



Oregon
2008 Advertising
Long Term Conversion Report

Final Report
May 2010

Background



- ◉ Longwoods International has tracked the performance of Oregon's tourism advertising campaigns since 2001. Longwoods was again engaged by Travel Oregon to evaluate the state's 2008 campaign, which consisted of:
 - ❖ *Brand(Oregon Dreamer) – only in magazines*
 - ❖ *Bounty – in magazines, radio, online*
 - ❖ *365 – online*
- ◉ The ads were designed to:
 - ❖ *Promote leisure travel to Oregon*
 - ❖ *Encourage traffic to www.traveloregon.com, the state's tourism website*
- ◉ The total advertising investment in 2008 was \$1.7 M

Background



- The campaign evaluation consisted of 2 waves:
 - ❖ *A year-one wave conducted in early 2009 to assess the short-term impacts of the campaign*
 - ❖ *A Conversion Study conducted a year later to determine longer-term incremental impacts, specifically among intenders from the first wave.*
- This report provides a summary of the short-term, longer-term and combined impacts of the 2008 advertising program, with comparisons to 2004 campaign results.

Methodology



- The study was conducted via a major online consumer panel of US travelers.
 - ❖ A **traveler** is defined as a person who has taken any kind of day or overnight trip within the past 3 years, and intends to take a trip within the next two years
 - ❖ A total of **1,451** travelers participated in the study



Creative

Brand Dreamer Print



Eric Colman, Columbia River Gorge

THE BOOK OF OREGON



THE OREGON DAREDEVIL

A PERSON WHO THINKS SOMETHING CAN BE DONE THAT SEEMS DOWNRIGHT CRAZY UNTIL THAT PARTICULAR NOTION BECOMES THE LATEST SENSATION. THEN, NOT SO CRAZY.

Let me tell you about a woman from the planet *Why Not?* She came here on a ship called *I-Dare-You* in a suit made of neoprene. Now, this girl was always pretty good at sports. But there was no preparing the world for what she would do when she landed in a very peculiar part of Planet Earth called Oregon.

It started with a mighty river, one of the mightiest in the world, and some steep rock cliffs that funnel the wind into the river in a very powerful way. Then there was a general lack of consideration for conventional wisdom. Or wisdom, period. This is an affliction that often afflicts Oregonians, sometimes resulting in new and unconventional outdoor activities that subsequently sweep the nation and the planet.

And this is roughly how the sport of kiteboarding came to be. But not before the pool-poolers and naysayers and skeptics and chickens had their say about how it's crazy and dangerous and ridiculous and it will never catch on. But, like windsurfing and whitewater kayaking and snowboarding and lots of other things that people like to do in Oregon, rolling your eyes at the naysayers is just part of the fun of being in a place with a landscape so extreme, so breathtaking and dramatic, people can't stop inventing sports that are also extreme, breathtaking and dramatic.

So, if you think it might be fun to risk life and limb in the Columbia River Gorge or, better yet, to sit on a sun-baked deck with the breeze in your hair and a pint of amber ale in your hand and watch other people risk life and limb in the Columbia River Gorge, you're invited to start planning your Gorge getaway at www.traveloregon.com or by calling 1-800-547-7842.

OREGON. WE LOVE DREAMERS.™



365 extraordinary
days
in Oregon

start scheming a
little summer trip
at traveloregon.com

Bounty Print & Online



Everybody sing along, "Ninety-nine bottles of wine..."

OREGON BOUNTY OCT 1 - NOV 30 2009

The famous wines of Oregon are just the tip of the proverbial iceberg. This fall, you're invited to make a weekend of it, sampling Oregon's artisan spirits, microbrews and a plethora of fresh, local cuisine during our annual gastronomic extravaganza, Oregon Bounty. Start planning your trip at traveloregon.com/bounty or by calling 800.547.7842.

**PLAN YOUR
CENTRAL
OREGON
BEER-LOVER'S
ESCAPE
NOW**

**OREGON
BOUNTY
OCT 1 -
NOV 30**

**PLAN A COCKTAIL-
LOVER'S GETAWAY**

**OREGON BOUNTY
OCT 1 - NOV 30**

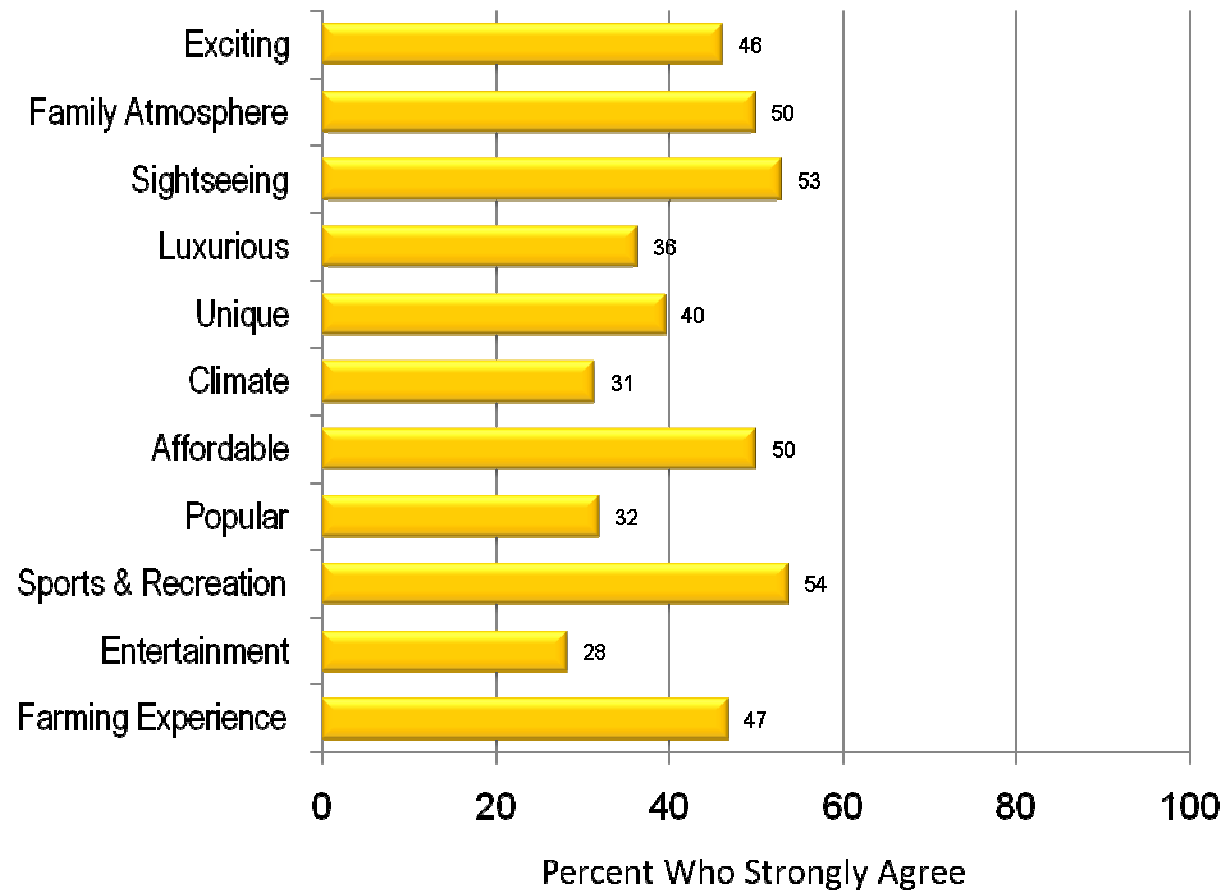
MAIN FINDINGS

Oregon's Image vs. the Competition

Oregon's Overall Image



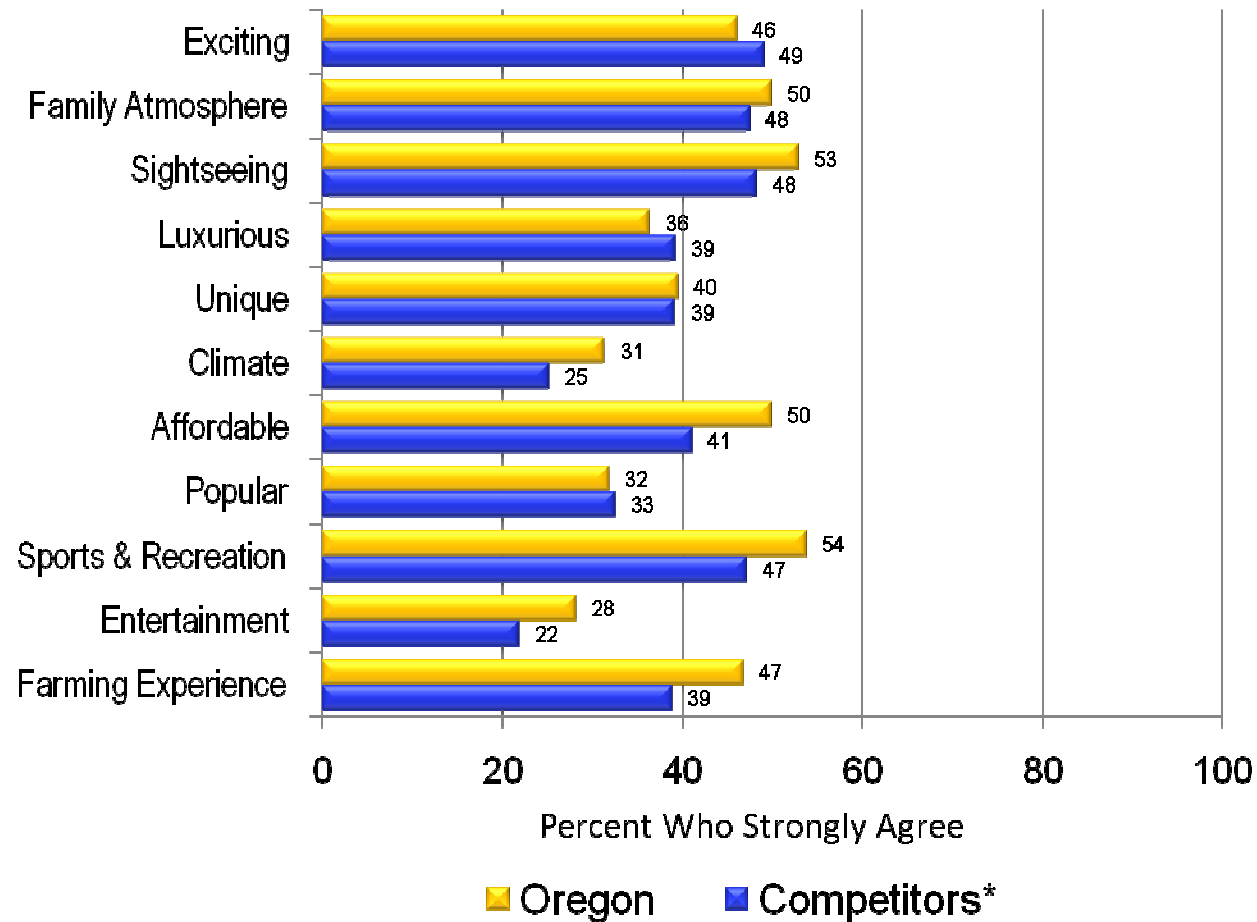
Base: Residents of Oregon's Regional Advertising Markets



Oregon's Overall Image vs. The Competition



Base: Residents of Oregon's Regional Advertising Markets

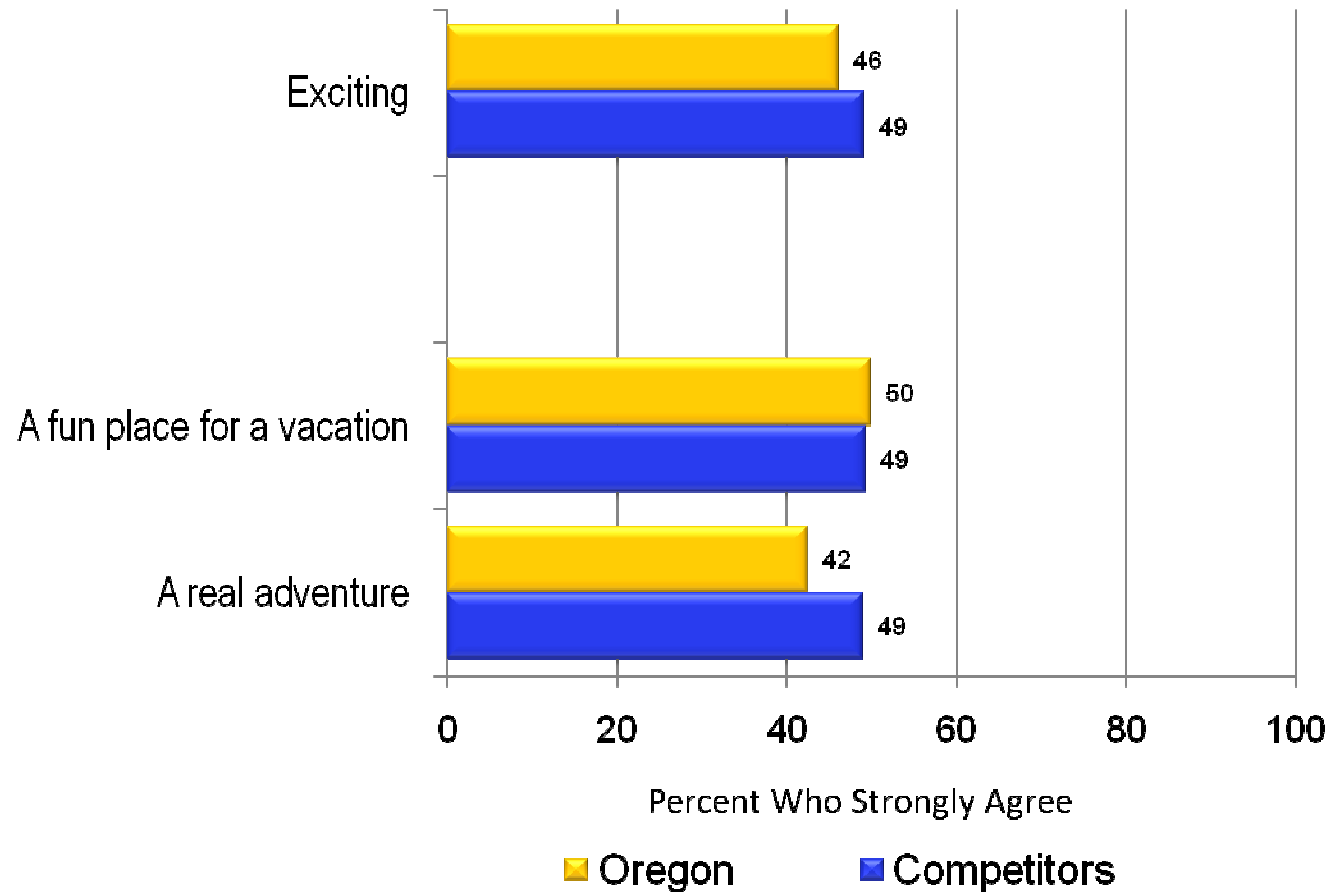


* Competitors include: Idaho, Washington State, British Columbia, Colorado and Montana

Oregon's Image vs. The Competition — Exciting



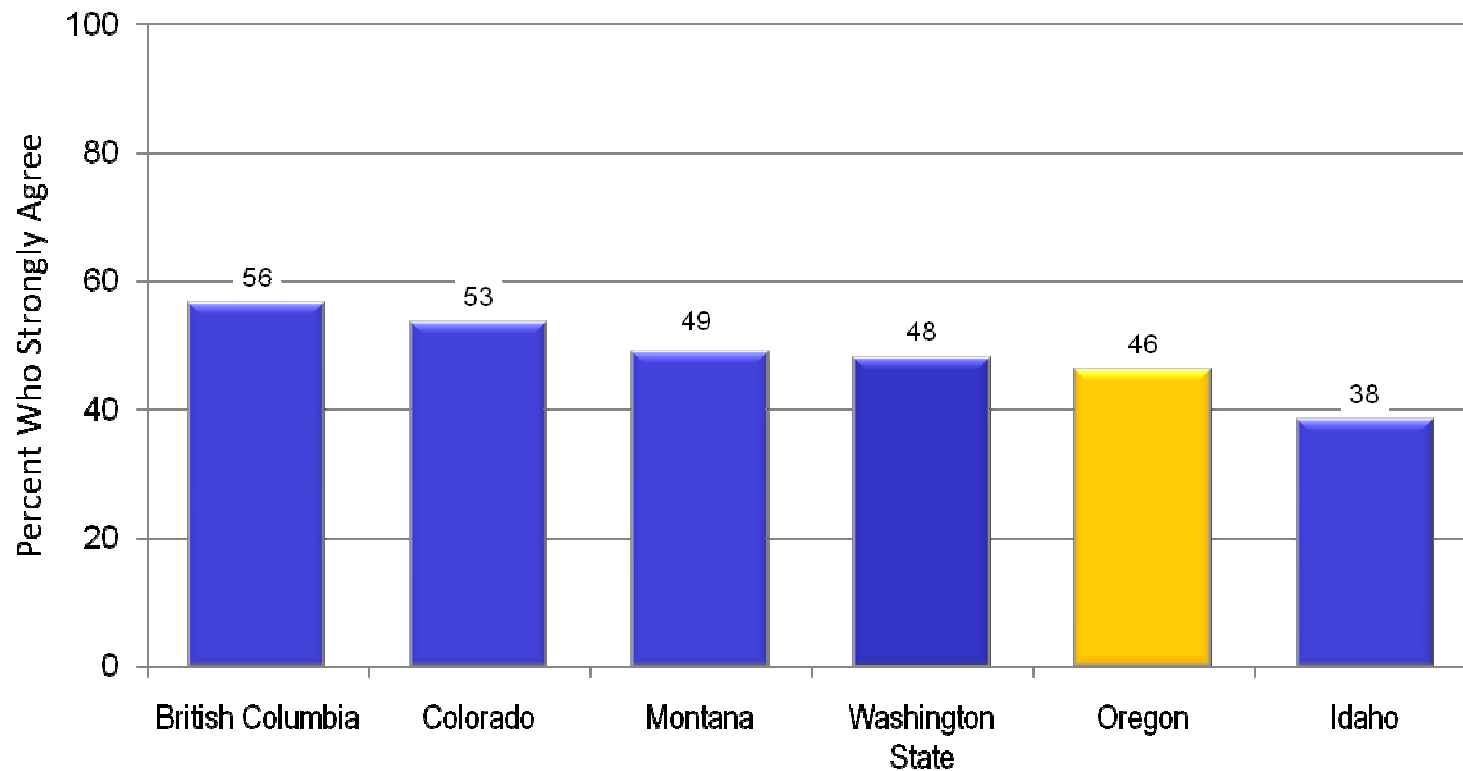
Base: Residents of Oregon's Regional Advertising Markets



Oregon's Image vs. the Competition — Exciting



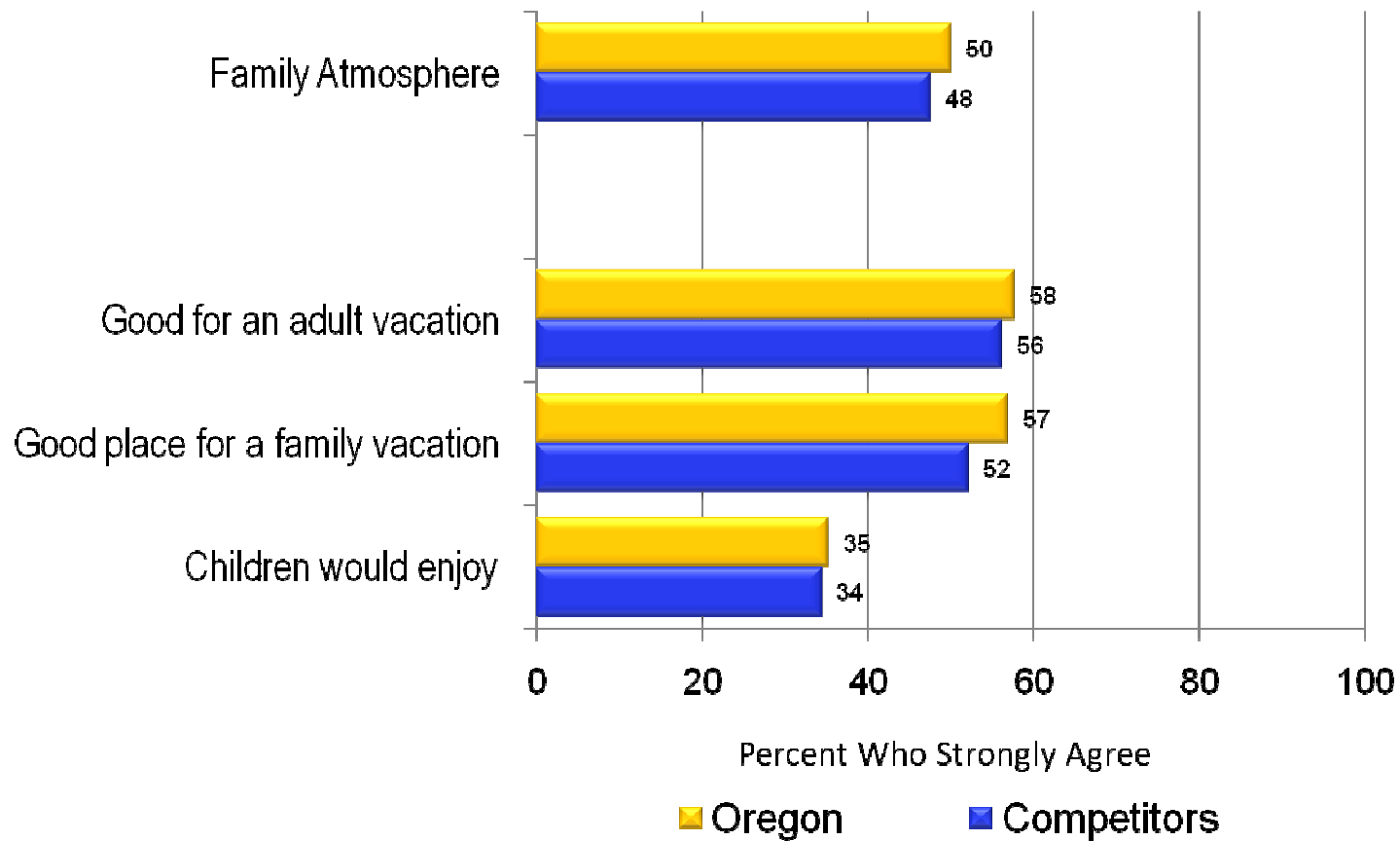
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Oregon's Image vs. The Competition — Family Atmosphere



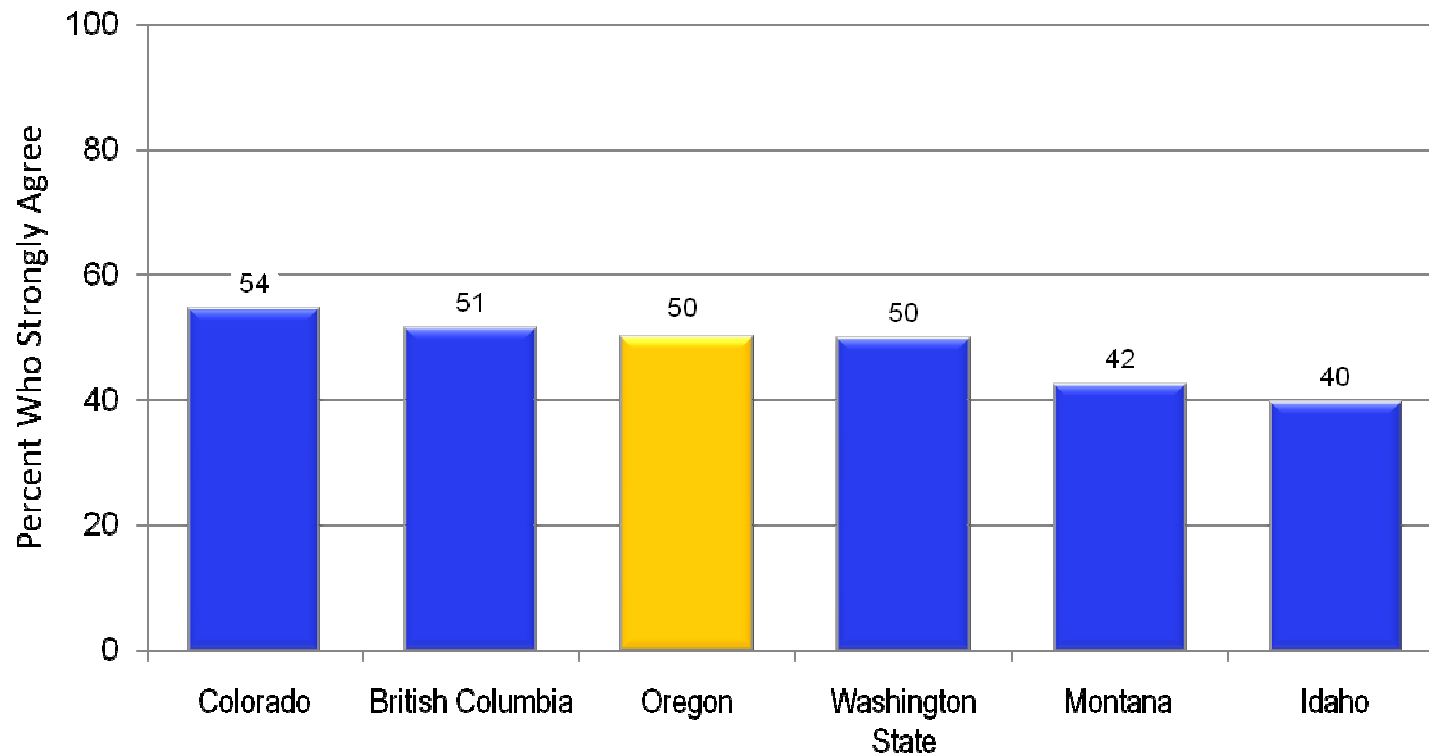
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Oregon's Image vs. the Competition — Family Atmosphere



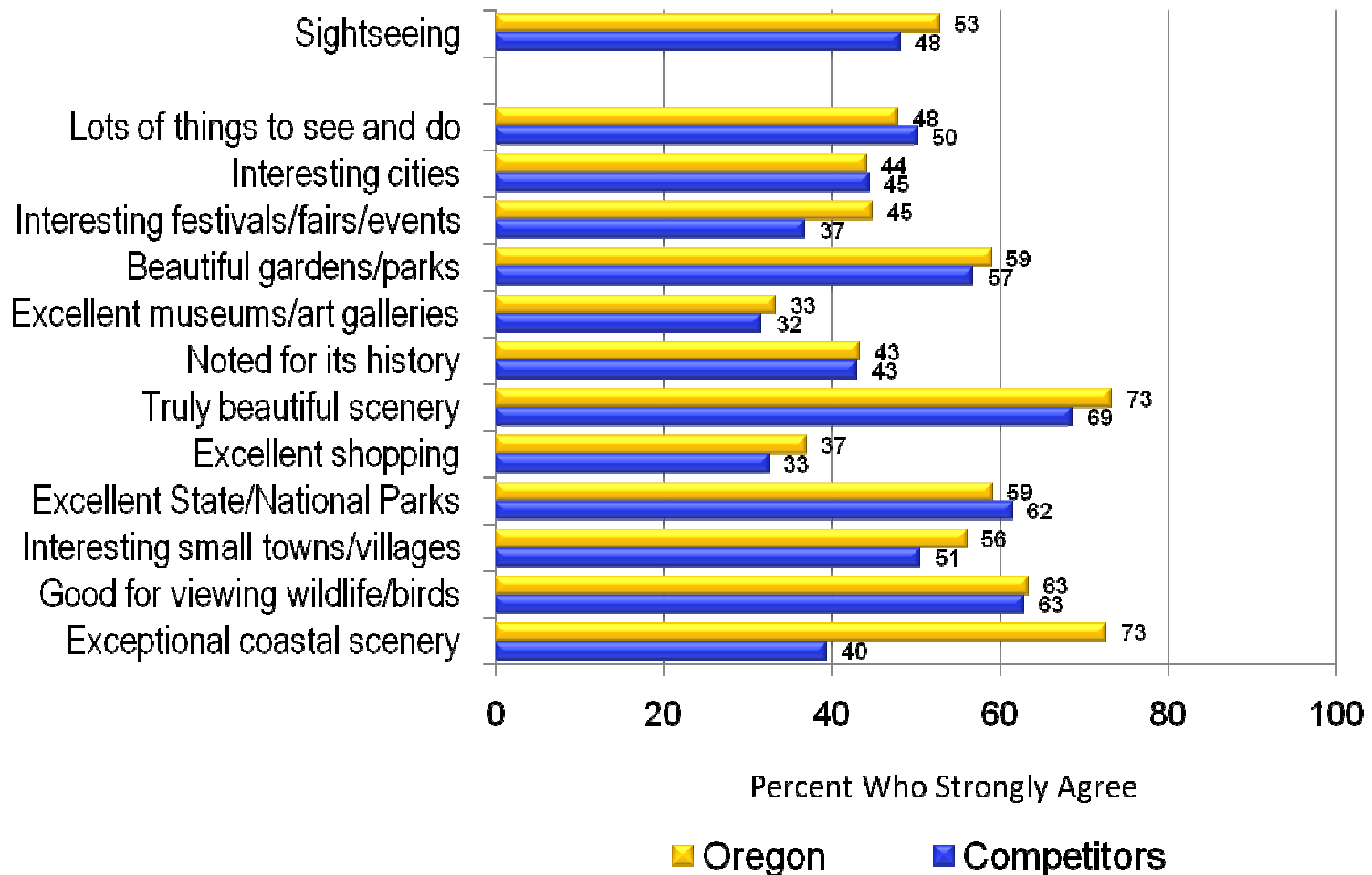
Base: Residents of Oregon's Regional Advertising Markets



Oregon's Image vs. The Competition — Sightseeing



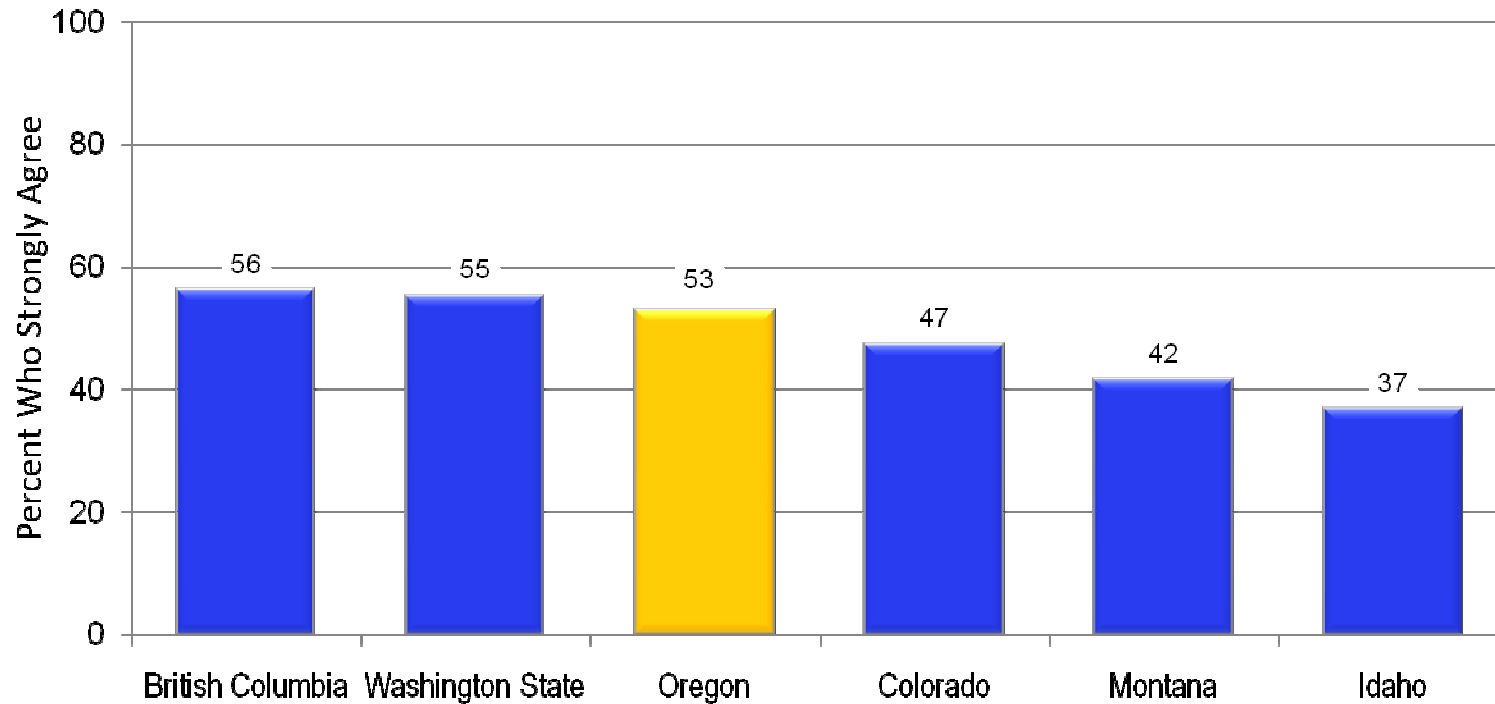
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Oregon's Image vs. the Competition — Sightseeing



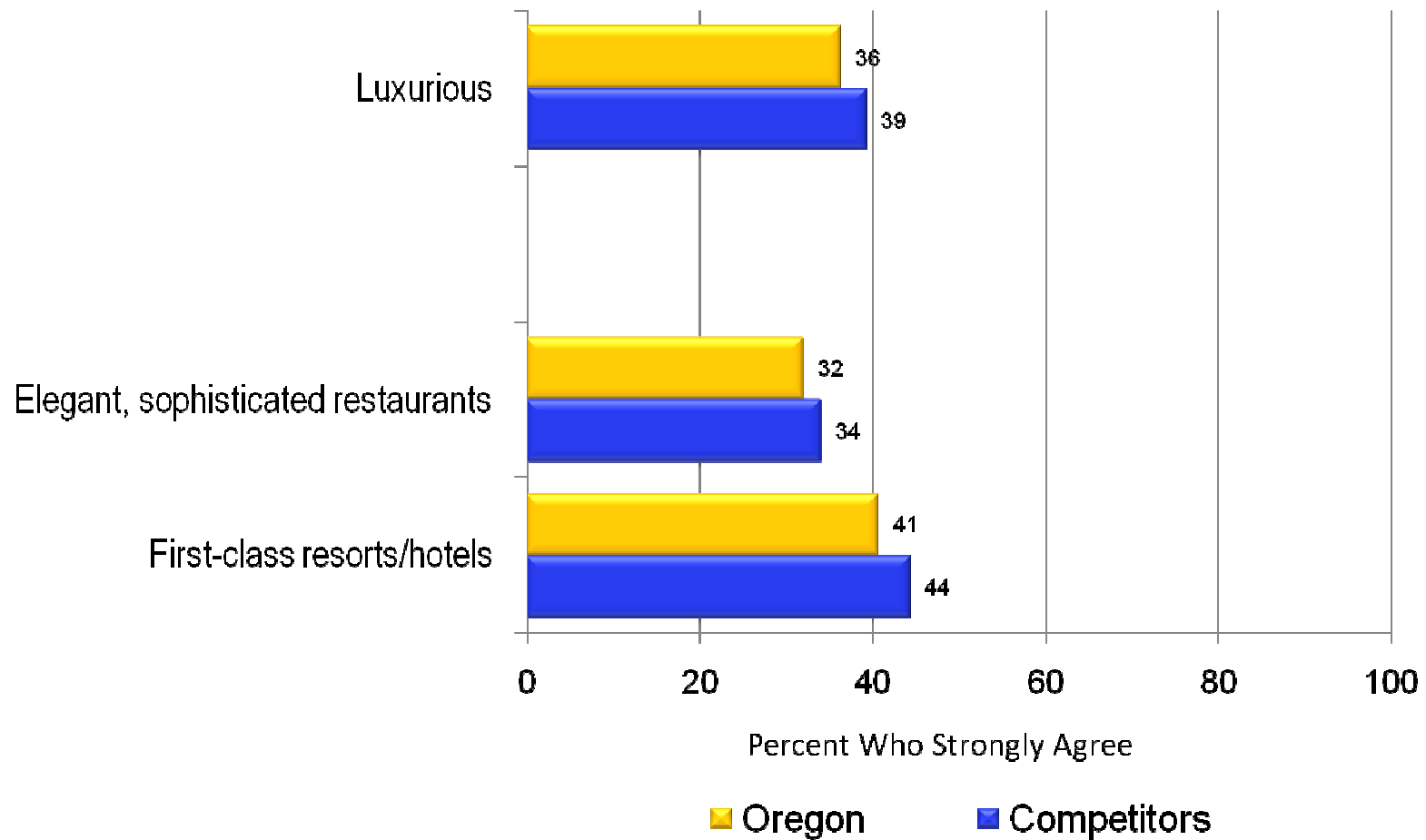
Base: Residents of Oregon's Regional Advertising Markets



Oregon's Image vs. The Competition — Luxurious



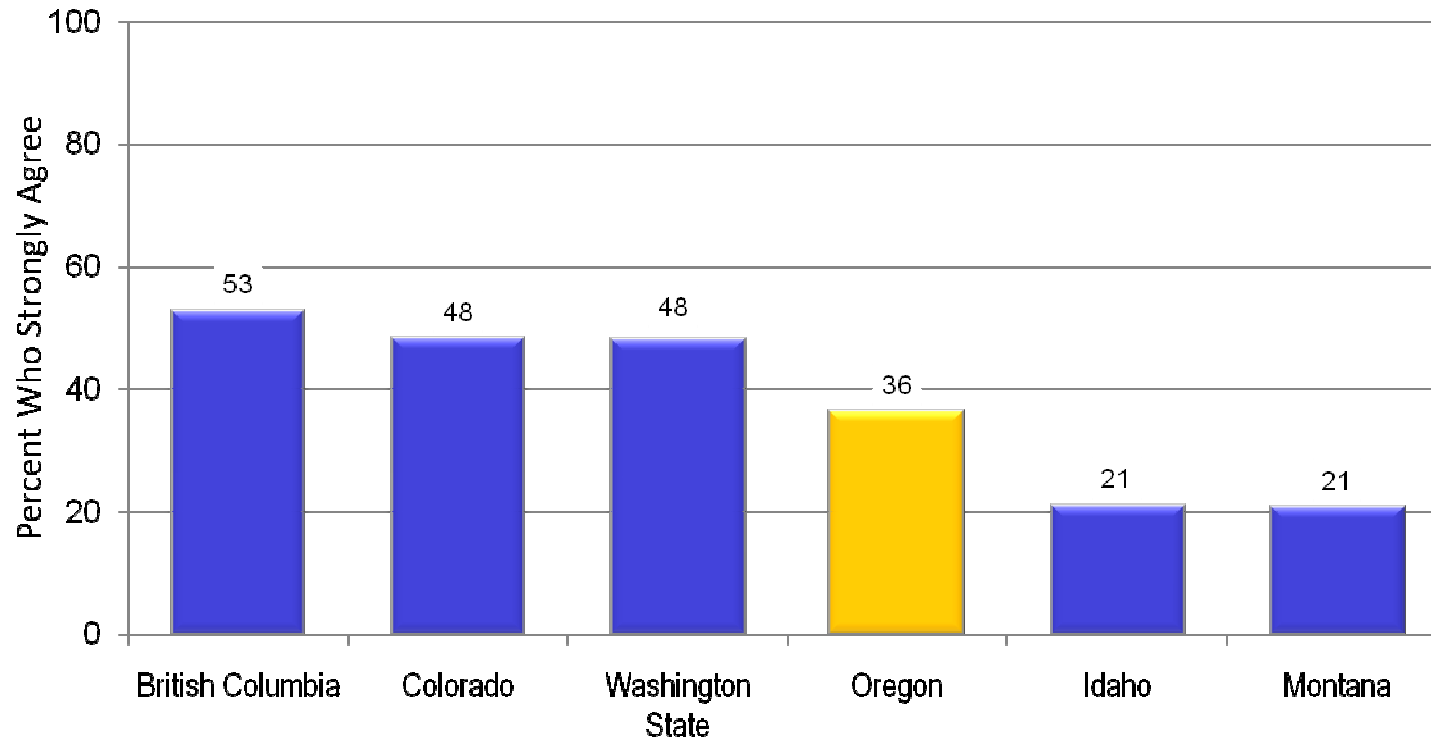
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Oregon's Image vs. the Competition — Luxurious



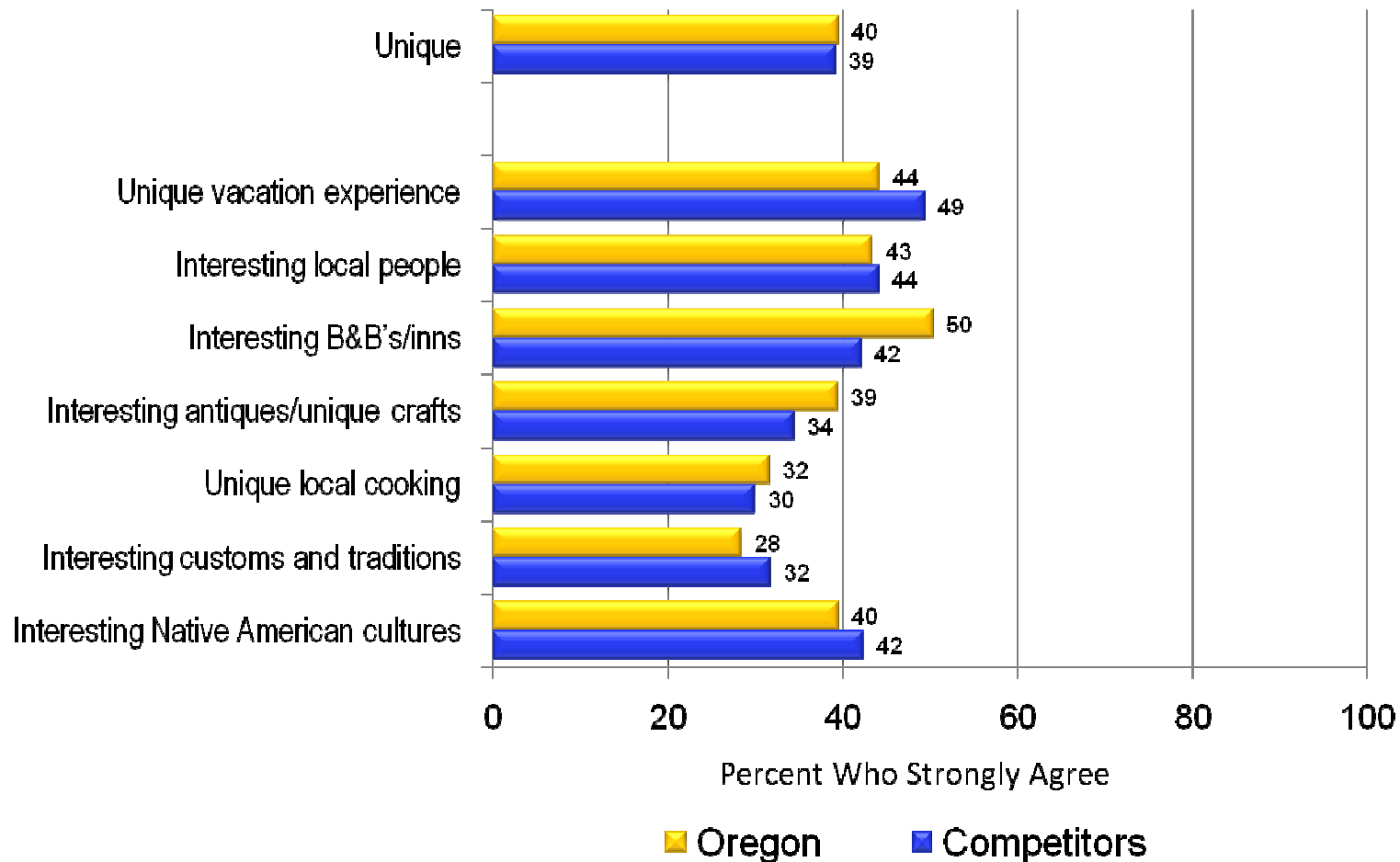
Base: Residents of Oregon's Regional Advertising Markets



Oregon's Image vs. The Competition — Unique



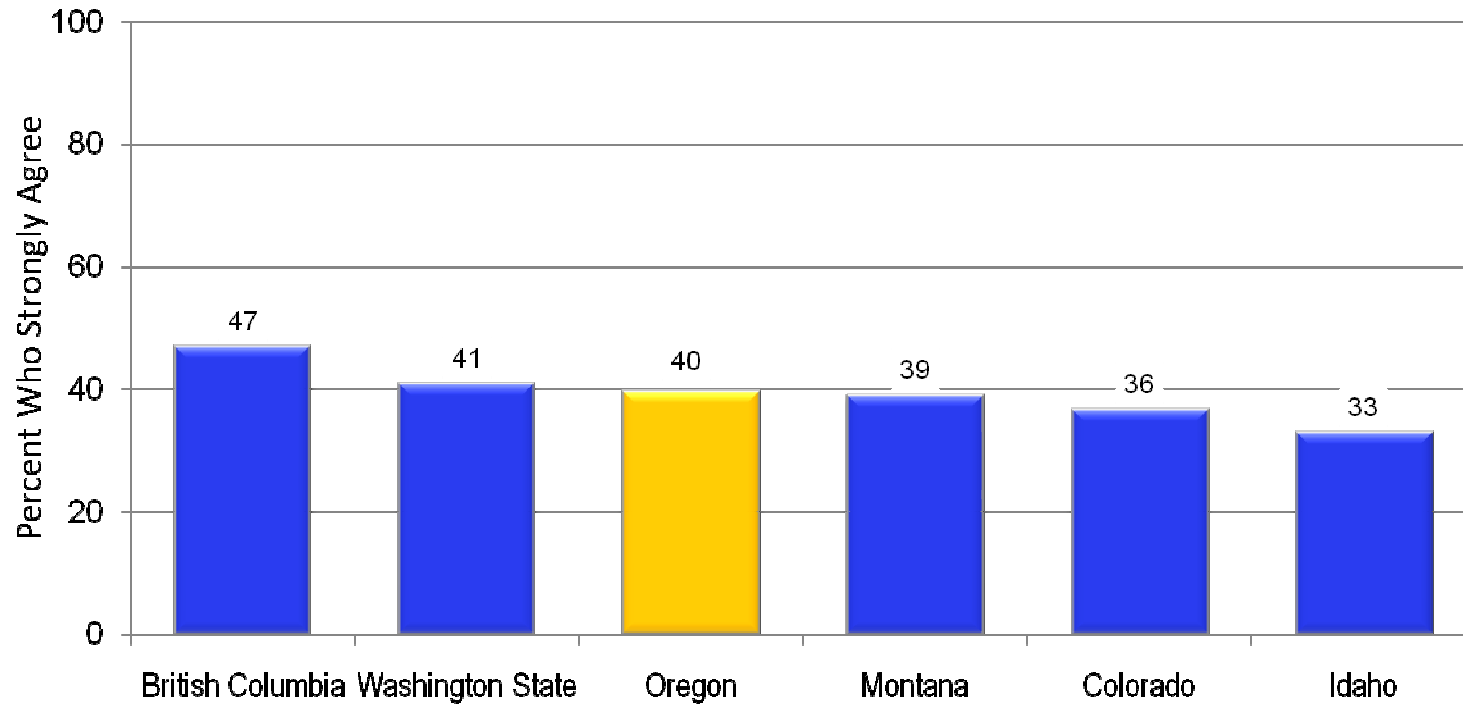
Base: Residents of Oregon's Regional Advertising Markets



Oregon's Image vs. the Competition — Unique



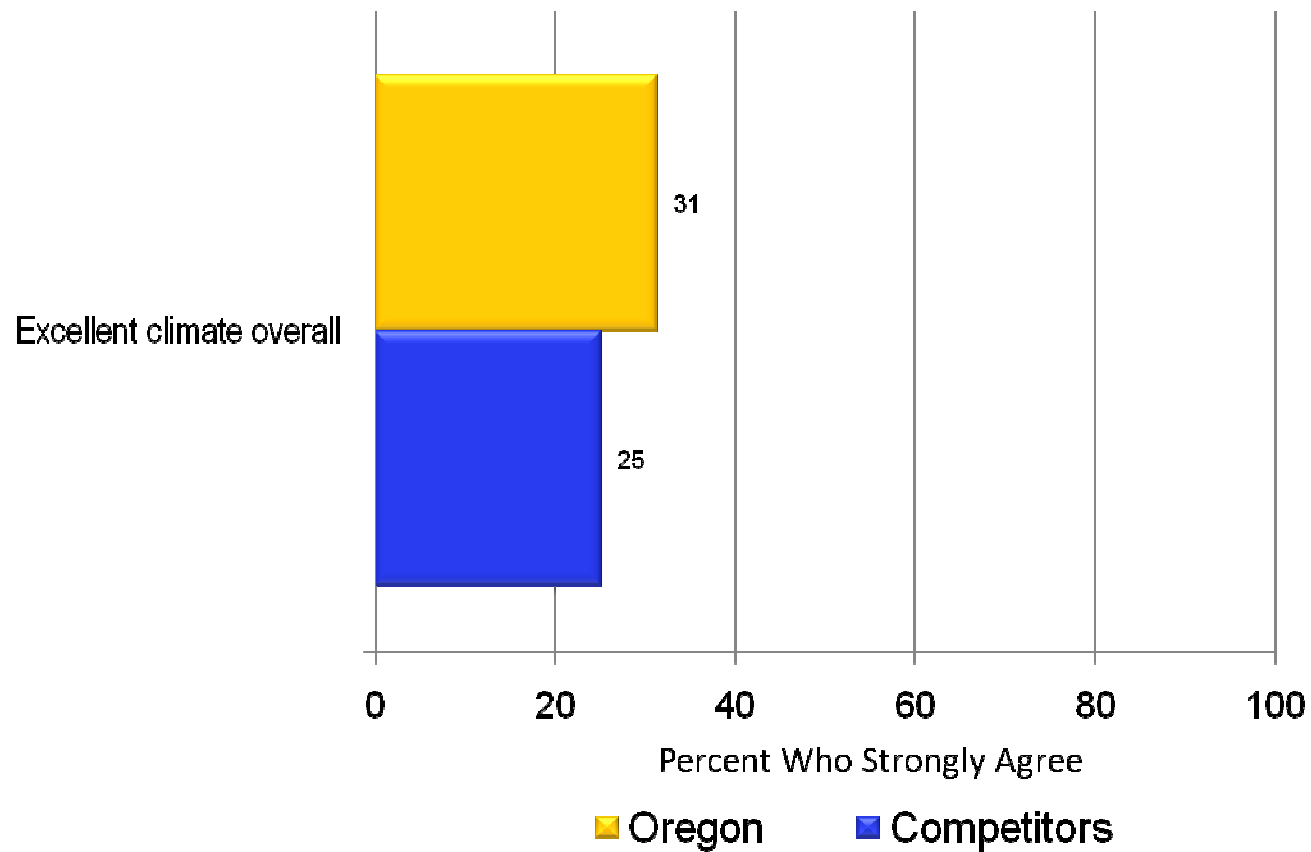
Base: Residents of Oregon's Regional Advertising Markets



Oregon's Image vs. The Competition — Climate



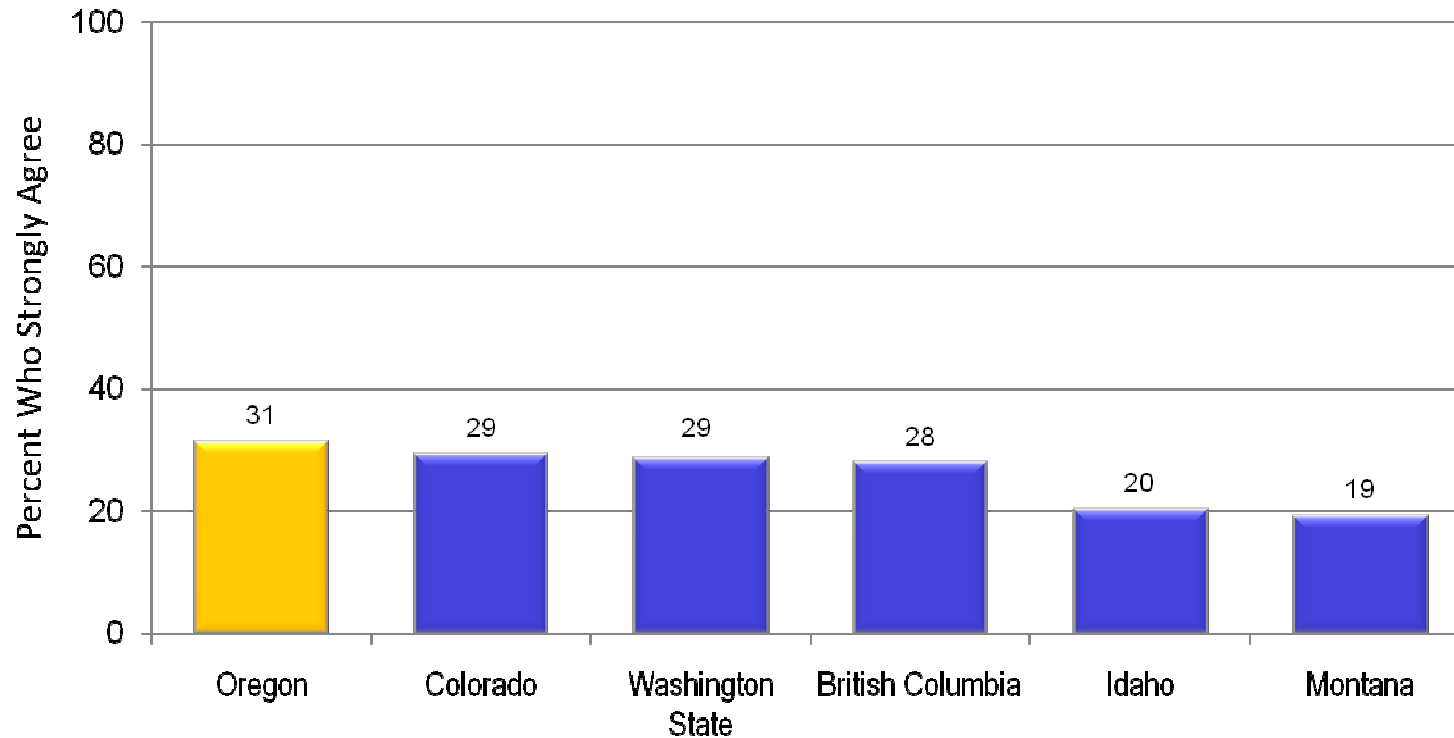
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Oregon's Image vs. the Competition — Climate



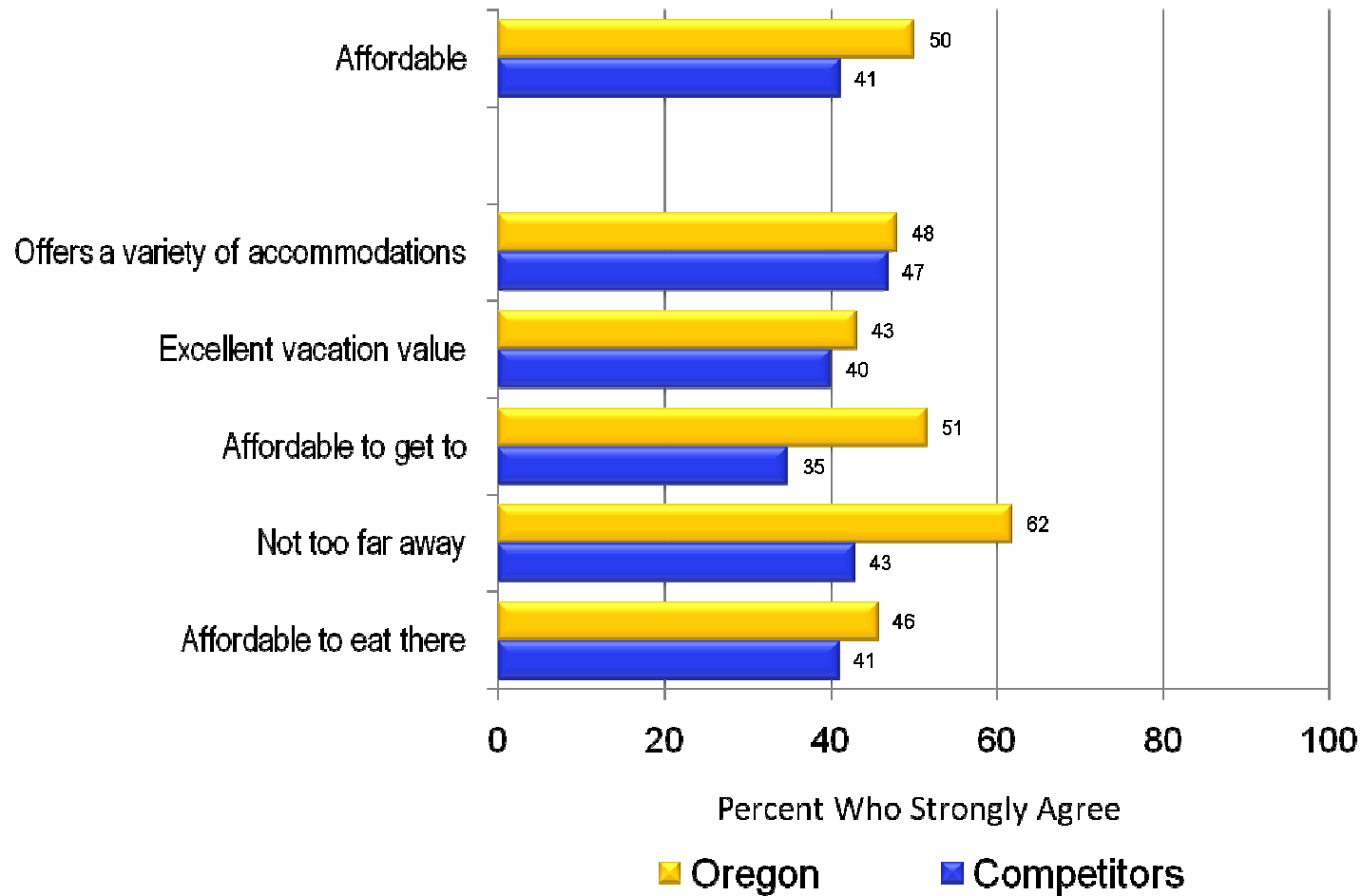
Base: Residents of Oregon's Regional Advertising Markets



Oregon's Image vs. The Competition — Affordable



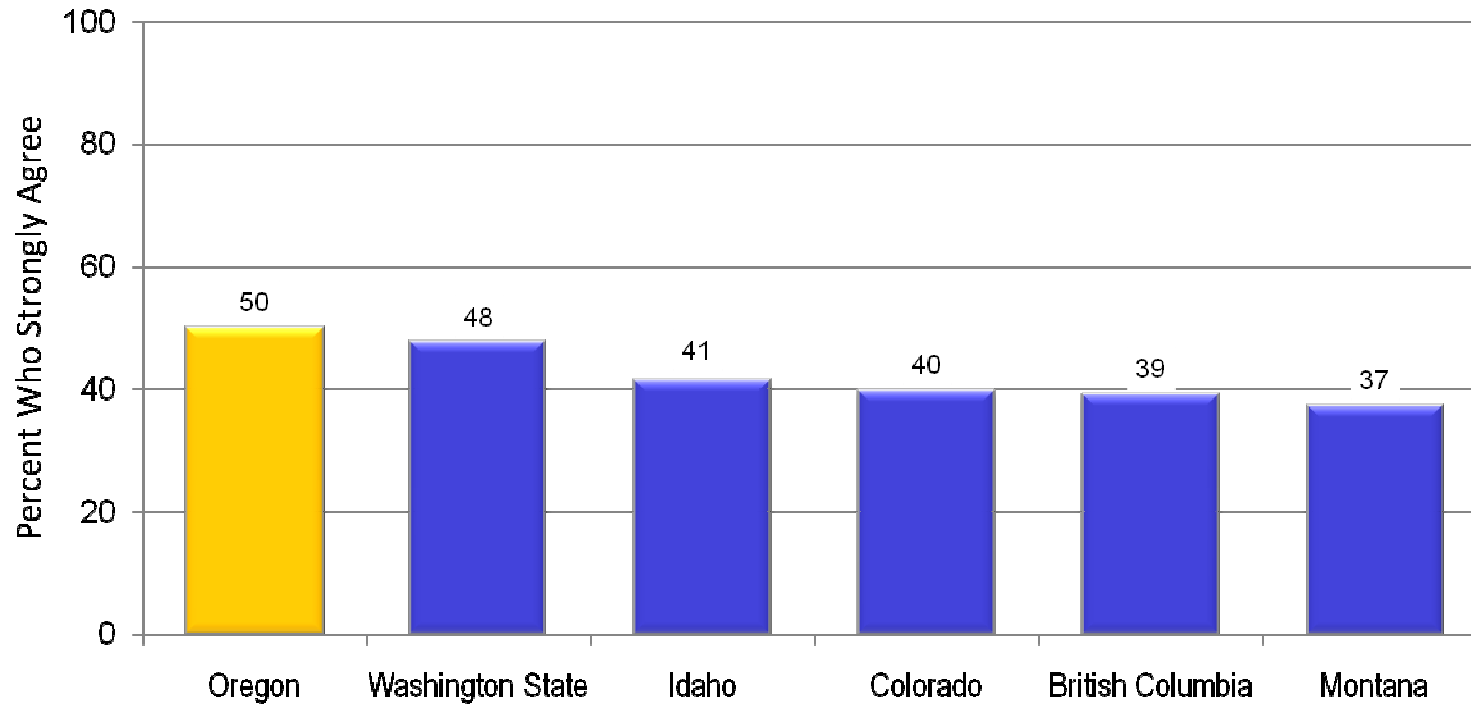
Base: Residents of Oregon's Regional Advertising Markets



Oregon's Image vs. the Competition — Affordable



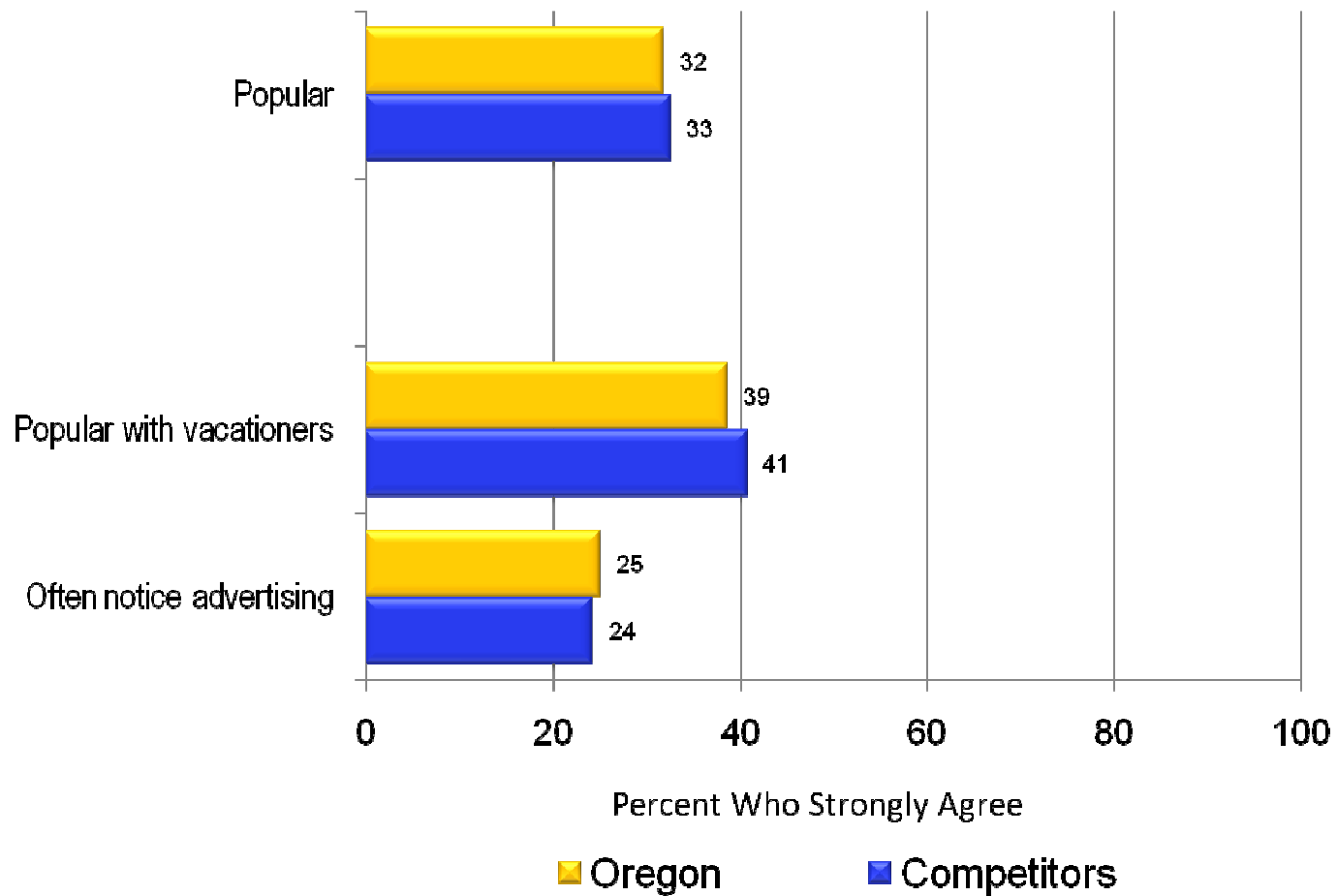
Base: Residents of Oregon's Regional Advertising Markets



Oregon's Image vs. The Competition — Popular



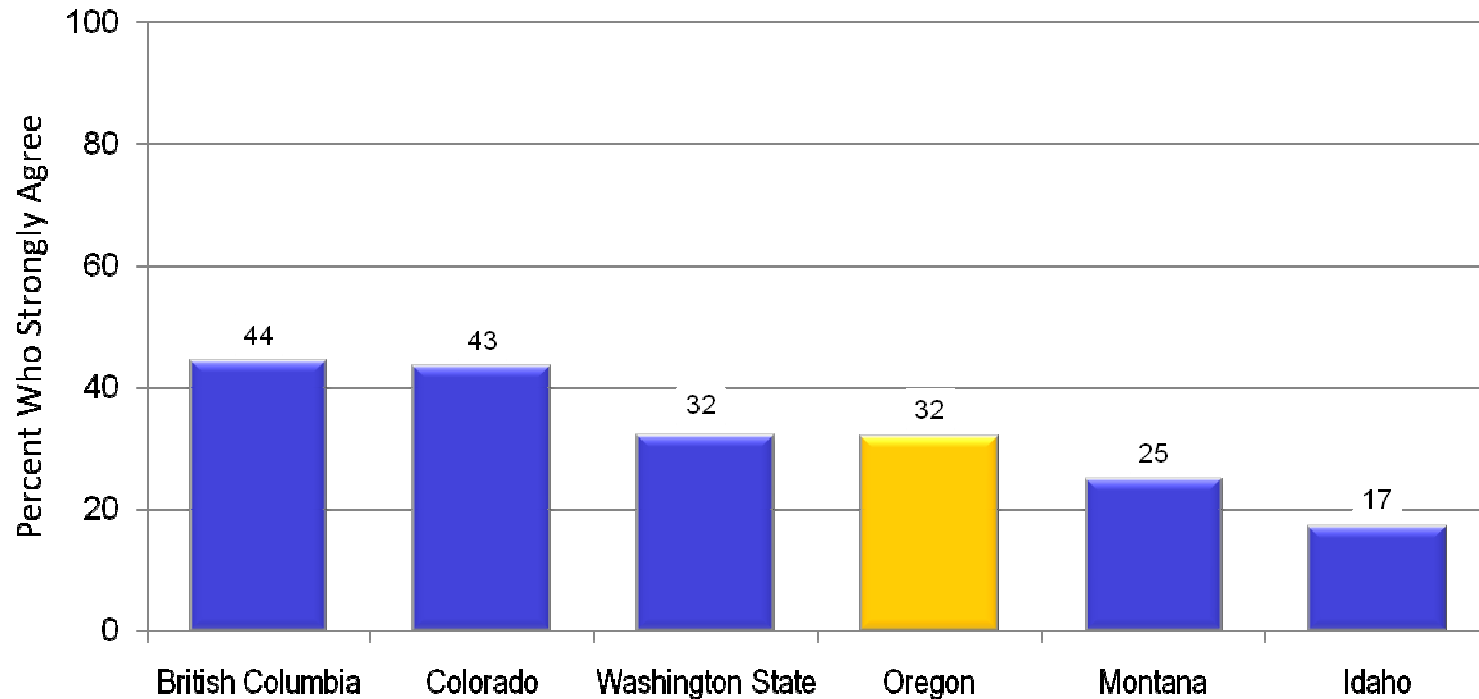
Base: Residents of Oregon's Regional Advertising Markets



Oregon's Image vs. the Competition — Popular



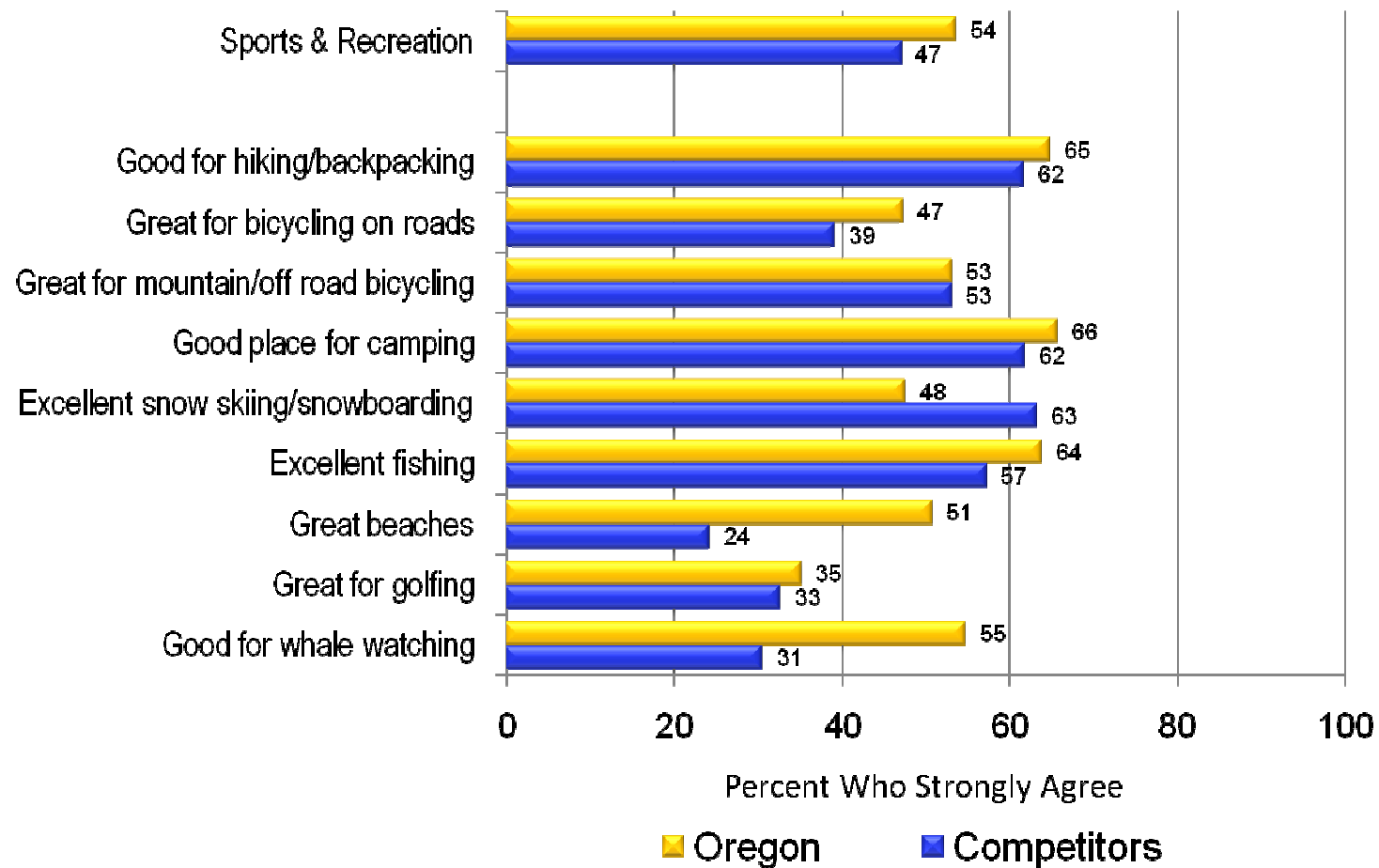
Base: Residents of Oregon's Regional Advertising Markets



Oregon's Image vs. The Competition — Sports & Recreation



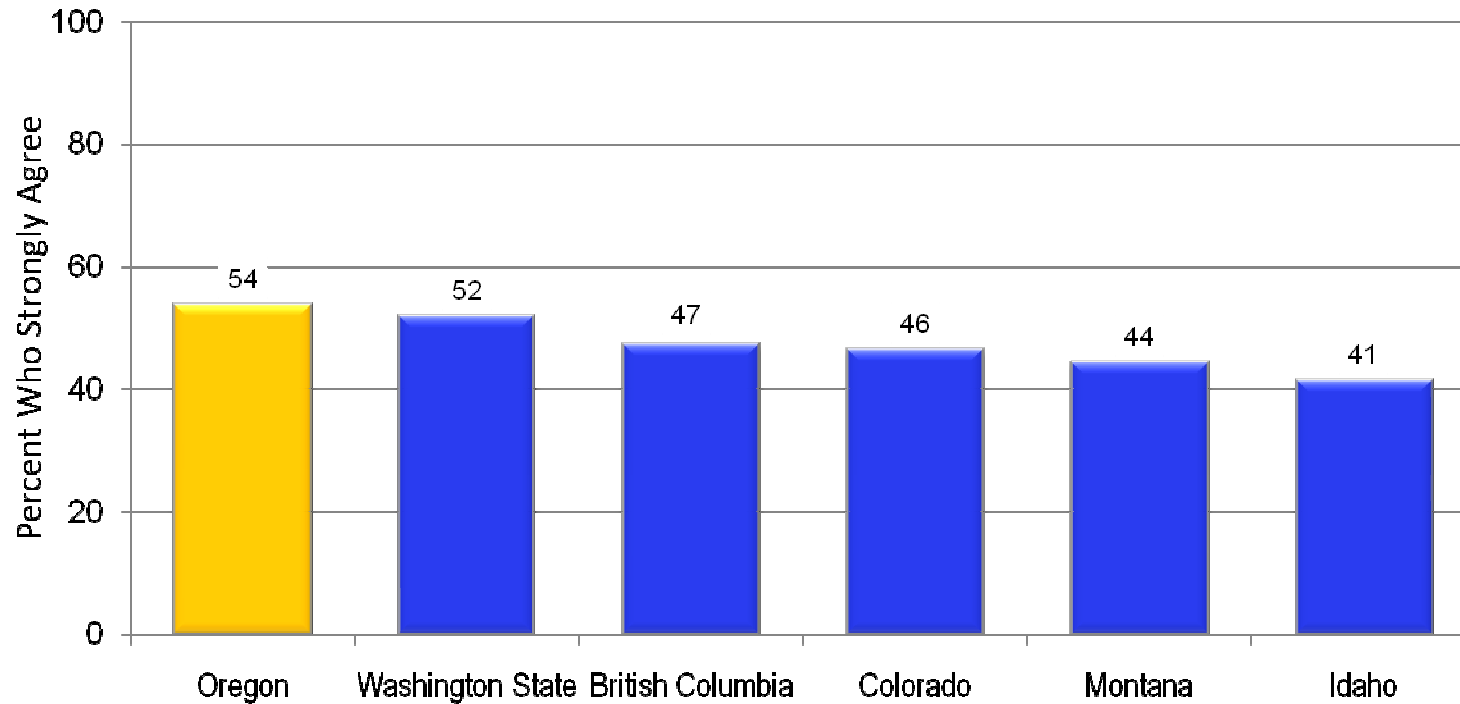
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Oregon's Image vs. the Competition — Sports & Recreation



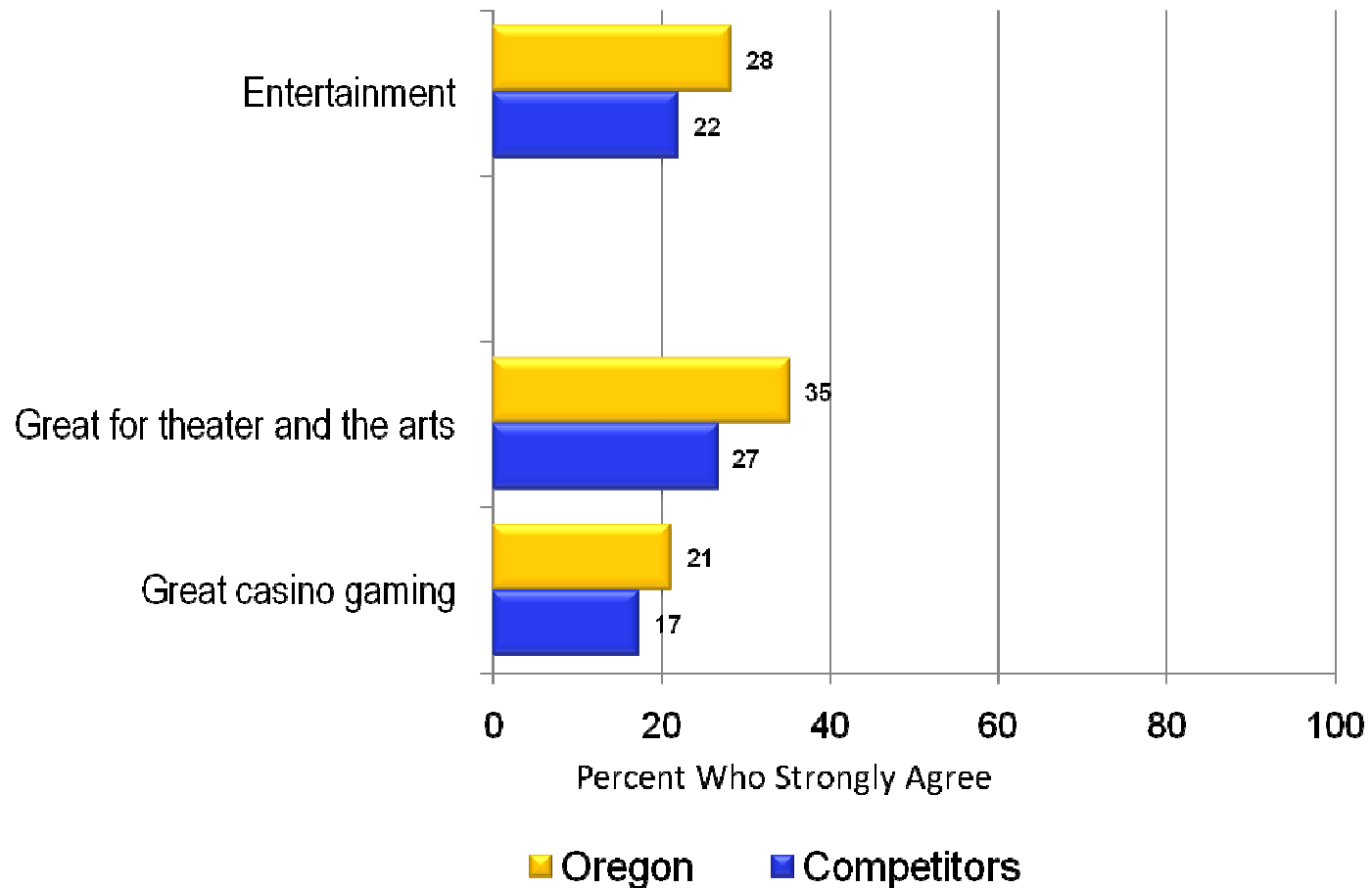
Base: Residents of Oregon's Regional Advertising Markets



Oregon's Image vs. The Competition — Entertainment



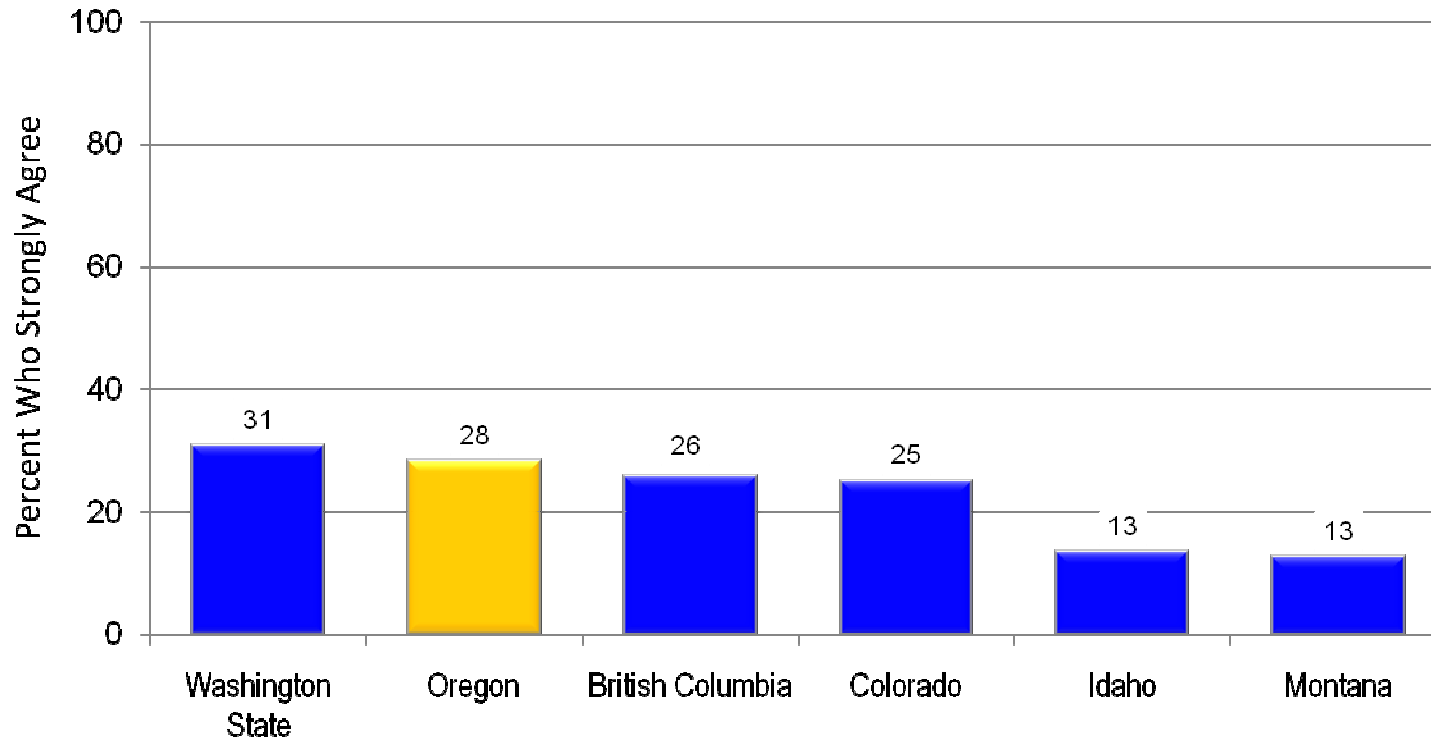
Base: Residents of Oregon's Regional Advertising Markets



Oregon's Image vs. the Competition — Entertainment



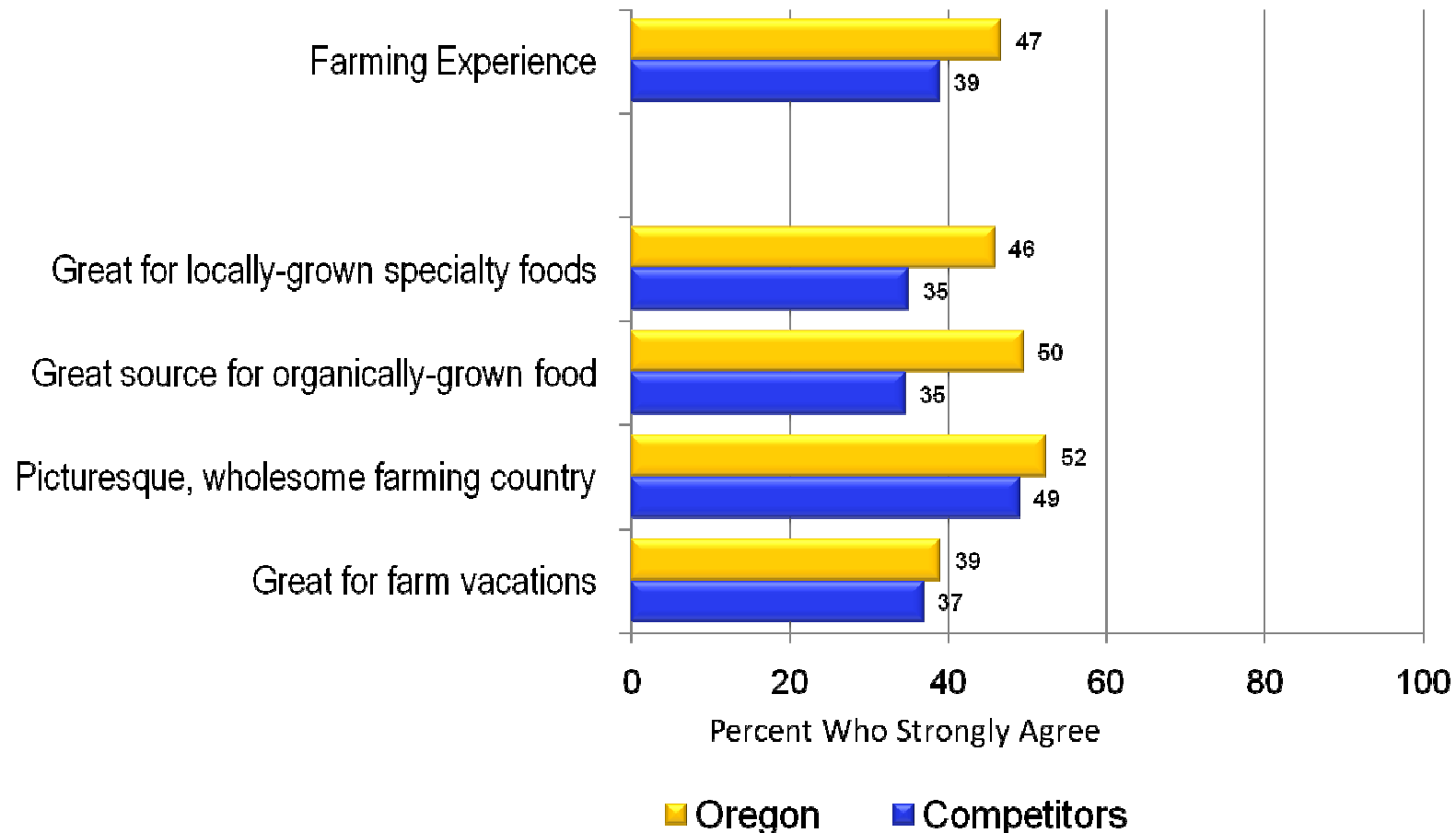
Base: Residents of Oregon's Regional Advertising Markets



Oregon's Image vs. The Competition — Farming Experience



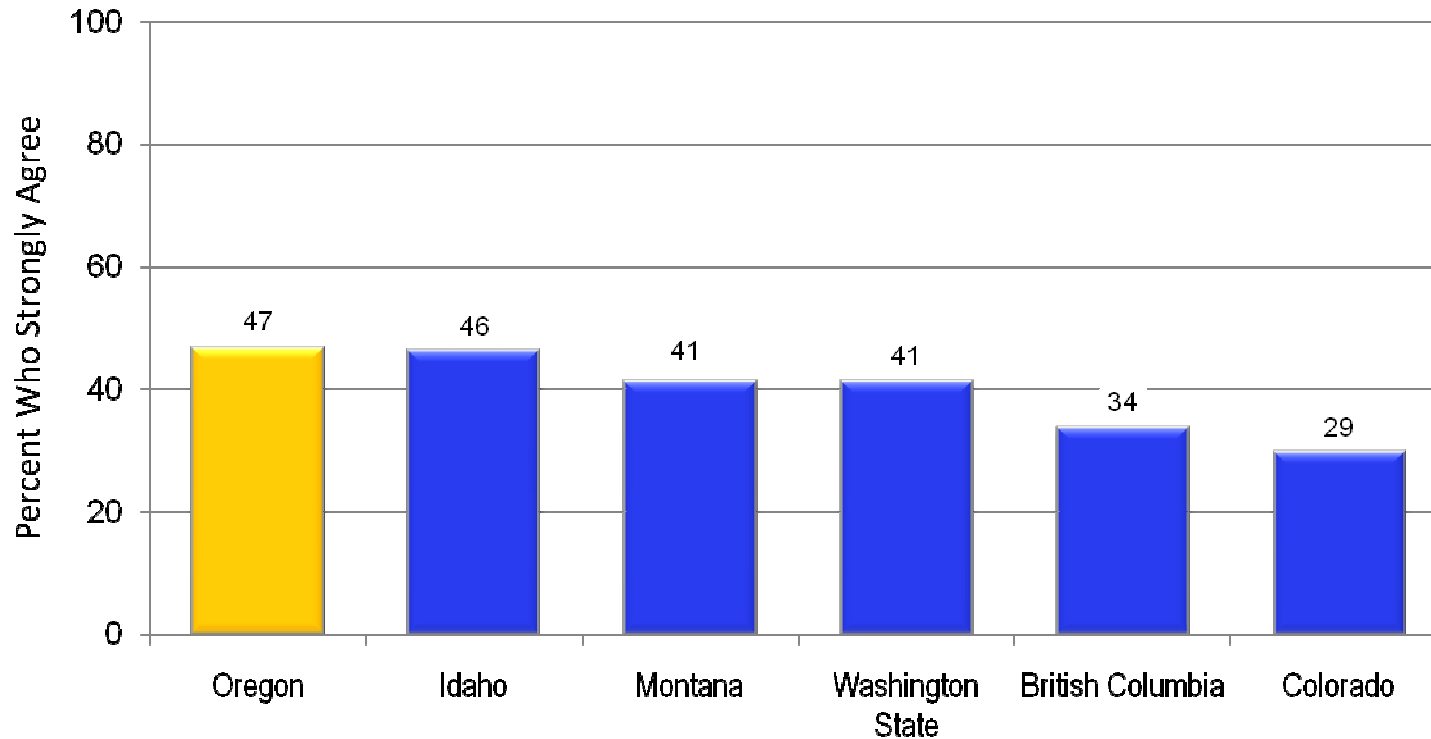
Base: Residents of Oregon's Regional Advertising Markets



Oregon's Image vs. the Competition — Farming Experience



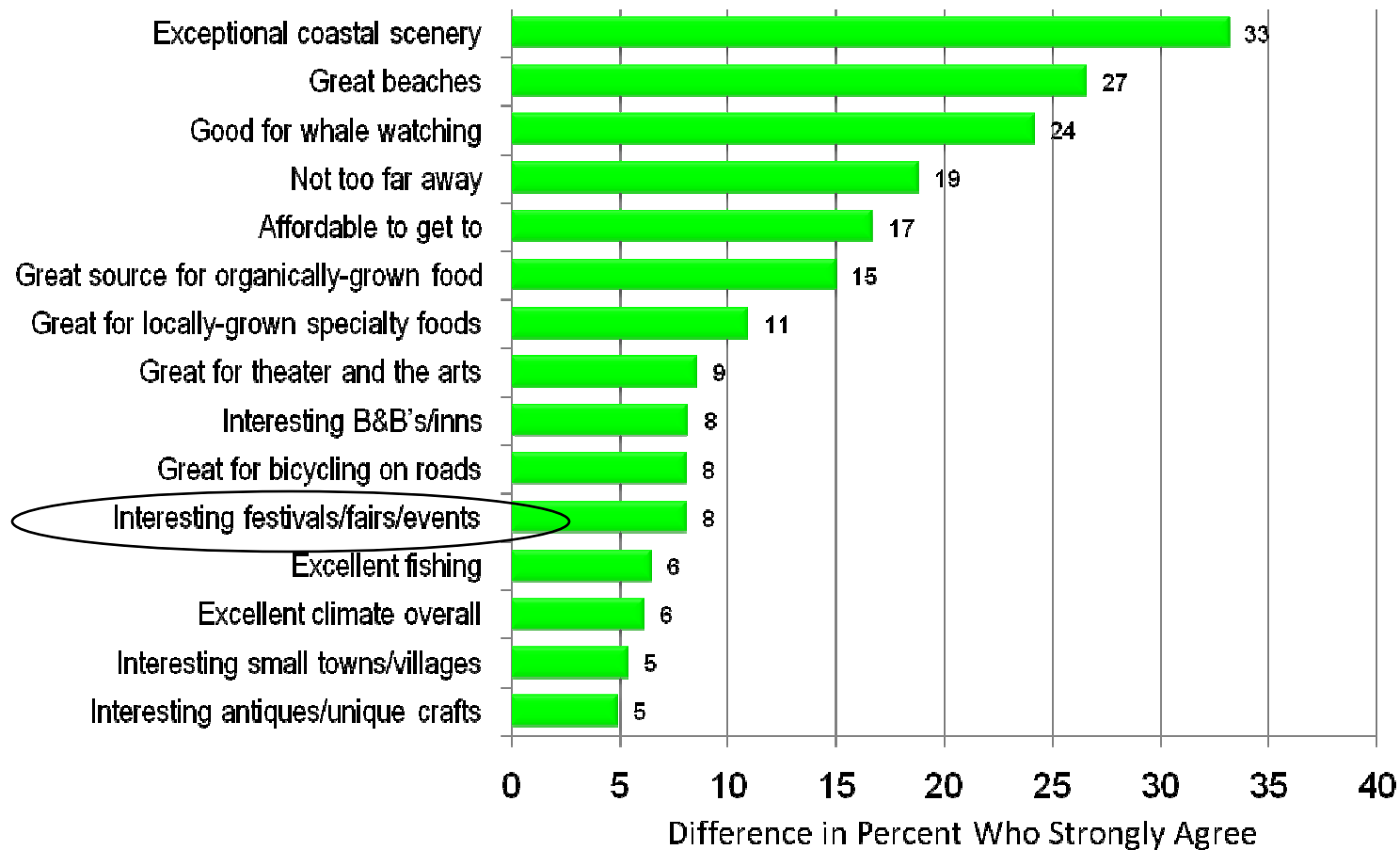
Base: Residents of Oregon's Regional Advertising Markets



Oregon's Image Strengths vs. the Competition



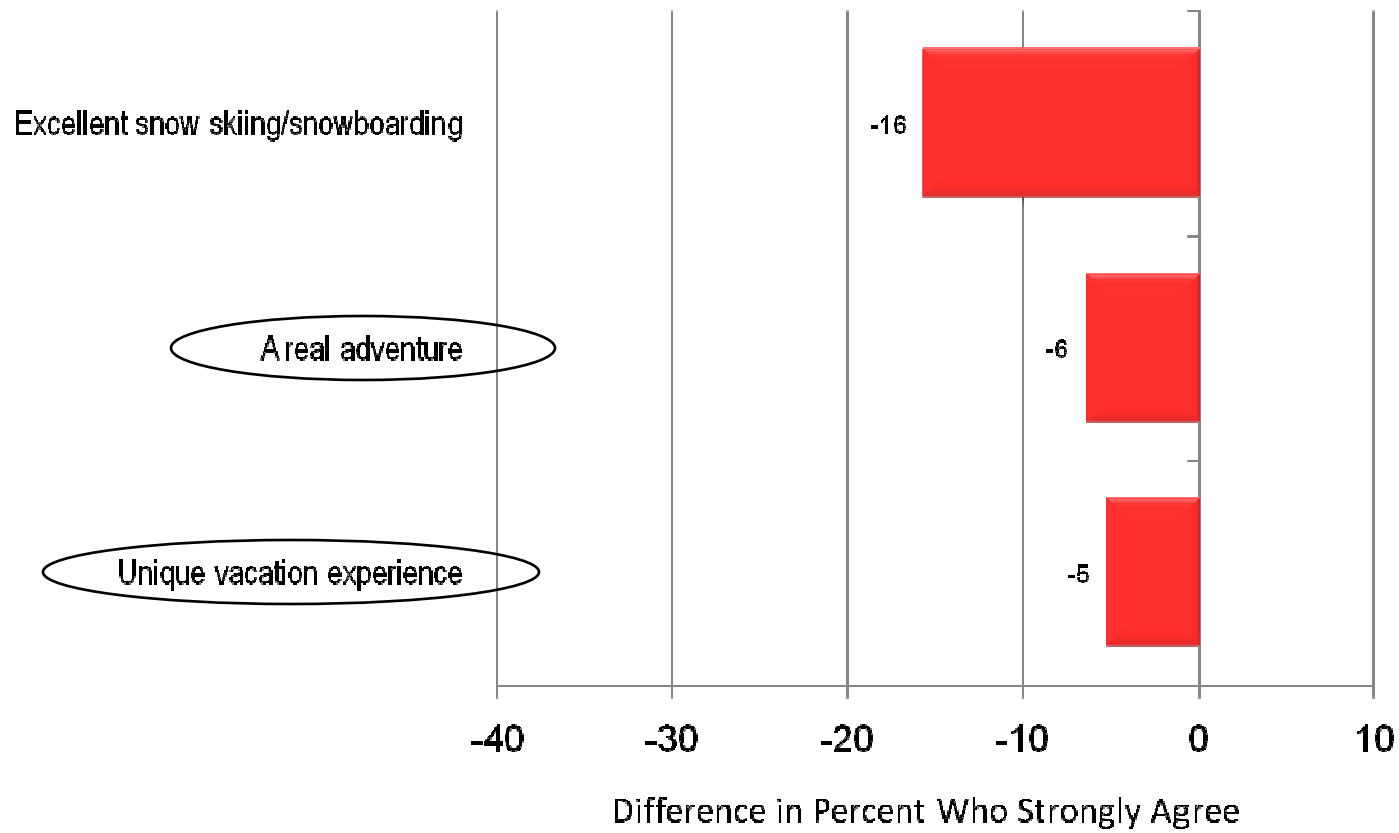
Base: Residents of Oregon's Regional Advertising Markets



Oregon's Image Weaknesses vs. the Competition



Base: Residents of Oregon's Regional Advertising Markets

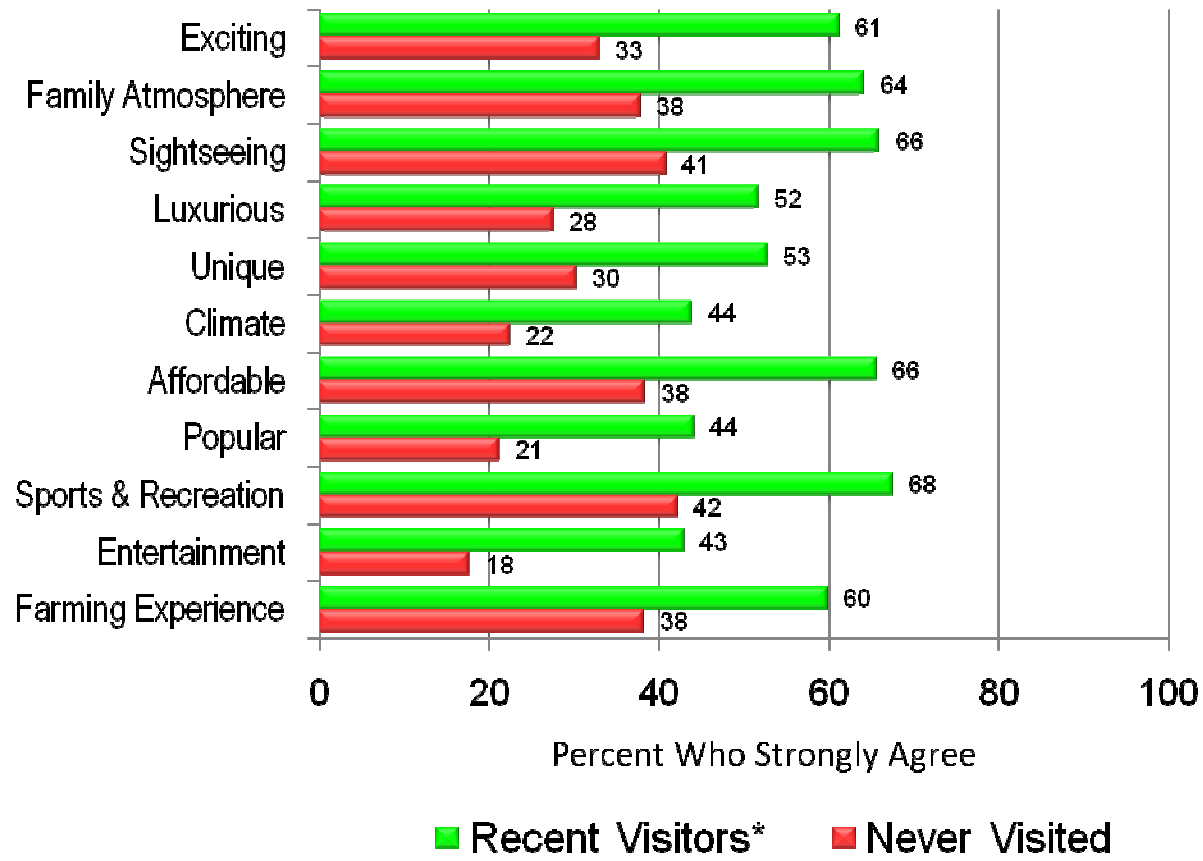


Oregon's Tourism Product

Oregon's Product vs. Image



Base: Residents of Oregon's Regional Advertising Markets

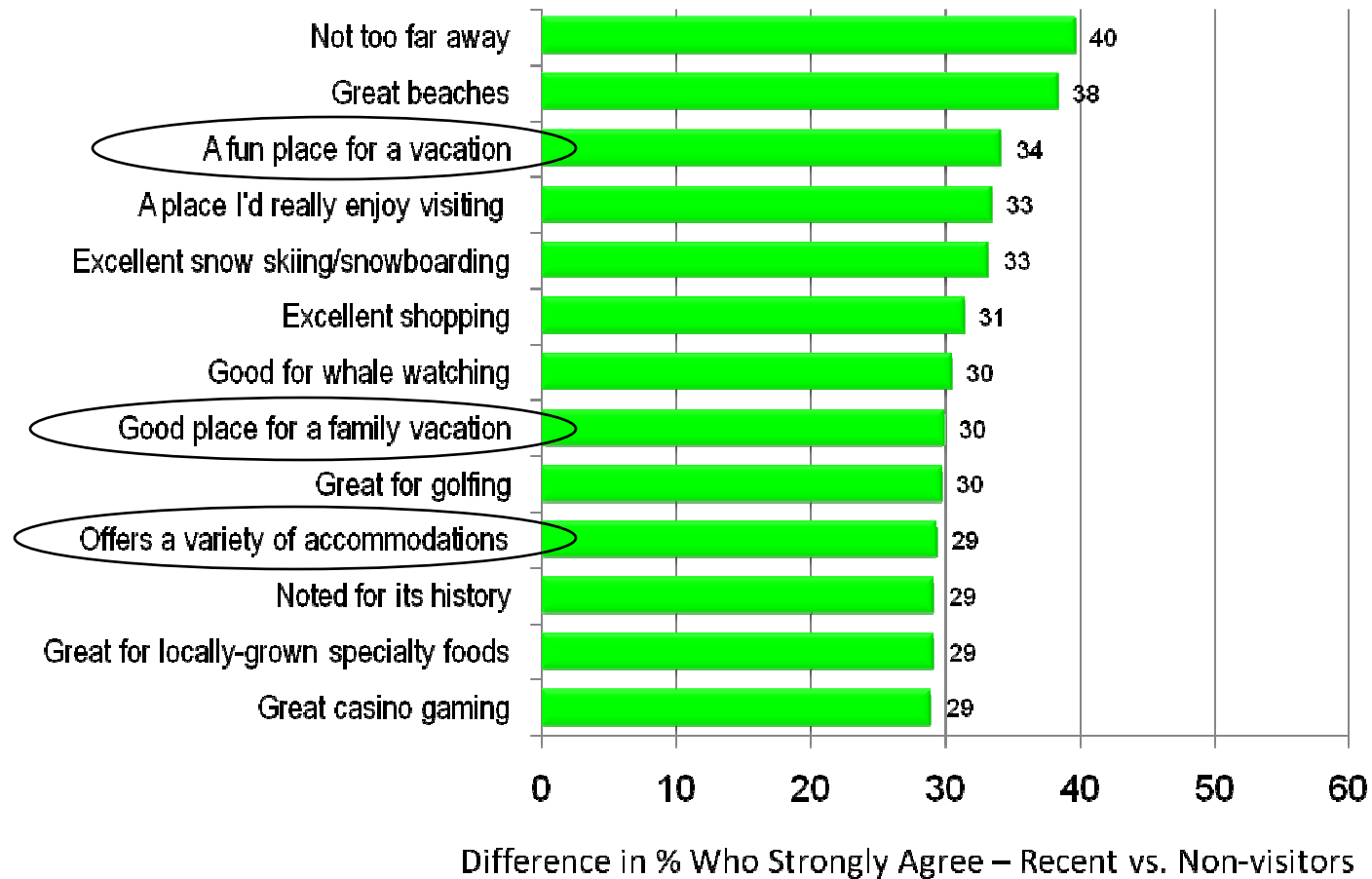


* Visited in past two years

Oregon's Main Product Strengths vs. Image



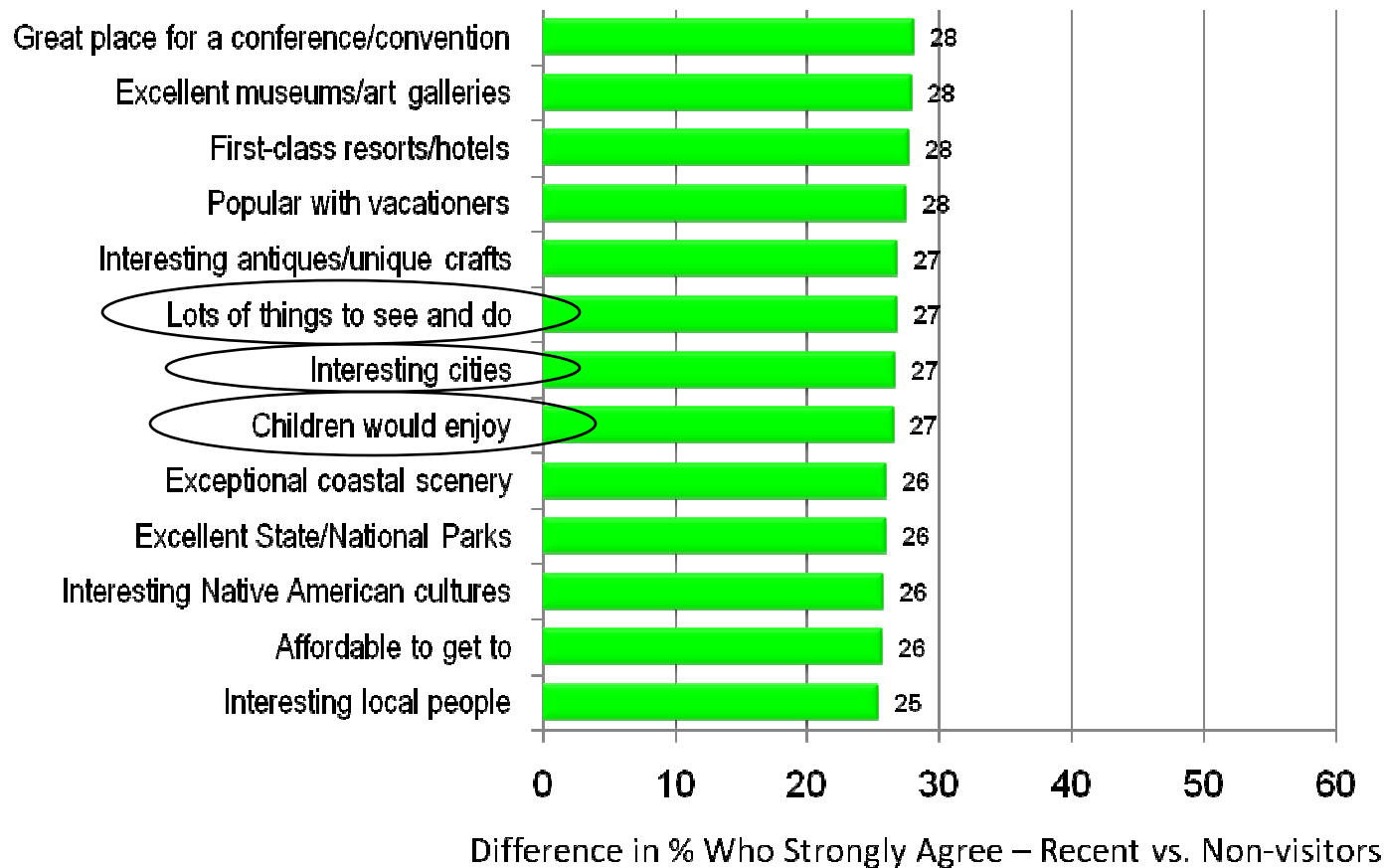
Base: Residents of Oregon's Regional Advertising Markets



Oregon's Main Product Strengths vs. Image (Cont'd)



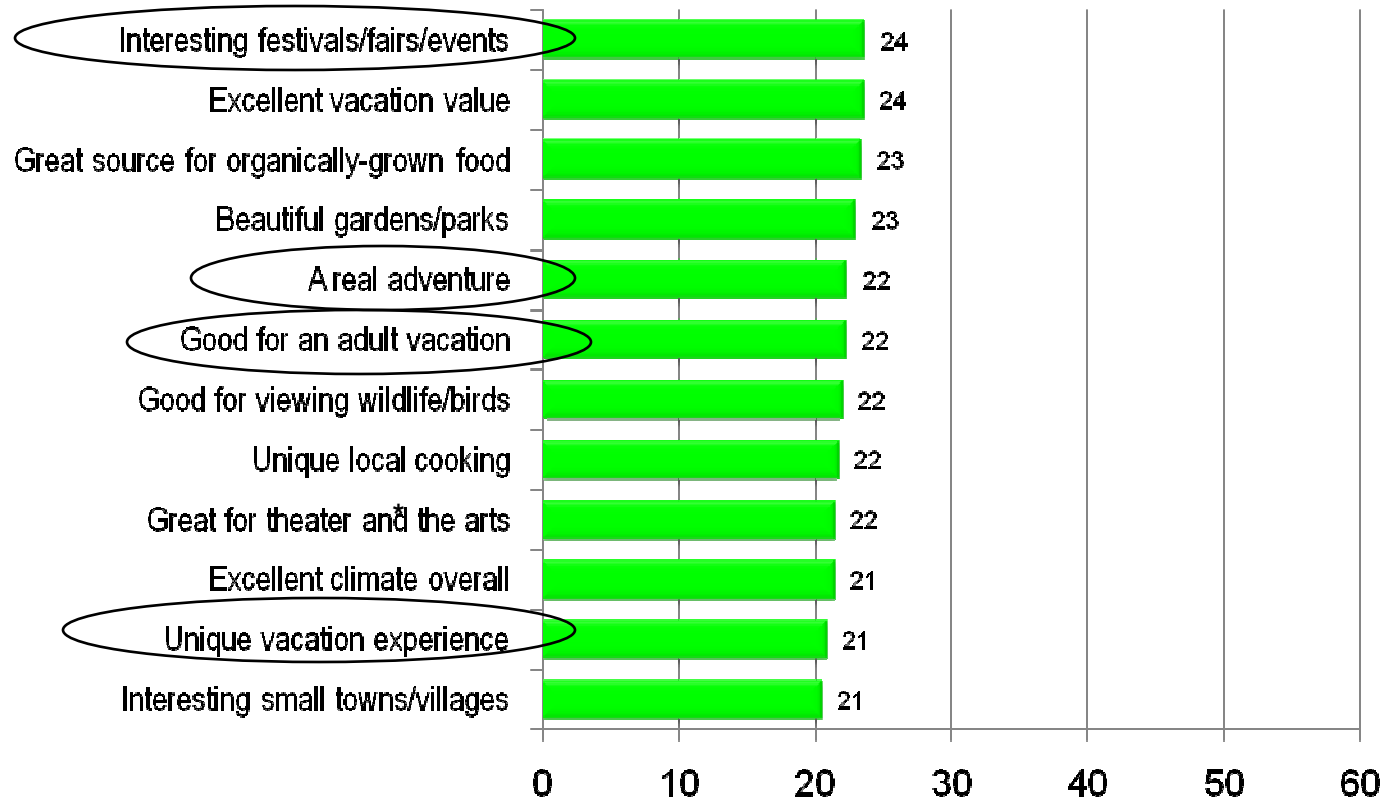
Base: Residents of Oregon's Regional Advertising Markets



Oregon's Main Product Strengths vs. Image (Cont'd)



Base: Residents of Oregon's Regional Advertising Markets

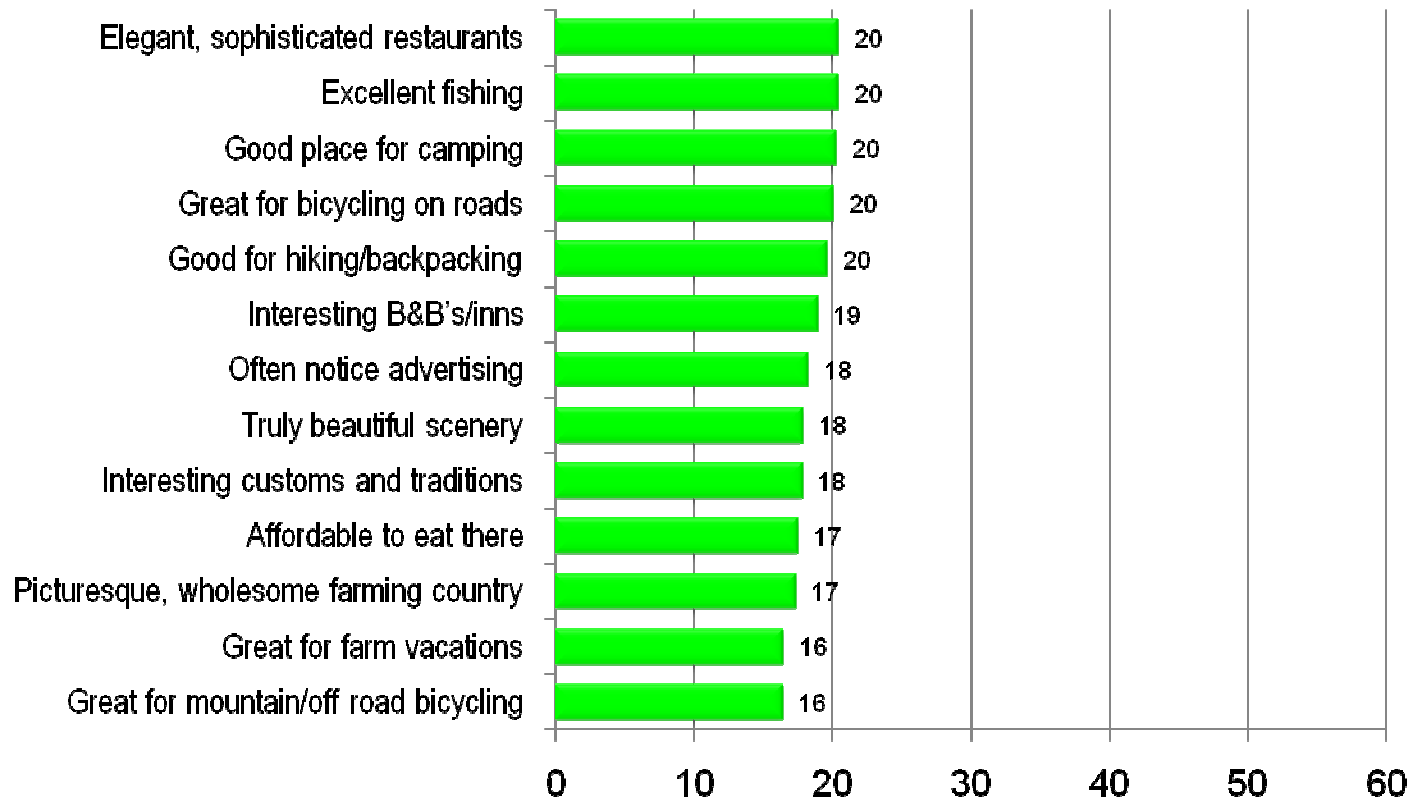


Difference in % Who Strongly Agree – Recent vs. Non-visitors

Oregon's Main Product Strengths vs. Image (Cont'd)



Base: Residents of Oregon's Regional Advertising Markets



Difference in % Who Strongly Agree – Recent vs. Non-visitors

Oregon's Product Weaknesses vs. Image



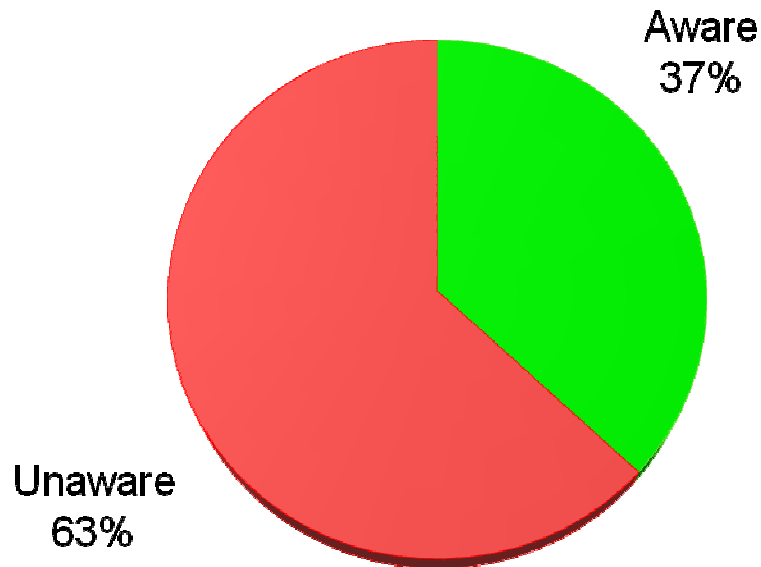
**No Product Weaknesses
vs. Image**

Short-of Sales Impacts

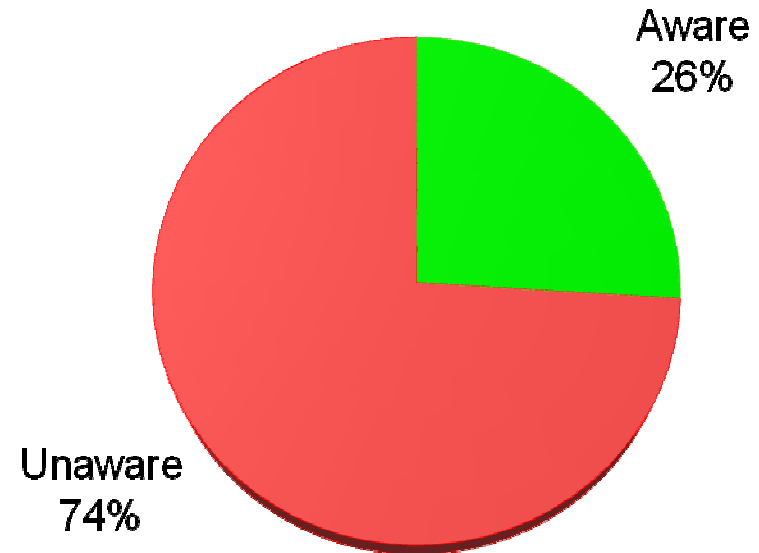
Awareness* of the 2008 Oregon Advertising Campaign



Primary Market



Secondary Market

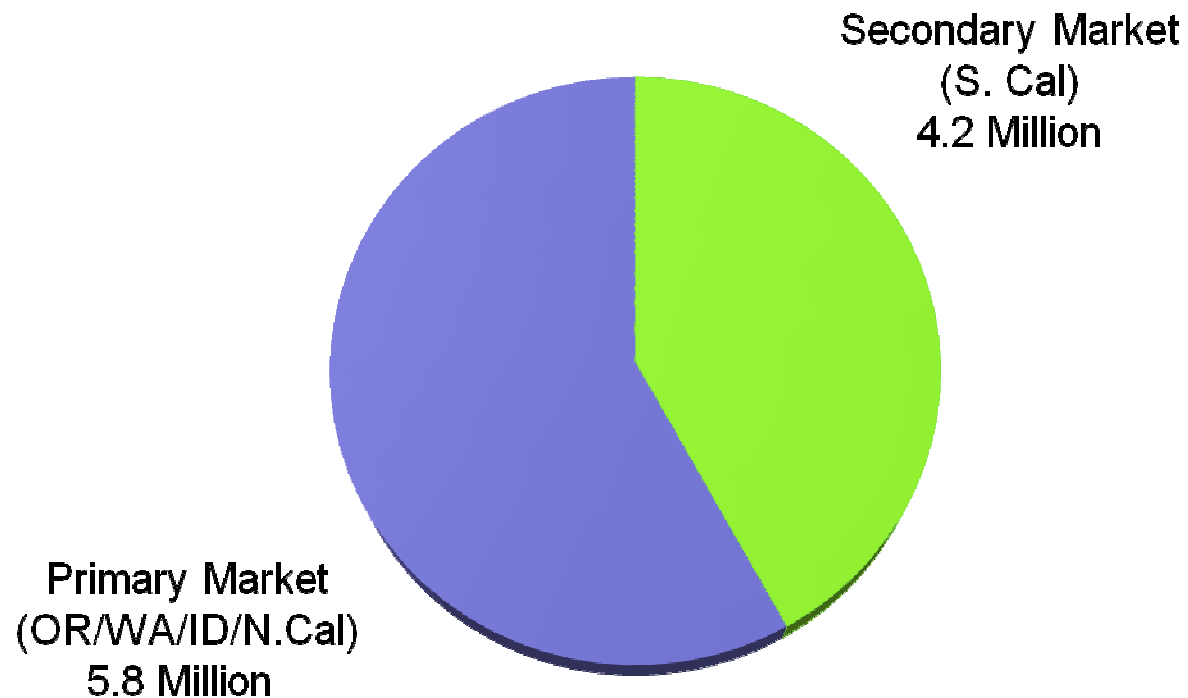


*Saw at least one ad

Awareness* of the 2008 Oregon Advertising Campaign



Total Travelers Aware of Advertising* = 10 Million

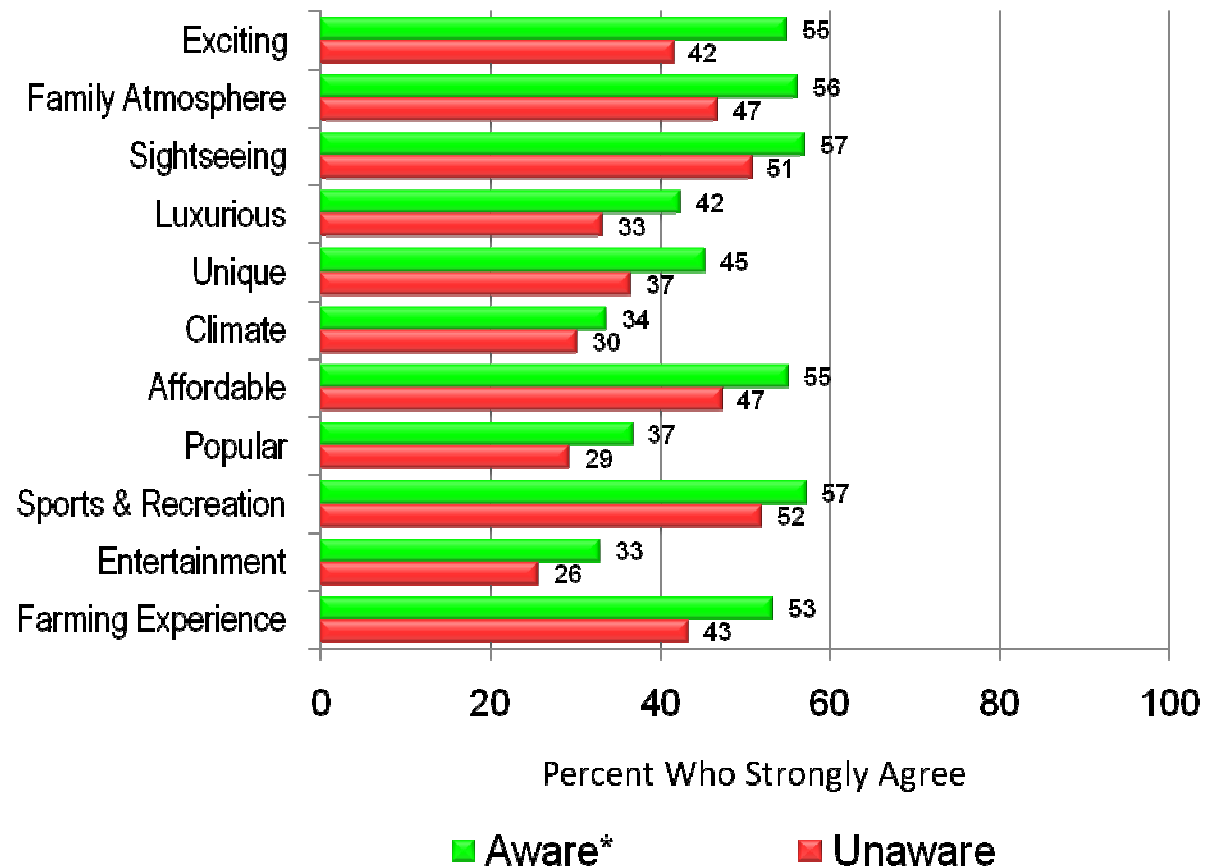


*Saw at least one ad

Impact of Advertising on Oregon's Image as a Travel Destination



Base: Residents of Oregon's Regional Advertising Markets



*Saw at least one ad

Short Term Bottom Line Impacts During 2008

Trips To Oregon in 2008 Due to Advertising



	Primary Market	Secondary Market	Total	2004
Day	384,300	N/A	384,300	114,700
Overnight	436,100	221,100	657,200	228,500
Total	820,400	221,100	1,041,500	343,200

Short-Term Campaign Impacts



Regional Travel Market: Oregon, Idaho, Washington and California

	Primary Market	Secondary Market	Total 2008	2004
Ad Investment	\$1 M	\$0.7 M	\$1.7 M	\$0.9 M
Incremental Visits	820,400	221,100	1,041,500	343,200
Incremental Spending	\$166M	\$62M	\$228.2M	\$67.4 M
Ad \$'s per Trip	\$1.17	\$3.37	\$1.63	\$2.61
Trips per Ad \$.86	.30	.61	.38
Incremental Taxes	6.6\$	2.5\$	9.1\$	\$2.6 M
Tax ROI*	7:1	3:1	5:1	3:1

* Incremental taxes per ad \$ invested.

NOTE: Incremental spending and taxes are based on Longwoods International and Dean Runyan & Assoc. estimates.

Carry Over Impact

Intended Trips* to Oregon in 2009 Due to 2008 Advertising



	Primary Market	Secondary Market	Total
Day	303,700	N/A	303,700
Overnight	390,700	474,600	865,300
Total	694,400	474,600	1,169,000

NOTE: Excludes those who visited in the prior year.

Longer Term Impacts

Total Visits To Oregon Due To Advertising —2008 vs. 2004



Regional Travel Market: Oregon, Idaho, Washington, and California

	2008	2004
Short-term:		
Day	384,400	114,700
Overnight	657,200	228,500
Total	1,041,600	343,200
Longer-term:		
Day	164,300	73,300
Overnight	291,000	266,400
Total	455,300	339,700
Combined:		
Day	548,700	188,000
Overnight	948,200	494,900
Total	1,496,900	682,900

Incremental Visitor Spending and Taxes —2008 vs. 2004



Regional Travel Market: Oregon, Idaho, Washington, and California

	2008	2004
Short-term:		
Incremental Spending	\$228.2 M	\$70.9 M
Taxes Generated	\$9.1 M	\$2.7 M
Longer-term:		
Incremental Spending	\$100.4 M	\$75.9 M
Taxes Generated	\$4.0 M	\$2.9 M
Combined:		
Incremental Spending	\$328.6 M	\$146.8 M
Taxes Generated	\$13.1 M	\$5.6 M

Bottom-Line Impacts —2008 vs. 2004



Regional Travel Market: Oregon, Idaho, Washington, and California

	2008	2004
Short-term:		
ROI	5:1	3:1
Ad \$'s Per Visit	\$1.63	\$2.61
Visits Per Ad \$	0.61	0.38
Longer-term:		
ROI	3:1	3:1
Ad \$'s Per Visit	\$3.74	\$2.63
Visits Per Ad \$	0.27	0.38
Combined:		
ROI	8:1	6:1
Ad \$'s Per Visit	\$1.14	\$1.31
Visits Per Ad \$	0.88	0.76

Reasons for Not Visiting Oregon

Reasons for not Visiting



- Among those respondents who had indicated intent to visit Oregon in 2009 but did not convert, the reasons for not visiting included:
 - *Just over a third either lost interest, decided not to travel at all or went elsewhere*
 - *Approximately 34% cited lack of time and/or money*
 - *The remainder indicated reasons ranging from health issues to prior experience in Oregon.*

Reasons for Not Visiting Oregon



Base: Intenders who did not visit Oregon

