



**TRAVEL  
OREGON**

Oregon  
Fall 2016/Spring 2017  
Advertising ROI  
Research

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# Background and Purpose

- ✓ Travel Oregon's FY16/17 Fall and Spring campaigns extended the "WE LIKE IT HERE. YOU MIGHT TOO." campaign, which was introduced the prior spring of 2016. It celebrated Oregon in the tone of an Oregonian, which is different than what you'll find anywhere else. The same way a vacation is different here than anywhere else...off the beaten path and miles from the expected.
- ✓ The Fall 2016 campaign (October '16 – January '17) featured two phases:
  - ✓ Phase 1: the objectives of this portion of the campaign were to build awareness & consideration of Oregon's broad range of winter offerings and position the state as a unique winter destination. It targeted Explorers within Boise, Portland, Seattle, San Francisco, Portland, and Vancouver BC. Phase 1 utilized both traditional and online media including:
    - ✓ Broadcast and digital video, which also appeared in cinema
    - ✓ Out-of-Home, including ads on wallscapes, kiosks, and transit media
    - ✓ Online display banner and social media ads
  - ✓ Phase 2: this phase of the campaign was designed to drive immediate action by serving up Oregon real-time winter locations/activities via a mobile device-dedicated "Oregon Weather Compass" website to the target who were within a 300 mile radius of Oregon. Phase 2 media included:
    - ✓ The Weather Company mobile app, which served digital video and native content promoting the weather compass
    - ✓ Programmatic placements of display ads

# Background and Purpose (Cont'd)

- ✓ The Spring 2017 campaign (March '17—May '17) also featured two phases:
  - ✓ Phase 1: the objective of this portion of the campaign was to build awareness & consideration of Oregon's broad range of travel product. It targeted Active Adventurers within Phoenix, Portland, Seattle, San Francisco, and Portland. Phase 1 utilized both traditional and online media including:
    - ✓ Broadcast and premium digital video
    - ✓ Programmatic video and display ads
  - ✓ Phase 2: the goal of this phase was to drive intrigue for and awareness of a series of Salmon 360 video experiences, which acted a tour guide for experiences across Oregon. Phase 2 media included premium digital video placements

# Background and Purpose (Cont'd)

- ✓ Longwoods was engaged to conduct a program of research designed to:
  - ✓ Measure the effectiveness of the advertising campaigns in bringing visitors to Oregon during the campaign period and shortly thereafter, and increasing intentions to visit in the future.
  - ✓ Estimate the return on advertising investment yielded by the campaign, in terms of incremental spending in Oregon by those visitors, and incremental taxes generated by that spending.
  - ✓ Through an analysis of Oregon's image, provide input into the development of positioning and messaging for future campaigns.

# Research Method

- ✓ A benchmark study was conducted after the conclusion of the advertising periods to measure awareness of specific ads, estimate the impact of advertising awareness on intentions to visit and image, and measure short-term conversion that occurred during and shortly after the campaign period.
  - ✓ A national self-completion survey of 1,400 respondents in the advertising markets, distributed as follows:

Oregon	700
San Francisco-Oakland-San Jose DMA	220
Washington	190
Arizona	180
Idaho	50
Greater Vancouver ,BC Canada	60
  - ✓ Respondents are members of a major online consumer research panel.
  - ✓ Adults 18 years of age and older were randomly selected from the panel, so as to ensure a representative sample.
  - ✓ Out-of-state sample was drawn to be proportionate to population by specific cities/regions, age, sex and income. In-state Oregon sample was drawn disproportionate to the population to allow for in depth analysis

# Research Method (Cont'd)

- ✓ The survey took an average of 25 minutes to complete.
- ✓ During the survey respondents were shown copies of the advertising materials, including video files of media-rich ads. This was done at the end of the survey so as not to bias earlier questions on attitudes towards Oregon and other behavioral measures.
- ✓ The fieldwork was conducted in late November/early December 2017.
- ✓ Data were weighted on key demographic variables (region, age, sex, household income) prior to analysis to ensure that results are representative of and projectable to the traveler population in specific markets.
- ✓ For a sample of this size, the confidence level is  $+ / - 2.5\%$ , 19 times out of 20.

# Research Method (Cont'd)

- ✓ The estimates of the campaign's impacts on visits and intentions to visit Oregon are conservative in that:
  - ✓ Trips taken/intended by people in the absence of advertising are backed out.
  - ✓ Conservative control procedures help ensure that only advertising-influenced trips are included.
- ✓ Unless otherwise noted, results shown are representative of all respondents surveyed (n=1,402 travelers).



# Research Method (Cont'd)

- ✓ A conversion study was conducted to return to those respondents from the benchmark study who indicated they had not yet traveled to Oregon but still intended to and determine if they actually took a trip to Oregon.
  - ✓ The fieldwork was conducted in late May/early June 2018.
  - ✓ Respondents from the benchmark study who had indicated they either “definitely will” or “probably will” when asked “do you intend to visit Oregon in the next 12 months on a day or overnight leisure trip” were re-contacted.
  - ✓ As a conservative measure, only those who indicated they intended to take a trip and who had not taken a trip to Oregon between October 2016 and the benchmark study were included in the conversion calculations.

# Research Method (Cont'd)

- ✓ **ROI** calculation:
  - ✓ The **Longwoods R.O.EYE™** method quantifies the relationship between awareness of campaign elements and trip taking.
  - ✓ A baseline measure is generated to estimate the level of visitation that would have occurred in the absence of advertising activity.
  - ✓ Using the principles and techniques of quasi-experimental design, we control for the effects of internal and external factors that could otherwise influence the result, such as economic conditions, catastrophic weather events, prior visitation, etc.



# Executive Summary

# Executive Summary

- Visit Oregon's fall/winter and spring campaigns in core markets generated good awareness:
  - Reaching almost 5 in 10 of the intended target audience of travelers.
  - Achieving a substantial frequency of recalled exposure with a mean of 7.6 exposures.
- The campaigns were successful at changing people's perceptions and overall image of Oregon as a travel destination, including shifts that were in areas of particular importance in driving destination selection.
- The advertising also had a positive effect on actual travel to Oregon in the period (15 months) we measured from campaign launch:
  - Yielding over 1.2 million incremental trips over and above the travel that would have occurred in the absence of advertising.
- This incremental travel translates into additional visitor expenditures of \$331.4 million while those travelers were in Oregon.

# Executive Summary

- Overall, the campaign generated 1.2 million incremental trips that would not otherwise have taken place, which brought \$331 million in incremental visitor spending and \$16.7 million in state and local taxes.
- And, every \$1 invested in ad campaign generated almost \$157 in visitor spending and about \$8 in tax revenue for the benefit of Oregon residents.

# Travel Motivators

- In the survey, respondents were asked to evaluate several destinations overall and on a series of detailed image attributes.
- Through statistical analysis, we have derived the relative importance of each attribute in determining people's overall interest in the destinations.
- Then, in order to better communicate the results, the data have been grouped into 13 broader categories, or travel motivators, and ranked from more important to less important.

# Travel Motivators

- The more important a travel motivator is, the more important it should be for a destination to communicate that message about itself, taking into consideration its ability to deliver on the promise with its product.
- Within each travel motivator category, the image attributes that make up that category are also presented in their order of importance.
- When evaluating Oregon's image and product delivery, and those of the competitive set, it is critical to keep the relative importance of each attribute in mind.

# Travel Motivators

- For travelers, the top motivators for getting on the destination wish list are **exciting**, followed by **adult vacation** and **family atmosphere**:
  - the notion of **excitement** comes from being seen as fun, with a sense of adventure and a must-see destination
  - **adult vacation**, the perceived suitability for adults and couples, is important because they are paying for the trip
  - **family atmosphere** refers to a destination's perceived appeal for kids and families



# Travel Motivators

- Several factors are of moderate importance individually; but they include some of the key rational features that bring to life the emotional excitement that attracts people to a destination:
  - the availability of **luxurious** accommodations and dining
  - **popularity** as a tourist destination in general
  - **uniqueness**, including the local people, culture and traditions
  - good **sightseeing**, particularly the overall variety of things to see and do, and beautiful scenery
  - a **worry-free** environment, because being perceived as friendly and welcoming, as well as safe is important
  - opportunities for **sports and recreation**

# Travel Motivators

- Relatively low on the priority list are:
  - **Farming Experience**, including availability of venues using green and sustainable practices, organically-grown food and farm vacations
  - **Climate**, excellent climate overall
  - The opportunities for **entertainment**, including festivals, nightlife, shopping, music and theater
  - **Affordability** refers to the costs associated with getting to and staying at a destination:
    - although relatively unimportant at the wish list stage, cost usually rises in importance the closer one gets to closing the sale

# Oregon's Image

- Oregon's Competitive Set includes Washington State, Idaho, Colorado, Montana, California and British Columbia.
- Oregon's image strengths versus these competitors as a group are wide ranging, but include:
  - The great parts of being on the coast: exceptional coastal scenery, great for whale watching, great beaches and great for storm watching.
  - Microbreweries and beer
  - Green and sustainable practices, organically grown foods
  - Bicycling
- The only significant weakness relative to the competitive set is excellent snow skiing/snowboarding, which is not a key destination driver

# Oregon's Image

- A more detailed analysis of Oregon's image vs. the image of the individual competitive states evaluated in this study reveals the following:
- **Idaho**– Oregon outperforms Idaho in nearly all image attributes, including the Hot Button attributes. Oregon scores high for green/sustainable practices and organically grown food.
- Oregon also has the advantage in some urban aspects, such as excellent theater and the arts, wineries and breweries, and great shopping.
- Idaho is seen as less crowded, with more affordable accommodations and better skiing/snowboarding.

# Oregon's Image

- **Washington**– Oregon's image strengths relative to Washington focus on Oregon's outdoor recreation opportunities, including rafting/kayaking, beaches, bicycling, and camping. Oregon is also seen as being more affordable, both in the cost of meals and the vacation packages.
- Oregon also leads Washington in green/sustainable practices, organic food products, and picturesque farming country.
- Washington has the advantage over Oregon in several urban amenities, including sophisticated restaurants, museums and art galleries, and nightlife.

# Oregon's Image

- **British Columbia**– Oregon's image strengths relative to British Columbia are all about the outdoors, including beaches, farm vacations, wineries, rafting/kayaking, and golf. Oregon is also seen as a more affordable destination, noted for being affordable to get to, and having affordable meals and accommodations.
- Oregon is also noted for both its wineries and breweries, as well as its interesting fairs, festivals, and events.
- British Columbia's image strengths relative to Oregon include unique offerings such as Native American culture, whale watching, interesting cities, and elegant, sophisticated restaurants. British Columbia is also perceived as having better skiing and interesting customs and traditions.

# Oregon's Image

- **Colorado** – Oregon rates higher on the critical characteristics of being a place children would enjoy, having truly beautiful scenery, lots to do, and being a place everyone should visit at least once. Oregon is recognized for all things food and beverage: including wineries, microbreweries, locally-grown specialty foods, organic food, and unique local cooking. Oregon also dominates in cultural activities such as museums, galleries, and events.
  - Respondents also rated Oregon highly as being a place that they would seek out more information about.
- Colorado's strengths include skiing and snowboarding, hiking and backpacking, mountain biking, and its first-class resorts.

# Oregon's Image

- **Montana** – Relative to Montana, Oregon excels in the all-important areas of fun and excitement, as well as being a good place for couples and as a family destination. Oregon dominates in cultural attributes, such as theater, live music, and events. Oregon is also noted for its food scene, including organic foods, elegant restaurants, and local specialty foods. Oregon is again noted for its emphasis on green and sustainable practices.
- Montana's strengths in comparison include affordability, being less crowded, Native American culture, and skiing/snowboarding.



# Oregon's Image

- **California** – Compared with California, Oregon is perceived as being a place where people can unwind and relax: it is less crowded and more safe, with friendly, welcoming people. Oregon also rates higher on many outdoor activities, including fishing, bicycling on roads, farm vacations, and storm watching.
  - Oregon also outperforms California on its beautiful scenery, gardens, and parks and picturesque countryside.
- California is perceived as being a more interesting and exciting place, including the key hot buttons of having lots to see and do and being a fun place for a vacation
- California also has advantages over Oregon in primarily urban amenities, likely attributable to Los Angeles and San Francisco: art galleries, nightlife, first class hotels and resorts, shopping, and restaurants, among others.

# Product Delivery

- The image ratings just discussed examined perceptions of Oregon and the competition among the broad population of potential travelers in Oregon's target markets. Within that broad population are some people who have visited Oregon in the recent past, i.e. who have experienced Oregon's product, and some who haven't.
- The analysis that follows examines recent visitors' (within the last two years) image of Oregon based on recent experience--"product delivery"-- compared to the image ratings of those who have never visited, i.e., whose perceptions are based on "pure image".
- This is essentially the difference between the expectations of those who have not been to Oregon vs. the experiences of those who have. When the experience falls short of expectations, there may be a problem with the product. When experience exceeds expectations, there is a great opportunity to educate those who don't know how wonderful Oregon is.

# Product Delivery

- In this survey people who have visited Oregon in the past two years gave Oregon substantially higher ratings for every one of the many attributes on which they evaluated the state than people who had never visited.
- In other words, the first time visitor is very pleasantly surprised by what they experience in Oregon.
- The difference is, in many cases, so large that it is clear that Oregon's product delivers on its perceived image, consistently exceeding visitor expectations. The conclusion one could draw is that with such a good product, Oregon has more of an awareness problem than a product problem.

# Product Delivery

- The greatest differences in “perception vs. reality” are:
  - Oregon’s coastal scenery and beach vacation offerings, including whale watching.
  - Oregon’s local food scene: visitors are impressed with the microbreweries and beer, the wineries, and the bounty of local and organic foods.
  - Easy to get there: visitors report that Oregon is not too far away for a vacation, and it is more affordable to travel to Oregon than expected.



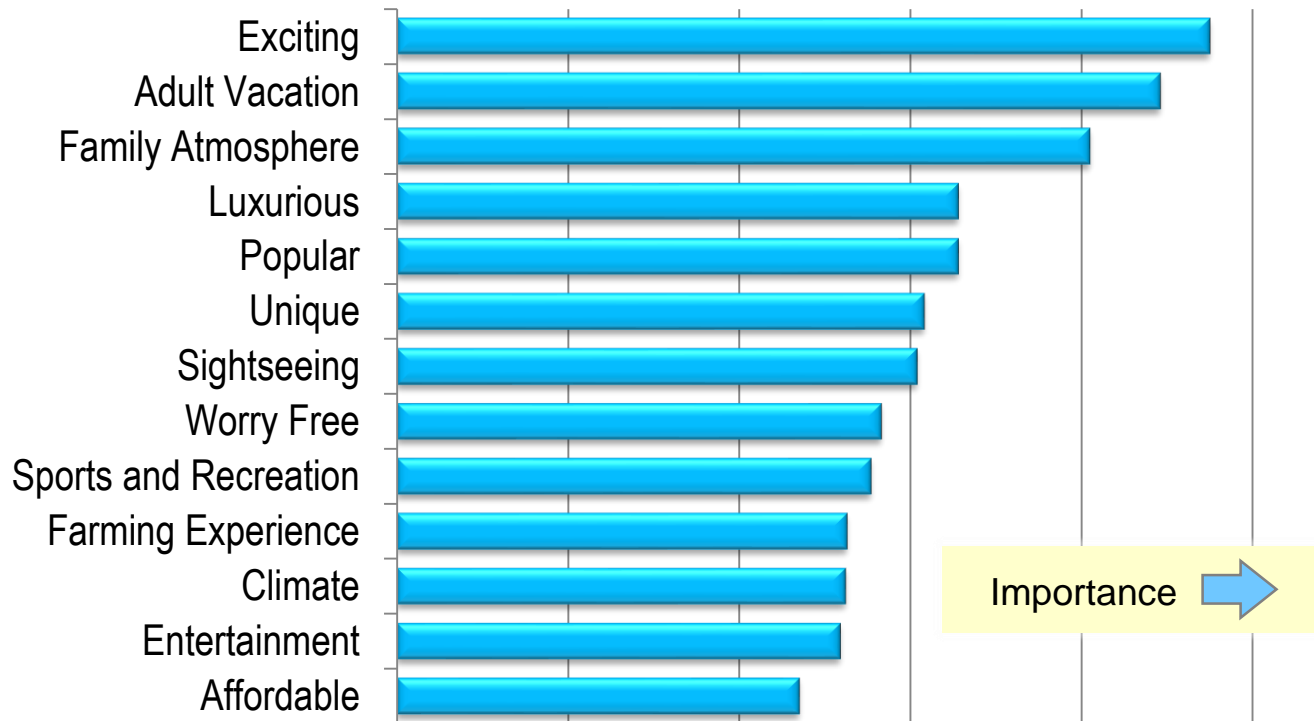
# Travel Motivators & Hot Buttons

# Travel Motivators

- In order to determine the key factors that motivate travel and destination of choice, respondents are asked to rate selected states across a robust list of **attributes** or characteristics.
- Statistical correlations are then used to establish the degree of association between each attribute and the overall rating, “A place I would really enjoy visiting.”
  - *A high correlation reveals an attribute to be an important motivator. The attributes with the highest correlations are referred to as ‘Hot Buttons’.*
  - *A lower correlation reveals an attribute to be of lesser importance.*
- The Travel Motivating **factors** are calculations that reflect the aggregated importance across attributes related by subject.

# Travel Motivators

Base: Residents of Oregon's Regional Advertising Markets



\*A measure of the degree of association between each factor and whether destination is a place "I would really enjoy visiting."

# Top 10 Hot Buttons

Base: Residents of Oregon's Regional Advertising Markets

Hot Buttons
I'm inspired to visit this place
A fun place for a vacation
A place everyone should visit at least once
I would seek out information on this place
Good for a couples getaway
Great for an adult vacation
Lots of things to see and do
Great for a family vacation
Truly beautiful scenery
A vacation there is a real adventure



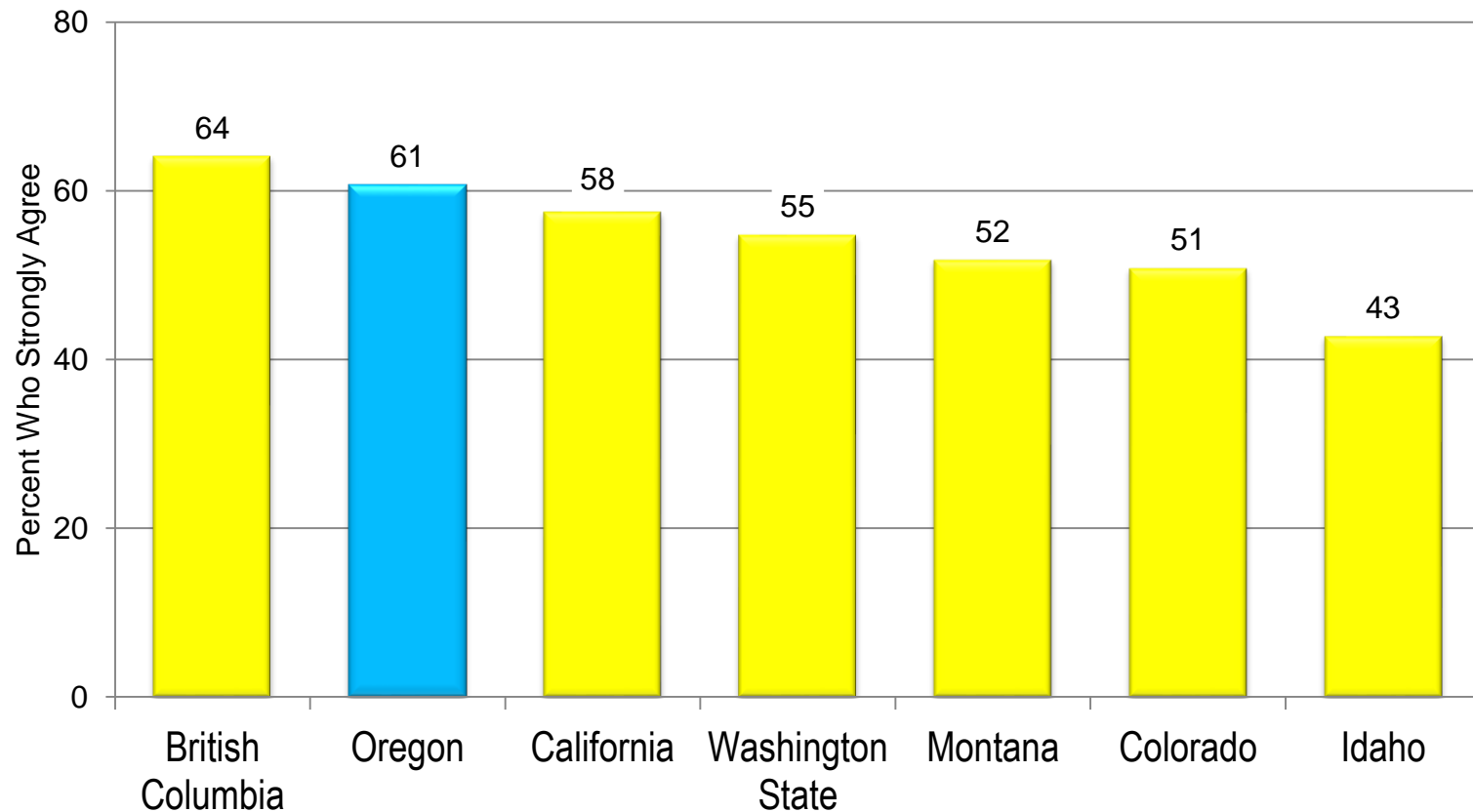


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## Oregon's Image vs. Competition

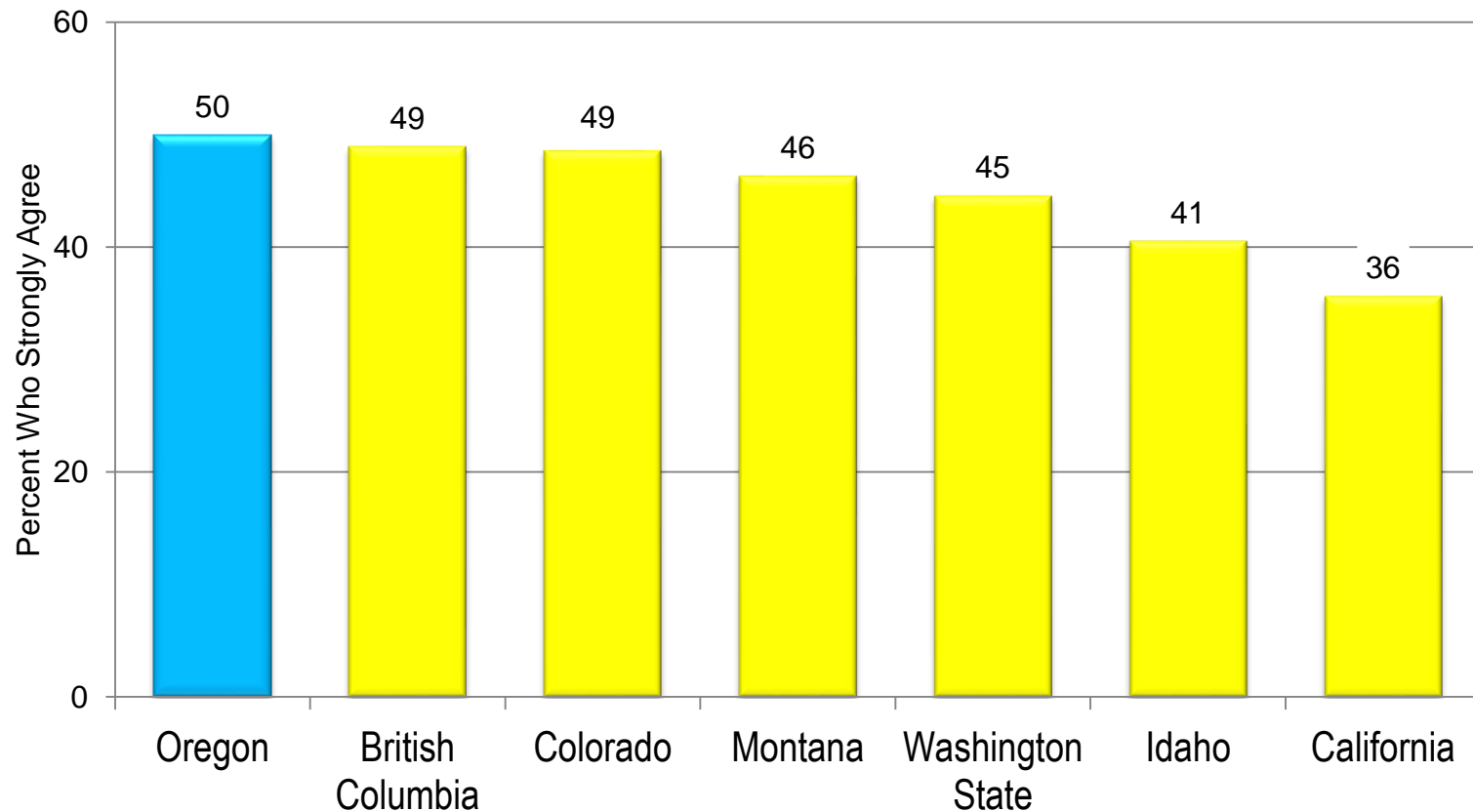
# Oregon Overall Image vs. Competition — “A Place I Would Really Enjoy Visiting”

Base: Residents of Oregon's Regional Advertising Markets



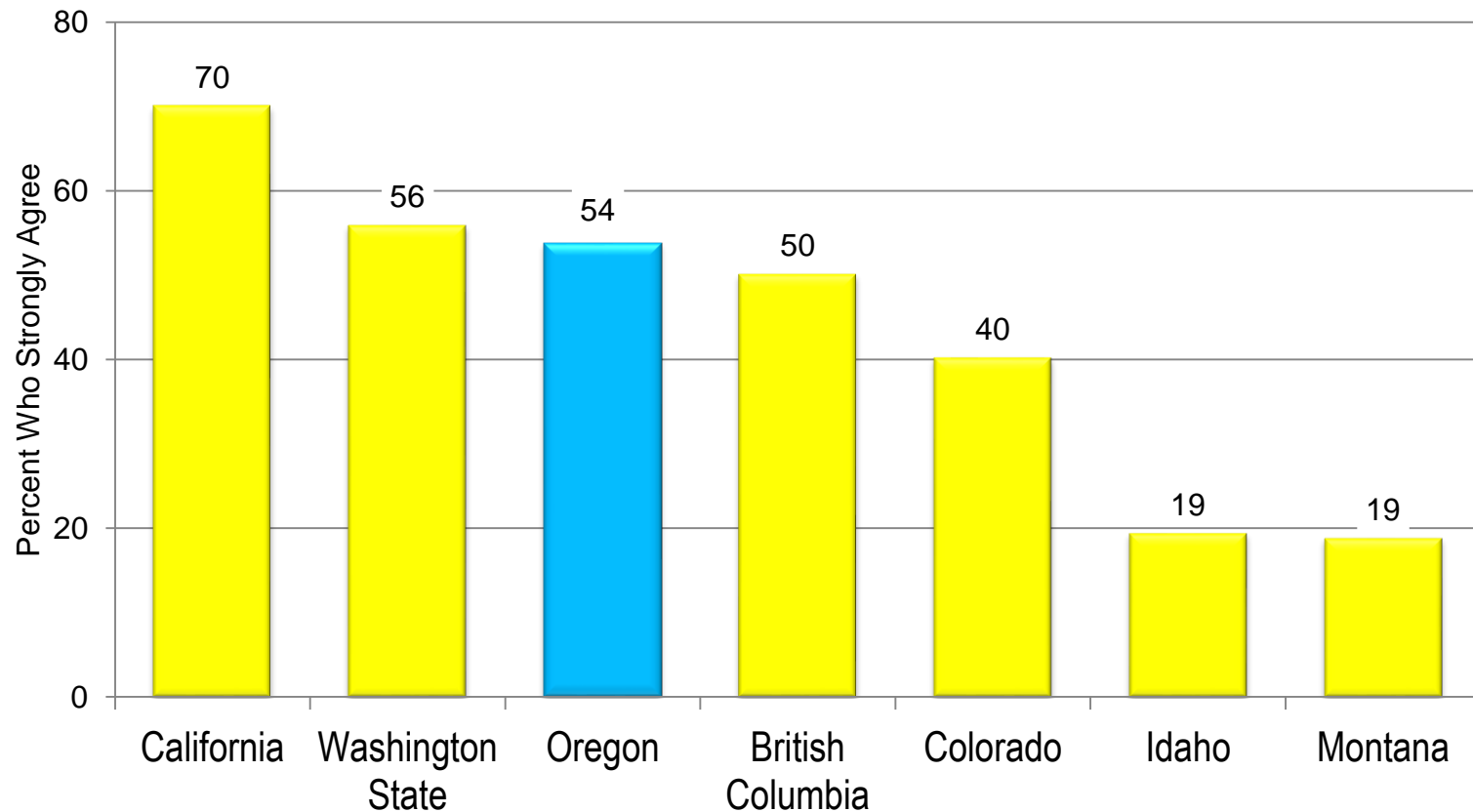
# Oregon Overall Image vs. Competition — “Excellent Vacation Value”

Base: Residents of Oregon's Regional Advertising Markets



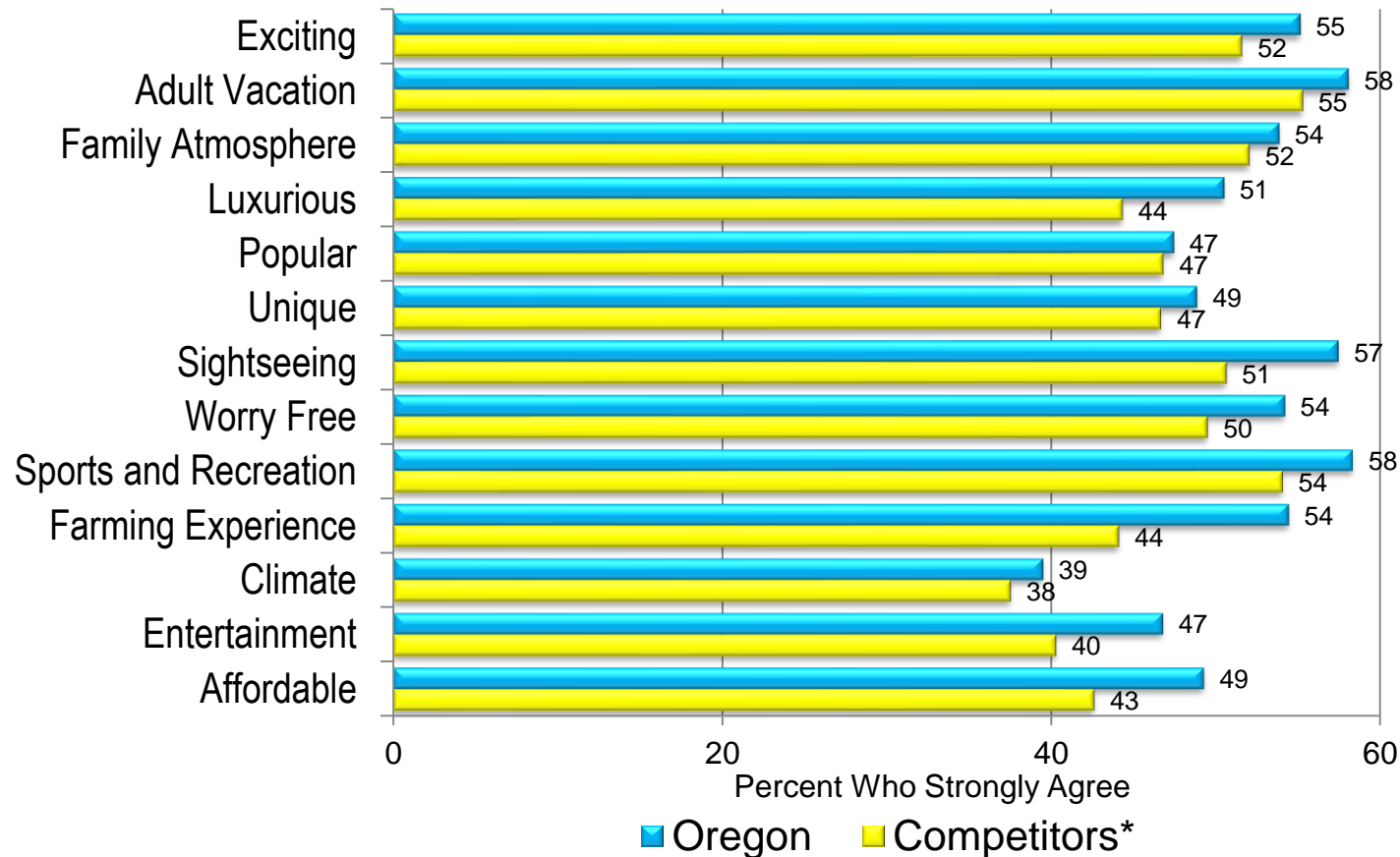
# Oregon Overall Image vs. Competition — “LGBT-Friendly Destination”

Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Overall Image vs. Competition

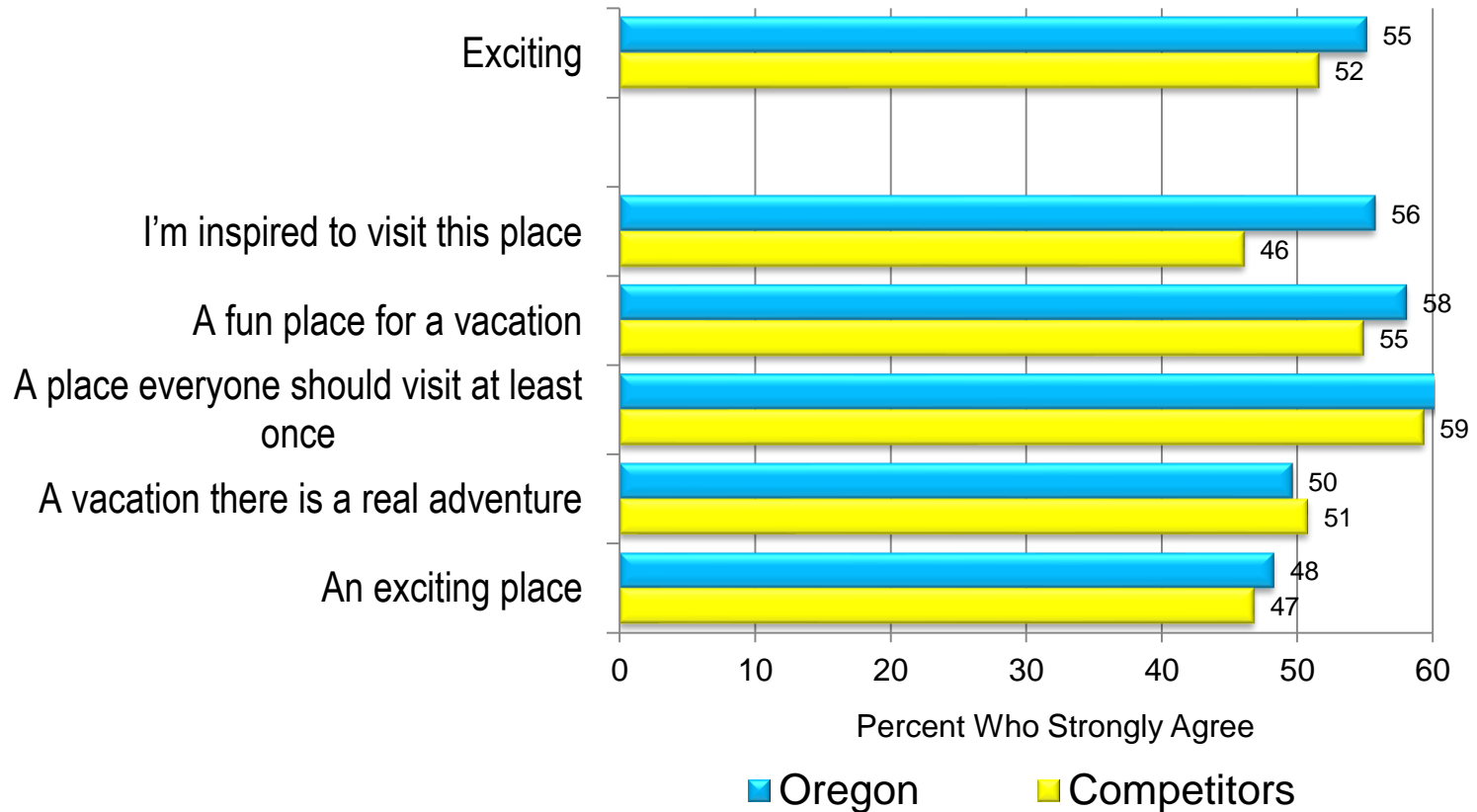
Base: Residents of Oregon's Regional Advertising Markets



\* Includes Idaho, Washington, British Columbia, Colorado, Montana, and California

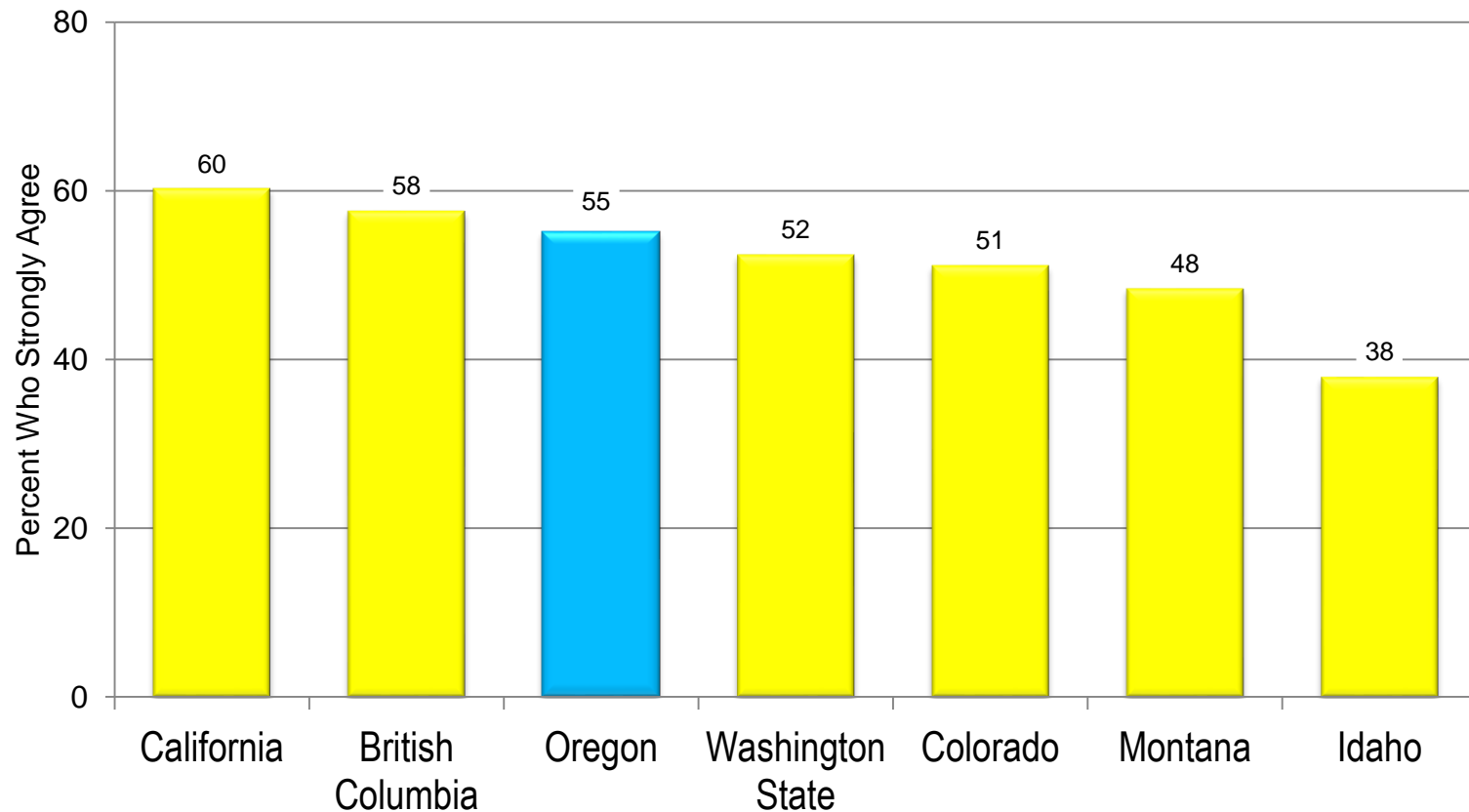
# Oregon's Image vs. Competition — Exciting

Base: Residents of Oregon's Regional Advertising Markets



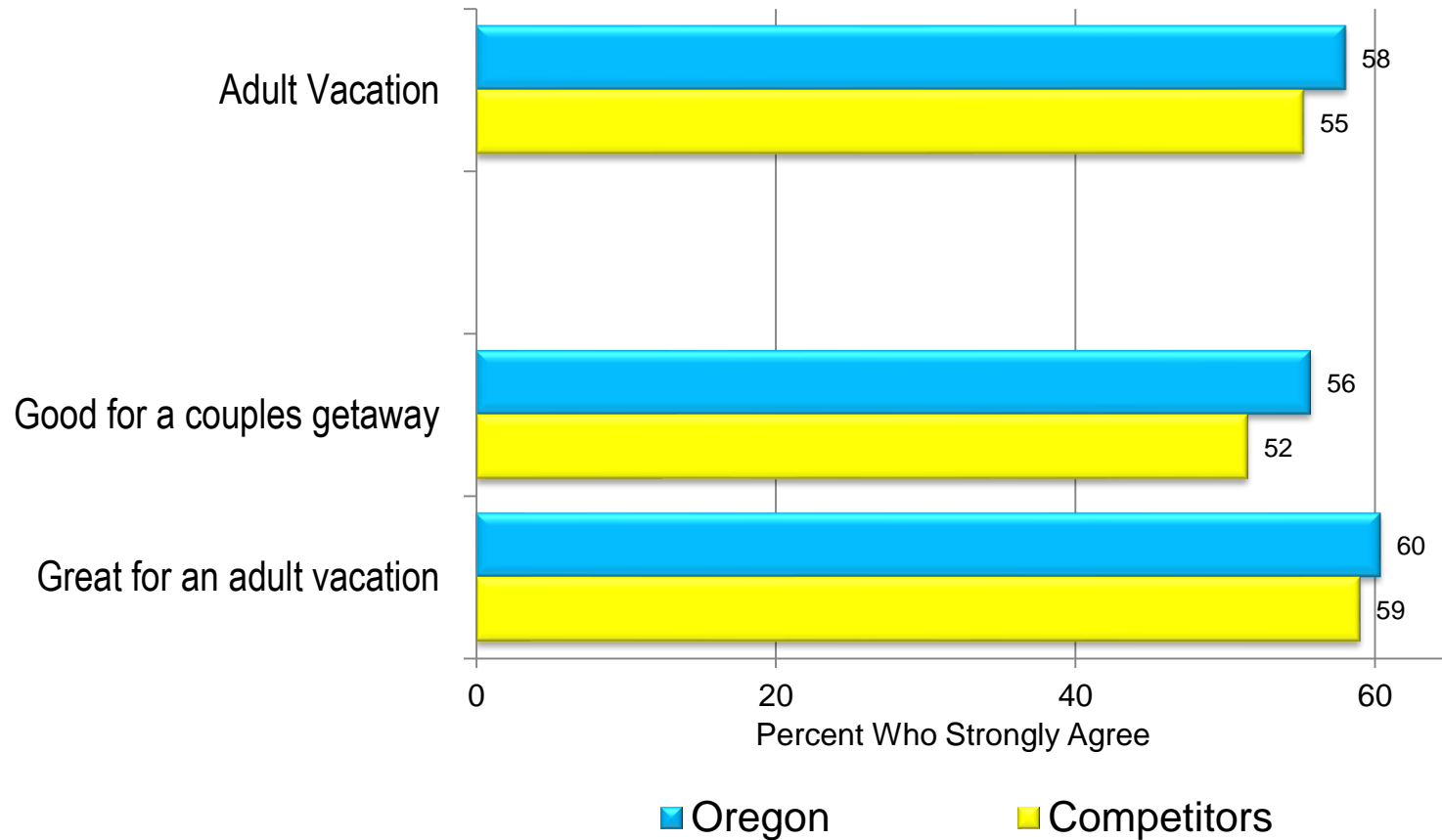
# Oregon's Image vs. Competition — Exciting

Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image vs. Competition — Adult Vacation

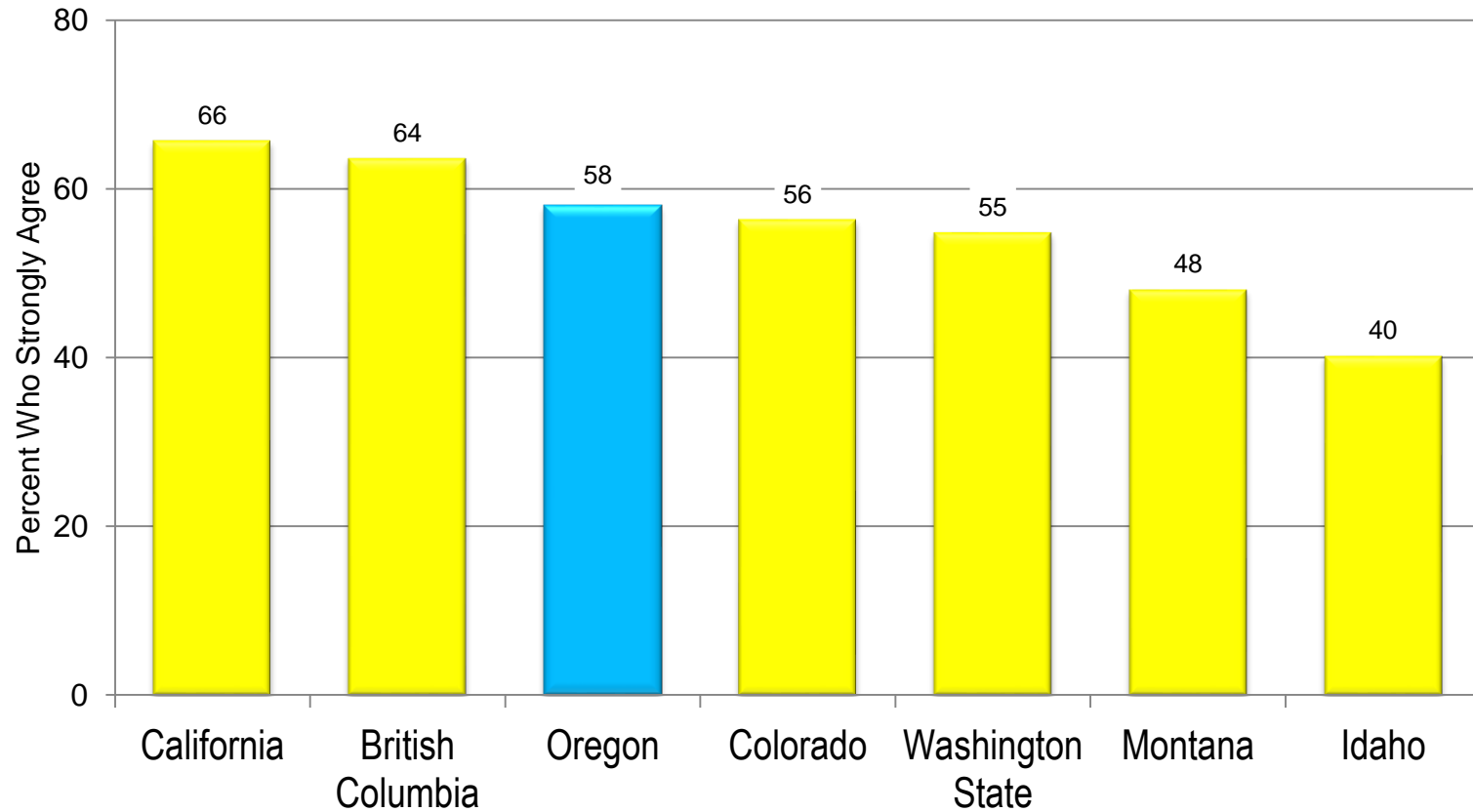
Base: Residents of Oregon's Regional Advertising Markets





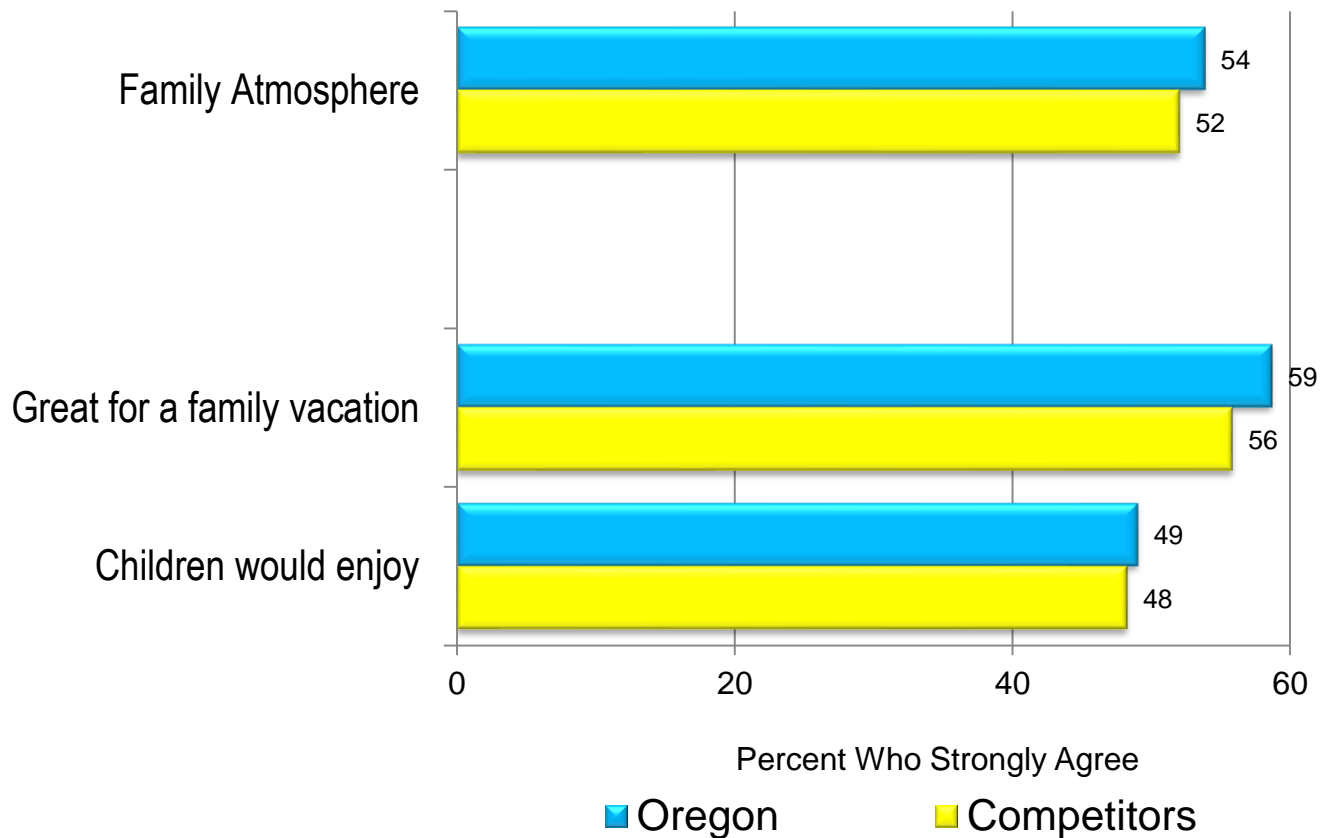
# Oregon's Image vs. Competition — Adult Vacation

Base: Residents of Oregon's Regional Advertising Markets



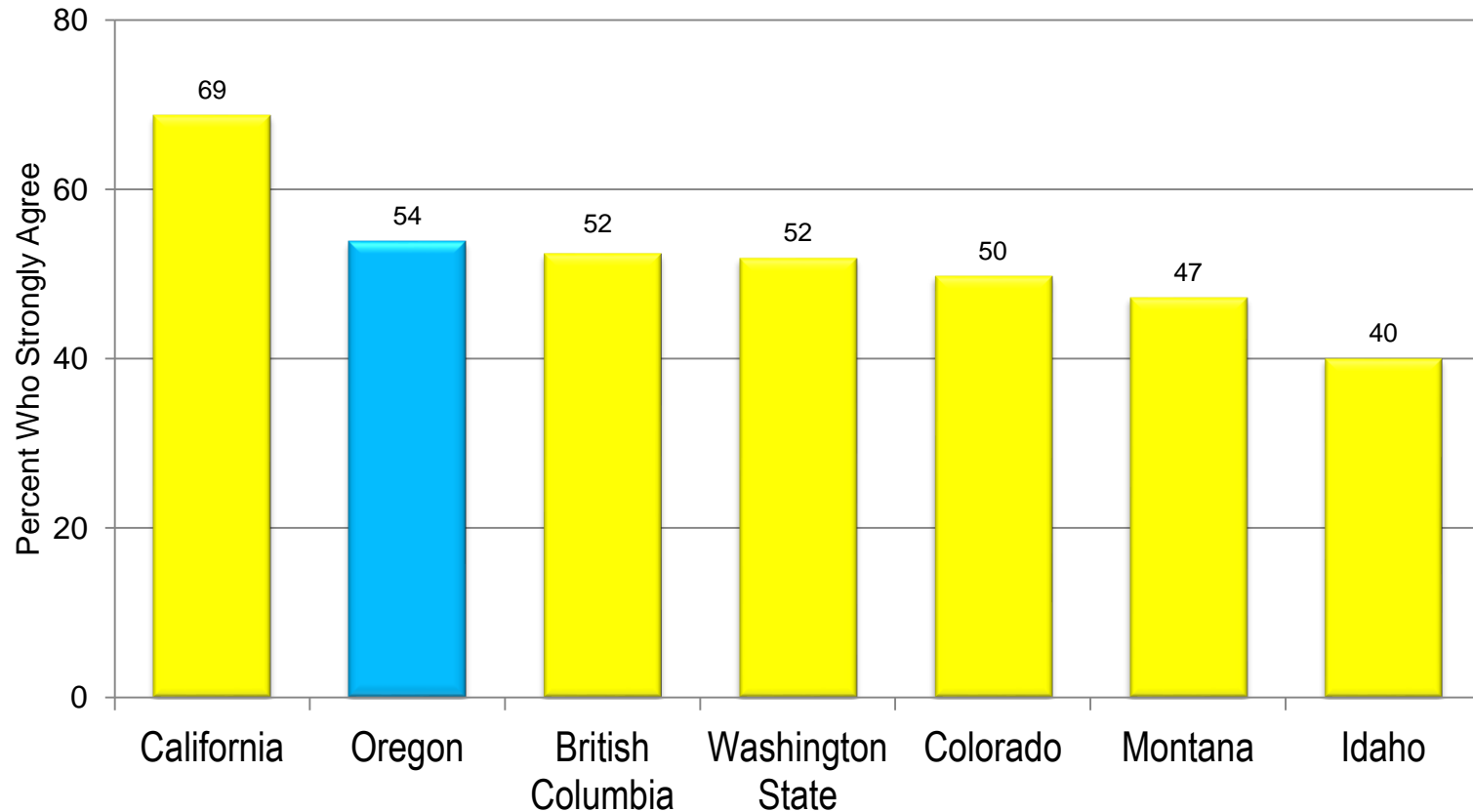
# Oregon's Image vs. Competition — Family Atmosphere

Base: Residents of Oregon's Regional Advertising Markets



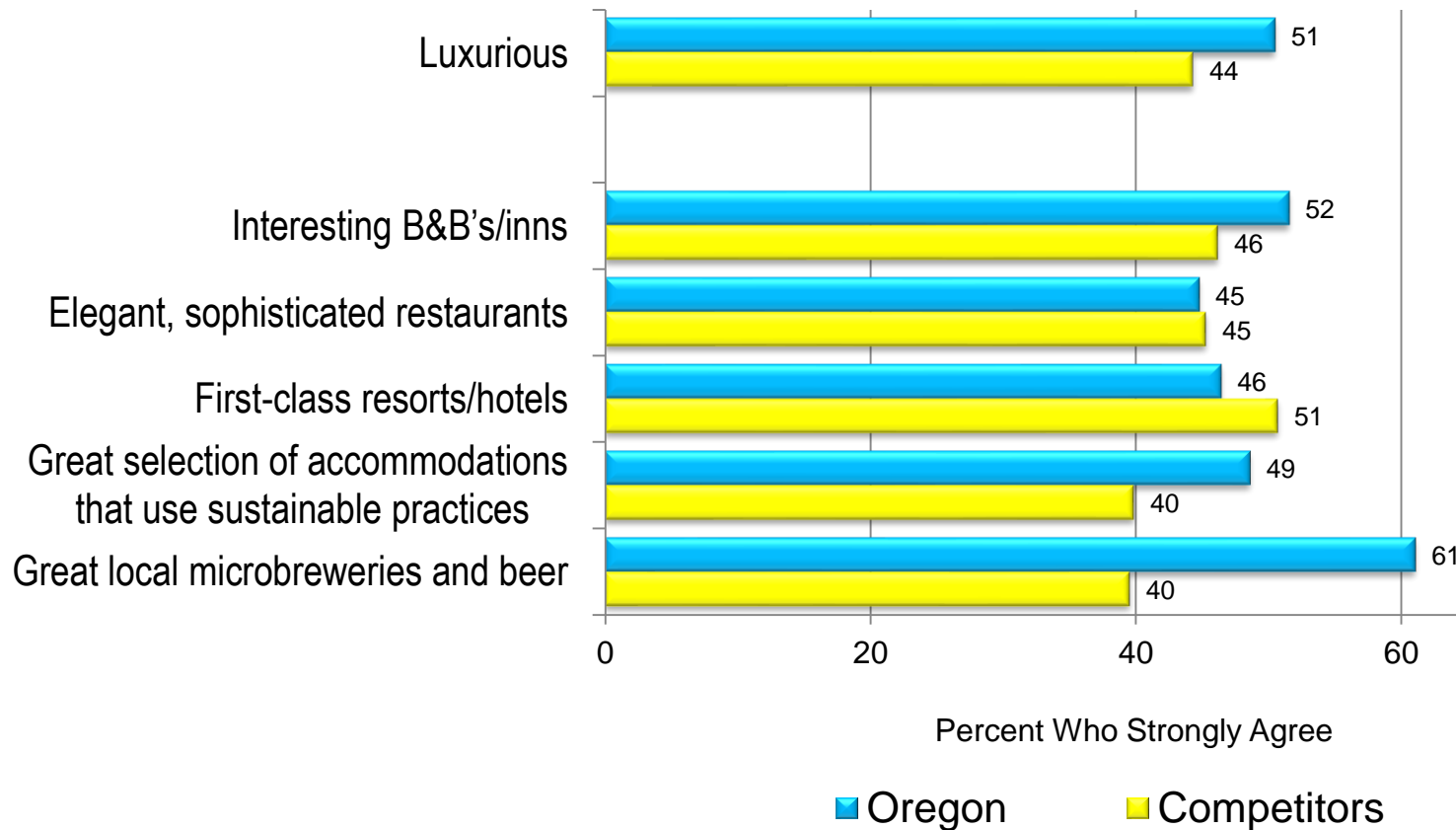
# Oregon's Image vs. Competition — Family Atmosphere

Base: Residents of Oregon's Regional Advertising Markets



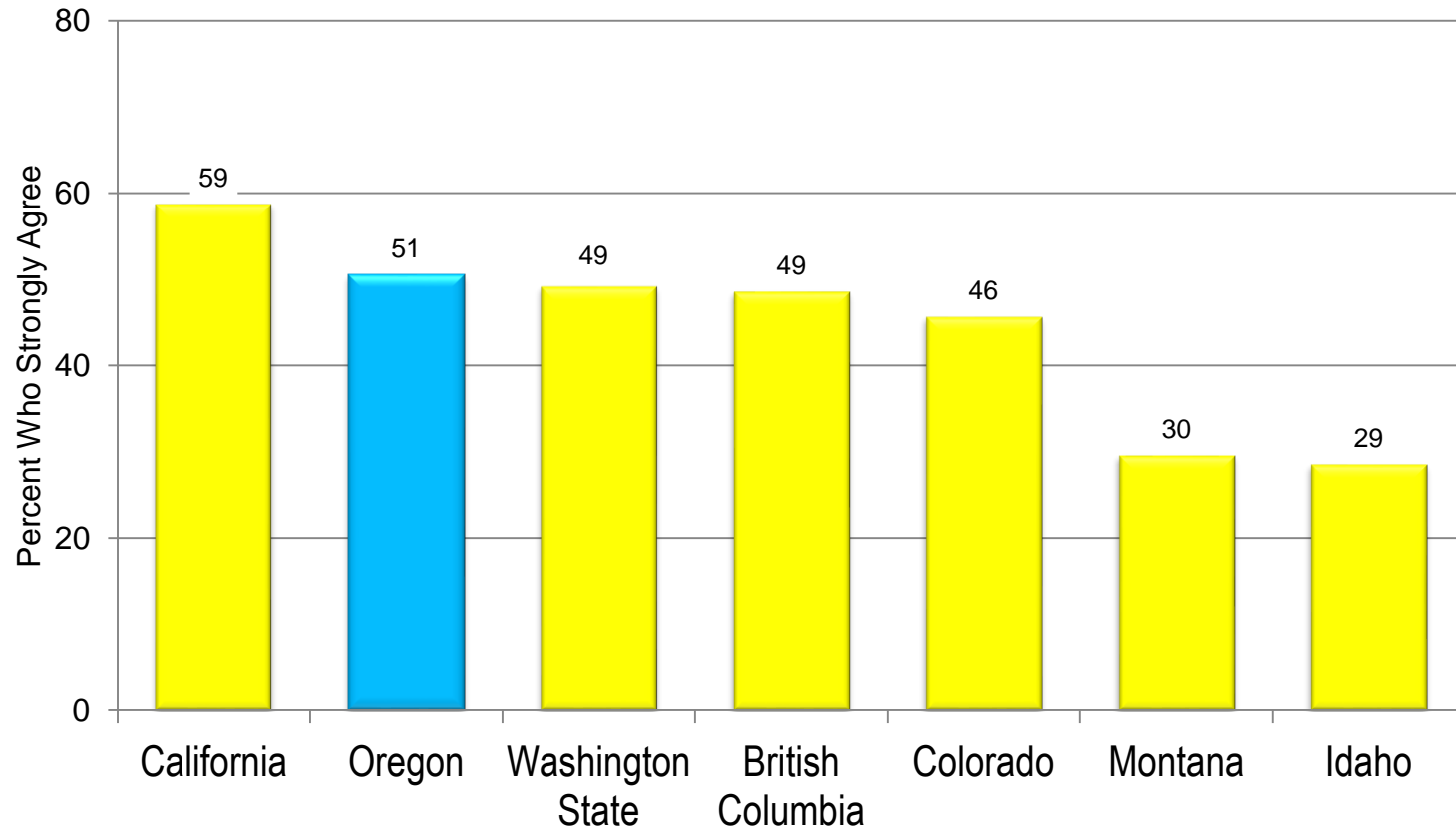
# Oregon's Image vs. Competition — Luxurious

Base: Residents of Oregon's Regional Advertising Markets



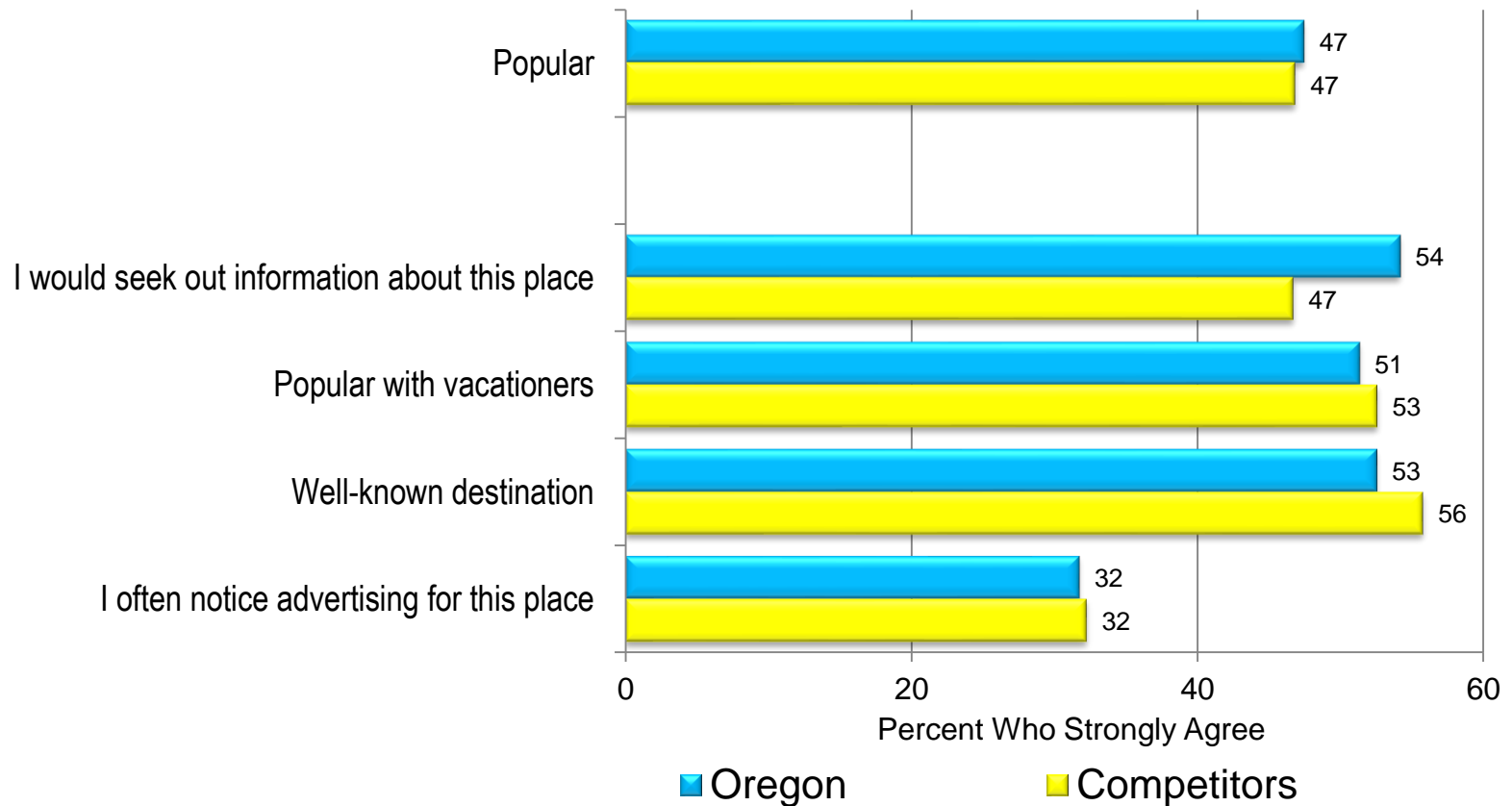
# Oregon's Image vs. Competition — Luxurious

Base: Residents of Oregon's Regional Advertising Markets



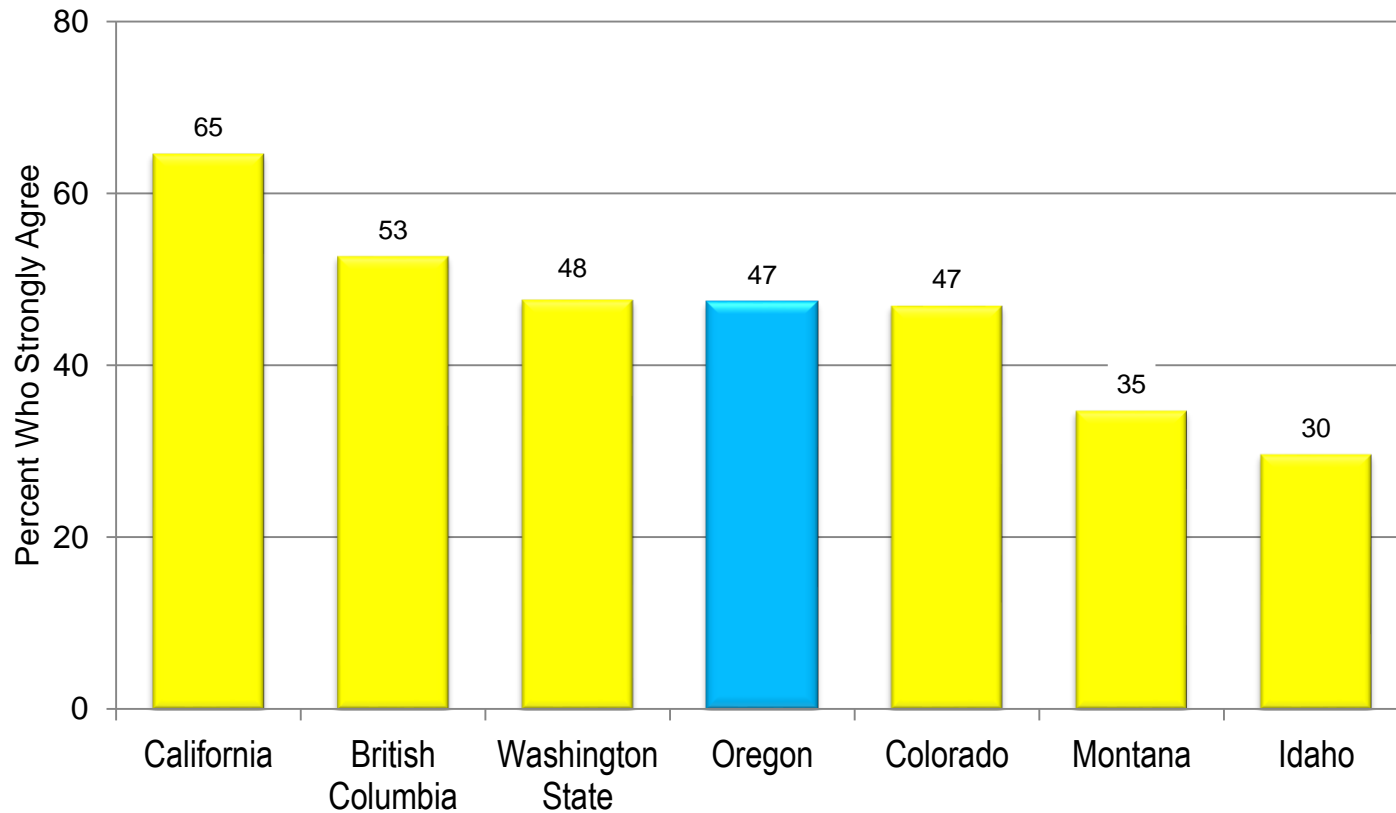
# Oregon's Image vs. Competition — Popular

Base: Residents of Oregon's Regional Advertising Markets



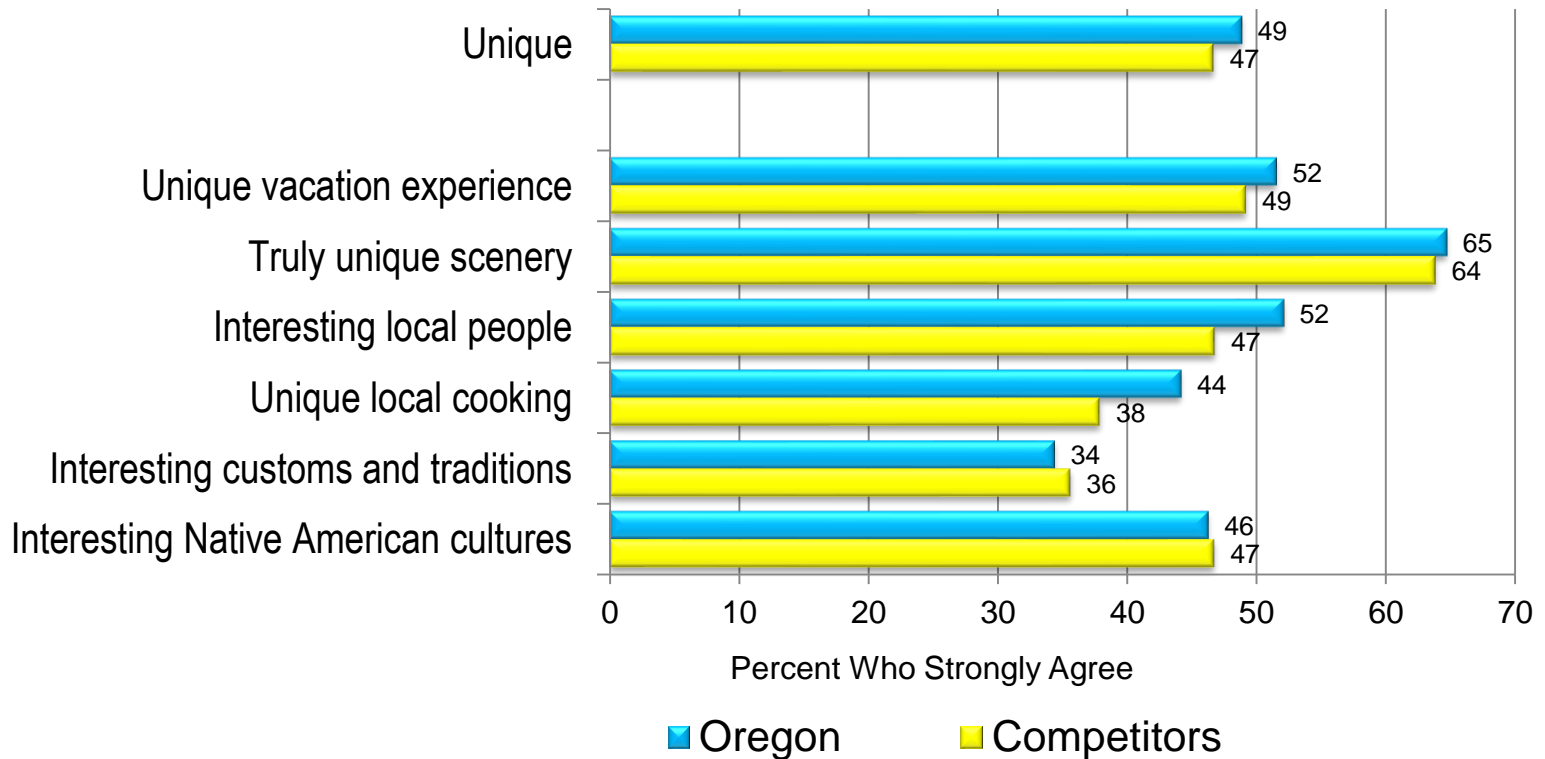
# Oregon's Image vs. Competition — Popular

Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image vs. Competition — Unique

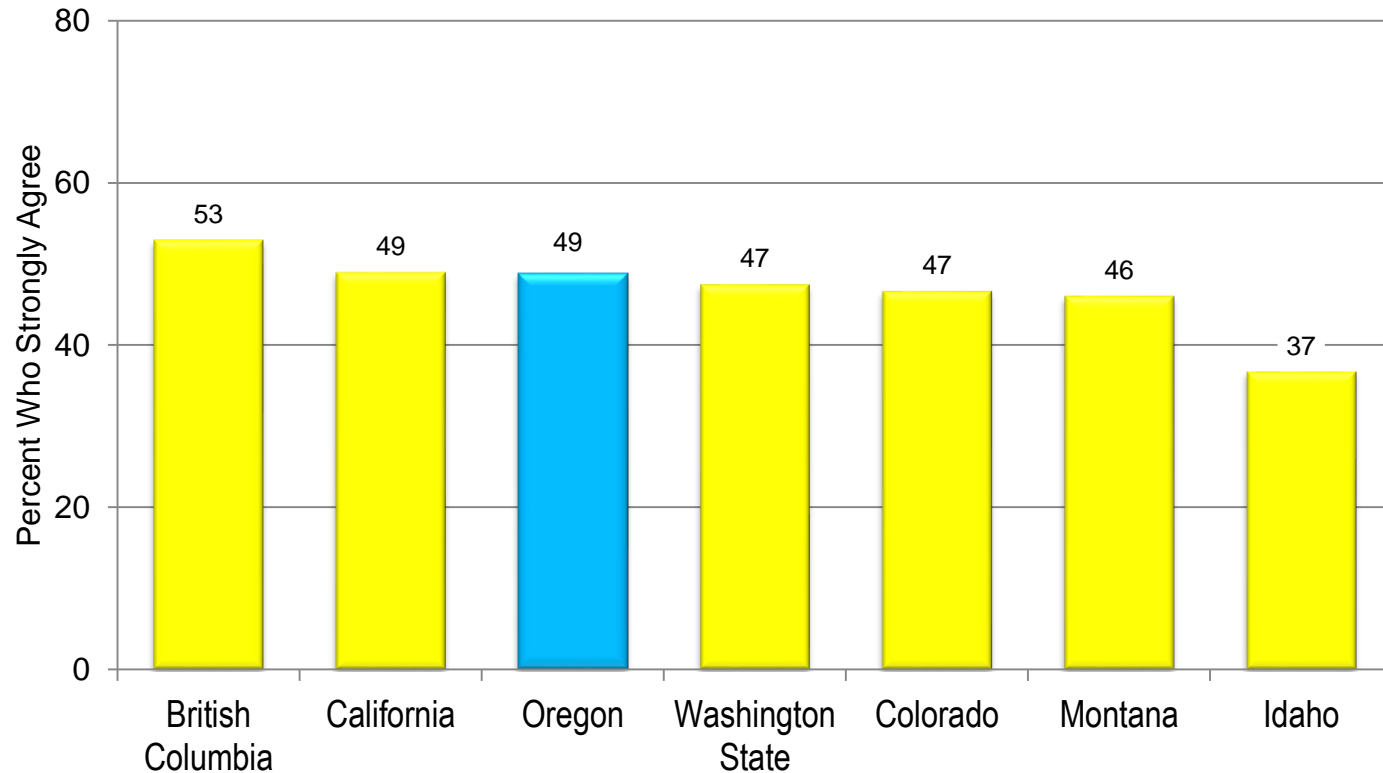
Base: Residents of Oregon's Regional Advertising Markets





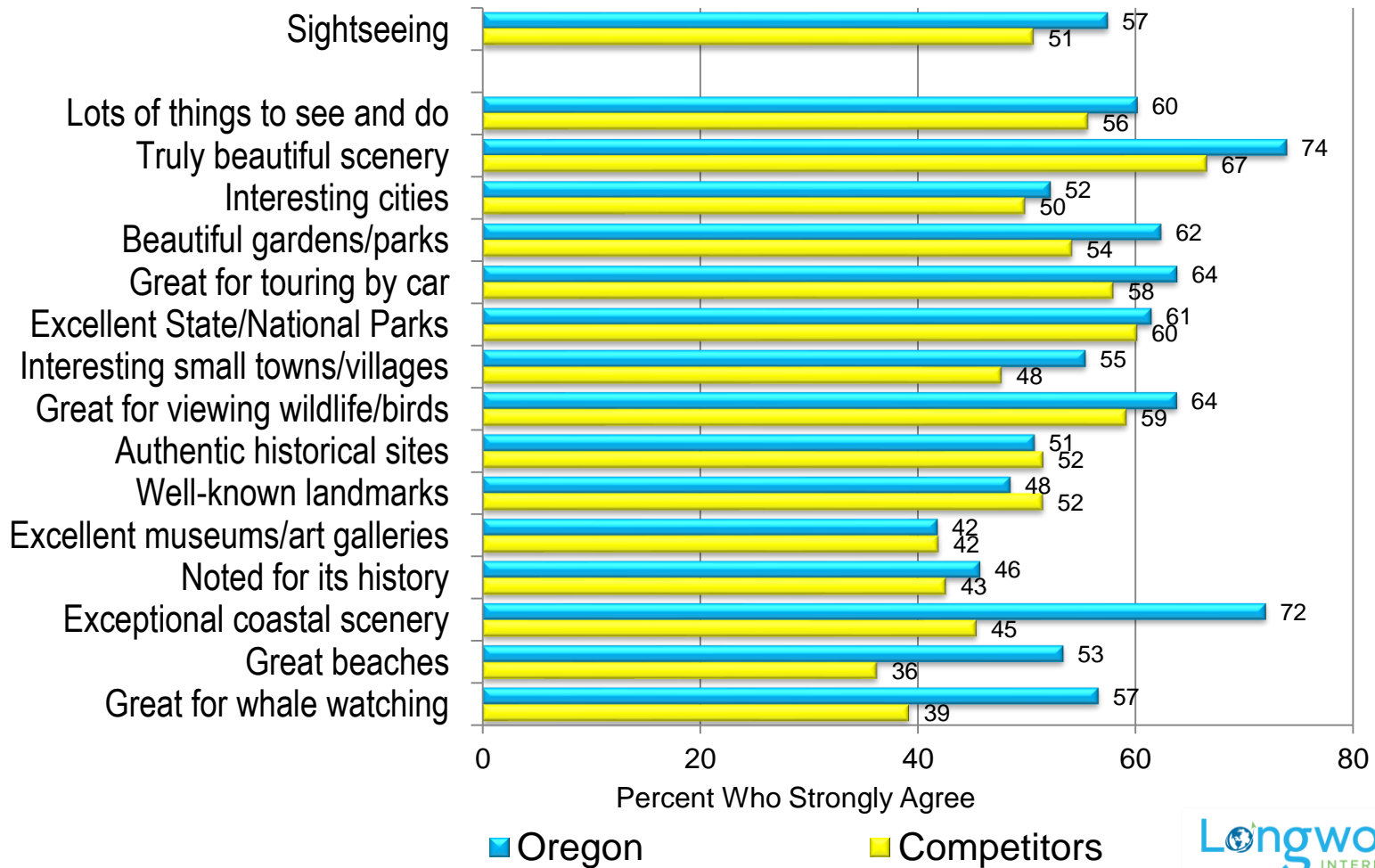
# Oregon's Image vs. Competition — Unique

Base: Residents of Oregon's Regional Advertising Markets



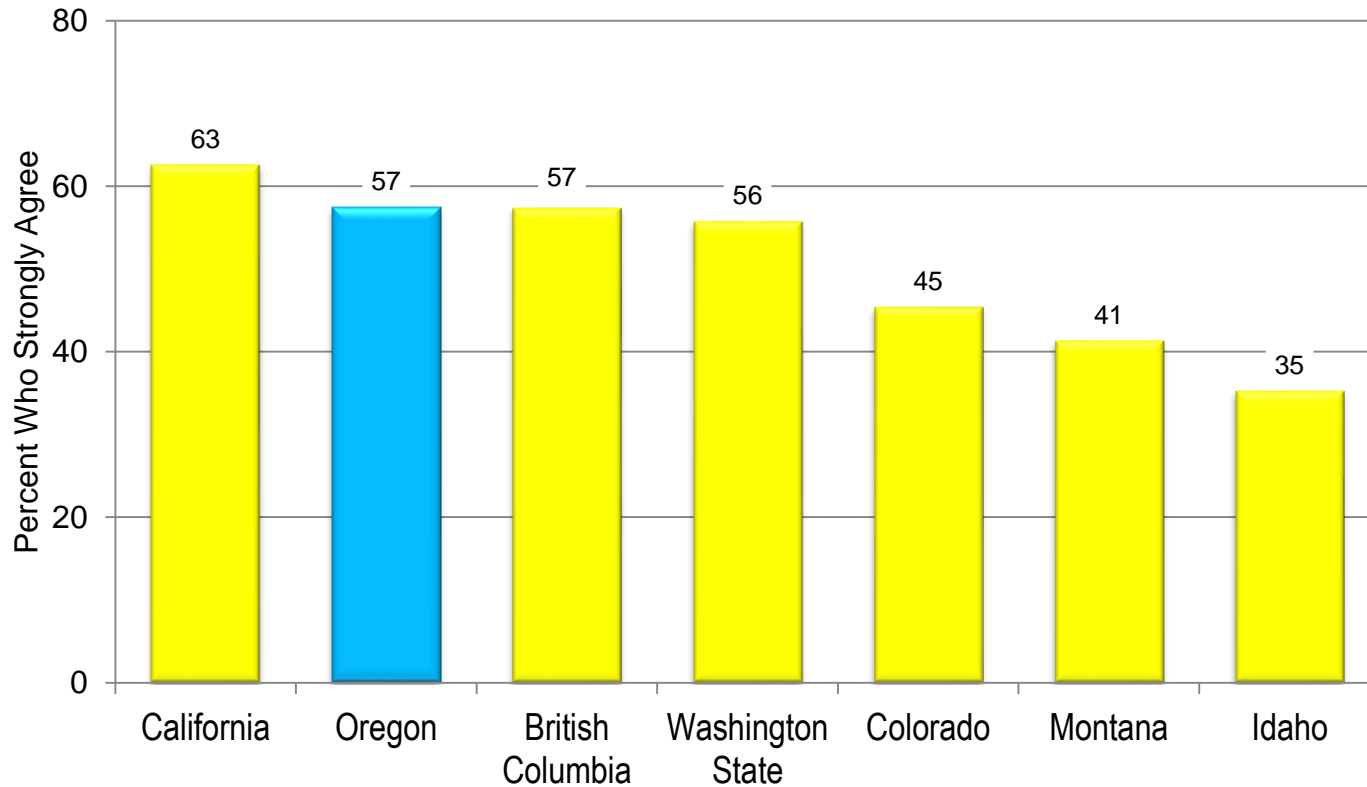
# Oregon's Image vs. Competition — Sightseeing

Base: Residents of Oregon's Regional Advertising Markets



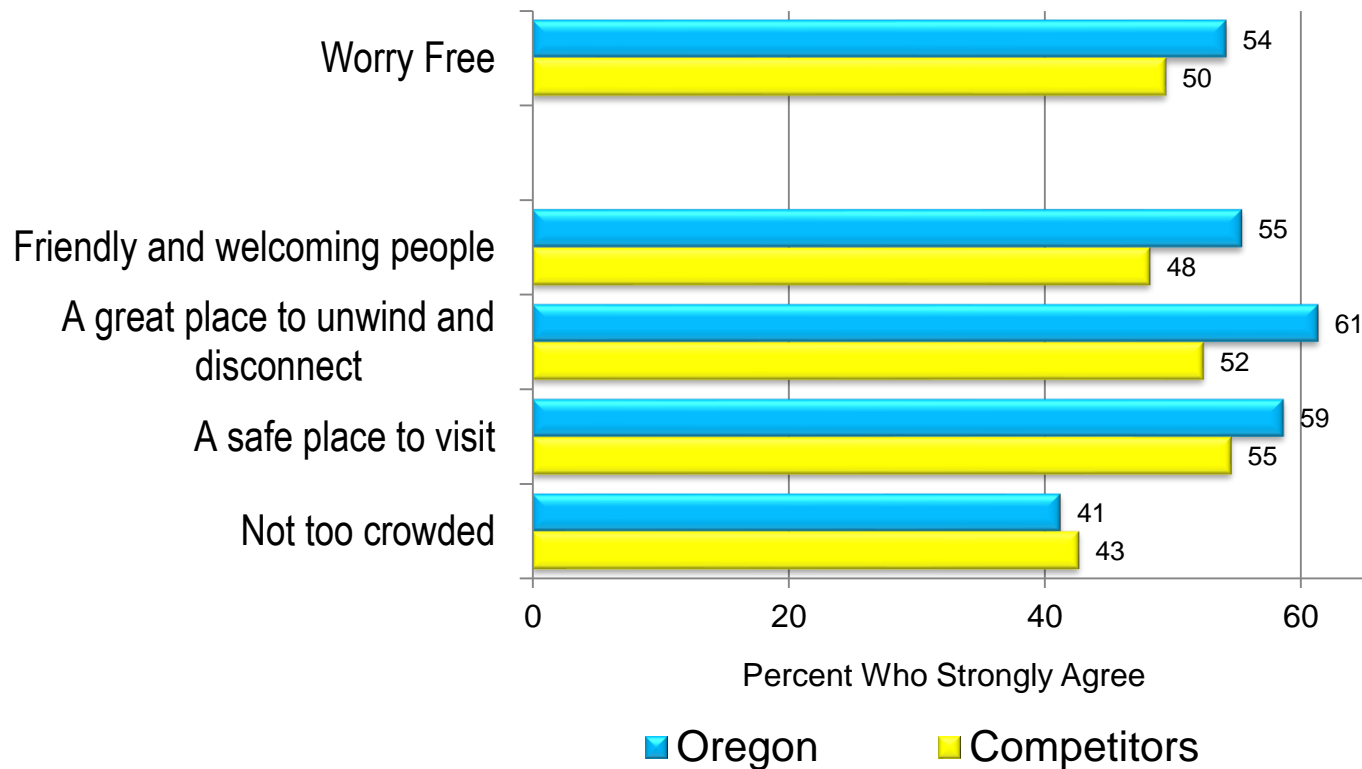
# Oregon's Image vs. Competition — Sightseeing

Base: Residents of Oregon's Regional Advertising Markets



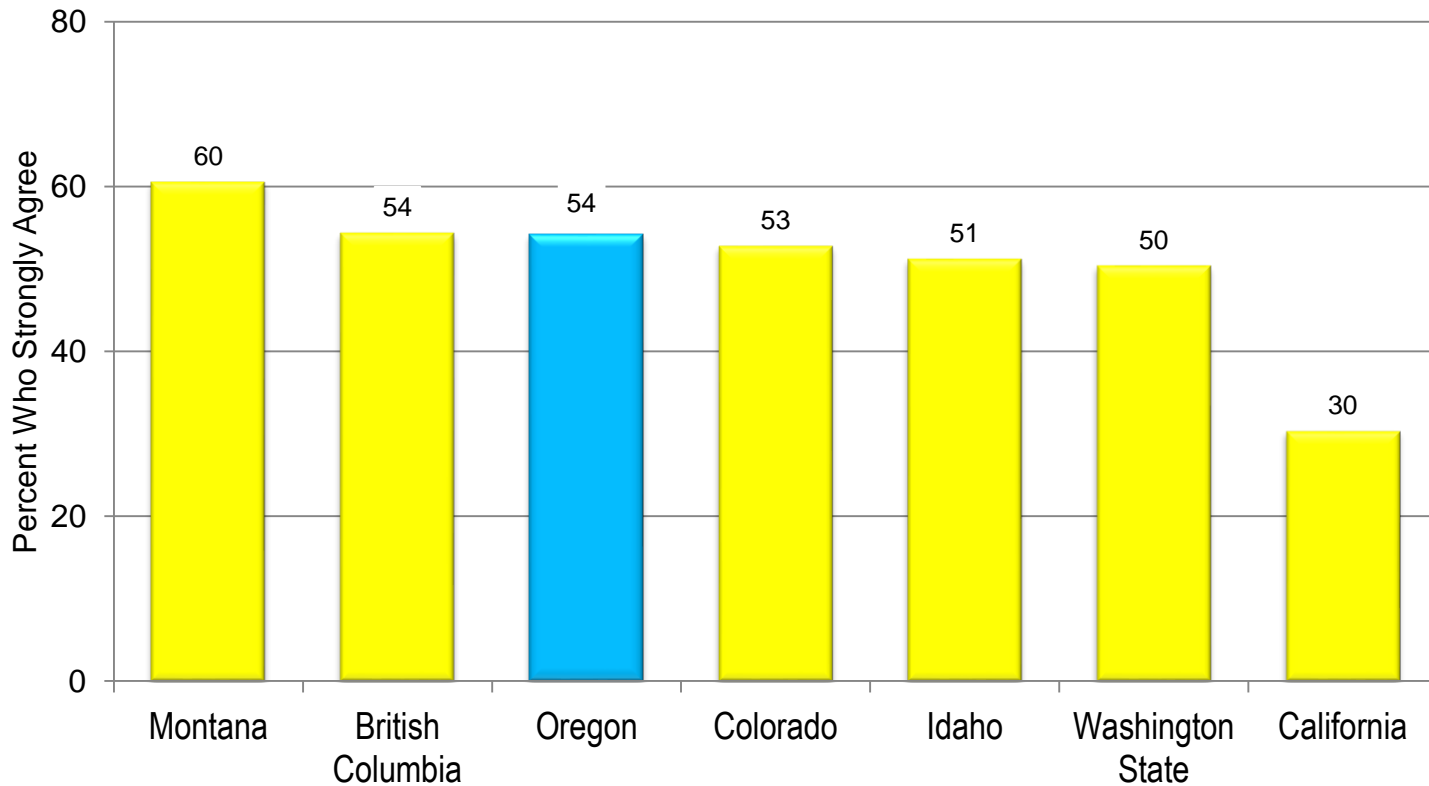
# Oregon's Image vs. Competition — Worry-free

Base: Residents of Oregon's Regional Advertising Markets



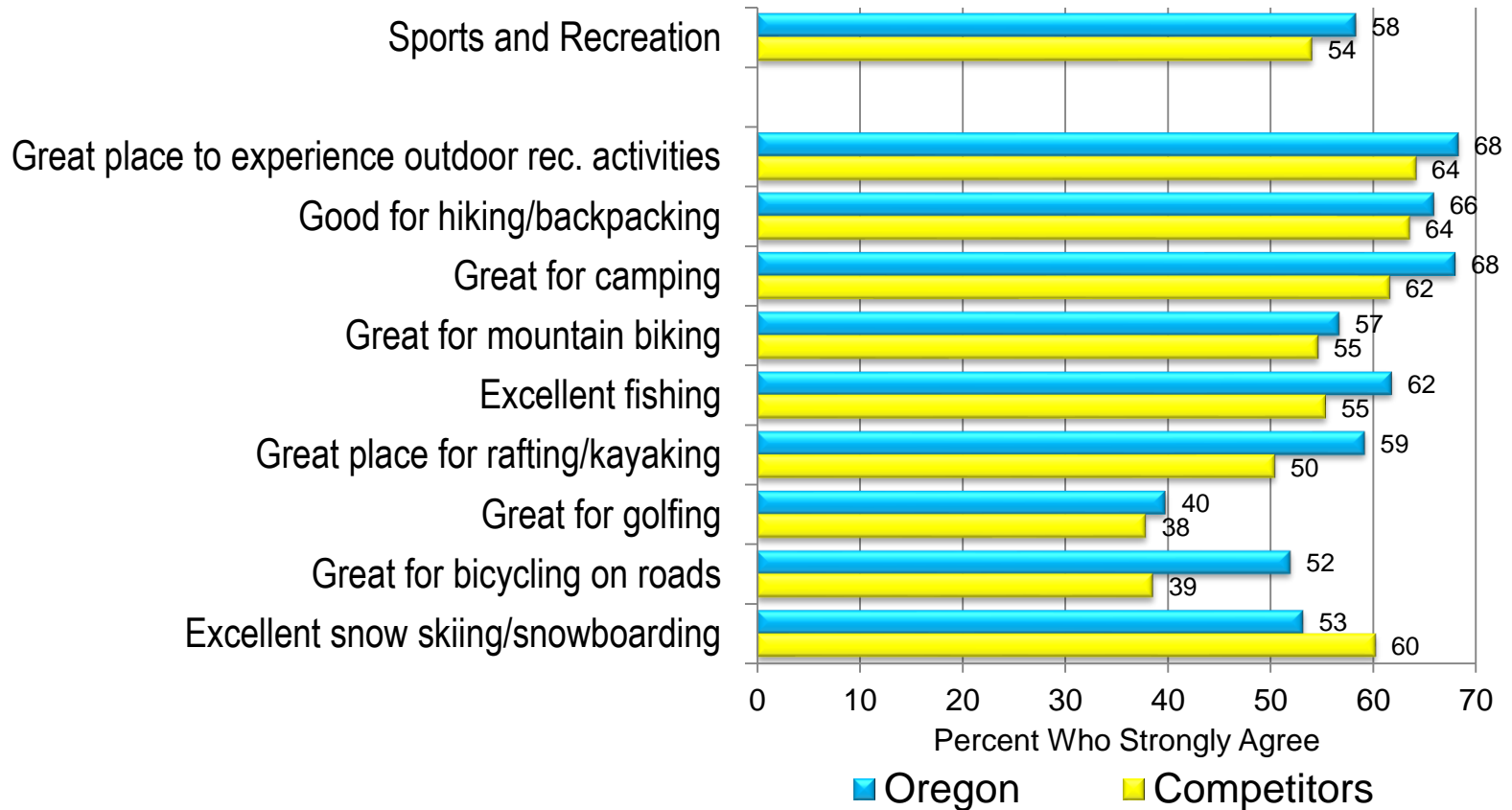
# Oregon's Image vs. Competition — Worry-free

Base: Residents of Oregon's Regional Advertising Markets



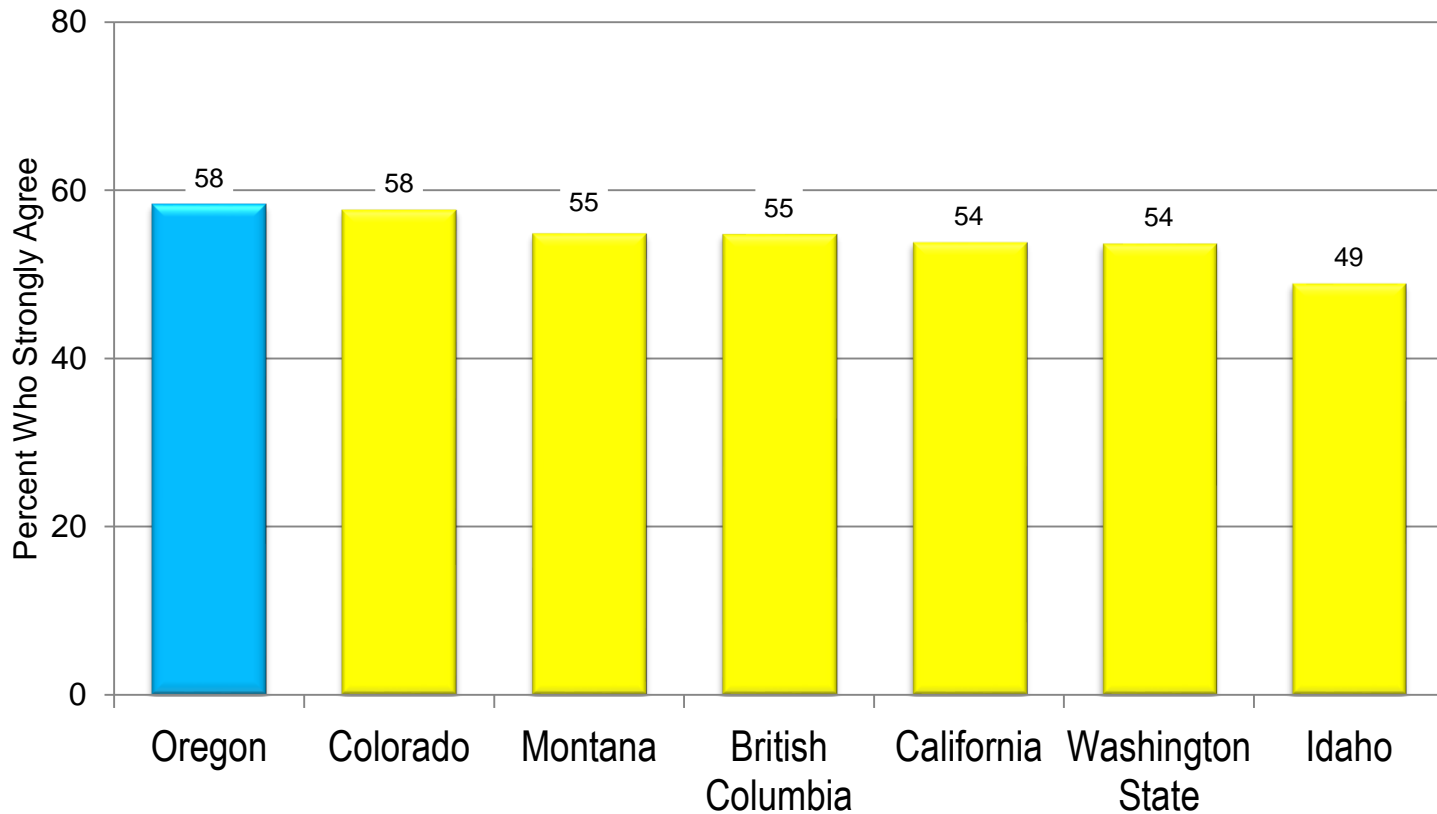
# Oregon's Image vs. Competition — Sports and Recreation

Base: Residents of Oregon's Regional Advertising Markets



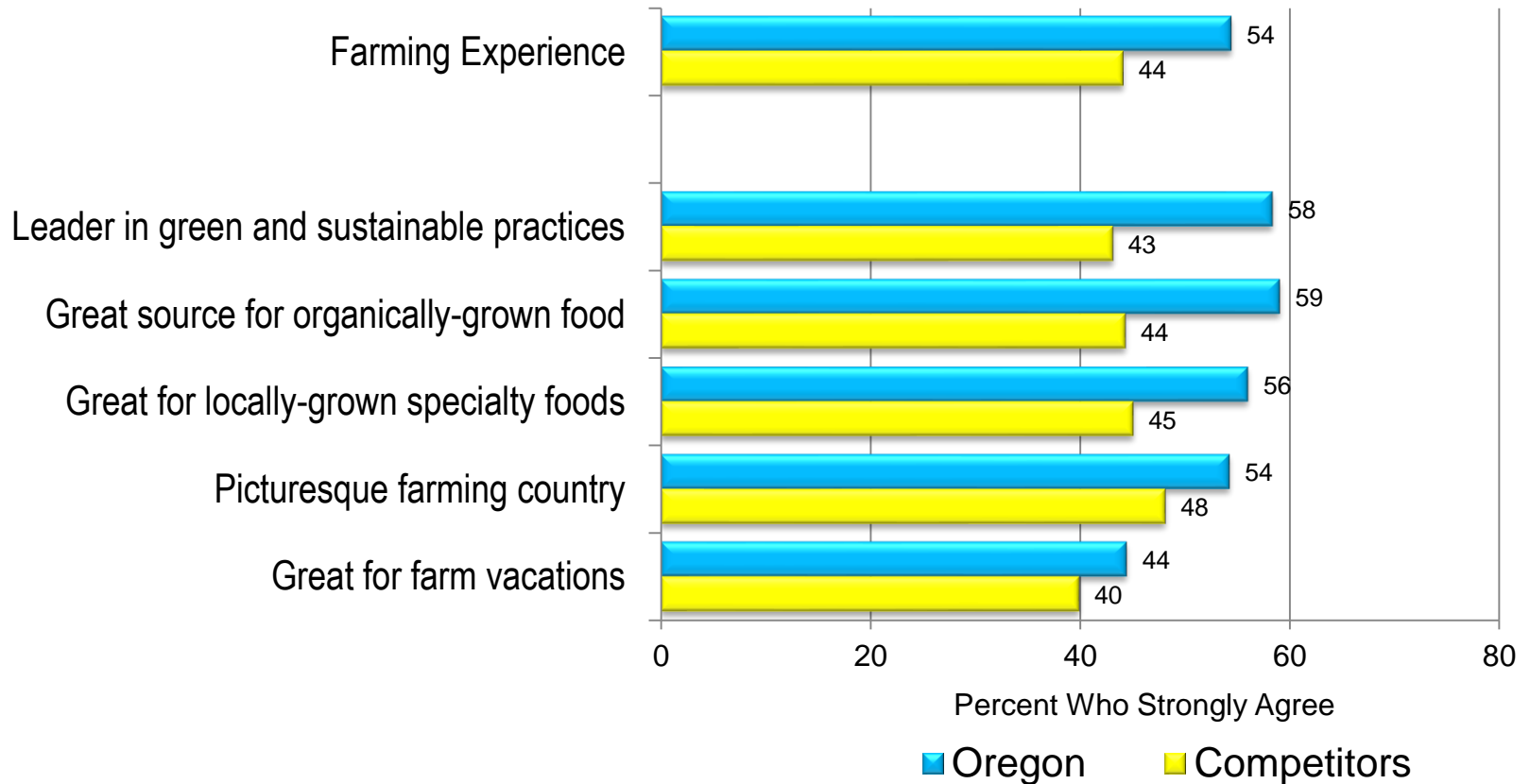
# Oregon's Image vs. Competition — Sports and Recreation

Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image vs. Competition — Farming Experience

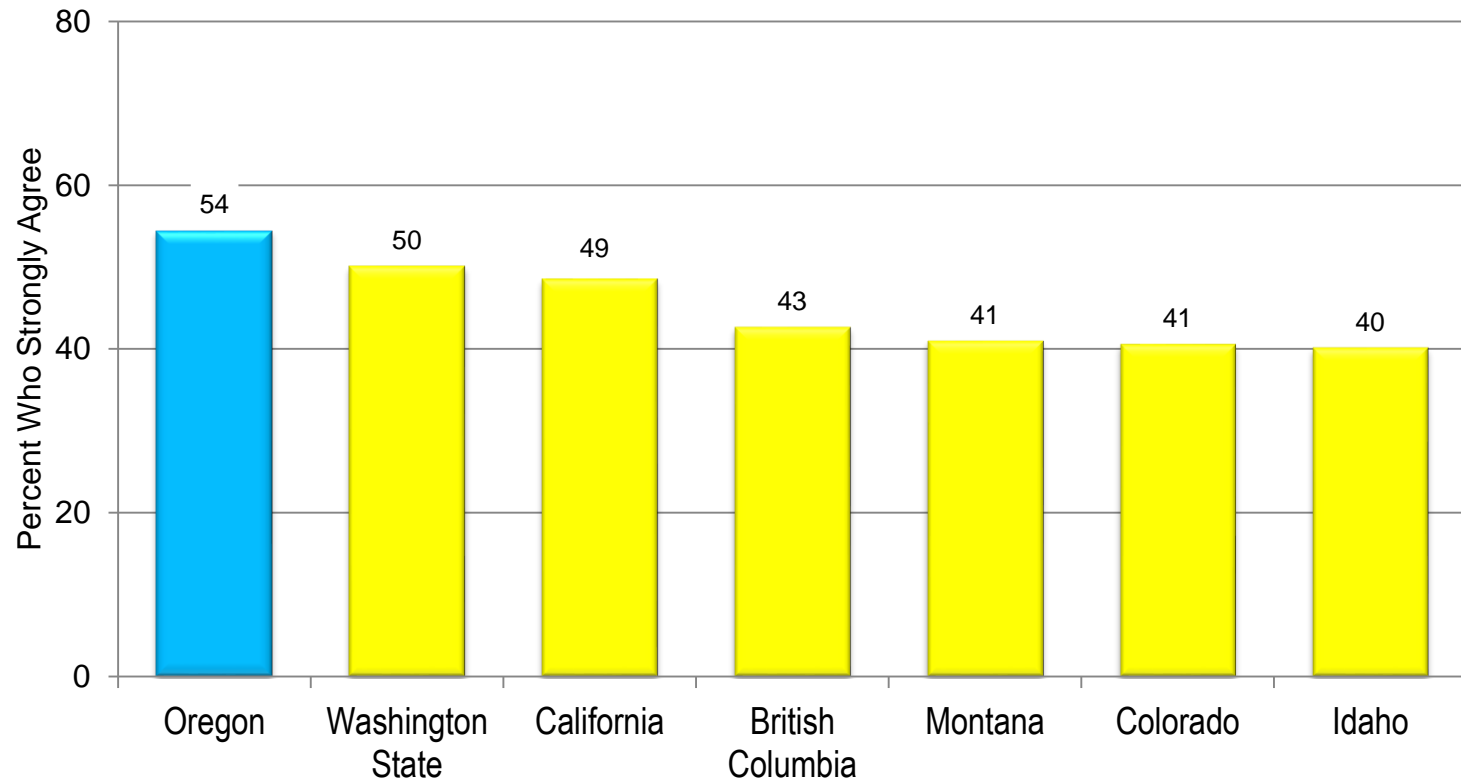
Base: Residents of Oregon's Regional Advertising Markets





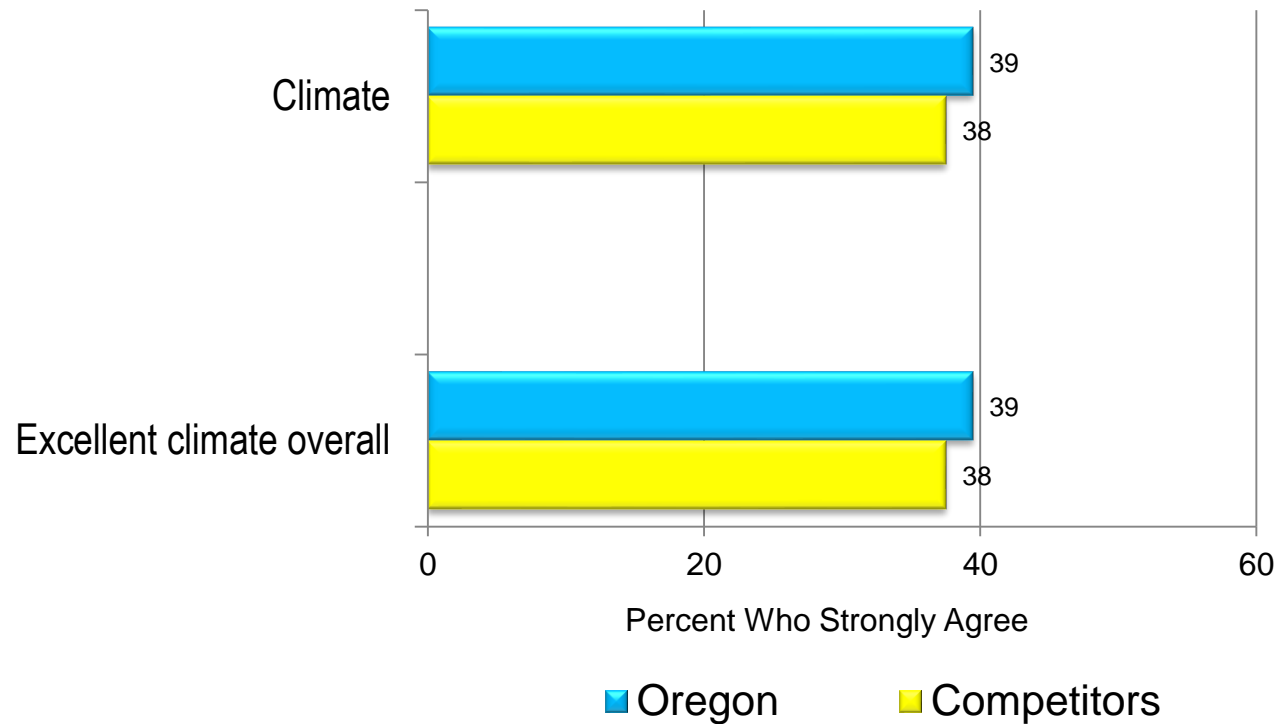
# Oregon's Image vs. Competition — Farming Experience

Base: Residents of Oregon's Regional Advertising Markets



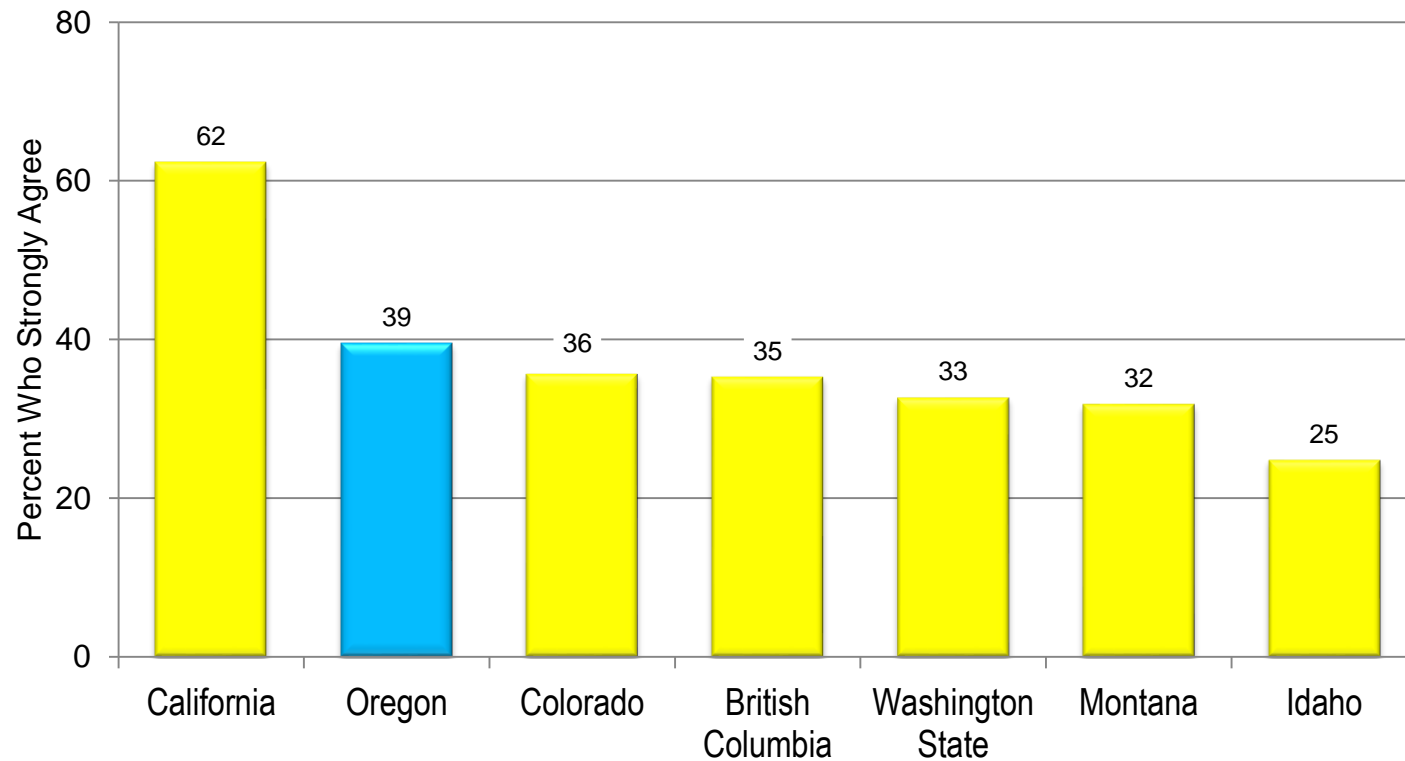
# Oregon's Image vs. Competition — Climate

Base: Residents of Oregon's Regional Advertising Markets



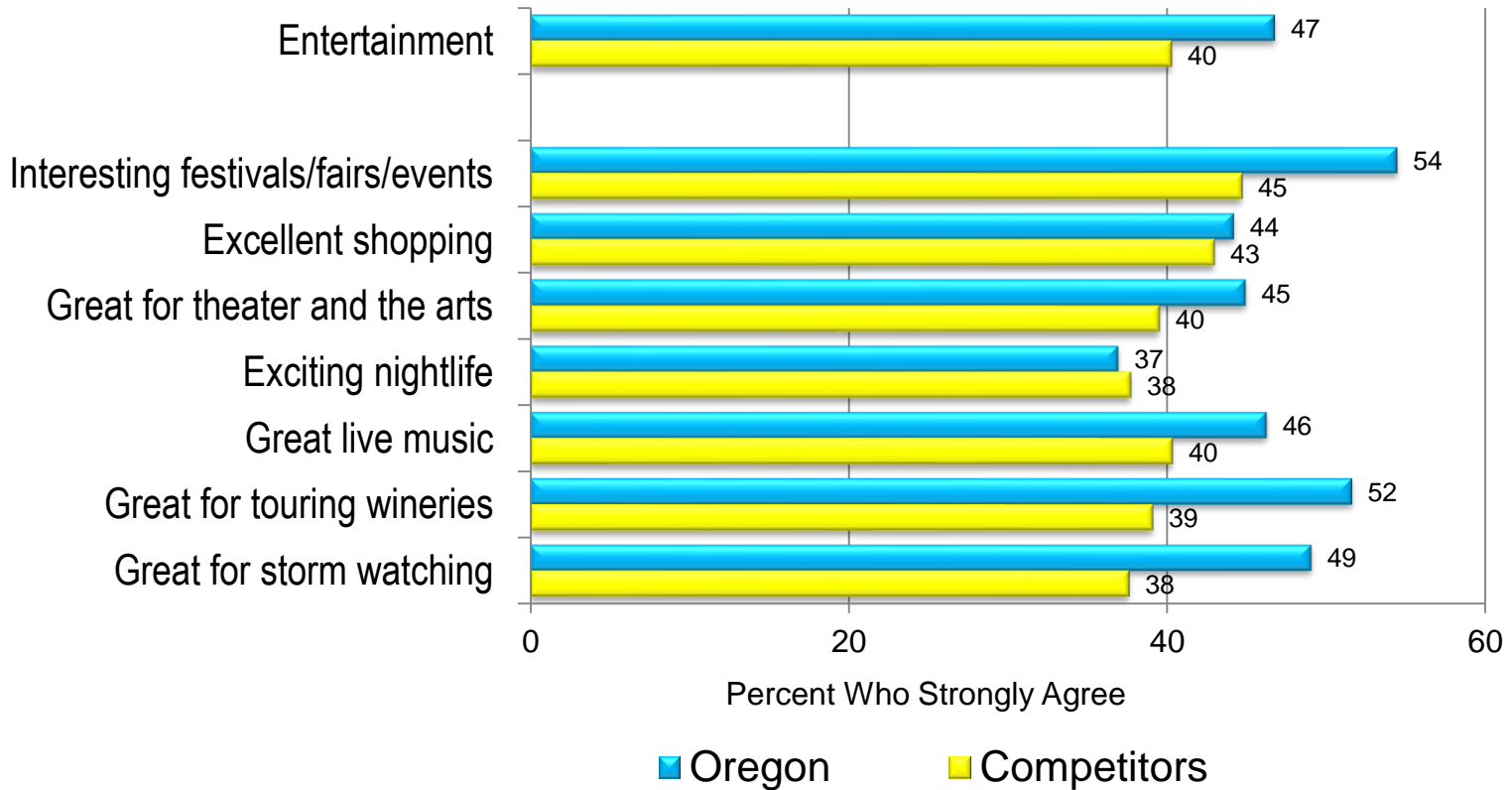
# Oregon's Image vs. Competition — Climate

Base: Residents of Oregon's Regional Advertising Markets



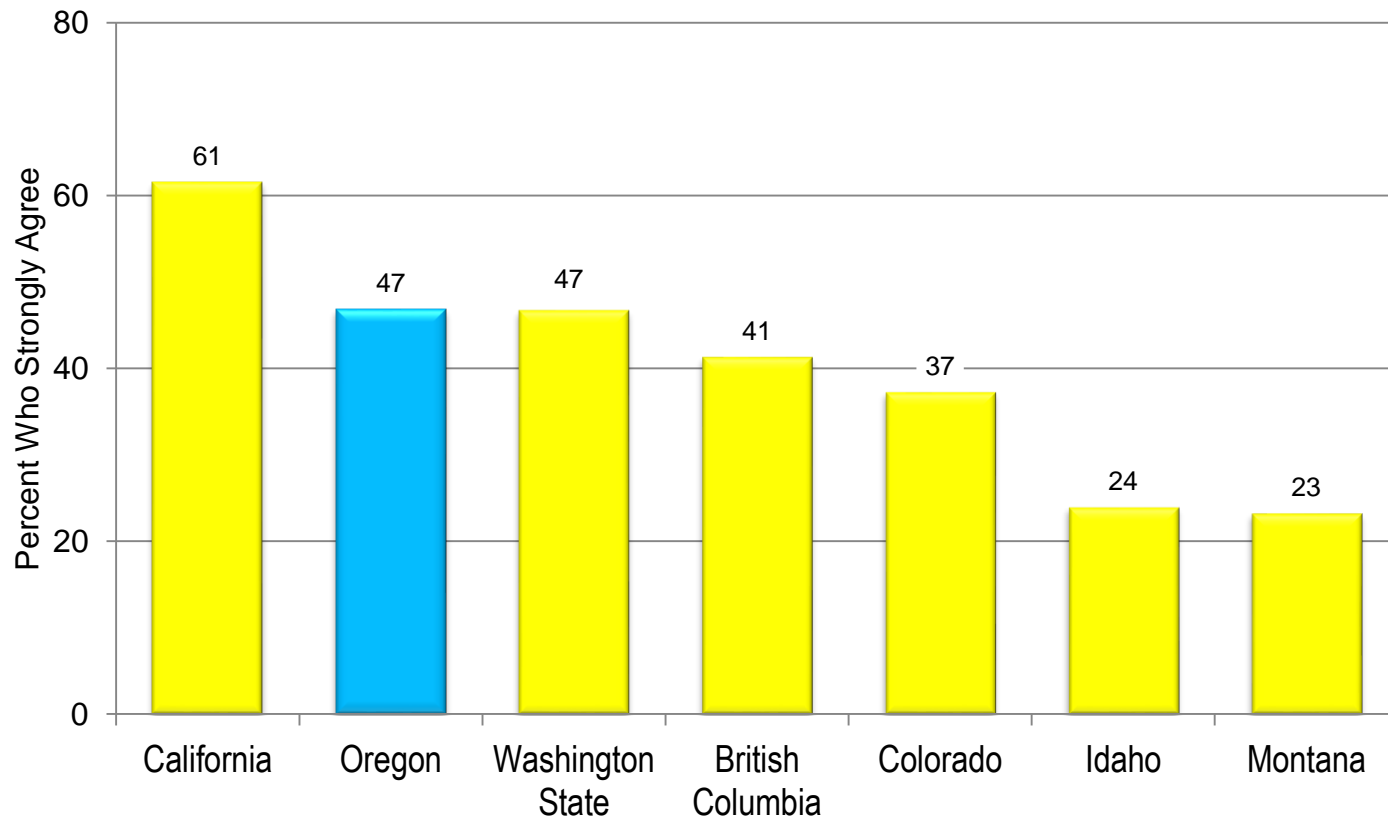
# Oregon's Image vs. Competition — Entertainment

Base: Residents of Oregon's Regional Advertising Markets



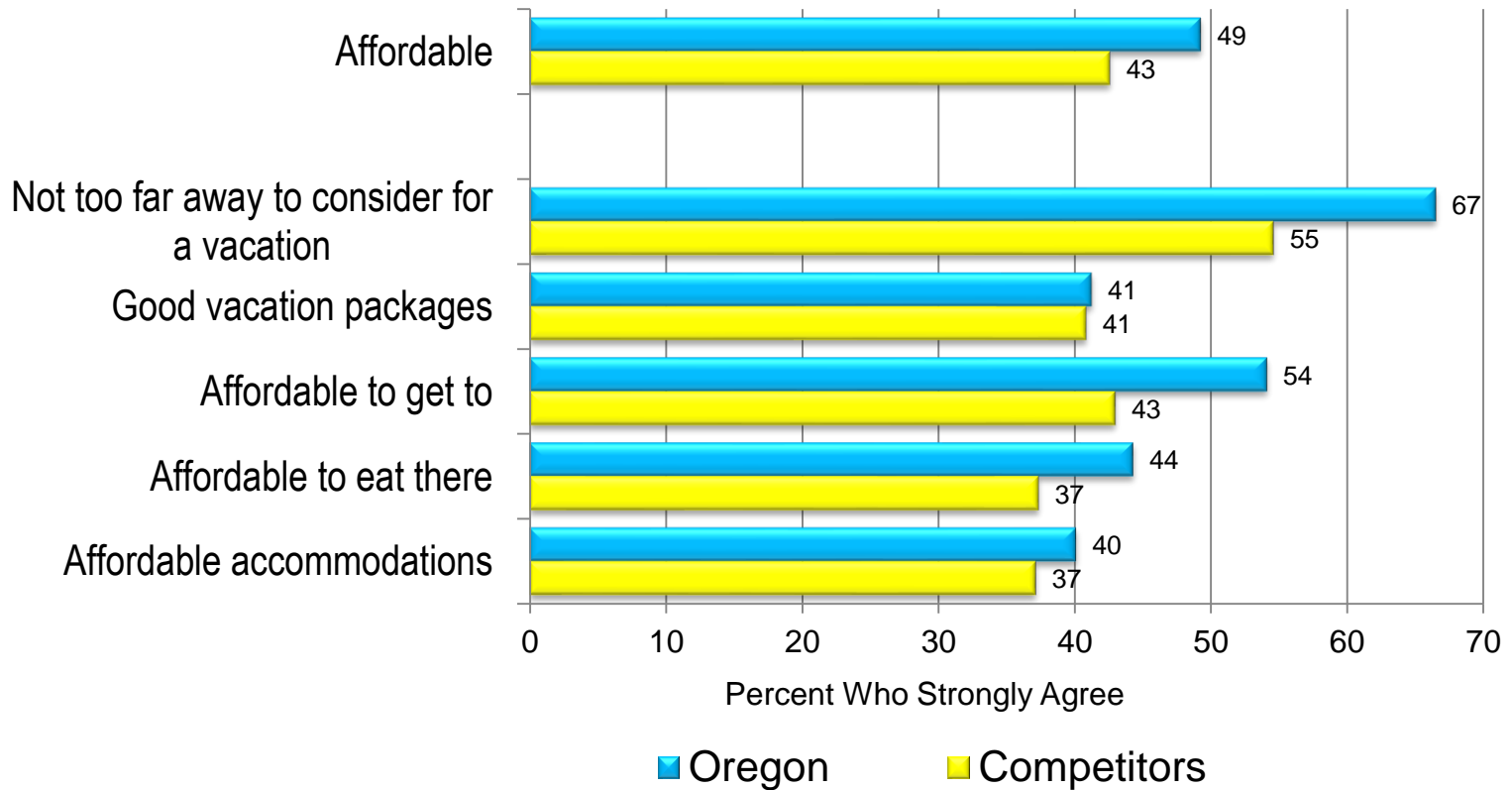
# Oregon's Image vs. Competition — Entertainment

Base: Residents of Oregon's Regional Advertising Markets



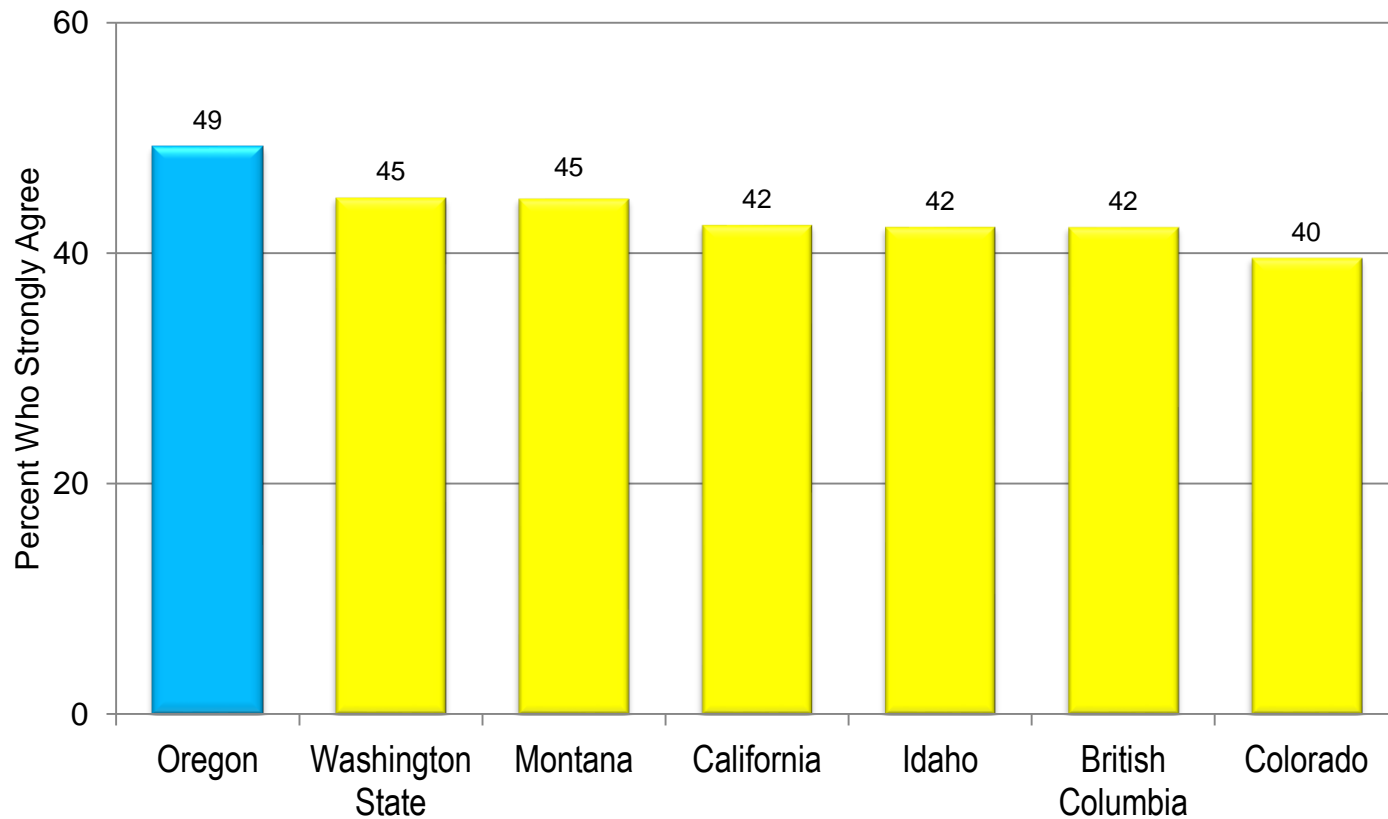
# Oregon's Image vs. Competition — Affordable

Base: Residents of Oregon's Regional Advertising Markets



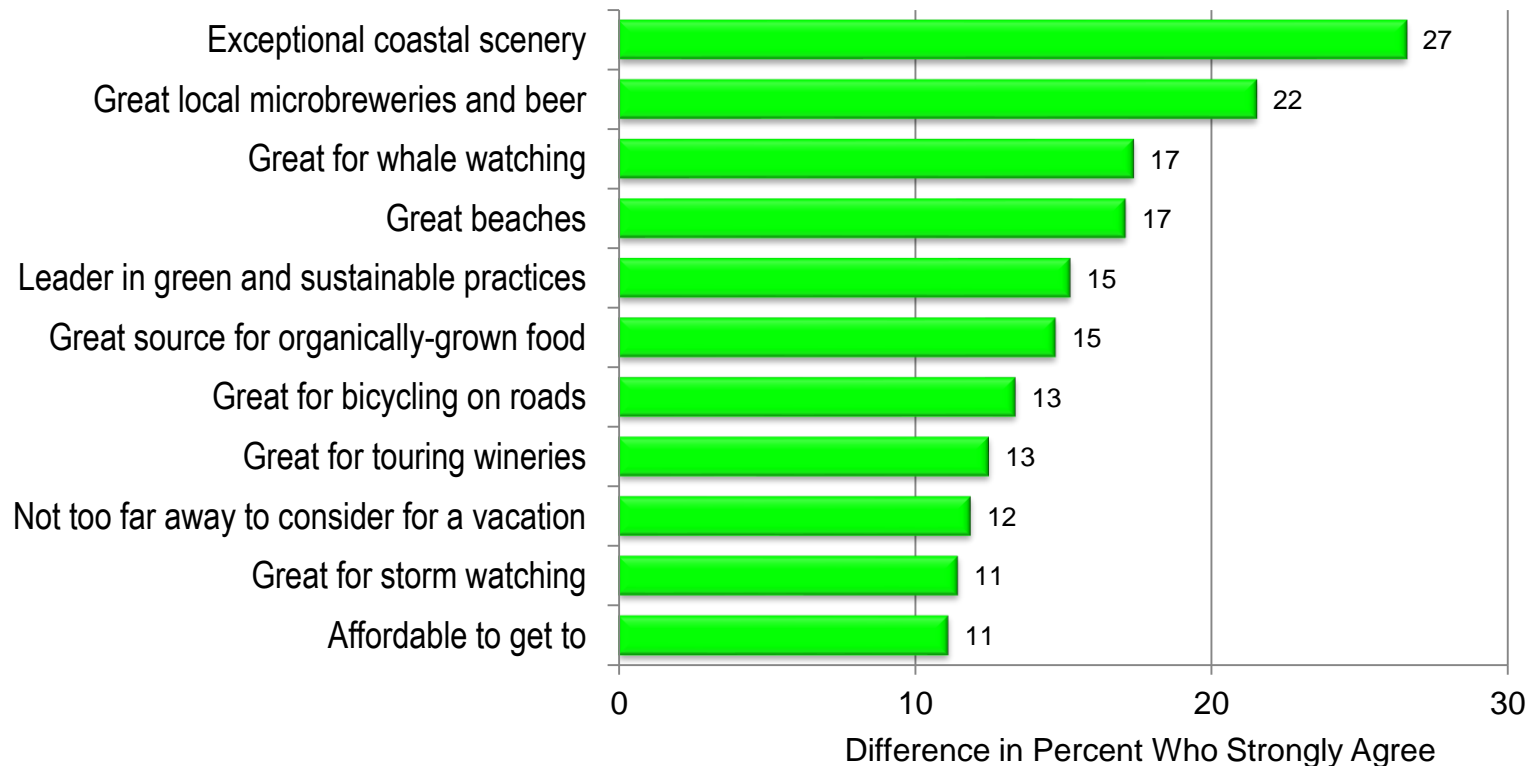
# Oregon's Image vs. Competition — Affordable

Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image Strengths vs. Competition

Base: Residents of Oregon's Regional Advertising Markets





# Oregon's Image Strengths vs. Competition (Cont'd)

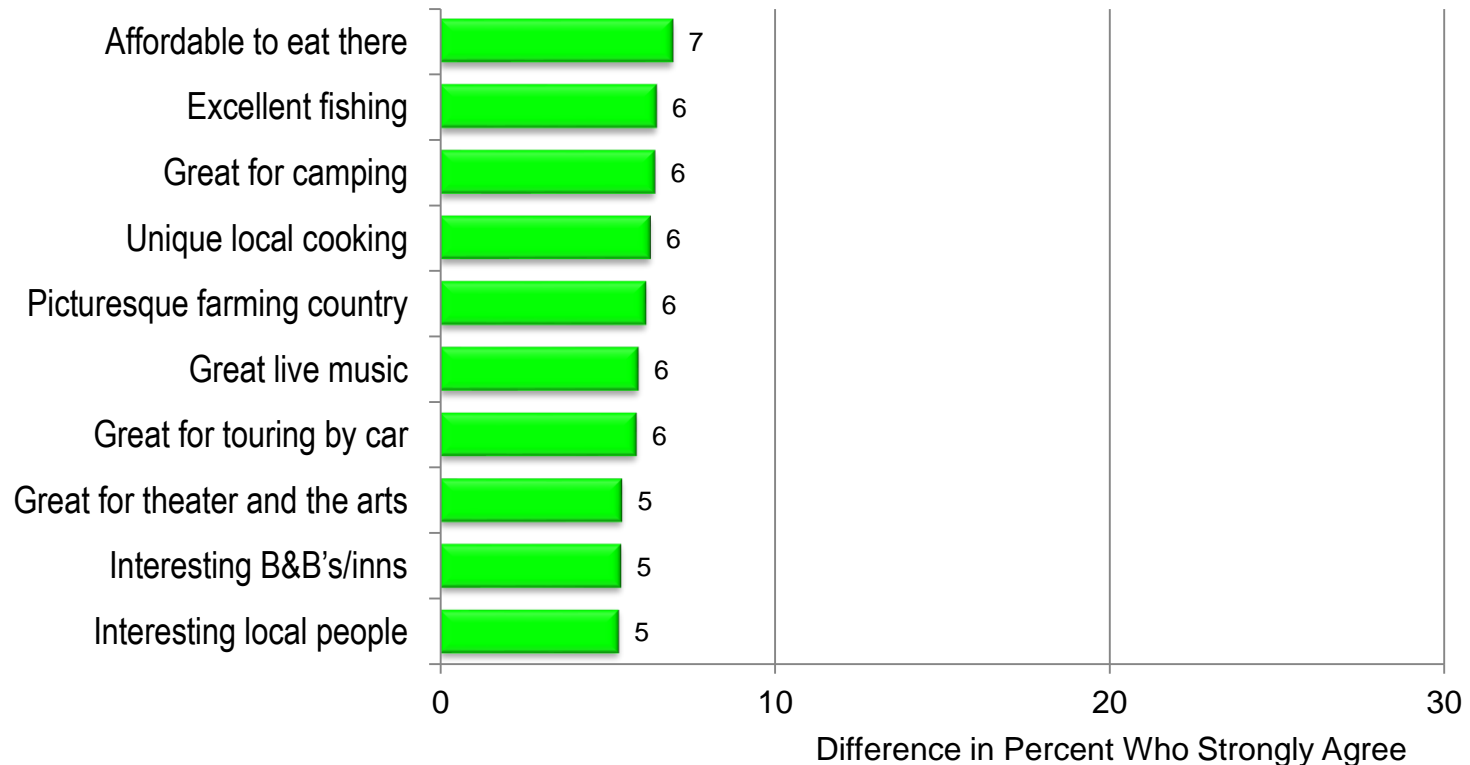
Base: Residents of Oregon's Regional Advertising Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

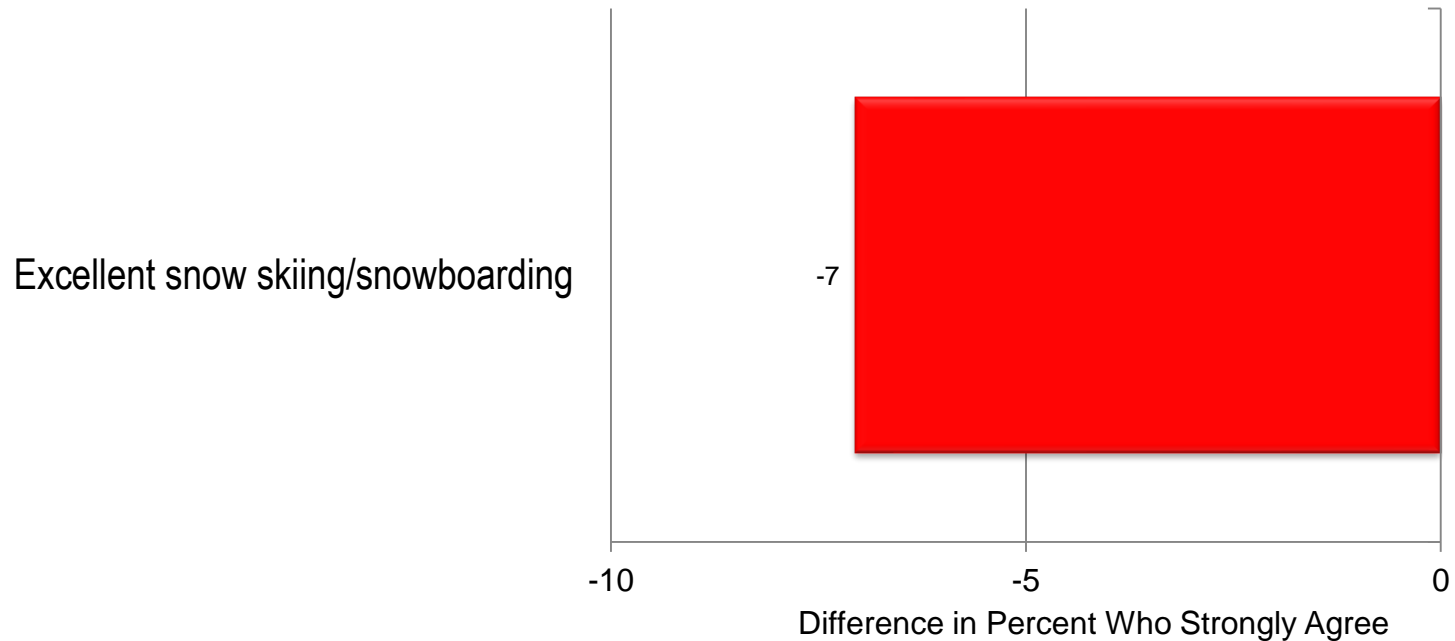
# Oregon's Image Strengths vs. Competition (Cont'd)

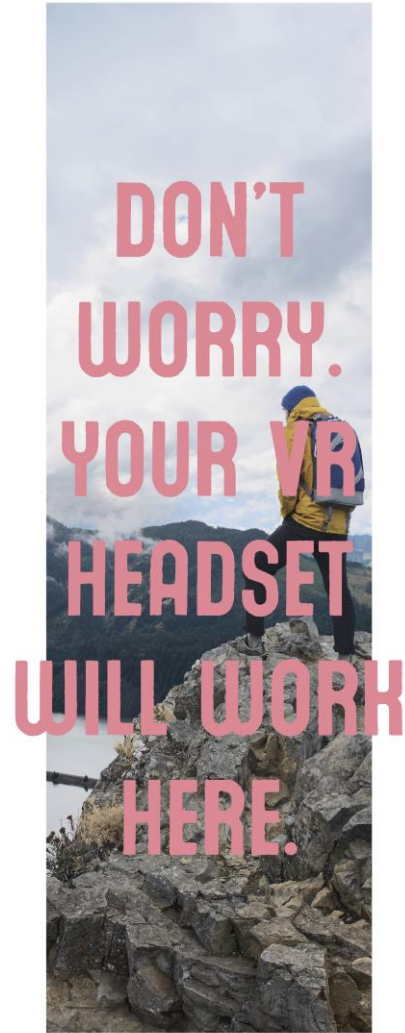
Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image Weaknesses vs. Competition

Base: Residents of Oregon's Regional Advertising Markets



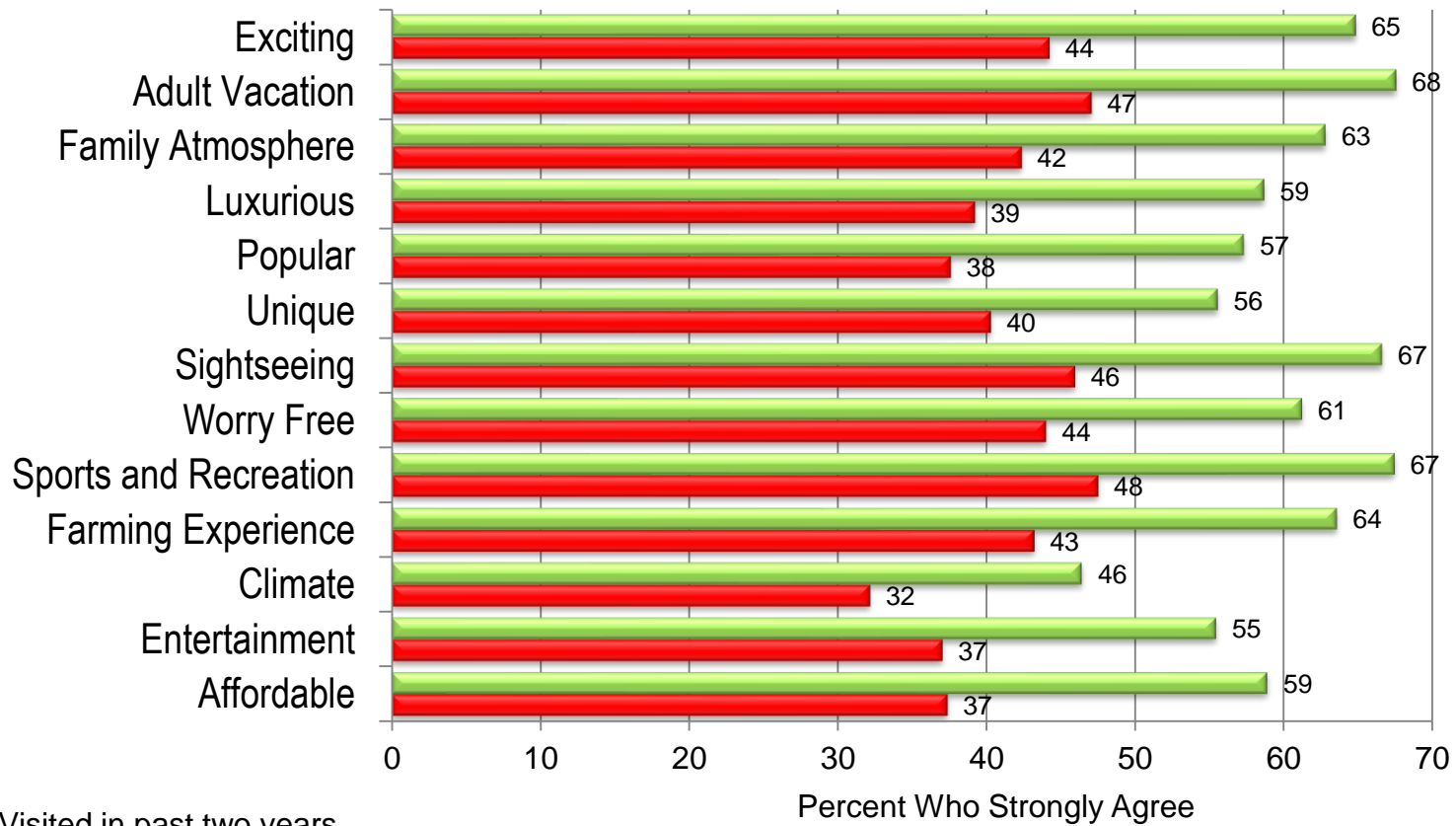


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## Oregon's Product Delivery

# Oregon's Product vs. Image

Base: Residents of Oregon's Regional Advertising Markets

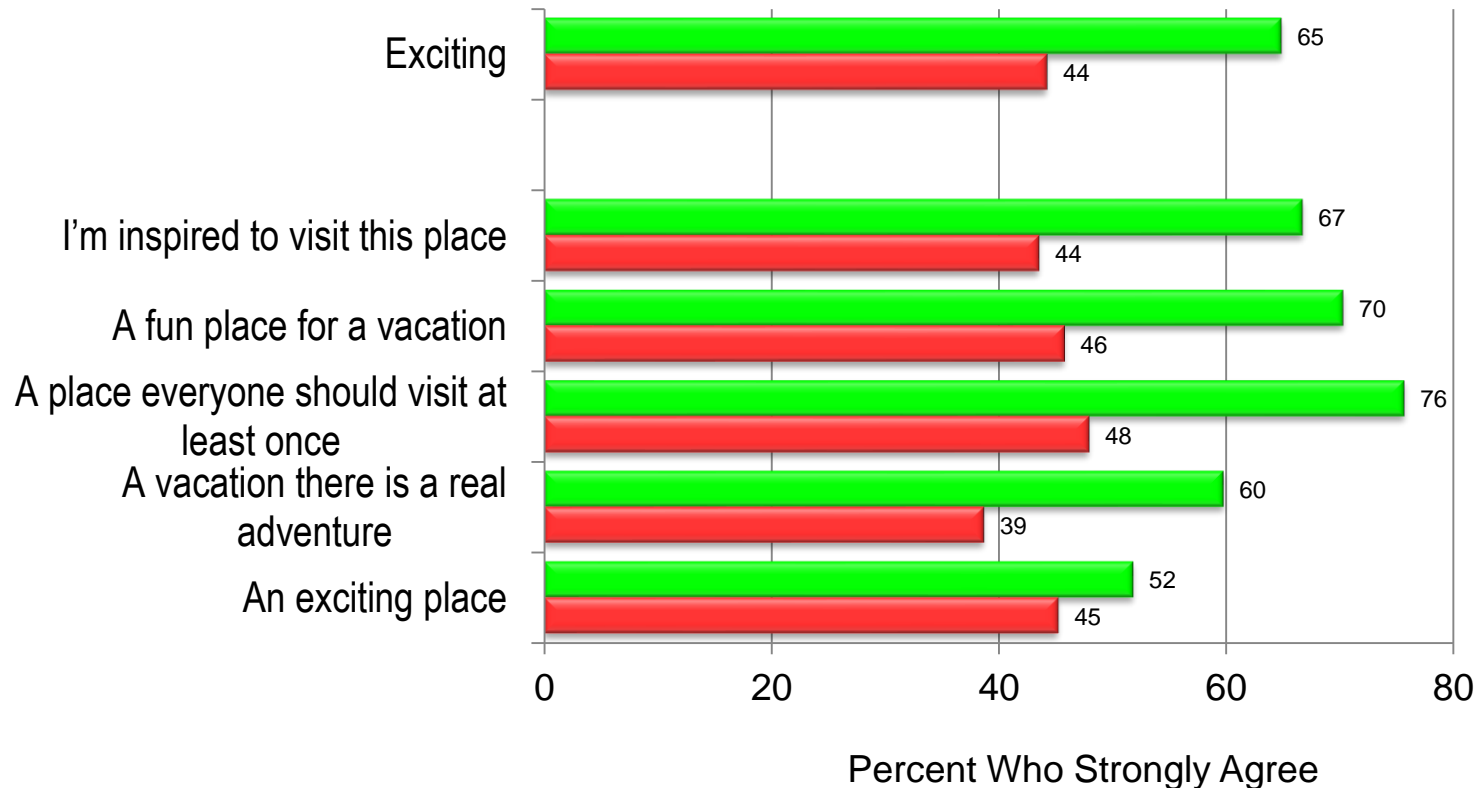


\* Visited in past two years

■ Recent Visitors\*    ■ Never Visited

# Oregon's Product Delivery vs. Image — Exciting

Base: Residents of Oregon's Regional Advertising Markets



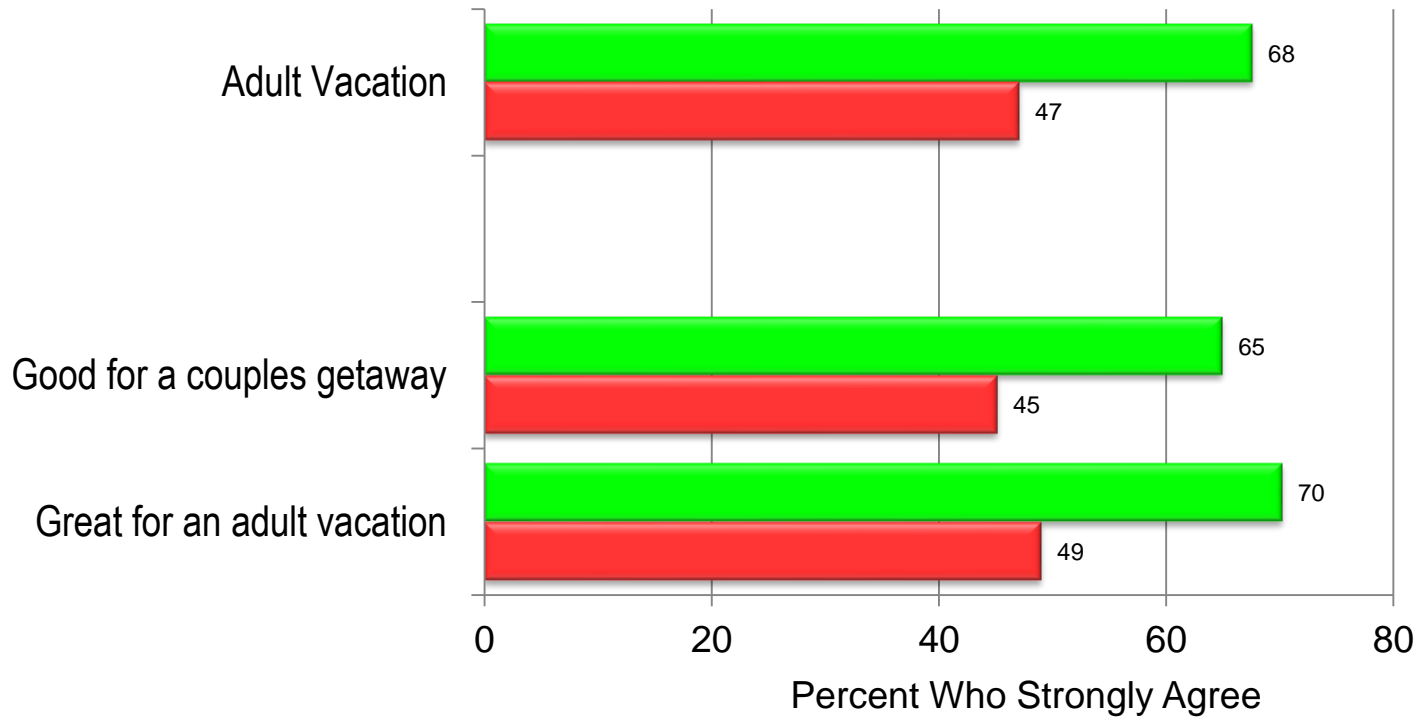
\* Visited in past two years

■ Recent Visitors\*

■ Never Visited

# Oregon's Product Delivery vs. Image — Adult Vacation

Base: Residents of Oregon's Regional Advertising Markets



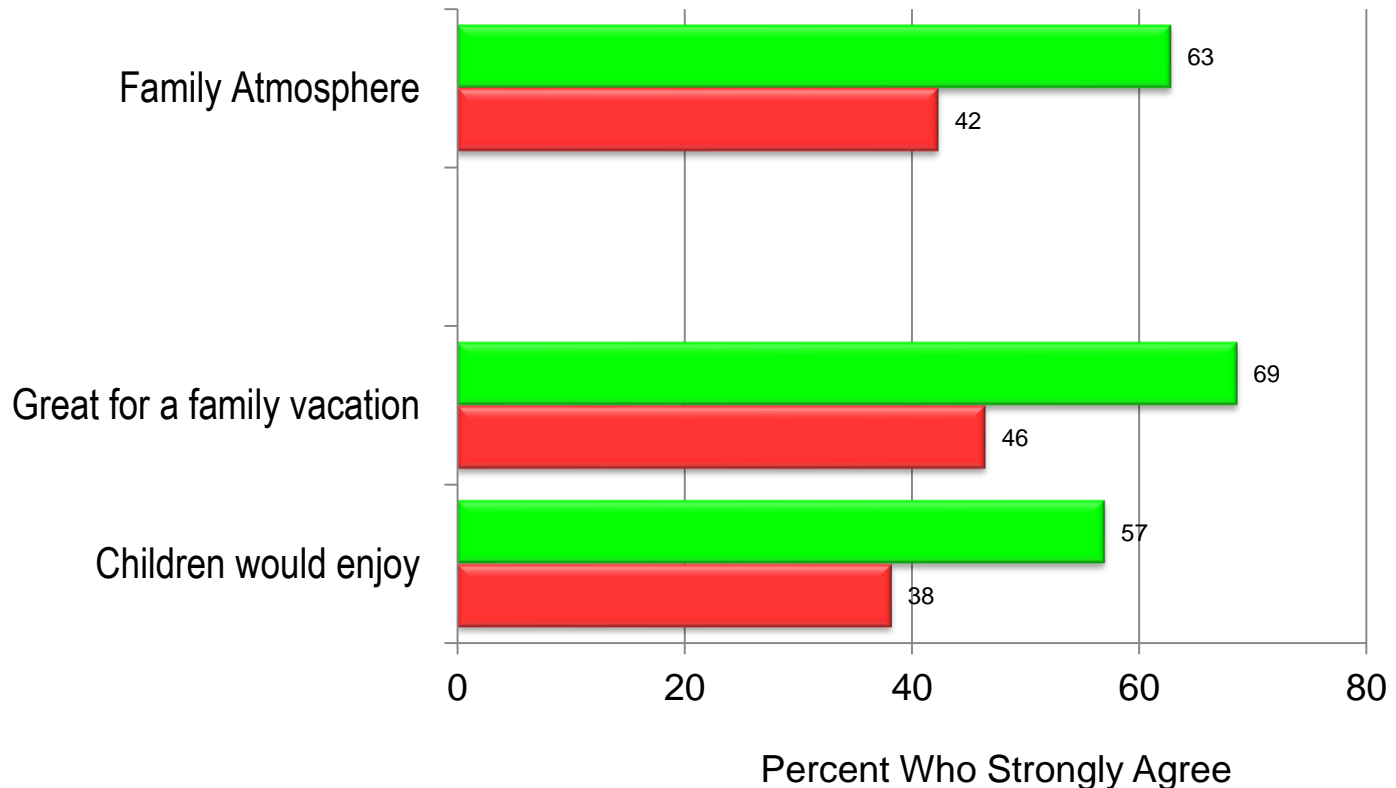
\* Visited in past two years

■ Recent Visitors\*

■ Never Visited

# Oregon's Product Delivery vs. Image — Family Atmosphere

Base: Residents of Oregon's Regional Advertising Markets



\* Visited in past two years

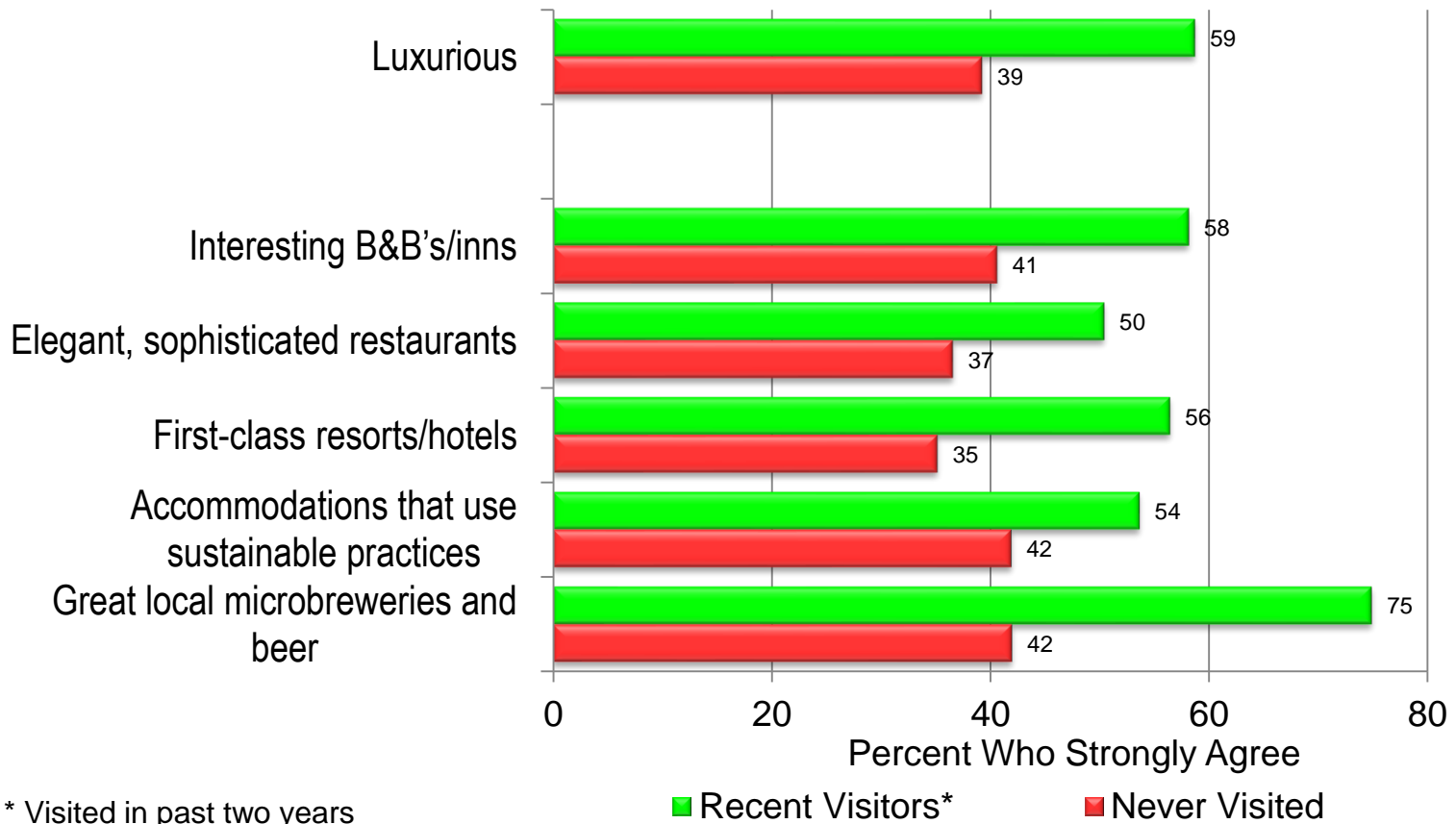
■ Recent Visitors\*

■ Never Visited



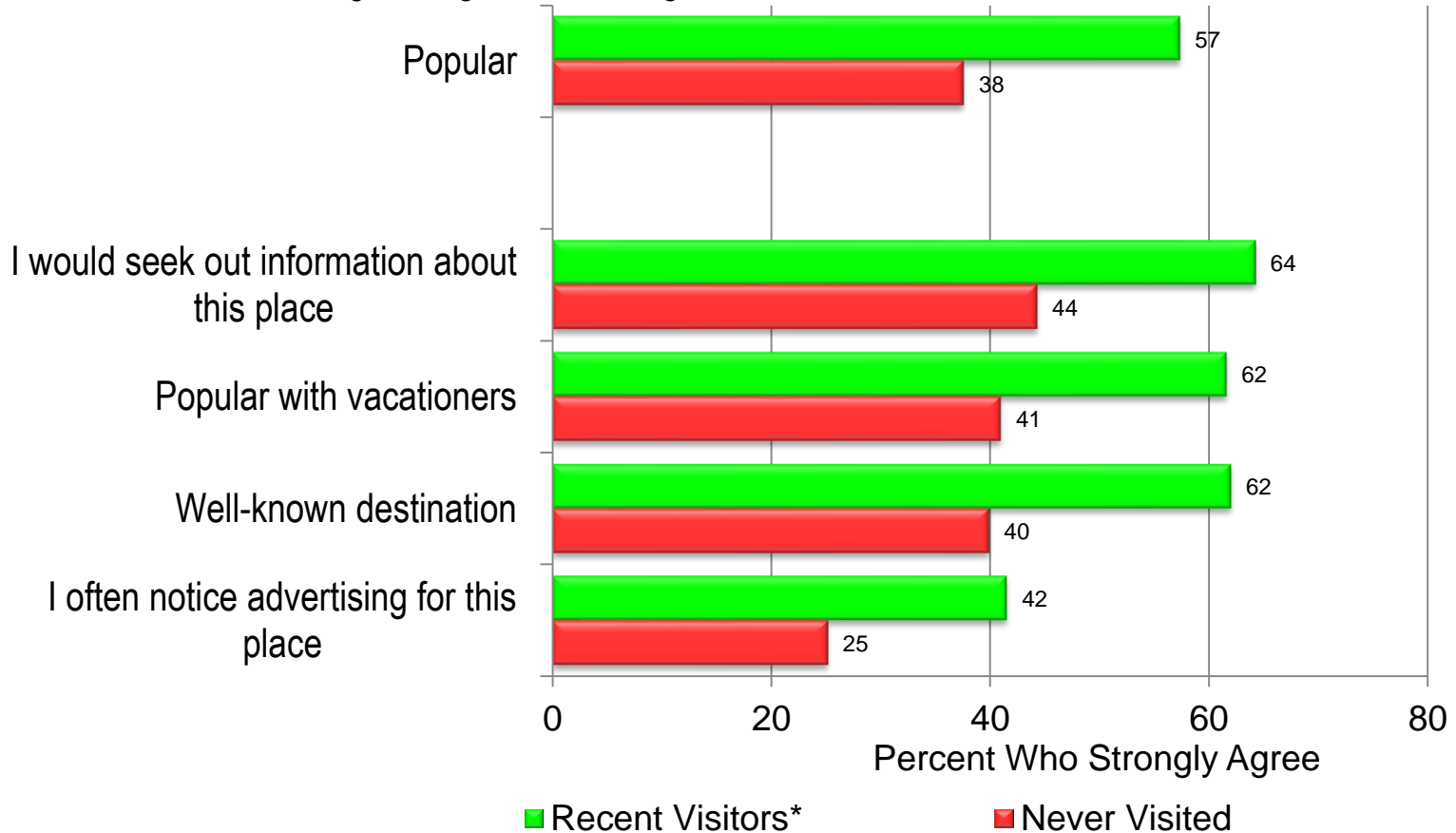
# Oregon's Product Delivery vs. Image — Luxurious

Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Product Delivery vs. Image — Popular

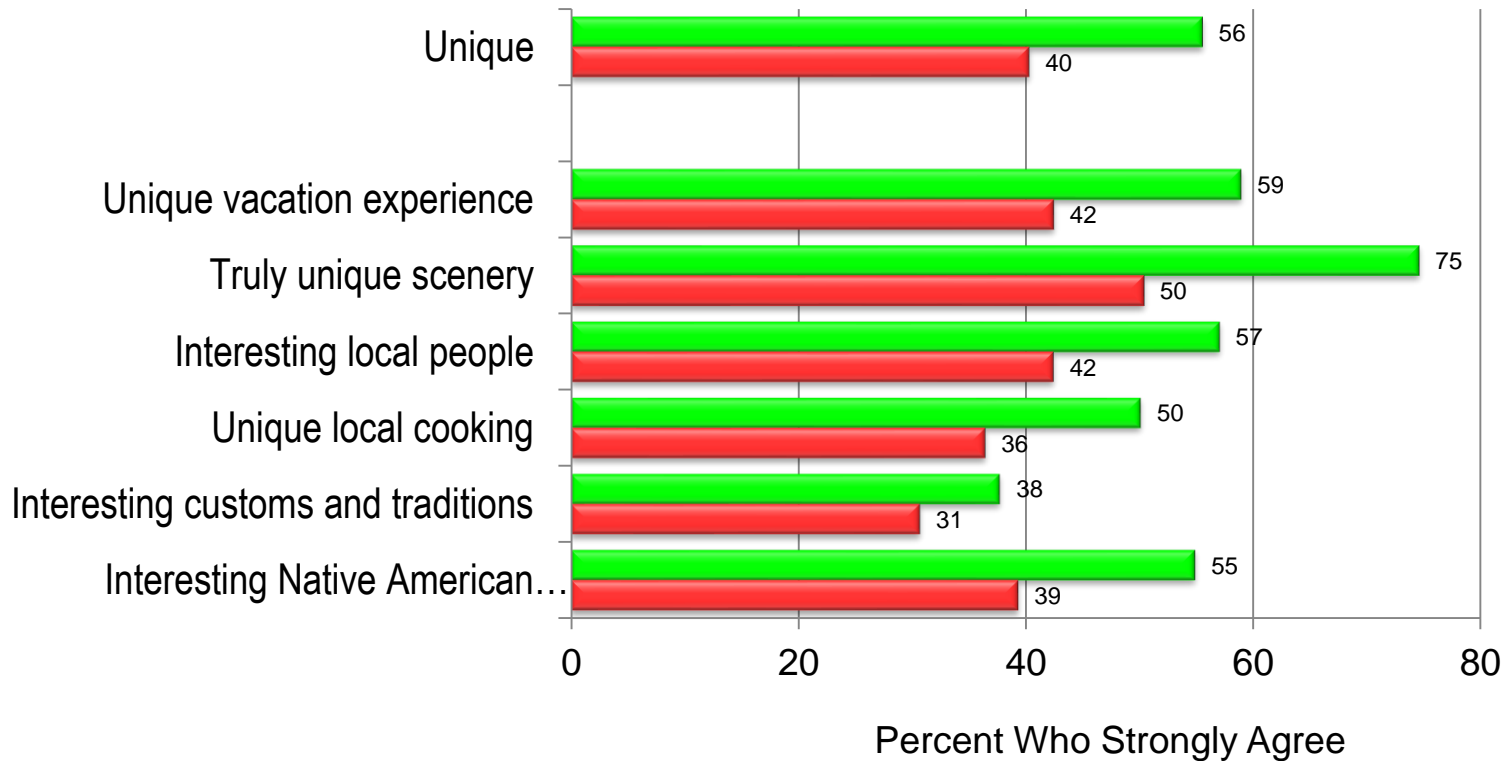
Base: Residents of Oregon's Regional Advertising Markets



\* Visited in past two years

# Oregon's Product Delivery vs. Image — Unique

Base: Residents of Oregon's Regional Advertising Markets



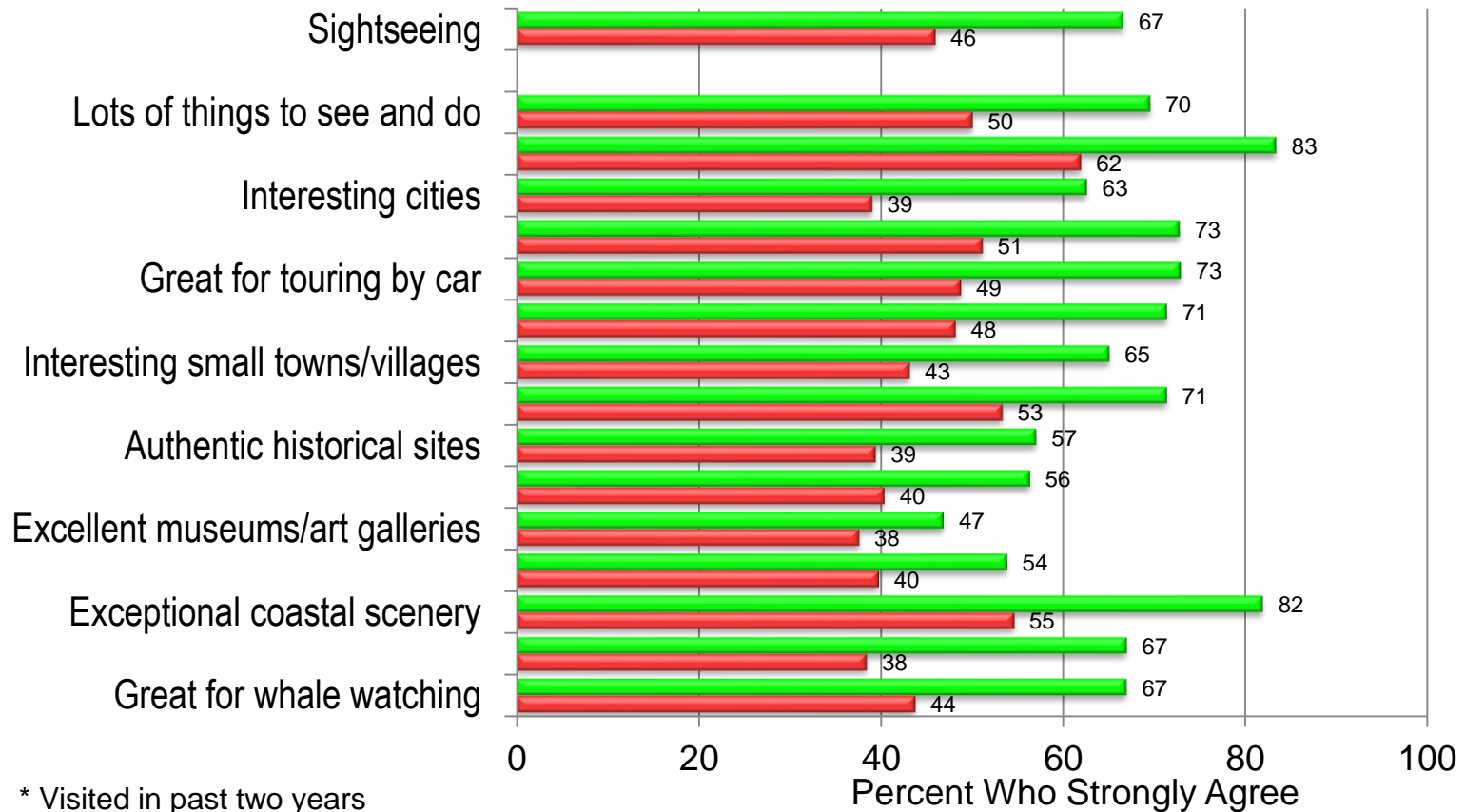
\* Visited in past two years

■ Recent Visitors\*

■ Never Visited

# Oregon's Product Delivery vs. Image — Sightseeing

Base: Residents of Oregon's Regional Advertising Markets

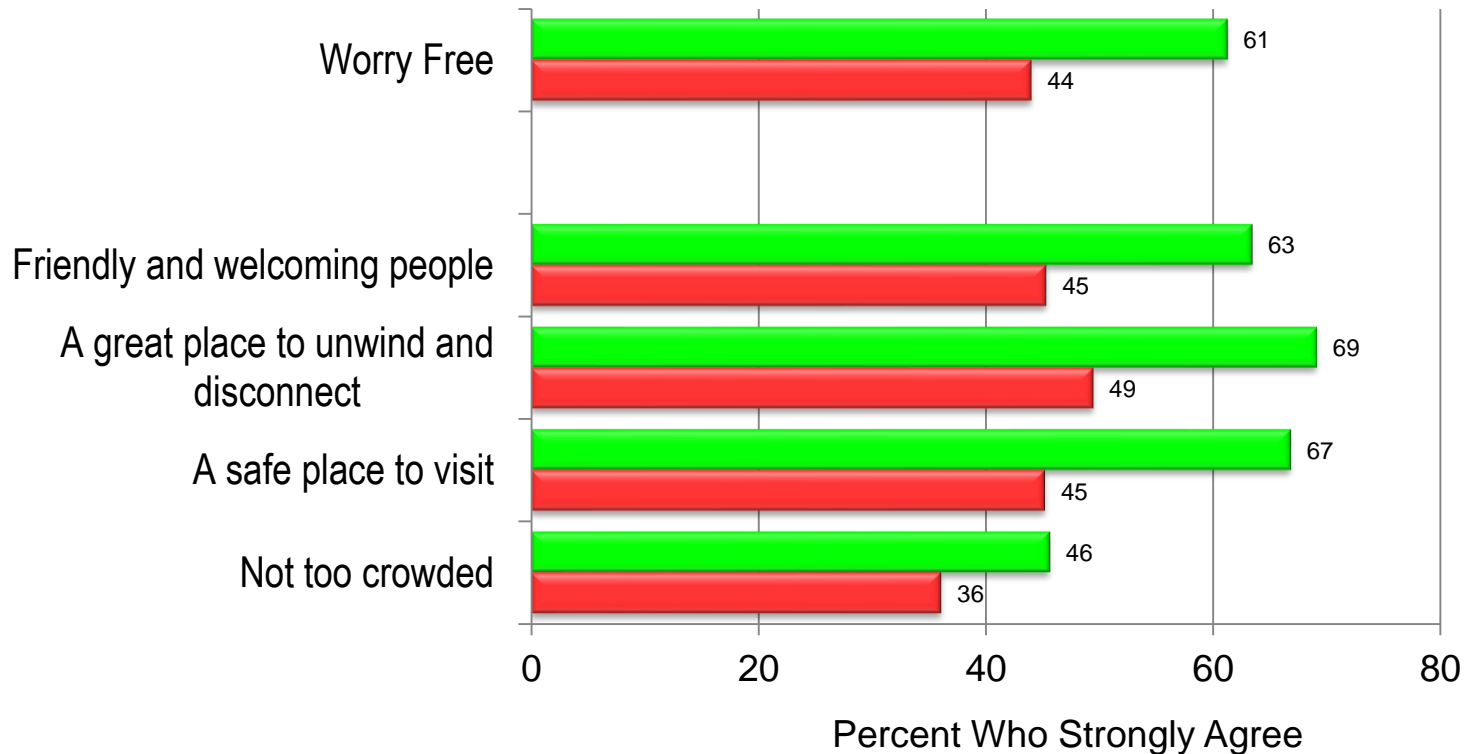


■ Recent Visitors\*

■ Never Visited

# Oregon's Product Delivery vs. Image — Worry-Free

Base: Residents of Oregon's Regional Advertising Markets



\* Visited in past two years

■ Recent Visitors\*

■ Never Visited

# Oregon's Product Delivery vs. Image — Sports and Recreation

Base: Residents of Oregon's Regional Advertising Markets



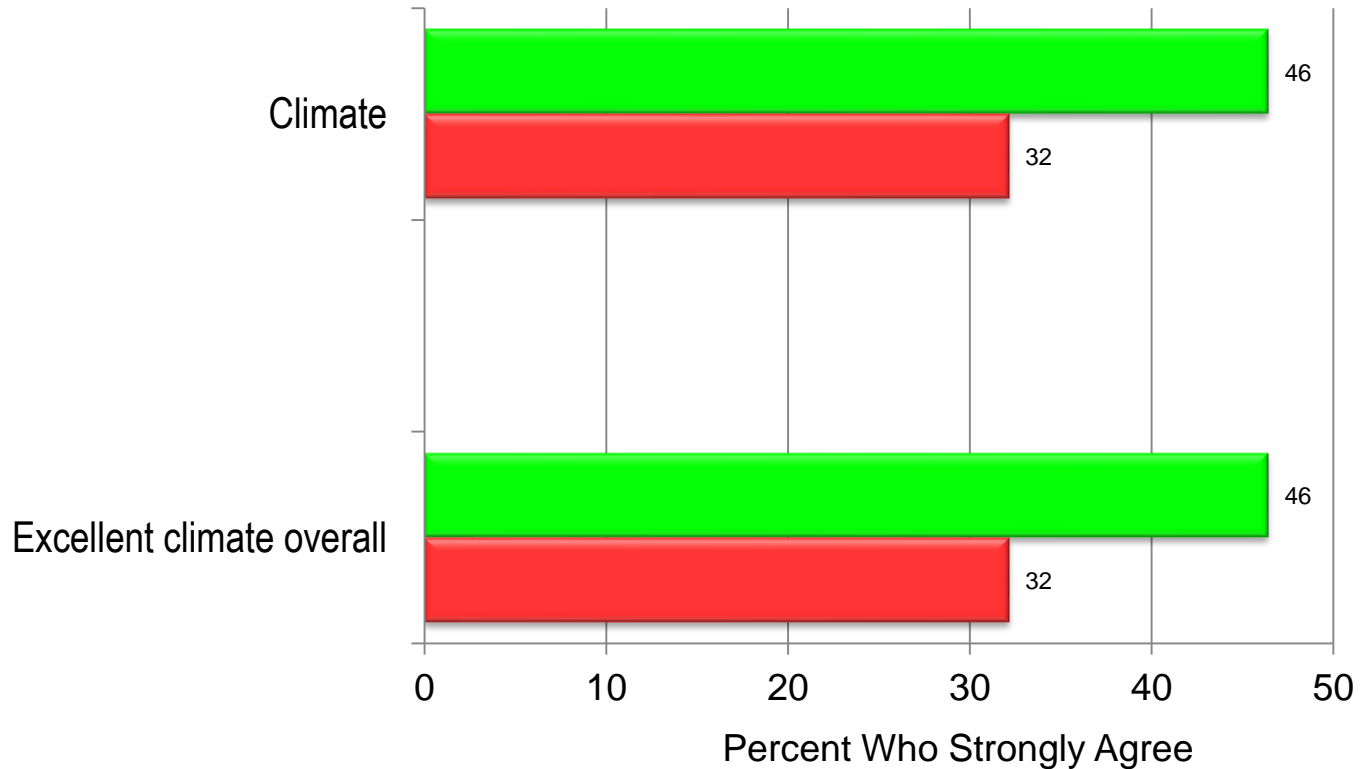
# Oregon's Product Delivery vs. Image — Farming Experience

Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Product Delivery vs. Image — Climate

Base: Residents of Oregon's Regional Advertising Markets



\* Visited in past two years

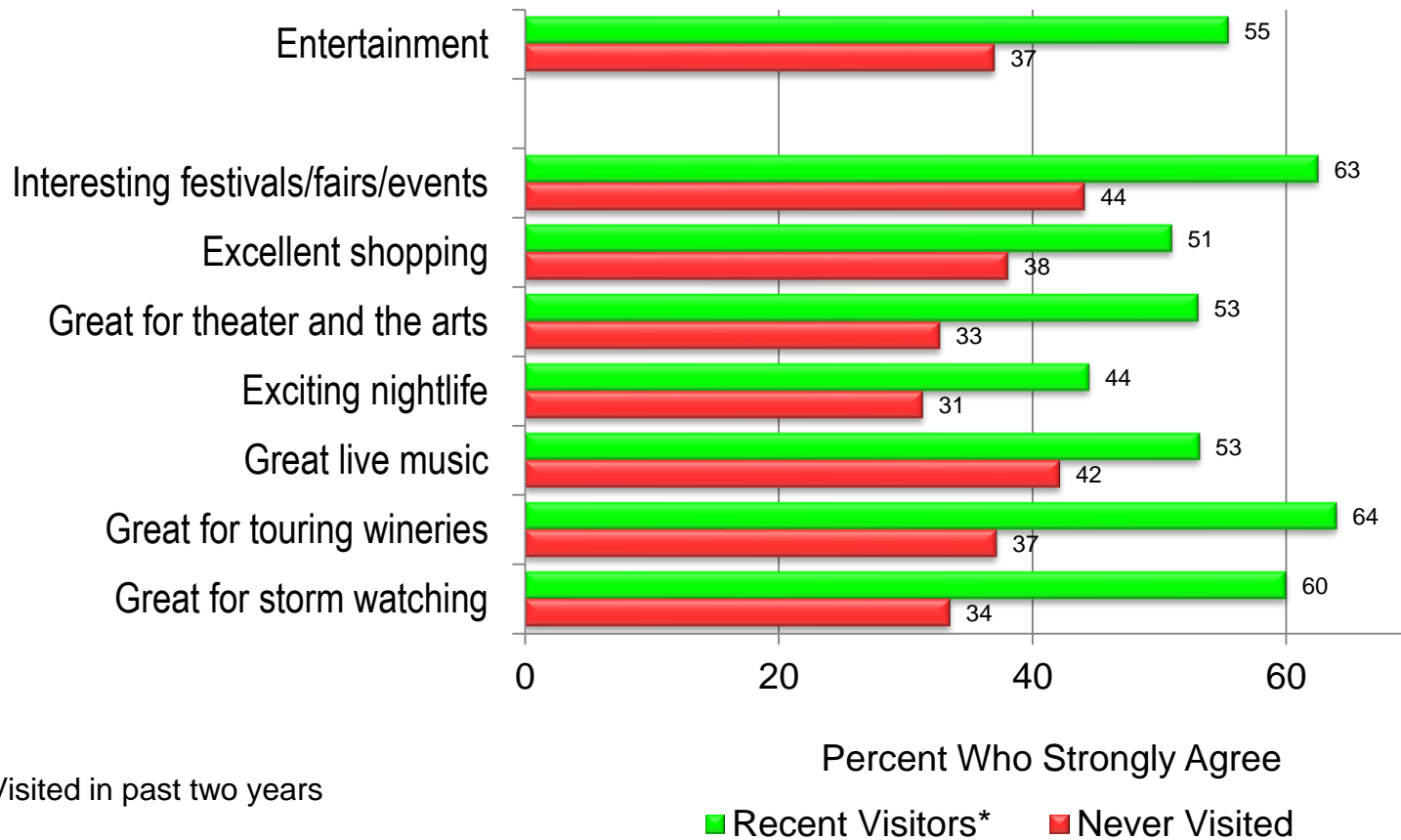
■ Recent Visitors\*

■ Never Visited



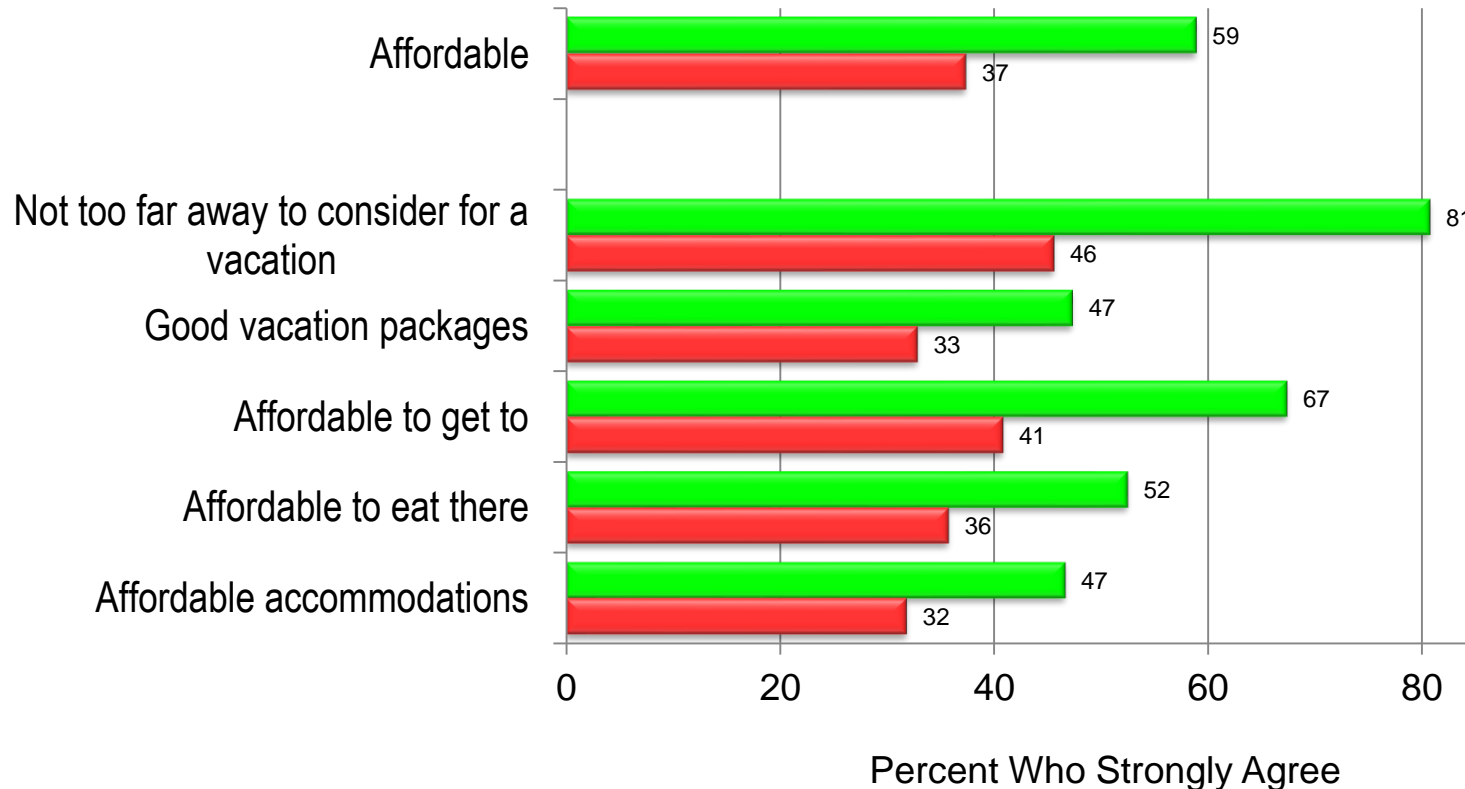
# Oregon's Product Delivery vs. Image — Entertainment

Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Product Delivery vs. Image — Affordable

Base: Residents of Oregon's Regional Advertising Markets

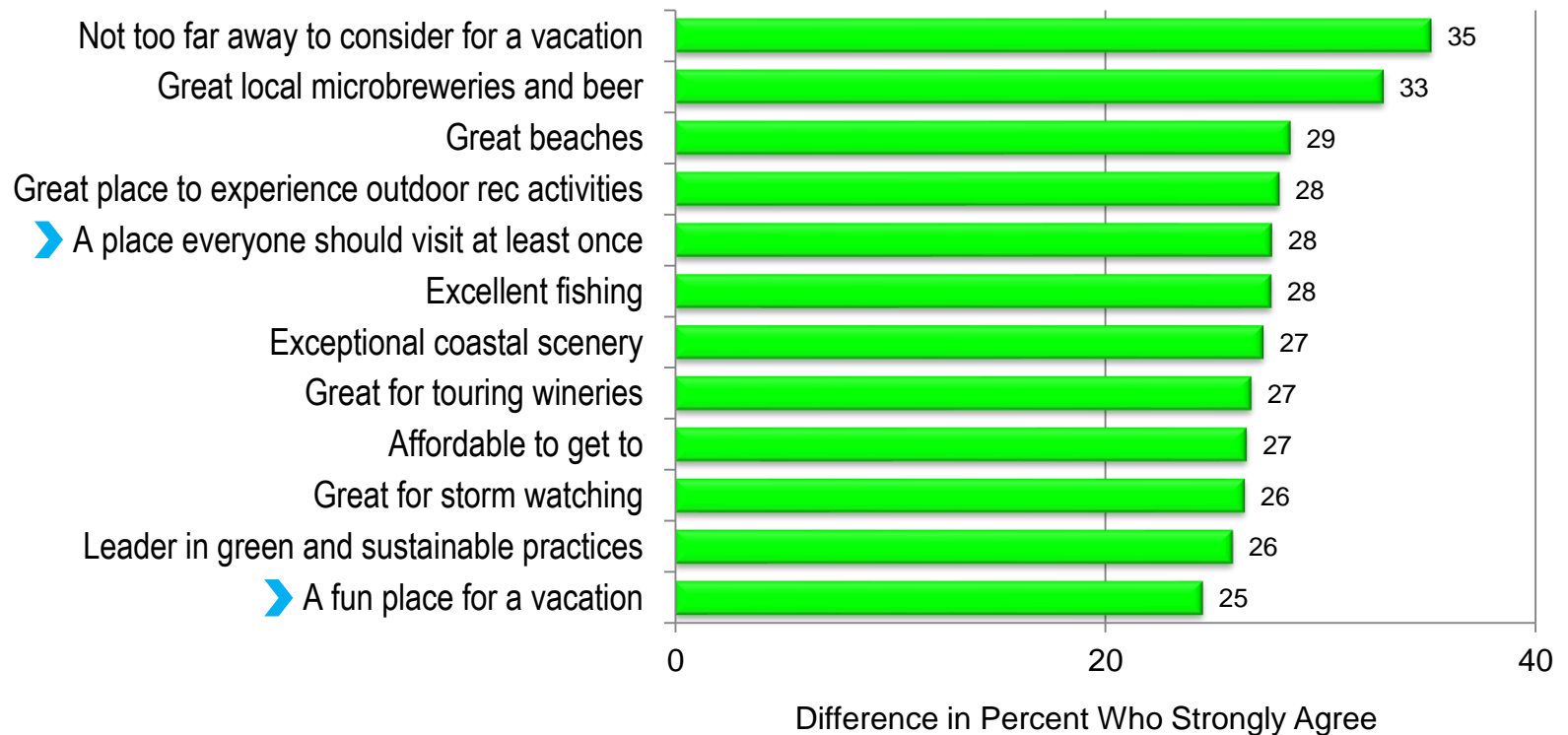


\* Visited in past two years

■ Recent Visitors\* ■ Never Visited

# Top Product Strengths vs. Image

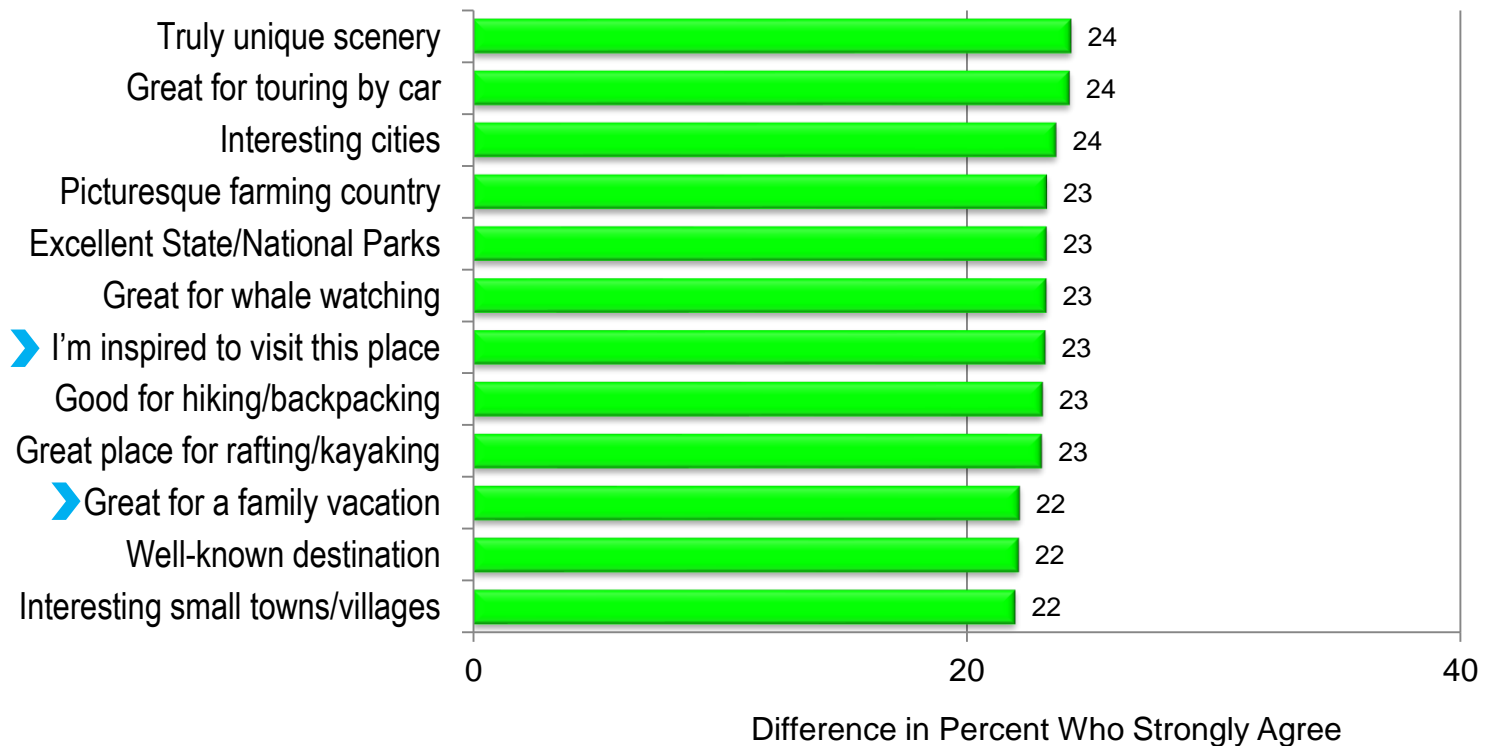
Base: Residents of Oregon's Regional Advertising Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

# Top Product Strengths vs. Image (Cont'd)

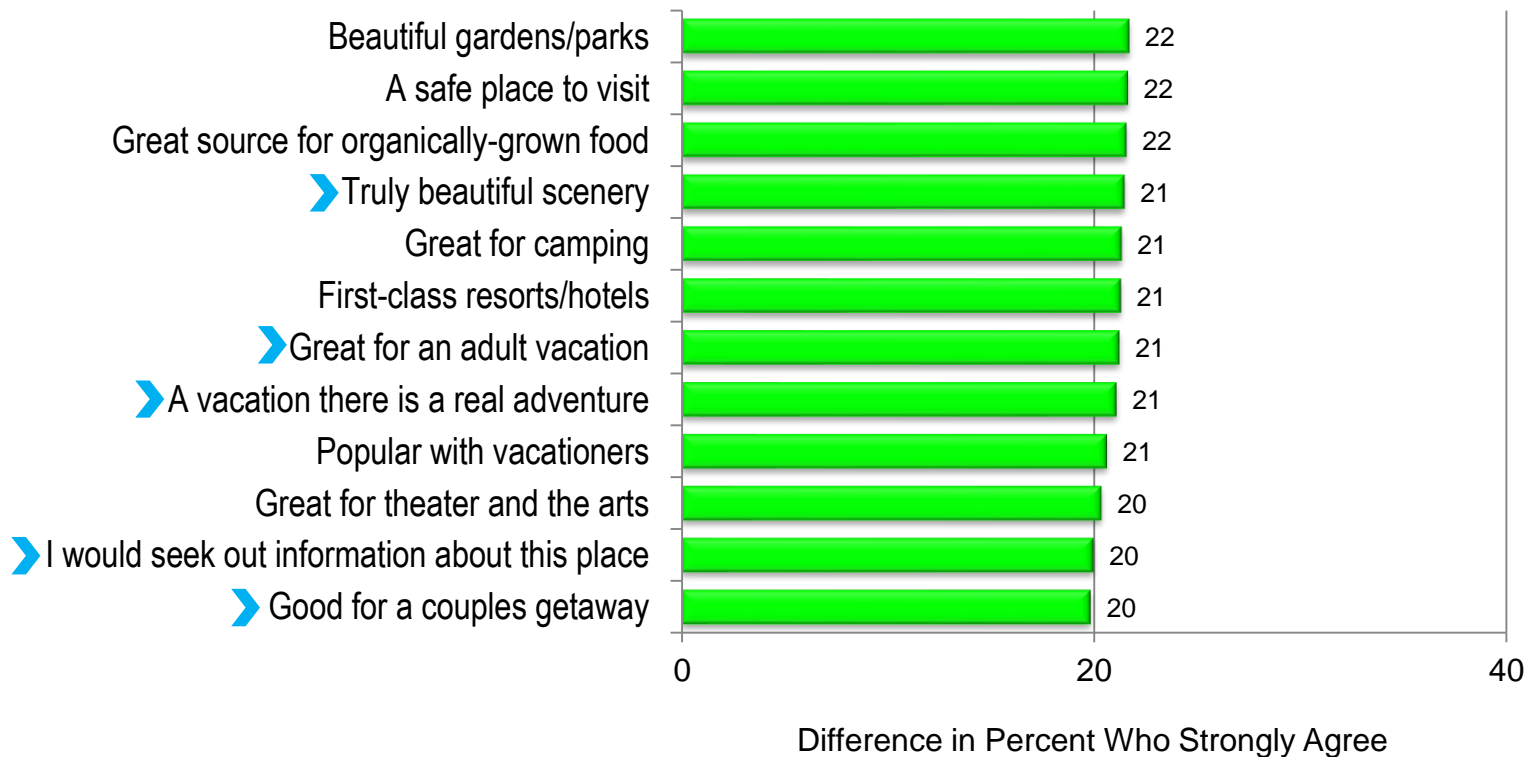
Base: Residents of Oregon's Regional Advertising Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

# Top Product Strengths vs. Image (Cont'd)

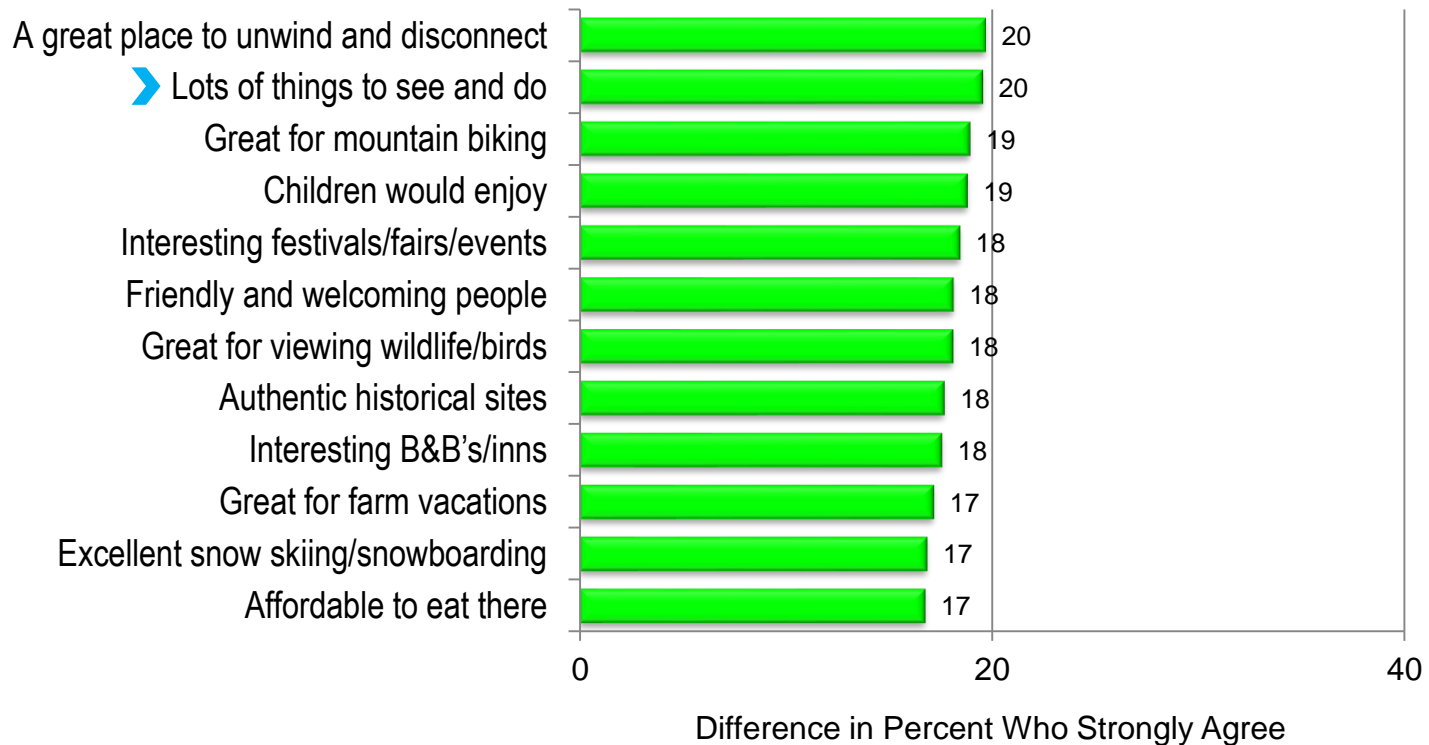
Base: Residents of Oregon's Regional Advertising Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

# Top Product Strengths vs. Image (Cont'd)

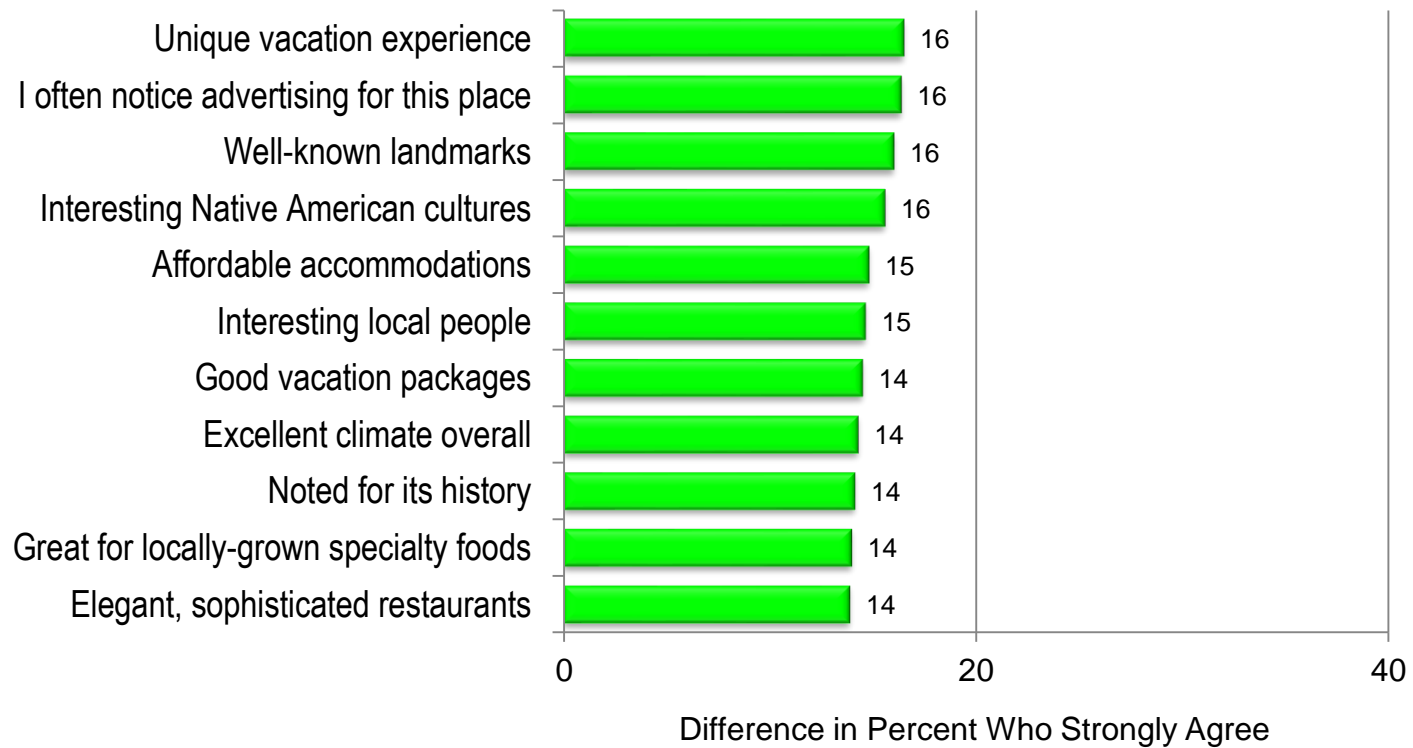
Base: Residents of Oregon's Regional Advertising Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

# Top Product Strengths vs. Image (Cont'd)

Base: Residents of Oregon's Regional Advertising Markets



# Top Product Strengths vs. Image (Cont'd)

Base: Residents of Oregon's Regional Advertising Markets





# Top Product Weaknesses vs. Image

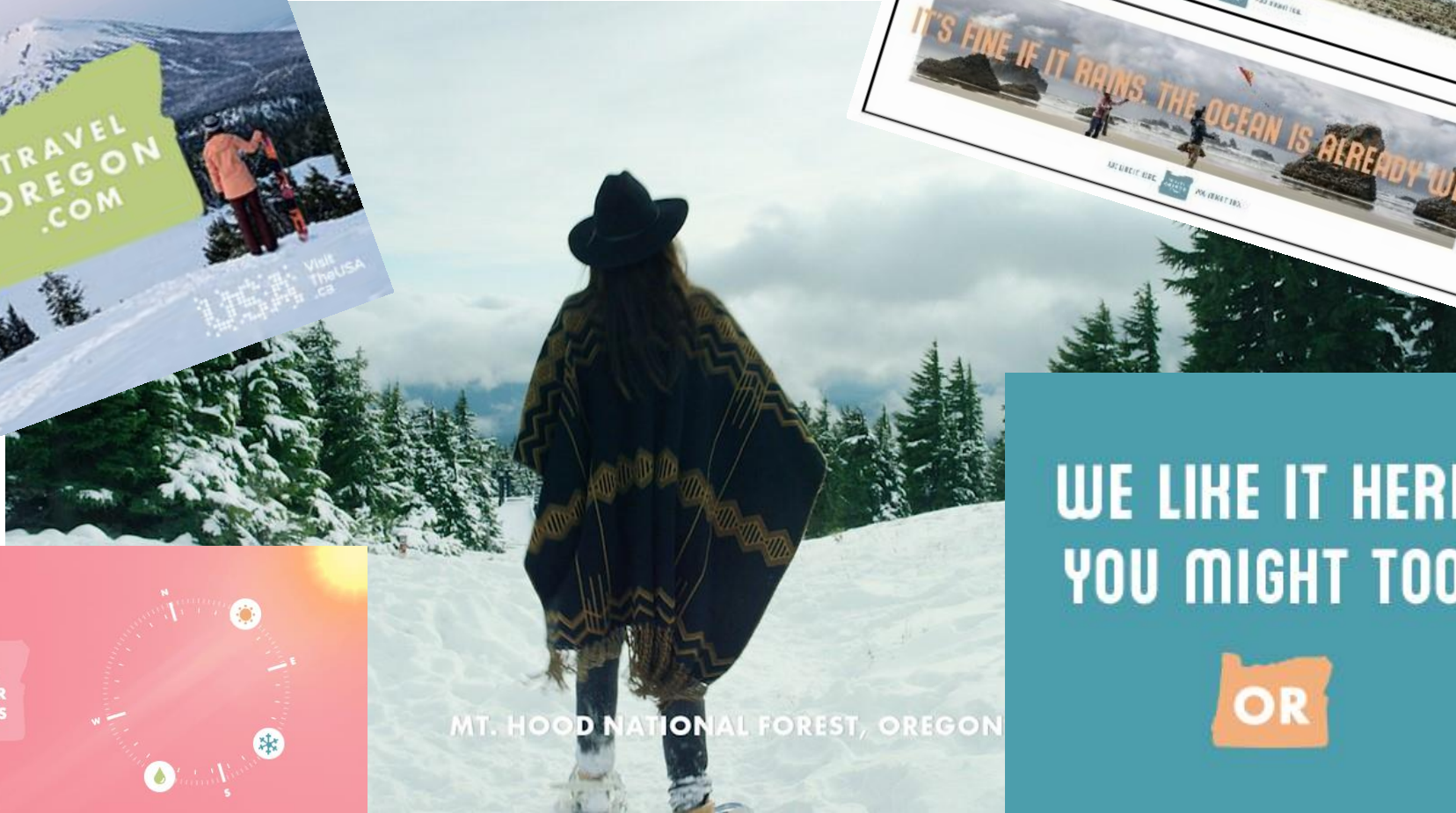
Base: Residents of Oregon's Regional Advertising Markets

**THERE WERE NO SIGNIFICANT  
PERCEIVED PRODUCT  
WEAKNESSES VS. IMAGE**

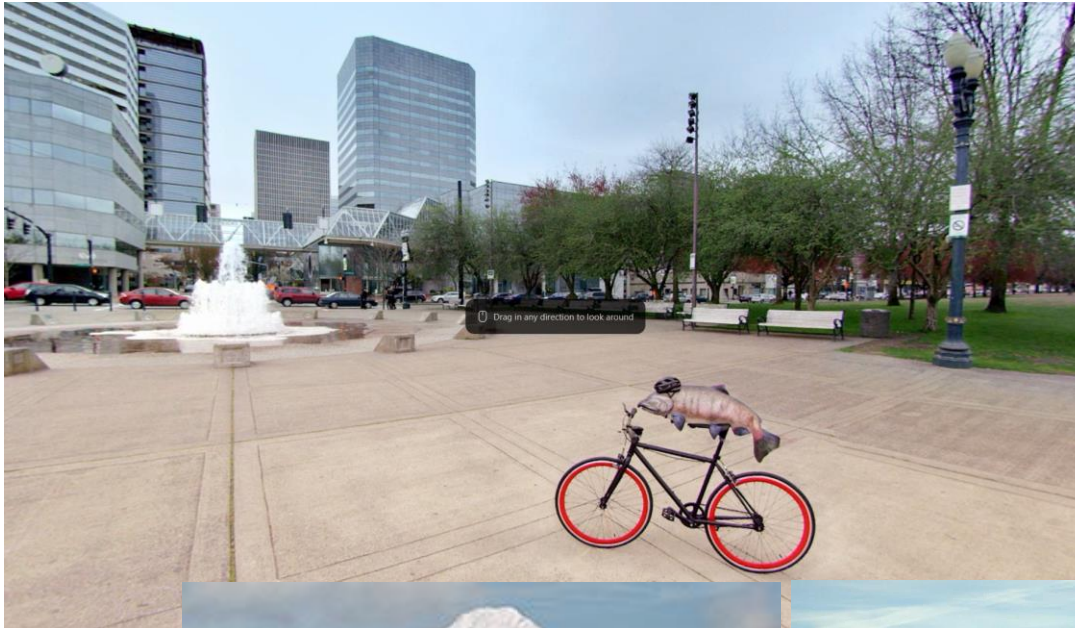



Creative


# Fall 2016 Ads





# Spring 2017 Ads




EXPERIENCE OREGON WITH A ROBOT FISH. 

SEE OREGON IN 360° WITH THIS ROBOT FISH. 

SEE OREGON IN 360° WITH THIS ROBOT FISH. 

OREGON. 360° VIDEOS. ROBOT FISH. CLICK NOW. 





# Impact of Advertising on Image

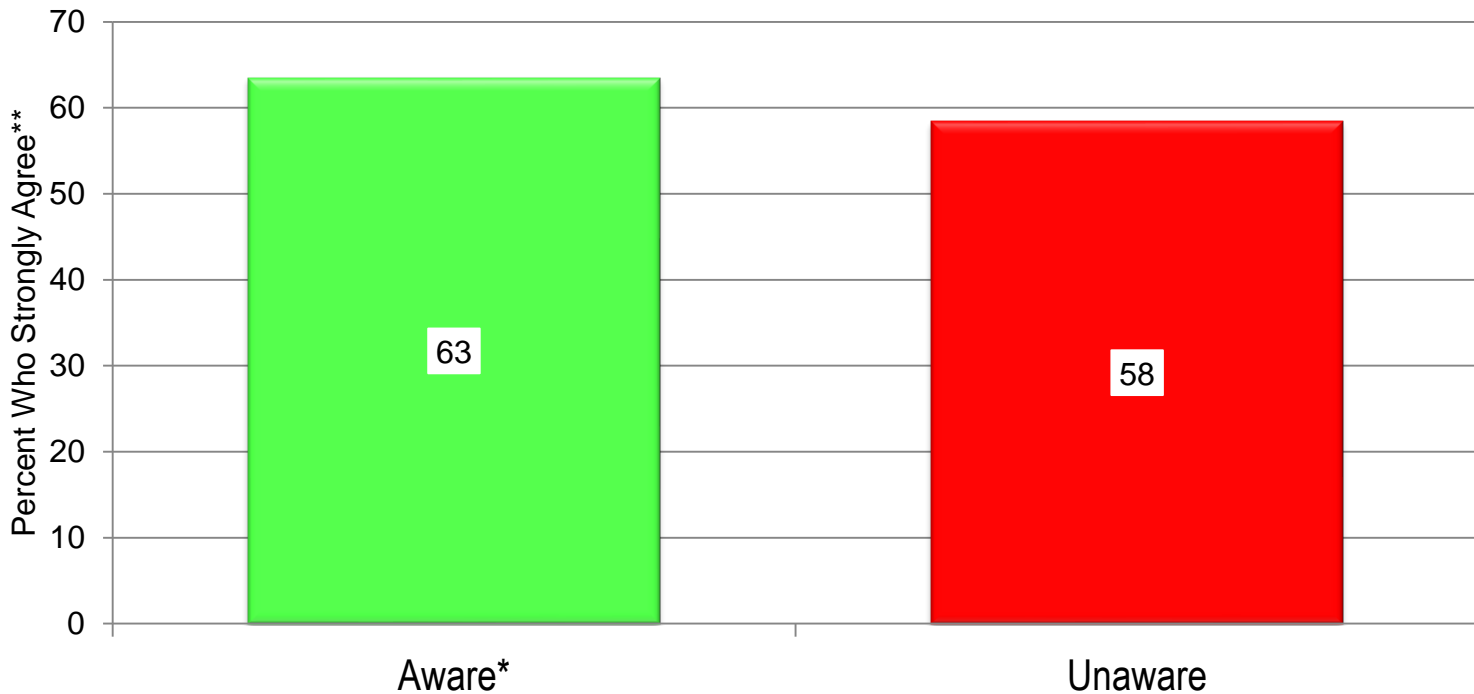
# Advertising Impact on Image

- The campaign had a positive impact on travelers' perceptions of Oregon:
  - People exposed to the campaign gave Oregon a statistically significant higher rating score than those unfamiliar with the campaign for the key overall statement "Oregon is a place I would really enjoy visiting". It must be said, however, that Oregon ranks high as a place people would enjoy visiting even if they are unaware of the advertising.
  - For the more detailed attributes, we find that the campaign did a good job of improving people's perceptions of Oregon for every image dimension evaluated.

# Advertising Impact on Image (Cont'd)

- The advertising had greatest impact on perceptions related to:
  - Popularity as a destination.
  - Entertainment.
  - Sports & Recreation, particularly rafting/kayaking
  - Farming Experience, particularly farm vacations.
  - Affordability.
  - Uniqueness.
  - Exciting
- Of these variables, being thought of as an “exciting” destination is the most important motivator for travelers at the “wish-list” stage of selecting destinations for future trips, i.e., when destinations are just ideas and no actual plans have been made.

# Advertising Impact on Oregon's Image as "A Place I'd Really Enjoy Visiting"



\*Saw at least one ad.

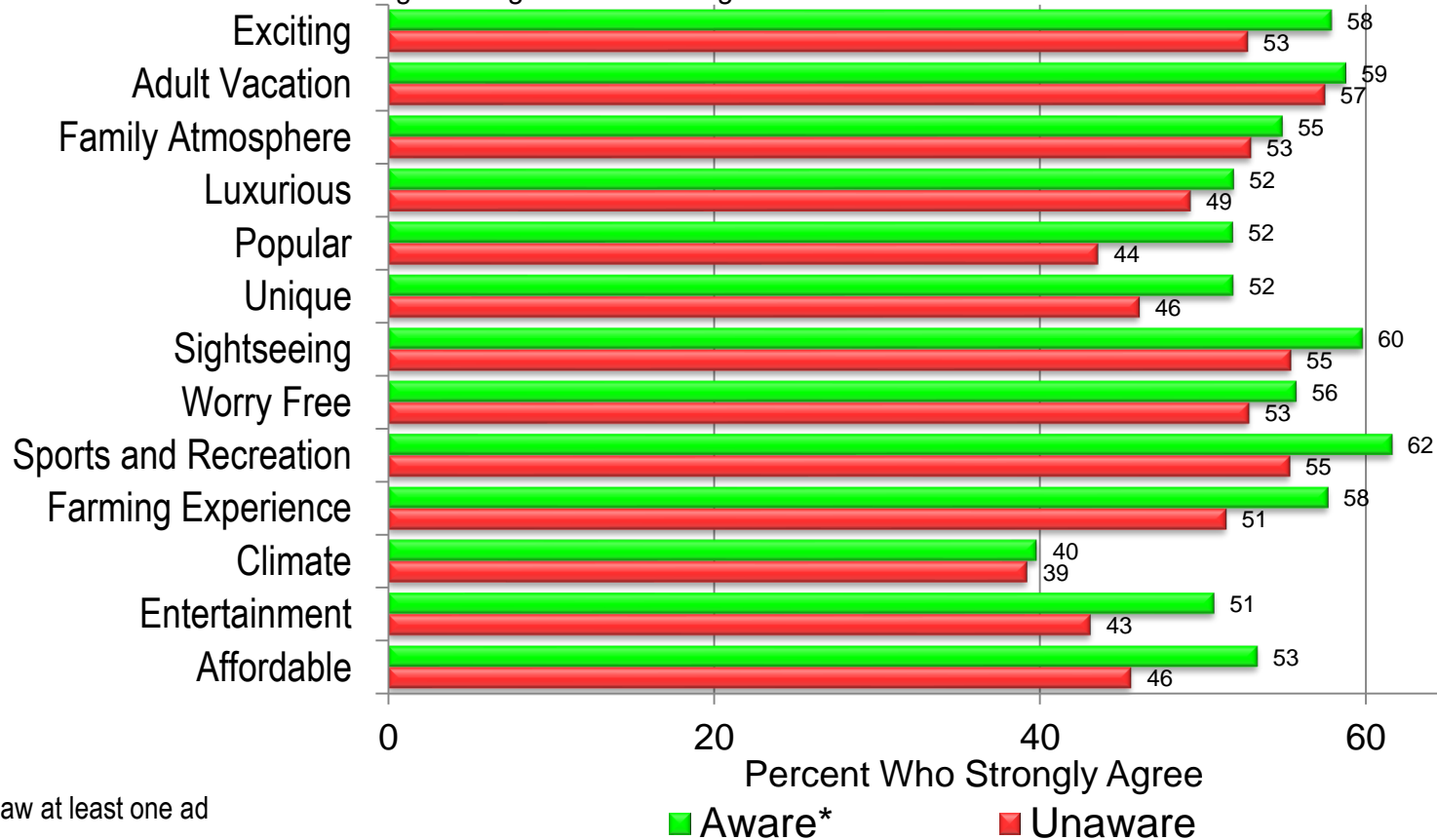
\*\*"Percent who strongly agree" is the percent of respondents giving a statement an agree/disagree rating of 8, 9 or 10 out of 10



# Impact of Advertising on Image

## – All Advertising Markets

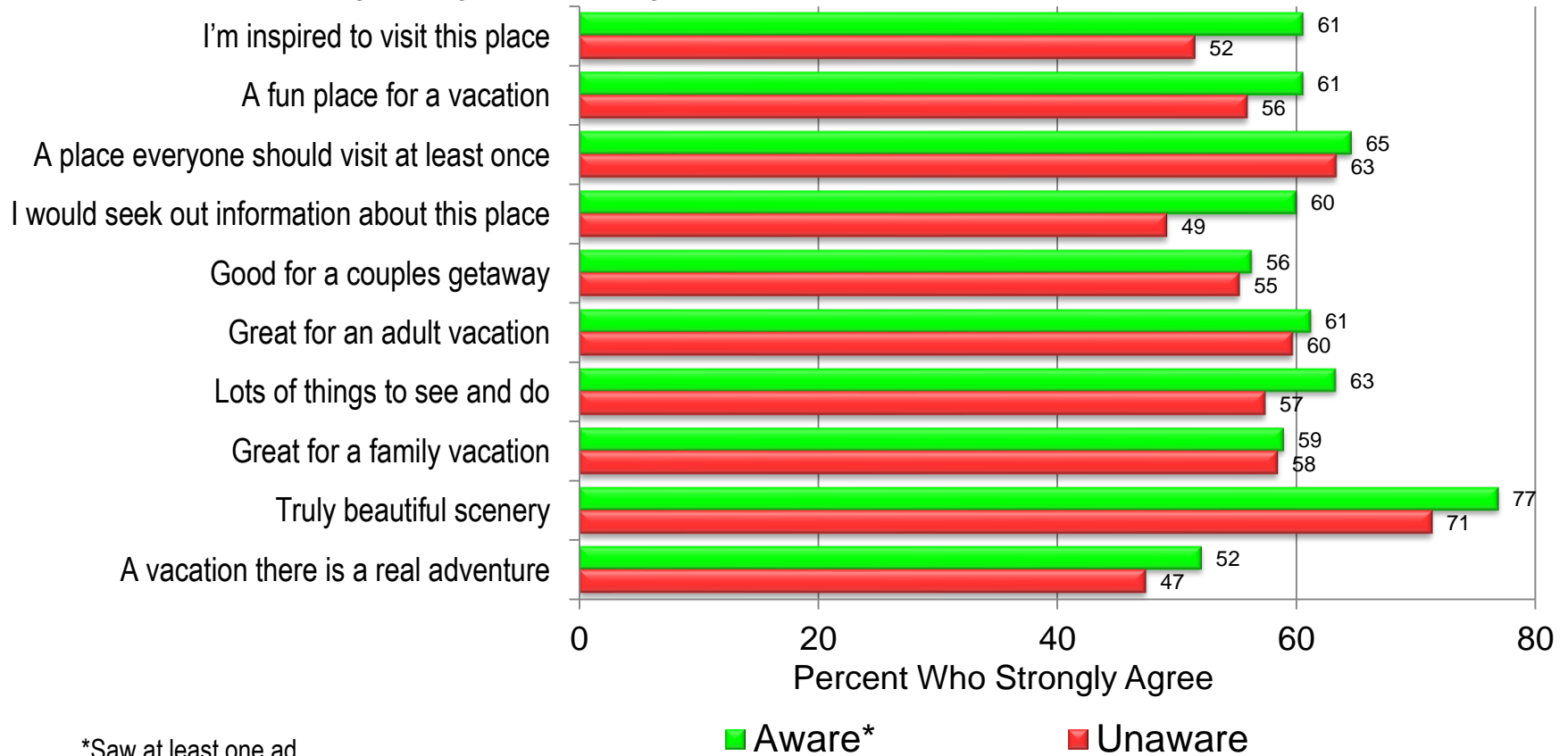
Base: Residents of Oregon's Regional Advertising Markets



\*Saw at least one ad

# Impact of Advertising on Oregon's Hot Buttons

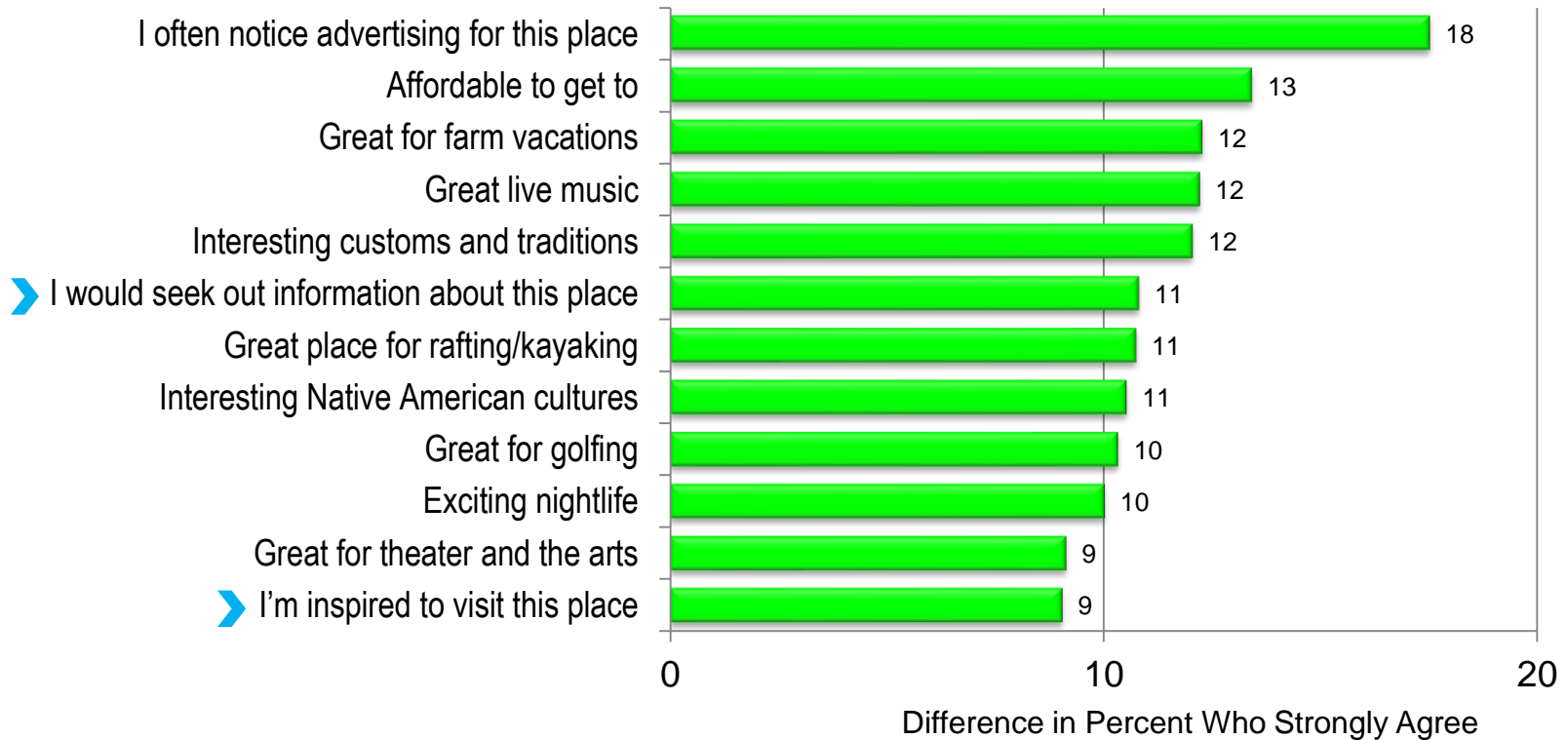
Base: Residents of Oregon's Regional Advertising Markets



\*Saw at least one ad

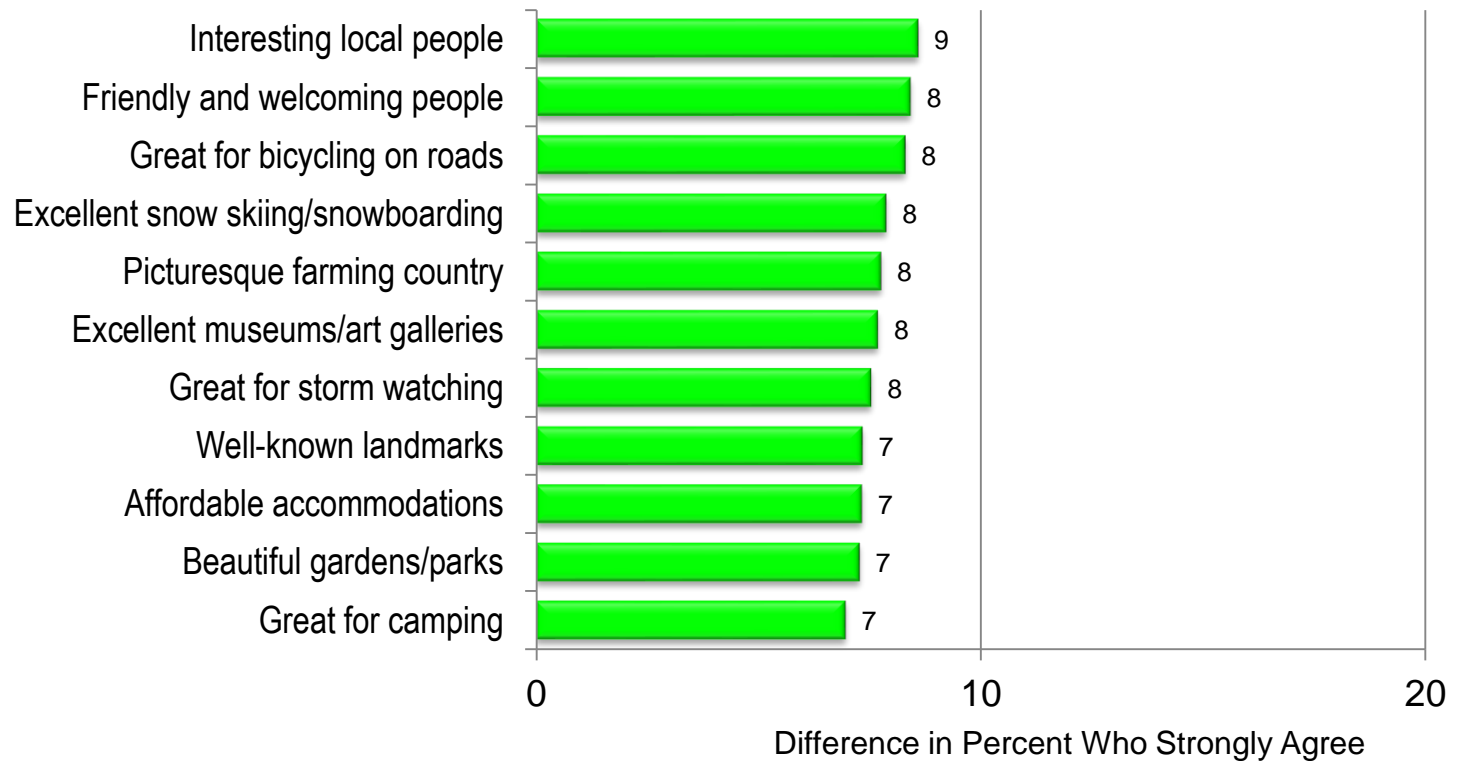
# Image Attributes Most Impacted by Advertising

Base: Residents of Oregon's Regional Advertising Markets



# Image Attributes Most Impacted by Advertising (Cont'd)

Base: Residents of Oregon's Regional Advertising Markets



# Image Attributes Most Impacted by Advertising (Cont'd)

Base: Residents of Oregon's Regional Advertising Markets





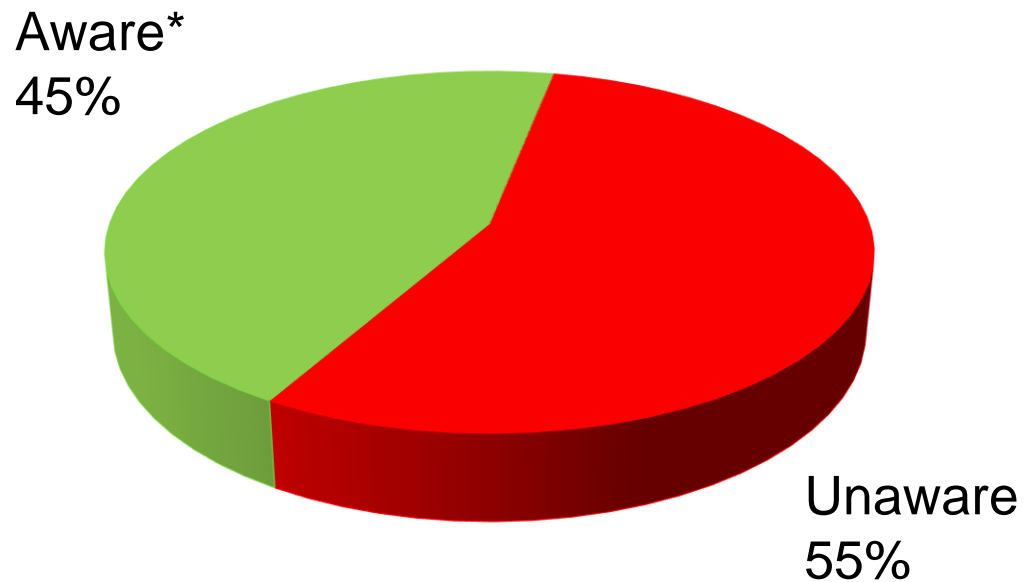
# Advertising Awareness

# Advertising Awareness

- Almost 5 in 10 (45%) of travelers in Oregon's core markets recalled seeing at least one Oregon tourism ad among the portfolio of 27 they were exposed to in the survey.
- Among those who saw Oregon ads in several types of media, ad recall was highest for digital ads (37%), followed by OOH (23%).
- The ads with the highest level of recall were:
  - State Silhouette Compilation
  - You Might Like Oregon Compilation
  - Robot Fish Intro Video
  - Robot Fish Banner Compilation
  - Portland OOH

# Awareness of the Ad Campaign

Base: Residents of Oregon's Regional Advertising Markets

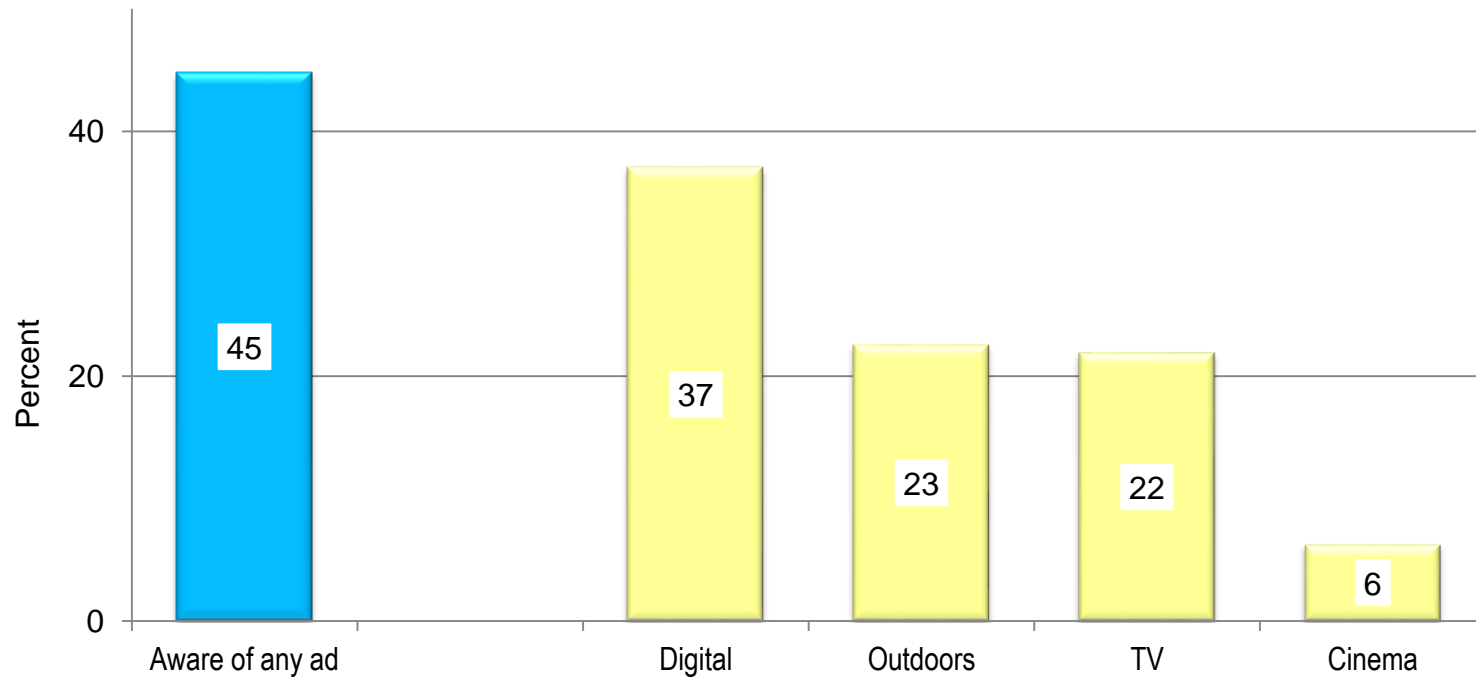


\*Saw at least one ad



# Advertising Awareness\* by Medium

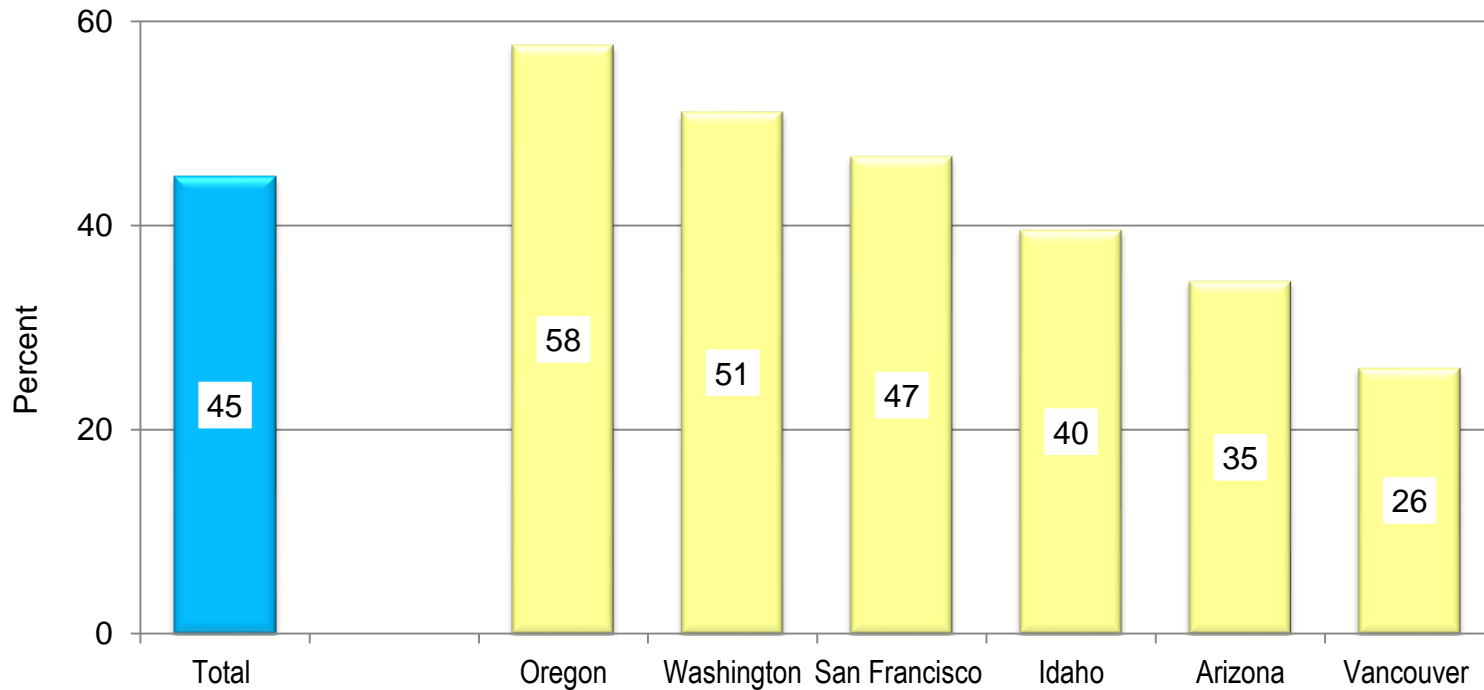
Base: Residents of Oregon's Regional Advertising Markets



\*Saw at least one ad

# Awareness\* by Market

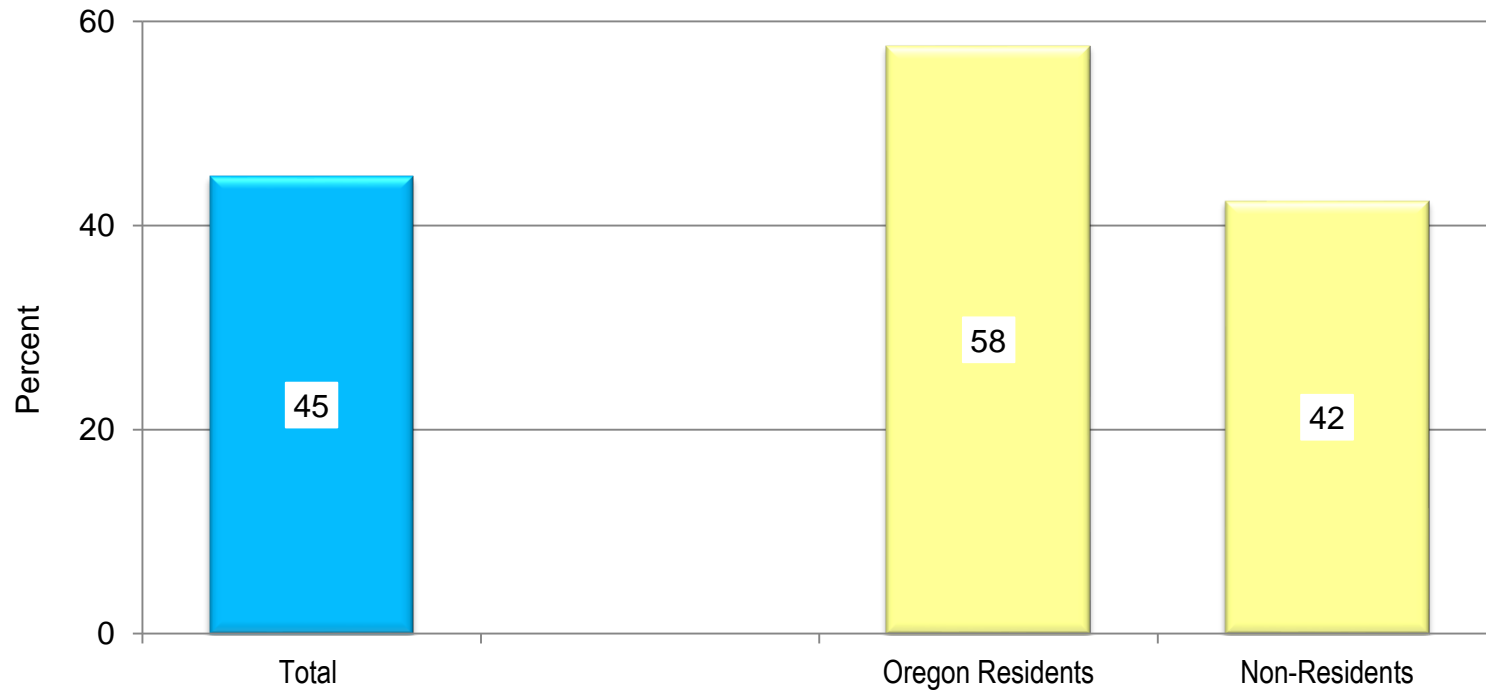
Base: Residents of Oregon's Regional Advertising Markets



\*Saw at least one ad

# Awareness\* by Oregon Residents v. Others

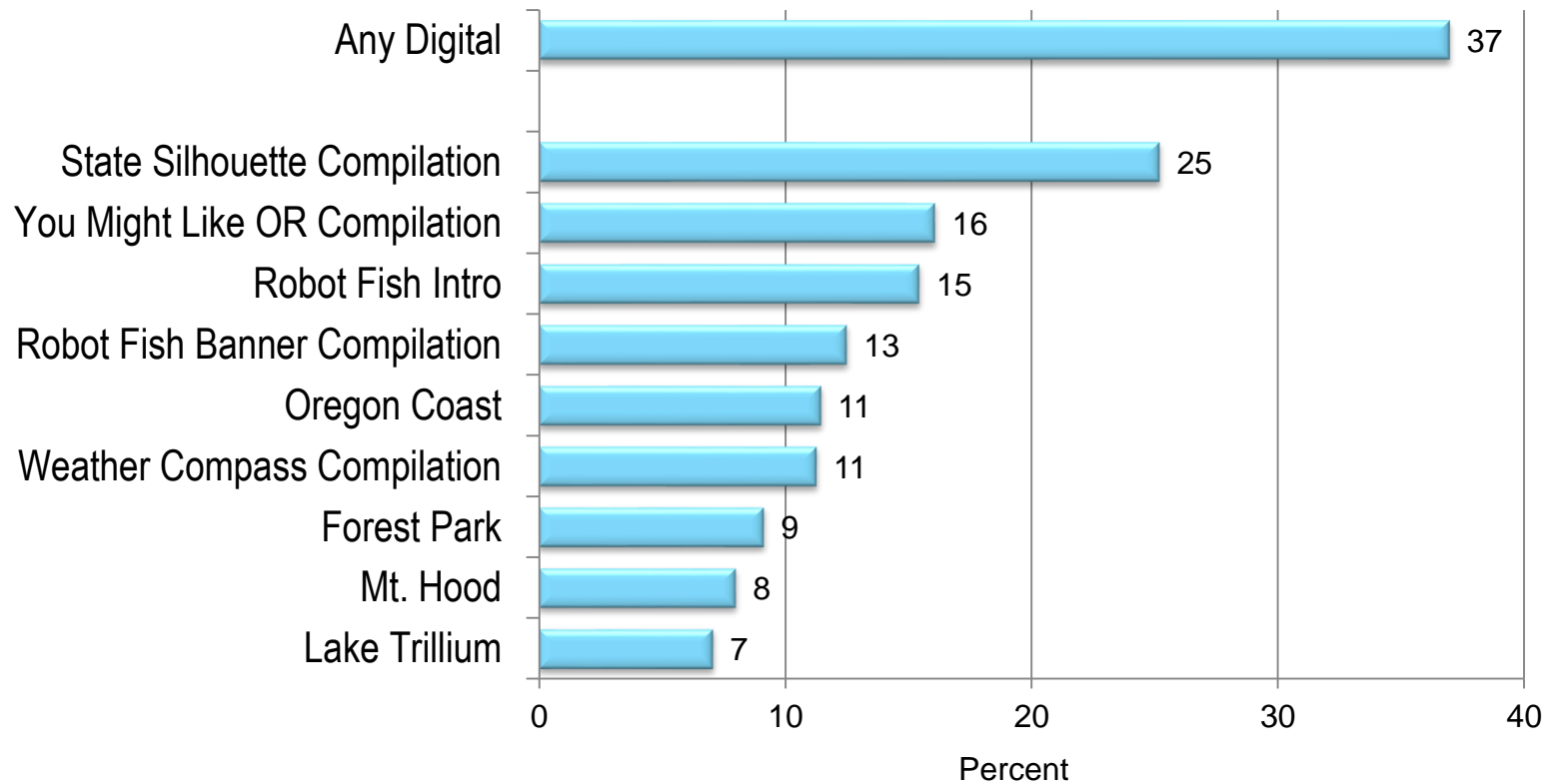
Base: Residents of Oregon's Regional Advertising Markets



\*Saw at least one ad

# Awareness of Individual Ads\*

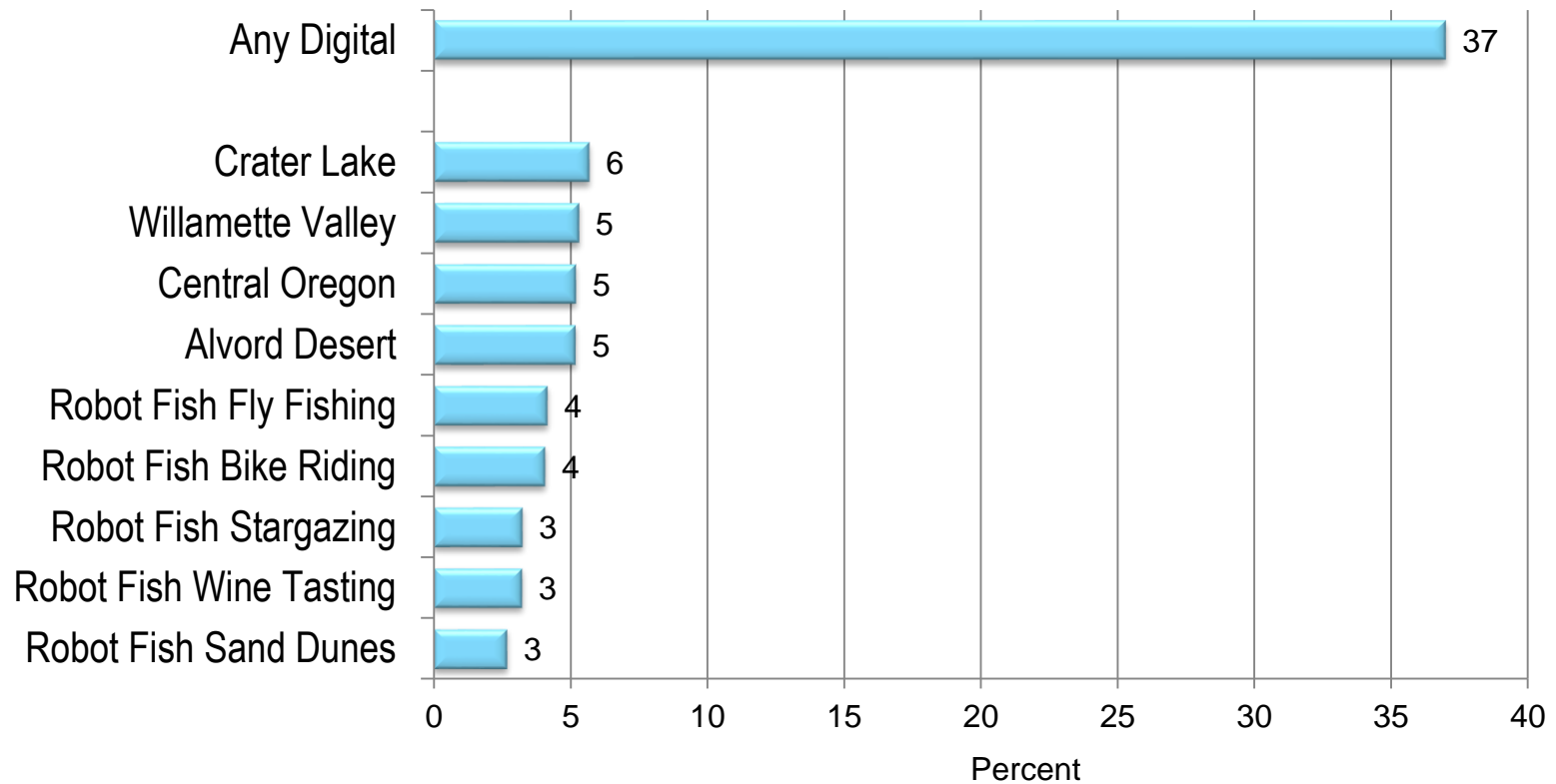
## — Digital



\*Based on markets where shown

# Awareness of Individual Ads\*

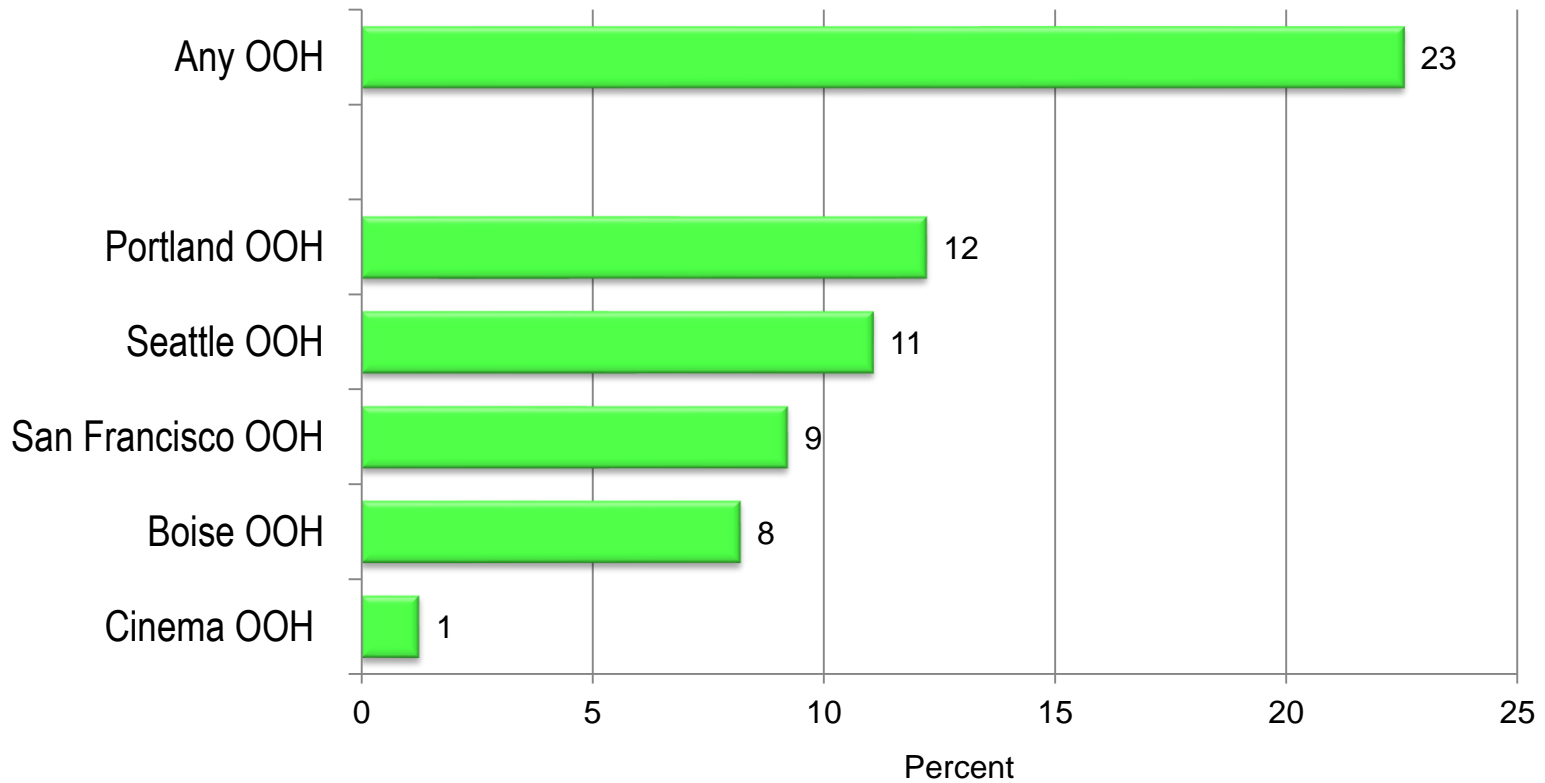
## — Digital (Cont'd)



\*Based on markets where shown

# Awareness of Individual Ads\*

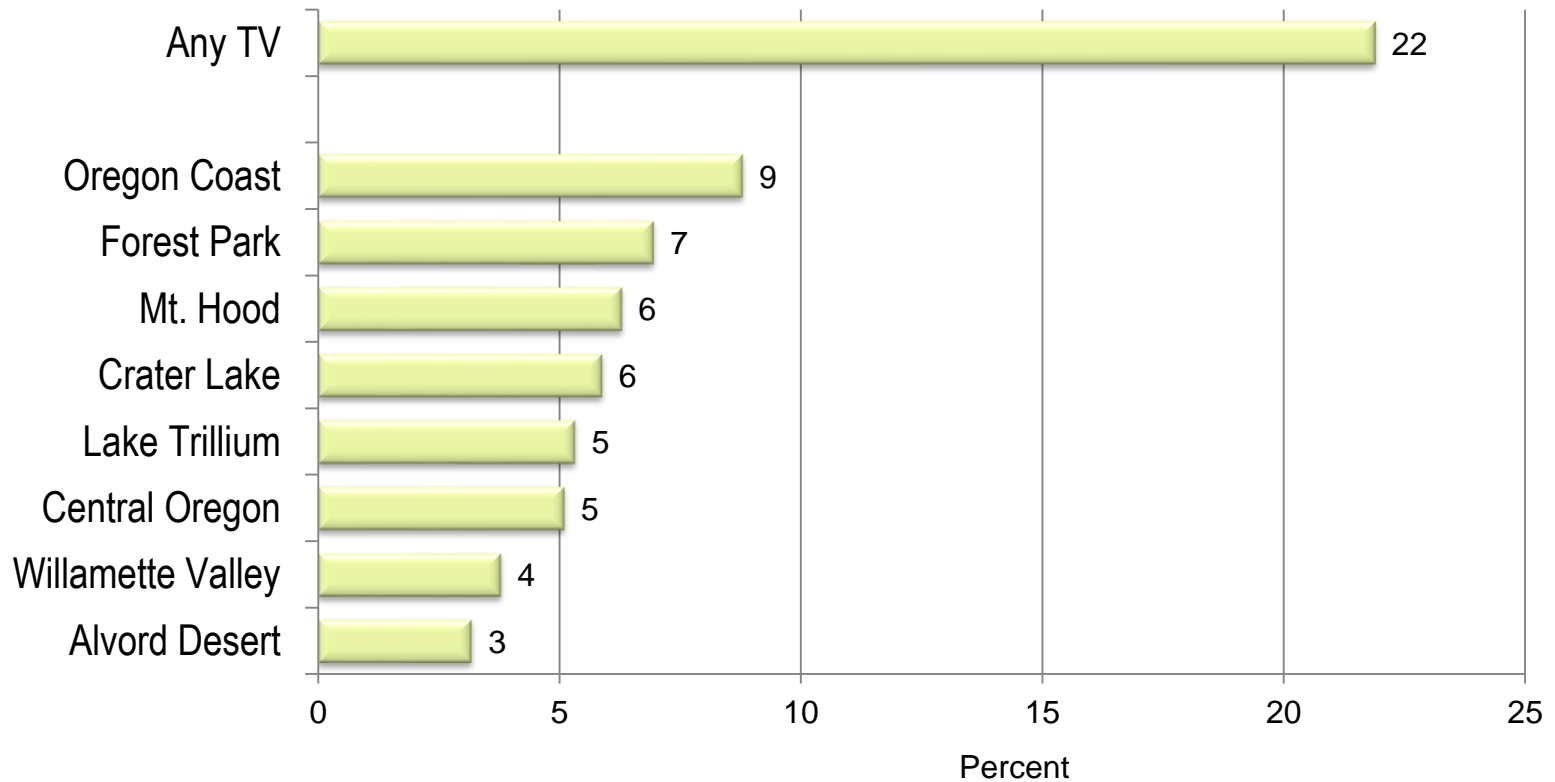
## — OOH



\*Based on markets where shown

# Awareness of Individual Ads\*

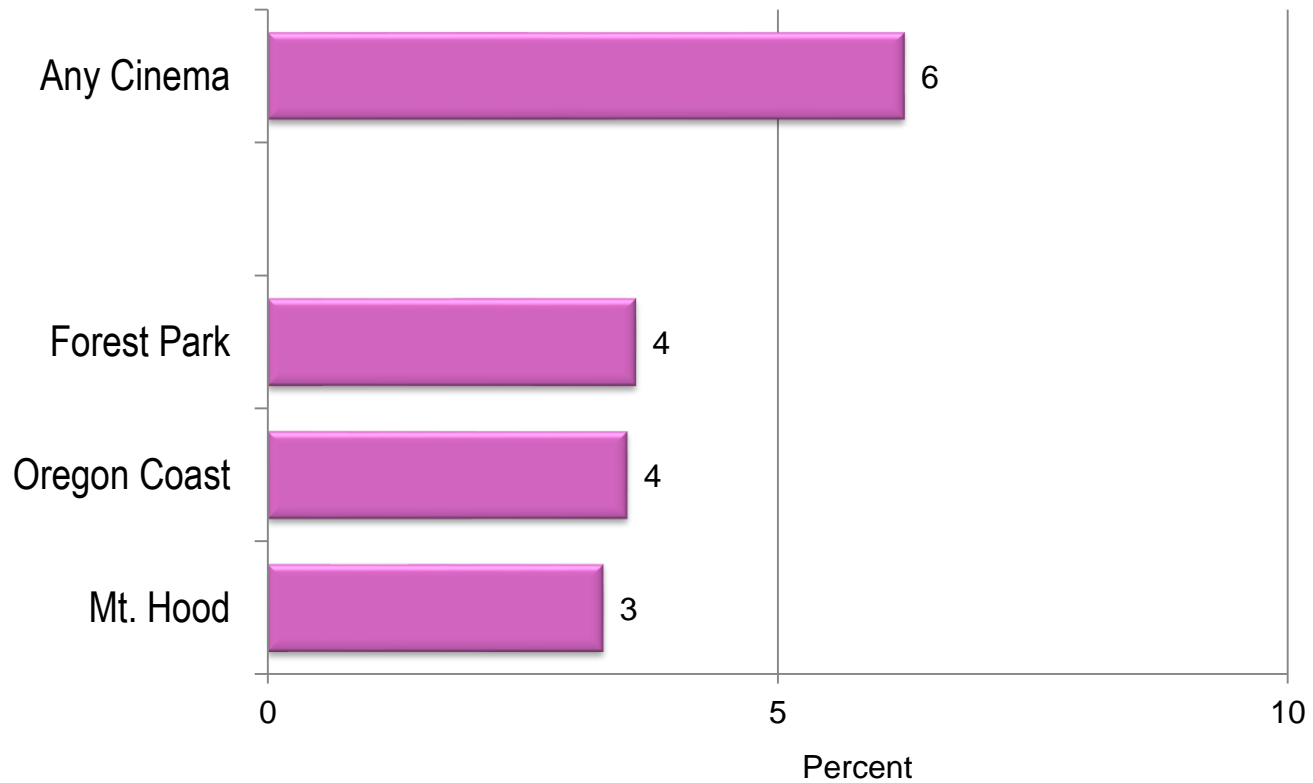
## — TV



\*Based on markets where shown

# Awareness of Individual Ads\*

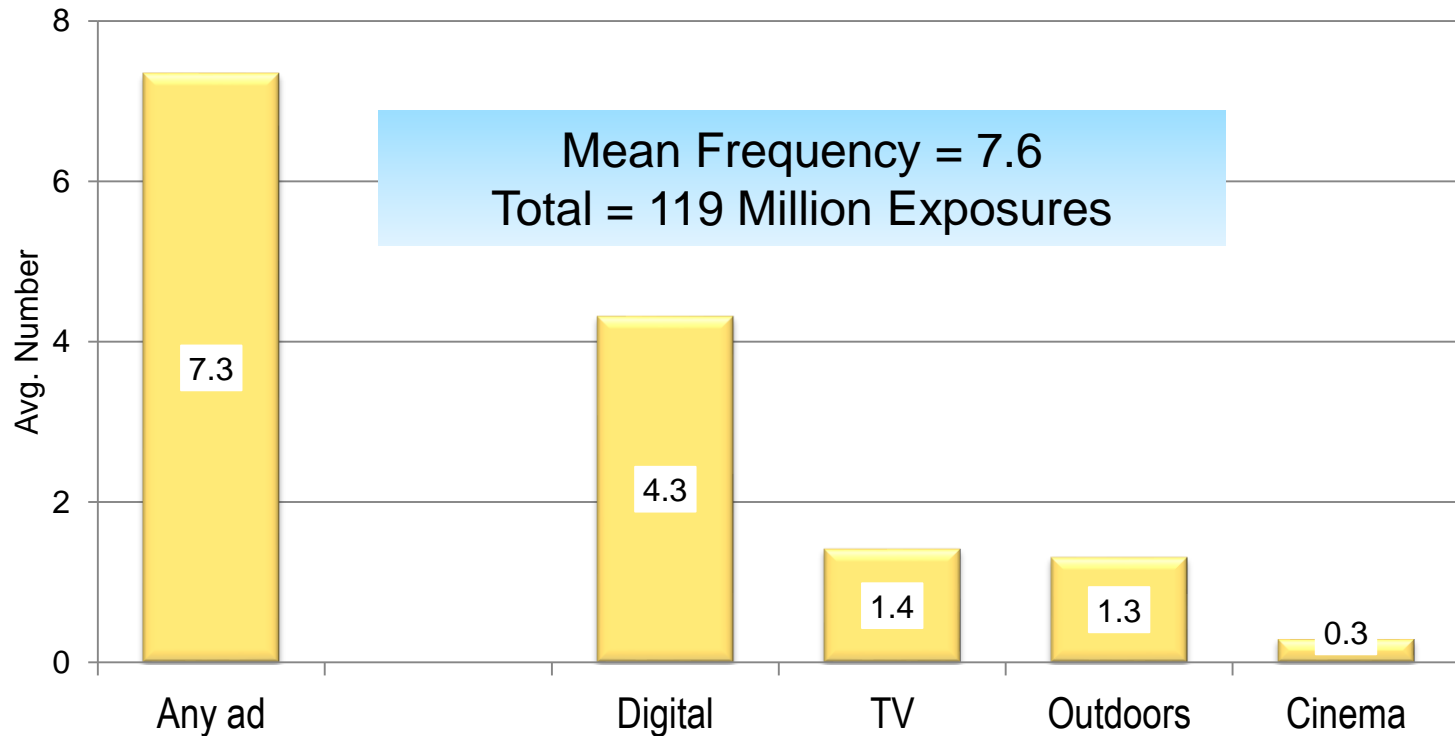
## — Cinema



\*Based on markets where shown

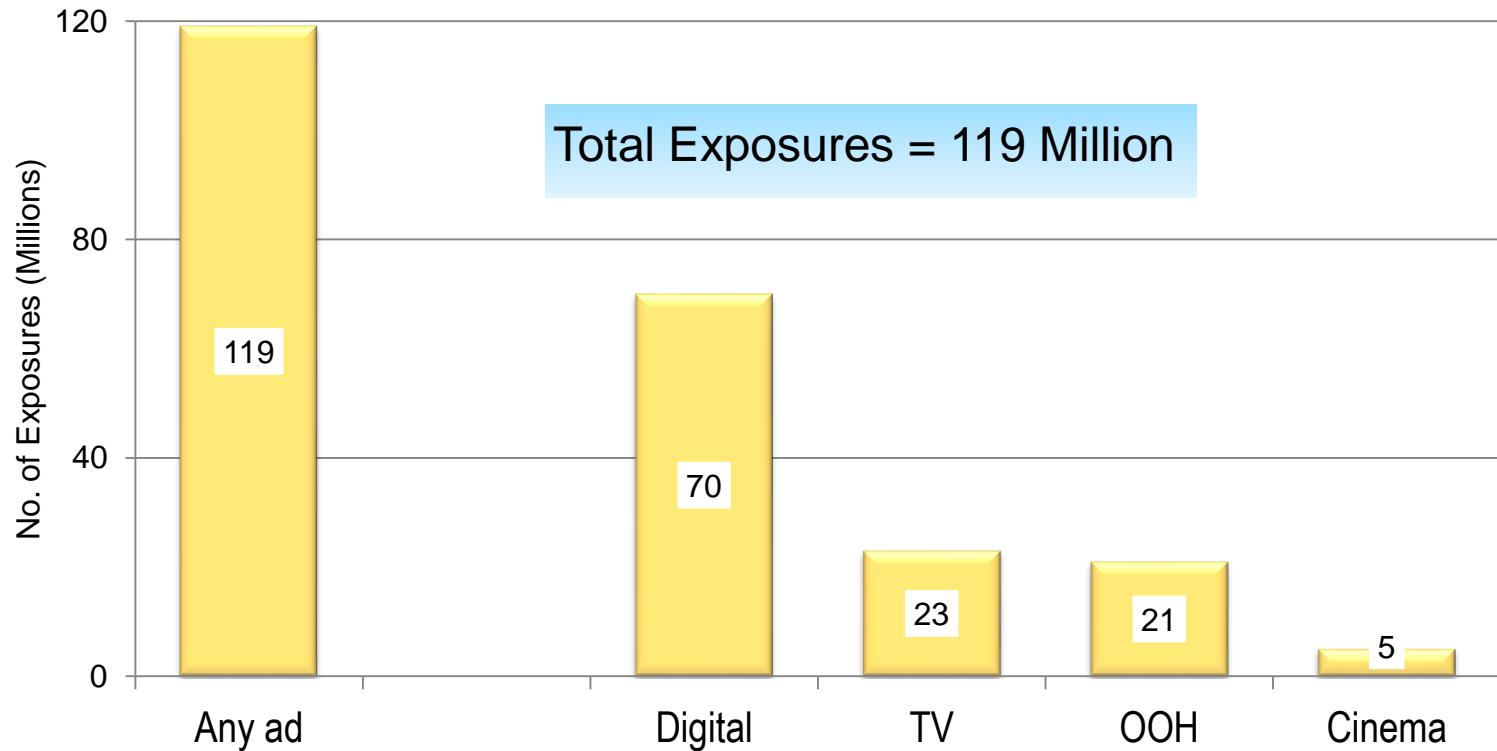


# Frequency of Ad Exposures Recalled



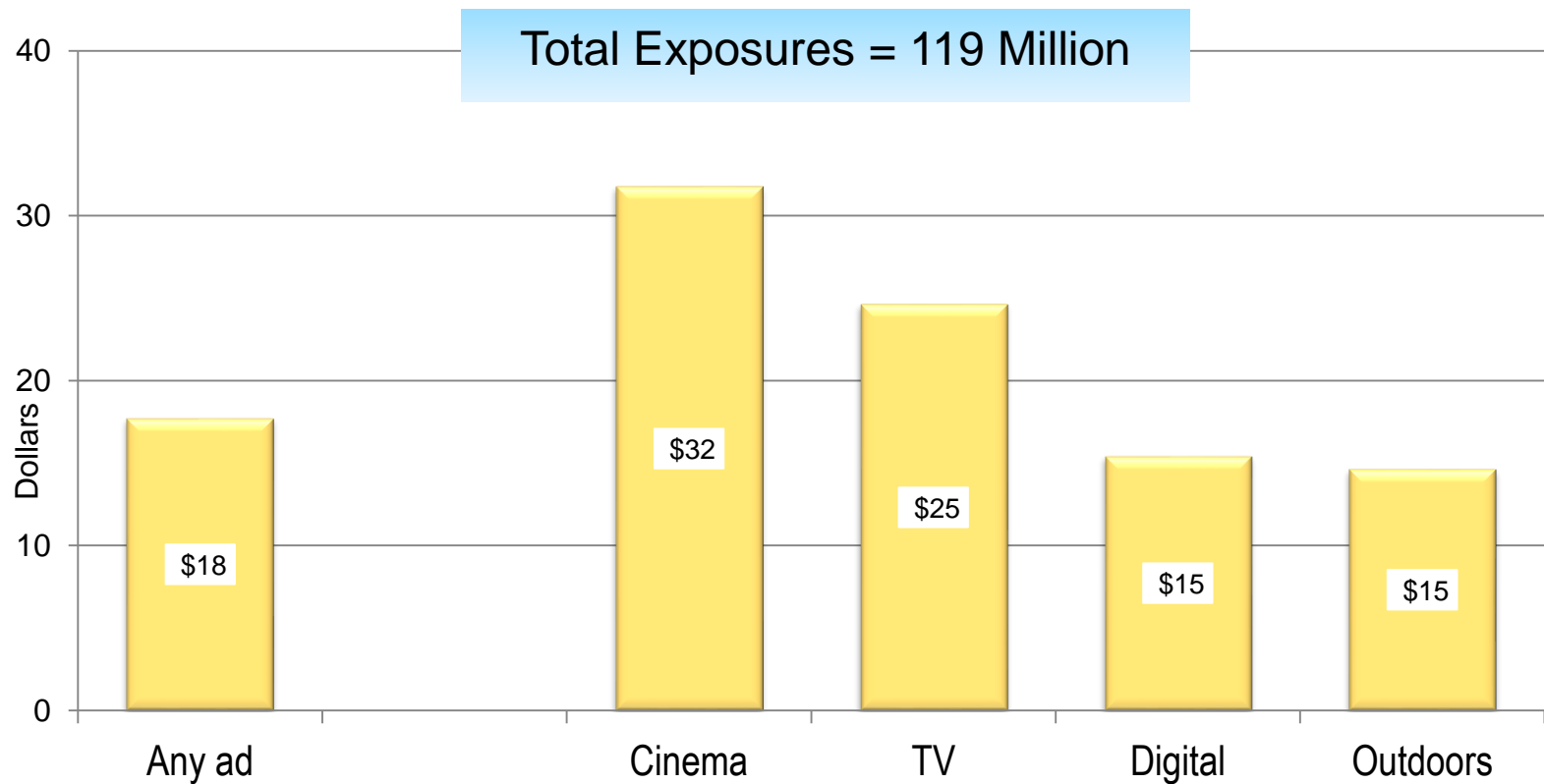
\*Saw at least one ad

# Total Exposures Recalled by Medium

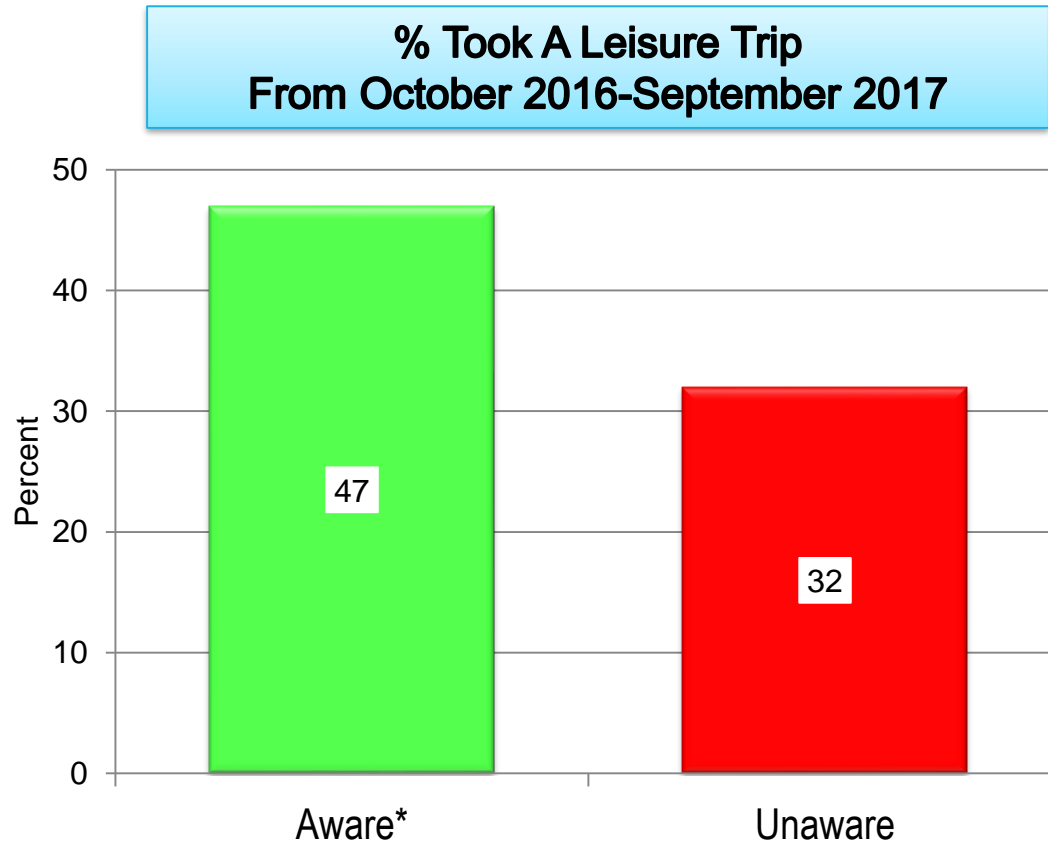


\*Incidence of awareness x population aware x mean frequency recalled

# Cost per Thousand Exposures Recalled – by Medium



# Impact of Advertising on Short-term Trip Taking to Oregon



\*Saw at least one ad



## Bottom Line Advertising Impacts

# Advertising Impacts

- The campaign generated 1.22 million incremental trips that would not otherwise have taken place, which brought almost \$331.4 million in incremental visitor spending and nearly \$17 million in state and local taxes.
- It cost \$1.73 in advertising to generate each incremental trip.
- 766,573 million incremental trips were overnight trips and 452,814 million were day trips
- Every \$1 invested in the Oregon ad campaign in the evaluated markets generated \$157 in visitor spending and \$8 in tax revenue for the benefit of Oregon residents.

# Oregon Campaign Efficiency

	Total
Ad Investment	\$ 2.11 Million
Incremental Trips	1.22 Million
Incremental Visitor Spending	\$ 331.4 Million
Incremental Taxes	\$ 16.71 Million

- Ad Investment excludes Production/Other Costs
- Visitor spending based on Avg. Per-Person Expenditures = \$336.88 for overnight visitors and \$161.56 for day visitors
- Effective Direct Tax rates 2.88% State and 2.17% Local

# Incremental Trips Due to Advertising

Overnight Trips	766,573
Day Trips	452,814
Total	1,219,387



# The Bottom Line

**Every \$1 invested in the Oregon ad campaign generated almost \$157 in visitor spending and about \$8 in state and local tax revenue**

	Total
Spending ROI	\$157
Tax ROI	\$8



SEE OREGON IN 360°  
WITH THIS ROBOT FISH.

OR

**Longwoods**  
INTERNATIONAL

## Appendix I: Oregon's Image Strengths and Weaknesses vs. Individual Competitors

# Image of the Competition-British Columbia

- The only non-U.S. destination in the study, British Columbia was rated highest in the group for uniqueness, including offering a unique vacation experience, scenery, local people, and customs and traditions.
- British Columbia ranked higher than Oregon in suitability for an adult vacation, being an exciting/adventurous place to visit, and its popularity. It was rated slightly higher in being worry-free as well.
- British Columbia ties with Oregon in being a worry-free destination with friendly people.
- Oregon is considered better than British Columbia for children's activities, sightseeing, sports and recreation, especially camping, farming experiences, overall climate, entertainment, and affordability.

# Image of the Competition-California

- California stood out in the competitive set, capturing the top spot in excitement, suitability for both adults and families, luxury, popularity, sightseeing opportunities, overall climate, and entertainment.
- California outranked Oregon on uniqueness, including local cooking and scenery.
- On the other end, California was ranked less positively than Oregon in sports and recreation activities, farming-related activities, and affordability.
- California ranked lowest in the group on being a worry-free destination, including safety, crowding, and friendliness of locals.

# Image of the Competition-Washington

- While Oregon ranked higher than Washington in many of the travel motivator categories, the two states had similar scores, with Oregon scoring only slightly better in excitement, suitability for families, and luxury.
  - Washington is seen as having better hotels and restaurants, and more well-known landmarks
- Washington and Oregon were rated similarly in the entertainment category, including nightlife, events and shopping experiences.
- On the other hand, Oregon topped the charts in farming experiences and sports and recreation activities, especially bicycling and camping. Oregon's local and organic food scene was rated highest of all the destinations studied, including Washington.

# Image of the Competition-Montana

- Montana's rankings generally fell lower in the competitive set, though higher than Idaho in many cases:
  - Lead the competitive set in having a safe, worry free atmosphere.
  - Rated at the bottom of the competitive set for entertainment, including the arts and nightlife.
  - Rated less positively than Oregon for excitement, an adult vacation, family atmosphere, luxury, popularity, uniqueness, sightseeing, outdoor sports and recreation activities, farming, climate, and affordability.

# Image of the Competition-Colorado

- Oregon outranked Colorado in all broad categories with the largest lead in farming experiences, entertainment, affordability, and sightseeing.
  - Colorado is seen as being expensive to get to and expensive once in the destination. Oregon is seen as having better festivals and wineries to enjoy, and a better climate overall.
  - As with the other destinations studied, Oregon outperforms Colorado in its offerings of farming experiences, such as organic and local foods, farm vacations, and picturesque farming country.
- Oregon was rated less positively than Colorado for luxury hotels and resorts, hiking, and skiing and snowboarding.

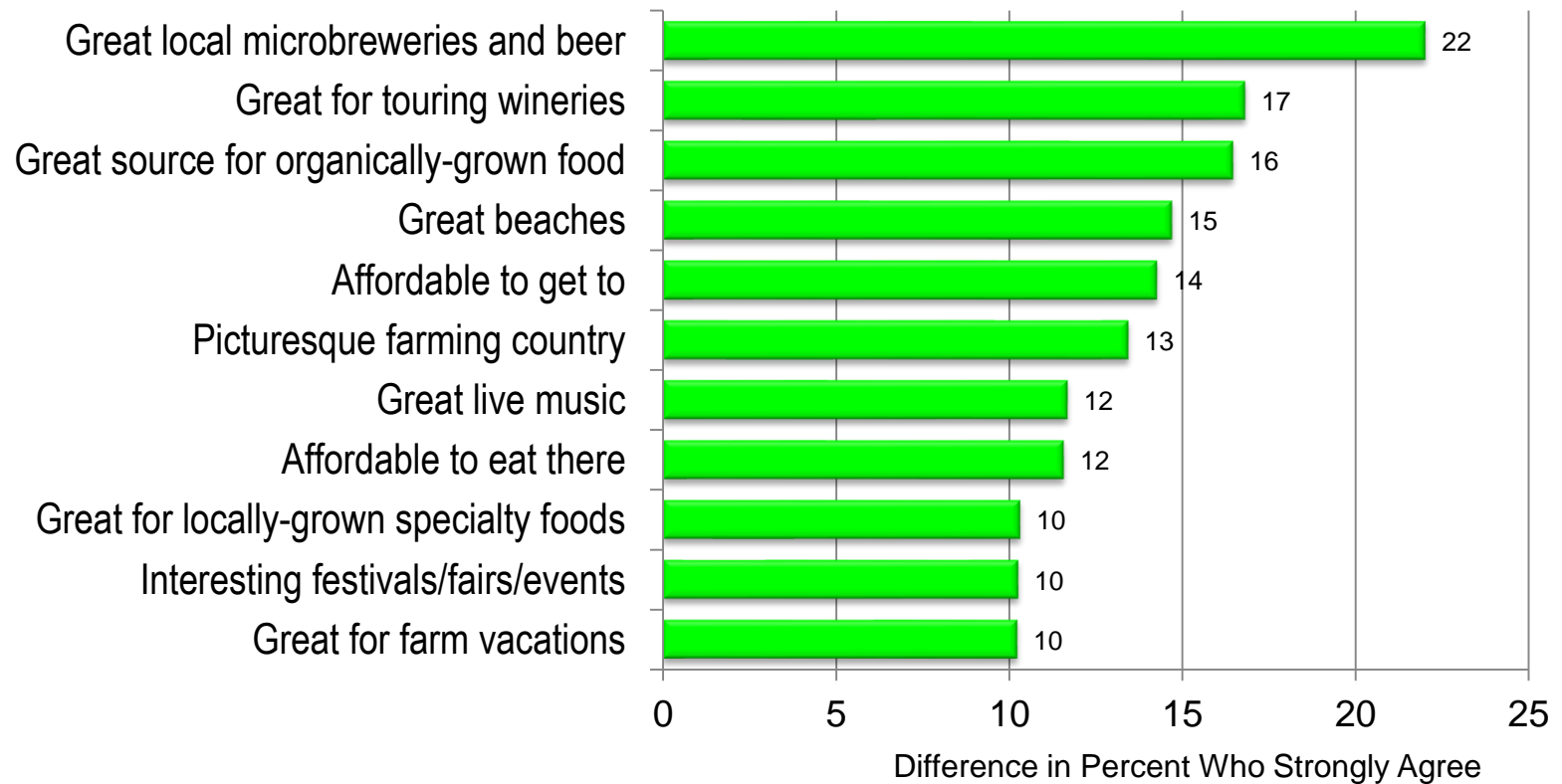
# Image of the Competition-Idaho

- Among the destinations evaluated in this study, Idaho was consistently ranked lowest or nearly lowest for the attributes in question. It received its highest scores in the “Worry-free” category, with high scores for being uncrowded; however, it still ranked below Oregon in the worry-free category overall.
- Idaho did outperform Oregon in the perception of having affordable accommodations and skiing and snowboarding, and had a slightly higher perception as being an affordable place to eat, but in all other attributes, Oregon was ranked higher.



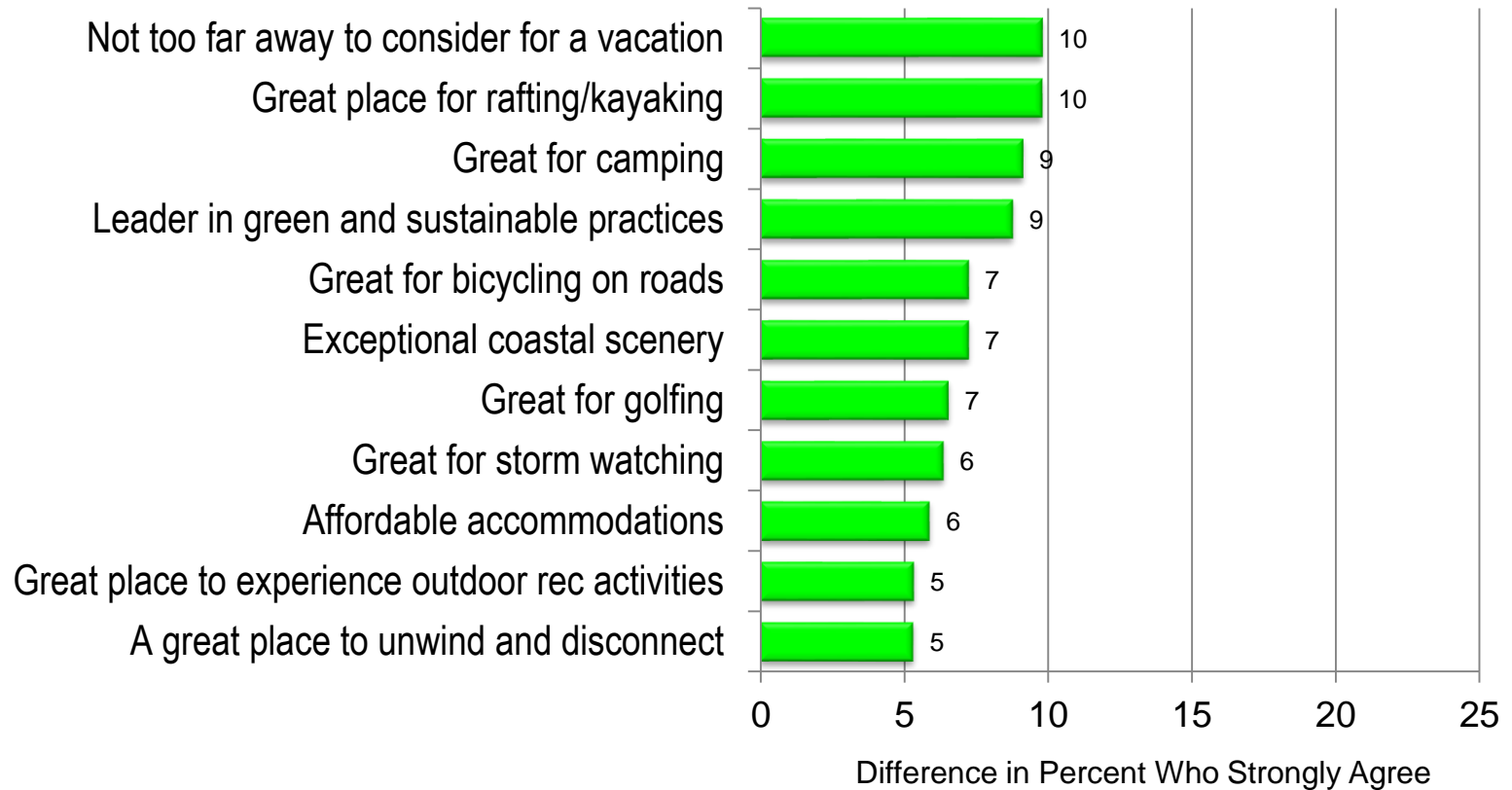
# Oregon's Image Strengths vs. British Columbia

Base: Residents of Oregon's Regional Advertising Markets



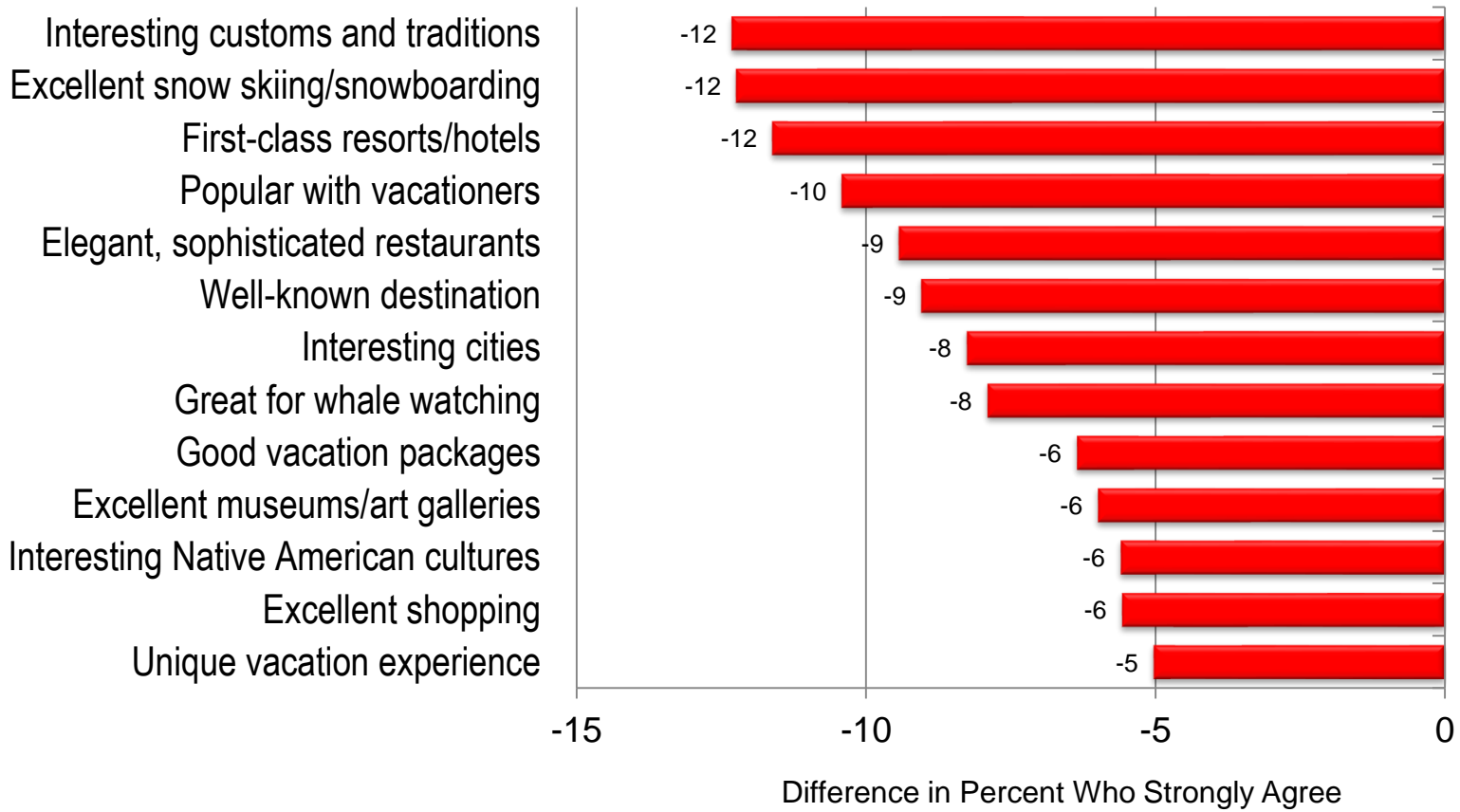
# Oregon's Image Strengths vs. British Columbia (Cont'd)

Base: Residents of Oregon's Regional Advertising Markets



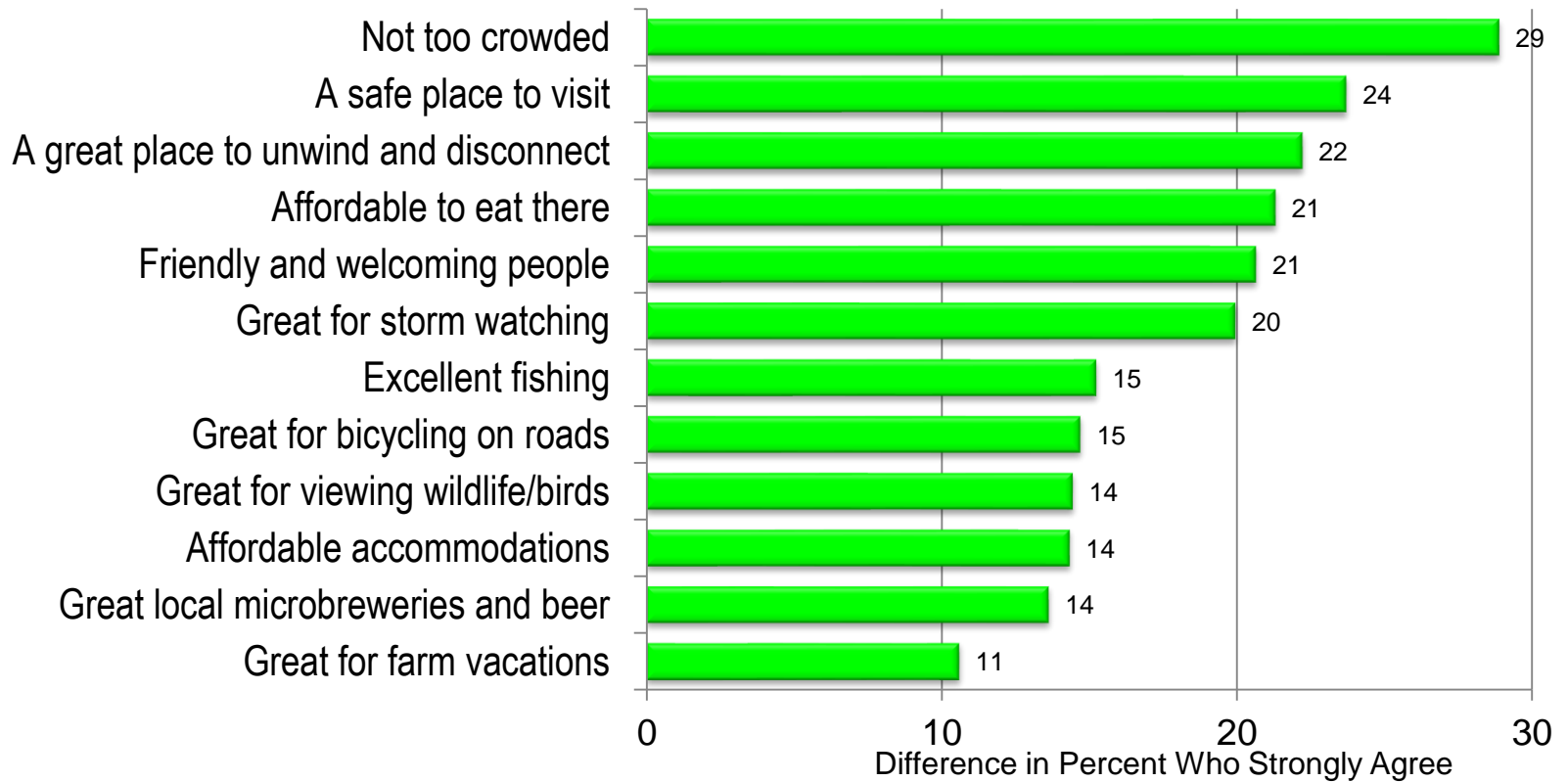
# Oregon's Image Weaknesses vs. British Columbia

Base: Residents of Oregon's Regional Advertising Markets



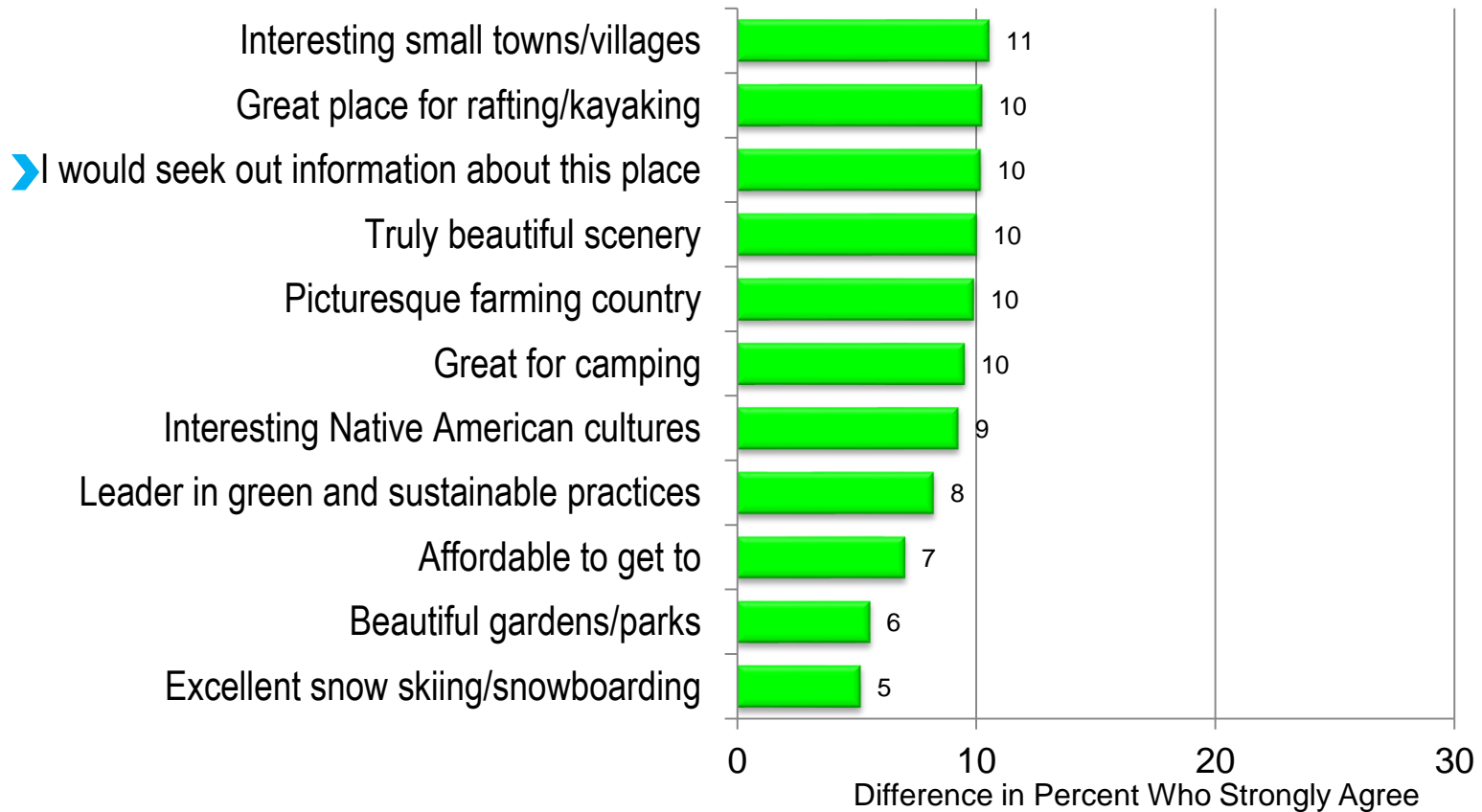
# Oregon's Image Strengths vs. California

Base: Residents of Oregon's Regional Advertising Markets



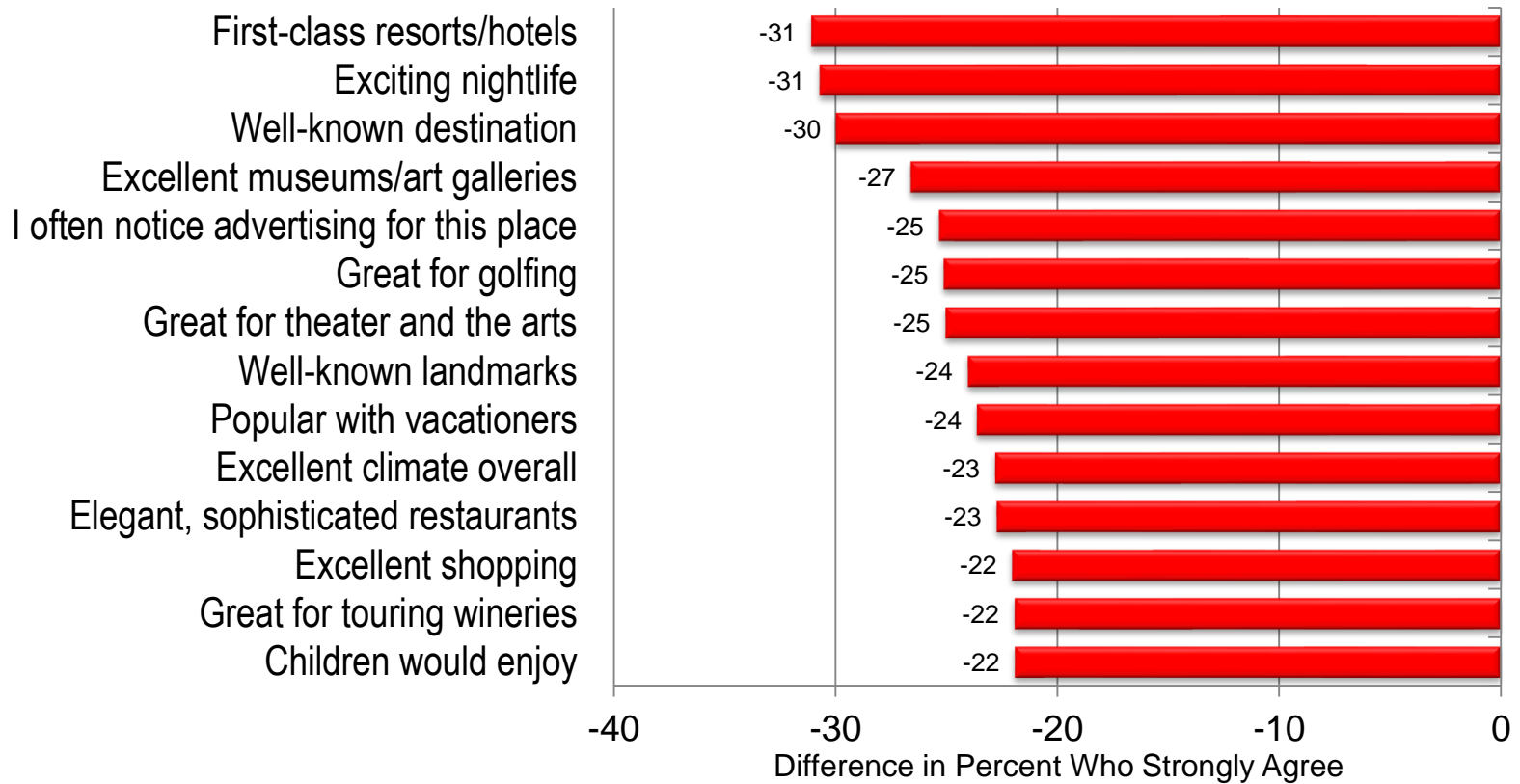
# Oregon's Image Strengths vs. California (Cont'd)

Base: Residents of Oregon's Regional Advertising Markets



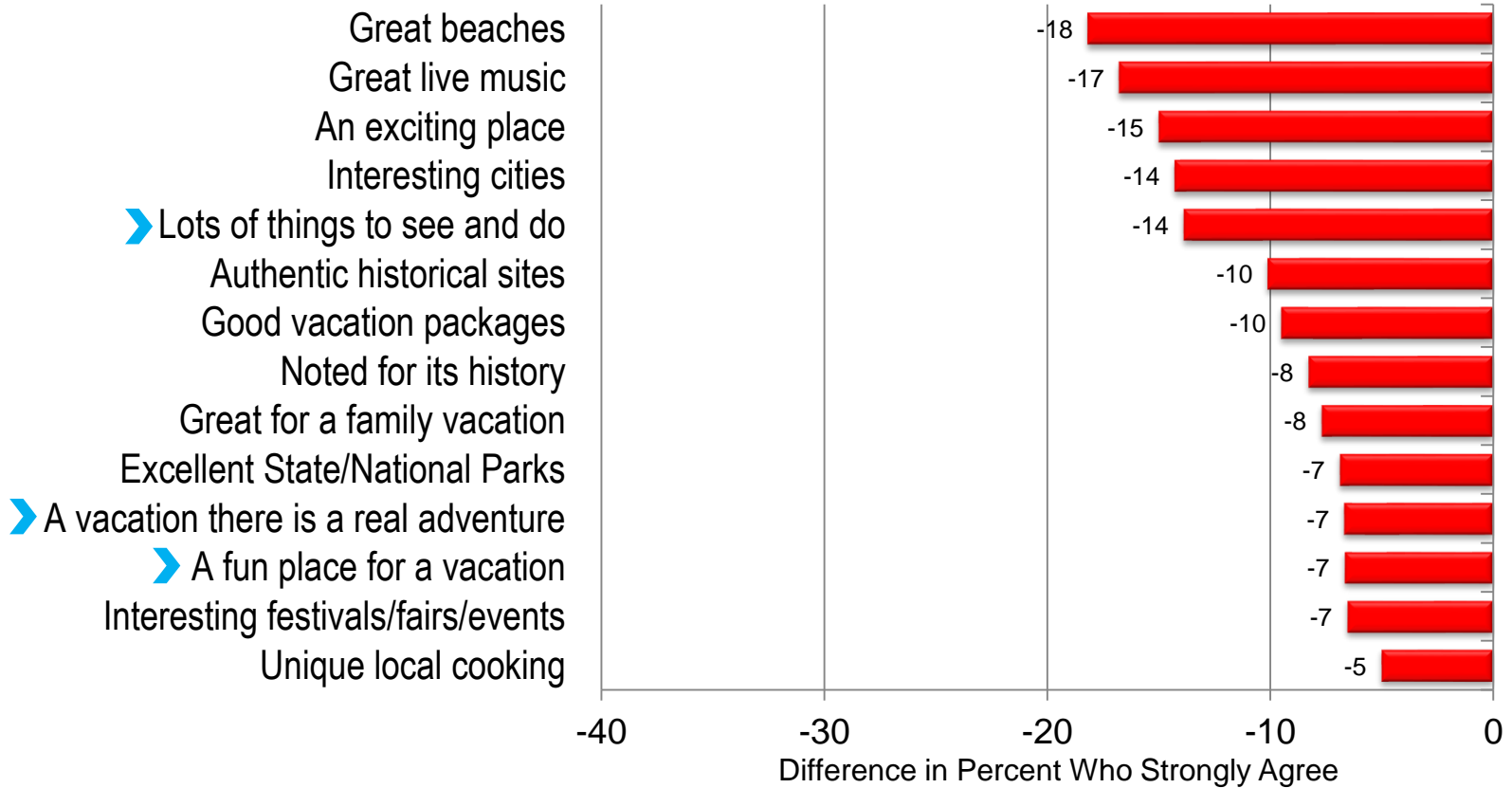
# Oregon's Image Weaknesses vs. California

Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image Weaknesses vs. California (Cont'd)

Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image Strengths vs. Washington

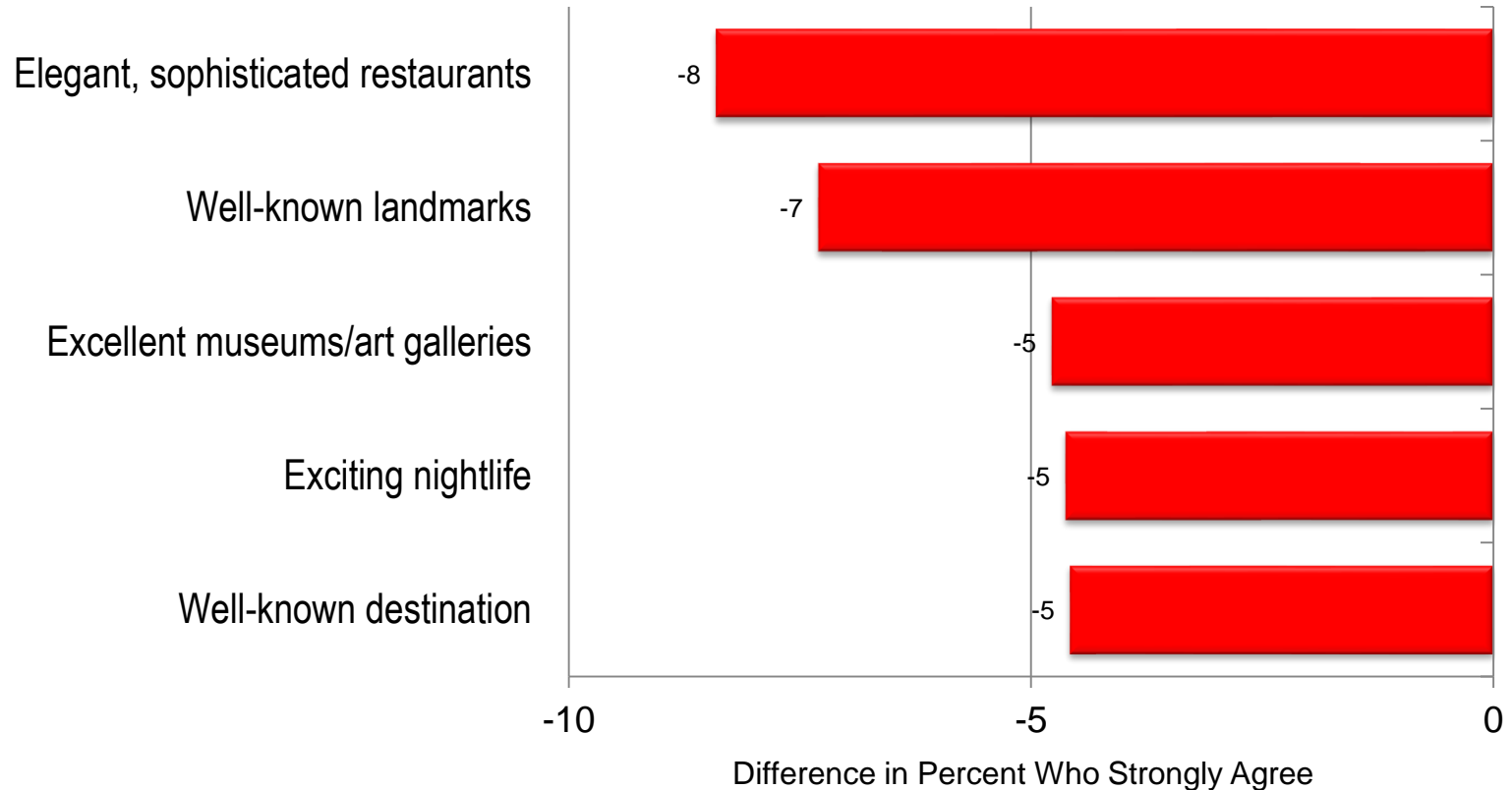
Base: Residents of Oregon's Regional Advertising Markets





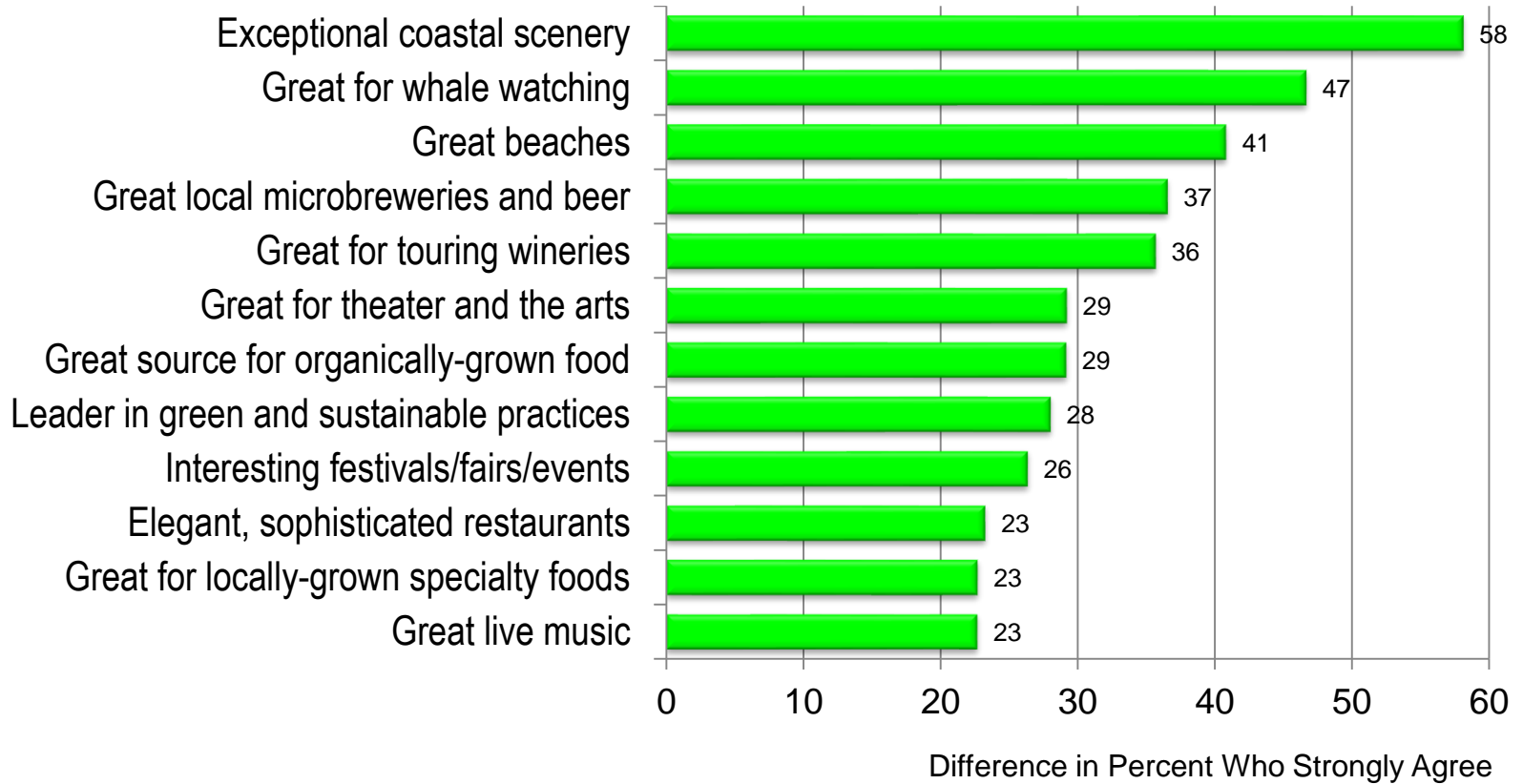
# Oregon's Image Weaknesses vs. Washington

Base: Residents of Oregon's Regional Advertising Markets



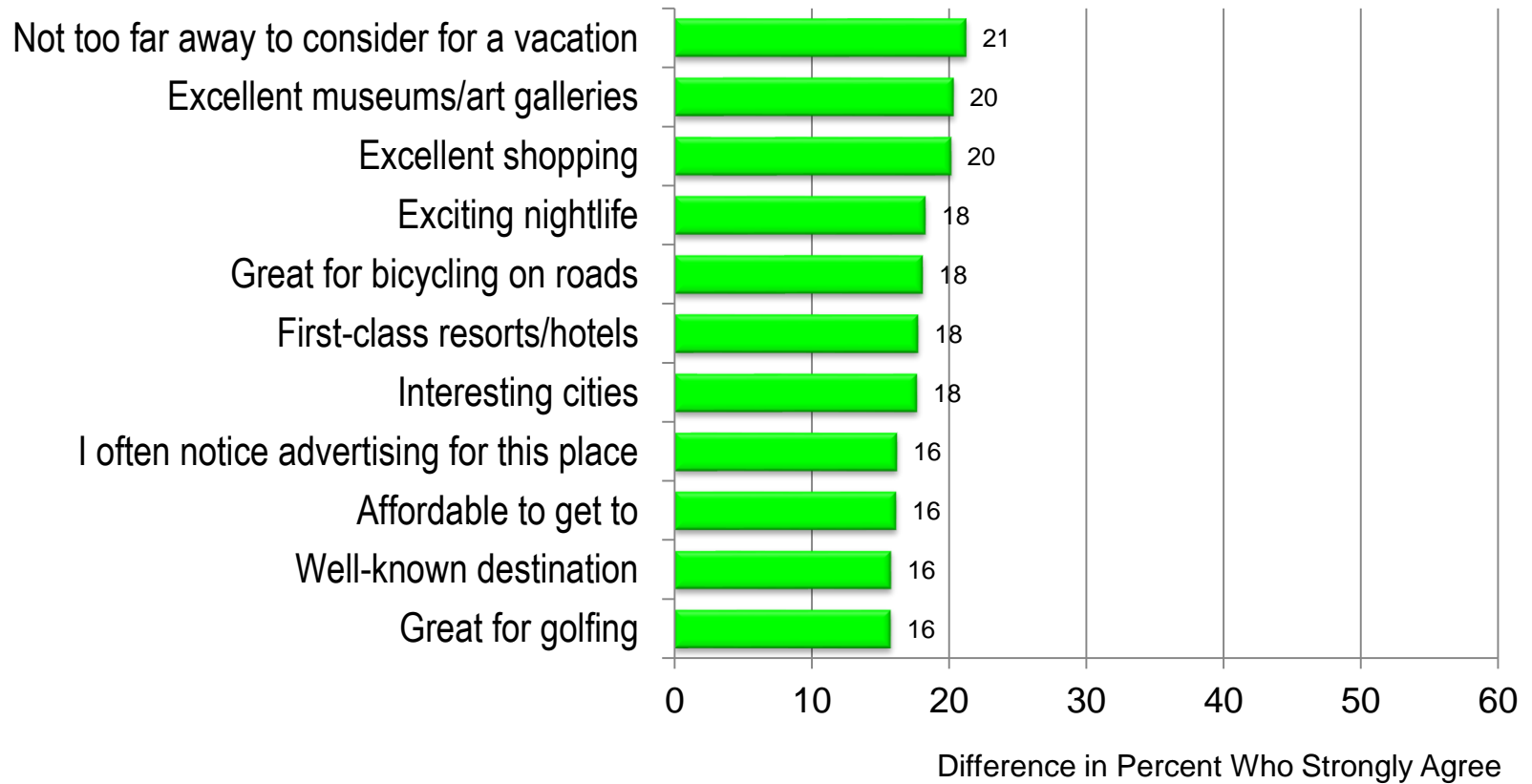
# Oregon's Image Strengths vs. Montana

Base: Residents of Oregon's Regional Advertising Markets



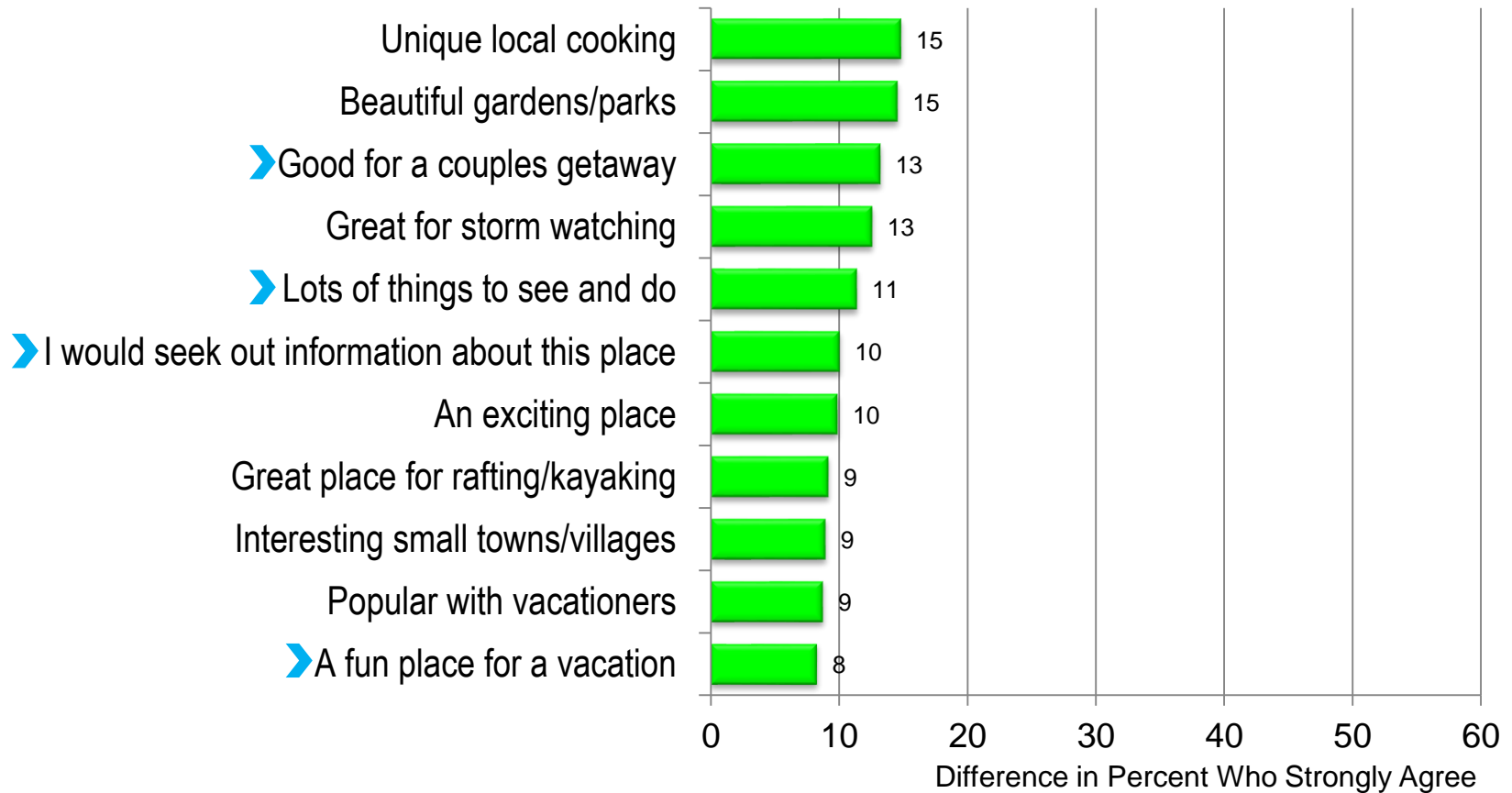
# Oregon's Image Strengths vs. Montana (Cont'd)

Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image Strengths vs. Montana (Cont'd)

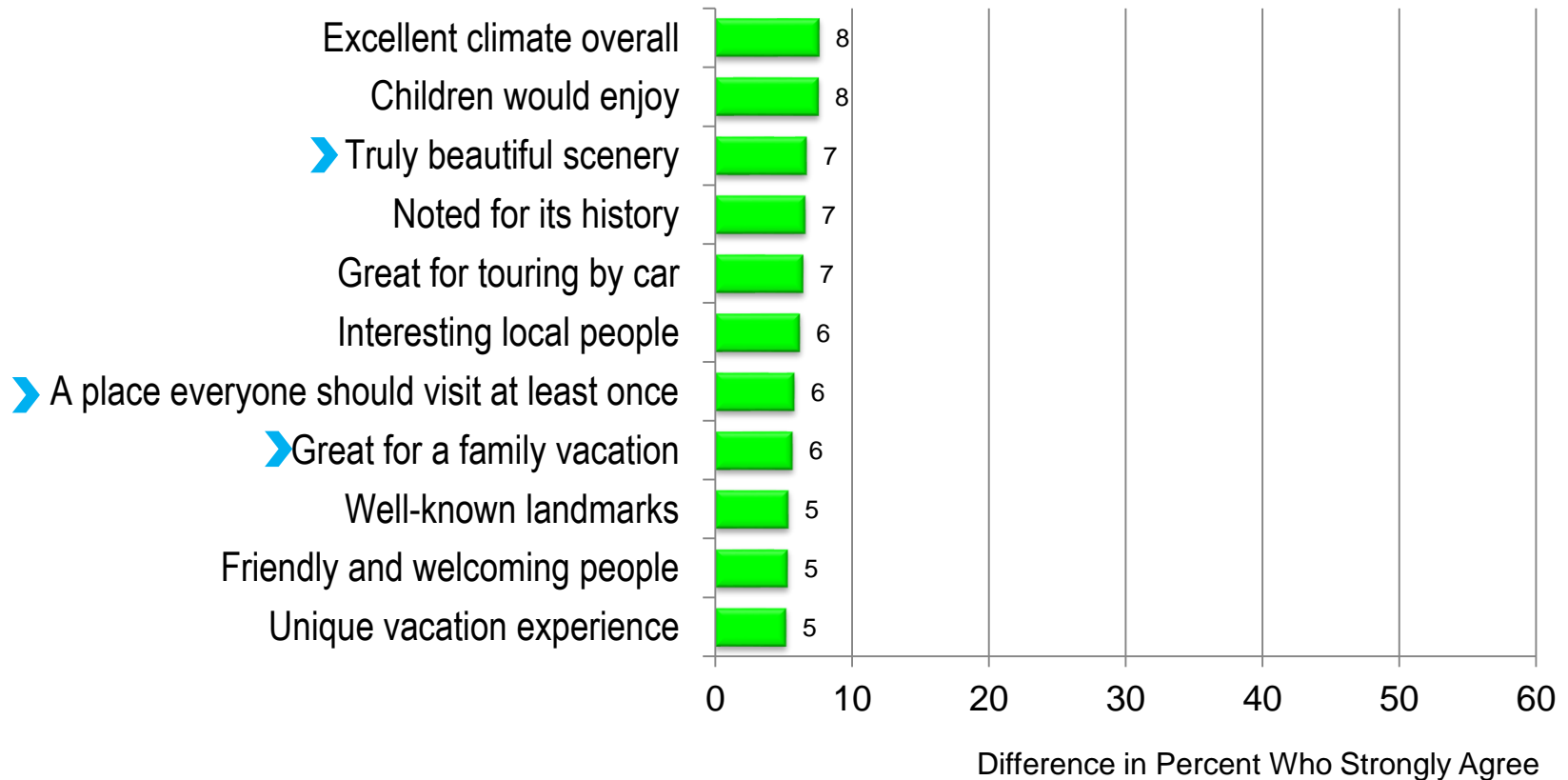
Base: Residents of Oregon's Regional Advertising Markets



\* Attributes marked with a chevron indicate some of the most important image hot buttons for travelers

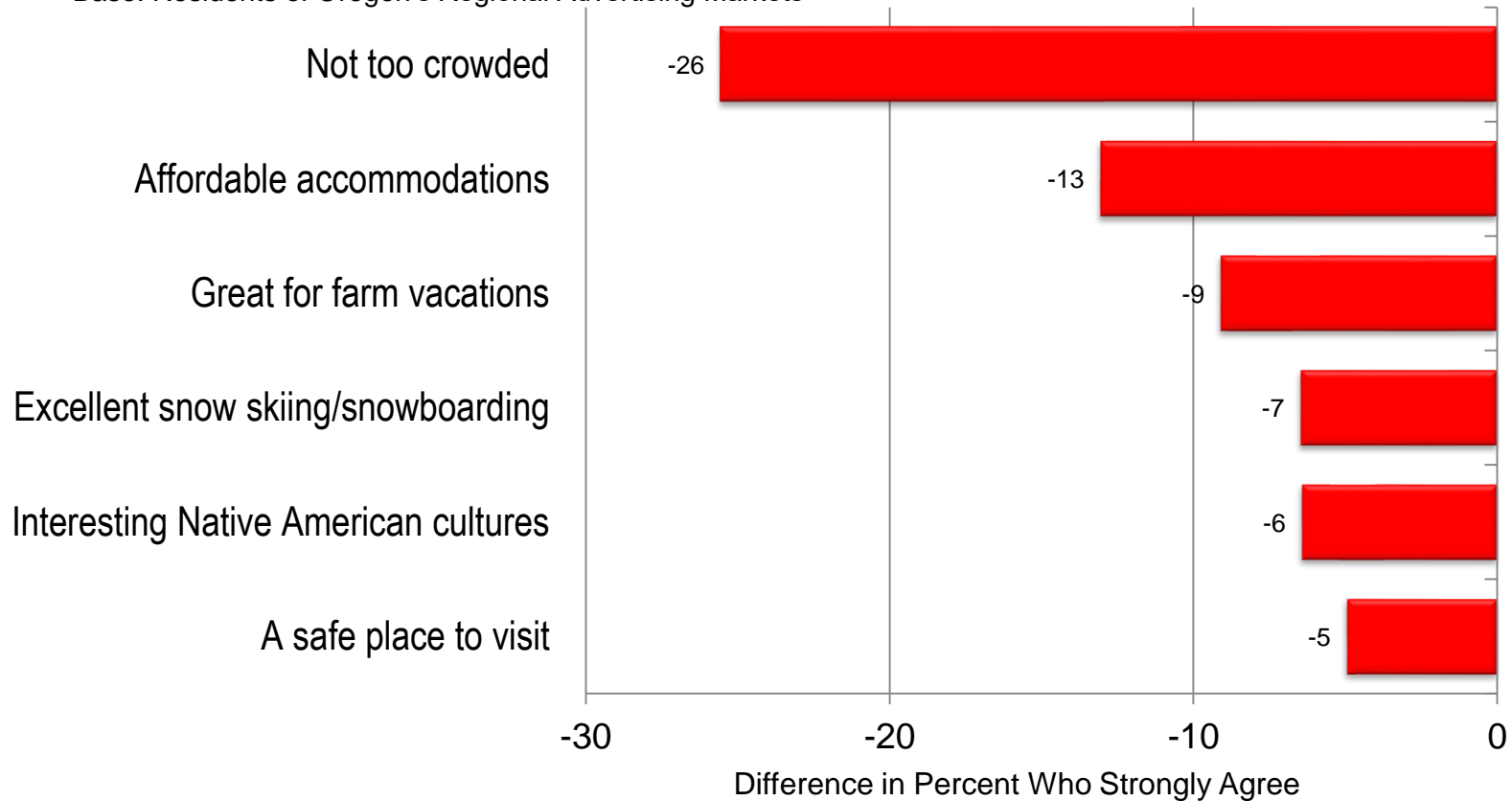
# Oregon's Image Strengths vs. Montana (Cont'd)

Base: Residents of Oregon's Regional Advertising Markets



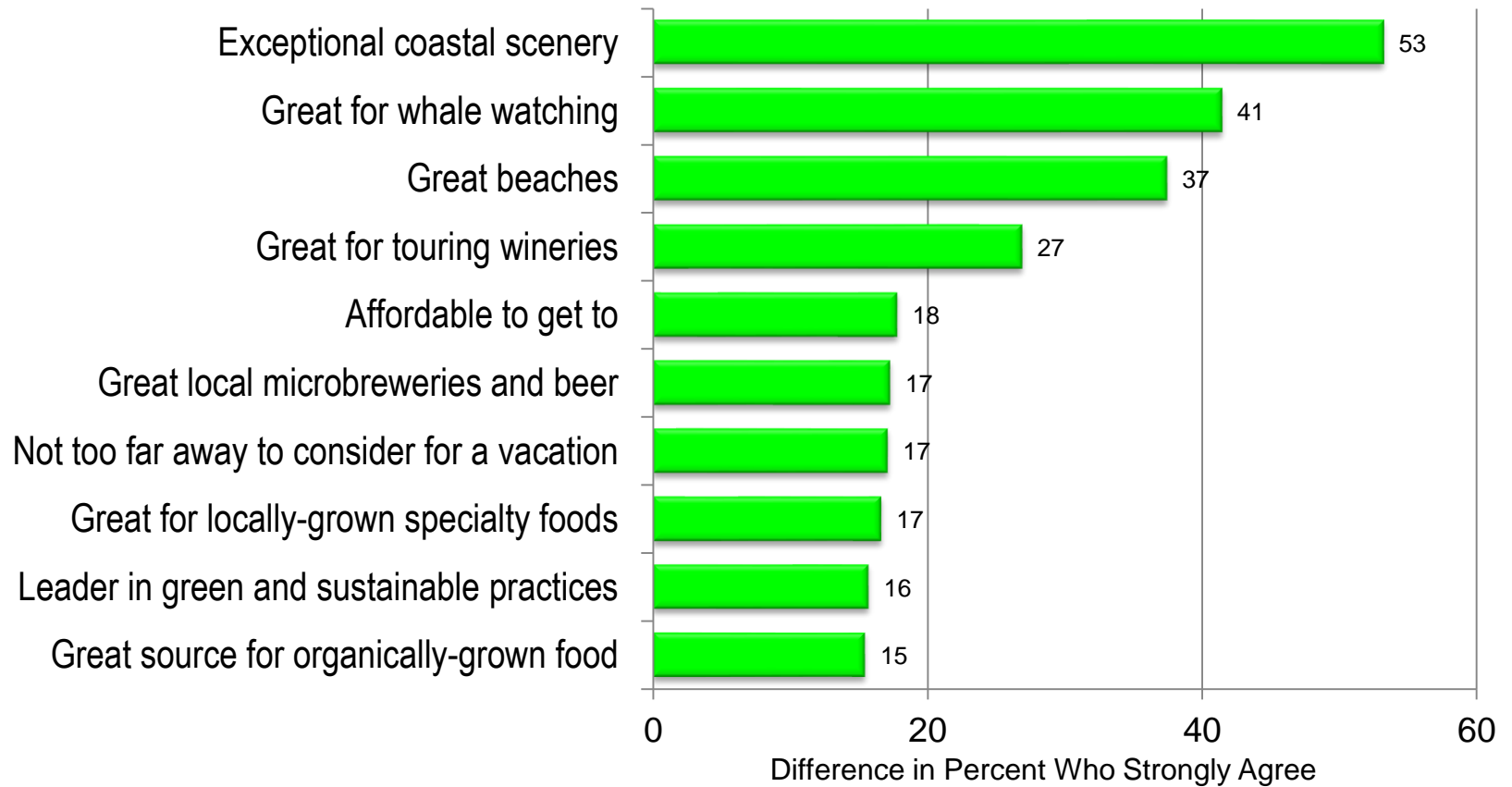
# Oregon's Image Weaknesses vs. Montana

Base: Residents of Oregon's Regional Advertising Markets



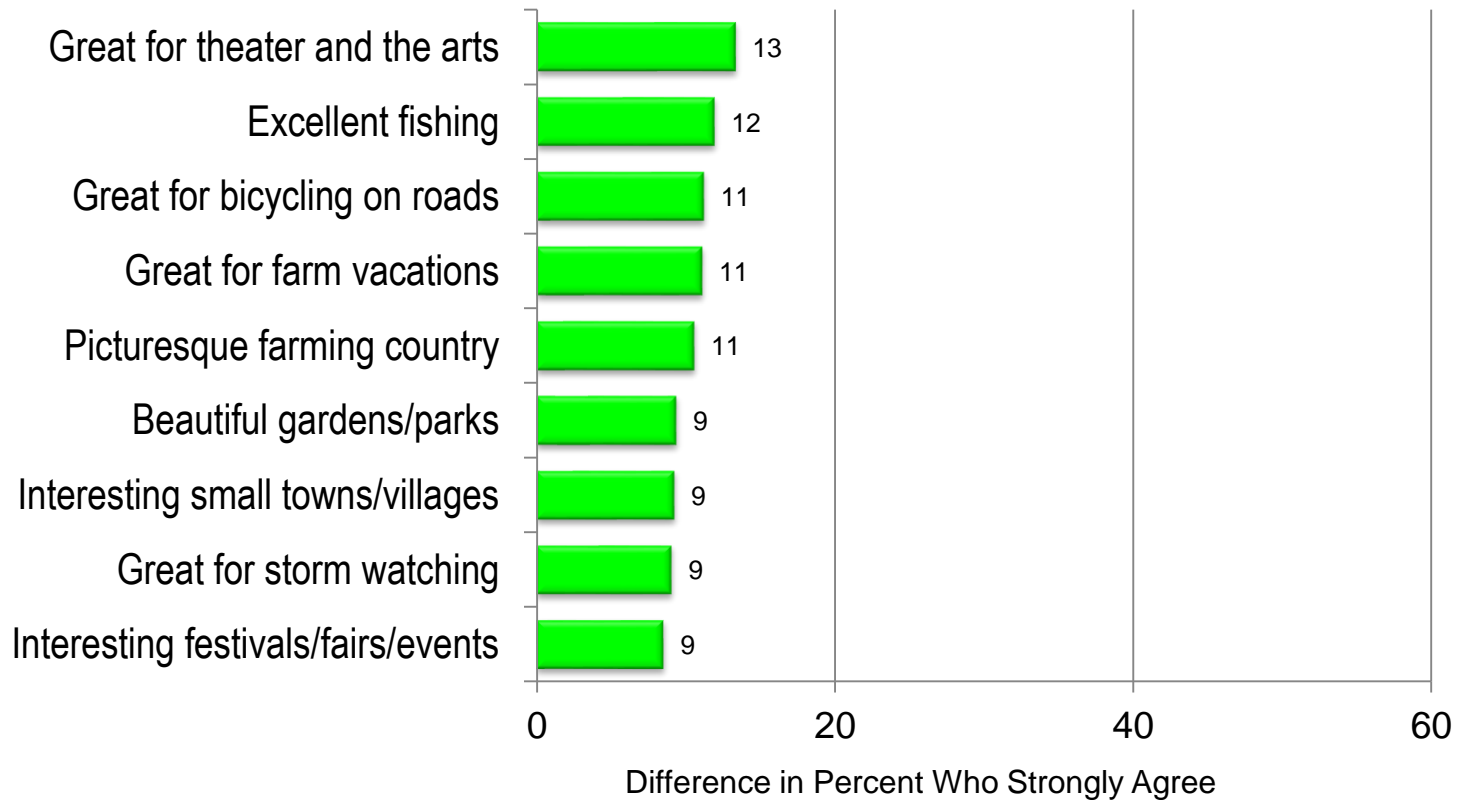
# Oregon's Image Strengths vs. Colorado

Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image Strengths vs. Colorado (Cont'd)

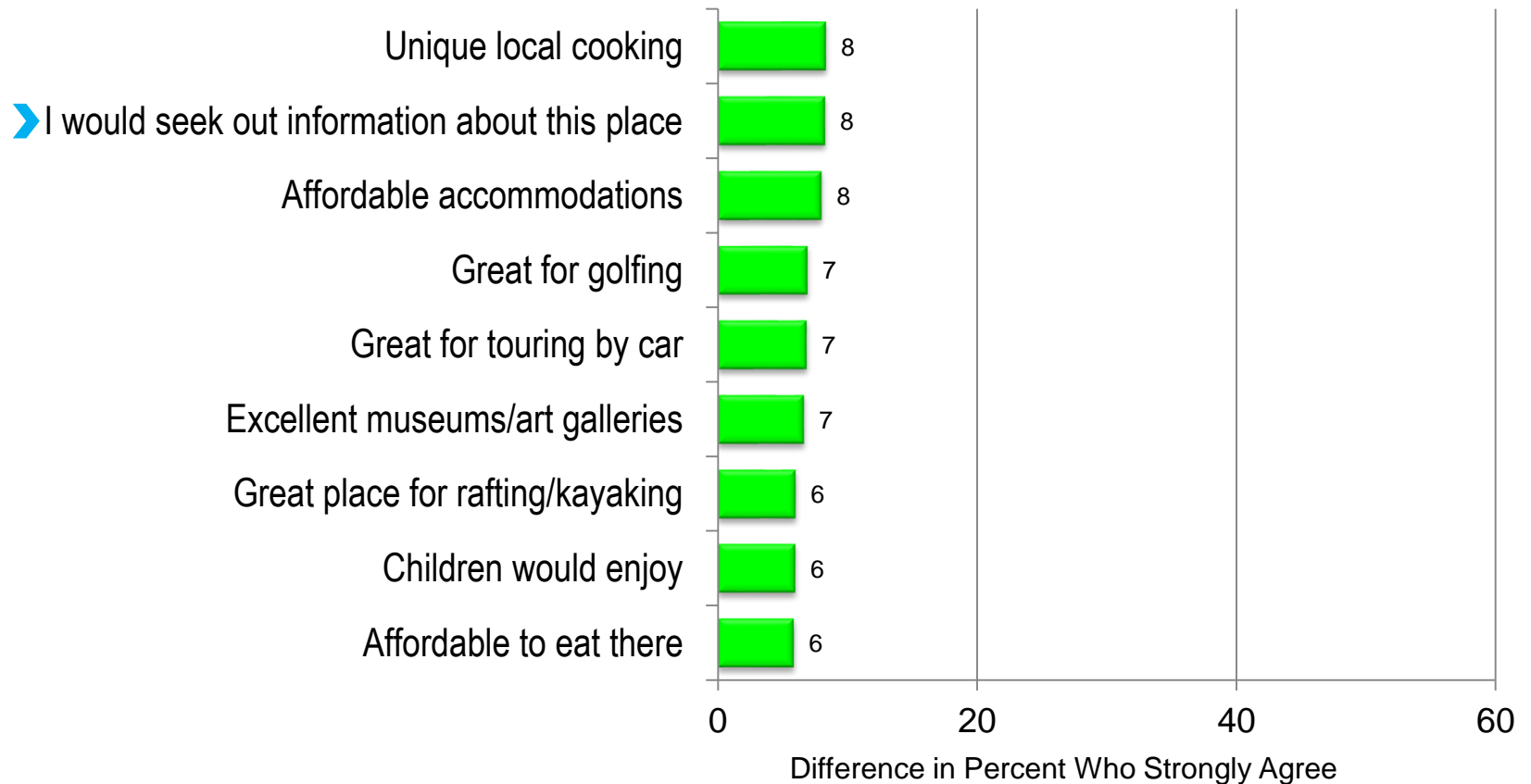
Base: Residents of Oregon's Regional Advertising Markets





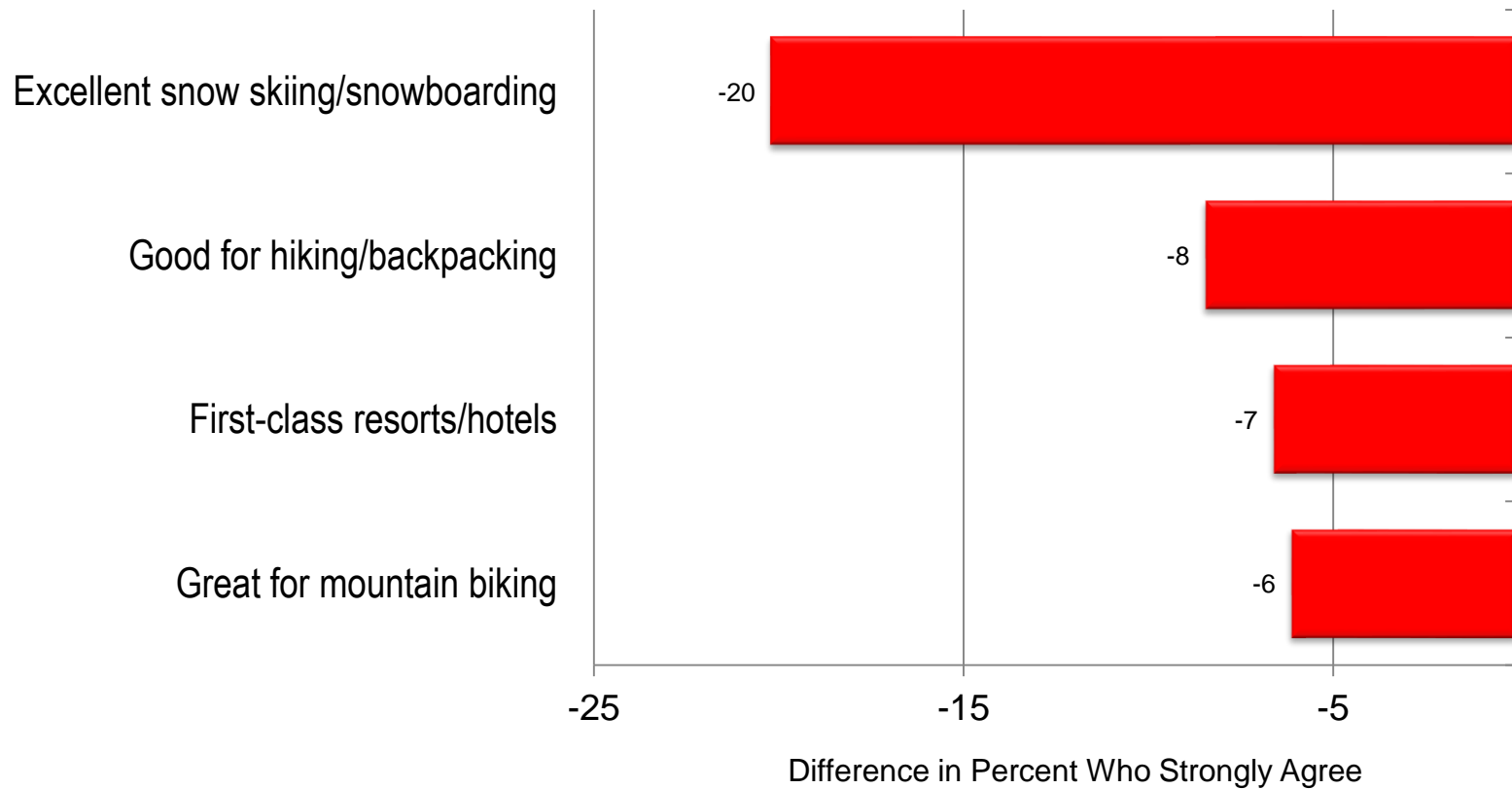
# Oregon's Image Strengths vs. Colorado (Cont'd)

Base: Residents of Oregon's Regional Advertising Markets



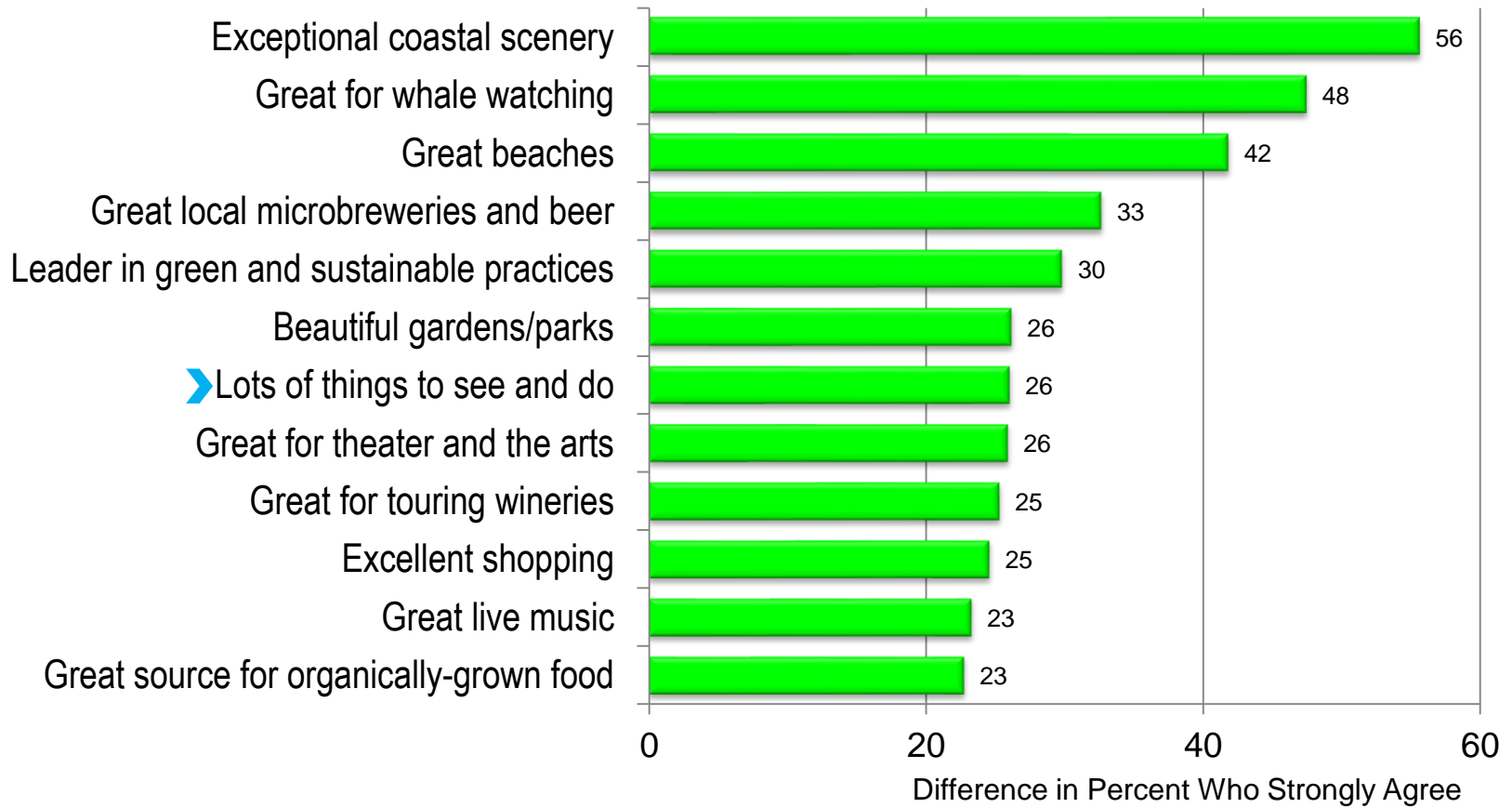
# Oregon's Image Weaknesses vs. Colorado

Base: Residents of Oregon's Regional Advertising Markets



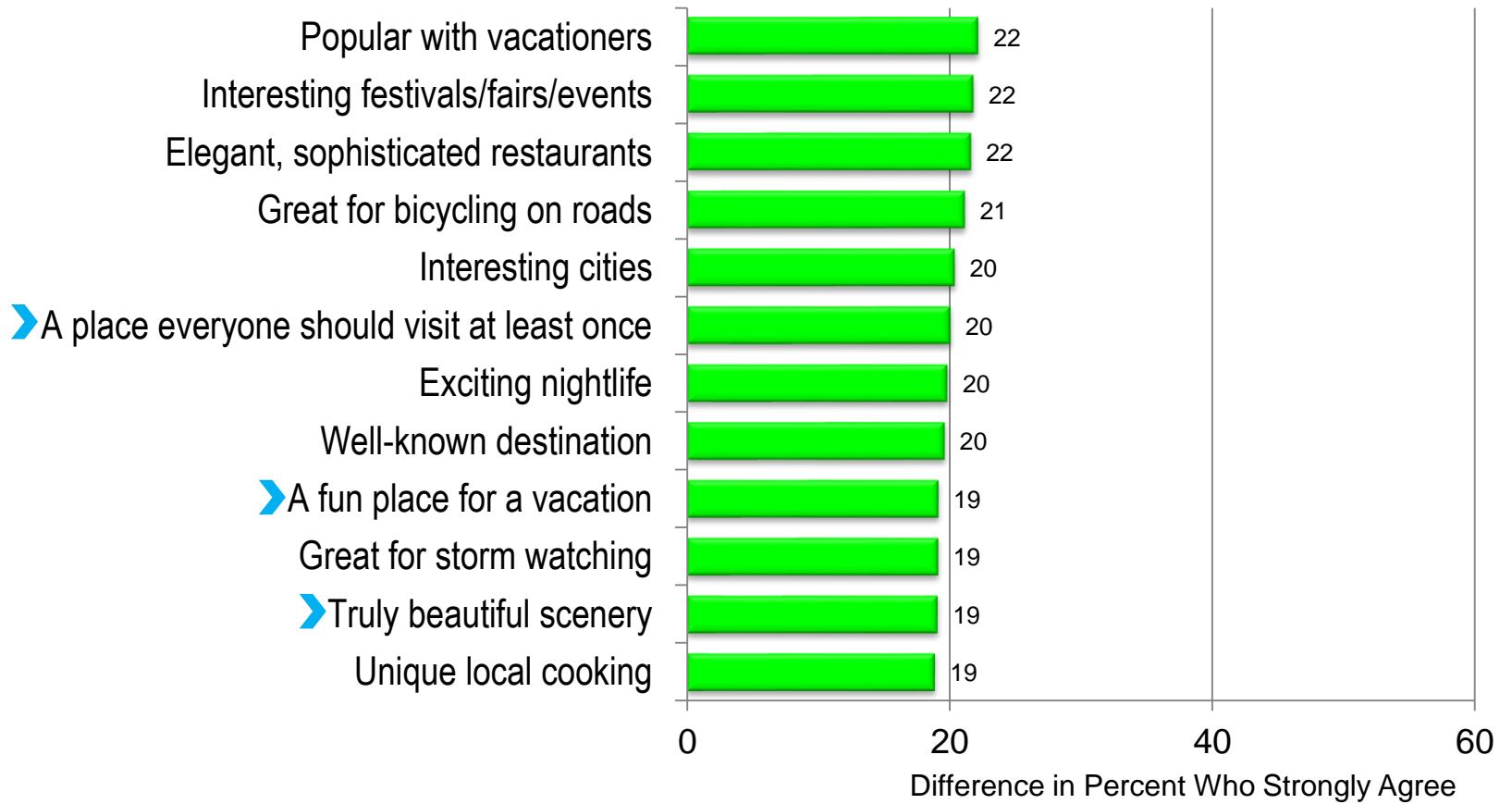
# Oregon's Image Strengths vs. Idaho

Base: Residents of Oregon's Regional Advertising Markets



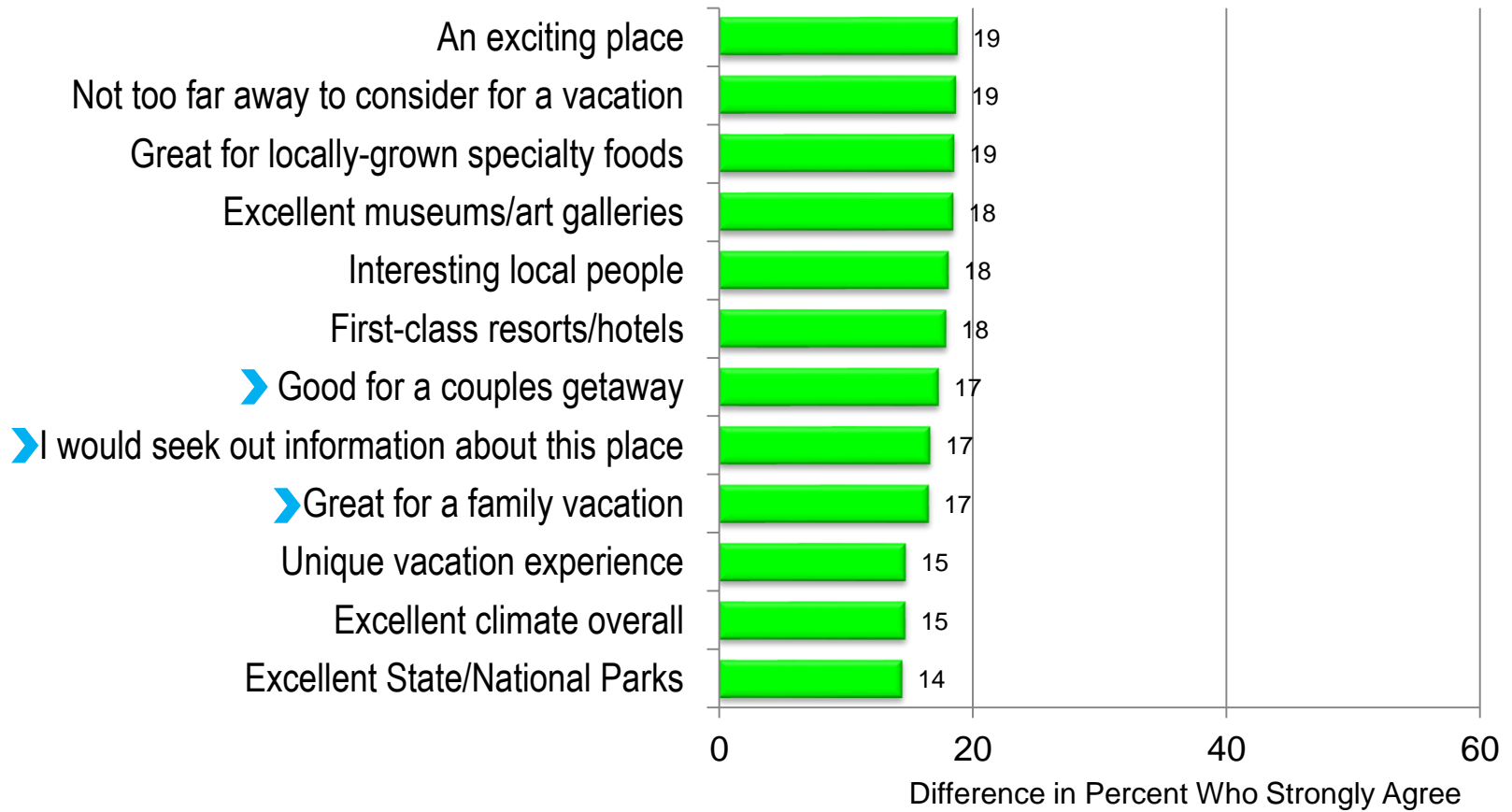
# Oregon's Image Strengths vs. Idaho (Cont'd)

Base: Residents of Oregon's Regional Advertising Markets



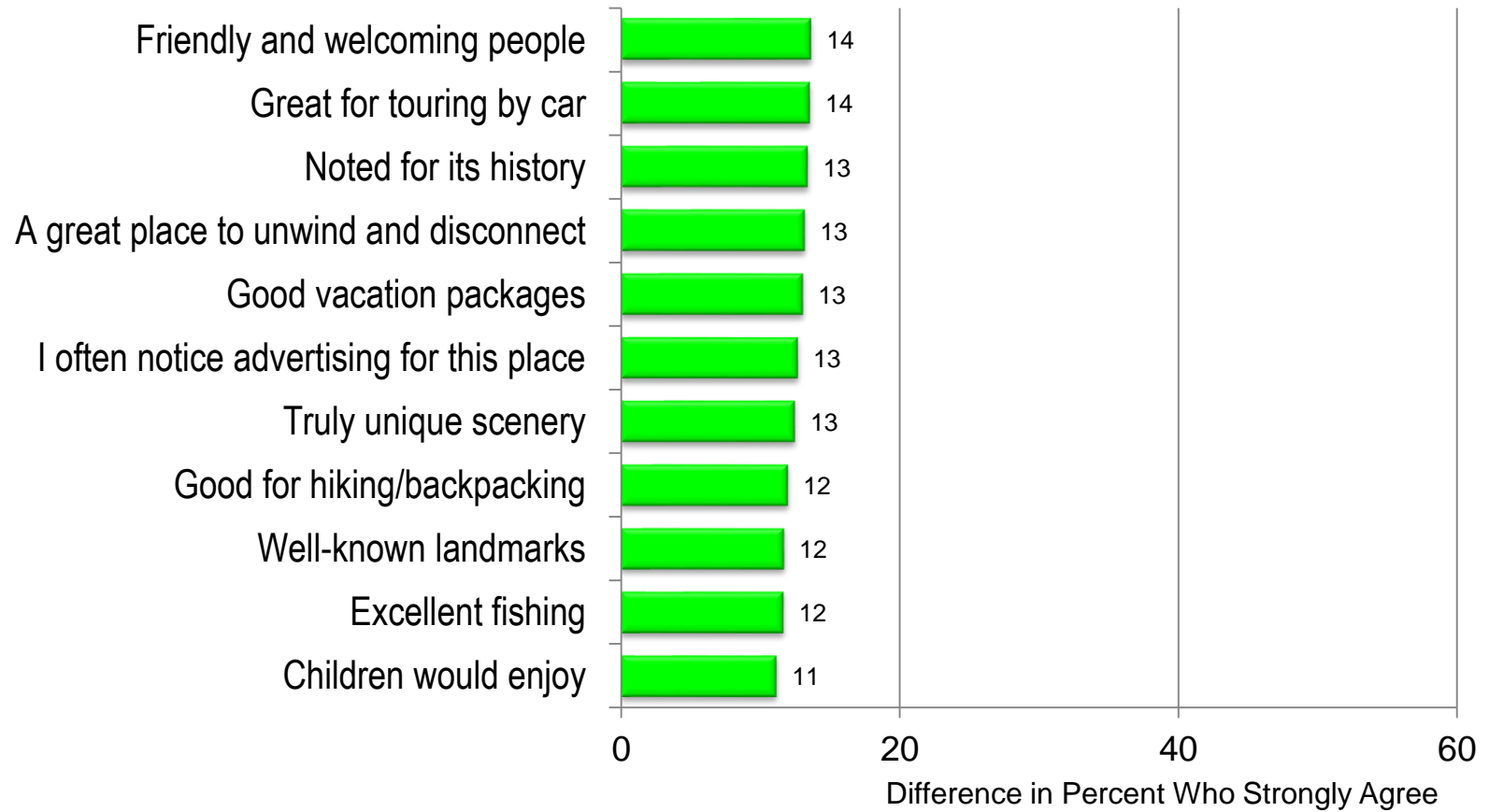
# Oregon's Image Strengths vs. Idaho (Cont'd)

Base: Residents of Oregon's Regional Advertising Markets



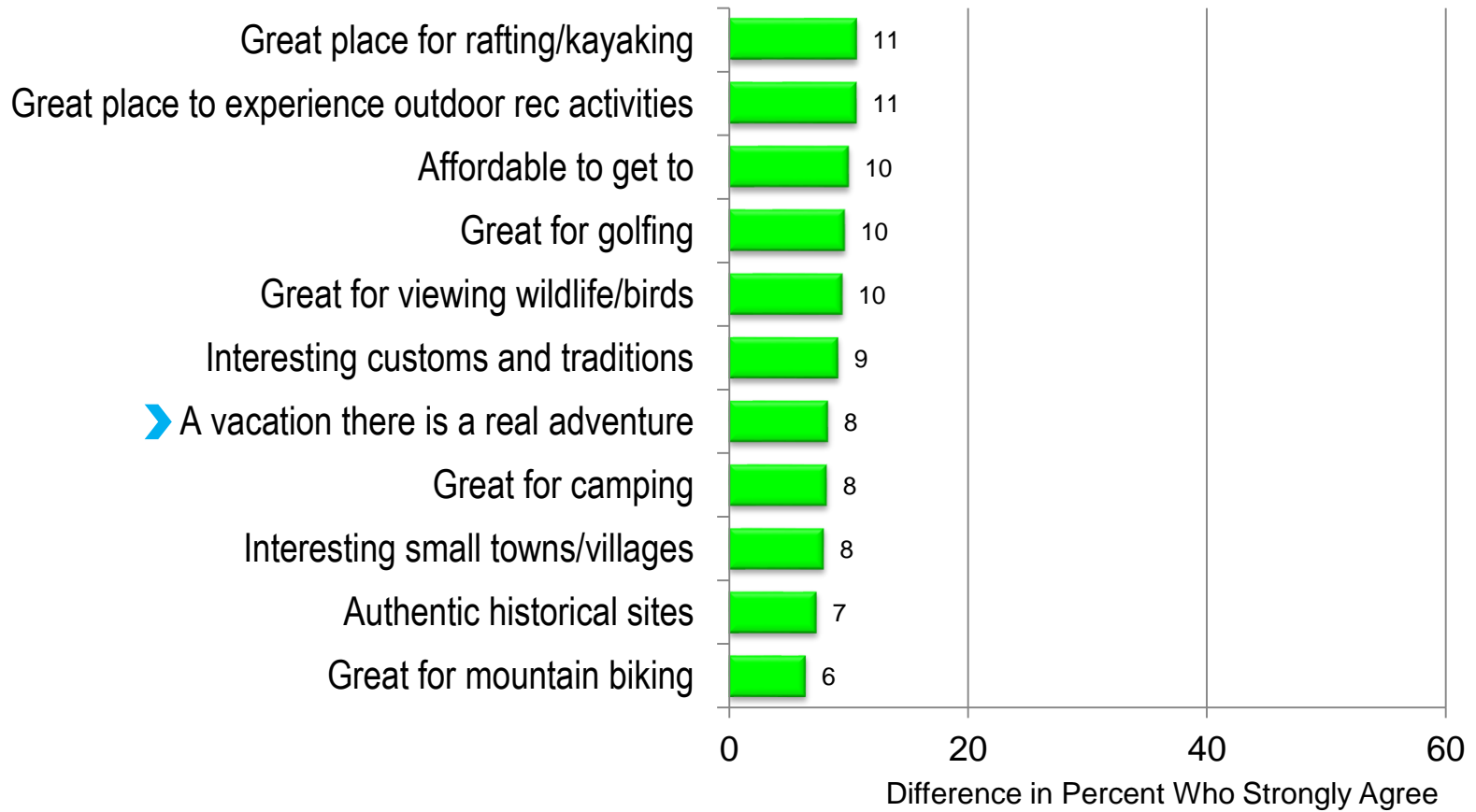
# Oregon's Image Strengths vs. Idaho (Cont'd)

Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image Strengths vs. Idaho (Cont'd)

Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image Weaknesses vs. Idaho

Base: Residents of Oregon's Regional Advertising Markets

