

**Oregon's Bounty  
Visitor Behavior and Attitudes  
Related to Oregon Products**

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## Introduction

In 2009, Oregon received 65.7 million U.S. visitors, including 38.2 million day visitors and 27.5 million overnight visitors, according to the *Oregon 2009 Visitor Report*, prepared by Longwoods International. The majority of them were visiting for leisure purposes and like U.S. travelers in general, these visitors enjoyed a variety of activities such as shopping and culinary-related activities, as well as opportunities to purchase unique Oregon products. Many business/convention visitors to Oregon enjoyed these activities as well.

Longwoods estimates that in 2009, \$1.0 billion and \$0.6 billion were spent on retail purchases by overnight visitors and day visitors, respectively. Restaurant/food/beverage purchases totaled \$1.1 billion among overnight visitors and \$0.3 billion among day visitors that year. Together, therefore, total visitors to Oregon spent \$3.0 billion on shopping and dining in 2009, a significant share of visitor spending in the state.

But these activities do more than just generate revenues, employment and tax revenues for the state, its residents and its local businesses. They also influence a number of other visitor behaviors and attitudes.

## Research Objectives

This study was designed and implemented to explore a number of aspects related to Oregon visitors' shopping and dining experiences. Specifically, Oregon visitors' awareness of Oregon products, their perceptions related to the uniqueness of these products as compared to those available in other destinations, and their purchase of such products both while visiting, as well as after returning home, were all measured. The study also investigated the influence that unique products have on decisions to visit, trip satisfaction and likelihood to return to Oregon.

Many U.S. travelers buy products at their destination to give as gifts, as well as share their experiences with their family and friends in a number of other ways too. These topics were also explored, as well as suggestions from visitors as to how to improve various aspects of building awareness and purchase of Oregon's unique products, and their satisfaction with Oregon visits.

## **Survey Methodology**

To conduct this study, Suzanne Cook Consulting, LLC executed an online survey with U.S. adults who had visited Oregon during the 2008 – 2010 period. The sample was obtained through and the survey was conducted by TNS Global. The TNS TravelsAmerica program, from which the sample was derived, is a syndicated study that uses a managed panel to track U.S. resident trip behaviors, similar to what Longwoods International does with its ongoing survey. Each month, TNS conducts over 18,000 Internet-based interviews among past 12-month travelers who have traveled more than 50 miles from their homes (excluding commuters). From this sample, past-month trip data from 5,000+ travelers provide detailed insights into travel volumes, visitor profiles, trip characteristics, and market share.

A total of 770 surveys with past Oregon visitors were completed for this study. The data were compared to data available from TNS on Oregon visitors and were weighted by gender, age and income to reflect the characteristics of Oregon visitors as shown in the TNS TravelsAmerica survey. Complete data tables have been provided to Travel Oregon.



## Executive Summary

### General Travel Behavior Of Oregon Visitors

- Ø U.S. adults who had visited Oregon during the 2008 – 2010 period are for the most part experienced travelers with nearly nine-in-ten having taken a leisure trip and more than one-quarter traveling on business in the past year. This compares to 68% of all U.S. adults who traveled for leisure in the past year and 24% who traveled on business, according to the Wave 1, 2011 *travelhorizons*<sup>TM</sup> survey.
- Ø In fact, 35% were frequent leisure travelers (5+ trips in past year) and nearly 10% were frequent business travelers.
- Ø Like all U.S. travelers, personal vehicles (90%) and scheduled airlines (47%) were the most commonly used modes of transportation.
- Ø Nearly half stayed with family or friends at least once on their past year travels, while use of hotels was popular too, especially midscale (33%), upper midscale (27%) and upper upscale properties (25%).
- Ø Upper income travelers, out-of-state Oregon visitors and those with high spending on Oregon products were the most likely to use upscale properties on their trips around the U.S. and elsewhere.

### Demographic Characteristics of Oregon Visitors

- Ø More than six-in-ten Oregon visitors were women and nearly half were Boomers, between the ages of 45 and 64 years, as compared to only 38% among all U.S. leisure travelers. Millennials (those under age 35) comprised 24% of the Oregon visitor market and 15% were age 65+. The mean age of Oregon visitors participating in this survey was 48.3 years.
- Ø Oregon visitors were somewhat more likely than U.S. leisure travelers overall to be married (63% versus 58%) but less than one-third of both groups reported having children under 18 living at home.
- Ø Oregon visitors reported somewhat lower incomes than U.S. travelers overall, with a mean annual household income of \$68,600 and a median of \$56,000. This is well above the overall U.S. household average, however. And, more than two-in-ten showed household incomes of \$100,000 or more per year.
- Ø This is a bit surprising in that Oregon visitors skewed even more than travelers in general toward higher educational attainment (47% completed college or more). Nearly half were employed full time or self-employed.
- Ø The majority of Oregon visitors responding to this survey came from the West region (85%) and nearly half were in-state visitors.

## Executive Summary (Continued)

### Characteristics of Oregon Trips

- Ø Oregon visitors had fairly recent Oregon travel experiences to report. About 70% had been to the state since April 2010 and 90% had visited within the past three years.
- Ø Of those who had visited Oregon on the past year, most were on leisure trips (87%), visiting the state an average of 3 times for such purposes. Those under age 35, and those seemingly more engaged in culinary activities and Oregon-products-related behavior were more likely than average to be frequent leisure visitors.
- Ø Nearly two-in-ten visited Oregon on at least one business trip in the past year. In fact, those who did, visited an average of 3.5 times each on business since April 2010.
- Ø The top activities of Oregon visitors reflect those reported by U.S. travelers in general, with visits to friend/relatives, enjoying the beach or waterfront, and shopping topping the list.
- Ø Activities related to Oregon's unique products, especially those involving food, were also quite popular. Overall, 55% participated in at least one culinary-related activity (including touring wineries, breweries, wine trails and farmers markets; attending wine/culinary festivals; sampling local foods; and taking cooking classes) while visiting.
- Ø Those aged 35-64 (Gen Xers and Boomers) reported above-average propensities for a number of these activities, as did those with high household incomes (%100,000+).
- Ø There were also correlations between higher rates of shopping and enjoying Oregon's unique products and other favorable attitudes about the state, as well as purchasing Oregon products at home.

### Oregon Visitor Behavior and Attitudes Related to Oregon Products

- Ø Before asking detailed questions on this topic, respondents were asked for their unaided awareness of Oregon products. Food products were mentioned most often (44%), followed by forest products (38%), "miscellaneous", that included woolens and Christmas trees (24%) and beverages (21%).

## Executive Summary (Continued)

### Oregon Visitor Behavior and Attitudes Related to Oregon Products (Continued)

- Ø Women (50%), older (65+ = 55%) and retired visitors w(52%) were more likely to think of food products as representing Oregon than other demographic groups.
- Ø Among the more than two-in-ten who mentioned beverages as Oregon products, three times as many thought of wine than beer. High income respondents and college grads mentioned both of these more than their lower income and less educated counterparts.
- Ø Oregon received high ratings as a destination that offers unique products, with six-in-ten of its visitors rating it excellent or good. A very small 5% rated it fair or poor.
- Ø And many acted on these positive attitudes, with 55% reporting that they engaged in culinary activities while on their recent visits. Oregon visitors have a significantly greater tendency to engage in culinary activities than U.S. leisure travelers in general. According to the U.S. Travel Association's *Profile of Culinary Travelers, 2006 Edition* report, overall only 17% of American leisure travelers engaged in some type of culinary or wine-related activity (defined in a very similar way) while traveling during the prior three years.
- Ø About half of all Oregon visitors bought one or more local food product while in the state, including wine (22%), microbrews (19%) and other Oregon foods (25%) while visiting. Again, older, upper income and college grads were most likely to make such purchases. Such purchases were also correlated with a number of other positive attitudes and behaviors related to Oregon products.
- Ø More than two-thirds of them took such products home for themselves and 29% took them home to give as gifts. Less than half as many visitors said they bought other Oregon products (22%) but among those who did they were more likely to take them home for themselves (87%) or for their family and friends as gifts (43%). This presents a secondary opportunity for Oregon to spread the word about their unique offerings. In addition to word-of-mouth, food and wine provide very tangible examples of the unique qualities of the destination.
- Ø Oregon visitors spend an average of \$142 on such products per visit.

## Executive Summary (Continued)

### Oregon Visitor Behavior and Attitudes Related to Oregon Products (Continued)

- Ø Satisfaction with the opportunities afforded visitors in Oregon to buy local products was high; three-quarters rated this a “5” or “4” on a 5-point scale with “5” being the highest. This high satisfaction was evident across various demographic and attitudinal groups.
- Ø Most visitors (58%) were already aware of Oregon products before visiting, but surprisingly residents were not significantly more aware of these than out-of-state visitors. About four-in-ten just happened to find them along the way and 29% received product referrals from family and/or friends. The vast majority of visitors, however, did not use any of the other sources of information investigated, suggesting a need for better promotion of these materials.
- Ø However, about two-thirds said they did not want any other information. Among those who did, providing information at local hotels was the most frequent suggestion.
- Ø This research confirmed that the purchase of local products does more than just bring in money and support the travel industry. Over one-third of all Oregon visitors said that, in general, the opportunity to sample and buy local products has at least some influence on their selection of a destination.
- Ø Regarding Oregon products in particular, one-quarter of visitors said they were much more likely to buy these products at home after having visited. This was particularly true for those with above-average spending on Oregon products while visiting and those feeling the most positive about the uniqueness of Oregon products.
- Ø A even larger 42% said the opportunity to buy such products while in the state made them at least somewhat more likely to visit again in the future. Higher intentions to revisit because of products were expressed by those already more engaged, such as those participating in culinary activities while visiting and spending more purchasing such products.
- Ø A smaller but still fairly significant 21% believed that the information they provided about Oregon’s unique products also influenced the purchase of these by their friends and family. And four-in-ten thought that providing such product information also had at least some influence on the decisions of their friends and relatives to actually visit the state themselves.



## Executive Summary (Continued)

### Oregon Visitor Behavior and Attitudes Related to Oregon Products (Continued)

- Ø Nearly one-third of Oregon visitors reported having purchased Oregon products several times after returning home. Only 11% said they never have but a larger one-third could not recall. Among product buyers, the most often purchased products included: wine (37%), traditional artisan foods (32%) and microbrews (26%). More than four-in-ten of those who reported buying Oregon products at home said they purchased other Oregon foods. Again, the tendency to buy Oregon products at home was positively correlated with more favorable opinions of Oregon's unique product offerings, as well as higher spending on such products while visiting.
- Ø Most of these who buy such products at home do so in their local stores (70%). Limited use of other distribution channels suggests there may be additional presently under-used channels that might be considered for expansion.
- Ø Most visitors (60%) believe that it is easy to buy Oregon products at home, but about the same share suggest that a website dedicated to showcasing such products would enhance their ability to obtain Oregon products at home.
- Ø Social media is catching on as a means to share travel experiences, especially among younger Americans. This is also true among Oregon visitors, 16% of whom said they used social media, most likely Facebook, to share their "Oregon Travel Story". Among those who did, however, only just over one-third mentioned Oregon products in their social media communiqués – again an activity that should be encouraged.
- Ø Greater shares of visitors used more traditional methods to share their Oregon experiences with family and friends upon their return home, most often involving face-to-face conversations (51%) and the sharing of photos and videos (30%).

## Executive Summary (Continued)

### Oregon Visitor Behavior and Attitudes Related to Oregon Products (Continued)

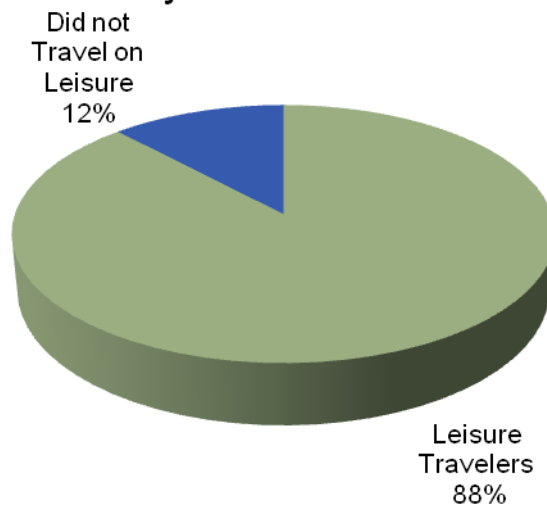
- Ø Visitor satisfaction is high among Oregon visitors, with 85% saying that they were extremely or somewhat satisfied with their recent visit. The mean satisfaction rating, with 5 being the most positive, was 4.4. Satisfaction levels were consistently high among the various demographic and behavioral/attitudinal segments analyzed.
- Ø Visitation to Oregon also influences other behaviors and decisions. For example, almost two-in-ten said they would consider either retiring there (18%) or moving to Oregon (17%) after having visited the state. Smaller shares said they would consider starting, expanding or relocating a business there. But given the million of people who visit Oregon each year, even small percentages could translate into millions of new residents and businesses in the state.

**Section I.**  
**General Travel Characteristics of Oregon Visitors**

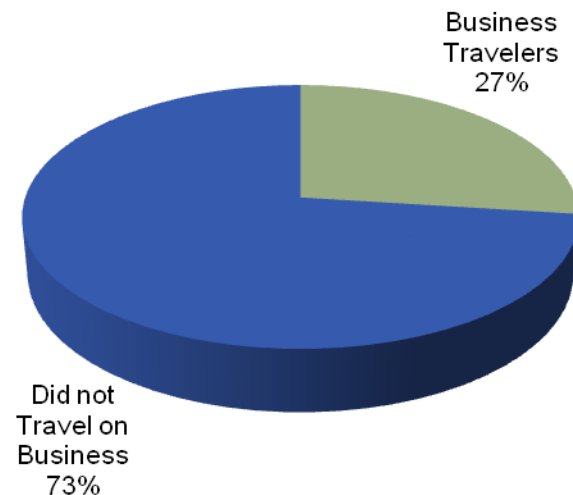
## Figure 1.1 Oregon Visitors' Travel Patterns in the Past 12 Months

- Ø 88% of Oregon visitors took at least one leisure trip to any destination in the past 12 months. More than one-third (35%) actually took five+ such trips.
- Ø Those with annual HH incomes of \$100,000+ (54%) and college graduates (44%) were most likely to have traveled five+ times on leisure in the past year. (See page 23)
- Ø 27% of Oregon visitors took at least one business/convention trip anywhere. Nearly 8% took five+ business trips in the past year.
- Ø Those most likely to have traveled 5+ times on business include upper-income visitors (17%), college grads (12%), and men (11%).
- Ø Oregon business visitors (22%) and out-of-state visitors (12%) were also above average on frequent business travel.

### Oregon Visitors who Traveled Anywhere on Leisure



### Oregon Visitors who Traveled Anywhere on Business



\*Leisure Travelers: Oregon visitors who took a pleasure, vacation or personal trip of at least 50 miles, one way, from home or that included an overnight stay in the past 12 months.

\*\*Business Travelers: Oregon visitors who took a business/convention trip of at least 50 miles, one way, from home or that included an overnight stay in the past 12 months.

Base: 770 Oregon Visitors  
Source: Travel Oregon

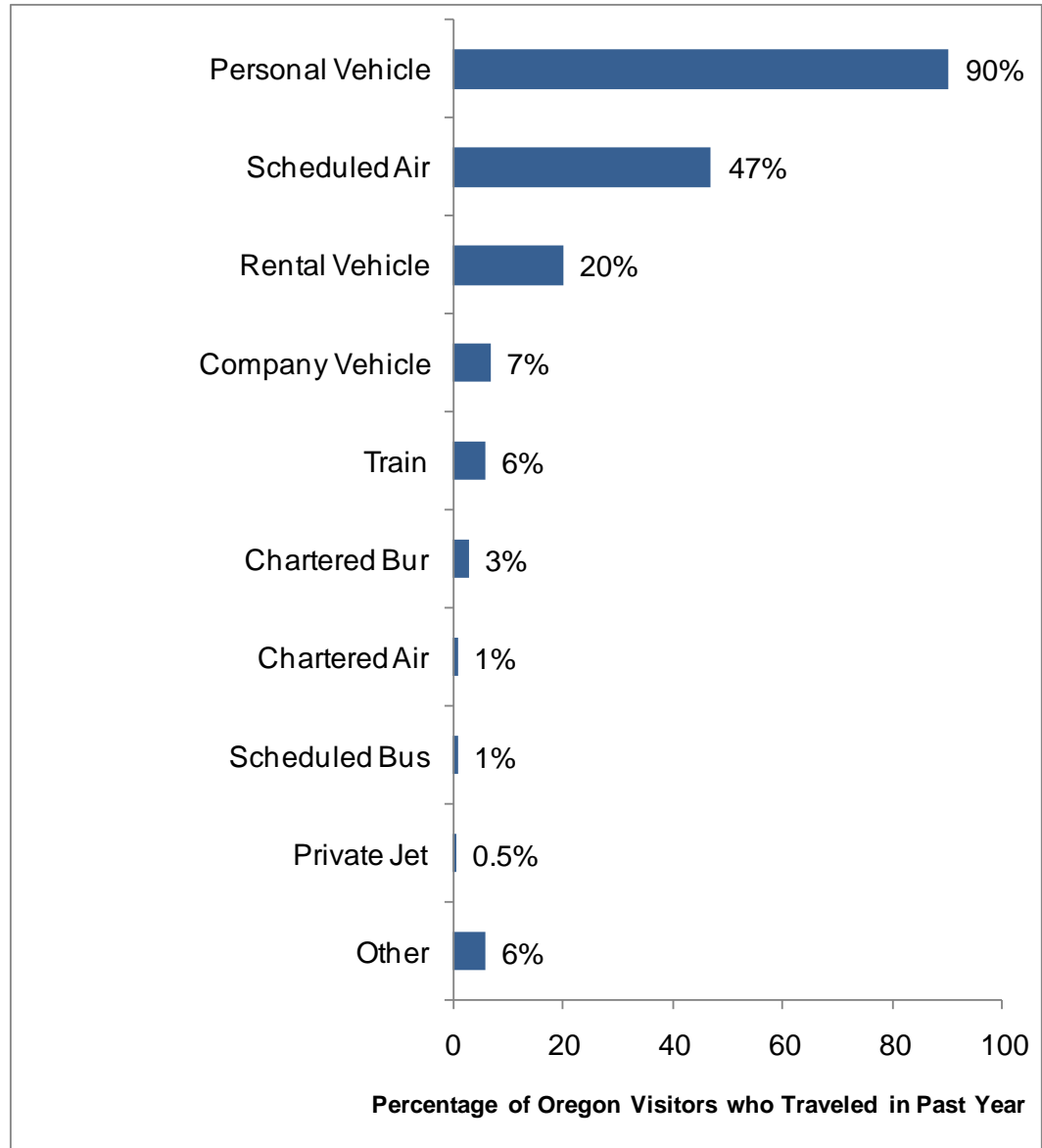
**Figure 1.2**  
**Oregon Visitors' Use of**  
**Transportation in Past 12 Months**

Ø The majority (90%) of U.S. adults who visited Oregon traveled in their personal vehicles on trips made anywhere in the past 12 months.

Ø Nearly half flew on scheduled airlines at least once, but much smaller percentages used the various other modes.

Ø Individuals with high HH incomes and college grads were more likely than Oregon visitors in general to use air, rental cars and company vehicles. (See page 23)

**Oregon Visitors' Use of Transportation in Past Year**



Base: 697 Oregon Visitors who traveled in the past year  
 Source: Travel Oregon

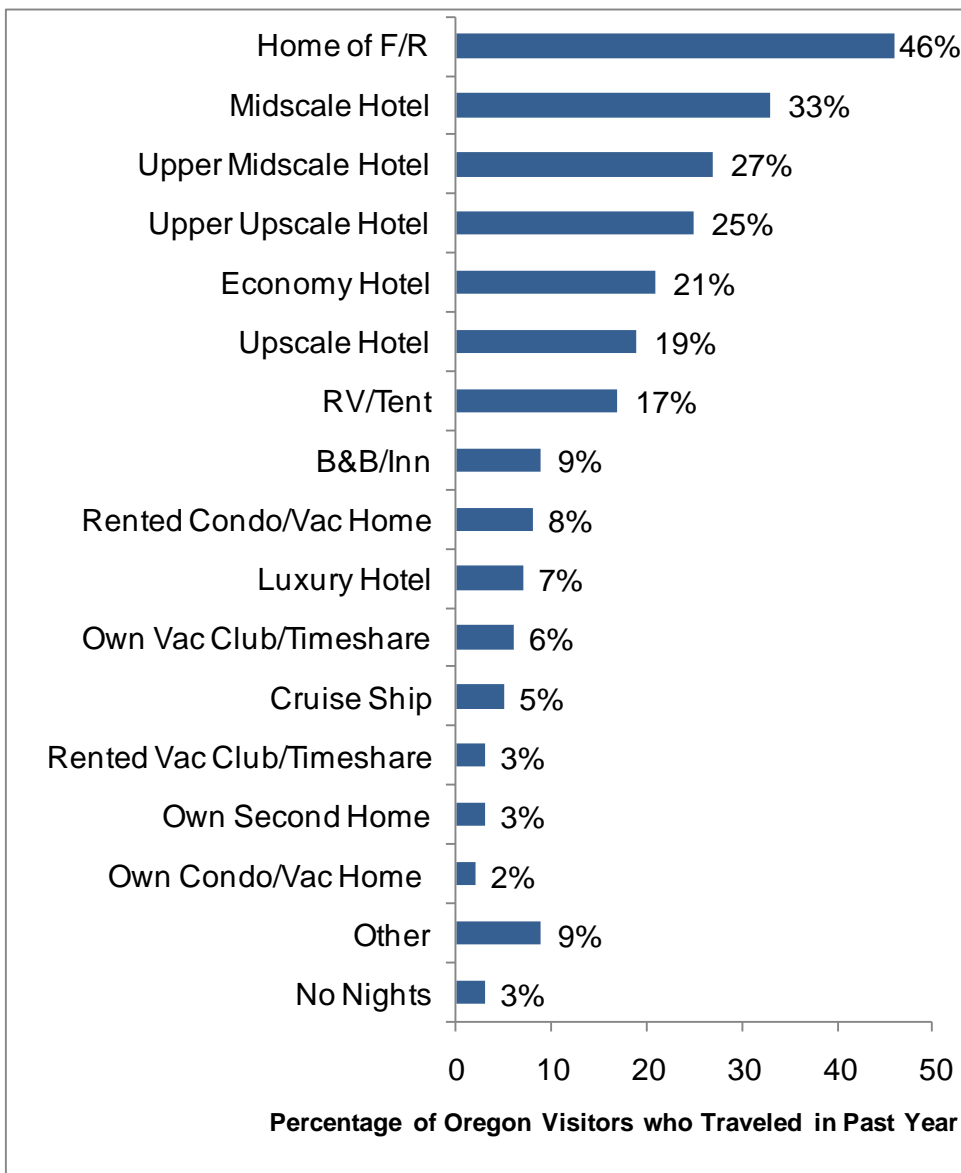
**Figure 1.3**  
**Oregon Visitors' Use of Overnight Accommodations in Past 12 Months**

Ø Nearly half of all Oregon visitors stayed with family and friends on their trips around the U.S. and elsewhere in the past year.

Ø Many also used hotels, with midscale properties (e.g., Best Western, Quality Inn/Suites) (33%), upper midscale properties (e.g., Comfort Inn/Suites, Holiday Inn/Express) (27%) and/or upper upscale properties (e.g., Hilton, Hyatt, Marriott) (25%) being most popular.

Ø High income travelers showed significantly above-average propensities to use all types of hotels (except economy), especially upper upscale (53%) and luxury properties (14%), as well as B&Bs/inns (20%).

Ø Out-of-state Oregon visitors and those with high spending on Oregon products also reported significantly greater usage of upscale properties. (See page 24)



Base: 697 Oregon Visitors who traveled in the past year.  
 Source: Travel Oregon

**Figure 1.4**  
**Past Year Travel Behavior of Oregon Visitors**  
**Index Values**

Travel in Past Year Anywhere	Men	Women	18-34	35-64	65+	High Income*	Low Income*	College Grad	Less than College	Adult Only HH	HH with Kids
Took 5+ Leisure Trips	101	100	108	96	103	155	72	126	77	105	88
Took 5+ Business Trips	140	75	136	92	72	229	37	157	49	93	116
Used Air	115	90	109	98	93	164	63	133	69	105	87
Used Rental Car	135	78	113	104	65	180	52	135	68	102	97
Stayed in Luxury Hotel	134	77	137	87	87	193	53	134	67	103	90
Stayed in Upper Upscale Hotel	112	92	107	102	81	215	45	145	57	94	115
Stayed in Economy Hotel	130	81	79	112	84	93	98	113	87	108	78

\* High Income = Annual HH income > \$100,000+ ; Low Income = Annual HH Income < \$50,000

Note: See Appendix for description of how this Index is calculated. Items with an Index value of 125 or above are highlighted in red. For example, the 180 shown under the High Income column for "Used Rental Car" means that high income visitors were 80% more likely than Oregon visitors overall to use a rental car on any trip in the past year.

Source: Travel Oregon

**Figure 1.5**  
**Past Year Travel Behavior of Oregon Visitors**  
**Index Values**

Travel in Past Year Anywhere	In-state	Out-of-State	OR Leisure Visitor	OR Bus. Visitor	4+ on Unique OR Prod.	OR Culinary Activities*	Bought OR Products	High Spend**	4+ OR Satisf.	Bought OR Products at Home	OR Visit Influence
Took 5+ Leisure Trips	90	108	121	133	101	118	122	119	100	104	112
Took 5+ Business Trips	44	156	83	299	100	124	120	151	96	105	121
Used Air	77	119	96	90	100	117	115	119	98	99	99
Used Rental Car	70	118	100	116	90	107	109	129	92	100	91
Stayed in Luxury Hotel	61	132	73	130	109	139	114	197	89	104	107
Stayed in Upper Upscale Hotel	61	131	85	99	96	111	117	141	90	102	89
Stayed in Economy Hotel	94	107	110	123	103	99	98	82	105	101	103

\* OR Culinary Activities = Toured wineries, toured breweries, drove a wine trail, attended a wine festival, sought out restaurants with local food, visited farmers markets, sampled artisan foods, attended a culinary festival, fine dining/culinary activities, took a cooking class.

\*\* High Spend = Spent \$201+ on Oregon products during most recent Oregon trip.

Note: See Appendix for description of how this Index is calculated. Items with an Index value of 125 or above are highlighted in red. For example, the 156 shown under the Out-of-State column for "Took 5+ Business Trips" means that out-of-state visitors were 56% more likely than Oregon visitors overall to have taken 5+ business trips anywhere in the past year.

Source: Travel Oregon



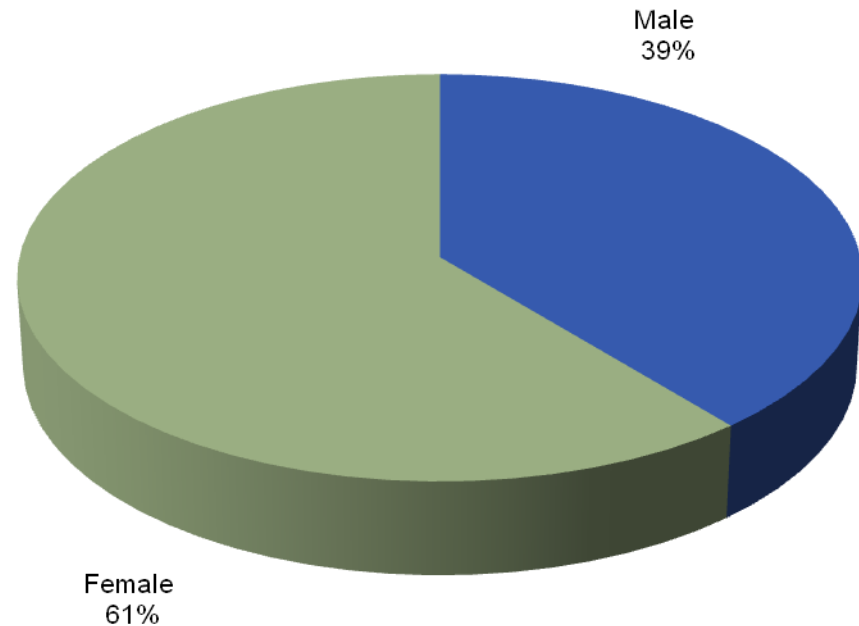
## **Section II.**

# **Demographics of Oregon Visitors**

## Gender of Oregon Visitors

### Figure 2.1 Gender of Oregon Visitors

- Ø Over 60% of Oregon visitors responding to the survey were women, while 39% were men.
- Ø Leisure travelers to Oregon in the past year were more likely to be women (62%) than those visiting for business or to attend a convention (54%).



Percentage of Oregon Visitors

### Age of Oregon Visitors

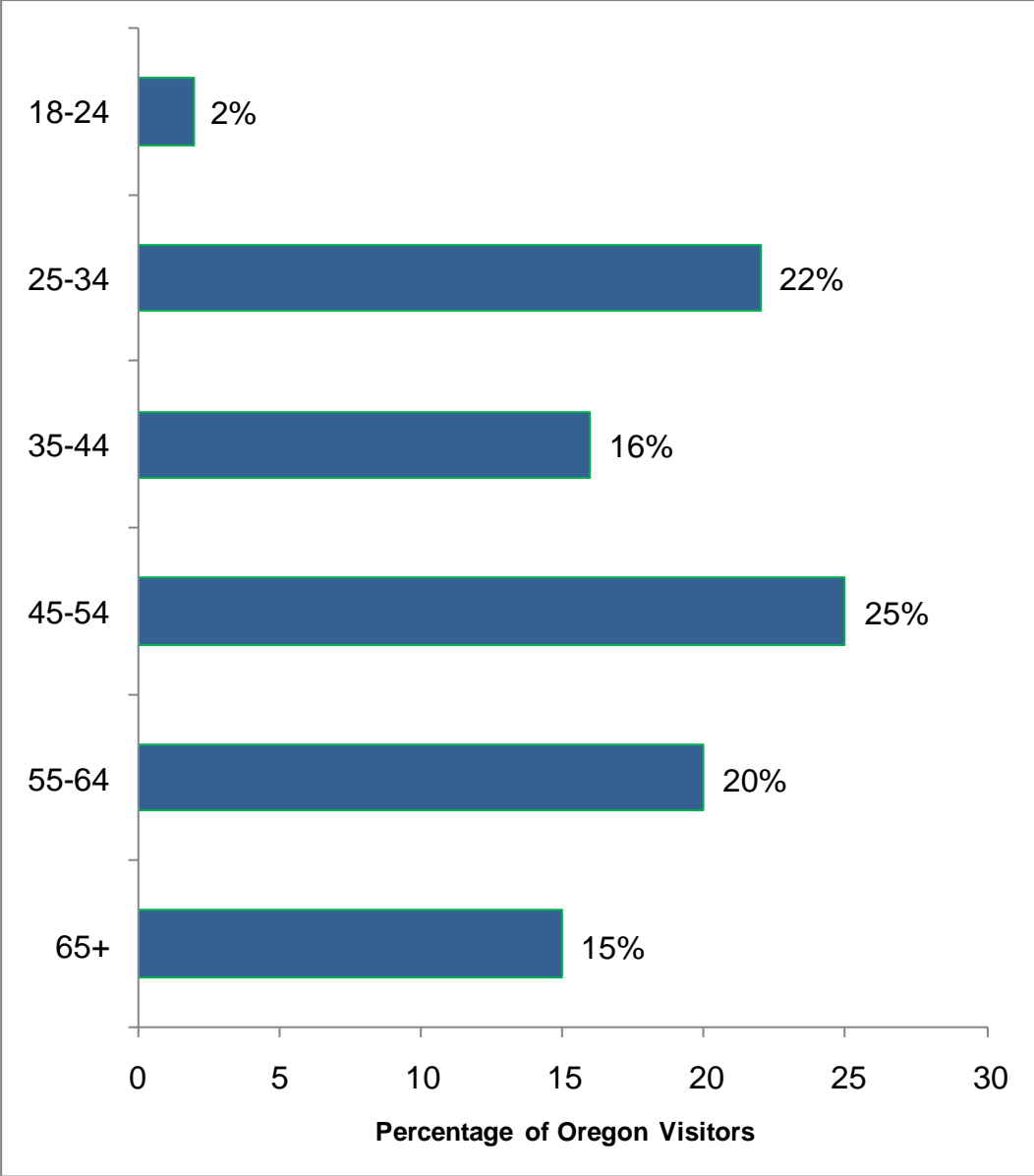
**Figure 2.2**  
**Age Distribution of Oregon Visitors**

Ø Oregon visitors tended to be somewhat older than travelers in general. Nearly half of all visitors to Oregon included in this study were Boomers, between the ages of 45 and 64 (45%), as compared to 38% of all U.S. leisure travelers, according to *travelhorizons*™.

Ø Those between the ages of 35 and 44 (mostly GenXers) comprised 16 percent of the market.

Ø Millennials (those under age 35) made up about one-quarter of Oregon’s visitors.

Ø Less than two-in-ten Oregon visitors reported being 65 years of age or older.



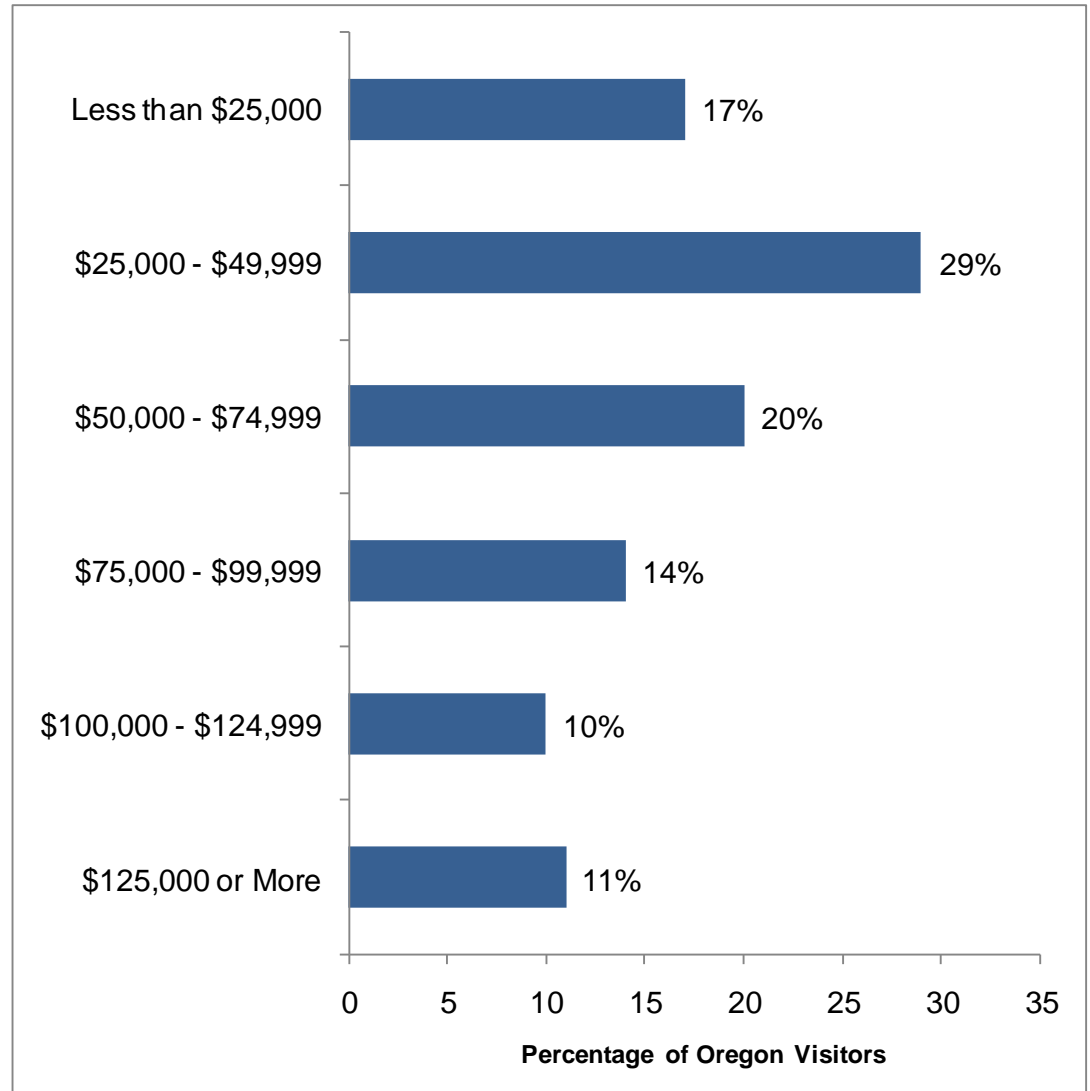
Mean = 48.3 years

Base: 770 Oregon Visitors  
Source: Travel Oregon

## Annual HH Income of Oregon Visitors

### Figure 2.3 Income Distribution of Oregon Visitors

- Ø Two-thirds of Oregon visitors reported household incomes of \$75,000 or less per year.
- Ø But nearly one-quarter said their households earned \$100,000 or more annually.
- Ø In fact, more than 10 percent of these Oregon visitor households earned \$125,000 or more per year.
- Ø Perhaps surprisingly, leisure visitors to Oregon reported higher incomes (mean = \$69,700) than did those visiting for business purposes (mean = \$64,700). Out-of-state visitors reported above-average incomes with a mean of \$79,400, as compared to only \$55,500 among in-state visitors.
- Ø Those engaged in culinary activities, as well as those buying and spending the most on Oregon products were also well above average on income.



**Mean = \$68,600**  
**Median = \$56,000**

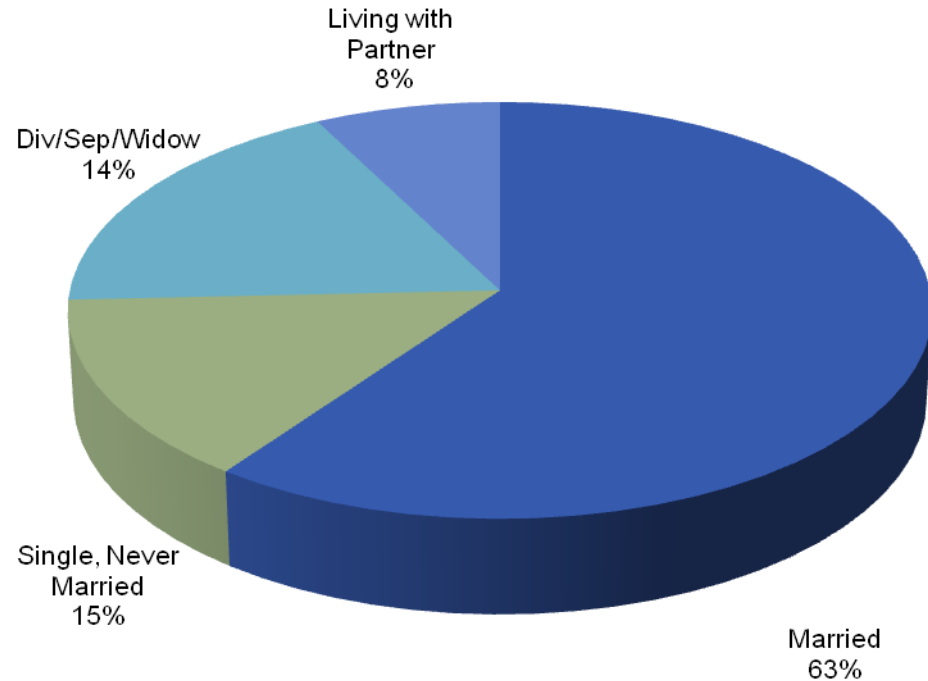
## Marital Status of Oregon Visitors

### Figure 2.4 Marital Status of Oregon Visitors

Ø Most Oregon visitors were married (63%) and an additional 8% were living with a partner. These are somewhat higher shares than among all U.S. travelers, as measured by *travelhorizons*™.

Ø Nearly one-in-five (15%) said they were single (never married).

Ø Almost as many reported being divorced, separated or widowed (14%).



Percentage of Oregon Visitors

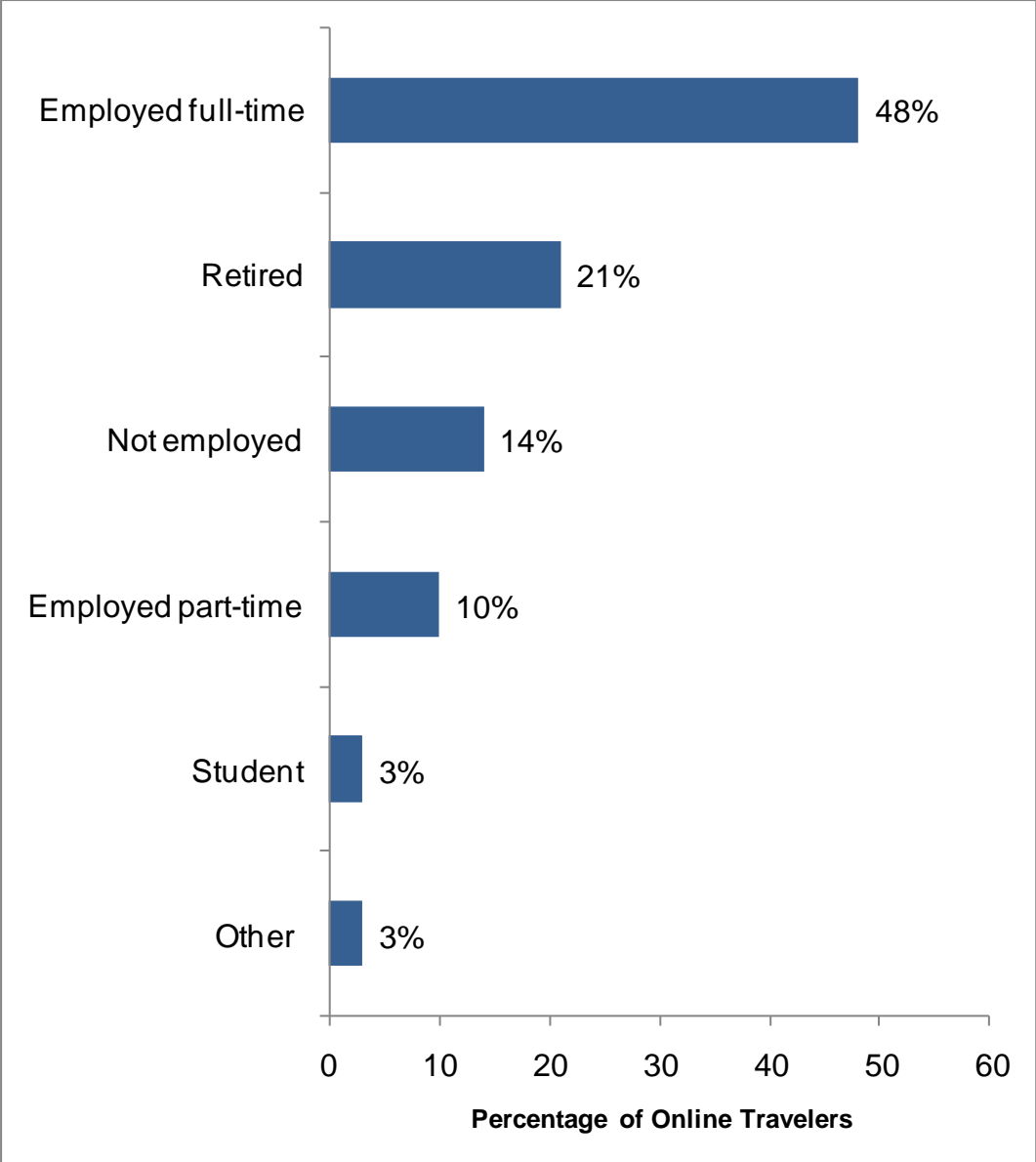
# Employment Status of Oregon Visitors

**Figure 2.5**  
**Employment Status of Oregon Visitors**

Ø Nearly half of all Oregon visitors were employed full-time or self-employed.

Ø Another nearly 10% were employed part-time.

Ø About one-in-five reported being retired, about the same as among all U.S. travelers.



Base: 770 Oregon visitors  
Source: Travel Oregon

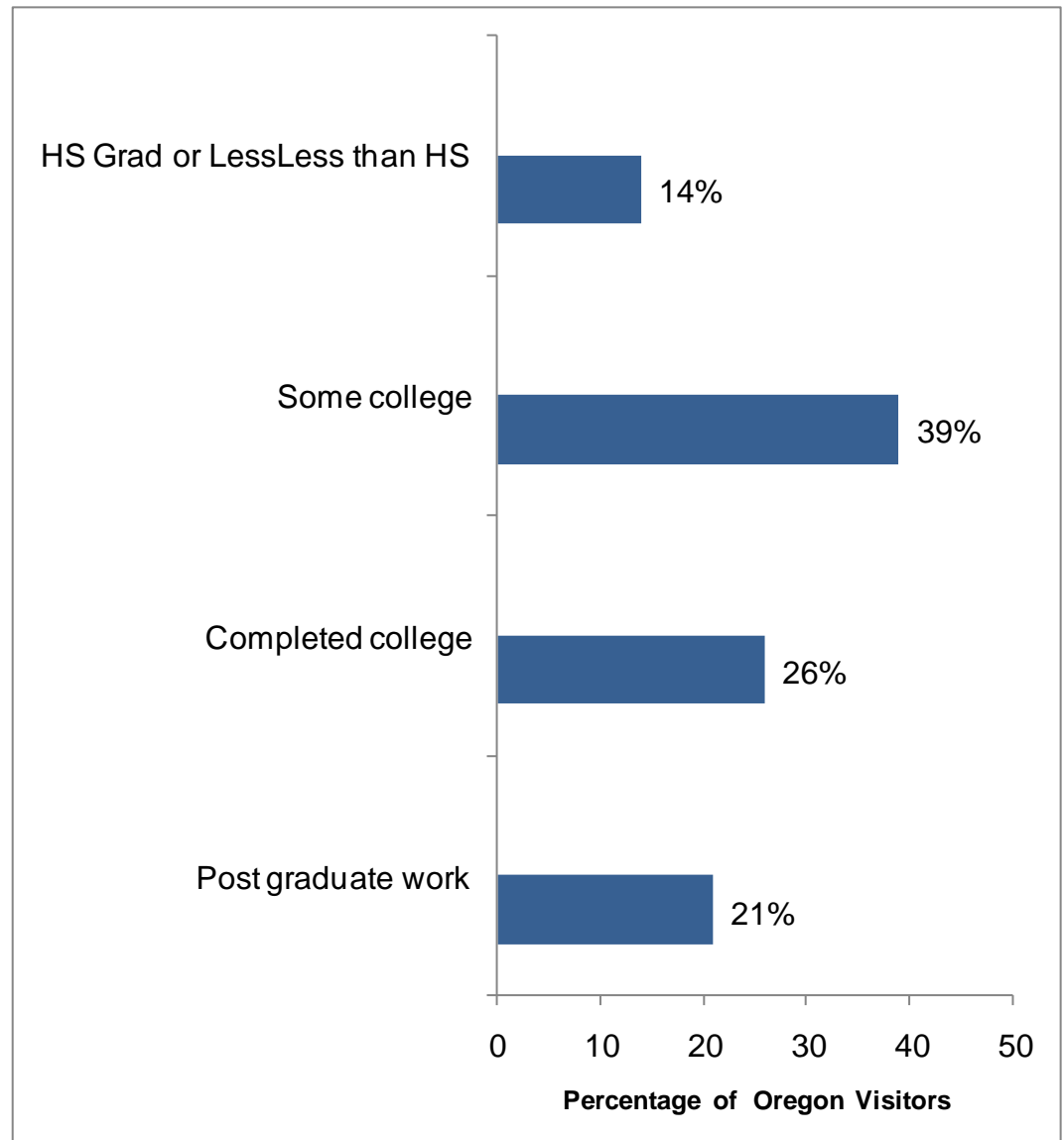
## Education of Oregon Visitors

### Figure 2.6 Education Level of Oregon Visitors

Ø Travelers in general tend to skew toward higher educational attainment more than the U.S. adult population overall. 29% of all U.S. leisure travelers have a college education or more.

Ø This is even more pronounced among Oregon visitors. Nearly half reported having completed college or more, with nearly one-quarter having done post-graduate work (as compared to only 13 percent of all U.S. leisure travelers).

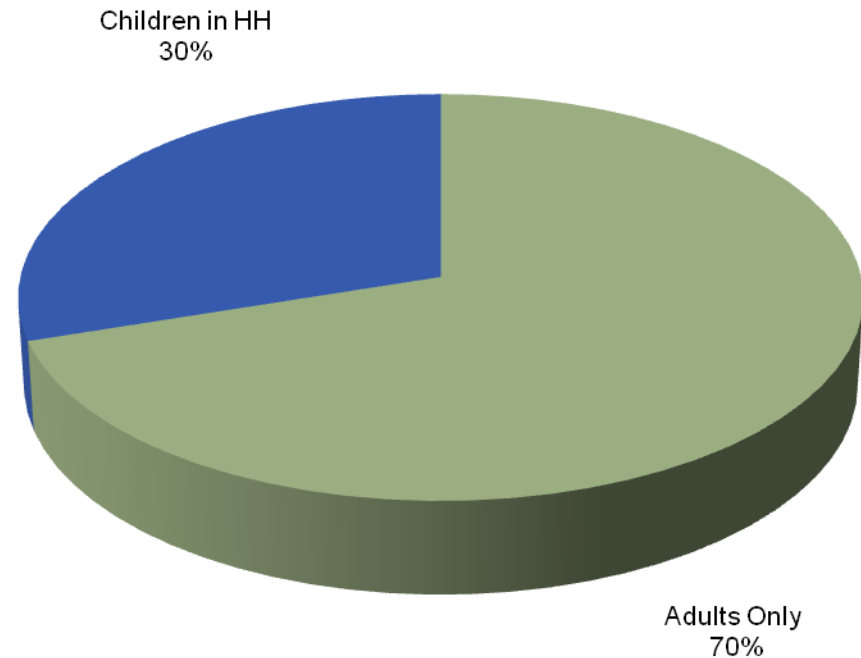
Ø Only just over one-in-ten said they were a high school graduate or less.



## Household Structure of Oregon Visitors

### Figure 2.7 Oregon Visitor Households – With and Without Children

- ∅ Most Oregon visitors lived in households with adults only (70%).
- ∅ Less than one-third of visitors said there are children under the age of 18 living in their household. This compared to 26% of all U.S. leisure travelers who have children in their households.



Percentage of Oregon Visitors



## Region of Residence of Oregon Visitors

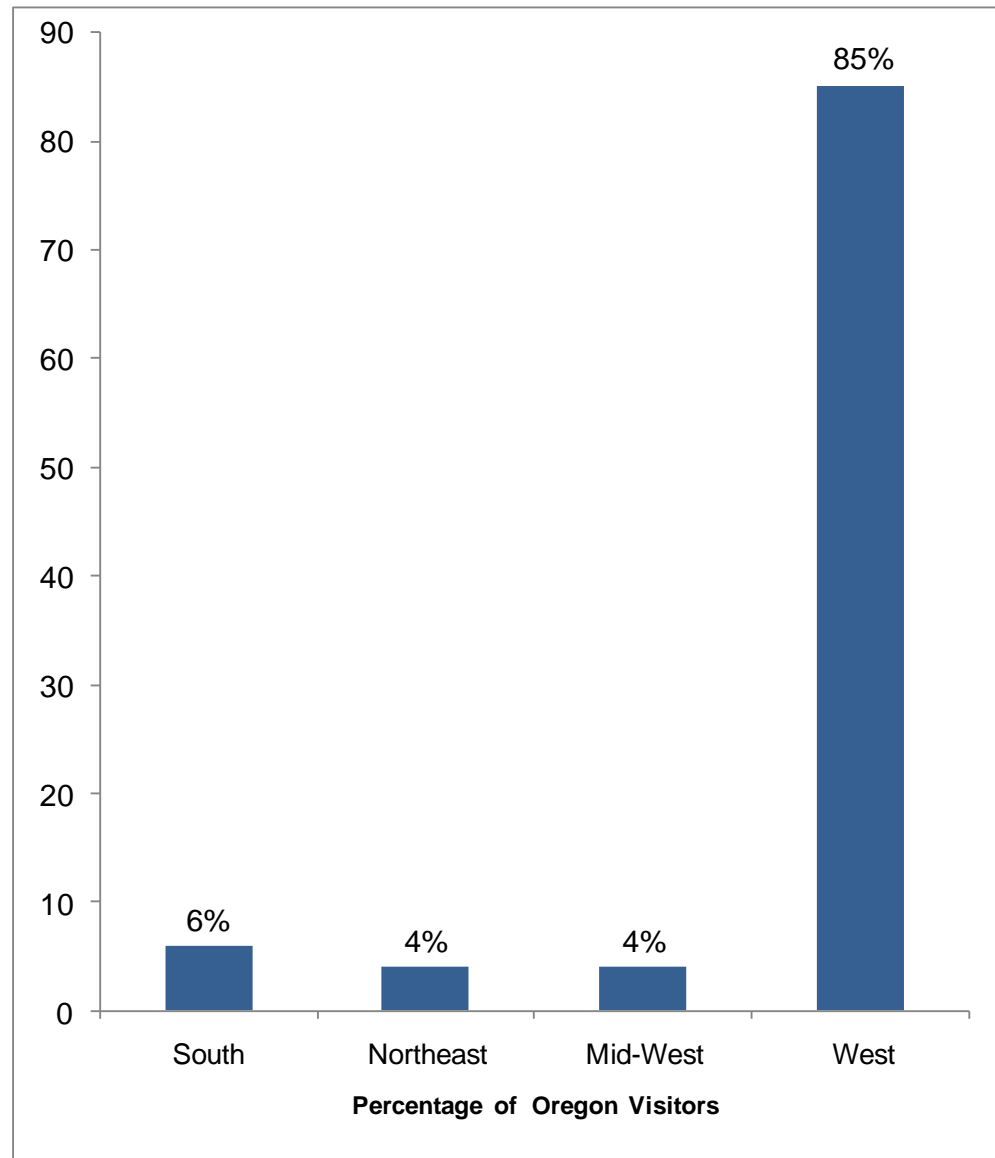
### Figure 2.8 Region of Residence of Oregon Visitors

Ø The vast majority of respondents in this sample of Oregon visitors came from the West region\* (85%).

Ø Longwoods International also found that Oregon visitors (on “marketable trips”) were concentrated in the western U.S. In 2009, 96% of day visitors and 87% percent of overnight visitors to Oregon were from the Pacific region (a smaller region that the West region shown here).

Ø Nearly half (49%) were in-state residents, 19% came from Washington and 10% resided in California.

Ø According to Longwoods, 55% of overnight “marketable” trips to Oregon were made by its residents.



\*Regions are defined in Appendix.  
Base: 770 Oregon Visitors  
Source: Travel Oregon



## **Section III.**

# **Characteristics of Oregon Trips**

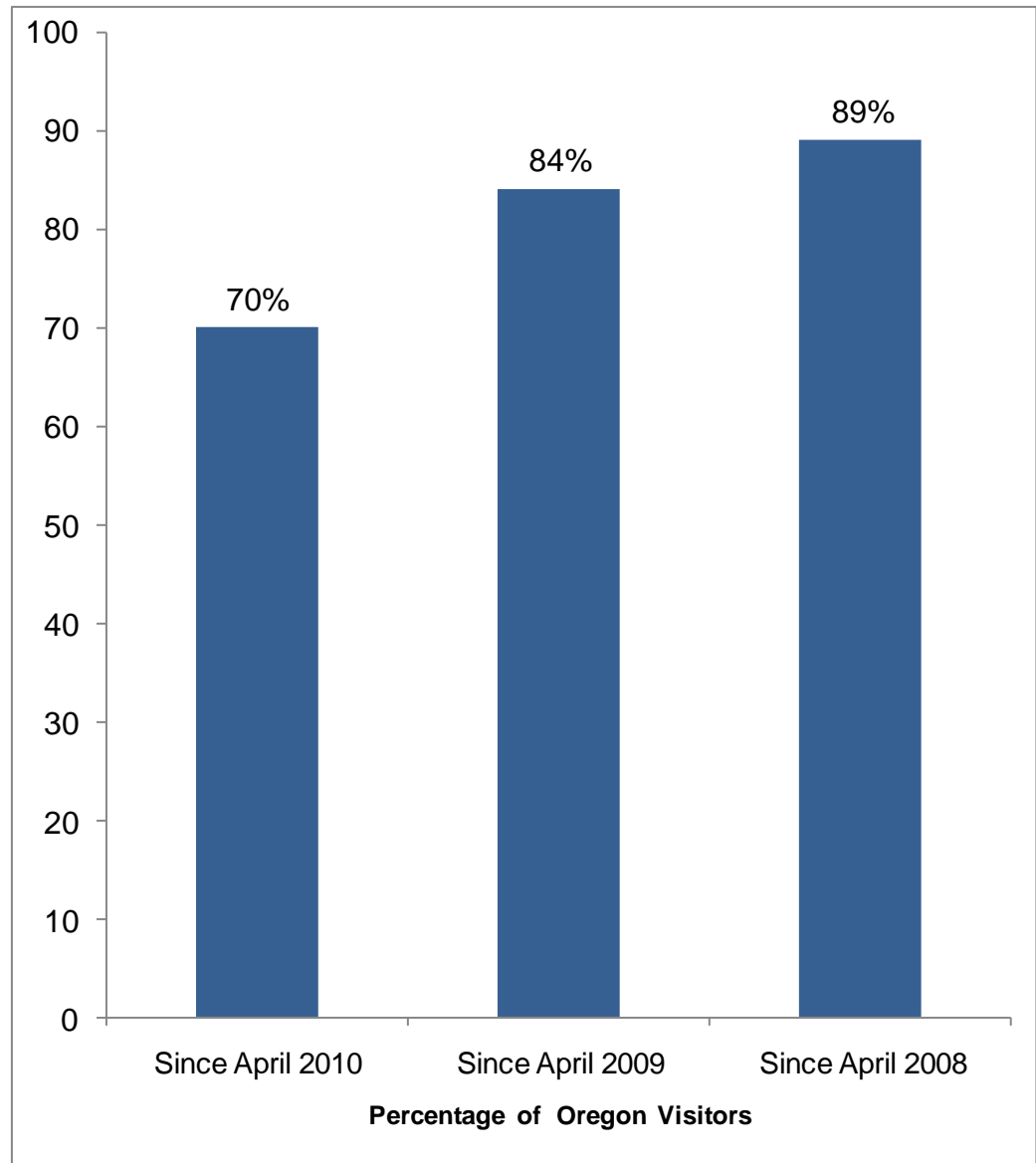
## When Visited Oregon

### Figure 3.1 When Visited Oregon

∅ The Oregon visitors surveyed had fairly recent Oregon travel experiences to report.

∅ Nearly 90% said they had visited the state percent since April 2008.

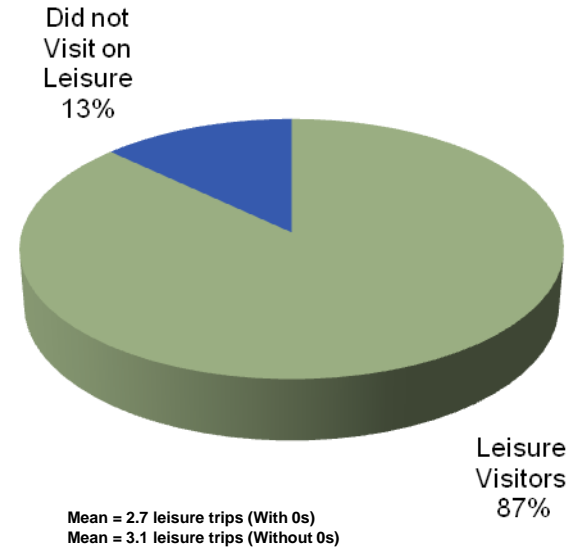
∅ And, 70% visited Oregon in the past year – that is, since April 2010.



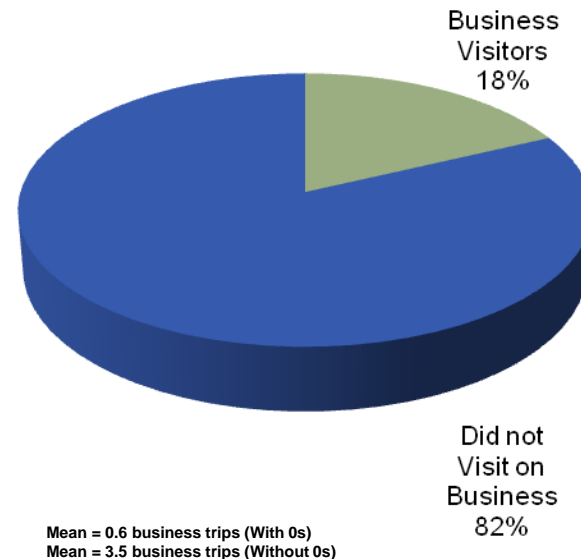
### Figure 3.2 Visitation to Oregon in the Past Year

- ∅ Among those who have visited Oregon in the past year, most visited at least once for leisure (87%). They made an average of about 3 leisure visits each. Younger visitors were more likely than average to take 5+ leisure trips to Oregon in the past year (21%).
- ∅ Also, those who participated in culinary activities in Oregon (21%), bought Oregon products (23%) and were high spenders on these (28%) were more likely to be frequent leisure visitors. (See page 39)
- ∅ 18% of past year visitors came to Oregon at least once on business or to attend a convention. Those who did, made an average of 3.5 business visits each since April 2010.

#### Past Year Visitors who Visited Oregon for Leisure



#### Past Year Visitors who Visited Oregon on Business



\*Leisure Travelers: Oregon visitors who took a pleasure, vacation or personal trip of at least 50 miles, one way, from home or that included an overnight stay in the past 12 months.  
 \*\*Business Travelers: Oregon visitors who took a business/convention trip of at least 50 miles, one way, from home or that included an overnight stay in the past 12 months.  
 Base: 548 Past Year Oregon Visitors  
 Source: Travel Oregon

**Figure 3.3**  
**Oregon Travel Behavior**  
**Index Values**

Travel in Past Year Anywhere	Men	Women	18-34	35-64	65+	High Income*	Low Income*	College Grad	Less than College	Adult Only HH	HH with Kids
Visited Since April 2010	100	100	99	101	99	98	100	99	100	97	108
Visited Since April 2009	99	101	102	100	96	96	100	100	100	98	105
Visited Since April 2008	100	100	104	99	98	105	97	102	98	99	102
Leisure Trips to OR in Past Year	98	102	99	100	100	107	93	101	99	99	102
5+ Leisure Trips to OR in Past Year	77	115	132	92	81	99	104	100	101	90	124
Business Trip to OR in Past Year	117	90	123	92	96	91	115	103	98	96	110
5+ Business Trips to OR in Past Year	89	106	124	95	76	119	89	100	100	100	97

\* High Income = Annual HH income > \$100,000+; Low Income = Annual HH Income < \$50,000

Note: See Appendix for description of how this Index is calculated. Items with an Index value of 125 or above are highlighted in red. For example, the 132 shown under the 18-34 column for "5+ Leisure Trips to OR in Past Year" means that those aged 18–34 were 32% more likely than Oregon visitors overall to have taken 5 or more leisure trips to Oregon since April 2010.

Source: Travel Oregon

**Figure 3.4**  
**Oregon Travel Behavior**  
**Index Values**

Travel in Past Year Anywhere	In- state	Out-of- State	OR Leisure Visitor	OR Bus. Visitor	4+ on Unique OR Prod.	OR Culinary Activities	Bought OR Products	High Spend	4+ OR Satisf.	Bought OR Products at Home	OR Visit Influence
Visited Since April 2010	118	85	142	142	103	104	107	101	103	106	101
Visited Since April 2009	105	94	119	119	102	105	105	101	102	104	102
Visited Since April 2008	100	99	112	112	102	104	104	101	101	103	100
Leisure Trip to OR in Past Year	95	106	116	101	105	104	105	111	102	104	102
5+ Leisure Trips to OR in Past Year	120	83	115	116	109	129	145	173	99	112	144
Business Trip to OR in Past Year	95	113	101	550	110	117	116	150	98	99	137
5+ Business Trips to OR in Past Year	65	154	84	543	81	135	138	184	89	114	160

\* OR Culinary Activities = Toured wineries, toured breweries, drove a wine trail, attended a wine festival, sought out restaurants with local food, visited farmers markets, sampled artisan foods, attended a culinary festival, fine dining/culinary activities, took a cooking class.

\*\* High Spend = Spent \$201+ on Oregon products during most recent Oregon trip.

Note: See Appendix for description of how this Index is calculated. Items with an Index value of 125 or above are highlighted in red. For example, the 184 shown under the High-Spend column for "5+ Business Trips to OR in Past Year" means that high spend visitors were 56% more likely than Oregon visitors overall to have taken 5+ business trips to Oregon in the past year.

## Figure 3.5 Activities of Oregon Visitors

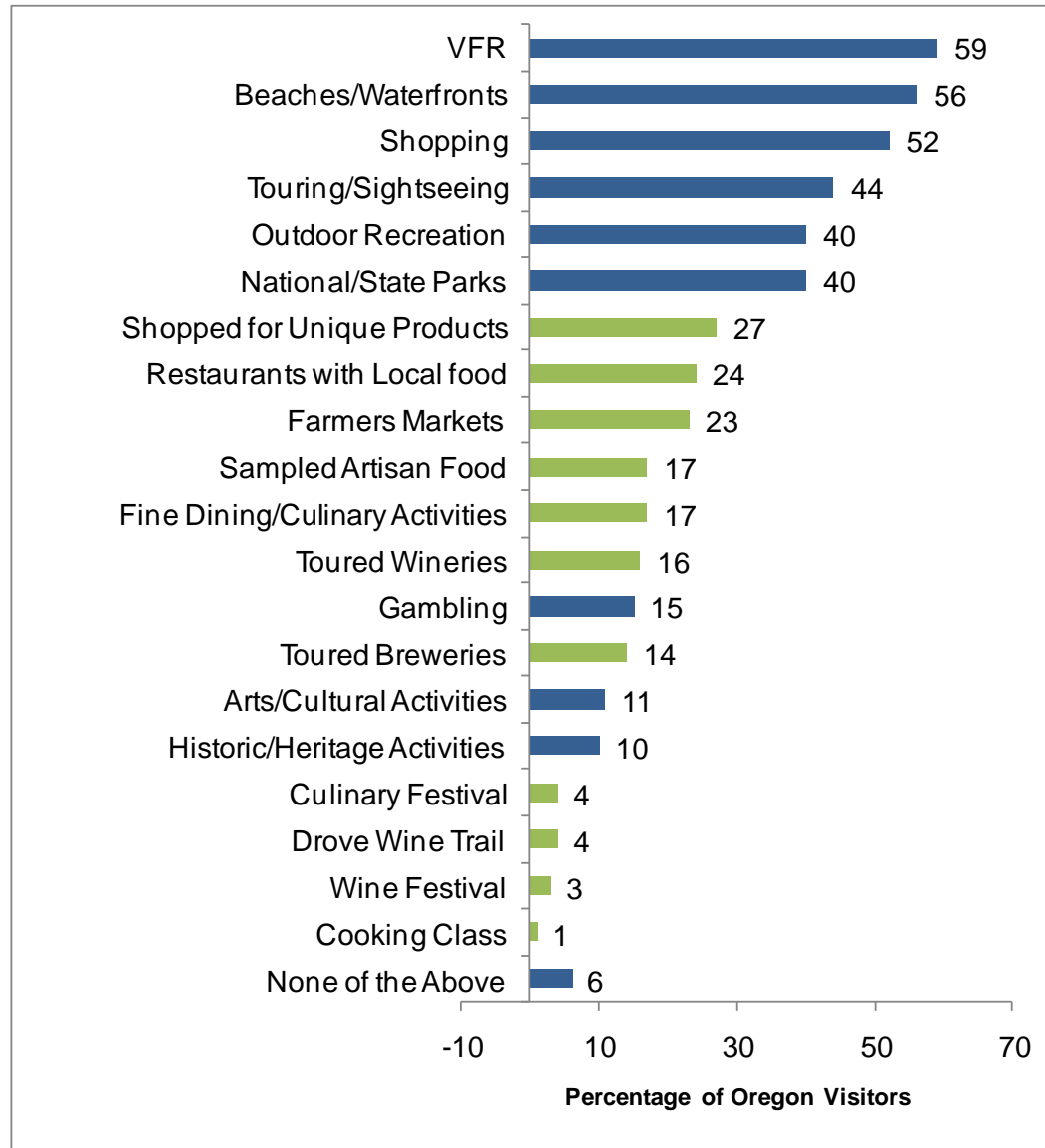
∅ The top activities among Oregon visitors are typical of most U.S. travelers and included visiting friends and relatives, visiting beaches and waterfronts, and shopping, all reported by more than half of Oregon visitors. These were followed by activities related to sightseeing, recreation and visiting national/state parks, each attracting about four-in-ten visitors.

∅ Activities related to Oregon's unique products, especially food items and activities, were also quite popular - approximately one-quarter reported that they shopped for unique local products, sought out restaurants serving local cooking and/or visited Farmers Markets. Smaller but still quite significant shares enjoyed sampling other Oregon-produced foods and related activities.

∅ There were many differences in propensity to do these activities among various demographic and behavior/attitudinal groups. (See pages 41-42)

Base: 770 Oregon Visitors  
Source: Travel Oregon

## Activities of Oregon Visitors





**Figure 3.6**  
**Oregon Selected Visitor Activities**  
**Index Values**

	Men	Women	18-34	35-64	65+	High Income*	Low Income*	College Grad	Less than College	Adult Only HH	HH with Kids
Shopping	86	109	117	94	98	104	98	103	97	97	108
Shopped for Unique OR Products	93	105	109	99	91	11	85	107	94	104	91
Sought out Restaurants Serving Local Foods	80	113	90	100	115	132	77	115	85	107	82
Farmers Markets	78	114	102	95	116	109	96	110	91	97	109
Sampled Artisan Food	66	122	89	97	144	108	90	102	98	103	92
Fine Dining/Culinary Activities	80	113	87	193	108	167	75	115	88	105	87
Toured Wineries	104	98	65	104	139	163	54	128	76	112	67
Toured Breweries	102	99	122	191	63	128	80	141	64	113	65
Culinary Festivals	95	102	91	112	72	114	88	116	86	112	72
Drove Wine Trail	120	89	131	77	137	157	57	189	20	125	26
Wine Festival	42	136	107	97	94	184	58	107	94	126	29

\* High Income = Annual HH income > \$100,000+ ; Low Income = Annual HH Income < \$50,000

Note: See Appendix for description of how this Index is calculated. Items with an Index value of 125 or above are highlighted in red. For example, the 191 shown under the 35 – 64 column for "Toured Breweries" means that those aged 35-64 were 91% more likely than Oregon visitors overall to have toured breweries during their recent trips to Oregon.

Source: Travel Oregon

**Figure 3.7**  
**Oregon Selected Visitor Activities**  
**Index Values**

Travel in Past Year Anywhere	In-state	Out-of-State	OR Leisure Visitor	OR Bus. Visitor	4+ on Unique OR Prod.	OR Culinary Activities	Bought OR Products	High Spend	4+ OR Satisf.	Bought OR Products at Home	OR Visit Influence
Shopping	109	93	113	124	110	121	123	144	104	116	111
Shopped for Unique OR Products	102	100	109	116	125	157	149	170	113	124	157
Sought out Restaurants Serving Local Food	106	89	115	142	135	189	152	204	111	130	135
Farmers Markets	141	63	105	119	135	189	161	176	112	127	174
Sampled Artisan Food	115	83	119	155	142	190	175	212	117	134	167
Fine Dining/Culinary activities	108	87	117	116	124	189	157	207	106	124	140
Toured Wineries	99	94	119	120	135	189	177	217	115	123	157
Toured Breweries	116	84	117	83	129	189	178	154	108	192	154
Culinary Festivals	130	61	88	112	154	191	167	293	119	140	158
Drove Wine Trail	109	91	97	48	149	189	189	300	117	137	206
Wine Festival	165	39	123	300	132	187	177	210	107	142	152

\* OR Culinary Activities = Toured wineries, toured breweries, drove a wine trail, attended a wine festival, sought out restaurants with local food, visited farmers markets, sampled artisan foods, attended a culinary festival, fine dining/culinary activities, took a cooking class.

\*\* High Spend = Spent \$201+ on Oregon products during most recent Oregon trip.

Note: See Appendix for description of how this Index is calculated. Items with an Index value of 125 or above are highlighted in red. For example, the 293 shown under the High Spend column for "Culinary Festivals" means that those spending \$201 or more on Oregon products during their visit were 193 percent more likely than Oregon visitors overall to have attended a Culinary Festival during their recent trips to Oregon.

**Section IV.**  
**Oregon Visitor Behavior and Attitudes**  
**Related to Oregon Products**

## Product Categories Associated with Oregon

### Figure 4.1 Unaided Awareness of Oregon Products

Ø Oregon seems best known for its food products, mentioned unaided by 44% of Oregon visitors.

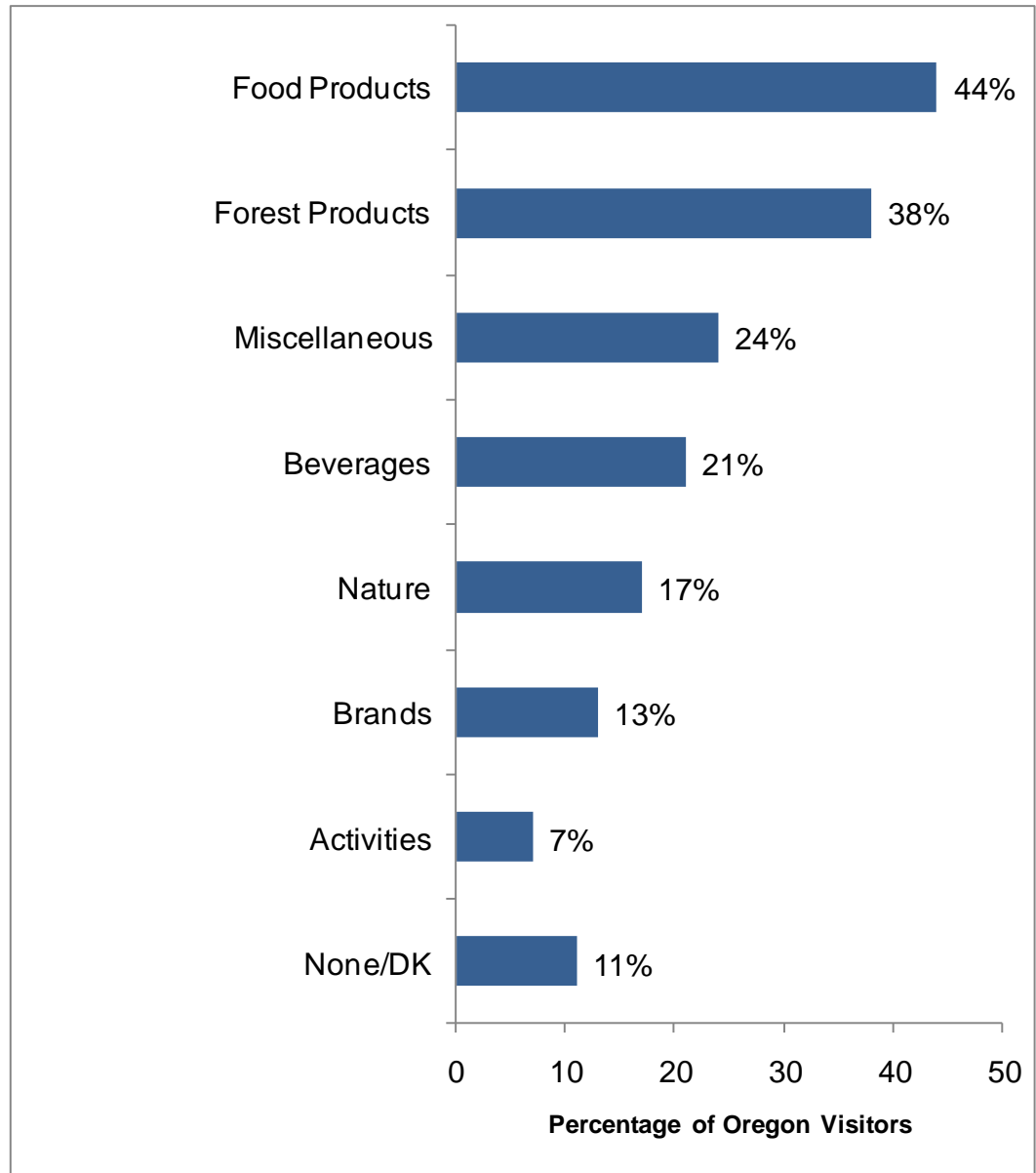
Ø Forest products come in second (38%), followed by a miscellaneous category that includes products ranging from Pendleton woolens to Christmas trees (24%).

Ø Beverages rank as the fourth most mentioned product group (21%).

Ø Interestingly, when asked open-ended, many mentioned plants including roses and grass seed, as well as elements of the natural environment, such as beaches and the Oregon coastline.

Ø About one-in ten mentioned iconic Oregon brands (e.g., Nike, Columbia sportswear) and/or activities (e.g. fishing, camping).

Ø Only about 10 percent were not able to mention any products they associate with the state.



## Food Products Associated with Oregon

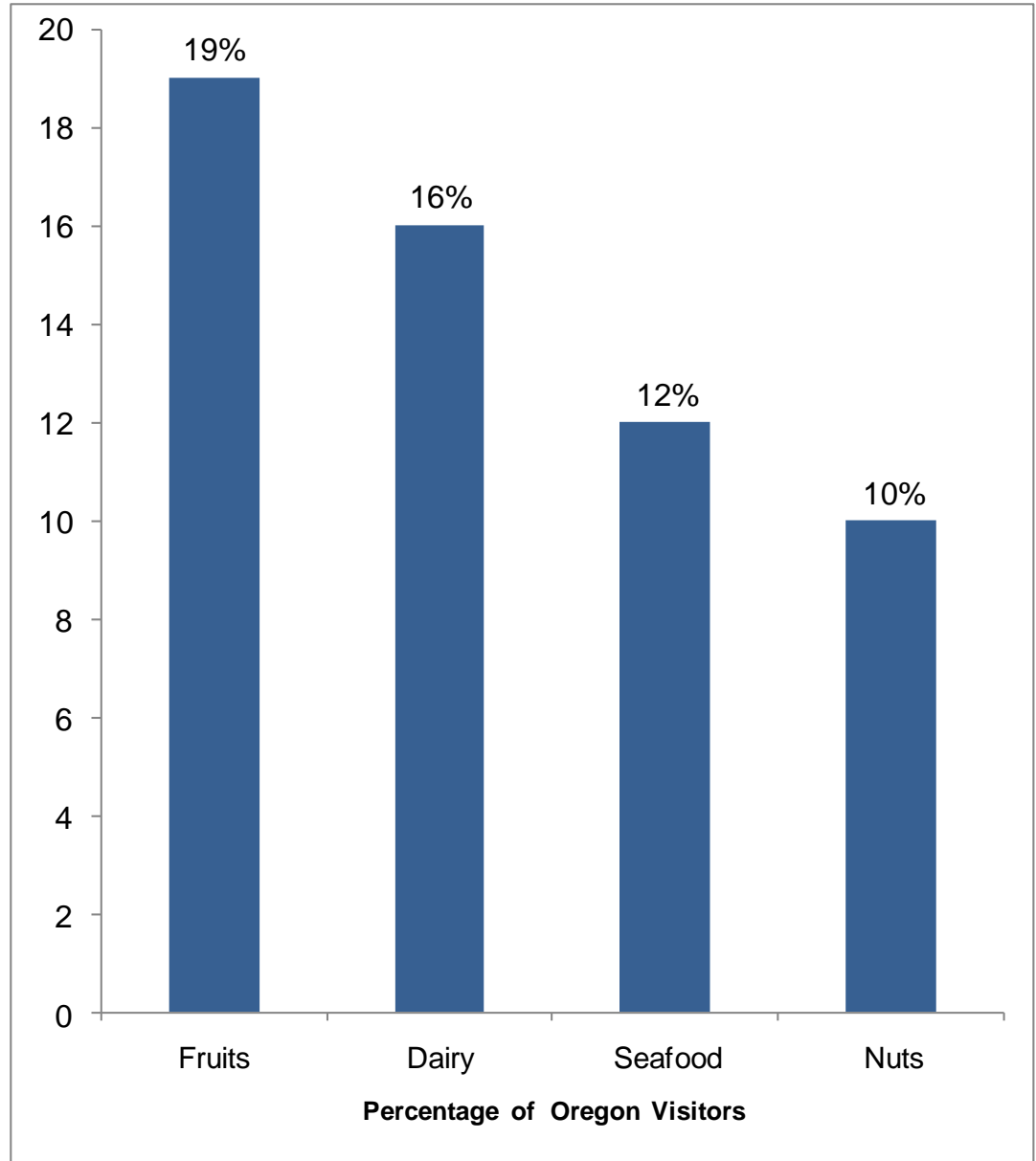
### Figure 4.2 Food Products Associated with Oregon

Ø Top-of-mind awareness was greatest for Oregon's food products, mentioned by 44% of visitors.

Ø The leading food group mentioned was fruits (19%), with nearly twice the number of mentions as nuts (10%).

Ø 16% mentioned dairy products – most of this was cheese (14%).

Ø Not surprisingly, perhaps, women were significantly more likely to mention food products (50%), as were older (55%) and retired (52%) visitors.



### Figure 4.3 Beverages Products Associated with Oregon

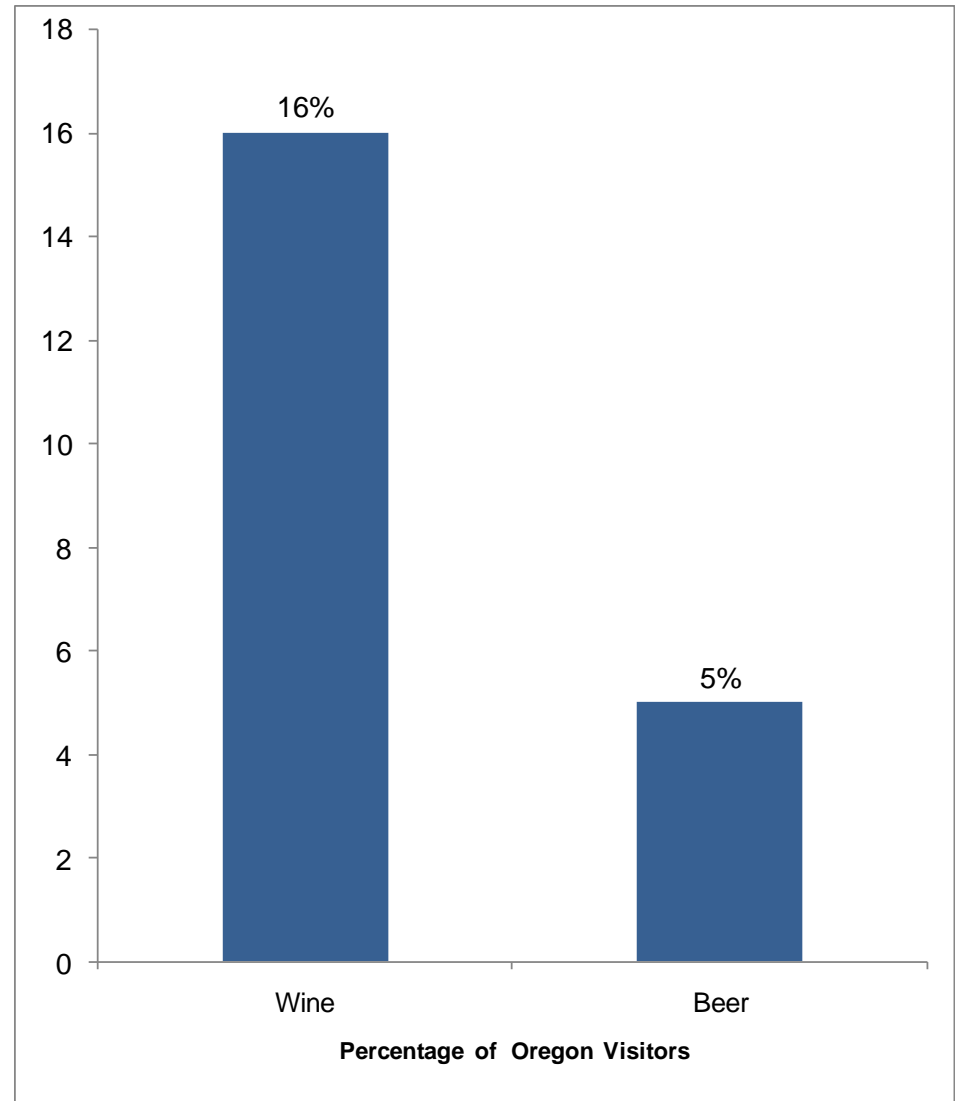
Ø More than two-in-ten Oregon visitors mentioned beverages when asked to name products associated with the state.

Ø Three times as many mentioned wine (16%) as mentioned beer (5%).

Ø Older (30%), high income (29%) and college educated (27%) visitors were more likely to mention beverages, especially wine.

Ø Some groups reported above-average propensities to mention certain categories and specific products. These are summarized on pages 47-48.

### Beverage Products Associated with Oregon



**Figure 4.4**  
**Unaided Awareness of Oregon Products**  
**Index Values**

	Men	Women	18-34	35-64	65+	High Income	Low Income	College Grad	Less than College	Adult Only HH	HH with Kids
Food Products	80	118	66	107	124	93	94	97	104	99	103
Forest Products	120	88	70	106	124	98	106	102	99	103	91
Miscellaneous Products	88	108	105	98	99	120	100	107	92	105	89
ØPendleton Woolens	79	114	72	107	121	145	66	138	69	93	117
Beverages	99	101	53	107	148	141	75	133	71	105	87
ØWine	99	100	53	106	153	147	76	127	77	107	80
ØBeer	136	76	61	108	111	140	76	179	29	96	111
Nature	115	91	99	100	101	68	109	93	105	104	91
Brands	106	95	93	117	43	85	87	113	88	101	96
Activities	101	100	107	100	96	97	83	110	93	110	76

\* High Income = Annual HH income > \$100,000+ ; Low Income = Annual HH Income < \$50,000

Note: See Appendix for description of how this Index is calculated. Items with an Index value of 125 or above are highlighted in red. For example, the 153 shown under the 65+ column for "Wine" means that those aged 65 or over were 53% more likely than Oregon visitors overall to mention wine.

Source: Travel Oregon

**Figure 4.5**  
**Unaided Awareness of Oregon Products**  
**Index Values**

	In-state	Out-of-State	OR Leisure Visitor	OR Bus. Visitor	4+ on Unique OR Prod.	OR Culinary Activities	Bought OR Products	High Spend	4+ OR Satisf.	Bought OR Products at Home	OR Visit Influence
Food Products	109	94	108	98	116	121	118	132	106	112	102
Forest Products	139	65	109	94	106	89	96	84	102	102	101
Miscellaneous Products	112	87	116	123	113	113	112	148	106	113	110
ØPendleton Woolens	114	86	141	310	117	135	131	145	107	131	128
Beverages	105	88	123	147	135	141	140	136	113	119	128
ØWine	101	91	123	157	135	143	137	125	111	116	131
ØBeer	128	62	123	134	147	143	168	136	117	140	159
Nature	102	104	106	124	95	99	102	135	101	103	124
Brands	151	56	122	143	123	115	125	62	106	119	74
Activities	139	74	119	96	84	91	116	146	101	86	89

\*OR Culinary Activities = Toured wineries, toured breweries, drove a wine trail, attended a wine festival, sought out restaurants with local food, visited farmers markets, sampled artisan foods, attended a culinary festival, fine dining/culinary activities, took a cooking class.

\*\* High Spend = Spent \$201+ on Oregon products during most recent Oregon trip.

Note: See Appendix for description of how this Index is calculated. Items with an Index value of 125 or above are highlighted in red. For example, the 168 shown under the Bought OR Products column for "beer" means that those who bought Oregon products during their visit were 68% more likely than Oregon visitors overall to mention beer.

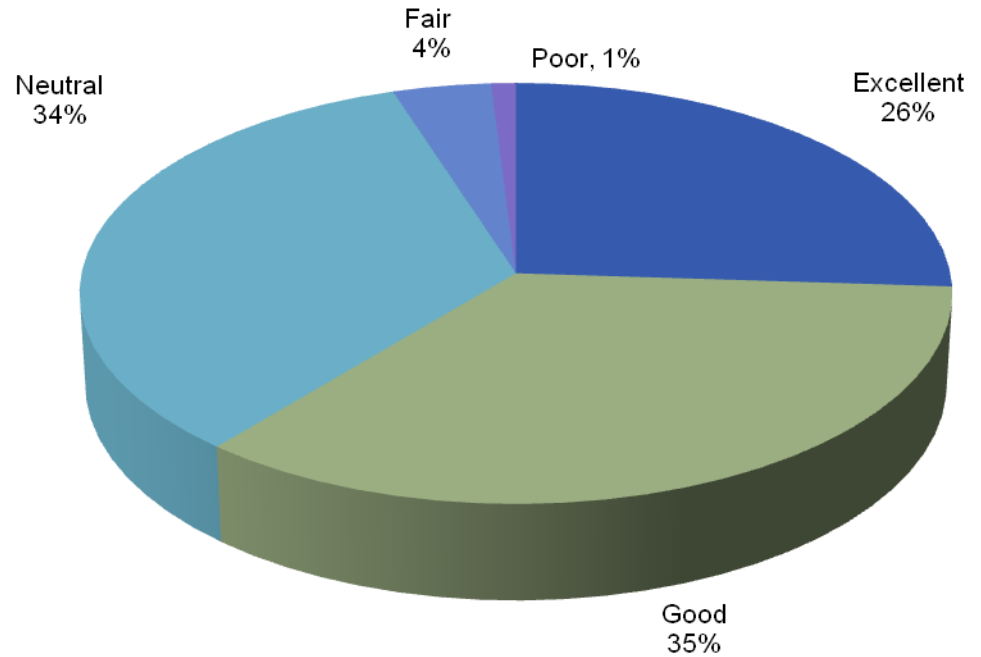
Source: Travel Oregon



### Figure 4.6 Rating of Oregon in Terms of Offering Unique Products

- Ø Six-in-ten Oregon visitors rate the state as excellent or good, as compared to other destinations, in its offerings of unique food, wine and other culinary products.
- Ø Only 5% rate Oregon as fair or poor on this attribute.

### Rating of Oregon in Terms of Unique Products



Percentage of Oregon Visitors

## Figure 4.7 Purchases Made by Oregon Visitors During Visit

Ø About one-third of Oregon visitors bought items they could have bought anywhere, and more than one-quarter bought inexpensive souvenirs.

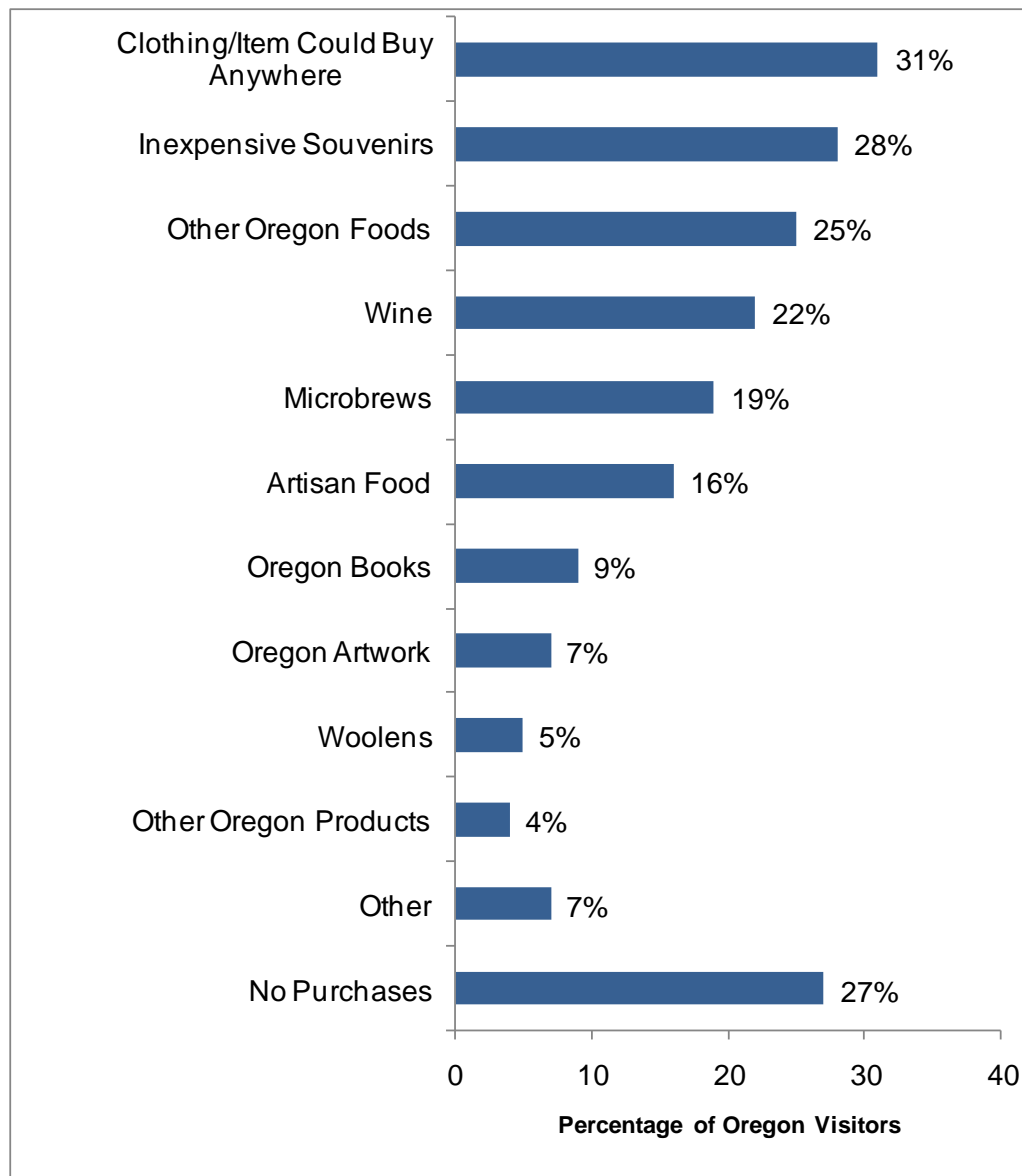
Ø But, rather significant shares also bought items unique to the state and locally produced. Topping the list were wine (22%), microbrews (19%) and other Oregon foods (25%).

Ø Smaller percentages reporting buying crafts and others local items such as books about Oregon (9%), artwork by Oregon artists (7%) and woolen items, such as those produced by Pendleton (5%).

Ø Older, upper income and college educated visitors were more likely than average to purchase a number of these products. (See page 51).

Ø Also those engaged in culinary activities in the state, those rating Oregon most positively on its unique products and high spenders also showed elevated product purchases for many items. (See page 52).

### Purchases Made by Oregon Visitors During Visit



**Figure 4.8**  
**Oregon Visitor Selected Purchases**  
**Index Values**

	Men	Women	18-34	35-64	65+	High Income*	Low Income*	College Grad	Less than College	Adult Only HH	HH with Kids
Other OR Food Products	90	105	70	106	124	123	90	101	99	100	99
Wine	109	95	70	100	147	167	80	133	70	108	78
Microbrews	114	90	151	89	63	129	88	139	66	101	96
Artisan Food	76	115	68	101	147	122	96	97	103	98	104
Or Books	110	92	39	112	144	113	100	82	117	107	79
OR Artwork	81	11	132	81	119	134	96	111	88	103	91
Woolens	92	106	83	91	165	146	96	123	82	98	108
Other OR Products	74	119	19	117	167	141	117	119	86	119	50
No Purchases	106	96	118	99	75	73	107	77	121	99	103

\* High Income = Annual HH income > \$100,000+ ; Low Income = Annual HH Income < \$50,000

Note: See Appendix for description of how this Index is calculated. Items with an Index value of 125 or above are highlighted in red. For example, the 165 shown under the 65+ column for "Woolens" means that those aged 65 or over were 65% more likely than Oregon visitors overall to buy woolen products during their recent visits to Oregon.

Source: Travel Oregon

**Figure 4.9**  
**Oregon Visitor Selected Purchases**  
**Index Values**

	In-state	Out-of-State	OR Leisure Visitor	OR Bus. Visitor	4+ on Unique OR Prod.	OR Culinary Activities	Bought OR Products	High Spend	4+ OR Satisf.	Bought OR Products at Home	OR Visit Influence
Other OR food products	110	88	122	145	133	148	189	212	111	119	137
Wine	113	78	119	92	137	172	189	163	111	122	144
Microbrews	109	90	107	136	116	161	189	187	100	129	117
Artisan food	108	91	119	126	143	169	188	253	114	137	153
OR Books	137	66	110	213	133	169	189	256	117	121	167
OR Artwork	118	89	120	204	137	164	188	318	119	131	143
Woolens	113	199	199	256	125	160	190	354	115	148	156
Other OR Products	110	98	102	133	133	162	191	226	112	124	193
No Purchases	97	107	78	64	69	35	0	0	85	72	63

\*OR Culinary Activities = Toured wineries, toured breweries, drove a wine trail, attended a wine festival, sought out restaurants with local food, visited farmers markets, sampled artisan foods, attended a culinary festival, fine dining/culinary activities, took a cooking class.

\*\* High Spend = Spent \$201+ on Oregon products during most recent Oregon trip.

Note: See Appendix for description of how this Index is calculated. Items with an Index value of 125 or above are highlighted in red. For example, the 318 shown under the High Spend column for "Oregon artwork" means that those who spent \$201 or more on Oregon products during recent visits were 218% more likely than Oregon visitors overall to have purchased Oregon artwork during their recent visits to Oregon.

Source: Travel Oregon

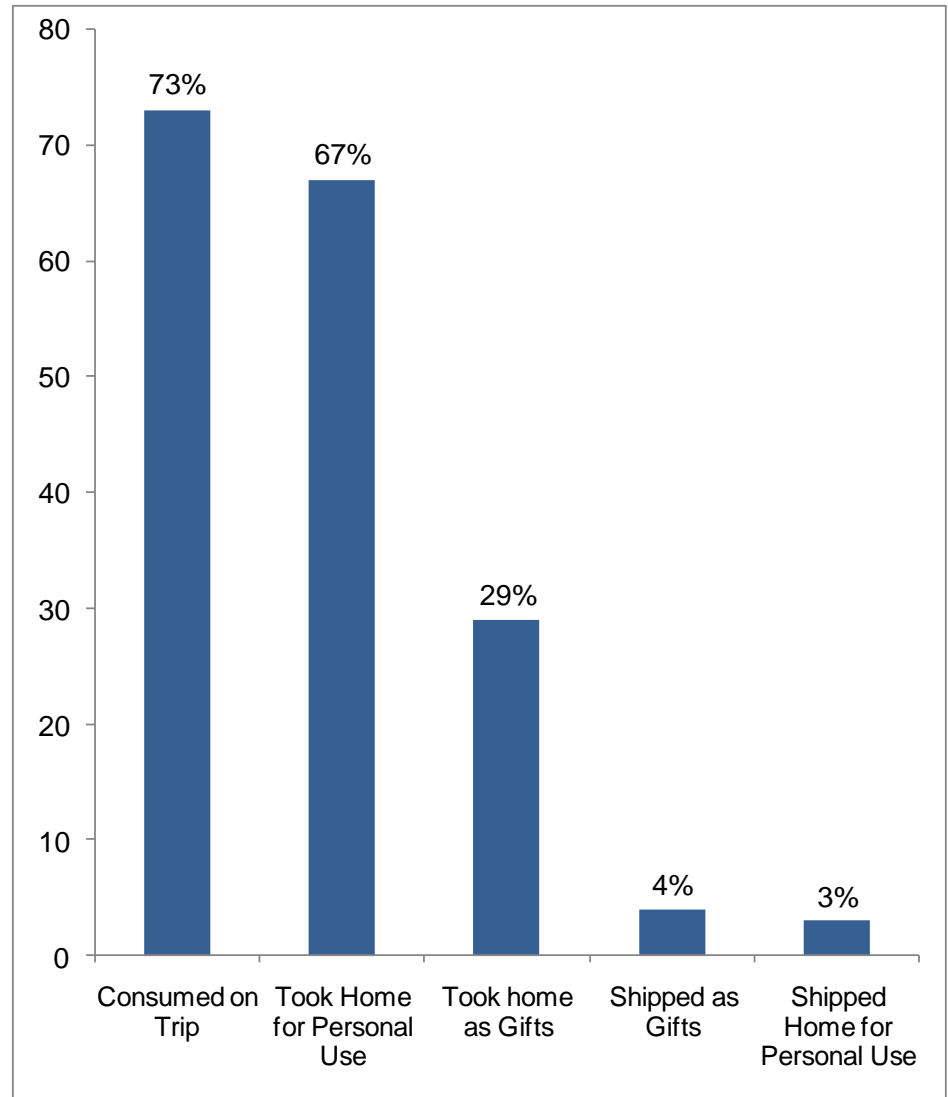
## Actions Taken with Food Products Purchased

### Figure 4.10 Actions Taken with Food Products Purchased

Ø About half of all Oregon visitors purchased food/beverage items while visiting. Most of them (73%) consumed these while on their trip.

Ø Many also took food and beverage products home for their own enjoyment (67%) or to give as gifts (29%).

Ø Very small percentages shipped Oregon food/beverage products as gifts or to their homes for their own use.

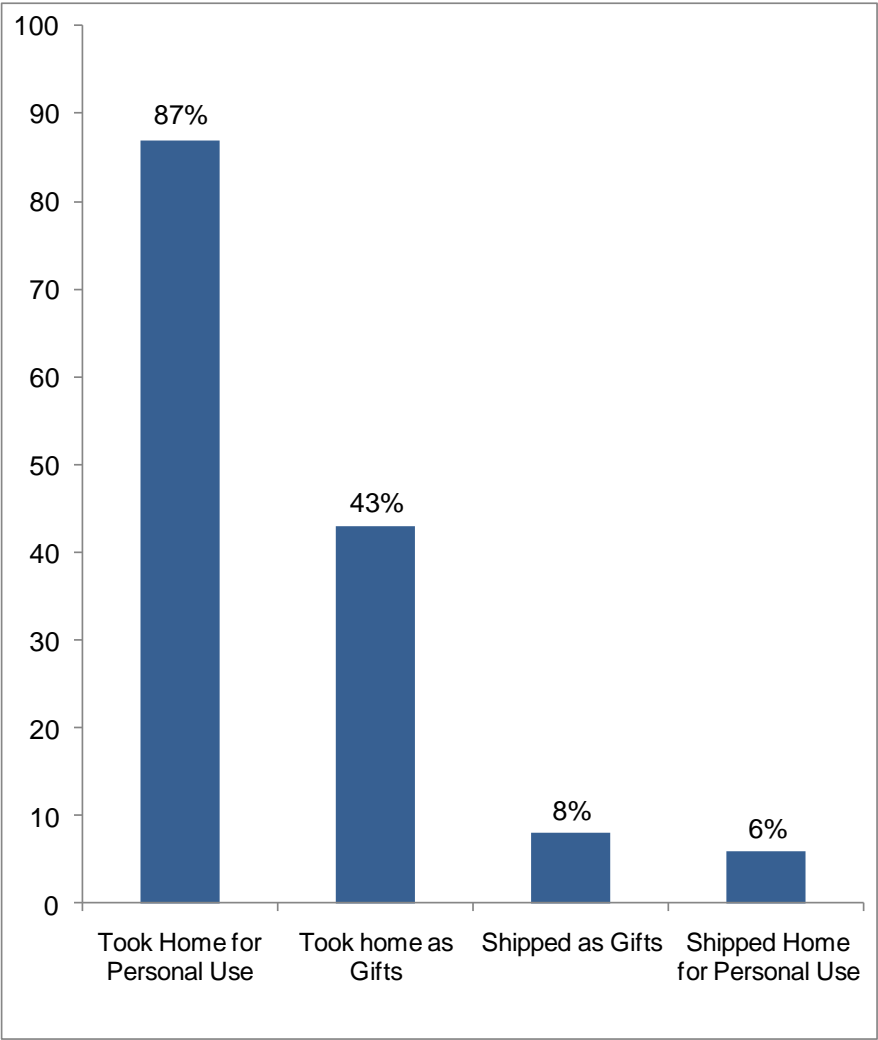


Percentage of Oregon Visitors who Bought Oregon Foods

### Actions Taken with Other Products Purchased

#### Figure 4.11 Actions Taken with Other Products Purchased

- Ø Nearly one-quarter (22%) of Oregon visitors reported buying other Oregon products, such as woolens, Oregon books and artwork and other locally produced items.
- Ø The majority of these visitors took these purchases home for their own enjoyment (87%) or for gifts (43%).
- Ø A somewhat larger share of this group than those who bought food/beverage items, shipped them to friends and family as gifts (8%) or to their own home (6%).

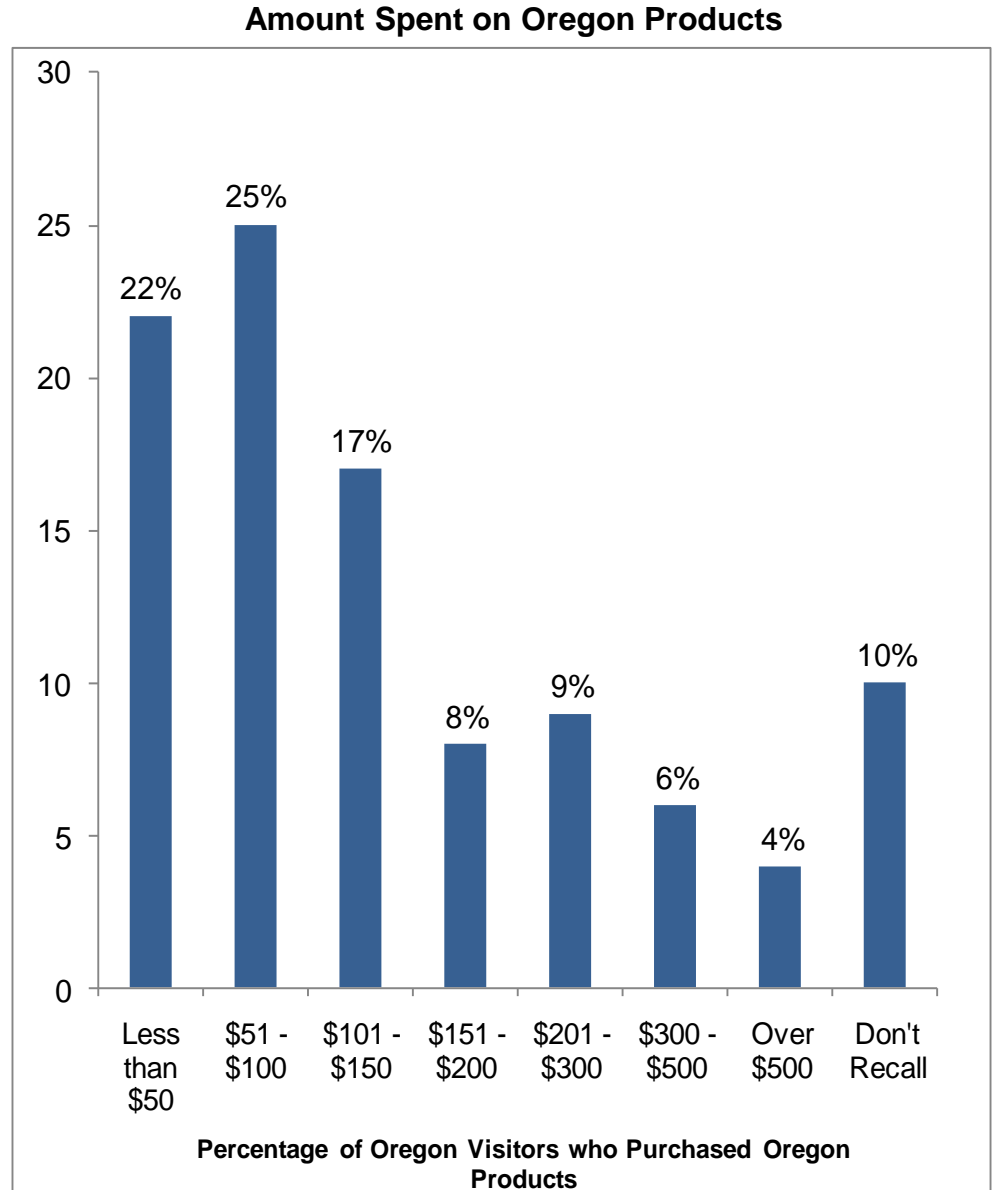


Percentage of Oregon Visitors who Bought Oregon Non-Food Products

Base: 168 Oregon visitors who purchased non-food Oregon products  
Source: Travel Oregon

**Figure 4.12**  
**Amount Spent on Oregon**  
**Product Purchases**

- Ø Nearly half of Oregon visitors who bought local products spent \$100 or less on these purchases.
- Ø But nearly 20 percent said they spent \$201 or more during their last Oregon visit.
- Ø The mean amount spend on Oregon products among visitors was \$142 per trip.
- Ø Those with annual HH incomes of 100,000+ (mean = \$176) and visitors age 65+ (mean = \$166) spent the most.



Base: 575 Oregon visitors who purchased Oregon products  
 Source: Travel Oregon

**Mean = \$142**

### Figure 4.13 Satisfaction with Opportunities to Locate and Purchase Locally- Made Oregon Products

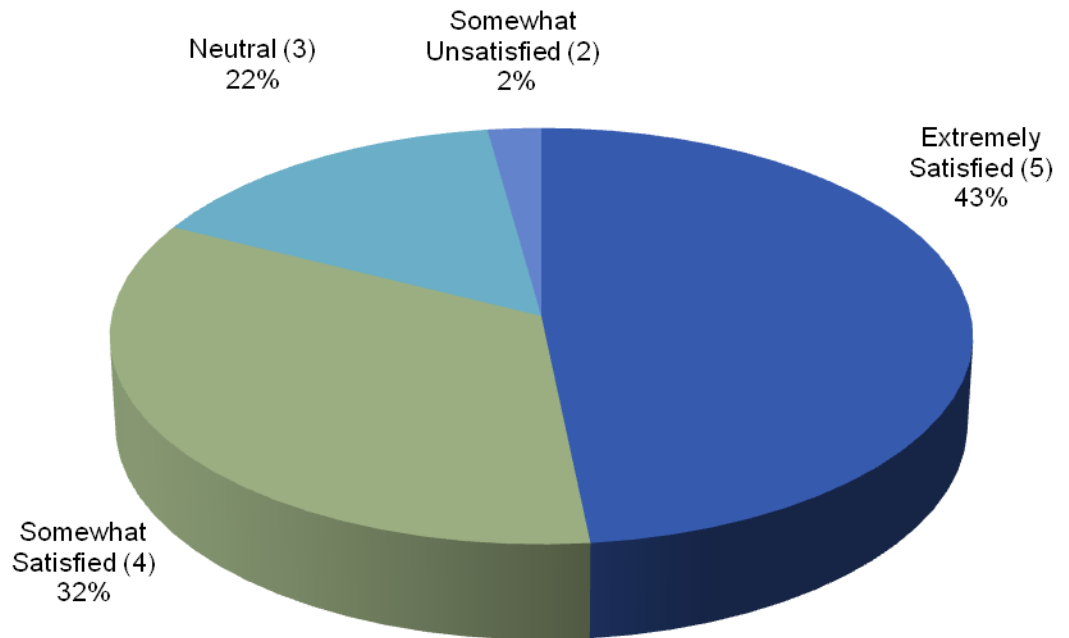
Ø Three-quarters of all Oregon visitors rated the opportunities to locate and buy Oregon products while on their recent visits to the state as a 4 or 5 on a 5-point satisfaction scale.

Ø Only 2% were somewhat unsatisfied, and just 3 people said they were not at all satisfied.

Ø All major demographic and attitudinal groups analyzed were similar in their high ratings on this question.

Ø When asked, most visitors (78%) had no suggestions to make to improve this situation. Among the suggestions for improvement that were made, most centered on convenience (7%), such as having more stores carrying these products and having more time to shop; economic factors (5%), such as better prices; and providing better information (5%), such as brochures, directories and signage.

### Satisfaction with Purchase Opportunities



Percentage of Oregon Visitors

Base: 770 Oregon Visitors  
Sources: Travel Oregon



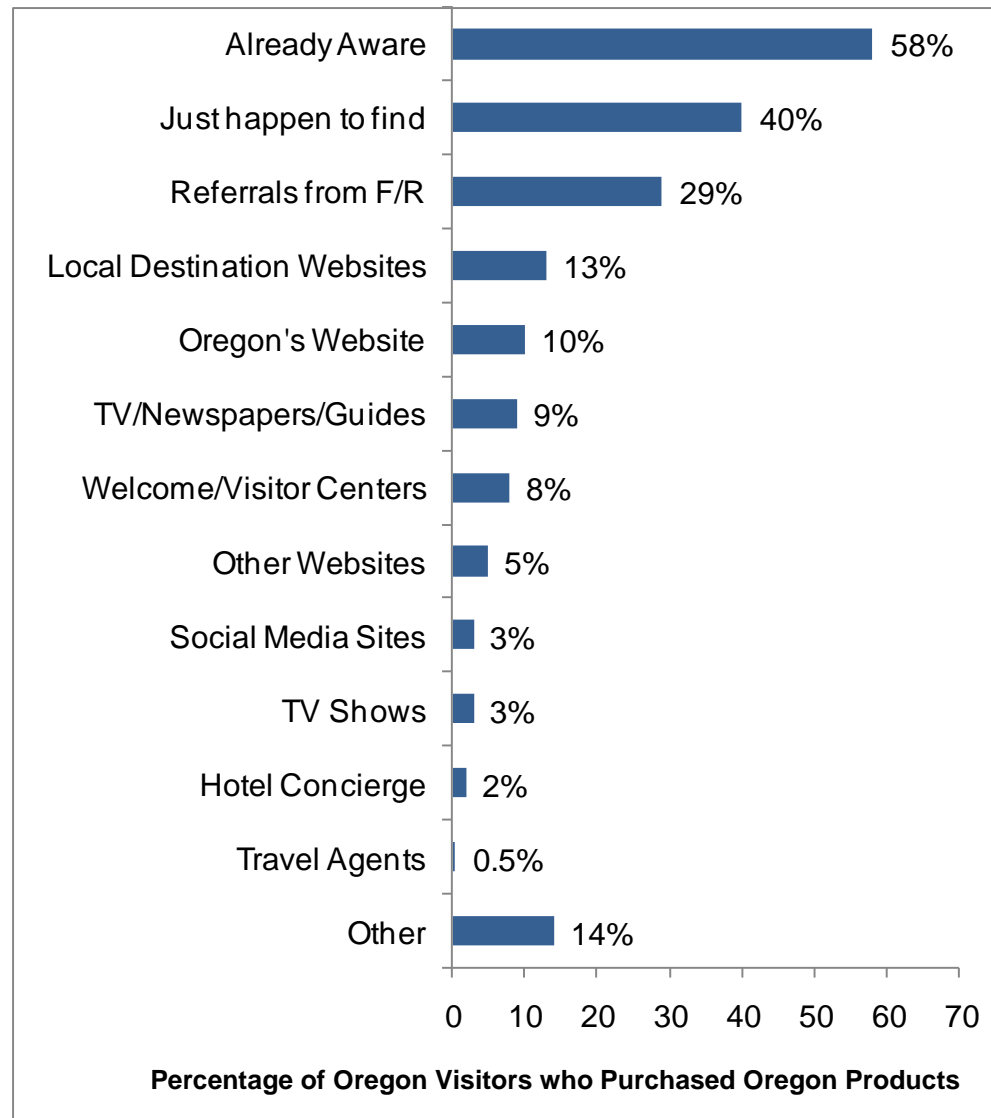
## Sources of Information about Oregon Products

### Figure 4.14 Sources of Information about Oregon Products

Ø The survey asked visitors how they found out about Oregon products. Many (58%) said they were already aware of them. Surprisingly perhaps, in-state visitors were not significantly more aware of such products than those visiting from out-of-state.

Ø Another 40% reported just happening to find these products to buy.

Ø Much smaller shares said they discovered Oregon products through various websites or other information sources, suggesting a ready opportunity to use these outlets to better promote Oregon products in the future.



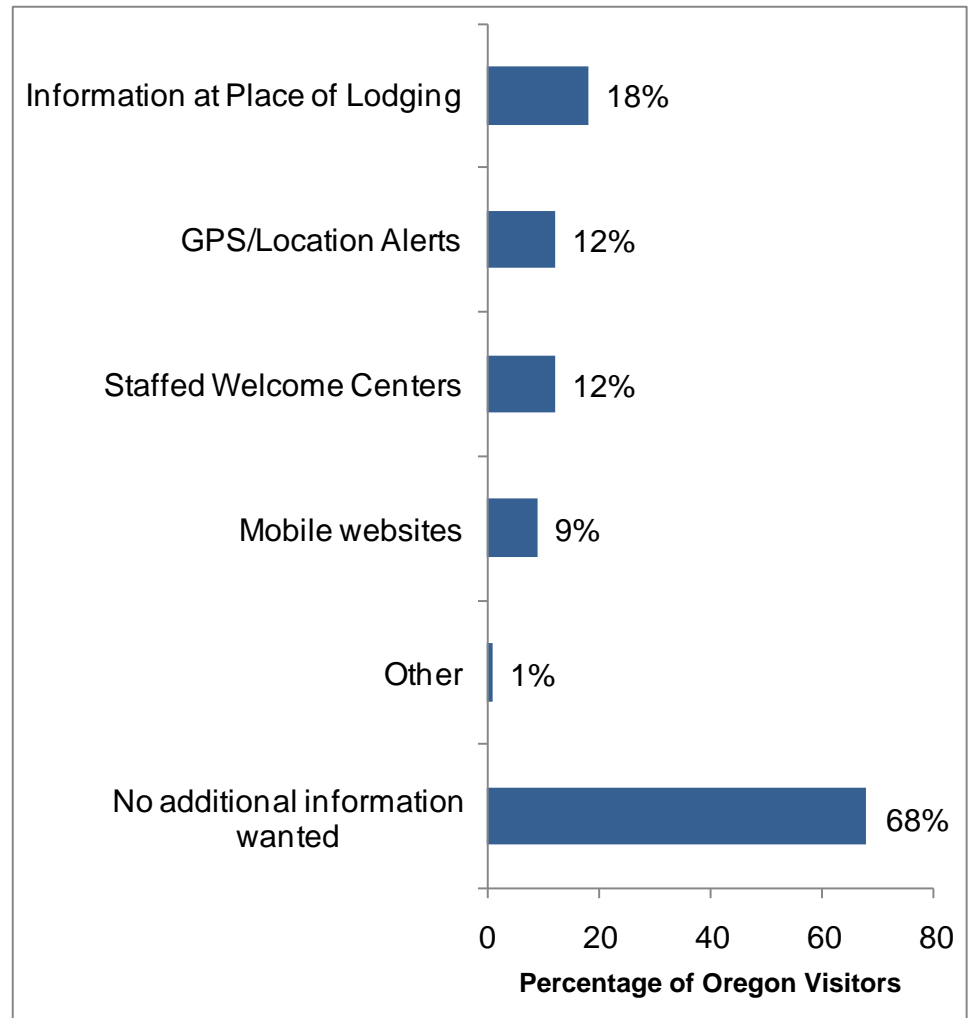
**Figure 4.15**  
**Other Sources of Information**  
**about Oregon Travel/Shopping/**  
**Products Wanted**

∅ The survey also asked about other sources visitors might want to get travel and product information for Oregon.

∅ Most visitors (68%) said they did not want any other information.

∅ About two-in-ten said they would like to have information at their place of lodging (18%), followed by GPS-enabled/location-based alerts of nearby products/attractions/deals (12%) or access to staffed welcome/visitor centers (12%).

**Other Sources of Information about Oregon**  
**Travel/Shopping/Products Wanted**



**Figure 4.16**  
**Likelihood to Purchase Oregon Products After Visiting There**

Ø One major question addressed by this research is the degree of influence that visiting Oregon has on the tendency to buy Oregon products after returning home.

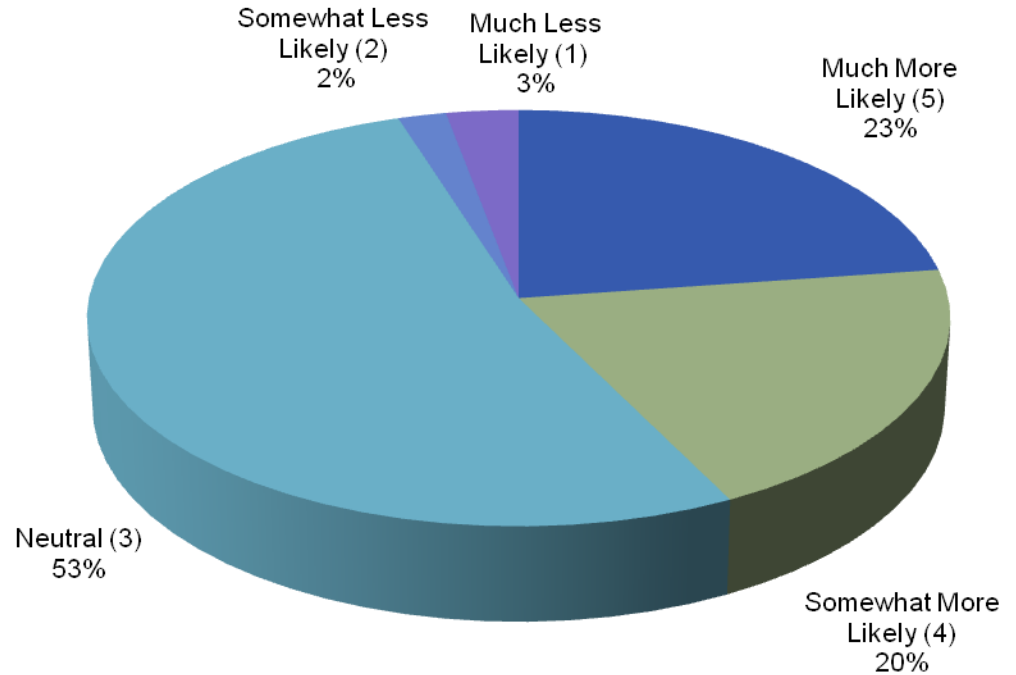
Ø While more than half rated their likelihood of buying Oregon products at home as a “3” on a 5-point scale, more than four-in ten said their visit had made them at least somewhat more likely to do so. In fact, one-quarter said it made them much more likely to buy these products at home.

Ø These attitudes were similar across most demographic groups.

Ø However, those with high spending levels for Oregon products while visiting the state (42% much more likely), those with the highest ratings on the uniqueness of Oregon products (35%) and in-state visitors (34%) had the greatest likelihood of buying these products also at home. (See pages 62-63)

Base: 770 Oregon Visitors  
 Sources: Travel Oregon

**Likelihood to Purchase Oregon Products After Visiting There**



**Percentage of Oregon Visitors**

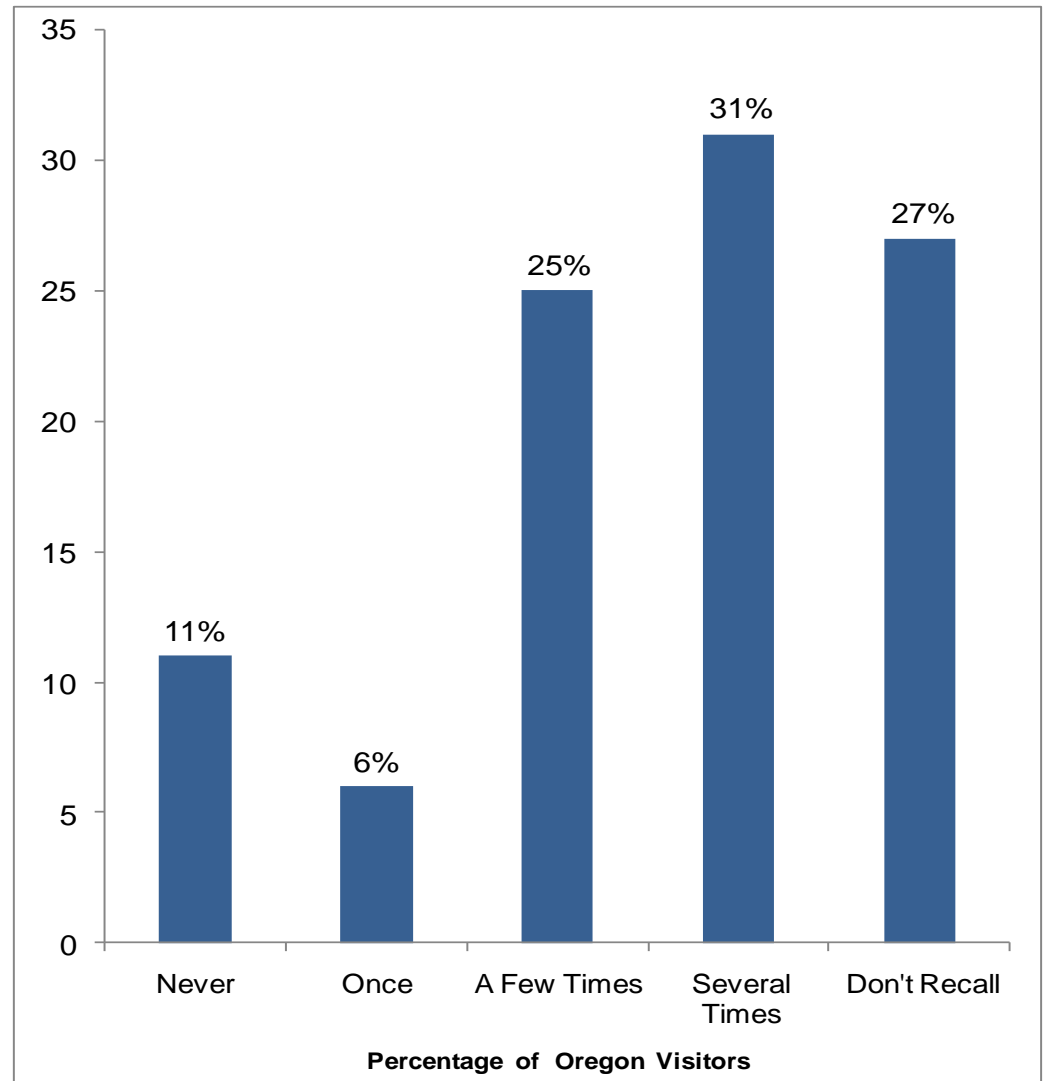
## Frequency of Purchasing Oregon Products at Home

### Figure 4.17 Frequency of Purchasing Oregon Products at Home After Visit

Ø Nearly one-third of Oregon visitors reported that they have purchased Oregon products several times since returning home.

Ø Only 12% said they never have, but an even larger 27% said they could not recall, suggesting that such purchases are not usual for this group.

Ø There were no significant differences among the demographic groups analyzed, but the table on page 78 clearly shows the correlation between buying Oregon products and related activities while visiting the state and continuing such behavior at home.



## Figure 4.18 Oregon Products Purchased at Home by Visitors

Ø Over 60% of Oregon visitors bought Oregon products after returning home.

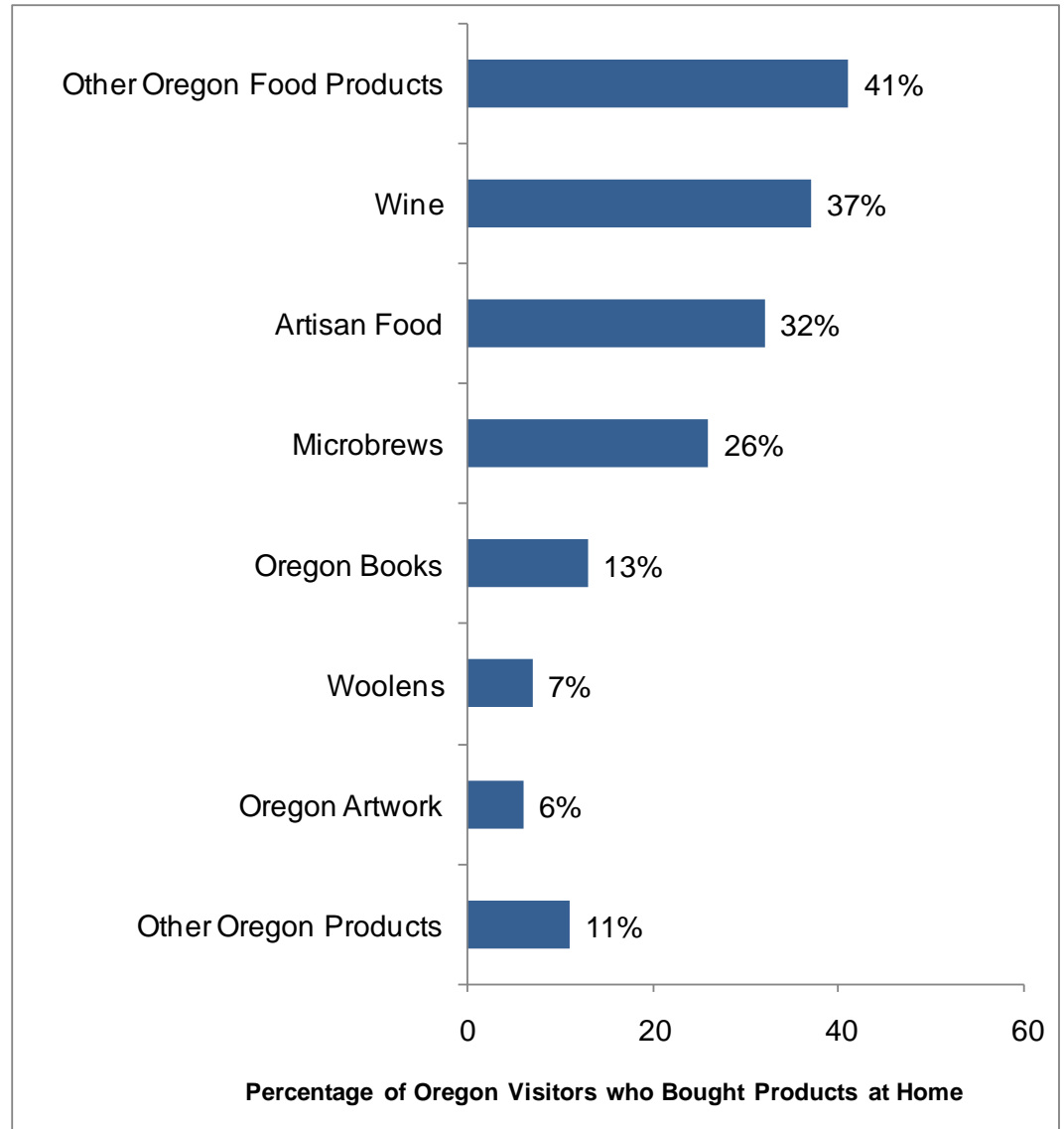
Ø Among product buyers, as with those who bought Oregon products while in the state, food/beverage items topped the list: wine (37%), traditional artisan food products (32%), microbrews (26%) and other food products (41%). These are all larger shares of Oregon products than were purchased while in the state.

Ø Again, smaller percentages reporting buying other local items such as Oregon books (13%), woolen items, such as those produced by Pendleton (7%), and artwork (6%).

Ø Older and upper income visitors were more likely than average to purchase some of these products. (See page 62)

Ø Also those engaged in culinary activities in the state, those rating Oregon most positively on its unique products and high spenders also showed elevated product purchases for many items. (See page 63)

## Oregon Products Purchased at Home by Visitors



**Figure 4.19**  
**Oregon Products Purchased at Home**  
**Index Values**

	Men	Women	18-34	35-64	65+	High Income*	Low Income*	College Grad	Less than College	Adult Only HH	HH with Kids
Other OR Food	109	94	94	104	95	93	101	98	102	99	104
Wine	107	96	91	100	166	123	82	119	81	99	193
Artisan Food	70	119	89	101	116	86	111	86	114	94	114
Microbrews	117	89	124	98	64	142	90	123	76	96	112
OR Books	96	103	45	127	85	66	129	83	119	91	124
Woolens	118	88	46	99	210	96	122	97	104	120	44
OR Artwork	48	134	44	121	119	74	121	103	92	92	123

\* High Income = Annual HH income > \$100,000+ ; Low Income = Annual HH Income < \$50,000

Note: See Appendix for description of how this Index is calculated. Items with an Index value of 125 or above are highlighted in red. For example, the 193 shown under the HH with Kids column means that visitors who reside in households with children for "wine" means that those living in such households are 93% more likely than Oregon visitors overall to buy Oregon wine at home.

Source: Travel Oregon

**Figure 4.20**  
**Oregon Products Purchased at Home**  
**Index Values**

	In-state	Out-of-State	OR Leisure Visitor	OR Bus. Visitor	4+ on Unique OR Prod.	OR Culinary Activities	Bought OR Products	High Spend	4+ OR Satisf.	Bought OR Products at Home	OR Visit Influence
Other OR Food	111	92	111	123	109	105	108	123	103	100	128
Wine	114	78	110	105	111	129	125	132	107	100	118
Artisan Food	102	99	100	101	110	116	116	159	195	100	116
Microbrews	110	88	110	116	105	123	135	94	95	100	97
OR Books	134	61	198	139	124	99	98	134	107	100	142
Woolens	84	131	92	292	93	92	129	218	95	100	84
OR Artwork	124	68	115	226	118	116	115	157	105	100	150

\*OR Culinary Activities = Toured wineries, toured breweries, drove a wine trail, attended a wine festival, sought out restaurants with local food, visited farmers markets, sampled artisan foods, attended a culinary festival, fine dining/culinary activities, took a cooking class.

\*\* High Spend = Spent \$201+ on Oregon products during most recent Oregon trip.

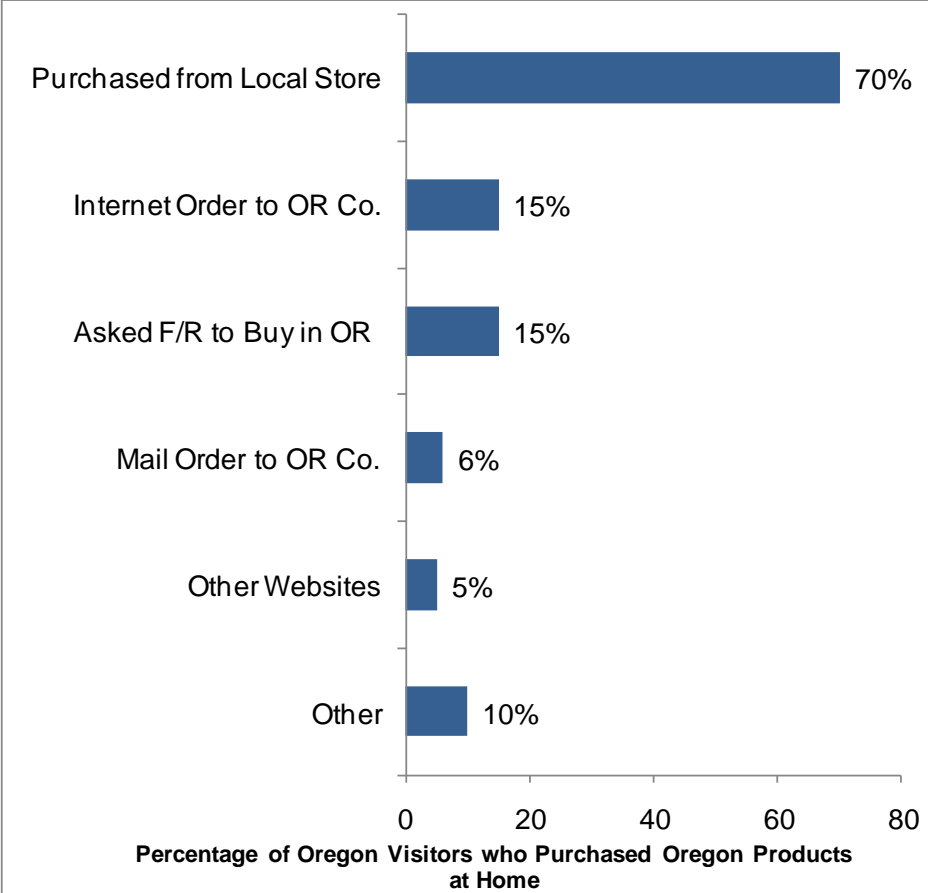
Note: See Appendix for description of how this Index is calculated. Items with an Index value of 125 or above are highlighted in red. For example, the 195 shown under the 4+ OR Satisfaction column for "artisan food" means that those who rate their recent Oregon visits as excellent or good were 95% more likely than Oregon visitors overall to purchase Oregon artisan food at home.

Source: Travel Oregon

### How Purchase Oregon Products Purchased at Home

## Figure 4.21 How Purchased Oregon Products at Home

- Ø Most Oregon visitors (70%) who have bought Oregon products after returning home said they have purchased these in their local stores.
- Ø Relatively small shares have used other methods with Internet orders to Oregon companies and requests of their family and friends to buy the products for them when they are in Oregon most common – 15% each.
- Ø Other methods were even less common, This suggests that greater attention might be paid to reaching potential Oregon product buyers in other ways.



Base: 465 Oregon Visitors who Purchased Oregon Products at Home  
Source: Travel Oregon

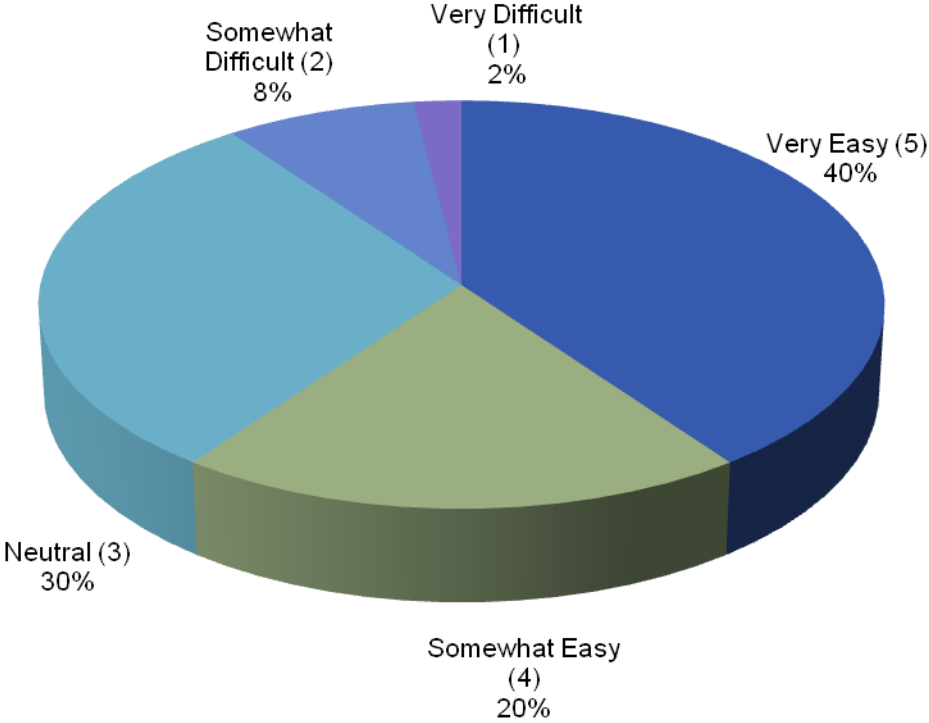


# Ease of Purchasing Oregon Products at Home

**Figure 4.22**  
**Ease of Purchasing Oregon Products at Home**

Ø Most Oregon visitors (60%) have found it to be easy to buy Oregon products at home. In fact, four-in-ten Oregon visitors felt that this was very easy to do.

Ø But, 10 percent said they have found it difficult to purchase Oregon products after returning home.



**Percentage of Oregon Visitors**

Base: 770 Oregon Visitors  
Sources: Travel Oregon

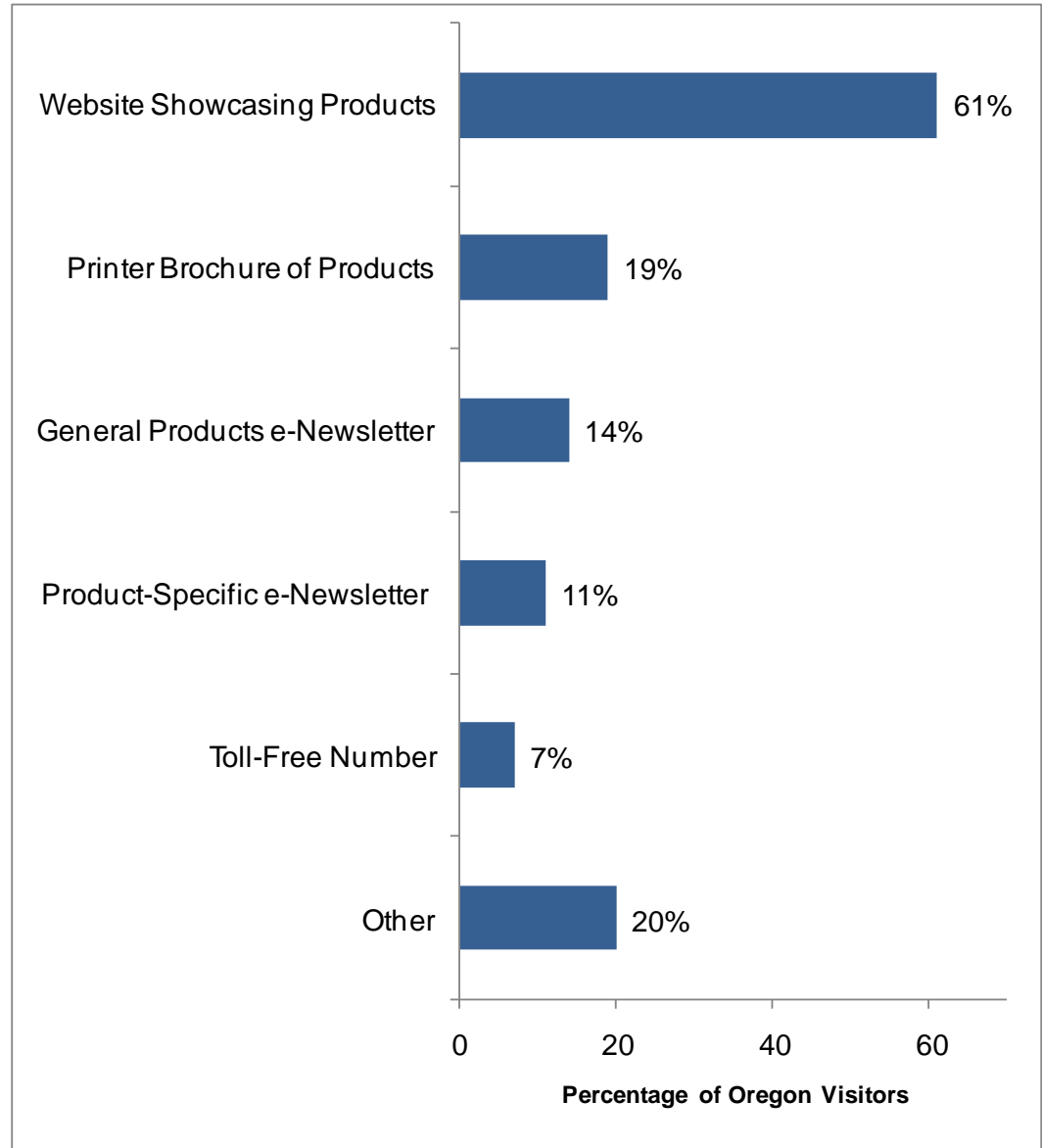
## Information to Improve Ease of Buying Oregon Products at Home

### Figure 4.23 Information that Would Make it Easier to buy Oregon Products at Home

Ø 61% of Oregon visitors said that having a website dedicated to showcasing Oregon products would enhance their ability to buy these products at home.

Ø Much smaller percentages agreed that printed brochures (19%) and product e-newsletters – either general (14%) or specific to certain products (11%) would help.

Ø Only 7% are interested in a toll-free number.

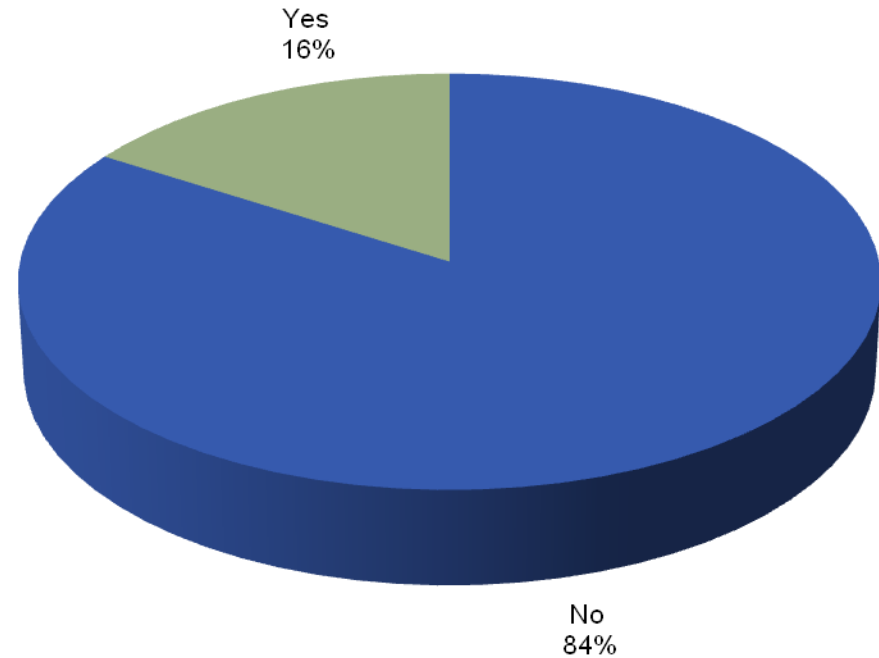


## Use of Social Media to Share “Oregon Travel Story”

### Figure 4.24 Used Social Media to Share Oregon Travel Story While Visiting

Ø Oregon visitors were asked if they had used social media while visiting the state to share their “Oregon Travel Story”. Most had not (84%)

Ø The youngest age group (18 – 34) (27%) were significantly more likely to have used this communications vehicle.

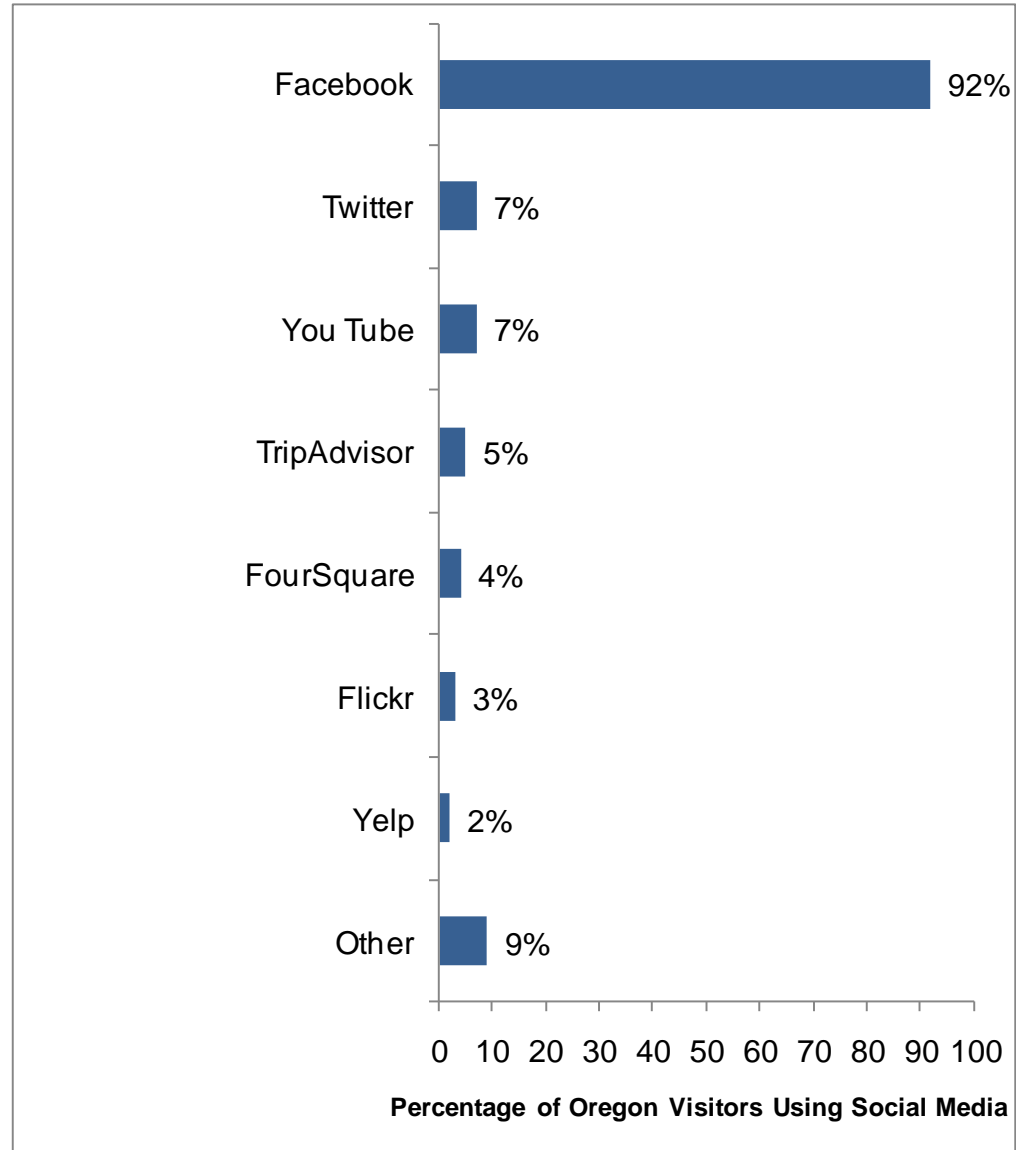


Percentage of Oregon Visitors

### Figure 4.25 Social Media Sites Used

Ø Among those who did use social media, Facebook was the overwhelming choice as to the site to use (92%), reflecting general social media usage trends.

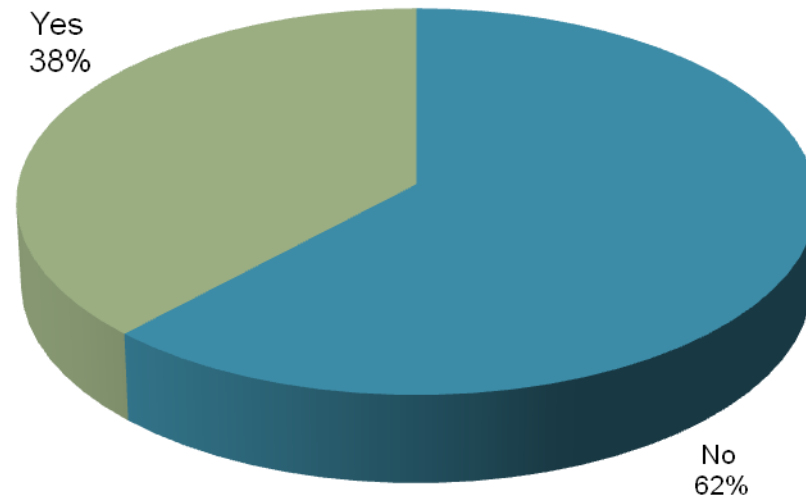
Ø Twitter and YouTube tied a distant second place at 7%, each.



**Figure 4.26**  
**Mentioned Oregon**  
**Products/Purchases while Using**  
**Social Media While Visiting**

Ø Among those who did use social media to tell their “Oregon Travel Story” while visiting the state, only about one-in-four (38%) said they mentioned Oregon products and their purchases while on such sites.

Mentioned Oregon Products/Purchases while Using Social Media While Visiting



Percentage of Oregon Visitors Using Social Media

## Methods for Sharing “Oregon Travel Story” at Home

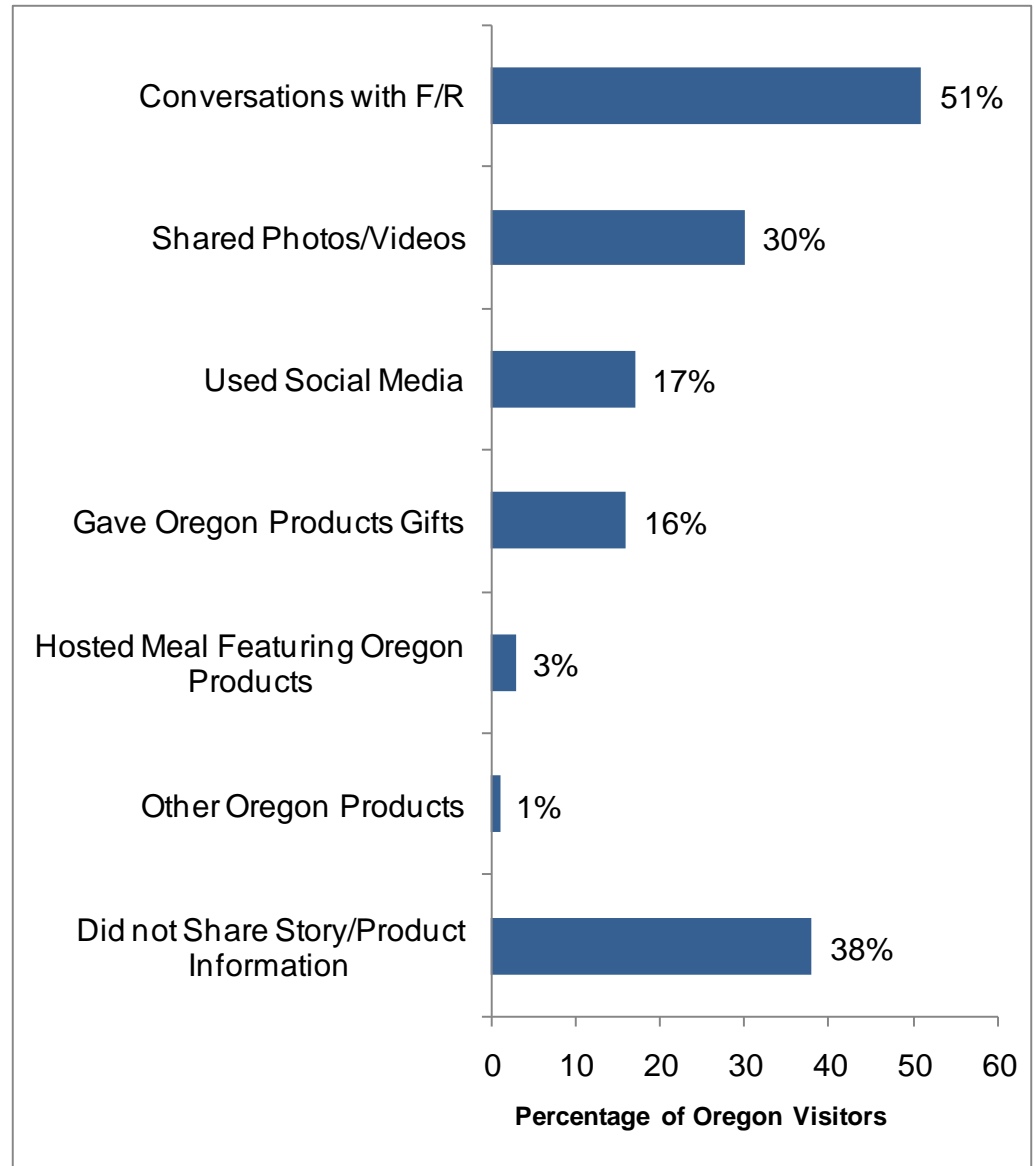
### Figure 4.27 How Shared Oregon Travel Story/Product Information after Returning Home

Ø Nearly 66% of Oregon visitors shared their “Oregon Travel Story” with others after returning home, usually by traditional methods.

Ø Social media was not the top communications vehicle, mentioned by only 17 percent of visitors.

Ø Instead, more tried and true channels such as conversations with friends and family (51%) and sharing photos and videos (30%) were most often used.

Ø Nearly two-in-ten told others about their experiences by sharing Oregon products with others, either as gifts (16%) or serving them to guests while telling them about their provenance (3%).

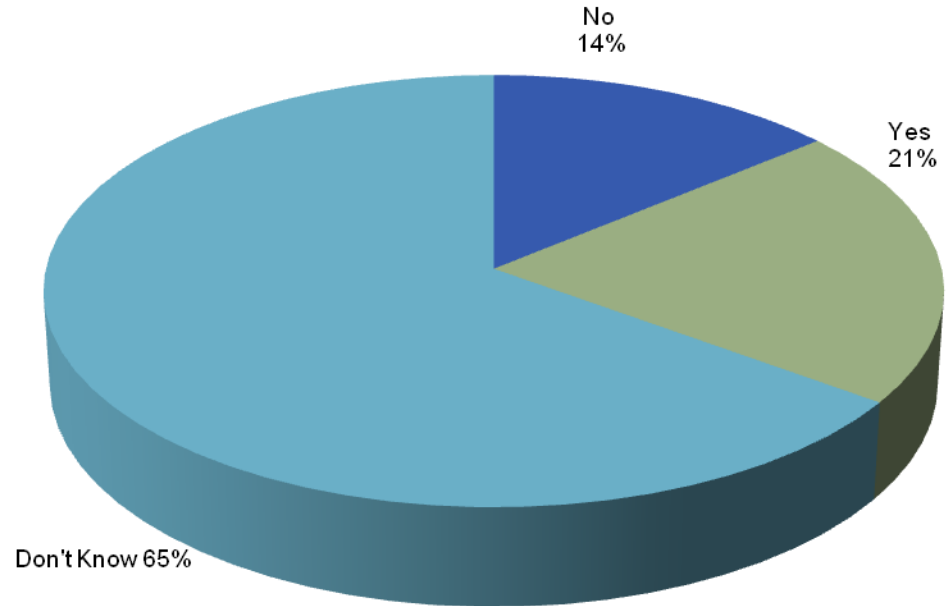


**Figure 4.28**  
**Have any Friends/Relatives**  
**Purchased Oregon Products**  
**because of Information provided**  
**by Oregon Visitors?**

Ø Visitors were asked if any of their family or friends had purchased Oregon products because of what they had told them about these. Most did not know (65%).

Ø Nearly one-quarter (21%), however, said that they had.

**Friends/Relatives Bought Oregon Products Because of Information from Oregon Visitors**



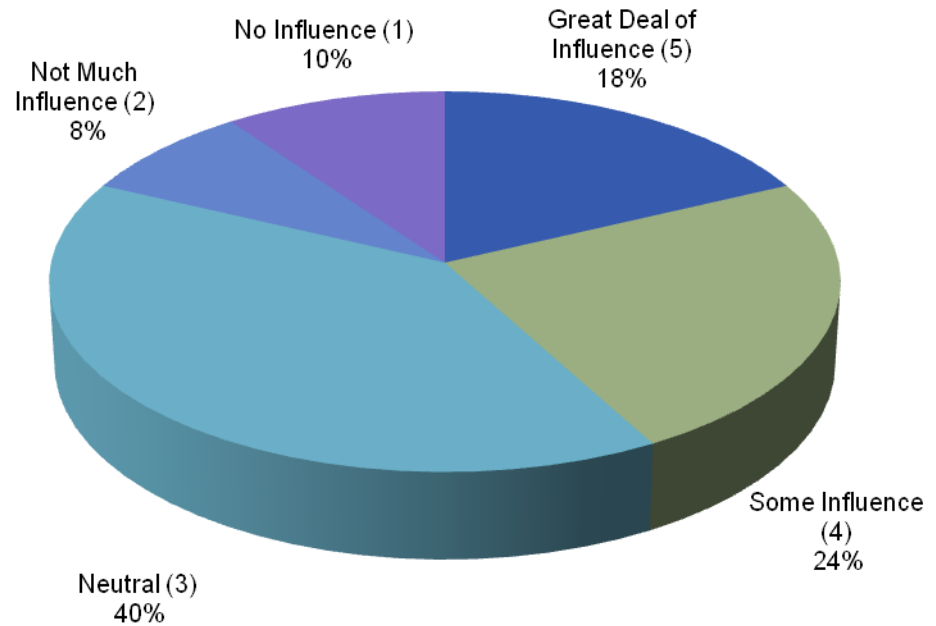
**Percentage of Oregon Visitors who Shared Oregon Travel Story**

**Figure 4.29**  
**Influence of Oregon Visitors**  
**introducing Friends/Relatives to**  
**Oregon Products on Their**  
**Decision to Visit**

Ø Respondents were also asked to assess the degree of influence their introduction to Oregon products might have had on their friends' and relatives' decisions to visit the state.

Ø Over 40 percent believed that their stories and information had at least some influence on these decisions. In fact, nearly one-in-five said it had a great deal of influence. This supports the common knowledge of the value of word of mouth.

**Influence of Oregon Visitors on Friends'/Families' Decision to Visit**



**Percentage of Oregon Visitors who Shared Oregon Travel Story**

Base: 505 Oregon Visitors who shared Oregon travel story.  
 Sources: Travel Oregon



**Figure 4.30**  
**Influence of Opportunity to**  
**Sample/Purchase Local Products**  
**on General Selection of**  
**Destinations**

Ø Oregon visitors were also ask about the degree of influence having opportunities available to sample/buy local products has on their destination choices.

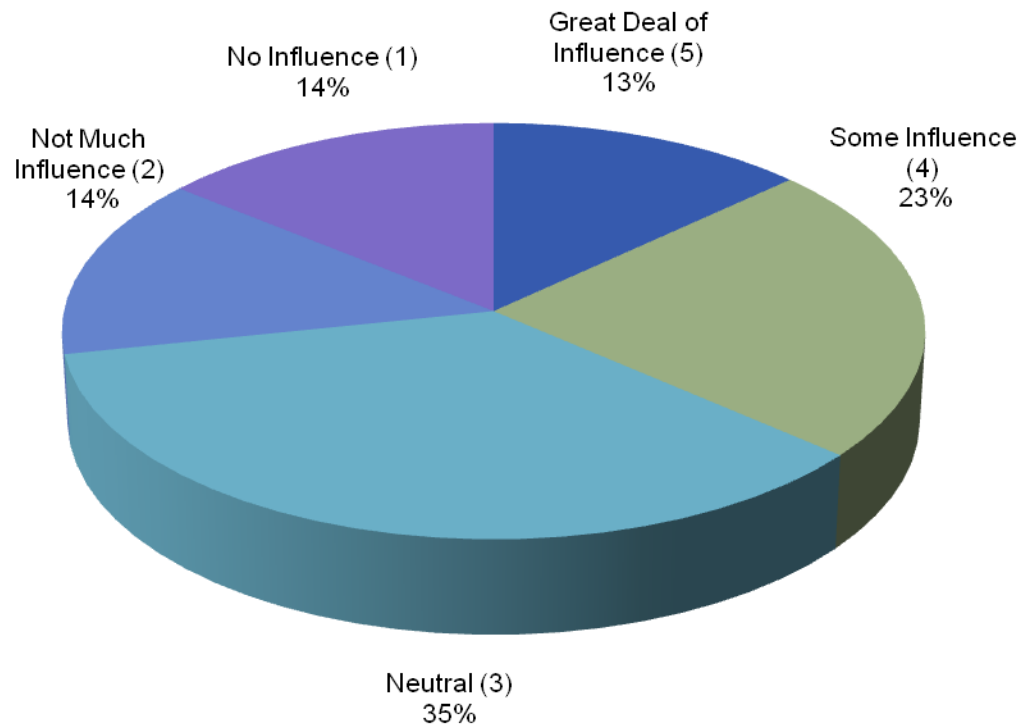
Ø Over one-third (38%) said these had some (23%) or a great deal (13%) of influence, in general.

Ø A smaller 28% reported that these opportunities have not much (14%) or no influence at all (14%).

Ø Those with high spending on Oregon products while visiting (63%), as well as those who shared their “Oregon Travel Story” while traveling using social media (50%) or when at home (45%) were most likely to be influenced in destination choice by the availability of local products.

Ø Visitors living in HH with children (41%), as well as women and college grads (40%, each) were so as well.

**Influence of Opportunity to Sample/Purchase Local Products on Destination Selection**



**Percentage of Oregon Visitors**

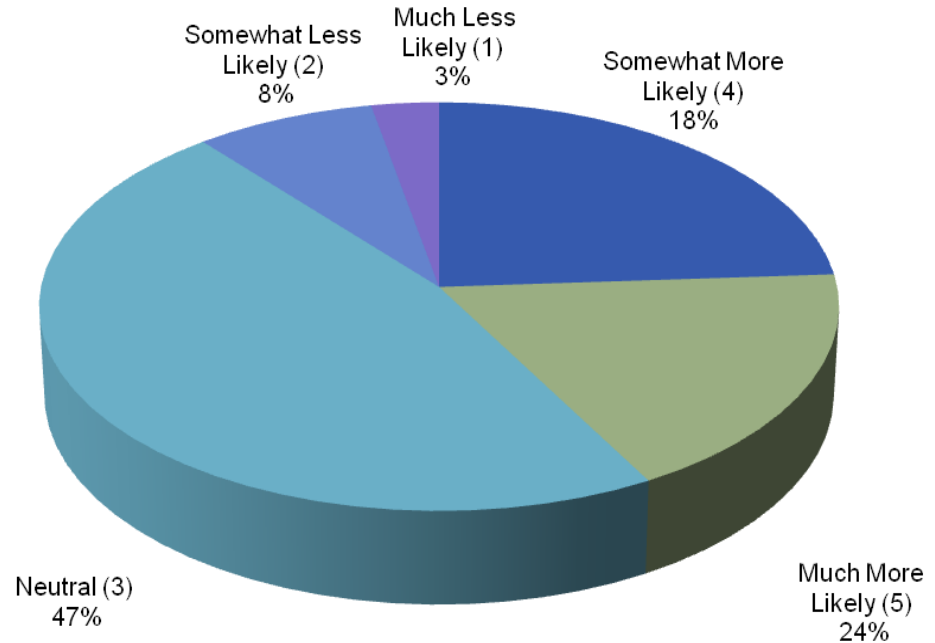
## Influence of Opportunity to Sample/Purchase Local Products on Likelihood to Return

### Figure 4.31 Likelihood of Returning to Oregon Because of Opportunity to Purchase Local Products

Ø A somewhat greater share of visitors said that having such opportunities to buy local products made them somewhat (18%) or much more likely (24%) to return to the state.

Ø There were few demographic difference with regard to this question. Various behavioral/attitudinal groups did differ significantly, however.

Ø The greatest influence of Oregon local product availability on likelihood to return was expressed by those most vested in the buying local products activity (i.e., those who rated Oregon most unique on this attribute, those who engaged in culinary activities or bought local products while visiting, those with high spend on these purchases, etc.) (See page 78 for more details)

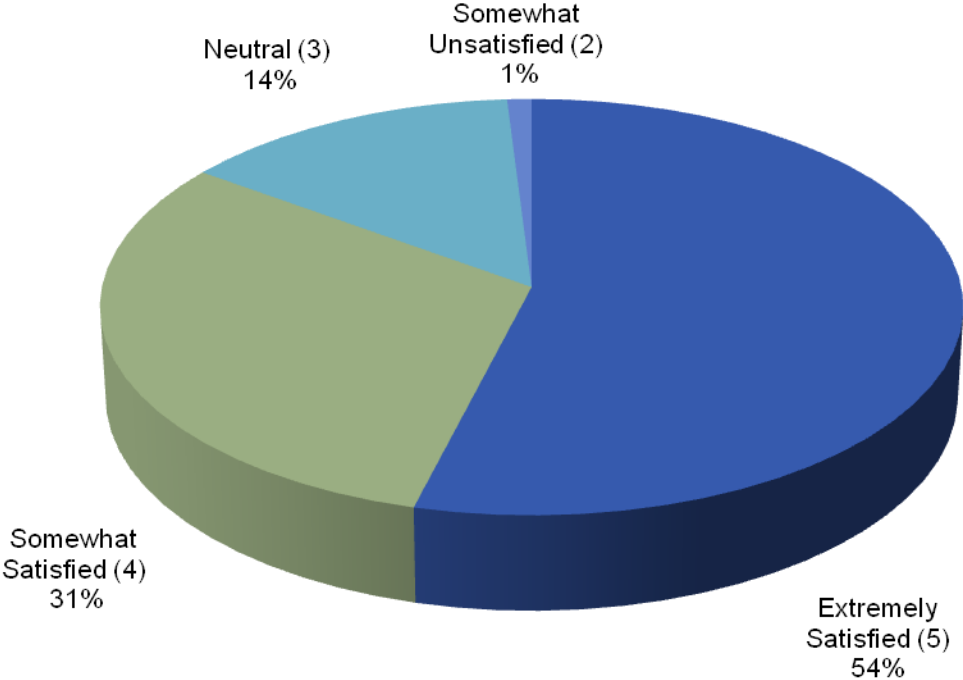


Percentage of Oregon Visitors

### Satisfaction with Oregon Visits

**Figure 4.32**  
**Satisfaction with Recent Oregon Visits**

- Ø Most Oregon visitors were either extremely or somewhat satisfied with their recent Oregon visits (85%).
- Ø Only 1% said they were somewhat unsatisfied and only one person out of 770 recent Oregon visitors surveyed said they were not at all satisfied.
- Ø The mean satisfaction rating was 4.4 on a 5-point satisfaction scale with 5 being the highest.
- Ø There were no major differences in satisfaction levels across the various demographic and travel behavior/attitudes groups analyzed – all were equally satisfied.



Percentage of Oregon Visitors

Mean = 4.4

Base: 770 Oregon Visitors  
Sources: Travel Oregon

## Figure 4.33 Influence of Oregon Visits on Other Decisions

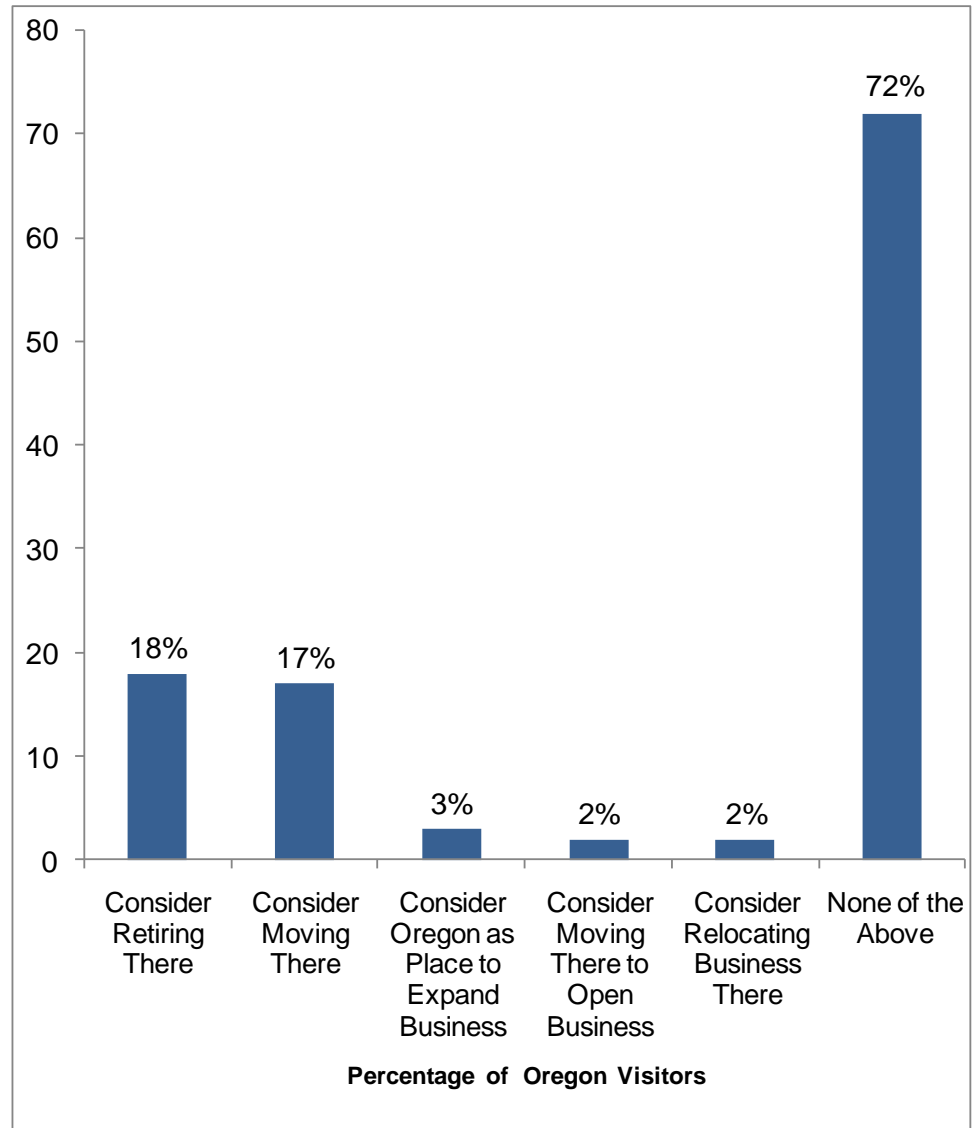
Ø While most visitors (72%) said that they did not consider any of the other decisions asked about in the survey, fairly sizeable minorities considered retiring in Oregon (18%) or moving there (17%) after visiting. This represents millions of people who are potential future Oregon residents.

Ø Those age 18-34 were more likely to consider Oregon as a place to move (25%) or expand their business (6%).

Ø And, perhaps not surprisingly, those who had visited Oregon on business trips were most likely to consider expanding (12%), opening (7%) or relocating (6%) a business there.

Ø Above average consideration of retiring in Oregon were expressed by those buying local products while visiting (25%), high spending on these (30%), and those who shared their “Oregon Travel Story” while visiting (26%) or at home (25%). Similar tendencies were found among these groups to consider moving to Oregon.

### Influence of Oregon Visits on Other Decisions



**Figure 4.34**  
**Oregon Visitor Behavior and Attitudes about Oregon Products and Trips**  
**Index Values**

<b>Travel in Past Year Anywhere</b>	<b>Men</b>	<b>Women</b>	<b>18-34</b>	<b>35-64</b>	<b>65+</b>	<b>High Income*</b>	<b>Low Income*</b>	<b>College Grad</b>	<b>Less than College</b>	<b>Adult Only HH</b>	<b>HH with Kids</b>
Rated OR 4+ for Offering Unique Products	90	106	93	100	111	102	101	108	93	102	94
Rated OR 4+ on Opportunity to Buy Unique Products	95	103	93	101	109	106	07	104	97	101	97
Rated Likelihood to Buy OR Products at Home 4+	90	106	97	101	102	101	105	98	101	96	111
Bought OR Products at Home Several Times	103	98	87	107	93	117	102	103	97	100	101
Rated Oregon Products as Influence to Return 4+	82	111	98	100	103	102	100	106	94	98	106
Rated OR 4+ on Trip Satisfaction	94	104	92	101	109	99	100	98	101	101	98

\* High Income = Annual HH income > \$100,000+ ; Low Income = Annual HH Income < \$50,000

Note: See Appendix for description of how this Index is calculated. Items with an Index value of 125 or above are highlighted in red.

Source: Travel Oregon

**Figure 4.35**  
**Oregon Visitor Behavior and Attitudes about Oregon Products and Trips**  
**Index Values**

Travel in Past Year Anywhere	In-state	Out-of-State	OR Leisure Visitor	OR Bus. Visitor	4+ on Unique OR Prod.	OR Culinary Activities	Bought OR Products	High Spend	4+ OR Satisf.	Bought OR Products at Home	OR Visit Influence
Rate OR 4+ for Offering Unique Products	109	91	107	113	164	123	124	135	114	114	124
Rated OR 4+ on Opportunity to Buy Unique Products	105	95	104	95	124	115	117	124	113	113	113
Rated Likelihood to Buy OR Products at Home 4+	127	77	103	117	139	127	126	151	112	130	147
Bought OR Products at Home Several Times	139	69	124	126	121	135	140	158	110	162	127
Rated OR Products as Influence to Return 4+	124	80	109	122	135	127	128	170	114	124	131
Rated OR 4+ on Trip Satisfaction	105	96	106	101	114	110	108	117	118	104	110

\*OR Culinary Activities = Toured wineries, toured breweries, drove a wine trail, attended a wine festival, sought out restaurants with local food, visited farmers markets, sampled artisan foods, attended a culinary festival, fine dining/culinary activities, took a cooking class.

\*\* High Spend = Spent \$201+ on Oregon products during most recent Oregon trip.

Note: See Appendix for description of how this Index is calculated. Items with an Index value of 125 or above are highlighted in red. For example, the 139 shown under the 4+ on Unique OR Products column for "Rate Likelihood to Buy OR Products at Home 4+" means that those visitors who rate Oregon as excellent or good for offering unique products were 39% more likely than Oregon visitors overall to rate their likelihood of buying Oregon products at home as excellent or good.

Source: Travel Oregon

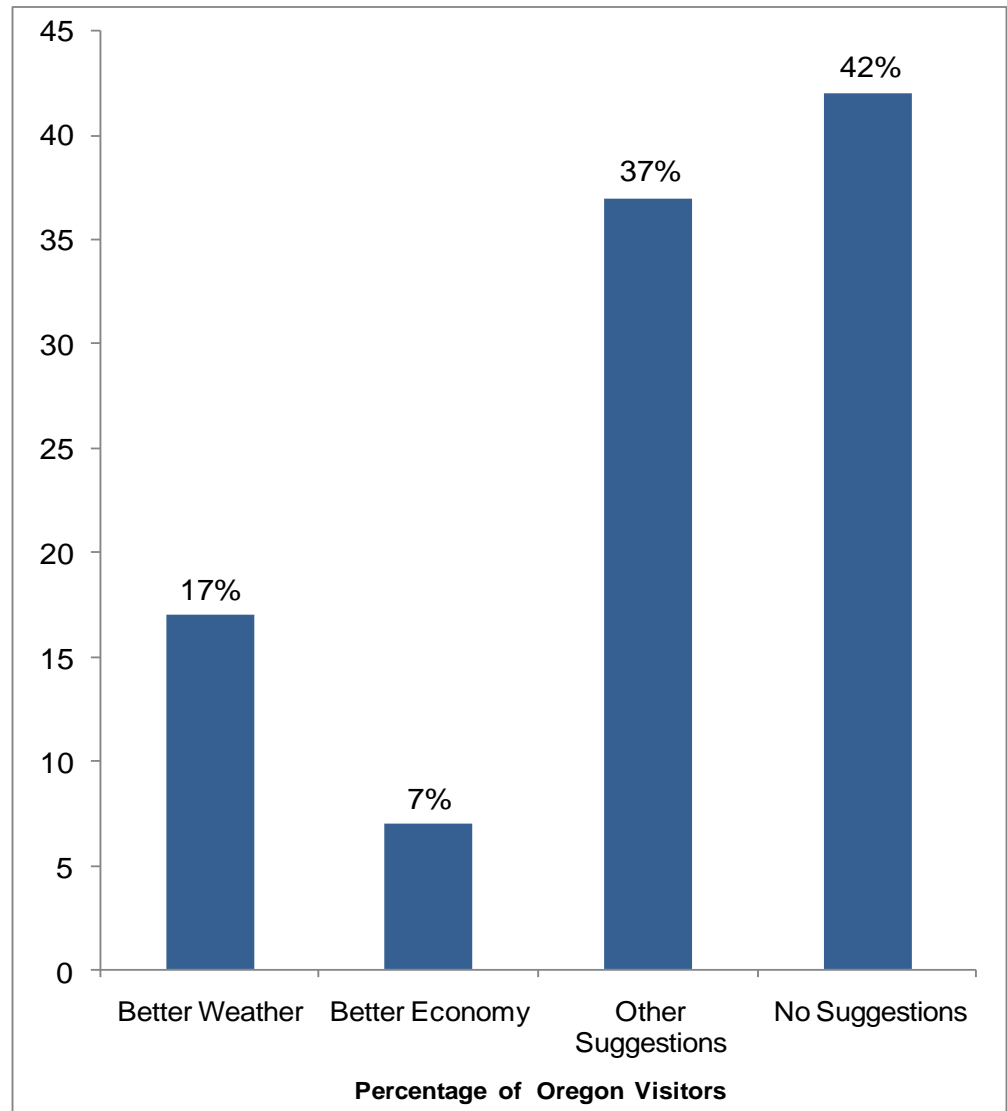
## Suggestions to Improve Oregon Visitor Satisfaction

### Figure 4.36 Suggestions to Improve Oregon Visitor Satisfaction

Ø When asked for suggestions as to what would have improved their satisfaction with their visits to Oregon, many (42%) had none to make.

Ø Better weather came up several times (17%), as did references to wanting lower prices and more money to travel.

Ø Better transportation and less traffic were also mentioned, as was a comment, that was really a positive assessment, that they wished they could have stayed longer (11%).







# Appendix



# Questionnaire

**Oregon Visitor study  
March – April 2011**

Thank you for participating in our survey on travel. Your opinions are important to us. Please continue the survey by clicking on the “next” button below.

A. Please indicate your gender:

Male

Female

B. Please indicate your age. **[RANGE 1-200]**

**[PROG: NUMERIC TEXT BOX. IF QB. < 18 OR > 99, THANK AND TERMINATE.]**

**PAST TRAVEL**

Most of the following questions refer to trips away from home. By trips, we mean trips of at least 50 miles, one way, from home **or** that included an overnight stay.

Q1. In the past 12 months (that is, since April of 2010), approximately how many leisure (pleasure, vacation, or personal) trips have you taken of at least 50 miles, one way, from home **or** that included an overnight stay)?

\_\_\_\_\_ Number of trips, if any. If none, enter “0”. **(0-365 RANGE)**

Q2. In the past 12 months (that is, since April 2010), approximately how many business/convention trips have you taken of at least 50 miles, one way, from home **or** that included an overnight stay)?

\_\_\_\_\_ Number of trips, if any. If none, enter “0”. **(0-365 RANGE)**

**IF NO LEISURE AND NO BUSINESS/CONVENTION TRIPS IN PAST 12 MONTHS, SKIP TP Q5.**

Q3. Using the list below, please select all the different modes of transportation that you have used on your leisure and/or business trips (of at least 50 miles or more, one way, from home **or** that included an overnight stay) in the past 12 months. Please select all that apply.

A personal vehicle

A company vehicle

A scheduled airline (e.g., Delta, American)

A chartered airline

A private jet

Rental vehicle

Train

Chartered bus

Scheduled bus service (e.g., Greyhound)

Other (Please specify: \_\_\_\_\_)

Q4. Using the list below, please select all the different types of lodging that you have used on your leisure and/or business trips (of at least 50 miles or more, one way, from home **or** that included an overnight stay) in the past 12 months. Please select all that apply.

Luxury chain or independent hotel/resort (e.g., Fairmont, St Regis, Ritz Carlton, Four Seasons)

Upper Upscale chain or independent hotel/resort (e.g., Embassy Suites, Hilton, Hyatt, Marriott, Sheraton)

Upscale chain or independent hotel/resort (e.g., Doubletree, Hilton Garden Inn, Wyndham, Crowne Plaza)

Upper Midscale chain or independent hotel/resort (e.g., Comfort Inn/Suites, Fairfield Inn, Holiday Inn/Express)

Midscale chain or independent hotel/resort (e.g., Best Western, Candlewood Suites, La Quinta, Quality Inn/Suites)

Economy chain or independent hotel/resort (e.g., Days Inn, Red Roof Inn, Motel 6, Microtel)

Bed and breakfast or inn

Homes of friends/relatives

RV or tent/campground

Condominium/Vacation home/Cabin I own

Condominium/Vacation home/Cabin I rent

Cruise ship

Vacation club/timeshare property I own

Vacation club/timeshare property I rent

A second home I own

Other (Please specify: \_\_\_\_\_)

No nights spent away from home

**[PROG: “NO NIGHTS SPENT AWAY FROM HOME” IS MUTUALLY EXCLUSIVE]**

Now, we’d like to ask you some questions specifically about Oregon.

Q5. What products in particular do you most associate with Oregon? (Open-ended)

Q6. On a scale of “1” meaning “poor” and “5” meaning “excellent”, how would you rate Oregon, as compared to other destinations, in terms of offering unique food, wine and other culinary products?

Q7. Have you ever visited Oregon on either a leisure/vacation or a business/convention trip?

Yes

No

**IF NO to Q7, SKIP TO DEMOGRAPHIC QUESTIONS.**

**IF YES, ASK:**

Q7a. Please indicate when you visited Oregon. Select all that apply.

Since April 2010

Between April 2009 and March 2010

Between April 2008 and March 2009

Between April 2007 and March 2008

Prior to April 2007

**IF SINCE APRIL 2010, ASK:  
OTHERWISE, SKIP TO Q8.**

Q7b. How many leisure/vacation trips did you take to Oregon in the past 12 months (that is since April 2010)?

Q7c. How many business/convention trips did you take to Oregon in the past 12 months (that is, since April 2010)?

We are particularly interested in your activities and shopping experiences while you were in Oregon and how these may have affected your purchasing habits of Oregon products after you returned home.

Q8. Which of the following activities did you do while on your recent trips to Oregon? Select all that apply. **(RANDOMIZE)**

Toured wineries/Tasted locally made wines

Toured local breweries/Tasted locally made beers

Drove a wine trail

Attended a wine festival

Sought out restaurants serving unique local cooking and locally-grown specialty food

Visited farmers markets

Sampled traditional artisan food products (e.g., cheeses) Attended a culinary festival (e.g., cheese, chili, chocolate, etc.)

Shopped for unique local crafts, artwork or other products

Engaged in outdoor recreational activities, such as hiking, biking, or camping

Visited beaches/waterfronts

Visited national and/or state parks

Went touring/sightseeing

Gambling

Visited friends and/or relatives

Shopping

Participated in fine dining/culinary activities

Participating in historic/heritage-focused activities

Participating in arts/cultural activities

Took a cooking class

None of the Above

Q9. Did you purchase any of the following during your recent trips to Oregon? Select all that apply.

- A. Wine
  - b. Traditional artisan food products (e.g., cheeses)
  - c. Microbrews
  - d. Other Oregon-produced food items
  - e. Woolens, such as produced by Pendleton
  - f. Artwork by Oregon artists (e.g., paintings, photographs)
  - g. Books about Oregon
  - h. Other Oregon-made products (Please specify: \_\_\_\_\_)
  - i. Inexpensive souvenirs
  - j. Clothes and other items you could have purchased anywhere
  - k. Other (Please specify: \_\_\_\_\_)
- No purchases made in Oregon

**[PROG: "NO PURCHASES IS MUTUALLY EXCLUSIVE] – Skip to Q 14**

If a., b., c and/or d in Q9, ask:

Q10. Which of the following did you do with these food, wine, or microbrew products you purchased while visiting Oregon? Select all that apply.

- Consumed them while on the trip
- Took them home for my personal use
- Took them home to give as gifts to my family and/or friends
- Shipped them home for my personal use
- Shipped them to family and/or friends as gifts

If e, f, g, and/or h in Q9, ask:

Q11. And which of the following did you do with the woolens, artwork, books and/or other locally made products you purchased while visiting Oregon? Select all that apply.

- Took them home for my personal use
- Took them home to give as gifts to my family and/or friends
- Shipped them home for my personal use
- Shipped them to family and/or friends as gifts ,

Q12. How did you find out about Oregon products you could purchase either before your trips or while on your visits there? Select all that apply. **(RANDOMIZE)**

- I was already aware of these Oregon products prior to my trip
- I just happened to find them while visiting
- Research I did in advance using newspapers, magazines, travel guides, etc.
- Television shows
- Travel Agents
- Oregon's travel website
- Local Oregon destination websites
- Other websites
- Social media sites, such as Facebook or Trip Advisor
- Referrals from friends, relatives, neighbors, and/or co-workers
- Welcome/visitor centers
- Hotel concierge
- Other (Please specify: \_\_\_\_\_)

Q13. Thinking of your last visit to Oregon when you made such purchases, approximately how much do you estimate you spent on these Oregon products during your visit? Select one answer.

- Less than \$50
- \$51 – 100
- \$101 – 150
- \$151 – 200
- \$201 - \$250
- \$251 - \$300
- \$301 - \$350
- \$351 - \$400
- \$401 - \$450
- \$451 - \$500
- Over \$500
- Don't Recall

Q14. Which of the following sources of additional travel/shopping/Oregon product information, if any, would you have liked to be available to add value to your visit to Oregon? Select all that apply. **(RANDOMIZE)**

- Mobile websites
- GPS-enabled/location-based alerts of nearby products/attractions/deals
- Access to staffed welcome centers/visitor information centers
- Information available at place of lodging
- Other (Please specify: \_\_\_\_\_)

No additional information sources wanted



Q15. On a scale of “1” meaning “not at all satisfied” and “5” meaning “extremely satisfied” , how satisfied overall were you with your recent Oregon visits?

Q15a. What would have improved your overall satisfaction? (Open ended)

Q16. And again on a scale of “1” meaning “not at all satisfied” and “5” meaning “extremely satisfied” , how satisfied overall were you with the opportunities to locate and purchase locally made products while on your recent Oregon visits?

Q16a. What would have improved your satisfaction in locating and purchasing Oregon made products? (Open ended)

Q17. On a scale of “1” meaning “much less likely” and “5” meaning “much more likely”, how likely are you now, as compared to before your visits, to purchase Oregon made products while you are at home?

Q18. How often have you purchased Oregon-made products after having visited there? Select one answer.

- Never
- Once
- A few times
- Several times
- I don't recall

IF ONCE OR MORE, ASK:

Q19. What Oregon products have you purchased since returning home? Select all that apply.

- a. Wine
- b. Traditional artisan food products (e.g., cheeses)
- c. Microbrews
- d. Other Oregon-produced food items
- e. Woolens, such as produced by Pendleton
- f. Artwork by Oregon artists (e.g., paintings, photographs)
- g. Books about Oregon
- h. Other Oregon-made products (Please specify: \_\_\_\_\_)

Q20. How have you purchased these Oregon-made products since you have gone home? Select all that apply.

- Purchased from a store in my local area
- Mail order from Oregon companies
- Internet orders from Oregon companies
- Other Internet websites
- Asked family and/or friends to purchase for me while they were in Oregon
- Other (Please specify: \_\_\_\_\_)

Q21. On a scale from “1” meaning “very difficult” to “5” meaning “very easy”, how difficult or easy has it been to purchase Oregon products you wanted to buy after you were home?

Q22. Which of the following would make it easier for you to buy Oregon-made products from home? (Select all that apply.)

A website that showcases various Oregon products

A printed brochure of Oregon products

An opportunity to subscribe to a general Oregon products e-newsletter

An opportunity to sign up for product specific e-newsletters

A toll-free number to call to order Oregon products

Other (Please specify: \_\_\_\_\_)

Q23. Did you use social media to share your Oregon travel story while visiting (during your recent trips to) Oregon?

Yes

No

IF NO, SKIP TO Q. 24

IF YES, ASK:

Q23a. Which of the following social media did you use? (Select all that apply.)

Facebook

Twitter

TripAdvisor

Yelp

Flickr

Foursquare

YouTube

Other (Please specify: \_\_\_\_\_)

Q23b. Did you mention any Oregon products or any of your purchases while using social media on your trip?

Yes

No

Q24. And, which of the following, if any, did you do after returning home to share your Oregon travel story or information about Oregon products? (Select all that apply.)

Used social media (i.e., Facebook, Trip Advisor)

Conversations with family and/or friends

Invited family and/or friends to a meal featuring Oregon food/wine/microbrew products

Gave Oregon products as gifts to family and/or friends and told them where they came from

Shared photos and videos of Oregon trip with family and/or friends

Other (Please Specify: \_\_\_\_\_)

Did not share Oregon travel story or Oregon product information with others

Q25. Have any of your friends and/or family purchased Oregon products because of what you told them about these?

Yes

No

Don't Know

Q26. On a scale from "1" meaning 'no influence' and "5" meaning "a great deal of influence", how much influence do you think that your introducing your family and friends to Oregon's local products will have on their decision to visit Oregon in the future?

Q27. In general, on a scale of "1" meaning "no influence" to "5" meaning "a great deal of influence", how much influence does the opportunity to sample and purchase local specialty foods/wines and local products usually have on your selection of destinations to visit on leisure trips?

Q28. And, on a scale from "1" meaning "much less likely to return" and "5" meaning "much more likely to return", how will the opportunity to purchase unique food, wine and other products in Oregon affect your likelihood to return?

Q29. Did your recent trips to Oregon influence you at least somewhat to do any of the following? (Select all that apply.)

Consider moving to Oregon

Consider retiring in Oregon

Consider relocating your business to Oregon

Consider Oregon as a place to expand your business

Consider moving to Oregon to open a business

None of the above

Demographics:

Income

Education

Marital status

Kids under 18 at home

Home state and zip code

Employment – Full time/self employed, part-time, not employed, retired, other



# Index



## Calculation of Index

To compare the propensities of various demographic and behavioral/attitudinal groups of Oregon visitors to do certain things as compared to Oregon visitors overall, an Index is used as a tool. An index value of higher than 100 indicates an above-average propensity for a specific group to exhibit a certain behavior or attitude, while an index lower than 100 indicates a below-average propensity. Total Oregon visitors serve as the average propensity with an index equal to 100 for each behavior and attitude explored.

For example, the formula used to calculate each index is:

$$\frac{\% \text{ of selected group with behavioral or attitudinal characteristic}}{\% \text{ of total Oregon visitors with behavioral or attitudinal characteristic}} \times 100 = \text{index}$$

$$\frac{32.2\% \text{ of those age 65+ bought Oregon wine at home}}{21.9\% \text{ of all Oregon visitors bought Oregon wine at home}} = 1.47$$

$$1.47 \times 100 = 147 \text{ index for those age 65+ on this characteristic}$$

In this case, the index is useful in demonstrating that Oregon visitors age 65 or older, with an index = 147, have a 47 percent higher propensity than Oregon visitors overall to buy Oregon wine after returning home.

# Regions





## Regional Definitions

Regional breakdowns used in this report are defined by the U.S. Bureau of Census:

### **Northeast:**

New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island and Vermont.

Mid-Atlantic: New Jersey, New York and Pennsylvania

### **South:**

South Atlantic: Delaware, District of Columbia, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia and West Virginia.

East South Central: Alabama, Kentucky, Mississippi and Tennessee.

West South Central: Arkansas, Louisiana, Oklahoma and Texas.

### **Midwest:**

East North Central: Illinois, Indiana, Michigan, Ohio and Wisconsin

West North Central: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota and South Dakota.

### **West:**

Mountain: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah and Wyoming.

Pacific: California, Oregon and Washington. (Alaska and Hawaii as destinations only)