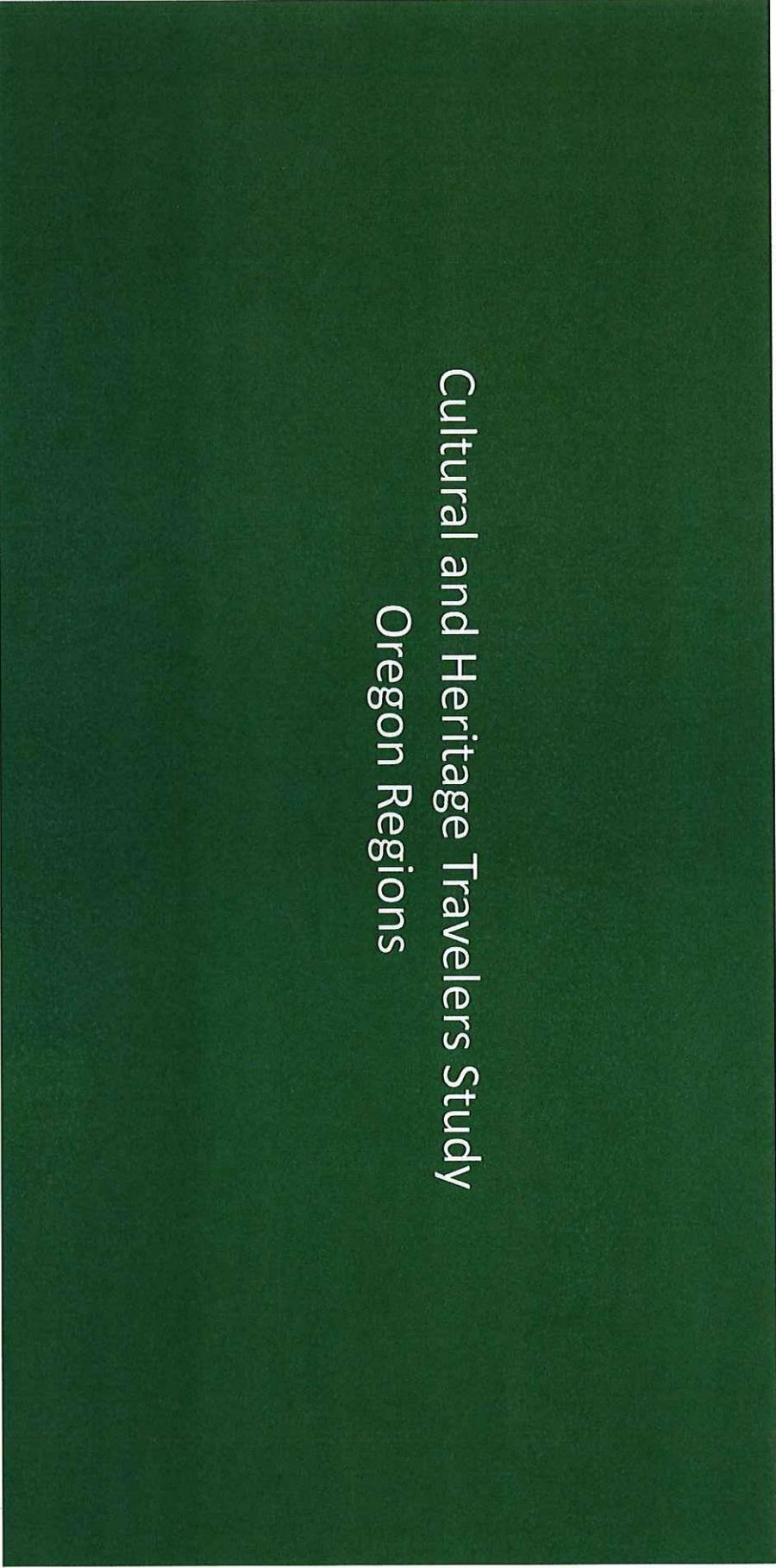




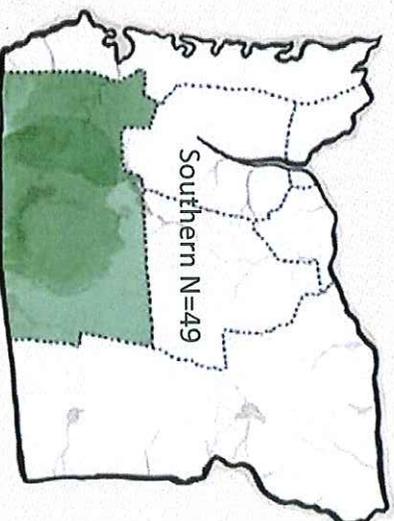
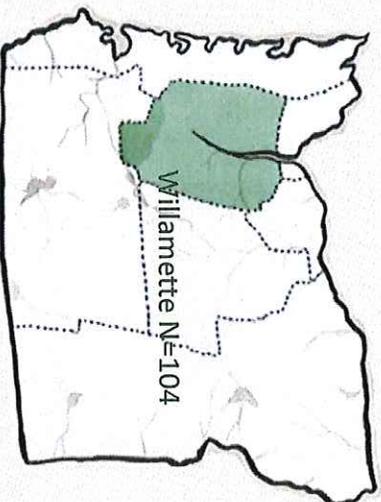
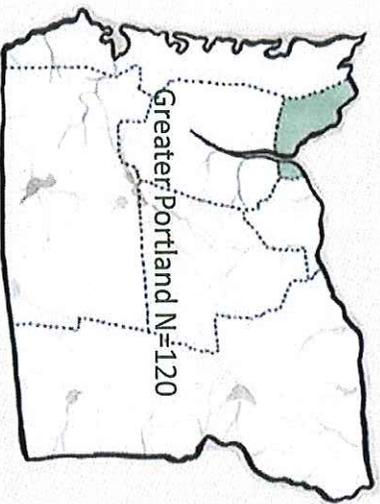
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# Cultural and Heritage Travelers Study

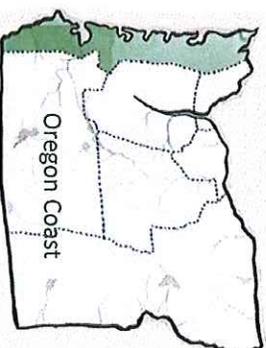
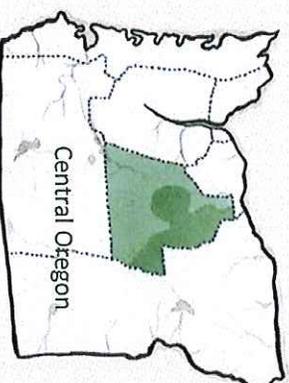
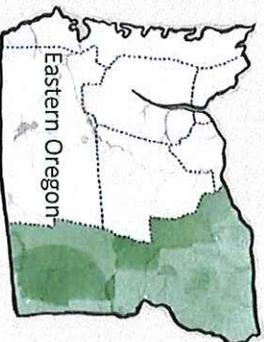
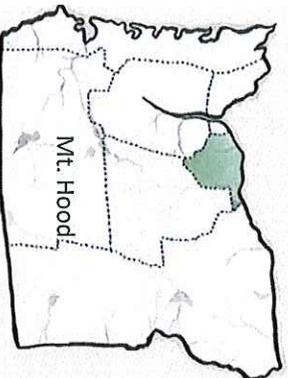
## Oregon Regions



# Regions Analyzed Based on Total Oregon Sample (N=350)



Other Regions Combined N=77



The following data provides insights into specific regions within Oregon, as defined by Travel Oregon. Because sample sizes of these regions are small, this information should be viewed directionally. Only actionable differences are noted.

The majority of respondents are from Greater Portland and the Willamette Valley, a total of 224 residents. Forty-nine residents of the Southern region also responded. Among the four other regions in the state, a total of 77 respondents participated in the survey.



## Featuring Greater Portland Region – Summary and Trip Characteristics



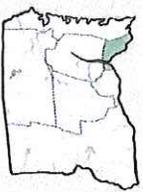
Within the population sampled for Oregon, the largest number of respondents in the survey come from the Greater Portland region. These urban dwellers travel further, spend more, and stay longer than those in any of the regions analyzed. Many more residents of this region are willing to pay more for lodging that reflects the heritage of their destination (49% versus 39% total Oregon), and want to learn and explore arts and culture on their trips (62% versus 55%).

They are also more concerned about their footprint, with 60% reporting they are willing to pay more for experiences that don't harm the environment. Attracting these travelers means giving them authenticity and local flavor, great food and a variety of cultural and heritage activities along with outdoor recreation. In short, this group from the Greater Portland region are most similar to our well-rounded segment in the overall sample.

A quarter of Portland area residents report taking between 5 and 9 leisure trips in the last 12 months, the highest number among any of the groups. These travelers reported taking three trips a year within Oregon. On their most recent trip, their average number of overnights was 9 compared to Oregon Total and Other at 7, Willamette at 6 and southern Oregonians at 5 overnights.

Over three quarters of all Portlanders and those living in the Willamette Valley took vacations in the past 12 months compared to 69% for total Oregon sample, 57% for those residing in southern Oregon and 54% in other regions.

## Featuring Greater Portland Region – Other Key Findings



Of the regions analyzed, those in the Greater Portland region are least likely to have vacationed in state on their most recent trip.

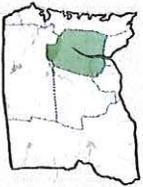
The distance traveled by this group is highest among the regions, 1070 miles compared with the total Oregon sample at 855 and their neighbors in Willamette traveling around 900 miles. Commensurate with this, Portlanders were also most likely among the groups to fly to their most recent leisure trip destination, 34% versus 29% for the total Oregon population. Just over half, 53% drove to the destination.

While this group spent only slightly more than those in Willamette Valley, \$1433 versus \$1461 per trip, they outspent their neighbors on meals: \$288 versus \$215 showing an appreciation of good dining options.

Greater Portland respondents are most likely to have taken a cruise on their last leisure trip; more than double the overall Oregon populations.

Portlanders are slightly more optimistic about the future: 37% say they will take more leisure trips in the next 12 months versus 31% for total Oregon and 26% for southern Oregon residents. Those in southern Oregon were most likely to say they will take fewer trips, 32% versus 18% for the total Oregon sample and 16% for Portlanders.

## Featuring Willamette Valley – Summary and Trip Characteristics



Willamette Valley residents make up the second largest of the regional segments and are an excellent target for a Culture and Heritage focus. Similar to those who reside in the Greater Portland area, these travelers spend more and stay longer than other Oregon residents.

They are just as likely as their urban counterparts to take a vacation and a weekend getaway and among the regions analyzed, the least likely to take a trip to visit friends and family. More than other regions, Willamette Valley travelers indicate their business trips include leisure activities. They are slightly more likely to get away with the guys. Among all the regions in Oregon, they are most likely to start with a destination in mind when making their destination selection.

More travelers from Willamette Valley stay at hotels, motels or resorts than do Portlanders and those from the southern region and more than the total Oregon sample. Only those who reside in the areas consolidated as other in this analysis are slightly more likely to stay at hotels. While the percentage is small, more Willamette residents said they stayed in an RV or tent (15%) than respondents in all the other regions.

When making their hotel choice, these travelers are slightly more likely to choose an independent property over a chain (31% versus 26% for Oregonians overall) and far more than those from southern Oregon (8%). In regards to this lodging decision, they are most comparable to Portlanders at 29%.



## Featuring Willamette Valley – Other Key Findings



The distance they travel is second only to Portlanders; Willamette Valley residents travelled about 900 miles on their most recent trip. The percentages of those who fly and drive are comparable to Oregon overall.

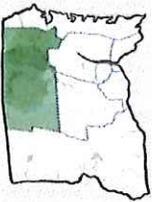
Valley residents are big spenders, with an average total spend for these travelers at \$1433 **and** they spend more on every component of the trip with the exception of dining, which is \$73 less than those from Portland.

They read community newspapers at a considerably higher rate than others in Oregon, 58% versus 51% overall and, not surprisingly, are the group who are most likely to read food and wine related publications of the total Oregon Sample.

While not by a large margin, Valley residents take more weekend cultural and heritage trips than other Oregon residents but agree with their fellow Oregonians on the number of trips they describe as culture and heritage trips they took in the last 12 months, 2.3. Only those from the consolidated regions (other) said more of their trips were CH trips, 2.6 in the last 12 months.

A concentration of these travelers, nearly a quarter, book 7-14 days ahead giving Oregon a chance to promote itineraries and attractions in the community newspapers to engage this high spend group.

## Featuring Southern Region – Summary and Trip Characteristics



This small sample yielded some interesting findings. Residents of southern Oregon stay closer to home, take fewer trips, spend less and tend to drive rather than fly to their destinations. They visit friends and family most often. To target them, we recommend short trip itineraries, ideally long weekends that are within 500 miles of home that include packages and discounts. Further, we recommend making sure that they are aware of all the offerings available within Oregon as they may pass this information along to friends and family.

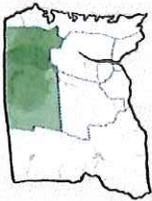
The number of leisure trips taken by residents of the southern region is slightly lower than for the total Oregon sample. On average, these travelers took four trips while others took 5 leisure trips over the last 12 months. Equally interesting is that all regional groups indicate they take an average of three trips within Oregon every year, making them very loyal travelers. More than half of southern Oregonians take trips of 3-4 days, 55% versus around a third for all the others regions.

For this group, visiting friends and family is the primary type of trip taken; nearly three quarters took this type of trip versus other regions wherein about 60% took trips to visit friends and family. Not surprisingly, this group is least likely to say they stayed in hotels, motels or resorts (47% versus the other regions 60% and the overall Oregon sample at 55%). Not only do Southern Oregonians stay with friends and family more often, they also **travel** with friends more often than other groups (25% versus 18% for Oregonians overall).

In terms of distance traveled, southerners stay closer to home than other Oregon travelers; they travel on average just over 600 miles, slightly less than the other regions at 620 miles, and much less than Portlanders at 1070 miles.



## Featuring Southern Region – Other Key Findings



This group were least likely to have flown on their most recent trip, 14% versus the overall Oregon sample at 29% and Portlanders at 34%. They drove to their destination most often; 71% used their own car on their most recent trip whereas around three fifths of Oregonians sampled said their car was the primary mode of transport.

Oregonians from the south are most likely to say they visited Oregon on their most recent trip, 58% versus 48% of the total Oregon sample with a lower number from the Portland region 40%.

While all Oregonians travel most often to California on out of state trips, the differences among the regions is worthy of note. For southern residents 45%, for Portlanders 23%, Willamette Valley 28% and for those in the other regions, 18%.

While over a quarter of Oregon travelers visited Washington State on their most recent leisure trip, only 14% of southern Oregon residents did so, likely because of distance.

Nevada was also a popular destination choice and again the differences are noteworthy, as nearly twice as many southern Oregon residents go to Nevada compared to those from Portland (20% versus 11%). Those from the other regions visited Nevada the least, 6%.

Residents of southern Oregon spent significantly *less* on their most recent trip, on average \$709, about half of what residents of Portland and Willamette Valley residents spent, \$1433 and \$1461 respectively.



## Featuring All Other Regions – Trip Characteristics

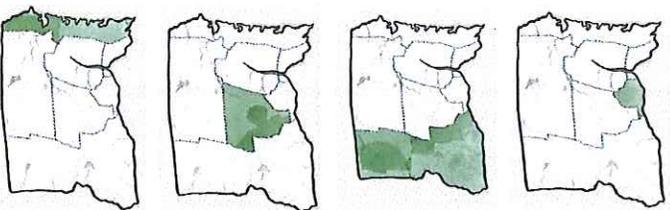
Residents of the 4 combined regions constituted a sample size of 77 responses. In the charts that follow, this group is referred to as “Other”.

Since these regions are dispersed throughout the state, targeting them is more challenging. We have analyzed this group and have provided insights where there are differences between this combined group and the responses provided by the total Oregon sample. The starkest differences appear to be between those in the south and this group.

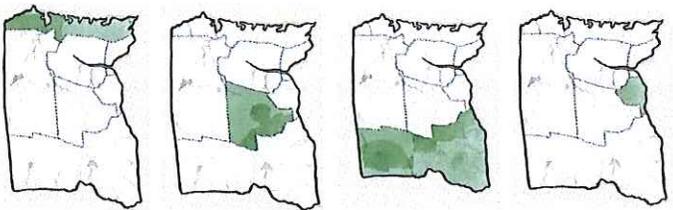
While there is no difference between this group and the Oregon sample in terms of leisure trips taken, they do differ when it comes to business travel. On average, they take more business trips than those in other regions, 2.4 versus 2.1 for the total. Further, they take trips that combine business with leisure to a greater extent, on average 3 trips per year compared with 2 trips for other regions.

Of the regions analyzed, this group is less likely to say they took a vacation (54% versus 68% of Oregon total and 77% of Portlanders) but said they took trips to get away with the girls and to sporting events more than all the other groups.

Residents of these regions are *least* likely to visit California and Nevada and *most* likely to visit Oregon on their most recent trip, tied with the southern region at 57%. On average, all regions report they take 3 trips to Oregon a year. These travelers also visit Washington State more than the other regions analyzed (31% versus around a quarter for the other regions except the south at 14%).



## Featuring All Other Regions – Other Key Findings



Of the groups analyzed, residents of these combined regions travel alone most often; 24% said they took their most recent trip alone whereas overall about 19% of Oregon travelers said this. Like their neighbors in Willamette, roughly half, 47%, traveled in a party of two compared with the total Oregon sample of 40% and Portlanders and southern residents 33%.

Three-fifths of these travelers stay in hotels, more than other regions analyzed and slightly more than Willamette residents. The good news is they are also much more likely to stay in an historic property than those in the other regions.

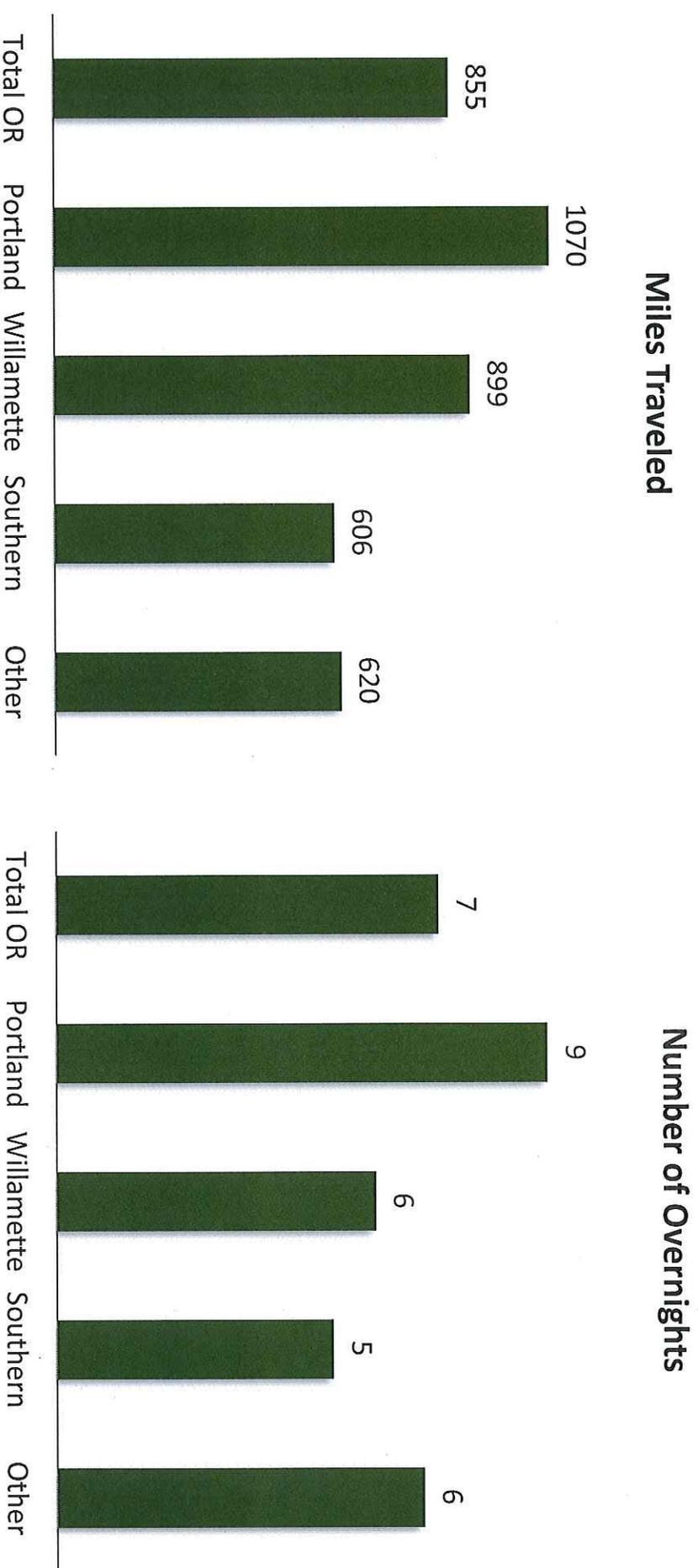
The distance they traveled, 620 miles, was considerably shorter than that of the total Oregon sample at 855 and only slightly longer than those from southern region at 606 miles.

Importantly, this group are most likely to say that the description of cultural heritage travelers defines them very well (30% said this compared to 24% of the overall Oregon sample, a further 74% said it described them somewhat well, compared to 68% for Oregonians).

Nearly four in ten of these travelers read travel related magazines, and this is slightly higher than other regions. They are far more likely than their neighbors to read Northwest Travel Magazine (37% versus around a quarter of Oregon residents overall except those in the south, in that region the readership is a meager 5%).

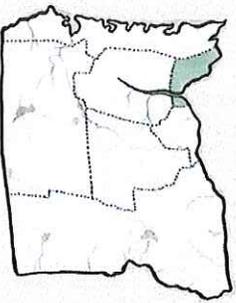


# Portlanders Travelled Furthest and Stayed Longest on Their Most Recent Trip, Making Them an Attractive Group



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 about the exact mileage, please make your best guess.  
 How many overnights did you stay while on this trip? If your trip was just a day trip, please select "0".

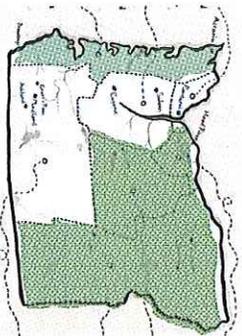
## Differentiators in Activities Participated in on Most Recent Trip



Portlanders are most likely to take a scenic drive and to shop both for general merchandise and for local artisan crafts. They are slightly more likely to visit beaches and considerably more likely to take a self-guided tour on foot. While they are out exploring small towns or urban neighborhoods, which they do more than other groups, they are likely to stop to experience local or regional cuisine. They visit historic sites and art museums more than other regions, but that doesn't mean they don't like the outdoors. Of all the groups analyzed, those from Portland most often said they participated in sports and visited state/national parks.



Valley residents vary less from the overall Oregon sample. They are also inclined to take a scenic drive, just slightly less than Portlanders. They shop at outlet centers more than the other regions, and are slightly more likely to visit heritage buildings than their in-state counterparts. They are less likely to shop for items made by local craftspeople or to visit a farmers market or sample traditional artisan products. They also participate in nightlife and gambling less than other regions. However, they are only slightly less likely than Portlanders to participate in sports.



Among the sample in the four other regions, residents are more likely than their neighbors to participate in shopping for local crafts, enjoying a meal at a fine dining restaurant, visiting a farmers market and exploring urban neighborhoods. Given that coastal Oregon is in this group, the fact that they visited beaches less often is not surprising. They are also less inclined than other Oregonians to visit museums or state/national parks.

Note: Residents of southern Oregon participated in activities at considerably lower rates than those in other regions, with the exception of visiting museums and galleries.

# More Portlanders Participate in Both CH and Outdoor Activities than Other Regions

Done on Most Recent Trip (sorted by OR TOTAL)	OR Total	Portland	Willamette	Southern	Other
Sample Size	350	120	104	49	77
Took a scenic drive	53%	60%	58%	31%	50%
Shopped (general, not locally made crafts/memorabilia)	50%	55%	49%	39%	51%
Explored small towns	45%	50%	44%	31%	44%
Visited beaches/waterfronts	42%	47%	46%	33%	32%
Self-guided walking tour	40%	48%	35%	29%	40%
Shopped for items made by local artisans and craftspeople	38%	42%	32%	27%	45%
Visited state/national parks	34%	40%	39%	23%	26%
Experienced local or regional cuisine for a unique and memorable experience (not fine dining)	28%	32%	26%	24%	27%
Went to a fine dining restaurant for a unique and memorable experience	28%	28%	25%	19%	37%
Shopped at an outlet mall	28%	27%	33%	12%	32%
Visited historic sites	27%	31%	24%	21%	29%
Visited heritage buildings/historical buildings	26%	28%	29%	18%	26%
Visited a local farmers market	26%	28%	21%	15%	35%
Visited art museums/galleries	25%	31%	23%	23%	19%
Sampled traditional artisan products (e.g. cheeses, candles, jam, etc.)	24%	26%	23%	18%	26%
Participated in sports (golf, hiking, biking, birding, boating/sailing, hunting, fishing, snow sports, etc.)	24%	30%	28%	5%	21%
Explored urban neighborhoods	23%	27%	21%	11%	29%
Participated in night life	23%	27%	20%	23%	22%
Gambled	21%	23%	19%	19%	20%
Visited history museums/centers	20%	27%	18%	11%	17%

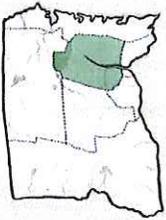
For the following activities, please indicate which you have done on your most recent trip.



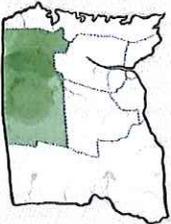
## Differentiators in Activities Participated in During the Last 3 Years



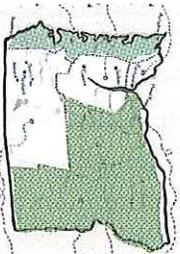
There are fewer differences between Portlanders and other Oregonians in terms of activities done in the last three years. They shopped for general merchandise less but visited local farmers markets and shopped for crafts more. They are most likely to enjoy a fine dining experience, shop for gourmet food and wine, visit the zoo, and take a self guided walking tour than their counterparts. Interestingly, they are also most likely to visit a theme park and to participate in night life.



Those from the Willamette Valley visit state/national parks, farms, historic sites and heritage buildings most among the regions, and are most likely to shop at an outlet mall but less inclined to shop for locally made crafts. These travelers also attend sporting events, camp and explore small towns, and, not surprisingly, attend food and wine festivals more than the other groups. On the other hand, they are most likely to attend boat and car shows.



Travelers from southern Oregon visited beaches and waterfronts more than the other regions; they are also most inclined to take a scenic drive but less likely to visit state or national parks, historic sites, zoos or museums. This group indulged in spa services more than their fellow Oregonians. Other than enjoying local cuisine, culinary activities are not popular with this group, they are least likely to tour wineries, attend food festivals, or to shop for food and wine.



All other Oregon travelers participated in activities to an equal or lesser extent than their counterparts with the exception of attending all types of festivals, sampling traditional artisan products, and experiencing local cuisine.

# Portlanders and Willamette Valley Residents Participated in Cultural and Heritage Activities More Than Other Regions Over the Last 3 years

Done in Last 3 Years (Sorted by OR TOTAL)	OR Total	Portland	Willamette	Southern	Other
Sample Size	350	120	104	49	77
Visited beaches/waterfronts	50%	51%	55%	56%	39%
Took a scenic drive	48%	49%	44%	59%	46%
Visited state/national parks	45%	47%	53%	34%	40%
Shopped (general, not locally made crafts memorabilia)	42%	38%	45%	49%	41%
Visited a local farmers market	42%	46%	44%	40%	36%
Shopped at an outlet mall	42%	40%	47%	50%	35%
Visited art museums/galleries	41%	40%	44%	36%	39%
Visited historic sites	40%	38%	47%	41%	33%
Visited heritage buildings/historical buildings	40%	40%	48%	26%	38%
Went to a fine dining restaurant for a unique and memorable experience	39%	44%	39%	38%	33%
Shopped for items made by local artisans and craftspeople	39%	44%	33%	40%	39%
Explored small towns	38%	36%	45%	35%	36%
Attended an art/craft fair or festival	38%	37%	37%	38%	42%
Visited zoos	38%	45%	39%	42%	23%
Camped	38%	40%	44%	34%	28%
Visited aquariums	38%	41%	37%	39%	32%
Visited history museums/centers	35%	35%	33%	34%	40%
Sampled traditional artisan products (e.g. cheeses, candies, jam, etc.)	35%	34%	35%	32%	40%
Visited science museums/centers	35%	36%	39%	36%	27%
Self-guided walking tour	34%	40%	38%	25%	25%

For the following activities, please indicate which you have done on a leisure trip within the past 3 years.



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# Those in the Willamette Valley Have Been Most Likely to Either Attend Sporting Events or a Food/Wine Fair or Festival in Last Three Years

Done in Last 3 Years (Sorted by OR TOTAL)	OR Total	Portland	Willamette	Southern	Other
Sample Size	350	120	104	49	77
Toured wineries or breweries / Tasting locally made wines/brewed beers	33%	33%	37%	22%	35%
Attended sporting events (professional, minor league, college, recreational leagues)	32%	35%	42%	22%	21%
Attended a food/wine fair or festival	31%	34%	40%	13%	27%
Shopped for gourmet food and wine	31%	37%	28%	24%	31%
Experienced local or regional cuisine for a unique and memorable experience (not fine dining)	30%	29%	29%	29%	35%
Gambled	30%	30%	32%	32%	25%
Visited theme or amusement parks	30%	36%	28%	27%	24%
Shopped at museum stores	29%	30%	34%	23%	23%
Explored urban neighborhoods	28%	30%	27%	21%	31%
Visited natural history museums/centers	28%	30%	32%	27%	20%
Participated in night life	27%	34%	25%	28%	20%
Attended the theatre/play/opera (live performance)	27%	31%	31%	18%	21%
Attended a music fair or festival	27%	33%	28%	15%	23%
Attended shows: boat, car, home, etc.	26%	24%	34%	24%	20%
Spa services (i.e. massage, facials, maniture)	26%	26%	25%	32%	21%
Visited farms and ranches	25%	24%	31%	14%	26%
Attended cultural and/or heritage fair or festival	24%	27%	23%	11%	30%
Volunteered or participated in community service	23%	23%	26%	21%	22%

For the following activities, please indicate which you have done on a leisure trip within the past 3 years.

# Perception of What is Considered a Cultural and Heritage Activity Varies Among Regions with Visiting Heritage and Historical Buildings in the Lead

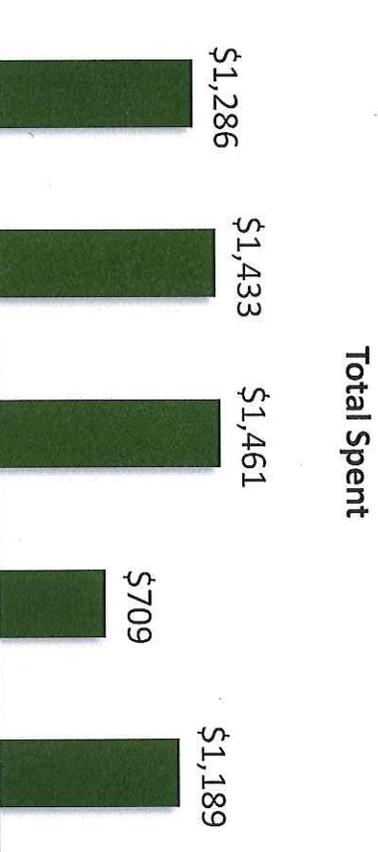
Consider this a CH Activity (Sorted by OR TOTAL)	OR Total	Portland	Willamette	Southern	Other
	Sample Size	120	104	49	77
Visited heritage buildings/historical buildings	350	46%	52%	58%	63%
Attended cultural and/or heritage fair or festival	50%	52%	51%	49%	46%
Attended historical re-enactments	48%	47%	49%	47%	49%
Visited historic sites	47%	44%	44%	54%	53%
Visited Native American sites	47%	49%	47%	47%	44%
Visited living history museums	47%	43%	48%	49%	50%
Visited history museums/centers	46%	43%	41%	47%	56%
Participated in an organized tour of local history or culture	46%	47%	45%	47%	44%
Visited natural history museums/centers	45%	42%	46%	50%	43%
Visited art museums/galleries	44%	43%	39%	49%	50%
Took a tour focusing on local architecture	38%	36%	40%	52%	32%
Researched family history	37%	43%	40%	34%	28%
Attended an art/craft fair or festival	37%	35%	34%	44%	40%
Visited science museums/centers	32%	31%	32%	41%	27%
Shopped for items made by local artisans and craftspiece	31%	29%	30%	47%	26%
Explored small towns	28%	31%	25%	38%	21%
Visited children's museums	28%	25%	30%	35%	24%
Attended the theatre/play/opera (live performance)	27%	25%	26%	34%	28%
Attended a professional dance performance (ballet & other forms)	26%	24%	26%	32%	24%
Self-guided walking tour	25%	23%	28%	31%	21%
Visited farms and ranches	24%	25%	25%	35%	17%
Visited "Hall of Fame" museum (sports, rock'n'roll, etc.)	24%	20%	29%	23%	24%
Attended live classical music performance	24%	18%	28%	25%	26%
Sampled traditional artisan products (e.g. cheeses, candies, jams, etc.)	24%	24%	23%	27%	22%
Attended a music fair or festival	24%	24%	22%	28%	22%

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

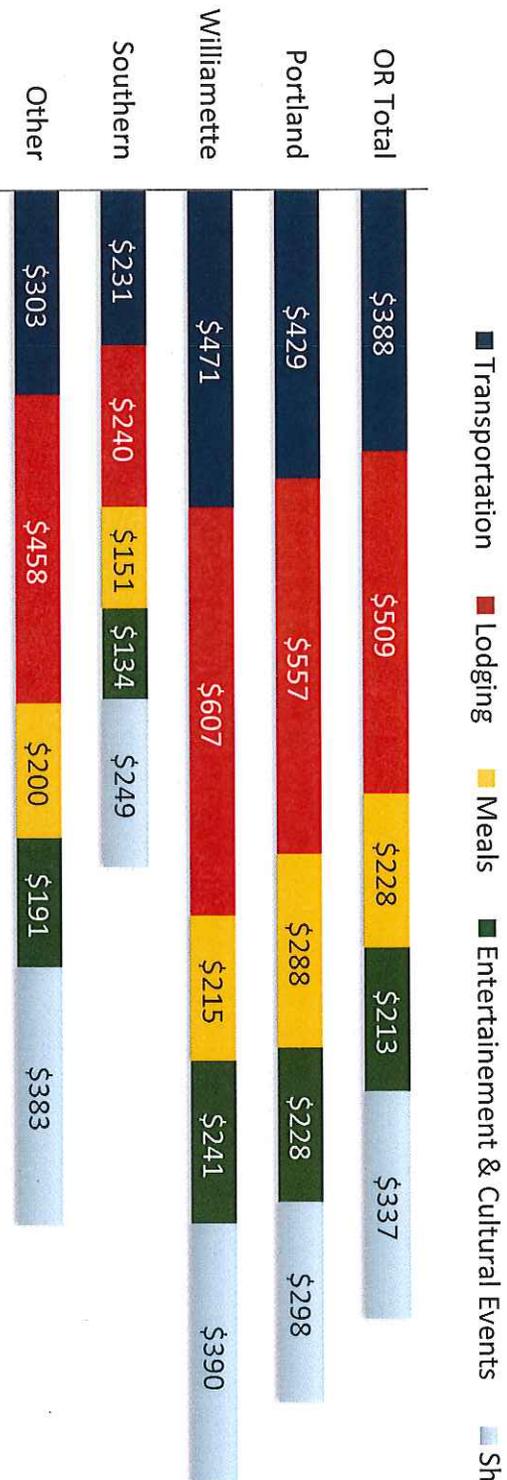


# Willamette Valley Residents Spend More on All Aspects of Travel Except Meals

Among Oregonians, greater Portland and Willamette Valley residents are the biggest spenders, while those from the south spent the least, about half what their urban counterparts spent on their last leisure trip. Residents of the four combined regions spend about the same amount on shopping as those from the Valley, more than those from Portland and the Total Oregon population sampled.



## Spending Breakdown



About how much would you say you, personally, spent in total on this most recent trip (including transportation, lodging, entertainment, food & dining expenses, etc.)? Please include spending on items that you paid for even if they were for other people  
 Breakdown: 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.



# Behaviors Vary Considerably Among the Regions Allowing Targeted Messaging Based on Area of Residence

Behaviors Sorted on OR Total	Behaviors Sorted on OR Total					
	Sample Size	OR Total	Portland	Willamette	Southern	Other
I prefer taking trips that are a combination of a wide variety of activities such as culture shopping nature exercise	350	76%	77%	80%	68%	76%
I like to bring back local/regional memorabilia from the places I visit and share them with my friends and family	350	71%	75%	67%	67%	74%
I seek travel experiences where the destination its buildings and surroundings have retained their historic character	350	70%	75%	69%	55%	72%
I believe tasting foods/wines of the region I'm visiting is an important part of the cultural and/or heritage travel experience	350	65%	68%	62%	61%	69%
I like to pursue a life of challenge novelty and change	350	61%	55%	68%	58%	65%
I want my travel to always be educational so I make an effort to explore and learn about the local arts culture environment	350	55%	62%	57%	34%	54%
I am willing to pay more for travel experiences that do not harm the environment	350	53%	60%	47%	44%	56%
I spend more money on cultural and/or heritage activities while I am on a trip	350	45%	43%	51%	44%	42%
I would pay more for lodging that reflects the cultural and/or heritage destination I am visiting	350	39%	48%	32%	33%	35%
I often giveback by donating money volunteering etc to the cultural and/or heritage destinations I have visited while on	350	30%	34%	27%	24%	31%

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



# Motivations Vary Slightly Less Than Behaviors But Can Still be Used For Targeted Messaging

Motivators Sorted on OR Total	OR Total	Portland	Willamette	Southern	Other	
	Sample Size	350	120	104	49	77
Relaxing and relieving stress		90%	89%	94%	87%	87%
Creating lasting memories		87%	88%	84%	85%	89%
Trying a new experience		84%	86%	88%	77%	81%
Enriching my relationship with my spouse partner children		75%	75%	78%	71%	76%
Having stories to share back home		72%	78%	76%	68%	61%
To stimulate your mind be intellectually challenged		70%	73%	65%	64%	76%
Learning more about history and local cultures		67%	72%	70%	46%	69%
Pursuing outdoor recreational activities		65%	71%	59%	69%	62%
Explore a different culture		64%	70%	62%	56%	63%
Pampering yourself		59%	57%	52%	69%	65%
Seeking out solitude and isolation		54%	53%	52%	47%	62%
Pursuing a hobby		53%	53%	57%	49%	51%
Challenging myself physically to feel physically energized		42%	39%	41%	40%	49%
Providing educational experiences for my children		40%	49%	31%	40%	38%

How important are each of the following factors when choosing the types of activities you do on a leisure trip? - Top 2 Box Summary Table



# Southerners Are Most Likely to Choose Their Destination Based on CH Activities but Are Least Likely to Label Themselves as CH Travelers

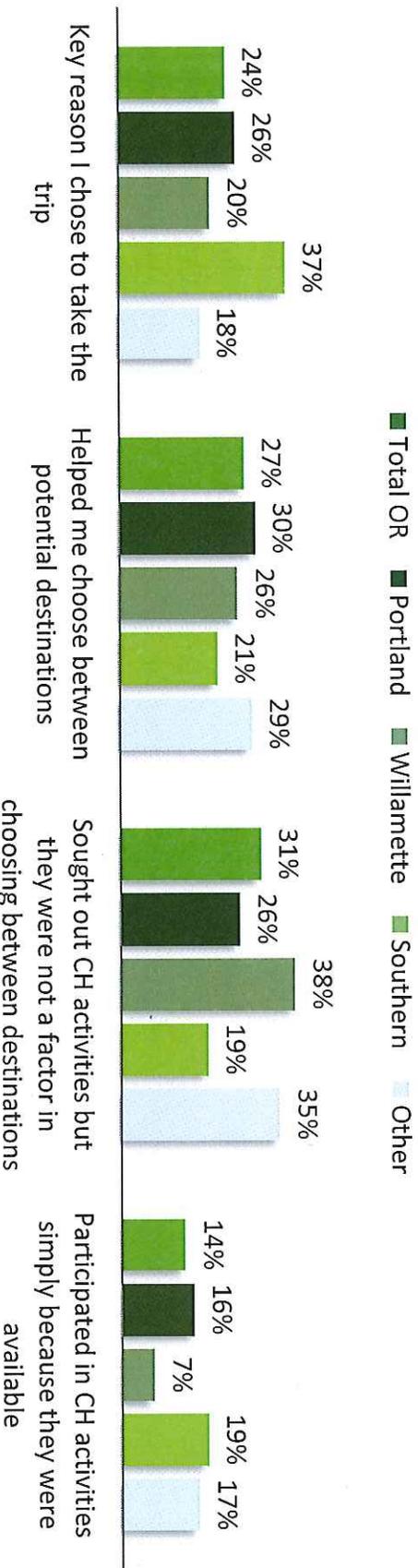
## How Well “Cultural Heritage Traveler” Describes Them



Conversely, those who reside in the four combined regions are most likely to identify with the term CH traveler but least likely to choose their destination based on the availability of CH activities and attractions but once at their destination, they seek these out.

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?

## The Role of CH Activities as Drivers of Destination Choice

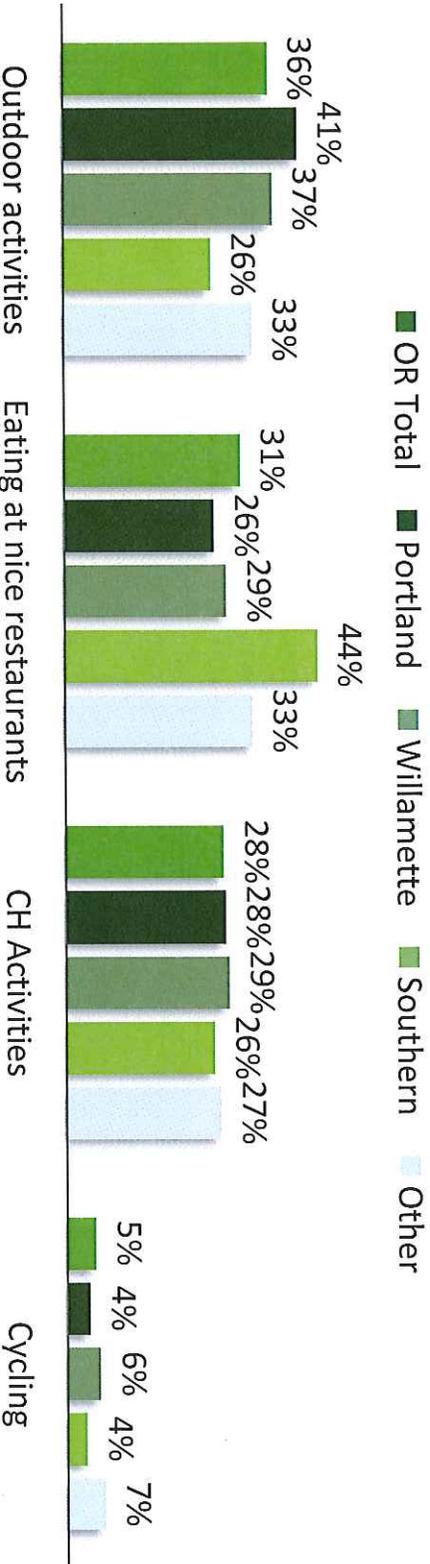


Now, thinking about all the trips you have taken over the *past three (3) years* in which you participated in cultural and/or heritage activities, which statement best describes you?

# For Portlanders, Being Outdoors is Most Important When Planning a Vacation, While for Southerners It's Nice Restaurants

Portland residents rank CH activities slightly ahead of eating in nice restaurants whereas for those from Willamette Valley, CH activities are equally as important as great dining. Southerners rank outdoor and CH activities as equally important when they are planning a vacation. For those in the four combined regions, outdoor activities and eating in nice restaurants appear to carry the same weight.

## Ranked #1 Most Important Factor



When planning your vacation which of the following is most important to you and which is least important? Please rank them in order 1 being most important, 4 being least important.

# For the Top Iconic Attractions, There is a High Degree of Awareness Across the Regions

Awareness	Sample Size	OR Total	Portland	Willamette	Southern	Other
Mt Hood		350	120	104	49	77
Crater Lake		94%	94%	98%	88%	91%
Oregon's public beaches		93%	94%	93%	99%	89%
The Oregon Trail		89%	90%	87%	96%	86%
Portland Rose Festival		89%	88%	92%	91%	84%
Columbia River Gorge		88%	92%	92%	81%	81%
Multnomah Falls		88%	89%	87%	86%	86%
Oregon Caves		86%	94%	87%	75%	78%
Coastal Lighthouses		82%	76%	85%	95%	77%
Oregon Wineries		79%	79%	84%	77%	75%
Timberline Lodge		79%	77%	83%	79%	77%
Oregon Shakespeare Festival Ashland		77%	87%	79%	66%	65%
Oregon Microbreweries		75%	74%	75%	89%	69%
Hay Stack Rock at Cannon Beach		74%	76%	76%	69%	73%
Portland Art Museum		71%	82%	71%	50%	67%
Pendleton Roundup		71%	81%	72%	60%	61%
Covered Bridges		68%	69%	68%	60%	72%
Fort Clatsop Lewis and Clark expedition		68%	55%	85%	79%	56%
Windsurfing in Hood River		62%	68%	65%	49%	57%
John Day Fossil Beds		62%	65%	61%	57%	62%
Bandon Dunes Golf Courses		60%	55%	63%	60%	61%
Cycle Oregon		50%	41%	56%	52%	55%
Smith Rock Bend		49%	49%	52%	33%	54%
Painted Hills		47%	44%	56%	32%	51%
		37%	34%	43%	18%	48%

For the most part, awareness of attractions closely tracks to the residential location of these respondents. The only exceptions are the state's most iconic assets.

Which of the following are you aware of in Oregon?



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# What is Most Representative Is Closely Associated With The Region In Which These Travelers Reside

Representative Rank 1*	Sample Size	OR Total	Portland	Willamette	Southern	Other
Oregon's public beaches	350	33%	27%	41%	35%	29%
Crater Lake	29%	29%	21%	34%	53%	21%
Mt Hood	24%	24%	33%	18%	19%	20%
The Oregon Trail	17%	17%	16%	15%	21%	18%
Columbia River Gorge	16%	16%	15%	14%	12%	23%
Multnomah Falls	14%	14%	18%	14%	5%	14%
Portland Rose Festival	12%	12%	18%	9%	7%	8%
Coastal Lighthouses	8%	8%	6%	11%	10%	6%
Timberline Lodge	6%	6%	10%	5%	2%	2%
Oregon Shakespeare Festival Ashland	5%	5%	3%	4%	9%	9%
Oregon Wineries	5%	5%	1%	8%	10%	4%
Oregon Microbreweries	5%	5%	4%	6%	0%	9%
Hay Stack Rock at Cannon Beach	5%	5%	11%	1%	3%	0%
Pendleton Roundup	4%	4%	3%	2%	0%	11%
Oregon Caves	4%	4%	4%	3%	13%	1%
Bandon Dunes Golf Courses	4%	4%	1%	2%	1%	11%
Fort Clatsop Lewis and Clark expedition	3%	3%	1%	5%	0%	6%
John Day Fossil Beds	2%	2%	0%	2%	0%	5%
Covered Bridges	1%	1%	1%	4%	0%	0%
Portland Art Museum	1%	1%	2%	1%	1%	0%
Smith Rock Bend	1%	1%	2%	1%	0%	1%
Painted Hills	1%	1%	0%	1%	0%	2%
Windsurfing in Hood River	1%	1%	2%	0%	0%	0%
Cycle Oregon	0%	0%	0%	0%	0%	1%

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? NOTE Rank #1 only



# Crater Lake Has a High Impact on Southerners, For all Others, Public Beaches are Most Impactful on Trip Planning

Impact Rank 1*	Sample Size	OR Total	Portland	Willamette	Southern	Other
Oregon's public beaches		350	120	104	49	77
Crater Lake		47%	45%	58%	41%	40%
Multnomah Falls		22%	18%	17%	54%	13%
Columbia River Gorge		15%	19%	16%	8%	11%
Coastal Lighthouses		14%	24%	8%	3%	16%
Mt Hood		13%	6%	20%	16%	12%
Oregon Wineries		12%	21%	6%	11%	9%
Oregon Microbreweries		11%	3%	13%	16%	19%
Hay Stack Rock at Cannon Beach		8%	4%	14%	8%	5%
Portland Rose Festival		7%	12%	7%	3%	2%
Oregon Shakespeare Festival Ashland		7%	8%	6%	3%	7%
The Oregon Trail		5%	5%	5%	4%	8%
Oregon Caves		5%	6%	4%	3%	5%
Bandon Dunes Golf Courses		4%	4%	2%	10%	4%
Portland Art Museum		4%	4%	1%	2%	10%
Painted Hills		4%	5%	3%	5%	2%
Covered Bridges		3%	1%	2%	3%	9%
Pendleton Roundup		3%	2%	3%	2%	6%
Timberline Lodge		3%	1%	3%	2%	6%
Fort Clatsop Lewis and Clark expedition		3%	3%	4%	3%	0%
Smith Rock Bend		2%	3%	2%	0%	2%
John Day Fossil Beds		2%	1%	3%	1%	3%
Cycle Oregon		2%	2%	0%	0%	6%
Windsurfing in Hood River		1%	1%	2%	0%	3%
		1%	2%	1%	0%	1%

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? NOTE: Rank 1 only

