

Oregon Cultural and Heritage Travelers Study

November, 2012



Mandala Research, LLC
Insights • Strategy • Results

Table of Contents

5	Background and Objectives
6	Research and Methodology
9	Overview: Cultural & Heritage Traveler Segments
11	Summary and Insights
17	Cultural and Heritage Travelers vs. Non-Cultural and Heritage Travelers
18	Demographics
22	Travel to and within Oregon
29	Cultural and Heritage Awareness
34	Activities
42	Drivers of Destination Choice
45	Booking Behavior
48	Travel Party Composition
50	Trip Characteristics
54	Spending
56	Future Travel
59	Information Sources
61	Publications Read
65	Online Sources and Social Media
68	Cultural & Heritage Travelers: Segmentation
69	Demographics
75	Trip Frequency
79	Cultural and Heritage Awareness
82	Awareness and Knowledge of Oregon
92	Activities



Table of Contents

99	Cultural and Heritage Travelers: Segmentation (continued)
	Behaviors & Motivators
103	Trip Planning
106	Booking Behavior
110	Travel Party Composition
113	Length of Stay
117	Mode of Transportation
119	Recent Trips
122	Accommodations
126	Spending
129	Economic Impact
131	Online Sources and Social Media
140	Future Travel
146	Cultural and Heritage Geographic Results
147	Demographics
154	Oregon Economic Impact
155	Cultural and Heritage Awareness
160	Awareness and Knowledge of Oregon
170	Activities and Drivers of Destination Choice
176	Behaviors and Motivators
179	Trip Planning
184	Booking Behavior
187	Trip Characteristics
195	Spending
198	Future Travel
203	Information Sources



Table of Contents

207	Cultural and Heritage Geographic Results (Continued)
	Publications Read
	Oregon Regional Results
214	Regions Analyzed within Oregon
215	Greater Portland Summary and Key Findings
217	Willamette Valley Summary and Key Findings
219	Southern Region Summary and Key Findings
221	All Other Regions Summary and Key Findings
223	Distance Traveled and Number of Overnights
224	Activities: Differentiation Among Regions in Participation and Perception
230	Spending
231	Behaviors and Motivators
233	CH as Driver of Destination Choice and Definition of These Travelers
235	Oregon Attractions



Background & Objectives

Research Objectives:

- **Understand** how travelers think about cultural/heritage travel: how they define it and how they define themselves as travelers;
- **Identify** the range of cultural/heritage traveler “types” through segmentation;
- **Understand** the behaviors of the cultural/heritage leisure traveler;
- **Learn** what is important to cultural and heritage travelers and their attitudes toward travel;
- **Quantify** the economic impact of the cultural/heritage leisure traveler;
- **Compare** 2009 National Study of Cultural/Heritage Travelers to Oregon travelers in 2012.



Research Methodology

The Cultural and Heritage Traveler study was conducted among 2000 leisure travelers in the Markets defined by Visit Oregon from August –September, 2012. The data was collected online using Mandala Research's *Travel Answer* domestic leisure travel panel, hosted by Conduit Systems.

To qualify for the survey, respondents must have taken at least one trip in the past 12 months for pleasure, vacation or personal purposes within the United States that was 50+ miles away from home one-way OR where the traveler spent at least one overnight and have shared or have sole responsibility for travel planning.

The sample for the survey was balanced by age, gender, race and ethnicity according to the latest population parameters reported by the U.S. Census Bureau while simultaneously being adjusted for known response rates among these demographics within the online panel. The advantage of this methodological approach is that the incidence of leisure traveler can be extrapolated from each demographic segment versus only the population as a whole.

Reported results may not equal 100% due to rounding and exclusion of Don't Know/Rather Not Say response options.



Research Methodology (Continued)

In survey research, the entire population is typically not interviewed, but rather a sample of the population is polled. Therefore, the data are subject to sampling error. The maximum sampling error of the data for the total sample of 2000 interviews is +/- 2.2 percentage points at the 95% level of confidence. However, the sampling error will vary as subgroups of differing sample sizes are examined throughout this report. Sampling errors are shown below for the total sample.

	Sampling Error						
Total Sample	If the percentage found is around:	50%	40% or 60%	30% or 70%	20% or 80%	10% or 90%	1% or 99%
n=2000	Then the sampling error in percentage points would be +/-:	2.2	2.2	2.0	1.6	1.2	0.96

For example, if a question asked among the total sample yielded a response with a percentage of 99%, then we can be sure 95 out of 100 times that the true percentage point in the population would lie between 98.4% and 99.6% (99% equals +/- .96 percentage points).



Research Methodology (Continued)

For the purpose of this study we have the following definitions:

- Leisure Travelers: Travelers who have taken at least one trip in the past 12 months for pleasure, vacation or personal purposes within the United States that was 50+ miles away from home one-way OR where the traveler spent at least one overnight and has shared or sole responsibility for travel planning.
- Cultural and/or Heritage Leisure Travelers (CHT): 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.

Sample sizes for the population segments mentioned in this report are outlined below. 2012 data is broken down below, as follows:

- Leisure Travelers (Total Sample): n=2000
- Total Cultural/Heritage Travelers n=1662
- Non Cultural/Heritage Leisure Travelers: n=338
- Keeping It Light Cultural/Heritage Leisure Travelers: n=299
- Self-Guided/Accidental Cultural/Heritage Leisure Travelers: n=245
- Aspirational Cultural/Heritage Leisure Travelers: n=327
- Well Rounded/Active Cultural/Heritage Leisure Travelers: n=446
- Passionate Cultural/Heritage Leisure Travelers: n=345
- Oregon Travelers: n=350, Oregon Cultural/Heritage Travelers: n=292
- Tier 1 Travelers: n=1350, Tier 1 Cultural/Heritage Travelers: n=1116
- Tier 2 Travelers: n=300, Tier 2 Cultural/Heritage Travelers: n=254



Overview: Cultural and Heritage Traveler Segments

The five segments that emerge among leisure travelers were based on the level of influence cultural/heritage activities played in their travel decisions. The segments are mutually exclusive and collectively exhausted. The five segments are outlined below:

Passionate Cultural/Heritage Leisure Travelers: Leisure travelers that seek out cultural/heritage activities. They have a strong desire to participate in cultural and historical activities while on a leisure trip.

- 14% of leisure travelers or 21.4 million national leisure travelers (2009)
- 17% 2012 Oregon Sample

Well Rounded/Active Cultural/Heritage Leisure Travelers: Leisure travelers that are open to experiencing all types of activities while on a leisure trip, including cultural and/or heritage activities.

- 12% of leisure travelers or 18.4 million national leisure travelers (2009)
- 22% 2012 Oregon Sample

Aspirational Cultural/Heritage Leisure Travelers: Leisure travelers who desire to experience and participate in cultural/heritage activities, but have limited experiences with cultural activities during their most recent trip and during the past three years.

- 25% of leisure travelers or 38.2 million national leisure travelers (2009)
- 16% 2012 Oregon Sample

Self-Guided/Accidental Cultural/Heritage Leisure Travelers: Leisure travelers who take advantage of cultural/heritage activities while on a leisure trip, but cultural/heritage activities aren't the driver for their destination choices. They most often prefer exploring small towns, galleries and self-guided historical tours.

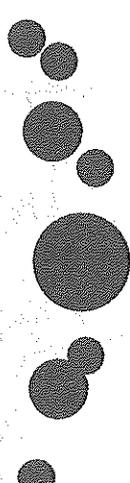
- 14% of leisure travelers or 21.4 million national leisure travelers (2009)
- 12% 2012 Oregon Sample

Keeping it light Cultural/Heritage Leisure Travelers: Leisure travelers that don't seek out cultural/heritage activities but will attend what they perceive as fun art, cultural and musical events.

- 12% of leisure travelers or 18.4 million national leisure travelers (2009)
- 15% 2012 Oregon Sample

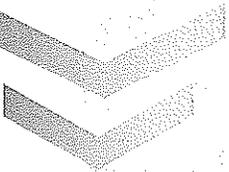


Oregon Markets Have More CH Travelers AND They Spend More



47.5M people are C&H
Travelers within OR and
feeder markets

Oregon C&H
Travelers spent
\$1,618 per trip
compared to
\$1,072 (2012
dollars) for
National C&H
Travelers



Total: \$115.2
billion
attributable to
C&H Travelers
for OR and its
feeder markets

Market Size

KEY FINDINGS

Economic Impact

- 1 Spend of C&H travelers in Oregon's target markets is greater than spend of C&H travelers nationally (according to 2009 national data), by almost 60%!
- 2 83% of Oregon markets are CH travelers compared with 78% for the Nation. 17% of these travelers visited Oregon on their most recent trip contributing an estimated \$19.6 billion to the state economy.
- 3 Oregon's target markets include Canada, combined with the US feeder markets, represents about 40% of the National market.
- 4 Oregon has much more "tuned in" C&H travelers in its region – which has tremendous potential for its cultural, heritage, and arts institutions.



Summary and Insights

- This study for Oregon includes a total of 1662 travelers that were identified as cultural and heritage travelers and a total of 338 non cultural and heritage travelers. Using our definition, nearly three-fourths of our sample identify with being a cultural and heritage traveler.
- While we have a definition of Cultural and Heritage Traveler as professionals in the field, the public's perception is broader and can play well into Oregon's branding and positioning.
- Overall, Oregon has a great deal to offer both cultural and heritage of travelers: a wide variety of activities and attractions, a richness of experience which includes nature activities; cultural and heritage activities; and sophisticated dining and shopping. By presenting the great diversity of cultural and natural resources, Oregon has the opportunity to gain a larger share of the cultural and heritage tourism market as well as more frequent "repeat" visitors. It is a place that travelers can "call their own" and where they feel both comfortable and engaged.
- The segment of cultural and heritage traveler where this applies most are "well-rounded and active" travelers; this segment makes up nearly one-quarter of the cultural and heritage travelers in this study. They are as likely to be on a zip line as they are to be at the symphony, enjoying a great culinary experience or reveling in the local fare. Their willingness to engage in the local scene by far surpasses the other segments.



Summary and Insights

- As cultural heritage travelers like to engage in a range of activities—everything from culture to nature outings—they also like to partake of regional foods and wines, appreciating the authenticity of what Oregon has to offer.
- Traditional cultural assets, such as the Oregon Trail, Mt. Hood and Crater Lake are deeply embedded in the minds of both types of travelers. These same historical and traditional assets are those that most closely represent Oregon in the minds of the traveler. It is important for Oregon to capture the past sense of place but to weave this iconic past into the present and future.
- Both cultural and heritage and non cultural and heritage travelers are traveling further in 2012 to get to their destination than in the 2009 National Study and more are also flying than in 2009. While this is good news, it also means that expectations of the destination may be somewhat higher than in previous years.
- It is noteworthy that the opportunity exists to leverage the natural assets of the state while embedding them into contemporary life for two of Oregon’s greatest attractions: Oregon wineries and microbreweries. Oregon wines have become extremely popular in the last several years and rival those from California and Washington State. Oregon has continued this heritage of trailblazing and continues enhancing the unique identity of the state.
- Cultural and heritage travelers have very broad interests in attractions and activities. In addition to cultural and heritage activities, they equally enjoy eating at nice restaurants and partaking of outdoor activities.
 - Dining is fundamental. In fact, fine dining experiences are even more important to non-cultural and heritage travelers. However, experiencing local cuisine and partaking of the unique and authentic culinary experience is far more important to cultural and heritage travelers.



Summary and Insights

- Oregon's public beaches are a great asset and they are cited by both Cultural and Heritage and general market travelers as being the most impactful reason when planning a trip to Oregon. Crater Lake and the Columbia River Gorge have a slightly greater impact on non CH travelers than on CH travelers.
 - Well over half of the Passionates are aware of Oregon's public beaches
 - For them, as well as Keeping it Light travelers, Oregon's public beaches have the biggest impact on their trip planning
- Across the segments, the Passionates have been most likely to have taken a vacation in the last 12 months. It is likely that the vacation included a scenic drive as they are the most likely of the segments to have participated in that activity. This is a unique opportunity for Oregon to capture these travelers along the way as well as at their destination.
- A great opportunity exists for the State to promote activities and attractions locally as more cultural and heritage travelers are selecting specific events, attractions and activities once they arrive at their destination rather than considering specific events as a first step in selecting the destination. Not only is it important to inform travelers of their options for activities and attractions before they arrive, but also when they arrive on Oregon's doorstep.
- Those who we identified as cultural and heritage travelers are more likely than non cultural and heritage travelers to combine business and leisure trips, and their trips, in general, are longer. Also, cultural and heritage travelers tend to travel with a larger sized party and more household members and more likely to take vacations and visit friends.
 - Over half of the Keeping it Lights and Self-guided segments are most likely to combine leisure and business on the vast majority of their trips
 - Attracting these people to return for a leisure trip should not be difficult



Summary and Insights

- Cultural and heritage travelers are more likely to partake of week long trips (versus general market travelers, who tend to take long weekends) with a result that they are spend more than their counterparts in 2012 as well as those in the 2009 National Study. In the big categories of transportation, meals and shopping, CH travelers considerably outspend their counterparts.
- Communicating with cultural and heritage travelers will be most effective if done via technology (social media and internet sites) as cultural and heritage travelers are committed and long term users of the internet (specifically Facebook, Google and YouTube) and Facebook and YouTube for social networking sites. At present, YouTube is the largest video sharing site in the world and it exceeds over 2 billion views a day. Marketers and advertisers are using YouTube to reach “the masses” cheaper and faster than ever before. Cultural and heritage travelers also use word-of-mouth, in large part through Facebook, to showcase and share their travels.
 - More Passionates gather their information from destination websites, family and friends and general web searches
 - They also read user generated sources more so than any other segment
 - The Passionates are also much more likely to read community newspapers
 - The Well-Rounded/Actives and Passionates are far more likely to use Trip Advisor than the other segments
- Given your website’s high utilization of social media, sponsoring a contest for travelers to make YouTube videos of user generated content to share with their family and friends will likely be enticing to new and old travelers alike to the state.
- Additionally, providing a QR code on the Oregon website, that can be downloaded to a smart phone, allows travelers to be more spontaneous and flexible in partaking of attractions and events.
- Search engine optimization is also a good investment for this technology savvy group.



Summary and Insights

- In terms of trip planning, both groups are generally booking their trips up to 30 days prior to their departure. Interestingly, while travelers are planning their trips via destination websites, they are much less likely to book them using this vehicle. This includes both accommodations and activities. This presents an ideal opportunity to increase website visibility and make booking efficient and engaging.
- Twice as many of the Well-Rounded/Active travelers book all aspects of their trip including airlines, other transport, activities and accommodations than other segments.
- While cultural heritage travelers are more likely to spend more overnights than general market travelers, they both have similar taste in accommodations. Cultural and heritage travelers are *slightly* more likely to stay at independent properties. However, the one cultural and heritage designated property we asked about, had a fairly low rate of recognition. Historic properties, such as Timberline Lodge, are not well represented in the minds of any of the travelers.
- Nine out of 10 cultural and heritage travelers report they are very or somewhat likely to take a leisure trip in the next 12 months and three-quarters of the cultural and heritage travelers (compared to one-half of the non cultural and heritage travelers) would consider a trip to Oregon in the next 12 months. While most are beguiled by the Oregon coastline and the natural beauty of the state, a fair number of travelers cite the economic recession as a chief barrier in being able to travel. However, this may be a great opportunity for Oregon to offer less expensive packages, keeping in mind that cultural and heritage travelers have a great desire to explore and learn about local cultures. Other research conducted by Mandala indicates that stay vacations are on the decline; going short distances still give travelers a sense of having taken a holiday.

Summary and Insights By Market Tiers

- For purposes of this study Tier 1 (or Primary Markets) were identified as: Oregon, Idaho, Alberta, Utah, Northern California, Vancouver, BC, Washington; Tier 2 (or Secondary Markets) were identified as Southern California and New York.
- Among all tiers, Tier 2 travelers are most likely to take a Culture and Heritage trip in the next 12 months (nearly three-quarters of all travelers surveyed indicated an interest in taking a trip to Oregon in the next year). An opportunity exists to make those travelers in Tier 2 more aware of the icons in Oregon and to make all travelers aware of the diversity of both classic and trendy activities. Even raising awareness of Tier 2 travelers to equal that of Tier 1 travelers will be a great improvement.
- For all these reasons, we recommend that Heritage Oregon and the Arts Commission find ways of exposing the richness of Oregon to Tier 2 travelers. As a reminder, these are travelers from New York and Southern California who crave the undiscovered and are sophisticated when it comes to dining, culture, and the arts. While Tier 2 respondents are more likely than those in Tier 1 or Oregonians to appreciate the landscape and coastline of Oregon, raising awareness of Oregon's beaches, wineries and incredibly diverse culinary scene will help draw more of these travelers to Oregon.
- At the same time, we recommend giving more attention to Oregonians who are keenly aware of the richness and diversity of tourism assets in their own state, and who enjoy exploring these destinations and sites as well travelers from Washington State. We suggest that you provide discounts and packages that enable in-state travelers to explore in their own back yards. This tactic will not only be effective in keeping these travelers in the state but will also help spread, through word-of-mouth, the variety of activities and attractions that Oregon has to offer.

