



2016 Brand Health Trending & Overnight Visitor Study

NOVEMBER 2016

Background & objectives

- Oregon's Mt. Hood Territory (OMHT) is a unique destination near Portland offering access to Mt. Hood and a variety of activities and experiences. Clackamas County Tourism & Cultural Affairs (CCTCA) is charged with developing and administering a comprehensive destination marketing plan for OMHT.
- The organization is committed to staying ahead of the curve and defining strategies as unique as the destination itself to identify travelers who would visit OMHT – travelers potentially in more distant markets. In particular, there is interest in divining ways to drive overnight visitation where visitors use paid accommodations in OMHT.
- CCTCA partnered with Strategic Marketing & Research Insights (SMARInsights) to conduct research to:
 - Analyze and trend brand health measures to gauge movement of OMHT ad awareness, familiarity, destination rating and image perceptions compared to 2013 research;
 - Compare/contrast impact of the 2016 advertising to that of the 2013 effort;
 - Explore differences between overnight and day visitors and identify opportunities to increase overnight visitation; and
 - Propose insights to expand and improve upon existing programs and communications, as well as to inform future marketing.

Methodology

- Data were collected via an online survey in October 2016.
- An email with a link to the survey was sent to targeted geographies using national research panels to ensure a demographically balanced sample.
- An online survey allows respondents to view the creative executions and provide evaluations to permit measurement of their attitudes, familiarity and behavior regarding OMHT travel.
- Respondents were screened to ensure that they are leisure travelers and travel decision makers for their household.
- Data were weighted to be representative of the Designated Marketing Areas (DMAs) within which surveys were conducted. The following is a review of the research results.

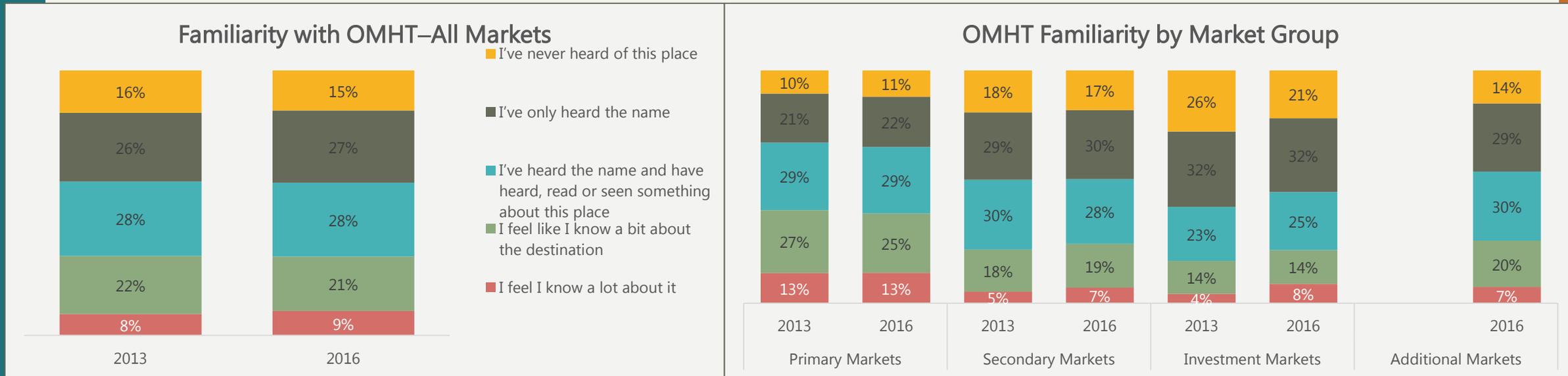
Market Group		Surveys
Primary	Eugene/Portland/Salem	236
	Other Oregon	30
	Washington state	270
	Northern California	569
	Total	1,105
Secondary (Vancouver and Southern California)		726
Investment (Washington, DC; Austin, Minneapolis)		419
Additional Ad (Arizona, Idaho, Nevada, Utah)		404
Total		2,654



CURRENT SITUATION

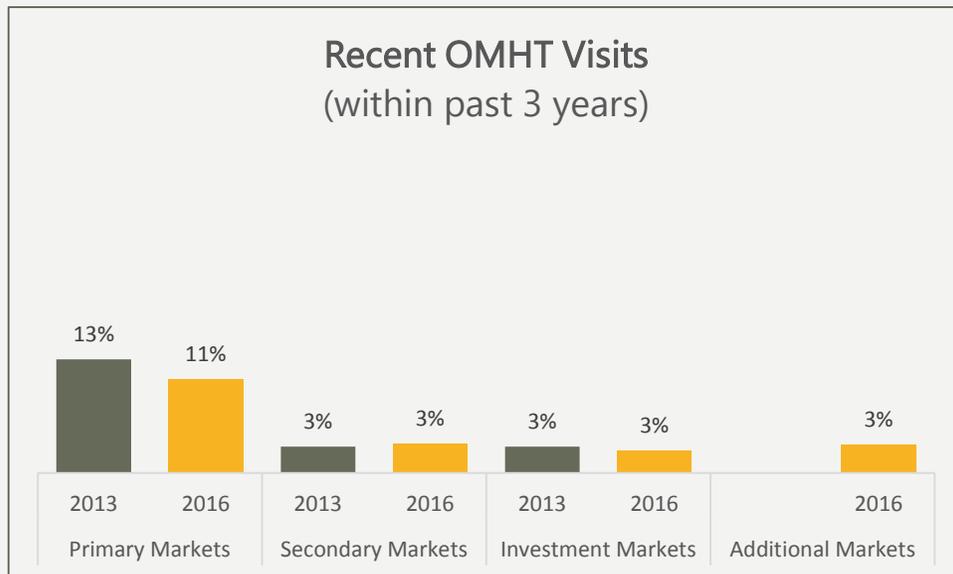
Familiarity consistent with 2013

- OMHT partnered with SMARInsights in 2013 to conduct similar image and brand health research. Much of the survey instrument was retained in the current measure so results could be compared to the earlier research.
- Familiarity with OMHT is similar to 2013. This should be expected, as it is difficult to move levels of familiarity without significant levels of advertising and marketing. The biggest increase in familiarity was among the Investment markets, where resources have been invested and where familiarity was low in 2013.



Increase in intent to visit

- The data show that, compared to 2013, recent visitation is consistent overall and within the market groups that were measured in both waves of research. However, likelihood to visit in the near future has grown in all geographies.
- This bodes well for OMHT, as interest and intent precede actual visitation.
- Intent has grown across all market groups

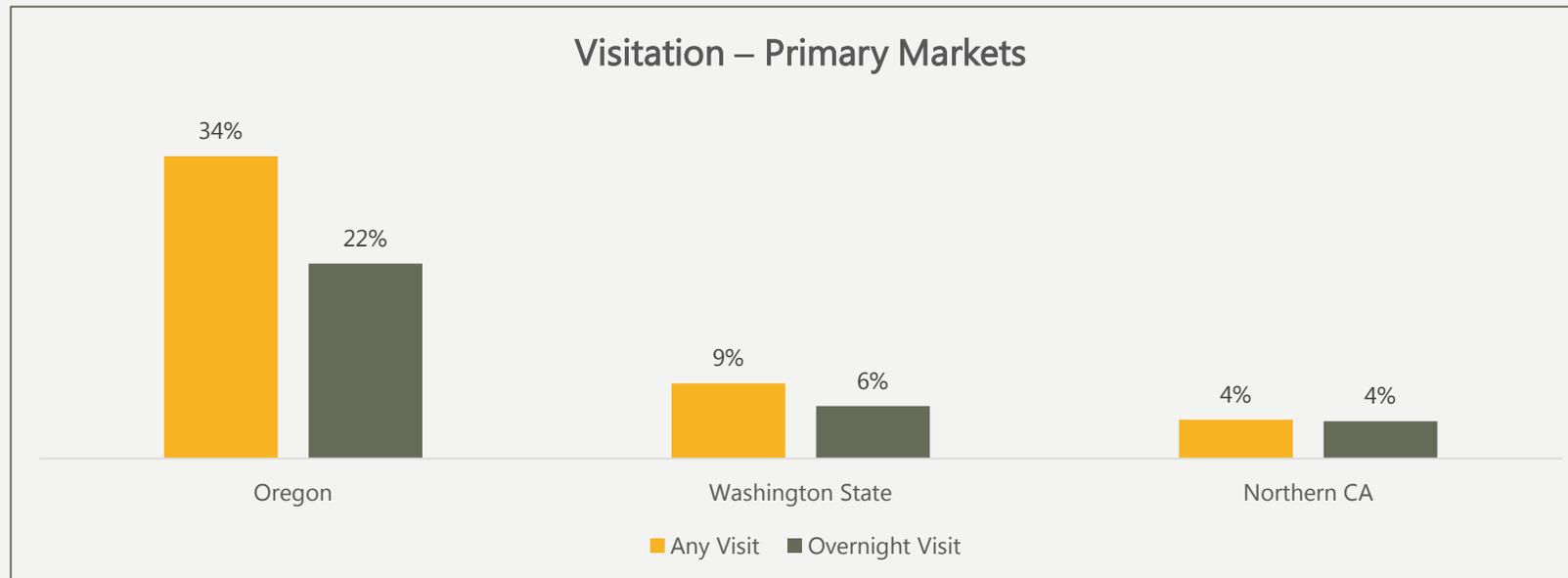


Recent visits: Please click on the map to show which region(s) in Oregon you have visited in the past 2 years. [If Mt. Hood/The Gorge selected] Within the Mt. Hood/The Gorge region, please click on the areas you have visited in the past 2 years.

Likelihood to visit: How likely are you to take a leisure trip to [Oregon's Mt. Hood Territory] in the next year? *Shown is 100% of those "already planning a trip," 80% of those "very likely" and 20% of those "somewhat likely" to visit.*

Oregon drives primary market visitation

- OMHT's visitation is largely from nearby Oregon cities or elsewhere in the state. But a significant portion of the in-state travel is day trips.
- Both the state of Washington and Northern California generate significantly less travel, and it is noteworthy that a significant amount of the visitation from Washington involves day trips.

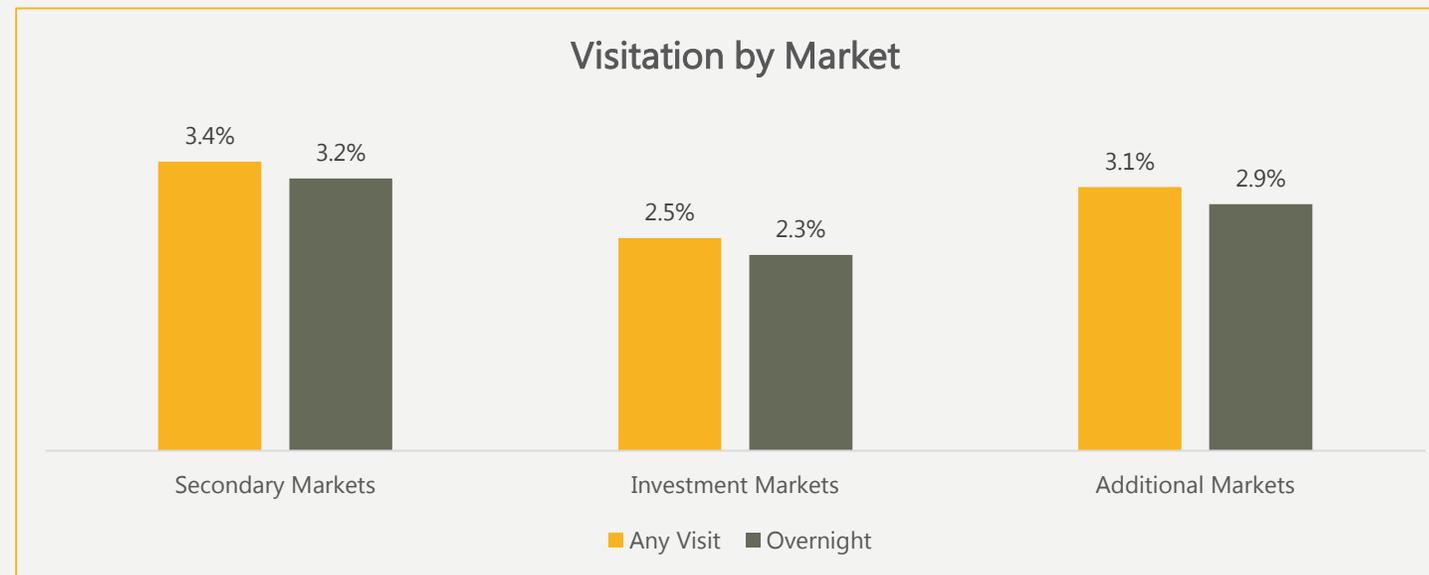


Recent visits: Please click on the map to show which region(s) in Oregon you have visited in the past 2 years. [If Mt. Hood/The Gorge selected] Within the Mt. Hood/The Gorge region, please click on the areas you have visited in the past 2 years.

Overnight visits: How many nights did you spend in Oregon's Mt. Hood Territory? *Shown are trips over 0 nights.*

In non-primary markets, most visitation includes overnight stays

- OMHT's visitation doesn't vary much between the secondary, investment and other markets measured.
- Generally, from these markets when people visit the area, they are staying overnight. So targeting these more distant markets is a good strategy for generating overnight visitation.



Recent visits: Please click on the map to show which region(s) in Oregon you have visited in the past 2 years. [If Mt. Hood/The Gorge selected] Within the Mt. Hood/The Gorge region, please click on the areas you have visited in the past 2 years.

Overnight visits: How many nights did you spend in Oregon's Mt. Hood Territory? *Shown are trips over 0 nights.*

In primary markets, many have strong intent to visit the area

- It is also helpful to consider future intentions – both the percentage of people already planning a trip to the area, as well as those who indicate they are very likely to visit. Again, intent is much stronger among Oregon residents compared to other primary markets.
- Since these groups of markets differ in size, the number of households represented by those “already planning and very likely” is included. While these are not meant to represent actual potential visitation, they do provide a comparative measure of the potential for each group of markets.



Likelihood to visit: How likely are you to take a leisure trip to [Oregon's Mt. Hood Territory] in the next year? Already planning a trip, Very likely, Somewhat likely, Not very likely, Not at all likely

Intent to visit is strong in non-primary markets

- Among the other markets, there is interest, although few trips already planned. It is noteworthy that the group of markets with the most trips that are “already planned” is the investment markets, highlighting the potential of this group of markets.
- Again, the number of households is included to provide a comparative context.

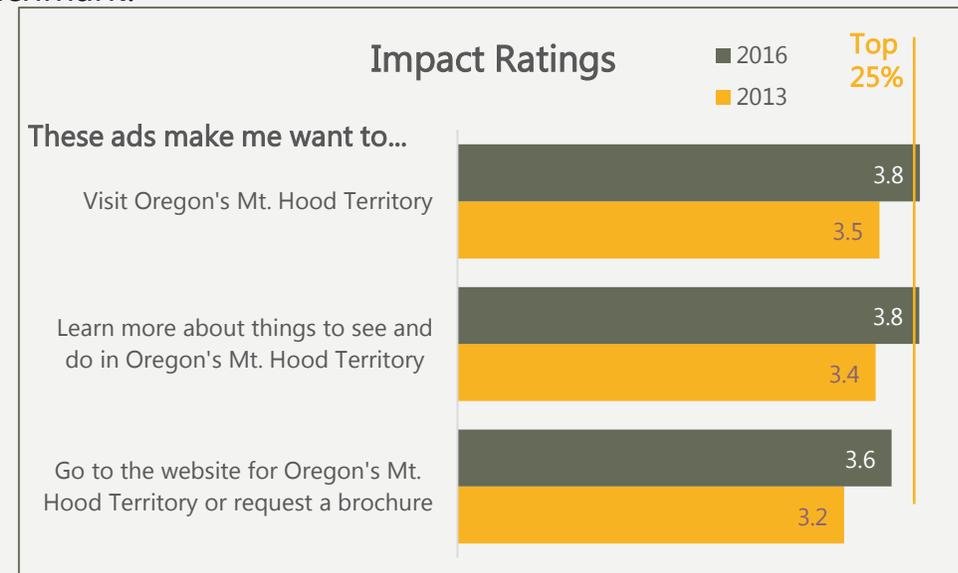
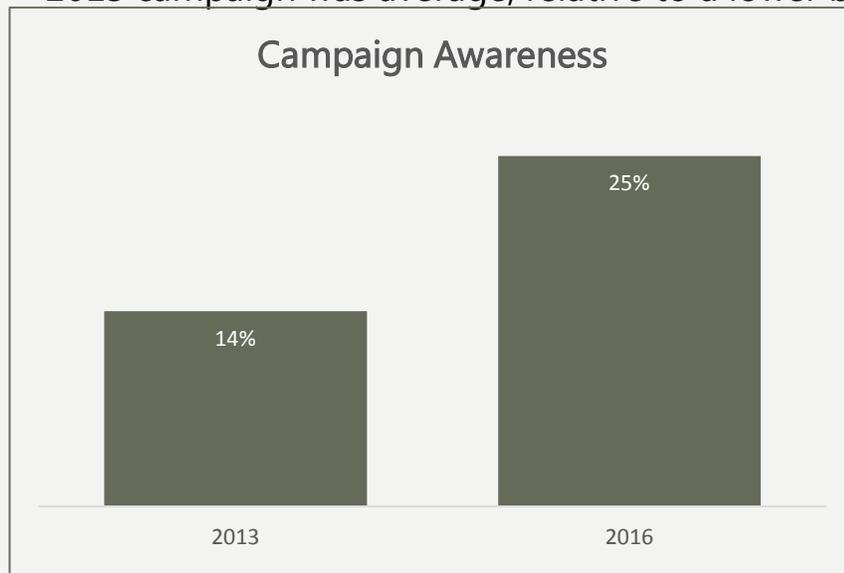




ADVERTISING AWARENESS

Campaign awareness up; ads deliver strong impact

- A key reason for the increase in overall visit interest could be OMHT's continued advertising and the strength of its campaign. This round of research, 25% of respondents are aware of OMHT advertising, up from 14% in 2013.
- On all impact ratings, the current campaign rates higher than the prior campaign.
- SMARInsights' domestic ad campaign benchmarks have increased since 2013 as ad campaigns (digital campaigns in particular) are becoming more savvy at appealing to target audiences. OMHT's improved influence on visit interest put the campaign in the top 25% of campaigns SMARInsights has tested. The 2013 campaign was average, relative to a lower benchmark.

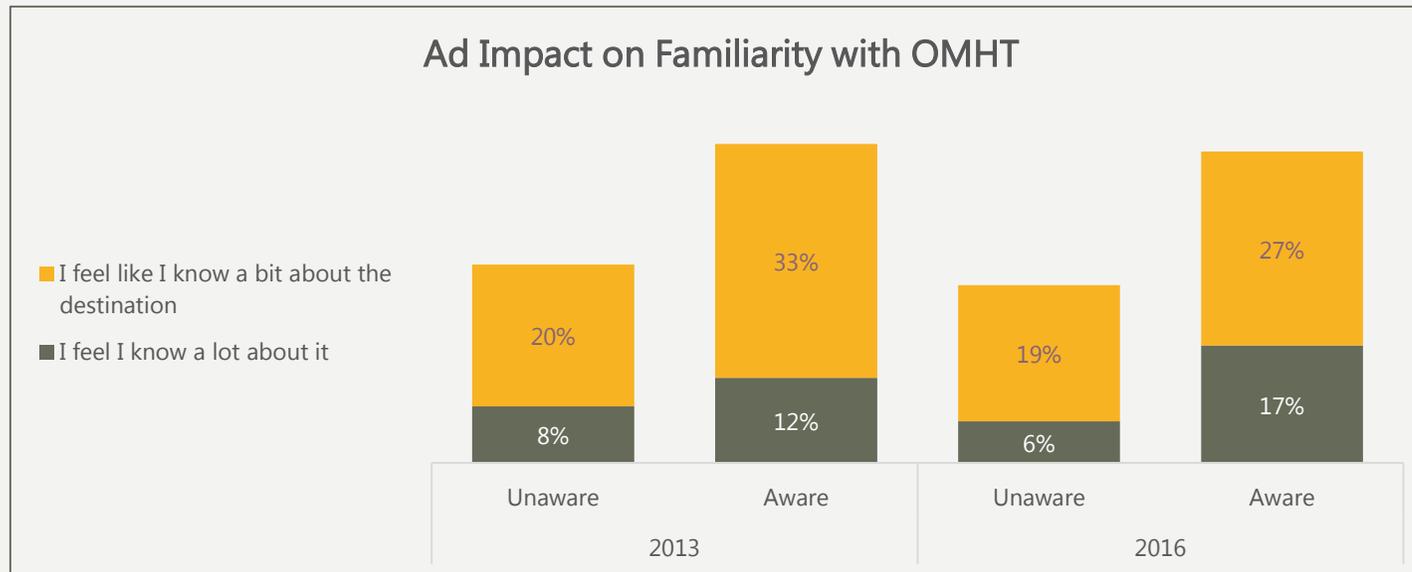


Have you seen this ad or one like it before?

Now, considering all the ads you've just seen, please indicate how much you agree that these ads make you want to... 5=strongly agree, 1=strongly disagree; mean ratings shown

Current ads boost familiarity

- OMHT’s marketing efforts are having a positive impact in a number of ways.
- While the 2013 campaign positively impacted familiarity – boosting by 4 points the share of travelers who knew “a lot” about the destination – the current campaign is associated with a more than 10-point boost in this level of familiarity.



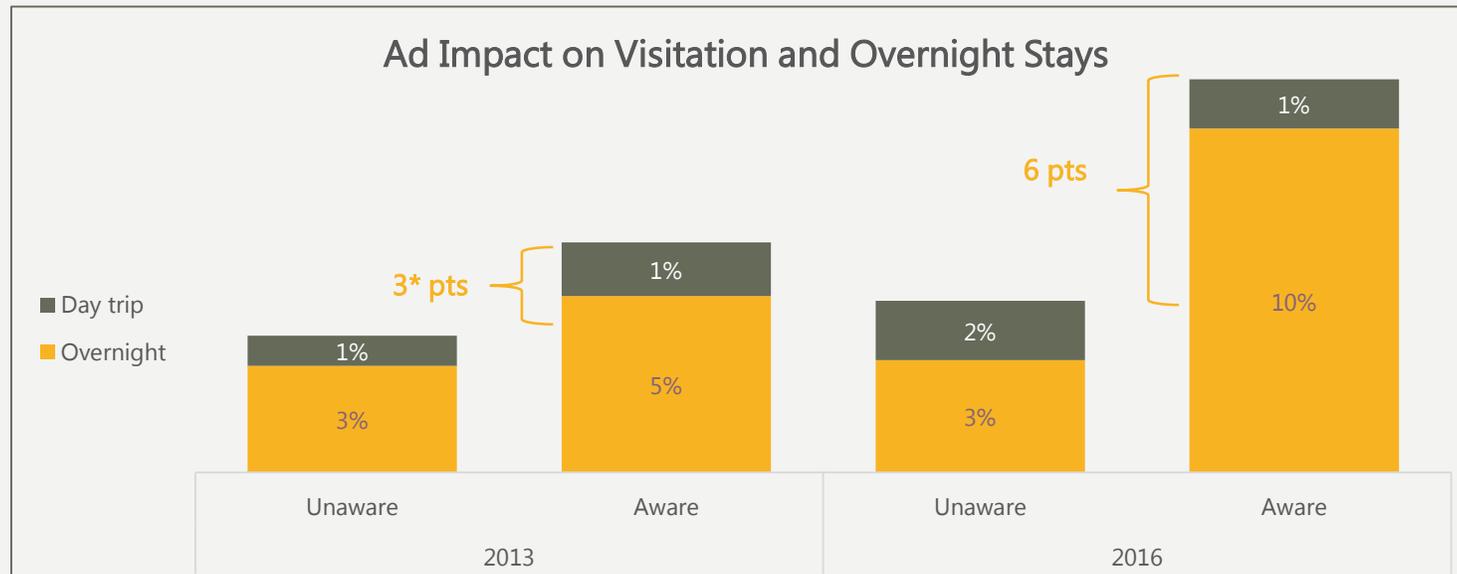
Ads positively impact attributes

- Those with recall of the advertising are more positive about OMHT across all the attributes tested.
- The implications of this will be explored later in the report in terms of targeting, but the attributes with the most impact included:
 - Easy to get to
 - Unique winery scene
 - Upscale destination
 - Good value for the money
- But there are a number of impacts that could be leveraged to attract more visitors and more overnight visitors, depending on targeting decisions.
- The impact does differ by geography somewhat, but again this will be explored in terms of targeting later in the report.

Attribute	OMHT unaware	OMHT aware	Difference
Is easy to get to	3.4	3.9	0.5
Has a unique winery scene	3.2	3.7	0.5
Is an upscale destination	3.2	3.7	0.5
Is a good value for the money	3.5	4.0	0.5
Is a pet-friendly place	3.4	3.8	0.4
Is a child-friendly vacation destination	3.5	3.9	0.4
Is a good weekend getaway destination	3.6	4.0	0.4
Has unique dining experiences, including farm-to-table cuisine and farm dinners	3.4	3.8	0.4
Offers lodging options that meet my needs	3.6	4.0	0.4
Is rich in history and heritage	3.6	4.0	0.4
Is a good place to visit farms and experience agritourism	3.4	3.8	0.4
Has a unique craft brewery scene	3.3	3.7	0.4
Is an eco-friendly, sustainable community	3.6	3.9	0.4
Is a good destination for adults and couples to visit	3.8	4.1	0.3
Is an open and welcoming place for all people to visit	3.8	4.1	0.3
Is a good place to explore	4.0	4.2	0.3
Is a good place to relax and unwind	3.9	4.1	0.2
Is a good place for active adventure	4.0	4.2	0.2
Has beautiful forests and natural scenery	4.1	4.2	0.2
Is a good place for outdoor recreation	4.1	4.2	0.2

Ads effectively drive overnight visits

- The difference between overall unaware and aware visitation (the level of visitation attributable to the ads) was 3 points in 2013 and is 6 points now.
- The current messaging is effective at driving overnight visits versus merely influencing day visits – and more so than the 2013 campaign, where there was a 2-point increase in overnight visits (3% to 5%), compared to a 7-point increase now (3% to 10%).



* Numbers may not add up due to rounding

Recent visits: Please click on the map to show which region(s) in Oregon you have visited in the past 2 years. [If Mt. Hood/The Gorge selected] Within the Mt. Hood/The Gorge region, please click on the areas you have visited in the past 2 years.

Overnight visits: How many nights did you spend in Oregon's Mt. Hood Territory? *Shown are trips over 0 nights.*

Ads drive larger parties and families

- Other positive impacts of the ads are larger travel parties, more travel parties that include children, and a slight increase in number of trips.
- One dynamic that SMARInsights has seen is that destination advertising generates interest in the destination and causes consumers to do more research prior to their trip – and this results in more repeat visitation, longer trips and, often, participation in more activities.
- Those aware of the advertising were also more likely to take an overnight trip in the area, versus a daytrip.

	2013	2016	
		Unaware	Aware
Travel party	2.5	2.6	4.8
Number of activities	3.8	4.9	5.1
Brought children	18%	19%	41%
Number of trips	1.7	1.9	2.0
% overnight trips	77%	76%	88%

Travel party: Thinking about your [MONTH/YEAR] trip, how many people traveled with you to Oregon's Mt. Hood Territory?

Number of activities: Which of the following places or activities did you visit or participate in as part of your trip? Select all that apply. *Shown is average count of all selected.*

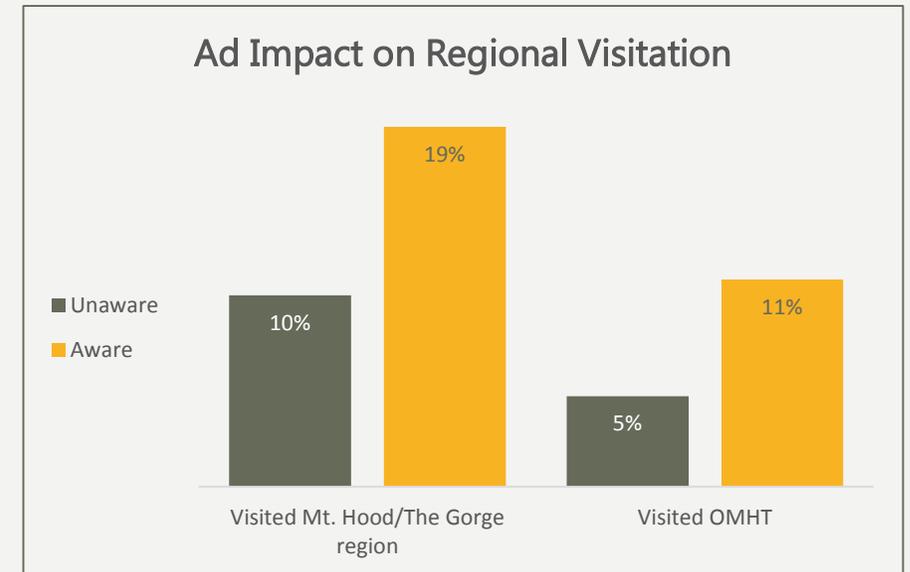
Brought children: Who traveled with you to Oregon's Mt. Hood Territory? Select all that apply. *Shown are Child/ren under the age of 18.*

Number of trips: When did you visit Oregon's Mt. Hood Territory? Nov 2014 – Oct 2016. *Shown is count of months indicated.*

Overnight visits: How many nights did you spend in Oregon's Mt. Hood Territory? *Shown are trips over 0 nights.*

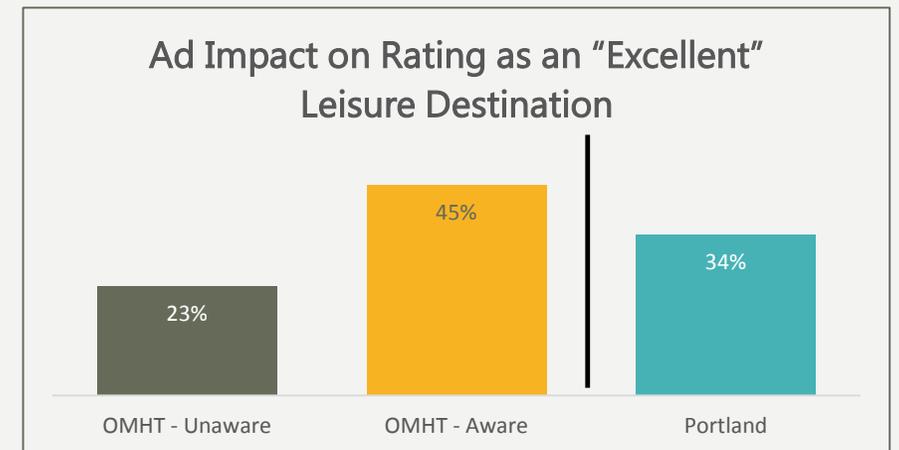
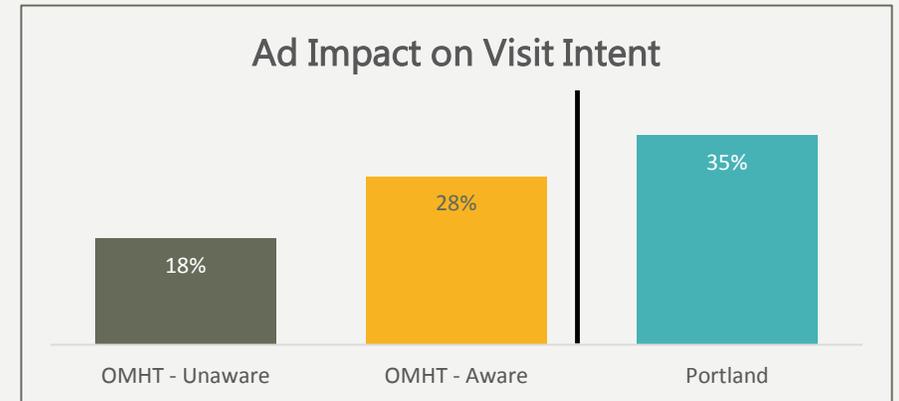
Ads drive visitation to whole region

- As explored in the 2013 research, and as OMHT/Clackamas County is aware, it can be difficult for travelers – particularly long-haul travelers – to discern between OMHT and Mt. Hood itself or other area destinations. While OMHT is eager to know who visited attractions within its borders, consumers are focused on their travel experience and not on whether they are crossing county lines. While this can be frustrating from a marketing and measurement standpoint, it also presents an opportunity for partnership.
- Because few travelers beyond the immediate vicinity are able to discern the boundaries within The Gorge region, OMHT could benefit from cooperative advertising and product packaging with other destinations in the surrounding region.
- Ad awareness is associated with higher visitation of Mt. Hood/The Gorge region as a whole, which is a selling point to neighboring destinations to advertise jointly with them.



Ads drive “excellent” rating of OMHT vs. Portland

- Travelers in the markets surveyed* are more likely to visit Portland than OMHT. The ads drive likelihood to visit OMHT higher, but not as high as for Portland.
- Interestingly, likelihood to visit OMHT is highly statistically correlated with likelihood to visit Portland. Excluding the primary markets, this correlation is even higher. This suggests that travelers – particularly those from long-haul markets – would visit both destinations during a trip to the region.
- This presents an opportunity to:
 - Emphasize OMHT’s proximity to Portland in messaging to underscore how easy it is to get to OMHT
 - Develop getaway packages with Portland-based transportation (car rental, rail, etc.) and OMHT lodging options
- Additionally, while unaware travelers are less likely to rate OMHT an “excellent” leisure destination than Portland, those aware of the ads are *more* likely to rate OMHT excellent than Portland. This also indicates movement in a positive direction, and reinforces that the quality of the two destinations’ leisure product is similar and would lend itself to a strategic alliance.



*These may or may not be some of the same markets where Portland advertises.

Recent visits: Please click on the map to show which region(s) in Oregon you have visited in the past 2 years. *Southern Oregon, Oregon Coast, Eastern Oregon, Central Oregon, Greater Portland, Willamette Valley, Mt. Hood/The Gorge*

[If Mt. Hood/The Gorge selected] Within the Mt. Hood/The Gorge region, please click on the areas you have visited in the past 2 years.

Ad awareness drives higher perception of OMHT vs. Portland

- In terms of image, the ads elevate OMHT from having generally lower ratings than Portland to being rated higher than Portland in the markets surveyed.* In particular, OMHT messaging contributes to stronger perceptions of its:
 - Outdoor recreation and agritourism assets
 - Opportunities for active adventure
 - History and heritage
 - Value for the money
- Both destinations receive high ratings for:
 - Being good for adults and couples
 - Being open and welcoming for all
 - Being eco-friendly
- Again, this opens opportunities to work together and promote the area – and give consumers from more distant markets a reason to choose the area over other competing destinations.

	Portland	OMHT unaware	OMHT aware
Has beautiful forests and natural scenery	3.8	4.1	4.2
Is a good place to explore	3.9	4.0	4.2
Is a good place for outdoor recreation	3.8	4.1	4.2
Is a good place for active adventure	3.8	4.0	4.2
Is a good destination for adults and couples to visit	4.0	3.8	4.1
Is a good place to relax and unwind	3.8	3.9	4.1
Is an open and welcoming place for all people to visit	3.9	3.8	4.1
Is a good weekend getaway destination	3.8	3.6	4.0
Is rich in history and heritage	3.7	3.6	4.0
Is a good value for the money	3.6	3.5	4.0
Offers lodging options that meet my needs	3.9	3.6	4.0
Is an eco-friendly, sustainable community	3.8	3.6	3.9
Is easy to get to	3.8	3.4	3.9
Is a child-friendly vacation destination	3.5	3.5	3.9
Has unique dining experiences, including farm-to-table cuisine and farm dinners	3.8	3.4	3.8
Is a pet-friendly place	3.6	3.4	3.8
Is a good place to visit farms and experience agritourism	3.4	3.4	3.8
Has a unique winery scene	3.5	3.2	3.7
Has a unique craft brewery scene	3.8	3.3	3.7
Is an upscale destination	3.6	3.2	3.7

*These may or may not be some of the same markets where Portland advertises.

How much do you agree that the following statements describe Greater Portland / Oregon's Mt. Hood Territory? 5=Completely describes, 4=Describes well, 3=Neutral, 2=Does not describe well, 1=Does not apply at all

Ad recall varies by market, with nearby markets showing stronger recall

- Ad awareness varies by market, from a high of 35% in Portland area to a low of 17% in Austin. Recall is similar among consumers in Washington state and California.





VISITORS & POTENTIAL VISITORS

2016 BRAND HEALTH TRENDING &
OVERNIGHT VISITOR STUDY

Visitors & likely visitors

- As part of its charge to achieve optimal economic benefit from tourism, CCTCA is eager to drive not just any visits but particularly overnight visits using paid accommodations in OMHT. A tremendous asset in this effort is the strength of the leisure product OMHT and its partners offer. The challenge is maximizing ROI by focusing marketing efforts on those travelers most likely to be appealed to by this product.
- There are three main elements to this strategy that inform creative executions and media buys:
 - Target Travelers – to whom to aim marketing messaging for maximum likely success; also has implications for behavioral and contextual targeting of digital buys
 - Product – what aspects of the OMHT product is most appealing to the target audience
 - Messaging – what to communicate to travelers to pique their interest and inspire them to research and book travel to OMHT
 - Geographic markets – where there are concentrations of visitors and potential visitors that can be easily targeted with marketing and advertising
- In conducting this study, we identified 180 visitors to the area, with the majority of those from Oregon. To be able to explore options for attracting visitors from other areas and better understanding potential, **the following considers both past visitors to Clackamas County as well as “likely visitors” – and that group is labeled as Target.** Likely visitors are those who said they are already planning a trip to the area, or are “very likely” to visit. This provides a larger, more geographically diverse base to evaluate.

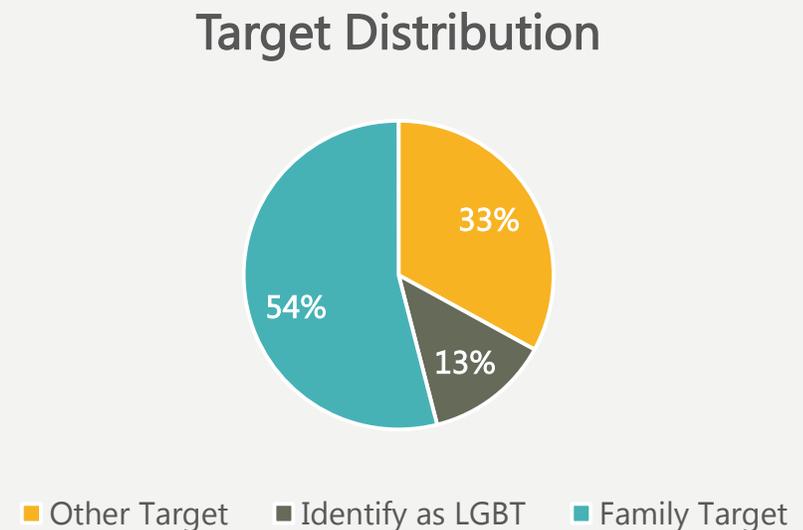
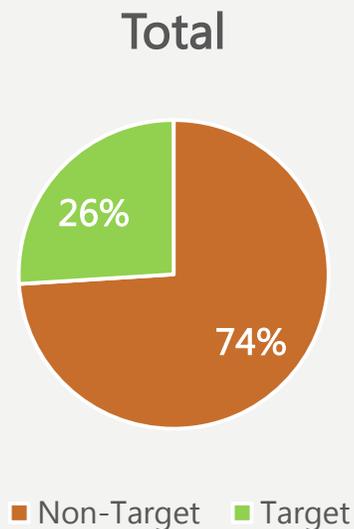
Target traveler profile

- As with familiarity and recent visitation, much of the top-line data on visitors is the same in this measure as in 2013. Given the high level of unfamiliarity in non-proximate markets, and the expense of widely broadcasting messaging to all geographies, SMARInsights sought to identify the target audiences most likely to visit OMHT.
- The table compares non-visitors to past visitors and the target (which includes past visitors and likely visitors). This group is more likely to:
 - Have children at home
 - Have larger household size
 - Be younger
 - Have a post-graduate degree
 - Be married
 - Be white
 - Identify as LGBT

	Non-Visitor	Visitors	Target
Children in household	35%	46%	60%
18-34 years	29%	35%	40%
35-54 years	36%	39%	39%
55+ years	34%	26%	21%
Post-graduate degree	23%	27%	36%
Married	62%	68%	75%
White/Caucasian	76%	84%	86%
LGBT	7%	13%	12%

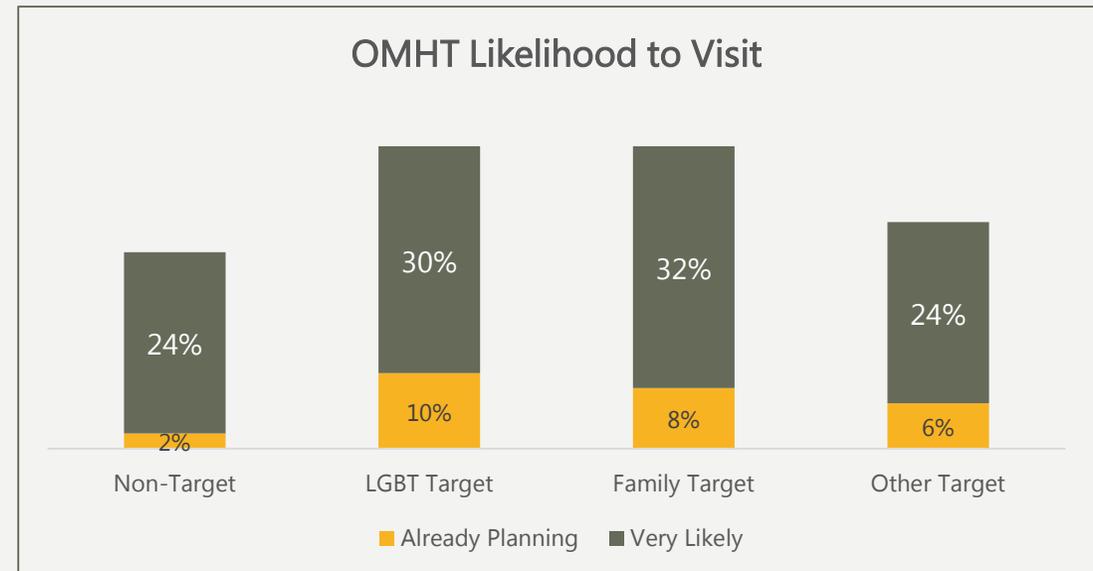
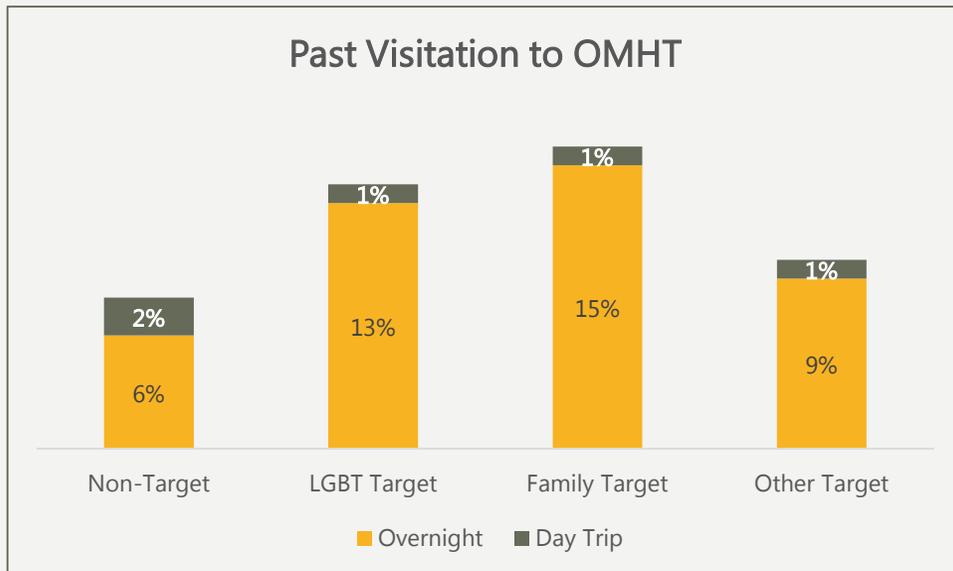
Target groups

- The chart on the left below illustrates that the target represents 26% of the total. These are the most likely visitors to OMHT (past visitors and likely visitors).
- The target breaks down into two actionable targets: family (non-LGBT) and LGBT (family and non-family.) These represent 67% of the target. Of note is that 77% of the LGBT target has families.
 - The remaining third of the target is diverse and not as easily classified or considered as a group.



Target travelers more likely to visit

- Already visit OMHT more than the general traveling population, and are more likely to stay overnight
 - Have higher intent to visit OMHT in the coming year
- The following will look at target travelers in more detail and will explore the family target and the LGBT target.



Recent visits: Please click on the map to show which region(s) in Oregon you have visited in the past 2 years. [If Mt. Hood/The Gorge selected] Within the Mt. Hood/The Gorge region, please click on the areas you have visited in the past 2 years.
 Visit intent: How likely are you to take a leisure trip to [Oregon's Mt. Hood Territory] in the next year?

How to motivate target travelers?

- While it is helpful to identify potential likely travelers, and the demographic information is useful in purchasing media to target this audience, it is critical to have a deeper understanding of this audience.
- Product – it is important to understand what aspects of the OMHT product appeals to the audience and will increase their likelihood to visit.
- Attitude – The research identified “eco-travelers,” based on attitudes about the destination that influence selection. So, the report considers the targets in terms of their identification as an eco-traveler.

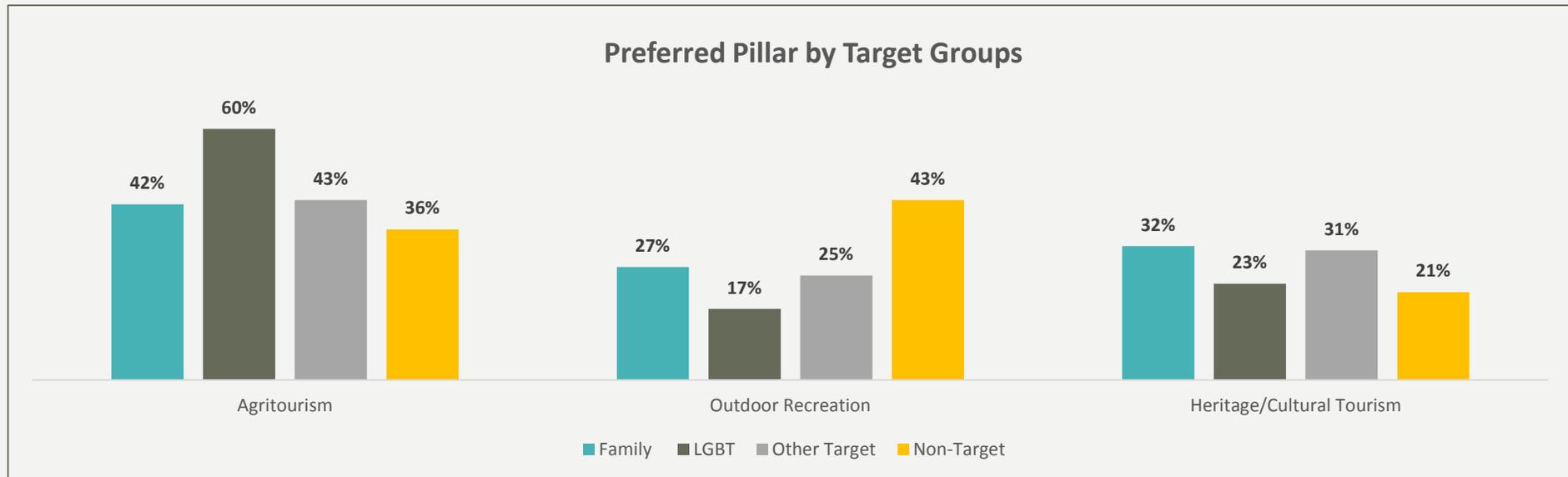
OMHT's three pillars

Outdoor Recreation	Agritourism	History, Heritage and Culture
Is a good place for outdoor recreation	Is a good place to visit farms and experience agritourism	Is rich in history and heritage
Has beautiful forests and natural scenery	Has unique dining experiences, including farm-to-table cuisine and farm dinners	
Is a good place for active adventure		

- Outdoor recreation; agritourism; and history, heritage and culture are the three pillars on which OMHT is building its brand. Specific attributes are related to each of these pillars and help classify OMHT product offerings. (Factor analysis was used to identify which attributes were grouped together by consumers for these pillars.)

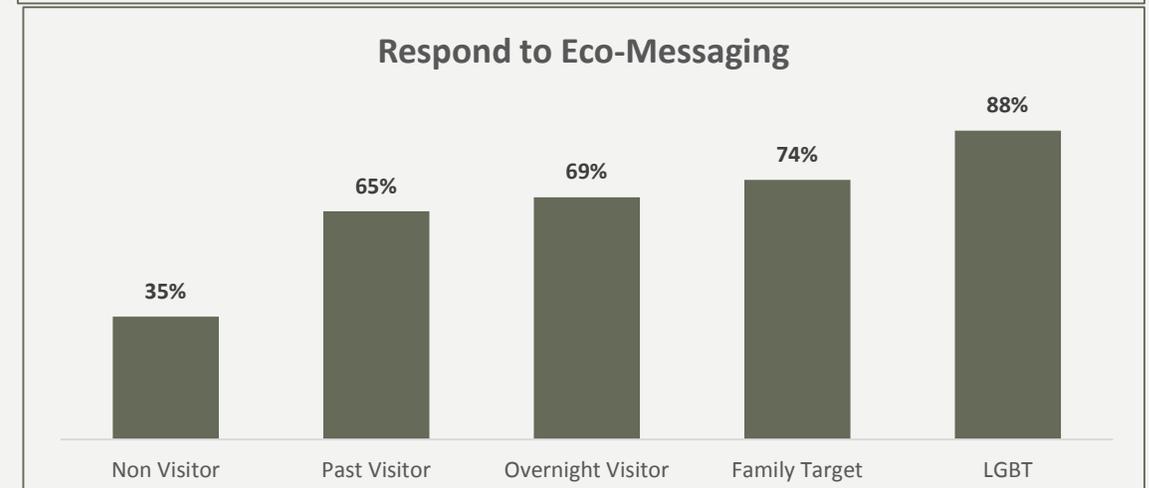
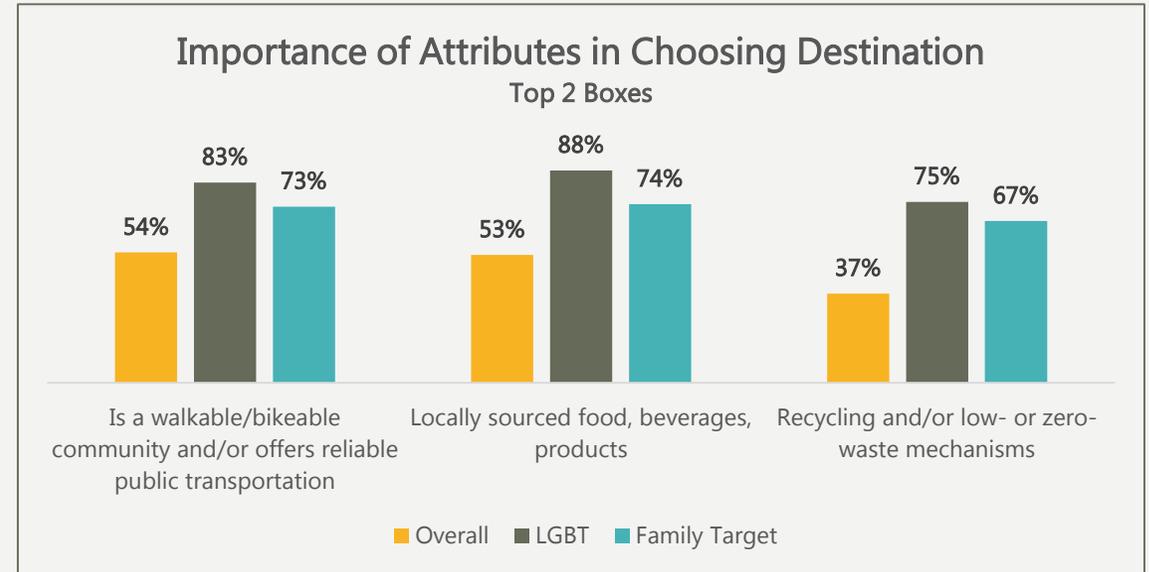
Target travelers: preferred product

- Statistical analysis was used to correlate interest in the three pillars to interest in visiting OMHT. Then, potential visitors were categorized based on which pillar had the strongest correlation with an increased interest in visiting. The goal was to understand which of the three pillars was most appealing and most likely to lead to visitation, and more specifically overnight visitation.
- For both the family and LGBT targets, the strongest correlation was with agritourism. Sixty-seven percent of the LGBT target and 46% of the family target were more likely to visit based on positive perceptions of OMHT as a good place for agritourism. Positive perceptions as a place for heritage and cultural tourism had the next-strongest impact for the family group, while positive perceptions about outdoor recreation had the second-most impact on both the LGBT target.



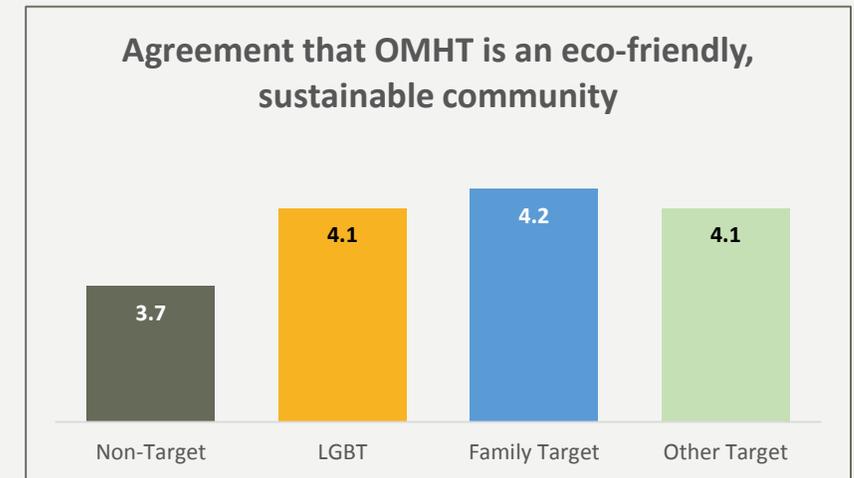
Eco-messaging important to target

- The current research sought to validate whether OMHT was more appealing to travelers who are particularly concerned with the environment and minimizing their impacts on it. Three questions (shown in the top graph) were articulated to identify such travel concerns.
- Half the survey respondents gave a top-2 rating (high importance) to at least two of these three travel questions, indicating that these issues are important when they are choosing a destination.
- Interest in these issues is higher among overnight visitors.
- Plus, potential visitors – both the family and the LGBT target – indicate these are important messages to them.



Target travelers view OMHT as eco-friendly

- Eco-friendliness is more important to target travelers than it is to others, and target travelers also recognize OMHT's strengths in this area more than other travelers do.
- Messaging that features OMHT's locally sourced food, beverages, and products, as well as its environmentally responsible transportation options, will be particularly relevant to potential visitors and should be promoted.



Activity-based messaging

- Another way to consider what to say to the target audiences is to look at past visitors and what they did in the area. These tables show the top activities reported by past visitors in the family target and the LGBT target.
- The LGBT visitors report a mix of outdoor and cultural activities – with those that could fall into agritourism, such as local restaurants and wineries.
- The family visitors report more participation in agritourism related activities (local restaurants, farmers’ market, winery and farm tour), but also a mix of outdoor and cultural activities.
- The activity information can be used to refine targeted messages to these groups.

LGBT Visitors	% Participated
Scenic drive	53%
Family attraction	33%
Art gallery	27%
Park (national, state, etc.)	27%
Cultural event	26%
Walking tour	26%
Biking/mountain biking	23%
Fair/festival	23%
Museum/historical site	23%
Local restaurant	22%
Winery	21%

Family Visitors	% Participated
Local restaurant	51%
Park (national, state, etc.)	49%
Shopping	41%
Scenic drive	40%
Walking tour	39%
Family attraction	38%
Hiking/backpacking	34%
Museum/historical site	28%
Farmers’ market	27%
Horseback riding	24%
Biking/mountain biking	22%
Winery	21%
Art gallery	20%
Fishing	19%
Farm tour or visit	16%

Which of the following places or activities did you visit or participate in as part of your trip? Select all that apply.



INSIGHTS

2016 BRAND HEALTH TRENDING &
OVERNIGHT VISITOR STUDY

Insights

- OMHT's marketing efforts are working – awareness is up from the 2013 measure, and among travelers aware of the ads, there is higher familiarity, more positive image and greater likelihood to visit OMHT.
- To further develop and expand its successful marketing program, OMHT should consider:
 - Co-op advertising and product packaging with other destinations within The Gorge. OMHT ads are already benefiting the region, and more visitation to the area will represent a gain to individual businesses and communities.
 - Developing getaway packages with Portland-based attractions and/or transportation providers alongside OMHT lodging. A strategic alliance with Portland will broaden the appeal of the area to include both an urban element and an agritourism experience.
- The **target audience** – travelers with a propensity to visit OMHT – is more likely than other travelers to:
 - Be younger, highly educated families representing more than two-thirds of the people who are past visitors, or who are likely to visit the area
 - Among this target, there is a sub-segment that identifies as LGBT. Seventy-seven percent of the LGBT visitors were families.
- This suggests that focusing on how to attract and welcome families of all types is a good way to increase visitation.

Insights – Messaging

- Focus on eco-tourism message and agritourism product to drive overnights.
 - Feature OMHT’s eco-friendliness – especially locally sourced food, beverages and products and being walkable/bikeable/offering public transportation. This message dovetails nicely with a Portland transport partnership for those who fly into Portland and could be developed into bus transport from the airport and/or weekend bike rentals for travel within OMHT.
 - Agritourism is more appealing than other pillars to both the family visitors – so farm-to-table dining, winery tours and farmers’ markets would all be elements to feature in ads aimed at this audience, as well as the target overall. It also might be useful to further explore how consumers define an agritourism experience, and what experiences they want. This will help refine how best to use this platform to attract additional visitors.
 - OMHT’s rich arts and heritage/cultural tourism offerings can be promoted in-market, and could be included in broader messaging as supports to the community’s agritourism and sustainability commitment.
 - In the context of agritourism, show target travelers what OMHT has to offer in terms of outdoor activity – biking, horseback riding, snow sports – but frame those activities as part of the experience, rather than as the only reason to go.
 - The beauty of the area is a key element of attracting visitation, but it is already well-known. This message remains important and should be the backdrop/cornerstone of the marketing, with promotion of the agritourism experience layered on top of the beauty and accessibility to Mt. Hood.



QUESTIONNAIRE

2016 BRAND HEALTH TRENDING &
OVERNIGHT VISITOR STUDY

Oregon's Mt. Hood Territory (bpm)
2016 Brand Health Trending & Overnight Visitor Study
 Final 9-26-2016
 Goal field date: October 3 (soft launch)

SCREENERS

S2. What is your ZIP code? _____

S1. Who in your household is primarily responsible for making decisions concerning travel destinations?

- 1 – Me
- 2 – Myself and my spouse/partner
- 3 – My spouse/partner [TERMINATE]

S3. What is your age? _____ [IF UNDER 18 → TERMINATE]

S4. Please indicate which of the following describe you.

[ROTATE]	YES	NO
I use video streaming services like Hulu or Netflix.		
I regularly engage in some form of physical exercise like walking, biking or participating in sports to stay healthy		
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home		[TERMINATE IF NO]
I regularly use social media like Facebook, Twitter, or Instagram		
None of these apply to me [ANCHOR, EXCLUSIVE]		

ECO-TRAVELER IDENTIFICATION

A. Please rate how important the following considerations are to you when selecting a place to visit for a leisure trip:

[ROTATE]	Not at all important					Very important
	1	2	3	4	5	
Locally sourced food, beverage, and products are available						
Recycling and/or low- or zero-waste mechanisms are in place						
Is a walkable/bikeable community and/or offers reliable public transportation						

FAMILIARITY WITH AND PRIOR TRAVEL TO OMHT

1. Please select the statement that best describes how much you know of each of the following destinations. [ROTATE – SHOW MAP FOR REFERENCE]



[ROTATE]	I've never heard of this place	I've only heard the name	I've heard the name and have heard, read or seen something about this place	I feel like I know a bit about the destination	I feel I know a lot about it
	1	2	3	4	5
Oregon's Mt. Hood Territory					
Southern Oregon					
Oregon Coast					
Eastern Oregon					
Central Oregon					
Greater Portland					
Willamette Valley					
Mt. Hood/The Gorge					

2. Please click on the map to show which region(s) in Oregon you have visited in the past 2 years. [SHOW MAP FROM <http://traveloregon.com/cities-regions/> WITH LABELS – KEEP HIGHLIGHT-ON-HOVER FEATURE – COMPETITIVE SET ONLY]

- Southern Oregon
- Oregon Coast
- Eastern Oregon
- Central Oregon
- Greater Portland
- Willamette Valley
- Mt. Hood/The Gorge

2A. [IF CHOSE MT. HOOD/THE GORGE IN Q2, ASK 2A] Within the Mt. Hood/The Gorge region, please click on the areas you have visited in the past 2 years. [SHOW Q2A MAP – USE.jpg]



1. Oregon's Mt. Hood Territory [IF CLICK HERE = "VISITOR"]
2. Hood River County
3. The Dalles area
4. West Columbia Gorge

3. How likely are you to take a leisure trip to either of the following destinations in the next year?

[ROTATE]	Not at all likely – 1	Not very likely – 2	Somewhat likely – 3	Very likely – 4	Already planning a trip – 5
Oregon's Mt. Hood Territory					
Greater Portland					

4. How would you rate each of these destinations as a place to visit for a leisure trip?

[ROTATE]	Poor – 1	2	3	4	Excellent – 5	Don't know – 9
Oregon's Mt. Hood Territory						
Greater Portland						

Now we'd like you to consider a couple of these destinations in more detail and rate them in terms of how much each of these statements apply to this destination.

5. [ASK ABOUT OMHT AND/OR GREATER PORTLAND IF Q1 >1]

How much do you agree that the following statements describe [DESTINATION]?

[ROTATE]	Completely describes destination – 5	Describes destination well – 4	Neutral – 3	Does not describe well – 2	Does not apply at all – 1
Is easy to get to					
Is a good destination for adults and couples to visit					
Is a child-friendly vacation destination					

Is rich in history and heritage					
Has a unique craft brewery scene					
Has a unique winery scene					
Is a good place to visit farms and experience agritourism					
Offers lodging options that meet my needs					
Is a good value for the money					
Has beautiful forests and natural scenery					
Is a good place for outdoor recreation					
Has unique dining experiences including farm-to-table cuisine and farm dinners					
Is an upscale destination					
Is a good weekend getaway destination					
Is a good place for active adventure					
Is a good place to relax and unwind					
Is a good place to explore					
Is a pet-friendly place					
Is an open and welcoming place for all people to visit					
Is an eco-friendly, sustainable community					

[IF NOT VISITOR, SKIP TO AD SECTION]

TRIP DETAILS

Earlier you mentioned that you had visited Oregon's Mt. Hood Territory within the past 2 years. Now we want to ask you some questions about that trip. Please give us some information about the trip(s) you took to Oregon's Mt. Hood Territory.

6. When did you visit Oregon's Mt. Hood Territory? [ACCEPT MULTIPLES – SHOW WITH YEAR 2014-15 / 2015-16]

- November 2014
- December 2014
- January 2015
- February 2015
- March 2015
- April 2015
- May 2015
- June 2015
- July 2015
- August 2015
- September 2015
- October 2015
- November 2015
- December 2015
- January 2016
- February 2016
- March 2016
- April 2016

May 2016
June 2016
July 2016
August 2016
September 2016
October 2016

[SHOW TRIPS INDICATED IN Q6 FOR Q6a AND Q6b] For each of these trips, please tell us:

6a. How many nights did you spend in Oregon's Mt. Hood Territory?

- 0 nights (Day trip only)
- 1 night
- 2 nights
- 3 or more nights

6b. What was the primary purpose of this trip? [ROTATE]

- General leisure trip
- To explore arts, heritage and/or culture
- To experience agritourism, wineries, and/or farms
- Outdoor recreation
- Snow sports
- Unique culinary experience
- Sightseeing
- Visit friends/family
- Team sports
- Event or festival
- Combination of business and pleasure
- Other, please specify _____
- Don't remember

6AA. [SHOW MONTHS/YEARS SELECTED IN Q6 IF MORE THAN 1] Which of these trips do you consider to be your MAIN trip to Oregon's Mt. Hood Territory? If all trips are considered main trips, please select your most recent trip.

[TRIP MONTH/YEAR SELECTED IN Q6AA IS FOCUS OF Q7-12A]

7. Thinking about your [MONTH/YEAR] trip, how many people traveled with you to Oregon's Mt. Hood Territory? _____

8. [ASK IF Q7>1] Who traveled with you to Oregon's Mt. Hood Territory? Select all that apply.

- Spouse/Partner
- Adult relatives
- Adult friends or acquaintances
- Child(ren) under the age of 18
- Business associates / co-workers
- Members of a sports team
- Members of a school group
- Members of other organization / group
- None of the above

5

9. How did you travel to the area? Select all that apply.

- Own car
- Rental car
- RV/camper
- Motorcycle
- Train
- Air
- Bicycle
- Other, please specify _____
- Don't recall

9A. [ASK OF TRIP WHERE Q6_1 > 0] What was the main form of lodging you used during your Oregon's Mt. Hood Territory trip?

- Hotel / motel
- Bed & Breakfast
- Vacation rental
- RV park
- Campground
- Dorm
- Timeshare
- Stayed with friend/relative
- Other, please specify _____

10. Which of the following places or activities did you visit or participate in as part of your trip? Select all that apply. [ROTATE]

- Farmers' market
- Local restaurant
- Winery
- Brew pub
- Farm tour or visit
- Park (national, state, etc.)
- Hiking/backpacking
- Biking/mountain biking
- Rafting/water sports
- Fishing
- Horseback riding
- Snow sports (skiing, snowboarding, snowmobiling, etc.)
- Other sporting event (watched or participated in)
- Museum/historical site
- Performing arts
- Walking tour
- Art gallery
- Fair/festival
- Cultural event
- Scenic drive
- Shopping
- Family attraction
- Other, please specify _____
- None of the above

6

11. [SHOW ACTIVITIES CHOSEN IN Q10.] Of these activities, please indicate if there were any that were a major influence when you selected Oregon's Mt. Hood Territory as the destination for this trip. You may choose up to 3.

12. Overall, how would you rate the experience you had in Oregon's Mt. Hood Territory? Would you say it was...?
 5: Excellent
 4: Very good
 3: Good
 2: Fair
 1: Poor

12A. Can you tell us why you rated your experience as [INSERT RATING FROM Q12]? _____

ADVERTISING

Now we would like you to view some different forms of advertising. Please review each ad carefully and answer the questions that follow.

[SHOW ADS TO PRIMARY & SECONDARY MARKETS + AUSTIN; SHOW EACH AD FOLLOWED BY Q AD1 ON SAME SCREEN WITH AD]

Ads at: [I:\Ads Master\bpn - Mt Hood Oregon\2016 ads](#)

VIDEO ADS

	
Oregon's...(1).mp4 https://youtu.be/-8KNL_6hpNY	Oregon's...(2).mp4 https://youtu.be/1_EFUshuqU8

PRINT	DIGITAL BANNER	OOH	FACEBOOK [VIDEO]
			
OMHTFY16springsummer_AAIViaFullPagePrint.jpg	OMHT4600_160x600_v1(002).jpg	OMHTFY16winter_busking.jpg	OMHT-FacebookAds.mp4 https://youtu.be/c3_WmtfALF0

AD1. Have you seen this ad or one like it before?
 1: I have seen this or a similar ad before
 0: I have NOT seen this or a similar ad before

13. Now, considering all the ads you've just seen, please indicate how much you agree that these ads make you...

[ROTATE]	Strongly disagree - 1				Strongly Agree - 5
Want to learn more about things to see and do in Oregon's Mt. Hood Territory					
Want to go to the website for Oregon's Mt. Hood Territory or request a brochure					
Want to visit Oregon's Mt. Hood Territory					
Want to include Oregon's Mt. Hood Territory among the top 3 choices for my next leisure trip					

DEMOGRAPHICS [DO NOT FORCE]

The following questions are for classification purposes only so that your responses may be grouped with those of others.

D1. Are you currently?
 Married
 Divorced/Separated
 Widowed
 Single/Never married

D2. Including yourself, how many people are currently living in your household? _____

D2a. [IF D2 IS GREATER THAN 1] How many are children under the age of 18? _____

D3. Which of the following categories represents the last grade of school you completed?
 High school or less
 Some college / technical school
 College graduate
 Post-graduate degree

D4. Which of the following categories best represents the total annual income for your household before taxes?
 Less than \$25,000
 \$25,000 but less than \$50,000
 \$50,000 but less than \$75,000
 \$75,000 but less than \$100,000
 \$100,000 but less than \$150,000
 More than \$150,000

D5. What is your race/ethnicity? [ALLOW MULTI-SELECT]

- White
- Black/African American
- Asian
- Native Hawaiian/Pacific Islander
- American Indian/Native Alaskan
- Prefer not to answer

D6. Are you...?

- Male
- Female

D7. Do you identify as LGBT?

- Yes
- No
- Prefer not to answer