

An Evaluation of  
**Oregon's**  
Fall 2012/Spring 2013  
Advertising Campaigns

Final Report  
May 2014

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# Background



- ◉ Longwoods International was engaged by Travel Oregon to undertake an evaluation of Travel Oregon's Fall 2012 and Spring 2013 tourism advertising campaigns.
- ◉ The program consisted of two individual campaigns: Fall Bounty and Spring Outdoor Adventure.
- ◉ Bounty appeared on TV and online, while Outdoor Adventure was on TV, online and print.
- ◉ The ads were designed to:
  - ❖ *Promote leisure travel to Oregon*
  - ❖ *Encourage traffic to [www.traveloregon.com](http://www.traveloregon.com), the state's tourism website*
- ◉ Oregon's advertising markets included:
  - ❖ *Oregon, Idaho, Washington, California and Vancouver, B.C.*
- Campaign spending totaled \$1.8 million.

# Research Objectives



- ⊙ The purpose of this research is to provide:
  - ⊙ *fundamental strategic insights about the image of Oregon and its key competitors with respect to key destination choice factors;*
  - ⊙ *an evaluation of the Fall 2012 and Spring 2013 tourism advertising campaigns in terms of:*
    - *top line measures:*
      - ⊙ *awareness of the advertising*
      - ⊙ *impact on Oregon's image as a travel destination*
    - *the bottom line return on Oregon's investment in the campaign in terms of:*
      - ⊙ *incremental travel to Oregon*
      - ⊙ *incremental traveler spending in Oregon*
  
      - ⊙ *incremental state and local taxes*

# Research Method



- ⦿ The study was conducted among a representative sample of adult travelers (18+) residing in Oregon's advertising markets.
  - ⦿ *'Travelers' means respondents had taken a day and/or overnight pleasure trip anywhere in the past 3 years and intend to take another in the next 2 years.*
- ⦿ The survey was conducted via a major online consumer panel which is demographically balanced to represent the population in the markets surveyed.
  - ⦿ 1,596 individuals responded to the research

# Research Method (Cont'd)



- The questionnaire addressed three key areas:
  - Oregon's Image as a Travel Destination
    - *respondents rated Oregon and selected competitive destinations across an extensive list of characteristics or destination attributes.*
  - **Travel to Oregon**
    - *respondents reported the number of day and overnight trips they took to Oregon during and shortly after the advertising campaign.*
  - **Advertising awareness**
    - *actual creative from the Fall 2012/Spring 2013 campaigns were exposed and respondents reported recall of each.*
      - *we use this forced exposure approach to ensure that we are measuring the state-sponsored advertising only – not that of Oregon's attractions and accommodation facilities.*

# Executive Summary

# 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**:
  - *the notion of **excitement** comes from being seen as a fun, with a sense of adventure and inspiration*
  - ***adult vacation**, the perceived suitability for adults and couples, is important because they are paying for the trip*
- 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:
  - ***family atmosphere** refers to a destination's perceived appeal for kids and families*
  - *a **worry-free** environment, because being perceived as relaxed and friendly is important*

# Travel Motivators



- ◉ **uniqueness**, including the local people, culture and traditions, and food
- ◉ good **sightseeing**, particularly the overall variety of things to see and do, and beautiful scenery
- ◉ **popularity** as a tourist destination in general; this factor also takes into account how visible the destination is as an advertiser
- ◉ **climate**
- ◉ the opportunities for **entertainment**, including festivals, shopping, theater and events
- ◉ the availability of **luxurious** accommodations and dining
- ◉ **affordability** refers to the costs associated with getting to and staying at a destination as well as the related ideas of travel distance and accessibility:
  - ◉ although relatively unimportant at the wish list stage, cost usually rises in importance the closer one gets to closing the sale

# Travel Motivators



- Relatively low on the priority list are:
  - *opportunities for **sports and recreation***
  - *experiences associated with the **farming** culture*

# Oregon's Image



- Oregon's image strengths versus these competitors as a group are:
  - *coastal and water elements: coastal scenery, whale watching, fishing and beaches*
  - *aspects of the uniqueness factor – locally and organically grown foods, local microbreweries and beer, and sustainable practices*
  - *affordable to reach and not too far away*

# Oregon's Image



- ⊙ Nonetheless, travelers perceive some significant disadvantages to visiting Oregon relative to the competition, the most important of which are:
  - ⊙ *not as exciting as other places*
  - ⊙ *less popular with vacationers overall*
  - ⊙ *not as much variety of things to see and do*
- ⊙ Other major perceptual weaknesses are in the less important areas of:
  - ⊙ *first-class hotels and resorts*
  - ⊙ *elegant, sophisticated restaurants*
  - ⊙ *excellent museums and art galleries*

# 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 edges out Idaho in almost all areas, from great microbreweries and beer and wineries, all aspects of green and sustainable practices and locally grown food to affordability, proximity and being an LGBT-friendly destination. Oregon also excels in attractive urban aspects, such as excellent shopping, theater, arts, and as a great destination for adults and couples.
- ⦿ Idaho is seen as offering better skiing/snowboarding and farm vacations.

# Oregon's Image



- ◉ **Washington State** – Relative to Washington, Oregon excels in opportunities for hiking/backpacking, great local microbreweries and beer, being not too far away to consider for a vacation and beautiful coastal scenery.
- ◉ Washington's strengths relative to Oregon are especially in all aspects of the urban experience, first-class hotels and restaurants, lots to see and do, inspiring people to visit, and being seen as exciting and popular with vacationers in general. Washington also has the edge as a place to attend culinary events.



# Oregon's Image



- **British Columbia**– Oregon is recognized as being closer and more affordable, being a leader in green/sustainable practices, organically-grown food, great microbreweries and beer, outdoor adventure opportunities such as mountain biking, camping and viewing wildlife. Oregon also has the edge in rural exploration: touring wineries, touring by car, picturesque farming country and farm vacations.
- Oregon's perceived weaknesses relative to British Columbia are related to key areas of fun, excitement, popularity and having lots to see and do, as well as a high-end urban experience: first-class hotels and resorts, elegant sophisticated restaurants, excellent museums/art galleries, and interesting cities and people.

# Oregon's Image



- **Colorado** – Relative to Colorado, Oregon's perceived advantages are in its location: affordable and not too far away, its leadership in green and sustainable practices, locally and organically grown foods, and its rural opportunities for a farm vacation in picturesque farming country.
- Colorado's strengths in comparison include the key areas of popularity and lots to see and do, as well as the outdoor adventure of skiing/snowboarding, mountain biking and rafting/kayaking.

# Oregon's Image



- ◉ **Montana** – Relative to Montana, Oregon's perceived advantages include its location: affordable and not too far away, its leadership in green and sustainable practices, locally and organically grown foods, as well as the key aspects of popularity and having lots to see and do. Oregon also leads in great microbreweries and beer, touring wineries, having elegant/sophisticated restaurants and first-class hotels.
- ◉ Montana's strengths in comparison include the key area of adventure, as well as offering a unique vacation experience. Montana has interesting customs and traditions, including Native American, and provides a great place to unwind and disconnect.

# Oregon's Image



- ◉ **California** – Relative to California, Oregon's perceived advantages lie in the coastal experiences of fishing and storm watching, in its affordability, being a great place to unwind and disconnect, and in its rural opportunities for a farm vacation in the picturesque, wholesome farm country.
- ◉ California's strengths in comparison include all ten traveler hot buttons and most of the attributes measured in this study. It should be noted, however, that much of California's image is created by private-sector advertisers such as Disney, Universal Studios and SeaWorld.

# Oregon's Product Delivery



- ⦿ The image ratings we just discussed looked at 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' image of Oregon based on recent experience ("product delivery") compared to the image ratings of those who have never actually visited, i.e., whose perceptions are based on "pure image".

# Oregon's Product Delivery



- ⦿ 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.

# Oregon's Product Delivery



- ⊙ In this survey people who have visited Oregon in the past two years gave Oregon substantially higher ratings for almost 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 the conclusion one could draw is that with such a good product, Oregon has more of an awareness problem than a product problem.

# Oregon's Product Delivery



- ⦿ The greatest differences in “perception vs. reality” are:
  - ⦿ *Oregon's suitability for both couples' getaways and family vacations*
  - ⦿ *The all-important “excitement” factor: a fun and exciting place that everyone should visit at least once*
  - ⦿ *The exceptional scenery*
  - ⦿ *Oregon is not too far away and is affordable to visit*



# Travel Motivators & Hot Buttons

# Travel Motivators

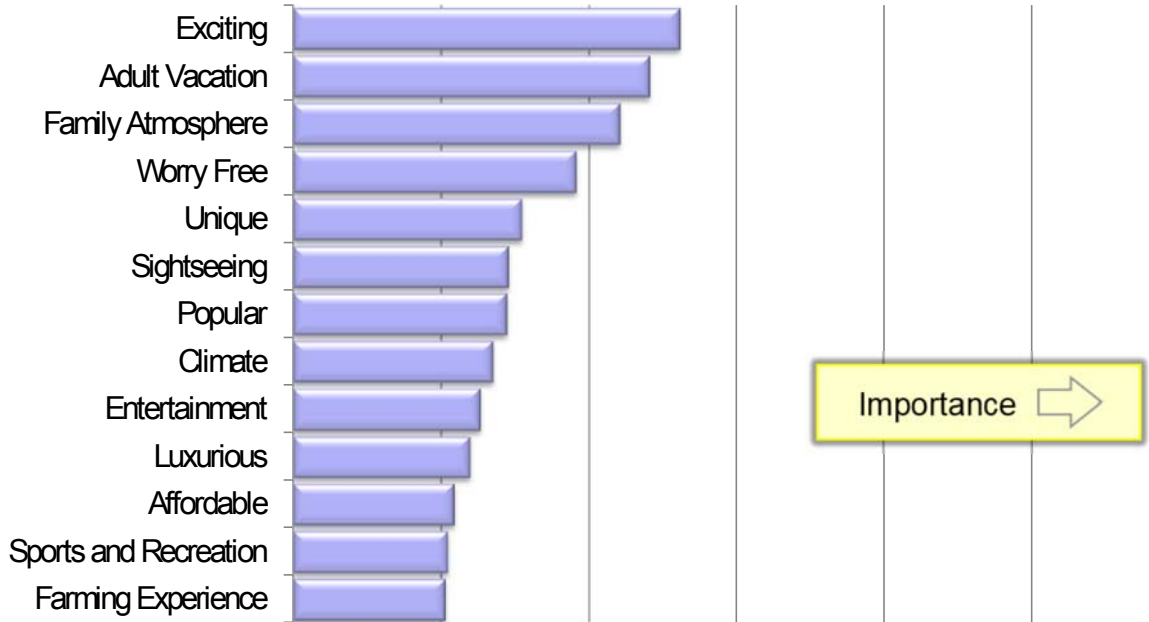


- ◉ In order to determine the key factors that motivate travel and destination of choice, respondents are asked to rate selected states across a robust list of **attributes** or characteristics.
- ◉ Statistical correlations are then used to establish the degree of association between each attribute and 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



Relative Importance\*

# Oregon's Hot Buttons



Base: Residents of Oregon's Regional Advertising Markets

## Top 10 Hot Buttons

I'm inspired to visit this place

A fun place for a vacation

A place everyone should visit at least once

Lots of things to see and do

Great for a family vacation

An exciting place

Great for an adult vacation

Good for a couples getaway

Popular with vacationers

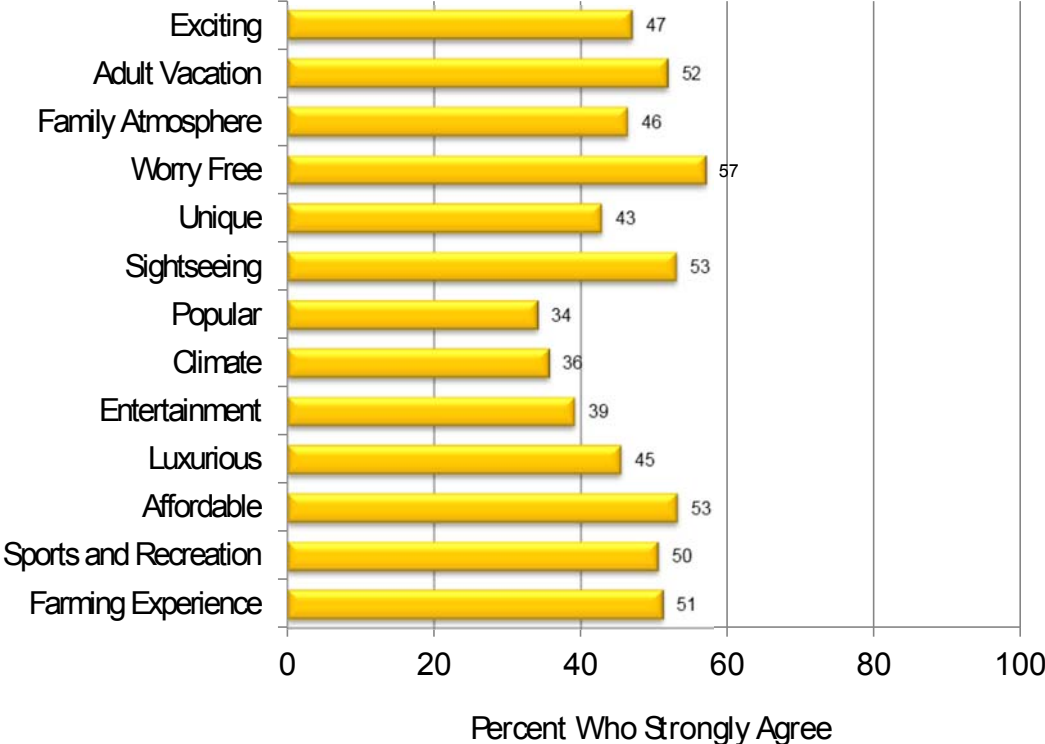
A vacation there is a real adventure

# Oregon's Image vs. the Competition

# Oregon's Overall Image



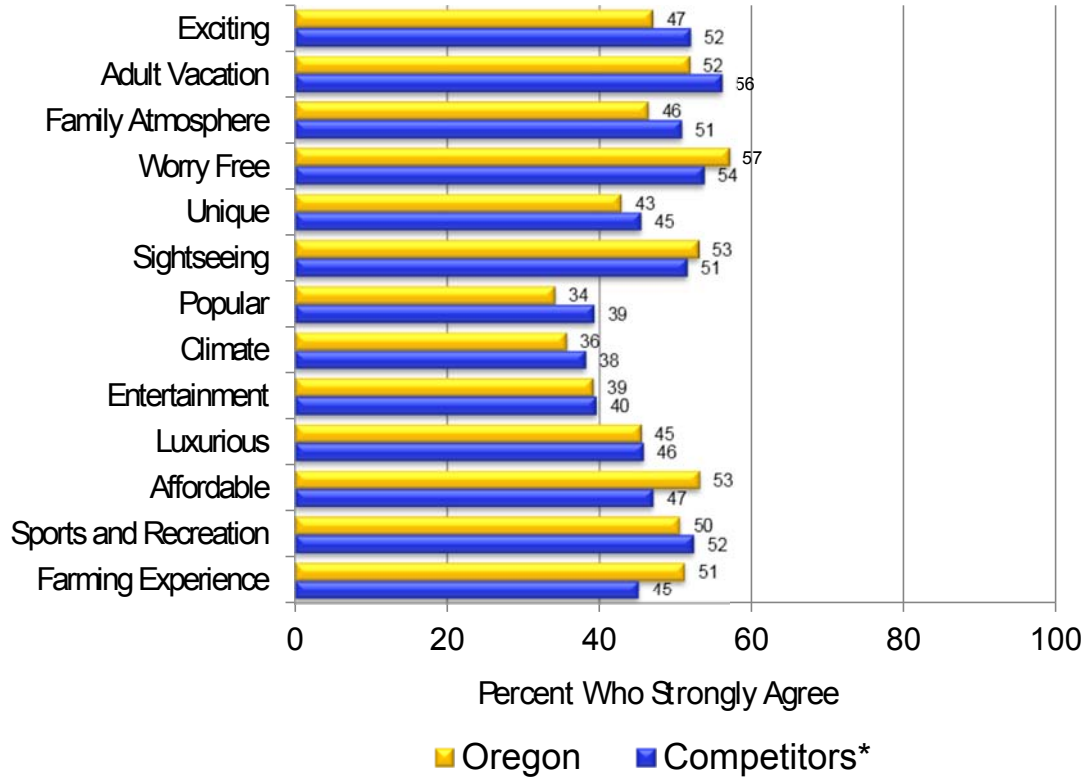
Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Overall Image vs. The Competition



Base: Residents of Oregon's Regional Advertising Markets

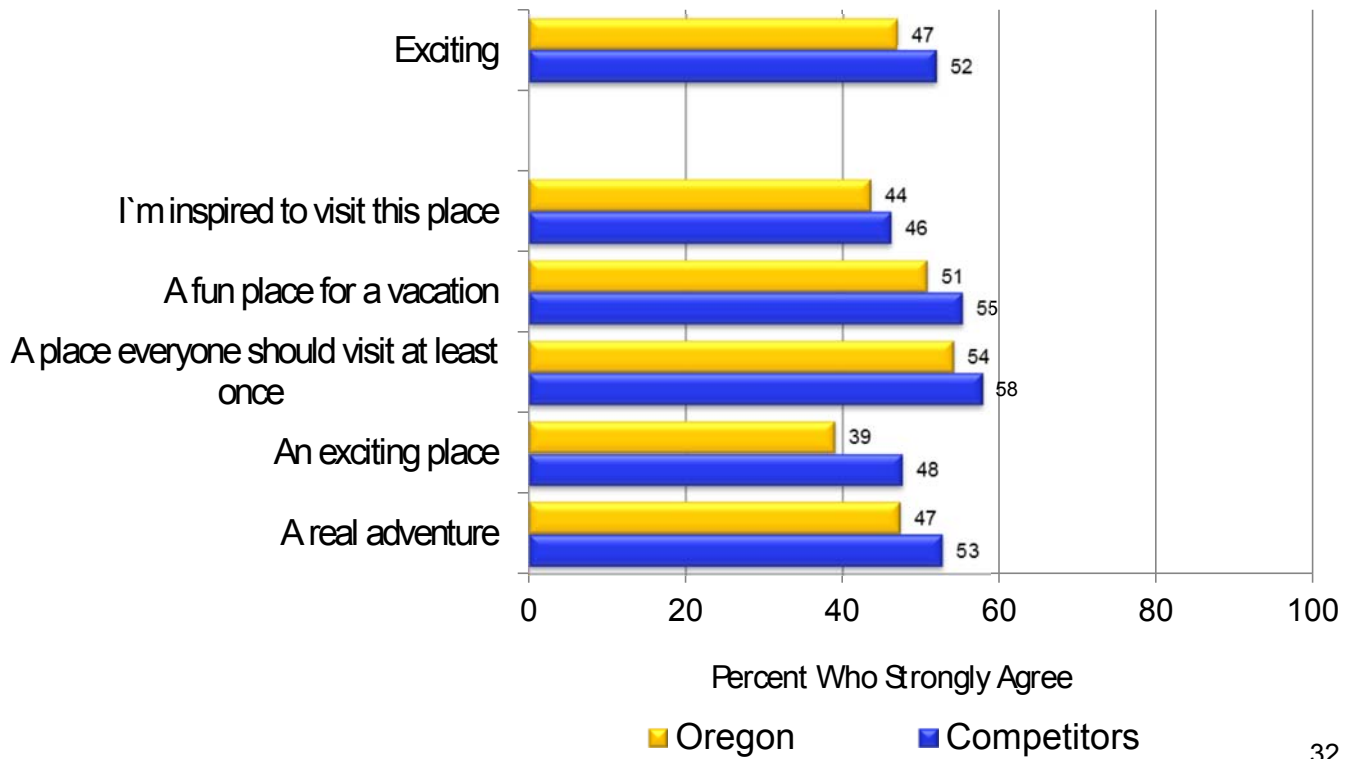


\* Competitors include: Idaho, Washington State, British Columbia, Colorado, Montana, California

# Oregon's Image vs. The Competition — Exciting



Base: Residents of Oregon's Regional Advertising Markets

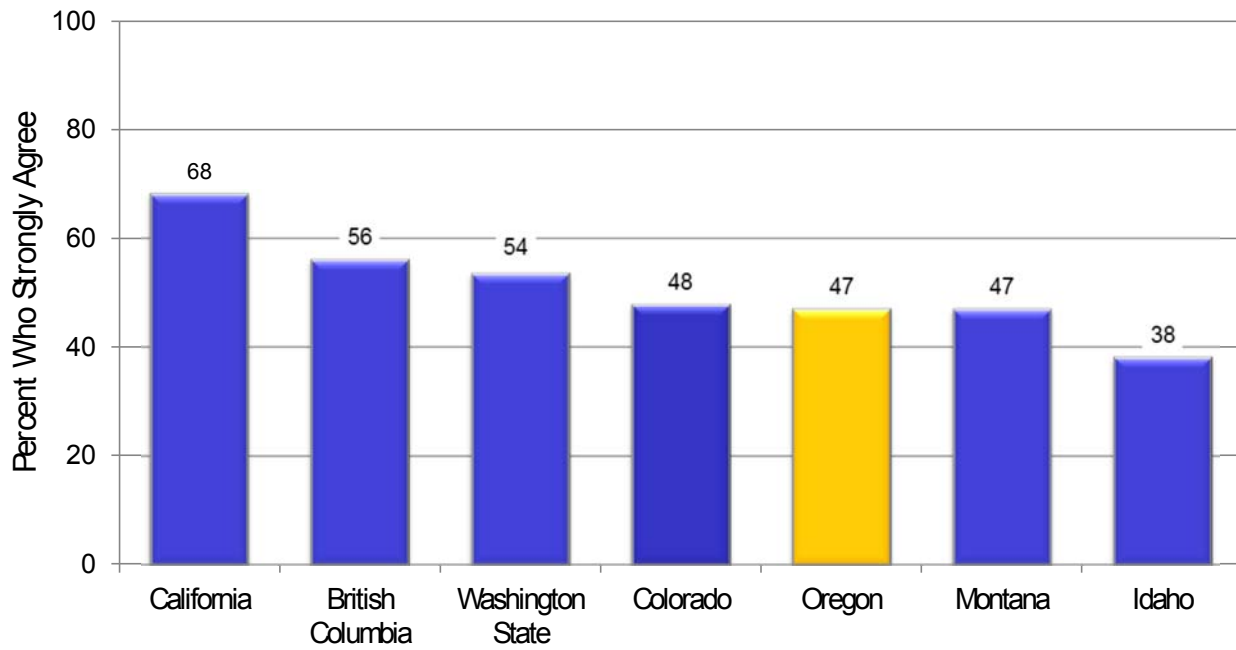




# Oregon's Image vs. the Competition — Exciting



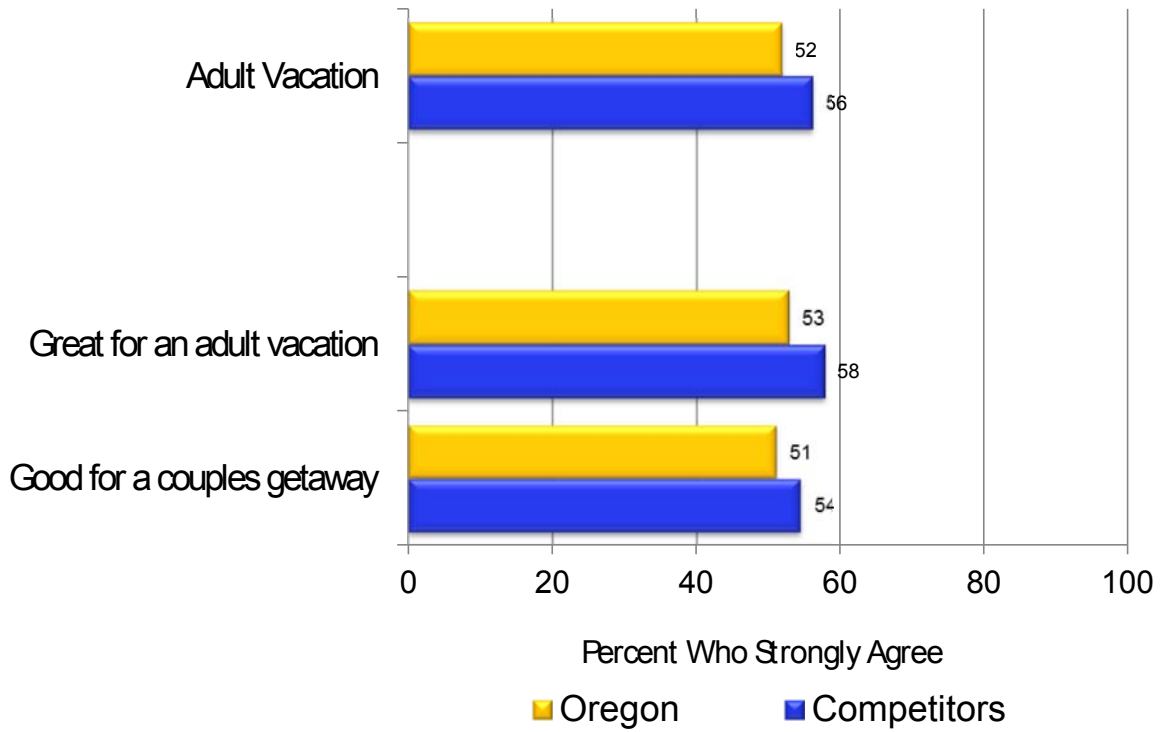
Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image vs. The Competition — Adult Vacation



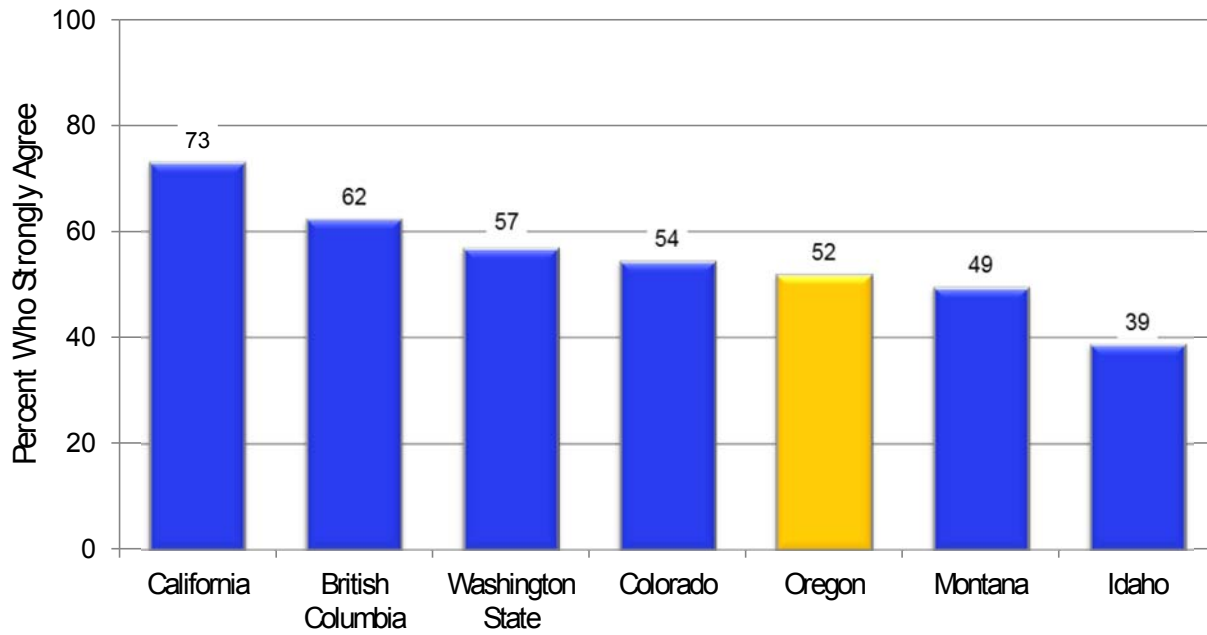
Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image vs. the Competition — Adult Vacation



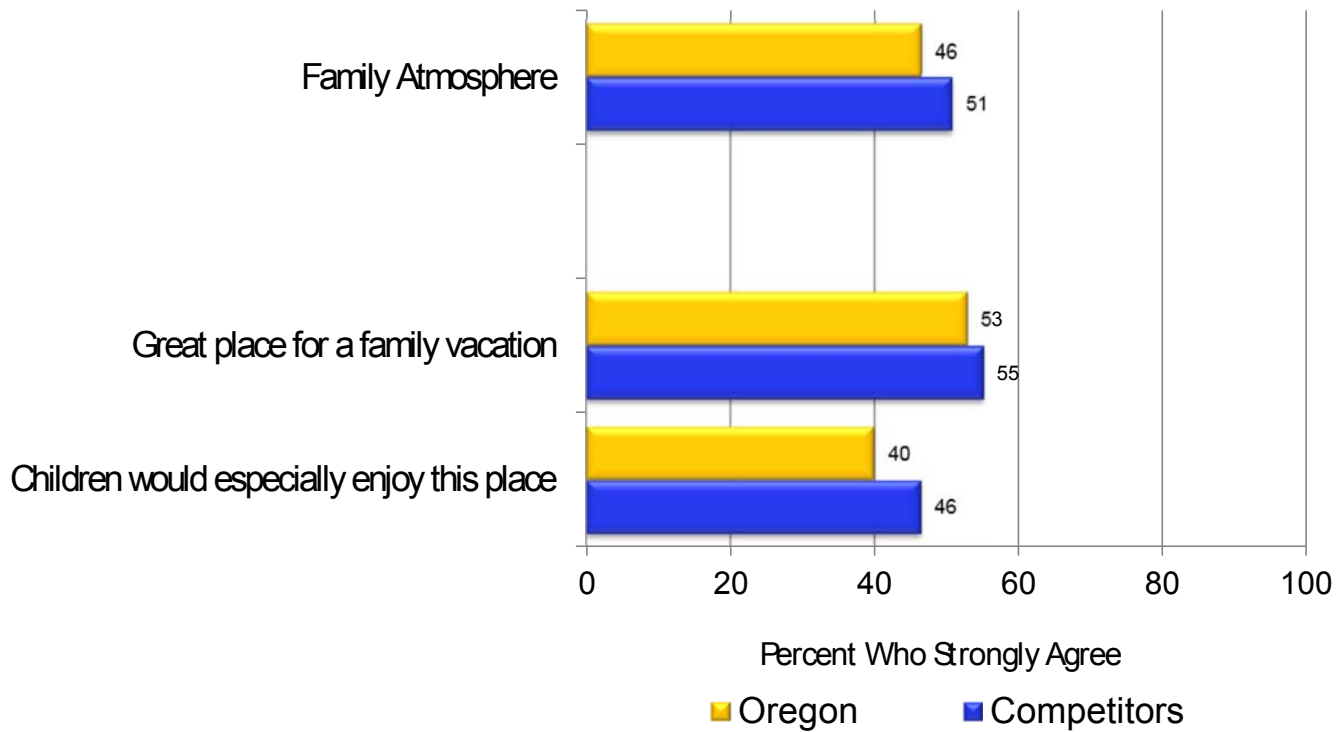
Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image vs. The Competition — Family Atmosphere



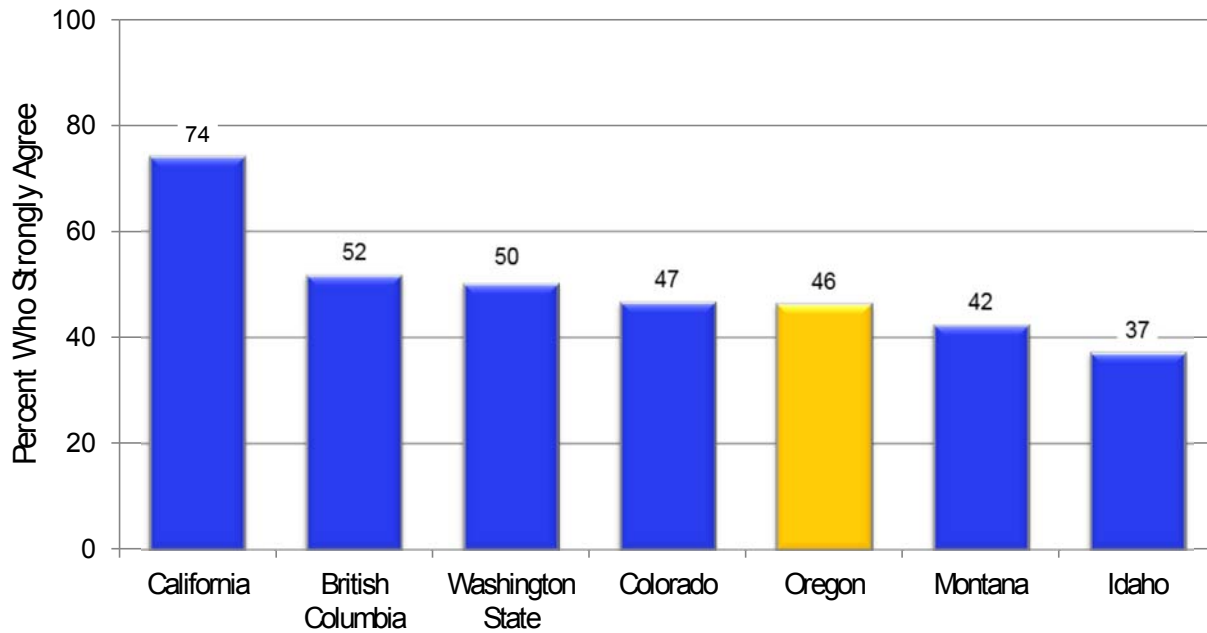
Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image vs. the Competition — Family Atmosphere



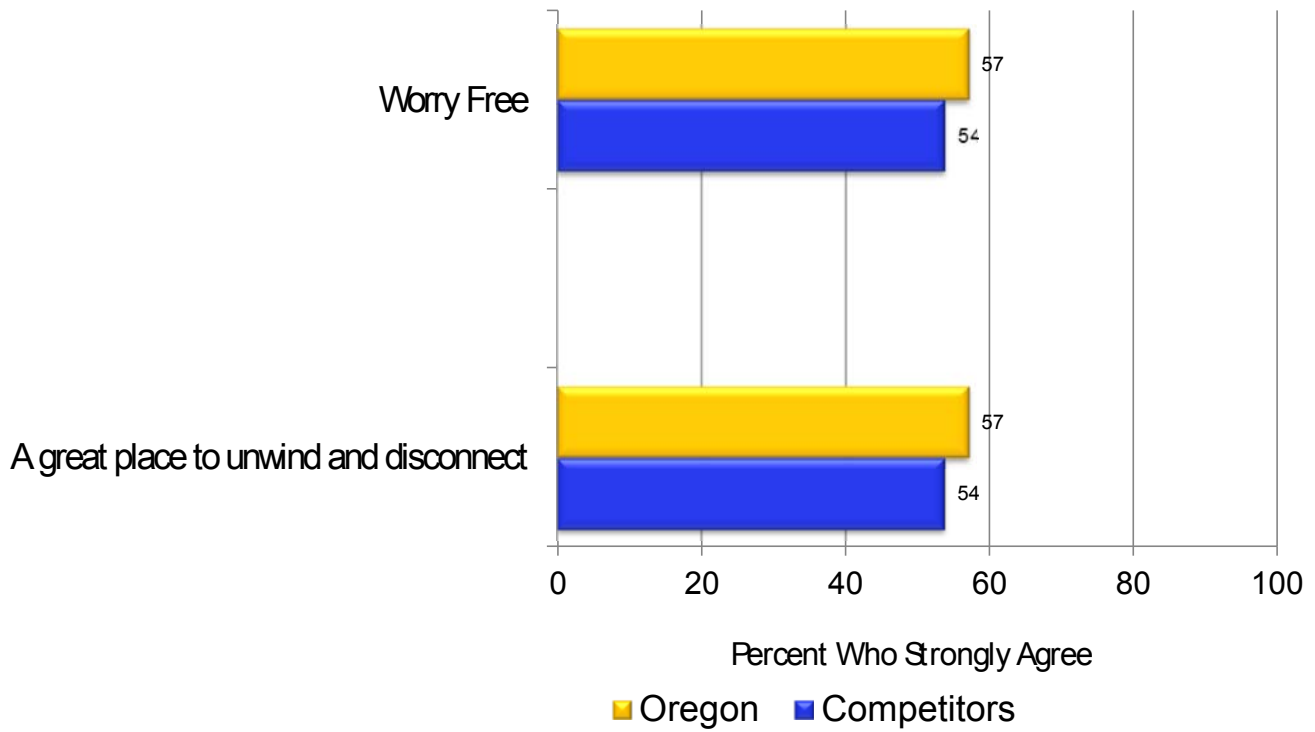
Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image vs. The Competition — Worry Free



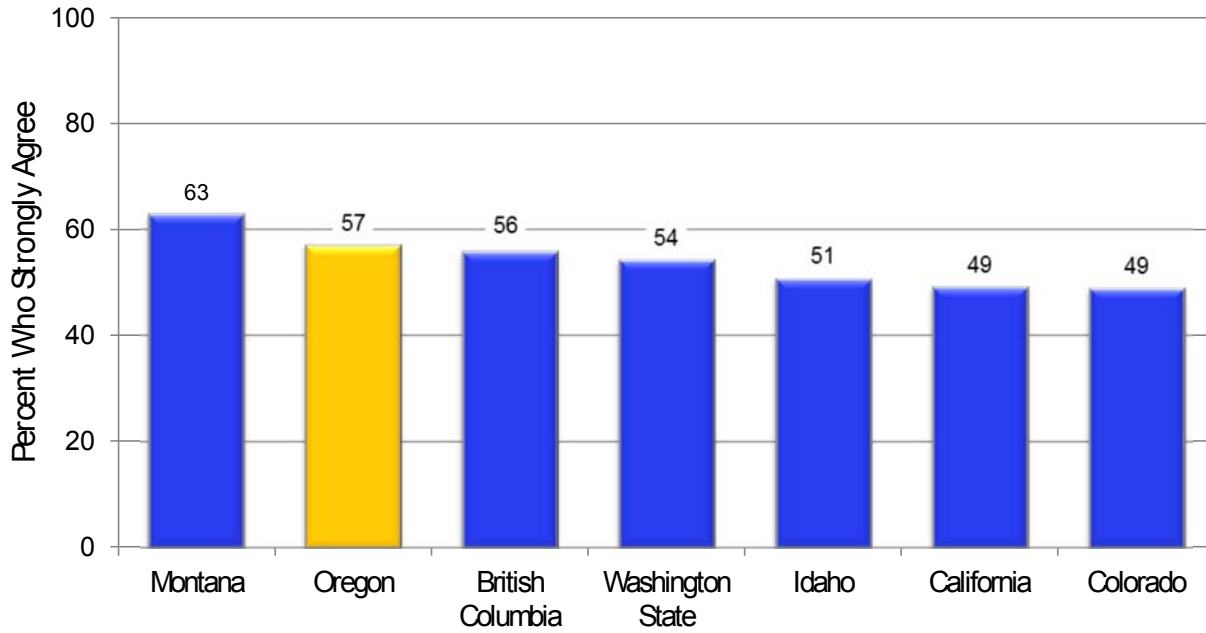
Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image vs. the Competition — Worry Free



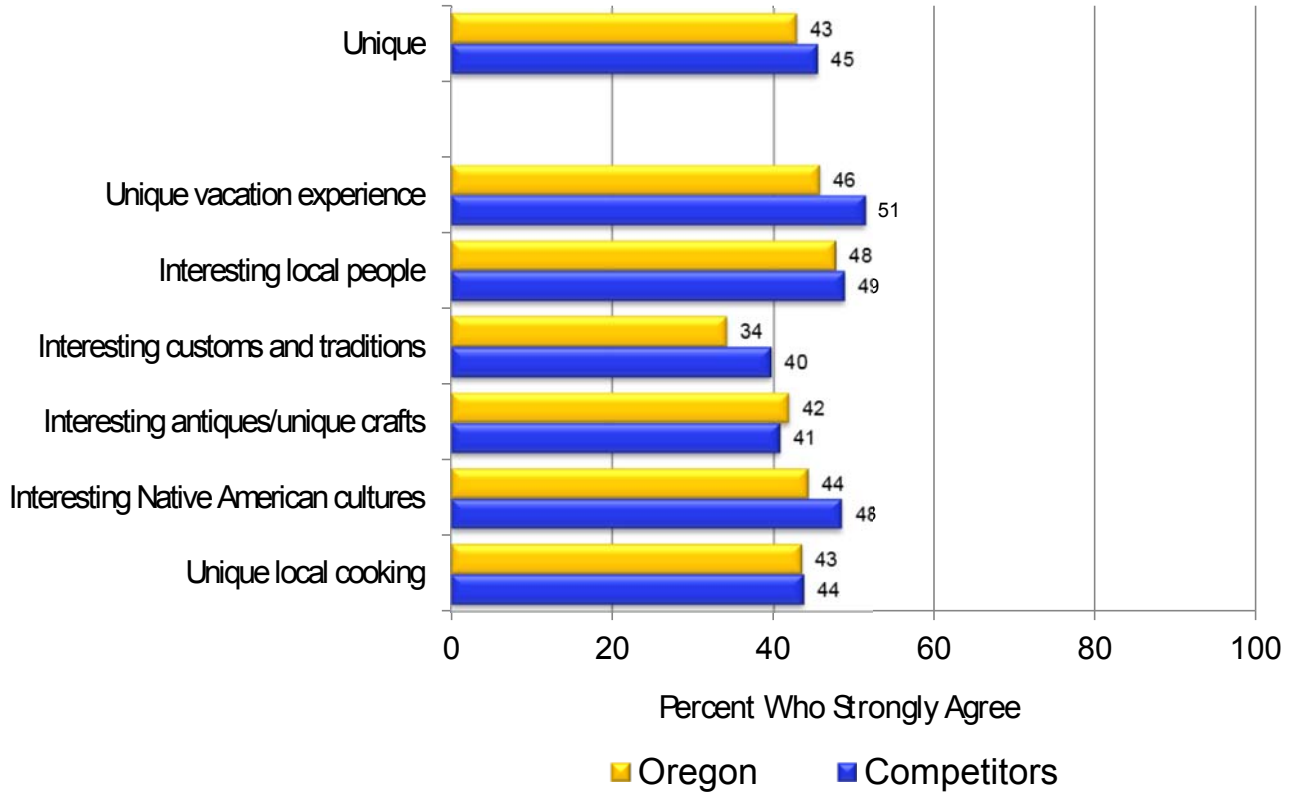
Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image vs. The Competition — Unique



Base: Residents of Oregon's Regional Advertising Markets

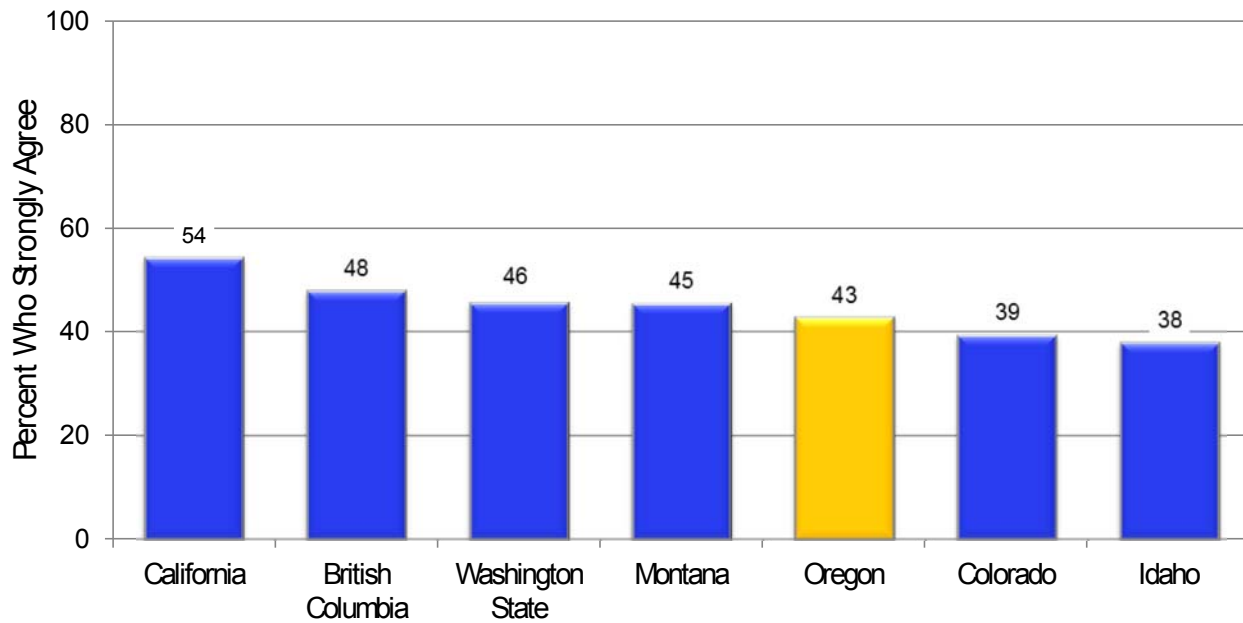




# Oregon's Image vs. the Competition — Unique



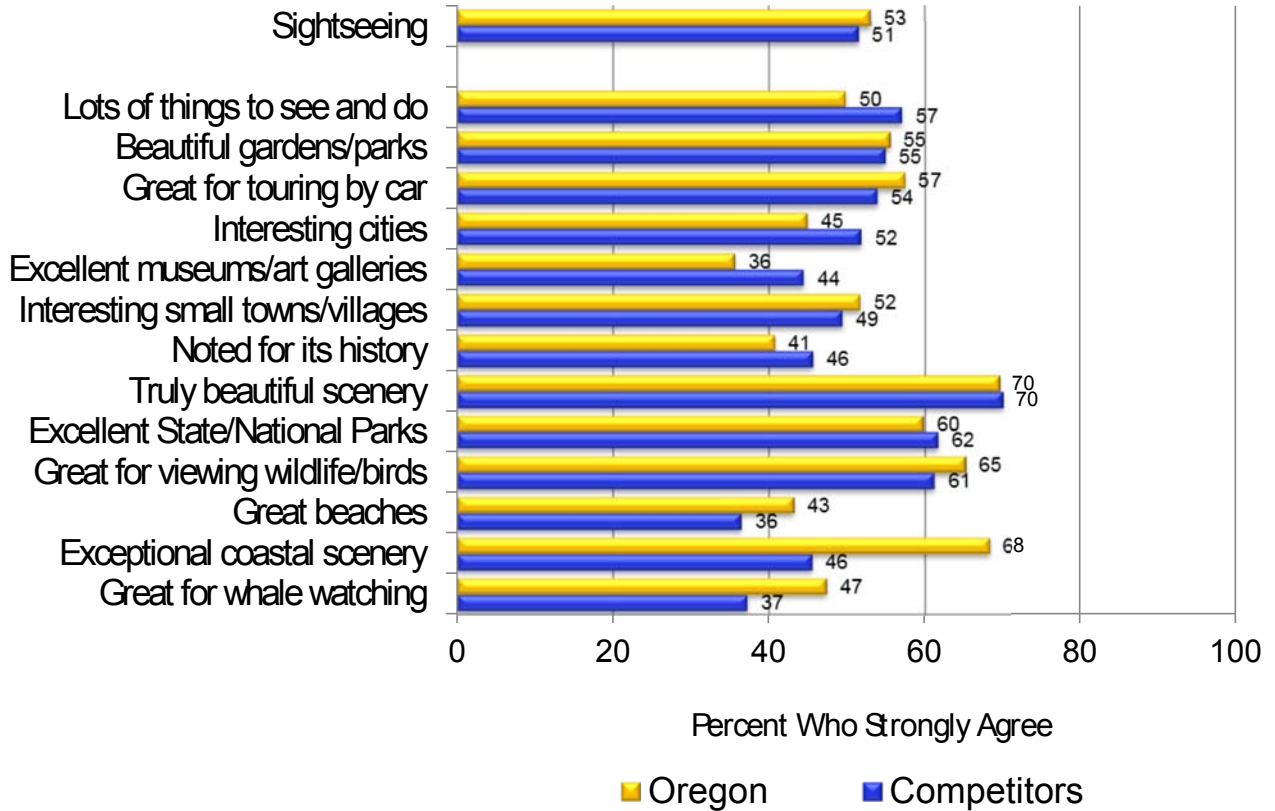
Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image vs. The Competition — Sightseeing



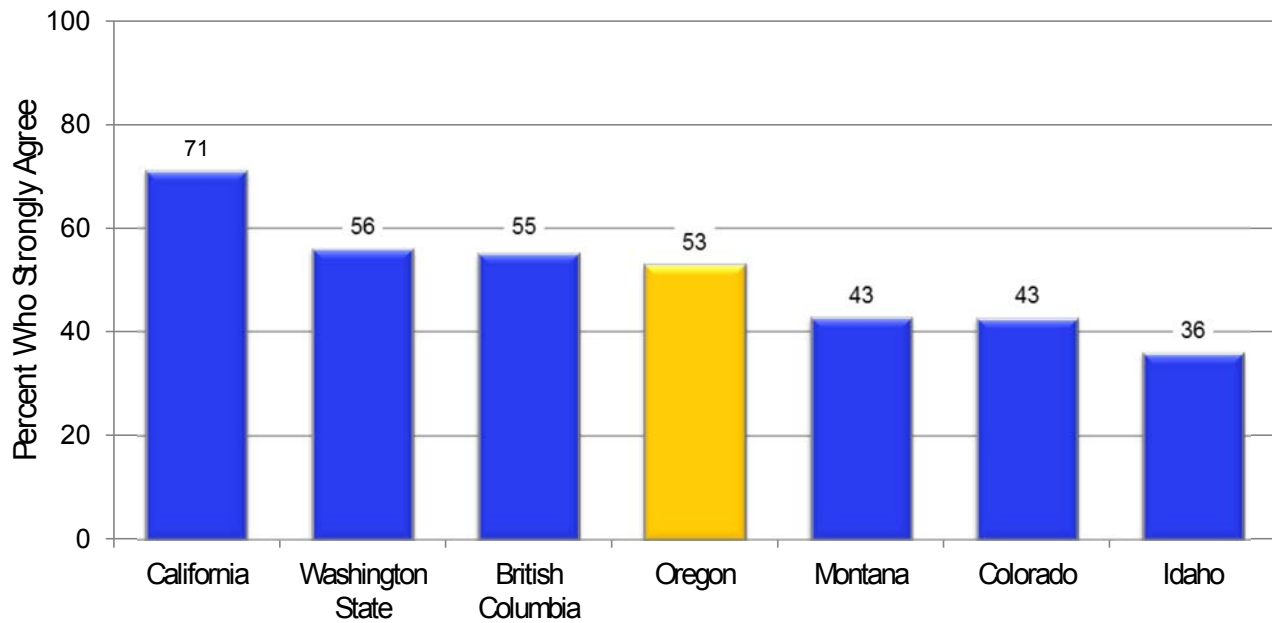
Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image vs. the Competition — Sightseeing



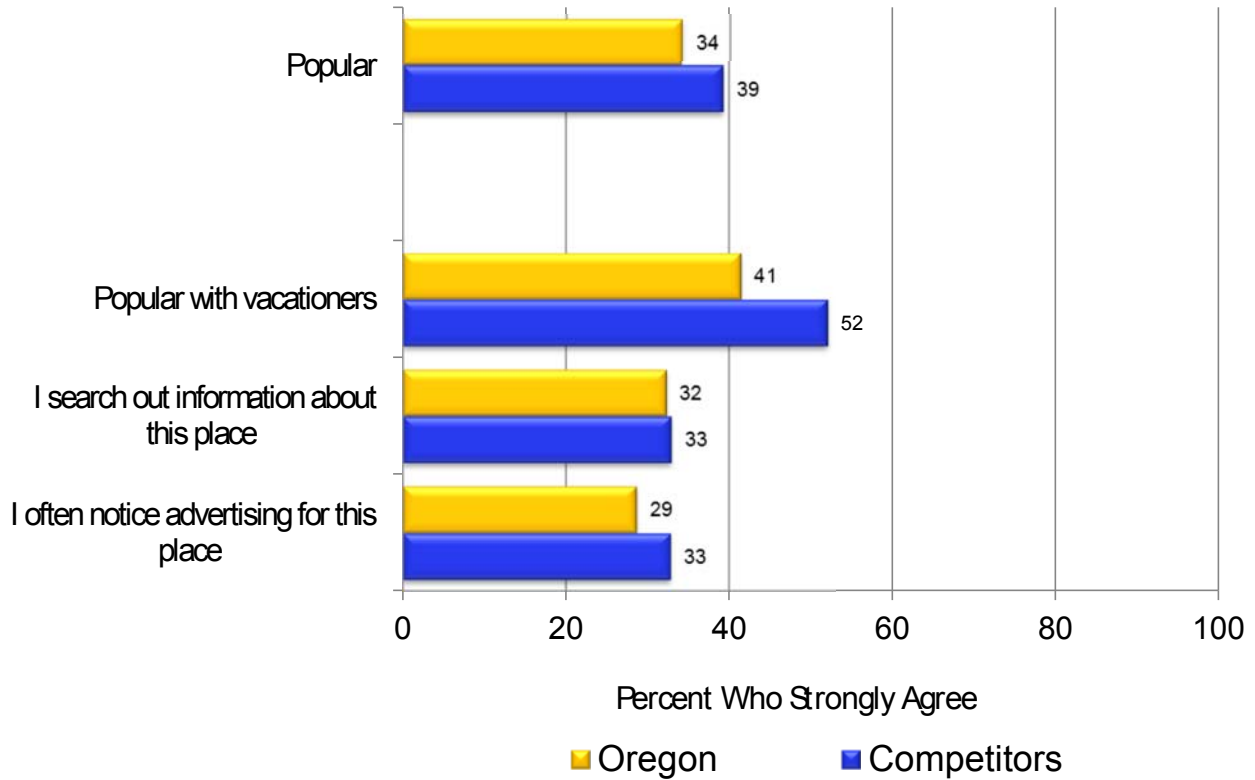
Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image vs. The Competition — Popular



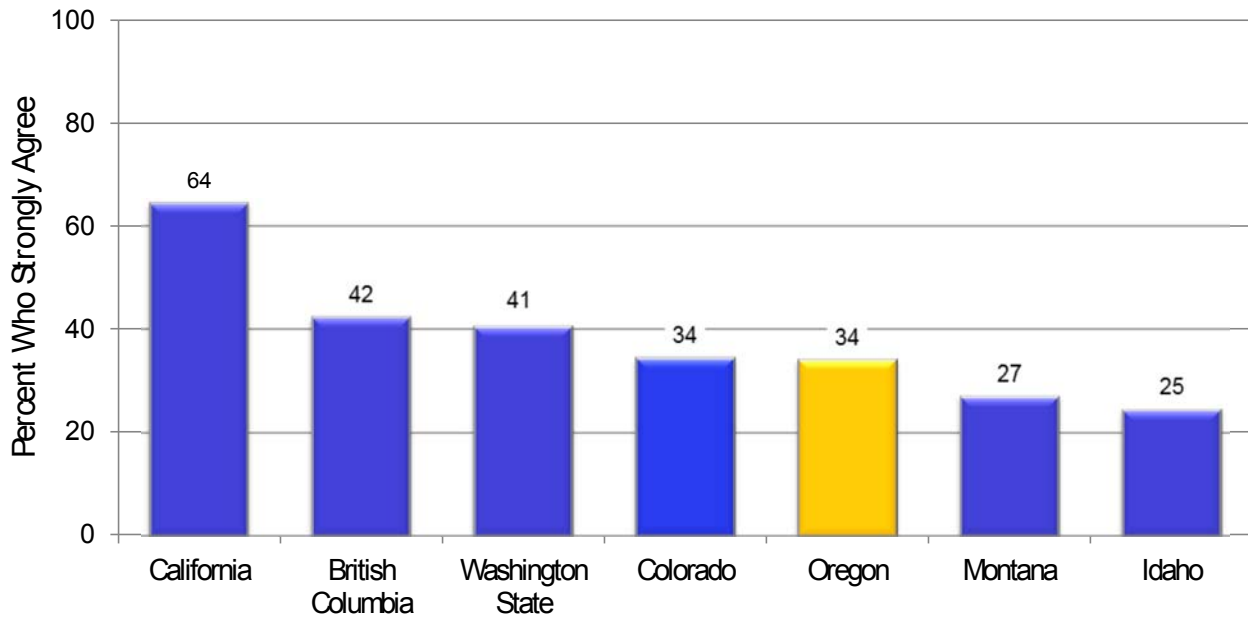
Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image vs. the Competition — Popular



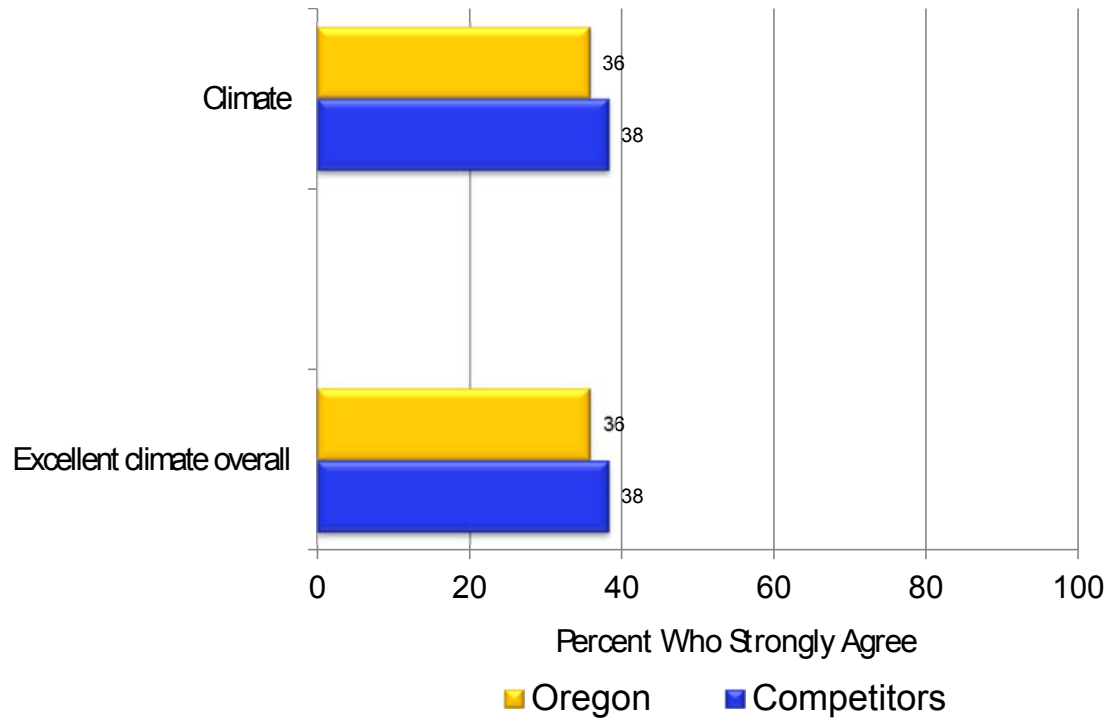
Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image vs. The Competition — Climate



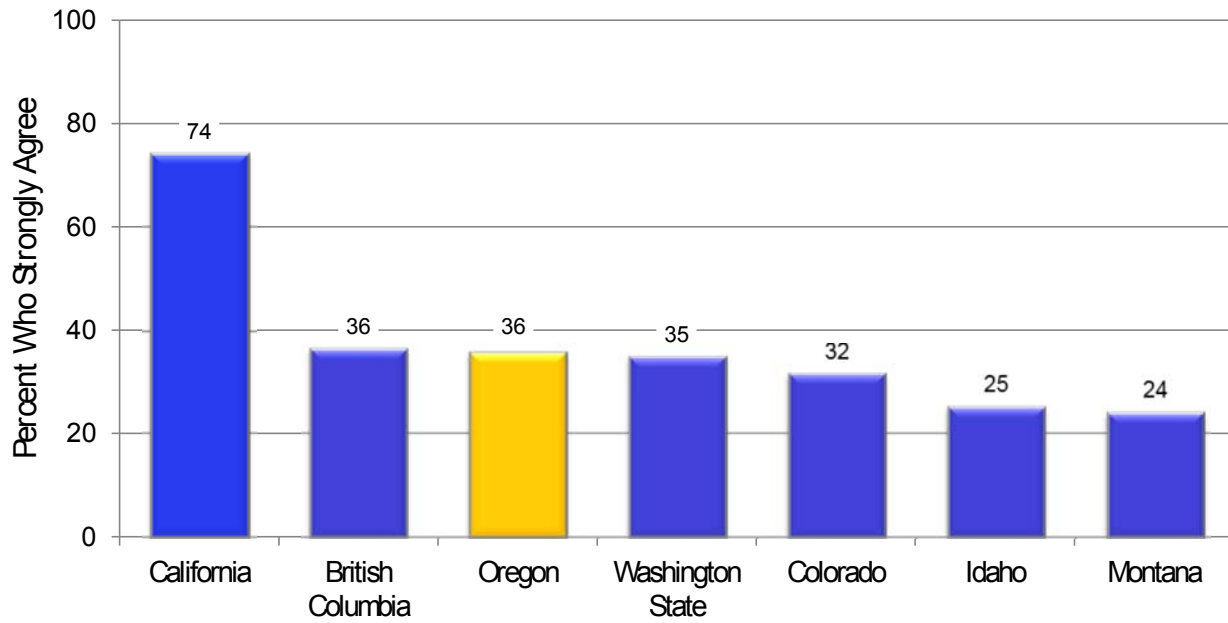
Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image vs. the Competition — Climate



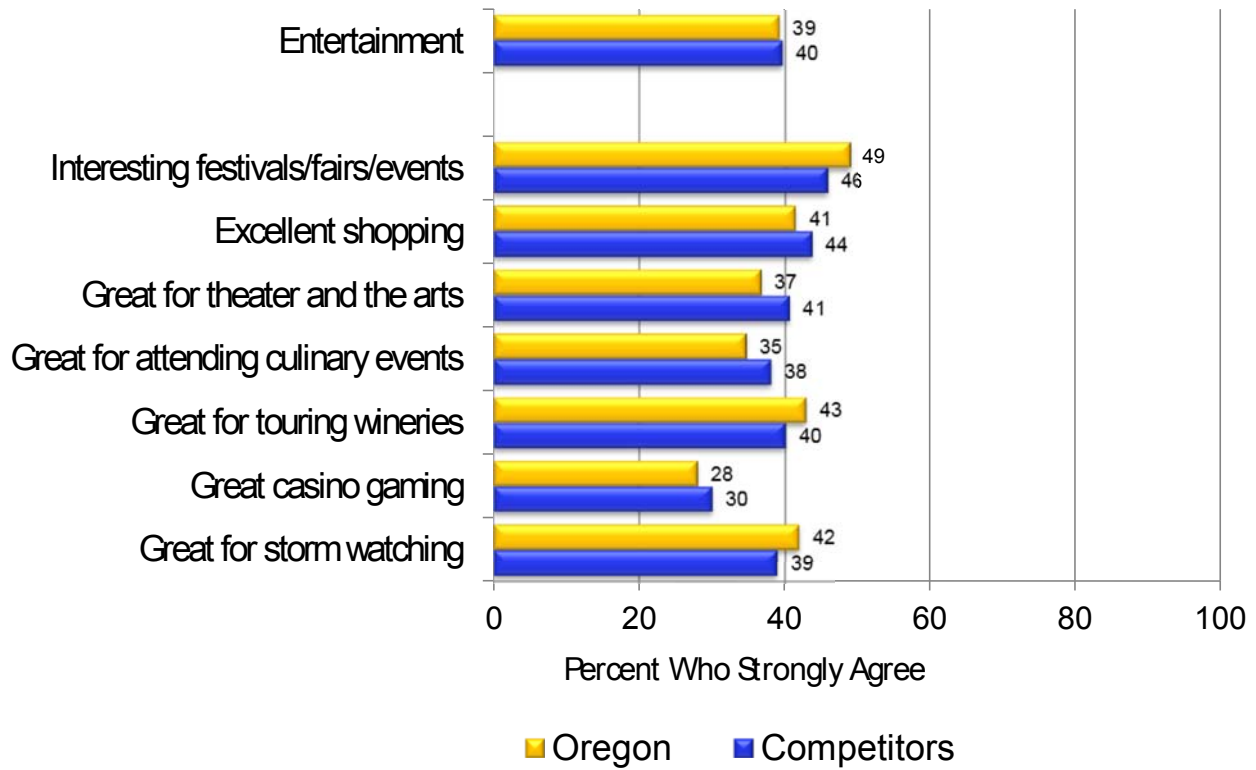
Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image vs. The Competition — Entertainment



Base: Residents of Oregon's Regional Advertising Markets

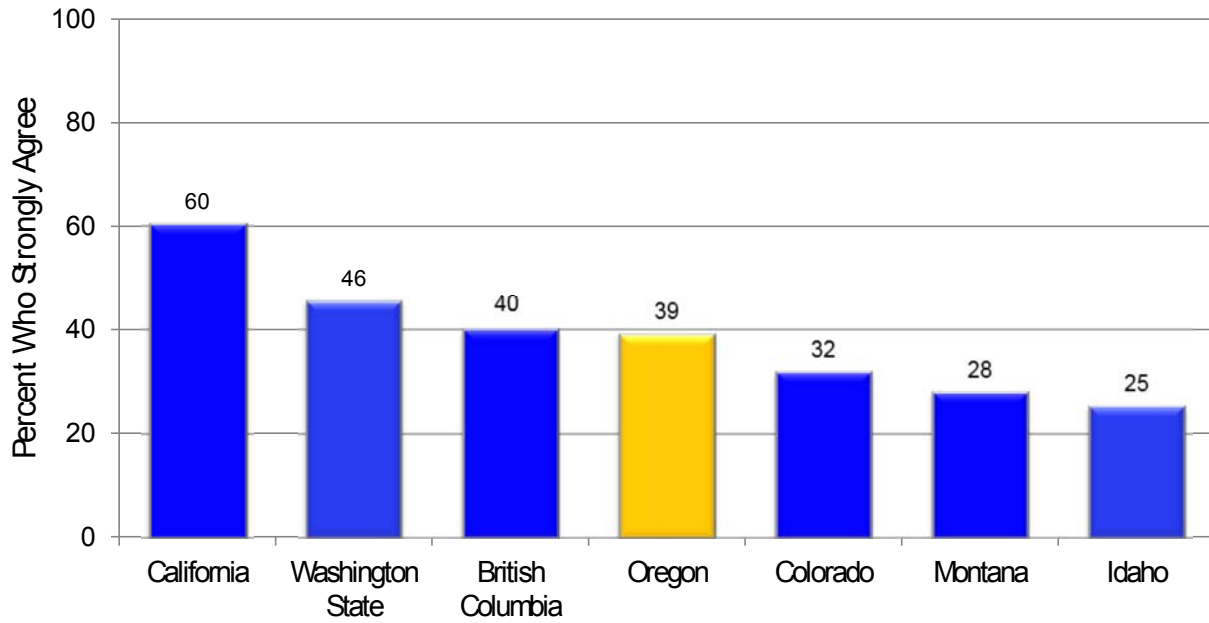




# Oregon's Image vs. the Competition — Entertainment



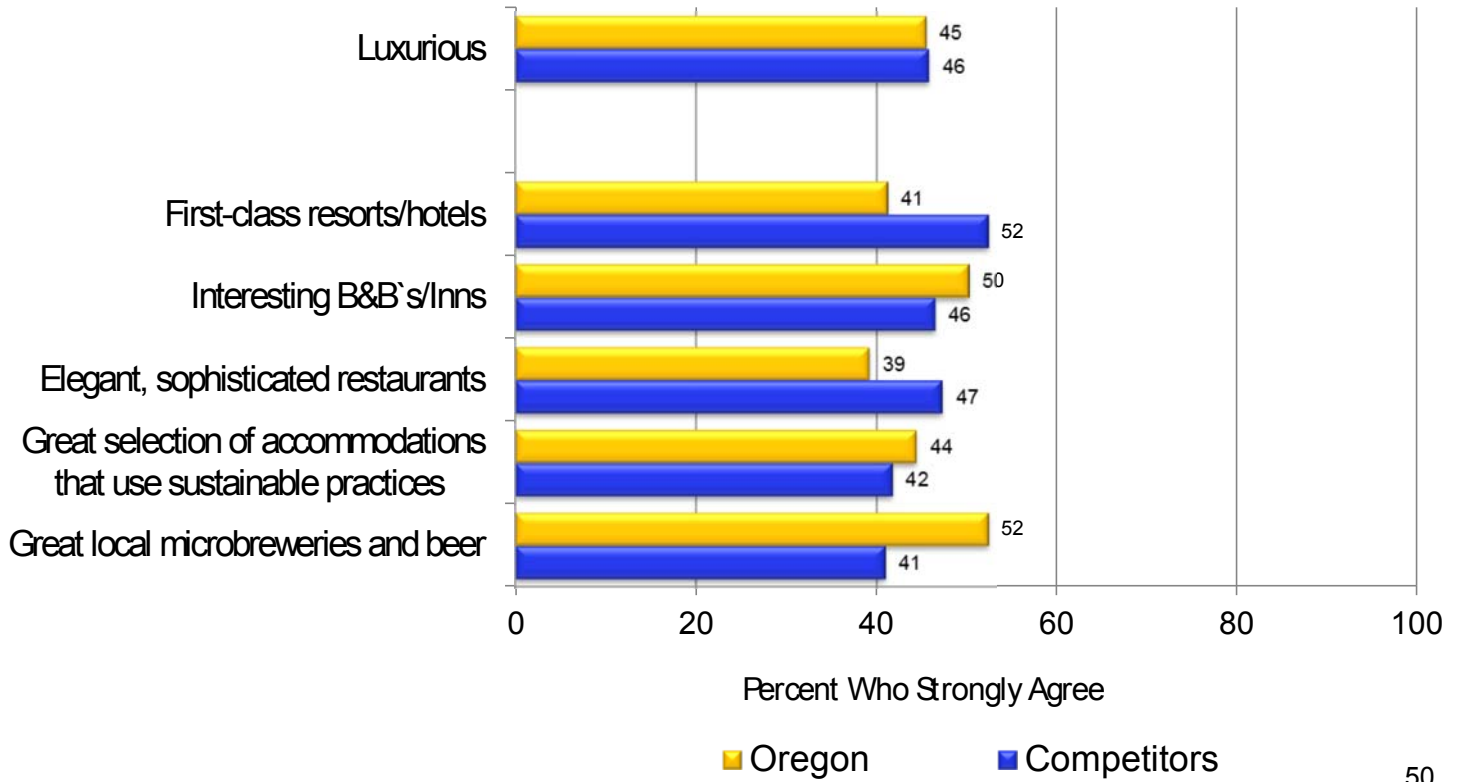
Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image vs. The Competition — Luxurious



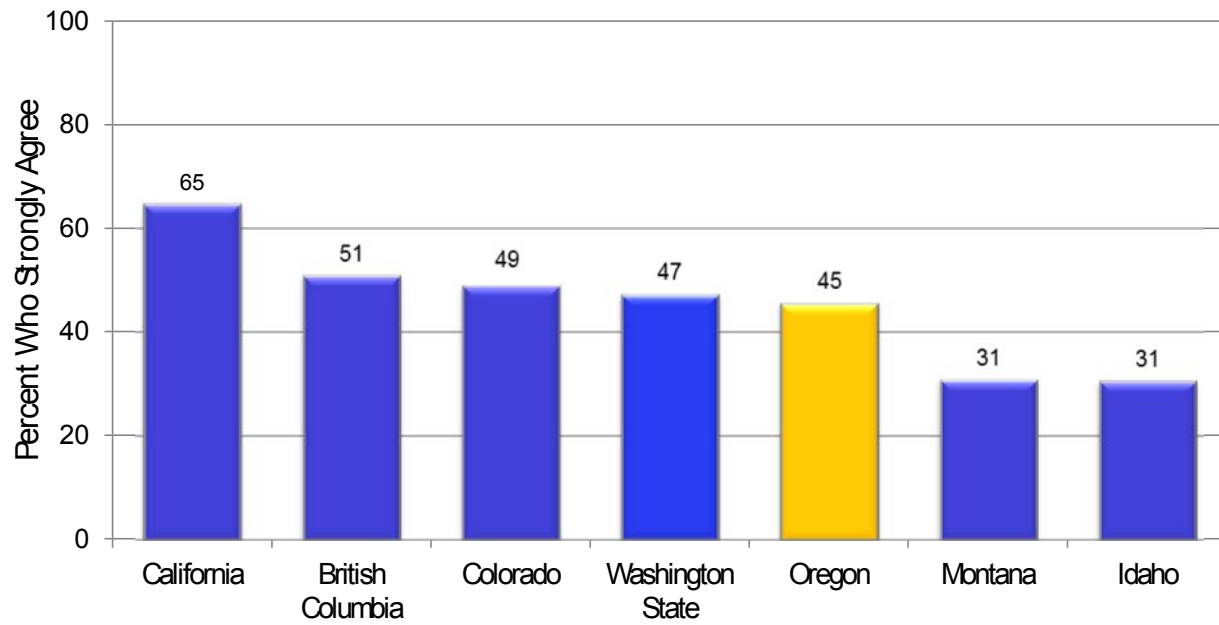
Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image vs. the Competition — Luxurious



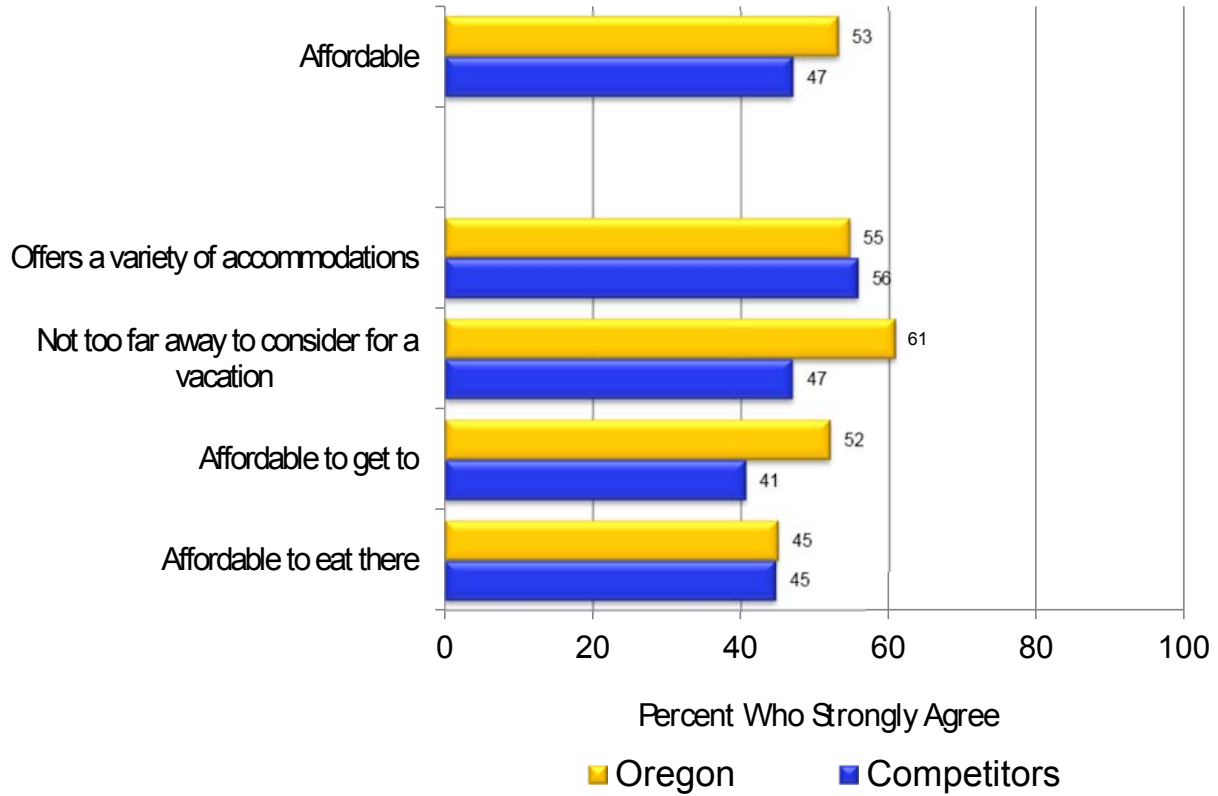
Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image vs. The Competition — Affordable



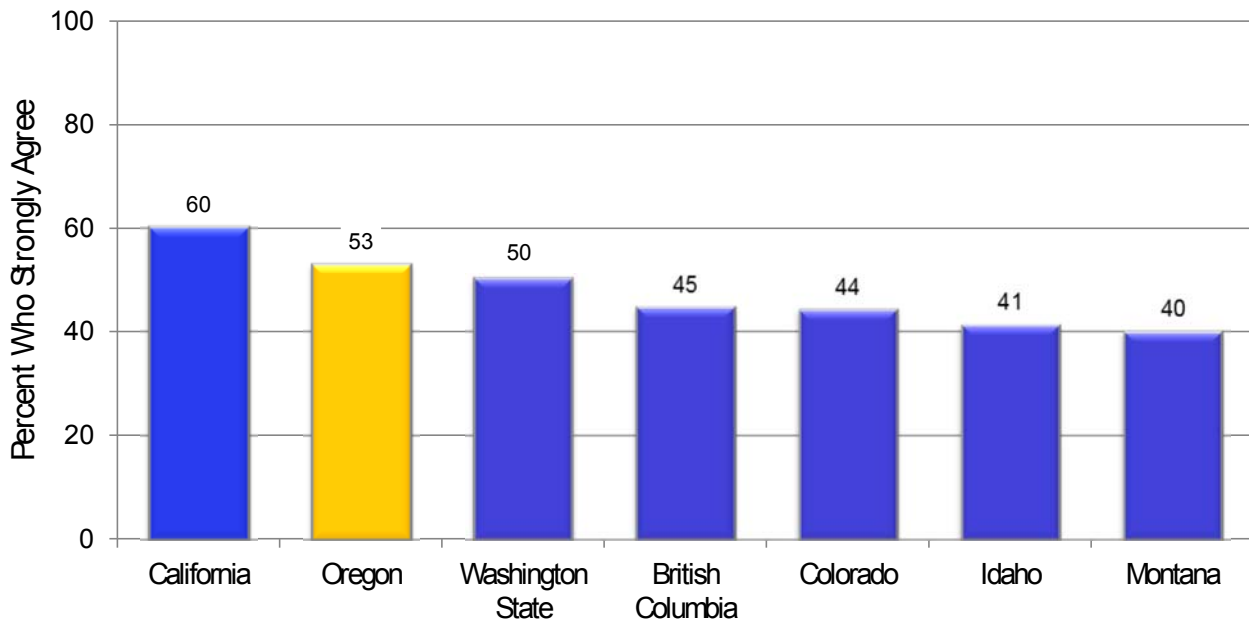
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# Oregon's Image vs. the Competition — Affordable



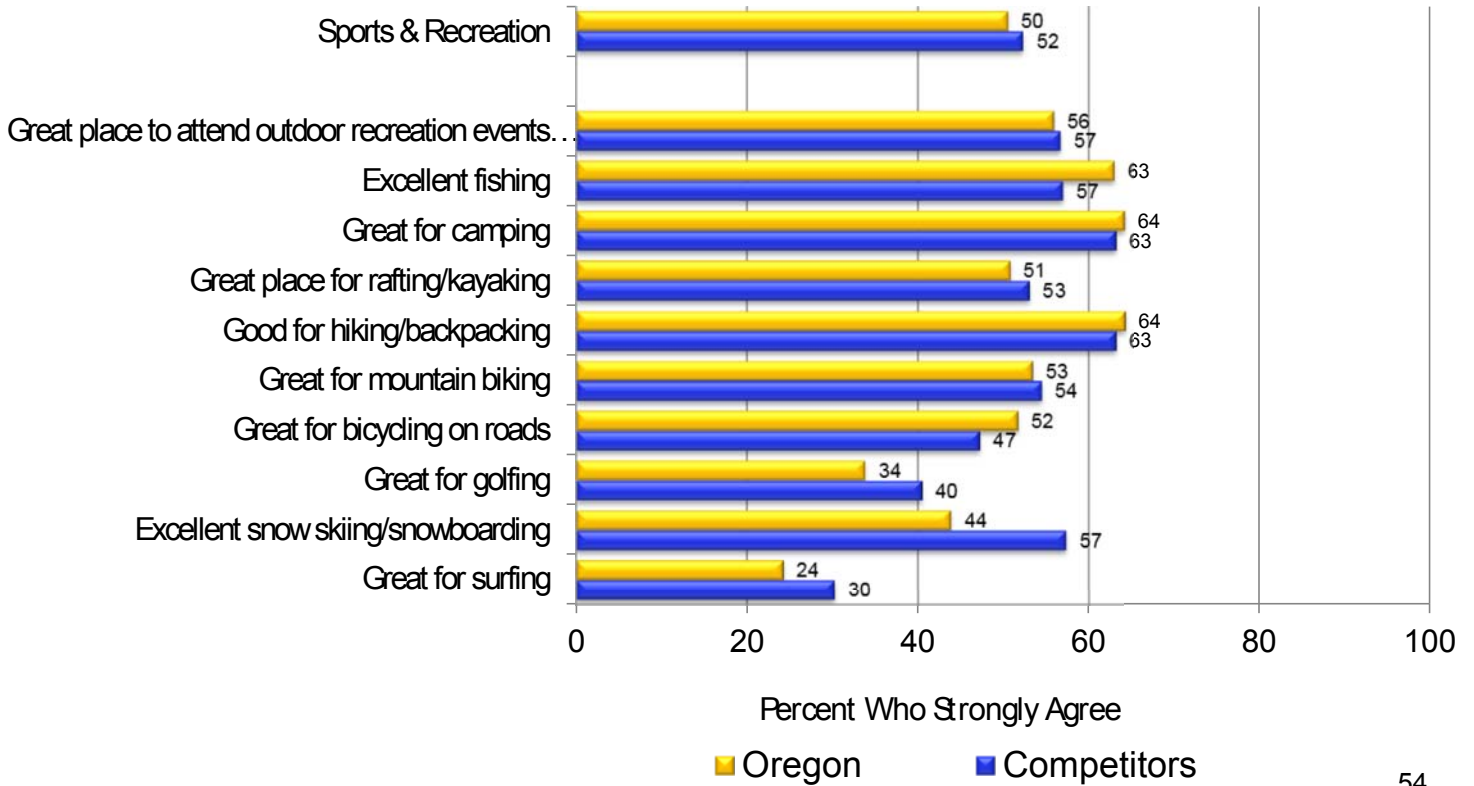
Base: Residents of Oregon's Regional Advertising Markets



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



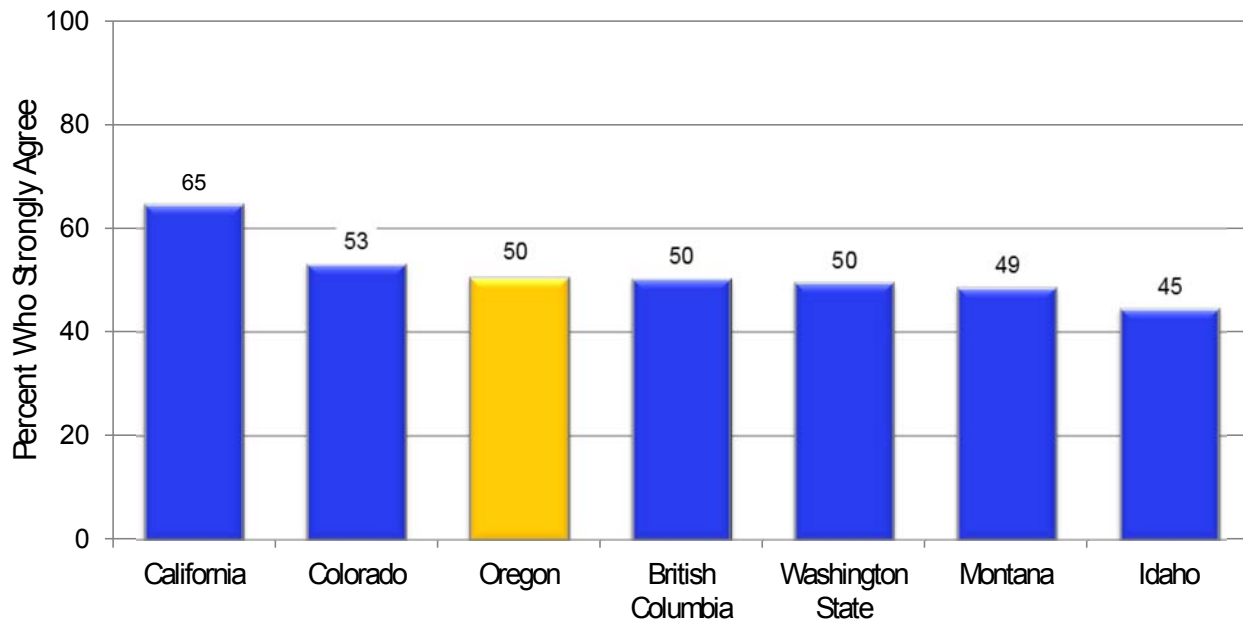
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# Oregon's Image vs. the Competition — Sports & Recreation



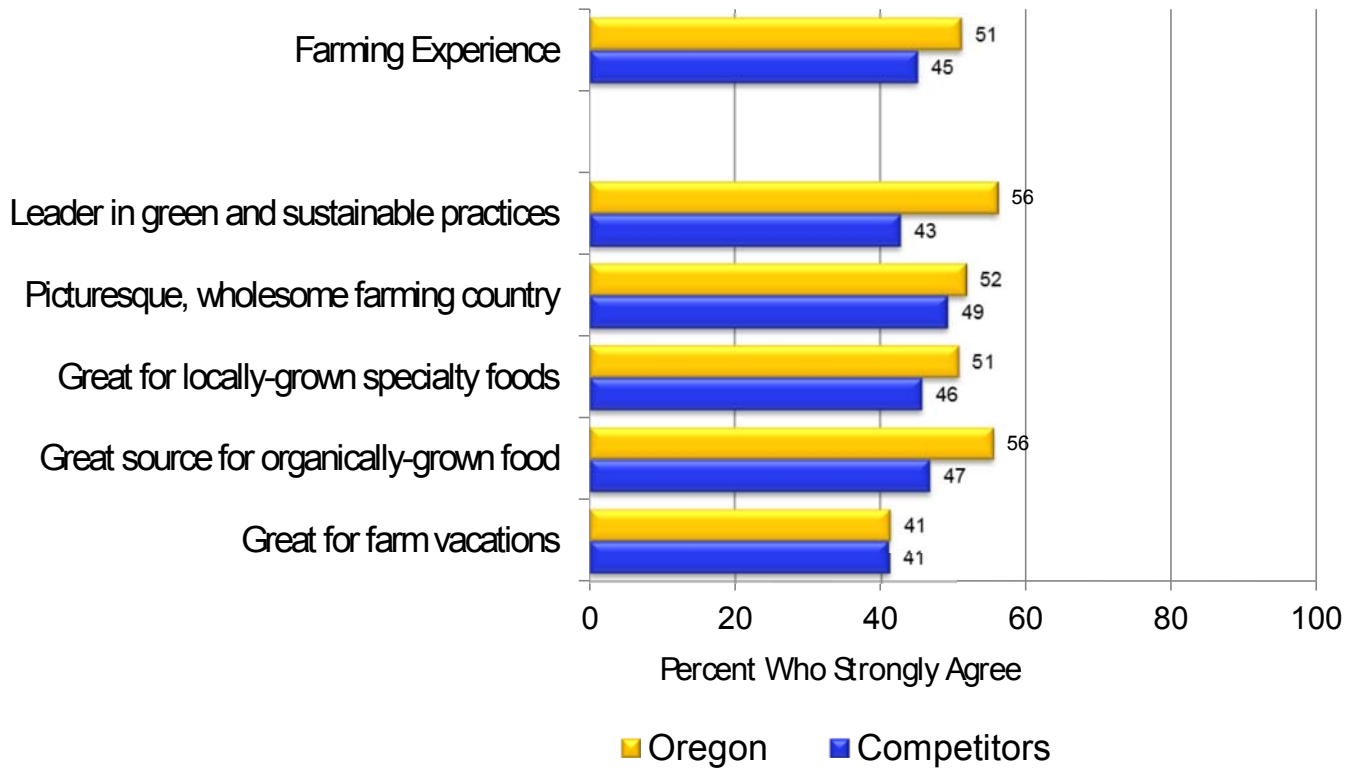
Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image vs. The Competition — Farming Experience



Base: Residents of Oregon's Regional Advertising Markets

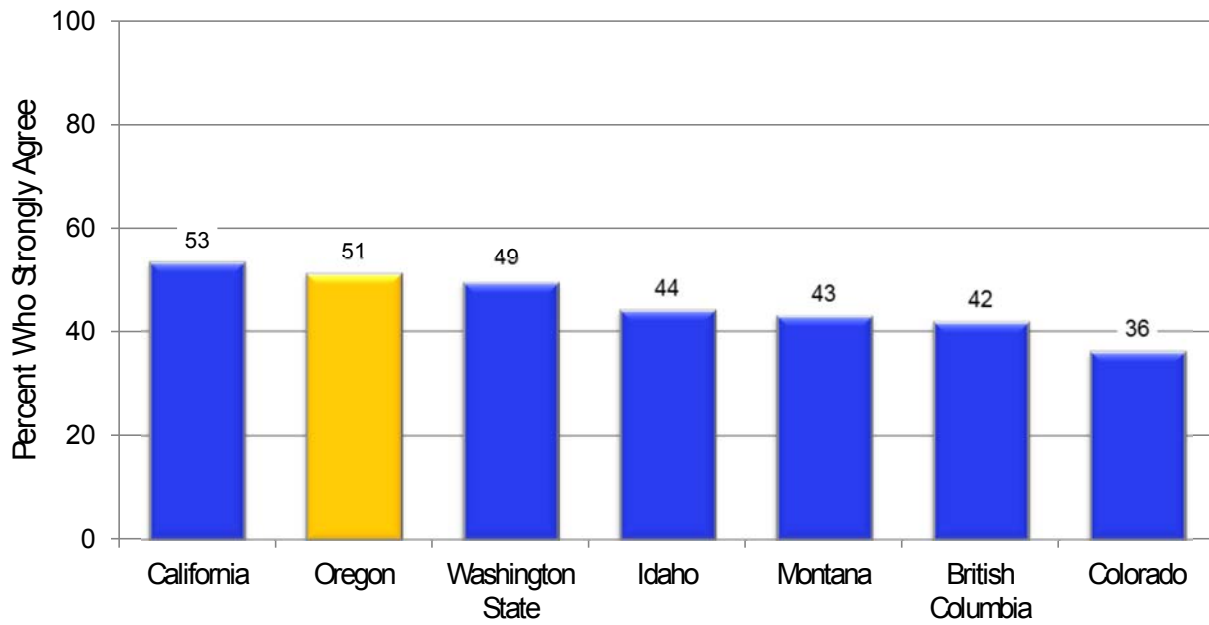




# Oregon's Image vs. the Competition — Farming Experience



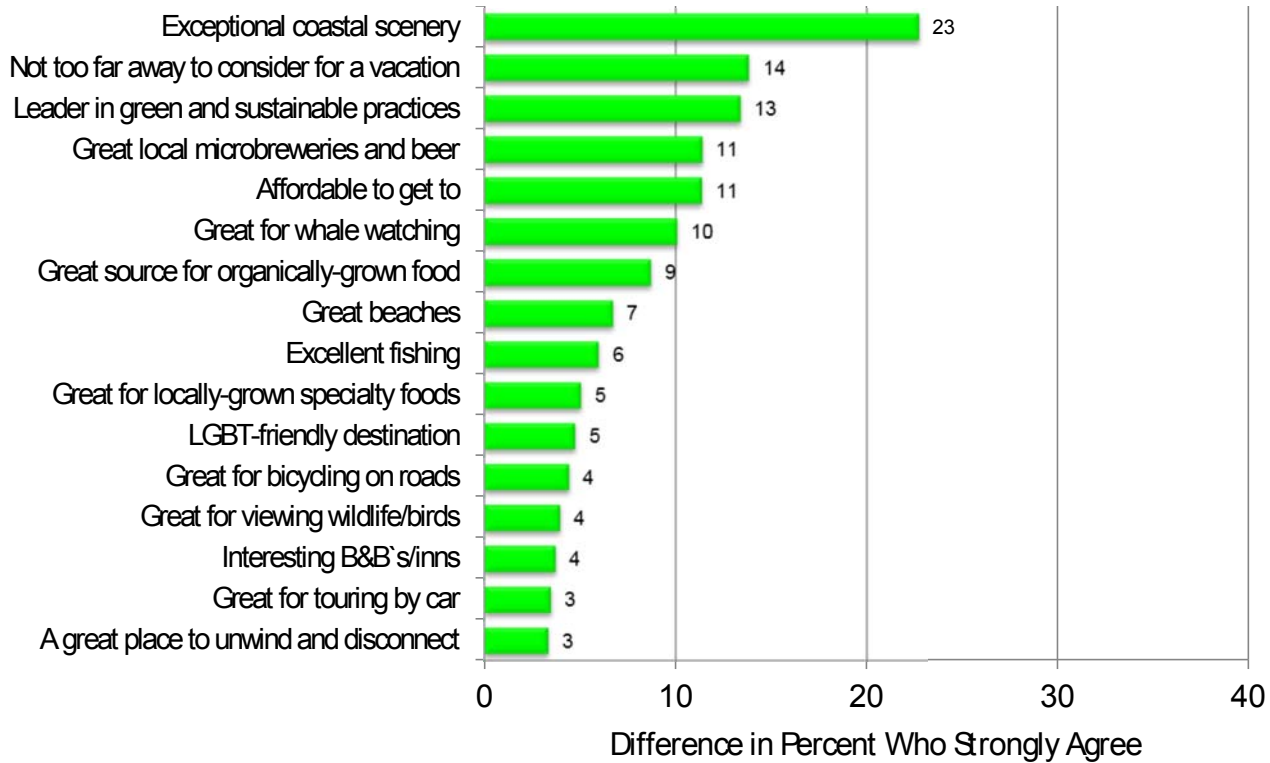
Base: Residents of Oregon's Regional Advertising Markets



# Oregon's Image Strengths vs. the Competition



Base: Residents of Oregon's Regional Advertising Markets

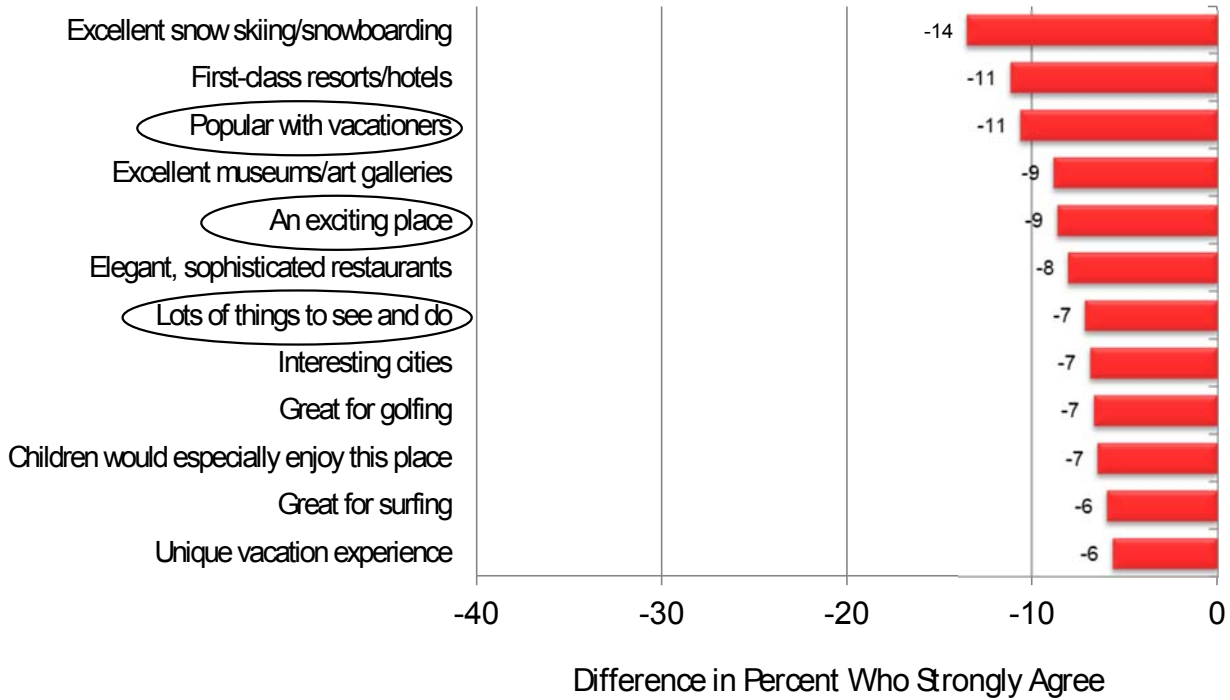


Circled attributes are image hot buttons

# Oregon's Image Weaknesses vs. the Competition



Base: Residents of Oregon's Regional Advertising Markets

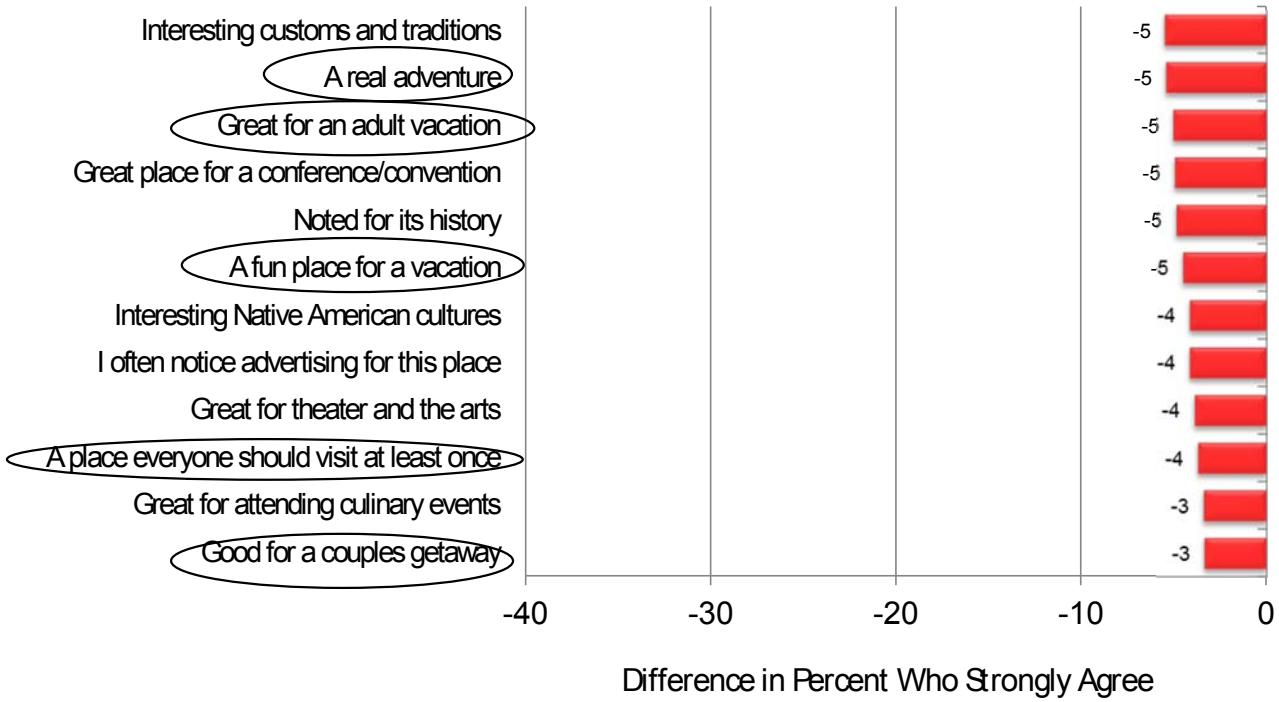


Circled attributes are image hot buttons

# Oregon's Image Weaknesses vs. the Competition



Base: Residents of Oregon's Regional Advertising Markets

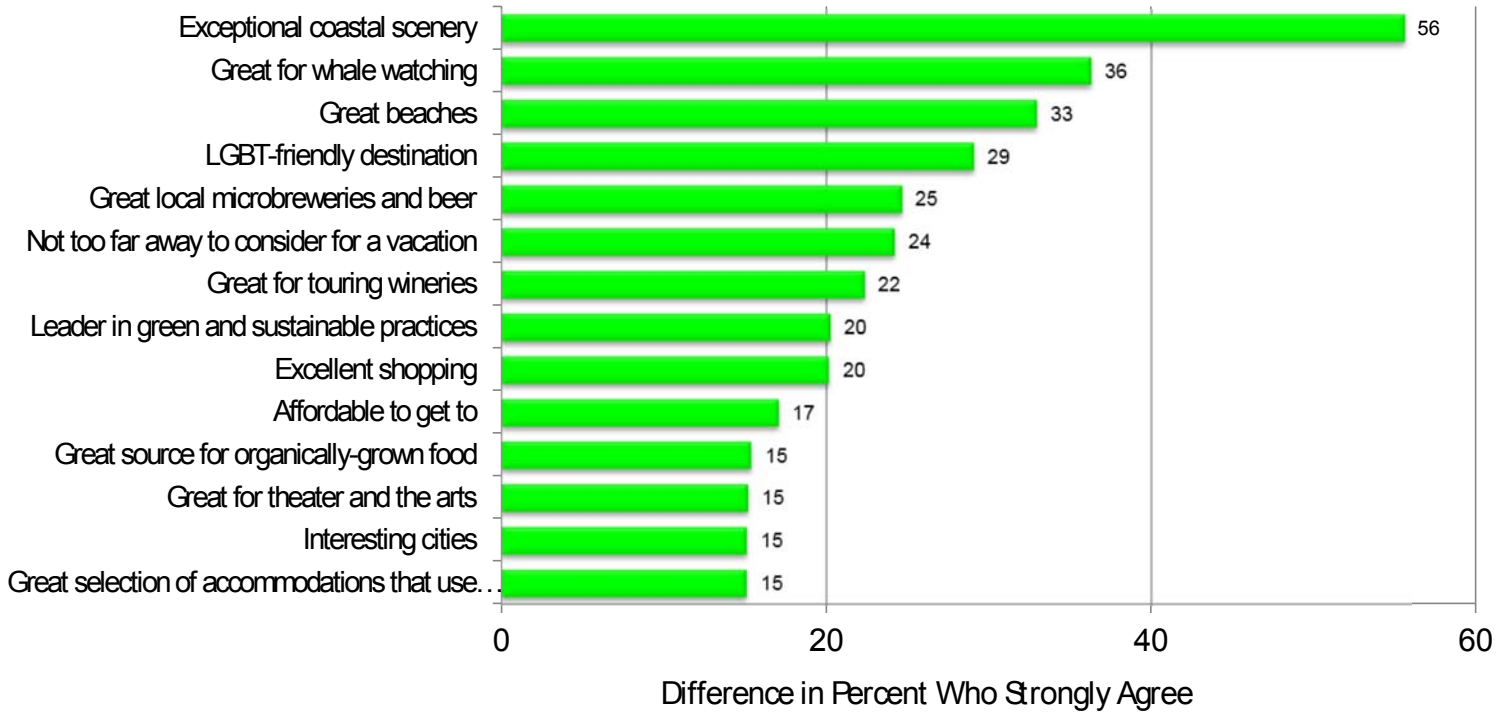


Circled attributes are image hot buttons

# Oregon's Image Strengths vs. Idaho



Base: Regional Market

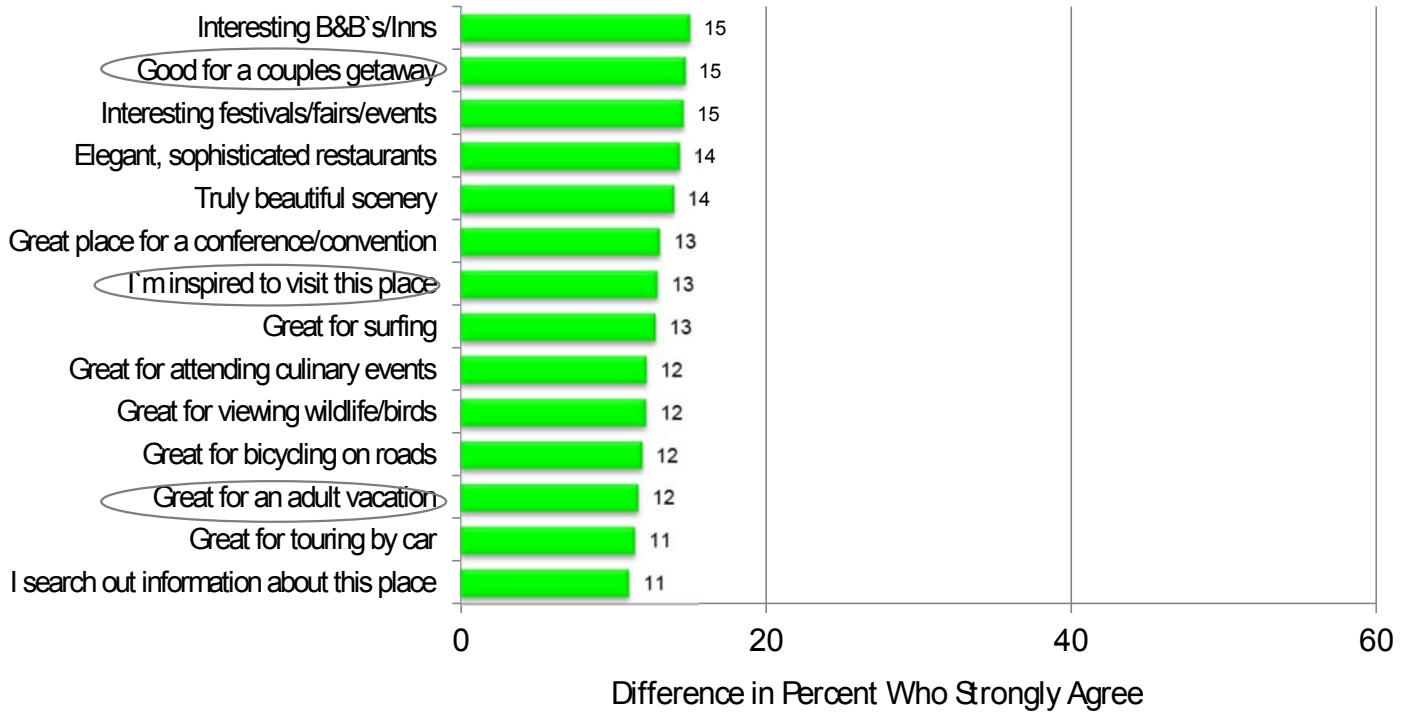


Circled attributes are image hot buttons

# Oregon's Image Strengths vs. Idaho



Base: Regional Market

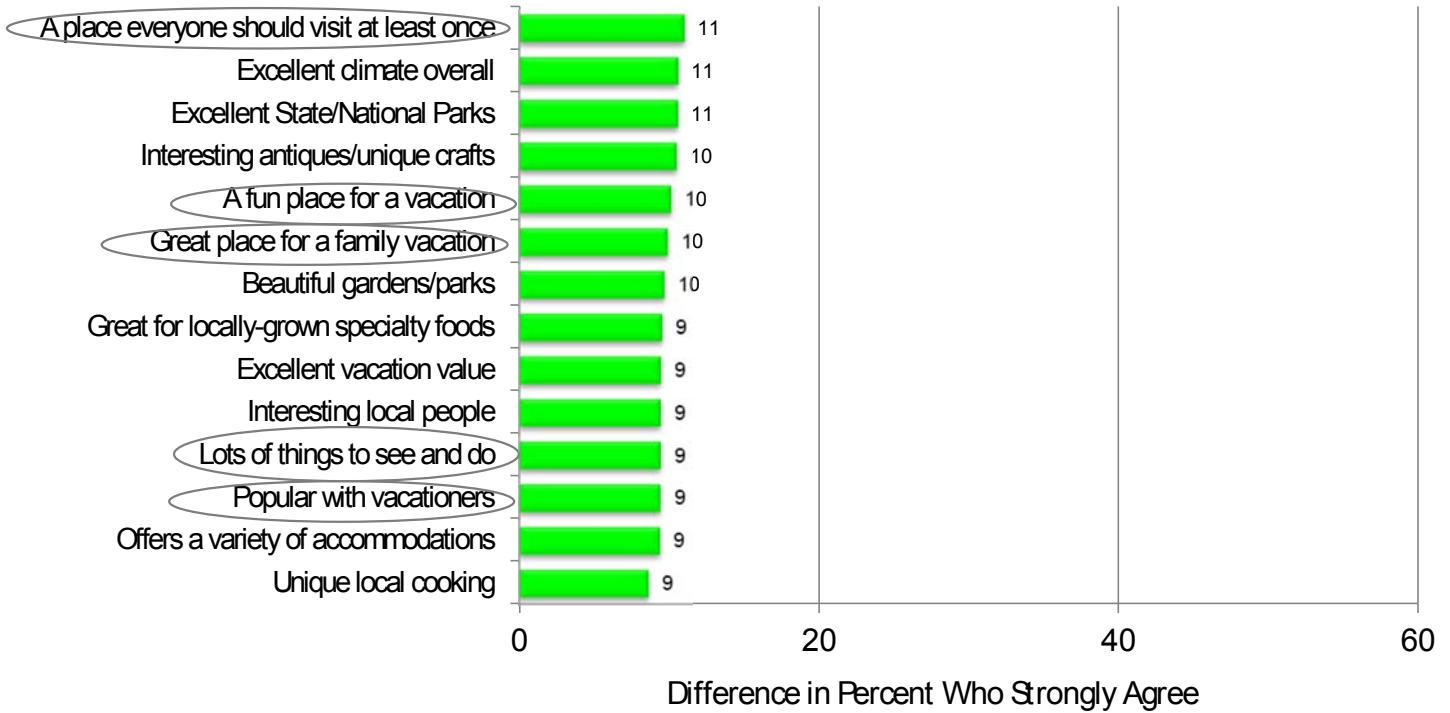


Circled attributes are image hot buttons

# Oregon's Image Strengths vs. Idaho



Base: Regional Market

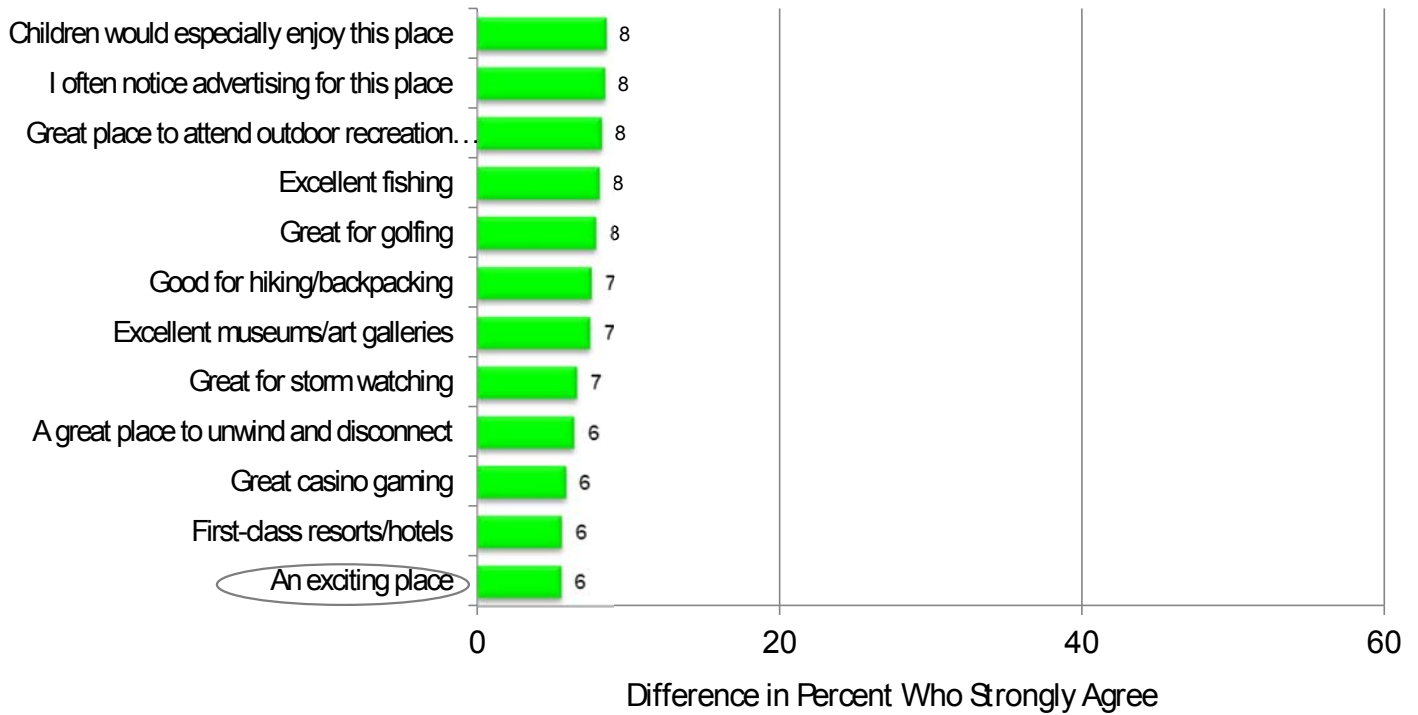


Circled attributes are image hot buttons

# Oregon's Image Strengths vs. Idaho



Base: Regional Market



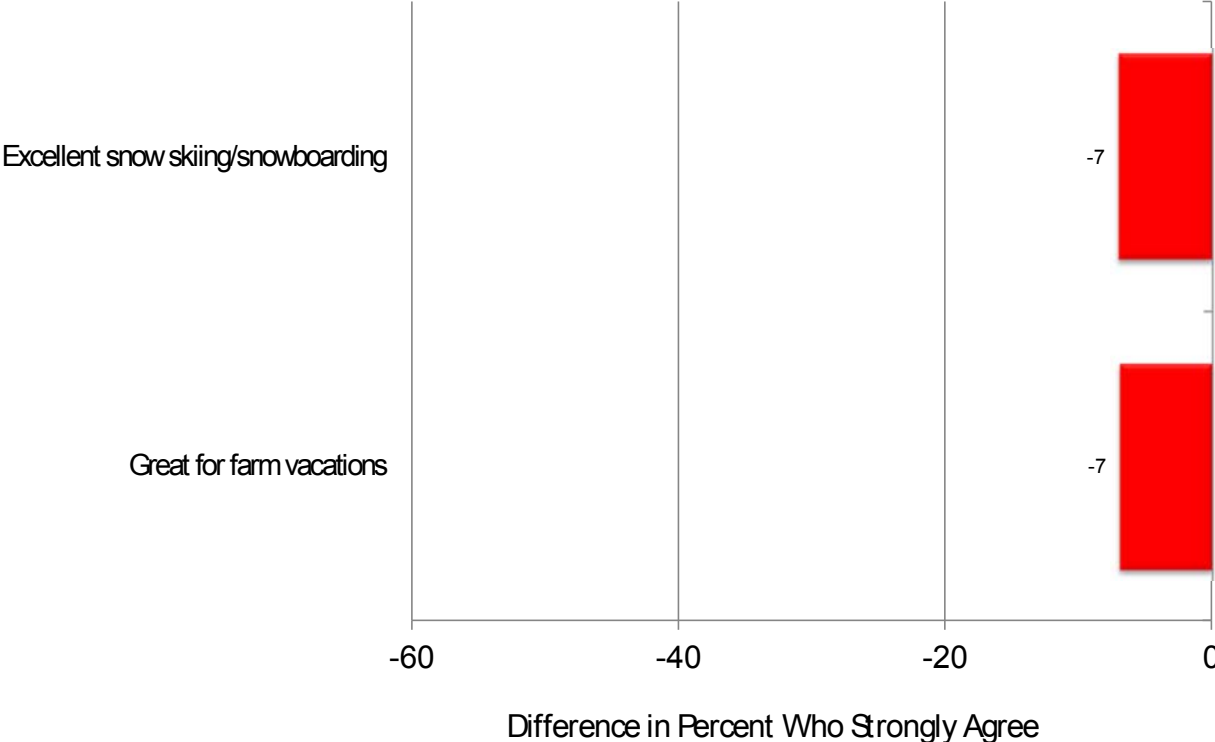
Circled attributes are image hot buttons



# Oregon's Image Weaknesses vs. Idaho



Base: Regional Market

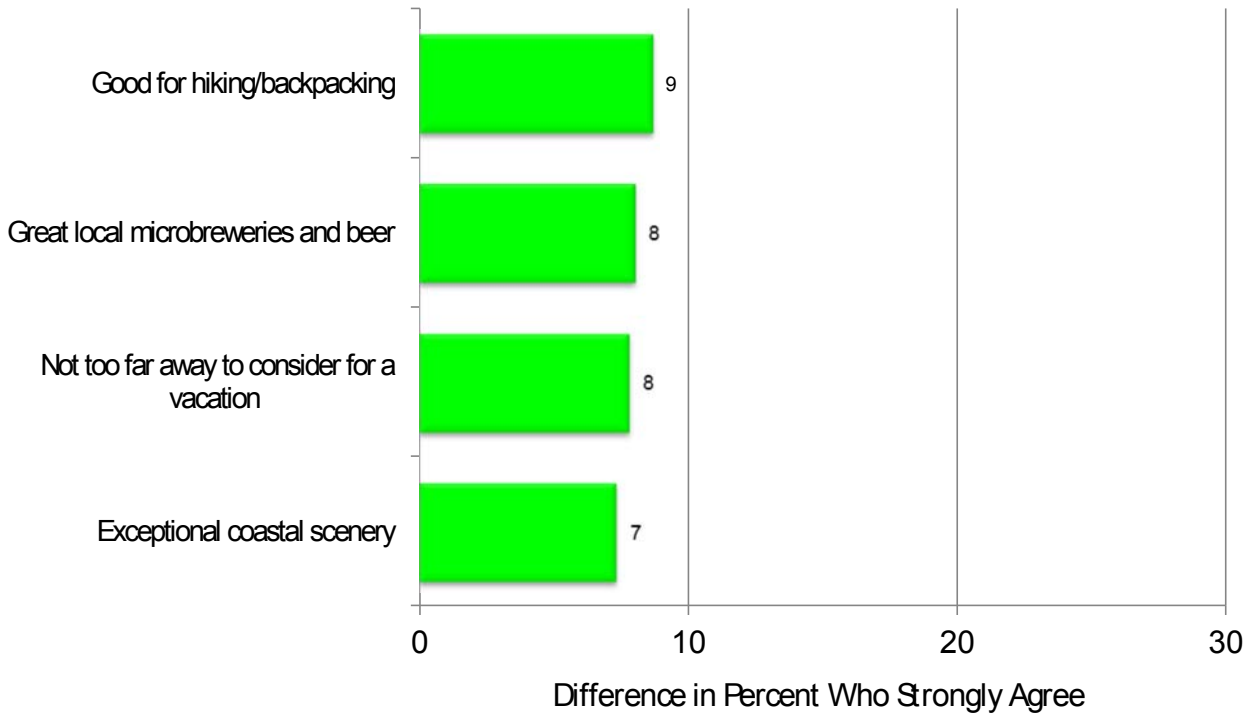


Circled attributes are image hot buttons

# Oregon's Image Strengths vs. Washington State



Base: Regional Market

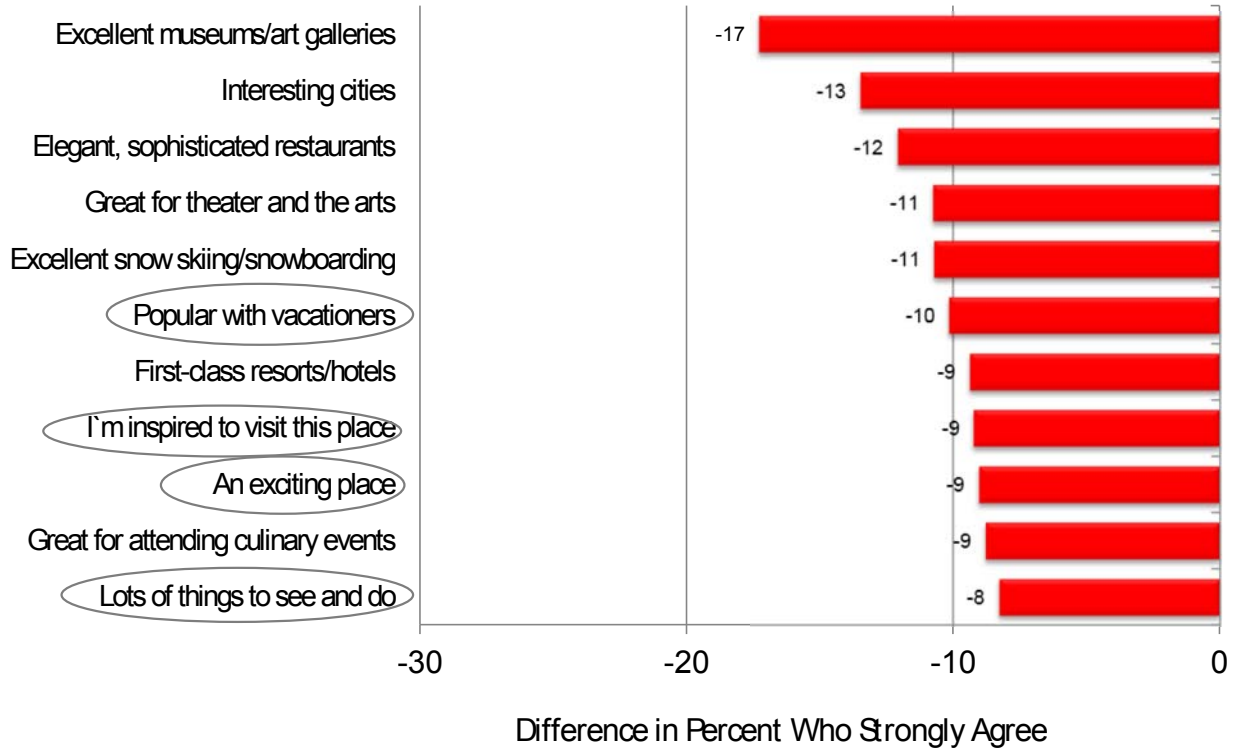


Circled attributes are image hot buttons

# Oregon's Image Weaknesses vs. Washington State



Base: Regional Market

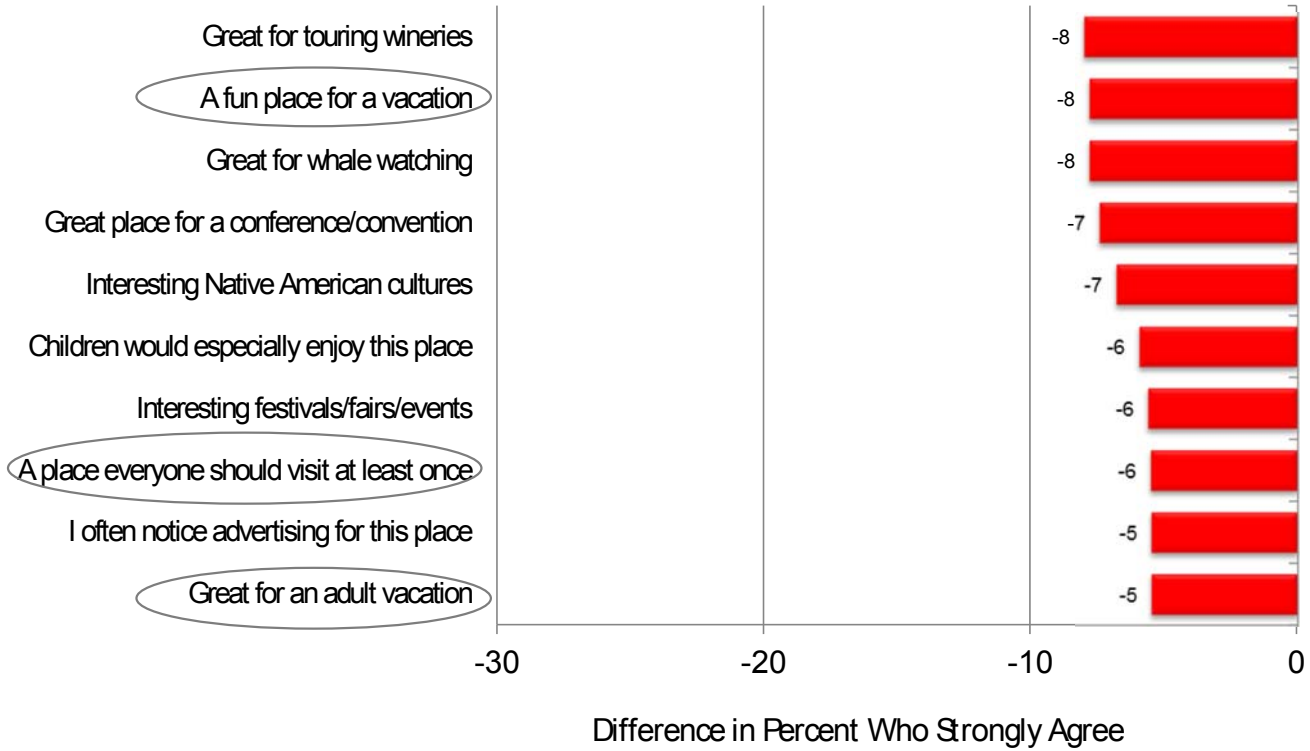


Circled attributes are image hot buttons

# Oregon's Image Weaknesses vs. Washington State



Base: Regional Market

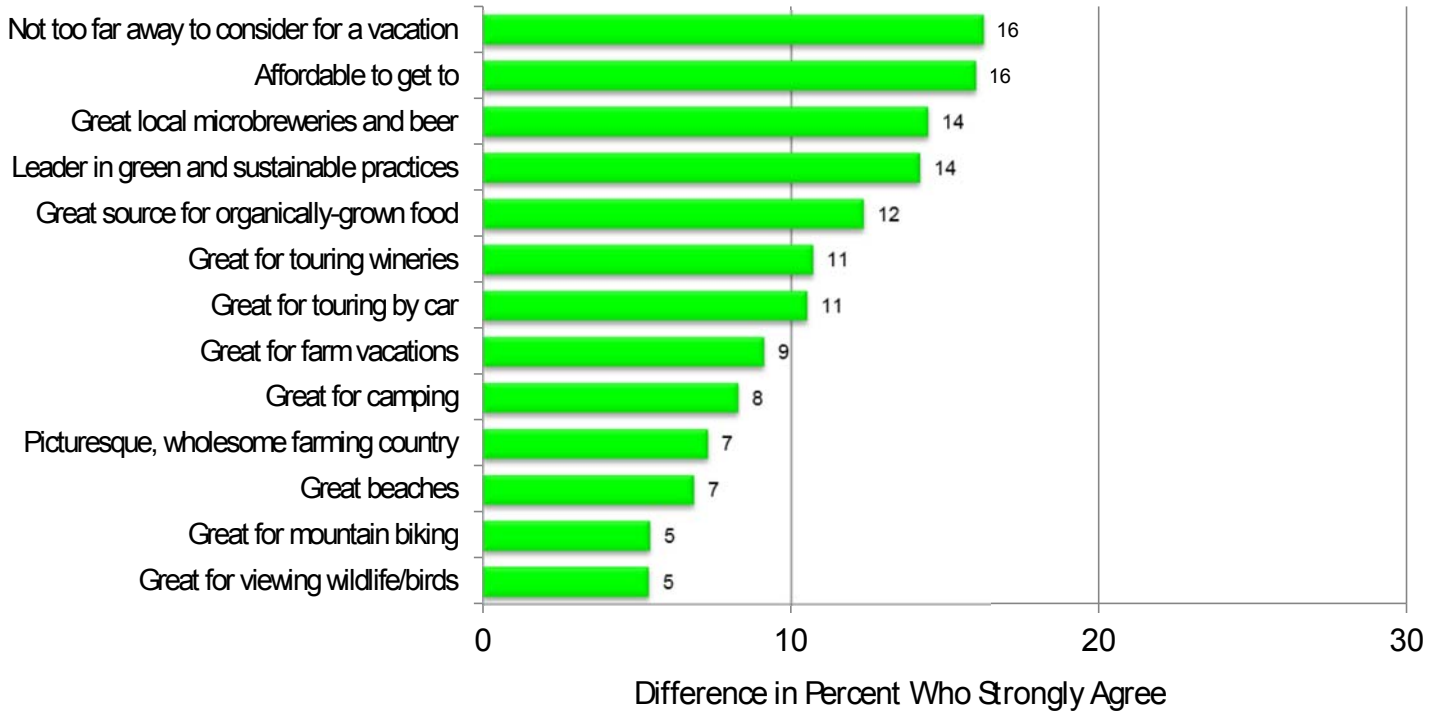


Circled attributes are image hot buttons

# Oregon's Image Strengths vs. British Columbia



Base: Regional Market

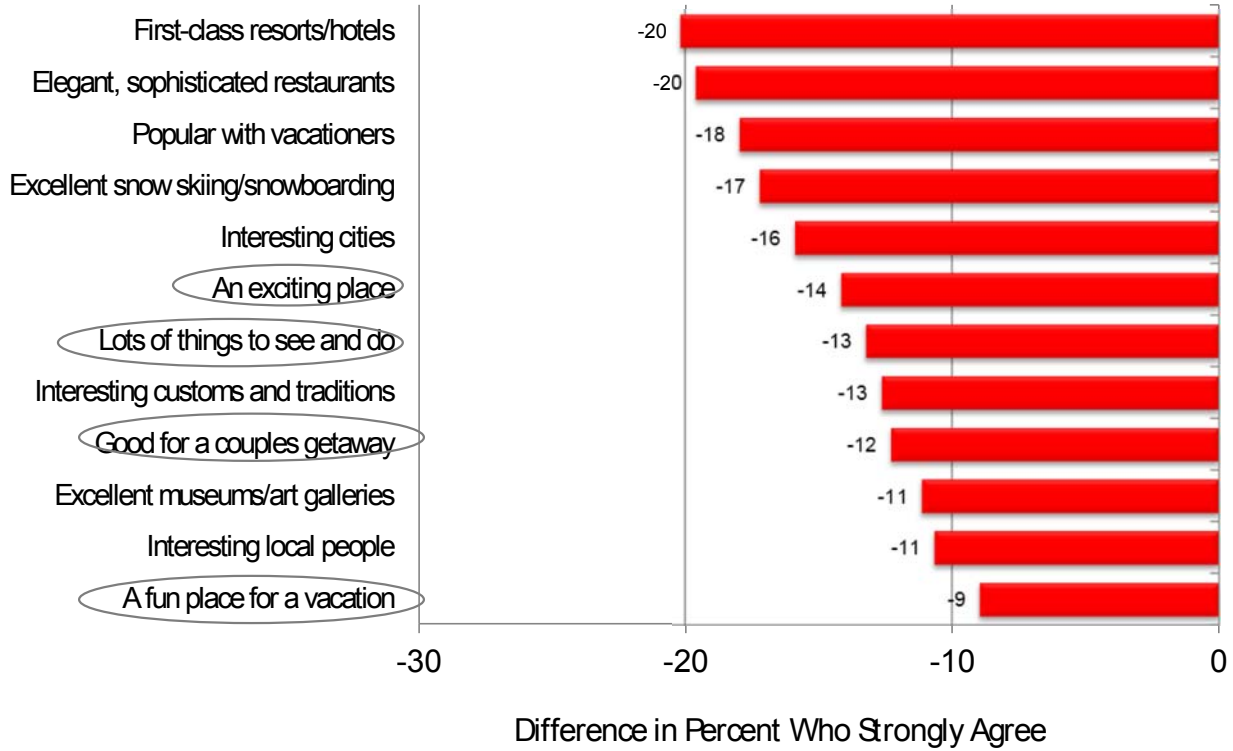


Circled attributes are image hot buttons

# Oregon's Image Weaknesses vs. British Columbia



Base: Regional Market

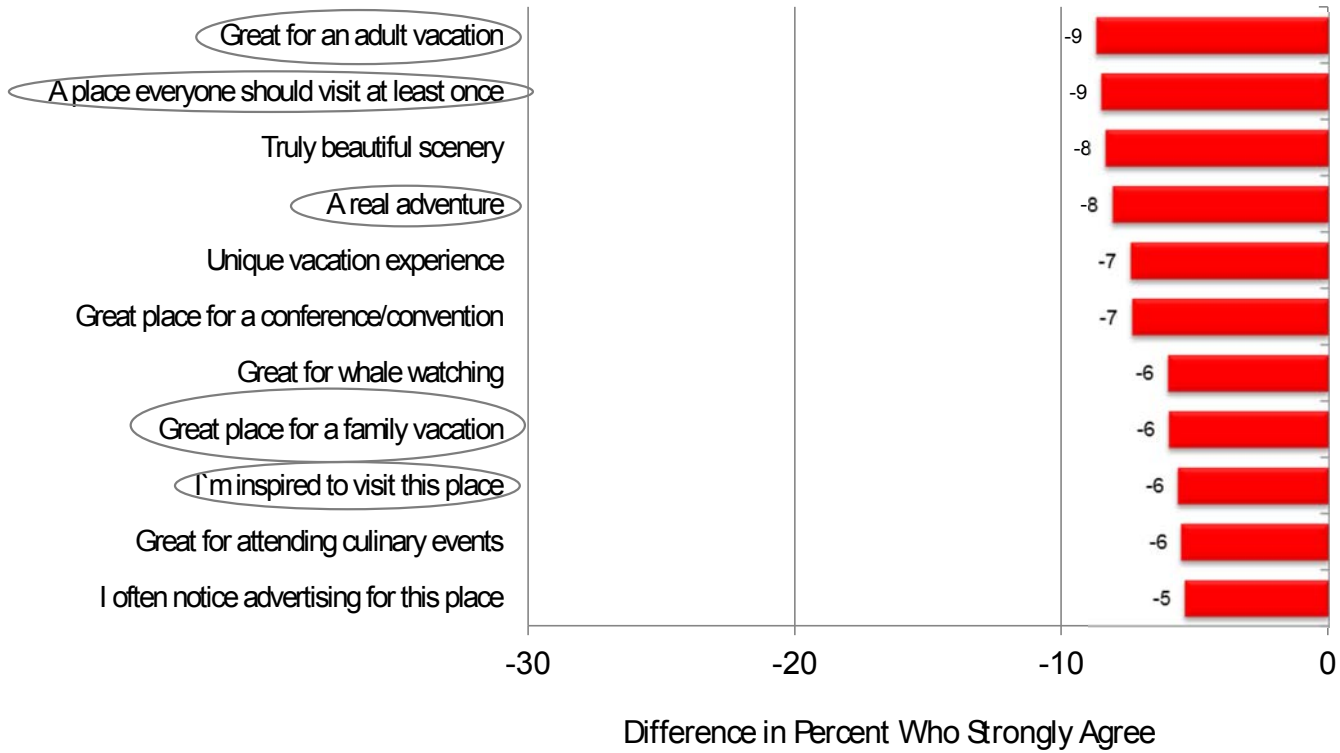


Circled attributes are image hot buttons

# Oregon's Image Weaknesses vs. British Columbia



Base: Regional Market

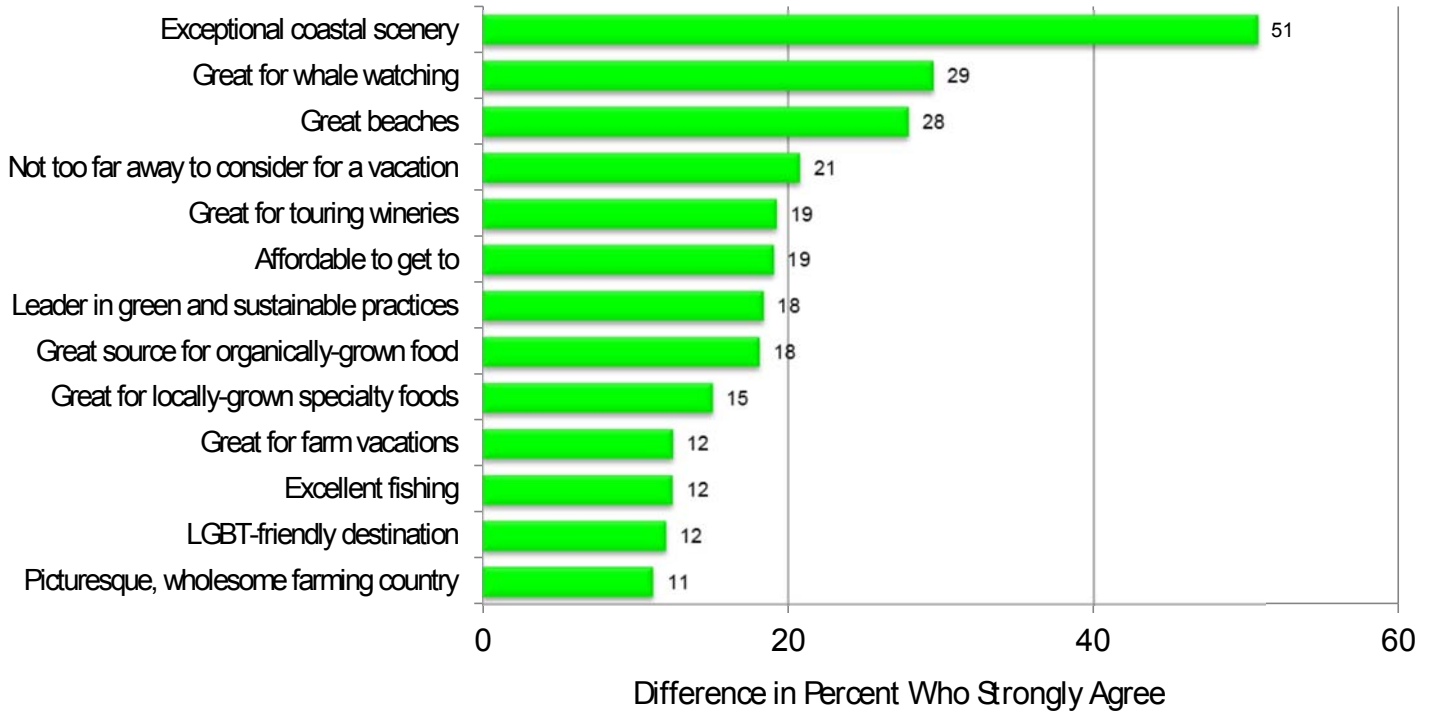


Circled attributes are image hot buttons

# Oregon's Image Strengths vs. Colorado



Base: Regional Market



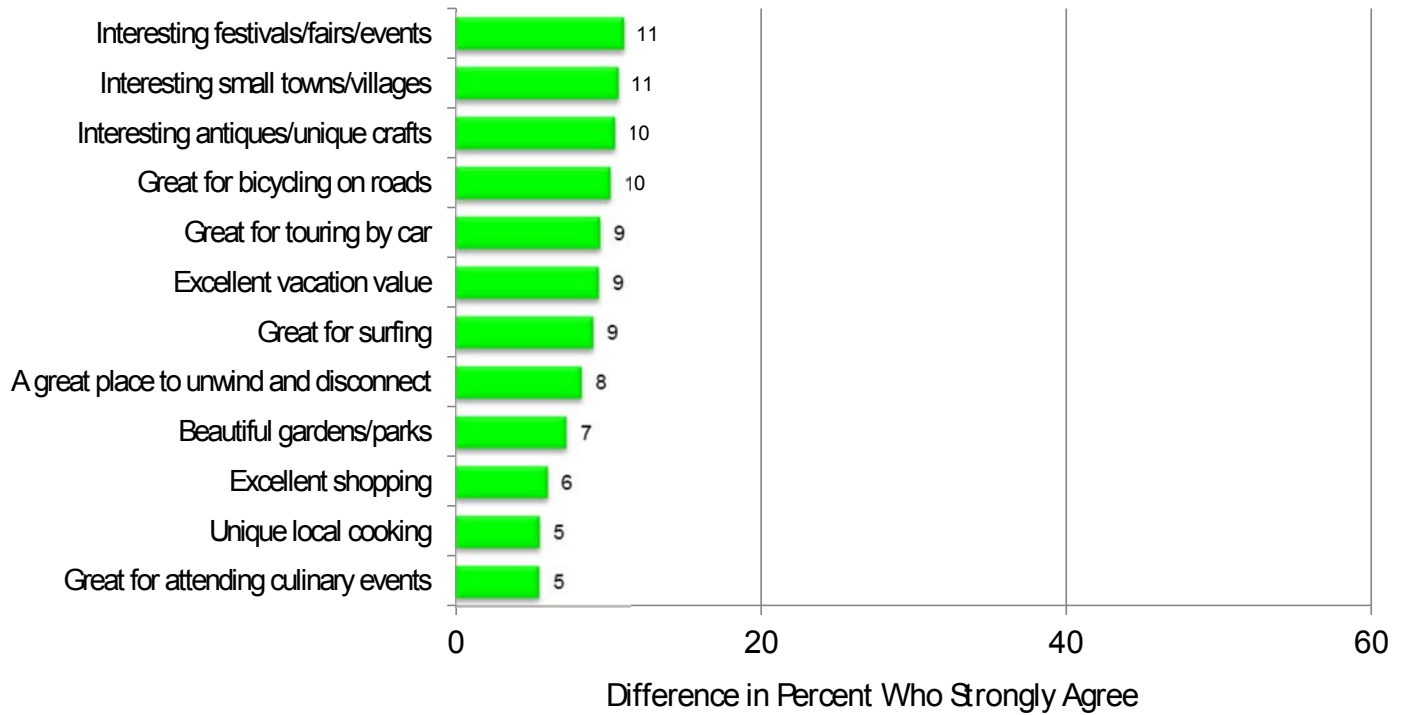
Circled attributes are image hot buttons



# Oregon's Image Strengths vs. Colorado



Base: Regional Market

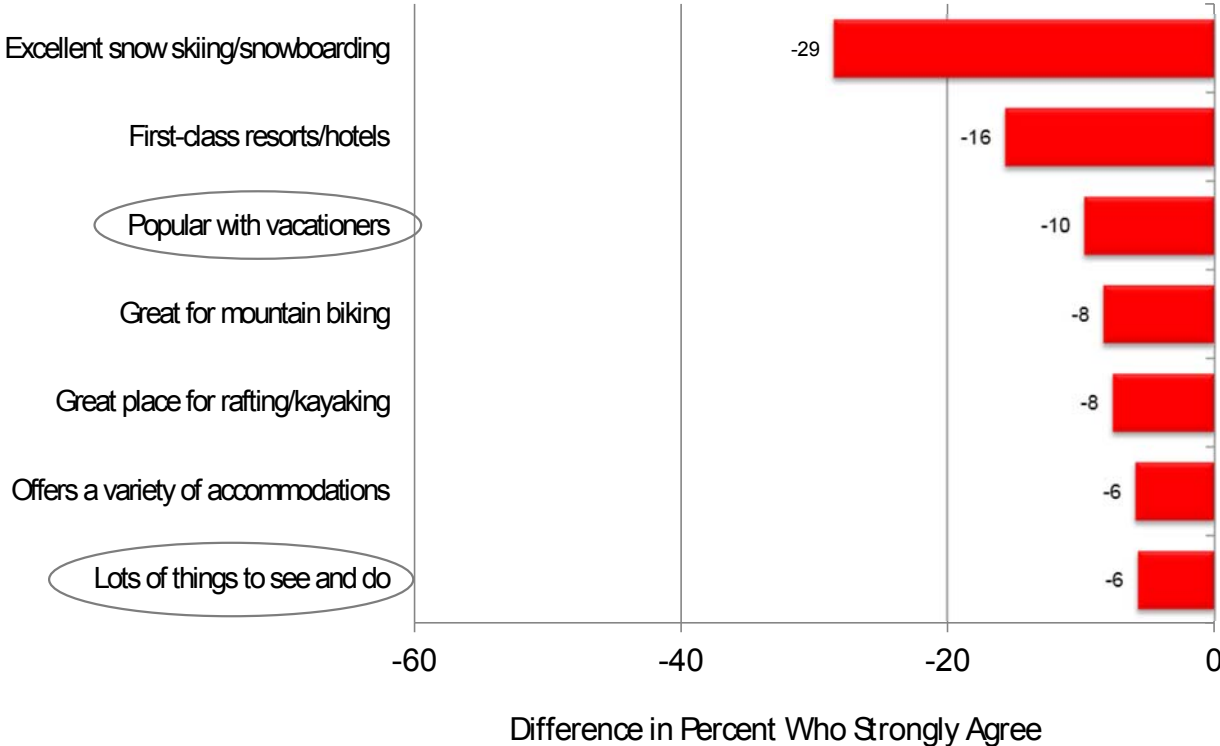


Circled attributes are image hot buttons

# Oregon's Image Weaknesses vs. Colorado



Base: Regional Market

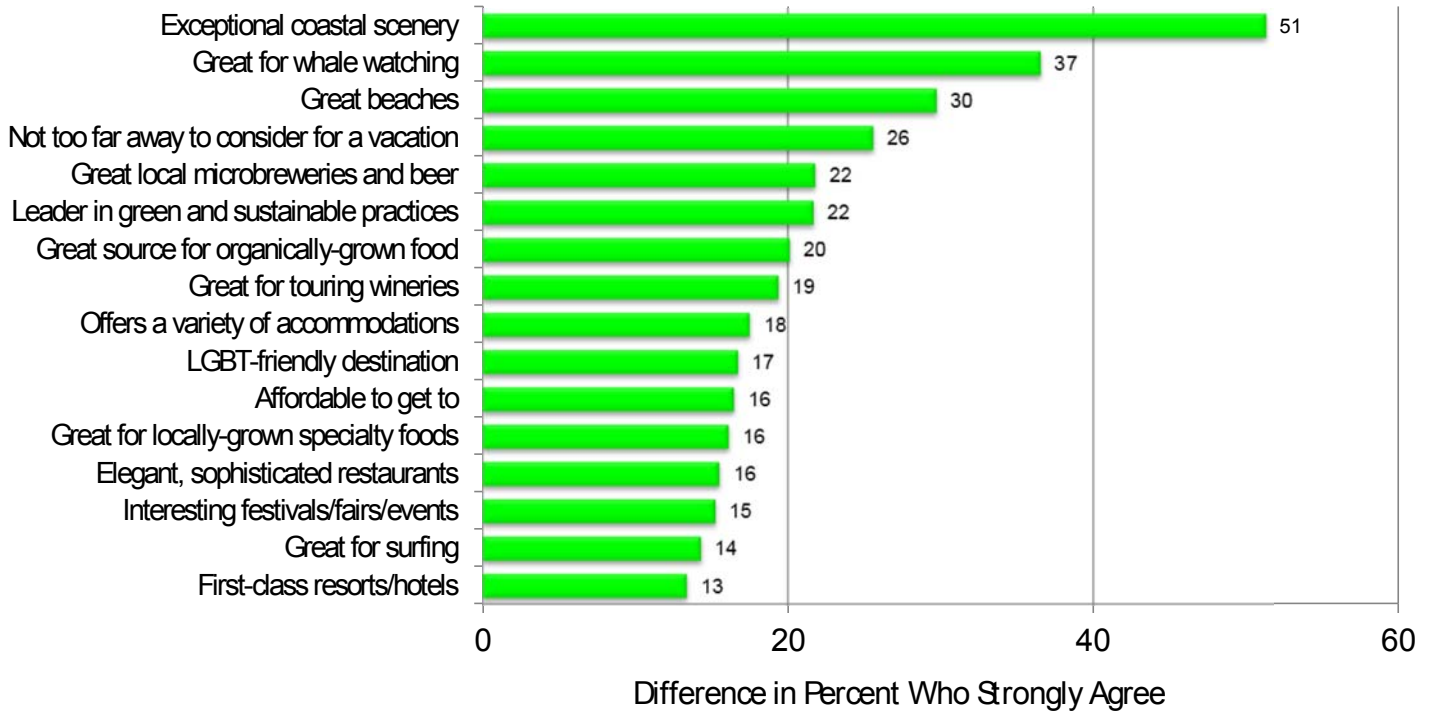


Circled attributes are image hot buttons

# Oregon's Image Strengths vs. Montana



Base: Regional Market

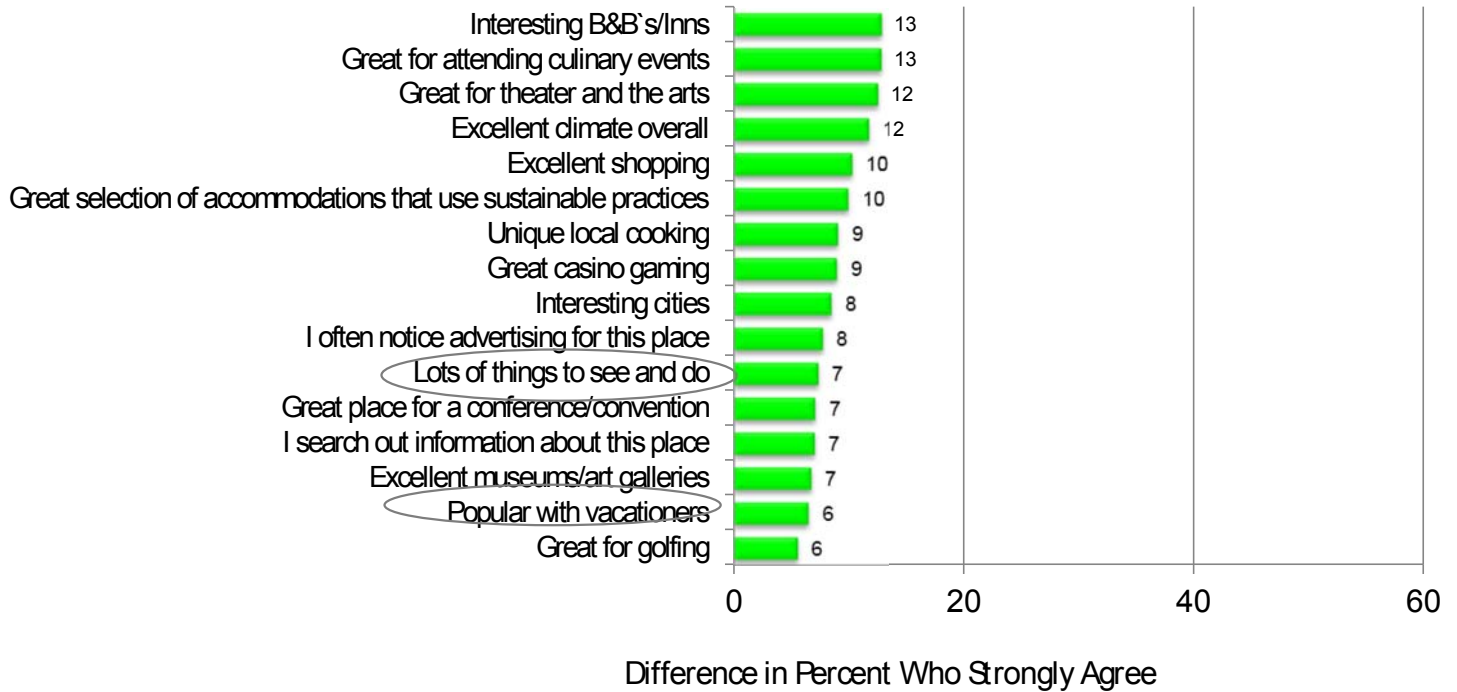


Circled attributes are image hot buttons

# Oregon's Image Strengths vs. Montana



Base: Regional Market

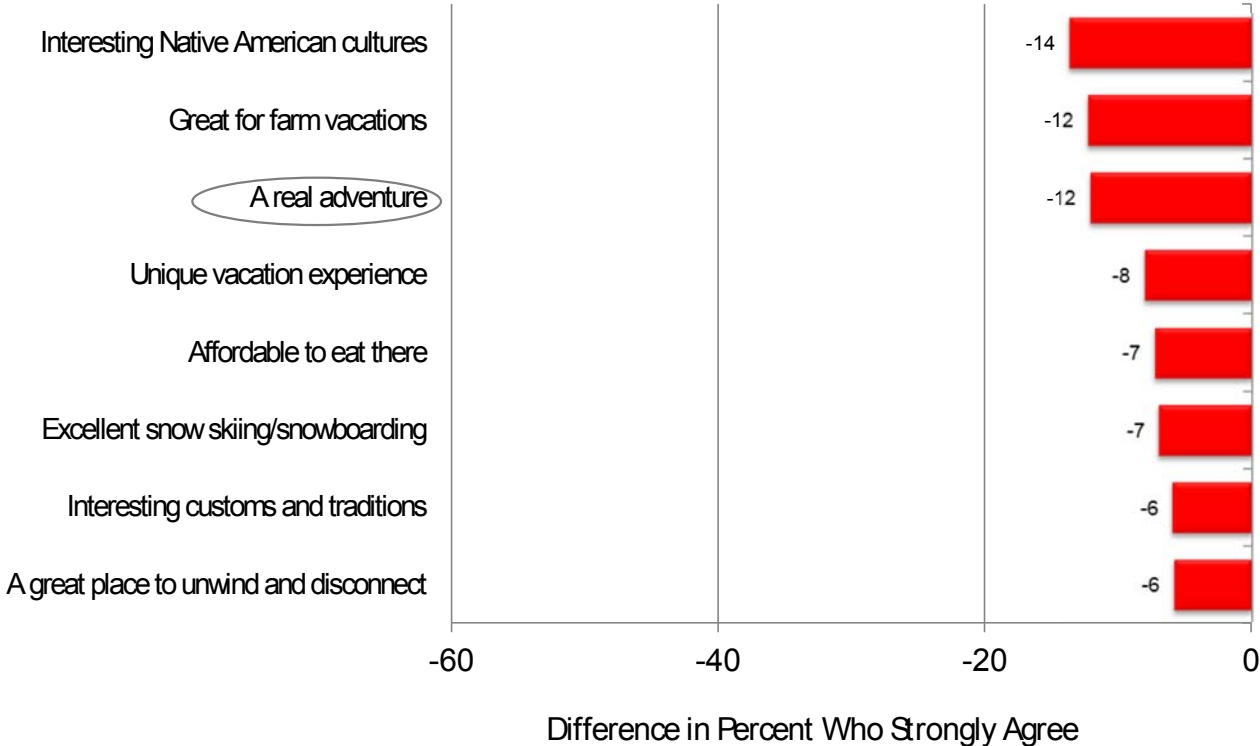


Circled attributes are image hot buttons

# Oregon's Image Weaknesses vs. Montana



Base: Regional Market

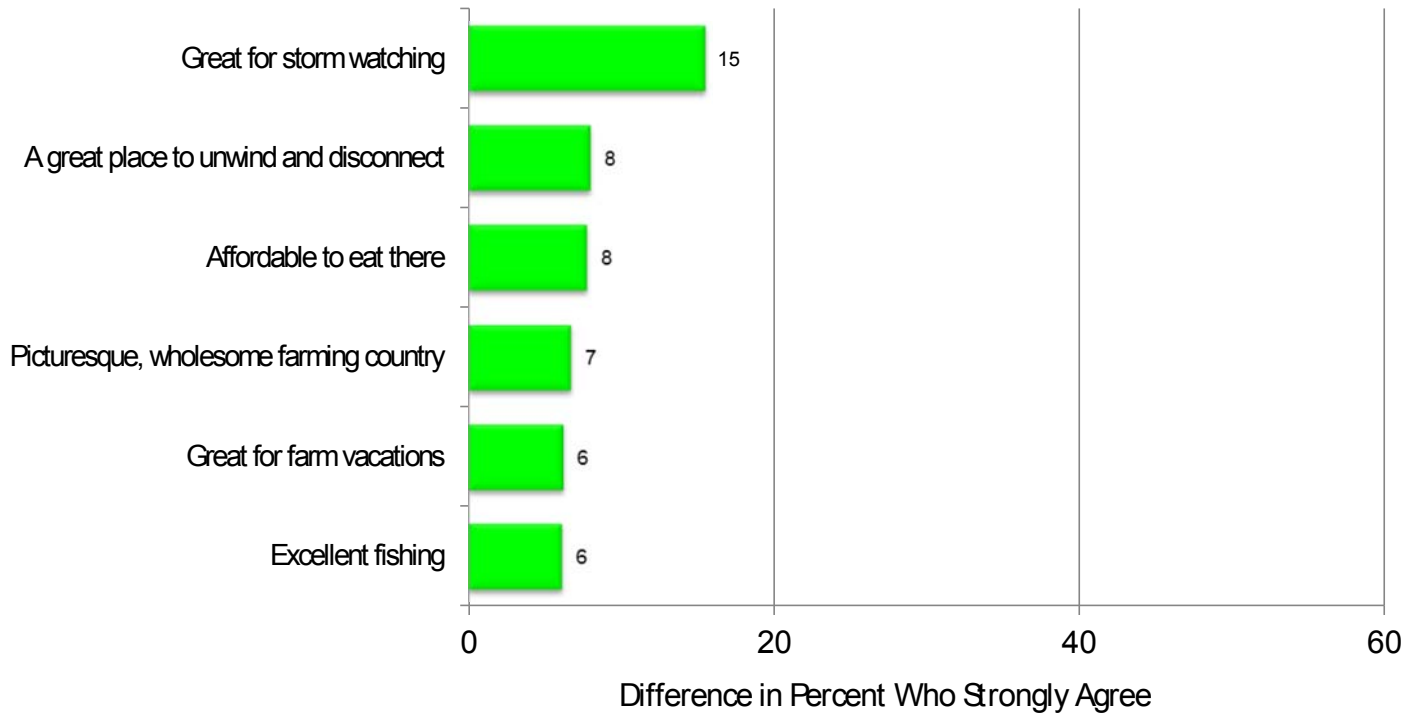


Circled attributes are image hot buttons

# Oregon's Image Strengths vs. California



Base: Regional Market

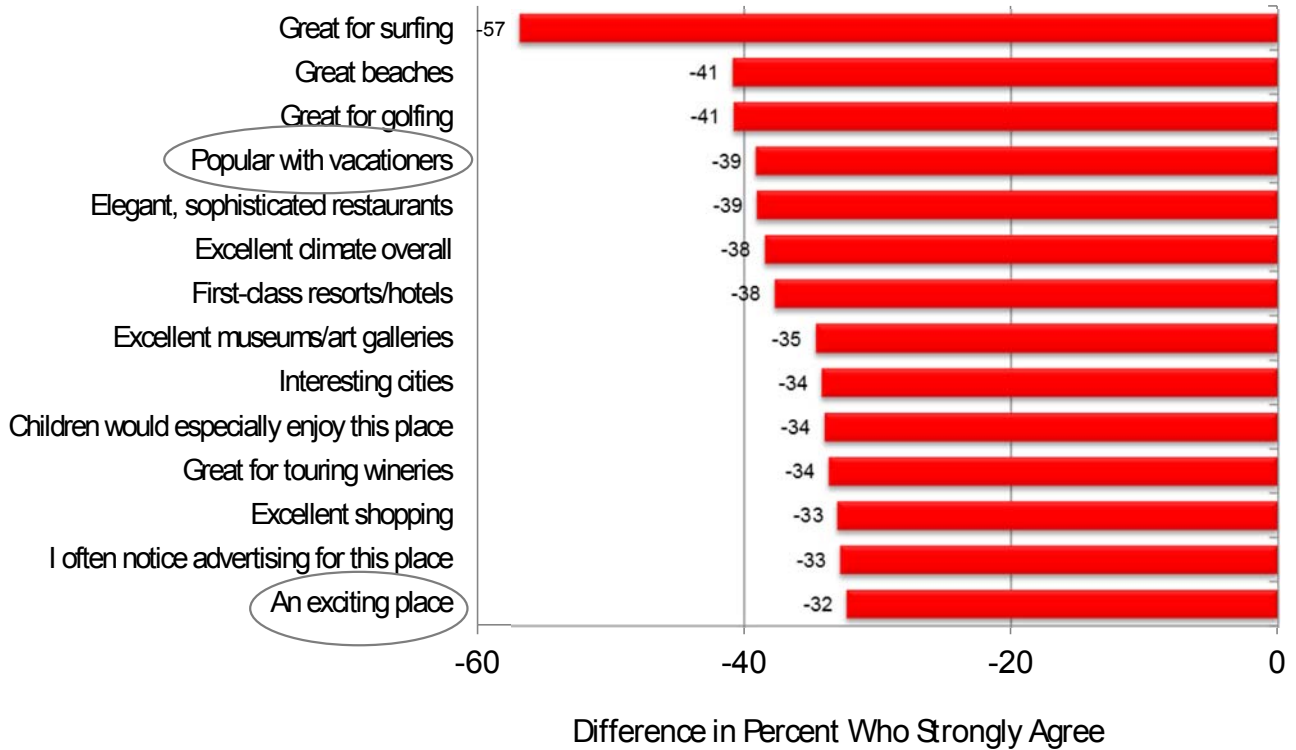


Circled attributes are image hot buttons

# Oregon's Image Weaknesses vs. California



Base: Regional Market

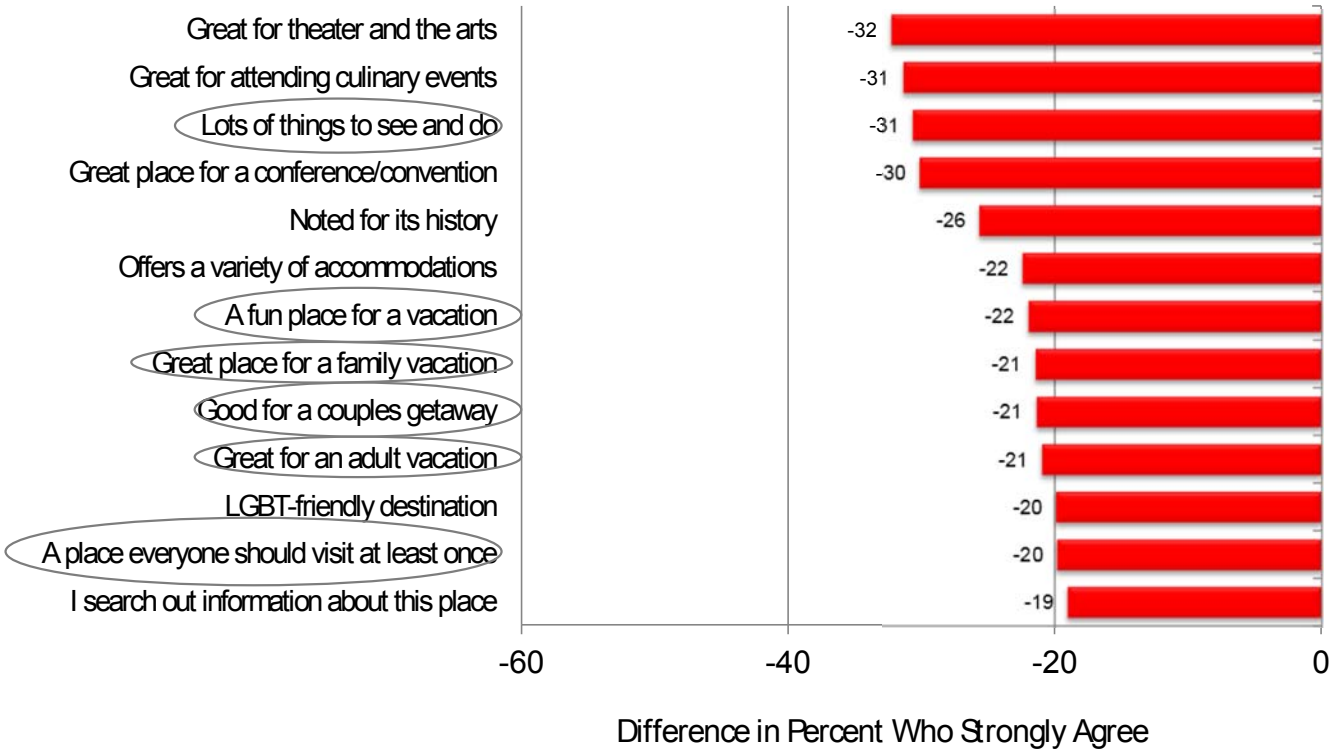


Circled attributes are image hot buttons

# Oregon's Image Weaknesses vs. California



Base: Regional Market



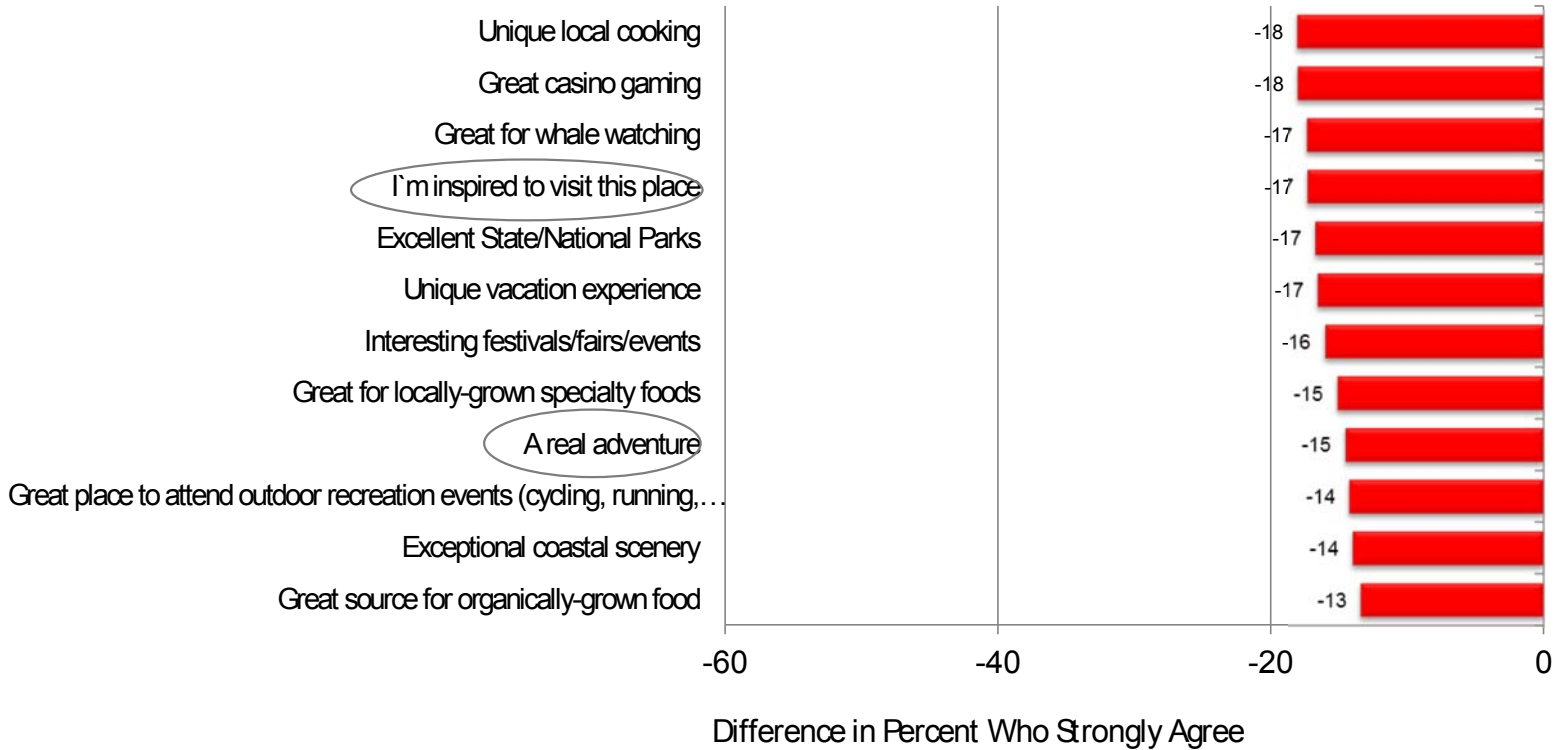
Circled attributes are image hot buttons



# Oregon's Image Weaknesses vs. California



Base: Regional Market

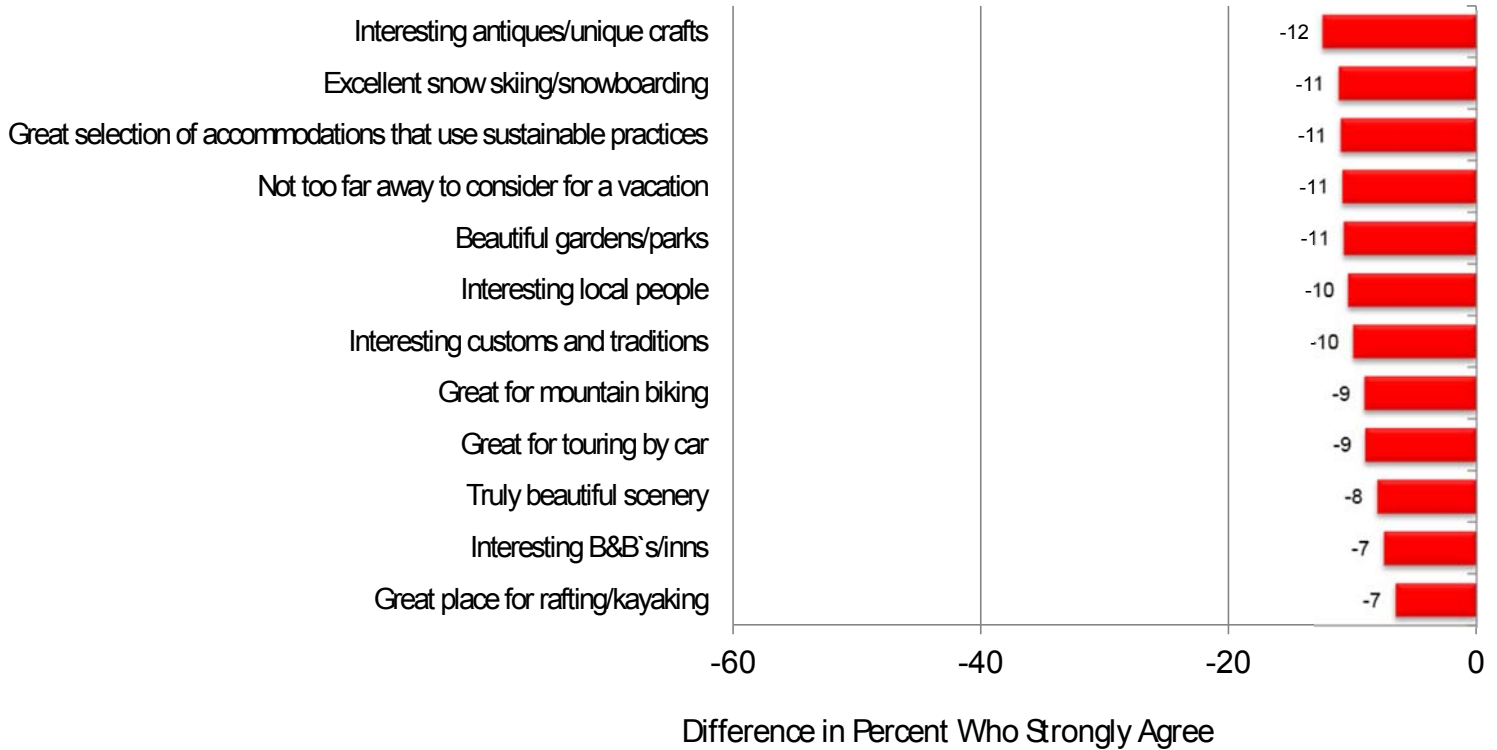


Circled attributes are image hot buttons

# Oregon's Image Weaknesses vs. California



Base: Regional Market



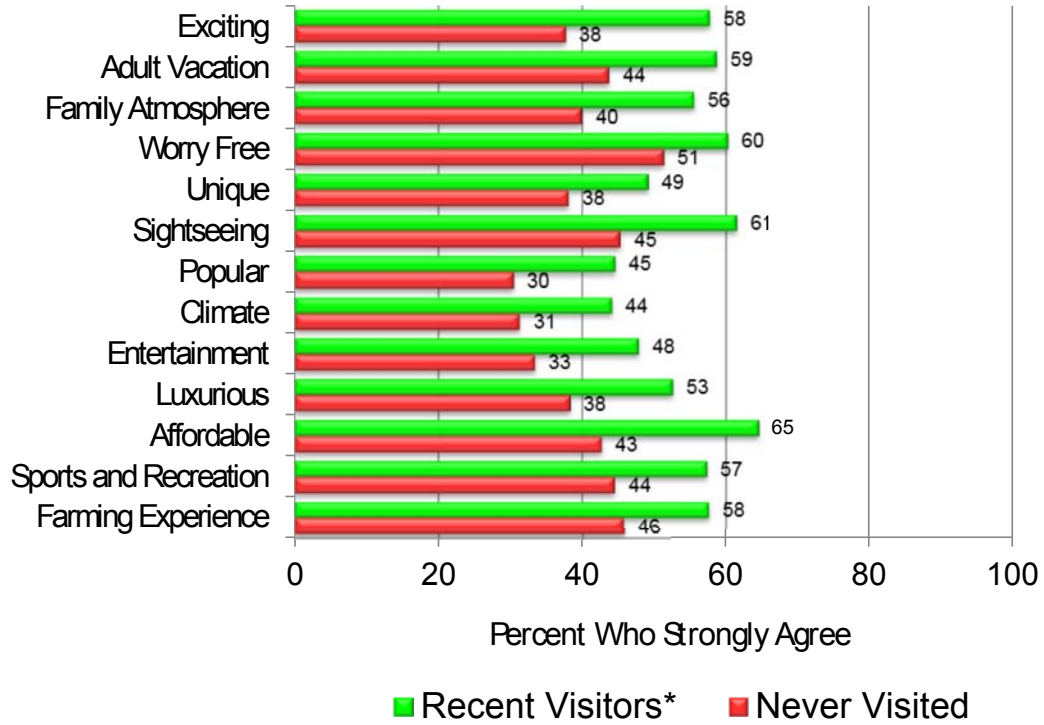
Circled attributes are image hot buttons

# Oregon's Product Delivery

# Oregon's Product vs. Image



Base: Residents of Oregon's Regional Advertising Markets

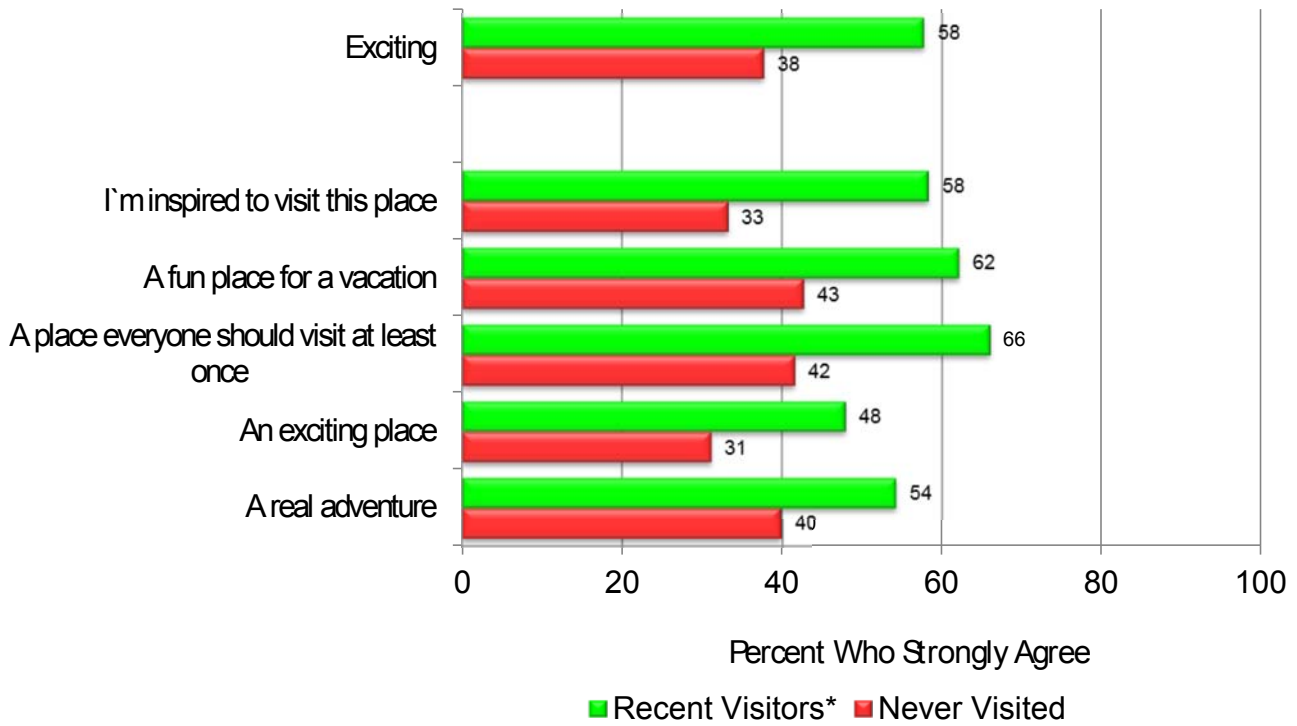


\* Visited in past two years

# Oregon's Product Delivery vs. Image — Exciting



Base: Regional Market

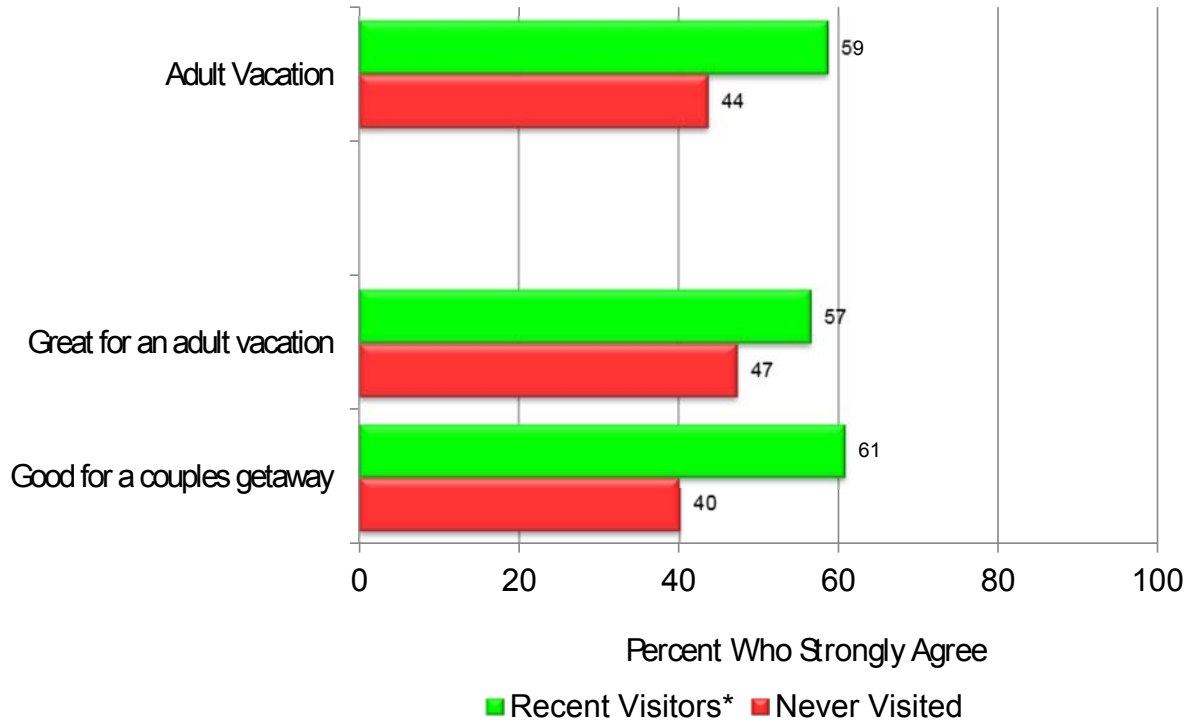


\* Visited in past two years

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



Base: Regional Market

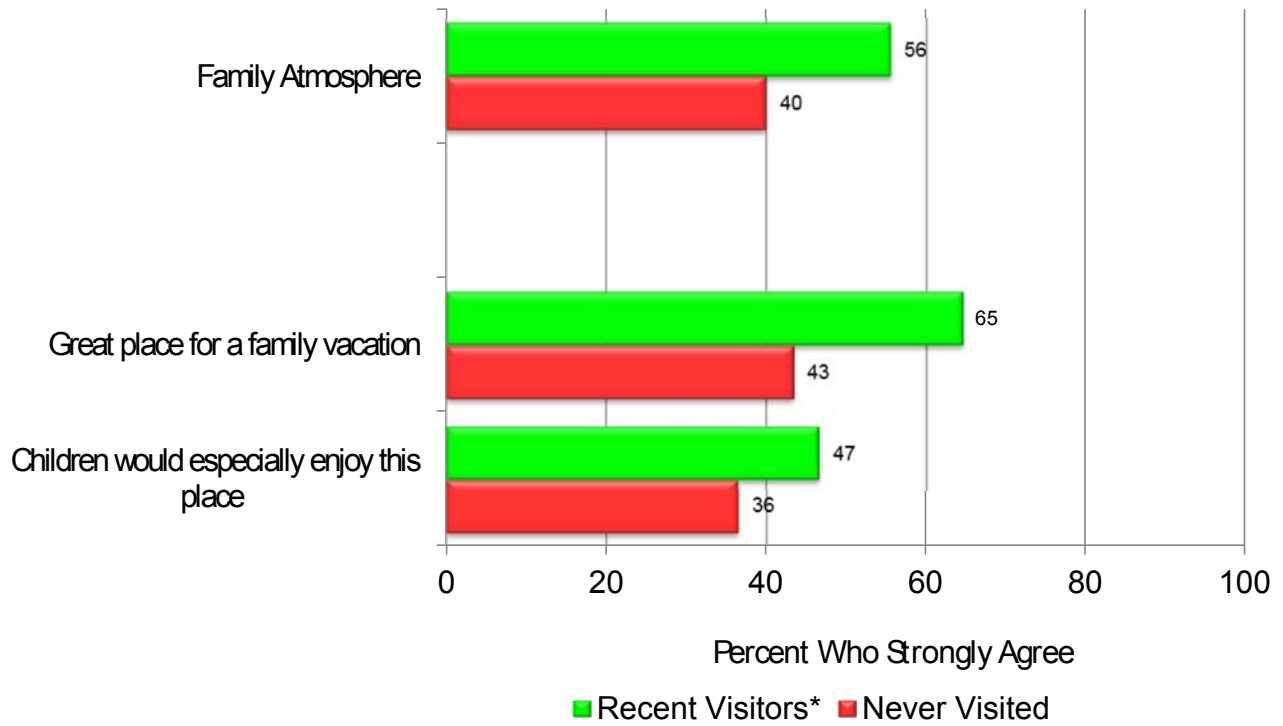


\* Visited in past two years

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



Base: Regional Market

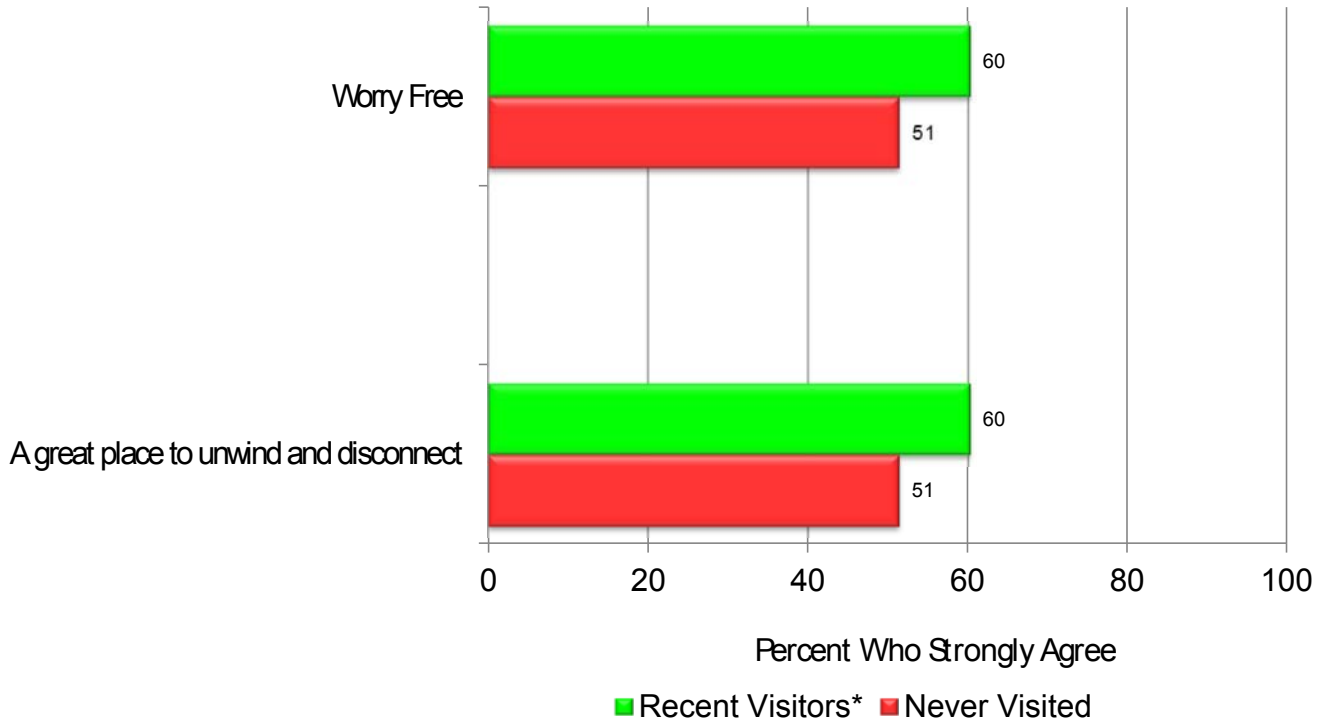


\* Visited in past two years

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



Base: Regional Market



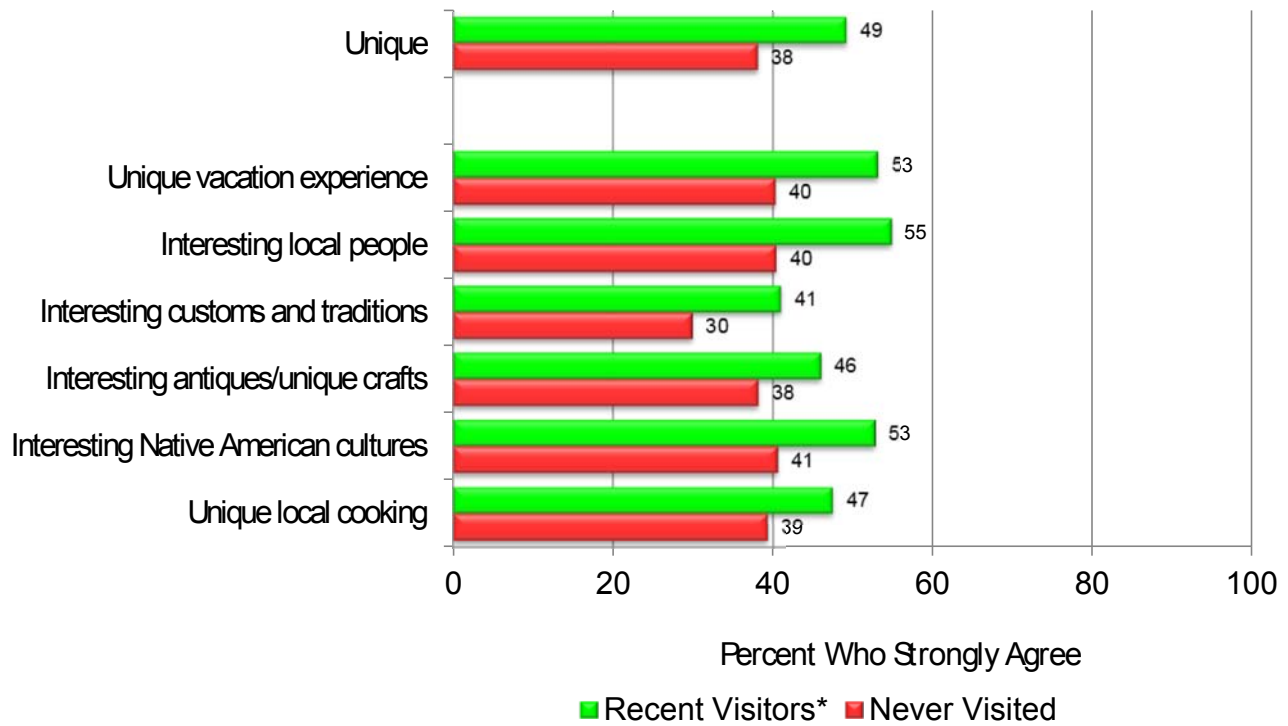
\* Visited in past two years



# Oregon's Product Delivery vs. Image — Unique



Base: Regional Market

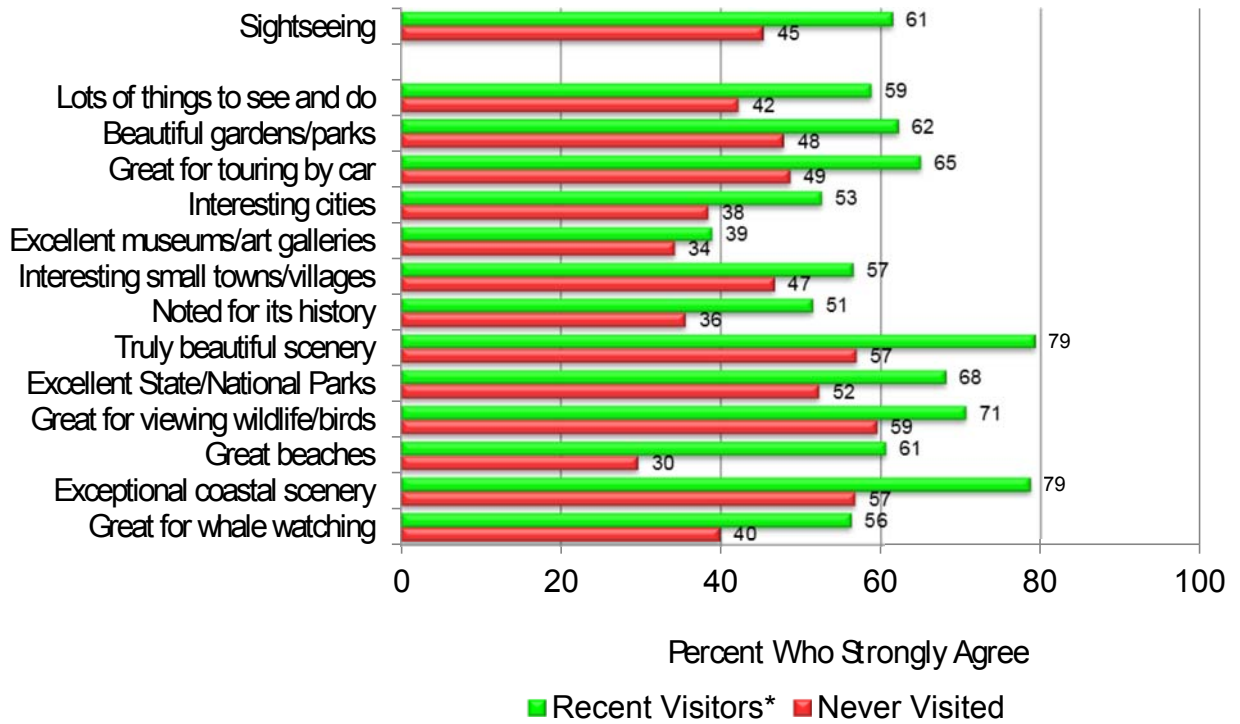


\* Visited in past two years

# Oregon's Product Delivery vs. Image — Sightseeing



Base: Regional Market

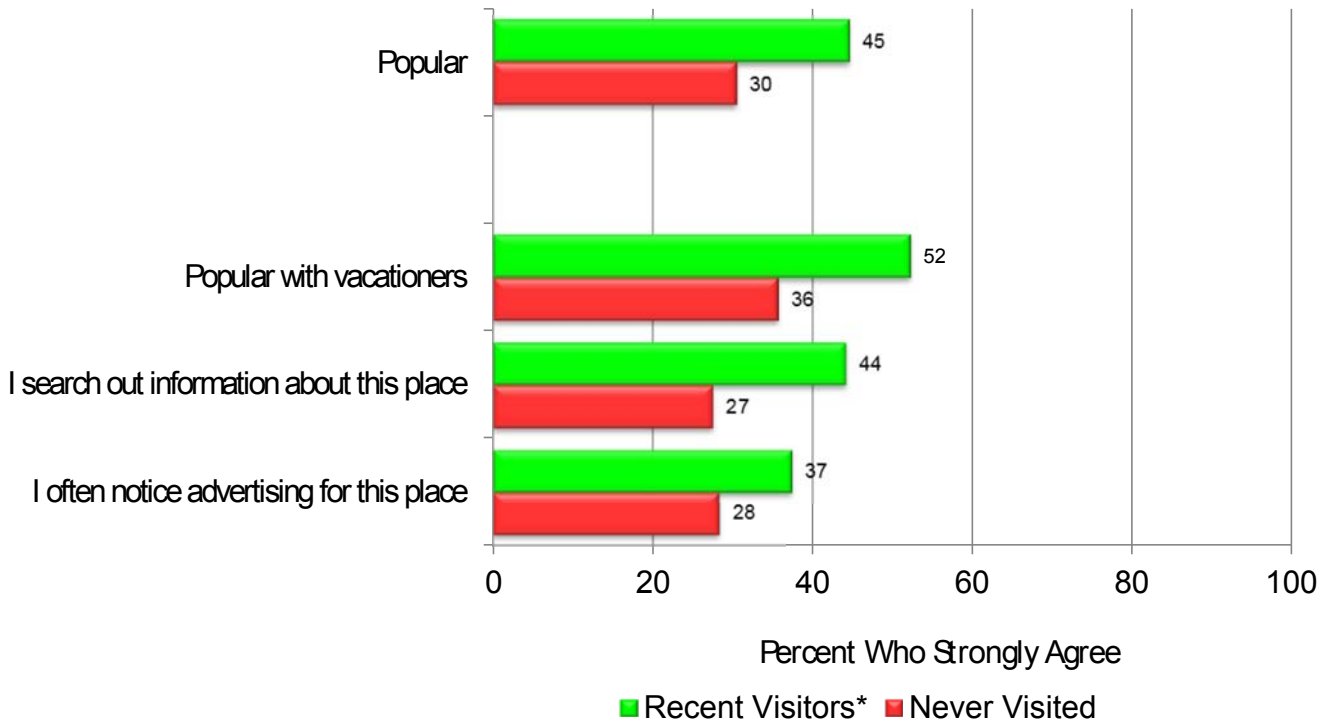


\* Visited in past two years

# Oregon's Product Delivery vs. Image — Popular



Base: Regional Market

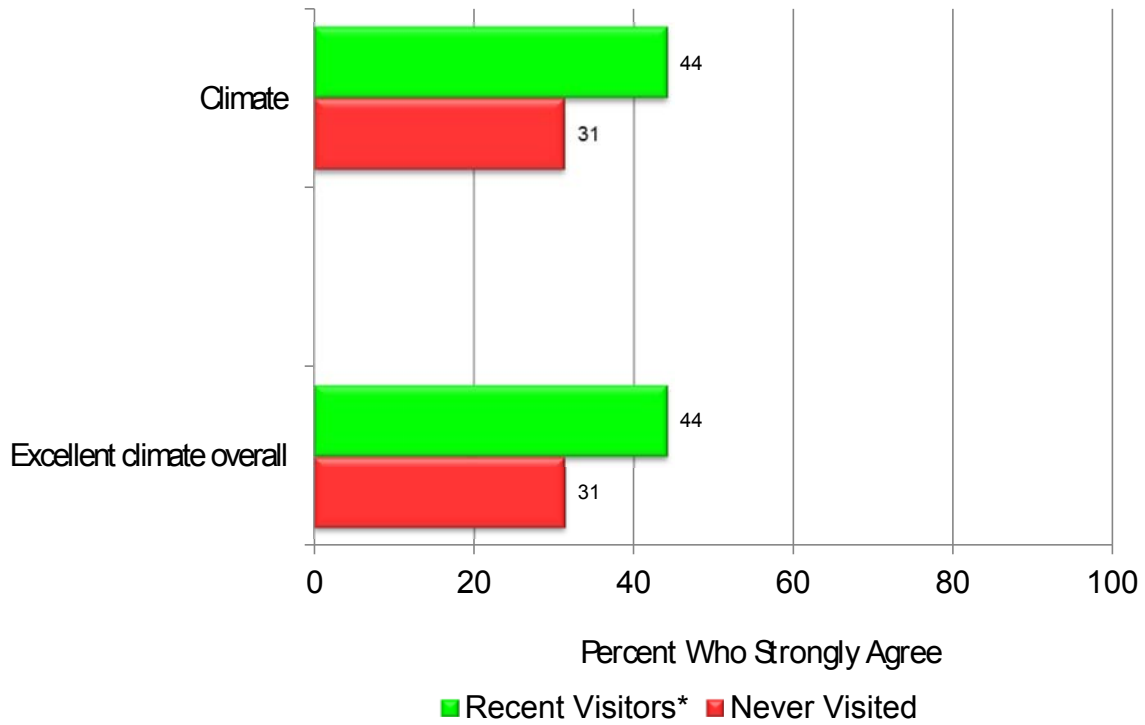


\* Visited in past two years

# Oregon's Product Delivery vs. Image — Climate



Base: Regional Market

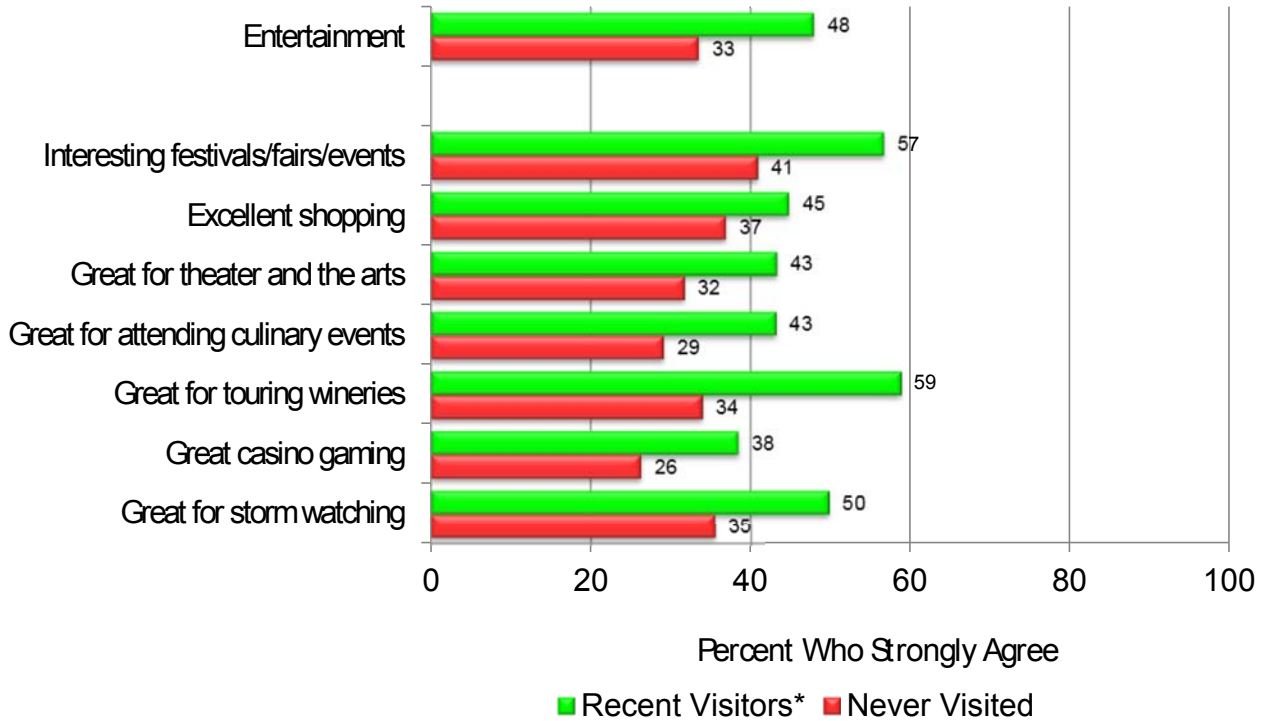


\* Visited in past two years

# Oregon's Product Delivery vs. Image — Entertainment



Base: Regional Market

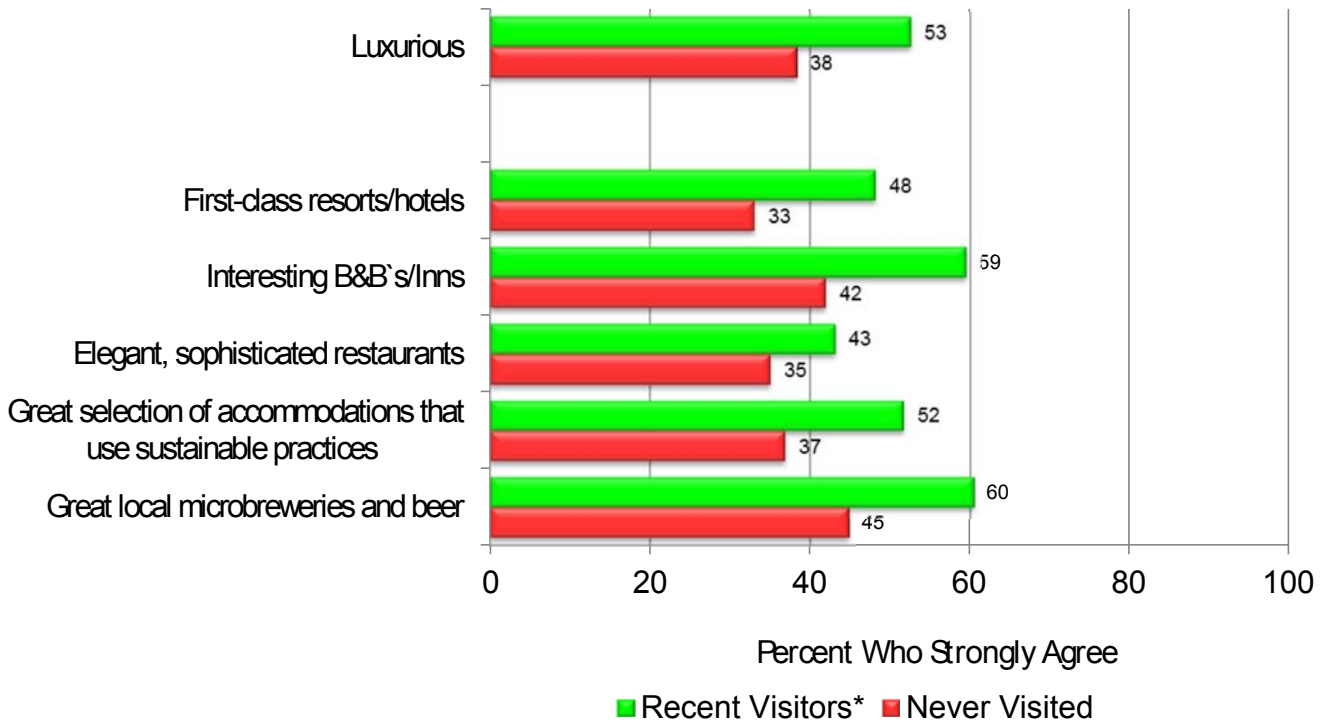


\* Visited in past two years

# Oregon's Product Delivery vs. Image — Luxurious



Base: Regional Market

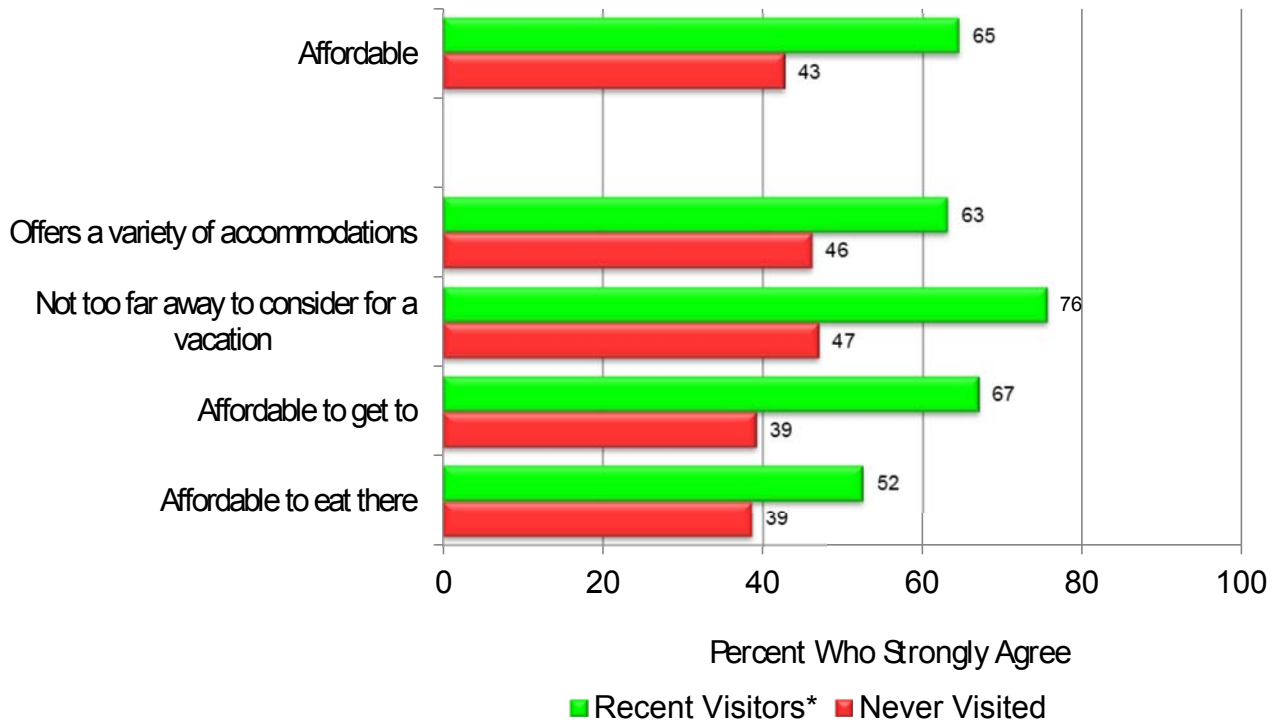


\* Visited in past two years

# Oregon's Product Delivery vs. Image — Affordable



Base: Regional Market

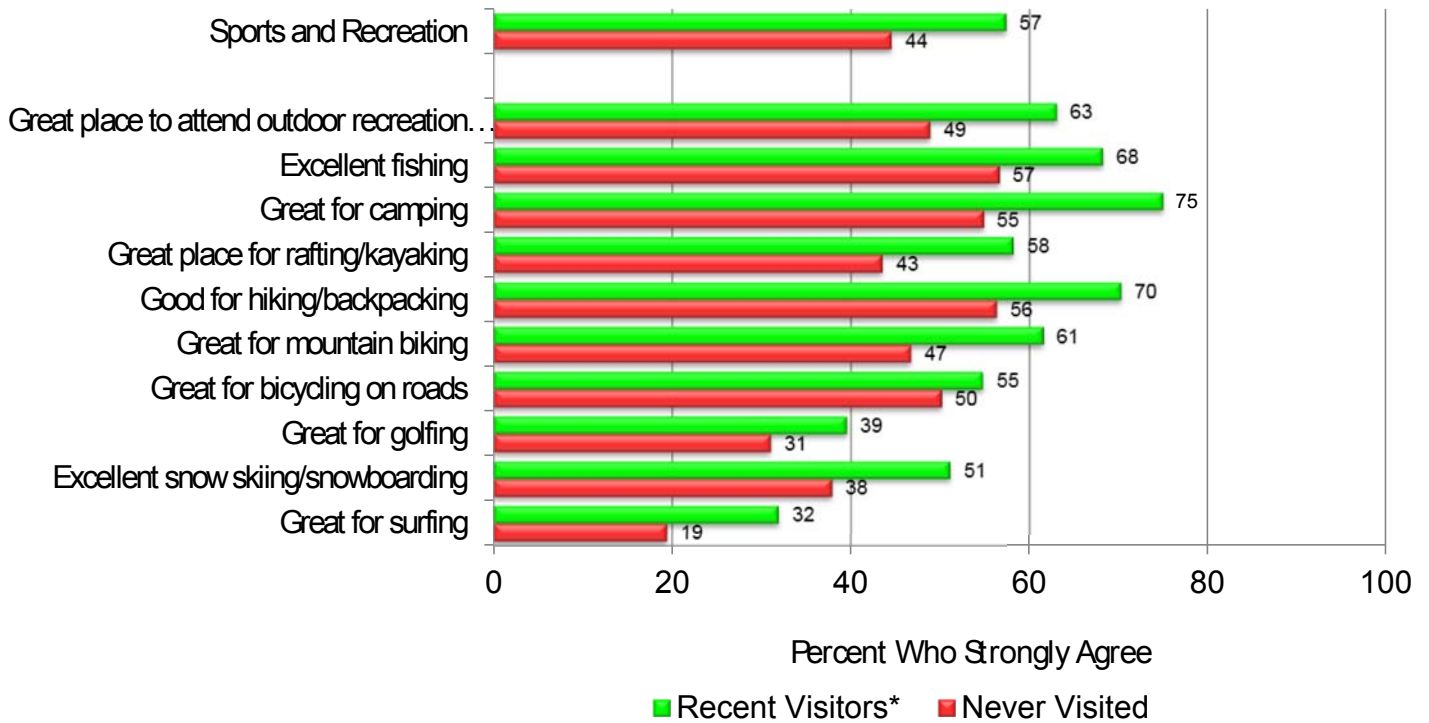


\* Visited in past two years

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



Base: Regional Market



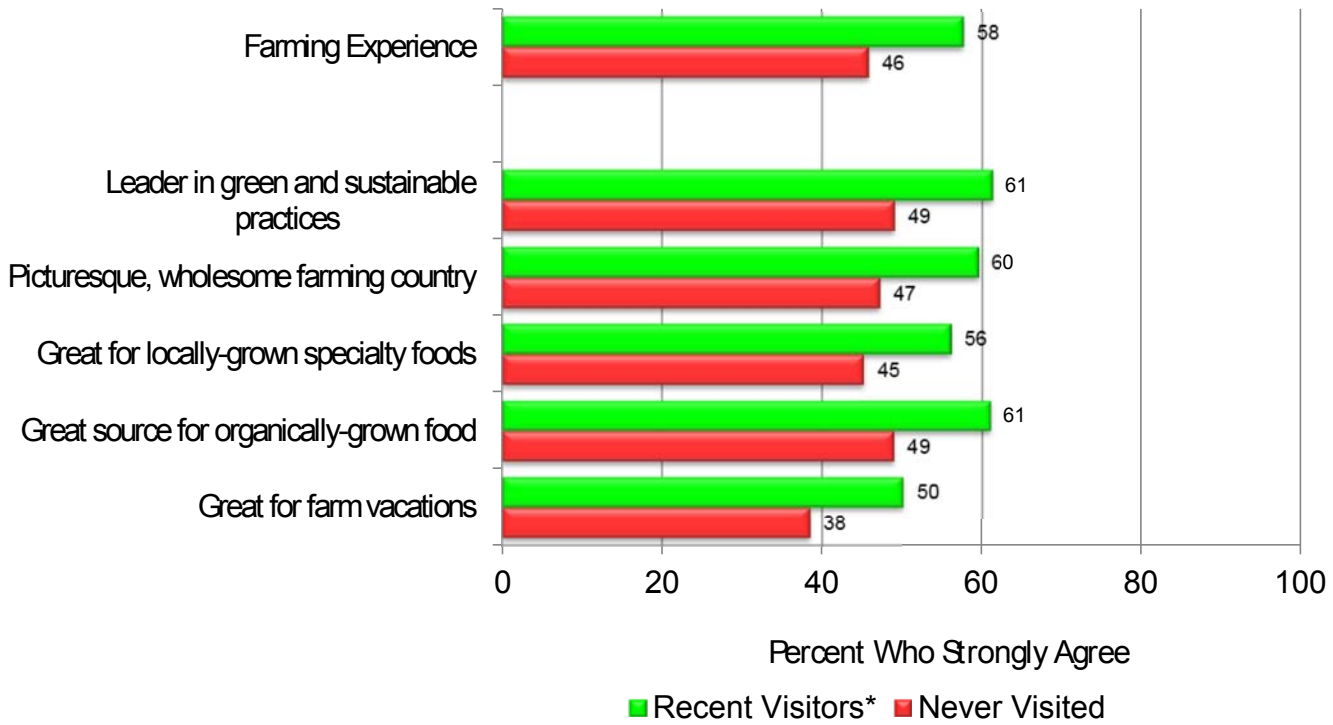
\* Visited in past two years



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



Base: Regional Market

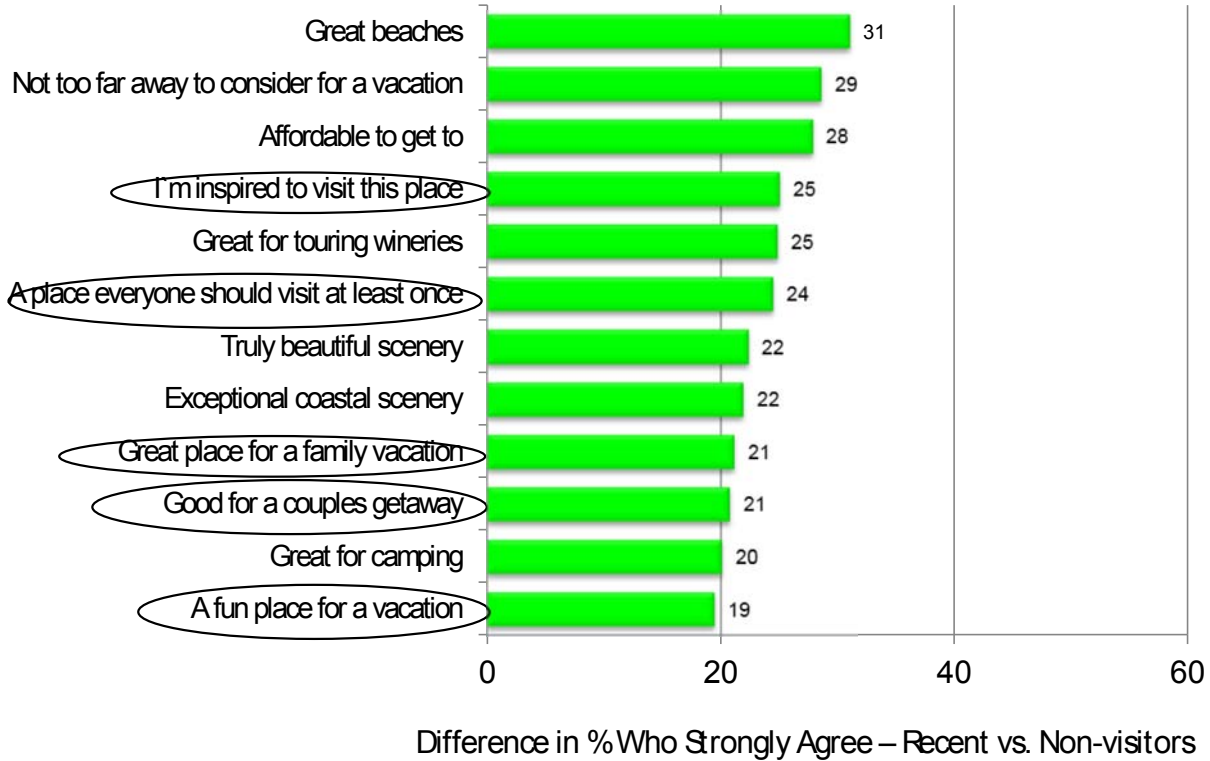


\* Visited in past two years

# Oregon's Main Product Strengths vs. Image



Base: Residents of Oregon's Regional Advertising Markets

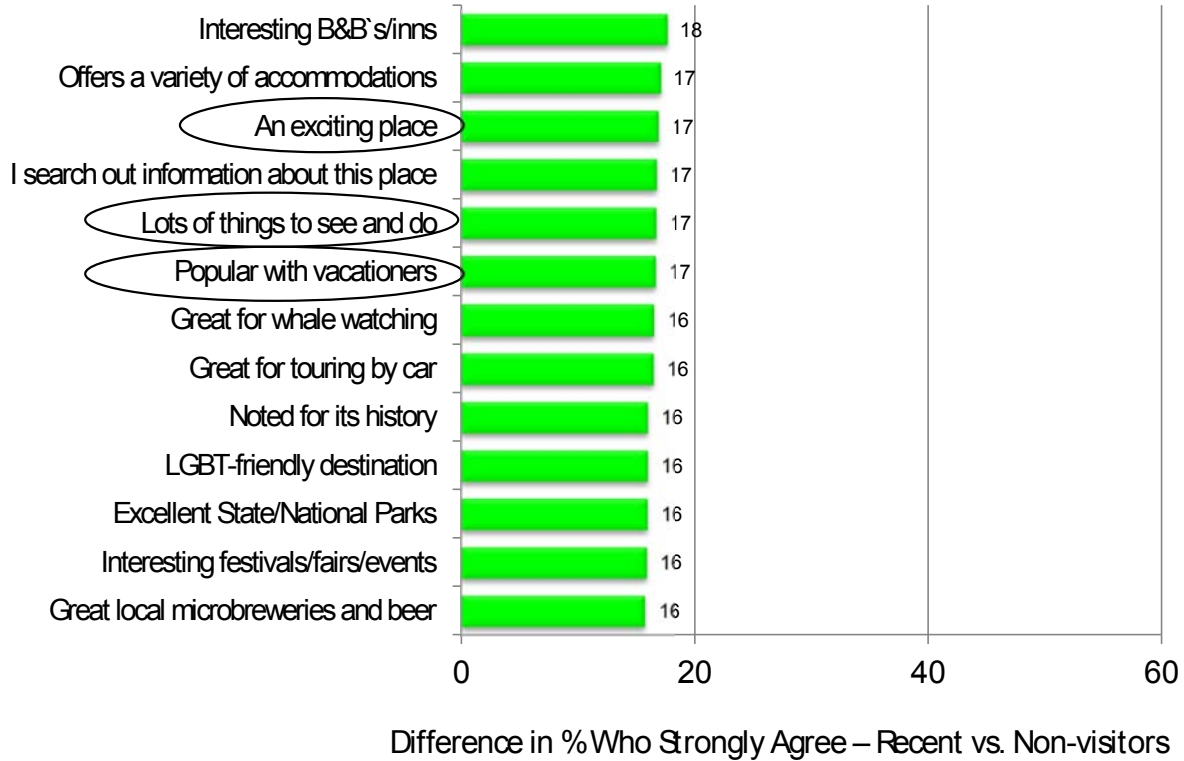


Circled attributes are image hot buttons

# Oregon's Main Product Strengths vs. Image



Base: Residents of Oregon's Regional Advertising Markets

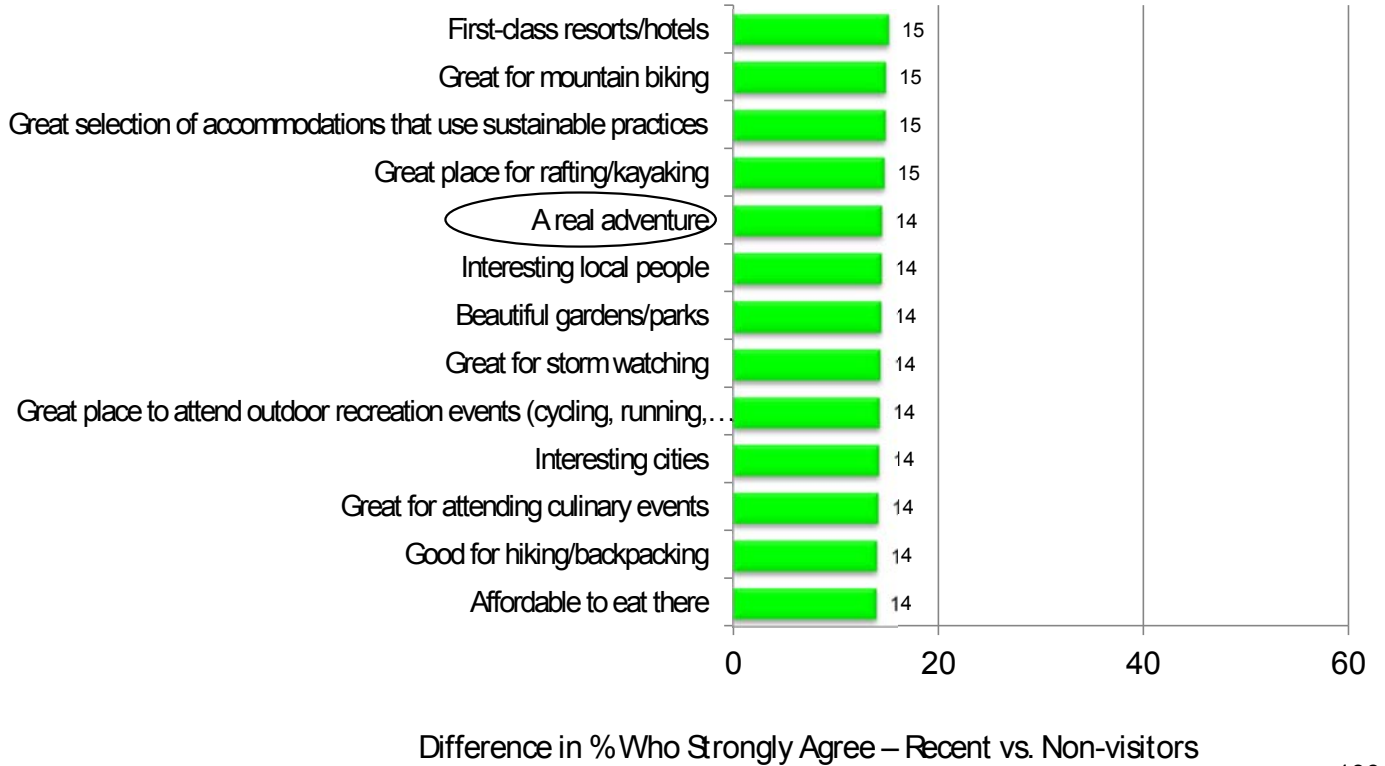


Circled attributes are image hot buttons

# Oregon's Main Product Strengths vs. Image



Base: Residents of Oregon's Regional Advertising Markets

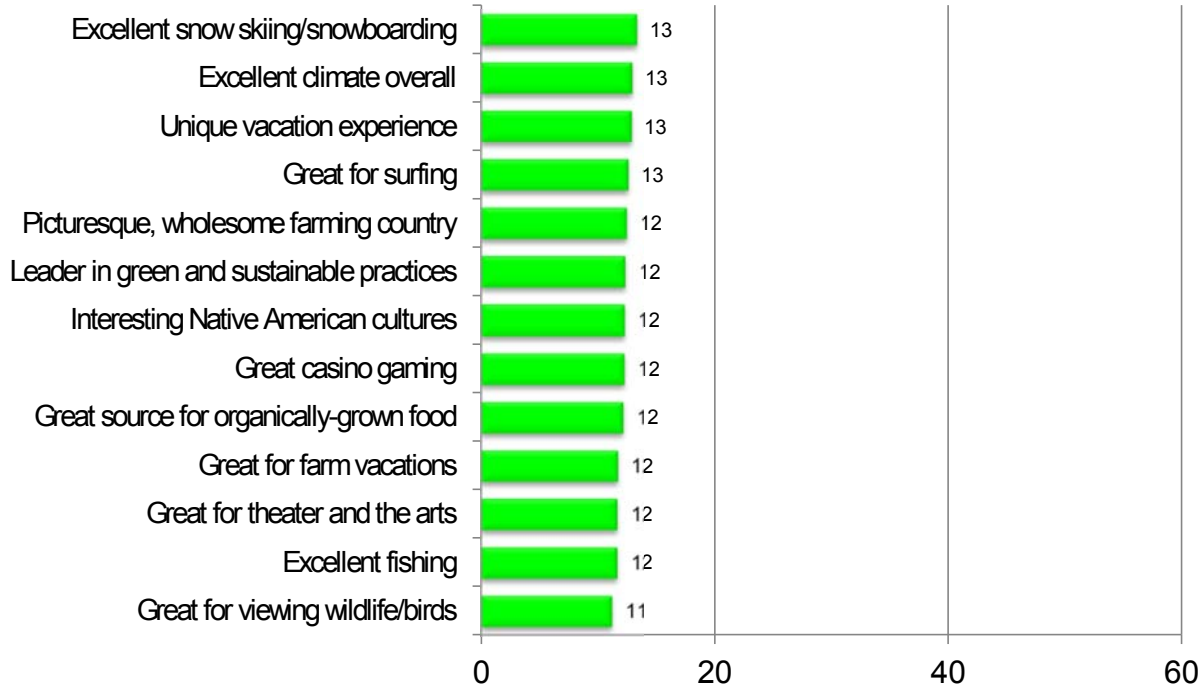


Circled attributes are image hot buttons

# Oregon's Main Product Strengths vs. Image



Base: Residents of Oregon's Regional Advertising Markets



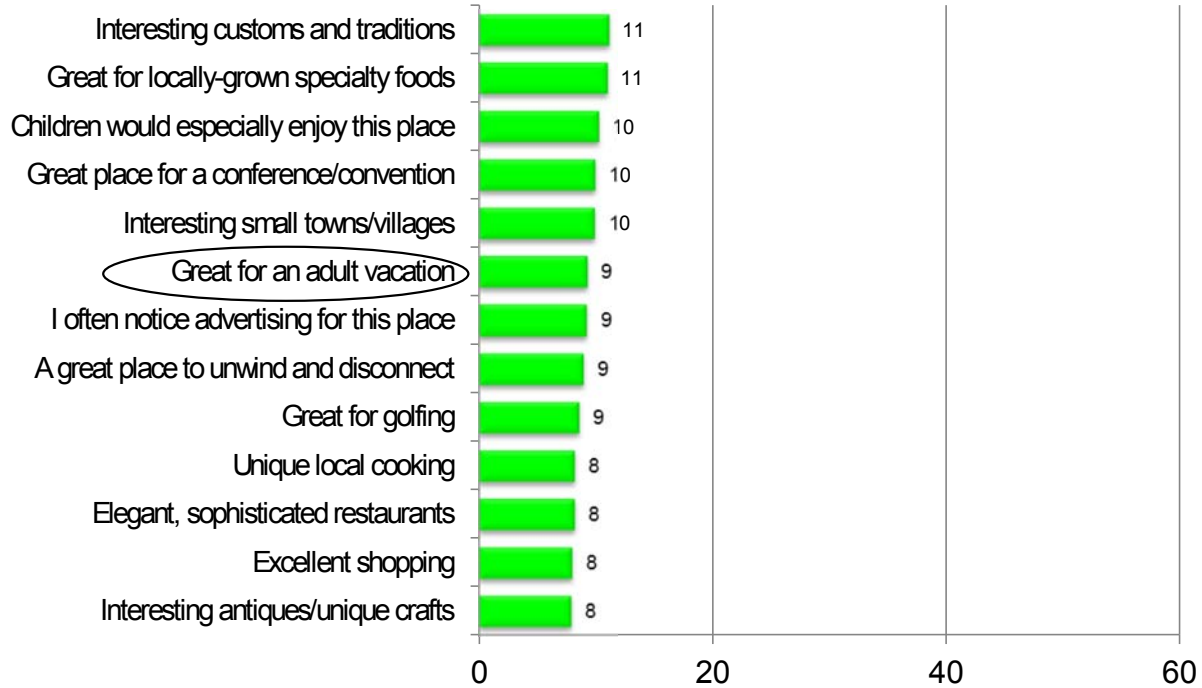
Difference in % Who Strongly Agree – Recent vs. Non-visitors

Circled attributes are image hot buttons

# Oregon's Main Product Strengths vs. Image



Base: Residents of Oregon's Regional Advertising Markets



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

Circled attributes are image hot buttons

# Oregon's Product Weaknesses vs. Image



**No Product Weaknesses  
vs. Image**

Creative



# Fall Bounty



A food festival for people who like food



Portland is situated in the ingredient epicenter of the world. So we decided it's high time we had our own world-class celebration of food, drink and everything else that makes Oregon awesome. It's called **Feast Portland**. And if you like food, you're invited.

Chefs, food writers and food lovers from across the country will descend on Portland for **four days** of tastings, lectures, an Asian-themed night market, a competitive sandwich invitational and meal after meal after meal. So clear your calendars for **September 20-23**.

Better yet, add a few days to either end of your visit with one of our **Trails to Feast** adventures. Eat and drink your way across Oregon as you meet the growers, brewers, roasters, vintners, ranchers, fishermen, farmers and, of course, chefs who ensure **Oregon has the best food around**.

Learn more at [traveloregon.com/feast](http://traveloregon.com/feast)

Trails to Feast  
Chef Gregory Gourdet

Trails to Feast  
The New Wine Pioneers

Trails to Feast  
Oregon Beer Loop

Get Going!

LET'S GET SOCIAL




Introducing FEAST Portland  
September 20-23



Get Tickets

Eat your way  
across Oregon



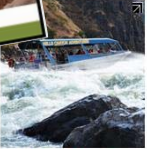


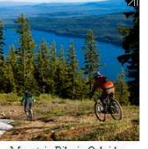
Get Going!

# Spring Outdoor Adventure



Oregon Adventurecation

What kind of Oregon adventurer are you? Click your 3 favorites below and we'll show you your ultimate Oregon Adventurecation itinerary.

 Jet Boat Hells Canyon	 Climb Smith Rock	 Surf the Oregon Coast
 Windsurf the Columbia River Gorge	 Paddle the Tualatin River	 Mountain Bike in Oakridge

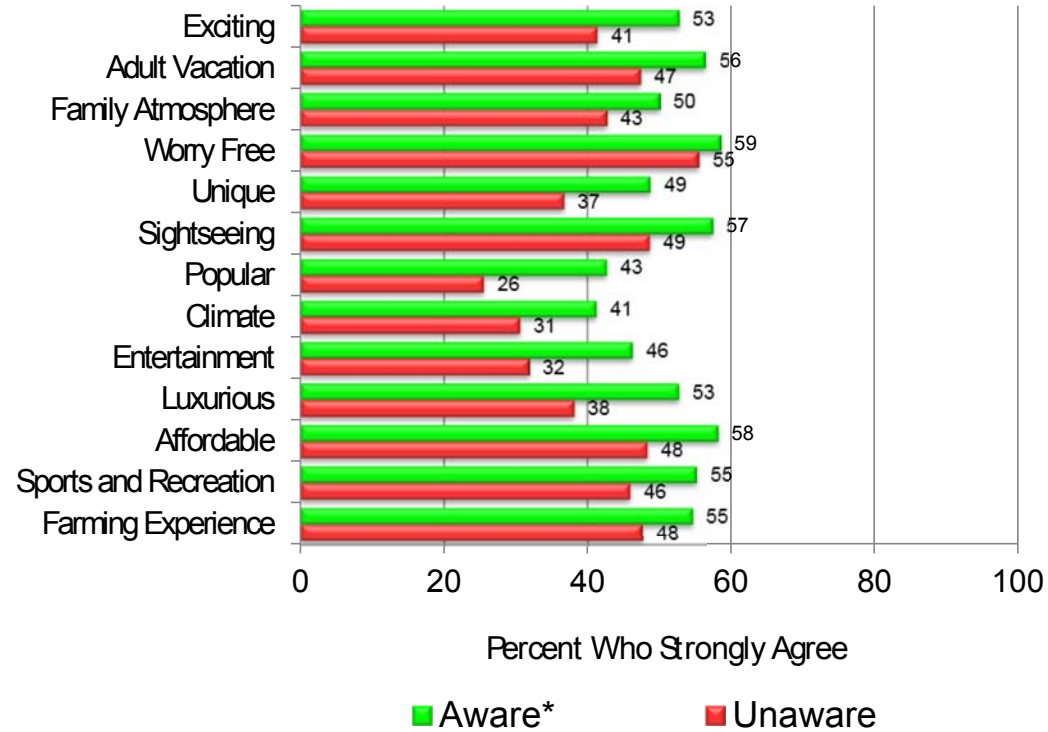
# Impact of Advertising on Image

# Impact of Advertising on Image

## □ Total Regional Market



Base: Residents of Oregon's Regional Advertising Markets

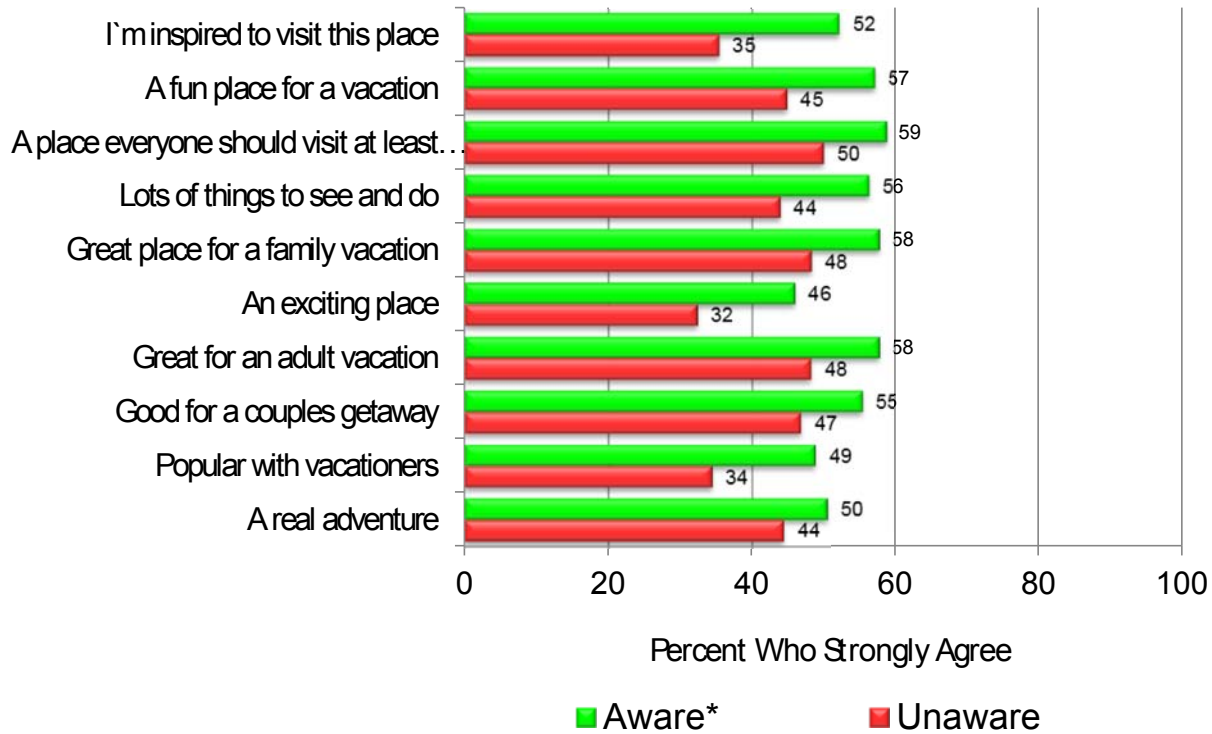


\*Saw at least one ad

# Impact of Advertising on Oregon's Hot Buttons



Base: Residents of Oregon's Regional Advertising Markets



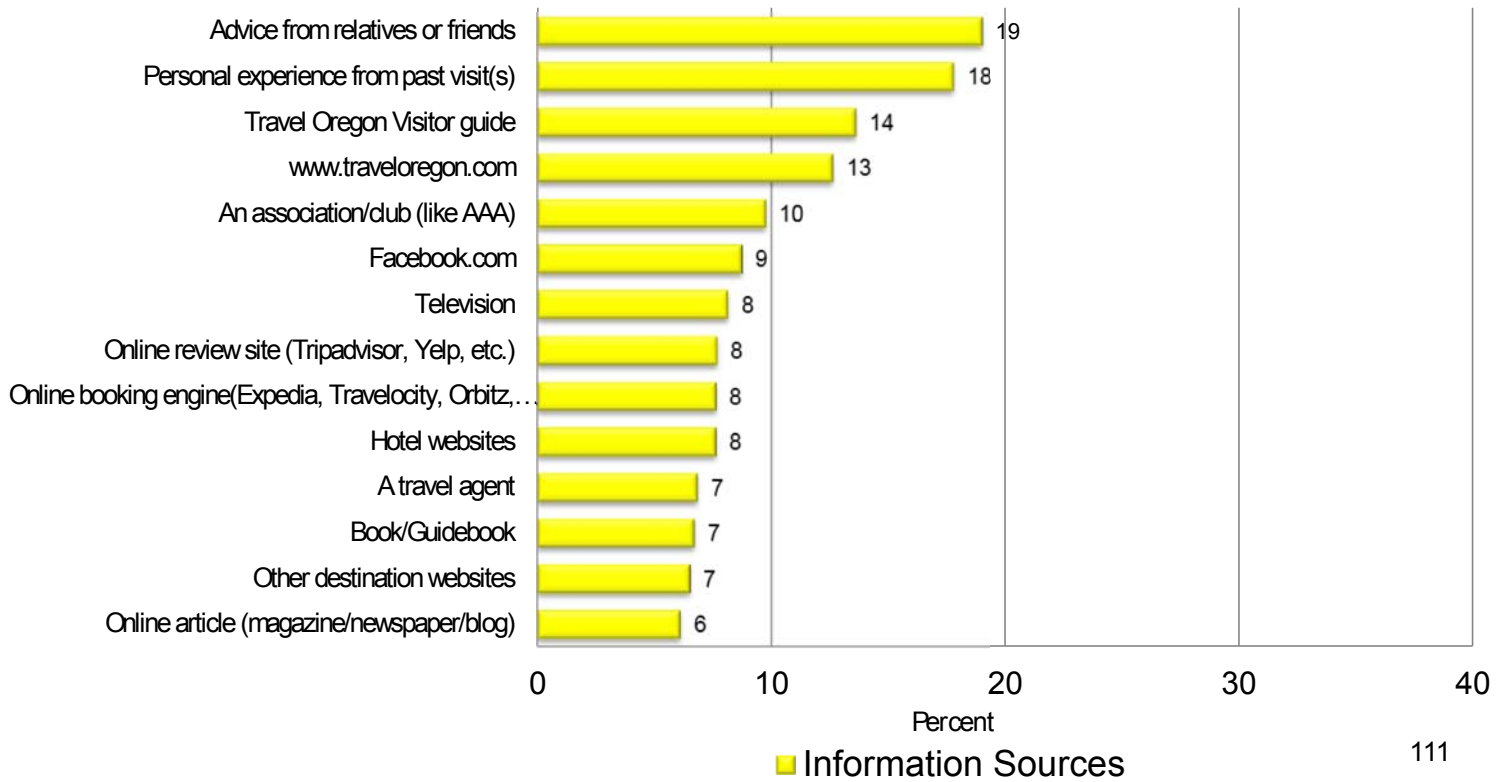
\*Saw at least one ad

# Information Sources for Trip Planning

# Information Sources Used for Trip Planning After Seeing Ads



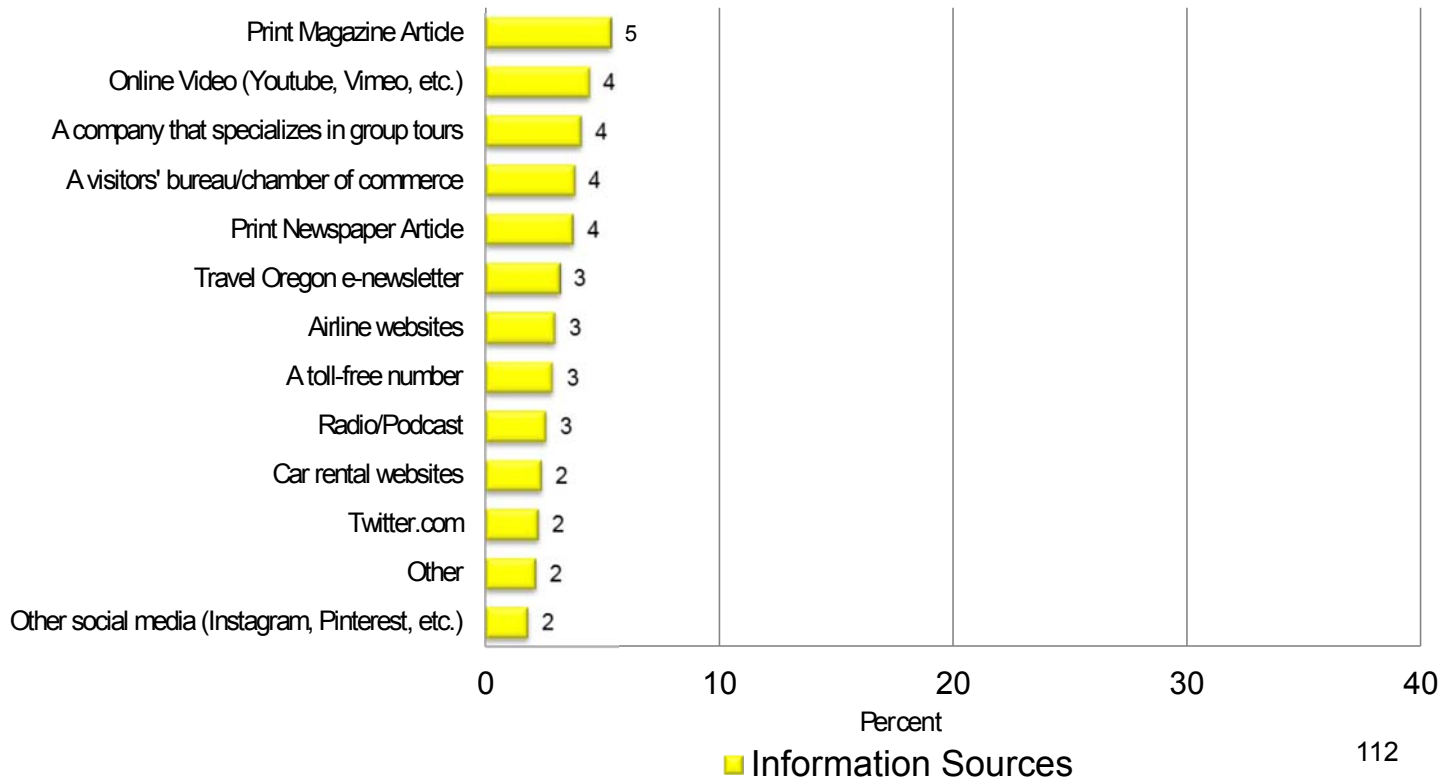
Base: Regional Market



# Information Sources Used for Trip Planning After Seeing Ads (cont'd)



Base: Regional Market





# Bottom Line Advertising Impacts

# Research Method



- ◉ **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 experimental design, we control for the effects of internal and external factors that could otherwise influence the result.*

# Advertising Impacts



- ⦿ The campaign generated 1.8 million incremental trips that would not otherwise have taken place, which brought \$425.4 million in incremental visitor spending and \$19 million in state and local taxes.
- ⦿ 1.1 million incremental trips were overnight trips and 0.7 million were day trips.
- ⦿ Every \$1 invested in the Oregon ad campaign in the evaluated markets generated \$237 in visitor spending and \$11 in tax revenue for the benefit of Oregon residents.

# Oregon Campaign Efficiency



Regional Travel Market: Oregon, Idaho, Washington, California and Vancouver, B.C.

Ad Investment	\$1.8 Million
Incremental Trips	1.81 Million
Incremental Visitor Spending	\$425.4 Million
Incremental Taxes	\$19.0 Million

- Ad Investment excludes Production/Other Costs
- Visitor spending based on Longwoods' Travel USA Avg. Per-Person Per-Trip Expenditures = \$300.72 for overnight visitors; \$138.26 for day visitors
- Effective Direct Tax rates 2.76% *State* and 1.7% *Local*

# Incremental Trips Due to Advertising



Overnight Trips	1,082,000
Day Trips	723,500
Total	1,805,500

# The Bottom Line



**Every \$1 invested in the campaign generated  
\$237 in visitor spending  
\$11 in local/state taxes**

Spending ROI	\$237
Tax ROI	\$11