

# Oregon Cultural and Heritage Travelers Study

November, 2012



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## 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.

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



- 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.

- 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.

- 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

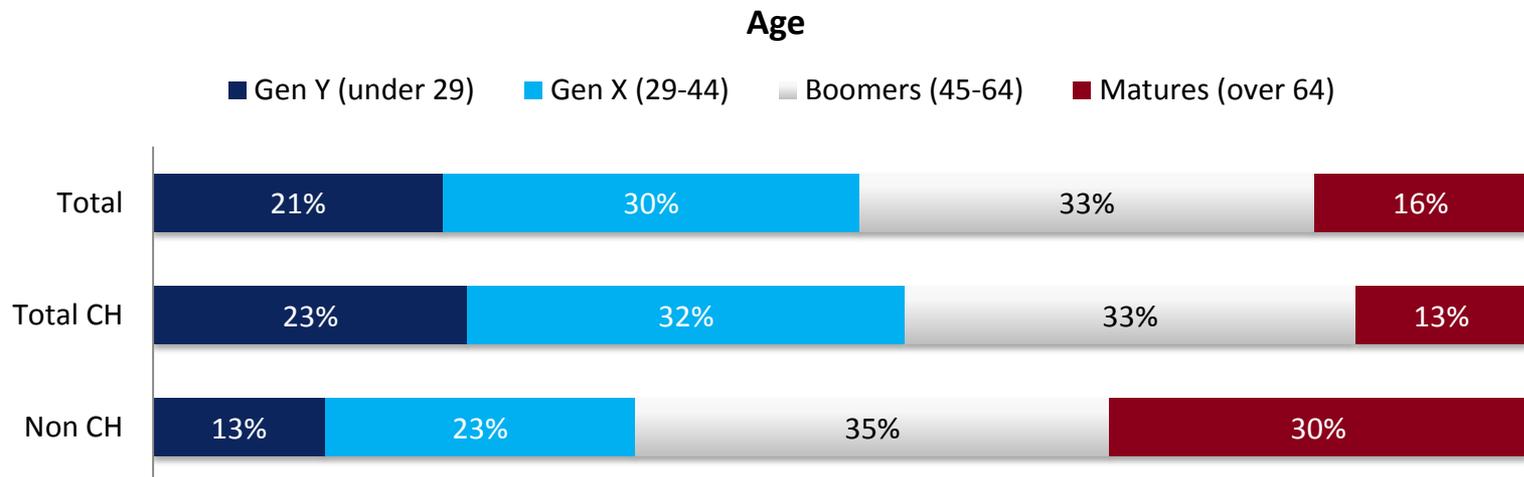
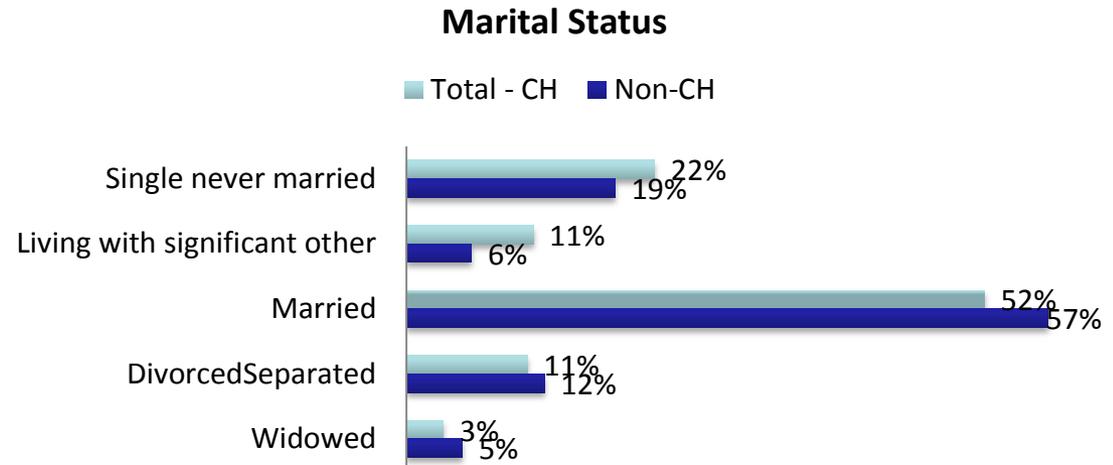
- For purposes of this study Tier 1 (or Primary Markets) were identified as: Oregon, Idaho, Alberta, Utah, Northern California, Vancouver, BC, Washington; Tier 2 (or Secondary Markets) were identified as Southern California and New York.
- Among all tiers, Tier 2 travelers are most likely to take a Culture 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.

Cultural Heritage Travelers  
Versus  
Non-Cultural Heritage Travelers

# Demographics

# Cultural and Heritage Traveler Demographics

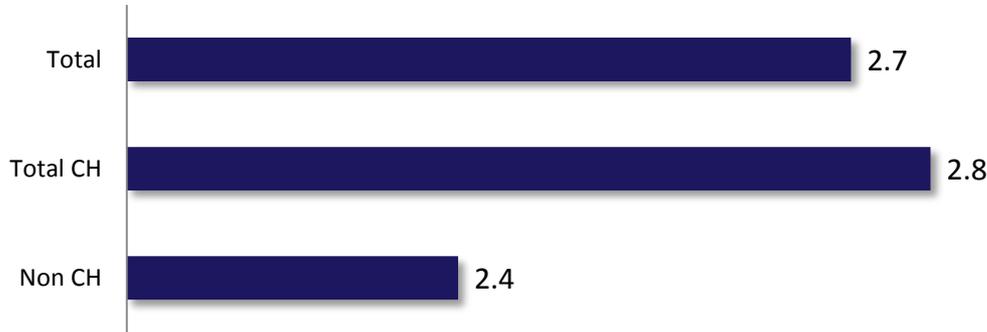
	Total	Total CH	Non CH
Sample Size	2000	1662	338
Gender			
Male	49%	49%	52%
Female	51%	51%	48%
Race			
White/Caucasian	83%	82%	90%
Black/African-American	3%	3%	3%
Asian/Pacific islander	10%	11%	5%
Native American	3%	3%	3%
Something else	3%	4%	2%



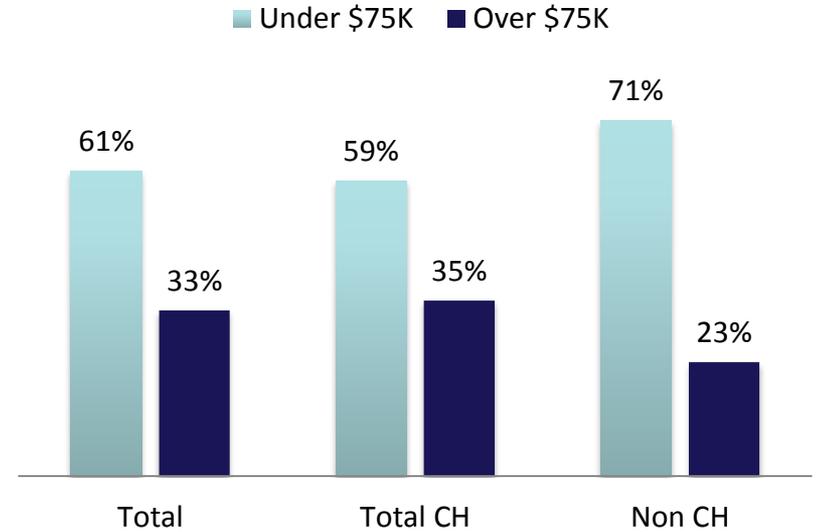
D57B. What is your gender?  
D58. What is your age?

# Cultural and Heritage Traveler Demographics

### Household Size Mean



### Household Income



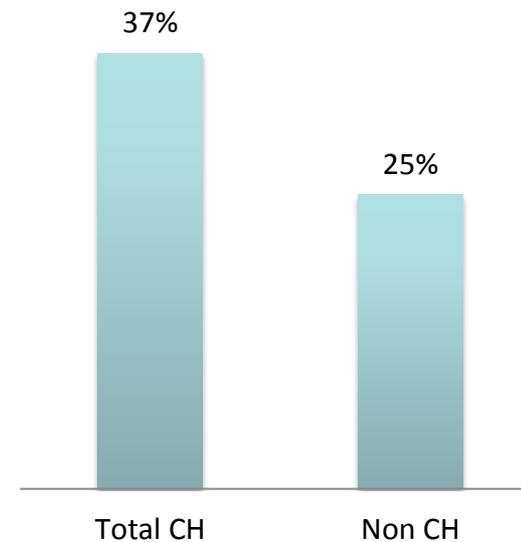
Q62. Please indicate your household size, or the number of people there are in your household?  
D65. What was your TOTAL household income in 2011 before taxes?

# Cultural and Heritage Traveler Demographics

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

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

## Have Children under 18 in Household



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

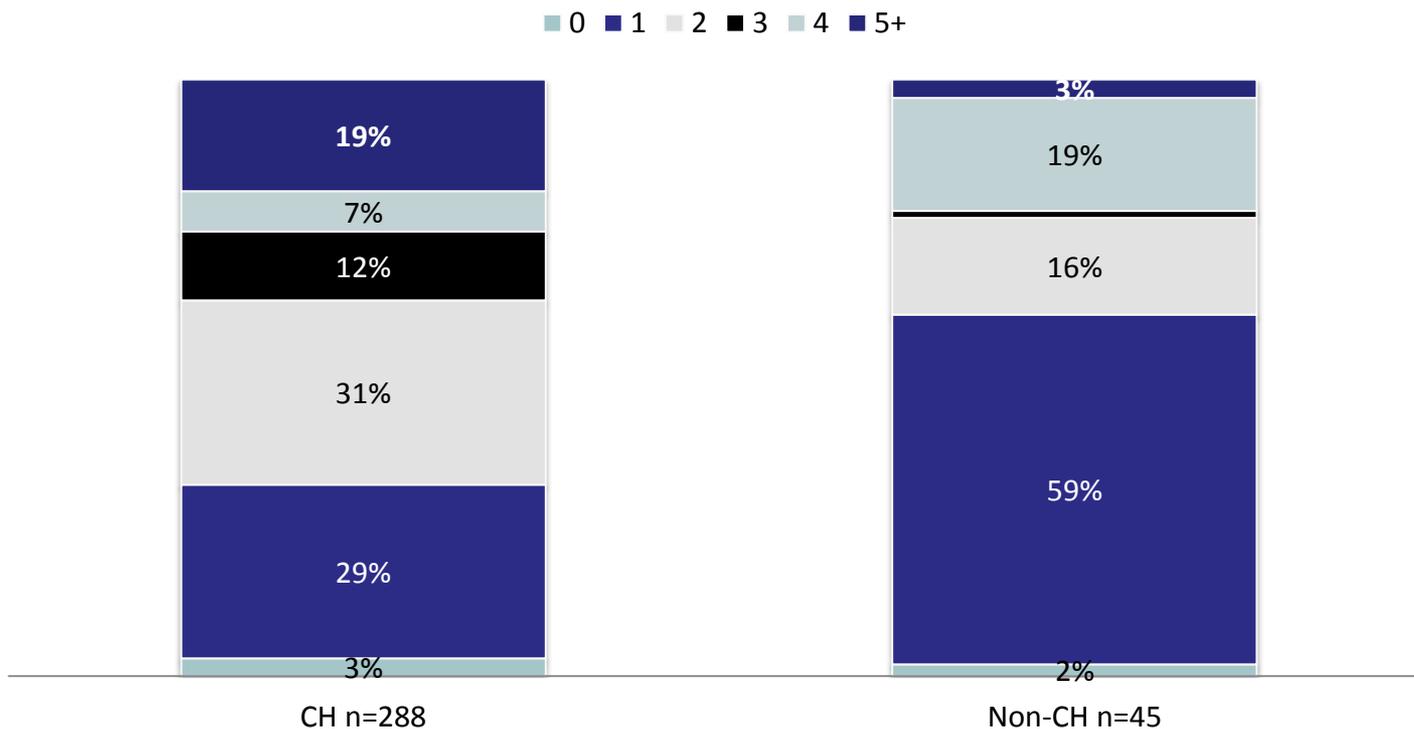
D67. What is your current employment status?

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

# Travel To and Within Oregon

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

## Leisure Trips Taken Annually to State of Oregon



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

Awareness of Oregon CH Assets	CH	Non CH
Sample Size	1662	338
The Oregon Trail	62%	56%
Mt Hood	58%	59%
Crater Lake	54%	53%
Columbia River Gorge	46%	49%
Oregon Public Beaches	44%	40%
Coastal Lighthouses	40%	31%
Oregon Wineries	38%	22%
Oregon Caves	38%	30%
Portland Rose Festival	38%	34%
Multnomah Falls	35%	30%
Oregon Shakespeare Festival Ashland	31%	24%
Portland Art Museum	29%	15%
Oregon Microbreweries	29%	18%
Covered Bridges	25%	15%
Pendleton Roundup	25%	28%
Hay Stack Rock at Cannon Beach	24%	21%
Timberline Lodge	24%	20%
Fort Clatsop Lewis and Clark expedition	23%	15%
Windsurfing in Hood River	22%	18%
John Day Fossil Beds	20%	14%
Bandon Dunes Golf Courses	17%	12%
Cycle Oregon	16%	8%
Smith Rock Bend	16%	9%
Painted Hills	16%	13%
None of the above	11%	17%

This is true whether the traveler has visited Oregon or not.

These varied assets can be used to Oregon's advantage, especially as they relate to the well-rounded and passionate segments.

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

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

Most Closely Represent Oregon	CH	Non CH
Sample Size	1662	338
The Oregon Trail	26%	23%
Mt. Hood	22%	24%
Crater Lake	21%	19%
Oregon's public beaches	19%	19%
Columbia River/Gorge	15%	17%
Coastal Lighthouses	12%	8%
Oregon Caves	10%	12%
Multnomah Falls	9%	8%
Portland Rose Festival	7%	9%
Oregon Wineries	8%	4%
Oregon Shakespeare Festival (Ashland)	7%	6%
Hay Stack Rock at Cannon Beach	6%	5%
Fort Clatsop (Lewis and Clark expedition)	5%	3%
Oregon Microbreweries	4%	5%
Portland Art Museum	4%	3%
Painted Hills	3%	5%
Timberline Lodge	3%	6%
Covered Bridges	3%	3%
Pendleton Roundup	2%	8%
Cycle Oregon	3%	3%
Smith Rock (Bend)	2%	3%
Bandon Dunes Golf Courses	2%	3%
John Day Fossil Beds	2%	1%
Windsurfing in Hood River	2%	1%

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

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

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

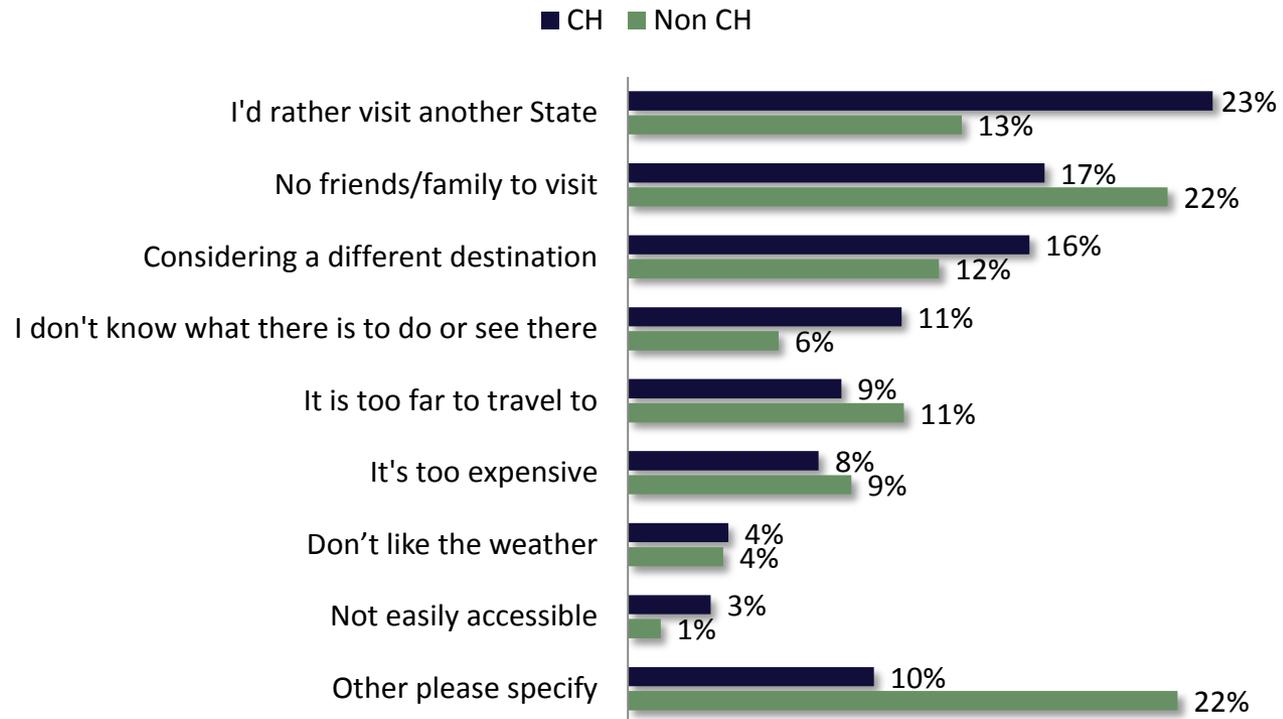
Greatest Impact When Planning OR Trip	CH	Non CH
Sample Size	1662	338
Oregon's public beaches	25%	22%
Crater Lake	20%	24%
The Oregon Trail	17%	16%
Mt. Hood	15%	17%
Coastal Lighthouses	13%	11%
Columbia River/Gorge	12%	17%
Multnomah Falls	11%	11%
Oregon Caves	10%	12%
Oregon Wineries	10%	9%
Portland Rose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

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

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

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

## Why Traveler May Not Consider a Trip to Oregon



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

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

# Cultural and Heritage Awareness

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

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

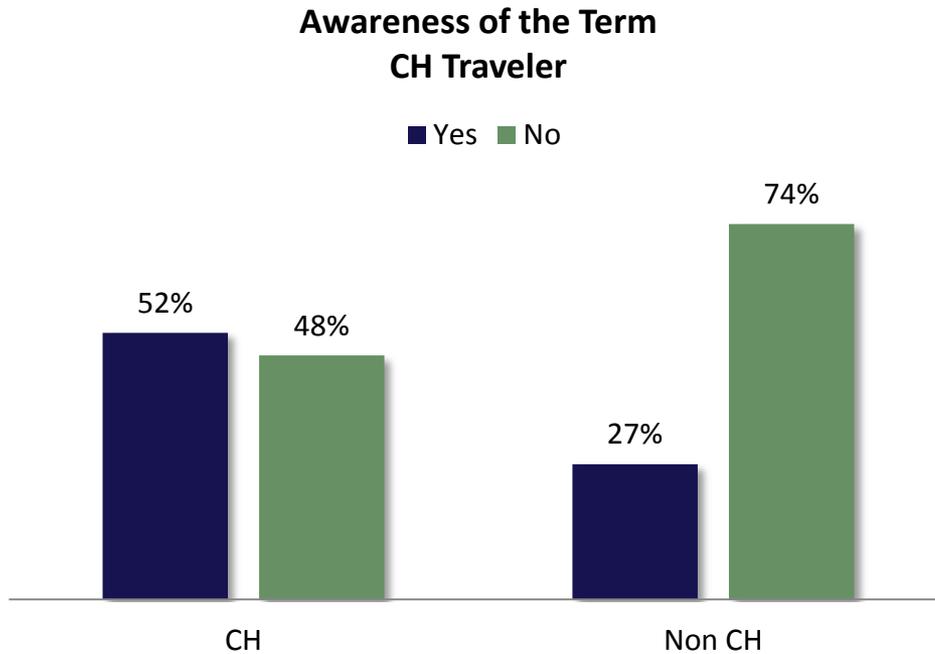
Seattle and LA destinations attracted a greater number of CH travelers than Non-CH travelers.

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

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

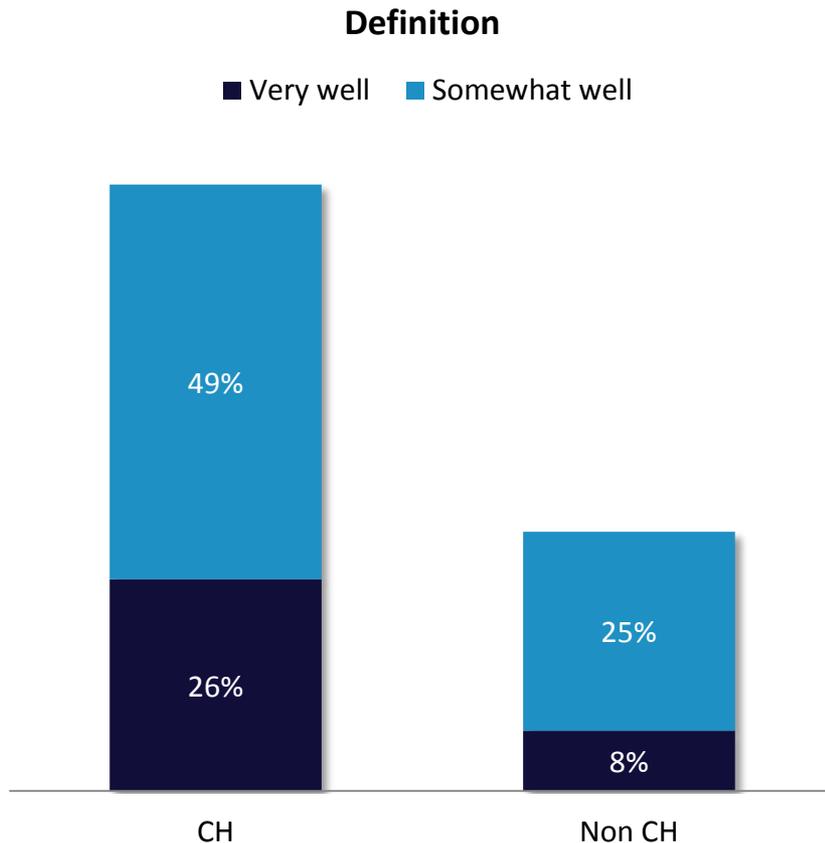
Q6: The term cultural and/or heritage traveler is sometimes used to describe certain types of leisure travelers. Have you ever heard this term?  
 Q9. Thinking about your most recent trip, what state(s) did you visit?  
 Q10. And thinking about your most recent trip, what city or cities did you visit?

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



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

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

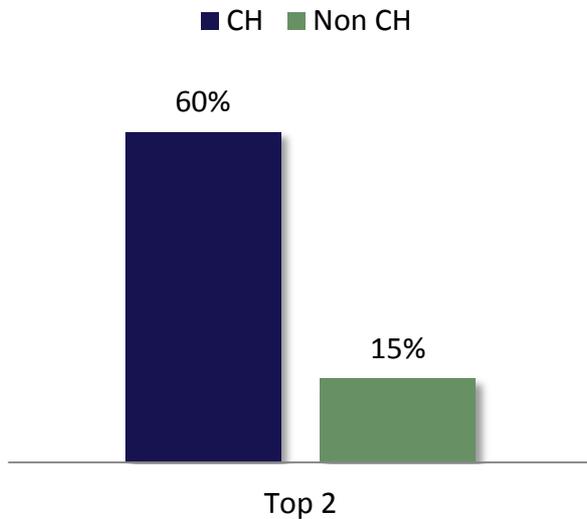


Oregon travelers identify themselves with the definition of CH traveler at rates comparable to the 2009 National findings.

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

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

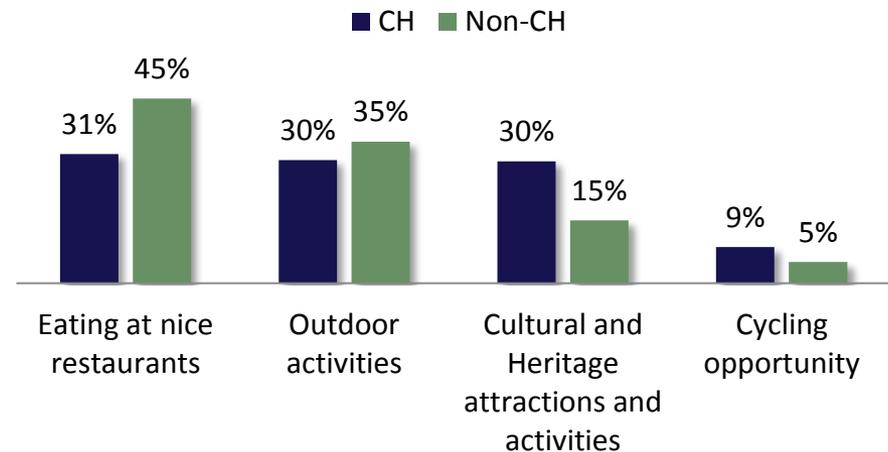
## Likelihood of Taking CH Trip



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

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

## Ranking Importance When Planning Vacation



Q39: How likely are you to take a cultural and/or heritage trip in the next 12 months N=2000

Q40: When planning your vacation which of the following is most important to you and which is least important Please rank the following N=2000

# Activities

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

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

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

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

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

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

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

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

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

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

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

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

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

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

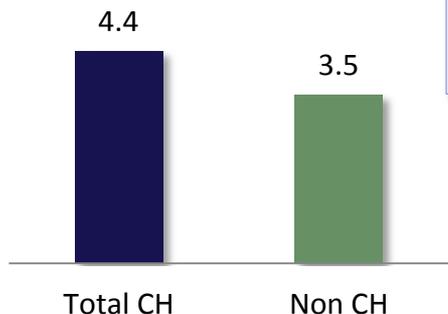
Motivators	CH	Non CH
Relaxing and relieving stress	91%	80%
Creating lasting memories	90%	73%
Trying a new experience	87%	54%
Enriching my relationship with my spouse/partner/children	82%	63%
Having stories to share back home	75%	48%
Explore a different culture	75%	13%
Learning more about history and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

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

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

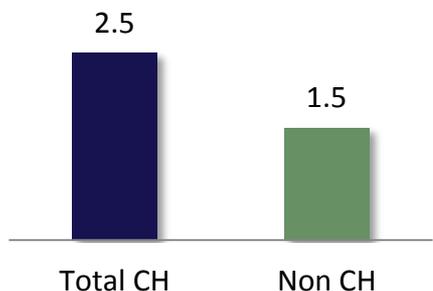
# CH Travelers Take Significantly More of Every Type of Trip and Their Dwell Time is Longer

## Average Number Leisure Trips



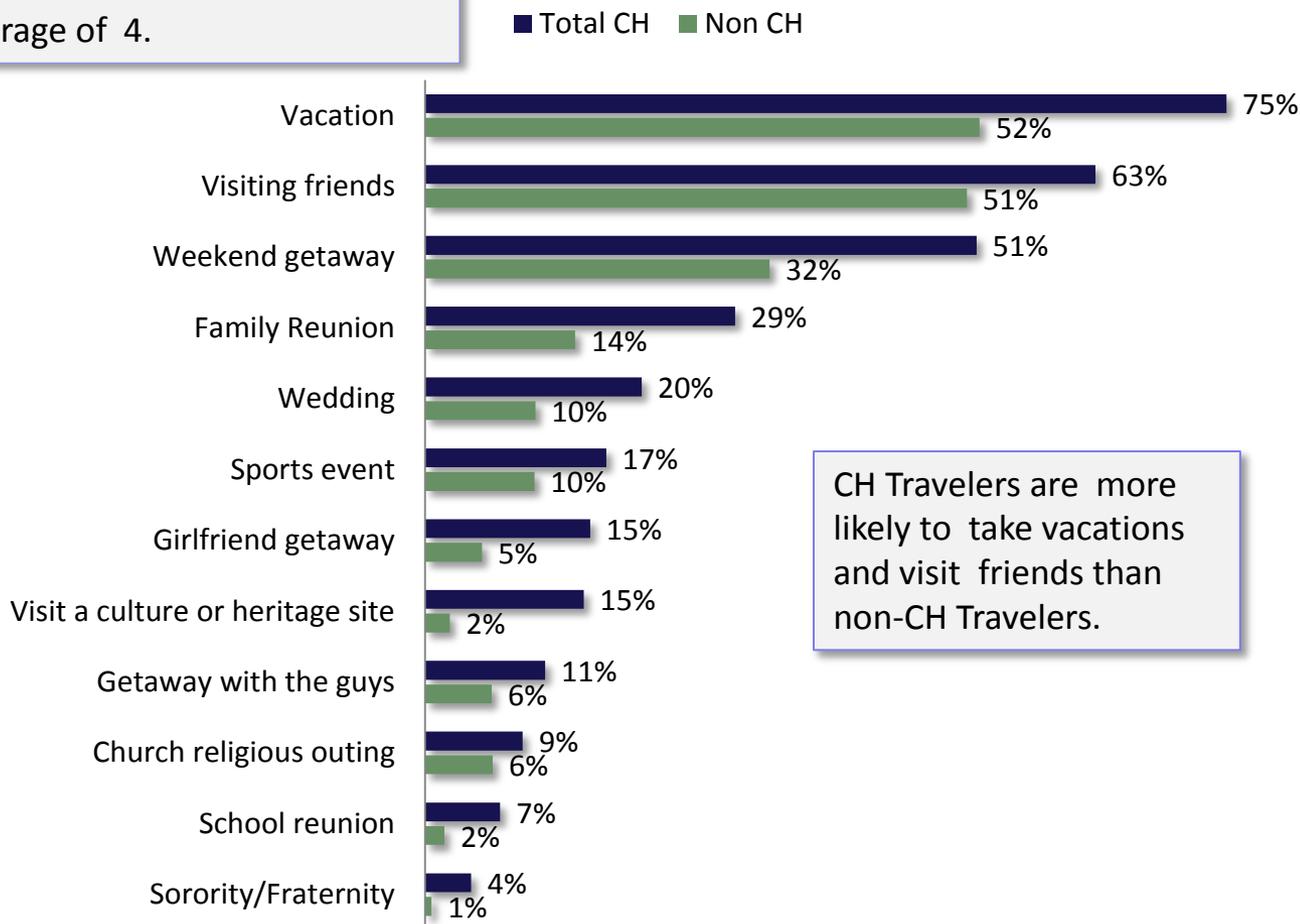
2009 National CH travelers took an average of 5 leisure trips and non-CH Travelers took an average of 4.

## Average Number Combined Trips



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

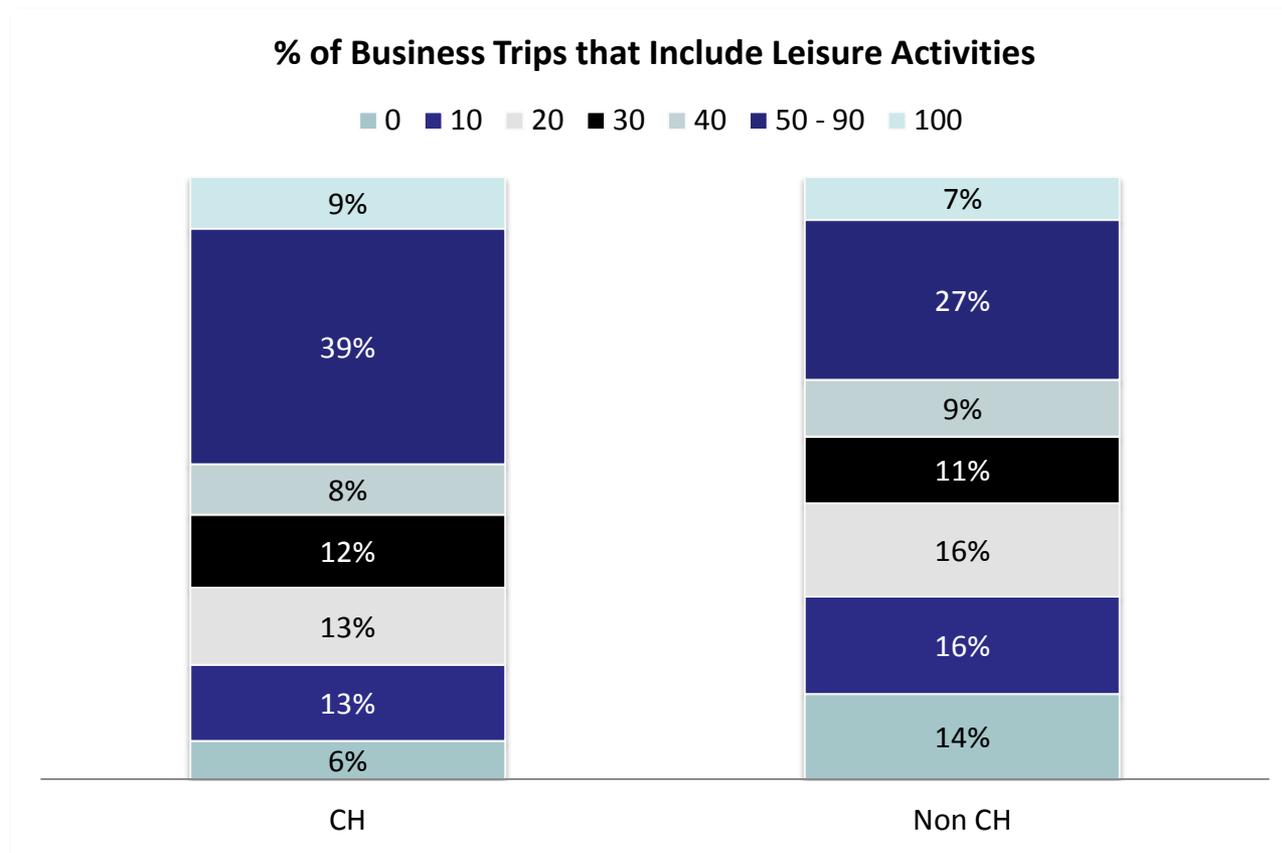
## Types of Trip



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

S1 1: Leisure pleasure vacation or personal purposes within the US  
 S1\_3: Combined business and leisure within the US  
 S1b: And which of the following types of trips have you taken in the past 12 months Choose as many as apply

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



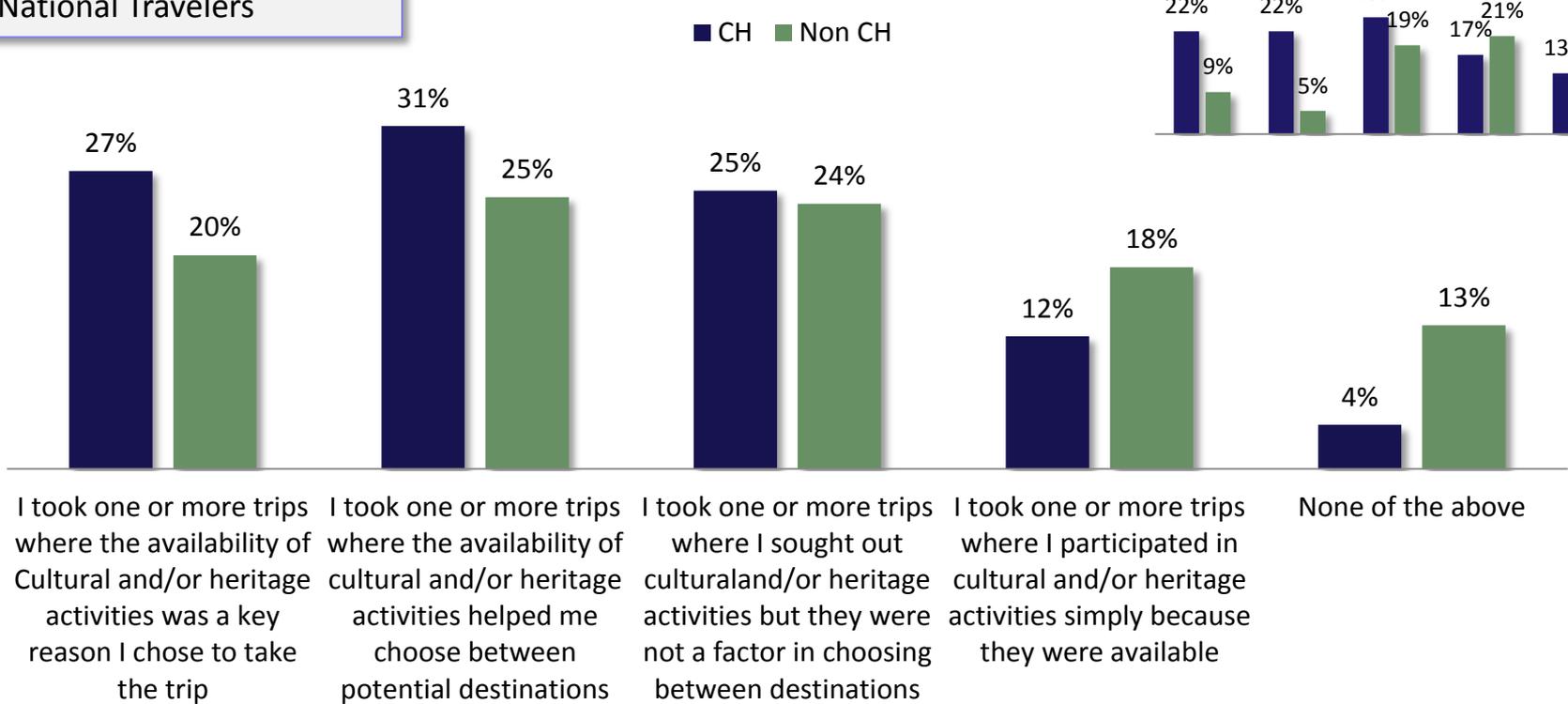
S3: What percentage of your domestic business travel includes personal leisure activities?

# Drivers of Destination Choice

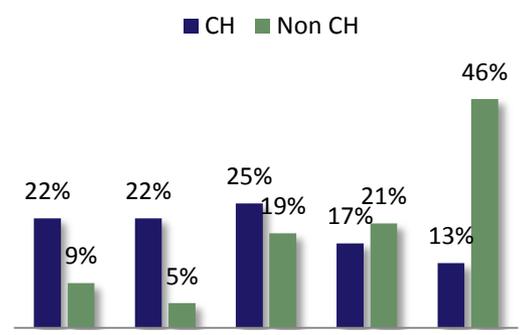
# For CH Travelers, Cultural and Heritage Activities Are Greater Drivers of Destination Choice Although the Gap Is Narrower Than the National Sample, It Is Still Statistically Significant

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

## Driver of Destination Choice



## 2009 National



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

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

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

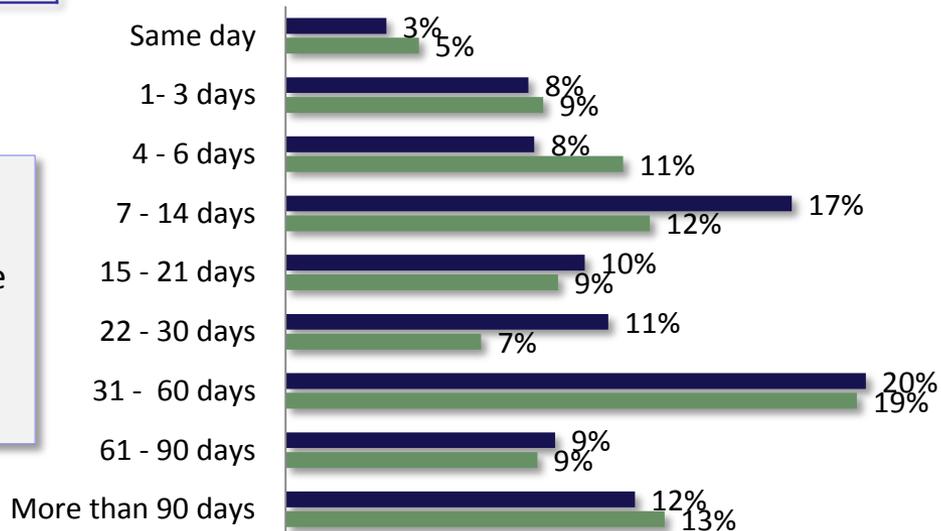
Those CH travelers who considered specific events they were interested in as a first step when selecting the destination for their most recent trip is 5% lower than the 2009 National Study. This seems realistic given the percent of CH travelers who are planning activities and attractions once they get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

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

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

## Booking Their Trip

■ CH ■ Non CH



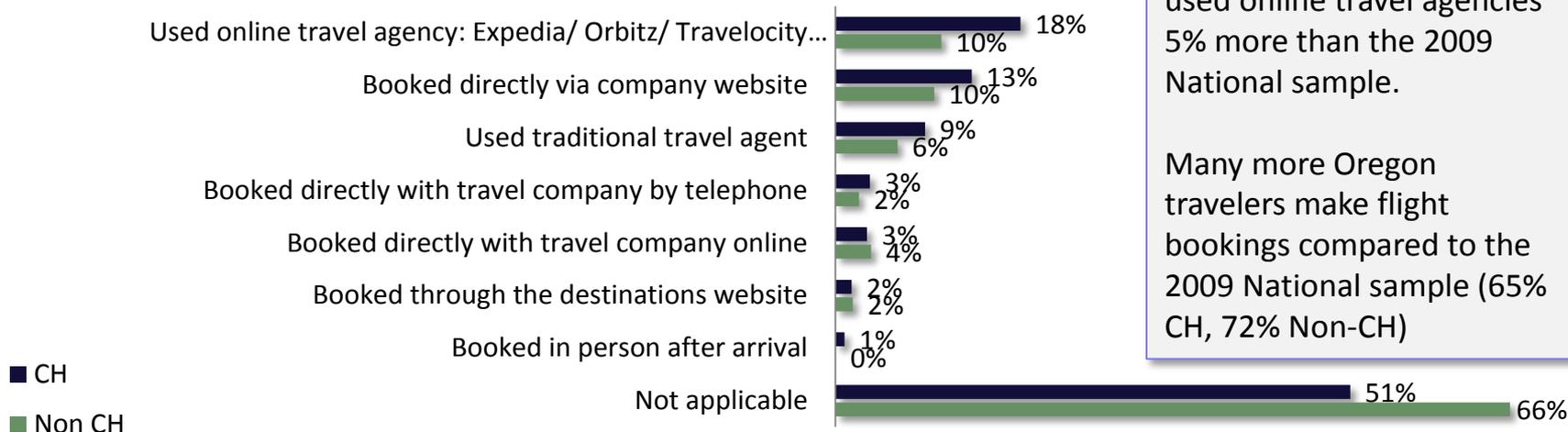
Q11: What was your first step when selecting the destination of this most recent trip? Please select all that apply

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

# Booking Behavior

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

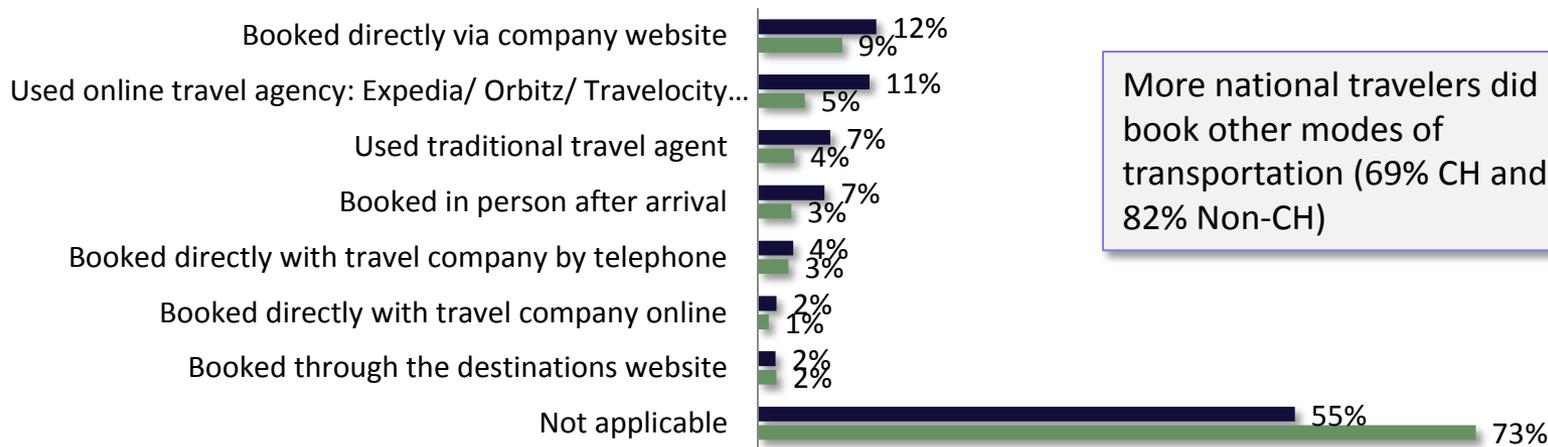
## Flight Booking



Oregon travelers in 2012 used online travel agencies 5% more than the 2009 National sample.

Many more Oregon travelers make flight bookings compared to the 2009 National sample (65% CH, 72% Non-CH)

## Transportation Booking

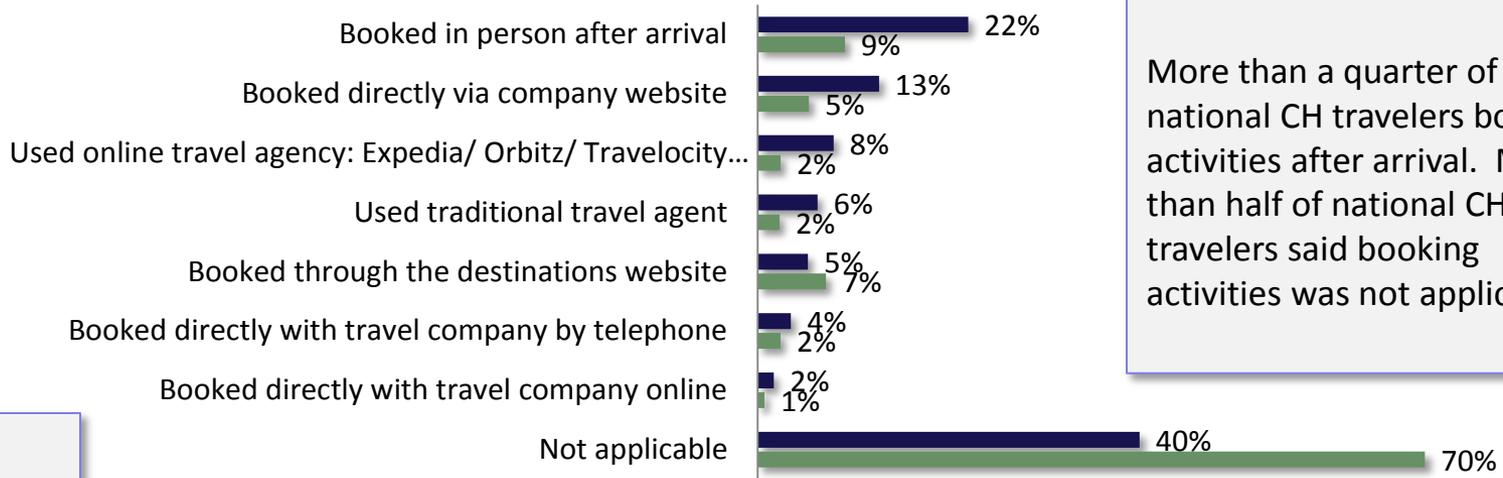


More national travelers did book other modes of transportation (69% CH and 82% Non-CH)

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

■ CH  
■ Non-CH

## Activities Booking

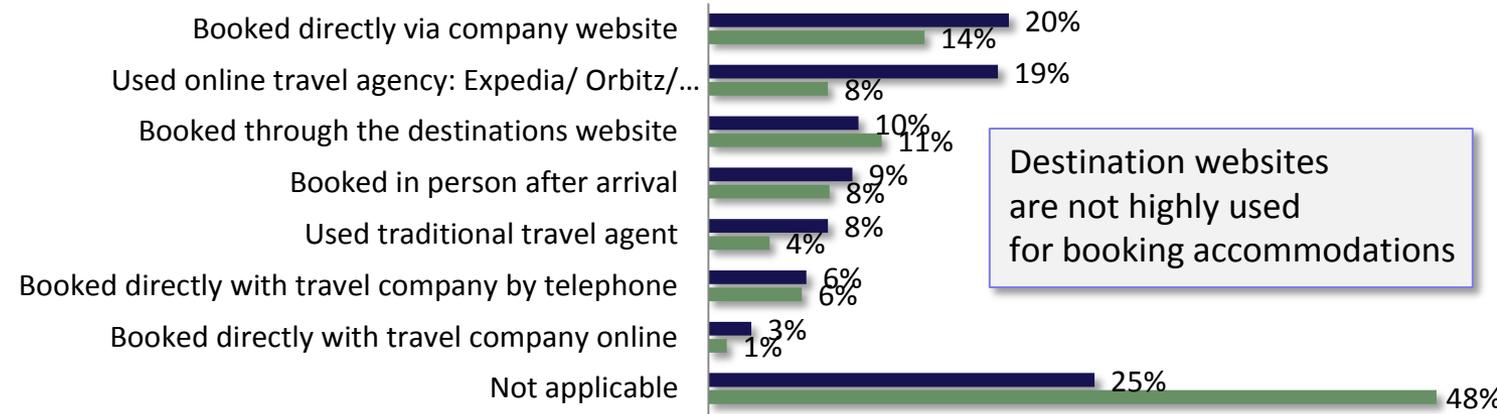


Three-fifths of Oregon CH travelers book activities.

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

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

## Accommodations Booking



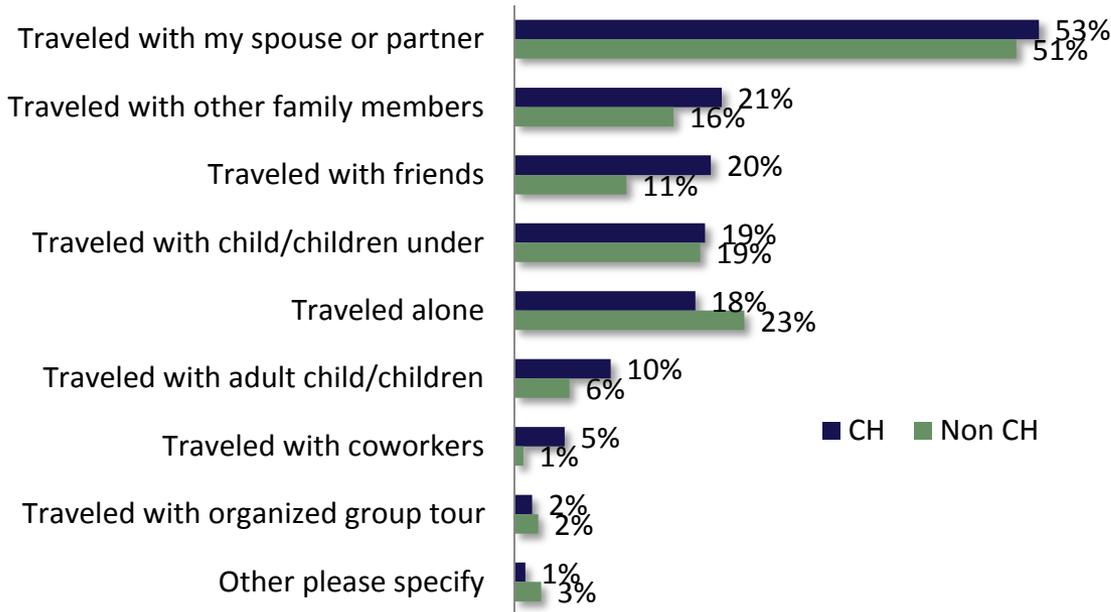
Destination websites are not highly used for booking accommodations

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

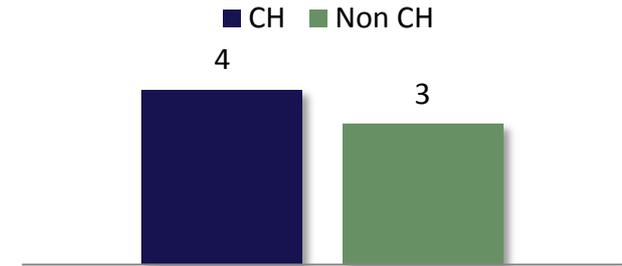
# Travel Party Composition

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

## With Whom They Traveled

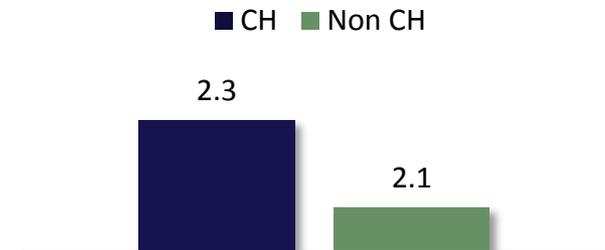


## Average Travel Party



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

## Average HH Members in Travel Party



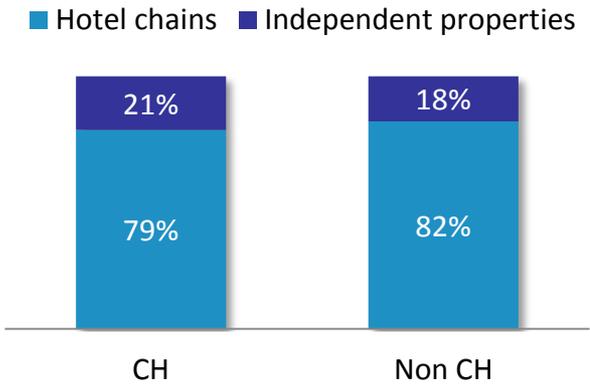
There are marginal differences between travel companions in the National Study versus the 2012 Oregon study except a somewhat smaller percentage in 2012 are traveling with other family members; economics may play a key factor here.

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

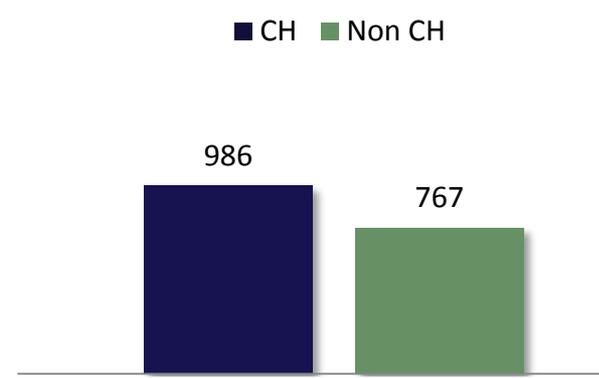
# Trip Characteristics

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

### Type of Hotel

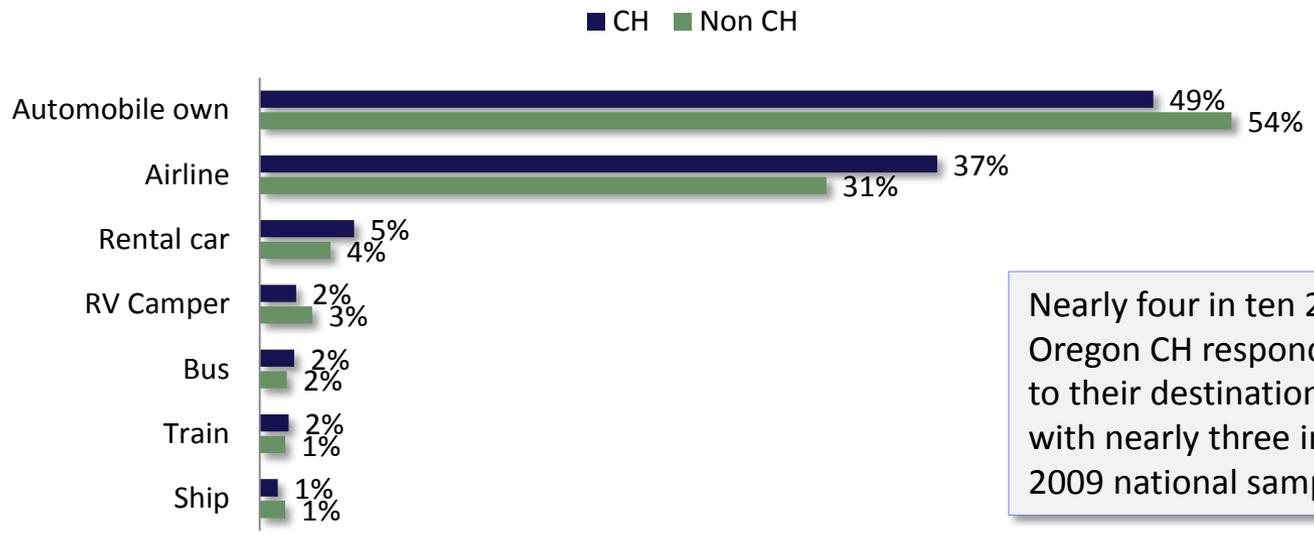


### Average Distance Traveled



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

### Mode of Transport



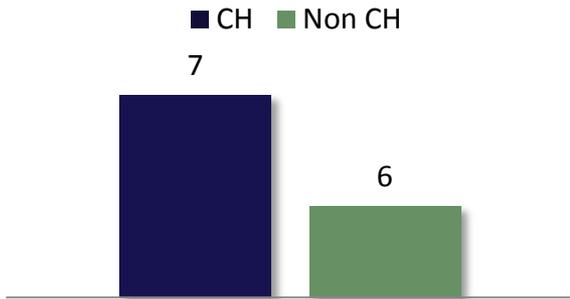
Nearly four in ten 2012 Oregon CH respondents flew to their destination compared with nearly three in ten in the 2009 national sample.

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

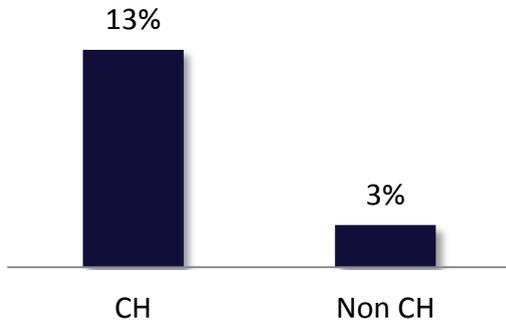
# Nearly Half of CH Travelers Stayed Five or More Nights on Their Most Recent Trip

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

## Average Number of Nights

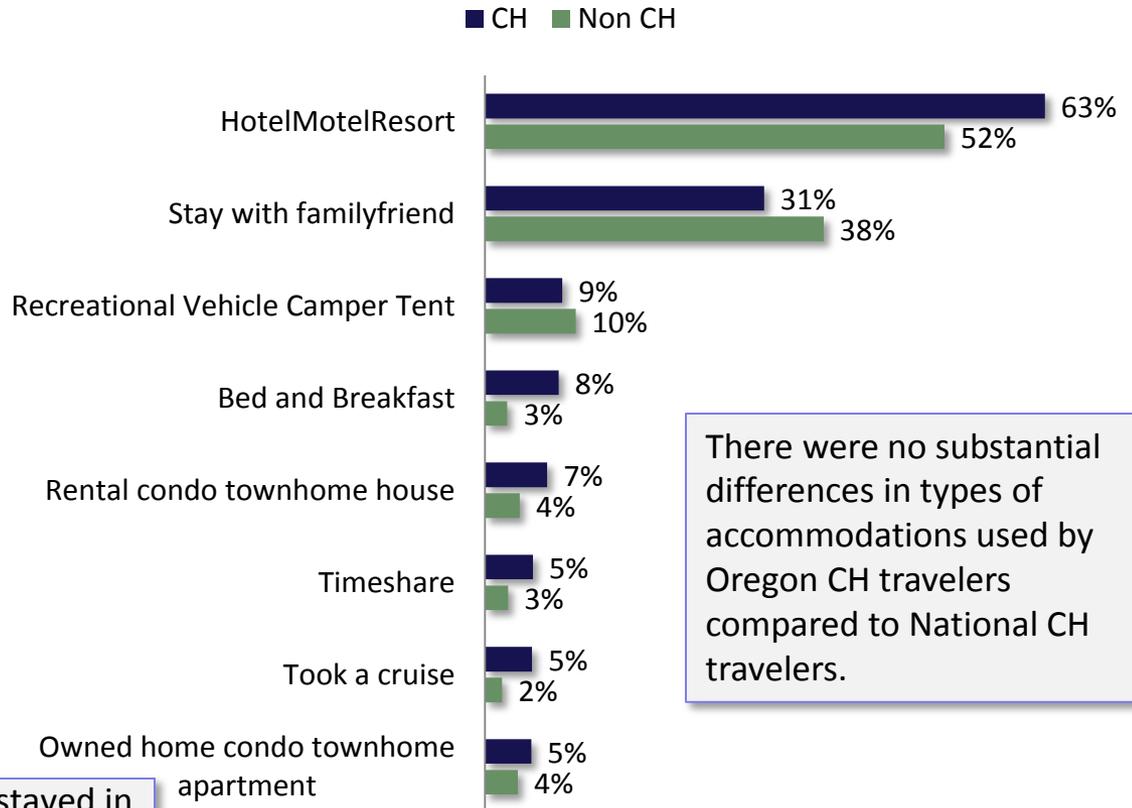


## Historic Property: Yes



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

## Type of Accommodation



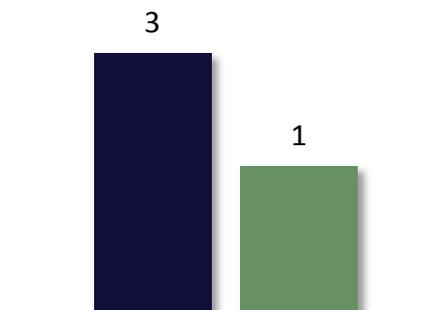
There were no substantial differences in types of accommodations used by Oregon CH travelers compared to National CH travelers.

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

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

## # of Trips Considered to be a CH trip

■ CH ■ Non CH

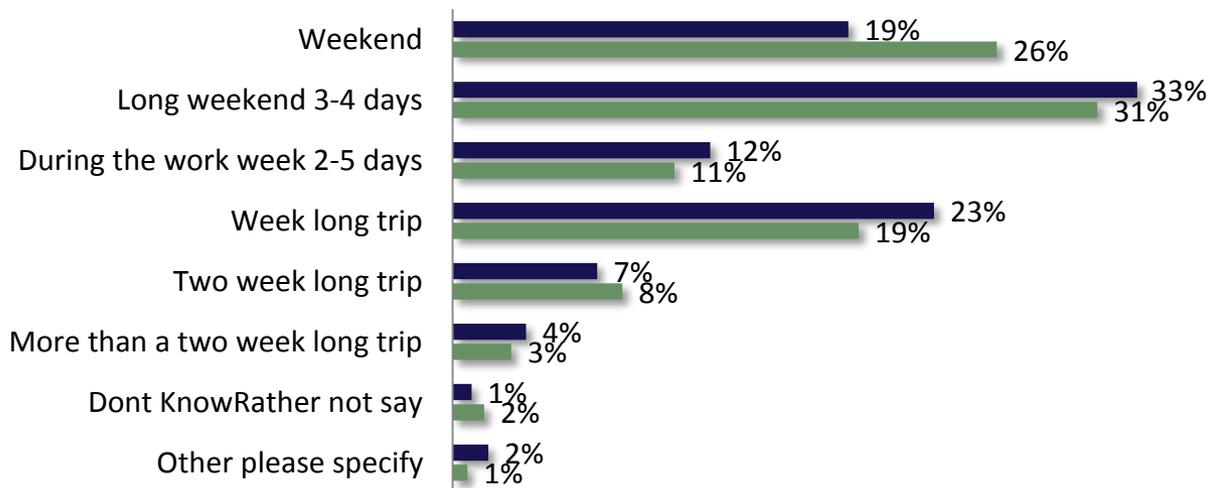


National Travelers consider slightly fewer of their trips to be CH trips.

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

## Length of CH Trip

■ CH ■ Non CH



Q36: Thinking about the [insert QS1, Response 1 & 3 answer] leisure trips you took in the US in the past 12 months, how many of those would you describe as cultural and/or heritage trips?

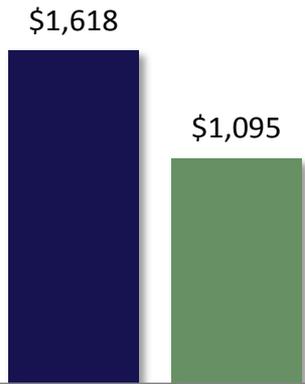
Q37: Typically how long are your cultural and/or heritage trips?

# Spending

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

## Average Spend Per Trip

■ CH ■ Non CH



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

CH Travelers outspent their counterparts on transportation, meals and shopping

## Spending Breakdown

■ Transportation ■ Lodging ■ Meals ■ Entertainment & Cultural Events ■ Shopping



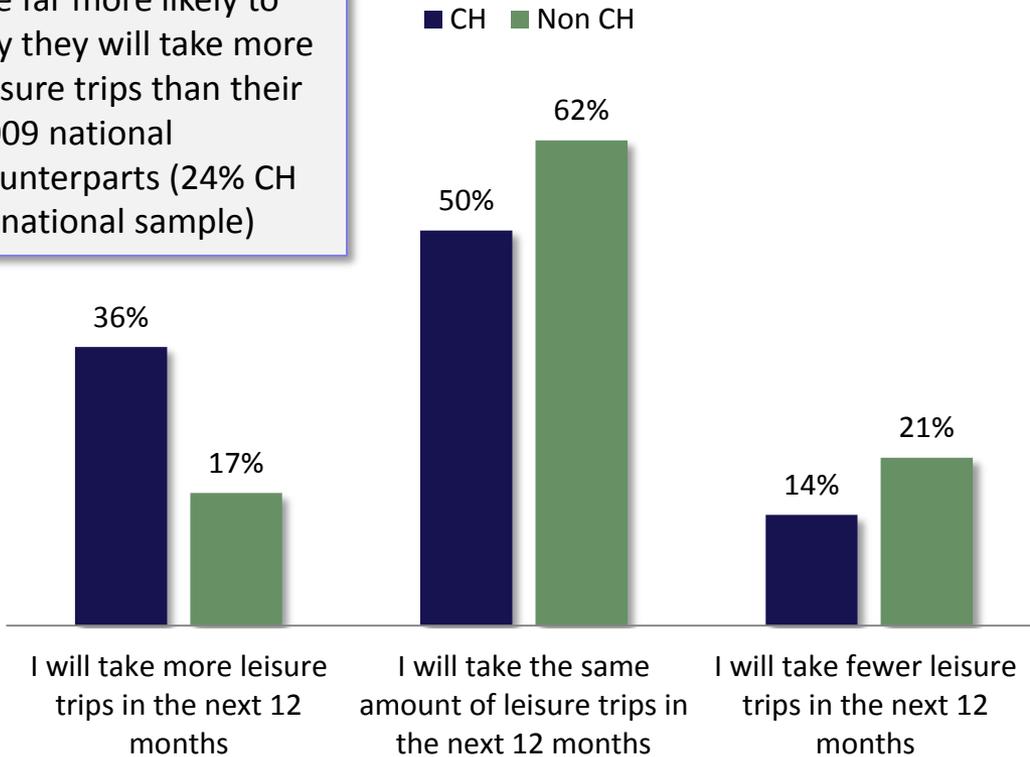
Q21: About how much would you say you personally spent on this most recent trip including transportation lodging entertainment, shopping?  
 Q22\_1: How much did you spend on each of the following Please include spending on activities that you paid for even if they were for other people?

# Future Travel

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

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

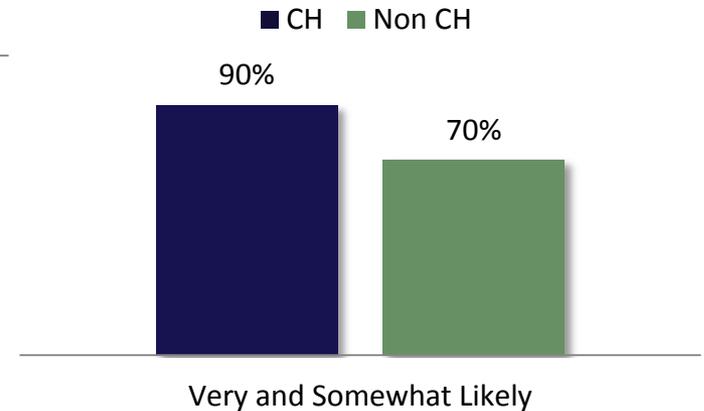
## Travel Frequency



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

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

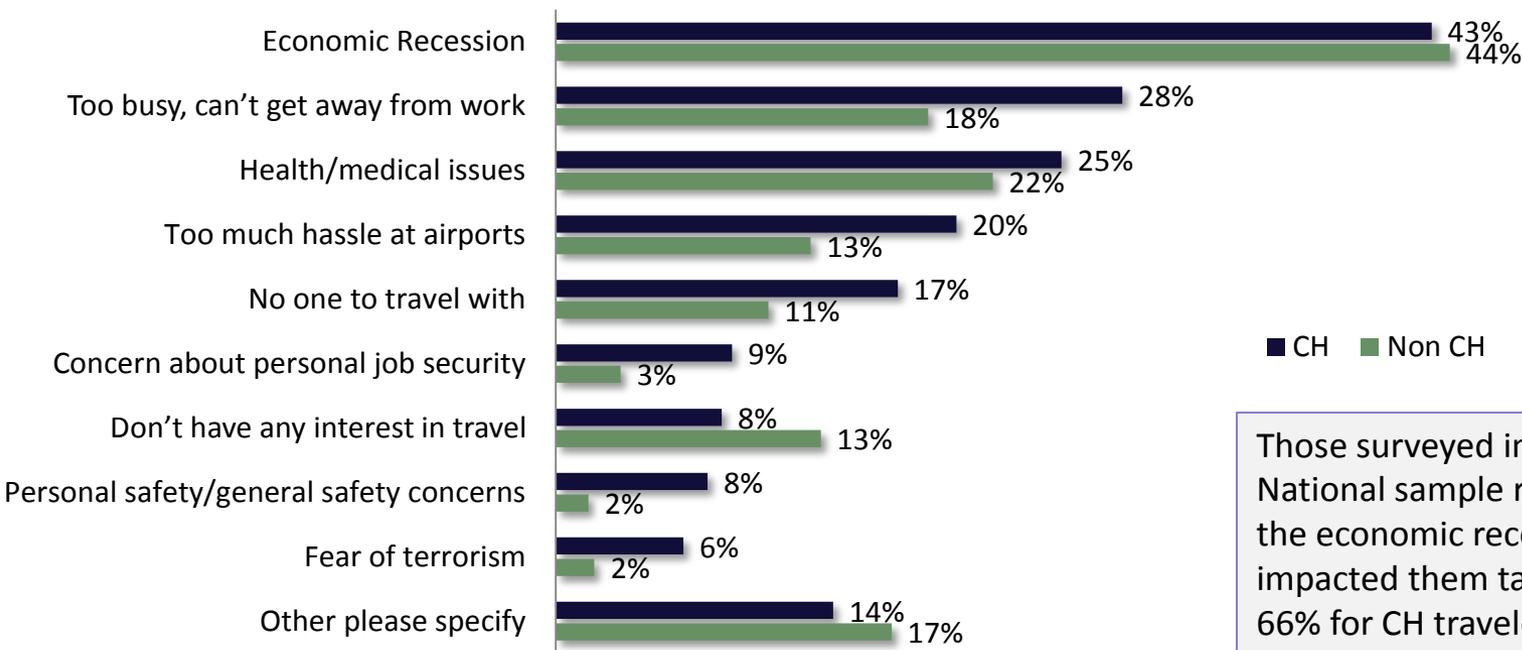
## Likely to Take Leisure Trip in Next 12 Months



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

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

## Impact on Taking a Leisure Trip



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

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

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

# Information Sources

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

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

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

60% National CH travelers go directly to the website of destination for planning information.

57% of 2009 of National CH travelers took recommendations from friends and family.

# Publications Read

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Q32C: Which of the following types of history publications do you typically read either in print or online

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



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

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

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

# Online Sources and Social Media

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

Websites	CH	Non CH
Sample Size	1661	337
Facebook.com	68%	56%
Google.com	67%	50%
Amazon.com	54%	41%
Youtube.com	54%	33%
Yahoo.com	47%	38%
Ebay.com	36%	29%
Mapquest.com	31%	27%
MSN.com	28%	16%
Expedia.com	26%	10%
Google+	26%	6%
Travelocity.com	24%	9%
Twitter.com	19%	8%
ESPN.com	19%	9%
TripAdvisor.com	19%	7%
CNN.com	19%	7%
Bing.com	18%	14%
Orbitz.com	17%	5%
Pinterest.com	17%	7%
Priceline.com	15%	8%
HOregonwire.com	14%	6%
Huffingtonpost.com	13%	5%
Linkedin.com	13%	6%
Kayak.com	12%	6%
National Geographic.com	11%	1%
Yelp.com	10%	4%

Social Networking Sites	CH	Non CH
Sample Size	1661	337
Facebook.com	79%	70%
Youtube.com	47%	23%
Twitter.com	21%	10%
Google.com	20%	7%
Pinterest.com	15%	6%
LinkedIn.com	13%	6%
Yelp.com	7%	3%
Instagram.com	7%	2%
Flickr	5%	2%
FourSquare	4%	3%
Vimeo	3%	2%
Other	7%	19%

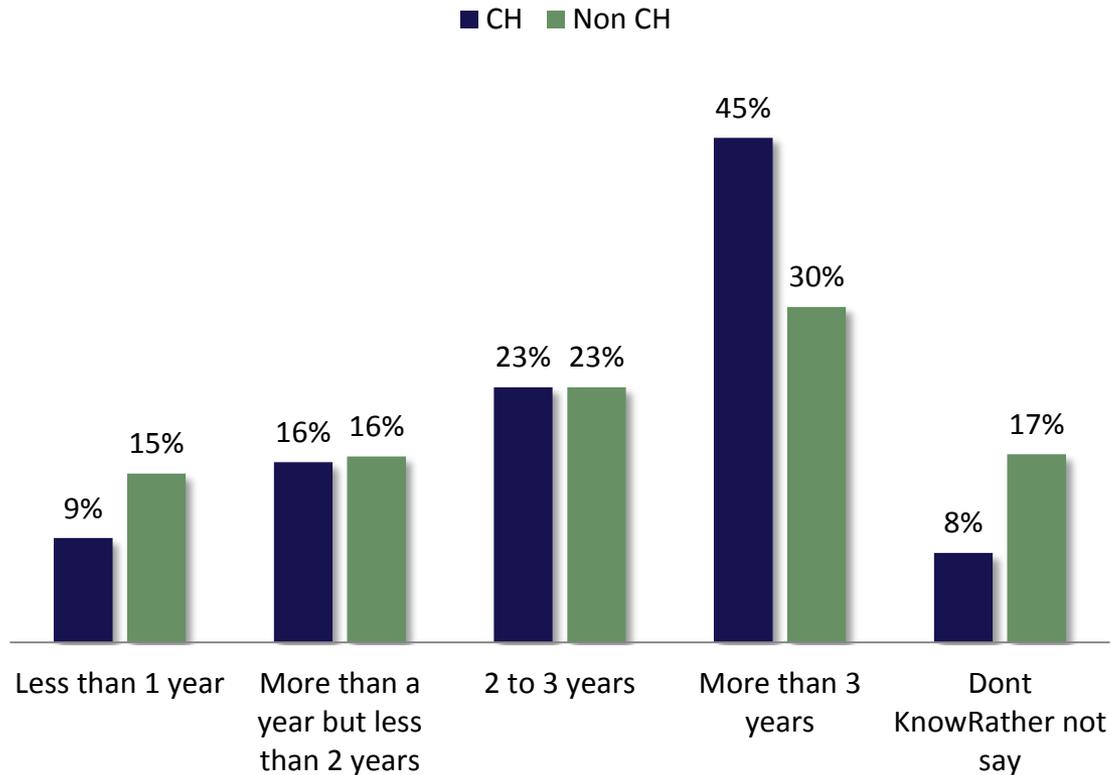
CH Travelers take advantage of social networking sites such as Facebook and Youtube—the largest video sharing site in the world and a cheaper and faster vehicle for marketers and advertisers

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

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

# CH Travelers are Experienced Users of Social Media

## Length of Time Using Social Media



# Cultural Heritage Travelers: Segmentation

# Demographics

# Segment Demographics

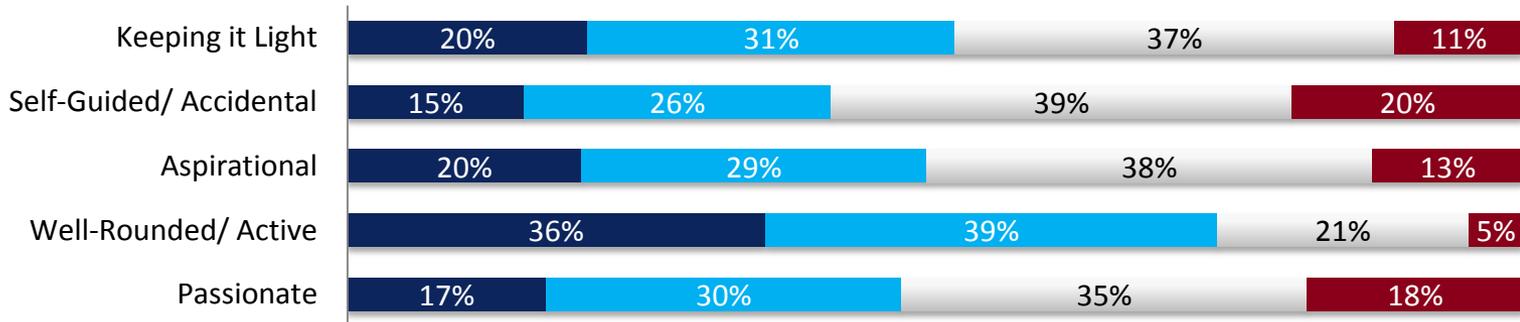
	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded/ Active	Passionate
Sample Size	299	245	327	446	345
Gender					
Male	46%	51%	47%	56%	42%
Female	54%	49%	53%	44%	58%
Race					
White/Caucasian	84%	87%	80%	73%	88%
Black/African-American	2%	3%	3%	3%	2%
Asian/Pacific islander	10%	8%	11%	16%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

## Age

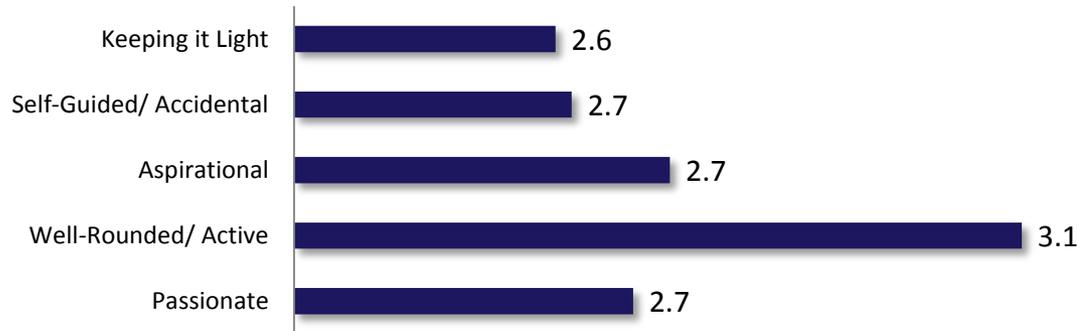
■ Gen Y (under 29) ■ Gen X (29-44) ■ Boomers (45-64) ■ Matures (over 64)



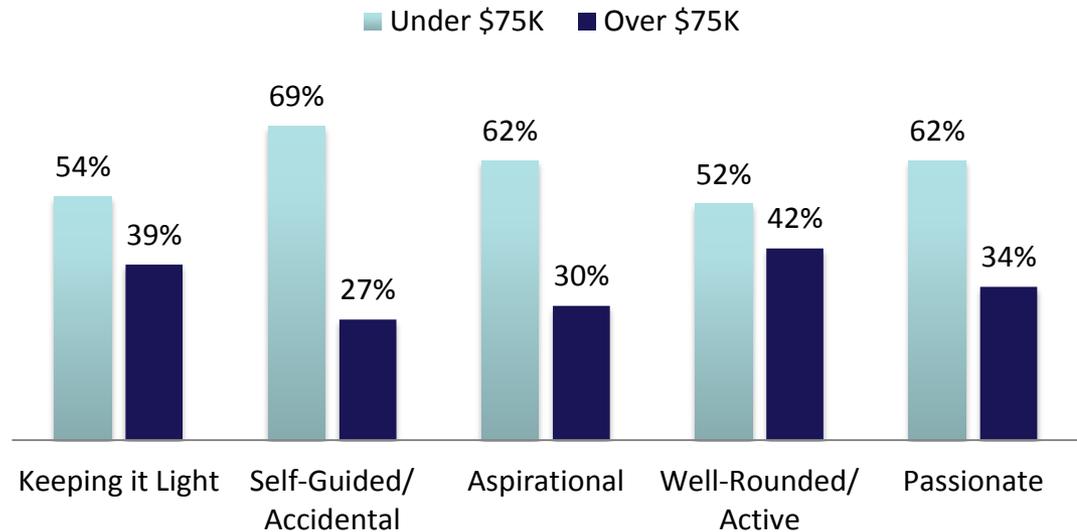
[D58 - AGE] Next, what is your age?

# Segment Demographics (Continued)

## Household Size Mean



## Household Income

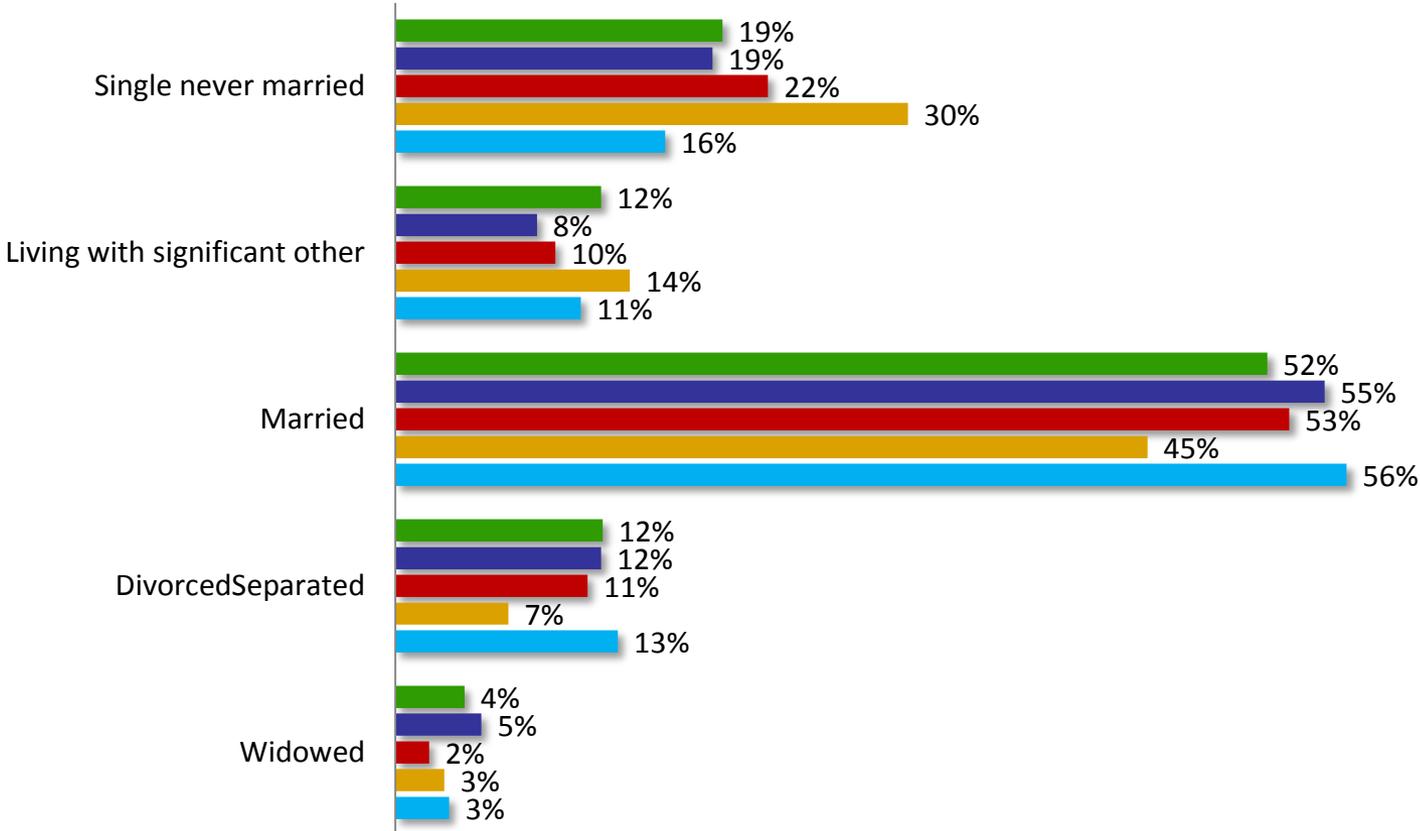


[D62 – HOUSEHOLD SIZE] Please indicate your household size, or the number of people there are in your household .

# Segment Demographics (Continued)

## Marital Status

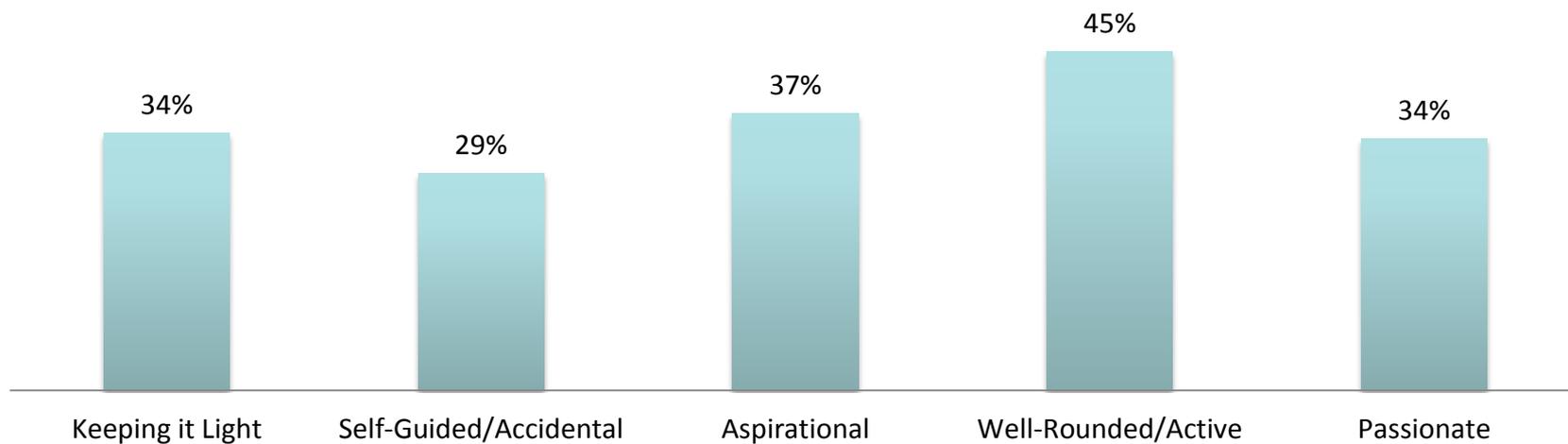
■ Keeping it Light 
 ■ Self-Guided/Accidental 
 ■ Aspirational 
 ■ Well-Rounded/Active 
 ■ Passionate



D61. Which of the following describes your marital status?

# Segment Demographics (Continued)

## Children 18 and Under in 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%

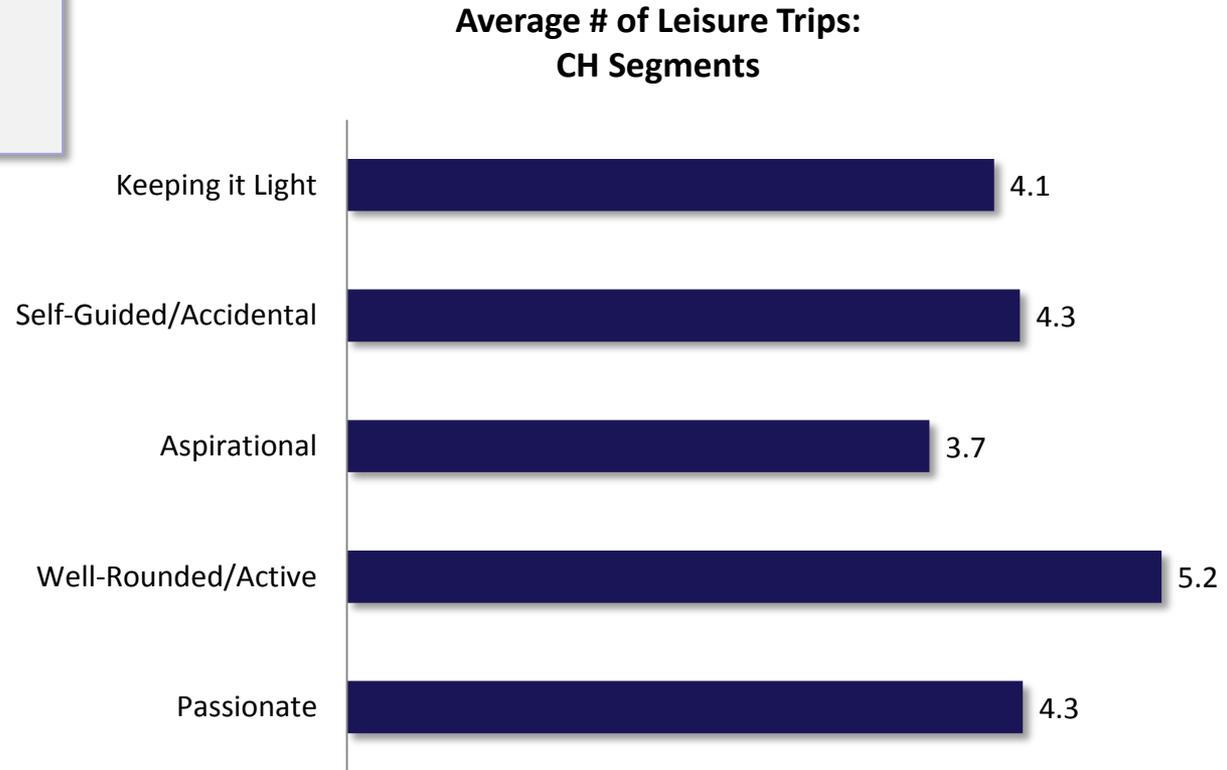
D66. What is the highest level of education that you personally have completed?

D67. What is your current employment status?

# Trip Frequency

# Well Rounded Cultural and Heritage Travelers Travel More Frequently

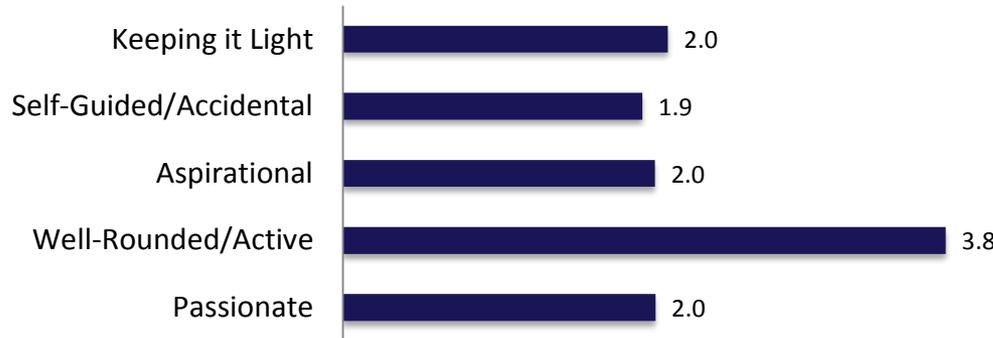
2009 National Segments  
Keeping it Light: 5.4  
Self-Guided/Accidental: 6.61  
Aspiration: 3.61  
Well-Rounded/Active 5.82  
Passionate: 4.87



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

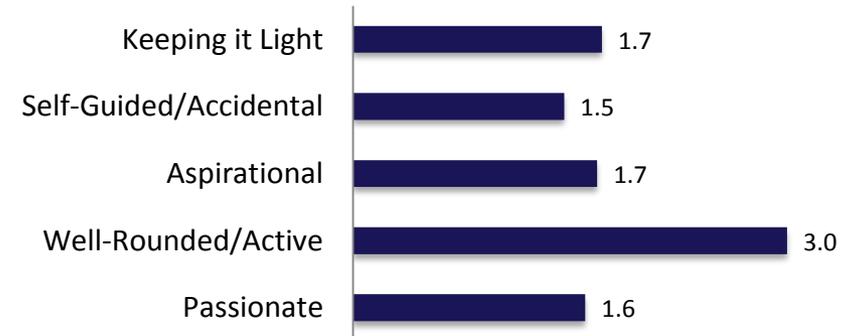
## Combined Leisure and Business Trips CH Segments



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

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

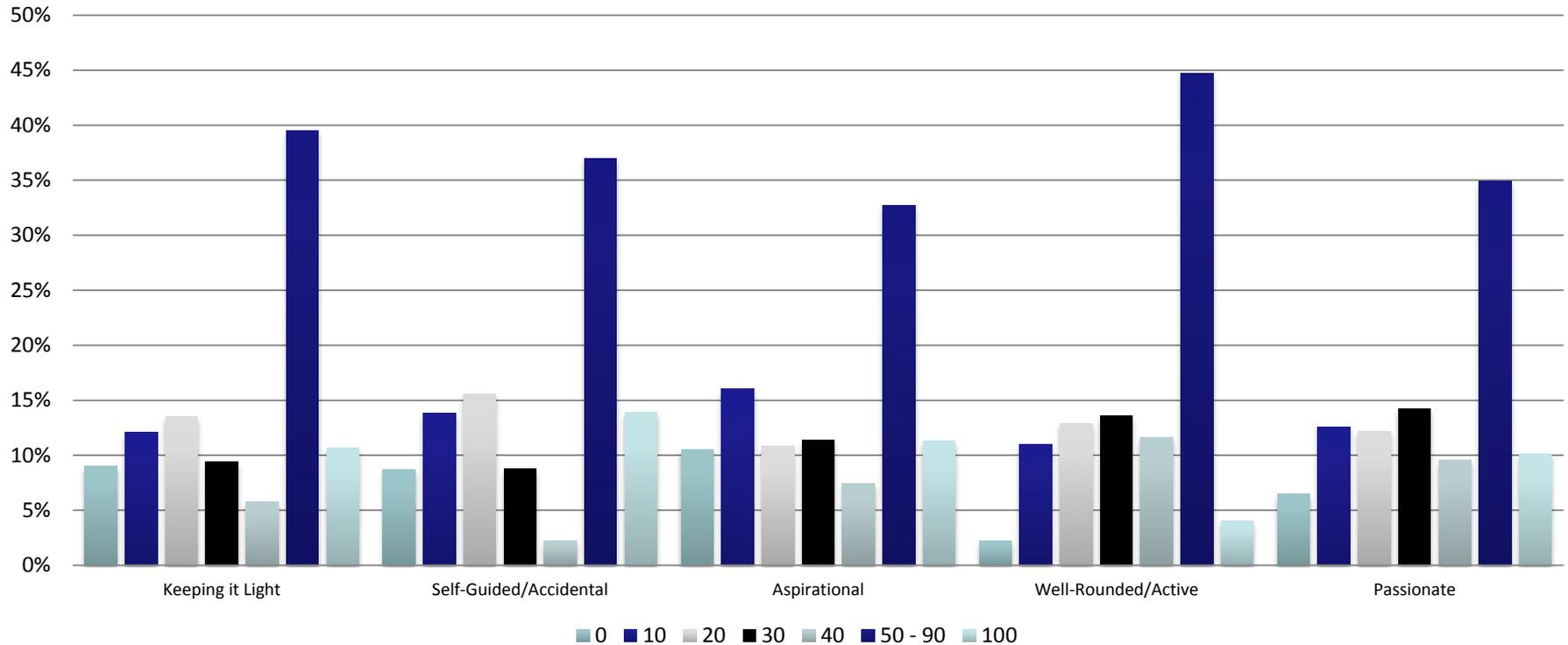
## International Trips CH Segments



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



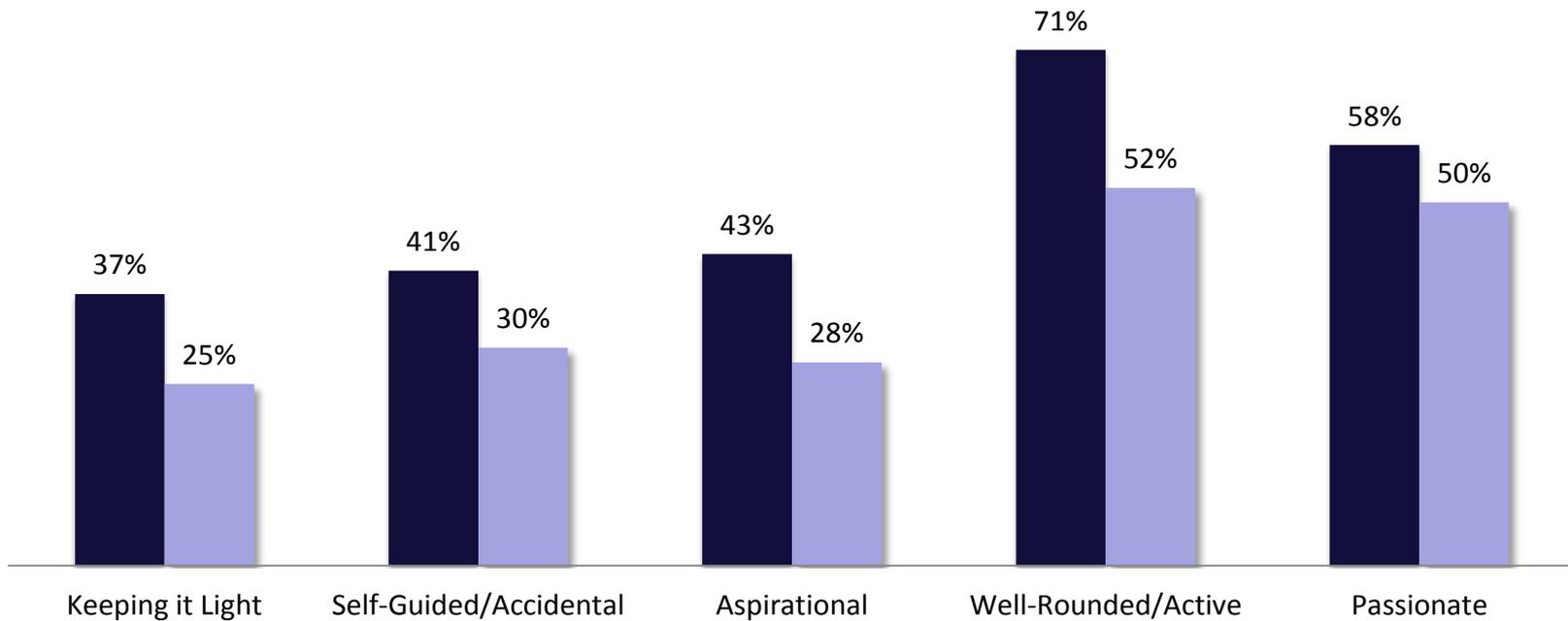
Nationally (2009), Keeping it Light and Self-Guided travelers included personal and leisure activities in their business trips most often.

# 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

■ 2012 Oregon ■ 2009 National

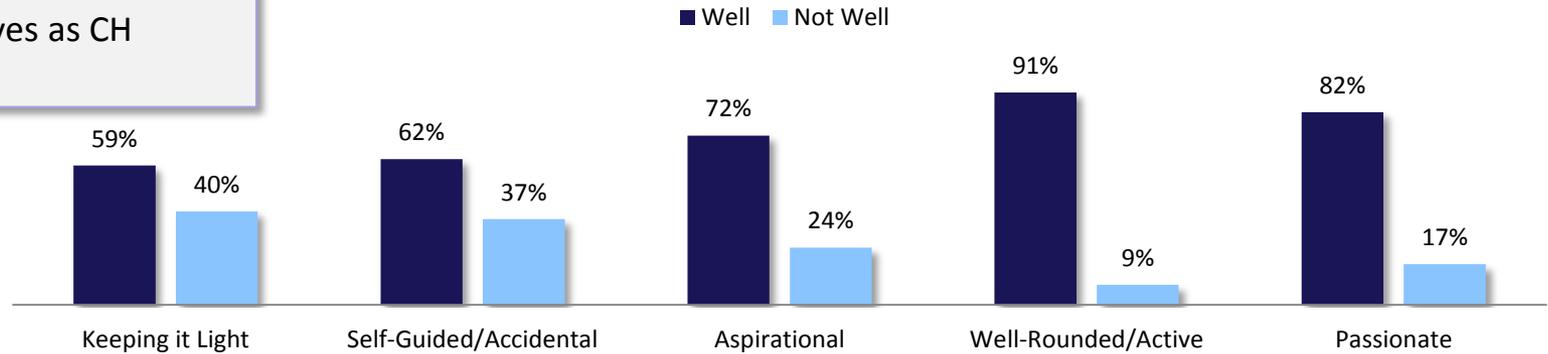


Q6. The term "cultural and/or heritage traveler" is sometimes used to describe certain types of Leisure travelers. Have you ever heard of this term?

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

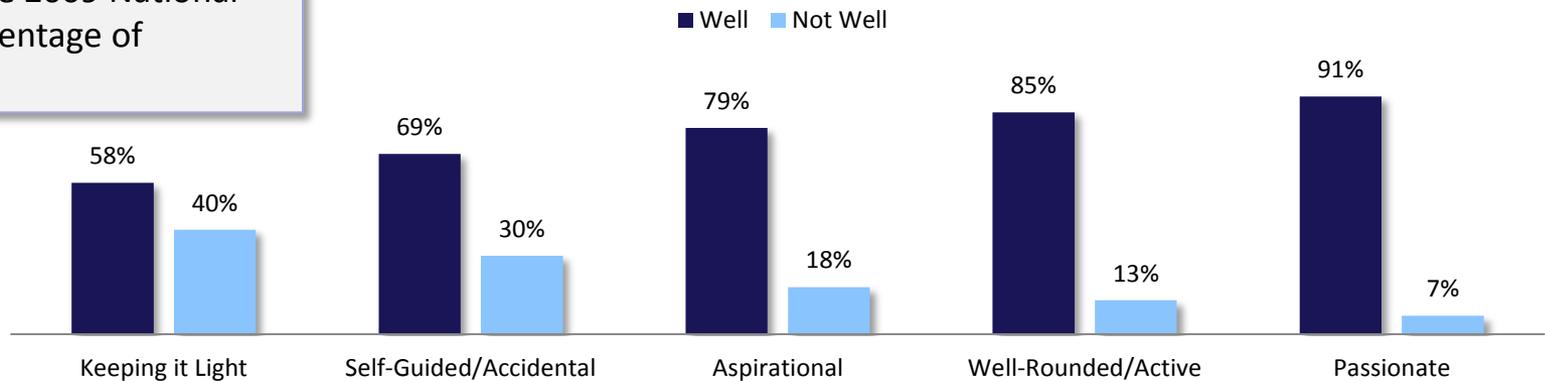
Significant for Oregon is the increase in percentage of Well-Rounded/Active Travelers who define themselves as CH travelers.

## Oregon Define Themselves as Culture and Heritage Travelers



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

## National Study Define Themselves as Culture and Heritage Travelers



[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.

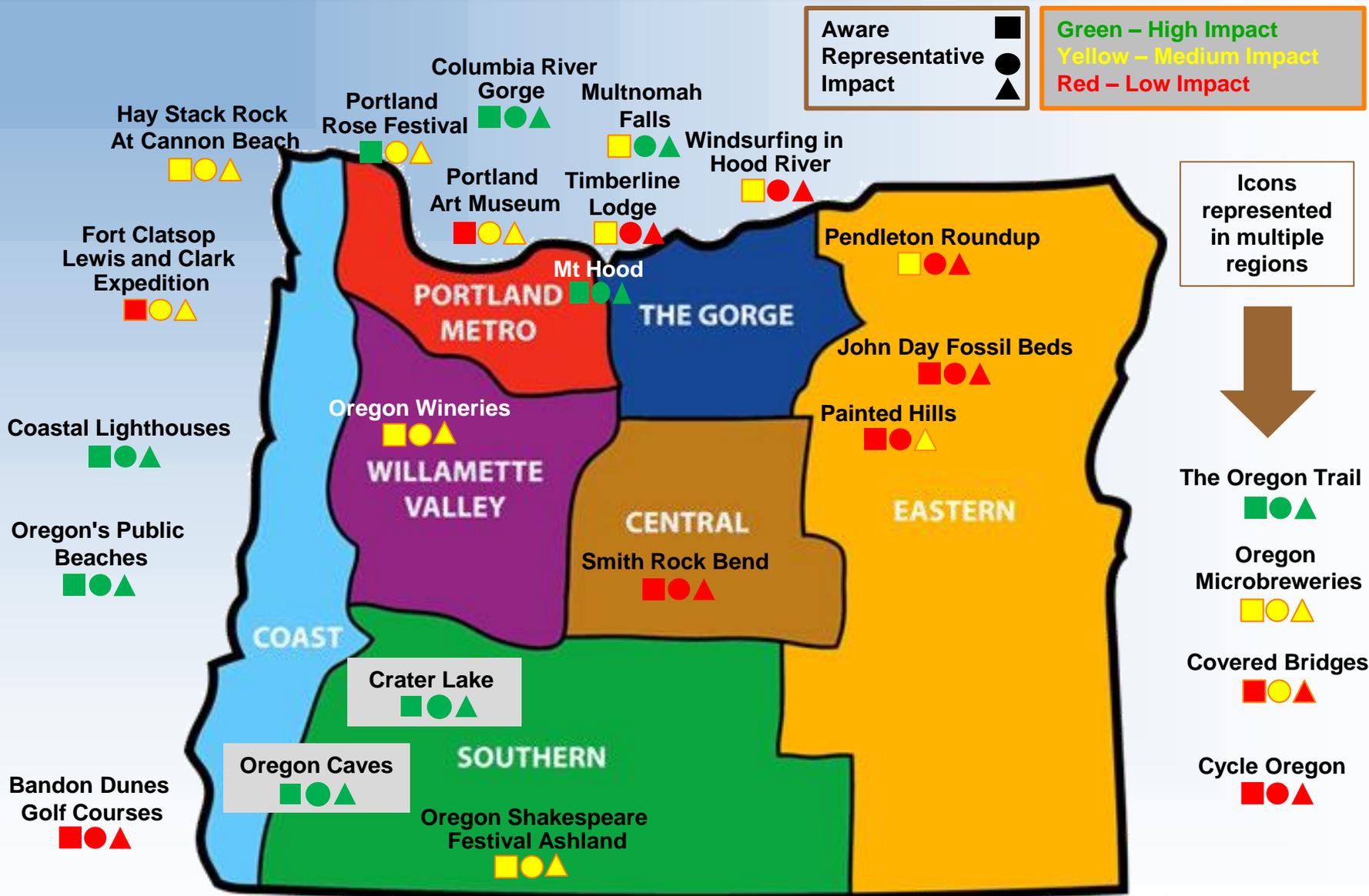
In this framework, “green” denotes an icon that is having more impact than icons with yellow and red indicators. Yellow and red indicators suggest that more work could be done to increase the impact these icons might have on travelers, their perception of Oregon, and their decision to visit the State.

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

# 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

	Keeping it Light	Self-Guided/ Accidental	Aspirational	Well-Rounded Active	Passionate
<b>Sample Size</b>	299	245	327	446	345
Oregon's public beaches	2.3	2.4	2.6	2.6	2.3
Crater Lake	2.7	2.7	2.8	2.9	2.8
The Oregon Trail	3.0	2.6	2.7	2.9	2.9
Oregon Shakespeare Festival Ashland	3.2	3.1	2.6	2.8	3.0
Mt Hood	3.1	3.2	2.8	2.9	2.9
Coastal Lighthouses	2.9	3.0	3.1	3.1	2.8
Hay Stack Rock at Cannon Beach	3.1	3.1	3.3	2.8	2.7
Smith Rock Bend	2.6	2.9	3.4	2.9	3.2
Oregon Wineries	3.1	3.3	2.9	2.8	3.2
Columbia River/Gorge	3.2	3.0	2.9	3.3	2.8
Oregon Microbreweries	2.8	3.2	2.9	3.2	3.5
Fort Clatsop Lewis and Clark expedition	2.9	3.3	3.2	3.0	3.2
Portland Rose Festival	3.2	3.3	3.3	2.9	3.1
Multnomah Falls	3.3	3.3	2.9	3.0	3.3
Timberline Lodge	3.5	2.9	3.5	3.0	2.9
Oregon Caves	3.1	3.2	3.2	3.1	3.2
Painted Hills	3.3	3.1	3.4	3.0	3.1
Windsurfing in Hood River	3.2	2.8	3.3	3.2	3.1
John Day Fossil Beds	3.1	3.4	3.4	2.9	3.5
Portland Art Museum	3.2	3.5	3.6	3.0	3.2
Bandon Dunes Golf Courses	3.1	3.4	3.4	3.3	2.7
Cycle Oregon	3.0	3.6	3.2	3.4	3.3
Pendleton Roundup	3.1	3.1	3.3	3.3	3.9
Covered Bridges	3.4	3.6	3.5	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%

# 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

	Keeping it Light	Self-Guided/ Accidental	Aspirational	Well-Rounded Active	Passionate
Sample Size	299	245	327	446	345
The Oregon Trail	2.4	2.6	2.3	2.8	2.4
Mt Hood	2.7	2.6	2.7	2.7	2.7
Oregon's public beaches	2.6	2.7	2.7	2.8	2.7
Crater Lake	2.7	2.7	2.8	2.9	2.9
Hay Stack Rock at Cannon Beach	2.7	2.7	3.1	3.0	2.2
Fort Clatsop Lewis and Clark expedition	3.2	3.6	3.2	2.7	2.7
Columbia River Gorge	3.2	2.9	3.0	2.9	3.1
Coastal Lighthouses	2.9	3.3	3.3	3.0	2.8
Oregon Shakespeare Festival Ashland	3.1	3.2	3.1	2.9	3.2
Multnomah Falls	3.4	3.2	3.0	2.9	3.1
Oregon Caves	3.2	2.9	3.1	3.2	3.4
Portland Rose Festival	3.1	3.4	3.3	3.2	3.0
Oregon Wineries	3.3	3.7	3.2	2.9	3.6
Timberline Lodge	3.0	3.6	3.4	3.2	3.3
Portland Art Museum	3.1	3.4	3.3	3.2	3.6
Cycle Oregon	2.8	4.5	3.9	2.9	4.1
Painted Hills	4.0	2.7	3.5	3.4	3.3
Windsurfing in Hood River	3.7	3.8	3.5	3.1	3.2
Bandon Dunes Golf Courses	3.7	2.8	3.3	3.5	3.3
Covered Bridges	3.6	3.8	3.2	3.2	3.4
John Day Fossil Beds	3.5	3.0	3.7	3.4	3.4
Oregon Microbreweries	3.3	3.7	3.6	3.2	3.5
Pendleton Roundup	3.6	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 then 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	Keeping it Light	Self-Guided/ Accidental	Aspirational	Well-Rounded Active	Passionate
Sample Size	299	245	327	446	345
Vacation	72%	74%	67%	79%	80%
Visiting friends and relatives	62%	64%	55%	66%	65%
Weekend getaway	52%	43%	40%	59%	59%
Family Reunion	27%	19%	23%	39%	30%
Wedding	17%	11%	14%	31%	22%
Sports event	15%	15%	10%	27%	13%
Girlfriend getaway	17%	7%	12%	23%	14%
Visit a cultural/heritage site	6%	12%	8%	25%	18%
Getaway with the guys	12%	5%	6%	20%	8%
Church/religious outing	5%	8%	4%	16%	10%
School reunion	3%	2%	4%	15%	6%
Sorority /Fraternity	1%	4%	1%	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	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded/Active	Passionate
<b>Sample Size</b>	299	245	327	446	345
Took a scenic drive	54%	55%	40%	60%	65%
Shopped (general, not locally made crafts/memorabilia)	55%	48%	36%	64%	60%
Explored small towns	39%	39%	28%	53%	54%
Self-guided walking tour	34%	38%	31%	57%	45%
Visited beaches/waterfronts	35%	35%	22%	53%	43%
Shopped at an outlet mall	40%	28%	28%	52%	39%
Shopped for items made by local artisans and craftspeople	25%	30%	19%	58%	48%
Went to a fine dining restaurant for a unique and memorable experience	34%	22%	21%	50%	30%
Experienced local or regional cuisine for a unique and memorable experience (not fine dining)	32%	19%	20%	50%	38%
Visited state/national parks	21%	40%	14%	49%	36%
Visited heritage buildings/historical buildings	9%	39%	13%	49%	44%
Visited a local farmers market	29%	20%	14%	48%	34%
Visited historic sites	10%	38%	10%	47%	39%
Participated in night life	36%	13%	16%	46%	23%
Explored urban neighborhoods	23%	22%	15%	45%	32%
Visited art museums/galleries	14%	34%	12%	46%	34%
Gambled	29%	23%	15%	36%	19%
Sampled traditional artisan products (e.g. cheeses, candies, jams, etc.)	23%	10%	11%	48%	34%
Participated in sports (golf, hiking, biking, birding, boating/sailing, hunting, fishing, snow sports, etc.)	21%	19%	12%	37%	22%
Shopped for gourmet food and wine	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	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded/Active	Passionate
Sample Size	299	245	327	446	345
Visited heritage buildings/historical buildings	67%	52%	41%	34%	61%
Visited Native American sites	62%	44%	41%	40%	55%
Attended cultural and/or heritage fair or festival	64%	48%	39%	35%	55%
Attended historical re-enactments	64%	42%	39%	38%	55%
Visited historic sites	61%	46%	41%	31%	55%
Participated in an organized tour of local history or culture	65%	41%	38%	38%	51%
Visited living history museums	63%	38%	38%	32%	51%
Visited history museums/centers	60%	45%	38%	29%	50%
Visited natural history museums/centers	62%	40%	37%	30%	49%
Visited art museums/galleries	57%	44%	35%	29%	52%
Took a tour focusing on local architecture	58%	40%	33%	26%	46%
Researched family history	53%	33%	33%	33%	44%
Attended an art/craft fair or festival	40%	34%	30%	26%	38%
Shopped for items made by local artisans and craftspeople	37%	36%	29%	24%	41%
Visited science museums/centers	44%	27%	31%	23%	36%
Visited children's museums	44%	25%	27%	28%	26%
Visited farms and ranches	38%	24%	28%	26%	24%
Explored small towns	26%	29%	24%	21%	34%
Attended the theatre/play/opera	35%	23%	22%	20%	32%
Attended a professional dance performance	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%	7%
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%	17%
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%	7%
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%	8%
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%	19%
Visited beaches/waterfronts	43%	9%	34%
Visited theme or amusement parks	30%	9%	20%
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	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded/Active	Passionate
Sample Size	299	245	327	446	345
I prefer taking trips that are a combination of a wide variety of activities such as culture shopping nature exercise	81%	70%	87%	84%	91%
I like to bring back local/regional memorabilia from the places I visit and share them with my friends and family	76%	69%	77%	81%	84%
I believe tasting foods/wines of the region I'm visiting is an important part of the cultural and/or heritage travel experience	70%	53%	75%	82%	76%
I seek travel experiences where the destination its buildings and surroundings have retained their historic character	57%	64%	70%	79%	76%
I like to pursue a life of challenge novelty and change	61%	52%	64%	77%	70%
I want my travel to always be educational so I make an effort to explore and learn about the local arts culture environment	45%	56%	60%	73%	68%
I am willing to pay more for travel experiences that do not harm the environment	51%	40%	59%	71%	58%
I spend more money on cultural and/or heritage activities while I am on a trip	34%	36%	48%	65%	61%
I would pay more for lodging that reflects the cultural and/or heritage destination I am visiting	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

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%

Enriching relationships ranked 3<sup>rd</sup> in 2009 National Survey.

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%

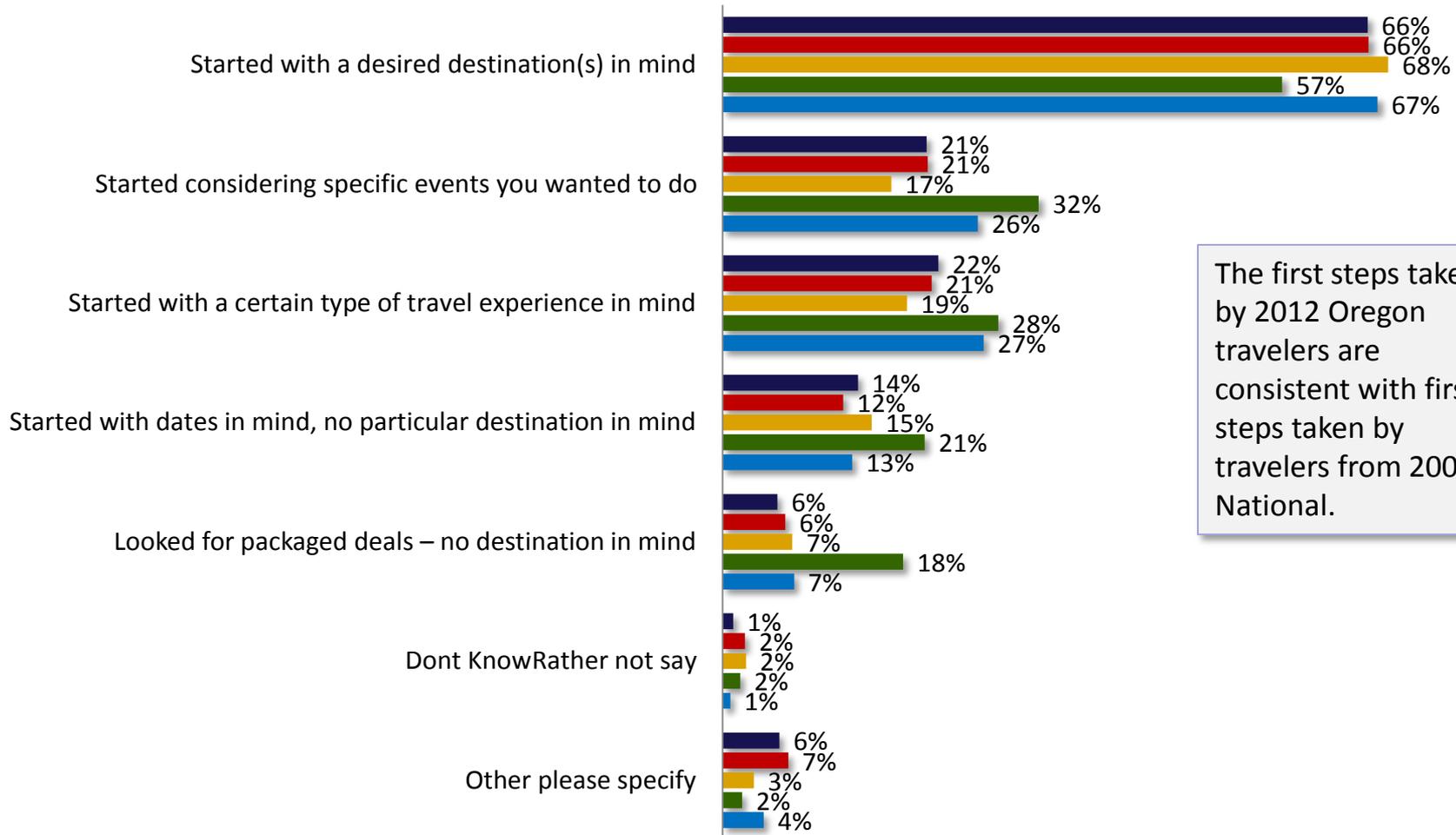
Q40. When planning your vacation, which of the following is most important to you and which is least important? Please rank them on a 1 to 4 scale, where 1 is the most important factor and 4 is the least important factor.

# Trip Planning

# All Segments Start with a Desired Destination in Mind When Planning Their Leisure Trips

## First Steps In Choosing A Destination

■ Keeping it Light  
 ■ Self-Guided/Accidental  
 ■ Aspirational  
 ■ Well-Rounded/Active  
 ■ Passionate



The first steps taken by 2012 Oregon travelers are consistent with first steps taken by travelers from 2009 National.

Q11. What was your first step when selecting the destinations of this most recent trip?

# Technology and Family and Friends Are the Most Prominent Planning Sources for Trip Planning Information

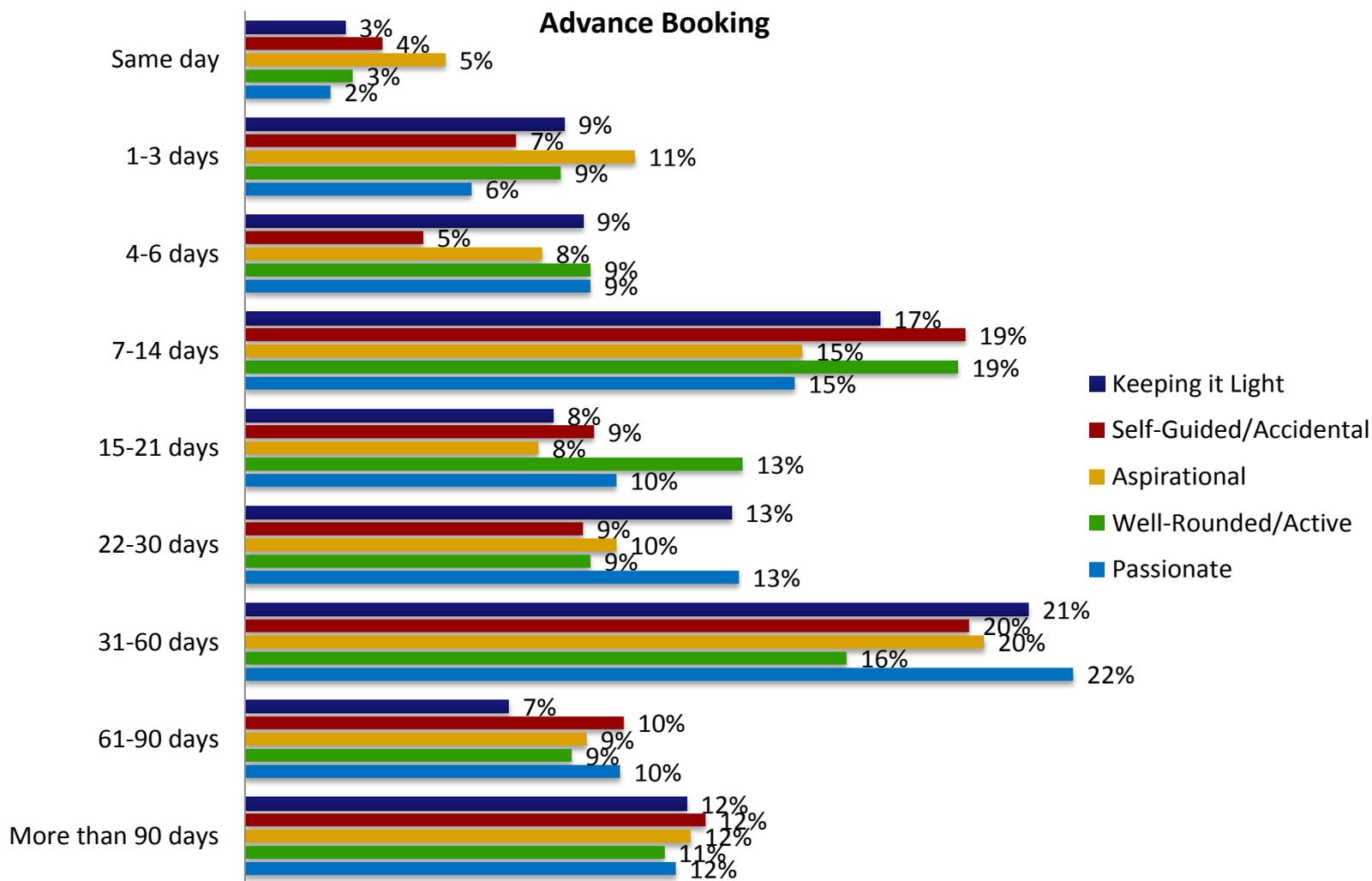
Gathering Information	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded/Active	Passionate
Sample Size	299	245	327	446	345
I go directly to the websites of the destination I am thinking of visiting	66%	65%	55%	53%	73%
I get recommendations from friends and family members (word-of-mouth)	67%	58%	50%	55%	69%
I conduct a general web search, such as with Google or Yahoo	62%	54%	46%	50%	68%
I do research on 3rd party travel websites such as Orbitz.com, Expedia.com or Travelocity.com	41%	31%	30%	39%	42%
I read online reviews by "official sources" of the destination I am thinking of visiting	30%	24%	21%	38%	35%
I read user generated sources (Trip Advisor, Virtual Tourist, etc.) for the destination I am thinking of visiting	22%	21%	18%	29%	34%
I read travel and travel related magazines	21%	9%	15%	34%	25%
I request that brochures and information be sent to me in the mail of the travel destinations I am thinking of visiting	16%	17%	12%	25%	31%
I read the travel section of my newspaper	18%	6%	13%	23%	20%
I read independently published reviews in magazines and newspapers of the destination I am thinking of visiting	14%	10%	10%	25%	23%
I ask my friends on Facebook	17%	8%	11%	27%	17%
I consult with a travel agent	10%	7%	12%	25%	9%
I contact convention and visitors bureaus	5%	8%	7%	17%	12%
I do a search on Facebook	7%	1%	3%	11%	6%
Other	4%	8%	6%	1%	5%

Findings are generally consistent with 2009 National data

[Q28B – PLAN VACATION] How do you typically gather information about leisure trips you plan to take within the United States? Please select all that apply.

# Booking Behavior

# Approximately Half of These Travelers Book Within Three Weeks of Their Trip



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

# Well Rounded Travelers are Twice as Likely to Use On-Line Travel Agencies to Book Flights and the Least Likely to *Not* Fly

Well-Rounded/Active travelers are also twice as likely to use a traditional travel agent when compared to total sample

	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded Active	Passionate
Used online travel agency: Expedia/Orbitz/Travelocity etc	15%	14%	14%	28%	15%
Booked directly via website	12%	10%	15%	15%	13%
Used traditional travel agent	5%	6%	10%	16%	4%
Booked directly with travel by telephone	4%	3%	2%	6%	2%
Booked directly with travel online	4%	2%	4%	3%	3%
Booked through the destinations website	1%	1%	1%	3%	1%
Booked in person after arrival	2%	0%	0%	2%	0%
Not applicable	57%	65%	54%	27%	62%

The respondents in the National sample in 2009 booked directly with the travel company online more often. Oregon 2012 travelers used online travel agencies more often.

Well-Rounded/Active Travelers booked other modes of transport twice as much as other segments

Other Transport	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded Active	Passionate
	299	245	327	446	345
Booked directly via website	12%	6%	10%	18%	11%
Used online travel agency Expedia/Orbitz/Travelocity etc	7%	9%	9%	20%	8%
Used traditional travel agent	4%	4%	7%	14%	4%
Booked in person after arrival	7%	8%	6%	7%	6%
Booked directly with travel by telephone	3%	2%	3%	6%	3%
Booked directly with travel online	2%	1%	2%	4%	1%
Booked through the destinations website	1%	4%	2%	2%	1%
Not applicable	65%	66%	61%	29%	66%

Oregon 2012 travelers are more likely to book other modes of transportation than the 2009 National sample.

# Travelers Are Most Likely to Book Their Activities Once They Arrive at Their Destination But Are Less Spontaneous About Booking Lodging

Ensuring that travelers know the activities available when they arrive is critical, most do not book ahead of time.

Activities	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded/ Active	Passionate
Sample Size	299	245	327	446	345
Booked in person after arrival	28%	26%	15%	15%	31%
Booked directly via company website	10%	9%	10%	22%	9%
Used online travel agency Expedia/ Orbitz/ Travelocity/ etc.	5%	2%	7%	17%	5%
Used traditional travel agent	3%	4%	6%	13%	3%
Booked through the destinations website	5%	4%	4%	6%	6%
Booked directly with travel company by telephone	3%	3%	2%	6%	3%
Booked directly with travel company online	2%	1%	1%	3%	0%
Not applicable	44%	52%	56%	18%	43%

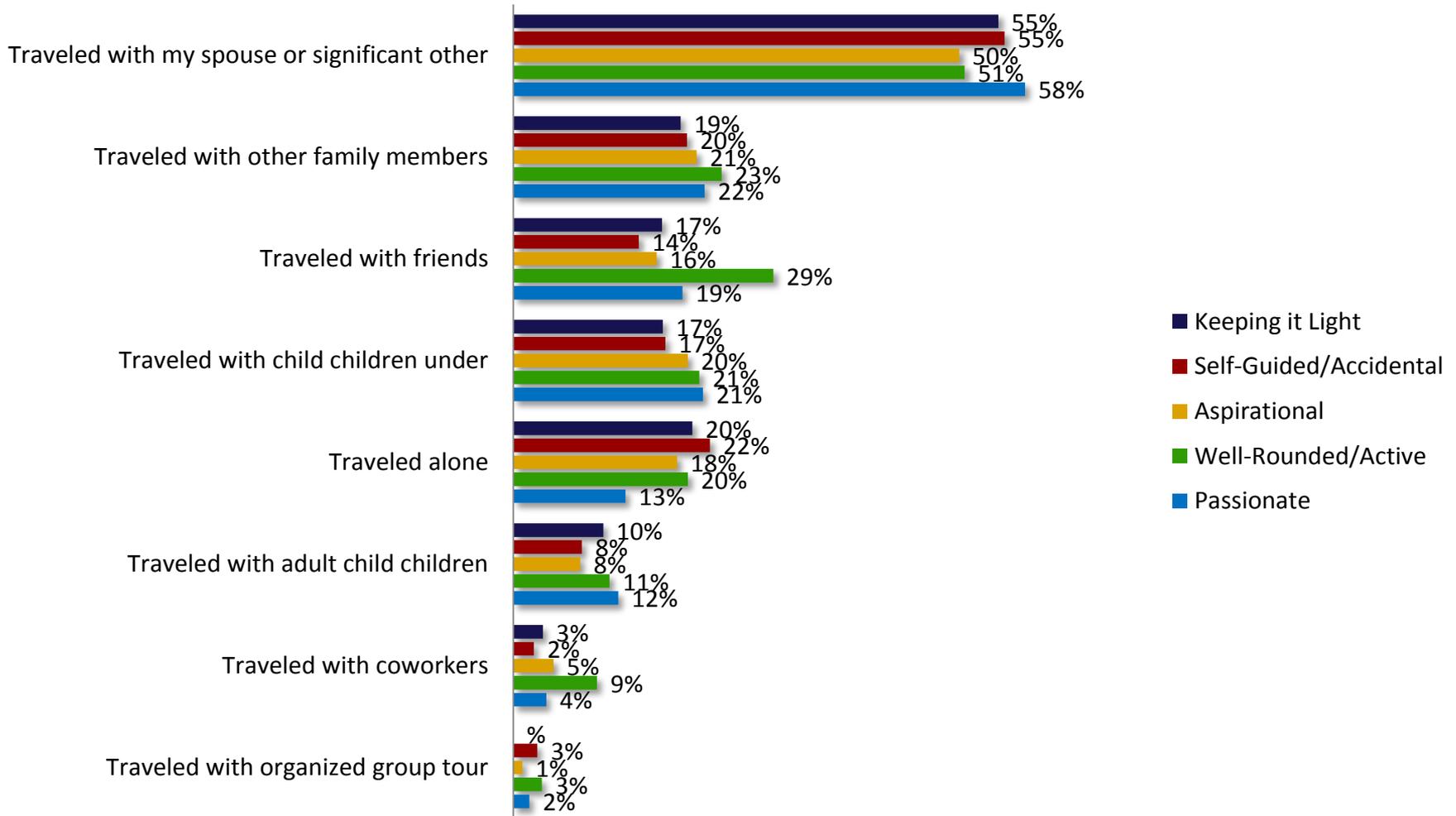
Lodging	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded/ Active	Passionate
Sample Size	299	245	327	446	345
Booked directly via website	18%	19%	19%	22%	19%
Used online travel agency Expedia/ Orbitz/ Travelocity/ etc .	16%	15%	16%	27%	17%
Booked through the destinations website	13%	10%	9%	8%	12%
Booked in person after arrival	12%	16%	5%	6%	11%
Used traditional travel agent	5%	4%	9%	13%	5%
Booked directly with travel by telephone	6%	6%	6%	7%	8%
Booked directly with travel online	4%	1%	2%	4%	2%
Not applicable	27%	30%	33%	14%	27%

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

# Travel Party Composition

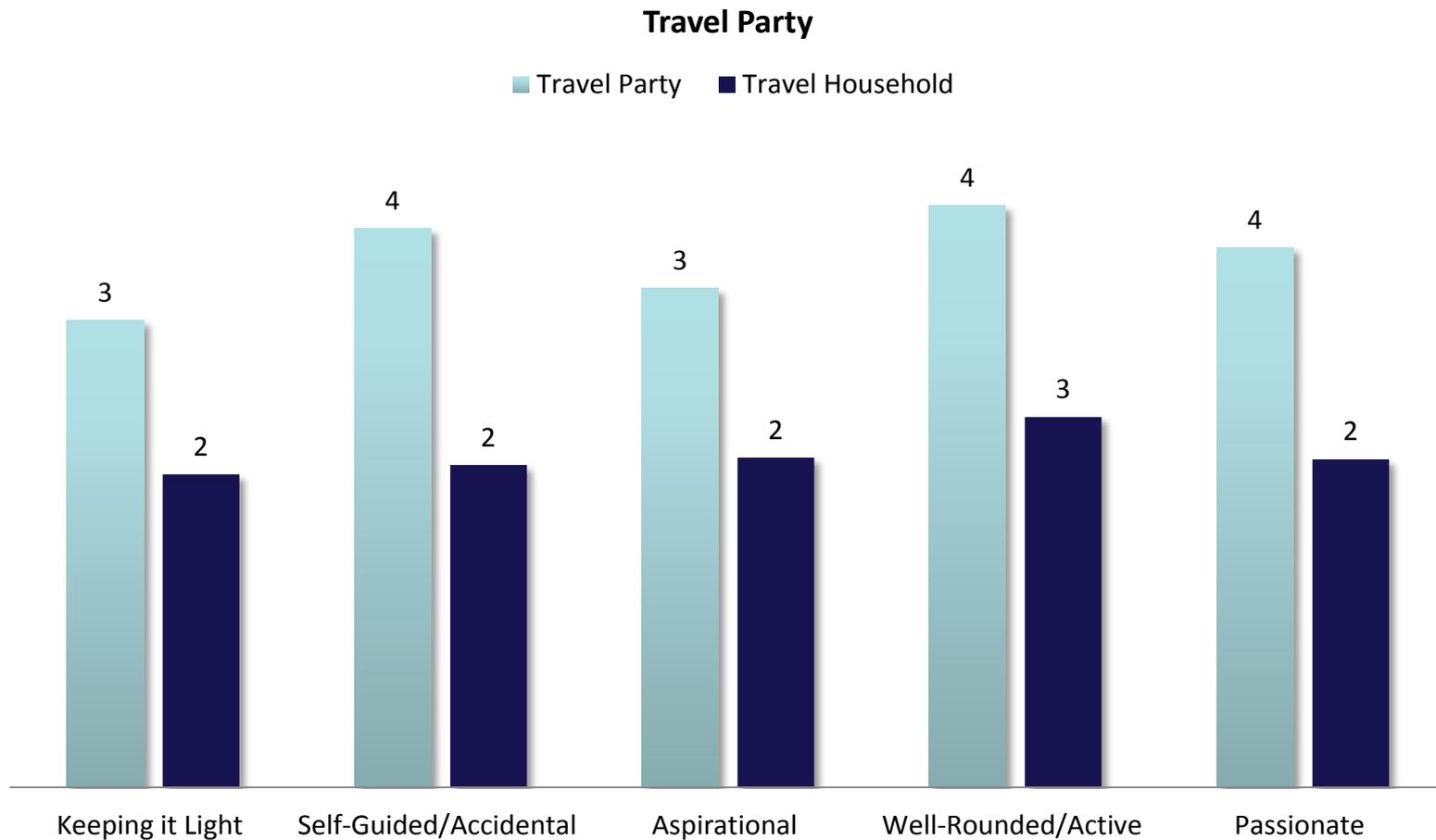
# Well-Rounded/Active Travelers Are Considerably More Likely to Travel with Friends than With Other Family Members

Who They Traveled With



Q13. And, with whom did you travel on this most recent trip?

# On Their Most Recent Trip, Well Rounded Respondents Travelled with an Additional Household Member



Q13b. Including yourself, how many people were in your travel party on this most recent trip? Please include people from your household and friends/family who accompanied you but not those whom you met as part of a group tour.

Q13c. And, including yourself, how many people from your household were on this most recent trip?



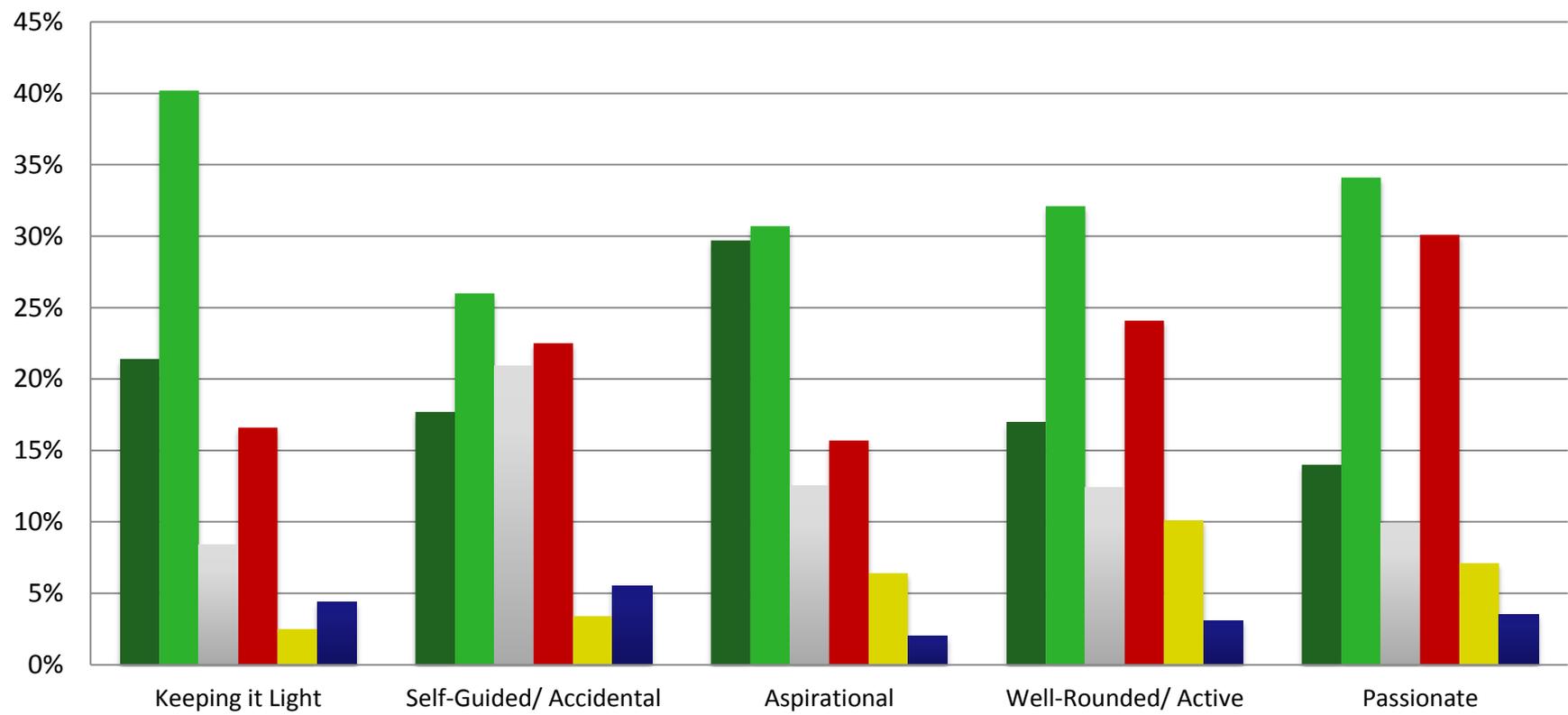
# Length of Stay

# Keeping it Light Travelers Are More Likely to Take Long Weekends Giving Oregon the Opportunity to Provide Short Trip Itineraries on Their Website

Across the board, very low percentages of travelers take more than a two week long trip, this is consistent with 2009 National – long weekends are most common.

## Length of Cultural and Heritage Trip

- Weekend
- Long weekend 3-4 days
- During the work week 2-5 days
- Week long trip
- Two week long trip
- More than a two week long trip

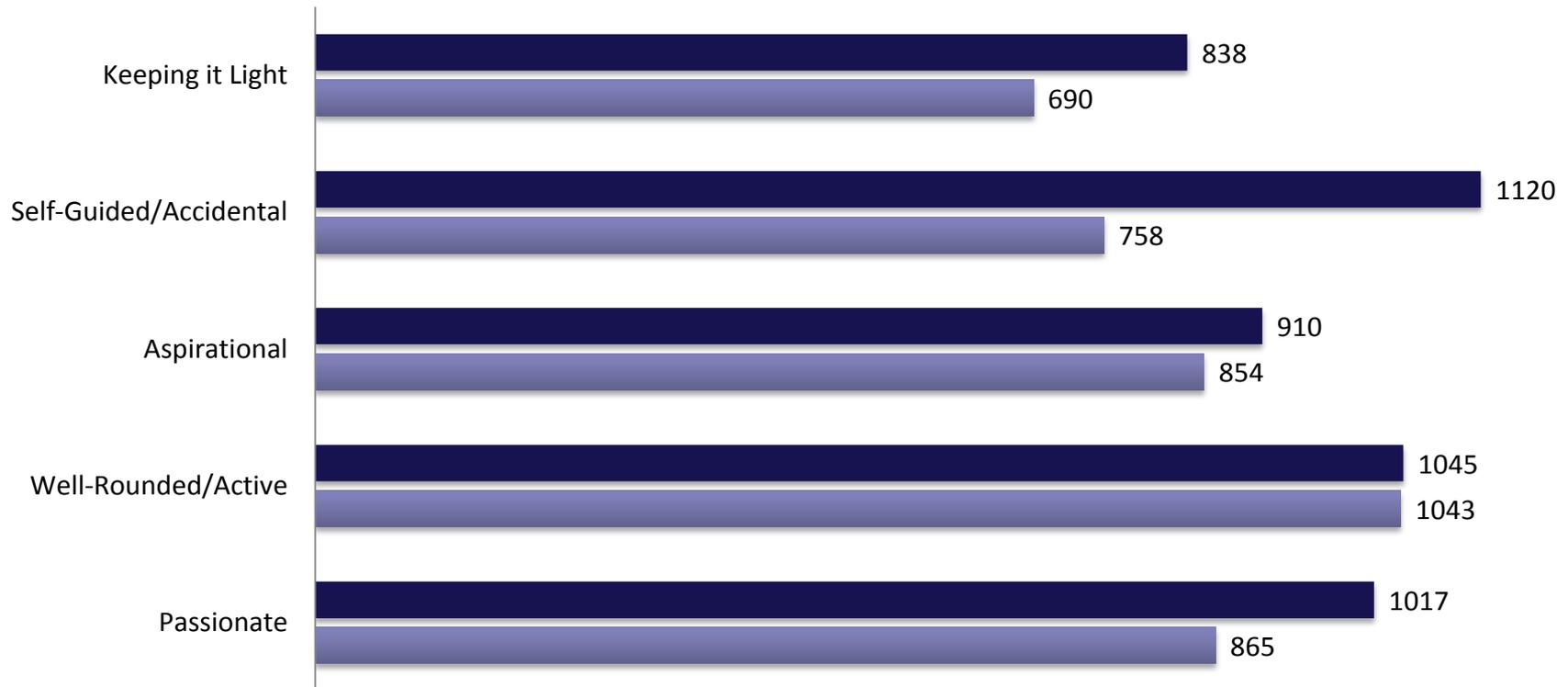


# Well Rounded Travelers Consistently Travel Further than Other Segments

Except for Well Rounded, all of the Oregon 2012 survey segments traveled further than those in the 2009 national survey.

## Miles Traveled

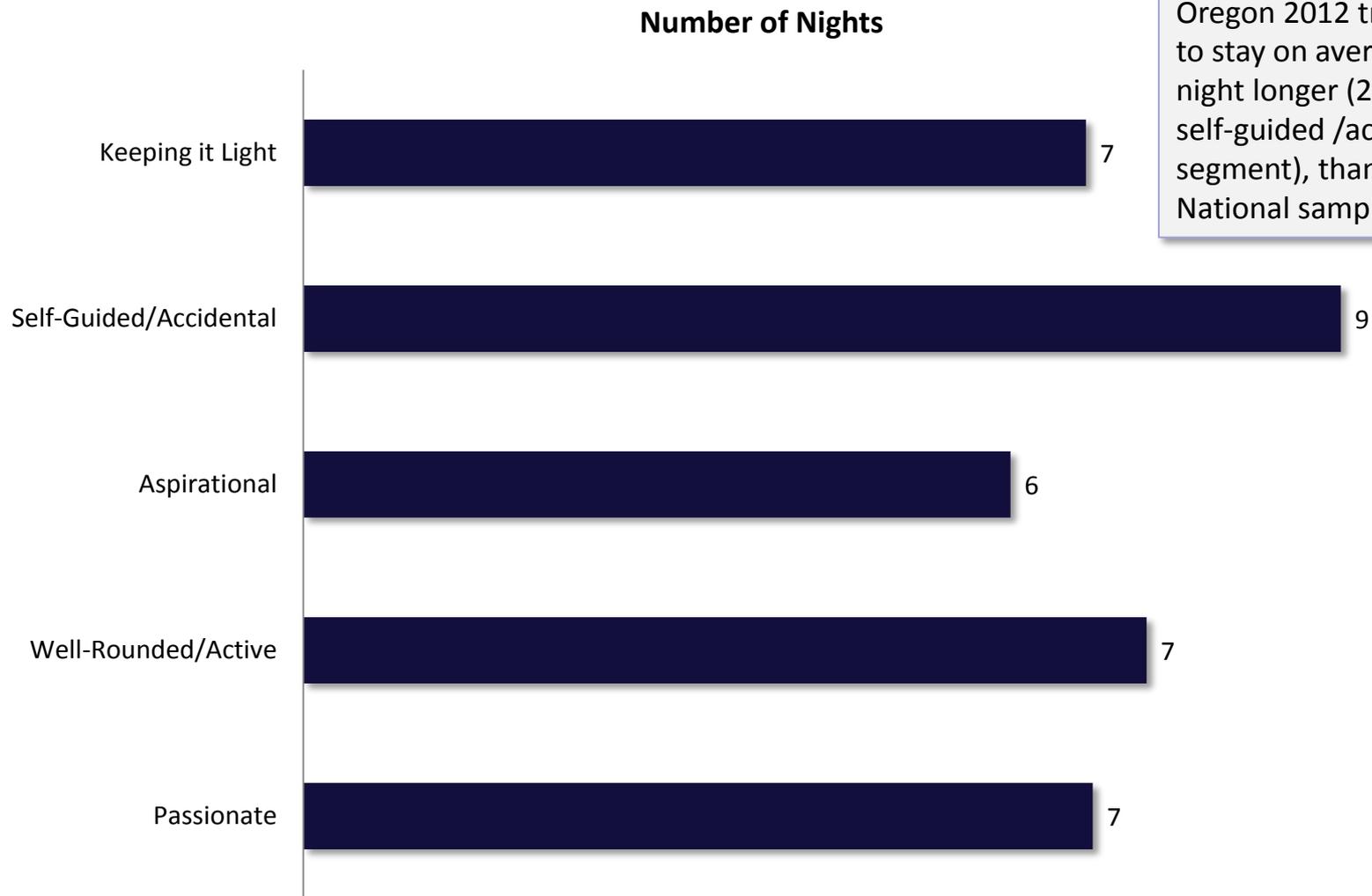
■ 2012 ■ 2009



[Q18 – MILEAGE] 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.



# Self-Guided/Accidental Travelers Spend Nearly Two Additional Overnights on Their Most Recent Trip Than Those in Other Segments



Oregon 2012 travelers tend to stay on average one night longer (2 nights for self-guided /accidental segment), than 2009 National sample travelers.

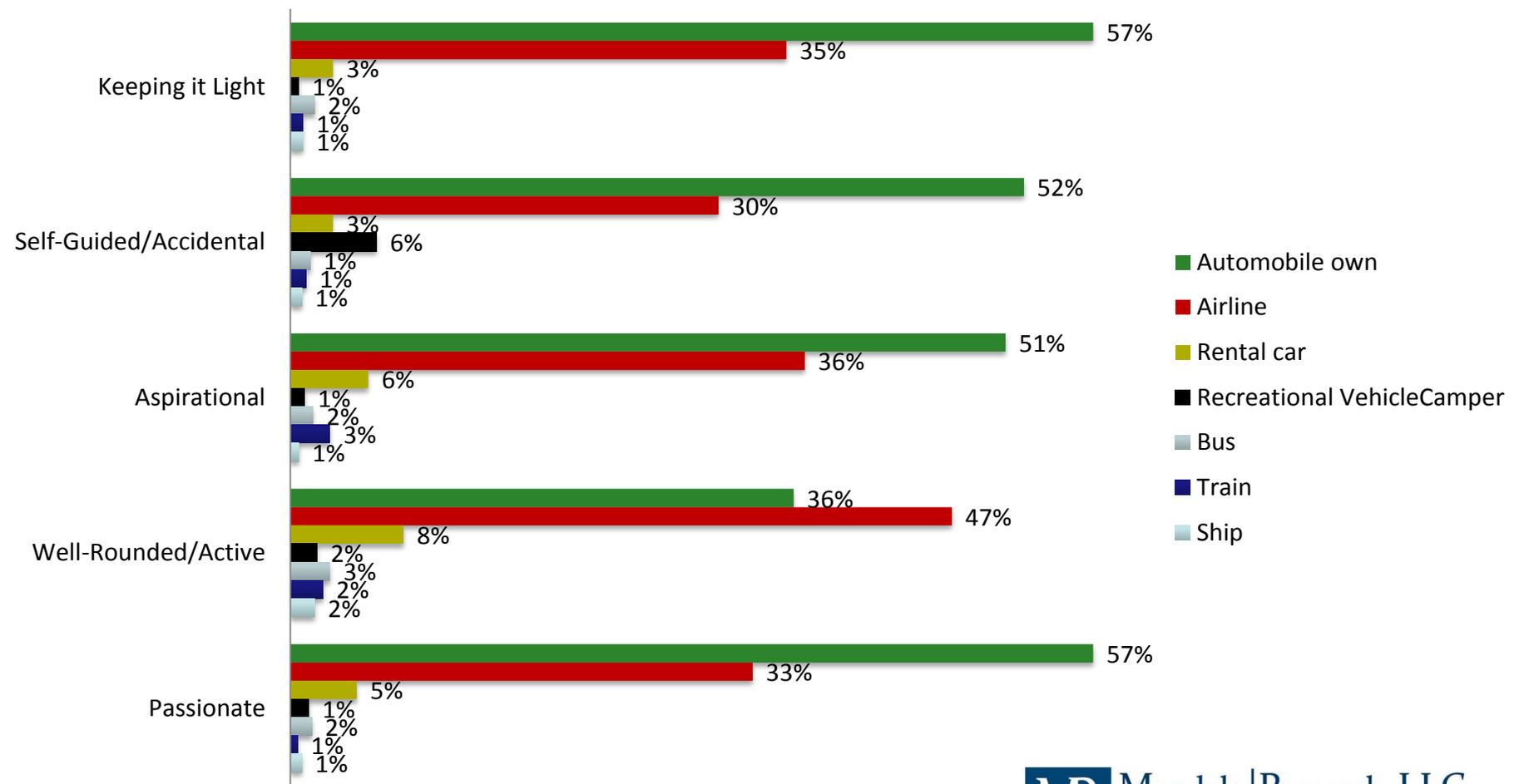
[Q14 – LENGTH OF STAY] How many overnights did you stay while on this trip?

# Mode of Transportation

# The Only Segment Who Flies More Often Than Drives is “Well Rounded”

There are some notable differences in transportation mode when comparing 2009 National CH Travelers. That study found 66% of Keeping It Light travelers, 65% of Self-Guided/Accidental, 50% of Well-Rounded/Active, drove their own cars. 34% of Well-Rounded/Actives and 26% of Passionate travelers flew

**Mode of Transport on Most Recent Trip**

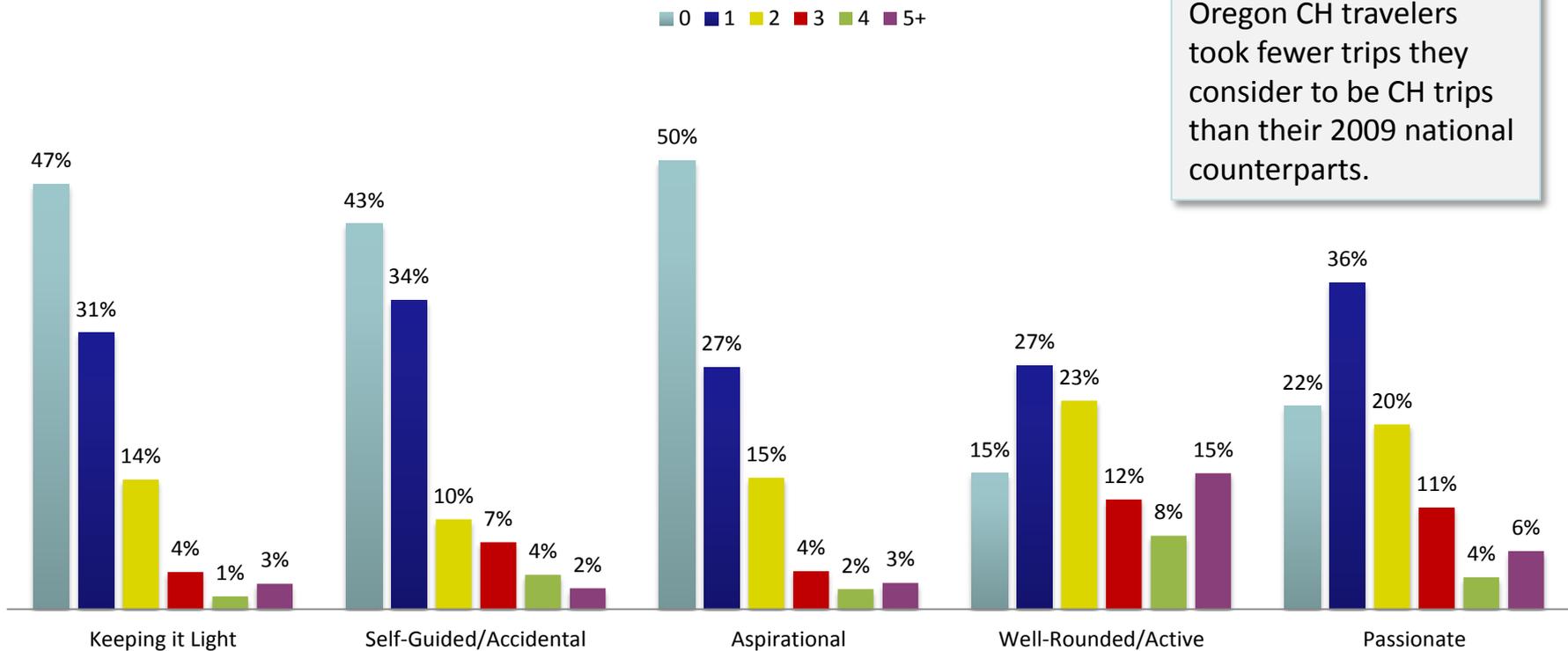


Q19. Which of the following was your primary mode of transportation to get to the destination of your most recent trip?

## Recent Trips

# More Well-Rounded/Active Travelers Took 5 or More Trips Considered to be Cultural and Heritage Journeys

Number of Trips They Consider CH Trips



Across the segments (except for well-rounded/actives), Oregon CH travelers took fewer trips they consider to be CH trips than their 2009 national counterparts.

Q36. Thinking about the leisure trips you took in the US in the past 12 months, how many of those would you describe as cultural and/or heritage trips?

# Oregon Ranks High in Most Recently Visited States

States Visited on Most Recent Trip	Keeping it Light	Self-Guided/ Accidental	Aspirational	Well-Rounded/ Active	Passionate
<b>Sample Size</b>	1350	300	1360	598	981
California	29%	21%	28%	36%	28%
Washington	25%	19%	19%	22%	20%
Nevada	20%	21%	16%	19%	19%
Oregon	18%	18%	13%	17%	21%
Idaho	10%	16%	9%	8%	17%
Utah	14%	11%	8%	9%	14%
New York	5%	8%	6%	17%	8%
Florida	7%	5%	8%	15%	6%
Arizona	6%	9%	6%	11%	8%
Montana	5%	8%	5%	8%	13%
Hawaii	4%	3%	7%	13%	6%
Colorado	4%	6%	4%	8%	6%
Texas	3%	5%	4%	9%	4%

# Accommodations

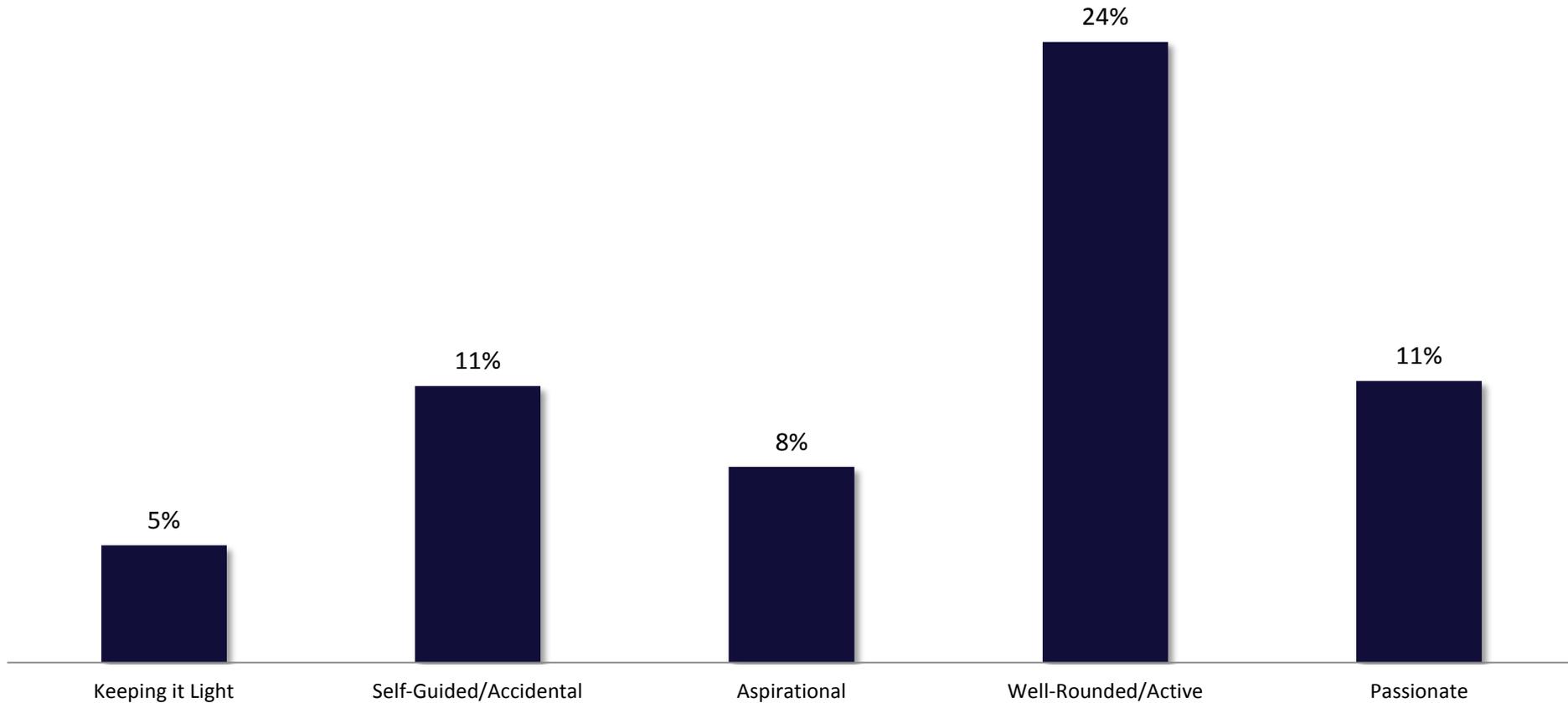
# Well-Rounded/Active Travelers Are Somewhat More Likely to Stay in a Hotel/Motel/Resort Than Those in Other Segments

	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded Active	Passionate
Sample Size	283	222	307	425	336
Hotel/Motel/Resort	62%	63%	56%	69%	62%
Stay with family or friend	29%	35%	26%	31%	36%
Recreational Vehicle/Camper/ Tent	7%	11%	6%	10%	11%
Bed and Breakfast	5%	6%	4%	17%	5%
Rental condominium Rental town home Rental house	7%	4%	5%	10%	7%
Owned home/condominium/town home/apartment	3%	5%	5%	8%	4%
Timeshare	6%	3%	4%	7%	7%
Took a cruise	3%	5%	4%	9%	4%
Other please specify	1%	3%	3%	1%	1%

In 2009 National, 54% of Keeping it Light travelers stayed in hotels, motels or resorts, self-guided/accidental 68%, aspirational 58%, and 67% of well-rounded/active and passionate travelers used these types of accommodation for their stay. Aspirational travelers are staying with friends and family less than they did in 2009 (37%).

# Well-Rounded/Active Segment Are Much More Likely to Stay in a Historic Property

Stayed In an Historic Property

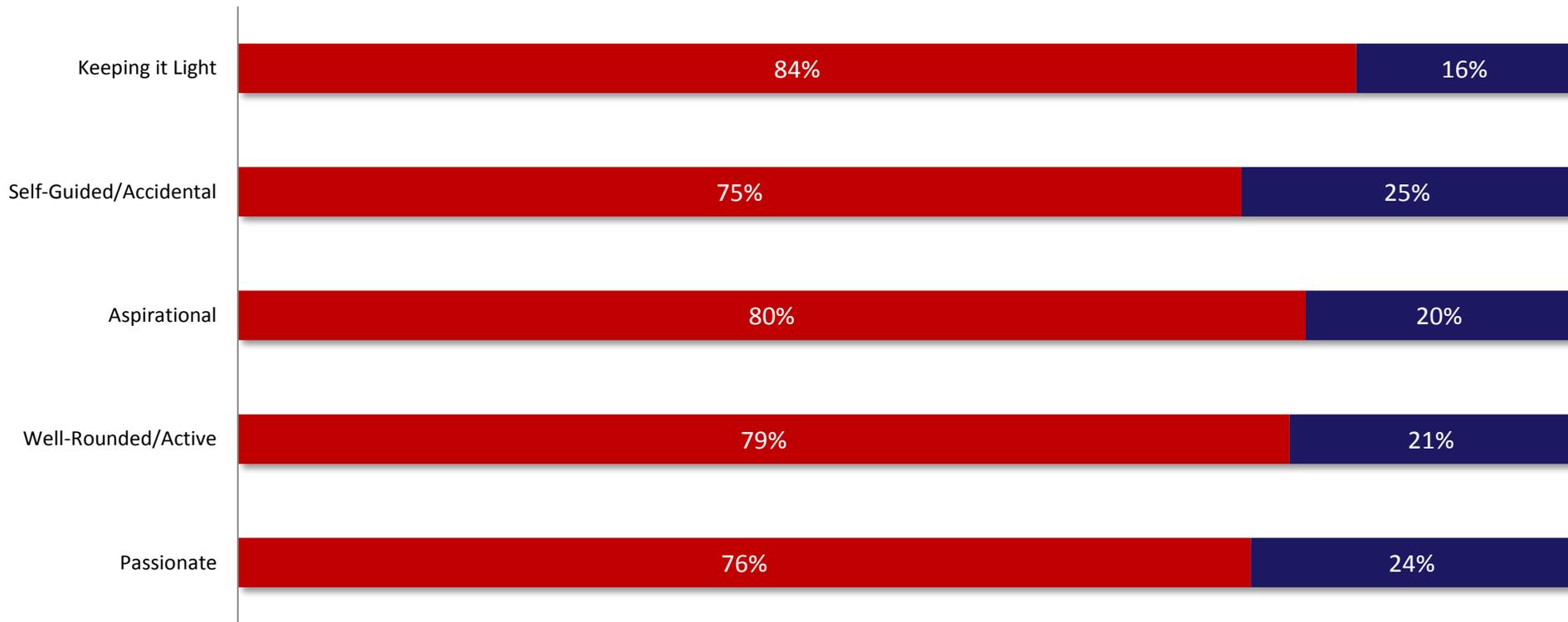


[Q16 – HISTORIC HOTELS] You indicated that you stayed in a hotel, motel or resort. Was the building you stayed in a historical property?

# The Majority of Travelers Tend to Prefer Hotel Chains Over the Type of Independent Establishments That Primarily Exist in Oregon

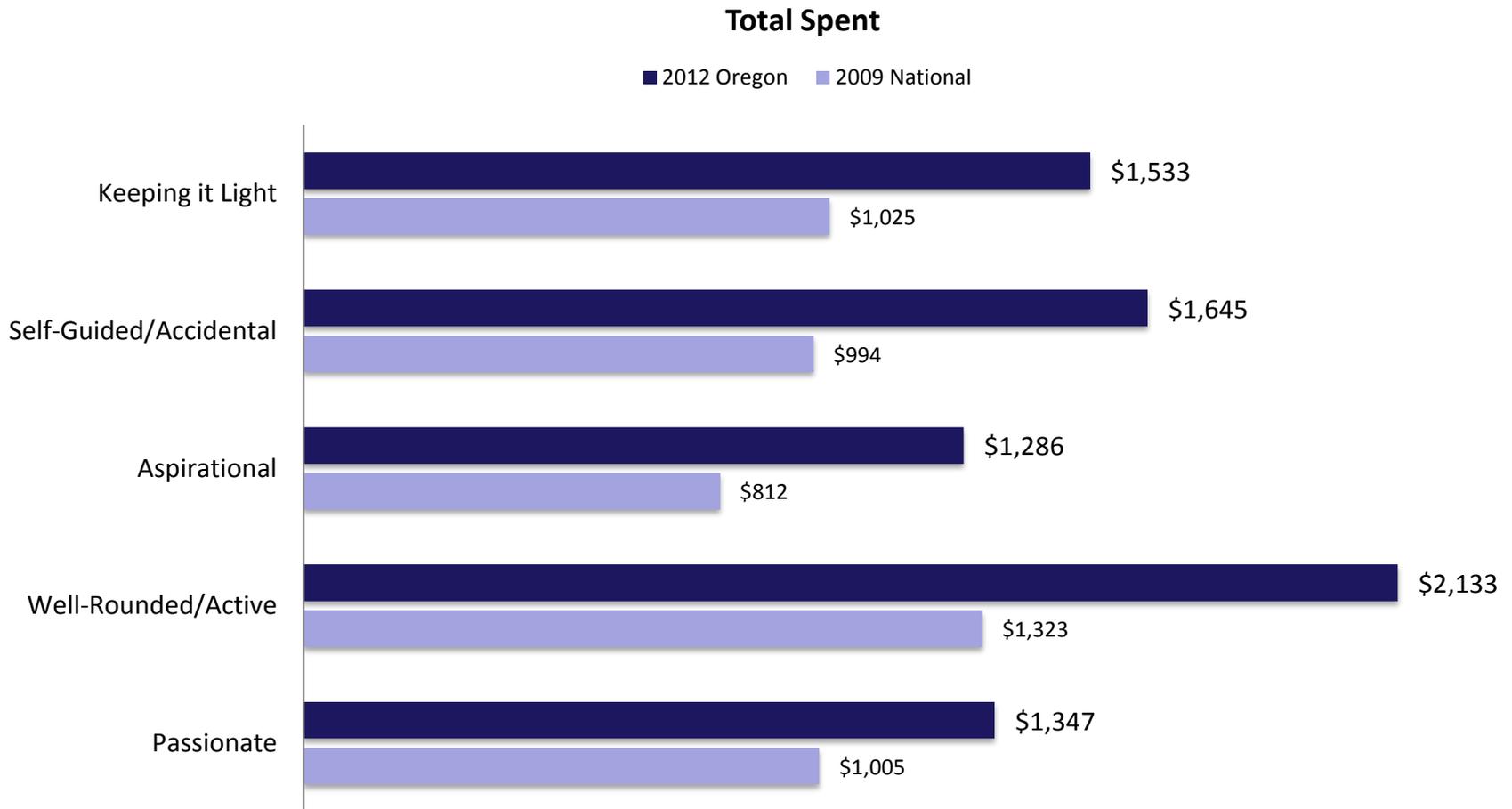
## Type of Hotel

■ Hotel chains ■ Independent properties



# Spending

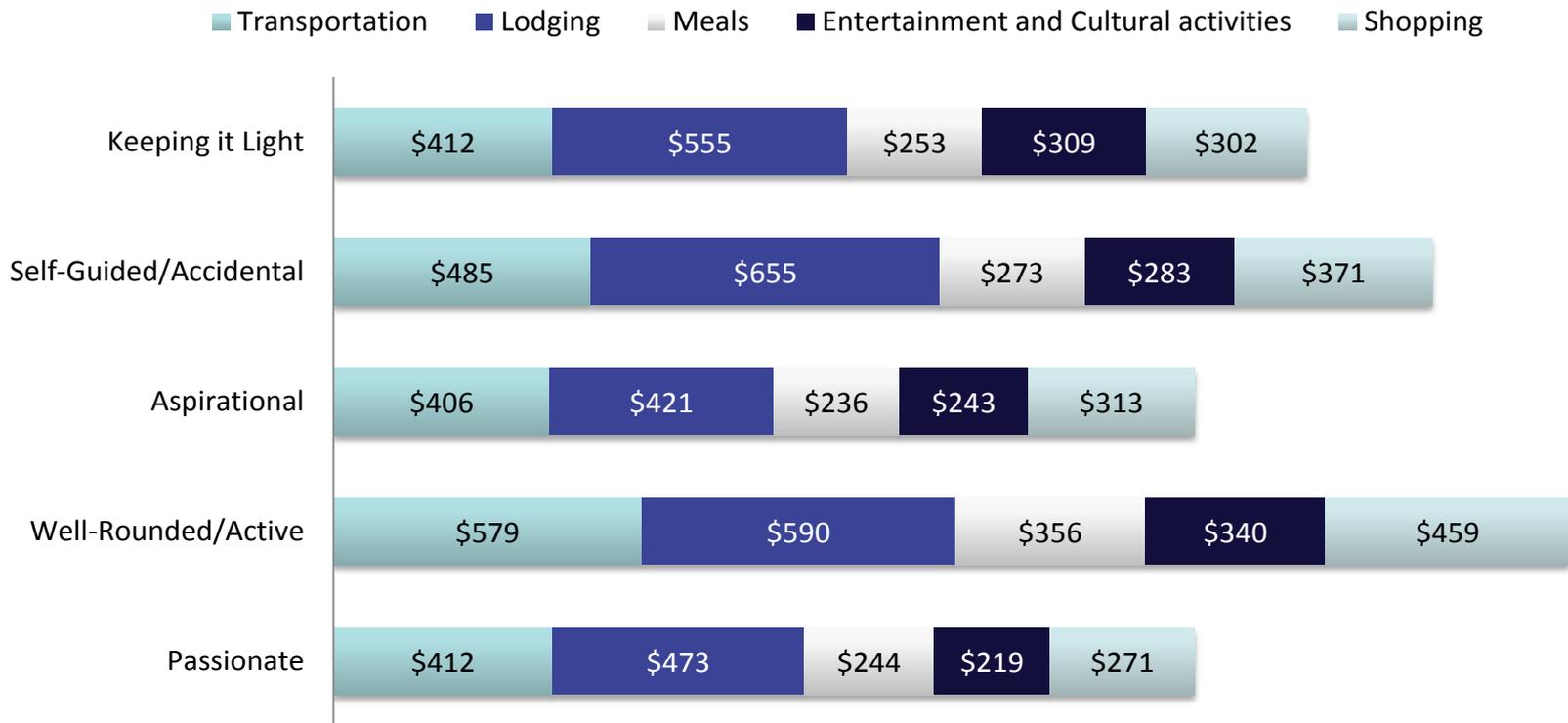
# Well-Rounded, Active Travelers Spend 70% More on Their Trip



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. N=1663

# In Every Category of Spending, Well-Rounded Active Travelers Spend the Most Followed by Self-Guided/Accidental

## CH Segment Spending



Q21B. 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.

# Economic Impact

# The Economic Impact of Well Rounded and Passionate Accounts for Over Three-Fifths of the Total Economic Impact of CH Travelers

	Total CH Travelers	Non-CH Travelers	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded Active	Passionate
Sample Size	1663	338	299	245	327	446	345
Average Total Spend per Overnight Trip	\$1,618	\$1,095	\$1,533	\$1,645	\$1,286	\$2,133	\$1,347
Median # Trips	3	3	3	3	3	4	4
Estimated Pop*	47,481,007	9,650,379	8,536,874	6,995,097	9,336,313	12,733,932	9,850,238
Median HH Size	2	2	2	2	2	3	2
Estimated Economic Impact	\$115.2Bil	\$15.8Bil	\$19.6Bil	\$17.3Bil	\$18.0Bil	\$36.2Bil	\$26.5Bil

According to US Travel Association, 71% of the US population took a leisure trip. We have used this percentage to calculate the economic impact of the Oregon and feeder market samples (including Canadian Provinces surveyed) taking 71% of the populations of each state or province as the estimated leisure traveler population, then multiplied that by the percentage of CH travelers within that group.

Q21. 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.

Note: Formula (Average Total Spend \* Median Leisure Trips \* Estimated Population) / Median Household Size = Estimated Economic Impact (in Billions); Total Spend, Leisure Trips and Population Estimates Rounded. \*71% of US population take leisure trips - Source US Travel: Travel Horizons 2012



# Online Sources and Social Media

# Only Expedia Ranks in the Top Ten for Travel Sites

Internet Sites Visited	Keeping it Light	Self-Guided/Accidental	Aspirational	Well-Rounded/Active	Passionate
Sample Size	299	244	327	446	345
Facebook.com	73%	62%	64%	70%	70%
Google.com	75%	61%	61%	66%	69%
Amazon.com	57%	51%	50%	49%	63%
Youtube.com	61%	48%	39%	58%	60%
Yahoo.com	46%	41%	42%	51%	49%
Ebay.com	37%	34%	30%	38%	43%
Mapquest.com	36%	35%	22%	28%	34%
MSN.com	34%	22%	24%	29%	31%
Expedia.com	25%	20%	21%	30%	28%
Google +	22%	19%	20%	37%	25%
Travelocity.com	24%	16%	16%	29%	28%
Twitter.com	17%	14%	13%	30%	18%
ESPN.com	26%	13%	10%	24%	19%
Bing.com	16%	15%	12%	22%	20%
TripAdvisor.com	16%	14%	13%	25%	23%
CNN.com	20%	14%	10%	25%	20%
Pinterest.com	18%	12%	13%	20%	18%
Orbitz.com	14%	12%	12%	23%	20%
Priceline.com	11%	10%	12%	19%	17%
Hotwire.com	9%	11%	10%	20%	16%
Huffingtonpost.com	14%	8%	11%	16%	15%
Linkedin.com	14%	11%	11%	14%	15%
Kayak.com	13%	7%	8%	16%	13%
National Geographic	9%	8%	6%	15%	13%
Yelp.com	10%	8%	8%	12%	10%
Blogspot.com	9%	8%	6%	12%	7%
Other please specify	3%	8%	4%	2%	4%

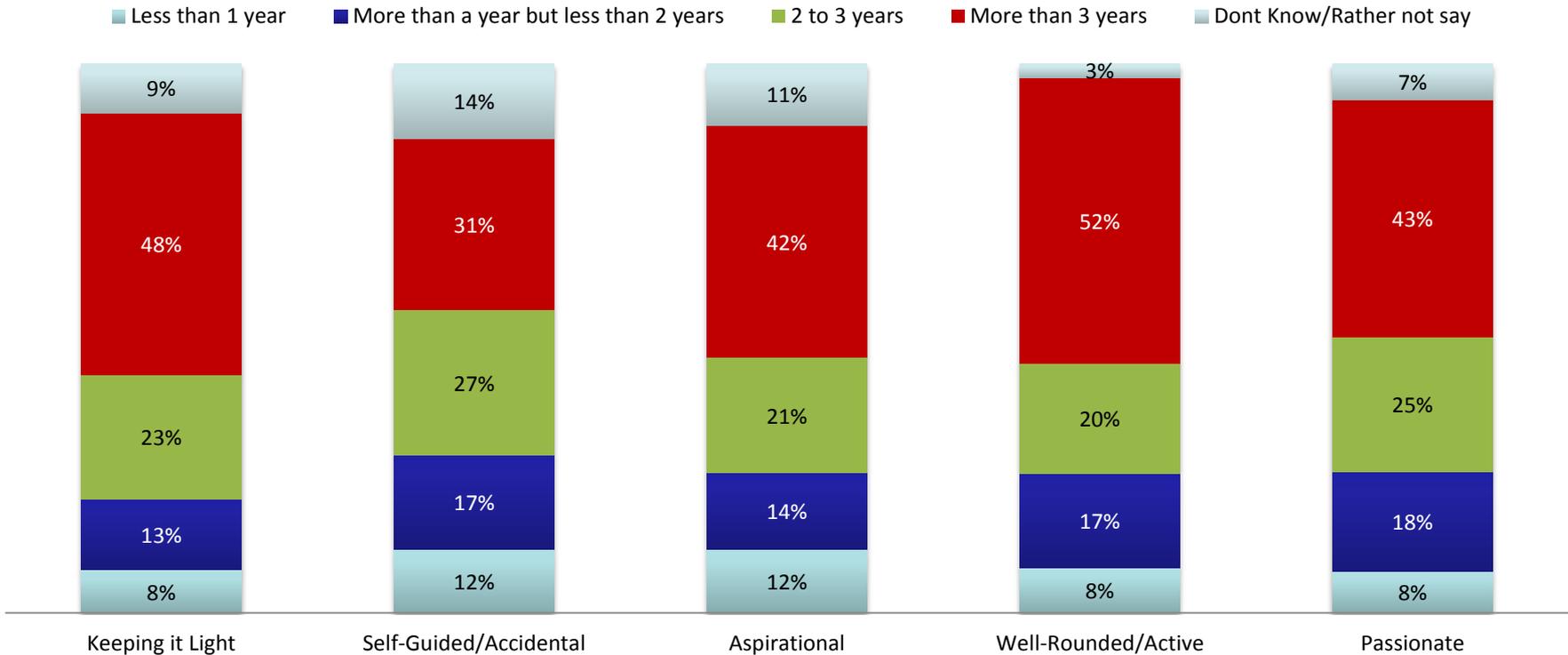
Well rounded, passionate and keeping it light travelers are more likely to use Facebook and Youtube

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

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

# Well-Rounded/Active Participants Are Technology Proficient and Have Been Using Social Media Sites the Longest

## Use of Social Networking Sites



# Targeted Marketing in the Right Travel Magazines is Likely to Reach Nearly One-Third of Travelers

The Well-Rounded/Actives read all types of publications more than other segments and are twice as likely to read cultural related magazines.

Oregon 2012 findings consistent with 2009 National.

	Keeping it Light	Self-Guided/Accidental	Aspirational	Well-Rounded/Active	Passionate
Sample Size	299	244	327	446	345
Community newspaper	47%	44%	38%	43%	55%
Entertainment magazines	41%	23%	31%	49%	36%
News magazines	39%	28%	30%	46%	39%
Travel related magazines	33%	26%	31%	49%	39%
Hobby related magazines	35%	28%	24%	35%	35%
General interest, city life or regional magazines	36%	26%	25%	38%	32%
Food/Wine related magazines	33%	18%	21%	39%	34%
Fashion/homemaking magazines	28%	19%	24%	34%	33%
National newspaper	28%	23%	23%	34%	34%
Sports related magazines	32%	20%	18%	36%	23%
History related magazines	16%	16%	18%	30%	29%
Financial magazines	21%	10%	15%	24%	13%
Cultural related magazines	14%	6%	10%	29%	21%
Other please specify	9%	15%	7%	3%	9%

# Specifically, the Most Bang for the Advertising Buck May be Travel + Leisure and AAA Magazines

Preferred Means of Reaching the Well-Rounded/Active Travelers Include National Geographic and Travel + Leisure.

	Keeping it Light	Self-Guided/Accidental	Aspirational	Well-Rounded/Active	Passionate
Sample Size	98	63	100	219	133
National Geographic	52%	35%	41%	53%	53%
Travel + Leisure	46%	26%	41%	58%	42%
AAA Magazines	43%	42%	33%	41%	40%
National Geographical Traveler	24%	17%	28%	41%	30%
Sunset	27%	13%	12%	37%	38%
Vacations	20%	16%	27%	38%	16%
Coastal Living	22%	28%	12%	30%	22%
Oregon Coast Magazine (OR only)	16%	27%	13%	27%	22%
Condé Nast Traveler	16%	12%	11%	23%	11%
Northwest Travel Magazine (OR only)	20%	6%	9%	20%	21%
Outside	16%	3%	5%	23%	11%
Travel 50 & Beyond	9%	6%	11%	20%	9%
Portland Monthly Magazine (OR only)	2%	7%	3%	19%	7%
None of the above	3%	12%	8%	2%	3%

Much higher readership of travel and leisure magazines for Oregon travelers vs. 2009 National sample.

# Given Oregon's Superior Reputation for Excellent Food and Wine, the Two Most Promising Publications for Advertising are *Food & Wine* and *Bon Appetit*

	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded Active	Passionate
Sample Size	98	43	69	175	117
Food & Wine	44%	35%	28%	62%	41%
Bon Appétit	41%	40%	49%	52%	43%
Better Homes and Gardens	46%	32%	29%	50%	50%
Food Network Magazine	38%	26%	30%	45%	44%
Cooking Light	32%	20%	24%	41%	32%
Gourmet	25%	23%	29%	42%	29%
Family Circle	29%	15%	11%	38%	38%
Cooks Illustrated	21%	13%	17%	34%	27%
Wine Spectator	18%	7%	15%	31%	12%
Sunset Pacific NW edition	12%	28%	8%	28%	12%
Vegetarian Times	12%	11%	9%	22%	7%
The Wine Advocate	6%	11%	7%	27%	4%
Saveur	6%	12%	4%	20%	10%
All About Beer	5%	16%	6%	20%	7%
Northwest Palate	5%	1%	7%	21%	5%
Midwest Living	5%	3%	6%	21%	4%
Intermezzo Magazine	%	3%	3%	13%	2%
None of the above	4%	4%	9%	4%	4%
Other please specify	5%	8%	8%	1%	10%

No notable difference between Oregon 2012 and National 2009.

# Smithsonian, American History and History Channel Magazines Top the List of Most Read Historical Publications

In addition to these 3 publications, Well-Rounded/Active travelers also read Natural History magazine.

	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded Active	Passionate
Sample Size	49	40	58	133	101
Smithsonian	50%	47%	47%	58%	53%
American History	46%	41%	26%	59%	43%
History Channel Magazine	44%	30%	31%	55%	43%
Natural History	24%	33%	39%	50%	39%
Military History	29%	38%	24%	41%	28%
World War II	26%	36%	17%	45%	23%
Civil War Times	23%	26%	18%	36%	15%
Good Old Days	11%	15%	12%	33%	12%
Reminisce	17%	10%	11%	26%	14%
Preservation Magazine	10%	4%	12%	29%	11%
Realm	3%	3%	11%	25%	3%
Armchair General	6%	0%	8%	19%	6%
None of the above	16%	29%	13%	7%	15%
Other please specify	6%	4%	5%	2%	6%

Natural History and American History have far higher readership for Oregon 2012 travelers than 2009 National travelers.

# National Geographic Tops the List of Most Read Cultural Publication

Oregon Coast Magazine is read by one-quarter of the respondents and nearly 4 out of 10 Well-Rounded/Actives.

	Keeping it Light	Self-Guided/Accidental	Aspirational	Well-Rounded/Active	Passionate
Sample Size	42	15	33	130	73
National Geographic	85%	72%	70%	71%	78%
Rolling Stone	46%	34%	50%	56%	28%
Smithsonian	28%	45%	43%	51%	42%
History Channel Magazine	40%	37%	29%	45%	41%
The New Yorker	41%	34%	37%	48%	32%
Sunset Magazine (Pacific Northwest Edition)	39%	20%	28%	38%	47%
Gourmet Magazine	33%	24%	26%	42%	35%
Southern Living	22%	17%	27%	38%	26%
Oregon Coast Magazine	19%	15%	21%	37%	18%
Art in America	22%	15%	25%	35%	13%
Billboard	26%	19%	16%	33%	10%
None of the above	9%	3%	5%	6%	5%
Other please specify	9%	6%	2%	1%	4%

Oregon 2012 travelers far more likely to read National Geographic and Rolling Stone than 2009 National travelers.

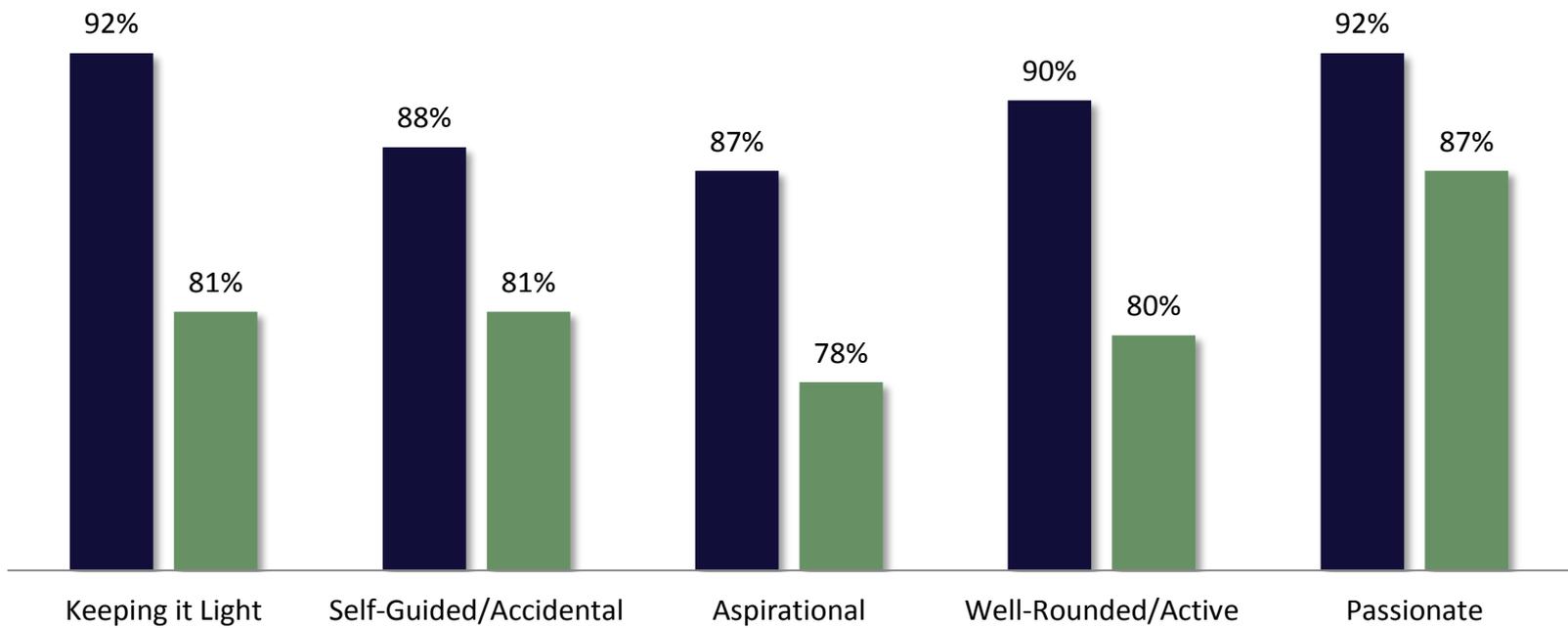
[Q32D – CULTURAL MAGAZINES] Which of the following types of **cultural** publications do you typically read, either in print or online? Please select all that apply.

# Future Travel

# All Oregon Segments Are Very or Somewhat Likely to Take Leisure Trip within Next 12 Months More So Than Their National Counterparts

## Likelihood to Take a Leisure Trip

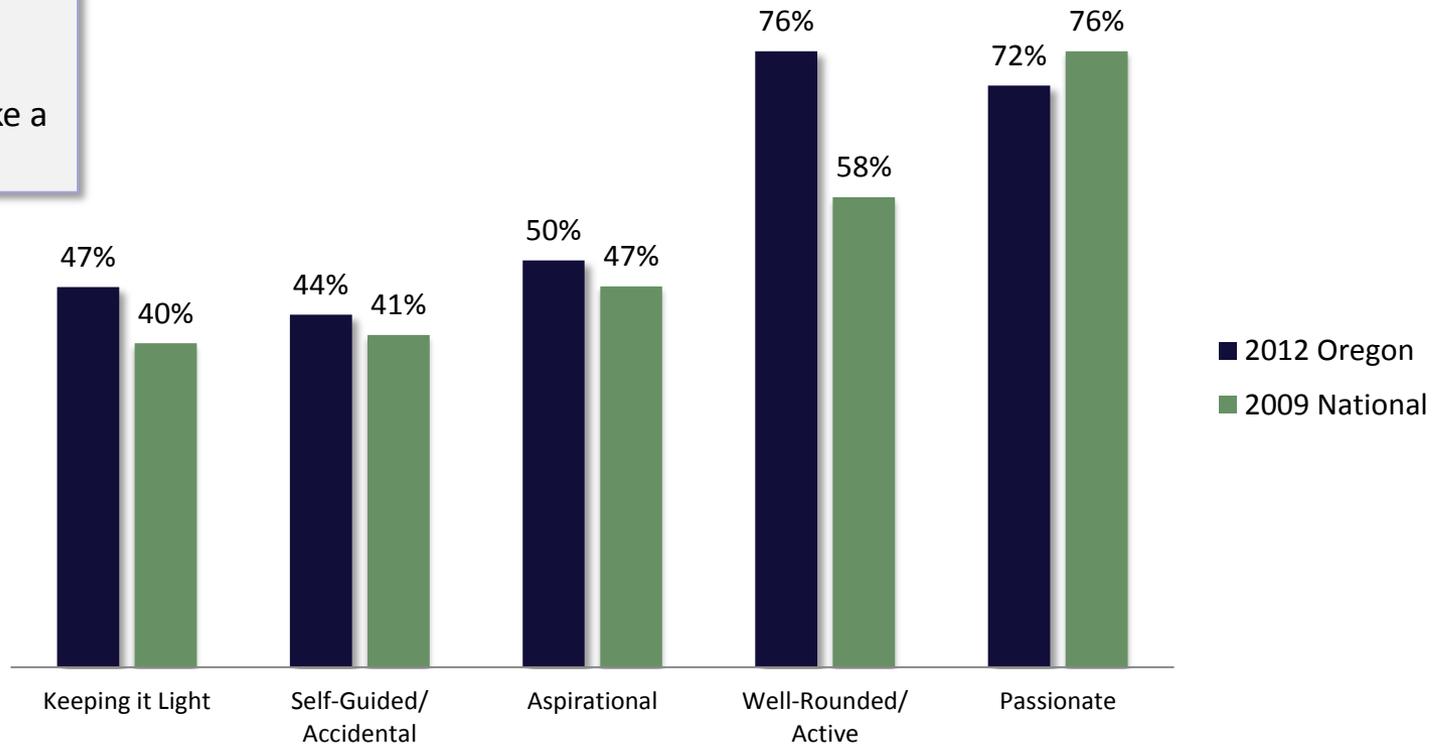
■ Oregon 2012 ■ National 2009



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

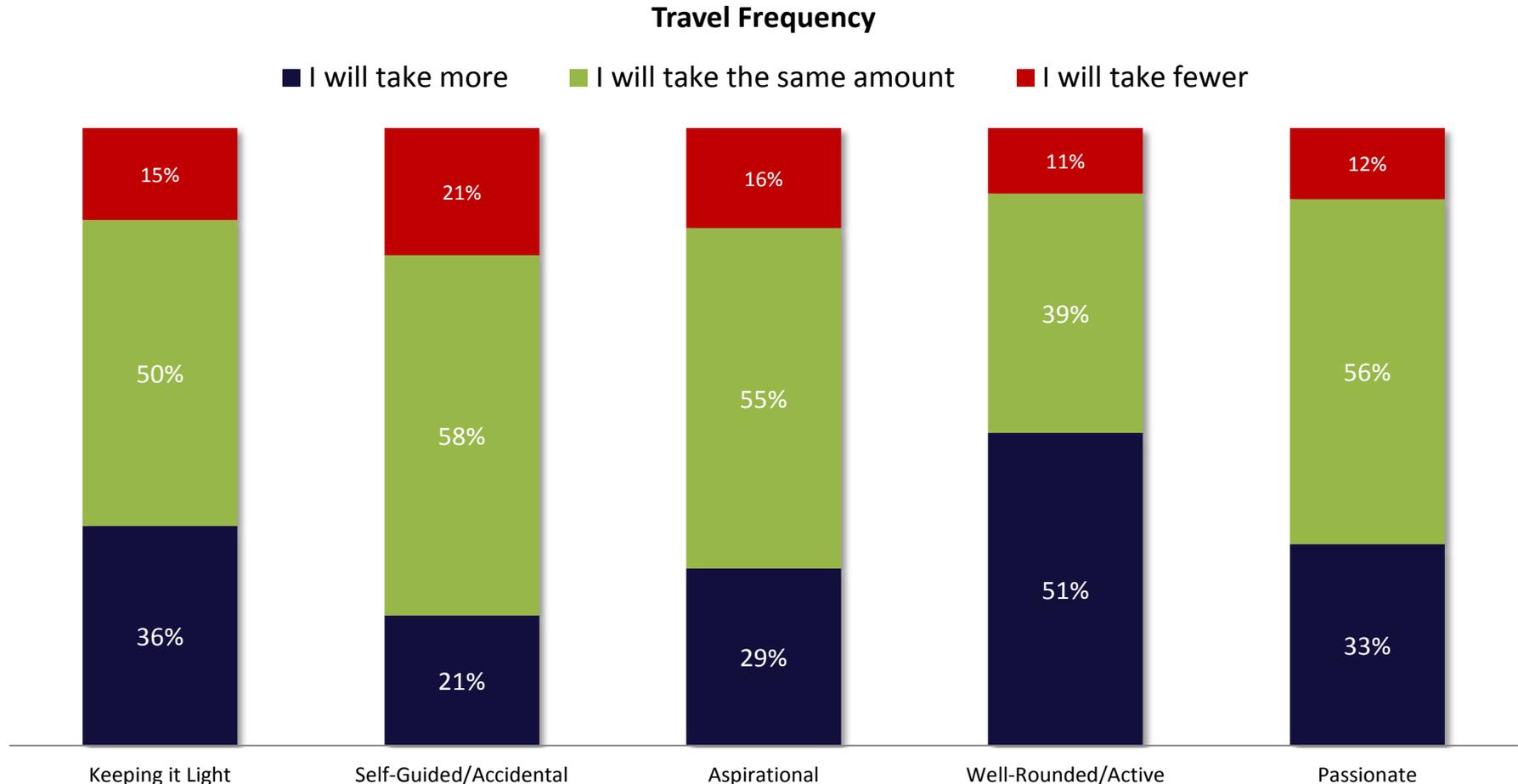
Only well-rounded travelers dramatically increased their likelihood to take a CH trip.

**% Very/Somewhat Likely to Take CH Trip Next 12 Months**



# An Opportunity Exists to Target the Well-Rounded/Active Travelers Who Are More Likely to Report They Will Take *More* Leisure Trips in the Next 12 Months

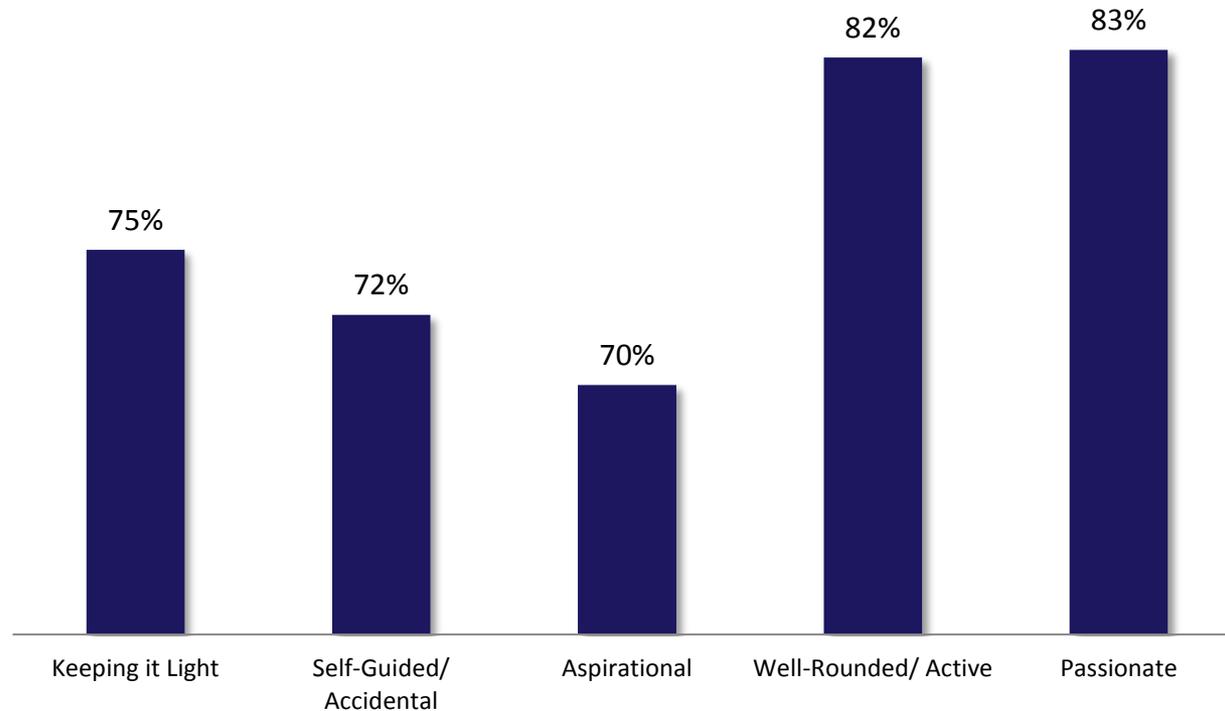
Far more CH travelers in 2012 say they will take more trips than when asked in the 2009 National sample. Nationally, only 23% of Keeping it Light travelers said they would take more trips, 14% of Self-Guided/Accidental, 23% Aspirational, 38% for Well-Rounded/Actives and 24% for Passionates.



# Good News: 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 To Oregon

**% Who Would Consider Taking A Trip To OR Next 12 Months**



# Great Opportunity to Educate Passionates and Keeping it Light Segment on the Varied Activities in Oregon

	Keeping it Light	Self-Guided Accidental	Aspirational	Well-Rounded Active	Passionate
Sample Size	76	68	100	79	60
I'd rather visit another State	28%	25%	24%	24%	14%
No friends/family to visit	14%	20%	19%	18%	11%
Considering a different destination	15%	13%	16%	16%	20%
I don't know what there is to do or see there	13%	10%	10%	8%	15%
It is too far to travel to	9%	5%	8%	10%	10%
Its too expensive	8%	4%	9%	7%	9%
Don't like the weather	4%	4%	1%	7%	5%
Not easily accessible	1%	3%	4%	5%	2%
Other please specify	8%	15%	10%	4%	15%

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

Q43b. IF NO, what's the primary reason you would not consider taking a trip to Oregon?

# Cultural and Heritage Travelers Study Geographic Results

# Demographics

## Definition of Geographic Tiers

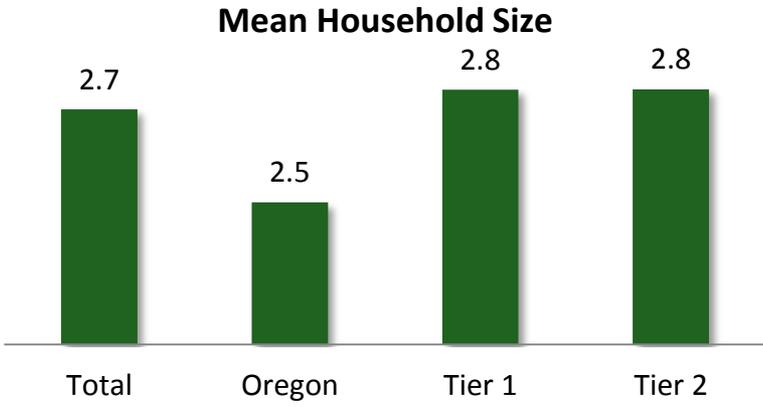
Tier 1 Markets include Idaho, Alberta, Utah, Northern California, Vancouver, BC, Washington n=1350

Tier 2 Markets include Southern California and New York n=300

Residents of Oregon n=350

# Key Market Demographics

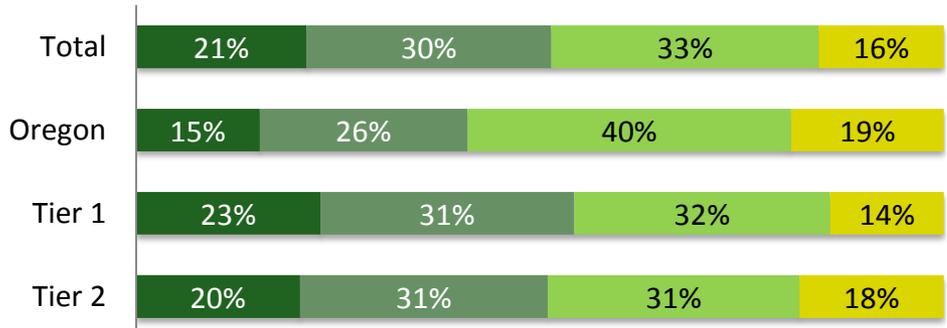
	Total	Oregon	Tier 1	Tier 2
Sample Size	2000	350	1350	300
<b>Gender</b>				
Male	49%	47%	48%	60%
Female	51%	53%	53%	41%
<b>Race</b>				
White/Caucasian	83%	92%	82%	79%
Black/African-American	3%	1%	3%	5%
Asian/Pacific islander	10%	4%	11%	12%
Native American	3%	3%	3%	2%
Other	3%	2%	3%	5%



Q62. Please indicate your household size or the number of people there are in your household.

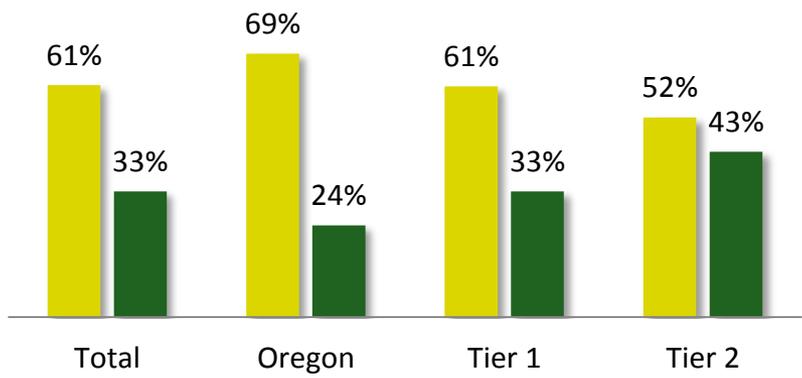
### Age

- Gen Y (under 29)
- Gen X (29-44)
- Boomers (45-64)
- Matures (over 64)



### Household Income

- Under \$75K
- Over \$75K



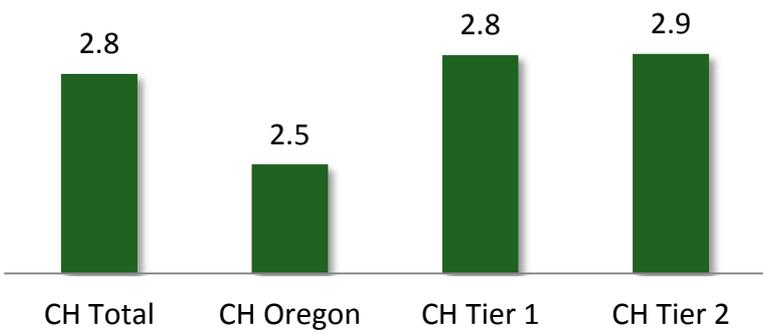
Q65. What was your TOTAL household income in 2011 before taxes?

Q57b. What is your gender? Q59. Are you white, black, Asian, Native American or something else? Q58. What is your age?

# Key Market Demographics

	CH Total	CH Oregon	CH Tier 1	CH Tier 2
Sample Size	1662	292	1116	254
<b>Gender</b>				
Male	49%	46%	47%	59%
Female	51%	54%	53%	41%
<b>Race</b>				
White/Caucasian	82%	91%	81%	76%
Black/African-American	3%	1%	3%	5%
Asian/Pacific islander	11%	5%	12%	13%
Native American	3%	3%	3%	2%
Other	4%	2%	3%	6%

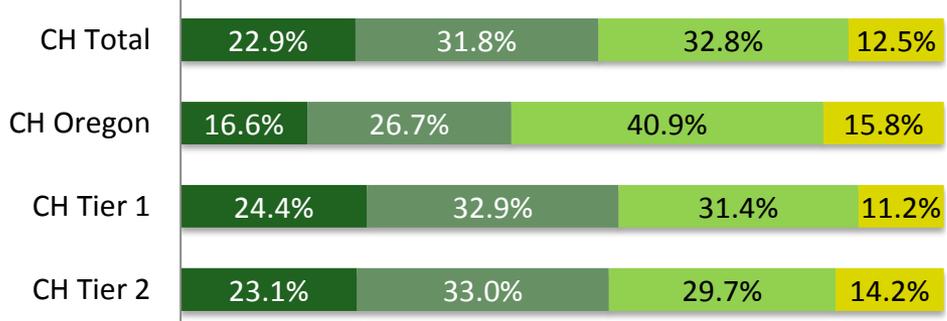
## Mean Household Size



Q62. Please indicate your household size or the number of people there are in your household.

## Age

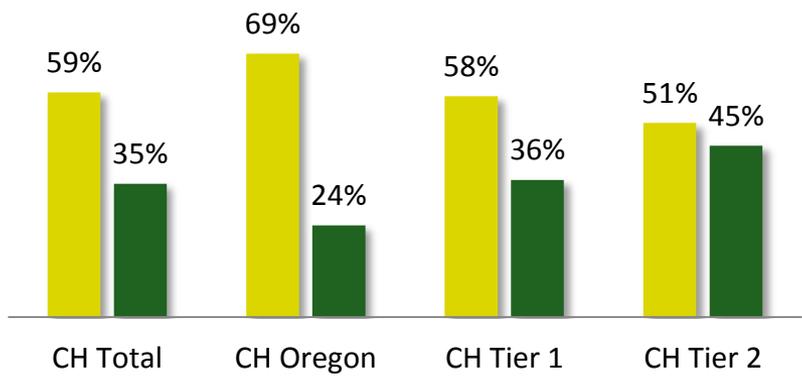
- Gen Y (under 29)
- Gen X (29-44)
- Boomers (45-64)
- Matures (over 64)



Q57b. What is your gender? Q59. Are you white, black, Asian, Native American or something else? Q58. What is your age?

## Household Income

- Under \$75K
- Over \$75K

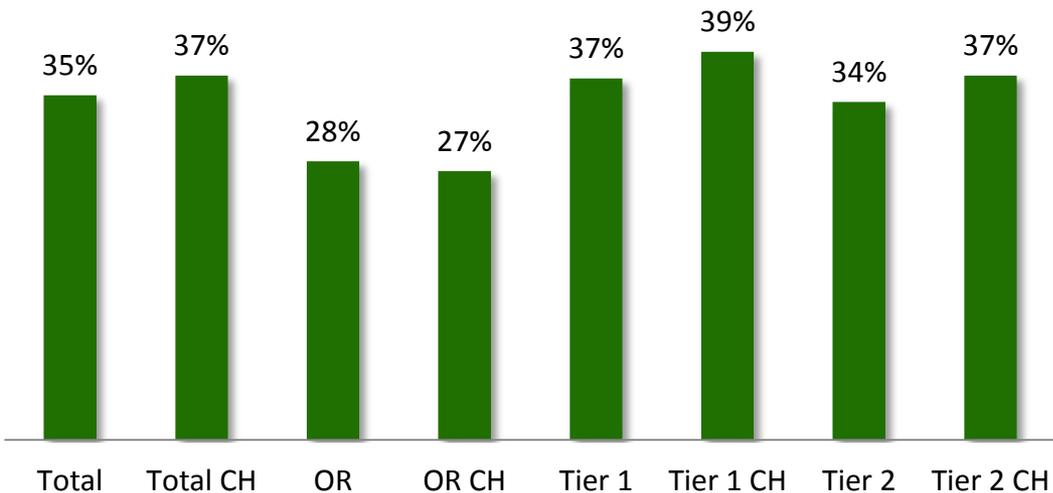


Q65. What was your TOTAL household income in 2011 before taxes?

# Key Market Demographics

Education	Total	Total CH	Total OR	Oregon CH	Total Tier 1	Tier1 CH	Total Tier 2	Tier 2 CH
Less than 9th grade	1%	0%	0%	0%	1%	1%	0%	0%
9th to 12th grade no diploma	2%	2%	3%	2%	2%	2%	1%	1%
High School Graduate or GED	16%	14%	17%	15%	16%	14%	15%	13%
Some college no degree	30%	<b>31%</b>	32%	34%	30%	32%	27%	27%
Associates Degree	13%	13%	15%	15%	13%	13%	12%	12%
Bachelors Degree	26%	27%	26%	25%	25%	26%	30%	32%
Graduate or Professional Degree	12%	13%	8%	9%	13%	13%	15%	15%

## Children Under 18



D66. What is the highest level of education that you personally have completed?  
 D63 Do you have any children 18 years of age or younger living in your household?

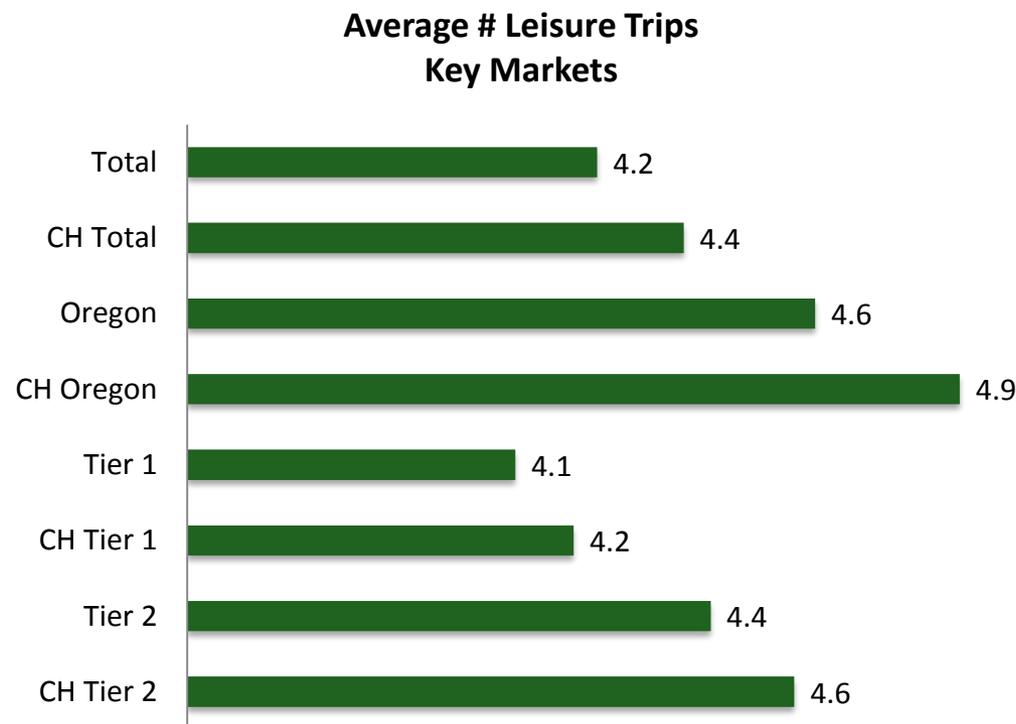
# Key Market Demographics

Marital Status	Total	Total CH	Total OR	OR CH	Total Tier 1	Tier 1 CH	Total Tier 2	Tier 2 CH
Single never married	22%	22%	23%	25%	20%	20%	25%	26%
Living with significant other	10%	11%	9%	9%	11%	12%	10%	11%
Married	53%	52%	52%	51%	53%	52%	51%	50%
Divorced/Separated	11%	11%	11%	12%	12%	11%	9%	8%
Widowed	4%	3%	5%	4%	3%	3%	4%	5%

Employment	Total	Total CH	Total OR	OR CH	Total Tier 1	Tier 1 CH	Total Tier 2	Tier 2 CH
Employed Fulltime	42%	45%	35%	34%	43%	46%	48%	52%
Employed Part-time	13%	13%	15%	15%	12%	13%	13%	14%
Fulltime homemaker	9%	9%	10%	11%	9%	9%	7%	6%
Fulltime student	4%	5%	5%	5%	5%	5%	3%	4%
Self-employed	7%	6%	6%	6%	7%	7%	4%	5%
Retired	17%	15%	22%	21%	16%	14%	19%	15%
Unemployed	5%	5%	5%	6%	5%	5%	5%	4%

D61: Which of the following best describes your marital status  
 D67. What is your current employment status?

# Oregonians and Those From Utah (average of 4.7 trips) Take More Leisure Trips Than Those From Other States/Provinces

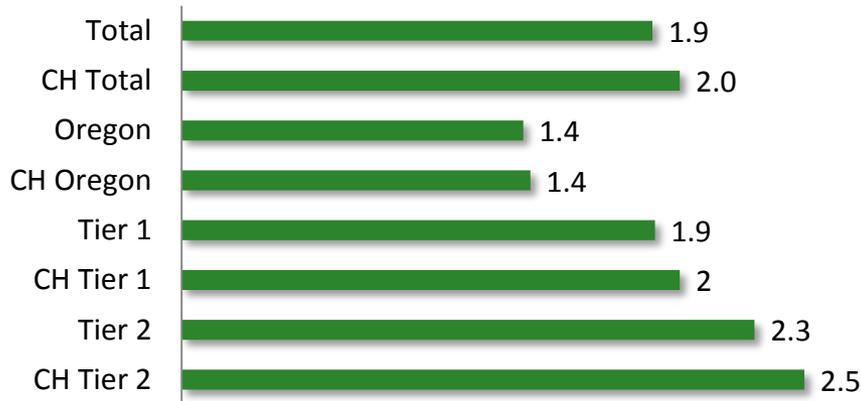


S1. Thinking of all the trips you have taken away from home of at least 50 miles one-way **OR** where you spent at least one overnight in the past 12 months, approximately how many of these trips were for each of the purposes listed below? Leisure (pleasure, vacation, or personal purposes) within the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

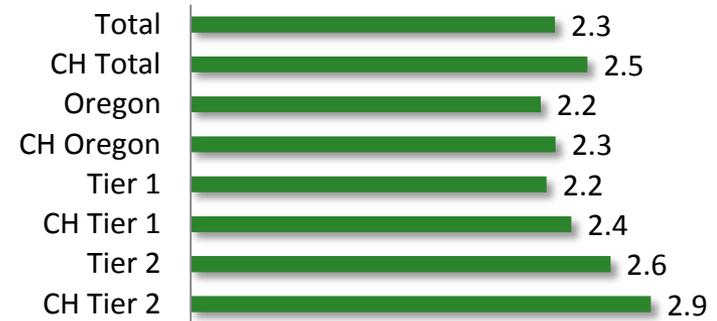


# Those From Tier 2 Most Often Combine Business and Leisure Trips and Take International Trips

**International Trips  
Key Markets**



**Combined Leisure and Business Trips  
Key Markets**



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?

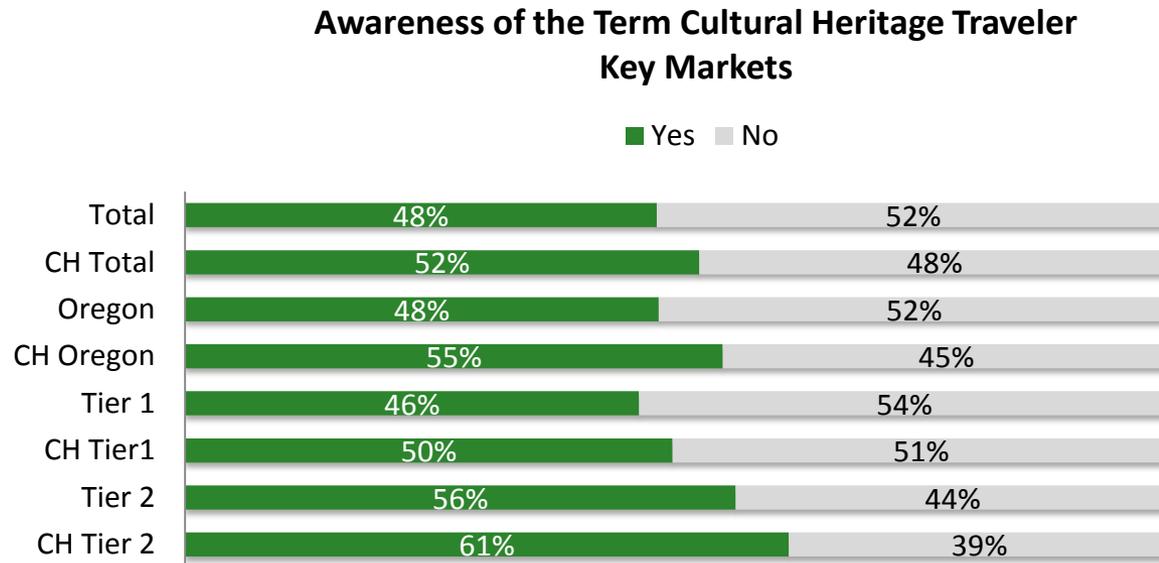
# The Economic Impact from Cultural and Heritage Travelers to Oregon is Approximately \$20B



- 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 adjusted to 2012 dollars), by almost 60%!
- ② 17% of these travelers visited Oregon on their most recent trip contributing \$19.6 billion to the state economy. Half of the 17% of travelers to Oregon were from Oregon.
- ③ Oregon's target markets include Canada, combined with the US feeder markets, this 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.

# Cultural And Heritage Awareness

# CH Travelers From Oregon, New York and Southern California Are Most Likely to be Aware of the Term Cultural and Heritage Traveler

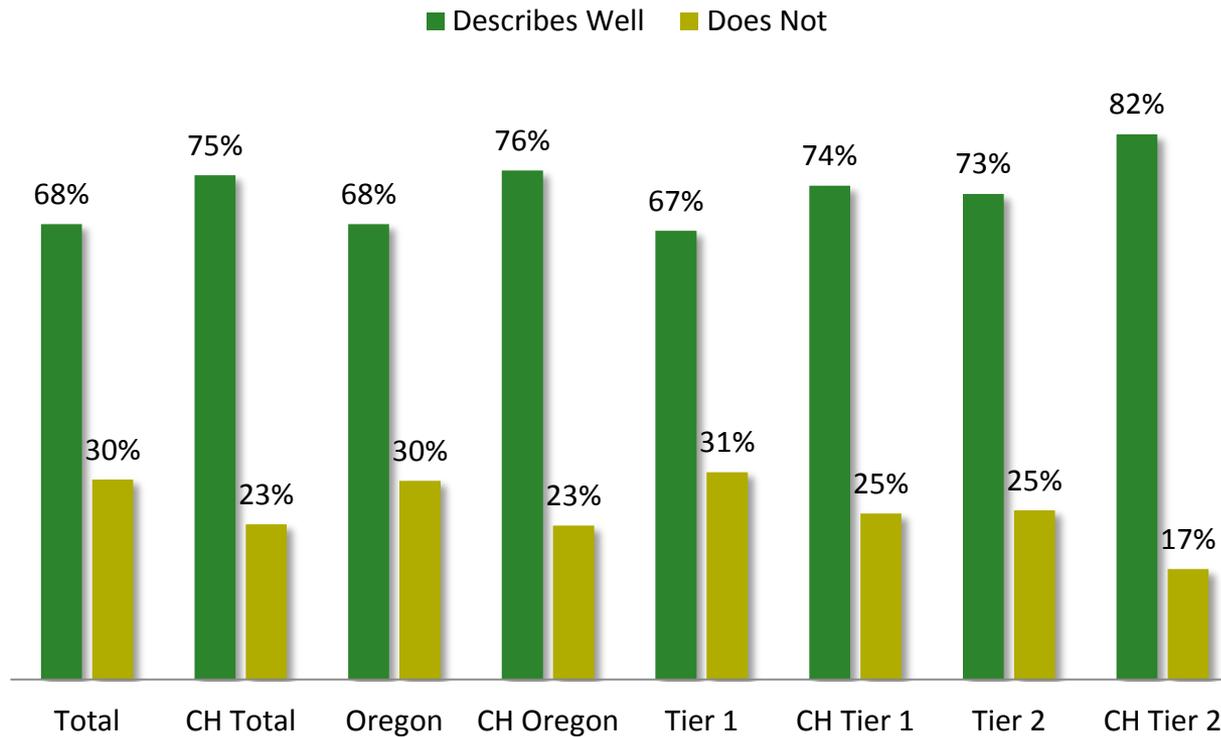


Q6. The term “cultural and/or heritage traveler” is sometimes used to describe certain types of Leisure travelers. Have you ever heard of this term?



# Travelers from Oregon, New York and Southern California Define Themselves as CH Travelers More So Than Those from Other Regions

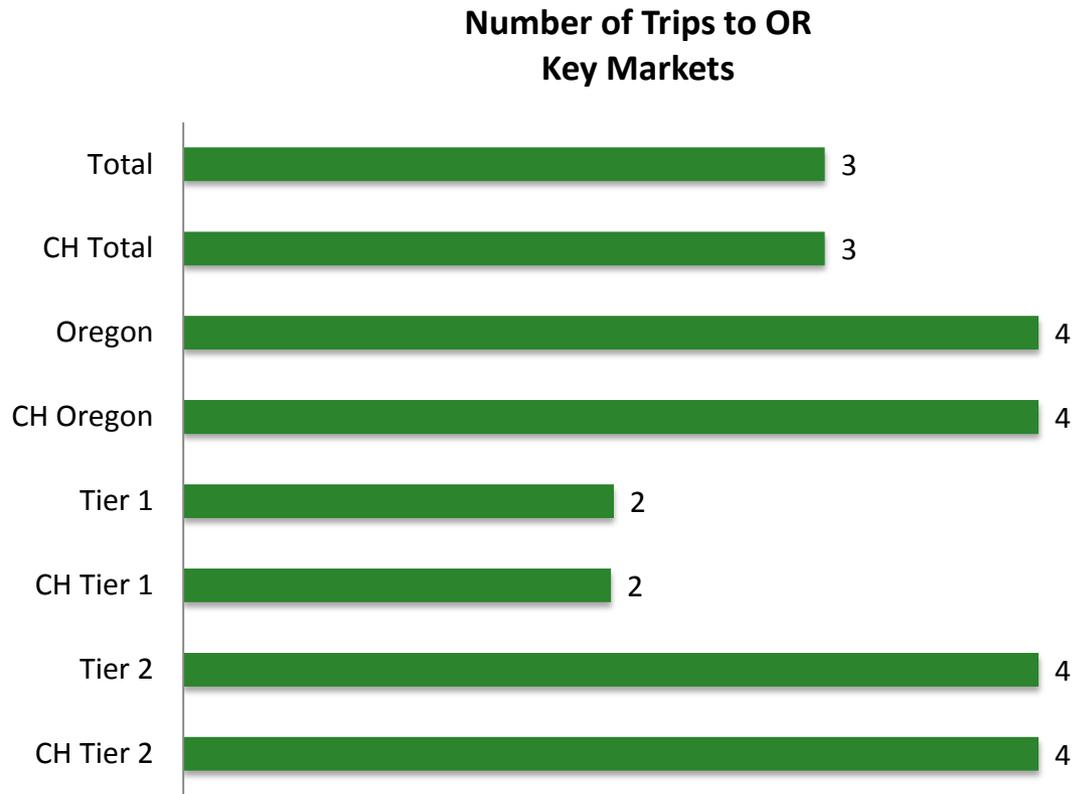
## Defining Themselves as CH Travelers



[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?



# Nearly One-Half of Those Who Live in Oregon Take Leisure Trips Within Oregon; Don't Ignore the Market on the Doorstep



Those who reside in Tier 1 visited Oregon an average of twice in the last 12 months

# There is a Very Broad Range of What These Travelers Consider Cultural and Heritage Activities

Top 20 Activities Considered CH	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Sample Size	2000	1662	350	292	1350	1116	300	254
Visited heritage buildings/historical buildings	47%	49%	53%	55%	46%	48%	47%	49%
Visited Native American sites	46%	48%	47%	47%	46%	49%	40%	41%
Attended cultural and/or heritage fair or festival	45%	47%	50%	51%	45%	48%	39%	40%
Attended historical re-enactments	45%	47%	48%	49%	45%	48%	39%	40%
Visited historic sites	44%	46%	47%	49%	44%	46%	40%	42%
Participated in an organized tour of local history or culture	44%	46%	46%	47%	45%	47%	37%	38%
Visited living history museums	42%	44%	47%	47%	42%	45%	35%	35%
Visited history museums/centers	41%	43%	46%	47%	41%	43%	37%	38%
Visited natural history museums/centers	41%	43%	45%	46%	41%	43%	36%	37%
Visited art museums/galleries	40%	42%	44%	46%	40%	42%	38%	40%
Took a tour focusing on local architecture	37%	39%	38%	39%	38%	40%	35%	36%
Researched family history	37%	39%	37%	40%	37%	39%	34%	36%
Attended an art/craft fair or festival	32%	33%	37%	37%	31%	33%	30%	31%
Shopped for items made by local artisans and craftspeople	31%	33%	31%	32%	31%	33%	30%	31%
Visited science museums/centers	31%	32%	32%	32%	31%	33%	28%	28%
Visited children's museums	29%	30%	28%	27%	30%	31%	28%	28%
Visited farms and ranches	27%	28%	24%	25%	28%	29%	26%	27%
Explored small towns	26%	27%	28%	28%	25%	26%	27%	27%
Attended the theatre/play/opera (live performance)	24%	26%	27%	28%	24%	26%	23%	23%
Attended a professional dance performance (ballet & other forms)	24%	26%	26%	26%	24%	26%	22%	23%

CH Oregonians are slightly more likely to consider activities as Culture/Heritage activities.

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.

# Awareness and Knowledge of Oregon

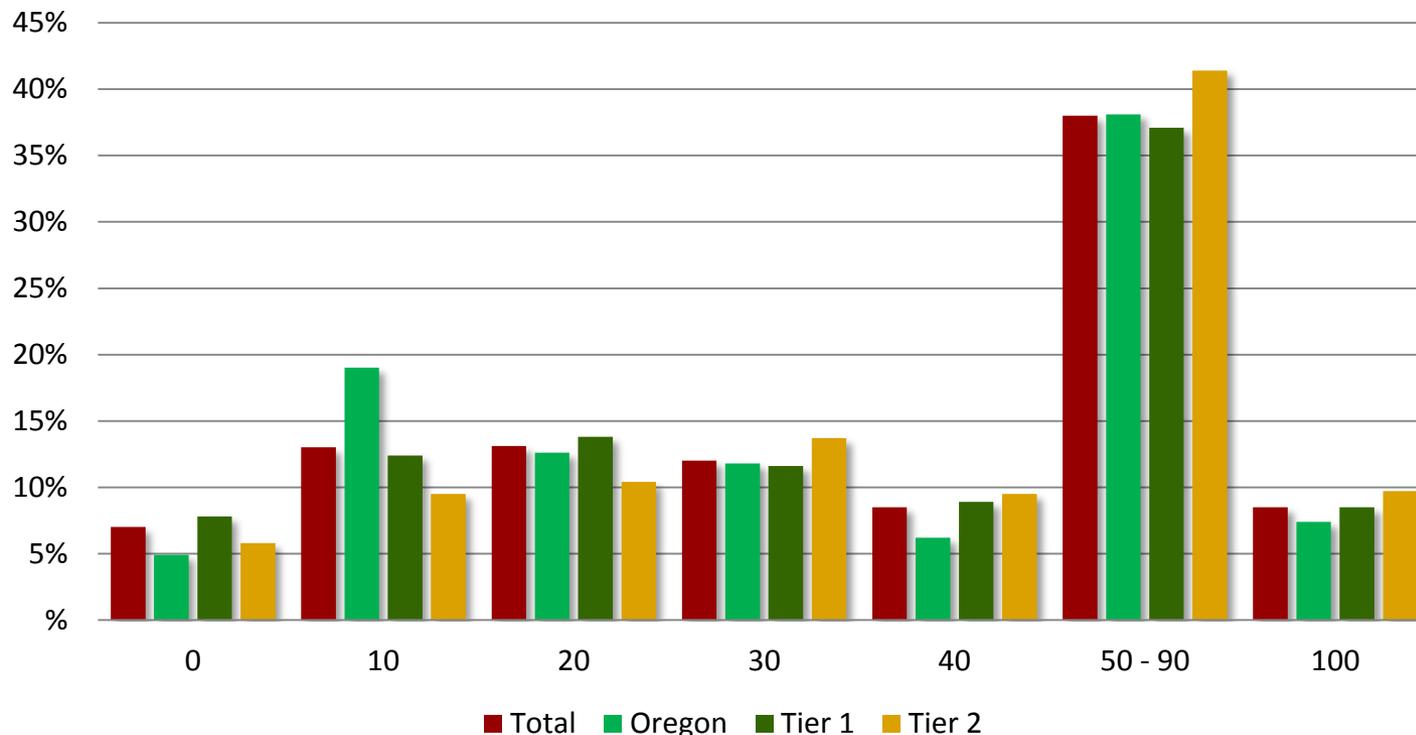
# California is Most Visited State Among Oregon's Target Audience; Oregon is 4th most Visited State, and Half of Oregonians Stayed in the State for Their Last Leisure Trip

As this sample is primarily the western US based, New York and Florida rank lower than on national surveys

States Visited on Most Recent Trip	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Sample Size	1999	1662	350	292	1349	1116	300	254
California	28%	29%	26%	26%	28%	30%	29%	31%
Washington	21%	21%	26%	28%	24%	23%	4%	4%
Nevada	18%	19%	12%	14%	19%	20%	18%	19%
Oregon	17%	18%	47%	48%	12%	13%	4%	5%
Idaho	11%	12%	7%	8%	14%	15%	2%	3%
Utah	10%	11%	6%	7%	12%	13%	5%	5%
New York	9%	10%	4%	4%	7%	8%	22%	22%
Florida	8%	9%	6%	7%	7%	8%	14%	15%
Arizona	7%	8%	4%	5%	7%	8%	10%	11%
Montana	7%	8%	3%	4%	9%	10%	2%	3%
Hawaii	7%	7%	7%	8%	6%	6%	8%	9%
Colorado	5%	6%	4%	5%	5%	6%	5%	6%
Texas	5%	5%	4%	5%	4%	5%	6%	7%

# For Every Region, Over Half of Travelers' Domestic Business Trips Include Leisure Activities

## Percentage of Business Trips that Include Leisure Activities



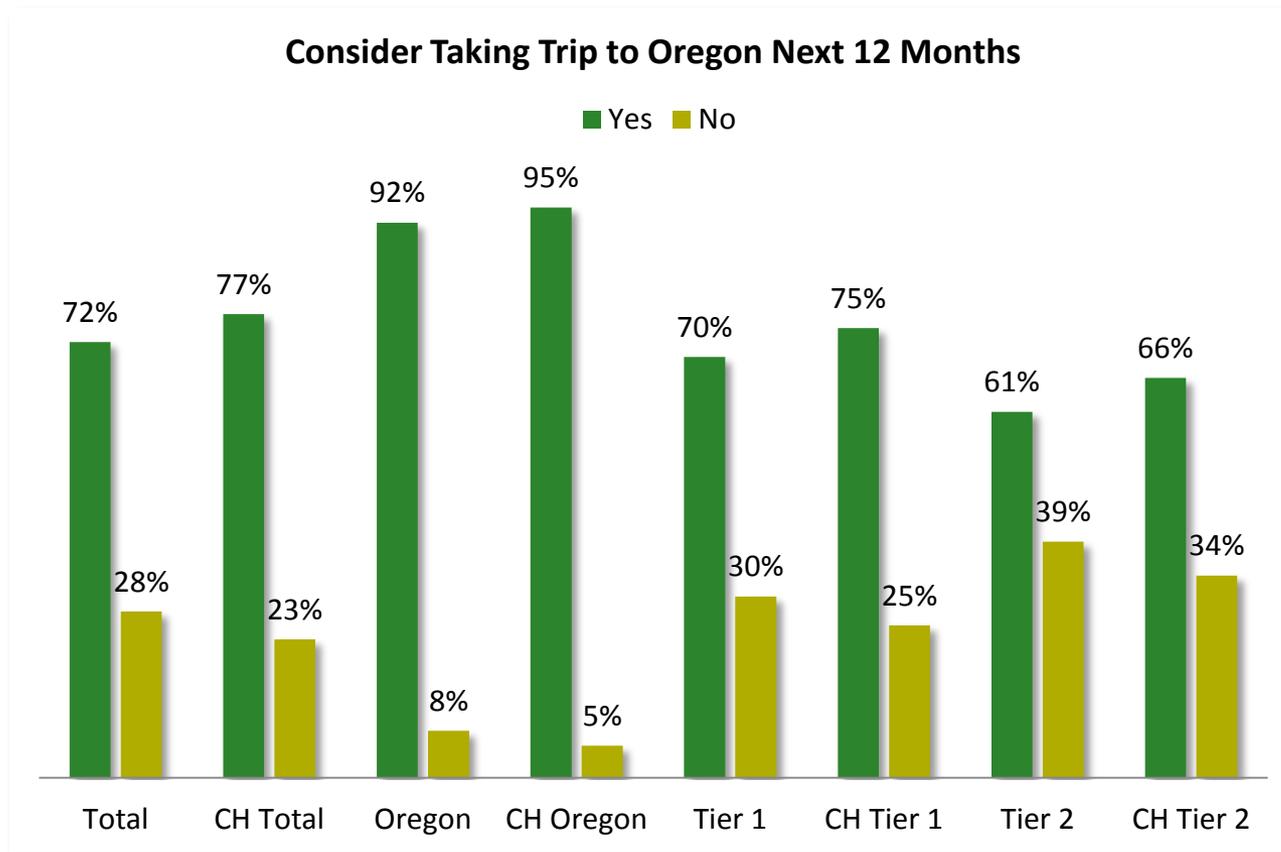
# Las Vegas Tops Cities Visited Among all Geographic Regions Surveyed

Top Cities Visited

	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Sample Size	2000	1662	350	292	1350	1116	300	254
Las Vegas	12%	12%	10%	10%	13%	13%	13%	13%
Seattle	8%	9%	10%	11%	9%	10%	4%	5%
New York City	8%	8%	7%	6%	8%	8%	7%	8%
Portland	7%	7%	9%	8%	7%	7%	5%	5%
Los Angeles	7%	8%	10%	11%	6%	7%	6%	7%
San Francisco	5%	6%	8%	8%	5%	6%	4%	4%
San Diego	4%	5%	3%	4%	4%	5%	3%	4%
Reno	3%	3%	3%	3%	3%	3%	3%	4%
Salt Lake City	3%	3%	3%	3%	3%	3%	3%	3%
Bellingham	3%	2%	2%	2%	3%	2%	2%	2%

Q10. And thinking about your most recent trip, what city or cities did you visit?

# Almost Three Quarters of Total Travelers Surveyed Are Considering Taking a Trip to Oregon in the Next 12 Months



Seven out of ten travelers would consider taking a trip to Oregon in the next 12 months. Eighty-five percent of those from Washington and 75% of those from Southern California also indicated they would consider taking a trip to Oregon.

# Among All Audiences, Windsurfing in Hood River and the John Day Fossil Beds Are Seen as *Least* Representative of Oregon

## % Ranking Each #1 or #2

Most Representative of Oregon	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
The Oregon Trail	25%	26%	17%	17%	26%	27%	32%	31%
Mt. Hood	23%	22%	24%	24%	21%	21%	27%	27%
Crater Lake	21%	21%	29%	30%	19%	19%	21%	21%
Oregon's public beaches	19%	19%	33%	35%	18%	18%	9%	9%
Columbia River/Gorge	15%	15%	16%	17%	15%	14%	12%	12%
Coastal Lighthouses	11%	12%	8%	8%	12%	14%	10%	9%
Oregon Caves	10%	10%	4%	4%	12%	12%	10%	11%
Multnomah Falls	9%	9%	14%	15%	8%	8%	4%	4%
Portland Rose Festival	8%	7%	12%	11%	7%	6%	7%	7%
Oregon Wineries	7%	8%	5%	5%	8%	9%	9%	10%
Oregon Shakespeare Festival (Ashland)	6%	7%	5%	5%	6%	7%	7%	7%
Hay Stack Rock at Cannon Beach	6%	6%	5%	5%	7%	7%	3%	3%
Fort Clatsop (Lewis and Clark expedition)	5%	5%	3%	3%	5%	6%	5%	5%
Oregon Microbreweries	4%	4%	5%	4%	4%	4%	4%	5%
Portland Art Museum	4%	4%	1%	1%	4%	5%	6%	7%
Painted Hills	4%	3%	1%	1%	4%	4%	6%	5%
Timberline Lodge	4%	3%	6%	5%	3%	2%	5%	5%
Covered Bridges	3%	3%	1%	2%	4%	4%	5%	5%
Pendleton Roundup	3%	2%	4%	4%	3%	2%	3%	2%
Cycle Oregon	3%	3%	0%	0%	3%	3%	4%	4%
Smith Rock (Bend)	2%	2%	1%	1%	2%	2%	4%	4%
Bandon Dunes Golf Courses	2%	2%	4%	3%	2%	2%	2%	2%
John Day Fossil Beds	2%	2%	2%	1%	2%	2%	3%	3%
Windsurfing in Hood River	2%	2%	1%	1%	2%	2%	3%	3%

Oregonian travelers' opinions about the activities/attractions that are most representative of Oregon vary significantly among Tier 1 and 2 travelers.

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?

# To Oregonians, Public Beaches Have the Most Impact on Trip Planning, But in General, Greater Awareness of Activities Equals Greater Impact

**% Ranking Each #1 or #2**

Most Impactful Attractions	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Oregon's public beaches	24%	25%	47%	49%	21%	22%	13%	12%
Crater Lake	20%	20%	22%	21%	20%	19%	21%	21%
The Oregon Trail	17%	17%	5%	5%	20%	20%	19%	20%
Mt. Hood	16%	15%	12%	14%	16%	15%	19%	19%
Coastal Lighthouses	13%	13%	13%	13%	13%	13%	13%	12%
Columbia River/Gorge	12%	12%	14%	13%	13%	12%	9%	9%
Multnomah Falls	11%	11%	15%	14%	10%	10%	8%	7%
Oregon Caves	11%	10%	4%	4%	12%	11%	12%	13%
Oregon Wineries	10%	10%	11%	10%	10%	10%	9%	9%
Portland Rose Festival	7%	7%	7%	6%	6%	7%	9%	8%
Oregon Shakespeare Festival (Ashland)	7%	7%	5%	6%	7%	7%	8%	9%
Oregon Microbreweries	6%	6%	8%	9%	5%	6%	7%	7%
Hay Stack Rock at Cannon Beach	6%	6%	7%	7%	6%	7%	3%	3%
Painted Hills	5%	5%	3%	4%	5%	5%	7%	6%
Portland Art Museum	4%	5%	4%	4%	4%	4%	7%	7%
Fort Clatsop (Lewis and Clark expedition)	4%	5%	2%	3%	4%	5%	6%	7%
Covered Bridges	4%	4%	3%	3%	4%	5%	5%	4%
Bandon Dunes Golf Courses	4%	4%	4%	3%	4%	4%	3%	3%
John Day Fossil Beds	4%	4%	2%	2%	4%	5%	4%	4%
Timberline Lodge	4%	4%	3%	3%	3%	3%	6%	5%
Pendleton Roundup	3%	3%	3%	3%	3%	2%	3%	3%
Smith Rock (Bend)	3%	3%	2%	2%	3%	3%	3%	3%
Cycle Oregon	3%	3%	1%	1%	3%	3%	4%	3%
Windsurfing in Hood River	2%	3%	1%	1%	2%	3%	4%	4%

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



# Tier 2 Respondents Are More Likely than Tier 1 Respondents to Appreciate the Landscape and Coastline of Oregon

Perhaps Oregonians take the landscape and natural beauty of the state for granted

Among Those Considering a Trip to Oregon in the Next 12 Months	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Sample Size	846	701	167	145	557	451	122	105
Beaches/Oregon Coastline	22%	18%	11%	12%	19%	19%	17%	18%
Landscape/Scenery/Natural Beauty	21%	19%	17%	18%	20%	18%	28%	29%
Attractions: Light House Malls Historical Places/Gardens/Bookstores	10%	10%	9%	9%	10%	11%	8%	8%
Visiting family	9%	9%	11%	12%	9%	9%	7%	7%
Nice/ Great/Awesome	9%	10%	10%	10%	10%	10%	5%	6%
Love the Outdoors/getting out into nature	6%	6%	6%	5%	6%	5%	6%	7%
Mountains/beautiful hills/ Mt Hood/painted hills/ volcanic mountains/Haystack rock	8%	8%	9%	9%	6%	7%	7%	8%
Natural Attractions/Crater Lake area/diversity of attractions	7%	7%	8%	6%	7%	7%	7%	8%
It's not far/ closer than other states	5%	6%	6%	7%	5%	6%	2%	2%
Shopping/Tax free shopping /No sales tax	5%	6%	12%	12%	4%	5%	5%	4%
New things to see/something different/new place to explore/ Unique Experience/Learning new things	4%	4%	5%	5%	3%	3%	5%	5%
Born/Live There	3%	2%	1%	0%	4%	2%	5%	5%
Never been there before/Never experienced	3%	3%	2%	2%	3%	3%	1%	1%
Friendly people New People/ friends Different people Nice Communities /less people	3%	3%	3%	2%	3%	4%	1%	1%

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

# Four in Ten Oregonians State They Would Rather Visit Another State When Asked About Their Primary Reason for Not Traveling in Oregon

Reasons for Not Taking Trip to OR	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Sample Size	551	383	27	15	406	282	118	85
I'd rather visit another State	20%	23%	27%	40%	19%	21%	22%	28%
No friends family to visit	9%	11%	3%	5%	11%	13%	4%	6%
Considering a different destination	9%	9%	5%	8%	6%	5%	22%	19%
I don't know what there is to do or see there	4%	4%	0%	0%	4%	5%	6%	3%
It is too far to travel to	8%	8%	0%	0%	8%	8%	8%	8%
Its too expensive	18%	17%	0%	0%	20%	19%	15%	11%
Don't like the weather	15%	16%	9%	0%	16%	17%	13%	15%
Not easily accessible	3%	3%	0%	0%	3%	3%	3%	5%
Other please specify	14%	10%	57%	47%	13%	9%	7%	6%

Q43b. What is the primary reason you would not consider taking a trip to Oregon?

# An Opportunity Exists to Make Those in Tier Two More Aware of the Icons in Oregon; As Expected, Oregonians Know Their State Well

Awareness of Oregon Icons	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Total - Weighted Count	<b>2000</b>	<b>1662</b>	<b>350</b>	<b>292</b>	<b>1350</b>	<b>1116</b>	<b>300</b>	<b>254</b>
The Oregon Trail	61%	62%	89%	90%	58%	59%	45%	47%
Mt Hood	58%	58%	94%	94%	54%	53%	37%	38%
Crater Lake	54%	54%	93%	93%	49%	49%	33%	34%
Columbia RiverGorge	46%	46%	88%	88%	40%	39%	24%	26%
Oregons public beaches	43%	44%	89%	89%	37%	39%	15%	16%
Coastal Lighthouses	39%	40%	79%	81%	32%	34%	21%	23%
Portland Rose Festival	37%	38%	88%	90%	29%	29%	14%	16%
Oregon Caves	37%	38%	82%	83%	29%	31%	18%	20%
Oregon Wineries	36%	38%	79%	82%	28%	31%	18%	21%
Multnomah Falls	35%	35%	86%	87%	26%	27%	12%	13%
Oregon Shakespeare Festival Ashland	30%	31%	75%	76%	21%	22%	12%	14%
Oregon Microbreweries	27%	29%	74%	77%	18%	19%	12%	14%
Portland Art Museum	27%	29%	71%	75%	18%	20%	14%	16%
Pendleton Roundup	25%	25%	68%	70%	18%	16%	8%	8%
Hay Stack Rock at Cannon Beach	24%	24%	71%	72%	15%	16%	5%	5%
Covered Bridges	24%	25%	68%	70%	15%	16%	13%	14%
Timberline Lodge	23%	24%	77%	78%	13%	13%	8%	9%
Fort Clatsop Lewis and Clark expedition	22%	23%	62%	63%	15%	16%	7%	8%
Windsurfing in Hood River	21%	22%	62%	63%	14%	14%	7%	8%
John Day Fossil Beds	19%	20%	60%	61%	12%	13%	6%	7%
Bandon Dunes Golf Courses	16%	17%	50%	51%	10%	11%	6%	7%
Painted Hills	15%	16%	37%	38%	11%	11%	11%	12%
Smith Rock Bend	15%	16%	47%	49%	8%	9%	7%	8%
Cycle Oregon	15%	16%	49%	51%	7%	8%	10%	11%
None of the above	12%	11%	0%	0%	13%	12%	21%	18%

In addition, an opportunity exists to make all travelers aware of the diversity of activities, both classic and trendy.

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

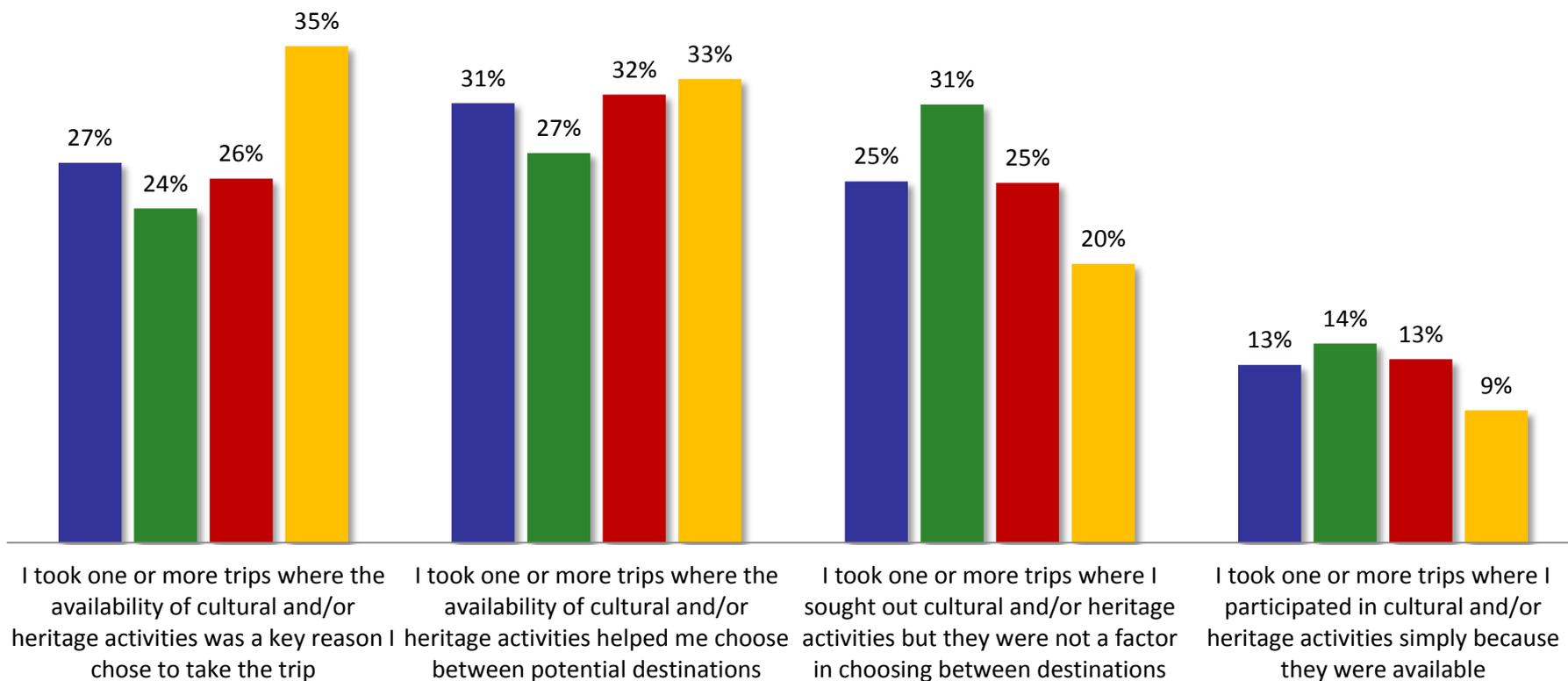


# Cultural And Heritage Activities As A Driver Of Trips Taken

# Culture and Heritage Activities Are More of a Driver of Destination Choice For Those in Tier 2

## Driver of Destination Choice

■ Total ■ Oregon ■ Tier 1 ■ Tier 2

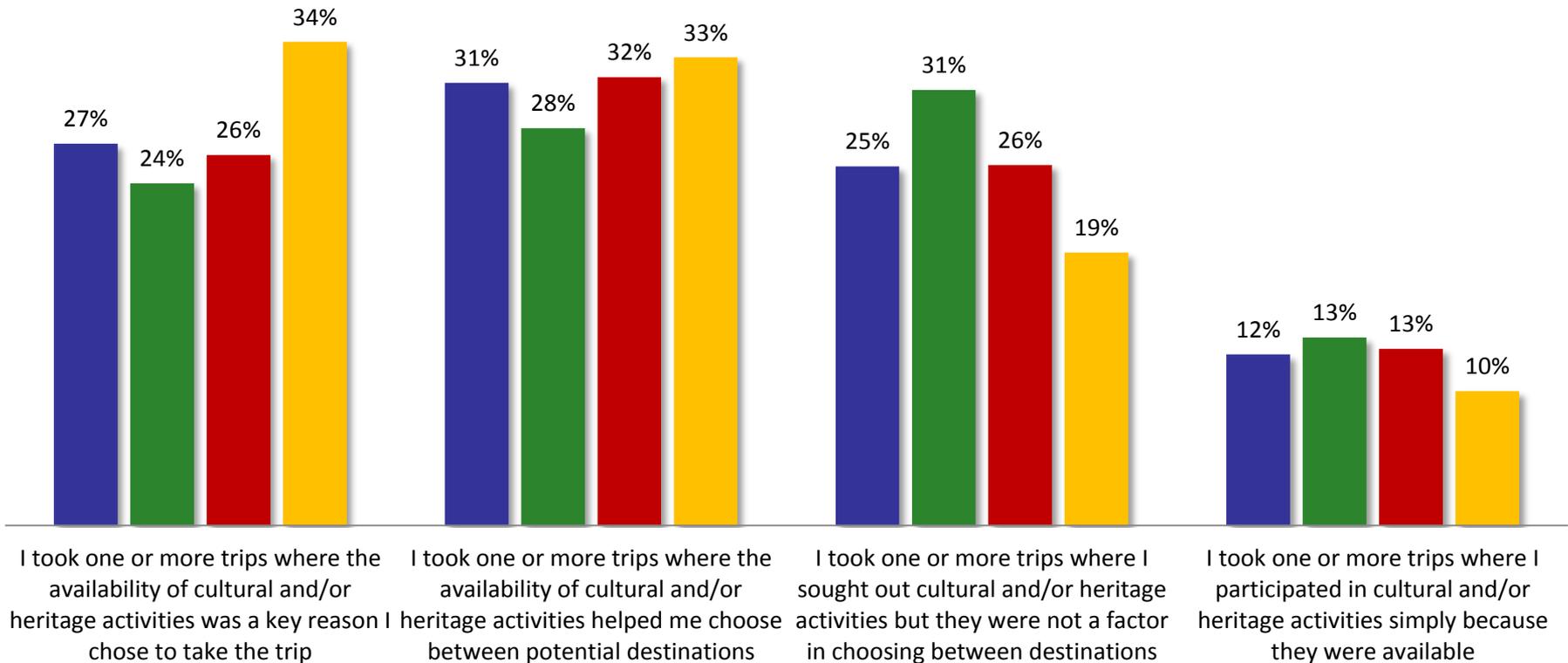


Q38. Now, thinking about all the trips you have taken over the past three (3) years in which you participated in cultural and/or heritage activities, which statement best describes you?  
 Base: people taking trips over the past 3 years with C/H activities (n=1364)

# Driver of Destination Choice is Almost Identical Between CH and Non CH Travelers Within Oregon and Feeder Markets

## Driver of Destination Choice

■ CH Total ■ CH Oregon ■ CH Tier 1 ■ CH Tier 2



# Half of Travelers Took a Scenic Drive So Offerings Along the Way and Suggested Itineraries Would Help Enhance Their Overall Experience

Top 20 Activities Done on Most Recent Trip	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Sample size	2000	1662	350	292	1350	1116	300	254
Took a scenic drive	50%	56%	53%	58%	50%	56%	45%	49%
Shopped (general, not locally made crafts/memorabilia)	50%	54%	50%	53%	51%	55%	46%	48%
Explored small towns	39%	44%	45%	49%	38%	43%	36%	41%
Self-guided walking tour	38%	42%	40%	43%	38%	43%	36%	41%
Visited beaches/waterfronts	36%	39%	42%	45%	35%	38%	33%	35%
Shopped at an outlet mall	34%	39%	28%	31%	36%	41%	33%	37%
Shopped for items made by local artisans and craftspeople	34%	38%	38%	42%	33%	37%	34%	39%
Went to a fine dining restaurant for a unique and memorable experience	30%	33%	28%	29%	30%	33%	35%	38%
Experienced local or regional cuisine for a unique and memorable experience (not fine dining)	30%	34%	28%	32%	31%	35%	27%	31%
Visited state/national parks	29%	33%	34%	38%	28%	32%	27%	31%
Visited heritage buildings/historical buildings	27%	32%	26%	31%	27%	32%	31%	36%
Visited a local farmers market	27%	31%	26%	30%	28%	32%	26%	30%
Visited historic sites	26%	30%	27%	31%	26%	30%	27%	30%
Participated in night life	26%	29%	23%	27%	25%	29%	30%	33%
Explored urban neighborhoods	26%	29%	23%	25%	26%	30%	27%	31%
Visited art museums/galleries	25%	29%	25%	29%	24%	28%	28%	32%
Gambled	24%	25%	21%	22%	24%	25%	29%	30%
Sampled traditional artisan products (e.g., cheeses, candies, jams, etc.)	24%	28%	24%	27%	24%	28%	23%	27%
Participated in sports (golf, hiking, biking, birding, boating/sailing, hunting, fishing, snow sports, etc.)	21%	23%	24%	27%	21%	23%	19%	22%
Shopped for gourmet food and wine	21%	24%	17%	18%	21%	25%	23%	27%

Effective advertising is not only about destination marketing but the experiences that travelers gather along the way

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.

# There Appears to Be a Disconnect Between Awareness and Visitation of Oregon Beaches Among Tier 2 Travelers

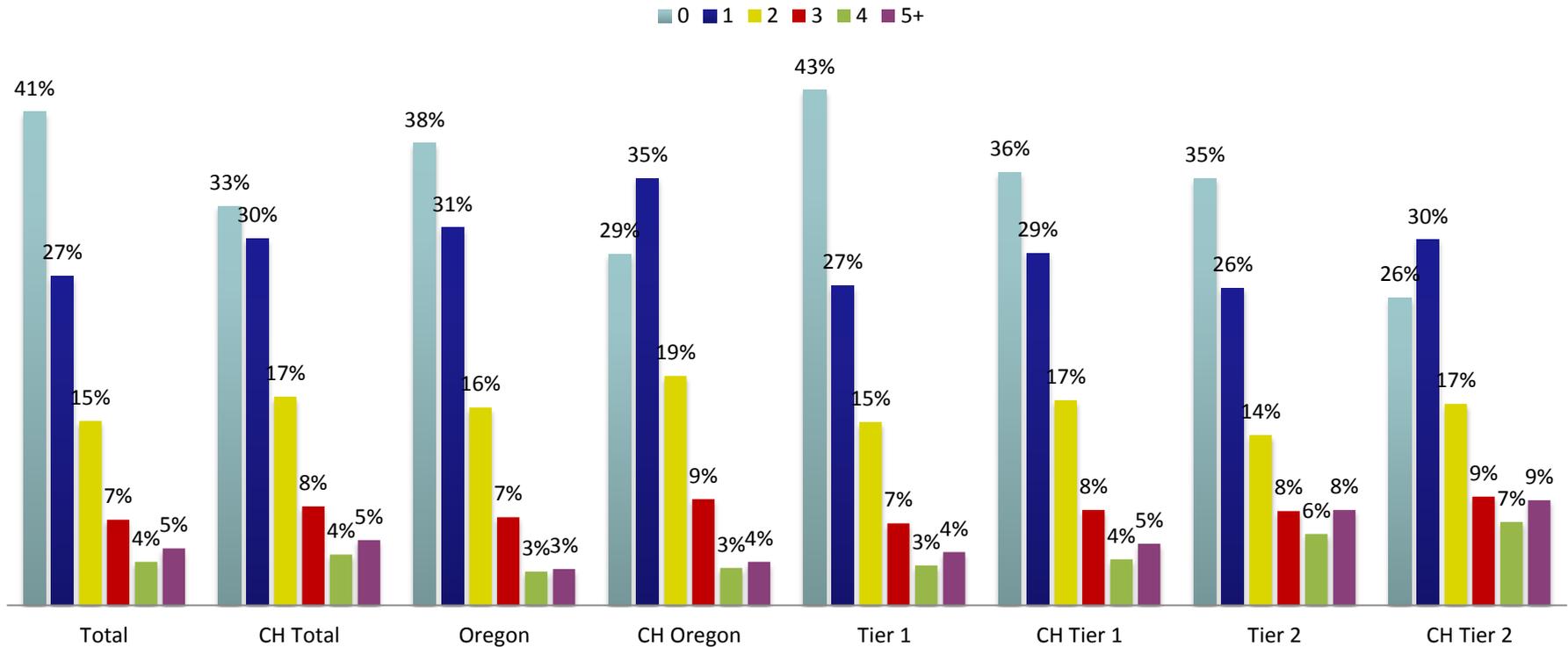
Top 20 Activities Done in Past 3 Years	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Sample Size	2000	1662	350	292	1350	1116	300	254
Visited beaches/waterfronts	43%	47%	50%	54%	42%	46%	41%	46%
Took a scenic drive	42%	47%	48%	51%	41%	45%	42%	48%
Visited state/national parks	42%	48%	45%	50%	42%	49%	38%	43%
Shopped (general, not locally made crafts/memorabilia)	40%	43%	42%	45%	39%	42%	42%	45%
Shopped at an outlet mall	39%	45%	42%	48%	39%	44%	38%	42%
Explored small towns	39%	43%	38%	44%	39%	43%	38%	44%
Visited art museums/galleries	38%	44%	41%	47%	38%	44%	39%	45%
Visited a local farmers market	38%	43%	42%	48%	37%	41%	37%	42%
Visited historic sites	38%	44%	40%	46%	37%	44%	38%	44%
Visited zoos	37%	43%	38%	44%	37%	43%	36%	41%
Attended an art/craft fair or festival	37%	42%	38%	45%	37%	42%	33%	39%
Camped	36%	41%	38%	41%	38%	43%	28%	32%
Visited heritage buildings/historical buildings	36%	42%	40%	47%	36%	42%	35%	41%
Shopped for items made by local artisans and craftspeople	36%	40%	39%	42%	36%	40%	34%	39%
Visited theme or amusement parks	36%	41%	30%	33%	37%	43%	40%	44%
Went to a fine dining restaurant for a unique and memorable experience	36%	40%	39%	43%	35%	40%	38%	41%
Visited aquariums	35%	40%	38%	41%	35%	40%	33%	38%
Attended a live music performance (not classical)	34%	39%	33%	38%	34%	39%	33%	38%
Visited history museums/centers	33%	40%	35%	43%	32%	39%	37%	43%
Visited science museums/centers	33%	39%	35%	41%	32%	38%	35%	40%

Making travelers in Tier 2 more aware of the beauty of Oregon's beaches may enhance their visitation

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.

# Tier 2 Respondents Took Twice as Many Trips That They Considered Cultural and Heritage Trips, Compared to Tier 1

## Number of Trips They Consider CH Trips



Q36. Thinking about the leisure trips you took in the US in the past 12 months, how many of those would you describe as cultural and/or heritage trips?

# Behaviors and Motivators

# CH Tier 1 and 2 Travelers Are More Likely to Seek Out Local Cuisine and Spend More on CH Activities As Well As on Lodging That Reflects the Destination

	Total	Total - CH	Total Oregon	Oregon_CH	Total Tier 1	Tier1 CH	Total Tier 2	Tier2 CH
Sample Size	1999	1662	350	292	1349	1116	300	254
I would pay more for lodging that reflects the cultural and/or heritage destination I am visiting	76%	83%	76%	81%	76%	84%	76%	85%
I spend more money on cultural and/or heritage activities while I am on a trip	73%	78%	71%	77%	73%	78%	74%	79%
I want my travel to always be educational so I make an effort to explore and learn about the local arts culture environment	67%	73%	65%	72%	66%	72%	74%	80%
I like to bring back local/regional memorabilia from the places I visit and share them with my friends and family	64%	70%	70%	78%	60%	67%	72%	77%
I am willing to pay more for travel experiences that do not harm the environment	61%	66%	61%	68%	60%	65%	65%	70%
I often giveback by donating money volunteering etc to the cultural and/or heritage destinations I have visited while on	54%	62%	55%	63%	54%	60%	58%	66%
I like to pursue a life of challenge novelty and change	53%	58%	53%	56%	53%	57%	56%	62%
I prefer taking trips that are a combination of a wide variety of activities such as culture shopping nature exercise	45%	51%	45%	52%	43%	49%	51%	58%
I seek travel experiences where the destination its buildings and surroundings have retained their historic character	41%	46%	39%	44%	39%	44%	54%	60%
I believe tasting foods/wines of the region I'm visiting is an important part of the cultural and/or heritage travel experience	37%	43%	30%	35%	38%	44%	45%	50%

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



# Consistent with General Leisure Travelers, Relieving Stress and Creating Lasting Memories are Top Motivators for Oregon's Key Markets

Agreement with Motivators	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Sample Size	1999	1662	350	292	1349	1116	300	254
Relaxing and relieving stress	57%	59%	60%	61%	57%	59%	54%	56%
Creating lasting memories	54%	58%	53%	58%	55%	59%	50%	54%
Enriching my relationship with my spouse partner children	48%	51%	46%	48%	49%	52%	43%	45%
Trying a new experience	36%	40%	34%	39%	36%	40%	39%	44%
Having stories to share back home	30%	34%	31%	35%	30%	33%	32%	36%
To stimulate your mind be intellectually challenged	26%	30%	26%	30%	25%	30%	28%	33%
Pampering yourself	25%	27%	22%	25%	25%	26%	28%	30%
Pursuing outdoor recreational activities	24%	26%	24%	26%	24%	26%	26%	30%
Learning more about history and local cultures	24%	27%	26%	30%	22%	25%	29%	33%
Explore a different culture	23%	28%	21%	24%	22%	27%	30%	35%
Providing educational experiences for my children	20%	23%	16%	18%	20%	23%	23%	26%
Pursuing a hobby	17%	19%	17%	19%	17%	18%	20%	22%
Challenging myself physically to feel physically energized	17%	19%	15%	17%	16%	18%	20%	23%
Seeking out solitude and isolation	16%	17%	17%	18%	16%	17%	17%	19%

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

# Trip Planning

# CH Tier 2 Travelers Are Slightly Less Likely to Take Recommendations from Friends and Family When Gathering Information for Their Trip

Tier 2 respondents are more likely to request brochures and information that can be sent to them in the mail

	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Sample Size	1999	1662	350	292	1349	1116	300	254
I go directly to the websites of the destination I am thinking of visiting	58%	62%	59%	64%	59%	63%	55%	56%
I get recommendations from friends and family members (word-of-mouth)	57%	59%	59%	62%	58%	60%	49%	52%
I conduct a general web search, such as with Google or Yahoo	52%	56%	55%	59%	51%	55%	50%	53%
I do research on 3rd party travel websites such as Orbitz.com, Expedia.com or Travelocity.com	34%	37%	35%	38%	34%	37%	34%	36%
I read online reviews by "official sources" of the destination I am thinking of visiting	28%	31%	26%	29%	28%	31%	30%	32%
I read user generated sources (Trip Advisor, Virtual Tourist, etc.) for the destination I am thinking of visiting	23%	26%	26%	29%	23%	25%	23%	25%
I read travel and travel related magazines	20%	23%	19%	21%	20%	22%	24%	26%
I request that brochures and information be sent to me in the mail of the travel destinations I am thinking of visiting	19%	21%	17%	18%	19%	21%	24%	24%
I read the travel section of my newspaper	15%	17%	15%	16%	15%	17%	19%	20%
I read independently published reviews in magazines and newspapers of the destination I am thinking of visiting	15%	17%	17%	18%	14%	16%	18%	20%
I ask my friends on Facebook	15%	17%	15%	17%	16%	18%	14%	16%
I consult with a travel agent	13%	14%	9%	8%	13%	14%	16%	17%
I contact convention and visitors bureaus	9%	11%	8%	10%	9%	10%	13%	14%
I do a search on Facebook	5%	6%	6%	7%	5%	6%	4%	5%
Other please specify	6%	4%	7%	6%	6%	5%	4%	3%

Q28B: How do you typically gather information about leisure trips you plan to take within the United States?

# Slightly More Cultural and Heritage Tier 2 Travelers Start with No Destination in Mind But Know When They Want to Travel

CH Tier 2 travelers are also slightly more likely to start with a certain type of travel experience in mind

	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Sample Size	1999	1662	350	292	1349	1116	300	254
Started with a desired destination(s) in mind	65%	64%	69%	67%	63%	63%	65%	65%
Started considering specific events you wanted to do	14%	16%	10%	12%	14%	15%	19%	21%
Started with a certain type of travel experience in mind	23%	24%	26%	28%	21%	23%	25%	28%
Started with dates in mind, no particular destination in mind	22%	24%	20%	22%	22%	24%	24%	27%
Looked for packaged deals – no destination in mind	9%	10%	5%	6%	9%	10%	11%	13%
Don't Know Rather not say	2%	2%	0%	0%	3%	2%	1%	1%
Other please specify	5%	4%	5%	5%	5%	4%	5%	3%

# More Than Half of The Total Travelers Book Within 30 Days of Their Trip

Booking Their Trip	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Sample Size	1999	1662	350	292	1349	1116	300	254
Same day	4%	3%	4%	4%	4%	3%	2%	2%
1-3 days	8%	8%	8%	9%	8%	8%	9%	9%
4-6 days	9%	8%	10%	9%	8%	8%	12%	12%
7-14 days	16%	17%	17%	18%	16%	16%	19%	20%
15-21 days	10%	10%	10%	10%	10%	10%	11%	12%
22-30 days	10%	11%	10%	10%	10%	11%	13%	12%
31 days 60 days	20%	20%	19%	18%	21%	21%	15%	15%
61-90 days	9%	9%	10%	11%	9%	8%	10%	10%
More than 90 days	12%	12%	11%	10%	13%	13%	9%	8%
Don't Know Rather not say	2%	2%	3%	2%	3%	2%	0%	0%

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

# Eating At Nice Restaurants And CH Attractions Are Almost Equally Important To Total CH Travelers And CH Travelers From Oregon

For CH travelers in Tier 2, CH attractions and activities is more important than eating at nice restaurants. While for general leisure travelers overall and among the tiers, eating at nice restaurants is most important.

## % Ranking Each #1

Decision Factors	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Eating at nice restaurants	34%	31%	31%	30%	34%	32%	35%	31%
Outdoor activities	31%	27%	36%	27%	31%	27%	24%	27%
Cultural and Heritage attractions and activities	27%	30%	28%	30%	26%	29%	32%	35%
Cycling opportunity	8%	8%	5%	6%	9%	9%	9%	10%

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.



# Booking Behavior

# Cultural and Heritage Tier 2 Travelers Are Most Likely to Book Their Travel Using an Online Travel Site

Flights	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Sample Size	1999	1662	350	292	1349	1116	300	254
Used online travel agency Expedia/ Orbitz/Travelocity etc.	17%	18%	13%	14%	17%	19%	19%	21%
Booked directly via company website	13%	13%	11%	12%	13%	13%	14%	15%
Used traditional travel agent	8%	9%	8%	8%	8%	9%	10%	10%
Booked directly with travel company by telephone	3%	3%	2%	2%	3%	4%	4%	5%
Booked directly with travel company online	3%	3%	1%	2%	4%	3%	3%	3%
Booked through the destinations website	2%	2%	1%	0%	2%	2%	2%	3%
Booked in person after arrival	1%	1%	0%	0%	1%	1%	1%	1%
Not applicable	53%	51%	64%	62%	52%	50%	47%	42%

Q23: How did you book the components of your most recent leisure trip n=1999

Other Transport	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Sample Size	1999	1662	350	292	1349	1116	300	254
Booked directly via company website	12%	12%	9%	10%	11%	12%	16%	17%
Used online travel agency Expedia/ Orbitz /Travelocity etc	10%	11%	7%	8%	10%	12%	14%	15%
Used traditional travel agent	7%	7%	8%	8%	6%	7%	9%	10%
Booked in person after arrival	6%	7%	4%	5%	7%	7%	6%	6%
Booked directly with travel company by telephone	4%	4%	3%	4%	4%	4%	4%	4%
Booked directly with travel company online	2%	2%	1%	1%	2%	2%	2%	2%
Booked through the destinations website	2%	2%	0%	0%	2%	2%	3%	3%
Not applicable	58%	55%	67%	64%	58%	55%	47%	44%

# Destination Websites May Entice People to Travel But It is Not Through These Websites That They Book

Accommodation	Total	Total CH	Oregon	Oregon CH	Total Tier 1	Tier1 CH	Total Tier 2	Tier2 CH
sample size	1999	1662	350	292	1349	1116	300	254
Booked directly via company website	19%	20%	18%	19%	18%	19%	23%	23%
Used online travel agency Expedia/ Orbitz/ Travelocity etc.	17%	19%	13%	14%	18%	20%	16%	19%
Booked through the destinations website	10%	10%	11%	12%	10%	10%	9%	8%
Booked in person after arrival	9%	9%	12%	13%	8%	9%	9%	9%
Used traditional travel agent	7%	8%	8%	8%	6%	7%	9%	10%
Booked directly with travel company by telephone	6%	6%	4%	4%	6%	7%	9%	9%
Booked directly with travel company online	3%	3%	1%	1%	3%	3%	2%	3%
Not applicable	29%	25%	32%	29%	30%	25%	22%	20%

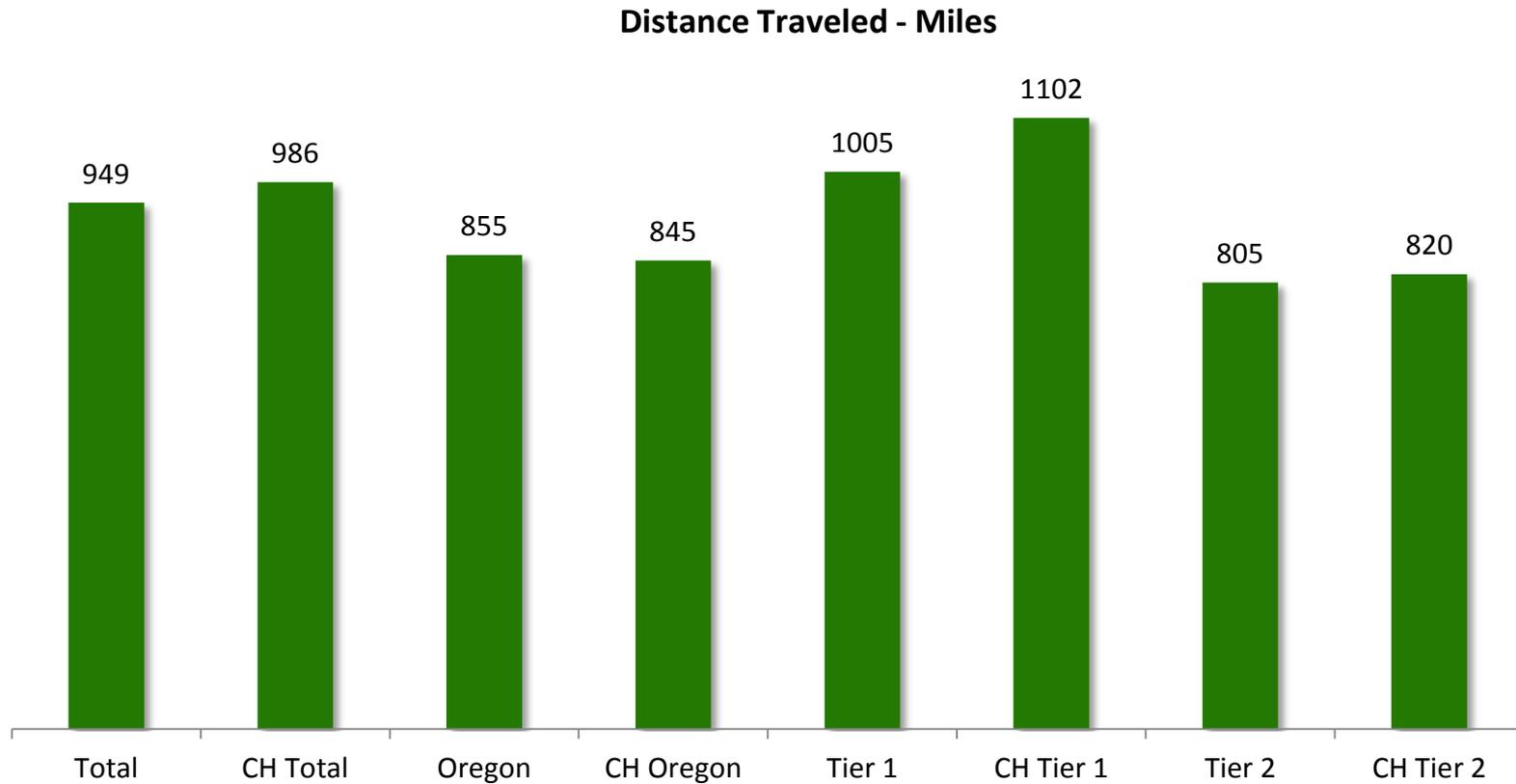
Activities and Event Tickets	Total	Total CH	Oregon	Oregon CH	Total Tier 1	Tier1 CH	Total Tier 2	Tier2 CH
sample size	1999	1662	350	292	1349	1116	300	254
Booked in person after arrival	20%	22%	21%	22%	21%	23%	17%	18%
Booked directly via company website	12%	13%	9%	10%	12%	13%	14%	15%
Used online travel agency Expedia/Orbitz/ Travelocity etc.	7%	8%	5%	6%	7%	8%	11%	13%
Used traditional travel agent	6%	6%	5%	6%	5%	6%	8%	9%
Booked through the destinations website	6%	5%	6%	5%	6%	5%	5%	5%
Booked directly with travel company by telephone	3%	4%	3%	3%	3%	4%	4%	4%
Booked directly with travel company online	2%	2%	%	1%	2%	2%	2%	2%
Not applicable	45%	40%	51%	47%	45%	40%	39%	34%

Q23: How did you book the components of your most recent leisure trip?



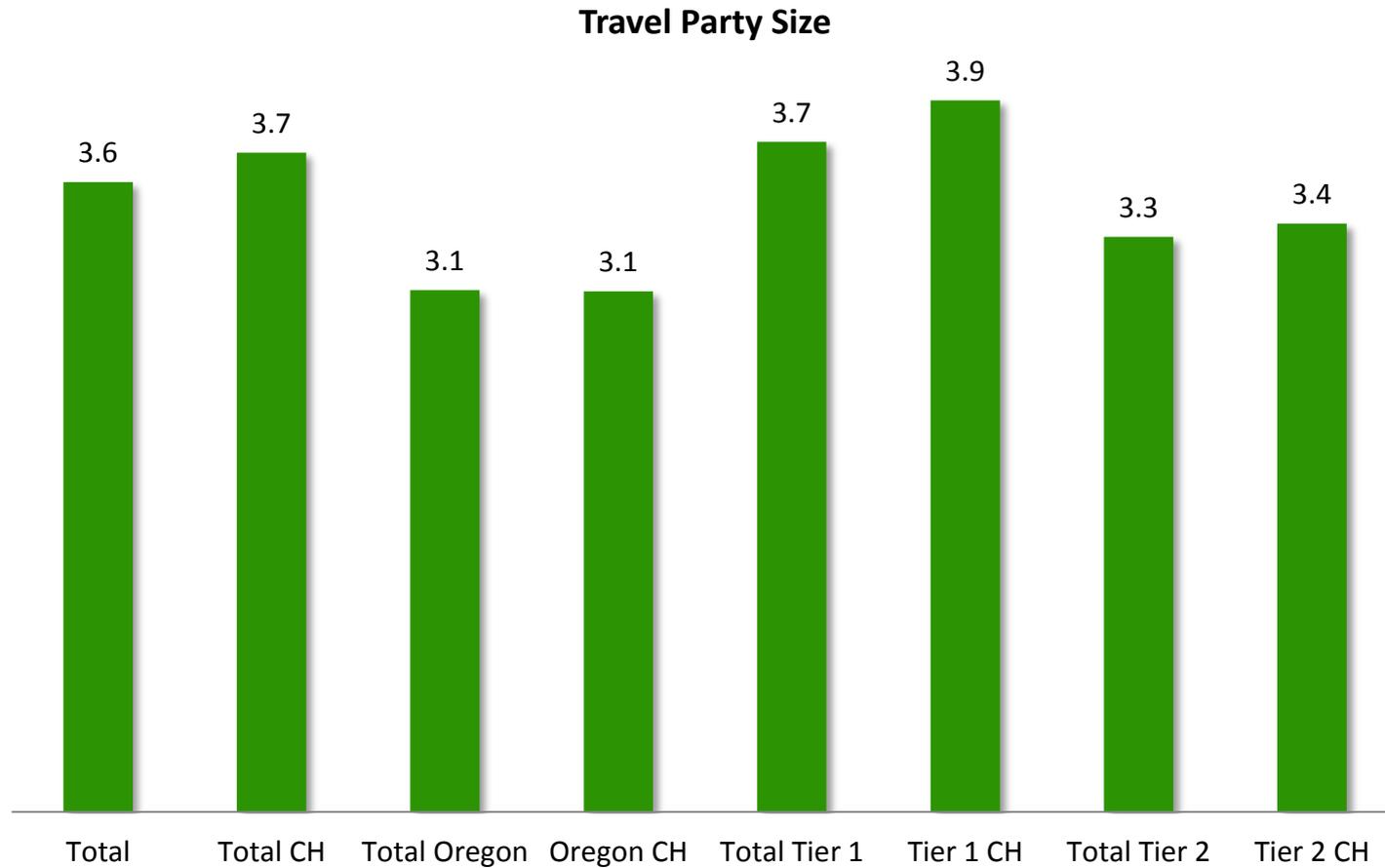
# Trip Characteristics

# While Tier 1 Includes Canadian Provinces, the Distance They Travel for Their Trip is Not Significantly Greater than Other Regions



Q18: On your most recent trip how far did you travel from your home one-way to get to this destination n=2000

# All Travel Parties Are Comprised of Four or Fewer Individuals with the Lowest Party Size from Oregon



Q13b. Including yourself, how many people were in your travel party on this most recent trip?

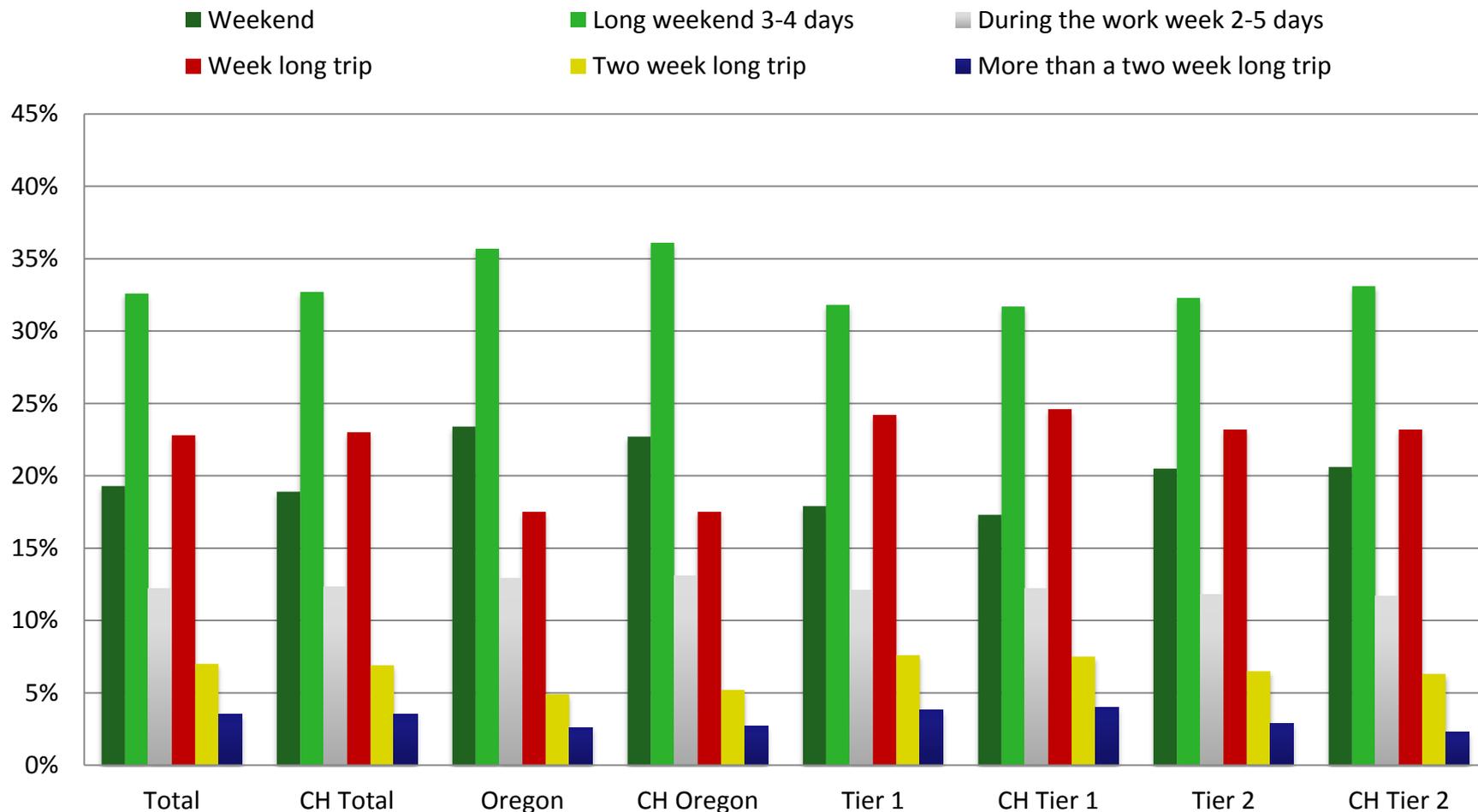
# Over Half of All Populations Surveyed Travel with Their Spouse or Significant Others; Another One-Fifth Travel with Other Family Members

With Whom Did You Travel	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
	1999	1662	350	292	1349	1116	300	254
Traveled with my spouse or significant other	53%	53%	53%	52%	53%	54%	53%	53%
Traveled with other family members	20%	21%	21%	21%	20%	22%	19%	20%
Traveled with child/children under 18	19%	19%	19%	18%	20%	20%	17%	18%
Traveled alone	19%	18%	19%	17%	19%	19%	20%	18%
Traveled with friends	19%	20%	18%	19%	17%	18%	26%	29%
Traveled with adult/ child/children	9%	10%	10%	12%	9%	9%	10%	11%
Traveled with coworkers	4%	5%	3%	3%	4%	4%	10%	11%
Traveled with organized group tour	2%	2%	1%	1%	2%	2%	1%	2%
Other please specify	1%	1%	3%	2%	1%	1%	1%	1%

Q13a. And, with whom did you travel on this most recent trip?

# The Long Weekend is the Most Likely Length of a CH Trip Across All Geographies

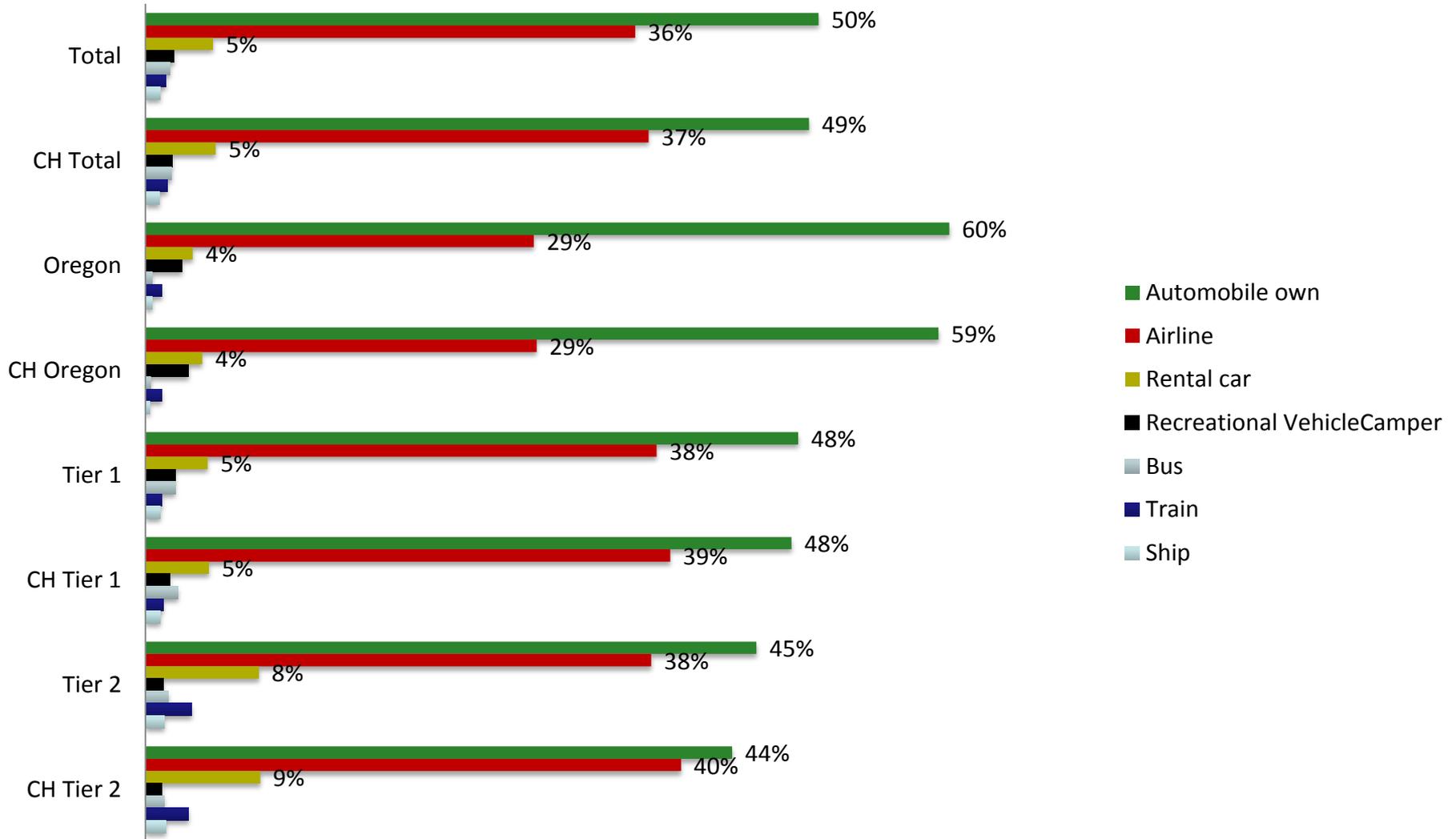
## Length of Cultural and Heritage Trip



Q37. Typically, how long are your cultural and/or heritage trips?

# Travelers Were More Likely to Drive, Followed by Flying, On Their Most Recent Trip

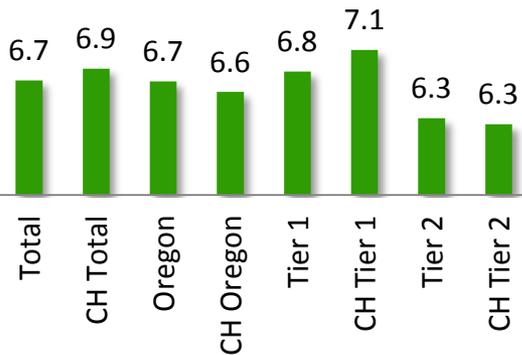
Mode of Transport on Most Recent Trip



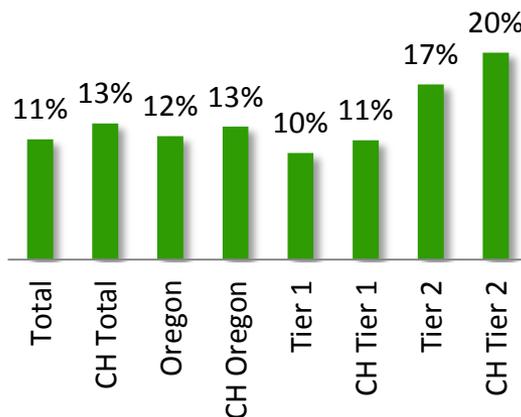
Q19. Which of the following was your primary mode of transportation to get to the destination of your most recent trip?

# Travelers Stay About a Week, and Primarily in Hotels; Those in CH Tier 2 Are Most Likely to Stay in Historic Property

### Average Length of Stay



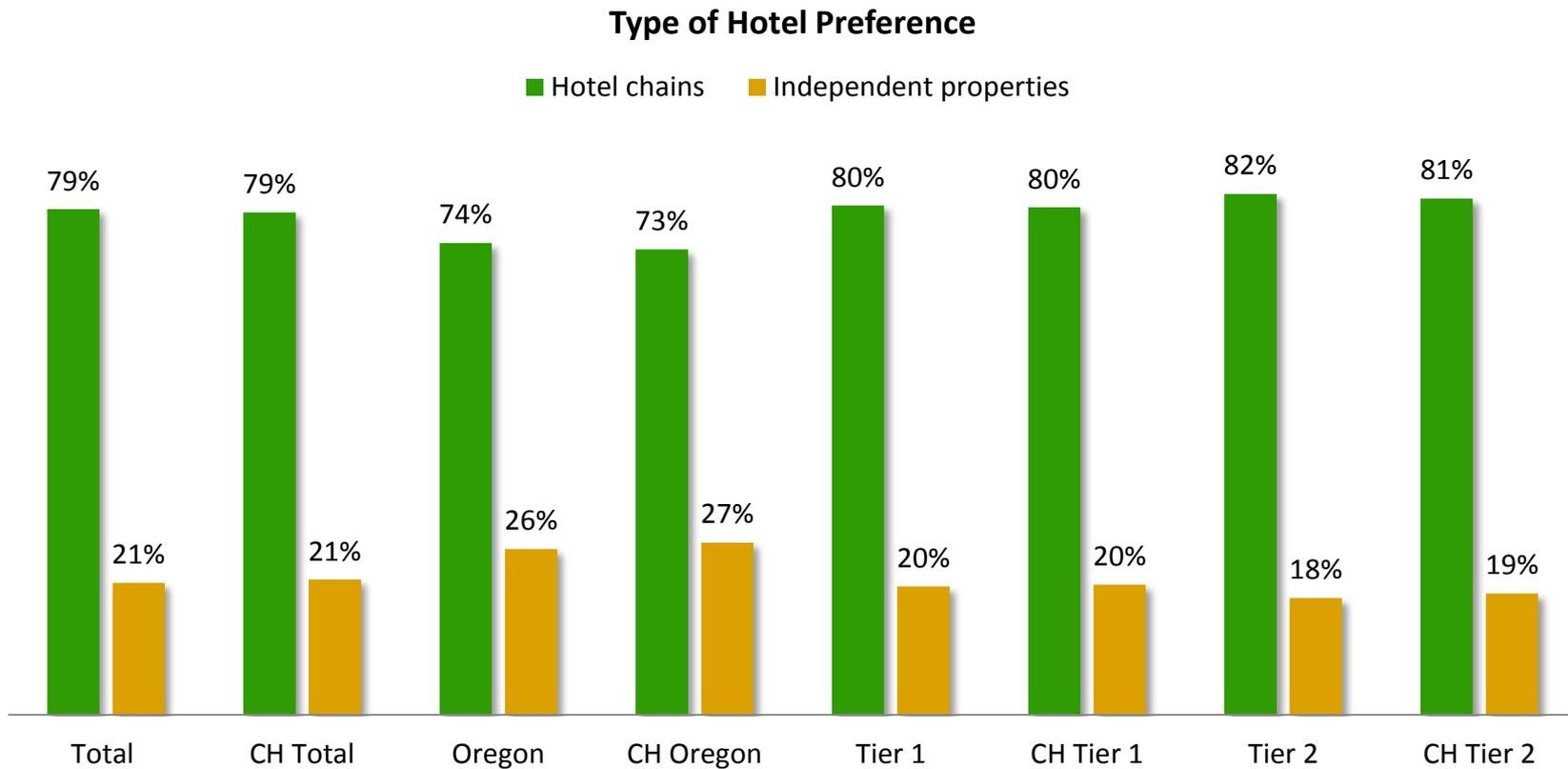
### The Property is Historic



Type of Accommodations	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Sample Size	1890	1572	331	274	1266	1051	293	247
Hotel/ Motel/ Resort	61%	63%	55%	58%	61%	63%	68%	67%
Stay with family/friend	33%	31%	37%	33%	33%	32%	27%	26%
Recreational Vehicle Camper Tent	9%	9%	12%	13%	8%	8%	9%	10%
Bed and Breakfast	7%	8%	5%	6%	7%	8%	12%	14%
Rental condominium, town home, or house	7%	7%	7%	7%	6%	7%	9%	9%
Owned home condominium, town home or apartment	5%	5%	3%	3%	5%	5%	7%	8%
Timeshare	5%	5%	4%	4%	5%	5%	7%	8%
Took a cruise	5%	5%	4%	4%	4%	5%	8%	9%
Other please specify	1%	2%	2%	2%	1%	2%	1%	1%

Q14: How many overnights did you stay while on this trip If your trip was just a day trip  
 Q15: And at which of the following accommodations did you stay during this most recent trip  
 Please select all that apply  
 Q16: You indicated that you stayed in a hotel motel or resort Was the building you stayed in a historical property n=1154

# Fewer Oregonians Choose Hotel Chains Than Those From Other Geographic Areas

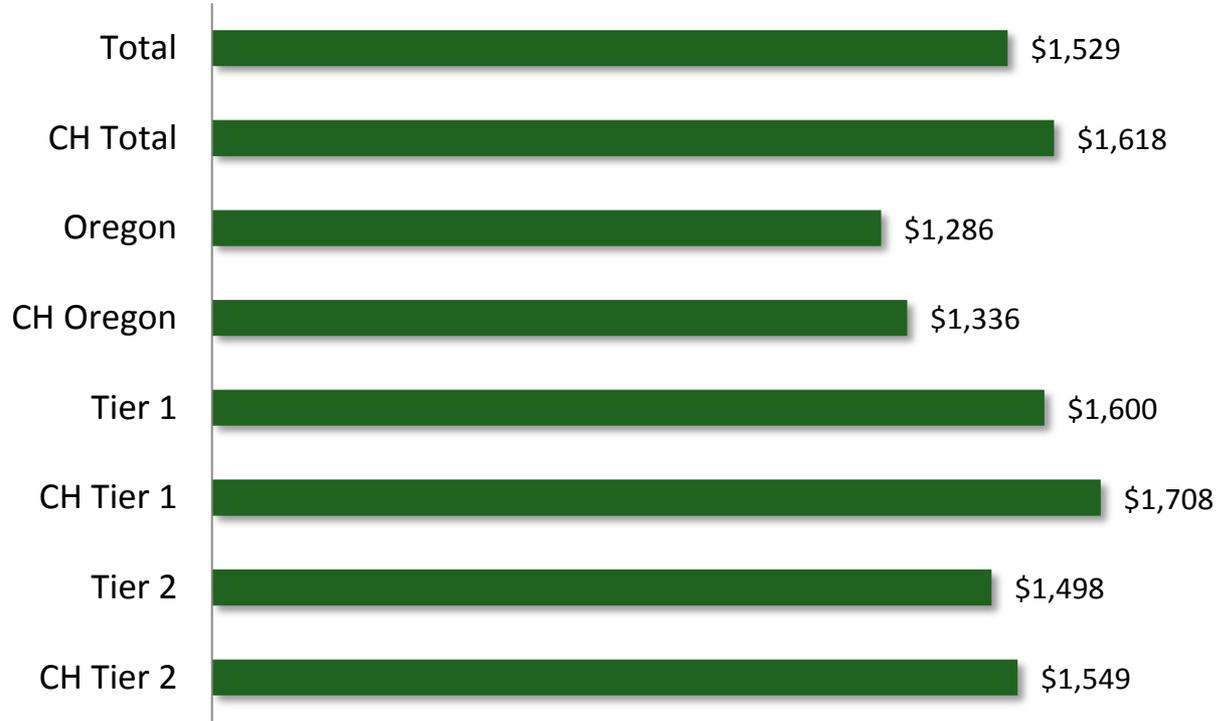


# Spending

# Travelers From Oregon Spend Less Overall Than Feeder Markets Due in Part to Lower Transportation Costs

Tier 1 Travelers Spend Approximately \$100 More Per Trip Than do Tier 2 Travelers

### Total Spend Key Markets

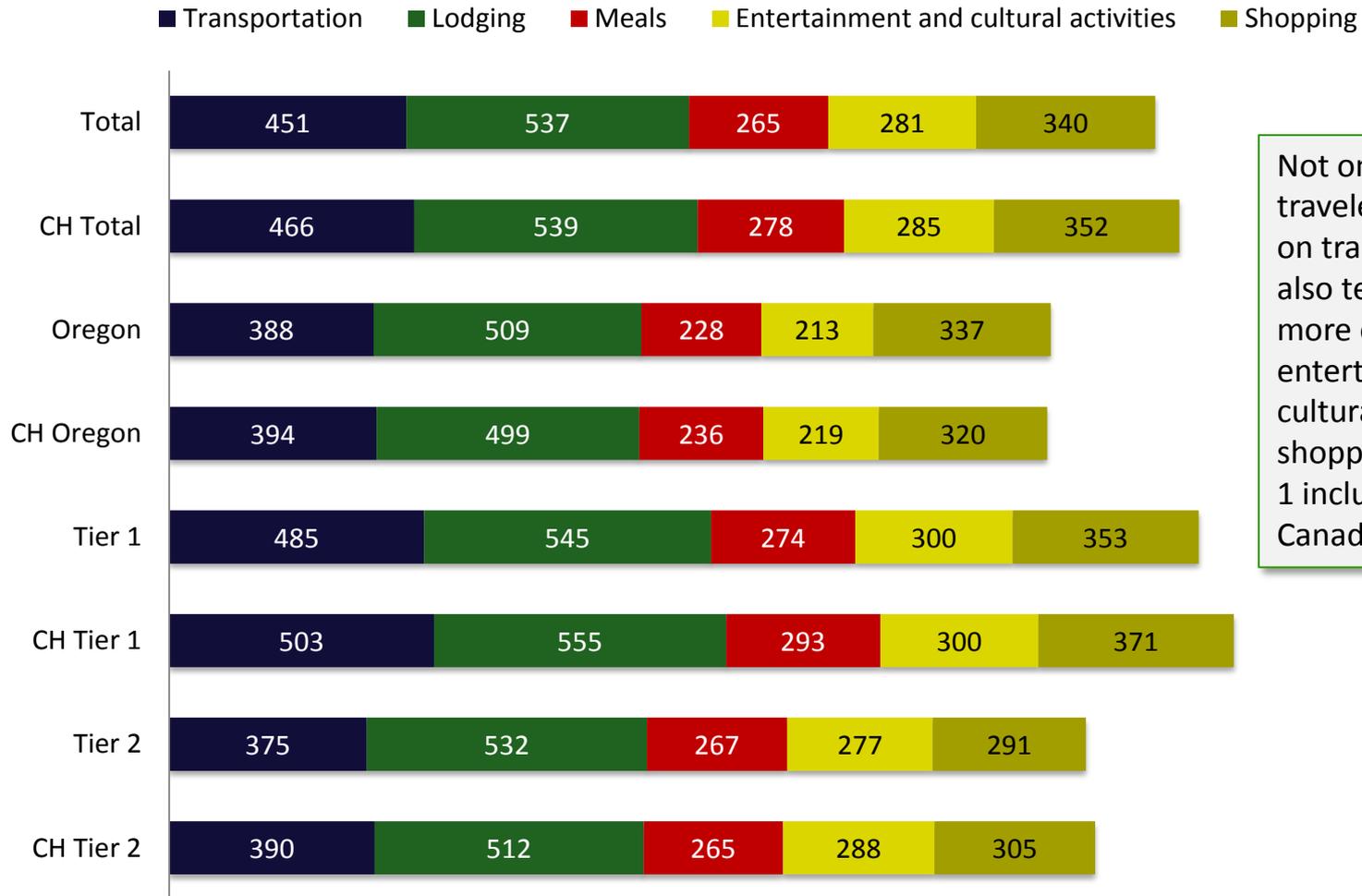


Considering Tier 1 includes Canadian provinces, there is not a big difference between Tier 1 and the overall population in terms of their spending habits

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.

# CH Tier One Respondents Spend Over \$100 More On Transportation Than Do Tier Two Respondents

## Other Segment Spending

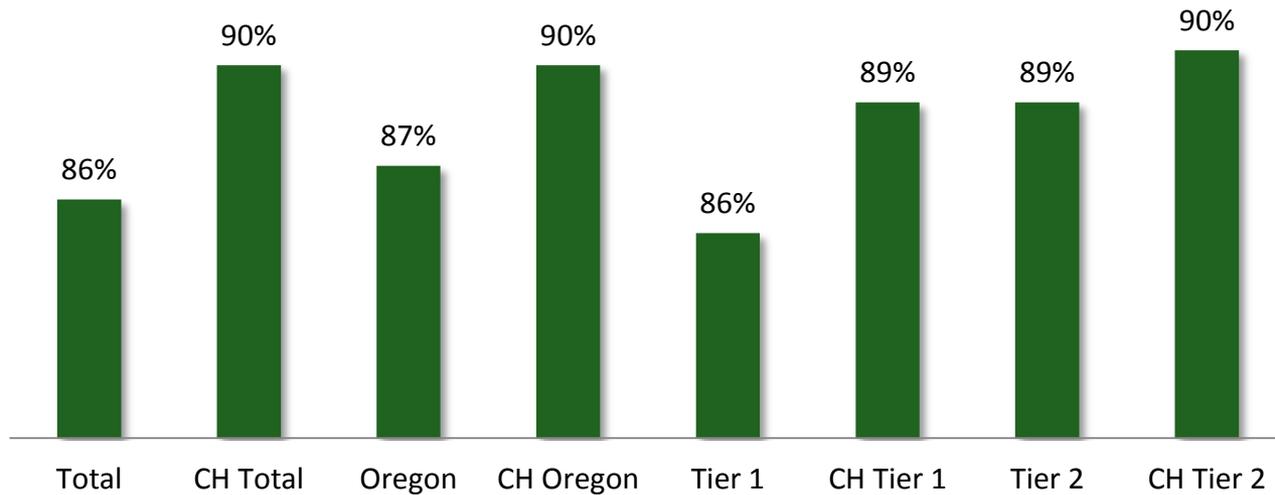


Not only do Tier 1 travelers spend more on transport, they also tend to spend more on entertainment, cultural activities and shopping. Note, Tier 1 includes two Canadian provinces.

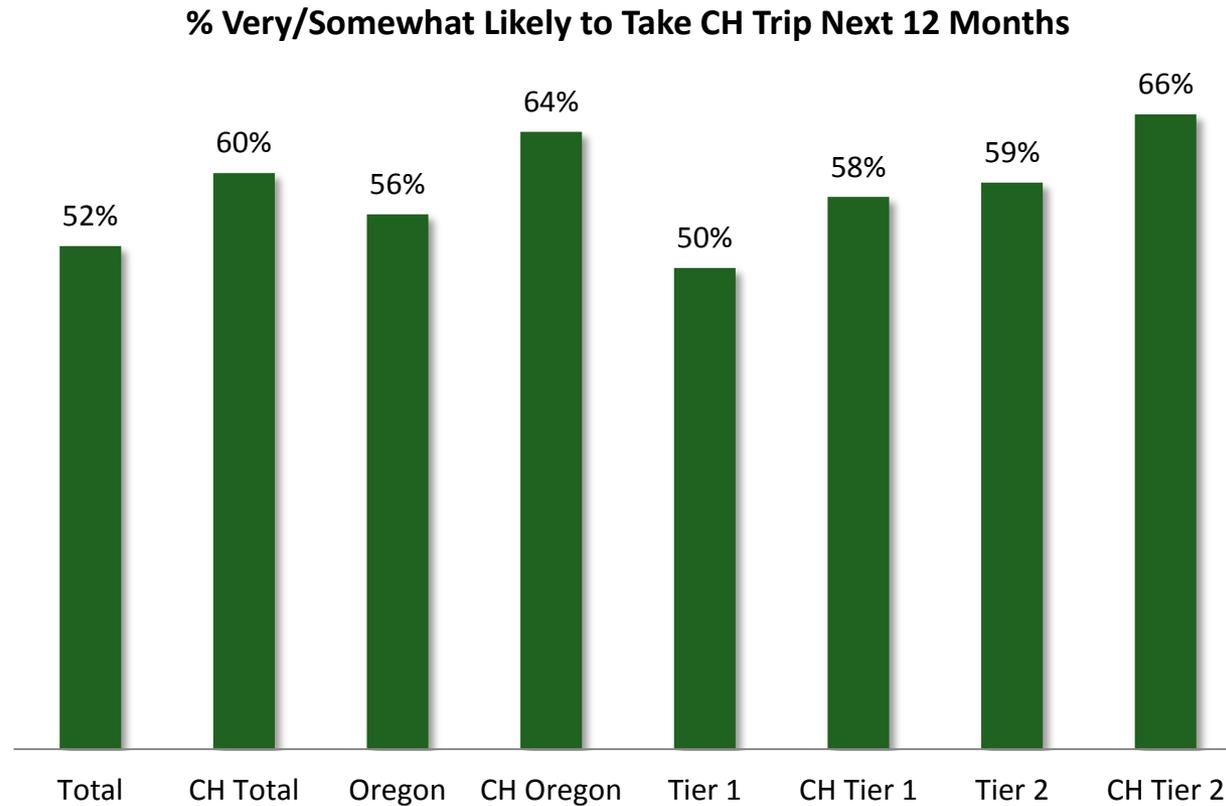
# Future Travel

# The Vast Majority of Travelers Are Likely to Take a Leisure Trip in the Next 12 Months

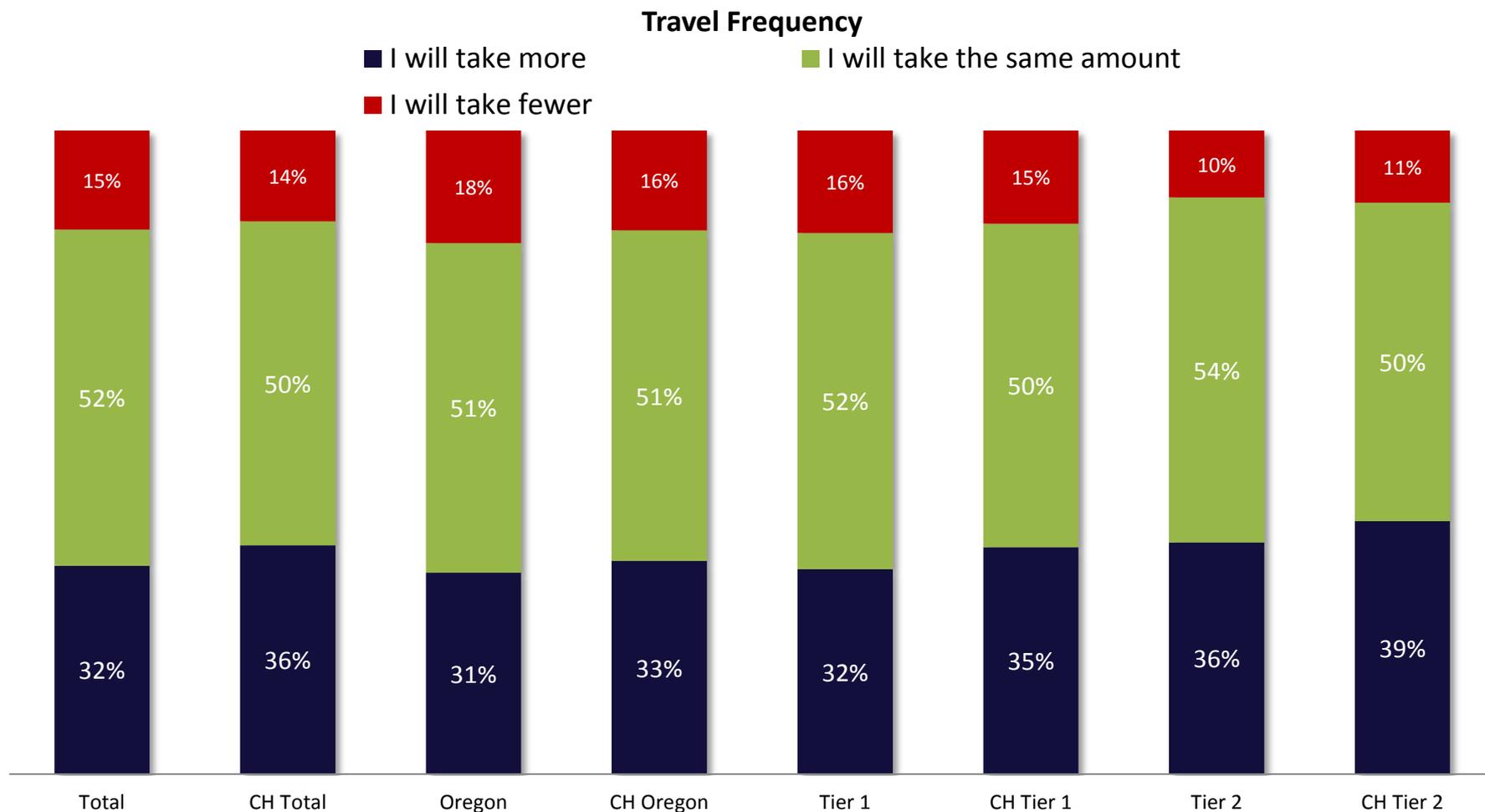
**% Very/Somewhat Likely to Take A Leisure Trip Next 12 Months**



# Tier 2 Cultural and Heritage Travelers Are Also Most Likely to Take a Cultural and Heritage Trip In the Near Future



# Tier 2 Cultural and Heritage Travelers Will Take Slightly More Leisure Trips in the Next 12 Months Than Other Travelers



Q25. Thinking about your past travel in a typical year, would you say you will take more leisure trips, the same amount of trips or fewer leisure trips in the next 12 months?

# The Current Economics Have Hit All Travelers Particularly Hard

Oregon travelers are least likely to say they are too busy to take a leisure trip

Internet Sites Visited	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Sample Size	247	159	42	26	177	112	27	21
Economic Recession	44%	43%	47%	42%	43%	43%	42%	48%
Too busy, can't get away from work	25%	28%	15%	20%	26%	30%	29%	27%
Health/medical issues	24%	25%	20%	28%	24%	24%	27%	29%
Too much hassle at airports	17%	20%	25%	25%	15%	19%	19%	18%
No one to travel with	15%	17%	20%	19%	14%	17%	12%	12%
Concern about personal job security	7%	9%	7%	3%	7%	10%	6%	8%
Personal safety/general safety concerns	5%	8%	3%	4%	6%	9%	4%	2%
Fear of terrorism	5%	6%	3%	4%	5%	6%	7%	9%
Don't have any interest in travel	10%	8%	12%	0%	10%	10%	10%	9%
Other please specify	15%	14%	10%	16%	17%	15%	9%	4%

# Information Sources

# Facebook Still Reigns as Number 1 and Newcomer Pinterest Has Captured 15% of the Total Leisure Traveler Market

Internet Sites Visited	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
<b>Sample Size</b>	1998	1661	350	292	1348	1115	300	254
Facebook.com	66%	68%	65%	66%	68%	70%	59%	61%
Google.com	64%	67%	66%	70%	65%	67%	57%	60%
Amazon.com	52%	54%	59%	64%	49%	50%	56%	57%
Youtube.com	50%	54%	48%	52%	51%	54%	51%	54%
Yahoo.com	45%	47%	49%	51%	44%	45%	47%	50%
Ebay.com	35%	36%	37%	40%	35%	35%	35%	36%
Mapquest.com	30%	31%	37%	36%	27%	28%	35%	36%
MSN.com	26%	28%	26%	28%	26%	29%	26%	26%
Expedia.com	23%	26%	20%	22%	24%	27%	22%	24%
Google+	22%	26%	19%	22%	24%	27%	20%	23%
Travelocity.com	21%	24%	20%	22%	21%	24%	24%	25%
Twitter.com	17%	19%	14%	16%	18%	20%	20%	22%
ESPN.com	17%	19%	17%	19%	16%	18%	23%	25%
Bing.com	17%	18%	22%	21%	15%	16%	18%	20%
TripAdvisor.com	17%	19%	15%	18%	17%	19%	18%	20%
CNN.com	17%	19%	13%	16%	17%	18%	20%	23%
Pinterest.com	15%	17%	16%	18%	16%	18%	9%	10%
Orbitz.com	15%	17%	16%	18%	13%	15%	20%	22%
Priceline.com	14%	15%	15%	17%	12%	13%	18%	19%
Hotwire.com	13%	14%	14%	16%	12%	14%	13%	14%
Huffingtonpost.com	12%	13%	13%	16%	10%	11%	16%	19%
Linkedin.com	12%	13%	10%	10%	12%	13%	15%	16%
Kayak.com	11%	12%	11%	11%	11%	12%	13%	13%
National Geographic	9%	11%	10%	12%	9%	10%	10%	12%
Yelp.com	9%	10%	7%	7%	8%	9%	15%	17%
Other please specify	4%	4%	7%	6%	4%	3%	3%	2%

Q33. Which, if any, of the following internet sites do you regularly visit?



# Facebook Still Dominates the Social Media Space but Others, Including YouTube and Twitter, Have Become Much More Popular Since 2009

In the last 3 years, Facebook has become the dominant social media site. In 2009 it was Google.

Social Networking Sites	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Sample Size	1998	1661	350	292	1348	1115	300	254
Facebook.com	77%	79%	73%	74%	79%	81%	73%	75%
YouTube.com	43%	47%	36%	39%	44%	48%	45%	48%
Twitter.com	19%	21%	17%	17%	19%	21%	23%	26%
Google.com	18%	20%	16%	18%	18%	20%	20%	22%
Pinterest.com	13%	15%	13%	15%	14%	16%	8%	9%
LinkedIn.com	12%	13%	11%	11%	12%	13%	15%	16%
Yelp.com	6%	7%	4%	4%	6%	6%	10%	11%
Instagram.com	6%	7%	3%	3%	6%	7%	7%	8%
Flickr	5%	5%	4%	4%	5%	5%	7%	8%
FourSquare	3%	4%	2%	2%	3%	3%	7%	8%
Vimeo	3%	3%	2%	2%	3%	3%	4%	5%
Other please specify	9%	7%	14%	13%	9%	6%	8%	7%

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

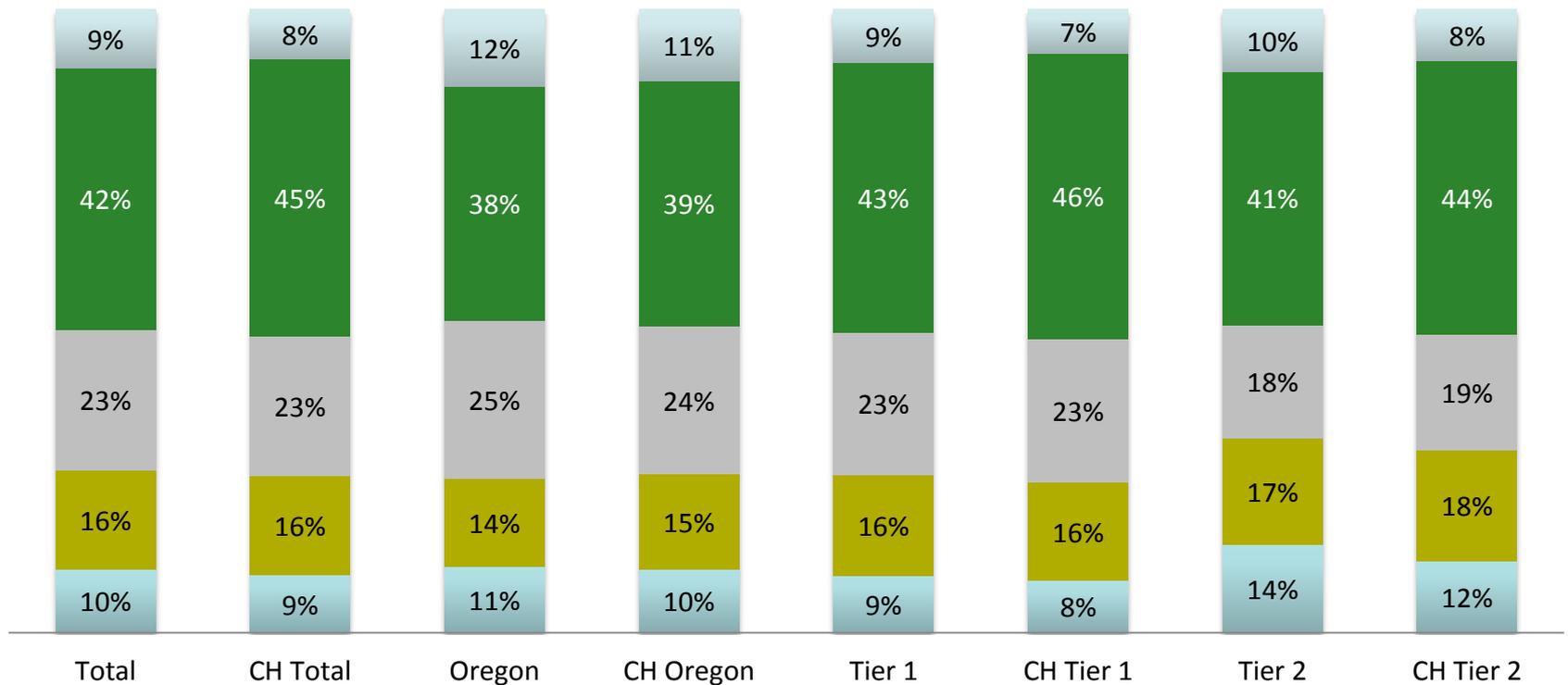


# The Majority of Respondents Have Been Using Social Media for More Than Three Years

In 2009, usage of social media was about 65% among respondents.

### Use of Social Media Sites

- Less than 1 year
- More than a year but less than 2 years
- 2 to 3 years
- More than 3 years
- Dont Know/Rather not say



# Publications Read

# As Found in Our Other Studies, Community Newspapers Are Most Commonly Read Publication Among Travelers

Approximately one-third of travelers in all these regions read travel related magazines

Types of Publications	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Sample Size	1998	1661	350	292	1348	1115	300	254
Community newspaper	44%	46%	51%	53%	43%	44%	42%	42%
Entertainment magazines	35%	38%	31%	34%	35%	38%	38%	40%
News magazines	34%	38%	33%	36%	34%	37%	39%	41%
Travel related magazines	33%	37%	34%	38%	32%	36%	37%	40%
Hobby related magazines	30%	32%	31%	34%	31%	33%	23%	24%
General interest, city life or regional magazines	28%	32%	33%	36%	28%	32%	27%	29%
Food/Wine related magazines	27%	30%	26%	29%	27%	31%	30%	30%
Fashion/homemaking magazines	27%	29%	25%	27%	28%	30%	24%	26%
National newspaper	26%	29%	26%	29%	26%	29%	28%	30%
Sports related magazines	25%	27%	21%	24%	24%	26%	29%	31%
History related magazines	20%	23%	23%	26%	19%	22%	21%	23%
Financial magazines	16%	17%	13%	12%	16%	17%	22%	23%
Cultural related magazines	15%	18%	14%	16%	15%	17%	18%	21%
Other please specify	9%	8%	12%	10%	10%	8%	5%	4%

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

# Of Those Who Read Travel Publications, National Geographic and Travel + Leisure Are Most Widely Read

Travel Publications	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Sample Size	658	614	120	112	428	400	111	102
National Geographic	47%	49%	52%	56%	44%	47%	49%	51%
Travel + Leisure	46%	46%	49%	53%	44%	44%	50%	49%
AAA Magazines	40%	40%	31%	31%	39%	39%	53%	53%
National Geographical Traveler	30%	31%	22%	24%	31%	32%	34%	34%
Sunset	29%	29%	30%	32%	29%	29%	26%	24%
Vacations	26%	26%	14%	15%	28%	29%	30%	30%
Coastal Living	23%	24%	28%	30%	22%	23%	24%	23%
Oregon Coast Magazine	21%	22%	49%	51%	16%	17%	8%	9%
Condé Nast Traveler	17%	16%	18%	19%	15%	15%	23%	21%
Northwest Travel Magazine	16%	17%	25%	27%	16%	16%	7%	8%
Outside	13%	14%	11%	12%	13%	14%	16%	17%
Travel 50 & Beyond	12%	13%	8%	9%	12%	13%	17%	17%
Portland Monthly Magazine	10%	10%	24%	26%	6%	6%	7%	7%
None of the above	5%	4%	2%	1%	6%	5%	3%	4%
Other please specify	4%	3%	6%	3%	3%	3%	4%	4%

Q32a. Which of the following types of travel publications do you typically read, either in print or online?



# About Half of All Travelers Surveyed Read the Top Two Publications in this Category

CH Tier 2 reads Food & Wine Magazines typically more than those from other regions

Food and Wine Publications	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Sample Size	542	503	92	86	359	340	91	77
Food & Wine	46%	47%	43%	42%	44%	45%	55%	57%
Bon Appétit	45%	46%	42%	41%	46%	47%	47%	49%
Better Homes and Gardens	44%	45%	41%	43%	47%	47%	38%	37%
Food Network Magazine	39%	40%	44%	43%	39%	40%	36%	36%
Cooking Light	32%	33%	29%	31%	32%	33%	35%	37%
Gourmet	31%	32%	30%	31%	30%	32%	32%	35%
Family Circle	29%	30%	27%	29%	29%	30%	34%	35%
Cooks Illustrated	25%	26%	20%	19%	27%	28%	20%	24%
Wine Spectator	19%	20%	16%	17%	21%	21%	17%	17%
Sunset Pacific NW edition	18%	18%	36%	38%	16%	16%	9%	9%
Vegetarian Times	13%	14%	16%	17%	13%	13%	13%	14%
The Wine Advocate	13%	13%	15%	16%	12%	12%	14%	15%
Saveur	11%	12%	7%	8%	11%	11%	18%	20%
All About Beer	11%	12%	12%	13%	10%	11%	13%	14%
Northwest Palate	10%	10%	17%	18%	8%	8%	10%	12%
Midwest Living	10%	10%	8%	9%	10%	10%	11%	13%
Intermezzo Magazine	5%	6%	3%	3%	6%	6%	6%	7%
None of the above	5%	5%	6%	6%	6%	5%	4%	3%
Other	6%	6%	4%	2%	7%	7%	2%	2%

# While Smithsonian Ranks at the Top, There are a Number of History Publications Read by Oregon's Target Audiences

History Publications	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Sample Size	402	381	79	75	260	246	62	59
Smithsonian	51%	53%	59%	61%	49%	50%	52%	53%
American History	45%	46%	39%	40%	45%	46%	51%	53%
History Channel Magazine	44%	44%	42%	43%	42%	42%	51%	54%
Natural History	40%	40%	34%	34%	42%	42%	40%	41%
Military History	32%	33%	28%	30%	33%	33%	36%	37%
World War II	32%	32%	22%	23%	34%	34%	36%	36%
Civil War Times	24%	25%	16%	16%	25%	26%	29%	30%
Good Old Days	20%	20%	15%	15%	22%	21%	20%	20%
Reminisce	17%	18%	14%	14%	17%	17%	24%	24%
Preservation Magazine	16%	17%	19%	20%	13%	14%	24%	25%
Realm	11%	12%	5%	5%	12%	12%	18%	19%
Armchair General	10%	10%	4%	4%	10%	11%	17%	16%
None of the above	14%	14%	15%	14%	15%	14%	12%	10%
Other	4%	4%	2%	2%	6%	6%	0%	0%

Q32c. Which of the following types of history publications do you typically read, either in print or online?



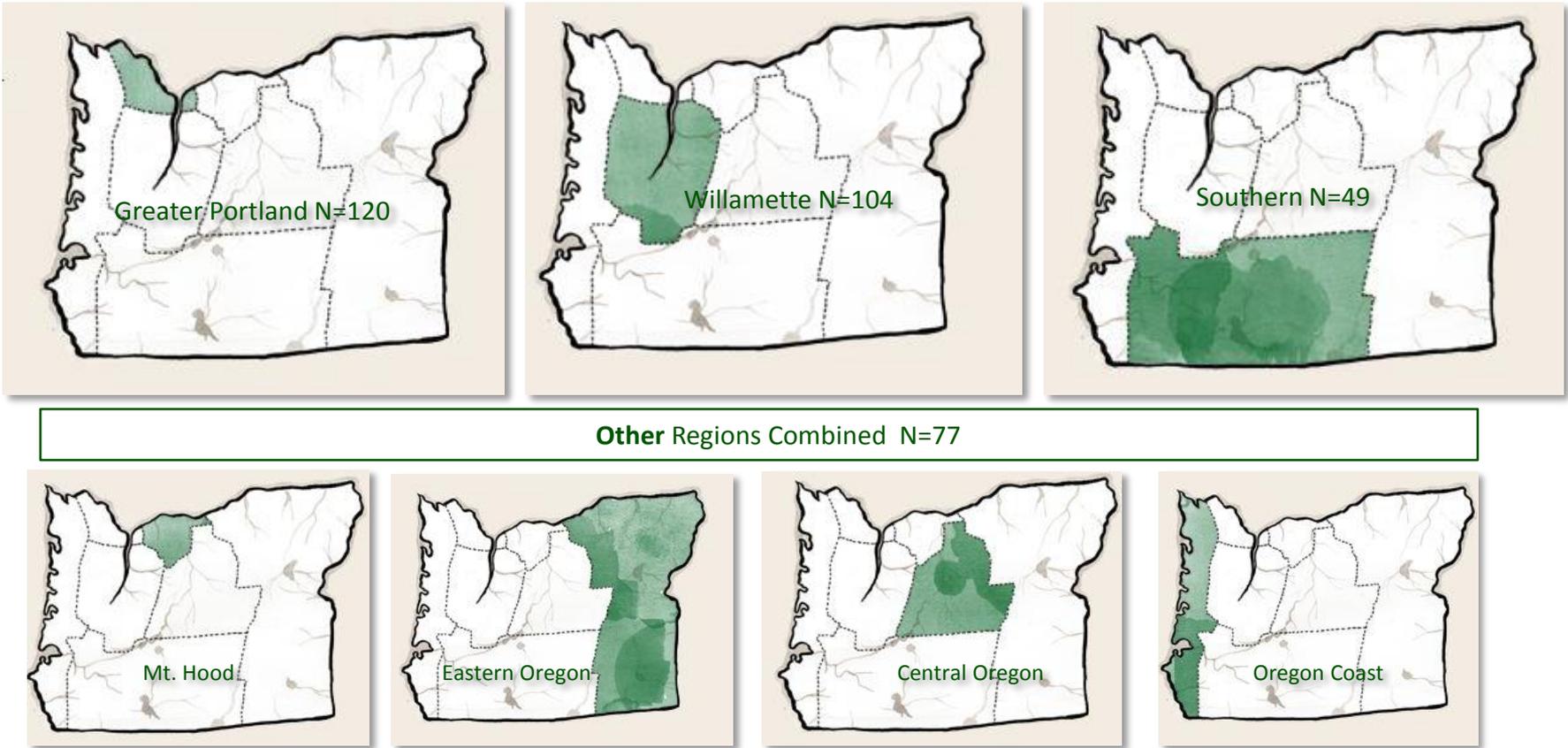
# National Geographic Tops the List of Cultural Publications Across All Regions

Oregonians are more likely to read Pacific Northwest publications

Cultural Publications	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Sample Size	302	292	49	47	200	192	53	53
National Geographic	74%	75%	69%	69%	75%	76%	74%	74%
Rolling Stone	46%	45%	47%	47%	44%	44%	50%	50%
Smithsonian	44%	44%	58%	57%	40%	40%	47%	47%
The New Yorker	40%	41%	36%	37%	37%	39%	53%	53%
History Channel Magazine	40%	41%	44%	44%	38%	39%	46%	46%
Sunset Magazine (Pacific Northwest Edition)	38%	38%	51%	53%	39%	39%	22%	22%
Gourmet Magazine	36%	36%	37%	39%	35%	36%	36%	36%
Southern Living	30%	30%	26%	27%	28%	29%	40%	40%
Oregon Coast Magazine	26%	27%	58%	60%	20%	21%	19%	19%
Art in America	25%	26%	22%	23%	23%	24%	32%	32%
Billboard	23%	24%	18%	18%	23%	24%	27%	27%
None of the above	6%	6%	7%	8%	6%	6%	3%	3%
Other please specify	3%	3%	7%	8%	2%	3%	3%	3%

# Cultural and Heritage Travelers Study Oregon Regions

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



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.



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 other 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%.

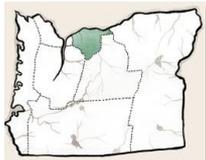
While all Oregonians travel most often to California on out of state trips, the differences among the regions is worthy of note. For southern residents 45%, for Portlanders 23%, Willamette Valley 28% and for those in the other regions, 18%.

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.

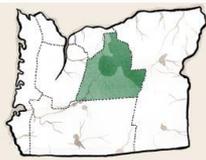
# Featuring All Other Regions – Trip Characteristics



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.



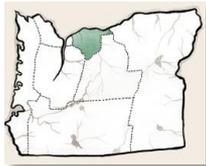
While there is no difference between this group and the Oregon sample in terms of leisure trips taken, they do differ when it comes to business travel. On average, they take more business trips than those in other regions, 2.4 versus 2.1 for the total. Further, they take trips that combine business with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

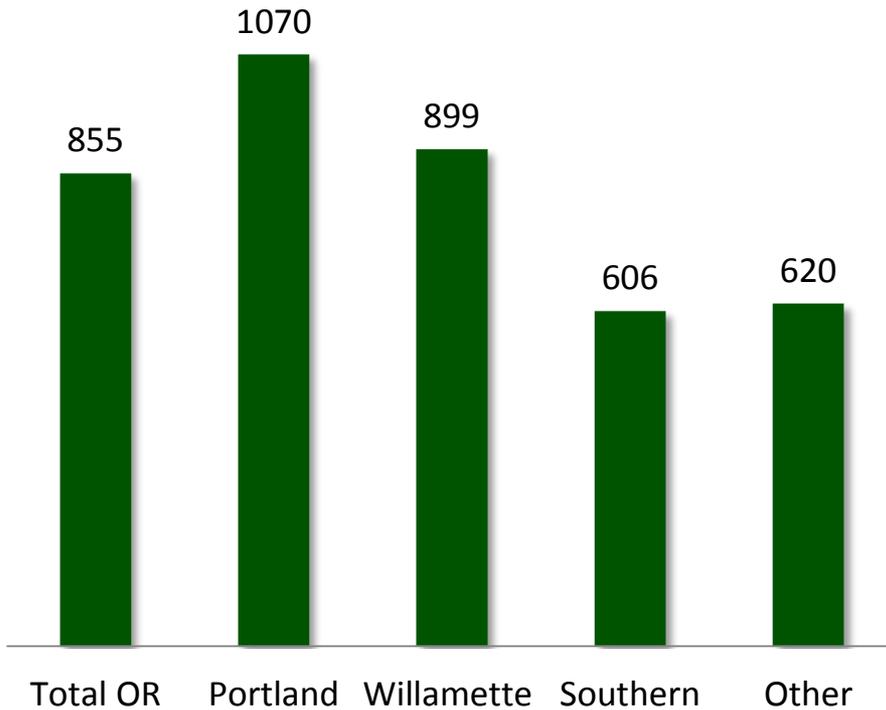


Importantly, this group are most likely to say that the description of cultural heritage travelers defines them very well (30% said this compared to 24% of the overall Oregon sample, a further 74% said it described them somewhat well, compared to 68% for Oregonians).

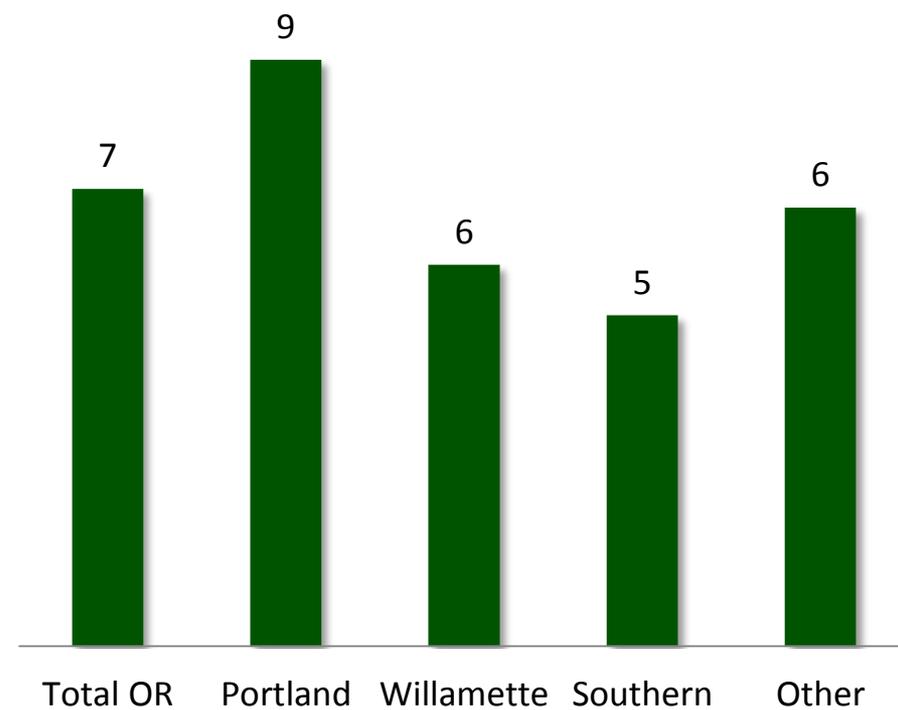
Nearly four in ten of these travelers read travel related magazines, and this is slightly higher than other regions. They are far more likely than their neighbors to read Northwest Travel Magazine (37% versus around a quarter of Oregon residents overall except those in the south, in that region the readership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

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

## Miles Traveled



## Number of Overnights



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".

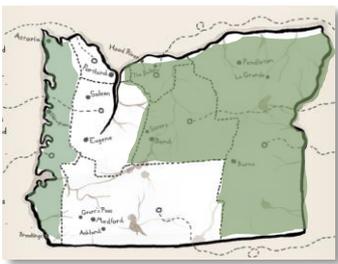
# Differentiators in Activities Participated in on Most Recent Trip



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, candies, 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



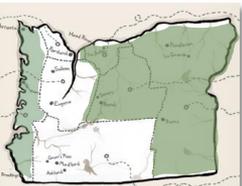
There are fewer differences between Portlanders and other Oregonians in terms of activities done in the last three years. They shopped for general merchandise less but visited local farmers markets and shopped for crafts more. They are most likely to enjoy a fine dining experience, shop for gourmet food 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.

# 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, manicure)	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

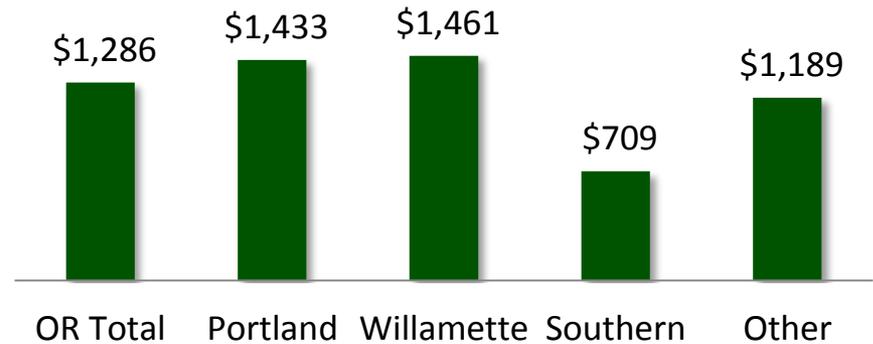
Consider this a CH Activity (Sorted by OR TOTAL)	OR Total	Portland	Willamette	Southern	Other
Sample Size	350	120	104	49	77
Visited heritage buildings/historical buildings	53%	46%	52%	58%	63%
Attended cultural and/or heritage fair or festival	50%	52%	51%	49%	46%
Attended historical re-enactments	48%	47%	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 craftspeople	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.

**Total Spent**



**Spending Breakdown**

■ Transportation ■ Lodging ■ Meals ■ Entertainment & Cultural Events ■ Shopping



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	OR Total	Portland	Willamette	Southern	Other
Sample Size	350	120	104	49	77
I prefer taking trips that are a combination of a wide variety of activities such as culture shopping nature exercise	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	71%	75%	67%	67%	74%
I seek travel experiences where the destination its buildings and surroundings have retained their historic character	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	65%	68%	62%	61%	69%
I like to pursue a life of challenge novelty and change	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	55%	62%	57%	34%	54%
I am willing to pay more for travel experiences that do not harm the environment	53%	60%	47%	44%	56%
I spend more money on cultural and/or heritage activities while I am on a trip	45%	43%	51%	44%	42%
I would pay more for lodging that reflects the cultural and/or heritage destination I am visiting	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	30%	34%	27%	24%	31%

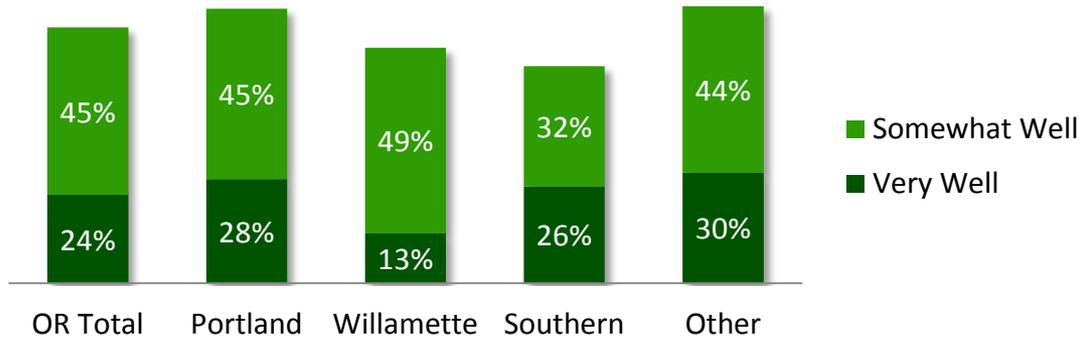
[BEHAVIORS] Please indicate how strongly you agree with each of the following as they apply to your leisure travel.

# 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%

# 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

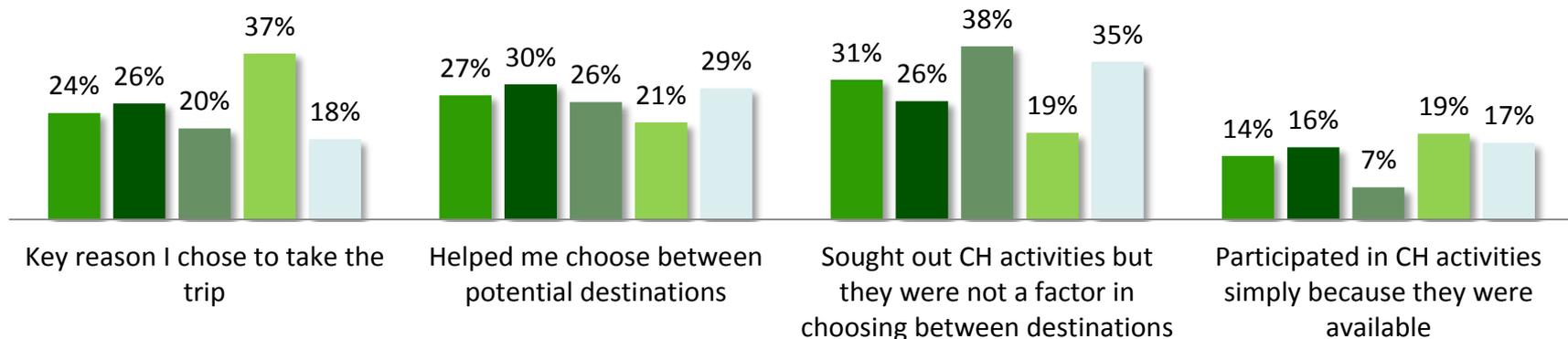


Conversely, those who reside in the four combined regions are most likely to identify with the term CH traveler but least likely to choose their destination based on the availability of CH activities and attractions but once at their destination, they seek these out.

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

Legend: Total OR (Dark Green), Portland (Medium Green), Willamette (Light Green), Southern (Very Light Green), Other (Lightest Green)

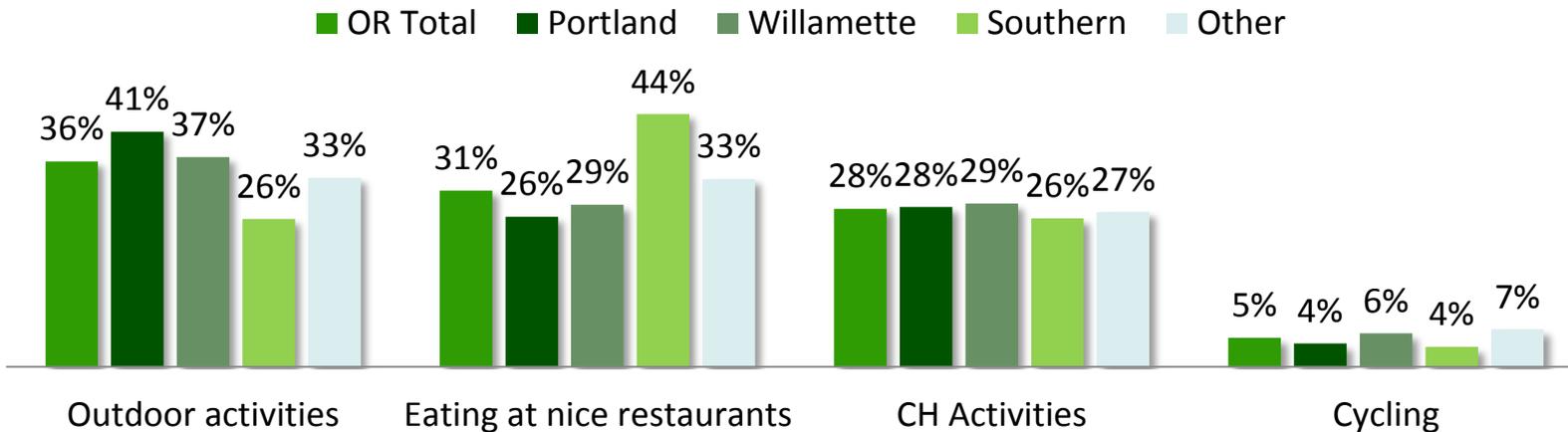


Now, thinking about all the trips you have taken over the *past three (3) years* in which you participated in cultural and/or heritage activities, which statement **best** describes you?

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

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

Representative Rank 1*	OR Total	Portland	Willamette	Southern	Other
Sample Size	350	120	104	49	77
Oregon's public beaches	33%	27%	41%	35%	29%
Crater Lake	29%	21%	34%	53%	21%
Mt Hood	24%	33%	18%	19%	20%
The Oregon Trail	17%	16%	15%	21%	18%
Columbia River Gorge	16%	15%	14%	12%	23%
Multnomah Falls	14%	18%	14%	5%	14%
Portland Rose Festival	12%	18%	9%	7%	8%
Coastal Lighthouses	8%	6%	11%	10%	6%
Timberline Lodge	6%	10%	5%	2%	2%
Oregon Shakespeare Festival Ashland	5%	3%	4%	9%	9%
Oregon Wineries	5%	1%	8%	10%	4%
Oregon Microbreweries	5%	4%	6%	0%	9%
Hay Stack Rock at Cannon Beach	5%	11%	1%	3%	0%
Pendleton Roundup	4%	3%	2%	0%	11%
Oregon Caves	4%	4%	3%	13%	1%
Bandon Dunes Golf Courses	4%	1%	2%	1%	11%
Fort Clatsop Lewis and Clark expedition	3%	1%	5%	0%	6%
John Day Fossil Beds	2%	0%	2%	0%	5%
Covered Bridges	1%	1%	4%	0%	0%
Portland Art Museum	1%	2%	1%	1%	0%
Smith Rock Bend	1%	2%	1%	0%	1%
Painted Hills	1%	0%	1%	0%	2%
Windsurfing in Hood River	1%	2%	0%	0%	0%
Cycle Oregon	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*	OR Total	Portland	Willamette	Southern	Other
Sample Size	350	120	104	49	77
Oregon's public beaches	47%	45%	58%	41%	40%
Crater Lake	22%	18%	17%	54%	13%
Multnomah Falls	15%	19%	16%	8%	11%
Columbia River Gorge	14%	24%	8%	3%	16%
Coastal Lighthouses	13%	6%	20%	16%	12%
Mt Hood	12%	21%	6%	11%	9%
Oregon Wineries	11%	3%	13%	16%	19%
Oregon Microbreweries	8%	4%	14%	8%	5%
Hay Stack Rock at Cannon Beach	7%	12%	7%	3%	2%
Portland Rose Festival	7%	8%	6%	3%	7%
Oregon Shakespeare Festival Ashland	5%	5%	5%	4%	8%
The Oregon Trail	5%	6%	4%	3%	5%
Oregon Caves	4%	4%	2%	10%	4%
Bandon Dunes Golf Courses	4%	4%	1%	2%	10%
Portland Art Museum	4%	5%	3%	5%	2%
Painted Hills	3%	1%	2%	3%	9%
Covered Bridges	3%	2%	3%	2%	6%
Pendleton Roundup	3%	1%	3%	2%	6%
Timberline Lodge	3%	3%	4%	3%	0%
Fort Clatsop Lewis and Clark expedition	2%	3%	2%	0%	2%
Smith Rock Bend	2%	1%	3%	1%	3%
John Day Fossil Beds	2%	2%	0%	0%	6%
Cycle Oregon	1%	1%	2%	0%	3%
Windsurfing in Hood River	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