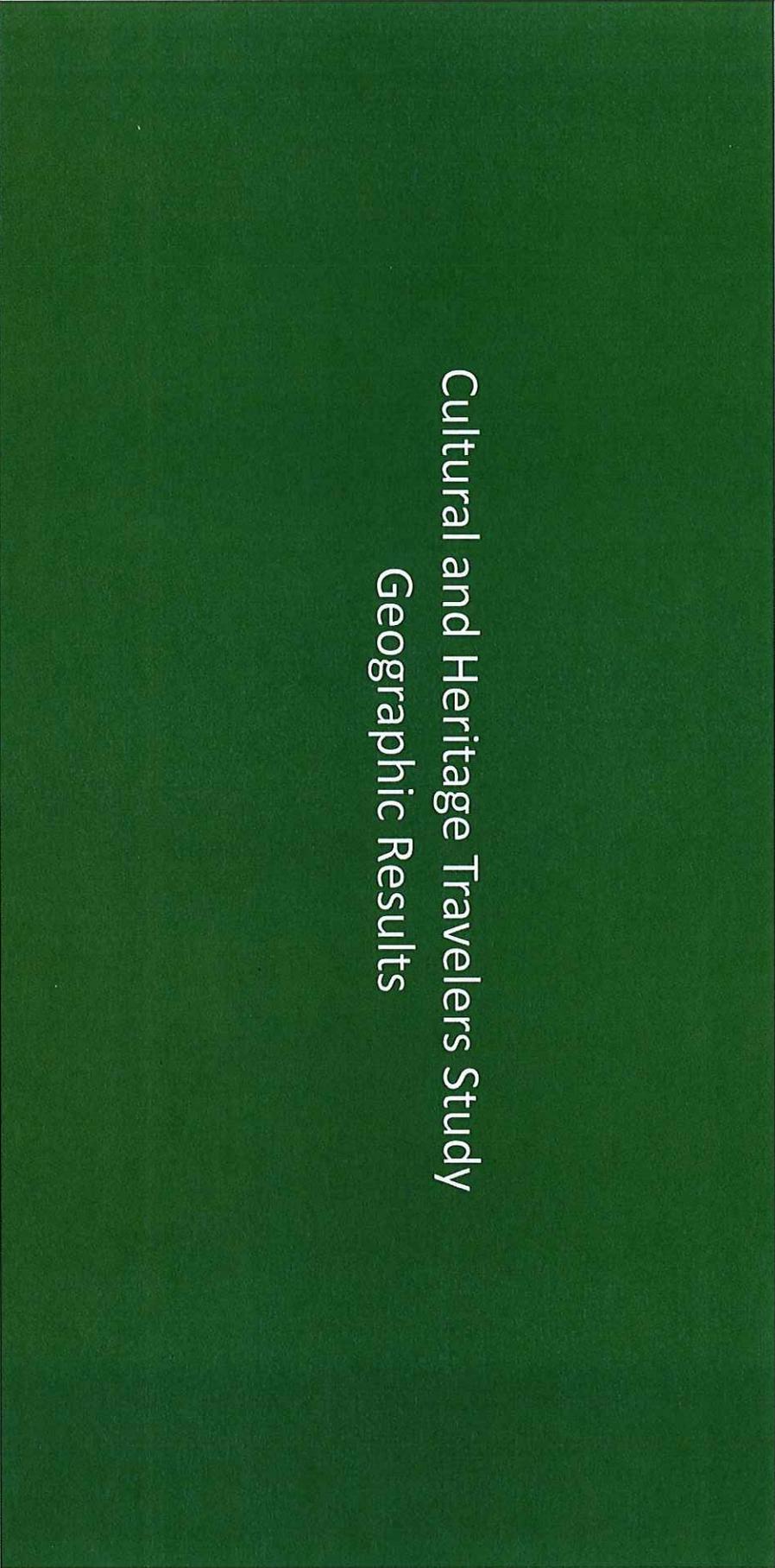




Cultural and Heritage Travelers Study  
Geographic Results





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# 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

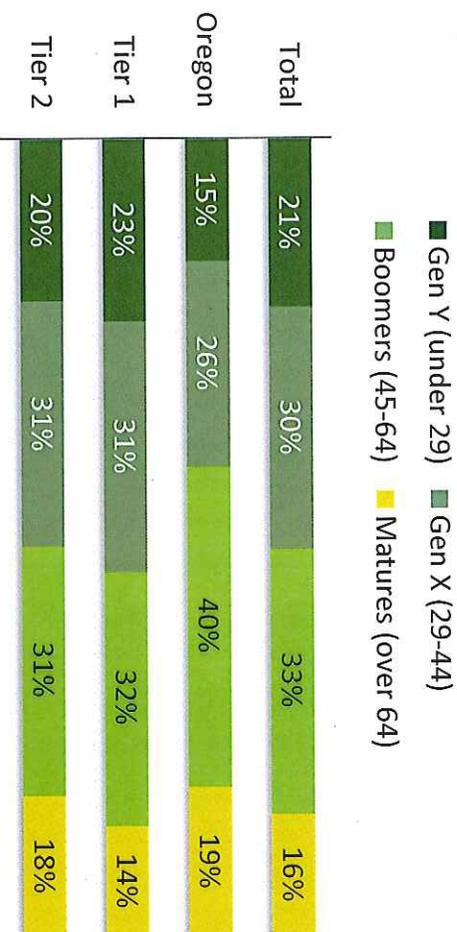
Residents of Oregon n=350



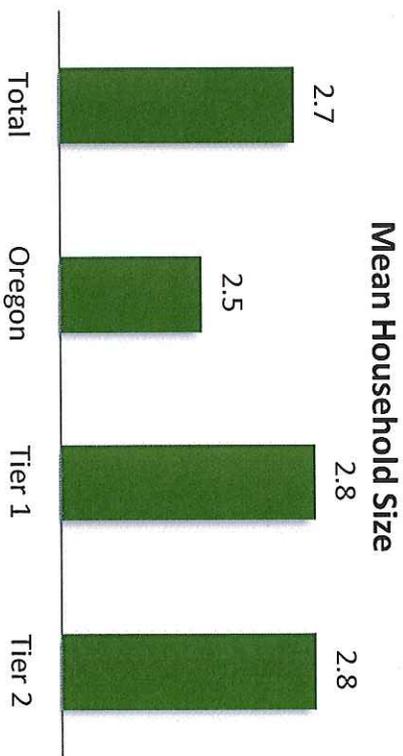
# Key Market Demographics

	Total	Oregon	Tier 1	Tier 2
Sample Size	2000	350	1350	300
Gender				
Male	49%	47%	48%	60%
Female	51%	53%	53%	41%
Race				
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%

## Age

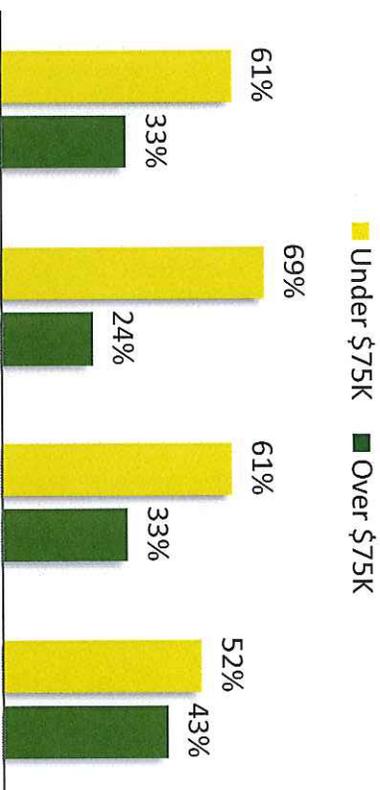


Q57b. What is your gender? Q59. Are you white, black, Asian, Native American or something else? Q58. What is your age?



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

## Household Income

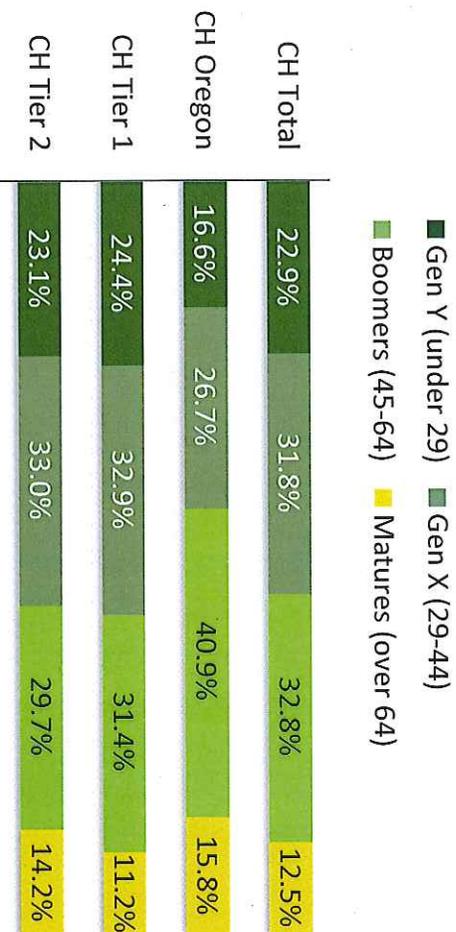


Q65. What was your TOTAL household income in 2011 before taxes?

# Key Market Demographics

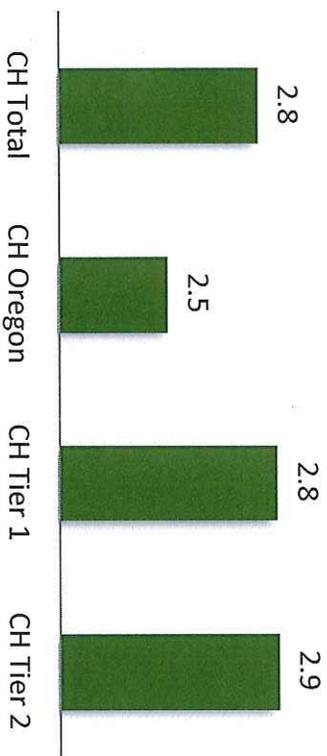
	CH Total	CH Oregon	CH Tier 1	CH Tier 2
Sample Size	1662	292	1116	254
Gender				
Male	49%	46%	47%	59%
Female	51%	54%	53%	41%
Race				
White/Caucasian	82%	91%	81%	76%
Black/African-American	3%	1%	3%	5%
Asian/Pacific Islander	11%	5%	12%	13%
Native American	3%	3%	3%	2%
Other	4%	2%	3%	6%

## Age



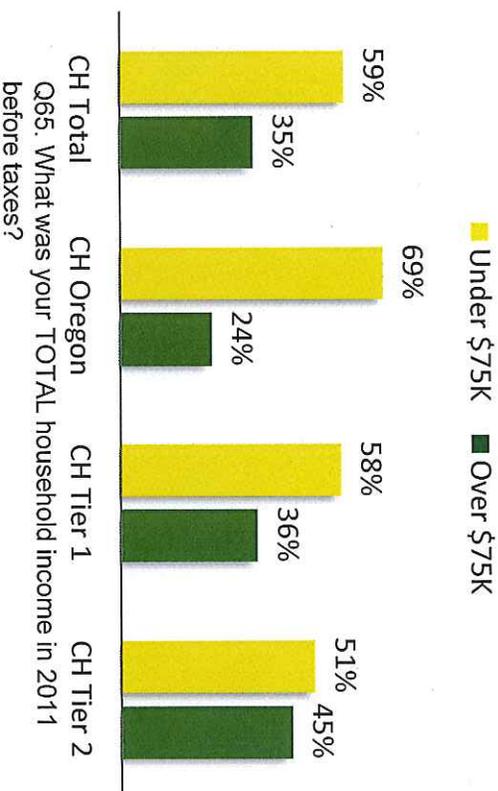
Q57b. What is your gender? Q59. Are you white, black, Asian, Native American or something else? Q58. What is your age?

## Mean Household Size



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

## Household Income

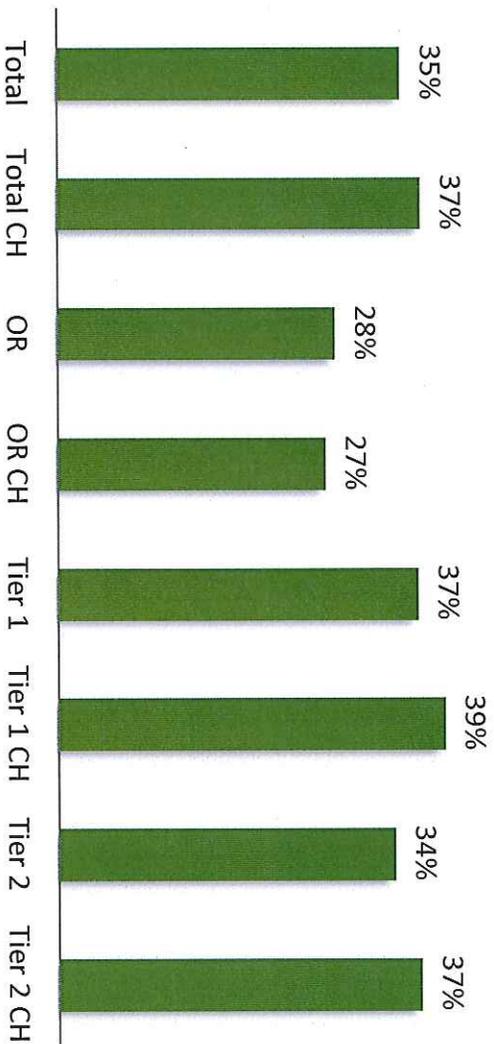


Q65. What was your TOTAL household income in 2011 before taxes?

# 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?



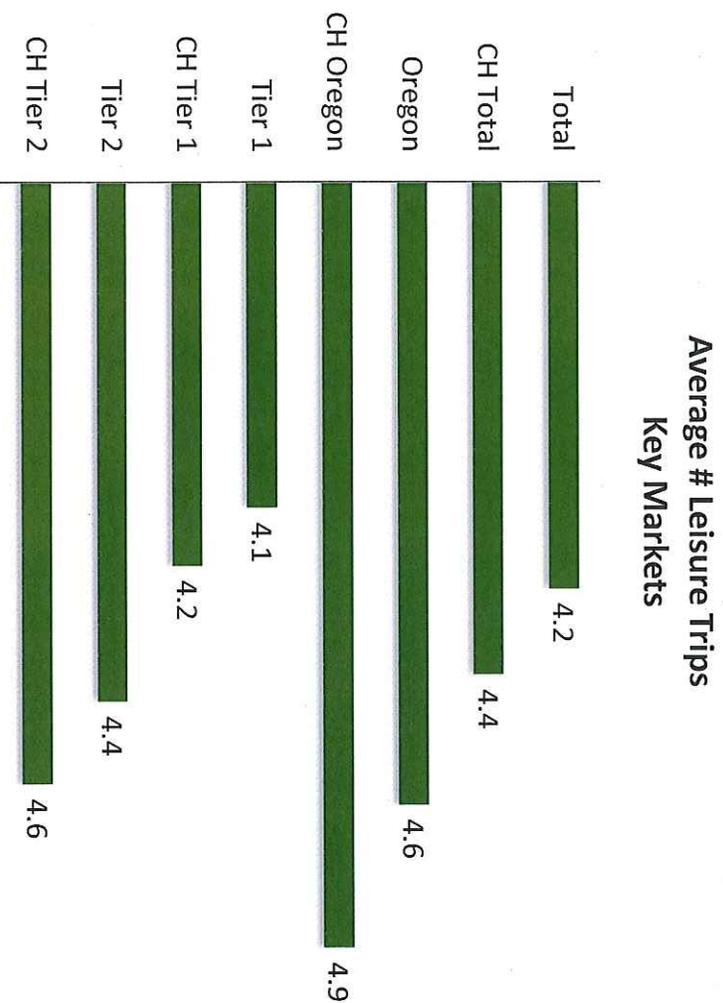
# Key Market Demographics

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

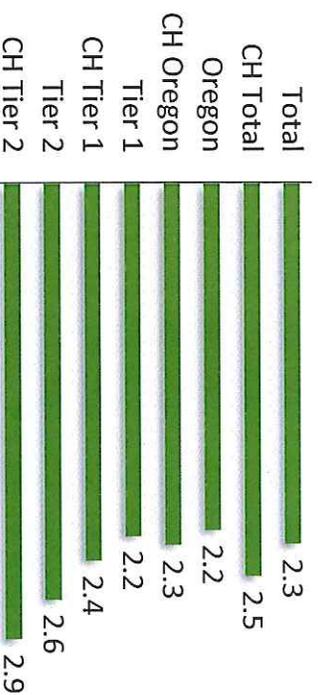


S1. Thinking of all the trips you have taken away from home of at least 50 miles one-way OR where you spent at least one overnight in the past 12 months, approximately how many of these trips were for each of the purposes listed below? Leisure (pleasure, vacation, or personal purposes) within the U.S.

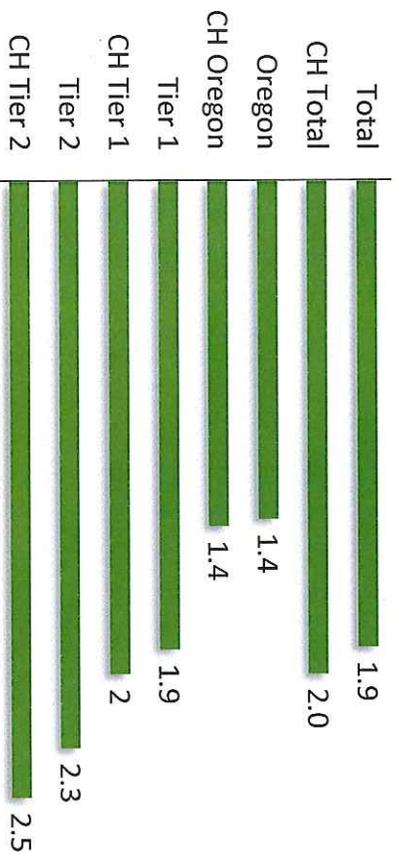


# Those From Tier 2 Most Often Combine Business and Leisure Trips and Take International Trips

Combined Leisure and Business Trips  
Key Markets



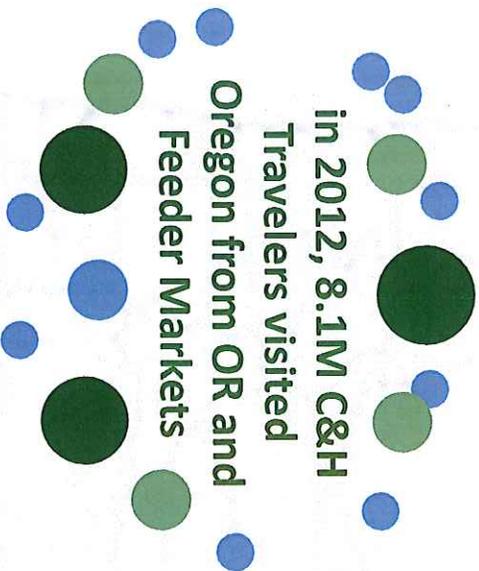
International Trips  
Key Markets



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



## Market Size

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



## Economic Impact

### KEY FINDINGS

- 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.
- 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.

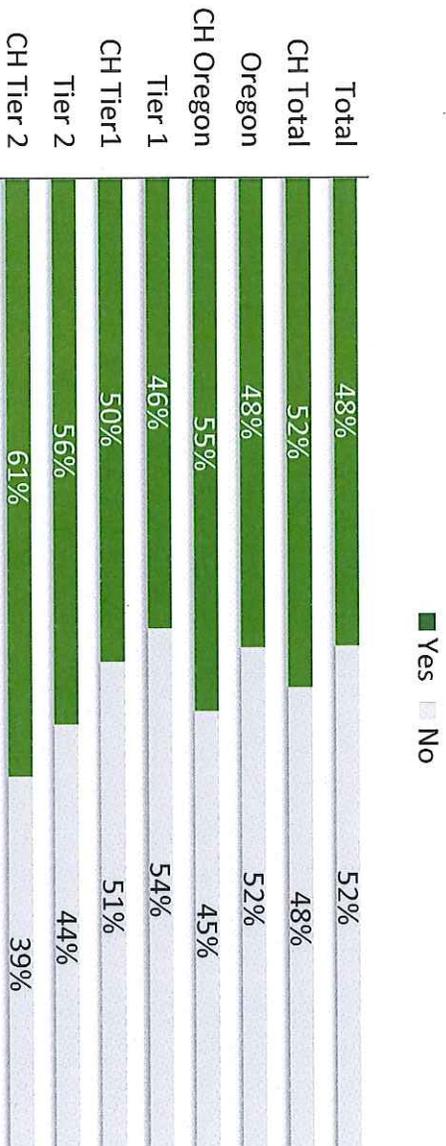


# Cultural And Heritage Awareness



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

Awareness of the Term Cultural Heritage Traveler  
Key Markets

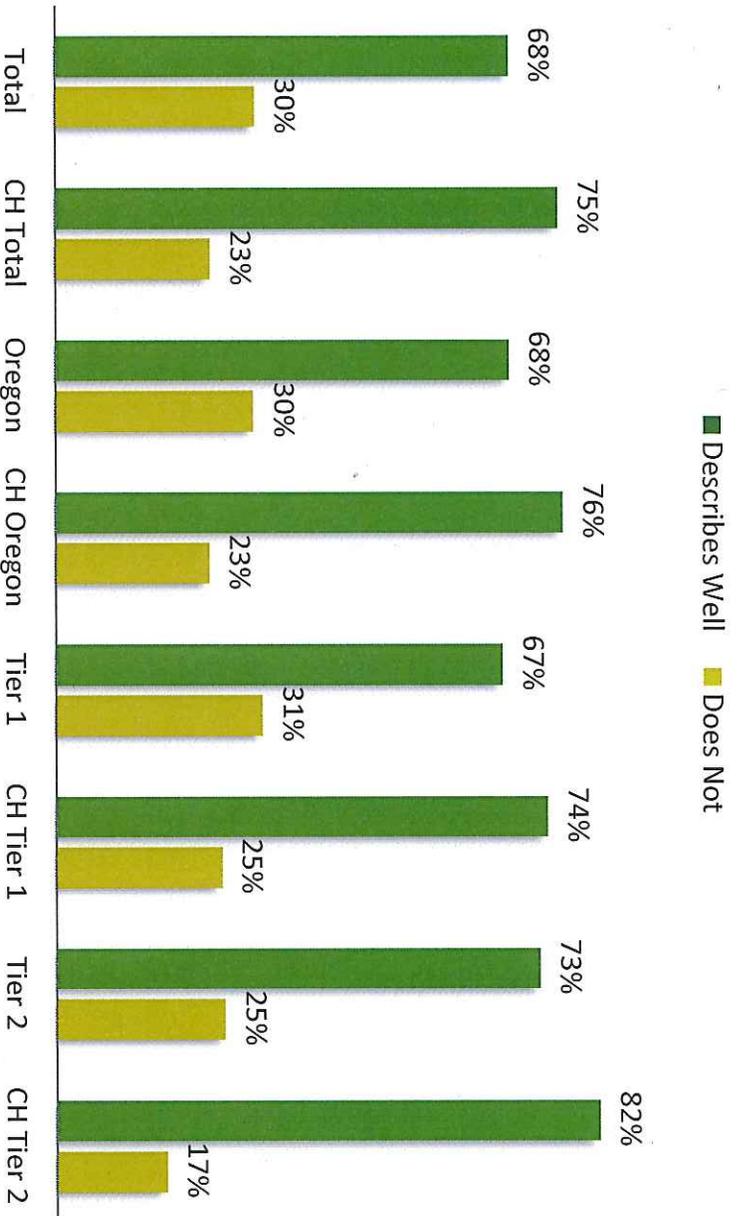


Q6. The term "cultural and/or heritage traveler" is sometimes used to describe certain types of Leisure travelers. Have you ever heard of this term?



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

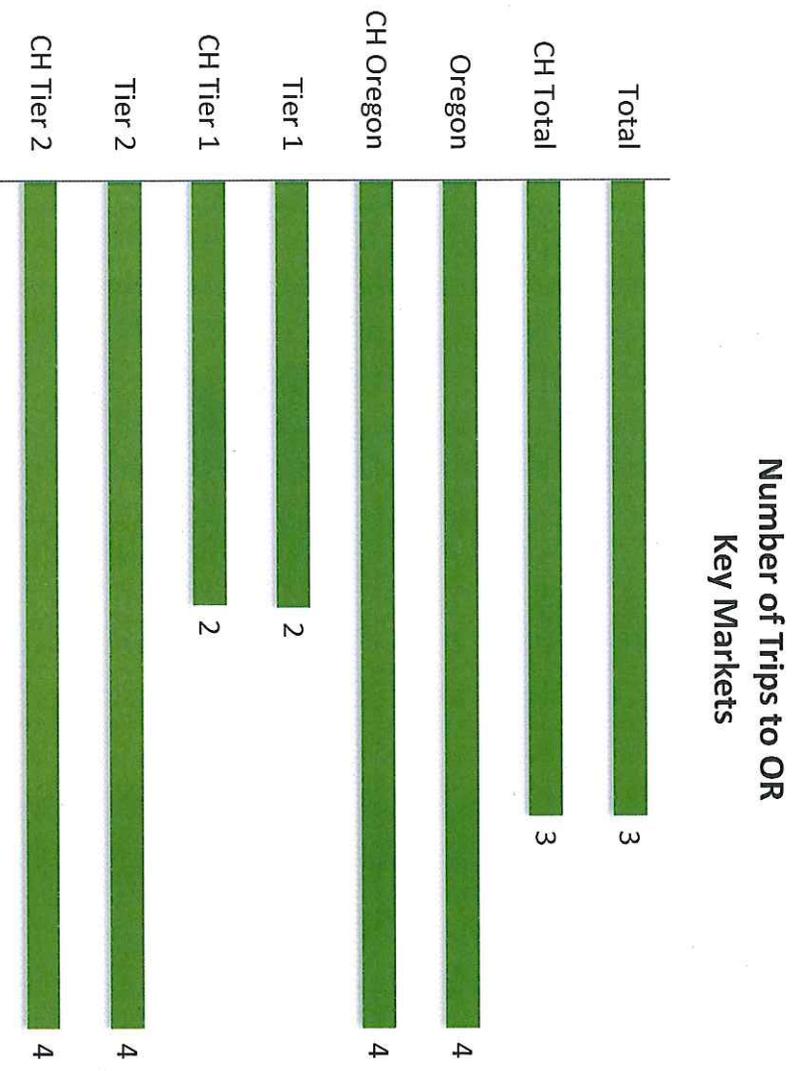
Defining Themselves as CH Travelers



[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

Q9. How many trips for leisure do you take each year in the State of Oregon?



# 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 CH		
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% <sup>a</sup>	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

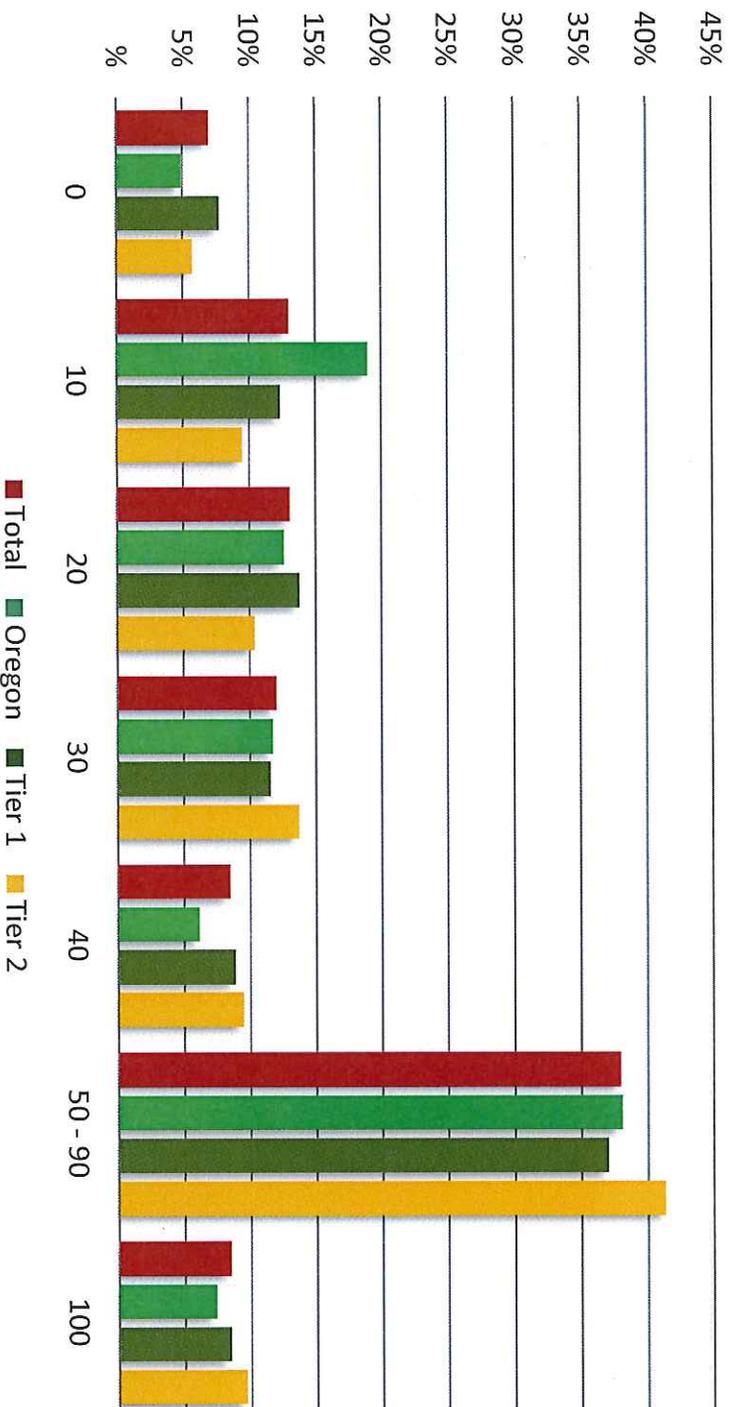
As this sample is primarily the western US based, New York and Florida rank lower than on national surveys

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%

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

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

Percentage of Business Trips that Include Leisure Activities



S3: What percentage of your domestic business travel includes personal leisure activities n=978



# Las Vegas Tops Cities Visited Among all Geographic Regions Surveyed

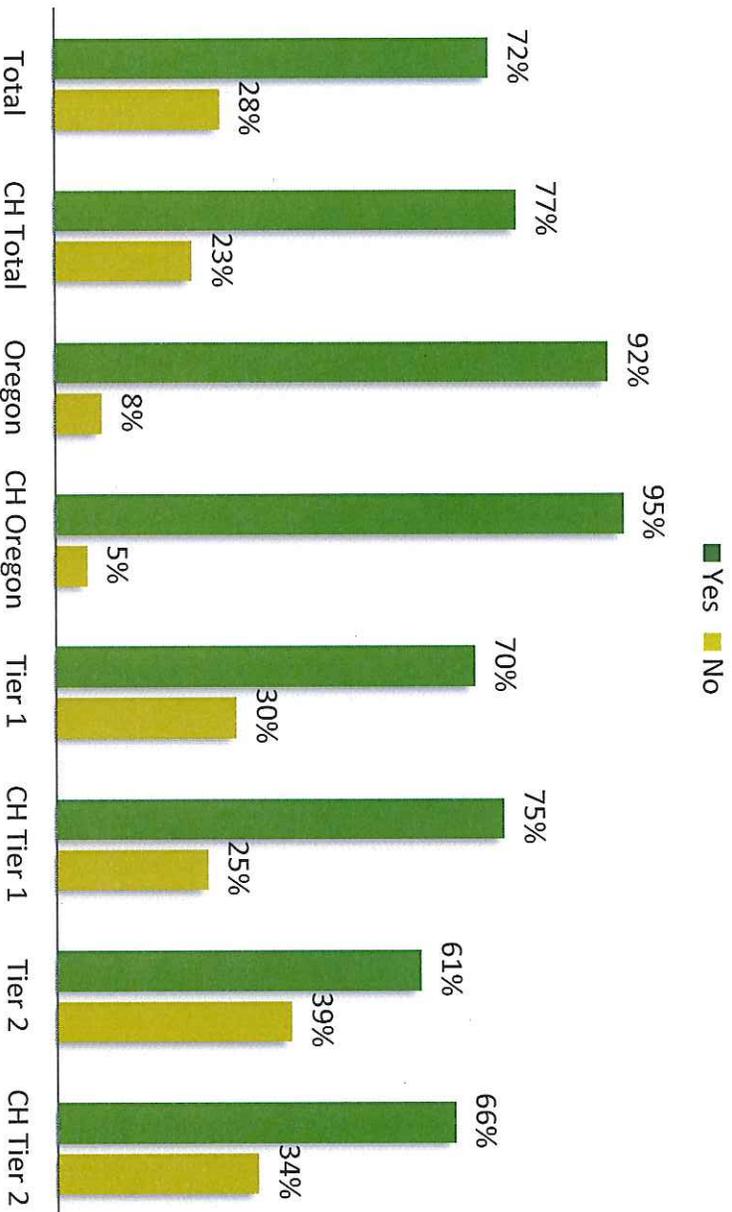
## Top Cities Visited

	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

Consider Taking Trip to Oregon 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.

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



# 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 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%	11%	12%	19%	19%	17%	18%
Landscape/Scenery/Natural Beauty	21%	19%	17%	17%	18%	20%	18%	28%	29%
Attractions: Light House Malls Historical Places/Gardens/Bookstores	10%	10%	9%	9%	9%	10%	11%	8%	8%
Visiting family	9%	9%	11%	11%	12%	9%	9%	7%	7%
Nice/ Great/Awesome	9%	10%	10%	10%	10%	10%	10%	5%	6%
Love the Outdoors/getting out into nature	6%	6%	6%	6%	5%	6%	5%	6%	7%
Mountains/beautiful hills/ Mt Hood/painted hills/ volcanic mountains/Haystack rock	8%	8%	9%	9%	9%	6%	7%	7%	8%
Natural Attractions/Crater Lake area/diversity of attractions	7%	7%	8%	8%	6%	7%	7%	7%	8%
It's not far/ closer than other states	5%	6%	6%	6%	7%	5%	6%	2%	2%
Shopping/Tax free shopping/No sales tax	5%	6%	12%	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%	5%	3%	3%	5%	5%
Born/Live There	3%	2%	1%	1%	0%	4%	2%	5%	5%
Never been there before/Never experienced	3%	3%	2%	2%	2%	3%	3%	1%	1%
Friendly people New People/ friends Different people Nice Communities /less people	3%	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	2000	1662	350	292	1350	1116	300	254
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?

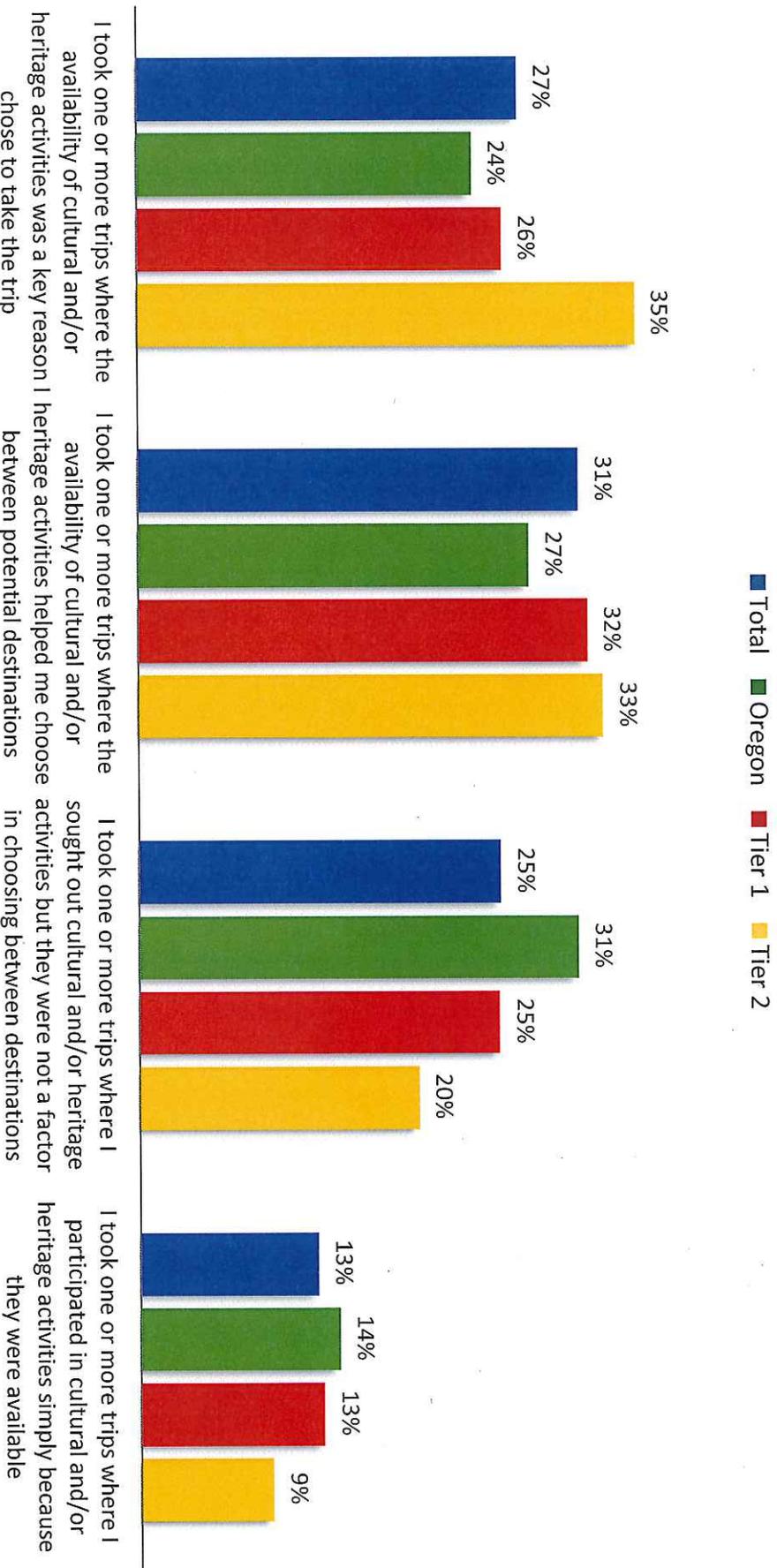


# Cultural And Heritage Activities As A Driver Of Trips Taken



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

Driver of Destination Choice

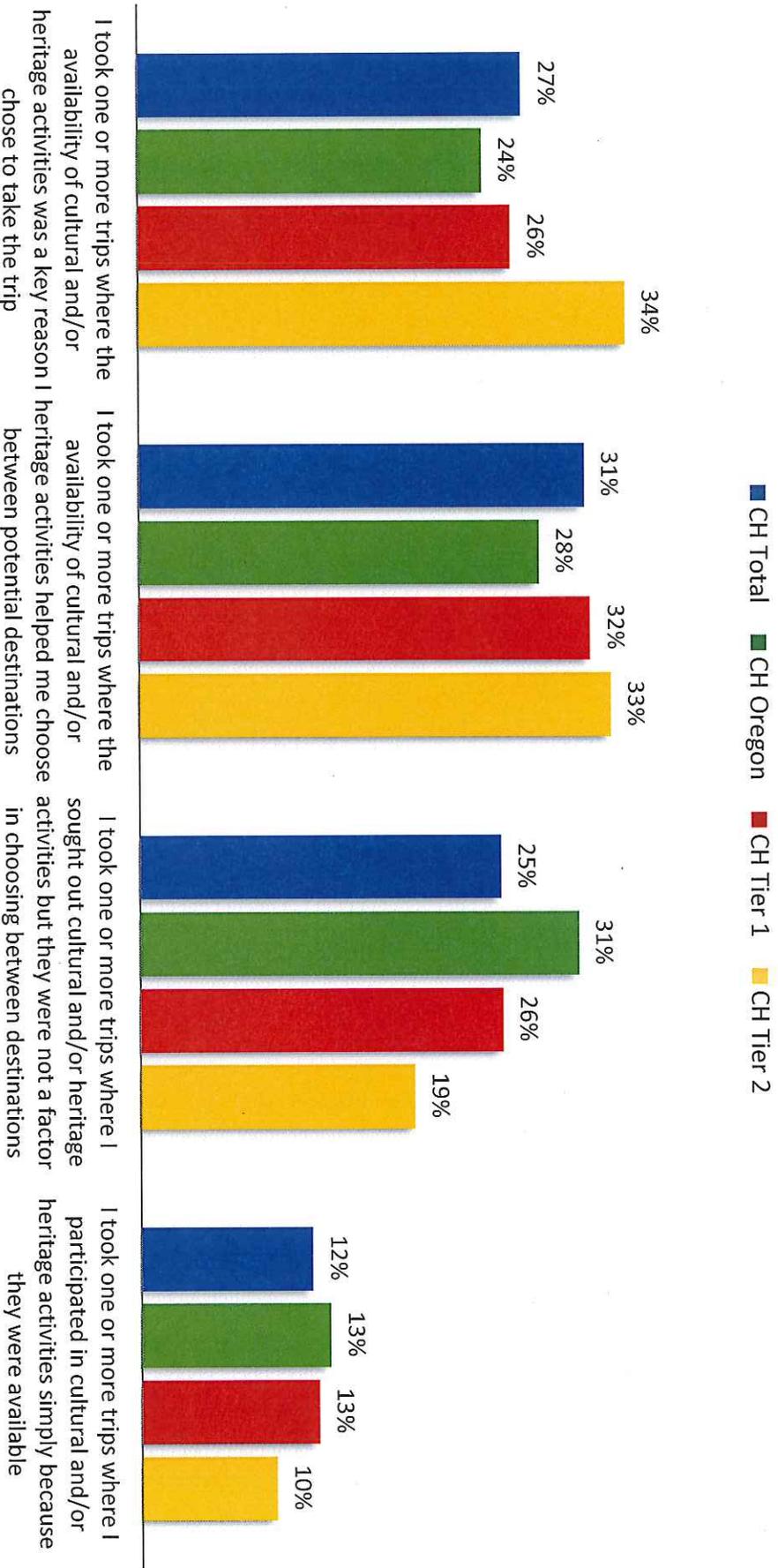


Q38. Now, thinking about all the trips you have taken over the past three (3) years in which you participated in cultural and/or heritage activities, which statement best describes you?  
 Base: people taking trips over the past 3 years with C/H activities (n=1364)



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

Driver of Destination Choice



# 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

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

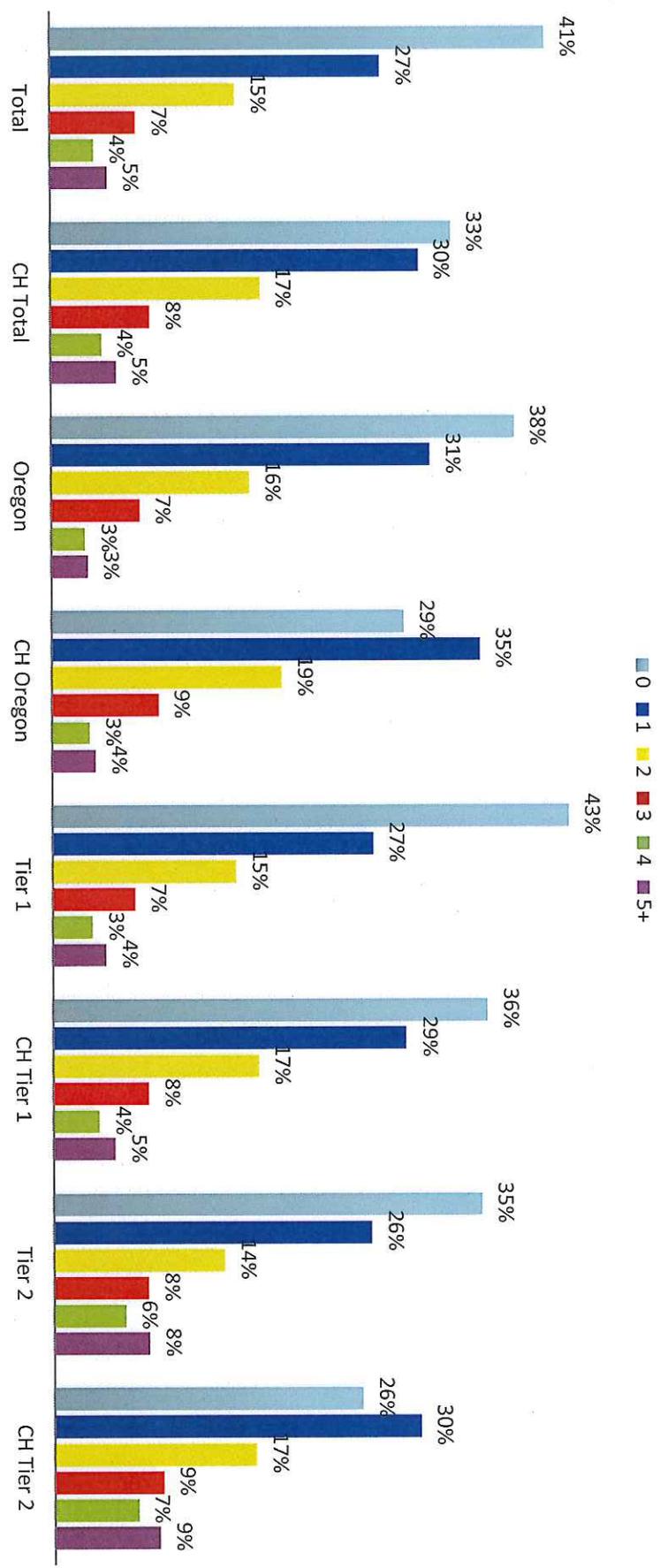
Top 20 Activities Done in Past 3 Years	Total	CH Total	Oregon	CH Oregon	Tier 1	CH Tier 1	Tier 2	CH Tier 2
Visited beaches/waterfronts	43%	47%	50%	54%	42%	46%	41%	46%
Took a scenic drive	42%	47%	48%	51%	41%	45%	42%	48%
Visited state/national parks	42%	48%	45%	50%	42%	49%	38%	43%
Shopped (general, not locally 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%

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

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

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



# 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 1999	Total CH 1662	Oregon 350	Oregon CH 292	Total Tier 1 1349	Tier1 CH 1116	Total Tier 2 300	Tier2 CH 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 1999	Total CH 1662	Oregon 350	Oregon CH 292	Total Tier 1 1349	Tier1 CH 1116	Total Tier 2 300	Tier2 CH 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?



Mandala Research, LLC

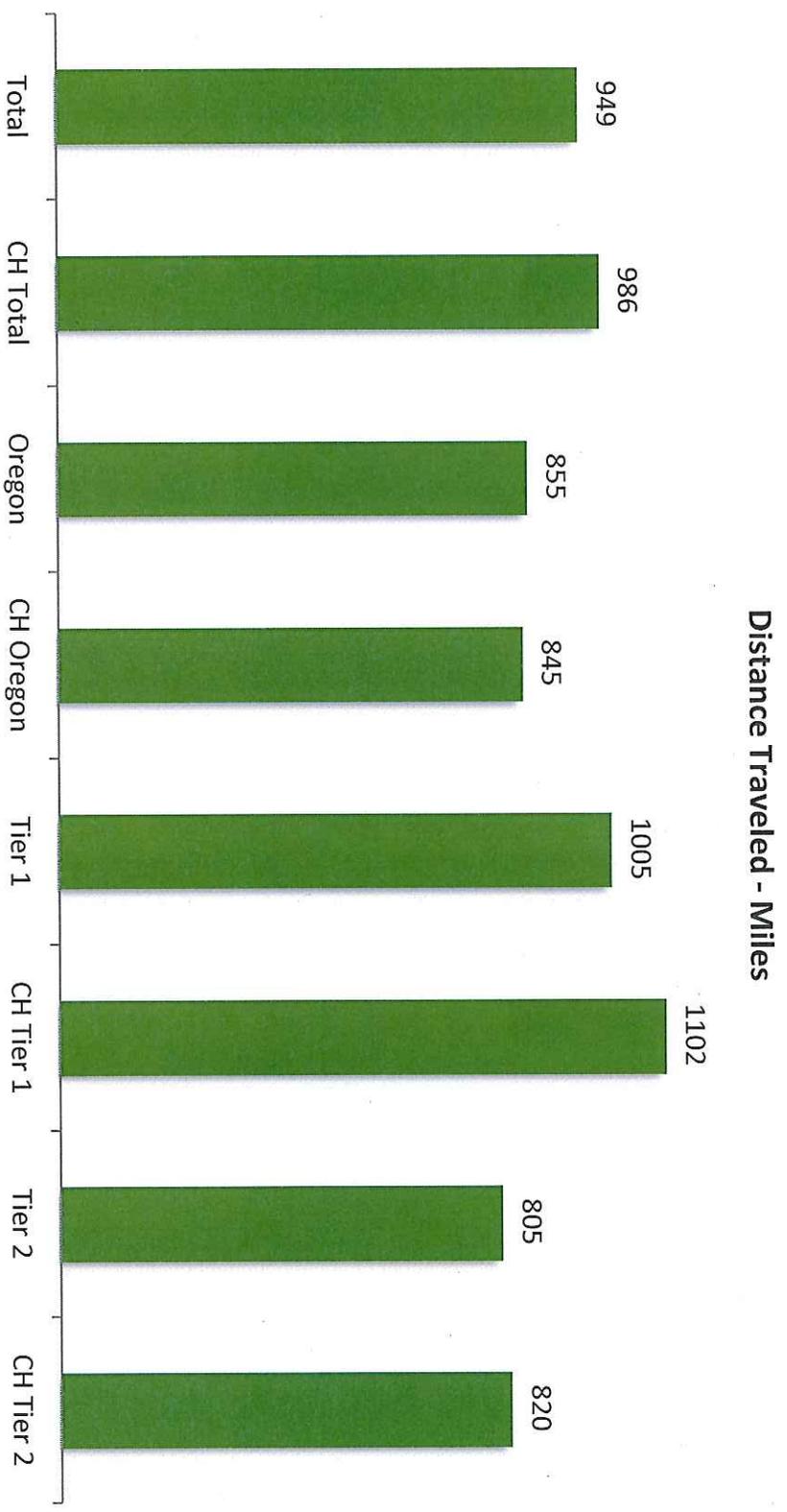
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# Trip Characteristics

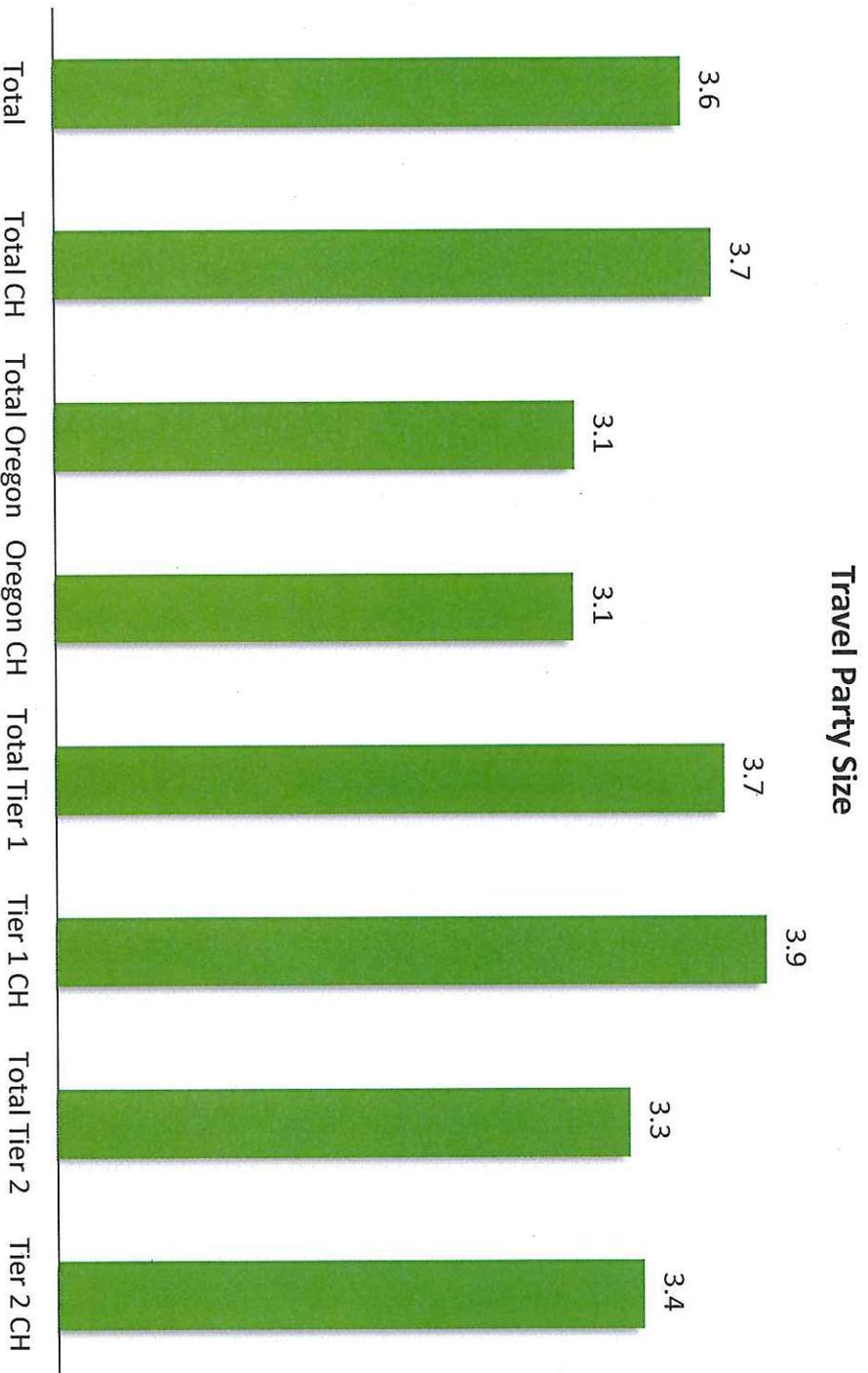


# While Tier 1 Includes Canadian Provinces, the Distance They Travel for Their Trip is Not Significantly Greater than Other Regions



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?

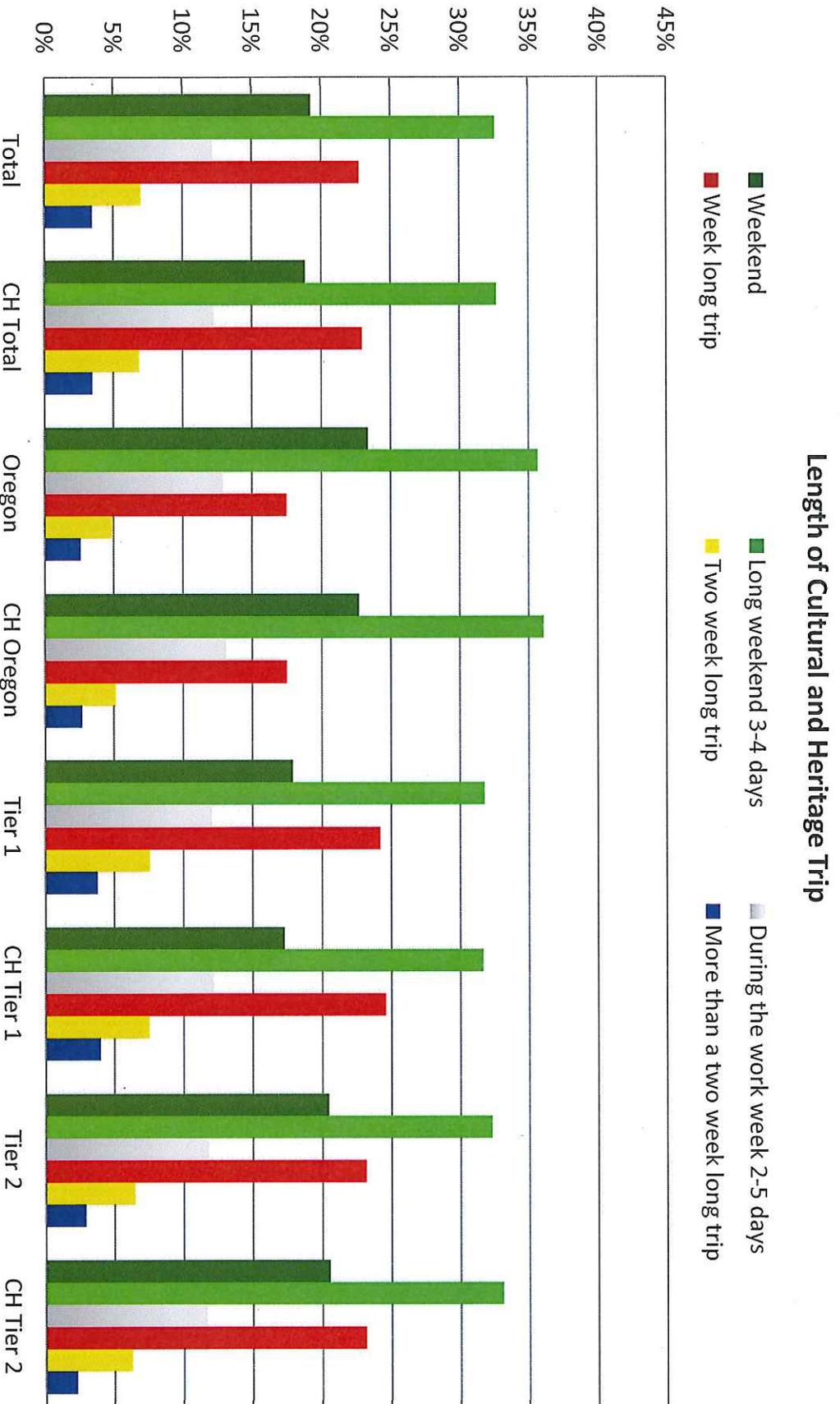


## Over Half of All Populations Surveyed Travel with Their Spouse or Significant Others; Another One-Fifth Travel with Other Family Members

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

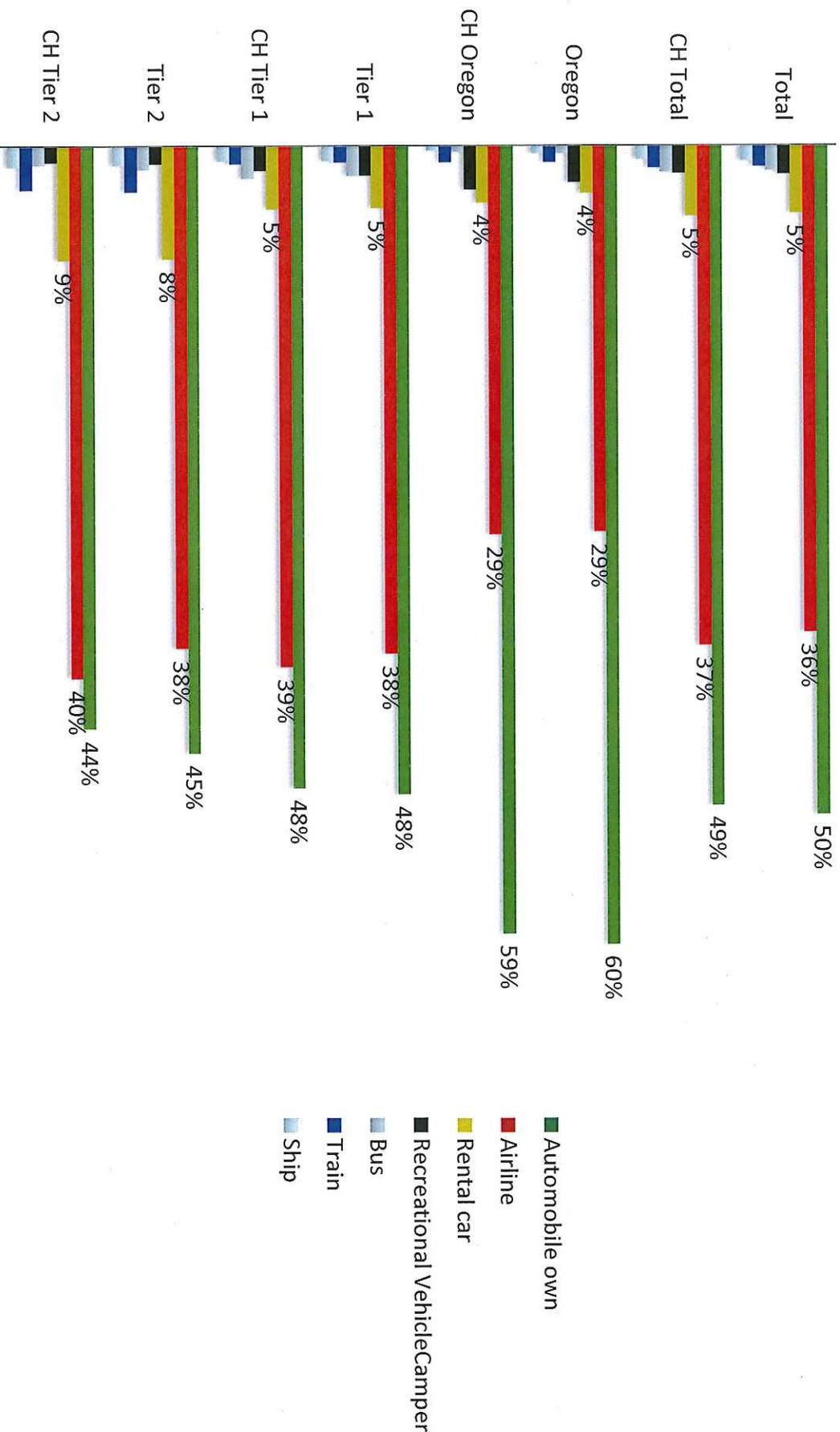
# The Long Weekend is the Most Likely Length of a CH Trip Across All Geographies



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

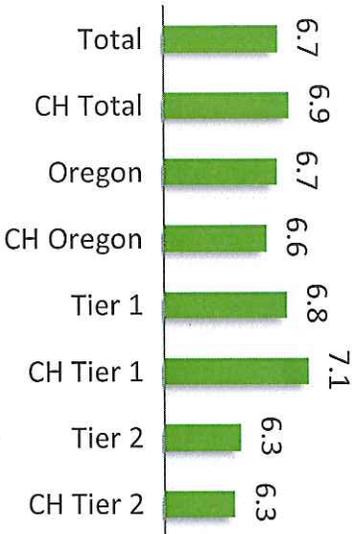
Mode of Transport on Most Recent Trip



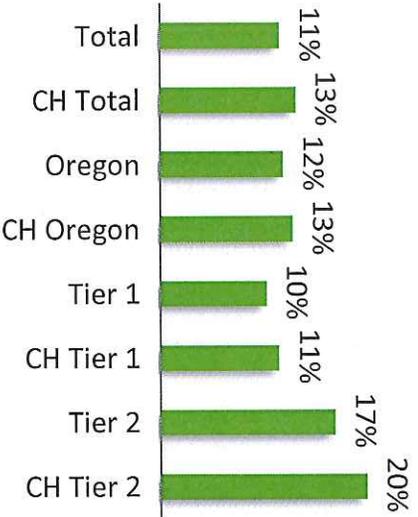
Q19. Which of the following was your primary mode of transportation to get to the destination of your most recent trip?

# 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	Oreg on	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%

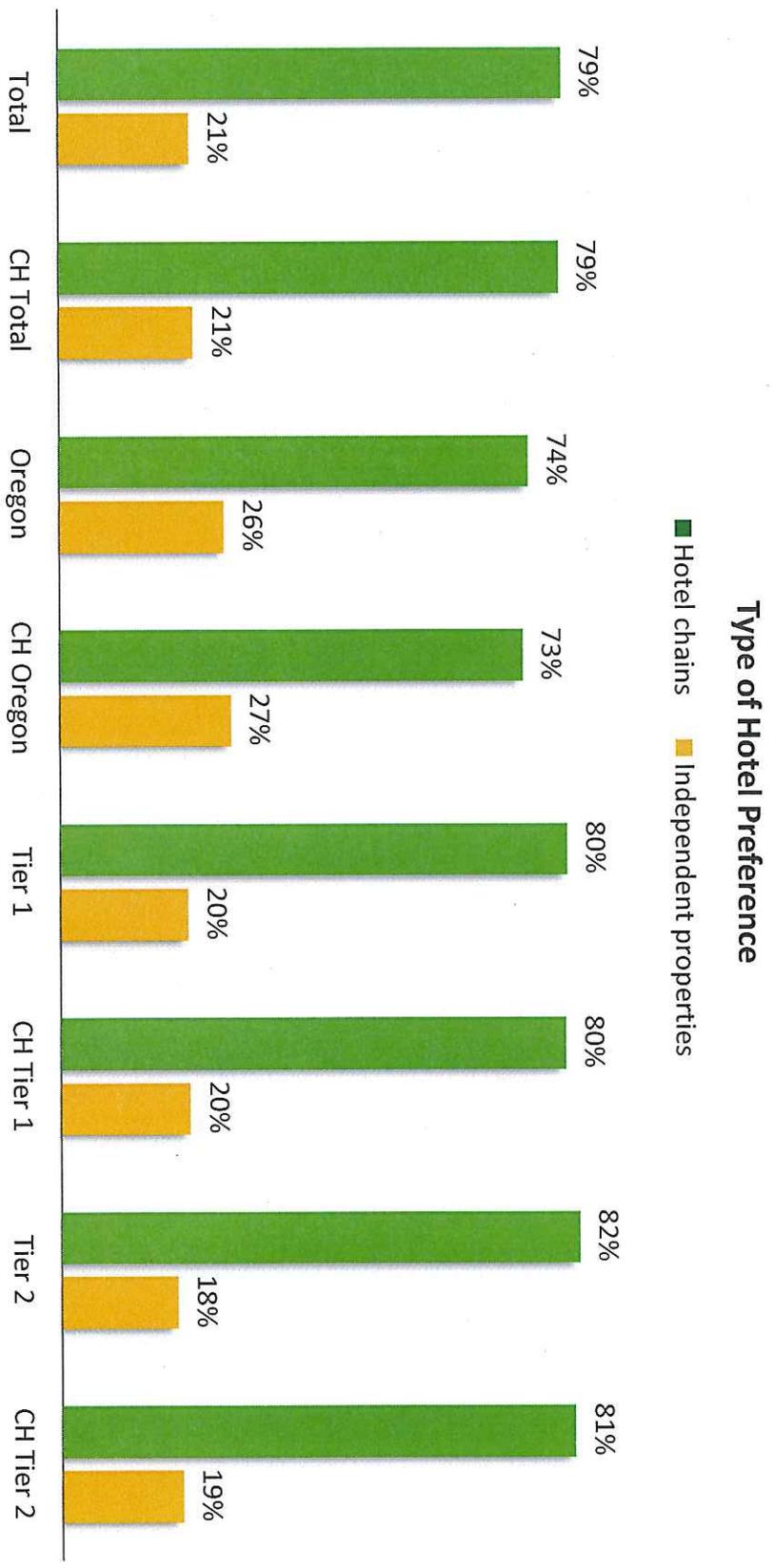
Q14: How many overnights did you stay while on this trip If your trip was just a day trip

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



Q17a. When you travel for leisure, do you prefer to stay in hotel chains or in independent properties?





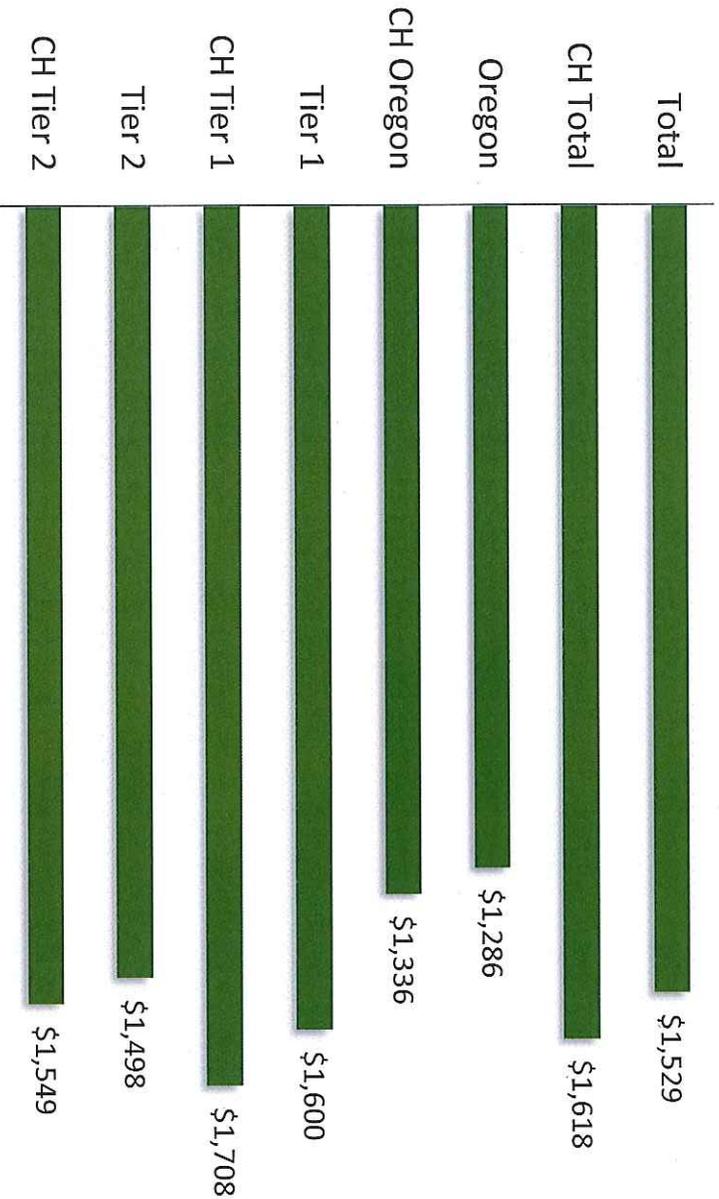
# Spending



# 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

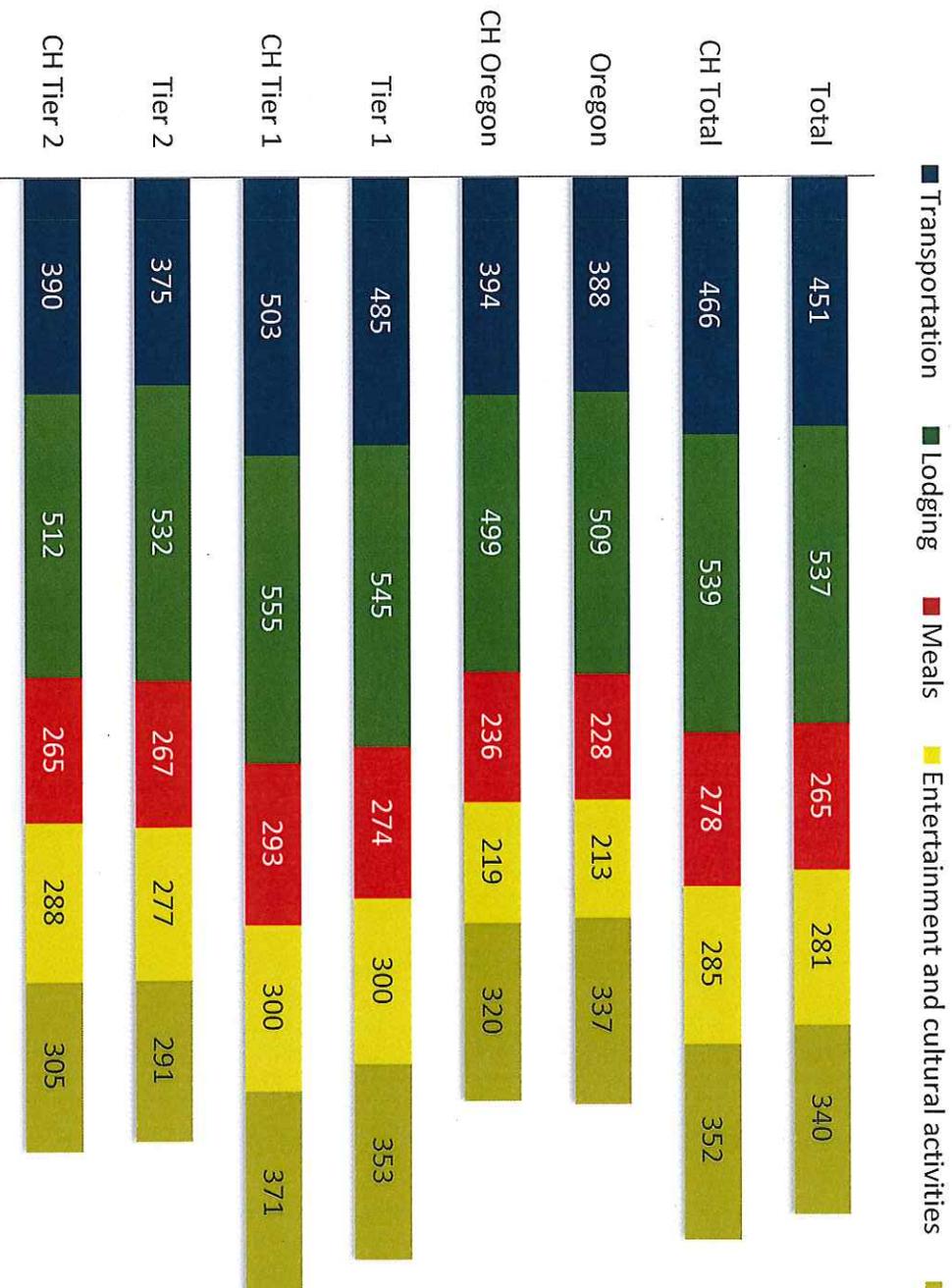


Considering Tier 1 includes Canadian provinces, there is not a big difference between Tier 1 and the overall population in terms of their spending habits

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.

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.

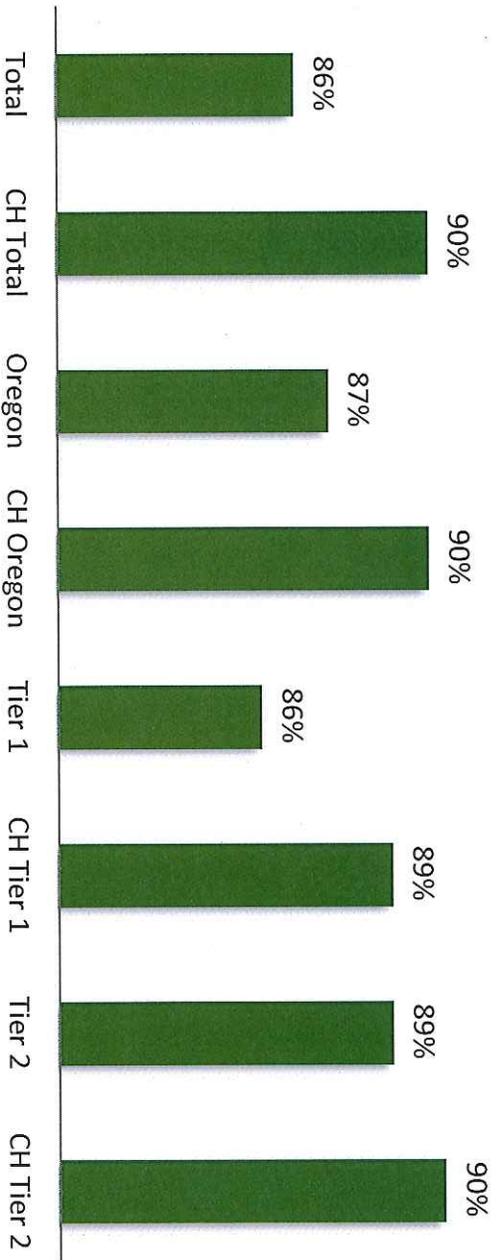


# Future Travel



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

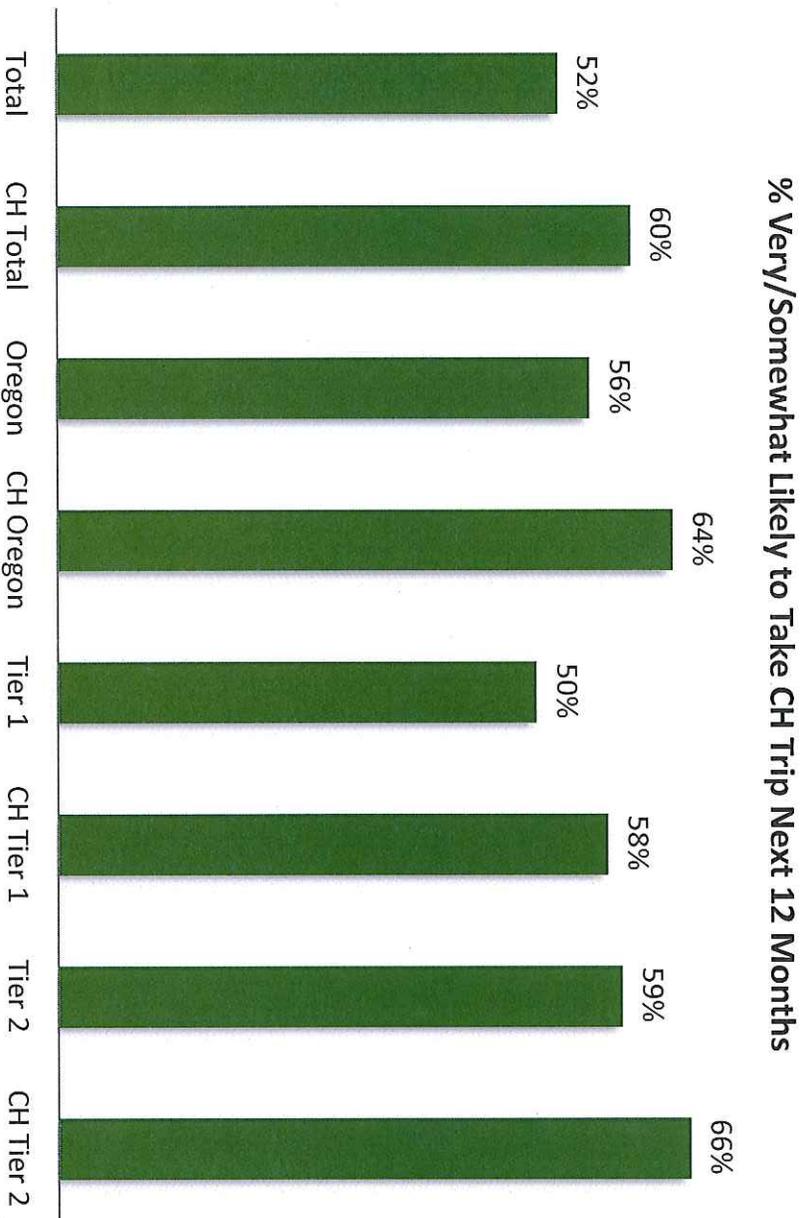
% Very/Somewhat Likely to Take A Leisure Trip Next 12 Months



Q26. How likely are you to take a leisure trip in the next 12 months?

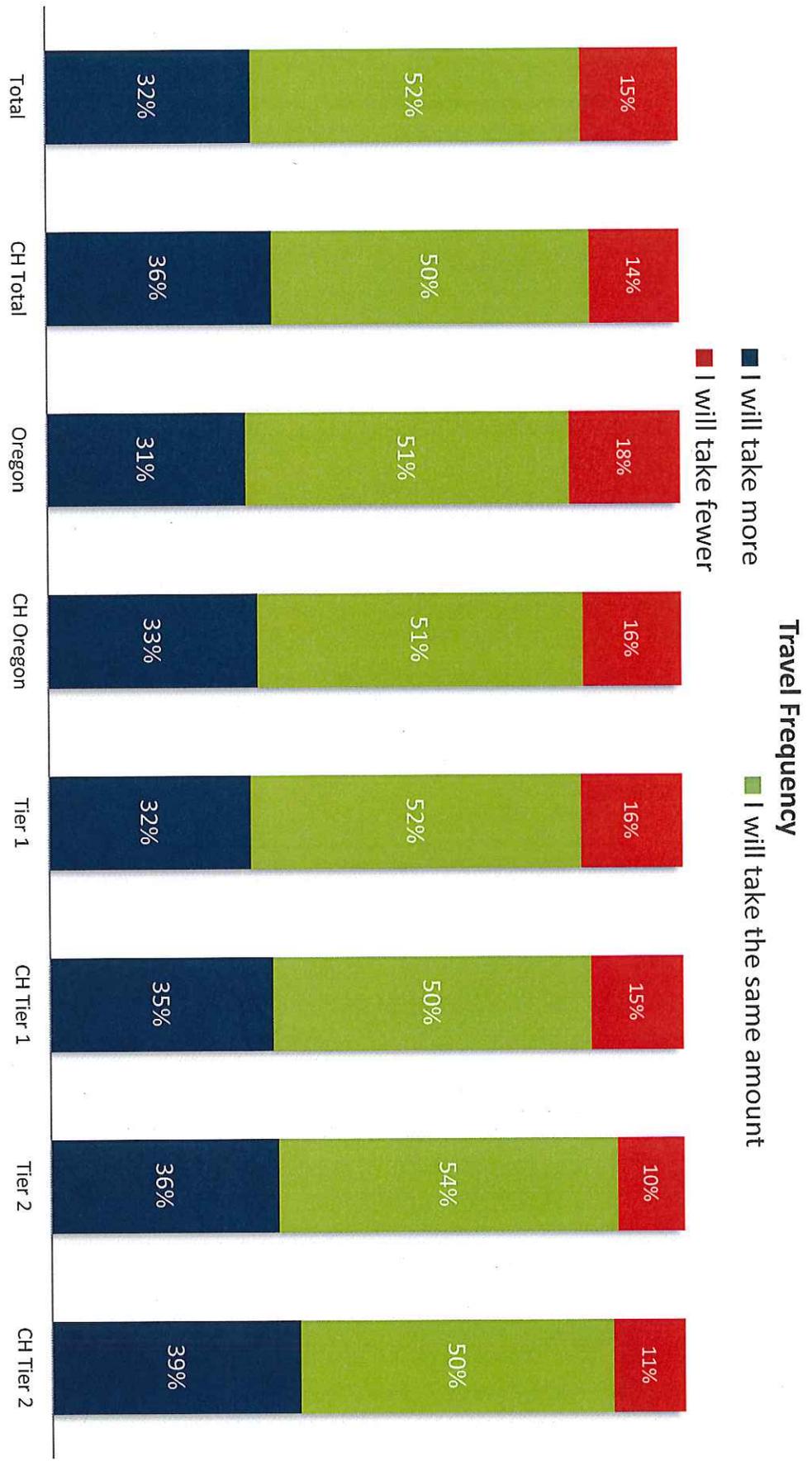


# Tier 2 Cultural and Heritage Travelers Are Also Most Likely to Take a Cultural and Heritage Trip In the Near Future



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

# 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%

Q27: Which of the following if any has an impact on your taking a leisure trip in the next 12 months n=247



# 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%

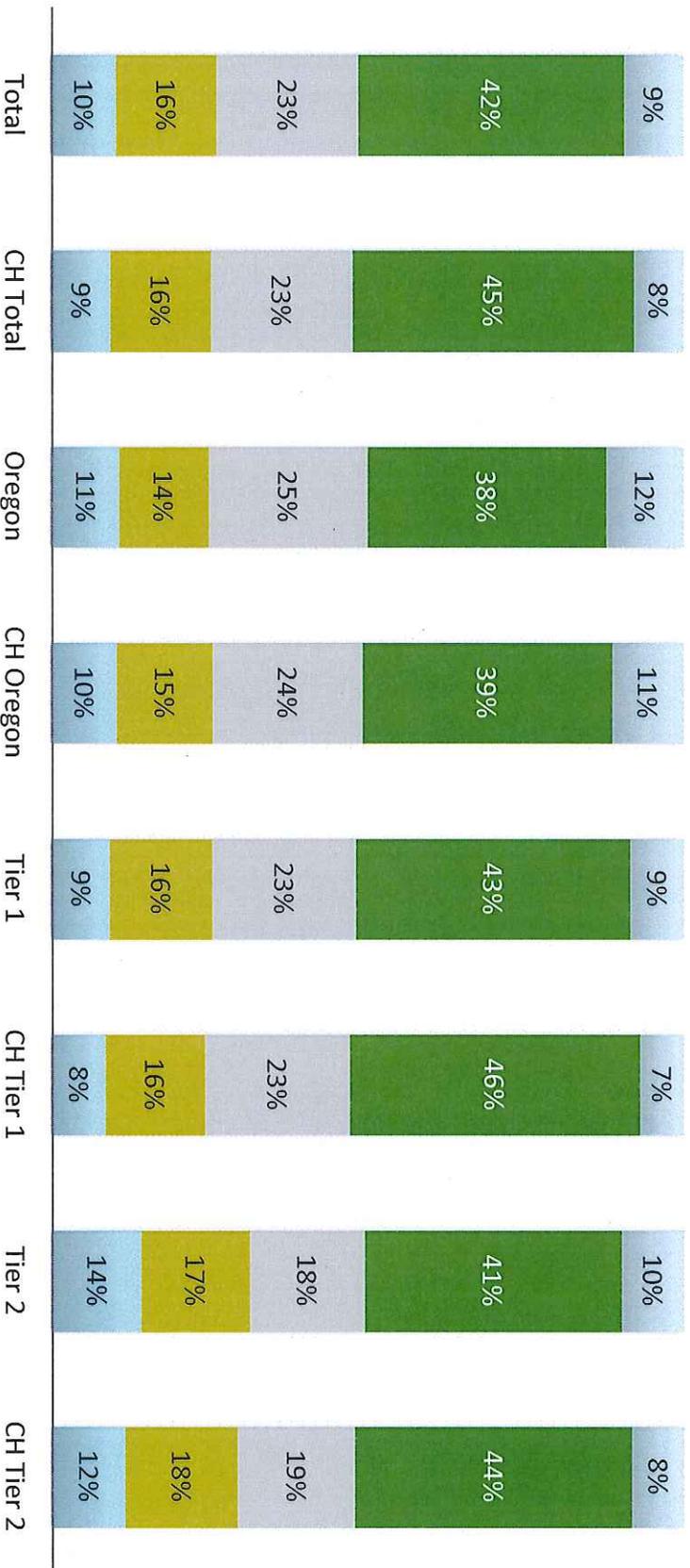
Q34. Which of the following social networking sites do you use on a regular basis?

# 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



Q35 How long have you used social networking sites?



# 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%
Savour	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%

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

# 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%

Q32d. Which of the following types of cultural publications do you typically read, either in print or online?