Oregon Cultural and Heritage Travelers Study
Main Street Conference
Preliminary Findings
September, 2012

Sponsored by: Oregon Heritage Commission, Oregon Arts Commission, & Travel Oregon

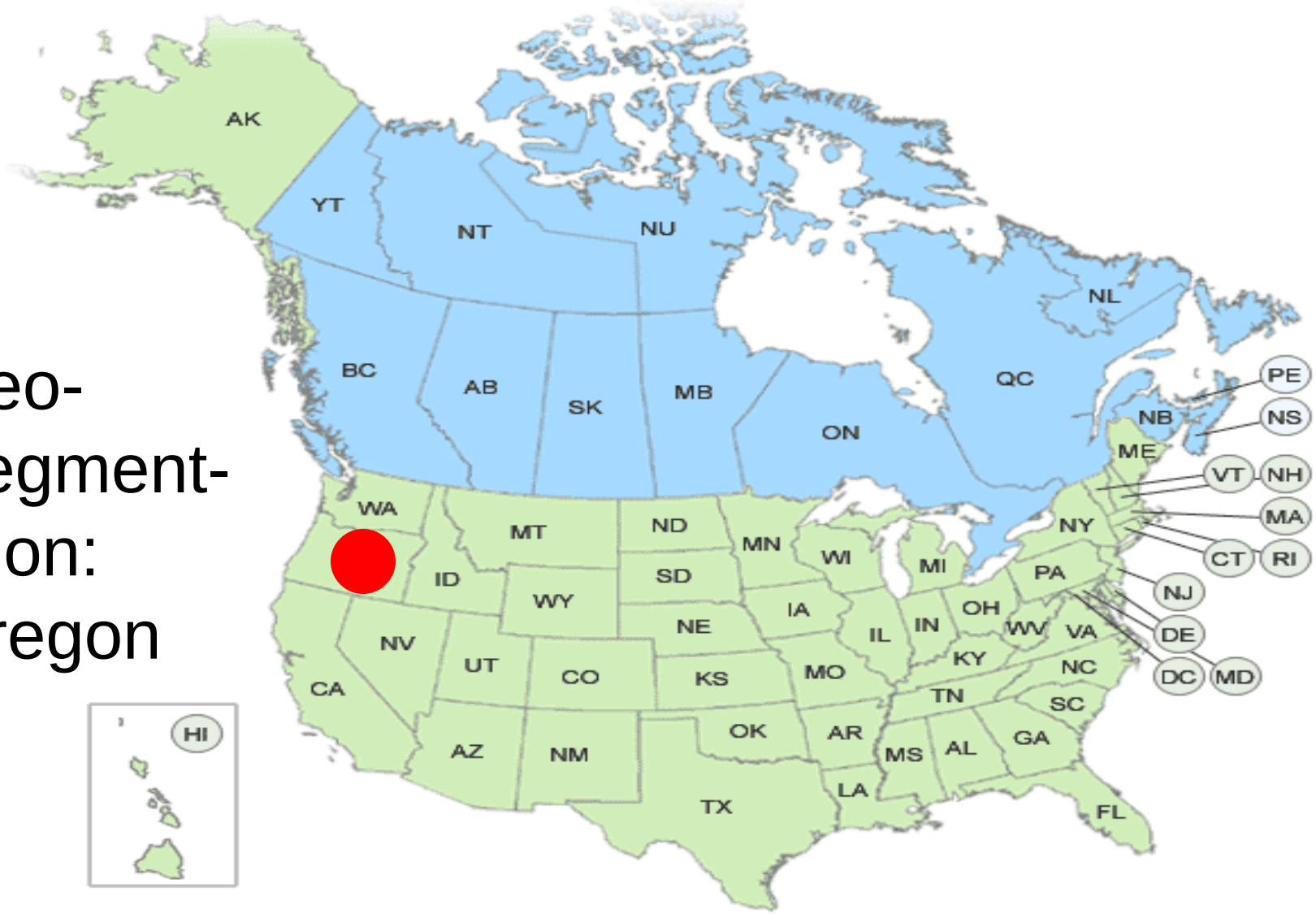
Mandala Research, LLC
Market Research, Management Consulting

EXIT 4
Downtown

SIXTH STREET
HISTORIC DISTRICT
E. 6TH STREET
(PECAN ST.)
100

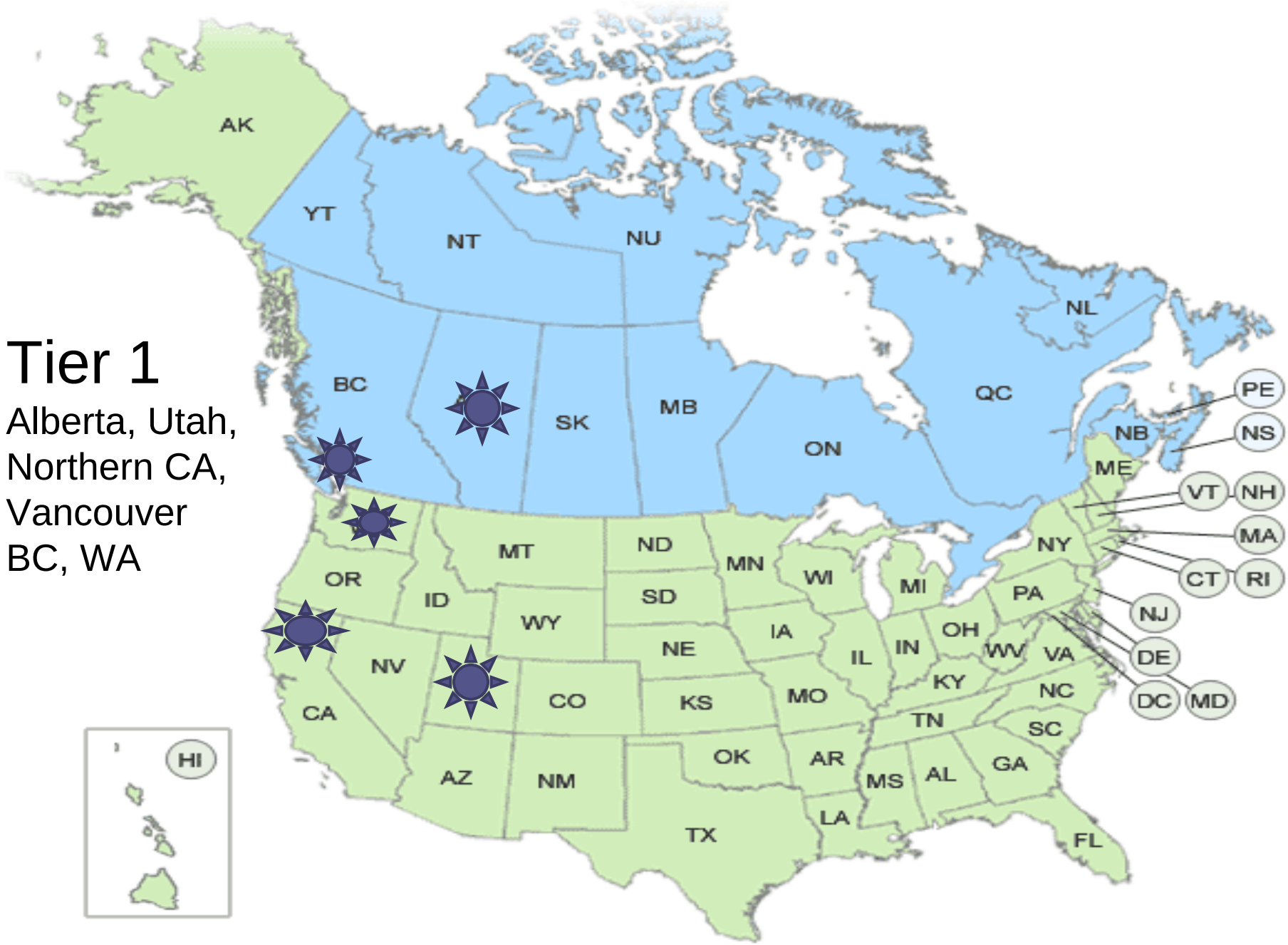
ARTS DISTRICT

Geo-Segment-ation: Oregon



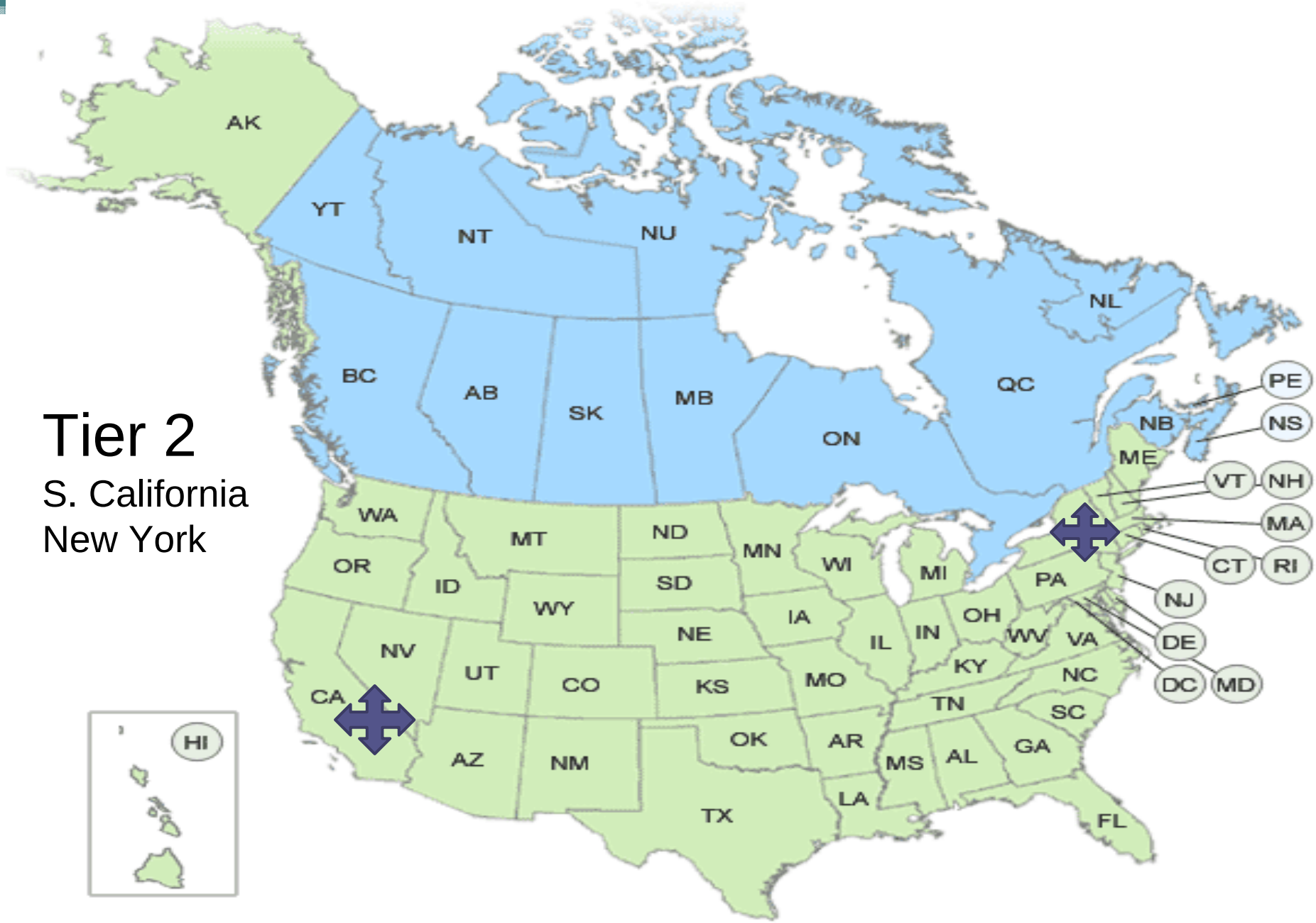
Tier 1

Alberta, Utah, Northern CA, Vancouver BC, WA

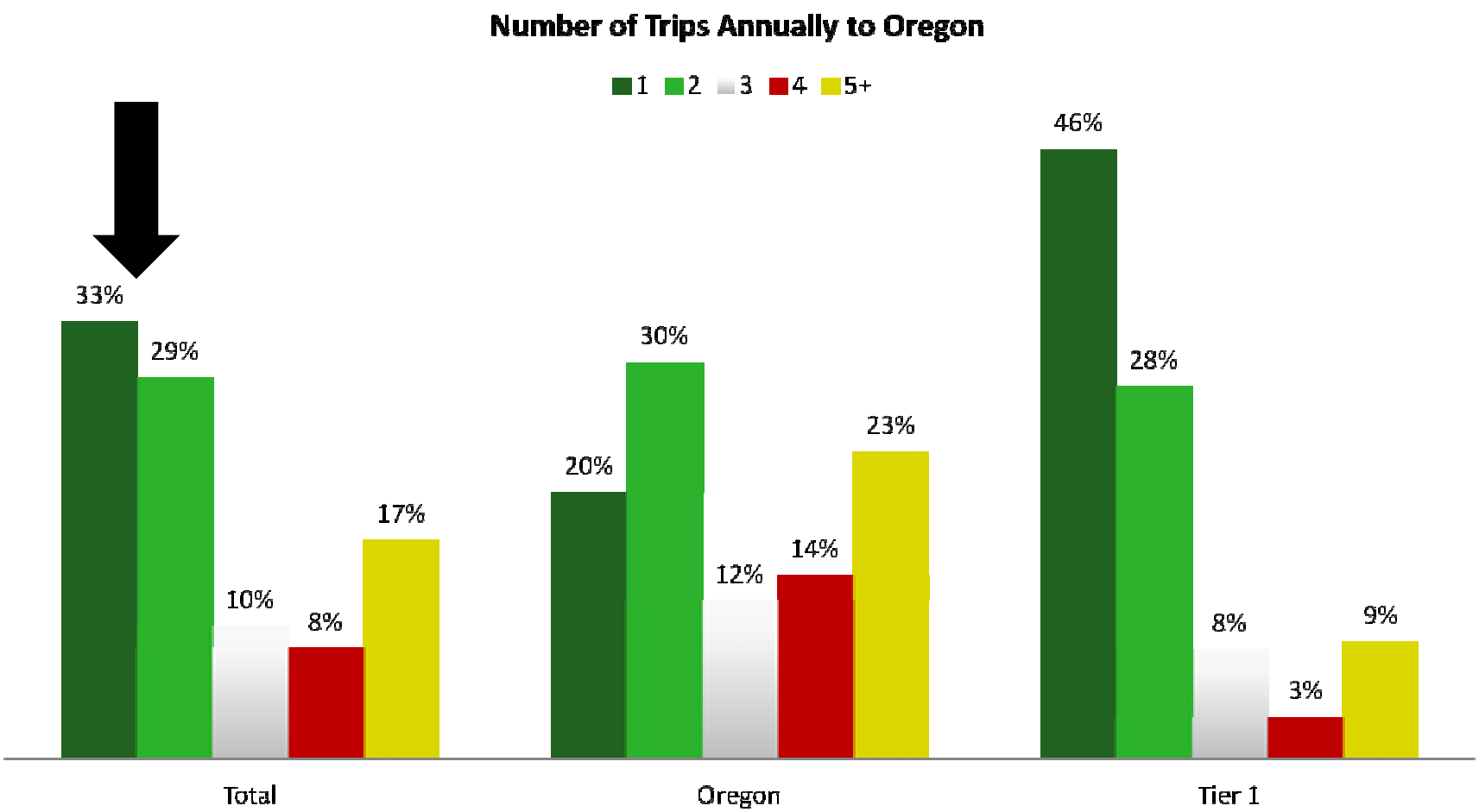


Tier 2

S. California
New York



Those From Tier 1 States and Provinces Are Most Likely to Take at Least One Leisure Trip Per Year to Oregon



Q9b. How many trips for leisure do you take each year in the state of Oregon?
Base: those who visited Oregon on most recent leisure trip (n=348)

Profiles

5 Profiles of Cultural/Heritage Travelers

These five profiles were based on the level of influence cultural/heritage activities played on their travel decisions.

1. Well Rounded/Active (22% of total sample)
2. Passionate Seekers (17% of total sample)
3. Aspirational (16% of total sample)
4. Self-Guided/Accidental (14% of total sample)
5. Keeping it Light (12% of total sample)

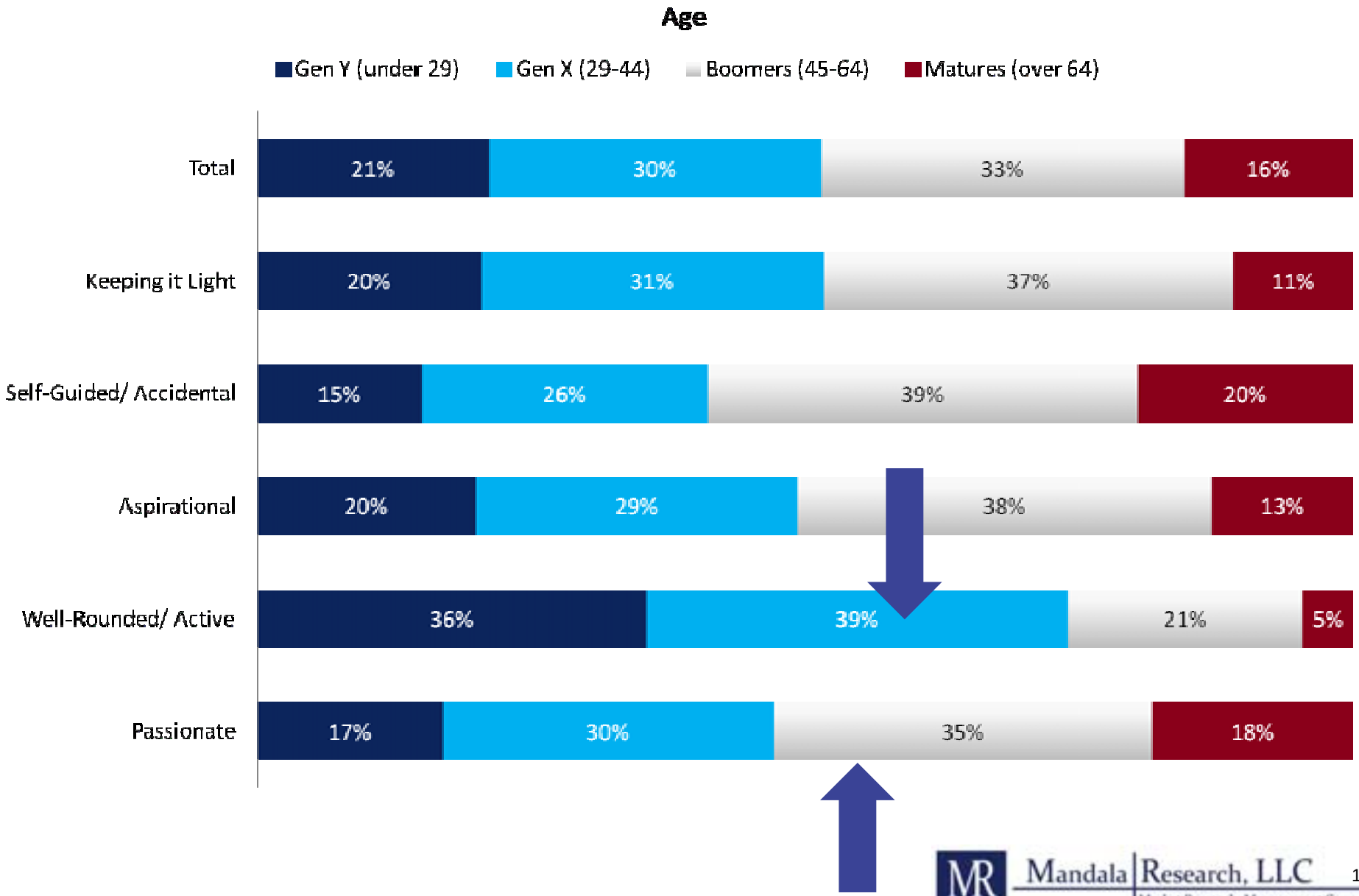
How Well Does A Cultural/Heritage Traveler Describe You?

82% of Passionate Seekers of cultural/heritage leisure travel say that the cultural/heritage definition describes them well.

91% of Well Rounded/Active leisure travelers also indicate this definition describes them as well.

Base: Cultural/Heritage leisure travelers n=815
Note: Definition of Cultural/Heritage leisure traveler: 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.
36. 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?

Segment Demographics



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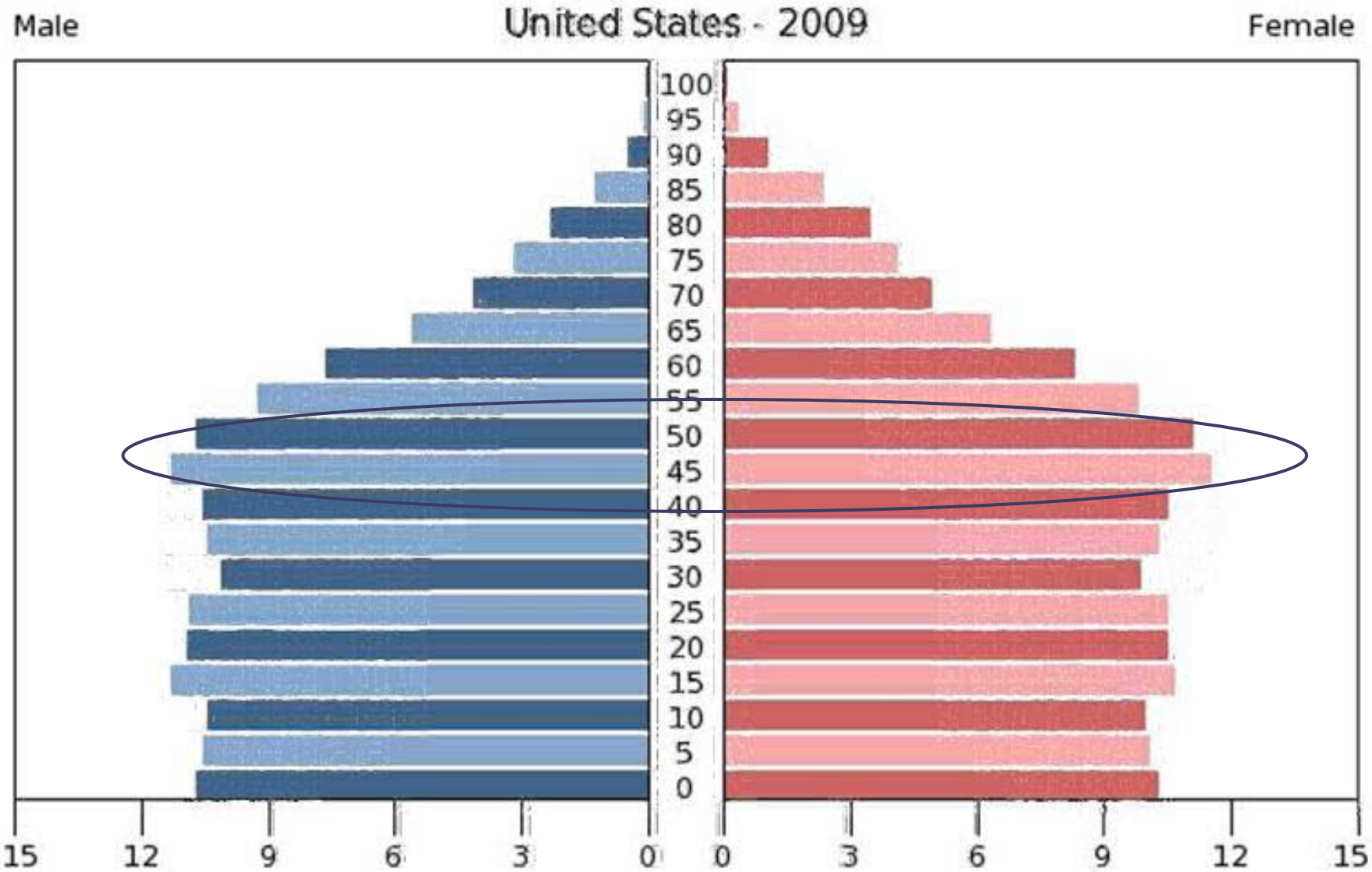
Male
United States - 2009
Female
100
95
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85
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3
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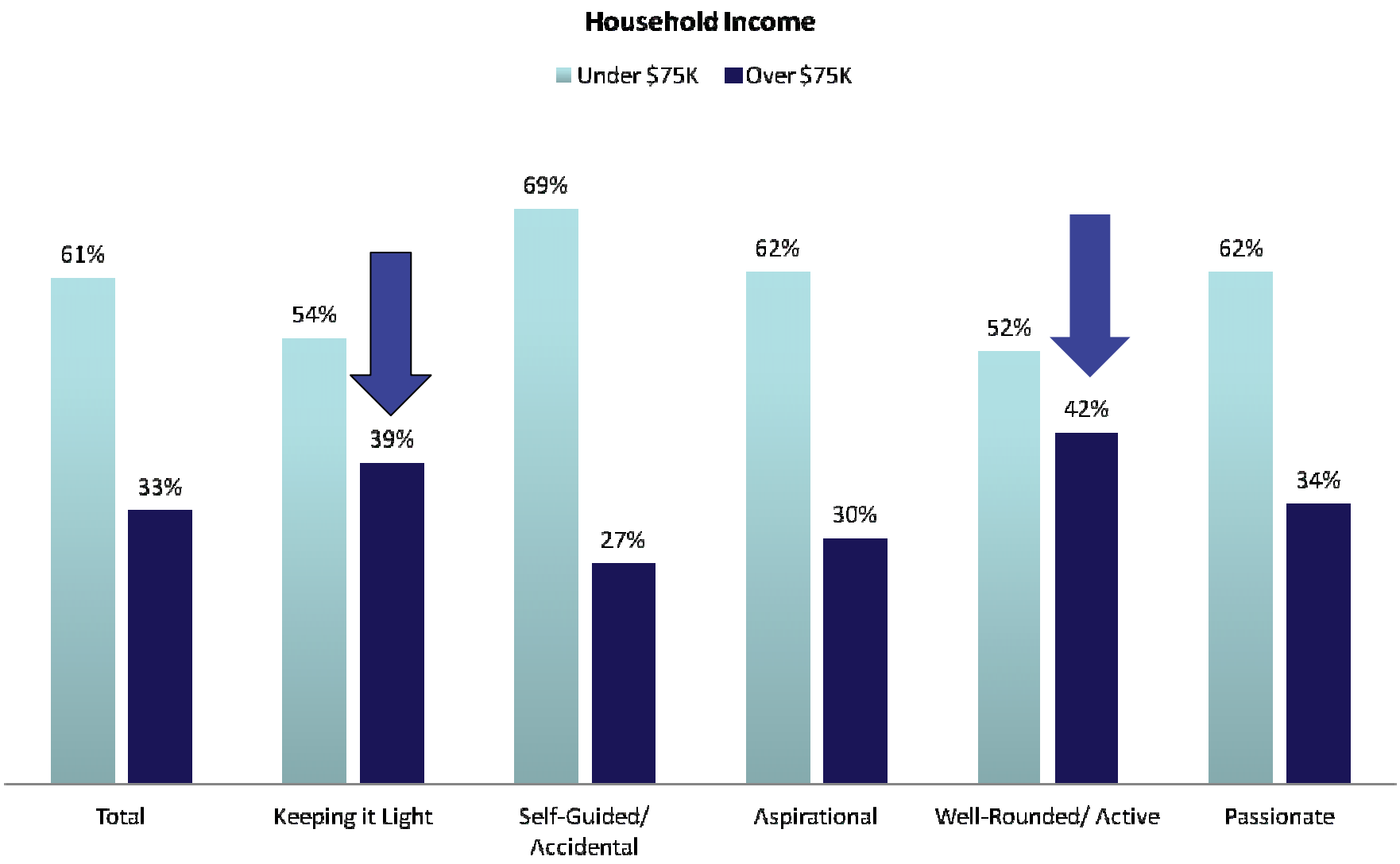
12
15

Segment Demographics (Continued)



Passionate Cultural/Heritage Traveler

Passionate:

Have a strong desire to participate in cultural and historical activities while on a leisure trip.

- 14% in 2009 (National sample)
- 17% in 2012 (Oregon sample)

The Well Rounded/Active Leisure Travelers

Well Rounded/Active: Experiencing all types of activities while on a leisure trip, including cultural and/or heritage activities.

- 12% in 2009 (National sample)
- 22% in 2012 (Oregon sample)

Self-Guided/Accidental: Taking advantage of cultural/heritage opportunities when discovering them but not a driver for the trip. They most often prefer exploring small towns, galleries and self-guided historical tours.

- 14% in 2009 (National sample)
- 12% in 2012 (Oregon sample)

Aspirational: Desirous of the cultural and heritage experience but have had only limited exposure during their most recent trips.

- 25% in 2009 (National sample)
- 16% in 2012 (Oregon sample)

Keeping it light: Won’t seek out cultural/heritage activities, but will attend what they perceive as fun artsy, cultural and musical events. (Usually over a long weekend).

- 12% in 2009 (National sample)
- 15% in2012 (Oregon sample)

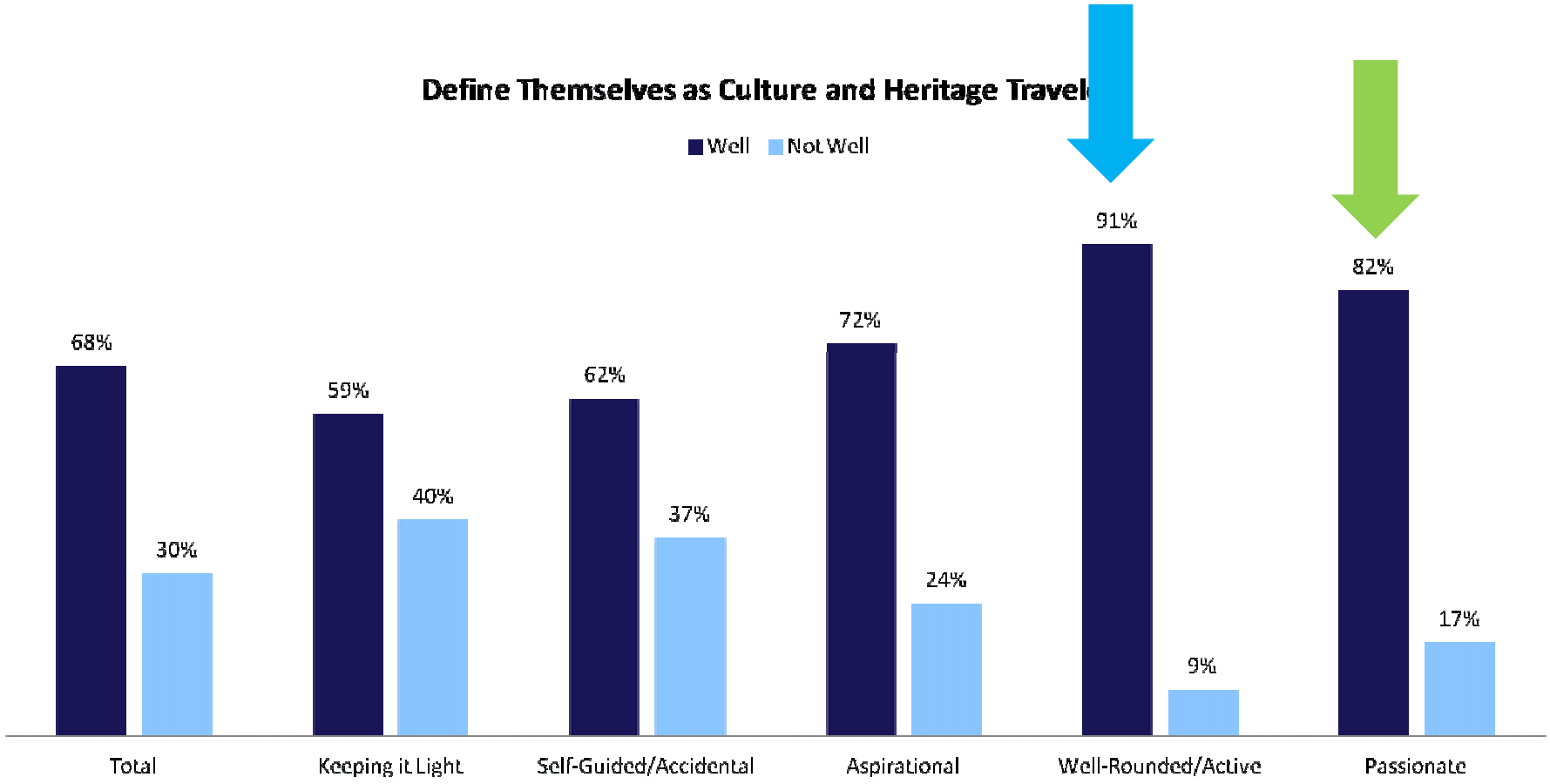
Top States Visited by These Respondents Ranks Oregon 4th

As this sample is primarily West Coast based, New York and Florida rank lower than national surveys done

States Visited on Most Recent Trip	Total	Oregon	Tier 1	Tier 2
Sample Size	2000	350	1350	300
California	28%	26%	28%	29%
Washington	21%	26%	24%	4%
New York	18%	12%	19%	18%
Oregon	17%	47%	12%	4%
Idaho	11%	7%	14%	2%
Utah	10%	6%	12%	5%
New York	9%	4%	7%	22%
Florida	8%	6%	7%	14%
Arizona	7%	4%	7%	10%
Montana	7%	3%	9%	2%
Hawaii	7%	7%	6%	8%
Colorado	5%	4%	5%	5%
Texas	5%	4%	4%	6%

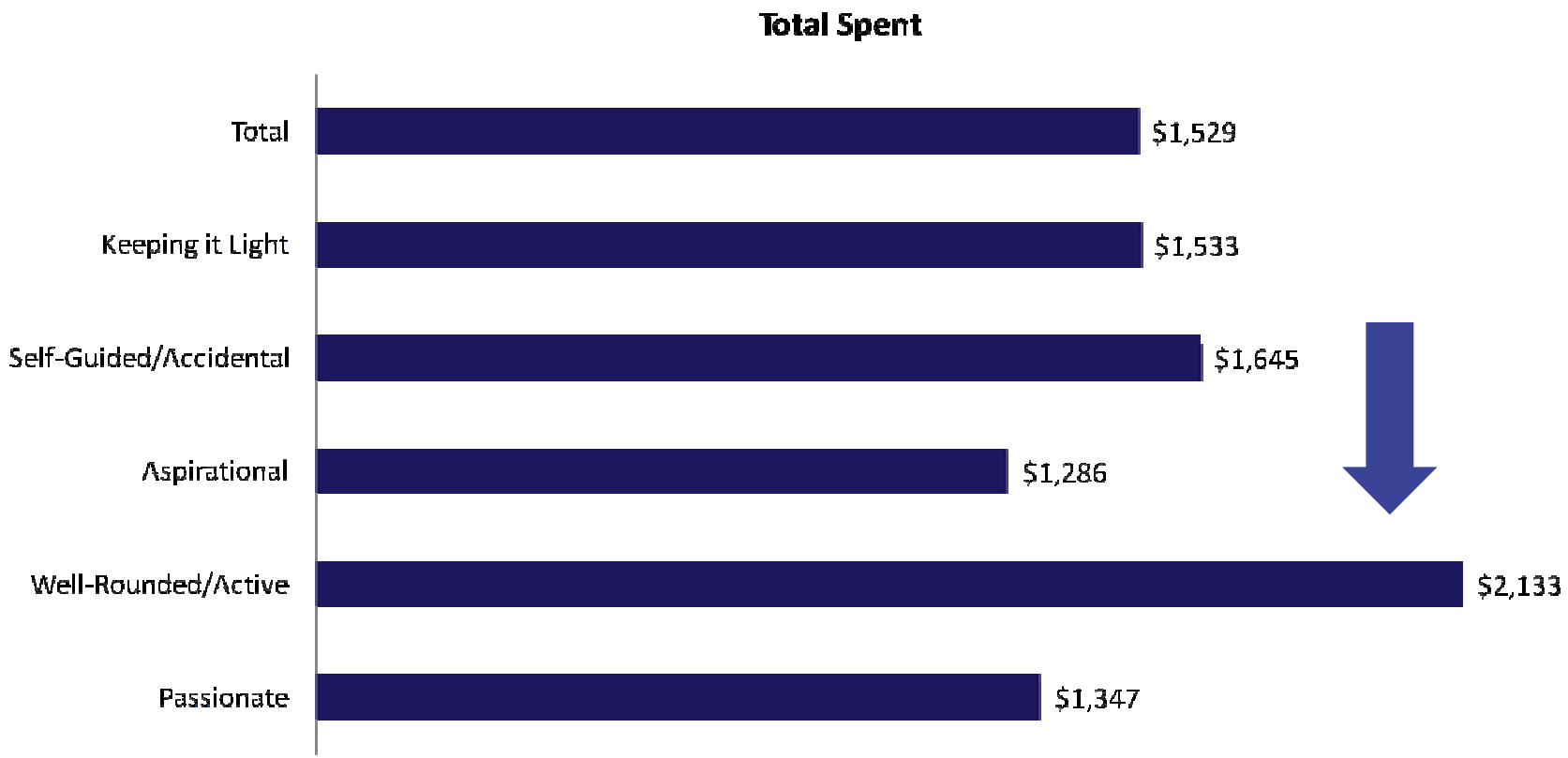
Q9. Thinking about your **most recent trip**, what state(s) did you visit?

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

Well-Rounded, Active Travelers Spend 70% More on Their Trip



Q21A. [TOTAL SPEND] About how much would you say you, personally, spent in total on this most Recent trip (including transportation, lodging, entertainment, food and dining expenses, etc.). Please include spending on items that you paid for even if they were for other people.

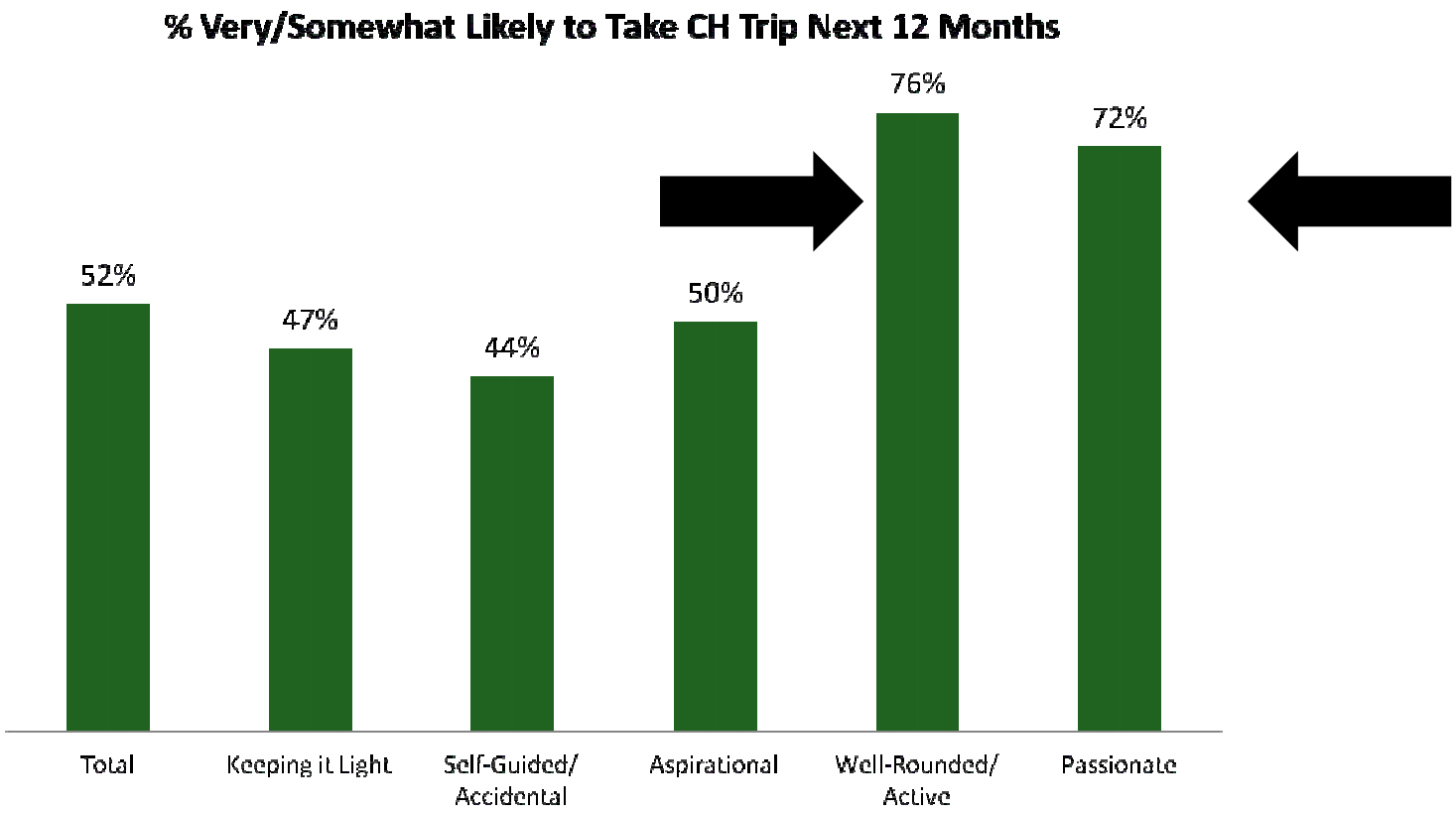
45% of Oregonians deliberately explored a small town on their last trip

If You Want Travelers to Help Spread Your Message, Look to the Well-Rounded/Actives for Assistance

Social Networking Sites	Total	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded/Active	Passionate
Sample Size	1998	299	244	327	446	345
Facebook.com	77%	78%	70%	76%	84%	82%
Youtube.com	43%	47%	37%	34%	61%	47%
Twitter.com	19%	18%	13%	16%	31%	22%
Google.com	18%	20%	9%	16%	29%	20%
Pinterest.com	13%	14%	8%	13%	19%	16%
LinkedIn.com	12%	15%	9%	13%	16%	13%
Yelp.com	6%	7%	3%	4%	11%	6%
Instagram.com	6%	7%	2%	3%	13%	5%
Flickr.com	5%	6%	1%	3%	10%	4%
FourSquare.com	3%	3%	1%	3%	8%	2%
Vimeo.com	3%	3%	1%	2%	7%	1%
Other please specify	9%	8%	13%	9%	2%	8%

Q34. Which of the following social networking sites do you use on a regular basis?

Well-Rounded and Passionate Segments Are Most Likely to Take CH Focused Trip in Near Future



Q39. How likely are you to take a cultural and/or heritage trip in the next 12 months?

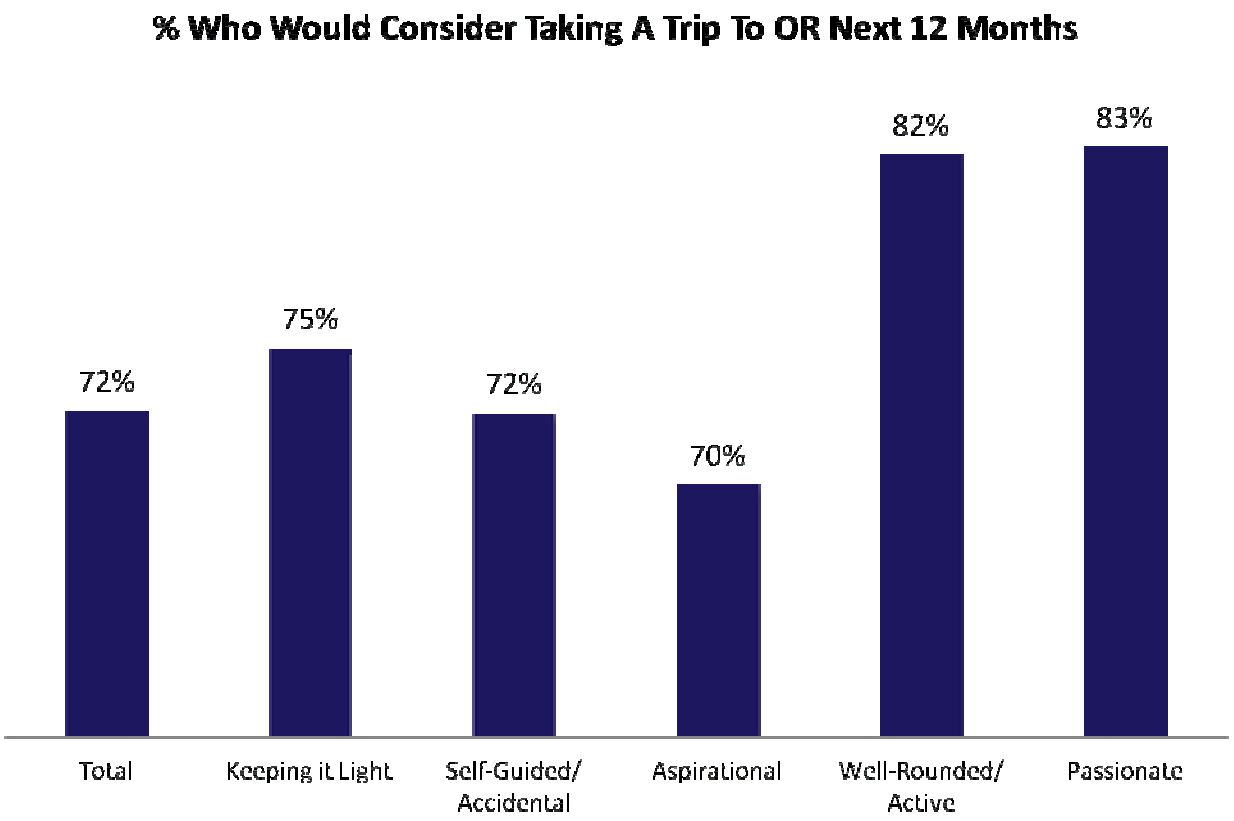
Awareness Of Oregon Icons is Consistent Across Segments

Awareness of Oregon Icons	Total	Keeping it Light	Self-Guided/ Accidental	Aspirational	Well-Rounded/ Active	Passionate
The Oregon Trail	61%	63%	68%	57%	57%	70%
Mt Hood	58%	63%	64%	51%	48%	68%
Crater Lake	54%	54%	59%	48%	48%	64%
Columbia River Gorge	46%	50%	52%	42%	37%	53%
Oregon's public beaches	43%	46%	50%	36%	39%	52%
Coastal Lighthouses	39%	42%	46%	30%	36%	50%
Portland Rose Festival	37%	39%	38%	34%	36%	43%
Oregon Caves	37%	41%	38%	31%	38%	42%
Oregon Wineries	36%	42%	34%	28%	41%	45%
Multnomah Falls	35%	37%	40%	30%	33%	40%
Oregon Shakespeare Festival Ashland	30%	30%	31%	26%	29%	36%
Oregon Microbreweries	27%	33%	25%	20%	29%	35%
Portland Art Museum	27%	26%	28%	19%	34%	34%
Pendleton Roundup	25%	21%	33%	22%	21%	29%
Hay Stack Rock at Cannon Beach	24%	27%	28%	19%	22%	27%
Covered Bridges	24%	24%	26%	19%	26%	31%
Timberline Lodge	23%	23%	26%	18%	28%	24%
Fort Clatsop Lewis and Clark expedition	22%	20%	29%	18%	23%	27%
Windsurfing in Hood River	21%	22%	24%	18%	22%	24%
John Day Fossil Beds	19%	20%	23%	13%	20%	26%
Bandon Dunes Golf Courses	16%	15%	18%	13%	19%	22%
Painted Hills	15%	11%	16%	8%	22%	20%
Smith Rock Bend	15%	17%	17%	8%	20%	18%
Cycle Oregon	15%	16%	15%	9%	22%	17%

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

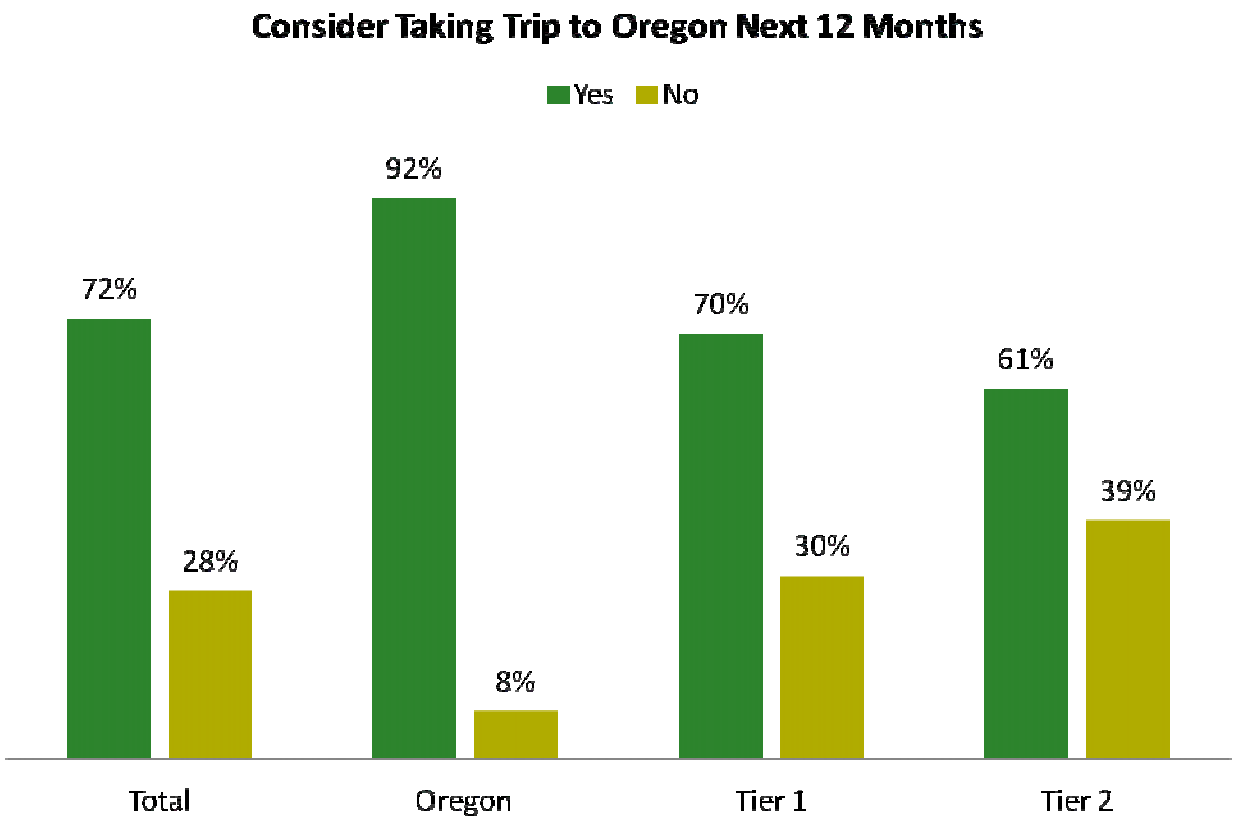
Nearly 7 out of 10 Respondents Would Consider Taking A Trip to Oregon Within the Next Year

Well-Rounded/Actives and Passionates Are Most Likely to Consider Trip



Q42. Would you consider taking a trip to Oregon in the next 12 months?

Almost Three Quarters of Travelers Surveyed Are Considering Taking a Trip to Oregon



Q42. Would you consider taking a trip to Oregon in the next 12 months?

Cultural/Heritage Behaviors - All Leisure Travelers

54% of all leisure travelers say they want their trip be **educational**

45% agree that they **spend more money** on **cultural and/or heritage activities** while on a trip

41% will **pay more for lodging** that **reflects the cultural** and/or **heritage** of the **destination they are visiting**

Important Factors in Choosing Leisure Travel Activities – All Leisure Travelers

81% of all leisure travelers want to try a different experience while traveling (Change/No Change)

65% think it's important to explore a different culture.

Base: Leisure Travelers n=1048
Q34. How important are each of the following factors when choosing the types of activities you do on a leisure trip?

76% of Passionate Seekers of cultural/heritage leisure travel seek travel experiences where buildings have retained their historic integrity

Base: Cultural/Heritage leisure travelers n=815
Q34. Please indicate how strongly you agree with each of the following as they apply to your leisure travel.

Psychographics of Cultural/Heritage Travelers

For 95% of Passionate/Seekers, creating lasting memories is the number one motivator for taking a trip.

83% for this leisure travel segment include learning more about local history and local cultures as being a key motivator.

Base: Cultural/Heritage leisure travelers n=815
Q34. How important are each of the following factors when choosing the types of activities you do on a leisure trip?

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END OF DRAFT
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