



TRAVELHORIZONS™

PERSPECTIVES ON THE TRAVEL INTENTIONS OF AMERICANS

WAVE II – APRIL 2013

Excerpt from larger study



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travelhorizons™

***travelhorizons*™ WAVE II 2013
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SUMMARY (CONTINUED)

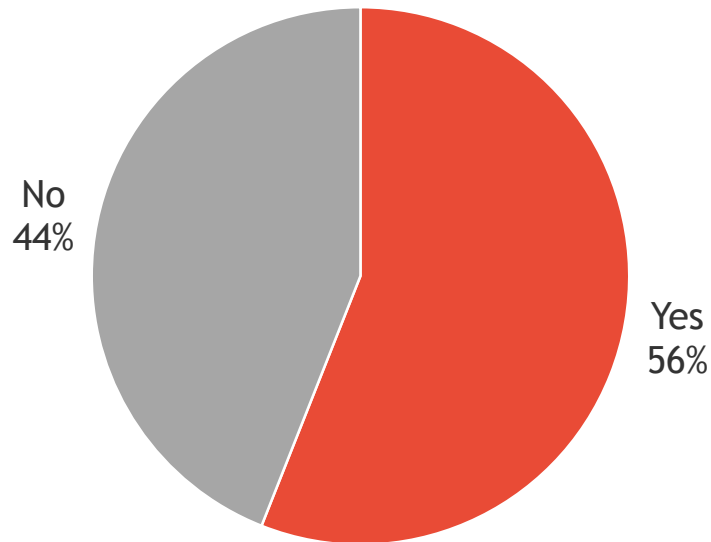
OREGON CULINARY ACTIVITIES

- The April *travelhorizons*TM survey continues to reveal that culinary-related activities are of significant interest for adults visiting Oregon and motivators for selecting Oregon as a leisure travel destination.
 - Six out of ten (56%) of U.S. adults who visited Oregon during the past two years prior to the April 2013 survey reported participating in a culinary experience while visiting Oregon;
 - The majority of Oregon visitors (77%) participating in a culinary experience made plans to experience the activity prior to departing from home for their Oregon leisure trip;
- Participation varies widely among the culinary activities.
 - Participation was highest for “visiting a farmers market” (42%), “attending a culinary event or festival (33%) and visiting a microbrewery (29%);
 - “Attending a cooking school or class” was again the least cited culinary activity (12%);
- Revealed in previous *travelhorizons*TM surveys, participation in a given culinary event and that event as a motivator for visiting Oregon for a leisure trip or vacation are inversely related.
 - While four out of ten (42%) Oregon leisure visitors reported participating in visiting a farmers market, one out of four (26%) said that it was a primary motivator for their Oregon visit;
 - Ranking at the bottom of the list among culinary activities experienced while visiting Oregon for a leisure trip or vacation – “taking a culinary excursion” (13%) and “attending a cooking school or class” (12%) – these two culinary activities ranked highest among culinary activities as motivators for visiting Oregon (56% each);
 - It was hypothesized that participation was low, but influence was high most likely due to the need to make reservations for the activities in advance of the Oregon visit as compared to “visiting a farmers market,” which requires no prior booking or reservation.

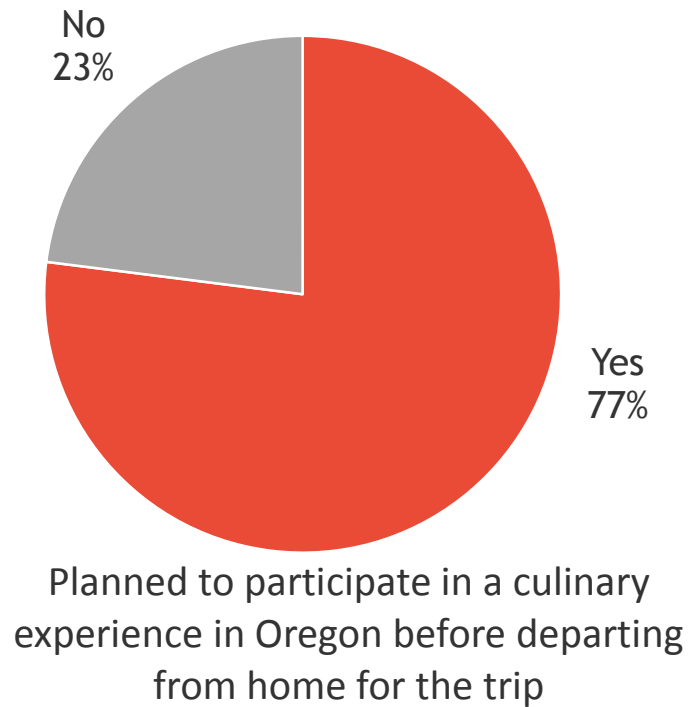


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OREGON AND CULINARY EXPERIENCES*



Participated in Culinary Experience in Oregon Visit in the Past Two Years



Planned to participate in a culinary experience in Oregon before departing from home for the trip

- According to the April 2013 *travelhorizons*TM survey, six out of ten (56%) adults who visited Oregon in the past two years said they participated in culinary experience while visiting Oregon – no substantial difference from data combined from the previous four surveys;
- Eight out of ten (77%) of those who participated in a culinary experience said they planned to participate in the culinary experience in Oregon before departing from home – 13 points higher than results from the combined surveys.

QOR5. During this/these Oregon trip(s) did you participate in a culinary experience? Base: Visited Oregon in the past two years.

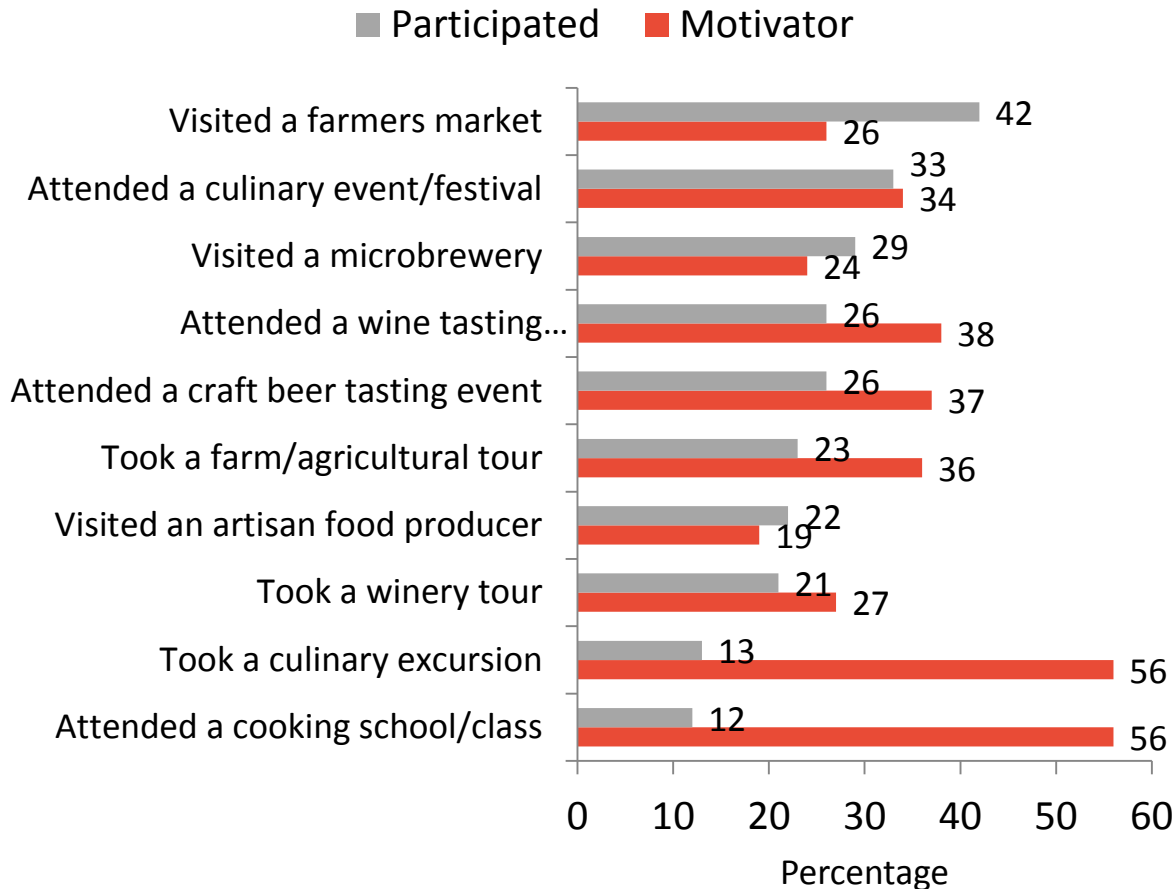
QOR6. Did you plan to participate in a culinary experience in Oregon before you departed home for the trip? Base: Visited Oregon/Participated in a culinary activity

*A culinary experience can include a winery tour, visiting a microbrewery, participating in Oregon wine or craft beer tastings, seeking out local cuisine, visiting an artisan food producer, attending a culinary event, visiting a farmers market, participating in an agricultural tourism activity and so forth.



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CULINARY ACTIVITIES



- Among the wide range of culinary activities, four out of ten (42%) Oregon visitors who participated in a culinary event said they visited a farmers market;
- One in three (33%) attended a culinary event or festival and another one out of three said they visited a microbrewery (29%);
- Nearly an inverse relationship exists between participation in the various culinary events and the extent to which the events serve as a motivator for visiting Oregon;
- For example, 12% of past Oregon visitors said they attended a cooking school or class – lowest among the activities included on the survey; yet, of those who attended a school or class, six out of ten (56%) said it was a primary motivation for visiting Oregon;
- On the other hand, farmers markets topped the list of activities in which Oregon visitors participated (42%), but ranked towards the bottom as a motivator for visiting Oregon (26%).



RESEARCH METHODOLOGY

The methodology for this study was as follows:

- The April 2013 *travelhorizons*TM survey was conducted from April 18 - 28, 2013;
- Responses were received from a nationally representative sample of 2,281 residents of the U.S. 18 years of age or older, including:
 - 1,815 active leisure travelers (those who reported taking at least one leisure trip during the previous year);
 - 748 active business travelers (those who reported taking at least one business trip during the previous year).



GLOSSARY OF TERMS

Adult: U.S. residents 18 years of age or older

Census Region: Four regions as defined by the U.S. Bureau of the Census

Northeast: Connecticut, Maine, Massachusetts, New Hampshire, New Jersey, New York, Pennsylvania, Rhode Island and Vermont

South: Alabama, Arkansas, Delaware, District of Columbia, Florida, Georgia, Kentucky, Louisiana, Maryland, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, Virginia and West Virginia

Midwest: Illinois, Indiana, Iowa, Kansas, Michigan, Minnesota, Missouri, Nebraska, Ohio, South Dakota and Wisconsin

West: Alaska, Arizona, California, Colorado, Hawaii, Idaho, Montana, Nevada, New Mexico, Oregon, Utah, Washington and Wyoming

Generational Groups:

Gen Y survey)	Born 1981 or later (members of this group under 18 years of age were not included in this survey)
Gen X	Born 1965 – 1980
Young Boomers	Born 1955 - 1964
Older Boomers	Born 1946 – 1954
Matures	Born 1945 or earlier

Active Leisure Traveler: Adults taking at least one leisure trip in the past 12 months of 50 miles or more one-way away from home (day trips) or that included an overnight stay.

Primary Mode of Transportation: Information gathered on eight modes of travel: airline, Amtrak train, own auto/truck, bus, camper/RV, large truck, ship/boat and other





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