

Table of Contents

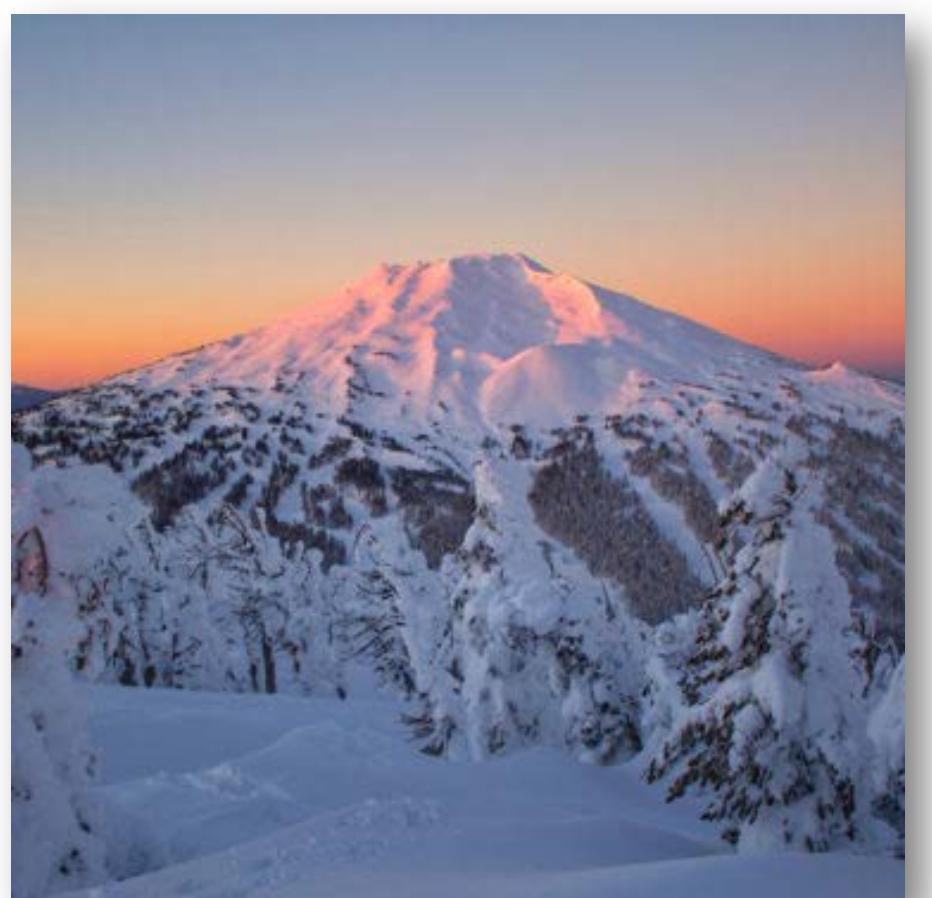
Research Overview & Objectives	3
Research Methodology	4
Executive Summary of Findings	5
Leisure Travel Behaviors	11
Central Oregon's Competitive Situation	17
The Central Oregon Brand	26
Central Oregon's High Potential Visitors	35
Traveler Activity Indices	44
Marketing to Leisure Travelers	59
Demographic Profile	69



Above: Images of Central Oregon. Courtesy of Instagram.com/VisitCentralOregon.

Research Overview & Objectives

- Evaluate perceptions of and associations with the Central Oregon brand
- Identify the various media and planning resources used by traveler segments
- Identify the resources and devices (mobile vs. desktop) used in different stages of the travel planning process
- Determine the types of messaging and content most appealing to traveler segments
- Develop profiles of traveler segments
- Index travelers on specific activities



Above: Images of Central Oregon. Courtesy of Instagram.com/VisitCentralOregon.

Research Methodology

1) Survey of Travelers in Key Markets

- Must be adults age 18+
- Must have taken at least one overnight leisure trip of at least 100-miles one way away from home in the past 12 months
- Must live within 75 miles of the cities of Los Angeles, CA; Phoenix, AZ; San Francisco, CA or Seattle, WA
- 400 completed surveys in each market
- 1,618 total completed responses collected



2) Survey of Consumers

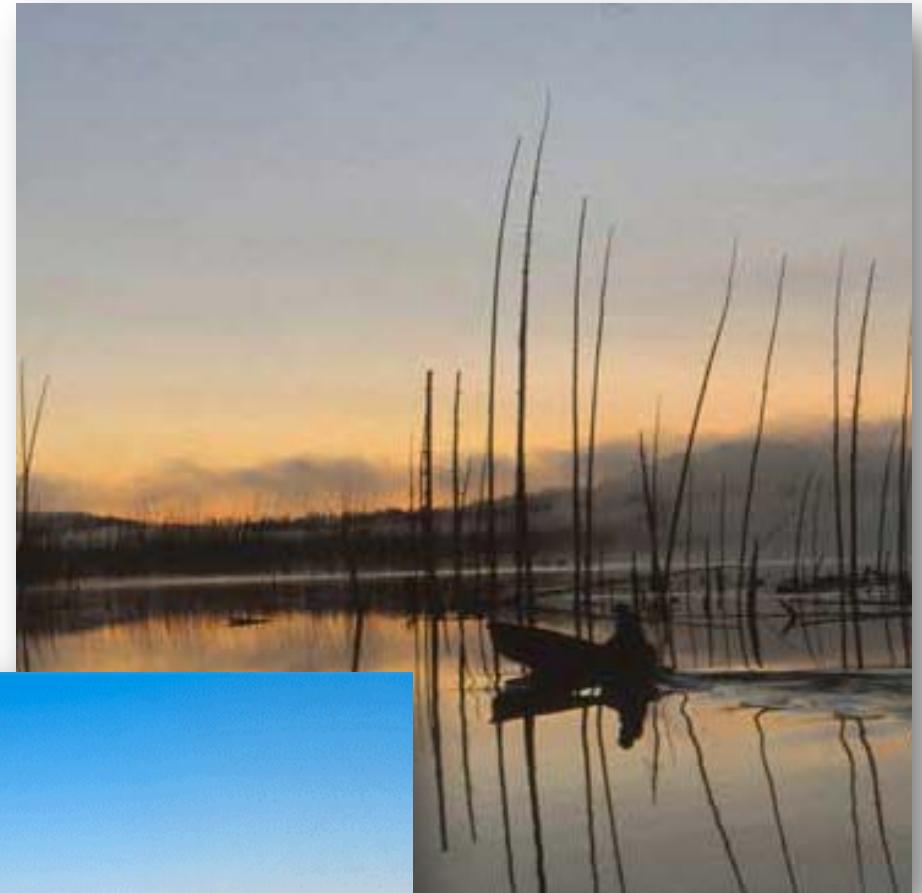
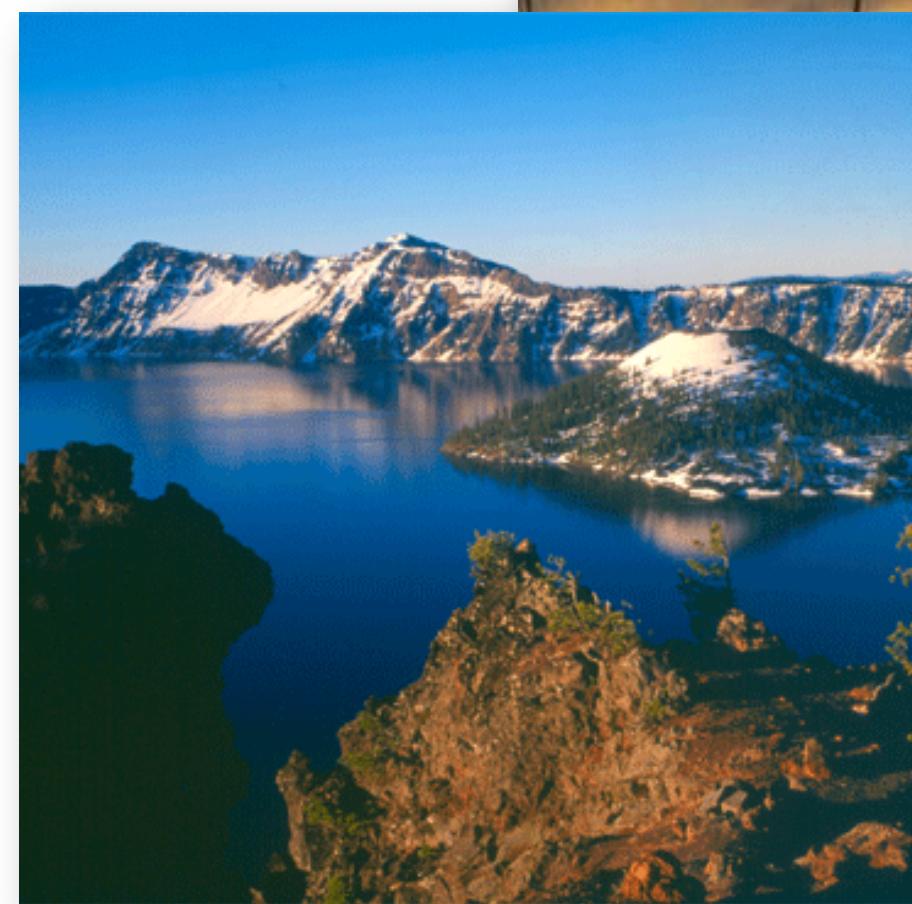
- Email invitation sent to all consumer contacts provided
- No screening requirements
- 2,160 total completed responses collected

Above: Images of Central Oregon. Courtesy of Instagram.com/VisitCentralOregon.

EXECUTIVE SUMMARY OF FINDINGS

Executive Summary

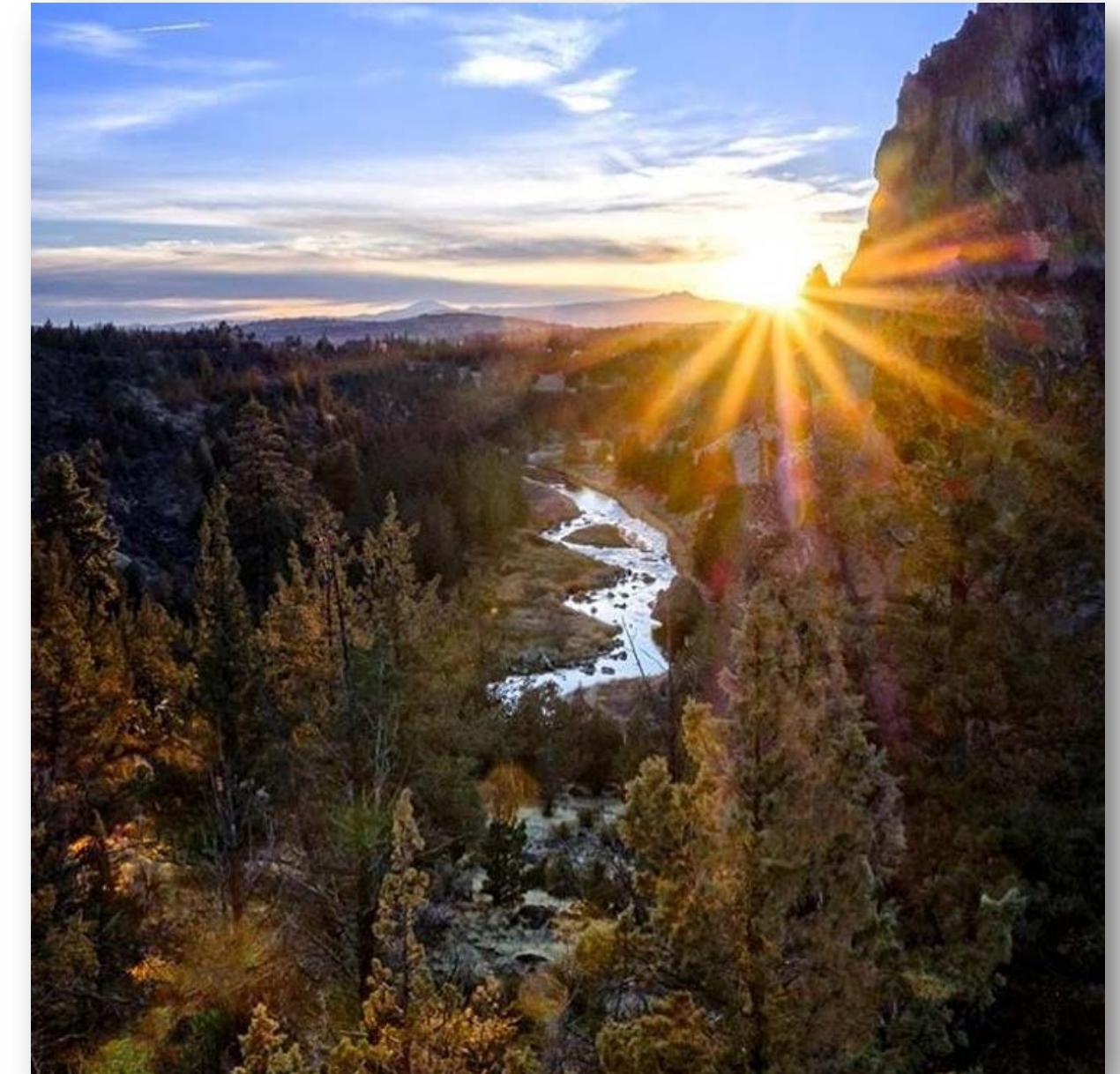
- Leisure travelers have a slightly higher preference for urban experiences over nature experiences.
- Leisure travelers show a strong preference for warm season travel over winter season travel.
- A destination's culinary and cultural experiences have strong emotional draws for leisure travelers.
- Central Oregon faces strong regional competition from large cities and National Parks.
- Travelers simply don't know enough about Central Oregon, highlighting an opportunity to educate them about valued destination attributes.
- Affordability, restaurants, scenic beauty and the opportunity to "get away from it all" are the most important attributes in selecting destinations to visit in the Pacific Northwest region.
- Despite the relatively low level of familiarity with Central Oregon, it's considered an exciting destination and leisure travelers are likely to visit in the near future.



Above: Images of Central Oregon. Courtesy of Instagram.com/VisitCentralOregon.

Executive Summary (continued)

- Central Oregon is most commonly associated with the outdoors, nature and hiking.
- Scenic beauty and being remote/unspoiled are perceived to be Central Oregon's distinguishing destination attributes.
- Central Oregon performs well for outdoor recreation, off the beaten path ambiance, resorts/lodges, craft breweries, winter recreation and golf, yet these destination attributes are less important to the destination choice.
- Consider prioritizing Central Oregon's affordability, restaurant scene, scenic beauty and the chance to "get away from it all" in its messaging.
- Educate travelers about Central Oregon's unique assets.



Above: Image of Central Oregon. Courtesy of Instagram.com/VisitCentralOregon.

Executive Summary (continued)

- Summer has more potential for traveler volume, however there is also winter potential should COVA wish to drive more visitation in the winter.
- Amongst the markets studied, Los Angeles has the strongest potential for both summer and winter travel to Central Oregon.
- Nature and water scenery have the strongest draw for generating excitement about a trip to Central Oregon.
- Leisure travelers prefer to use a desktop device for tactical and logistical travel planning tasks - to book airfare/transportation, lodging and purchase tickets.
- Leisure travelers are likely to use a mobile device for more inspirational purposes - researching trip ideas and places to go, although the preference to use a desktop/laptop for these tasks is still higher.



Above: Image of Central Oregon. Courtesy of Instagram.com/VisitCentralOregon.

Top Areas of Education for Leisure Travelers

Based on the findings that emerged from this research, Destination Analysts recommends that COVA educate leisure travelers about Central Oregon's unique assets and attributes, as well as the attributes that leisure travelers most value when evaluating destinations to visit in the Pacific Northwest. These include:

- **Restaurants and cuisine** – In addition to culinary experiences being very important when traveling, leisure travelers also cited local cuisine as an experience that Central Oregon offers visitors. However, while Central Oregon was highly rated for its restaurants, there is a slight deficit in which restaurants are much more important to selecting leisure destinations in the Pacific Northwest than the volume of leisure travelers who rate Central Oregon's dining scene to be good or very good. Communicating Central Oregon's unique restaurants and culinary experiences may ultimately increase the ratings of the destination in this area that is highly valued by leisure travelers.
- **Nature and scenic beauty** – Scenic beauty was the number one highly rated destination attribute of Central Oregon, as well as one of the top three most important attributes in selecting Pacific Northwest leisure destinations. Nature and scenic beauty is clearly a brand pillar of Central Oregon, with leisure travelers most commonly describing the destination as "lush nature" and "beautiful scenery" in an unaided question and the word "beautiful" being the most commonly selected description of Central Oregon in an aided question. Furthermore, "lush natural beauty/scenery" and "remote/unspoiled" were the attributes perceived to distinguish Central Oregon from other destinations in the Pacific Northwest. When asked to rank the top images of Central Oregon that make them most excited about visiting, leisure travelers surveyed highly rated scenic images of nature during the summertime, such as waterfalls, water alongside mountains and trails. With the strong perception of Central Oregon being a destination in which travelers can experience nature and scenic beauty, it may be worthwhile to continue showcasing this distinguishing attribute in COVA's marketing.
- **Affordability** – Amongst leisure travelers surveyed, affordability is the most important attribute in selecting Pacific Northwest destinations. However, Central Oregon's rating as an affordable destination falls below affordability's importance in evaluating Pacific Northwest destinations. Furthermore, over one-in-ten leisure travelers reported that expensive gasoline and/or airfare were deterrents to visiting Central Oregon more often. While Central Oregon may indeed be an affordable destination, this important attribute may not be commonly known amongst travelers in COVA's key target markets, highlighting an opportunity to promote Central Oregon's affordability in consumer messaging.

Top Areas of Education for Leisure Travelers (continued)

- **Relaxation and escape** – The chance to “get away from it all,” was one of the most valued attributes in selecting Pacific Northwest destinations. Similarly, having an off-the-beaten path ambience is also important, though to a lesser degree. The opportunity to “get away from it all” was also one of Central Oregon’s highly rated attributes and is alignment with the volume of leisure travelers who consider this attribute important to evaluating Pacific Northwest destinations, while Central Oregon performs extremely well for having an off-the-beaten path ambience. When asked to select the words that accurately describe Central Oregon, “relaxing” was the third most common word selected by leisure travelers surveyed. In addition, the destination being “remote/unspoiled” and “quiet/peaceful” illustrate Central Oregon’s distinguishing features, and support the sense of relaxation and escape during a leisure trip.
- **Outdoor recreation** – Synonymous with Central Oregon’s beautiful scenery, outdoor recreation is clearly one of the destination’s brand pillars. When asked to write in the experiences offered by Central Oregon and descriptions of the destination, leisure travelers surveyed both specifically and generally wrote in outdoor activities, such as “hiking,” “fishing,” “outdoor recreation” and “water activities.” Although outdoor recreation is not highly valued in selecting Pacific Northwest leisure destinations (relative to affordability, restaurants and scenic beauty), Central Oregon is highly rated for its outdoor activities. Furthermore, the top four ranked images that made leisure travelers most excited about taking a trip to Central Oregon included outdoor recreation alongside scenic beauty, such as images of hikers and stand-up paddleboarders. Despite the fact that leisure travelers associate Central Oregon with the outdoors, continuing to display outdoor activities and recreation in marketing material will support the destination’s brand positioning and potentially strengthen the appeal of visiting Central Oregon for those reasons.



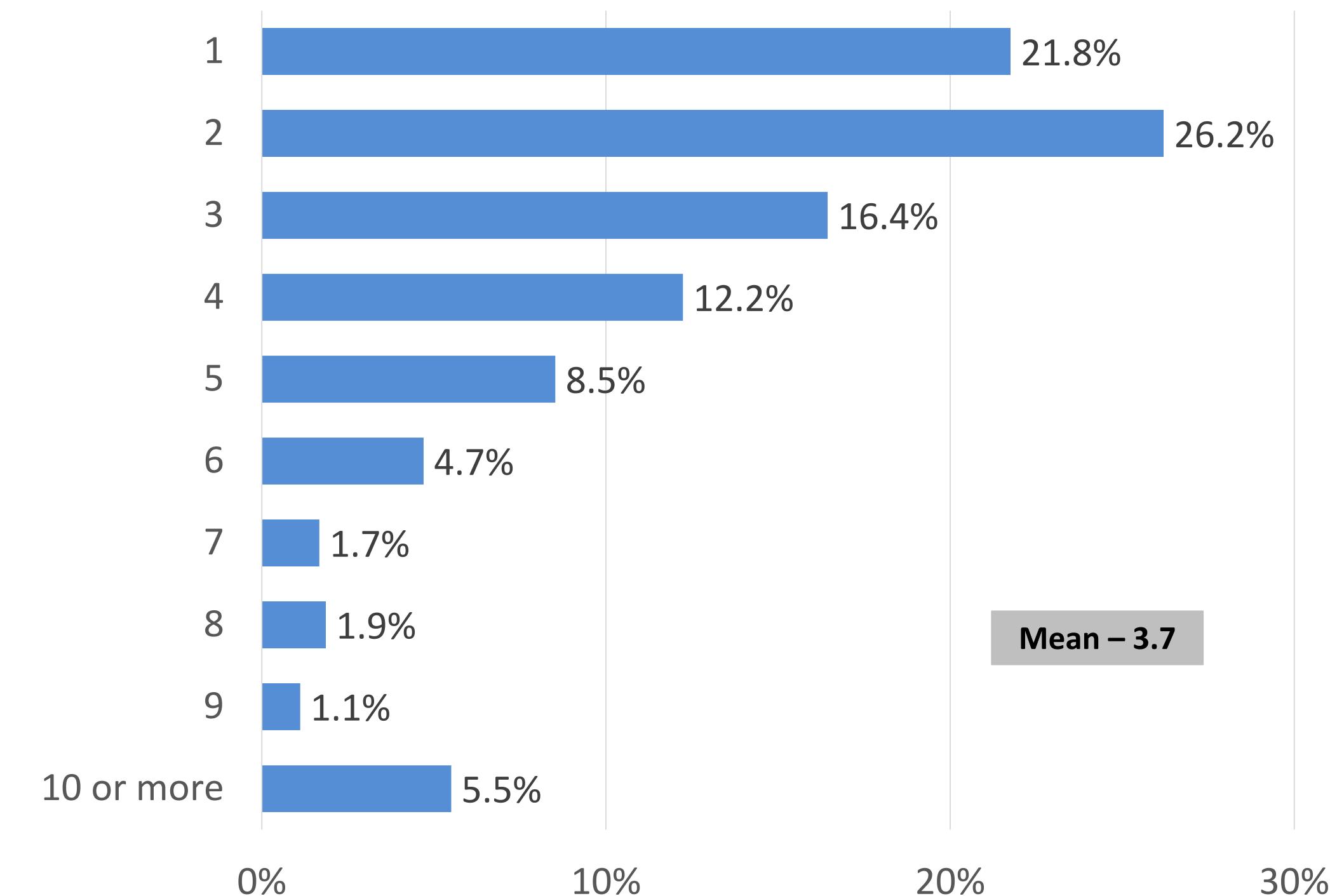
Above: Image of Central Oregon. Courtesy of Instagram.com/VisitCentralOregon.

LEISURE TRAVEL BEHAVIORS

Leisure Trips in the Past Year

On average, travelers surveyed took 3.7 overnight leisure trips in the past year.

Figure: Leisure Trips in the Past Year

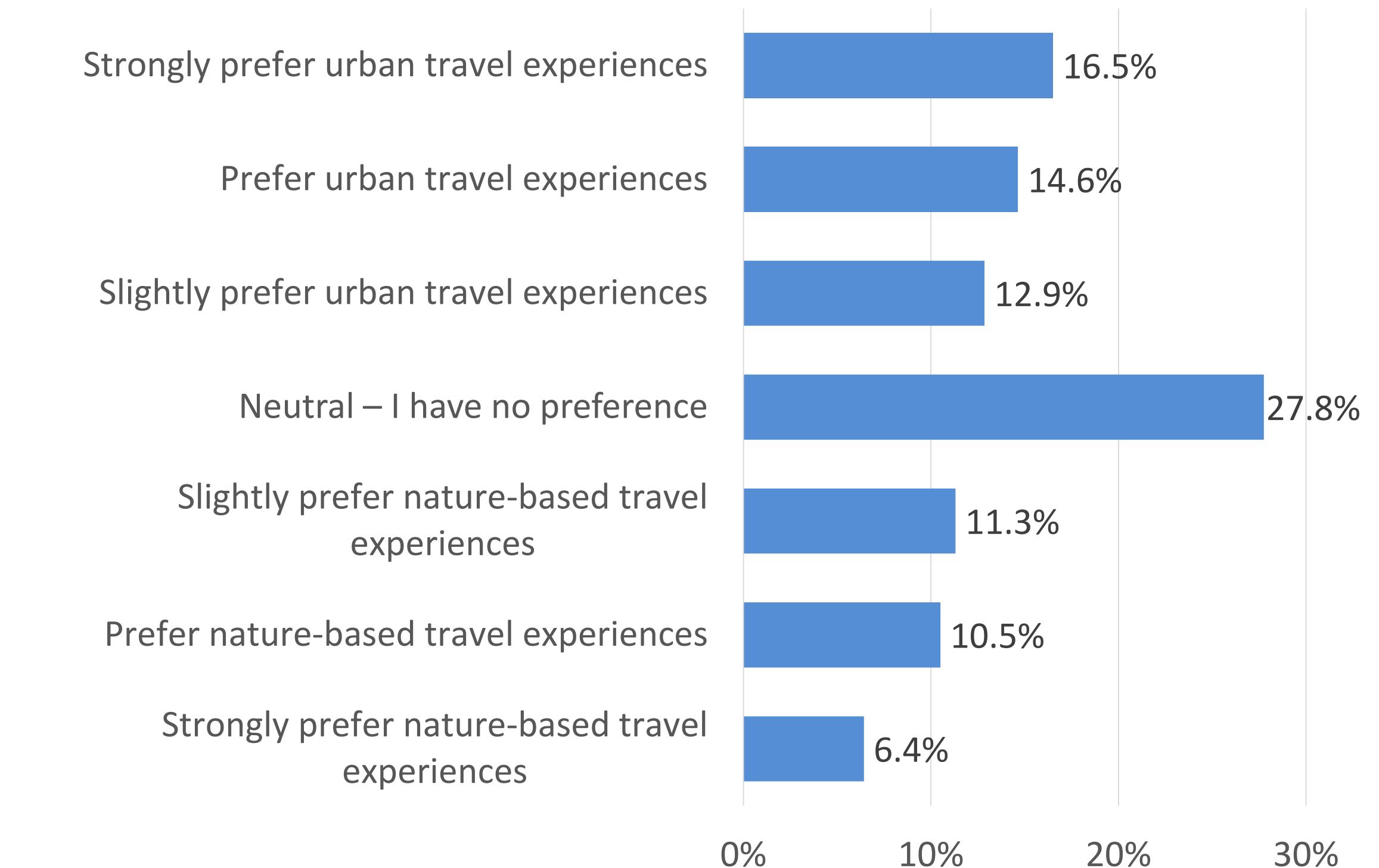


Question: In the past 12 months, how many OVERNIGHT LEISURE TRIPS of more than 100 miles one-way from your home have you taken? Please include all trips for leisure or personal reasons to destinations more than 100 miles from your home and select the numeric value below.
Base: All respondents. 1,618 responses.

Urban Travel vs. Nature-Based Travel

Leisure travelers surveyed skew slightly towards urban travel experiences.

Figure: Urban Travel vs. Nature-Based Travel

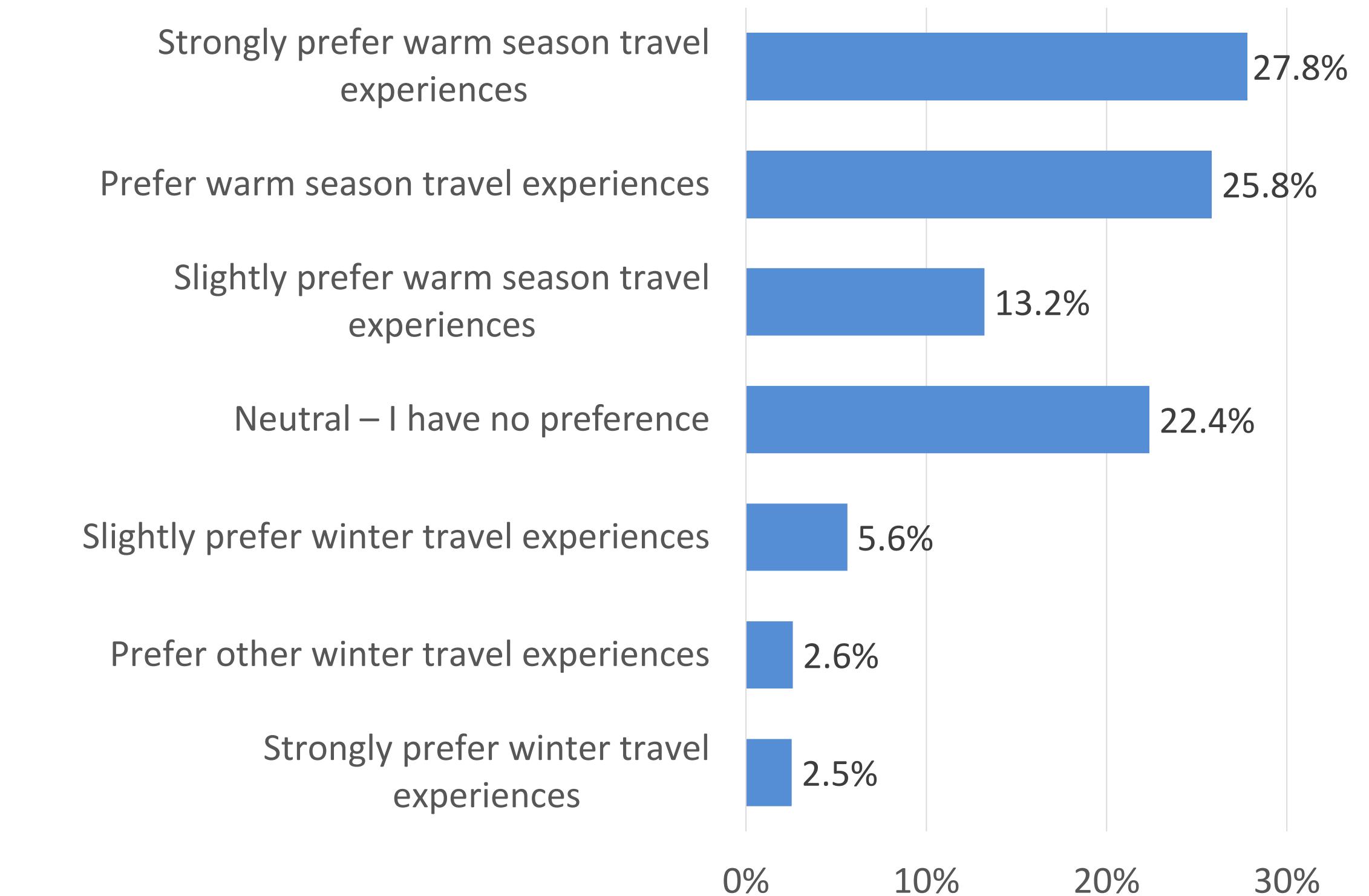


Question: Please think about the types of vacations you most like to take. Which best describes your preference for urban travel experiences compared to nature-based travel experiences?
Base: All respondents. 1,618 responses.

Warm Season Travel vs. Winter Travel

The majority of leisure travelers in key markets show a strong preference for warm season travel.

Figure: Warm Season Travel vs. Winter Travel

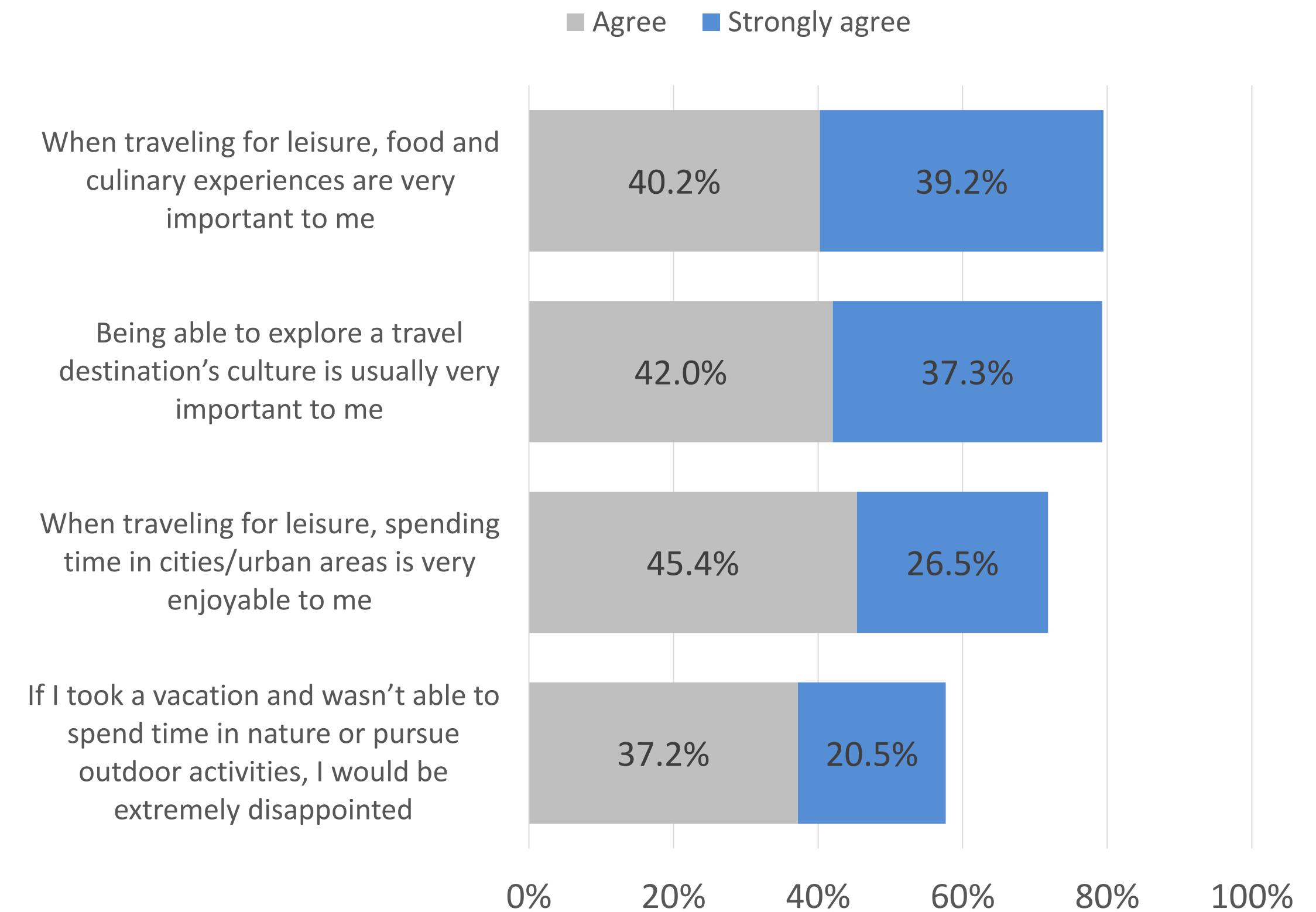


Question: In terms of your travel experiences, which best describes your preference for warm season travel experiences compared to winter travel experiences? Base: All respondents. 1,618 responses.

Leisure Traveler Psychographics

Culinary and cultural experiences—both typically associated with urban settings—have the strongest emotional draw to travelers in these key markets.

Figure: Leisure Traveler Psychographics

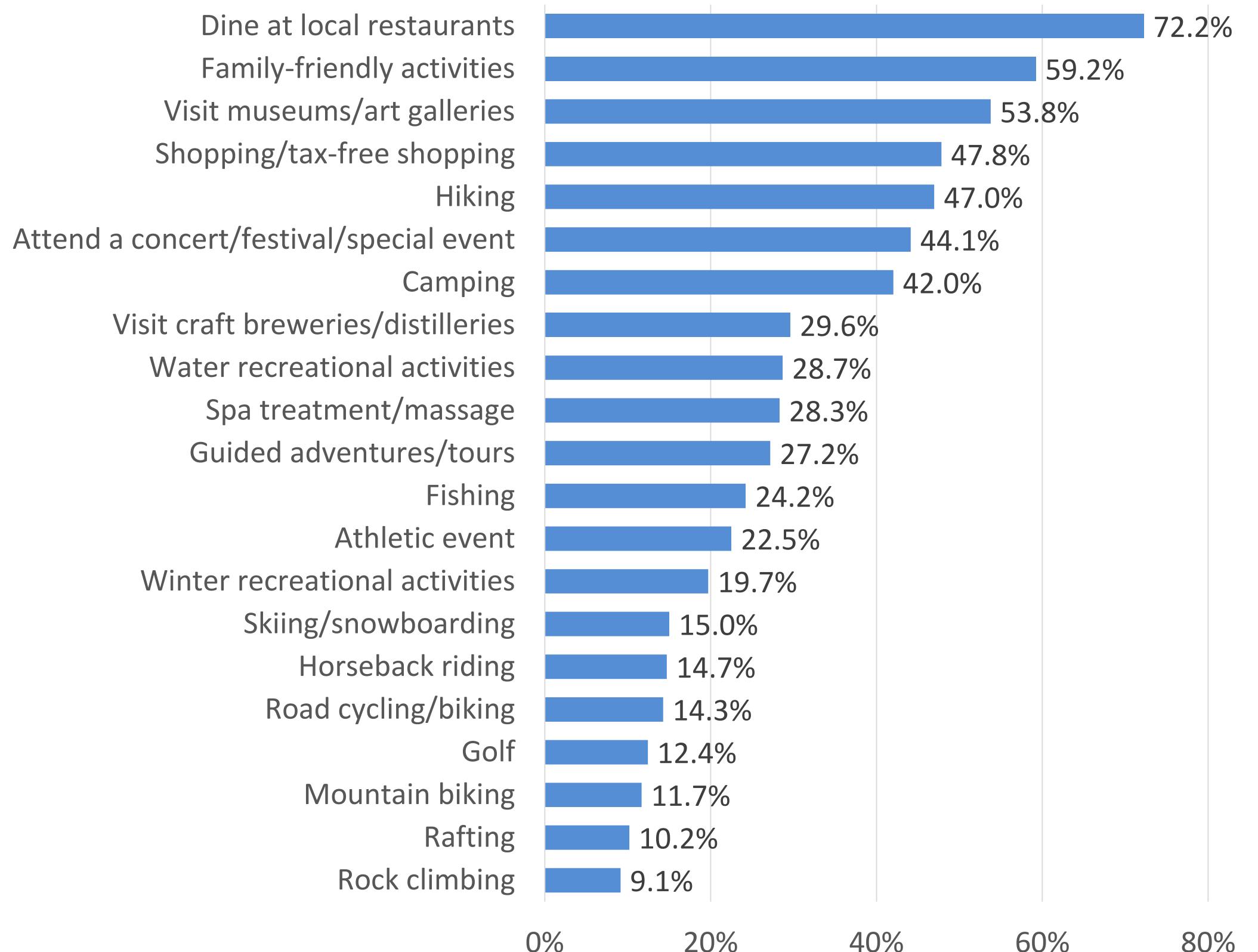


Question: How much do you agree with the following statements about leisure travel?
Base: All respondents. 1,618 responses.

Activities Participated in on a Leisure Trip

Dining in local restaurants, family-friendly activities and visiting museums are the most common activities that travelers engaged in during a leisure trip.

Figure: Activities Participated in on a Leisure Trip



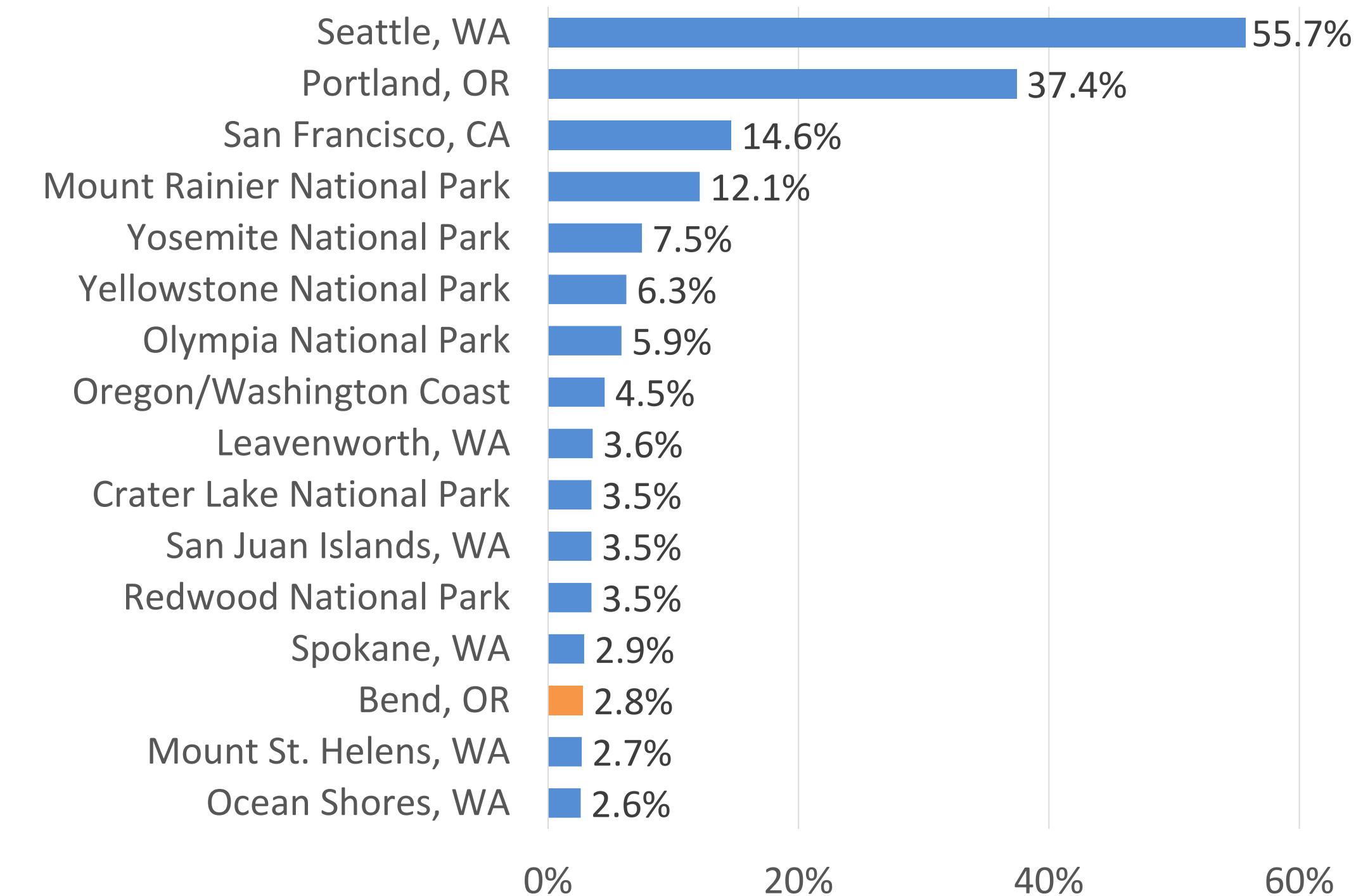
Question: Which of the following have you participated in as part of a leisure trip in the past 3 years? Base: All respondents. 1,618 responses.

CENTRAL OREGON'S COMPETITIVE SITUATION

Pacific Northwest Travel Destinations (unaided)

Large metropolitan cities and National Parks capture much of the initial demand for destinations in the Pacific Northwest region of the U.S.

Figure: Pacific Northwest Travel Destinations



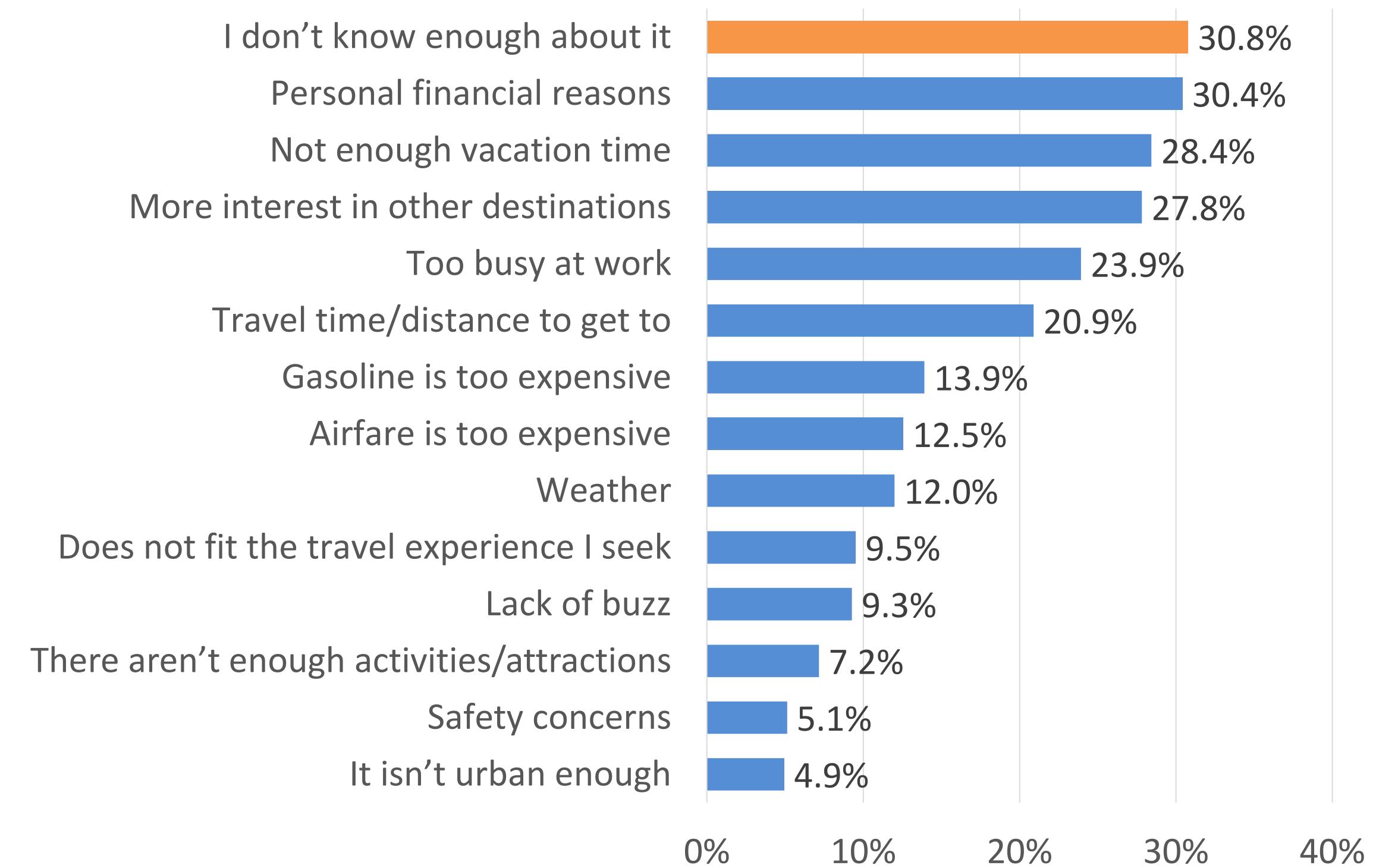
Question: Please think about travel destinations in the Pacific Northwest region of the United States (states, cities, parks, attractions, etc.) that you would MOST LIKE TO VISIT. Which are the three destinations that first come to mind? Base: All respondents. 1,618 responses.

Reasons for Not Visiting Central Oregon

A lack of knowledge about Central Oregon and personal financial concerns are the most common reasons for not visiting Central Oregon more often.

Familiar leisure travelers were more likely to cite interest in other destinations as a reason for not visiting, while unfamiliar leisure travelers were more likely to say that they don't know enough about Central Oregon.

Figure: Reasons for Not Visiting Central Oregon

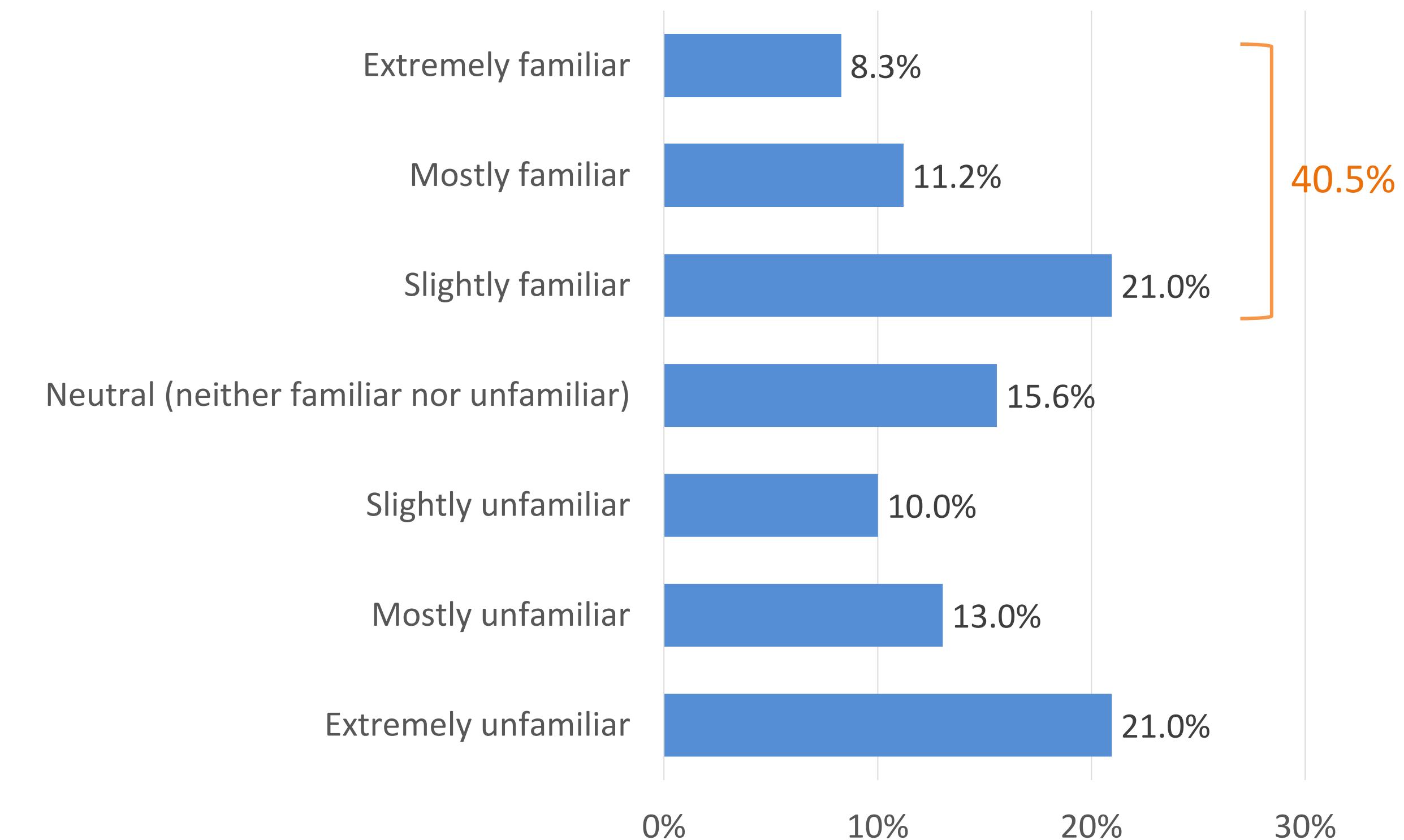


Question: Which best describes your reasons for not visiting Central Oregon more often?
(Select all that apply) Base: All respondents. 1,618 responses.

Familiarity with Central Oregon

There is a relatively low level of familiarity with Central Oregon as a leisure destination.

Figure: Familiarity with Central Oregon

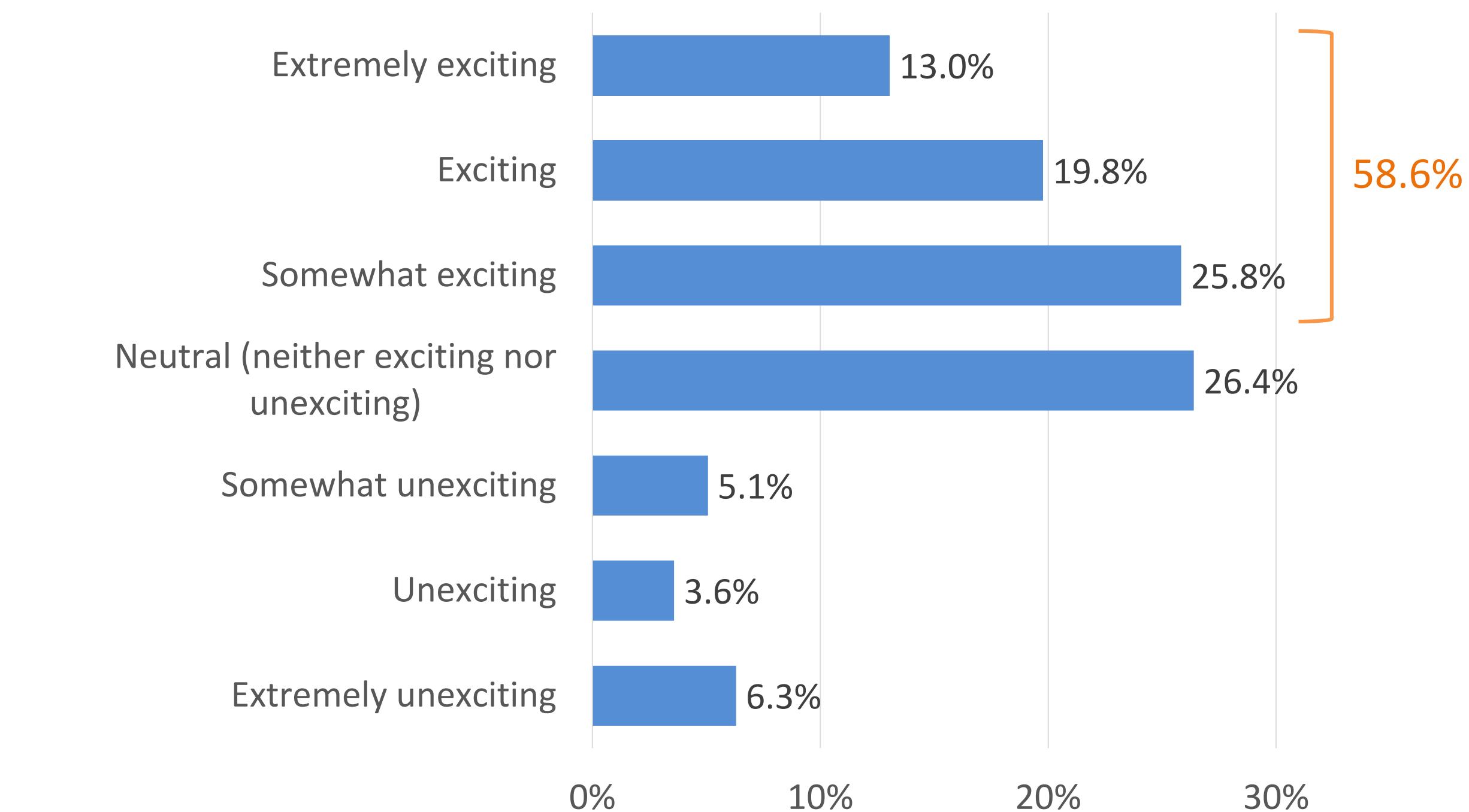


Question: How familiar are you with the attractions and things to do in Central Oregon?
(Select one) Base: All respondents. 1,618 responses.

Excitement About Central Oregon Attractions

About 60 percent of leisure travelers find Central Oregon to be an exciting destination.

Figure: Excitement About Central Oregon Attractions



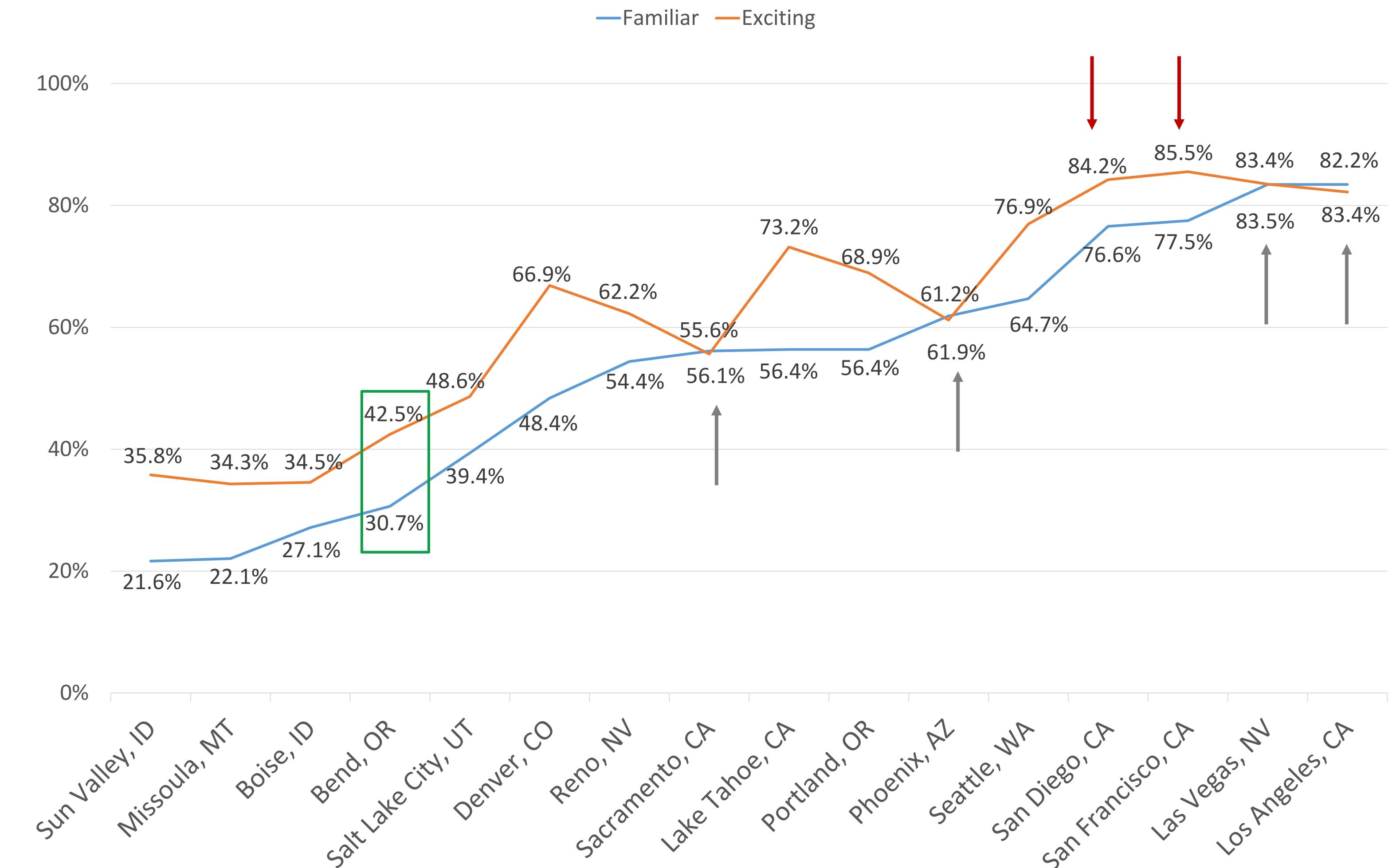
Question: Given what you currently know, how exciting do you generally find the attractions and things to see and do in Central Oregon? (Select one) Base: All respondents. 1,618 responses.

Familiarity with Western U.S. Destinations vs. Excitement about Western U.S. Destinations

Leisure travelers consider Central Oregon to have more exciting attractions and activities than their level of familiarity with the destination.

Questions: How familiar are you with the attractions and things to see and do in each of these cities? (Select one) As a leisure traveler, how exciting do you generally find the attractions and things to see and do in each of these cities? (Select one) Base: All respondents. 1,618 responses.

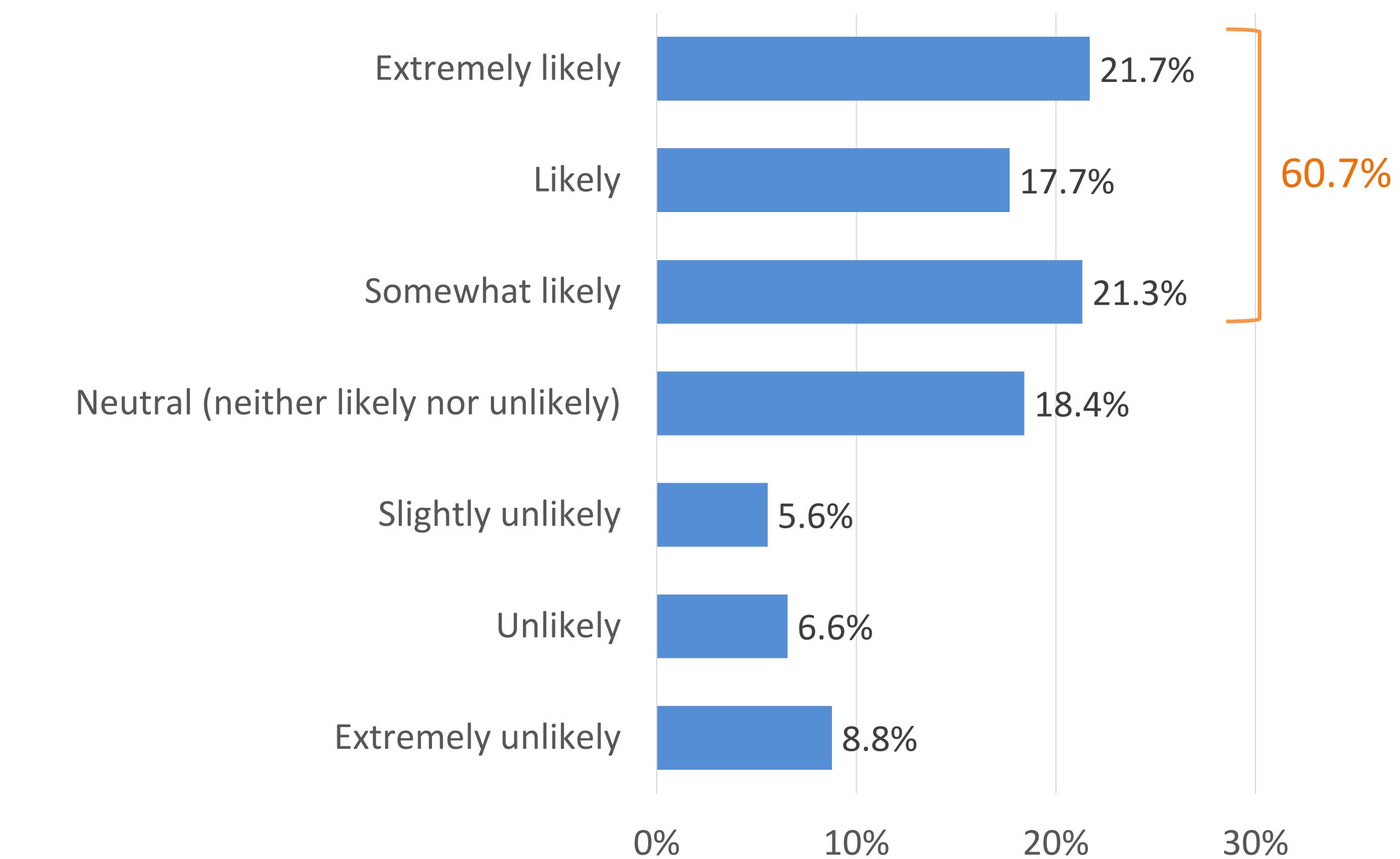
Figure: Familiarity with Western U.S. Destinations vs. Excitement about Western U.S. Destinations



Likelihood of Visiting Central Oregon

Commensurate with the level of excitement about Central Oregon's offerings, 60 percent of leisure travelers are likely to visit Central Oregon in the near future.

Figure: Likelihood of Visiting Central Oregon



Question: How likely are you to visit Central Oregon as part of a leisure trip in the NEXT FIVE YEARS? (Select one) Base: All respondents. 1,618 responses.

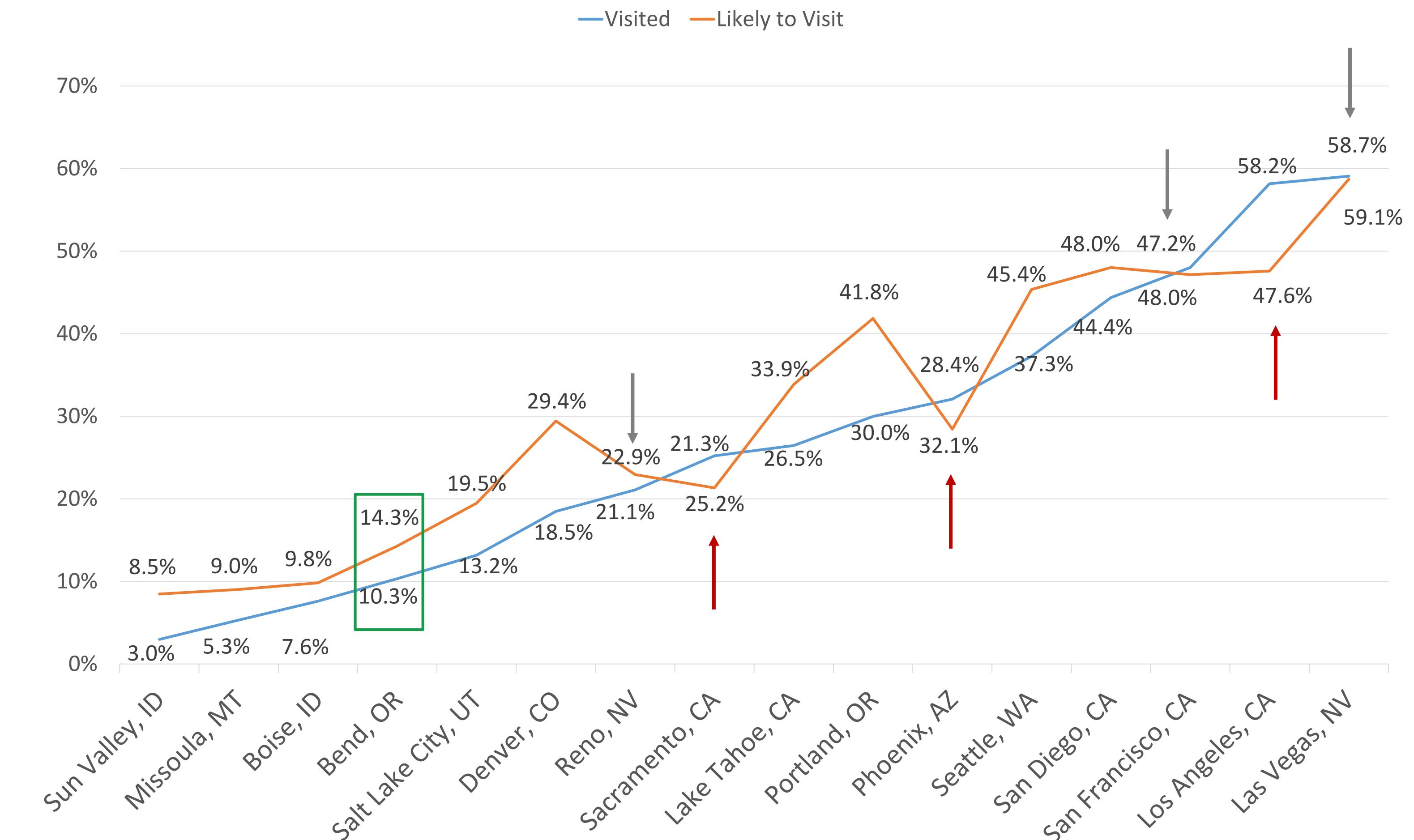
Visitation in Past 5 Years vs. Likelihood to Visit in Next 5 Years

Central Oregon has untapped aspiration as a destination.

With the exception of Los Angeles, Phoenix and Sacramento, nearly all destinations tested are more aspirational.

Questions: Which of the following cities HAVE YOU VISITED as part of a leisure trip in the PAST FIVE (5) YEARS? Which of the following cities are you LIKELY TO VISIT as part of a leisure trip in the NEXT FIVE (5) YEARS? (Select all that apply) Base: All respondents. 1,618 responses.

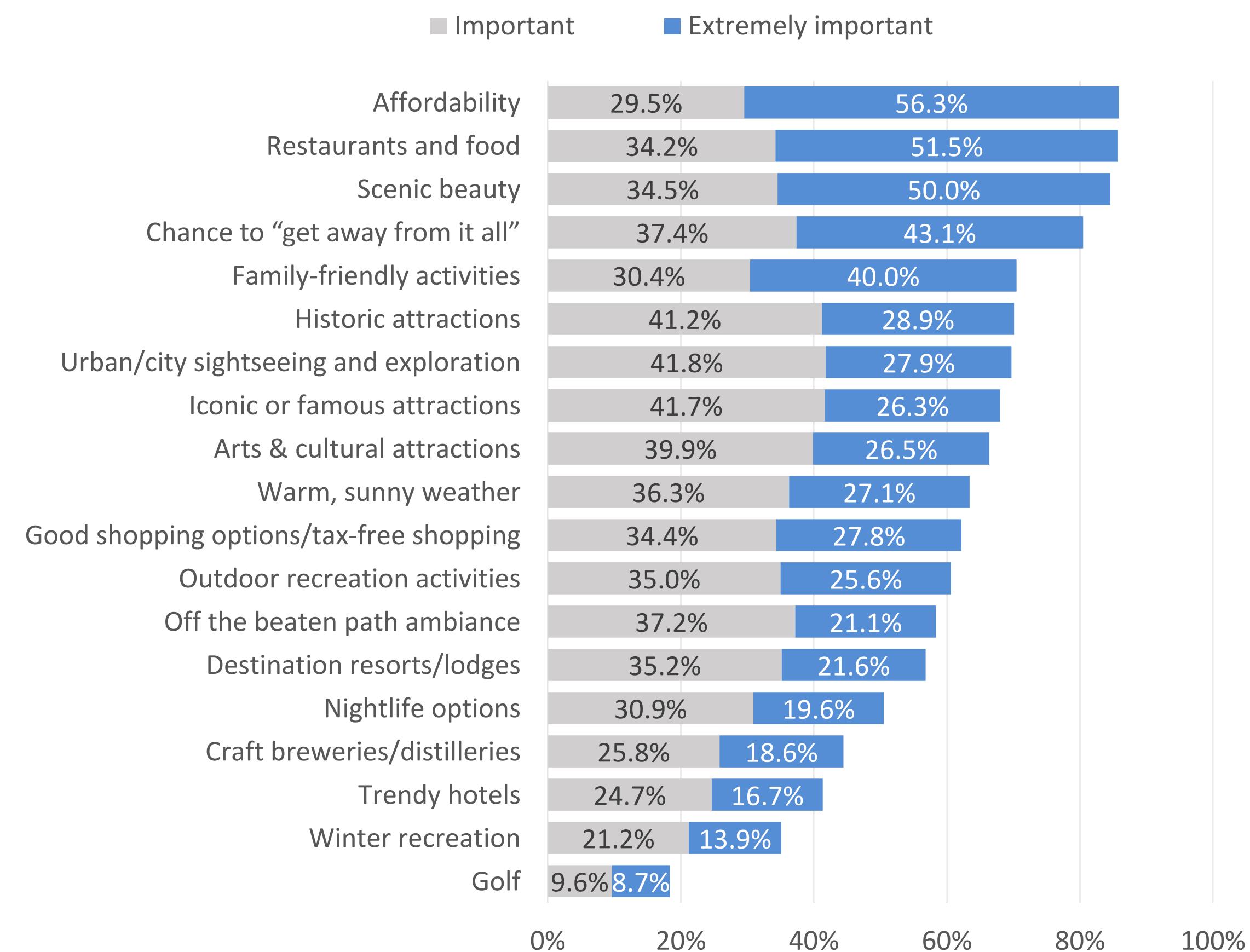
Figure: Visitation in Past 5 Years vs. Likelihood to Visit in Next 5 Years



Destination Attributes Important in Selecting Pacific Northwest Destinations

For leisure travelers, affordability, restaurants, scenic beauty and the opportunity to “get away from it all” are the most important attributes in selecting destinations to visit in the Pacific Northwest region.

Figure: Destination Attributes Important in Selecting Pacific Northwest Destinations



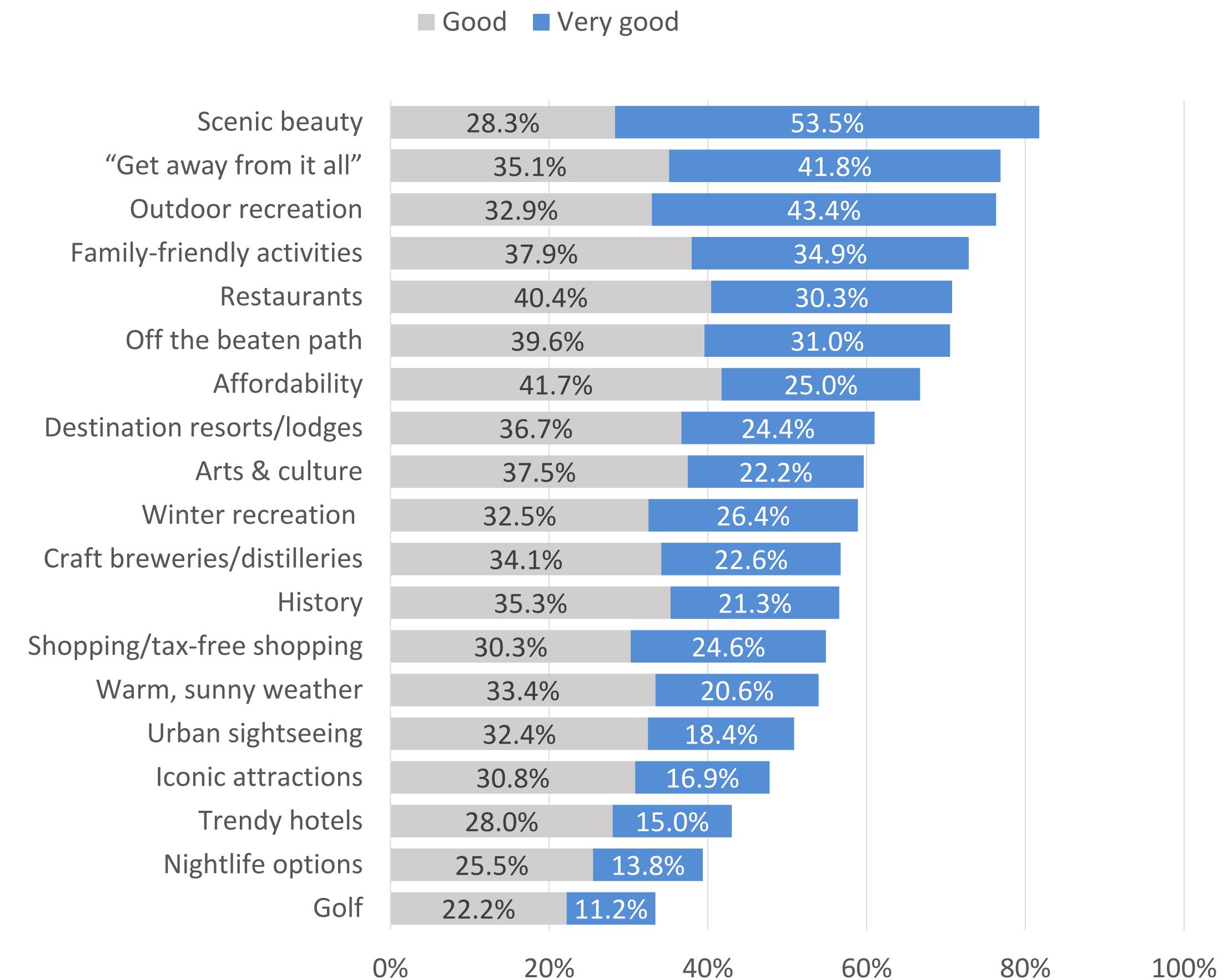
Question: Please think carefully about how you usually approach selecting the places you visit for leisure in the Pacific Northwest region. In general, how important are each of the following to how you select the places you visit? Base: All respondents. 1,618 responses.

THE CENTRAL OREGON BRAND

Rating of Central Oregon's Attributes

Central Oregon is highly rated for scenic beauty, the opportunity to “get away from it all” and outdoor recreation.

Figure: Rating of Central Oregon's Attributes



Question: Please use the scale below to evaluate each attribute of Central Oregon as a place to visit for leisure travel. Base: All respondents. 1,618 responses.

Rating of Central Oregon's Attributes—Familiar vs. Unfamiliar Leisure Travelers

In general, leisure travelers familiar with Central Oregon rated the destination higher for all destination attributes tested compared to unfamiliar leisure travelers.

The largest differences were in ratings of Central Oregon's iconic attractions and nightlife. Over 30 percent more of familiar leisure travelers than unfamiliar leisure travelers rated Central Oregon "good" or "very good" for iconic attractions and nightlife.

Figure: Rating of Central Oregon's Attributes—Familiar vs. Unfamiliar

	Familiar (% rating each attribute good or very good)	Unfamiliar (% rating each attribute good or very good)
Scenic beauty	92.7%	75.8%
Outdoor recreation activities	87.6%	71.6%
Chance to "get away from it all"	86.7%	71.2%
Family-friendly activities	85.5%	65.0%
Restaurants and food	84.7%	60.4%
Off the beaten path ambiance	84.3%	61.1%
Affordability	82.3%	55.3%
Destination resorts and/or lodges	77.1%	49.2%
Arts & cultural attractions	75.4%	49.0%
Winter recreation	74.6%	48.0%
Historic attractions	73.9%	45.5%
Craft breweries/distilleries	72.0%	44.8%
Tax-free shopping	71.1%	43.0%
Warm, sunny weather	69.1%	43.0%
Iconic or famous attractions	69.0%	31.7%
Urban/city sightseeing and exploration	67.0%	40.0%
Trendy hotels	59.6%	30.6%
Nightlife options	58.4%	25.1%
Golf	49.8%	20.8%

Question: Please use the scale below to evaluate each attribute of Central Oregon as a place to visit for leisure travel. Base: All respondents. 1,618 responses.

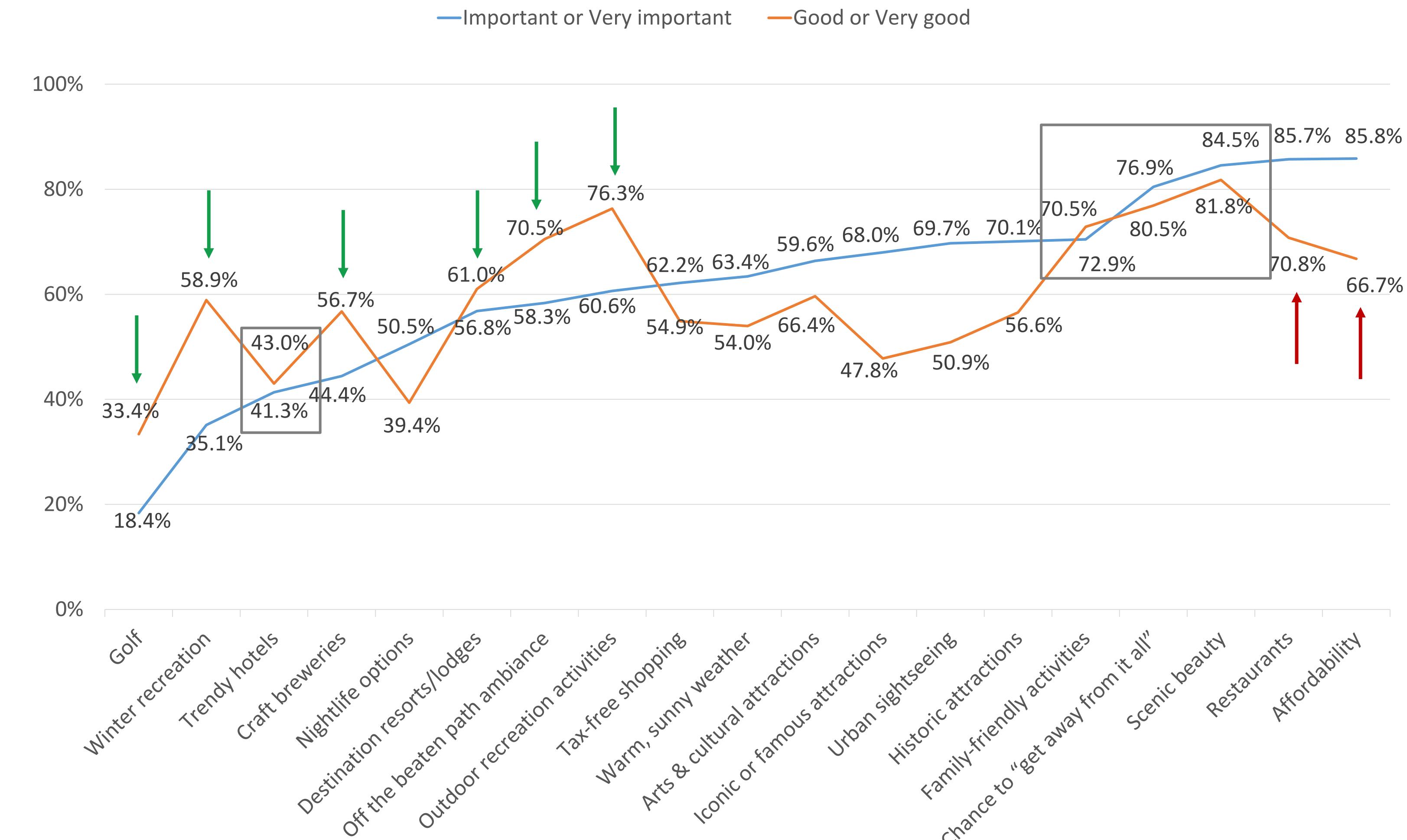
Importance of Destination Attributes vs. Rating of Central Oregon's Attributes

Central Oregon performs extremely well for a number of destination attributes—outpacing the volume of travelers in which these attributes are important.

For more urban and other strongly valued attributes, however, Central Oregon's evaluation falls behind.

Questions: Please use the scale below to evaluate each attribute of Central Oregon as a place to visit for leisure travel. Please think carefully about how you usually approach selecting the places you visit for leisure in the Pacific Northwest region. In general, how important are each of the following to how you select the places you visit? Base: All respondents. 1,618 responses.

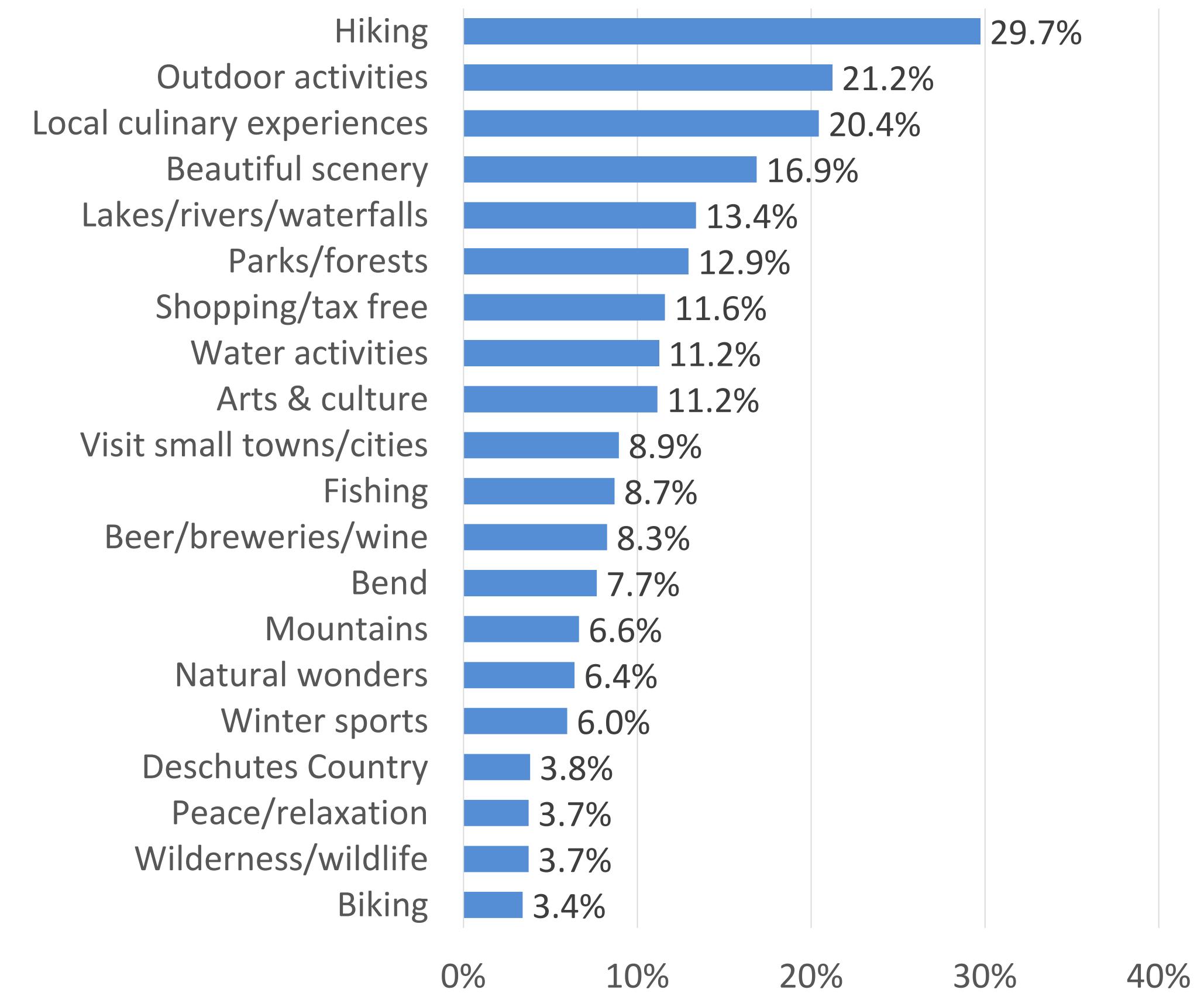
Figure: Importance of Destination Attributes vs. Rating of Central Oregon's Attributes



Central Oregon Attractions & Experiences (unaided)

Hiking is the top-of-mind experience that Central Oregon offers visitors.

Figure: Central Oregon Attractions & Experiences (unaided)

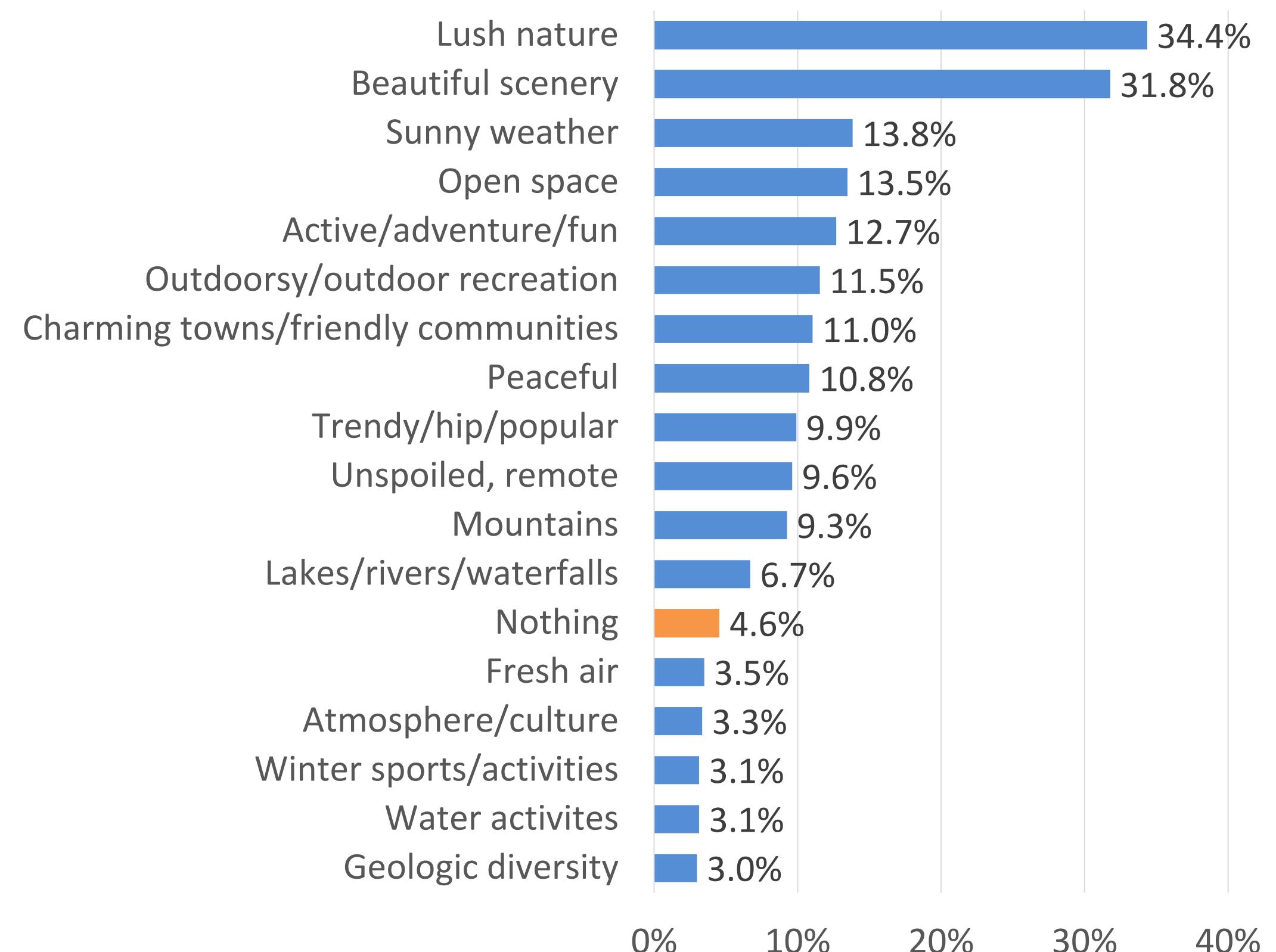


Question: Thinking of Central Oregon as a place to visit, what are the top attractions, places to visit, things to do and experiences Central Oregon offers you as a visitor? Base: All respondents. 1,618 responses.

Descriptions of Central Oregon (unaided)

Central Oregon is commonly described in terms of nature.

Figure: Descriptions of Central Oregon (unaided)



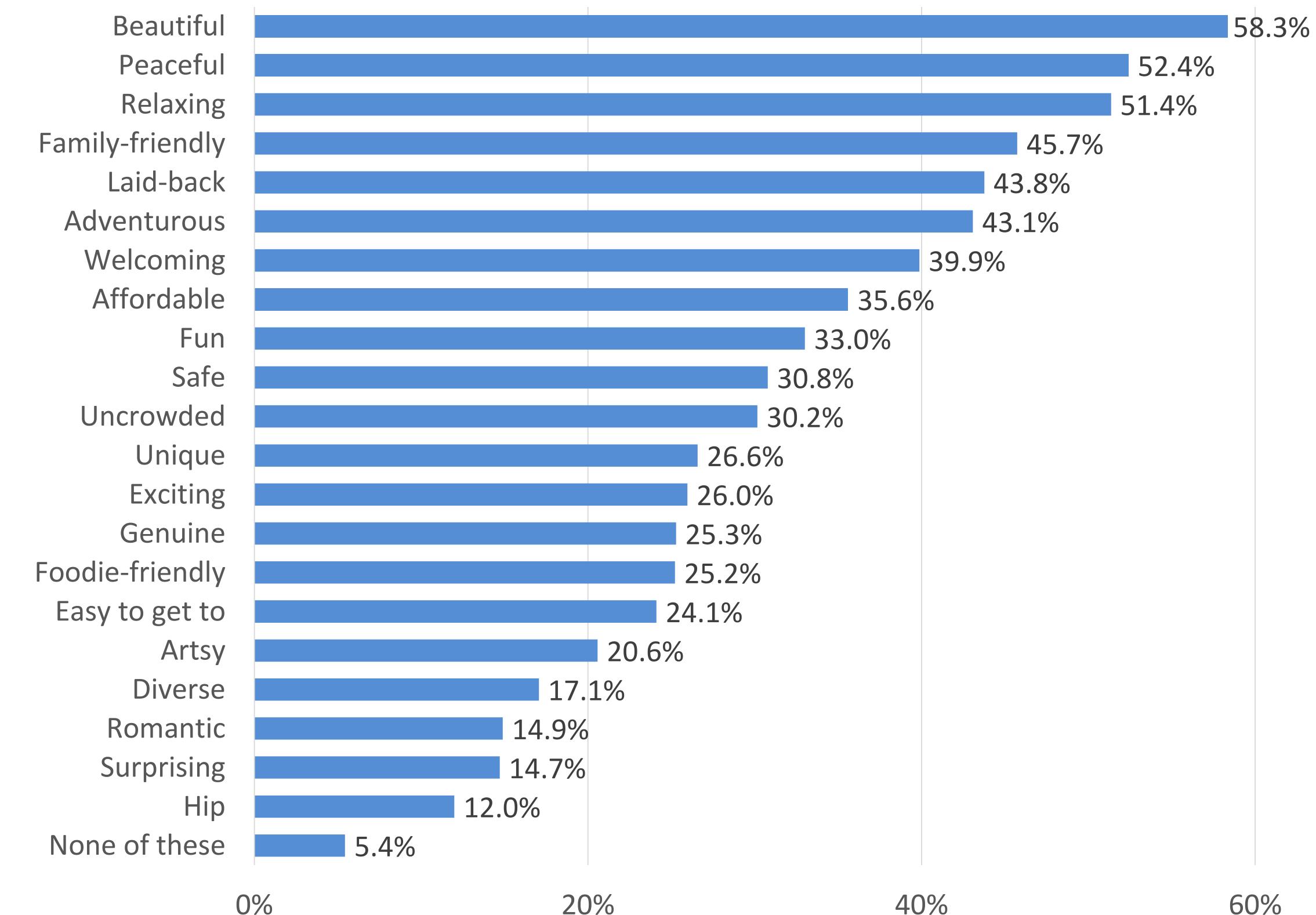
Question: Please picture Central Oregon in your mind—and think of the SPECIFIC WORDS that describe Central Oregon. Please write in the first adjectives or descriptive words or phrases that come to mind. Base: All respondents. 1,618 responses.

Descriptions of Central Oregon (positive—aided)

Central Oregon is perceived to be a beautiful, peaceful and relaxing destination.

In general, familiar leisure travelers were more likely to select these positive descriptors of Central Oregon tested compared to unfamiliar leisure travelers.

Figure: Descriptions of Central Oregon (positive—aided)



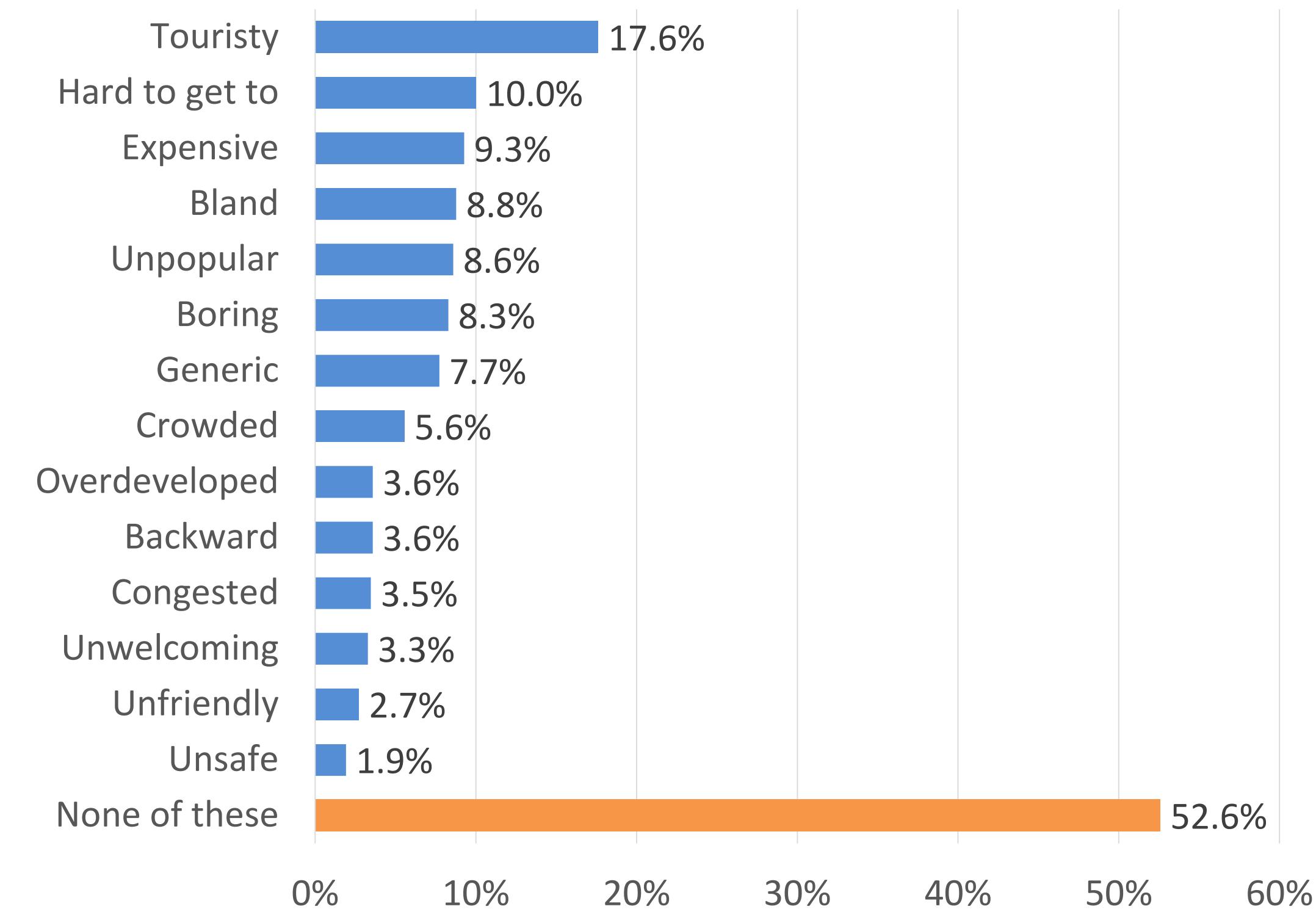
Question: Which of these words or phrases accurately describe Central Oregon? (Select all that apply)
Base: All respondents. 1,618 responses.

Descriptions of Central Oregon (negative—aided)

Central Oregon is seen as touristy by some leisure travelers.

While both familiar and unfamiliar leisure travelers consider Central Oregon to be hard to get to, familiar leisure travelers were more likely to describe the destination as touristy and expensive, while unfamiliar leisure travelers were more likely to select the words bland, boring and unpopular.

Figure: Descriptions of Central Oregon (negative—aided)

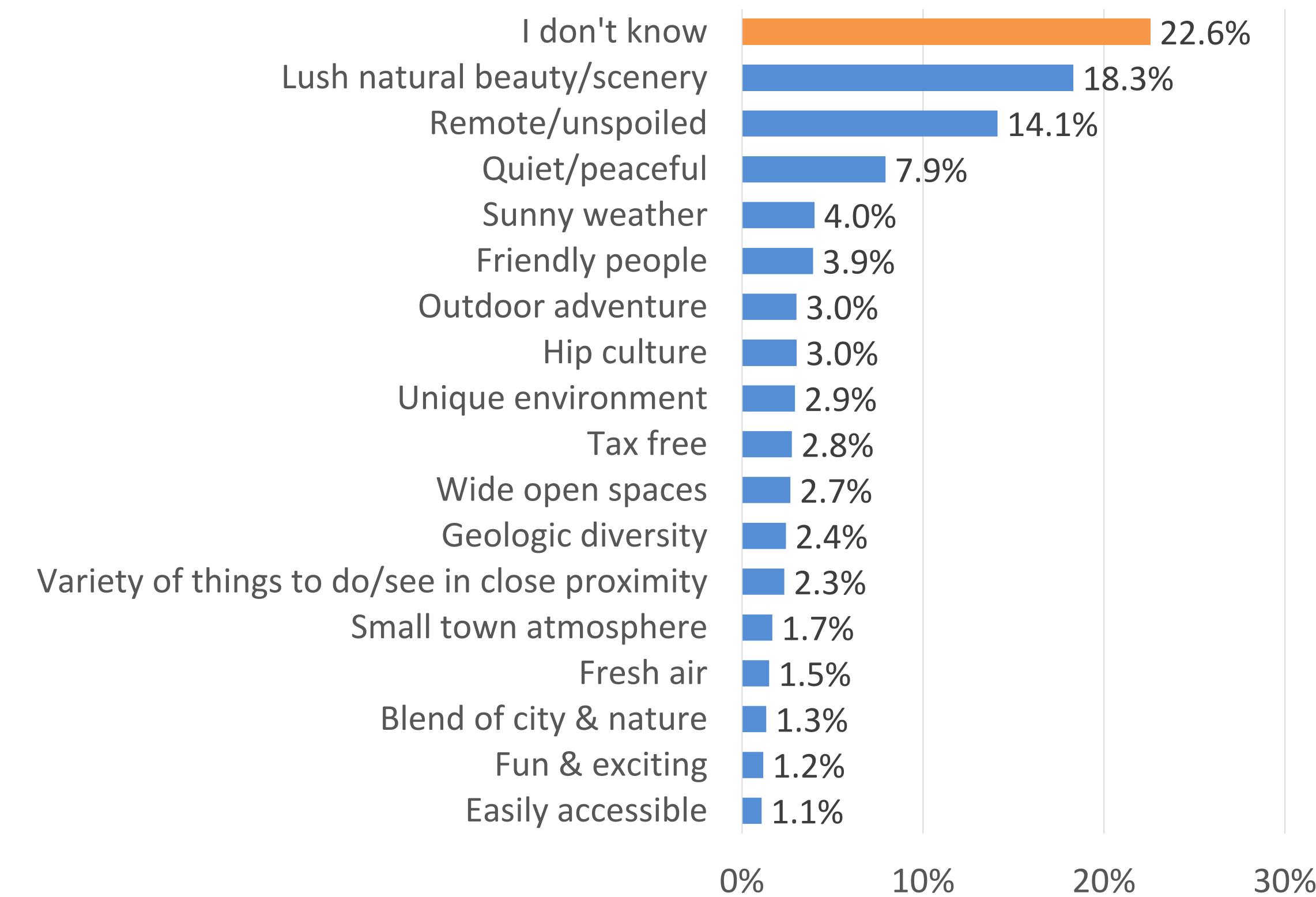


Question: Which of these words or phrases accurately describe Central Oregon? (Select all that apply)
Base: All respondents. 1,618 responses.

Differences Between Central Oregon and Other Pacific Northwest Destinations (unaided)

Lush nature and scenic beauty is the primary attribute that travelers currently understand distinguishes Central Oregon from other destinations in the Pacific Northwest region.

Figure: Differences between Central Oregon and Other Pacific Northwest Destinations (unaided)



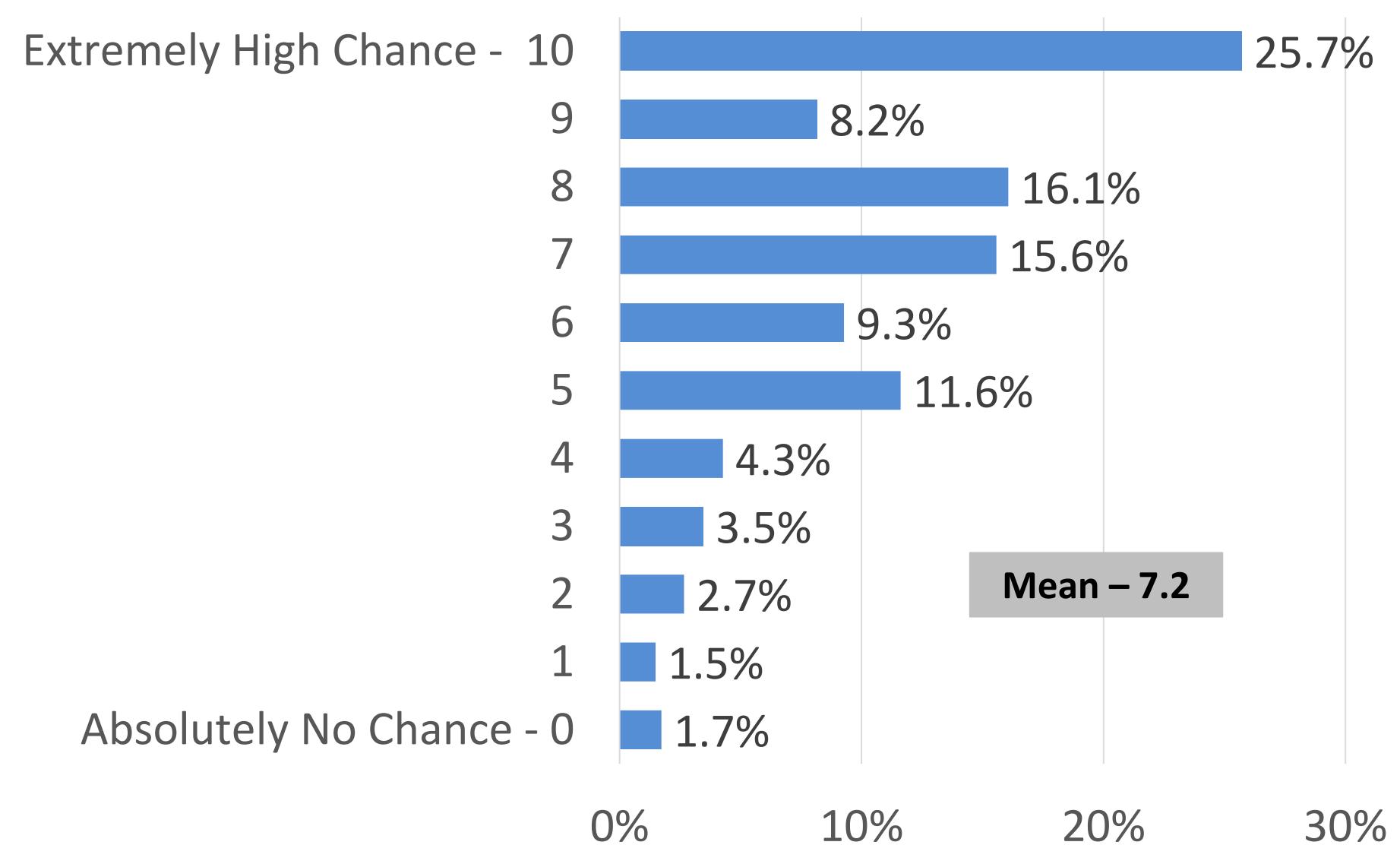
Question: In a few words, what makes Central Oregon DIFFERENT FROM OTHER DESTINATIONS in the Pacific Northwest region of the U.S.? Base: All respondents. 1,618 responses.

CENTRAL OREGON'S HIGH POTENTIAL VISITORS

Likelihood of Traveling to the Pacific Northwest During Summer & Winter Months

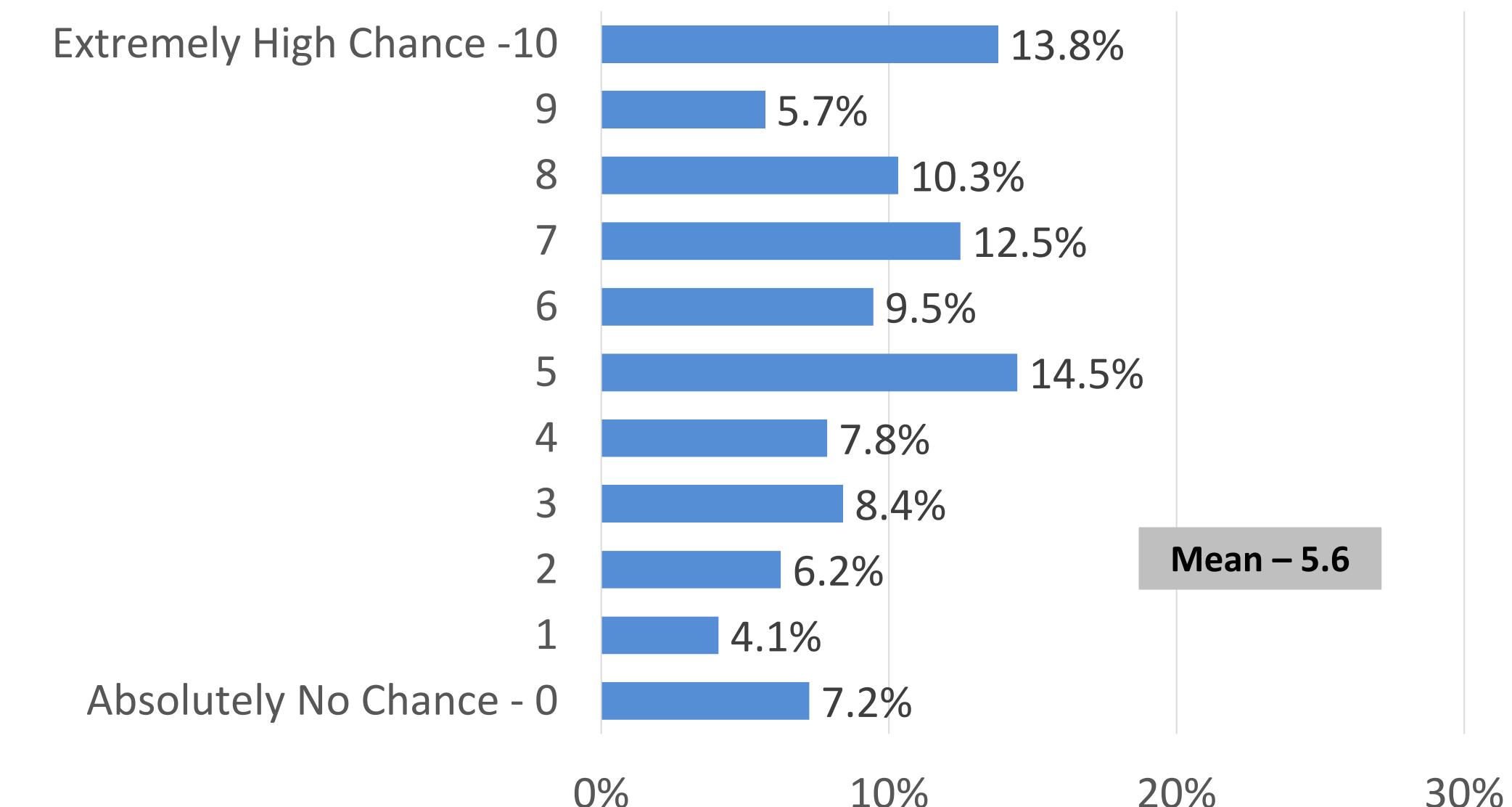
Leisure travelers are more likely to travel to the Pacific Northwest region during the summer. Using an eleven-point scale from “0 – Absolutely No Chance” to “10 – Extremely High Chance,” leisure travelers were asked to rate how likely they are to travel to the Pacific Northwest region for leisure during the warm weather months of April – October and the winter months of November – March. On average, travelers rated their likelihood of visiting the Pacific Northwest in summer 7.2, while their likelihood of visiting in the winter is 5.6.

Figure: Likelihood of Traveling During Summer Months



Question: In the next two years, how likely are you to travel to (or within) the Pacific Northwest region for leisure during the warm weather months (April-October)? Base: All respondents. 1,618 responses.

Figure: Likelihood of Traveling During Winter Months

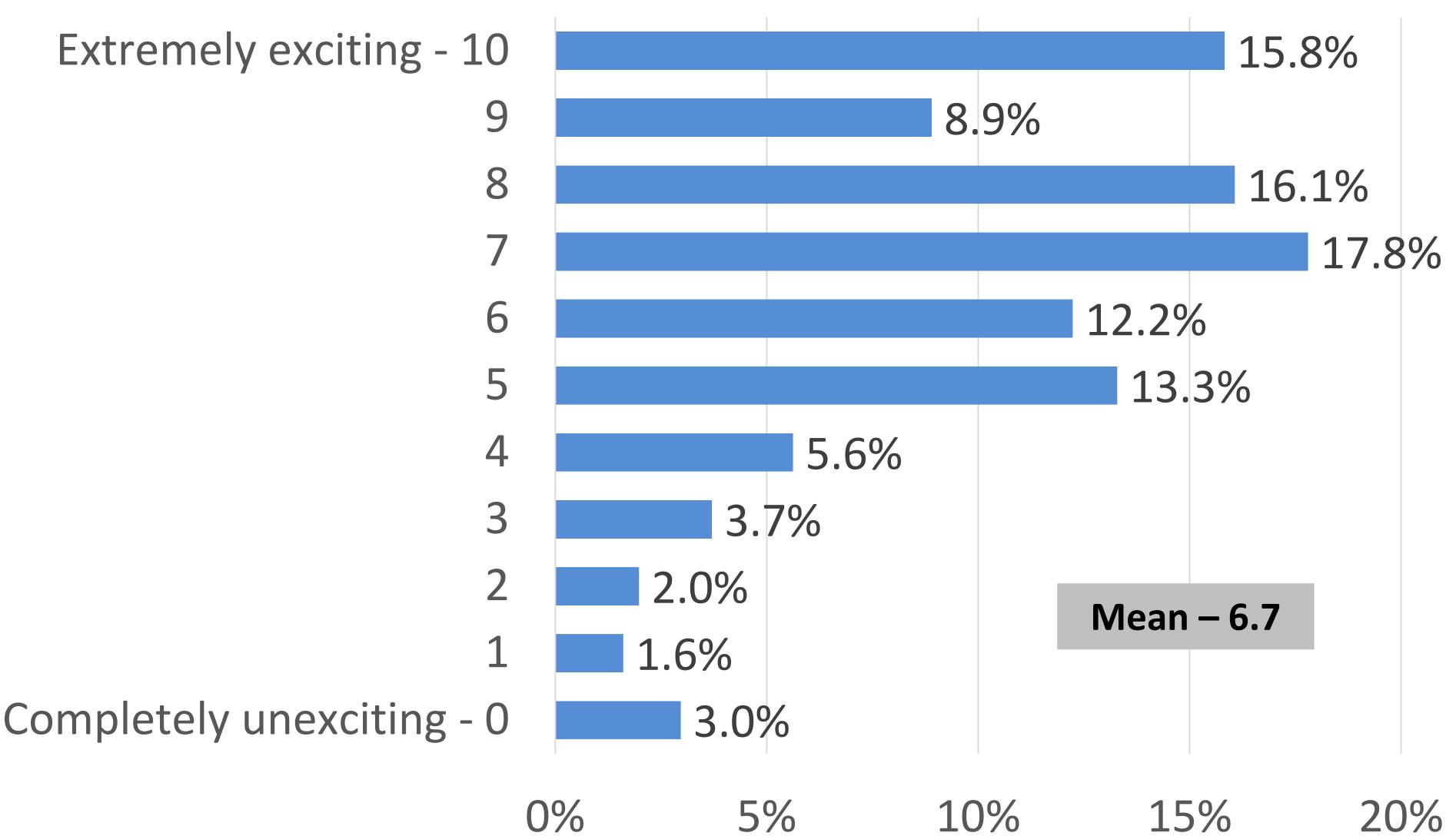


Question: In the next two years, how likely are you to travel to (or within) the Pacific Northwest region for leisure during the winter months (November-March)? Base: All respondents. 1,618 responses.

Excitement About Traveling to Central Oregon During Summer & Winter Months

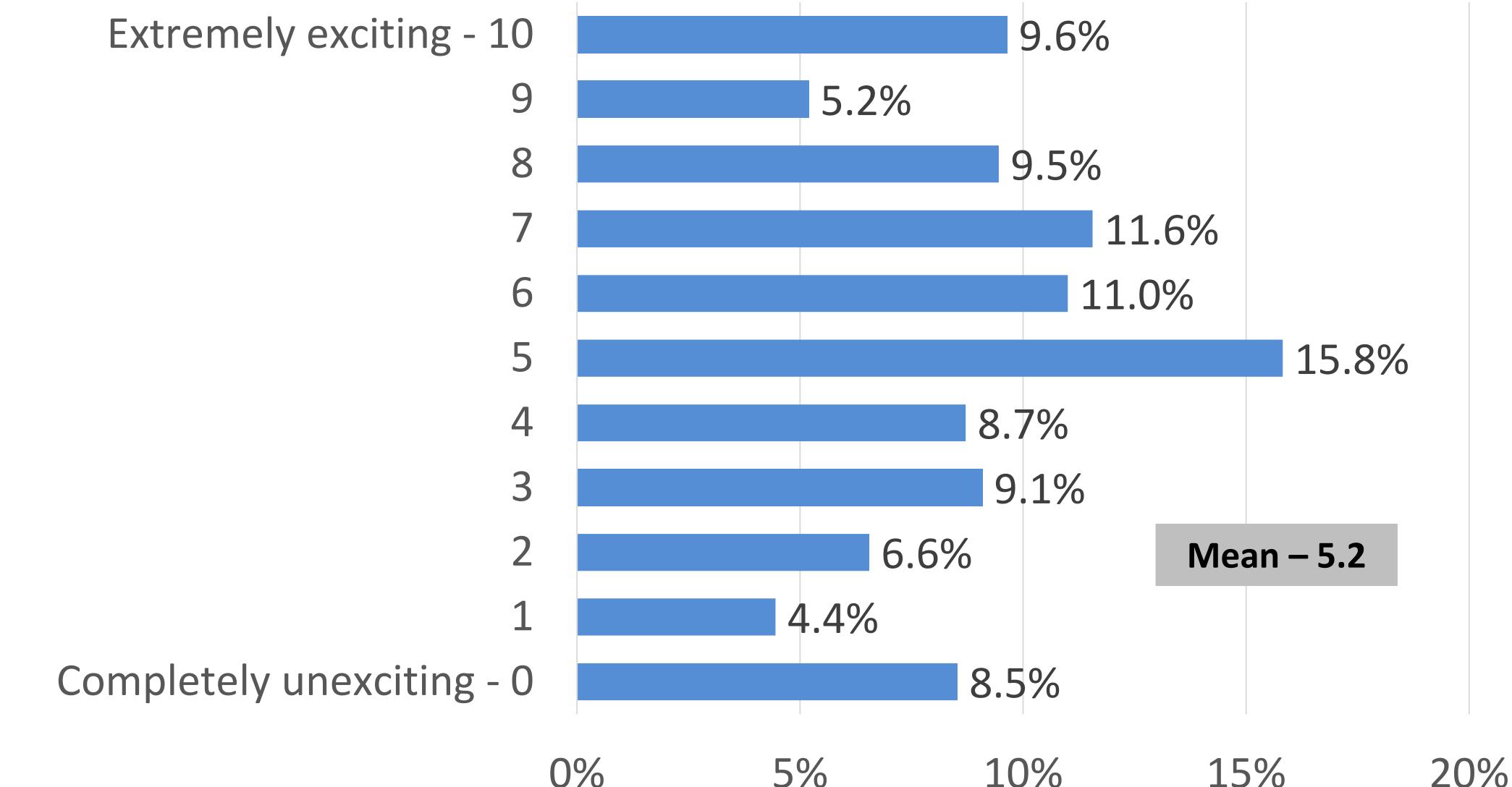
Leisure travelers are more excited about taking a vacation to Central Oregon during the summer. Using another eleven-point scale, leisure travelers were asked to rate their level of excitement about taking a vacation that includes travel to Central Oregon during the summer and winter. On average, travelers rated their excitement about visiting Central Oregon in the summer 6.7, while their average excitement rating for visiting in winter is 5.2.

Figure: Excitement About Traveling During Summer Months



Question: How exciting do you find the idea of taking a vacation that includes travel to Central Oregon during the WARM WEATHER MONTHS (April-October)? Base: All respondents. 1,618 responses.

Figure: Excitement About Traveling During Winter Months



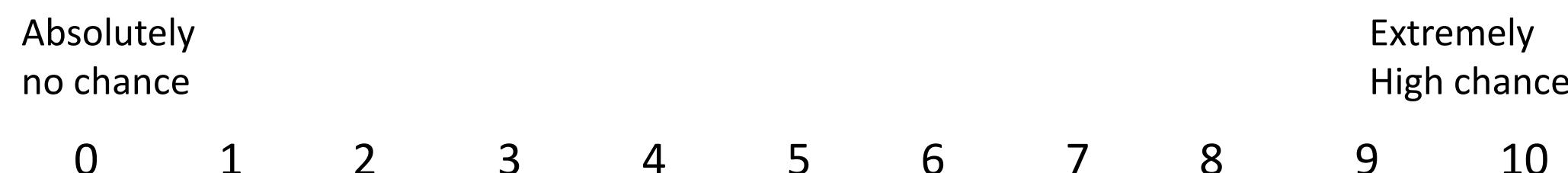
Question: How exciting do you find the idea of taking a vacation that includes travel to Central Oregon during the WINTER MONTHS (November-March)? Base: All respondents. 1,618 responses.

Definition of a High Potential Visitor

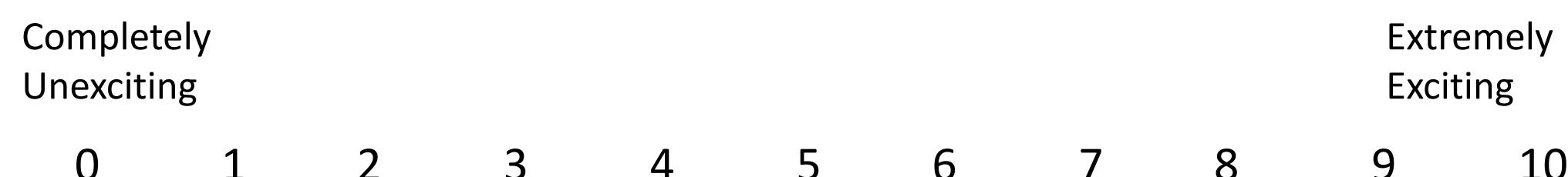
Calculating the Central Oregon High Potential Visitor Index

The visitation index for individual travelers is simply the product of the scores given for two questions: likelihood of visiting the Pacific Northwest region and excitement level Central Oregon generates in the respondent. A higher score (on a scale from 0-100) indicates a higher likelihood to visit in the near future.

A. In the next two years, how likely are you to travel to (or within) the Pacific Northwest Region for leisure during the warm weather months (April-October)/winter months (November-March)?



B. How exciting do you find the idea of taking a vacation that includes travel to Central Oregon during the warm weather months (April-October)/winter months (November-March)?



Index Value for individual respondents = A * B

High Potential Summer Visitor:

- Travelers who have a high potential to visit the Pacific Northwest region during the summer in the next two years, and consider Central Oregon to be an exciting summer travel destination
- Central Oregon Visitor Index score from 75 to 100

High Potential Winter Visitor:

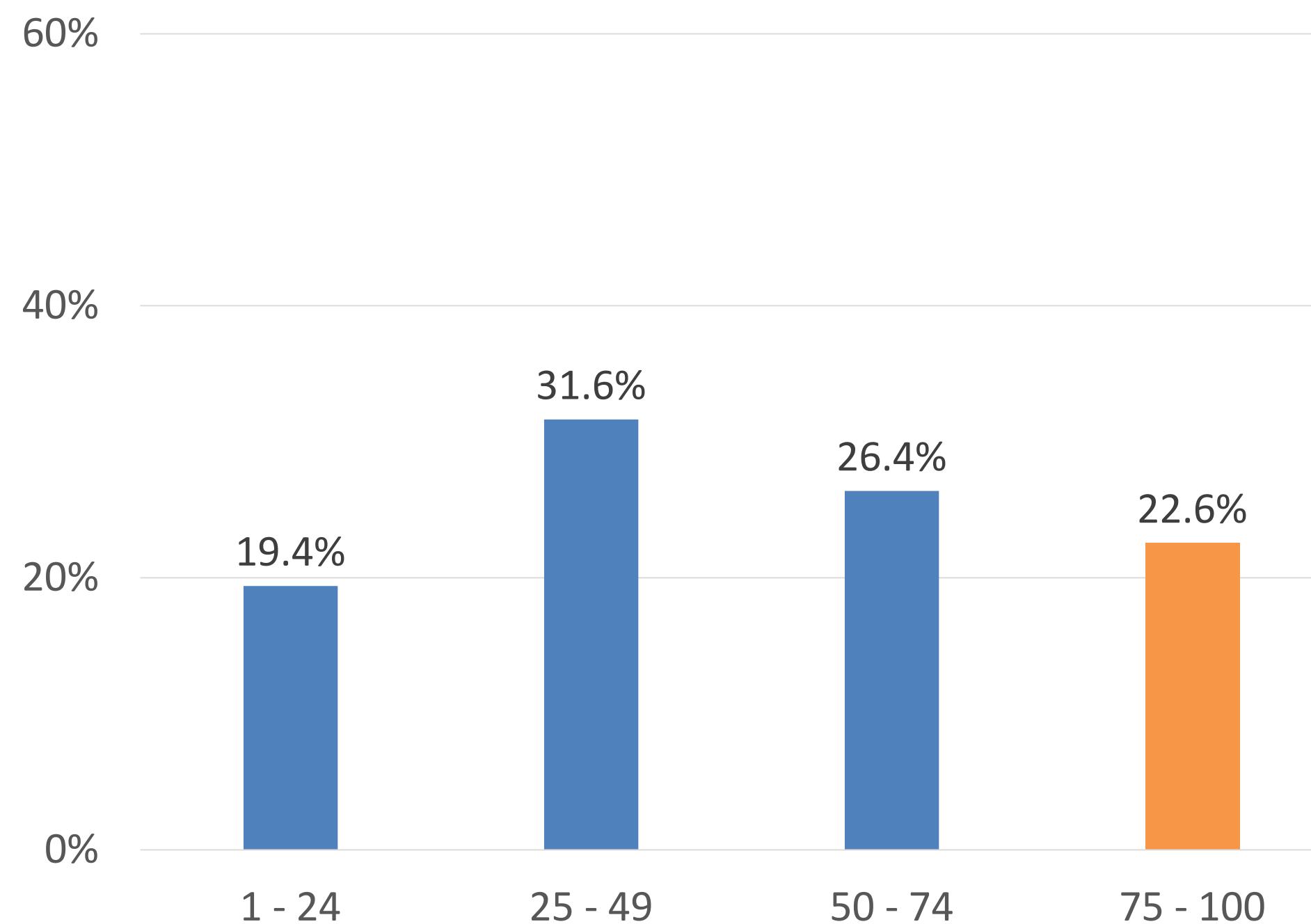
- Travelers who have a high potential to visit the region during winter in the next two years, and consider Central Oregon to be an exciting winter travel destination
- Central Oregon Visitor Index score from 75 to 100



Incidence of High Potential Visitors: Summer vs. Winter

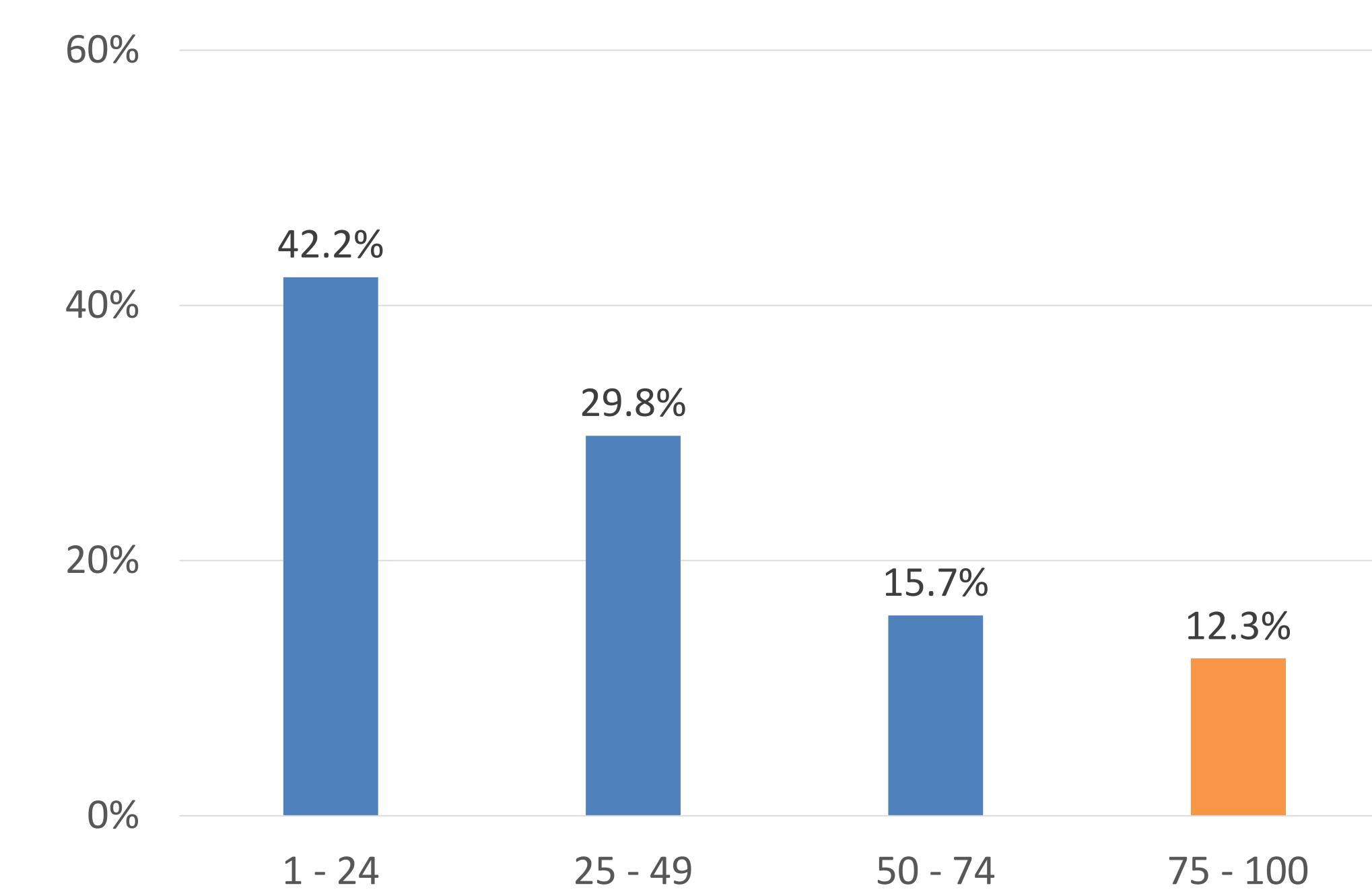
Central Oregon's tourism potential is greater in the warm season than the winter. The charts below show the incidence of high potential visitors (for each season) by the Central Oregon Visitor Index score. It is clear that from a sheer volume perspective, Central Oregon's potential as a leisure travel destination is greater in the summer compared to winter (22.6% vs. 12.3%, respectively). Nevertheless, one-quarter of leisure travelers consider Central Oregon to be an exciting winter travel destination (24.3% who rated Central Oregon an 8, 9 or 10 on the ten-point excitement scale).

Figure: Incidence of High Potential Summer Visitors



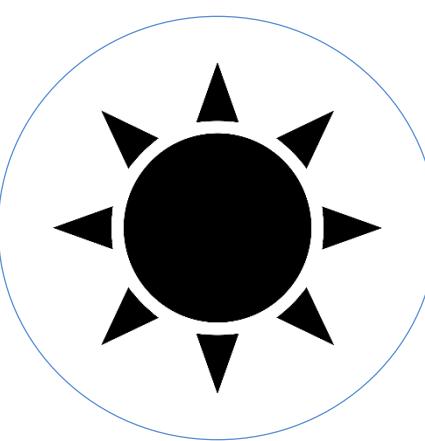
Central Oregon Summer Visitor Index score. Base: All respondents. 1,618 responses.

Figure: Incidence of High Potential Winter Visitors



Central Oregon Winter Visitor Index score. Base: All respondents. 1,618 responses.

Market Potential: Summer



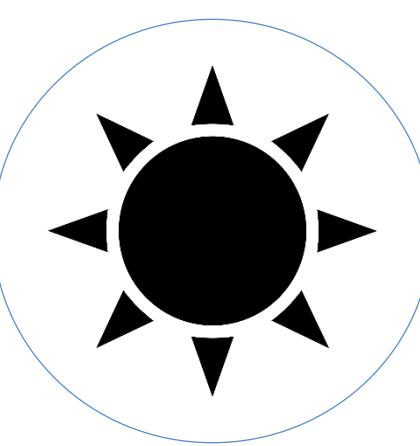
Los Angeles appears to be Central Oregon's strongest high potential market for the warm season. The table at right shows the percent of high potential visitors, number of households and the potential market size (number of households X percent of high potential visitors) for each market studied in this research. In order to identify the market areas of highest potential for Central Oregon, Destination Analysts' uses the approach of looking at the proportion of residents of a metropolitan area classified as high potential. From this approach, the strongest warm season high potential market is Seattle (30.9%).

Another valuable perspective is to estimate the absolute volume of high potential visitors in each market. Using the incidence figures for each market studied, and the estimated number of households in each market, a gross market size potential is calculated for each market. From this approach, Los Angeles emerges as the market with the largest number of high potential summer visitors to Central Oregon. Although Seattle has a higher incidence of high potential summer visitors than Los Angeles (30.9% vs. 24.5%), given the size of the Los Angeles market, more households can be reached.

Figure: Incidence of High Potential Summer Visitors by Market

WARM SEASON	High Potential Visitors (%)	Households	Market Size (Households)
Los Angeles	24.5%	5,476,830	1,341,823
Seattle	30.9%	1,808,530	558,836
San Francisco	18.6%	2,488,090	462,785
Phoenix	16.3%	1,890,100	308,086

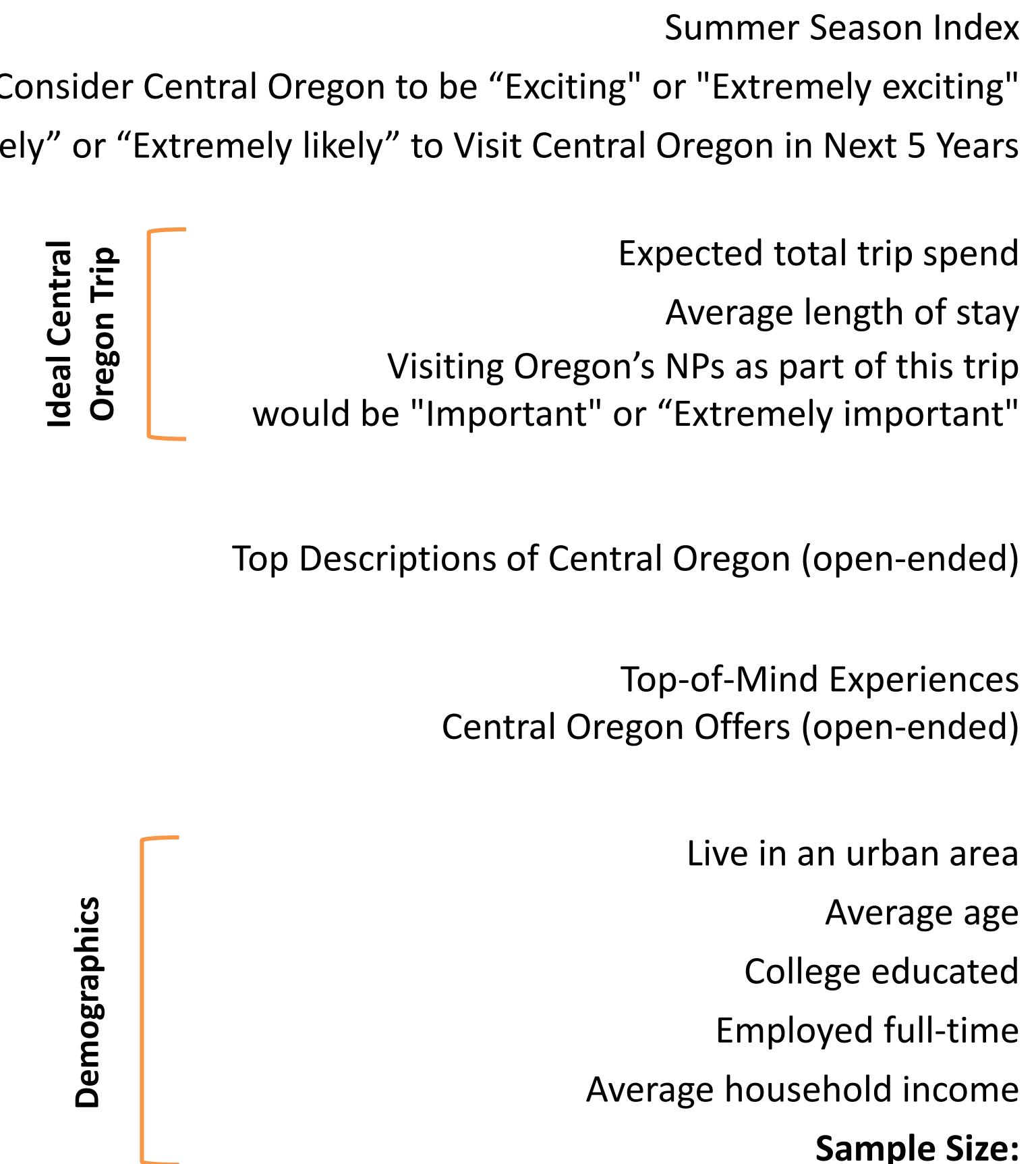
The High Potential Summer Visitor



The High Potential Summer Visitor:

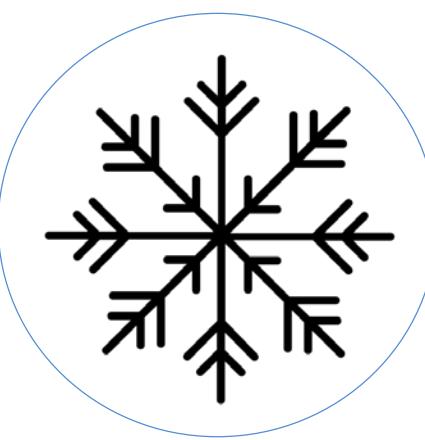
- More likely to describe Central Oregon as having "beautiful scenery" compared to high potential winter visitors (34.8% vs. 30.0%).
- More likely to associate Central Oregon with hiking compared to high potential winter visitors (27.4% vs. 21.1%).
- On average, older than high potential winter visitors (38.3 vs. 33.7).

Figure: Profile of the High Potential Summer Visitor



High Potential Warm Season Visitor
92.3
62.7%
73.4%
\$1,854
6.4 days
85.2%
1. Beautiful scenery (34.8%)
2. Lush nature (31.7%)
3. Adventure (16.6%)
1. Hiking (27.4%)
2. Culinary experiences (20.9%)
3. Outdoor recreation (19.6%)
52.3%
38.3
47.1%
58.1%
\$74,964
365

Market Potential: Winter



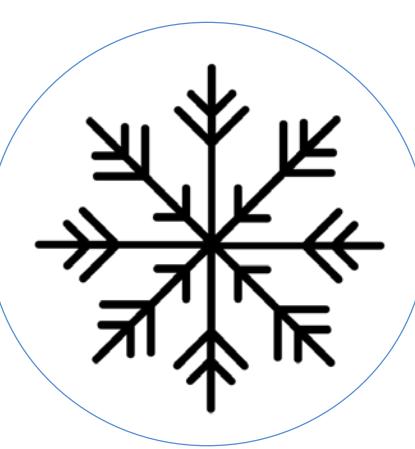
Los Angeles is Central Oregon's strongest high potential market for winter.

The table at right shows the estimated winter market size for each market studied, ranked from highest to lowest by market size. In looking at the ordinal ranking, the top market for the warm season and winter is similar: Los Angeles. However, there is a slight shift in looking at the ordinal ranking of Seattle and San Francisco compared to market potential for summer. While Seattle was the second market for high potential summer visitors to Central Oregon, it moves to third place for winter potential. Nevertheless, San Francisco's market size for winter only slightly surpasses that of Seattle (258,761 vs. 258,620).

Figure: Incidence of High Potential Winter Visitors by Market

WINTER SEASON	High Potential Visitors (%)	Households	Market Size (Households)
Los Angeles	16.6%	5,476,830	909,154
San Francisco	10.4%	2,488,090	258,761
Seattle	14.3%	1,808,530	258,620
Phoenix	7.9%	1,890,100	149,318

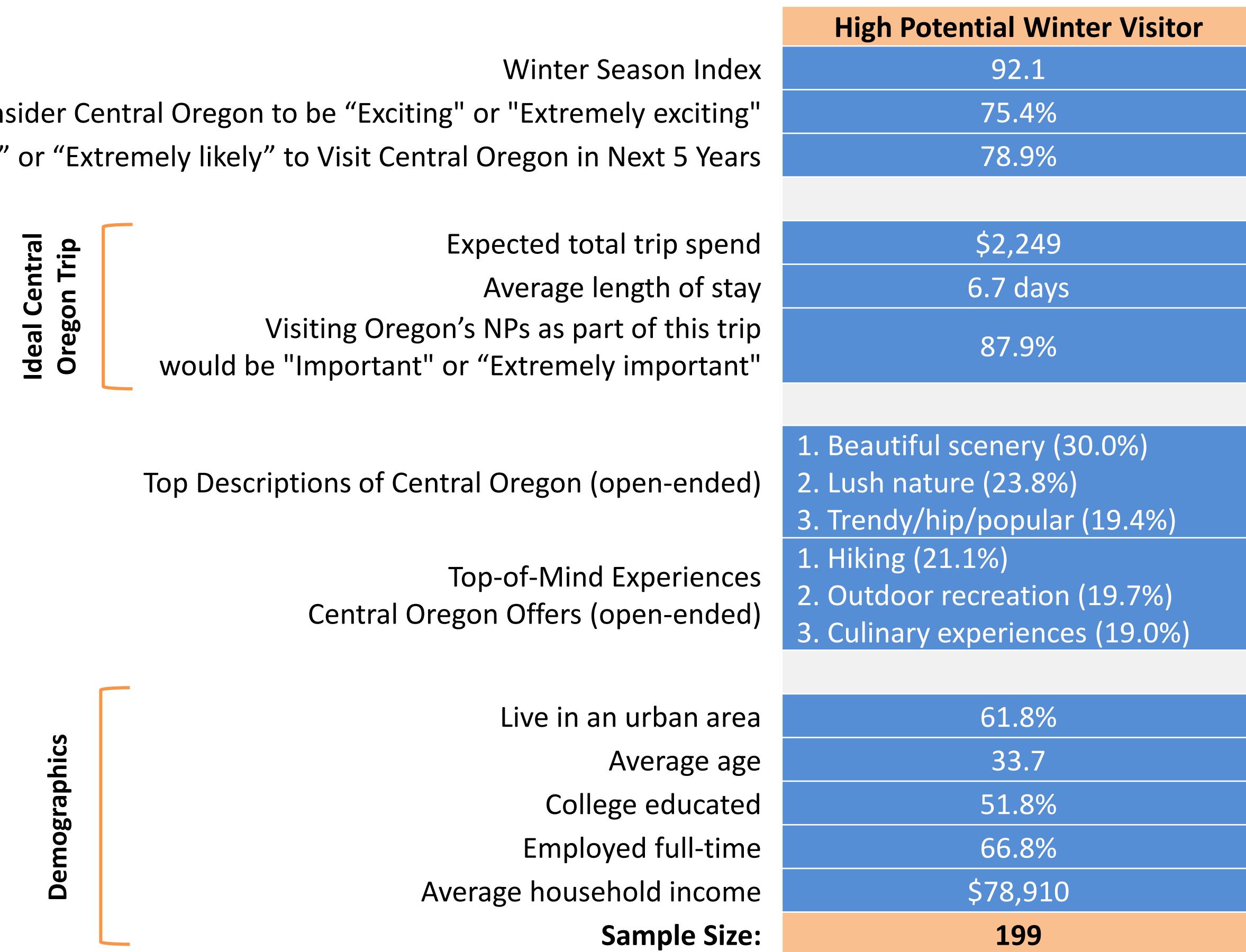
The High Potential Winter Visitor



The High Potential Winter Visitor:

- More likely to consider Central Oregon an exciting destination compared to high potential summer visitors (75.4% vs. 62.7%).
- More likely to visit Central Oregon in the next five years (78.9% vs. 73.4%).
- Expects to spend more money in Central Oregon on their ideal trip compared to high potential summer visitors (\$2,246 vs. \$1,854).
- More likely to live in an urban area than high potential summer visitors (61.8% vs. 52.3%).
- More likely to be college educated, employed full-time and have a higher annual household income compared to high potential summer visitors.

Figure: Profile of the High Potential Winter Visitor

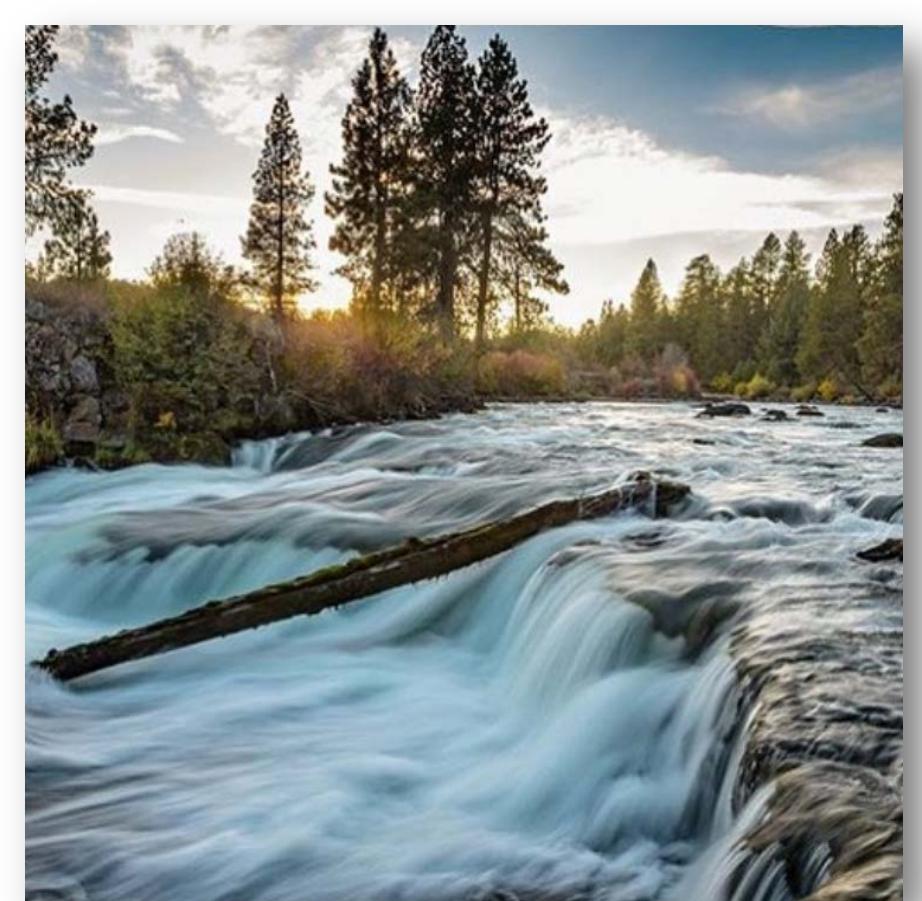


TRAVELER ACTIVITY INDICES

Traveler Activity Index

- Which of the following have you participated in as part of a leisure trip in the past 3 years?
- How likely are you to participate in each of the following as part of a leisure trip in the next 3 years?
- Score from 0-100, with higher scores indicating a higher propensity

- | | | |
|--|---------------------------------------|---------------------------|
| • Hiking | • Horseback riding | • Culinary/dining |
| • Fishing | • Rock climbing | • Craft breweries |
| • Skiing/snowboarding | • Athletic events
(marathon, etc.) | • Concert/festival |
| • Winter activities (non-ski) | • Mountain biking | • Spa |
| • Rafting | • Road cycling | • Kid-friendly activities |
| • Water recreational activities
(SUP, kayaking, etc.) | • Golf | • Museums & art galleries |



Above: Images of Central Oregon. Courtesy of Instagram.com/VisitCentralOregon.

FAMILY TRAVELERS (NUCLEAR): ACTIVITY INDEX

Below shows the index score of Family Travelers (nuclear) for each activity.

Outdoor Activities



Hiking
(54.4)



Fishing
(51.1)



Horseback Riding
(47.2)



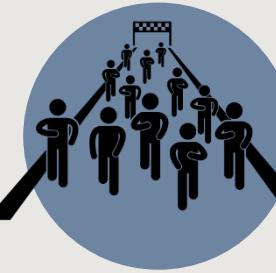
Rock Climbing
(43.8)



Skiing/
Snowboarding
(44.5)



Winter activities—
non-ski
(48.6)



Athletic Events—
Marathon, etc.
(45.7)



Mountain Biking
(46.3)



Rafting
(43.8)



Water recreational
activities—SUP, Kayaking,
etc. (53.3)



Road Cycling
(48.4)



Golf
(42.5)

Other Activities



Culinary
(63.7)



Craft Breweries
(48.2)



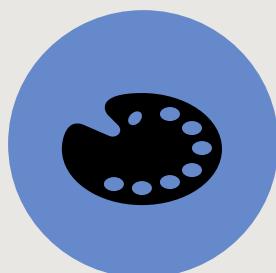
Concert/Festival
(55.2)



Spa
(53.3)



Kid Friendly
(67.9)



Museums & Art
Galleries (58.3)

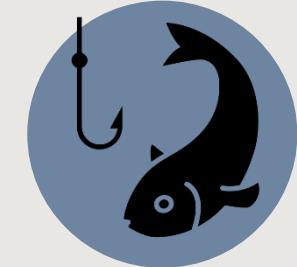
FAMILY TRAVELERS (EXTENDED): ACTIVITY INDEX

Below shows the index score of Family Travelers (extended) for each activity.

Outdoor Activities



Hiking
(62.3)



Fishing
(46.5)



Horseback Riding
(40.8)



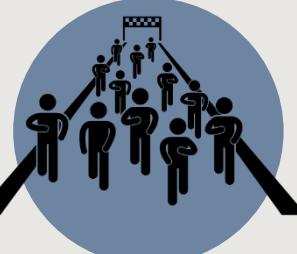
Rock Climbing
(34.7)



Skiing/
Snowboarding
(39.9)



Winter activities—
non-ski
(46.5)



Athletic Events—
Marathon, etc.
(44.4)



Mountain Biking
(35.5)



Rafting
(37.6)



Water recreational
activities—SUP, Kayaking,
etc. (52.6)



Road Cycling
(39.4)



Golf
(34.2)

Other Activities



Culinary
(80.9)



Craft Breweries
(51.1)



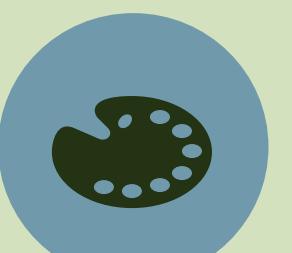
Concert/Festival
(63.2)



Spa
(52.9)



Kid Friendly
(77.8)



Museums & Art
Galleries (67.4)

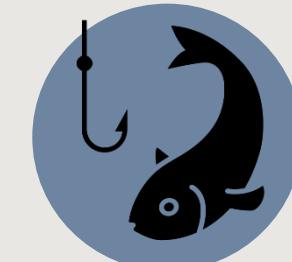
OUTDOOR ADVENTURE TRAVELERS: ACTIVITY INDEX

Below shows the index score of Outdoor Adventure Travelers for each activity.

Outdoor Activities



Hiking
(63.5)



Fishing
(46.0)



Horseback Riding
(39.4)



Rock Climbing
(32.8)



Skiing/
Snowboarding
(38.1)



Winter activities—
non-ski
(44.0)



Athletic Events—
Marathon, etc.
(43.3)



Mountain Biking
(35.6)



Rafting
(36.1)



Water recreational
activities—SUP, Kayaking,
etc. (50.4)



Road Cycling
(38.3)



Golf
(32.2)

Other Activities



Culinary
(79.3)



Craft Breweries
(49.9)



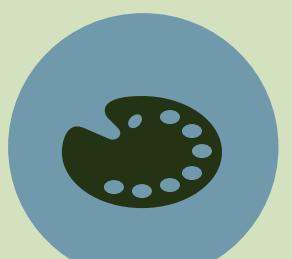
Concert/Festival
(59.6)



Spa
(50.0)



Kid Friendly
(70.4)

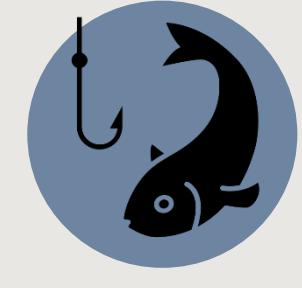
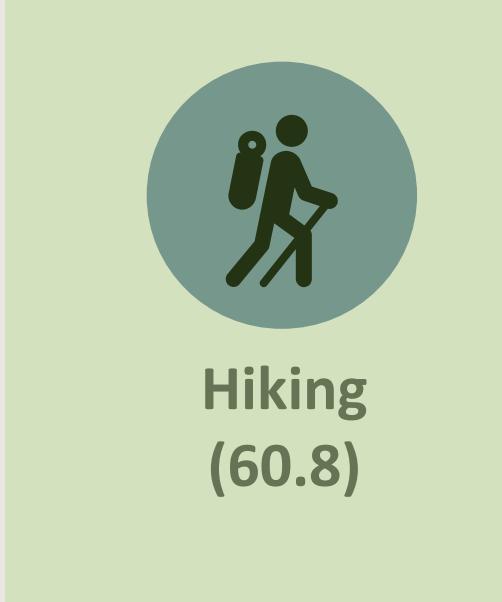


Museums & Art
Galleries (65.2)

TOUR GROUP TRAVELERS: ACTIVITY INDEX

Below shows the index score of Tour Group Travelers for each activity.

Outdoor Activities



Fishing
(47.6)



Horseback Riding
(44.0)



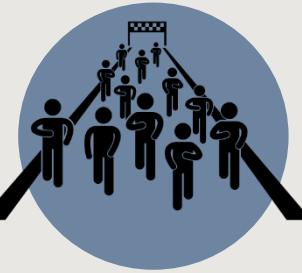
Rock Climbing
(38.0)



Skiing/
Snowboarding
(41.9)



Winter activities—
non-ski
(47.4)



Athletic Events—
Marathon, etc.
(45.4)



Mountain Biking
(41.4)



Rafting
(41.5)



Water recreational
activities—SUP, Kayaking,
etc. (53.5)



Road Cycling
(45.3)



Golf
(37.6)

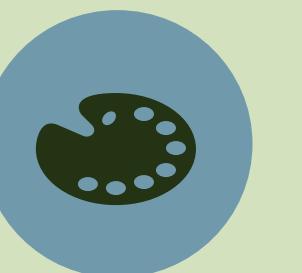
Other Activities



Craft Breweries
(52.5)



Spa
(56.1)

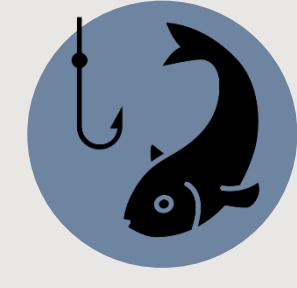


Museums & Art
Galleries (66.3)

SKI TRAVELERS: ACTIVITY INDEX

Below shows the index score of Ski Travelers for each activity.

Outdoor Activities



Fishing
(50.7)



Horseback Riding
(42.4)



Rock Climbing
(40.0)



Athletic Events—
Marathon, etc.
(48.4)



Mountain Biking
(43.1)



Rafting
(42.6)



Water recreational
activities—SUP, Kayaking,
etc. (62.3)



Road Cycling
(44.8)



Golf
(35.0)

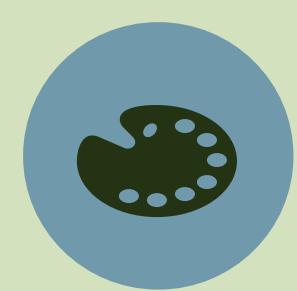
Other Activities



Craft Breweries
(58.7)



Spa
(55.3)



Museums & Art
Galleries (71.5)

HIGH POTENTIAL WINTER TRAVELERS: ACTIVITY INDEX

Below shows the index score of High Potential Winter Travelers for each activity.

Outdoor Activities



Fishing
(55.1)



Horseback Riding
(47.0)



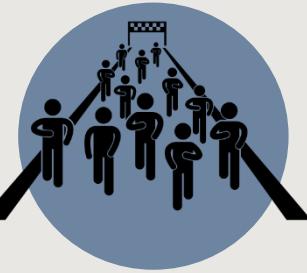
Rock Climbing
(45.1)



Skiing/
Snowboarding
(53.2)



Winter activities—
non-ski
(60.0)



Athletic Events—
Marathon, etc.
(52.5)



Mountain Biking
(50.5)



Rafting
(45.7)



Water recreational
activities—SUP, Kayaking,
etc. (59.9)



Road Cycling
(54.0)



Golf
(40.4)

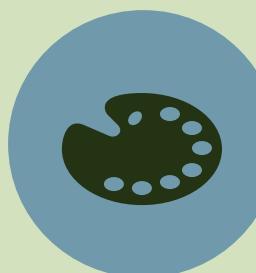
Other Activities



Craft Breweries
(57.2)



Spa
(57.3)



Museums & Art
Galleries (68.5)

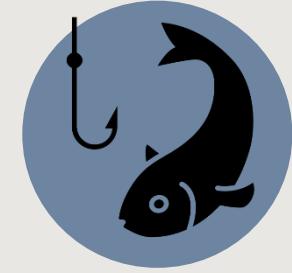
SPRING TRAVELERS: ACTIVITY INDEX

Below shows the index score of Spring Travelers for each activity.

Outdoor Activities



Hiking
(61.6)



Fishing
(42.3)



Horseback Riding
(37.3)



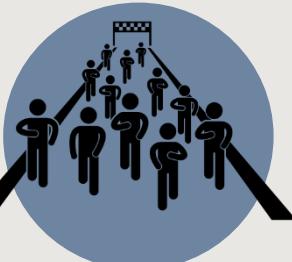
Rock Climbing
(30.9)



Skiing/
Snowboarding
(36.0)



Winter activities—
non-ski
(41.5)



Athletic Events—
Marathon, etc.
(41.9)



Mountain Biking
(32.5)



Rafting
(34.0)



Water recreational
activities—SUP, Kayaking,
etc. (46.5)



Road Cycling
(35.9)



Golf
(30.2)

Other Activities



Culinary
(82.5)



Craft Breweries
(50.7)



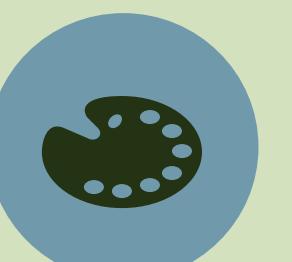
Concert/Festival
(62.5)



Spa
(49.0)



Kid Friendly
(69.5)



Museums & Art
Galleries (67.2)

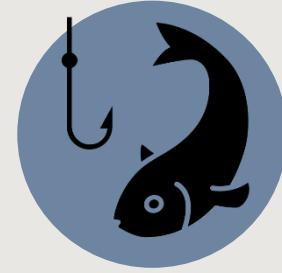
HIGH POTENTIAL SUMMER TRAVELERS: ACTIVITY INDEX

Below shows the index score of High Potential Summer Travelers for each activity.

Outdoor Activities



Hiking
(68.4)



Fishing
(49.1)



Horseback Riding
(41.5)



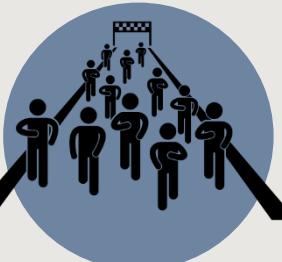
Rock Climbing
(34.7)



Skiing/
Snowboarding
(40.8)



Winter activities—
non-ski
(48.7)



Athletic Events—
Marathon, etc.
(47.5)



Mountain Biking
(38.9)



Rafting
(38.1)



Water recreational
activities—SUP, Kayaking,
etc. (54.9)



Road Cycling
(43.7)



Golf
(35.5)

Other Activities



Culinary
(82.2)



Craft Breweries
(55.6)



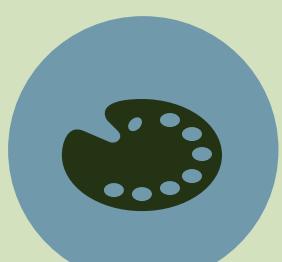
Concert/Festival
(62.9)



Spa
(55.0)



Kid Friendly
(75.7)



Museums & Art
Galleries (69.3)

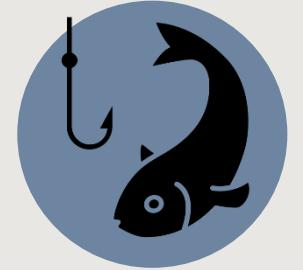
FALL TRAVELERS: ACTIVITY INDEX

Below shows the index score of Fall Travelers for each activity.

Outdoor Activities



Hiking
(60.6)



Fishing
(39.9)



Horseback Riding
(35.5)



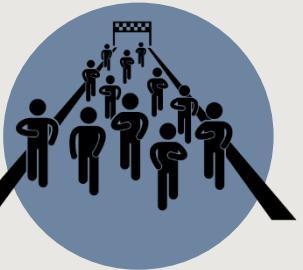
Rock Climbing
(29.8)



Skiing/
Snowboarding
(35.4)



Winter activities—
non-ski
(40.4)



Athletic Events—
Marathon, etc.
(39.7)



Mountain Biking
(30.5)



Rafting
(32.0)



Water recreational
activities—SUP, Kayaking,
etc. (46.8)



Road Cycling
(33.8)



Golf
(28.3)

Other Activities



Culinary
(85.1)



Craft Breweries
(52.6)



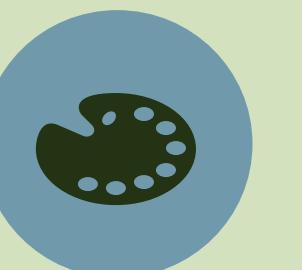
Concert/Festival
(62.8)



Spa
(49.8)



Kid Friendly
(70.7)



Museums & Art
Galleries (69.0)

30-45 TRAVELERS: ACTIVITY INDEX

Below shows the index score of 30-45 Travelers for each activity.

Outdoor Activities



Fishing
(41.9)



Horseback Riding
(37.8)



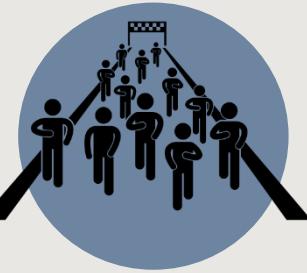
Rock Climbing
(31.4)



Skiing/
Snowboarding
(39.0)



Winter activities—
non-ski
(45.4)



Athletic Events—
Marathon, etc.
(43.8)



Mountain Biking
(34.8)



Rafting
(35.2)



Water recreational
activities—SUP, Kayaking,
etc. (49.2)



Road Cycling
(37.8)

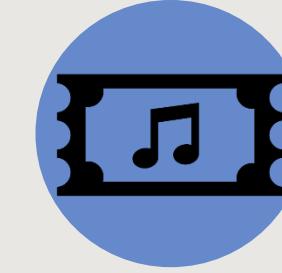


Golf
(30.2)

Other Activities



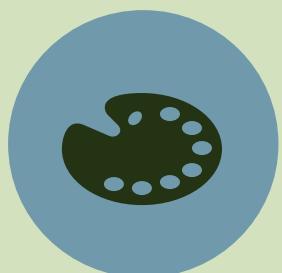
Craft Breweries
(51.1)



Concert/Festival
(59.4)



Spa
(52.0)



Museums & Art
Galleries (65.2)

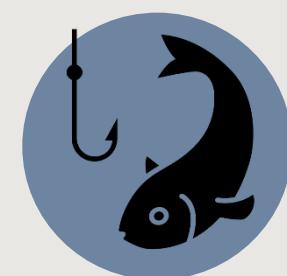
45-60 TRAVELERS: ACTIVITY INDEX

Below shows the index score of 45-60 Travelers for each activity.

Outdoor Activities



Hiking
(55.0)



Fishing
(42.9)



Horseback Riding
(32.5)



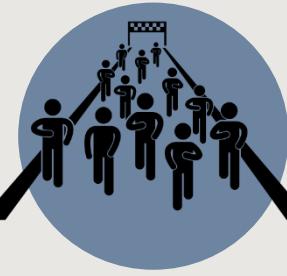
Rock Climbing
(23.2)



Skiing/
Snowboarding
(28.7)



Winter activities—
non-ski
(33.6)



Athletic Events—
Marathon, etc.
(38.6)



Mountain Biking
(28.7)



Rafting
(30.4)



Water recreational
activities—SUP, Kayaking,
etc. (41.6)



Road Cycling
(30.1)



Golf
(30.9)

Other Activities



Culinary
(83.7)



Craft Breweries
(46.7)



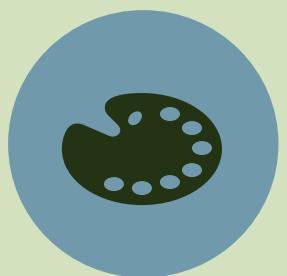
Concert/Festival
(57.2)



Spa
(44.5)



Kid Friendly
(62.9)



Museums & Art
Galleries (64.1)

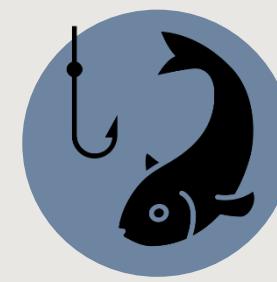
60+ TRAVELERS: ACTIVITY INDEX

Below shows the index score of 60+ Travelers for each activity.

Outdoor Activities



Hiking
(48.5)



Fishing
(32.0)



Horseback Riding
(24.6)



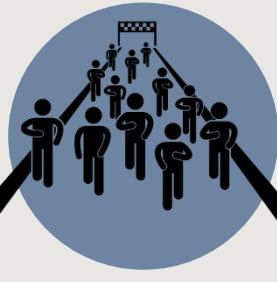
Rock Climbing
(15.3)



Skiing/
Snowboarding
(19.0)



Winter activities—
non-ski
(20.4)



Athletic Events—
Marathon, etc.
(27.4)



Mountain Biking
(19.2)



Rafting
(21.9)



Water recreational
activities—SUP, Kayaking,
etc. (28.6)



Road Cycling
(24.8)



Golf
(24.9)

Other Activities



Culinary
(86.5)



Craft Breweries
(43.2)



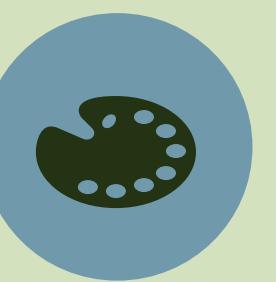
Concert/Festival
(53.8)



Spa
(39.2)



Kid Friendly
(62.1)

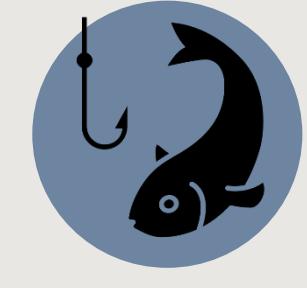


Museums & Art
Galleries (66.3)

CONSUMERS: ACTIVITY INDEX

Below shows the index score of Consumers for each activity.

Outdoor Activities



Fishing
(44.3)



Horseback Riding
(30.7)



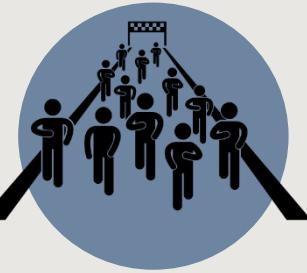
Rock Climbing
(21.5)



Skiing/
Snowboarding
(36.3)



Winter activities—
non-ski
(44.4)



Athletic Events—
Marathon, etc.
(41.2)



Mountain Biking
(31.3)



Rafting
(42.3)



Water recreational
activities—SUP, Kayaking,
etc. (58.9)

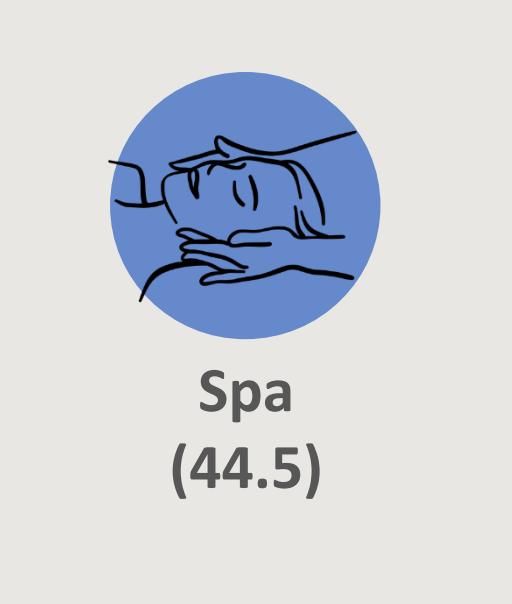


Road Cycling
(37.4)



Golf
(31.0)

Other Activities



MARKETING TO LEISURE TRAVELERS

Key of Images Tested (1 of 3)

Image 1

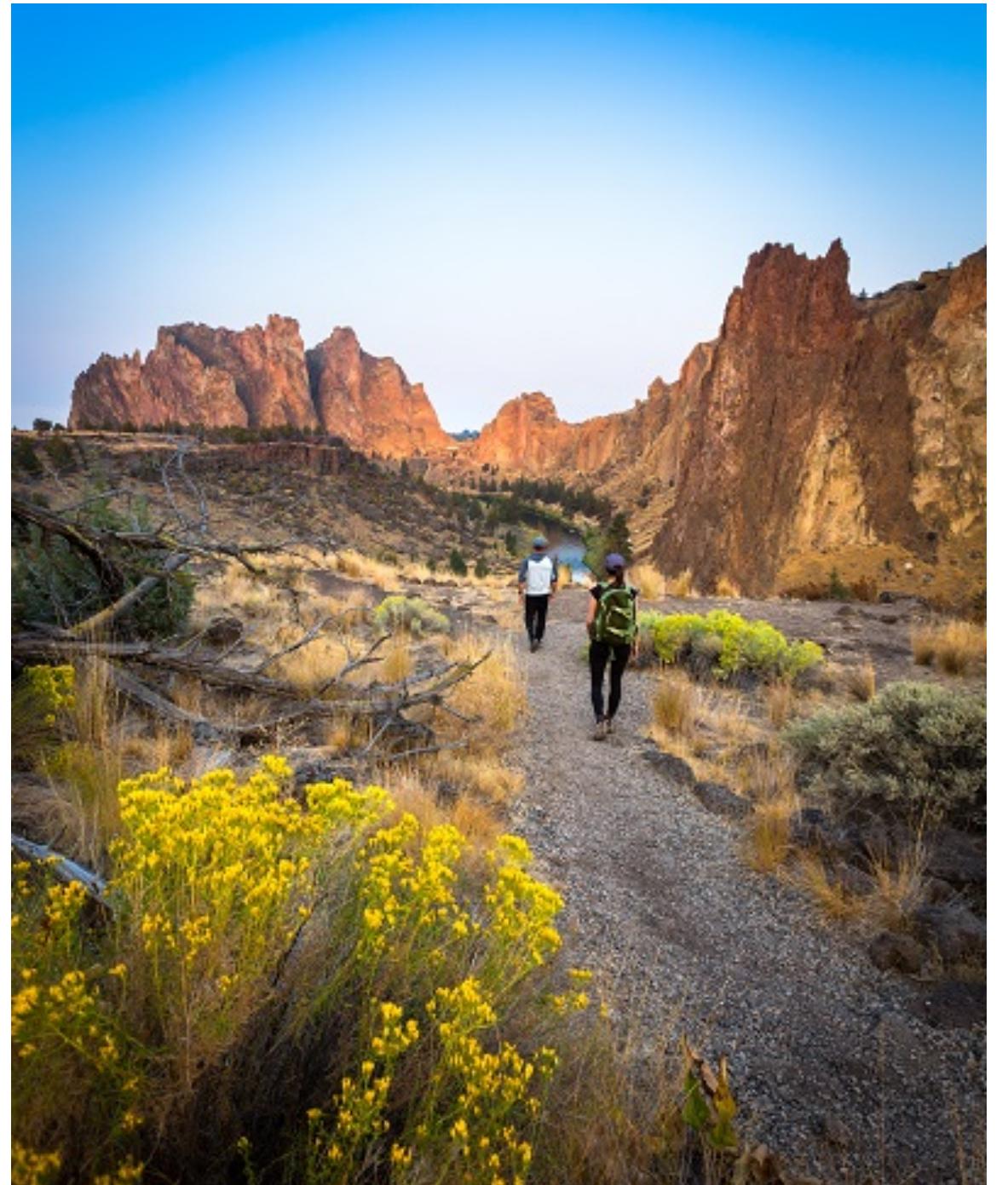


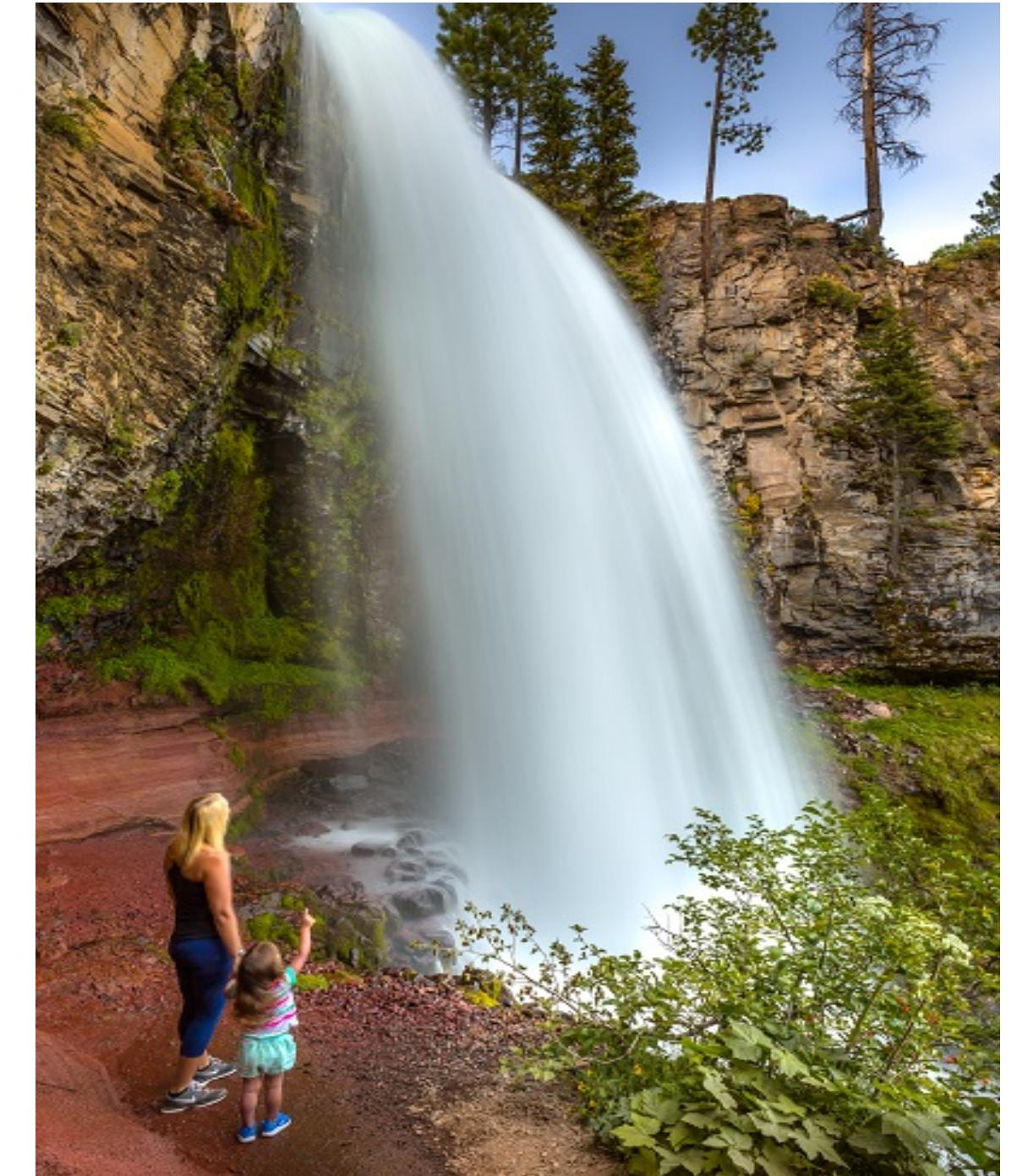
Image 2



Image 3



Image 4



Key of Images Tested (2 of 3)

Image 5

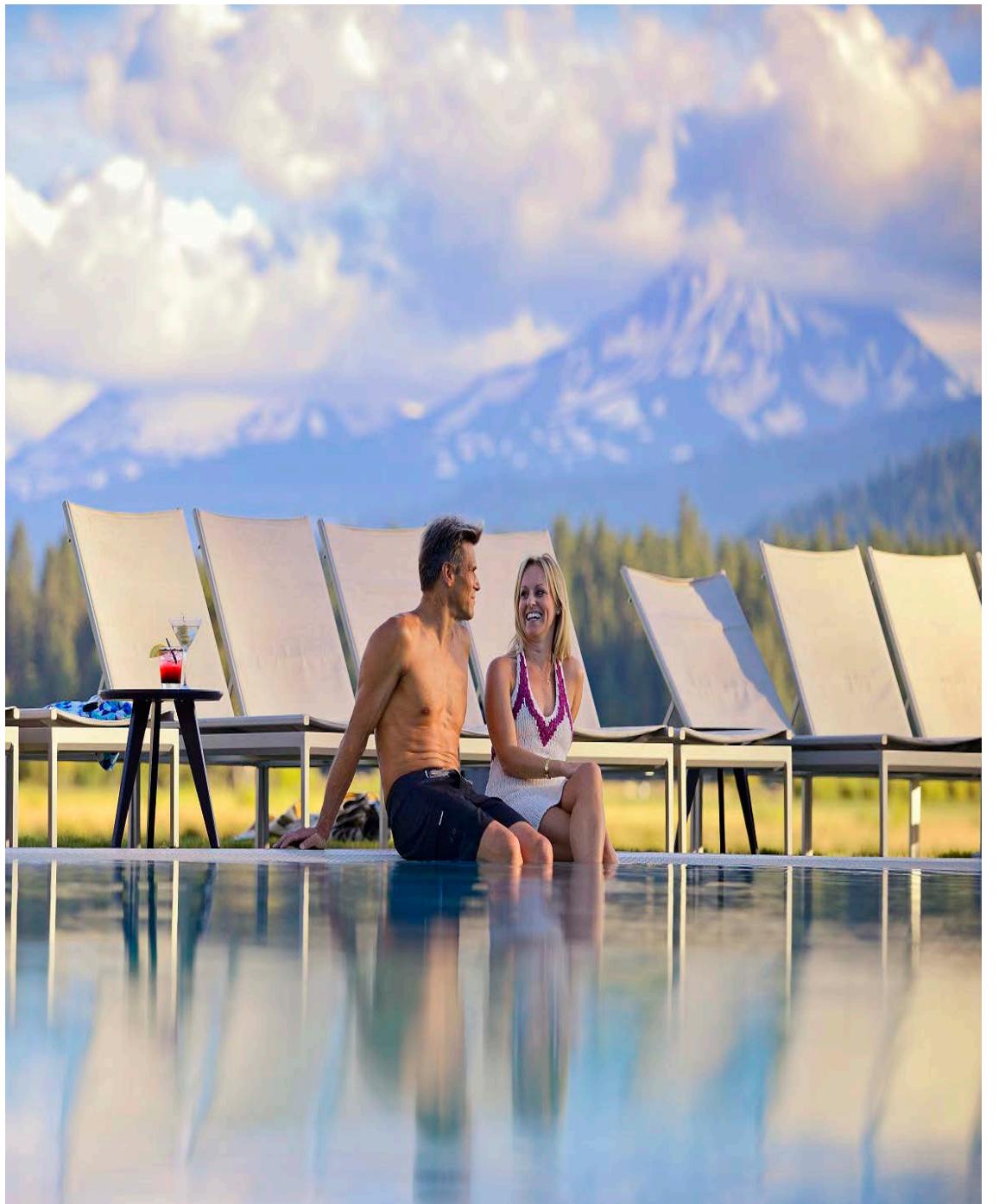


Image 6



Image 7



Image 8



Key of Images Tested (3 of 3)

Image 9



Image 10



Image 11



Top 4 Images Tested

Image 4



Image 2



Image 1



Image 3



Ranking of Exciting Central Oregon Images

TOP

Image 4



Image 2



Image 1



BOTTOM

Image 8



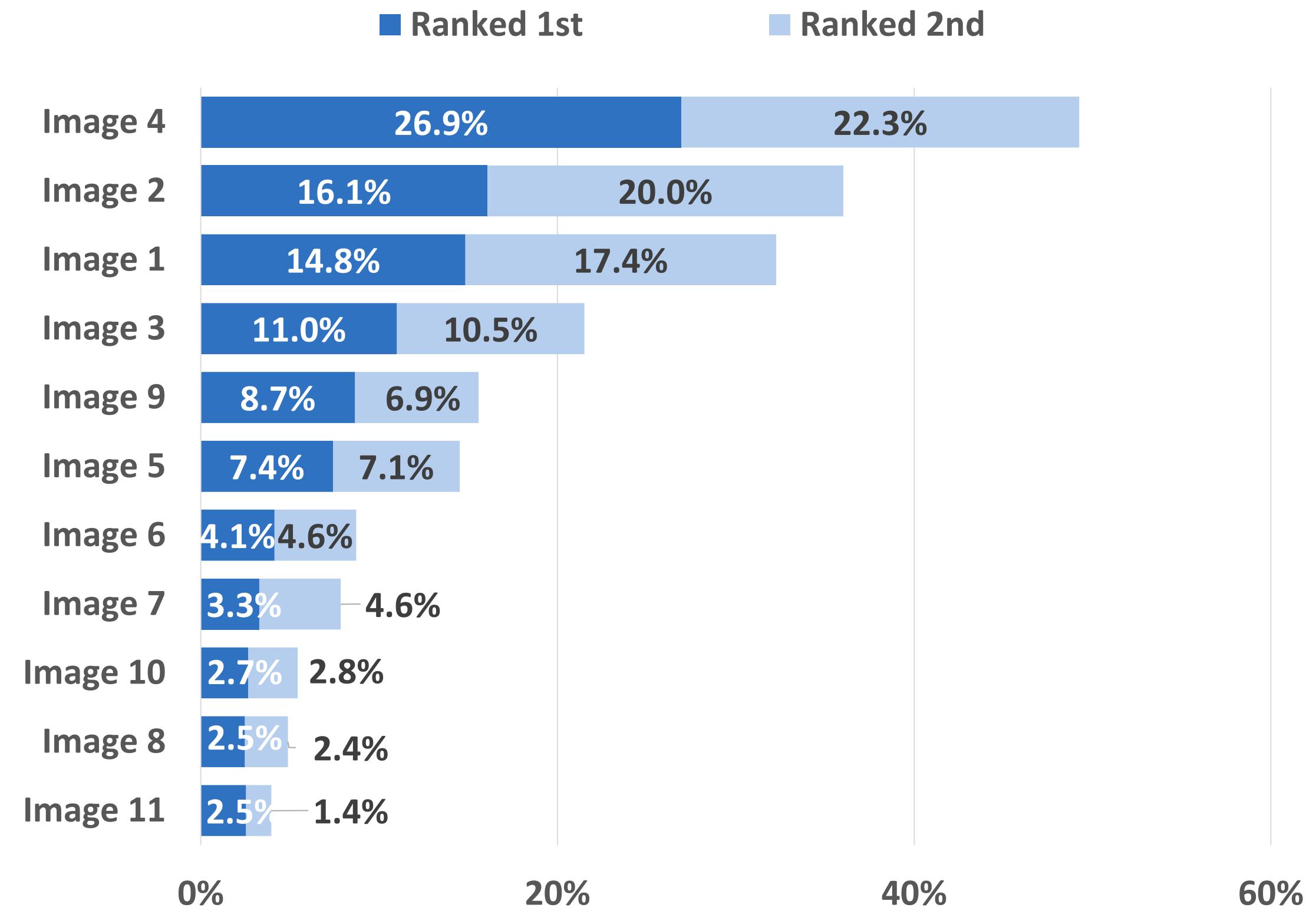
Image 10



Image 11



Figure: Ranking of Central Oregon's Images (% ranking each image as #1 or #2)



Question: Which of the images make you most excited to visit Central Oregon for a leisure trip? Please rank the top three images by dragging from the left and placing in the appropriate rank number at the right. Base: All respondents. 1,618 responses.

Online Travel Planning Preferences

Leisure travelers have a higher preference for using desktops/laptops for online travel planning. This preference particularly stands out when travel planning tasks are related to making actual bookings/purchases. Approximately half or more of respondents said they prefer or strongly prefer to use a desktop or laptop when booking airfare/transportation (52.0% vs. 28.5% preferring to use a mobile phone), booking lodging (50.3% vs. 29.8% preferring to use a mobile phone) and purchasing tickets to activities, attractions or events (48.2% vs. 30.8% preferring to use a mobile phone). The travel planning tasks travelers are most likely to execute using a mobile phone are researching trip ideas (36.2% said they prefer or strongly prefer using a mobile phone) and researching specific places to go to select a trip destination (35.0)—although the preference to use a desktop/laptop for these tasks is still higher (42.7% & 45.1%, respectively).

Figure: Online Travel Planning Preferences

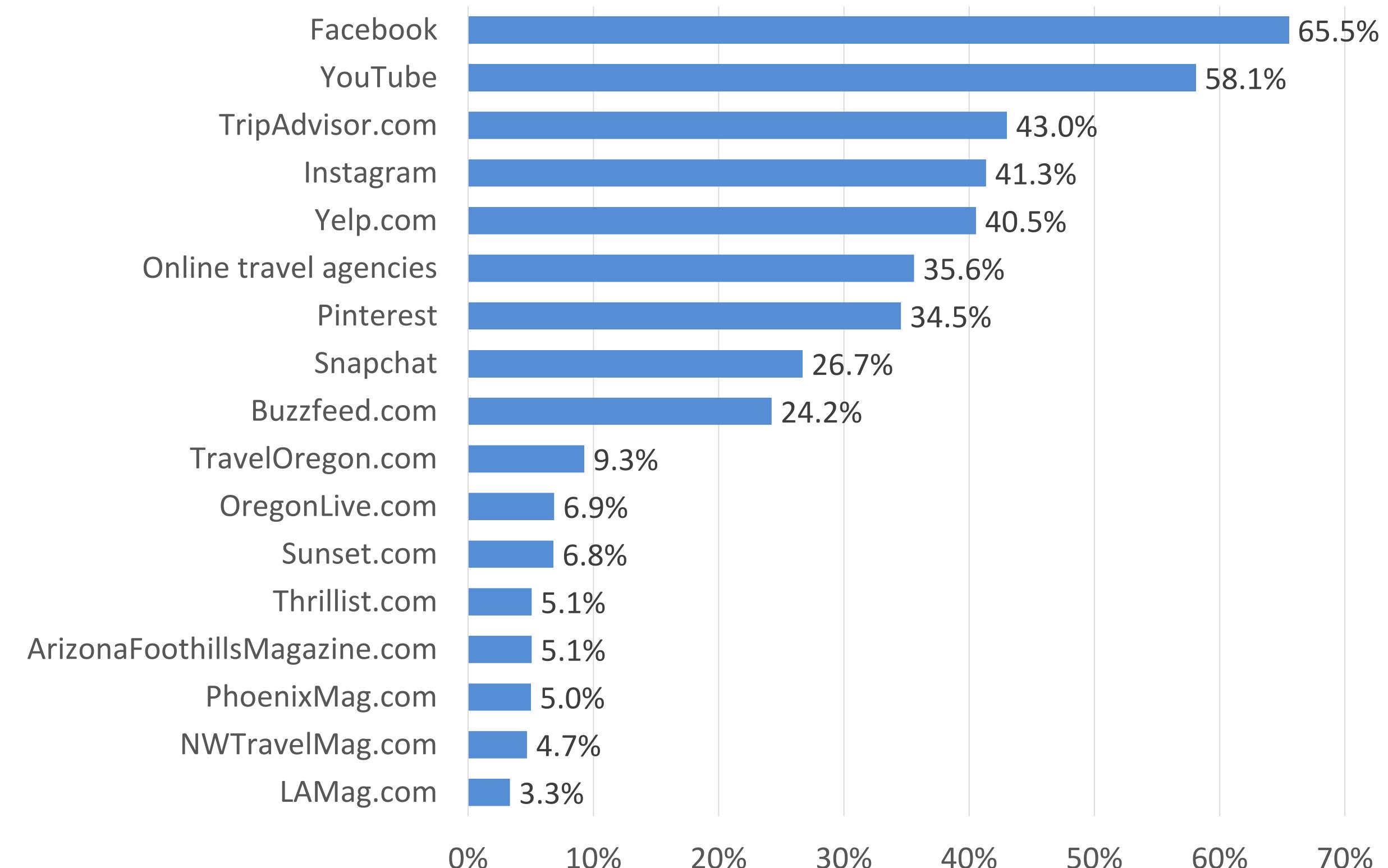
	Strongly prefer using a mobile phone	Prefer using a mobile phone	Neutral - I have no preference	Prefer using a desktop or laptop	Strongly prefer using a desktop or laptop
Researching trip inspiration and trip ideas	19.6%	16.6%	21.1%	22.6%	20.1%
Researching information on specific places to go to select a trip destination	19.0%	16.0%	19.8%	22.8%	22.3%
Researching airfare and/or transportation to and from a destination	18.1%	13.9%	19.5%	23.7%	24.8%
Researching hotels or lodging	17.2%	14.3%	20.5%	24.7%	23.3%
Comparing the features of specific places to go and/or things to do in a destination for a trip itinerary	17.9%	14.0%	21.1%	24.3%	22.6%
Booking airfare and/or transportation to and from a destination	16.9%	11.6%	19.5%	25.5%	26.5%
Booking hotel or lodging	16.3%	13.5%	19.9%	24.6%	25.7%
Purchasing tickets to activities, attractions or events	17.1%	13.7%	21.1%	24.5%	23.7%

Question: Please think about how you prefer to do your online travel planning. If given the choice between a mobile phone or a desktop or laptop computer (PC or Mac), which do you prefer to use for each of these travel planning tasks? (Select one) Base: All respondents. 1,618 responses.

Online Resources Used in Past Year

Facebook (65.5%) and YouTube (58.1%) were the most utilized online resources in the past year amongst leisure travelers surveyed. Survey respondents were provided with a list of 17 websites/services and asked which they had used or read in the past 12 months. Following Facebook and YouTube were user-generated reviews websites and other social media channels. Approximately 40 percent or more reported using TripAdvisor.com (43.0%), Instagram (41.3%) and/or Yelp.com (40.5%) in the last year. In addition, over one-third of respondents have used online travel agencies (35.6%) and/or Pinterest (34.5%).

Figure: Online Resources Used in Past Year

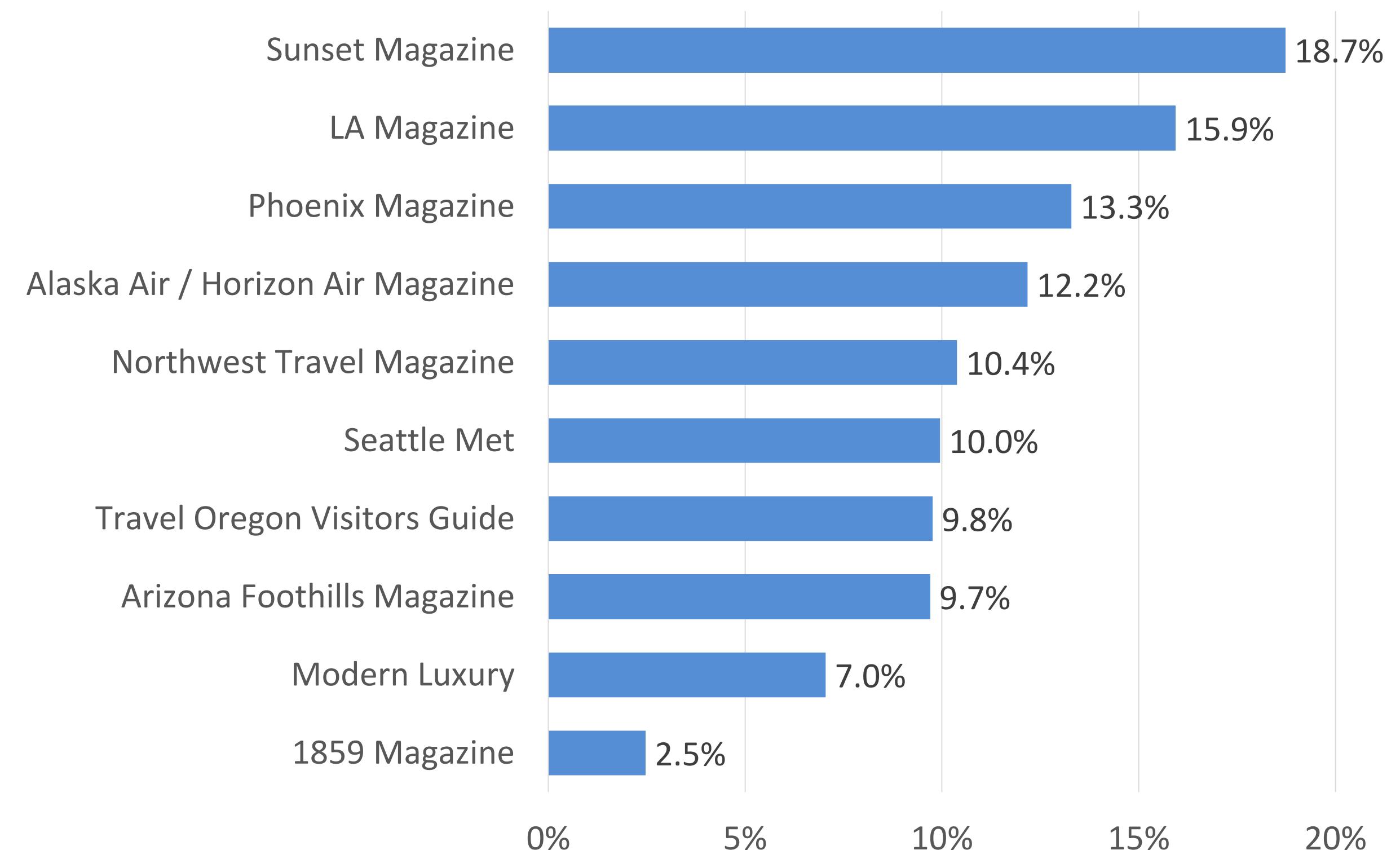


Question: Which of the following online resources have you used or read in the past 12 months? (Select all that apply) Base: All respondents. 1,618 responses.

Publications Read in Past Year

Amongst the publications tested, *Sunset Magazine* and *LA Magazine* have the highest readership. Just under one-in-five leisure travelers surveyed have read *Sunset Magazine* (18.7%) and/or *LA Magazine* (15.9%) in the past year. In addition, one-in-ten respondents also reported reading the Travel Oregon Visitors Guide in the last 12 months (9.8%).

Figure: Publications Read in Past Year



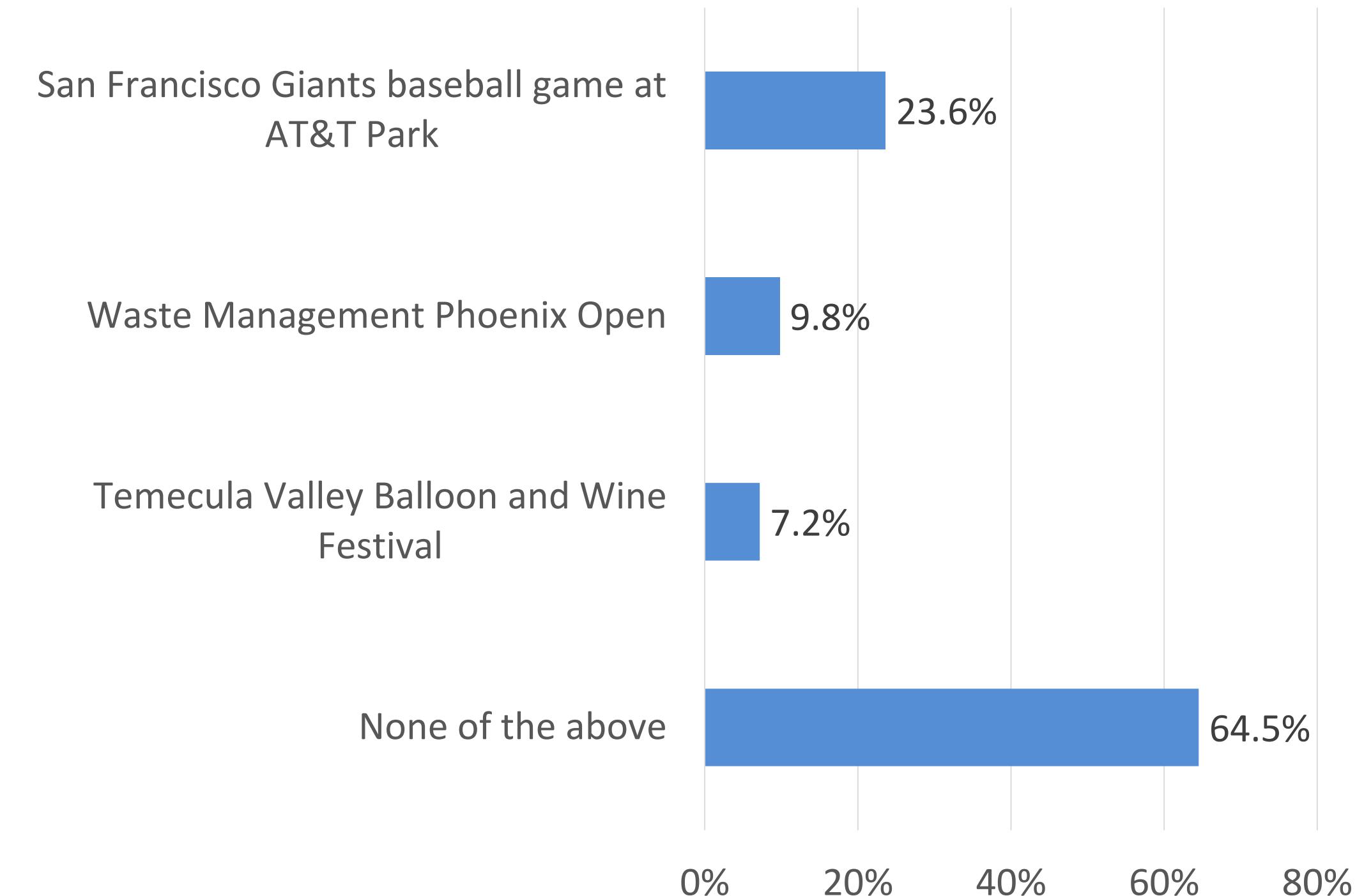
Question: Which of the following publications have you read in the past 12 months? (Select all that apply) Base: All respondents. 1,618 responses.

Events Attended in the Past 5 Years

Although nearly two-thirds of leisure travelers surveyed have not attended any of the events tested, about one-quarter have been to a San Francisco Giants baseball game at AT&T park in the past 5 years (23.6%). One-in-ten have also been to the Waste Management Phoenix Open (9.8%) and 7.2 percent have been to the Temecula Valley Balloon and Wine Festival in the last 5 years.

Note: The Survey of Travelers in Key Markets specifically targeted residents of Los Angeles, Phoenix, San Francisco and Seattle.

Figure: Events Attended in the Past 5 Years



Question: Have you attended any of the following events in the past five years? (Select all that apply) Base: All respondents. 1,618 responses.

DEMOGRAPHIC PROFILE

Demographic Profile

The following presents the demographic profile for all respondents who completed the Survey of Travelers in Key Markets.

Lives in an urban area – 43.3%



Female – 59.0%
Male – 41.0%



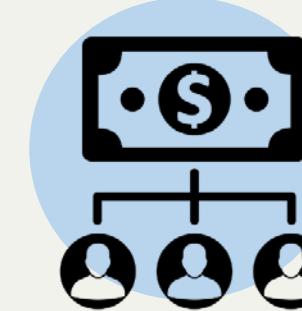
Mean age – 38.7



College educated – 45.6%



Mean household income – \$71,347



Employed full-time – 51.6%



Base: 1,618 respondents.