

Cultural Heritage Travelers: Segmentation





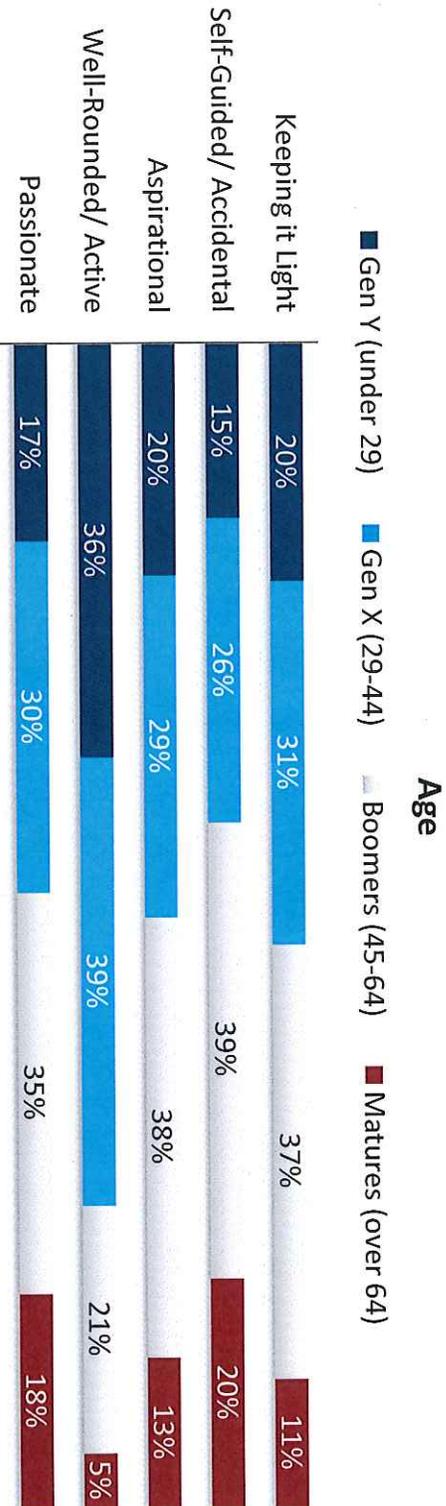
Demographics



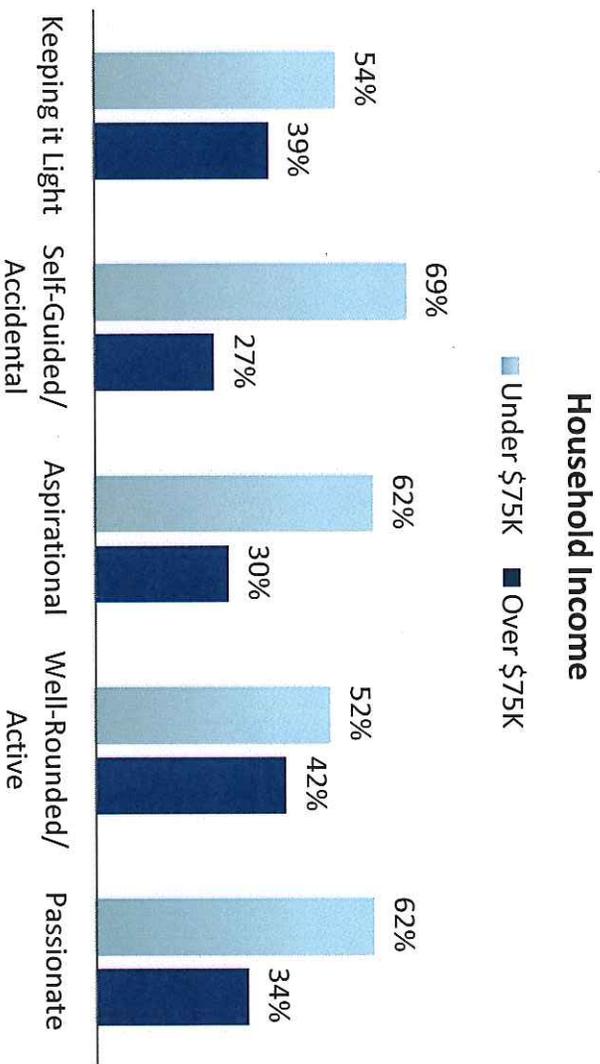
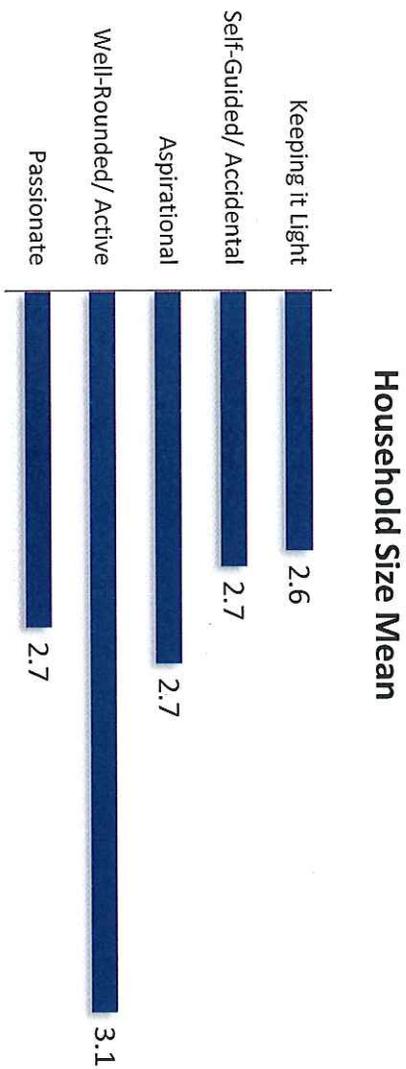
Segment Demographics

	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded/Active	Passionate
Sample Size	299	245	327	446	345
Gender					
Male	46%	51%	47%	56%	42%
Female	54%	49%	53%	44%	58%
Race					
White/Caucasian	84%	87%	80%	73%	88%
Black/African-American	2%	3%	3%	3%	2%
Asian/Pacific Islander	10%	8%	11%	16%	8%
Native American	2%	2%	5%	3%	1%
Something else	4%	3%	2%	5%	3%

[D57B- GENDER] First, what is your gender?
 [D59 - RACE] Are you white, black, Asian, Native American, or something else? Please select all that apply.



Segment Demographics (Continued)

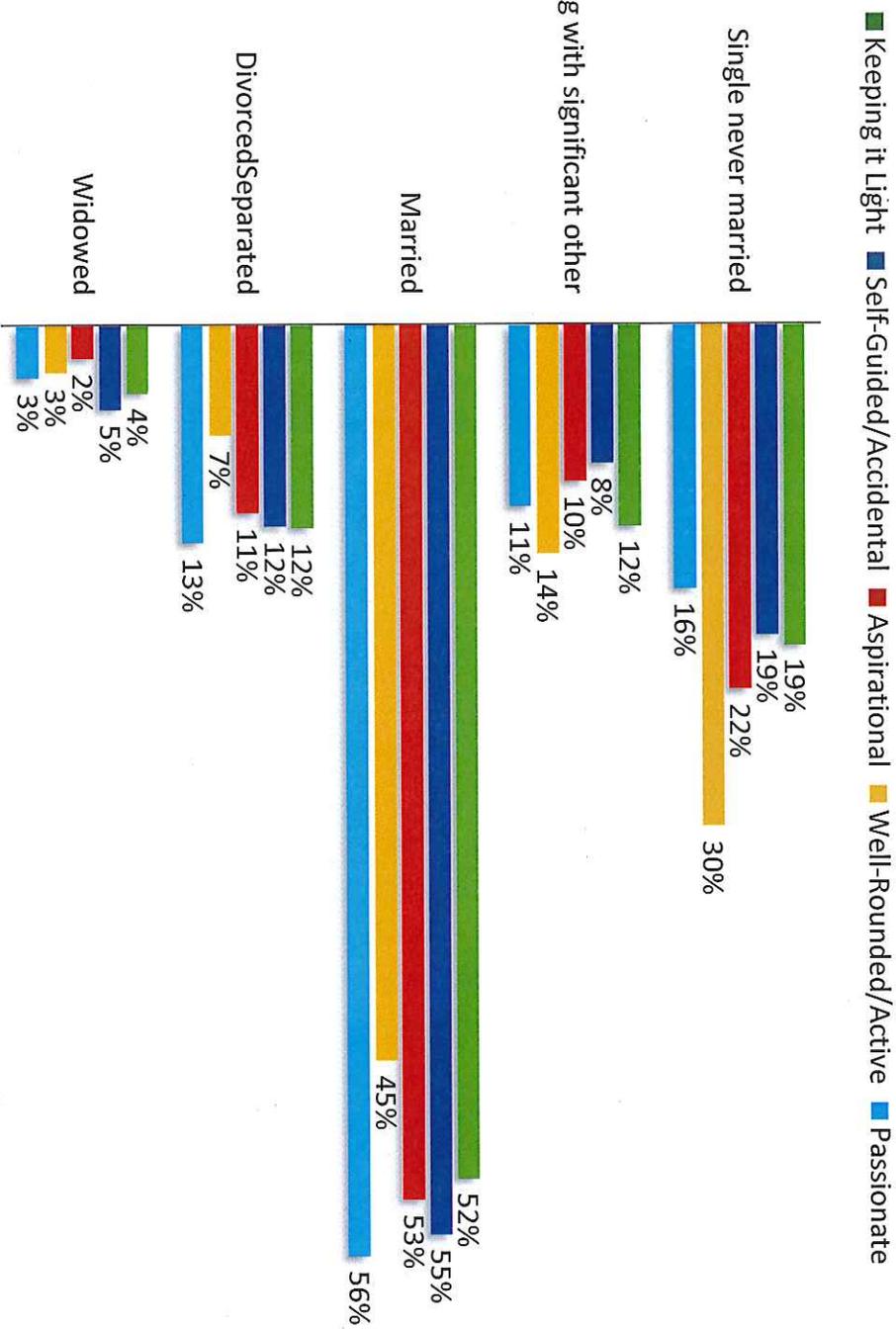


[D62 – HOUSEHOLD SIZE] Please indicate your household size, or the number of people there are in your household.



Segment Demographics (Continued)

Marital Status

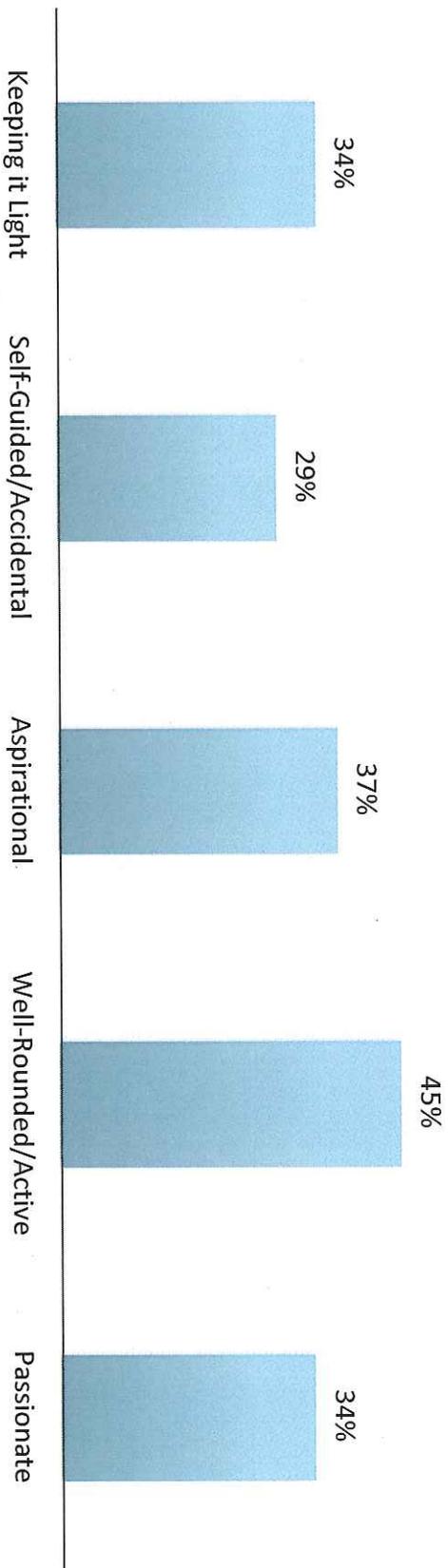


D61. Which of the following describes your marital status?



Segment Demographics (Continued)

Children 18 and Under in Household



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



Segment Demographics (Continued)

Education	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded Active	Passionate
Less than 9th grade	0%	0%	1%	1%	0%
9th to 12th grade no diploma	1%	4%	2%	1%	1%
High School Graduate or GED	12%	21%	14%	15%	11%
Some college, no degree	36%	28%	30%	29%	34%
Associates Degree	17%	11%	12%	11%	14%
Bachelors Degree	24%	26%	26%	30%	25%
Graduate or Professional Degree	11%	11%	14%	13%	15%

Employment	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded Active	Passionate
Employed Full-time	41%	33%	44%	54%	44%
Employed Part-time	13%	11%	14%	13%	15%
Full-time homemaker	10%	9%	10%	7%	10%
Full-time student	4%	5%	4%	7%	3%
Self-employed	8%	6%	6%	7%	4%
Retired	15%	27%	14%	7%	19%
Unemployed	6%	7%	6%	3%	4%

D66. What is the highest level of education that you personally have completed?
 D67. What is your current employment status?



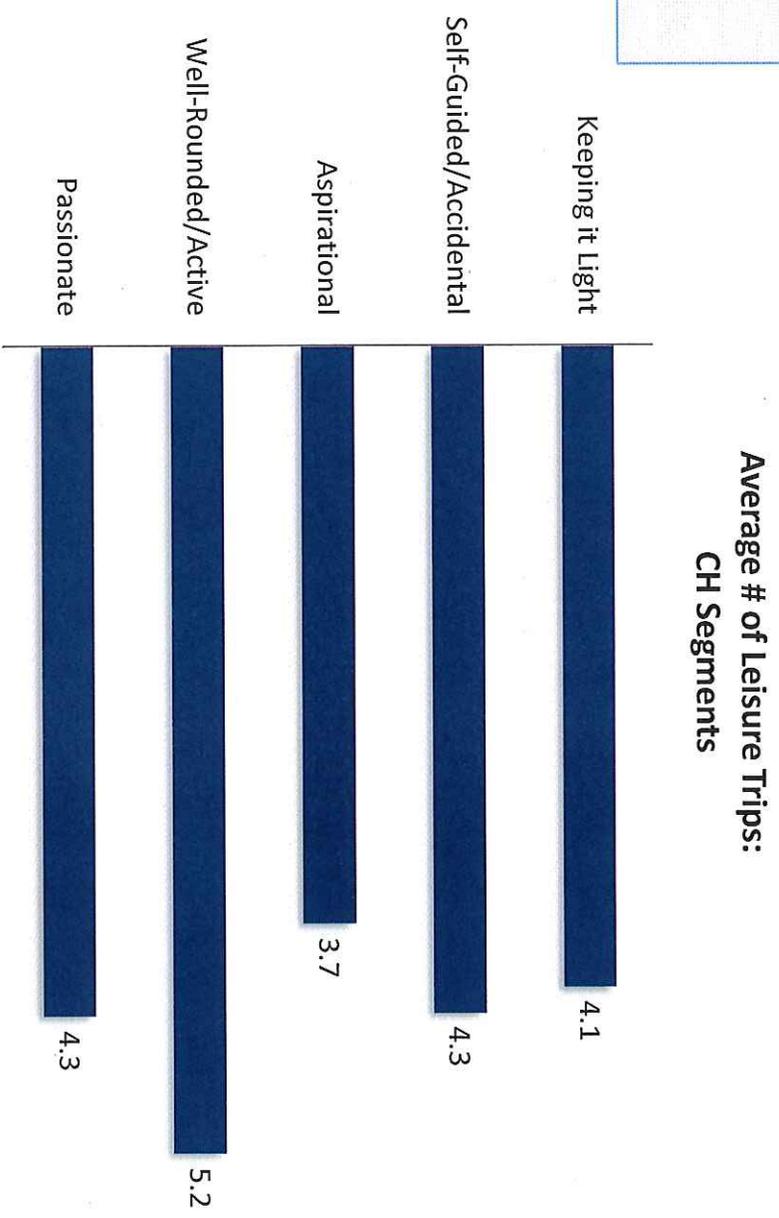


Trip Frequency



Well Rounded Cultural and Heritage Travelers Travel More Frequently

2009 National Segments
 Keeping it Light: 5.4
 Self-Guided/Accidental: 6.61
 Aspirational: 3.61
 Well-Rounded/Active 5.82
 Passionate: 4.87

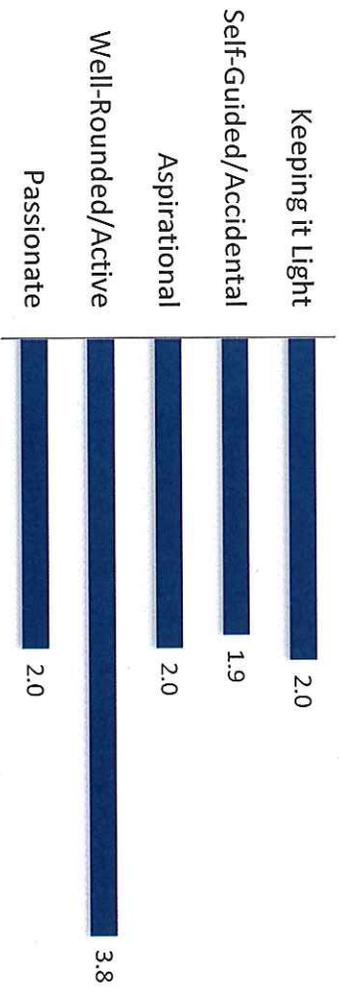


S1. Thinking of all the trips you have taken away from home of at least 50 miles one-way **OR** where you spent at least one overnight in the past 12 months, approximately how many of these trips were for each of the purposes listed below? Leisure (pleasure, vacation, or personal purposes) within the U.S.

Well Rounded and Active Travelers Most Often Combine Business and Leisure and Take International Trips

Combined Leisure and Business Trips

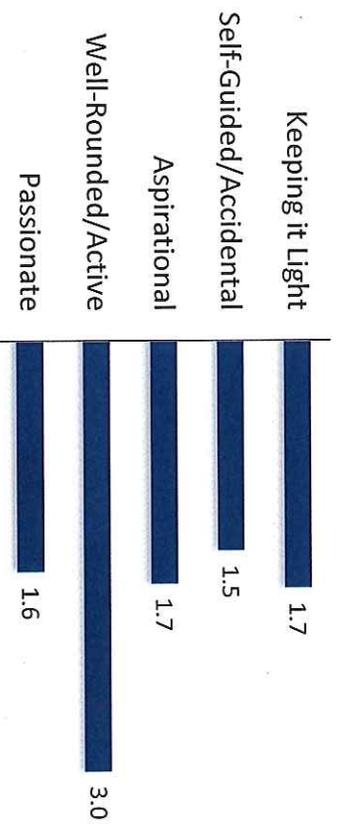
CH Segments



2009 National Segments
 Keeping It Light .66
 Self-Guided/Accidental .45
 Aspirational .58
 Well-Rounded/Active 2.45
 Passionate 1.30

International Trips

CH Segments

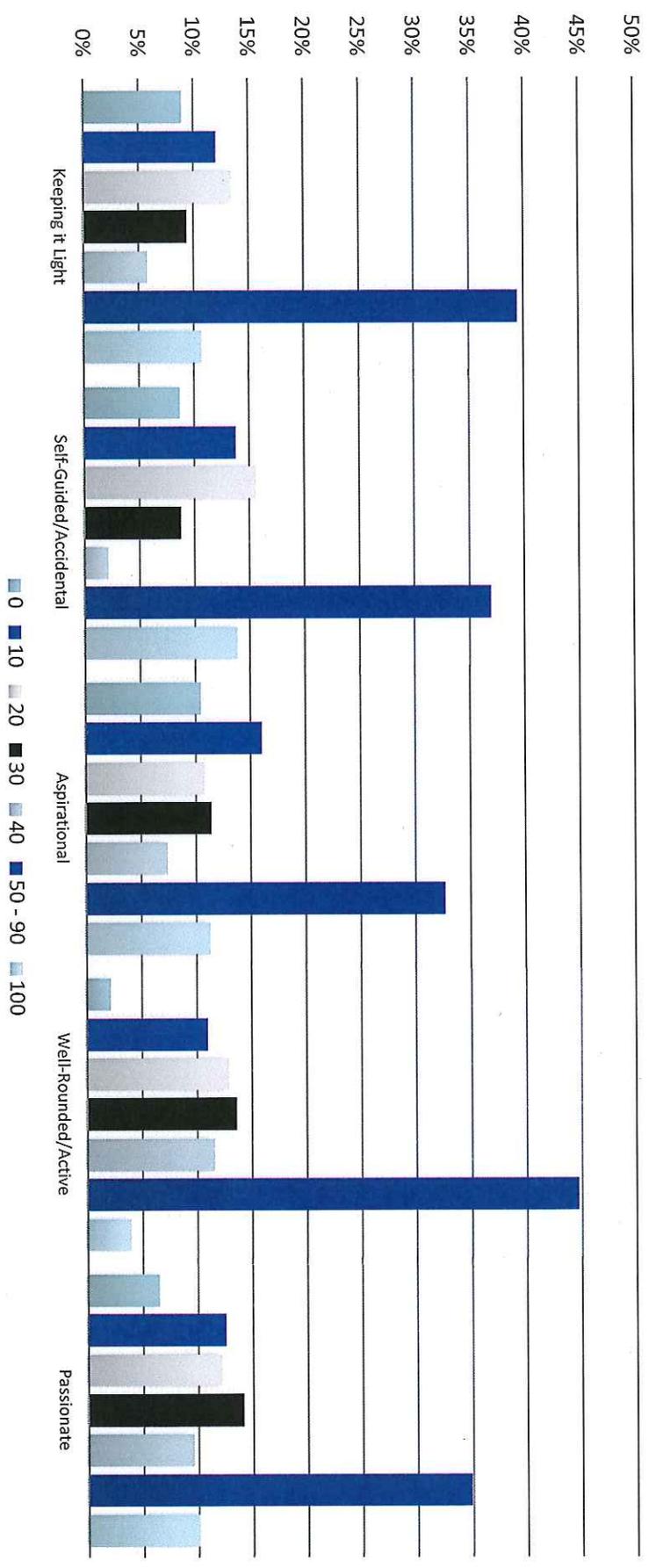


2009 National Segments
 Keeping It Light .37
 Self-Guided/Accidental .30
 Aspirational .39
 Well-Rounded/Active 1.53
 Passionate .70

S1. Thinking of all the trips you have taken away from home of at least 50 miles one-way OR where you spent at least one overnight in the past 12 months, approximately how many of these trips were for combined business and leisure within the US or International travel for pleasure/and or business?

Well-Rounded Active Travelers Take the Greatest Number of Business Trips That Also Include Leisure Activities

Domestic Business Travel that Includes Leisure Activities



Nationally (2009), Keeping it Light and Self-Guided travelers included personal and leisure activities in their business trips most often.

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

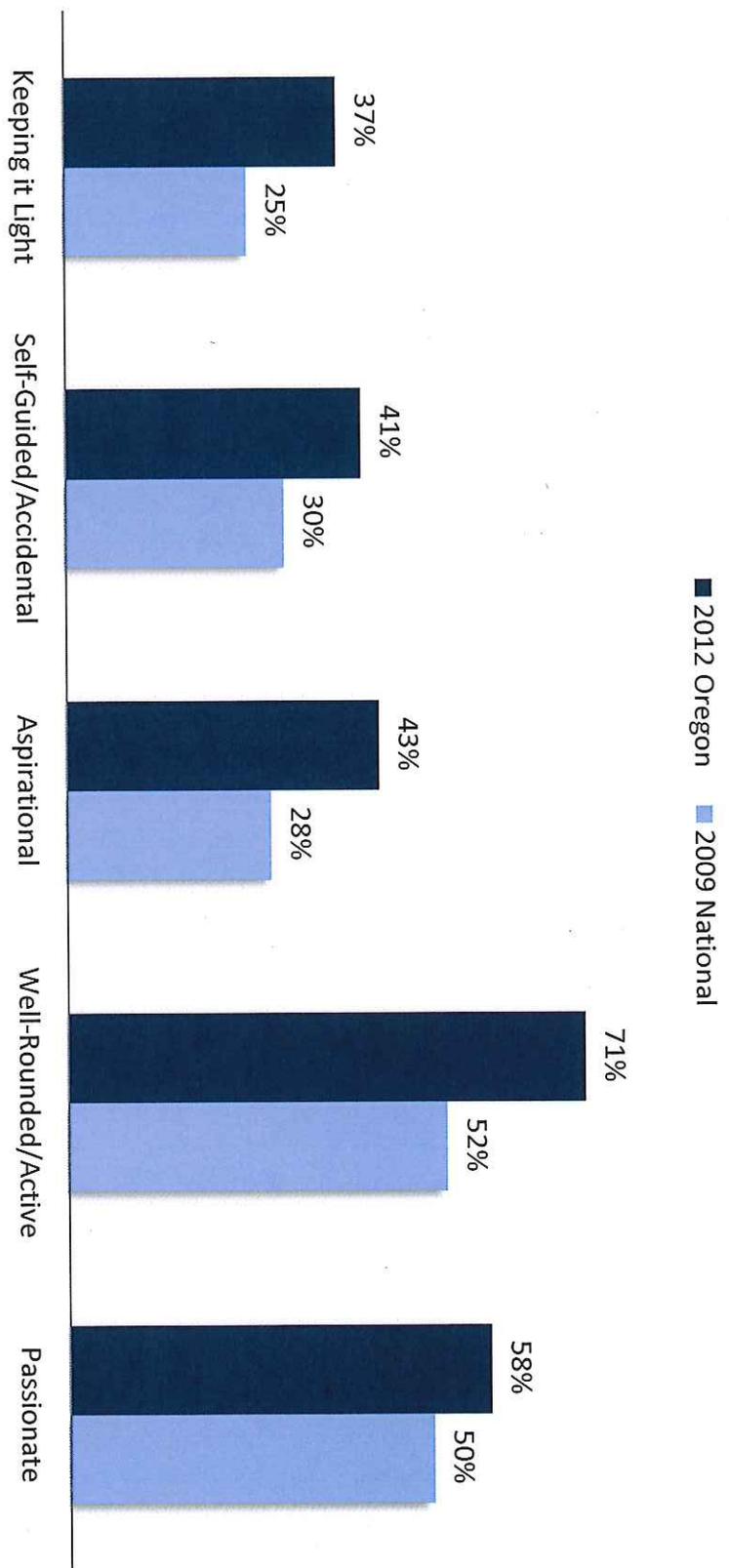


Cultural and Heritage Awareness



Across all Segments, Awareness of the Term CH is Considerably Higher Among the Oregon Target Markets

Awareness of Term Cultural Heritage Traveler Segments

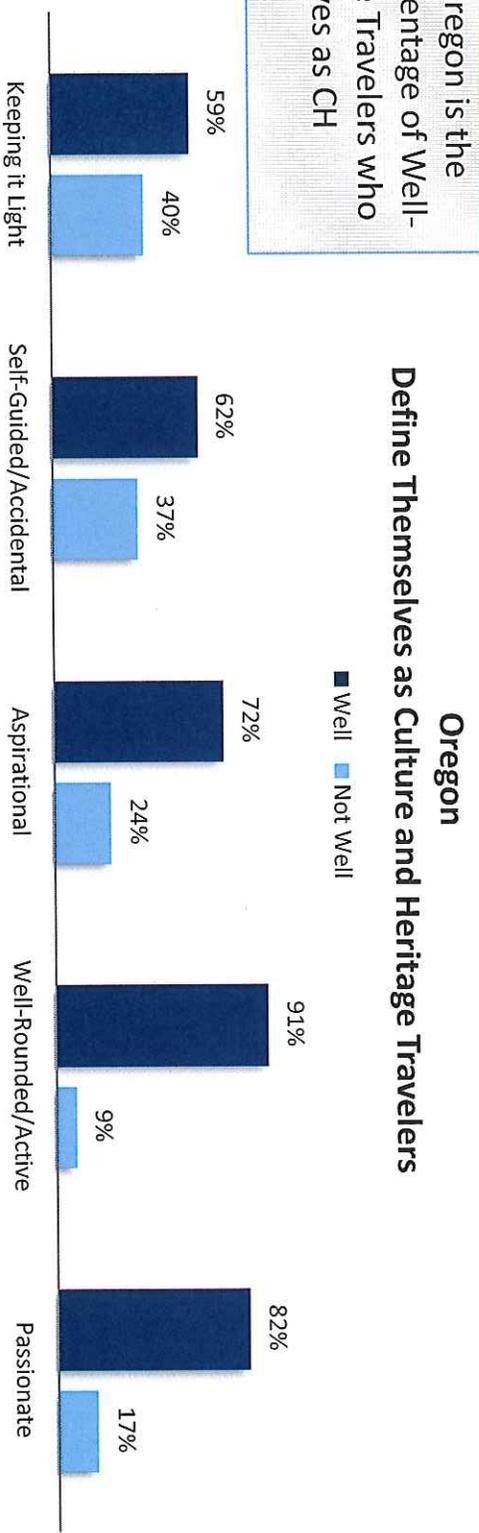


Q6. The term "cultural and/or heritage traveler" is sometimes used to describe certain types of Leisure travelers. Have you ever heard of this term?

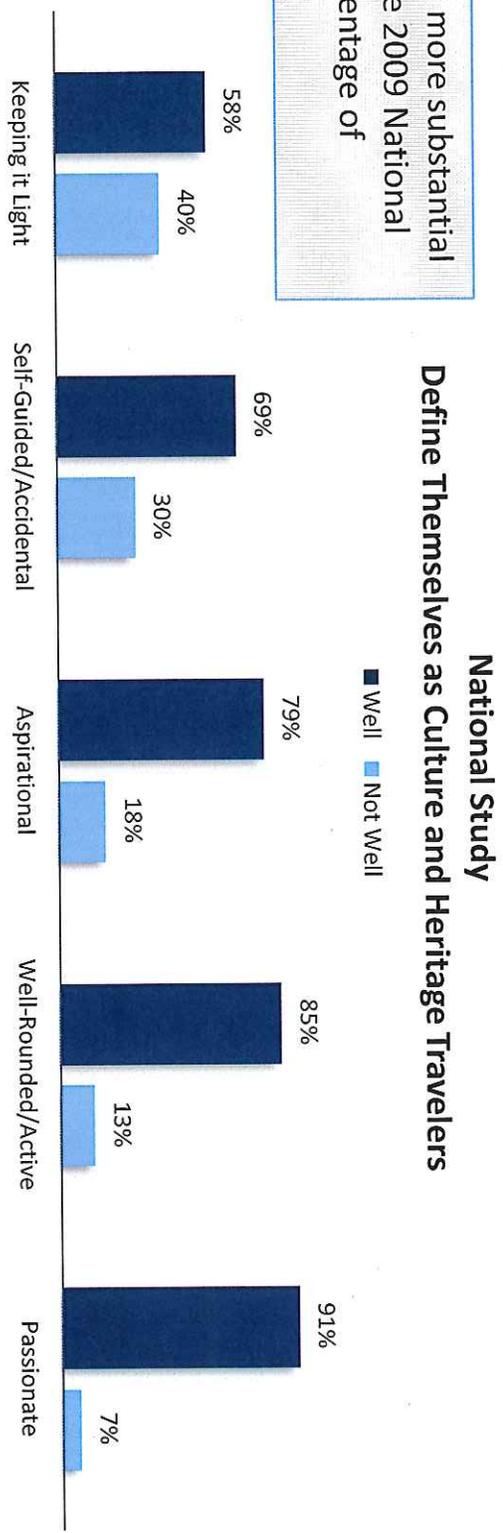


The Best Opportunity for Targeting CHTs is to Focus on Those in the Segments of Well-Rounded/Active and the Passionates

Significant for Oregon is the increase in percentage of Well-Rounded/Active Travelers who define themselves as CH travelers.



There has been a more substantial increase since the 2009 National study in the percentage of Passionates.



[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? Top 2/Bottom 2 n=2000



Awareness and Knowledge of Oregon

Reading the Oregon Icon Map

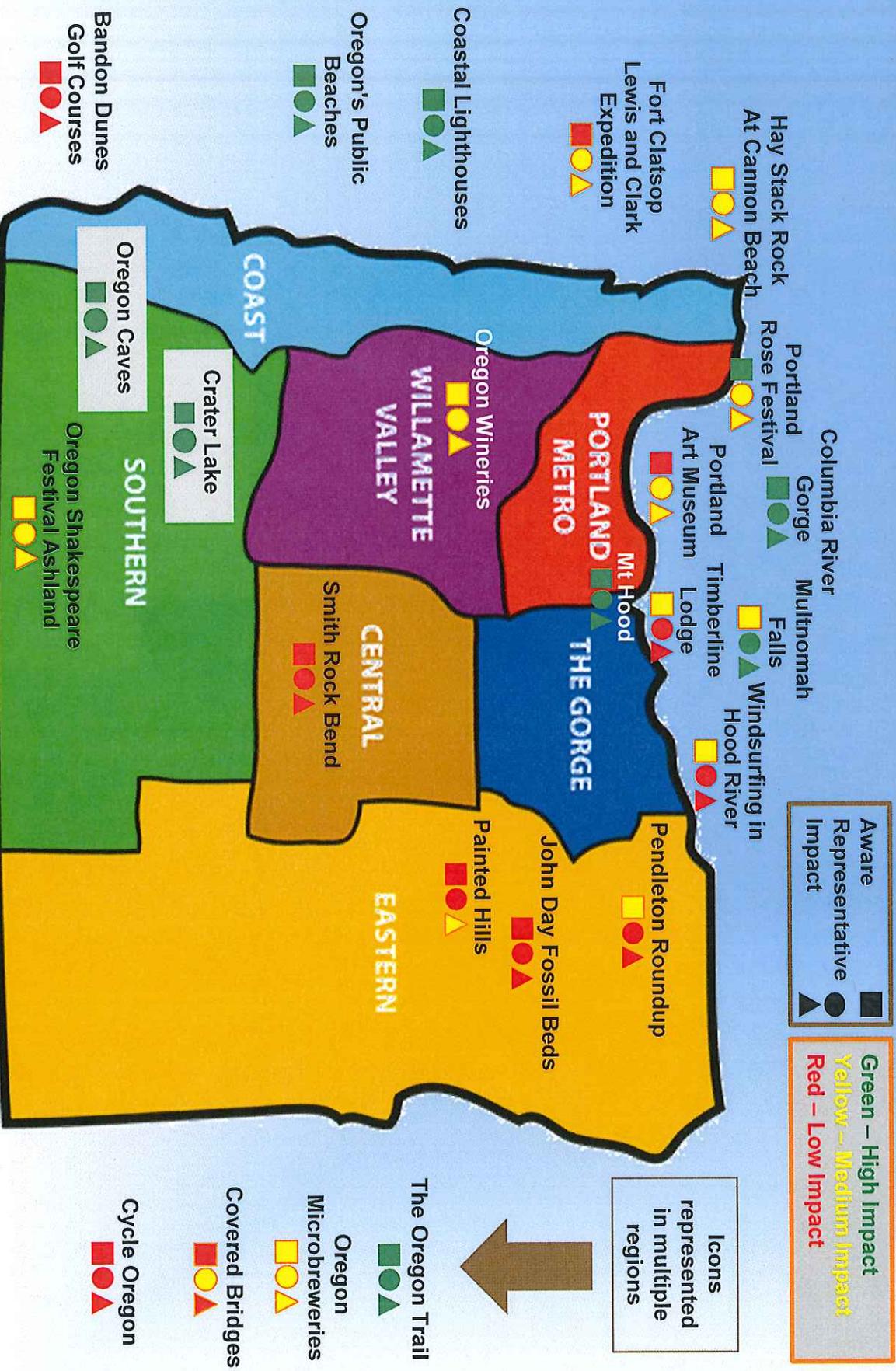
- The following slide shows 24 icons that were evaluated in the 2012 Oregon Cultural and Heritage travelers study. For each icon, a symbol is noted for each of the three questions that were asked about each icon: *
 - Traveler’s awareness of the icon;
 - How well the icon represents Oregon, and;
 - The icon’s impact on planning a trip to Oregon.
- Travelers’ responses for each question were ranked by percentages and then split into three equal groups: high (green), medium (yellow), and low (red.) Therefore, green means there is high awareness, high representation of Oregon, and high impact on planning a trip to Oregon. Yellow means that the icon has moderate awareness, representation, and impact, while red means it is low awareness, representativeness, and impact.

In this framework, “green” denotes an icon that is having more impact than icons with yellow and red indicators. Yellow and red indicators suggest that more work could be done to increase the impact these icons might have on travelers, their perception of Oregon, and their decision to visit the State.

1. Which of the following [attractions and activities] are you aware of?
2. 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?
3. Please rank the top 5 attractions/activities that have the most impact on you when planning a trip to Oregon with 1 having the most impact and 5 having the least impact?



Oregon Icons by Region



Map source: Oregon.Gov



Mandala Research, LLC

Insights • Strategy • Results

Ranking of Icons

Icon rankings were developed by indexing scores of the 3 questions addressing awareness of the icon, its representativeness of Oregon, and its impact on trip planning.

The ranking is relative to the highest scoring icons, the Oregon Trail, Mt. Hood and Crater Lake, that all rank at the top. While all three have the highest rankings among the 24 icons, this does not mean they had 100% awareness, representativeness, or impact among travelers. Rather, they had the highest rankings on these variables.

Absolute rankings by travelers of these icons on each question can be found on preceding slides.

Icon	Rank
The Oregon Trail	1.0
Mt Hood	0.97
Crater Lake	0.95
Oregon's public beaches	0.84
Columbia River Gorge	0.75
Coastal Lighthouses	0.56
Oregon Caves	0.51
Multnomah Falls	0.49
Portland Rose Festival	0.48
Oregon Wineries	0.40
Oregon Shakespeare Festival (Ashland)	0.38
Hay Stack Rock at Cannon Beach	0.33
Pendleton Roundup	0.33
Oregon Microbreweries	0.28
Timberline Lodge	0.27
Fort Clatsop (Lewis and Clark expedition)	0.24
Portland Art Museum	0.24
Windsurfing in Hood River	0.23
Covered Bridges	0.22
Painted Hills	0.21
John Day Fossil Beds	0.20
Brandon Dunes Golf Courses	0.17
Smith Rock Bend	0.14
Cycle Oregon	0.14



The Oregon Trail and Mt Hood Are Considered Most Representative of Oregon Especially Among Keeping it Light and Aspirational Segments

% Ranking Each #1 or #2

Most Representative of Oregon	Keeping it Light	Self-Guided/Accidental	Aspirational	Well-Rounded/Active	Passionate
The Oregon Trail	26%	28%	31%	19%	29%
Mt. Hood	26%	23%	25%	18%	22%
Crater Lake	23%	30%	21%	16%	22%
Oregon's public beaches	21%	23%	18%	15%	22%
Columbia River/Gorge	14%	20%	14%	12%	14%
Coastal Lighthouses	12%	10%	9%	10%	19%
Oregon Caves	10%	10%	13%	10%	8%
Multnomah Falls	6%	10%	10%	10%	7%
Portland Rose Festival	8%	4%	7%	8%	8%
Oregon Wineries	10%	3%	8%	12%	6%
Oregon Shakespeare Festival (Ashland)	7%	4%	5%	9%	6%
Hay Stack Rock at Cannon Beach	6%	9%	5%	5%	6%
Fort Clatsop (Lewis and Clark expedition)	3%	4%	5%	6%	7%
Oregon Microbreweries	4%	1%	2%	7%	4%
Portland Art Museum	5%	2%	3%	7%	3%
Painted Hills	1%	5%	3%	4%	3%
Timberline Lodge	4%	1%	2%	5%	2%
Covered Bridges	3%	2%	4%	4%	4%
Pendleton Roundup	1%	1%	5%	2%	3%
Cycle Oregon	2%	0%	2%	7%	1%
Smith Rock (Bend)	2%	1%	2%	4%	1%
Bandon Dunes Golf Courses	2%	4%	2%	2%	2%
John Day Fossil Beds	1%	3%	1%	4%	2%
Windsurfing in Hood River	1%	1%	2%	4%	2%

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's Beautiful Public Beaches Have the Greatest Impact on Trip Planning for Respondents

	Sample Size	Keeping it Light	Self-Guided/Accidental	Aspirational	Well-Rounded Active	Passionate
Oregon's public beaches	299	2.3	2.4	2.6	446	345
Crater Lake	2.7	2.7	2.8	2.9	2.8	2.3
The Oregon Trail	3.0	2.6	2.7	2.9	2.9	2.8
Oregon Shakespeare Festival Ashland	3.2	3.1	2.6	2.8	2.8	3.0
Mt Hood	3.1	3.2	2.8	2.9	2.9	2.9
Coastal Lighthouses	2.9	3.0	3.1	3.1	3.1	2.8
Hay Stack Rock at Cannon Beach	3.1	3.1	3.3	2.8	2.8	2.7
Smith Rock Bend	2.6	2.9	3.4	2.9	2.9	3.2
Oregon Wineries	3.1	3.3	2.9	2.8	3.2	3.2
Columbia River/Gorge	3.2	3.0	2.9	3.3	2.8	2.8
Oregon Microbreweries	2.8	3.2	2.9	3.2	3.2	3.5
Fort Clatsop Lewis and Clark expedition	2.9	3.3	3.2	3.0	3.0	3.2
Portland Rose Festival	3.2	3.3	3.3	2.9	2.9	3.1
Multnomah Falls	3.3	3.3	2.9	3.0	3.0	3.3
Timberline Lodge	3.5	2.9	3.5	3.0	2.9	2.9
Oregon Caves	3.1	3.2	3.2	3.1	3.1	3.2
Painted Hills	3.3	3.1	3.4	3.0	3.0	3.1
Windsurfing in Hood River	3.2	2.8	3.3	3.2	3.2	3.1
John Day Fossil Beds	3.1	3.4	3.4	2.9	2.9	3.5
Portland Art Museum	3.2	3.5	3.6	3.0	3.0	3.2
Bandon Dunes Golf Courses	3.1	3.4	3.4	3.3	3.3	2.7
Cycle Oregon	3.0	3.6	3.2	3.4	3.4	3.3
Pendleton Roundup	3.1	3.1	3.3	3.3	3.3	3.9
Covered Bridges	3.4	3.6	3.5	3.2	3.2	3.9

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?



Among All Segments, the Most Impactful Attractions/Activities When Trip Planning to Oregon Are the Public Beaches and Crater Lake

% Ranking Each #1 or #2

Most Impact on Trip Planning	Keeping it Light	Self-Guided/Accidental	Aspirational	Well-Rounded/Active	Passionate
Oregon's public beaches	27%	32%	21%	19%	29%
Crater Lake	21%	23%	23%	16%	19%
The Oregon Trail	15%	23%	20%	15%	16%
Mt. Hood	15%	16%	17%	13%	18%
Coastal Lighthouses	14%	13%	12%	10%	17%
Columbia River/Gorge	8%	15%	13%	8%	17%
Multnomah Falls	9%	10%	13%	12%	9%
Oregon Caves	11%	8%	12%	10%	10%
Oregon Wineries	10%	5%	11%	11%	10%
Portland Rose Festival	7%	4%	6%	9%	5%
Oregon Shakespeare Festival (Ashland)	5%	5%	9%	10%	6%
Oregon Microbreweries	12%	5%	5%	5%	5%
Hay Stack Rock at Cannon Beach	7%	7%	4%	6%	7%
Painted Hills	4%	7%	4%	6%	5%
Portland Art Museum	4%	2%	3%	7%	5%
Fort Clatsop (Lewis and Clark expedition)	4%	4%	4%	6%	5%
Covered Bridges	4%	5%	4%	5%	3%
Bandon Dunes Golf Courses	6%	3%	3%	4%	2%
John Day Fossil Beds	4%	2%	3%	6%	4%
Timberline Lodge	3%	3%	2%	7%	3%
Pendleton Roundup	3%	4%	3%	3%	0%
Smith Rock (Bend)	2%	2%	2%	5%	2%
Cycle Oregon	2%	1%	4%	4%	2%
Windsurfing in Hood River	3%	2%	3%	4%	2%

Q41c. 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?

Awareness Of Oregon Icons is Consistent Across Segments with a Focus on the More Traditional Icons

Awareness of Oregon Icons	Keeping it Light	Self-Guided/ Accidental	Aspirational	Well-Rounded/ Active	Passionate
The Oregon Trail	63%	68%	57%	57%	70%
Mt Hood	63%	64%	51%	48%	68%
Crater Lake	54%	59%	48%	48%	64%
Columbia River Gorge	50%	52%	42%	37%	53%
Oregon's public beaches	46%	50%	36%	39%	52%
Coastal Lighthouses	42%	46%	30%	36%	50%
Portland Rose Festival	39%	38%	34%	36%	43%
Oregon Caves	41%	38%	31%	38%	42%
Oregon Wineries	42%	34%	28%	41%	45%
Multnomah Falls	37%	40%	30%	33%	40%
Oregon Shakespeare Festival Ashland	30%	31%	26%	29%	36%
Oregon Microbreweries	33%	25%	20%	29%	35%
Portland Art Museum	26%	28%	19%	34%	34%
Pendleton Roundup	21%	33%	22%	21%	29%
Hay Stack Rock at Cannon Beach	27%	28%	19%	22%	27%
Covered Bridges	24%	26%	19%	26%	31%
Timberline Lodge	23%	26%	18%	28%	24%
Fort Clatsop Lewis and Clark expedition	20%	29%	18%	23%	27%
Windsurfing in Hood River	22%	24%	18%	22%	24%
John Day Fossil Beds	20%	23%	13%	20%	26%
Bandon Dunes Golf Courses	15%	18%	13%	19%	22%
Painted Hills	11%	16%	8%	22%	20%
Smith Rock Bend	17%	17%	8%	20%	18%
Cycle Oregon	16%	15%	9%	22%	17%

Q41. Which of the following are you aware of in Oregon?



There is Agreement Among the Segments on the Top Icons and Whether They Represent Oregon

Only For Well-Rounded/Actives, is Mt. Hood more representative than The Oregon Trail

	Sample Size	Keeping it Light	Self-Guided/Accidental	Aspirational	Well-Rounded Active	Passionate
The Oregon Trail	299	2.4	2.6	3.27	4.46	3.45
Mt Hood	2.7	2.7	2.6	2.7	2.7	2.4
Oregon's public beaches	2.6	2.7	2.7	2.7	2.8	2.7
Crater Lake	2.7	2.7	2.7	2.8	2.9	2.9
Hay Stack Rock at Cannon Beach	2.7	2.7	2.7	3.1	3.0	2.2
Fort Clatsop Lewis and Clark expedition	3.2	3.6	3.6	3.2	2.7	2.7
Columbia River Gorge	3.2	2.9	2.9	3.0	2.9	3.1
Coastal Lighthouses	2.9	3.3	3.3	3.3	3.0	2.8
Oregon Shakespeare Festival Ashland	3.1	3.2	3.2	3.1	2.9	3.2
Multnomah Falls	3.4	3.2	3.2	3.0	2.9	3.1
Oregon Caves	3.2	2.9	2.9	3.1	3.2	3.4
Portland Rose Festival	3.1	3.4	3.4	3.3	3.2	3.0
Oregon Wineries	3.3	3.7	3.7	3.2	2.9	3.6
Timberline Lodge	3.0	3.6	3.6	3.4	3.2	3.3
Portland Art Museum	3.1	3.4	3.4	3.3	3.2	3.6
Cycle Oregon	2.8	4.5	4.5	3.9	2.9	4.1
Painted Hills	4.0	2.7	2.7	3.5	3.4	3.3
Windsurfing in Hood River	3.7	3.8	3.8	3.5	3.1	3.2
Bandon Dunes Golf Courses	3.7	2.8	2.8	3.3	3.5	3.3
Covered Bridges	3.6	3.8	3.8	3.2	3.2	3.4
John Day Fossil Beds	3.5	3.0	3.0	3.7	3.4	3.4
Oregon Microbreweries	3.3	3.7	3.7	3.6	3.2	3.5
Pendleton Roundup	3.6	3.9	3.9	2.8	3.6	3.6

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?

Well-Rounded/Active and Aspirational Respondents Are Most Captivated by Oregon's Natural Beauty and Coastline

Among Those Considering a Trip to Oregon in Next 12 Months	Keeping it Light	Self-Guided/Accidental	Aspirational	Well-Rounded/Active	Passionate
Beaches/Oregon Coastline	21%	25%	25%	22%	19%
Landscape/Scenery/Natural Beauty/The Woods/Green	18%	14%	21%	23%	18%
Attractions: Light House/ Malls/ Historical Places/Gardens/Bookstores	11%	14%	15%	7%	8%
Friends and family / Time with family/Visiting family	8%	17%	10%	10%	5%
Like it / cool / Nice/ Great/Awesome	7%	8%	4%	13%	13%
Love the Outdoors/Outdoors/getting out into nature	9%	7%	9%	11%	12%
Mountains/beautiful hills/Mount Hood/painted hills/volcanic mountains/haystack rock	6%	6%	10%	9%	9%
Natural Attractions/Crater Lake area/diversity of attractions	3%	10%	9%	8%	5%
It's not far/ closer than other states/near of it	5%	4%	9%	6%	7%
Shopping/Tax free shopping /No sales tax	9%	2%	6%	3%	8%
New things to see/something different/new place to explore/ Unique Experience/Learning new things	5%	5%	2%	3%	4%
Born/Live There	4%	0%	3%	2%	3%
Never been there before./Never experienced	5%	5%	5%	1%	2%
People / Friendly people/ New People/ friends/ Different people/Nice Communities/less people	3%	4%	3%	5%	1%
Beer/ Micro breweries	2%	3%	5%	1%	4%
Trails / Exploring Oregon trails	1%	6%	4%	3%	2%
Culture/Cultural Aspects/ Cultural Activities/	1%	4%	3%	2%	3%
Sports/outdoor activities/snow sports/golf	2%	1%	1%	0%	5%
Relaxing / Peaceful/laid back atmosphere	1%	3%	1%	2%	1%
The Ashland Shakespeare Festival/Rose Festival	1%	0%	0%	3%	3%

Q43a. IF YES, what is most appealing to you about taking a trip to Oregon?



Activities



The Well-Rounded/Active and Passionate Segments Are Most Likely to Say They Have Visited a Cultural Heritage Site on Their Trip in the Past 12 Months

Types of Trip	Sample Size	Keeping it Light	Self-Guided/Accidental	Aspirational	Well-Rounded Active	Passionate
Vacation	299	72%	74%	67%	446	345
Visiting friends and relatives	299	62%	64%	55%	79%	80%
Weekend getaway	299	52%	43%	40%	66%	65%
Family Reunion	299	27%	19%	23%	59%	59%
Wedding	299	17%	11%	14%	39%	30%
Sports event	299	15%	15%	10%	31%	22%
Girlfriend getaway	299	17%	7%	12%	27%	13%
Visit a cultural/heritage site	299	6%	12%	8%	23%	14%
Getaway with the guys	299	12%	5%	6%	25%	18%
Church/religious outing	299	5%	8%	4%	20%	8%
School reunion	299	3%	2%	4%	16%	10%
Sorority /Fraternity	299	1%	4%	1%	15%	6%
					10%	3%

[S1b IF TAKEN LEISURE TRIP] And which of the following types of trips have you taken in the past 12 months: Choose as many as apply.

More Well Rounded and Passionate Travelers Take Part in a Variety of Activities: Shopping is the #1 Activity for Well-Rounded/Active Travelers

Top 20 Activities Done on Most Recent Trip	Sample Size	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded/Active	Passionate
Took a scenic drive	299	54%	24%	32%	44%	34%
Shopped (general, not locally made crafts/memorabilia)	299	55%	48%	36%	64%	60%
Explored small towns	299	39%	39%	28%	53%	54%
Self-guided walking tour	299	34%	38%	31%	57%	45%
Visited beaches/waterfronts	299	35%	35%	22%	53%	43%
Shopped at an outlet mall	299	40%	28%	28%	52%	39%
Shopped for items made by local artisans and craftspeople	299	25%	30%	19%	58%	48%
Went to a fine dining restaurant for a unique and memorable experience	299	34%	22%	21%	50%	30%
Experienced local or regional cuisine for a unique and memorable experience (not fine dining)	299	32%	19%	20%	50%	38%
Visited state/national parks	299	21%	40%	14%	49%	36%
Visited heritage buildings/historical buildings	299	9%	39%	13%	49%	44%
Visited a local farmers market	299	29%	20%	14%	48%	34%
Visited historic sites	299	10%	38%	10%	47%	39%
Participated in night life	299	36%	13%	16%	46%	23%
Explored urban neighborhoods	299	23%	22%	15%	45%	32%
Visited art museums/galleries	299	14%	34%	12%	46%	34%
Gambled	299	29%	23%	15%	36%	19%
Sampled traditional artisan products (e.g. cheeses, candies, jams, etc.)	299	23%	10%	11%	48%	34%
Participated in sports (golf, hiking, biking, birding, boating/sailing, hunting, fishing, snow sports, etc.)	299	21%	19%	12%	37%	22%
Shopped for gourmet food and wine	299	20%	11%	11%	45%	22%

Q20. [MOST RECENT TRIP ACTIVITIES] For the following activities, please indicate which you have done on your most recent trip, which you have done on a leisure trip within the past 3 years and which activities you consider to be cultural and/or heritage activities. n=2000



All Travelers Take Advantage of the Outdoors; As Expected, the CH Travelers More Often Visit Historic Sites and Buildings

Top 20 Activities Done in Past 3 Years	Keeping it Light	Self-Guided/Accidental	Aspirational	Well-Rounded/Active	Passionate
Sample Size	299	245	327	446	345
Visited beaches/waterfronts	60%	44%	21%	50%	61%
Took a scenic drive	51%	49%	26%	47%	60%
Visited state/national parks	63%	49%	16%	52%	59%
Shopped (general, not locally made crafts/memorabilia)	41%	40%	28%	44%	60%
Shopped at an outlet mall	54%	29%	29%	49%	57%
Explored small towns	38%	42%	23%	50%	59%
Visited art museums/galleries	36%	43%	23%	52%	62%
Visited a local farmers market	44%	33%	18%	52%	59%
Visited historic sites	29%	57%	10%	51%	73%
Visited zoos	51%	33%	15%	57%	50%
Attended an art/craft fair or festival	46%	17%	15%	58%	63%
Camped	50%	29%	18%	57%	42%
Visited heritage buildings/historical buildings	27%	52%	16%	50%	64%
Shopped for items made by local artisans and craftspeople	43%	32%	21%	45%	57%
Visited theme or amusement parks	49%	25%	17%	60%	45%
Went to a fine dining restaurant for a unique and memorable experience	42%	26%	17%	54%	54%
Visited aquariums	44%	26%	12%	56%	52%
Attended a live music performance (not classical)	53%	18%	5%	57%	51%
Visited history museums/centers	20%	48%	4%	57%	63%
Visited science museums/centers	29%	35%	7%	60%	53%

While participation in all CH activities is expected to be higher among the segments, interestingly, Well-Rounded /Active and Passionate travelers also visited theme parks and aquariums most often.

Q20. [MOST RECENT TRIP ACTIVITIES] For the following activities, please indicate which you have done on your most recent trip, which you have done on a leisure trip within the past 3 years and which activities you consider to be cultural and/or heritage activities.



Travelers Who Keep it Light or Are in the Passionate Segment Are Much More Likely to Identify Activities as CH

Activities Considered CH	Sample Size	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded/Active	Passionate
Visited heritage buildings/historical buildings	299	67%	52%	41%	34%	61%
Visited Native American sites	299	62%	44%	41%	40%	55%
Attended cultural and/or heritage fair or festival	299	64%	48%	39%	35%	55%
Attended historical re-enactments	299	64%	42%	39%	38%	55%
Visited historic sites	299	61%	46%	41%	31%	55%
Participated in an organized tour of local history or culture	299	65%	41%	38%	38%	51%
Visited living history museums	299	63%	38%	38%	32%	51%
Visited history museums/centers	299	60%	45%	38%	29%	50%
Visited natural history museums/centers	299	62%	40%	37%	30%	49%
Visited art museums/galleries	299	57%	44%	35%	29%	52%
Took a tour focusing on local architecture	299	58%	40%	33%	26%	46%
Researched family history	299	53%	33%	33%	33%	44%
Attended an art/craft fair or festival	299	40%	34%	30%	26%	38%
Shopped for items made by local artisans and craftspeople	299	37%	36%	29%	24%	41%
Visited science museums/centers	299	44%	27%	31%	23%	36%
Visited children's museums	299	44%	25%	27%	28%	26%
Visited farms and ranches	299	38%	24%	28%	26%	24%
Explored small towns	299	26%	29%	24%	21%	34%
Attended the theatre/play/opera	299	35%	23%	22%	20%	32%
Attended a professional dance performance	299	36%	20%	21%	21%	30%

Q20. [MOST RECENT TRIP ACTIVITIES] For the following activities, please indicate which you have done on your most recent trip, which you have done on a leisure trip within the past 3 years and which activities you consider to be cultural and/or heritage activities.



A Gap Clearly Exists Between Activities Considered Cultural/Heritage and Those Participated in by Cultural Heritage Travelers on Their Most Recent Trip

Activities	Done on Most Recent Trip and Past Three Years (Average)	Consider Cultural and Heritage Activity	Gap
Visited heritage buildings/historical buildings	37%	49%	-12%
Visited Native American sites	20%	48%	-28%
Attended cultural and/or heritage fair or festival	21%	47%	-26%
Attended historical re-enactments	14%	47%	-32%
Participated in an organized tour of local history or culture	18%	46%	-28%
Visited historic sites	37%	46%	-9%
Visited living history museums	19%	44%	-24%
Visited natural history museums/centers	27%	43%	-16%
Visited history museums/centers	31%	43%	-11%
Visited art museums/galleries	37%	42%	-5%
Took a tour focusing on local architecture	20%	39%	-19%
Researched family history	17%	39%	-22%
Attended an art/craft fair or festival	32%	33%	-1%
Shopped for items made by local artisans and craftspeople	39%	33%	6%
Visited science museums/centers	27%	32%	-5%
Visited children's museums	17%	30%	-12%
Visited farms and ranches	23%	28%	-5%
Explored small towns	43%	27%	16%
Attended the theatre/play/opera (live performance)	23%	26%	-4%
Attended a professional dance performance (ballet & other forms)	16%	26%	-10%
Visited "Hall of Fame" museum (sports, rock'n'roll, etc.)	15%	25%	-10%
Sampled traditional artisan products (e.g. cheeses, candies, jams, etc.)	32%	24%	8%
Attended live classical music performance	17%	24%	-8%
Experienced local or regional cuisine for a unique and memorable experience (Oregon fine dining)	35%	24%	11%
Self-guided walking tour	40%	22%	17%
Toured wineries or breweries/tasting locally made wines/brewed beers	26%	22%	4%

Q20 For the following activities, please indicate which you have done on your most recent trip, which you have done on a leisure trip within the past 3 years, and which activities you consider to be cultural and/or heritage activities?.



An Opportunity Exists for Oregon to Increase Visitation by Marketing Cultural/Heritage Activity Opportunities to Leisure Travelers (cont)

Activities	Done on Most Recent Trip and Past Three Years (Average)	Consider Cultural and Heritage Activity	Gap
Visited state/national parks	41%	22%	19%
Attended a food/wine fair or festival	23%	22%	2%
Attended a music fair or festival	22%	22%	0%
Explored urban neighborhoods	31%	20%	11%
Visited a local farmers market	37%	18%	18%
Attended a live music performance (not classical)	28%	17%	11%
Shopped at museum stores	28%	17%	11%
Volunteered or participated in community service	18%	16%	2%
Shopped for gourmet food and wine	28%	15%	13%
Personal enrichment (took seminars or courses)	16%	15%	1%
Visited aquariums	29%	13%	15%
Visited zoos	30%	13%	17%
Took a scenic drive	51%	13%	39%
Attended shows, boat, car, home, etc.	21%	12%	9%
Attended sporting events (professional, minor league, college, recreational leagues)	25%	12%	13%
Went to a fine dining restaurant for a unique and memorable experience	37%	12%	25%
Looked at real estate	20%	12%	8%
Participated in night life	31%	11%	21%
Spa services (i.e. massage, facials, manicure)	21%	10%	11%
Camped	28%	10%	18%
Visited beaches/waterfronts	43%	9%	34%
Visited theme or amusement parks	30%	9%	21%
Participated in sports (golf, hiking, biking, birding, boating/sailing, hunting, fishing, snow sports, etc.)	30%	9%	21%
Gambled	30%	8%	22%
Shopped (general, not locally made crafts/memorabilia)	48%	6%	42%
Shopped at an outlet mall	42%	5%	37%
Visited state/national parks	41%	22%	19%

Q20 For the following activities, please indicate which you have done on your most recent trip, which you have done on a leisure trip within the past 3 years, and which activities you consider to be cultural and/or heritage activities?





Behaviors and Motivators



Well-Rounded/Active Travelers Are Most Engaged and Have the Lightest Footprint

Agreement with Behaviors	Sample Size				
	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded/Active	Passionate
I prefer taking trips that are a combination of a wide variety of activities such as culture shopping nature exercise	299	245	327	446	345
I like to bring back local/regional memorabilia from the places I visit and share them with my friends and family	81%	70%	87%	84%	91%
I believe tasting foods/wines of the region I'm visiting is an important part of the cultural and/or heritage travel experience	76%	69%	77%	81%	84%
I seek travel experiences where the destination its buildings and surroundings have retained their historic character	70%	53%	75%	82%	76%
I like to pursue a life of challenge novelty and change	57%	64%	70%	79%	76%
I want my travel to always be educational so I make an effort to explore and learn about the local arts culture environment	61%	52%	64%	77%	70%
I am willing to pay more for travel experiences that do not harm the environment	45%	56%	60%	73%	68%
I spend more money on cultural and/or heritage activities while I am on a trip	51%	40%	59%	71%	58%
I would pay more for lodging that reflects the cultural and/or heritage destination I am visiting	34%	36%	48%	65%	61%
I often giveback by donating money volunteering etc to the cultural and/or heritage destinations I have visited while on a leisure trip	35%	23%	47%	64%	48%
I often giveback by donating money volunteering etc to the cultural and/or heritage destinations I have visited while on a leisure trip	30%	21%	43%	67%	40%

Behaviors Are Similar to the 2009 National Survey

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

For Passionate Travelers, Creating Lasting Memories is Slightly More Motivating than Relaxing

Enriching relationships ranked 3rd in 2009 National Survey.

Motivators for Activities	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded/Active	Passionate
Sample Size	299	245	327	446	345
Relaxing and relieving stress	96%	87%	94%	87%	92%
Creating lasting memories	92%	86%	94%	86%	95%
Trying a new experience	85%	80%	88%	86%	92%
Enriching my relationship with my spouse/partner/children	82%	74%	82%	83%	85%
Having stories to share back home	71%	64%	79%	80%	77%
To stimulate your mind/be intellectually challenged	63%	63%	70%	84%	81%
Learning more about history and local cultures	60%	65%	76%	83%	83%
Explore a different culture	60%	57%	86%	82%	82%
Pursuing outdoor recreational activities	67%	54%	66%	79%	70%
Pampering yourself	69%	48%	73%	74%	62%
Pursuing a hobby	55%	41%	53%	68%	50%
Seeking out solitude and isolation	50%	42%	51%	64%	50%
Providing educational experiences for my children	42%	39%	52%	68%	53%
Challenging myself physically/ to feel physically energized	45%	31%	52%	68%	47%

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



Eating at Nice Restaurants is Most Appealing Across All Segments; Cycling Opportunities Are Least Appealing

% Ranking Each #1

	Keeping it Light	Self-Guided/ Accidental	Aspirational	Well-Rounded Active	Passionate
Eating at nice restaurants	40%	31%	37%	24%	29%
Outdoor activities	39%	33%	26%	26%	29%
Cultural and Heritage attractions and activities	17%	29%	28%	35%	36%
Cycling opportunity	4%	7%	10%	15%	6%

Q40. When planning your vacation, which of the following is most important to you and which is least important? Please rank them on a 1 to 4 scale, where 1 is the most important factor and 4 is the least important factor.

