

CENTRAL OREGON
VISITORS ASSOCIATION



VISIT CENTRAL OREGON
ADVENTURE CALLS

DESTINATION BRAND RESEARCH

FOCUS GROUPS IN KEY MARKETS
REPORT OF FINDINGS

February 2020

Destination  Analysts

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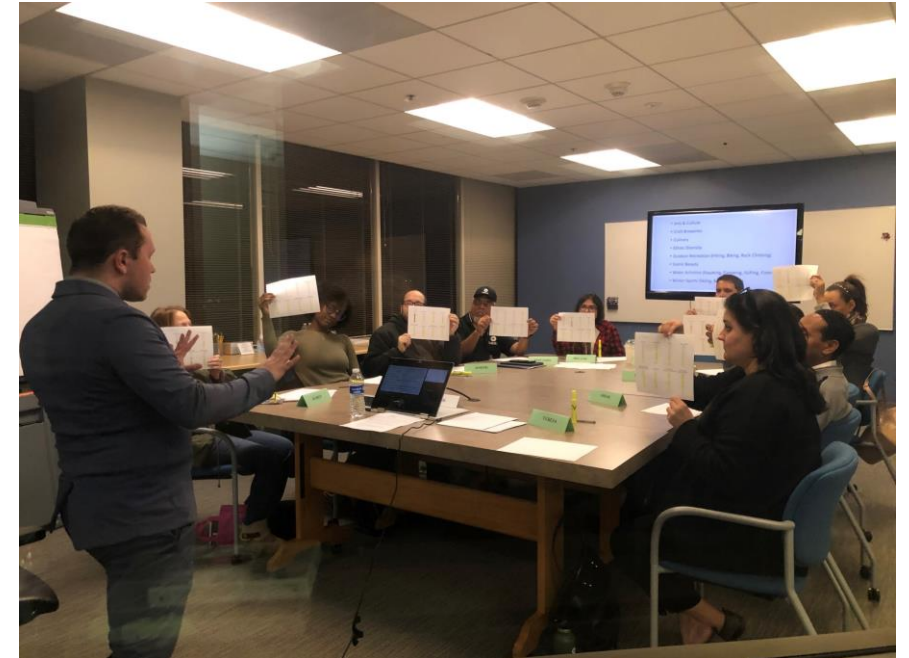
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RESEARCH OVERVIEW & OBJECTIVES

This report presents the findings of a focus group-based research project conducted by Destination Analysts on behalf of the Central Oregon Visitors Association. Focus groups were conducted between February 3 – 6, 2020 in San Francisco, CA; Los Angeles, CA; Phoenix, AZ and Seattle, WA.

Part of a larger comprehensive destination brand research study, the primary objectives of the focus groups were to:

- Examine leisure travelers' current perceptions of Central Oregon as a place to visit and the attractions, activities and experiences offered in the destination
- Understand the attractions, experiences and attributes that would most motivate a leisure trip to Central Oregon
- Test creative and messaging concepts to determine which would be most successful in influencing travel to Central Oregon
- Identify any differences in perceptions amongst the four markets studied



Above: Image of the focus group environment in Los Angeles.

METHODOLOGY

Eight (8) in-person focus groups took place between February 3 – 6, 2020. Each focus group consisted of ten (10) leisure travelers and lasted 2 hours. Focus groups in all four markets were recruited via the focus group facility and one group in each market consisted of past visitors to Central Oregon and the other group consisted of non-visitors—those who have never visited Central Oregon.

Session details are as follows:

- San Francisco, CA Session 1: Monday, February 3rd at 6:00pm PT
- San Francisco, CA Session 2: Monday, February 3rd at 8:00pm PT
- Los Angeles, CA Session 1: Tuesday, February 4th at 6:00pm PT
- Los Angeles, CA Session 2: Tuesday, February 4th at 8:00pm PT
- Phoenix, AZ Session 1: Wednesday, February 5th at 6:00pm PT
- Phoenix, AZ Session 2: Wednesday, February 5th at 8:00pm PT
- Seattle, WA Session 1: Thursday, February 6th at 6:00pm PT
- Seattle, WA Session 2: Thursday, February 6th at 8:00pm PT

Leisure Traveler Participant Requirements:

- Not employed in advertising, market research and travel/hospitality industries
- Took one or more overnight leisure trips in the past year
- Expressed a strong level of interest in visiting Central Oregon for leisure (interest level of 8, 9 or 10 on a 10-point scale)
- Mix of male and female
- Mix of Millennials, Gen Xers and Baby Boomers
- Mix of married/partnered, single and those with children under 18 in their household
- Had a minimum annual household income of \$50,000
- Were mostly college graduates

A scenic landscape photograph of a large, calm blue lake, likely Crater Lake, during a sunset or sunrise. The sky is a mix of soft orange, pink, and light blue. In the foreground, a dark evergreen tree is partially visible on the left. The lake's surface reflects the sky's colors. In the middle ground, a small, forested island is visible. The background features steep, rocky mountains with some sparse vegetation. The overall mood is peaceful and majestic.

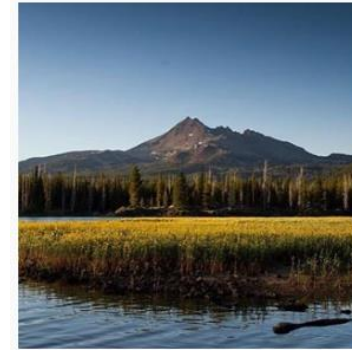
EXECUTIVE SUMMARY

THE CENTRAL OREGON DESTINATION BRAND

- **Top-of-mind associations with the brand centered around the region's natural assets.** When asked to think specifically about the Central Oregon region and what associations first came to mind, responses largely related to the area's nature-rich offerings; pine trees, mountains, forests and outdoor activities. Noticeably lacking from the associations cited were specific attractions, sites and cities within the region. This was true from all focus group participants, regardless of past visitation to the region. Associations were more general, suggesting a lower level of familiarity with the brand, even amongst past visitors.
- **While thought of as strong for outdoor recreation, scenic beauty and water activities, Central Oregon was widely considered to be lacking in ethnic diversity and arts and cultural offerings.** Additionally, although craft breweries and winter sports are a big part of the Central Oregon brand, this was not a universal perception across focus group participants. The region's culinary scene also had inconsistent ratings. While some rated Central Oregon highly for this attribute, most others were moderate in their rating, suggesting that culinary is not seen as a major pillar of the brand.
- **While a range of emotions were cited as reasons for travel—excitement, relaxation, etc.—the core emotional motivation for nearly all focus group participants was escape.** When asked (in an open-ended question) what motivated focus group participants to travel, most responses boiled down to “escape from their daily routine” and for many, a desire to be exposed to different experiences. In fact, when asked to focus on specific emotional travel motivators, participants most often rated “explore something new” as most important. Later in the competitive set exercise, Central Oregon was identified as one of the best destinations for this specific attribute—highlighting a major opportunity for the destination to position itself as a place for new experiences.

THE CENTRAL OREGON DESTINATION BRAND (continued)

- **Lack of buzz and lack of knowledge of Central Oregon are the primary reasons that travelers have not yet visited the region.** When asked why focus group participants have yet to visit Central Oregon, the most commonly cited responses were along the lines of “I never hear about it” and that they “don’t know anything about it.” Central Oregon simply is not on their radar because they don’t hear about it from friends and family, which is the most important, most trusted and most frequently used travel inspiration resource for American leisure travelers
- **Central Oregon is largely perceived as a place that elicits positive feelings around being relaxed, creative and connected.** Both past visitors and non-visitors were asked how they felt or would feel while in Central Oregon. The overwhelming majority of past visitors and non-visitors cited “relaxed,” “peaceful,” and “creative.” Those who felt “connected” (or who anticipated feeling connected) were connected to nature, themselves and/or their travel companions. Additionally, some said they would feel “disconnected” and “unplugged” from the digital world, allowing them to experience a slower pace compared to their daily life.



CENTRAL OREGON'S COMPETITIVE SITUATION

- **Central Oregon is not top-of-mind as a leisure destination in the Pacific Northwest.** When asked which destinations within the Pacific Northwest region they would most like to visit, bigger cities such as Seattle and Portland were cited most, in addition to the San Juan Islands, the coasts and Oregon wine country. This was true of both past visitors and non-visitors to Central Oregon, although a few from the latter group did cite Bend specifically as a place they would like to visit for leisure.
- **Central Oregon is viewed as a competitive destination for appreciating life, connecting with nature, challenging oneself, exploring something new, quality time with others, relaxation and self-care.** However, other Oregon destinations (the Oregon Coast and Crater Lake) and Lake Tahoe were also commonly viewed as being strong for these attributes as well—highlighting a need to differentiate Central Oregon from its in-state competitors and Tahoe. The attributes Central Oregon was considered weakest for were “being in an exciting atmosphere” and “bragging rights”; Seattle and San Francisco were considered best for these.



MOTIVATING TRAVEL TO CENTRAL OREGON


- **The activities considered most motivational for inspiring a trip to Central Oregon fell into two categories: Unique urban experiences and accessible outdoor experiences.** The urban experiences participants were most interested in were tax free shopping, culinary experiences and craft breweries and the accessible outdoor experiences of most interest were hiking, horseback riding, kayaking/SUPing and photography.
- **Of the images tested, image I, G, L and F (shown below) were considered most motivational to inspiring visitation to Central Oregon.** These images evoked a sense of calm and relaxation for participants, which they found extremely appealing.



- **Financial situations, costs and lack of time are the most common deterrents to general leisure travel.** Related to limited time off, several participants reported being too busy at work or having inflexible schedules. When it comes to marketing the Central Oregon region as a leisure destination, it may be worthwhile to highlight the value of a Central Oregon trip (such as any travel promotions or deals) and the fact that people can have a fulfilling visitor experience in a short amount of time.

KEY DIFFERENCES BY MARKET

- **Los Angeles and Phoenix** were the most likely markets to feel that **Central Oregon was difficult to travel to**. They were also the likeliest to comment that they had access to similar outdoor recreation that is in closer proximity to them than Central Oregon. Highlighting unique Central Oregon experiences that they are unable to replicate nearby could increase their consideration of the region for a future leisure trip.
- **Across nearly all markets, participants most commonly rated “explore something new” as being very important to why they travel.** The exception to this was the Phoenix group, who were more likely to say “appreciate life” was most important to them. Additionally, exciting atmosphere was rated highly (but secondary to “explore something new”) most often for the **Los Angeles** and **San Francisco** markets.
- **Motivational activities for taking a Central Oregon trip differed by market.** **San Francisco** group participants showed the relatively highest interest in the urban experiences compared to the other markets. **Los Angeles** specifically discussed the appeal of Oregon’s craft breweries and wine regions as highly motivational. **Phoenix** group participants were generally more interested in the water activities and outdoor experiences that involve greenery and nature and less interested in western themed towns and other urban experiences. **Seattle** expressed interest in most of the activities with the caveat that they would want to focus on “*experiences you can’t do around Seattle,*” noting that many of the activities are common to Washington as well.
- When asked what they “would explore” on a trip to Central Oregon, each focus group commonly listed water (rivers or lakes) as well as nature (mountains or forests). **The Los Angeles and San Francisco groups also responded with snow and winter activities, while the Phoenix and Seattle groups primarily focused on “just being outdoors” and warm-weather activities.**



DETAILED RESEARCH FINDINGS

A scenic landscape photograph of a calm lake surrounded by a dense forest of tall evergreen trees. In the background, a snow-capped mountain peak rises above the treeline under a sky with soft, wispy clouds. In the lower-left foreground, two hikers are seen from behind, standing on a grassy bank near a large log. One hiker is wearing a blue cap, a blue long-sleeved shirt, and a large green and brown backpack. The other hiker is wearing a light grey t-shirt, blue jeans, and a blue cap. The overall atmosphere is peaceful and natural.

THE CENTRAL OREGON DESTINATION BRAND

FAMILIARITY AND ASSOCIATIONS WITH CENTRAL OREGON

Central Oregon is not top-of-mind as a leisure destination in the Pacific Northwest which suggests that familiarity and awareness of the brand is low.

When asked which destinations within the Pacific Northwest region they would most like to visit, bigger cities such as Seattle and Portland were cited most, in addition to the San Juan Islands, the coasts and Oregon wine country. This was true of both non-visitors and past visitors to Central Oregon, although a few from the latter group did cite Bend specifically as a place they would like to visit for leisure.

Top-of-mind associations with the brand centered around the region's natural assets.

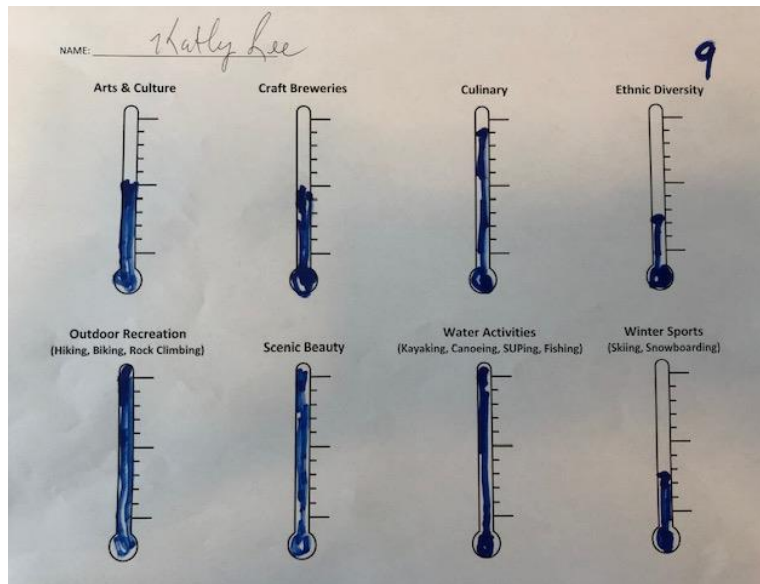
When asked to think specifically about the Central Oregon region and what associations first came to mind, regardless of past visitation to the area, responses largely related to the area's nature-rich offerings; pine trees, mountains, forests and outdoor activities. While a few mentioned craft beer as an association with the region, past visitors from California specifically associate Central Oregon with wine—likely conflating it with the Willamette Valley. What is noticeably lacking from the associations cited were specific attractions, sites and cities within the region. This was true from all focus group participants, regardless of past visitation to the region. Associations were more general, suggesting a lower level of familiarity with the brand, even amongst past visitors.

Top-of-mind Associations with Central Oregon

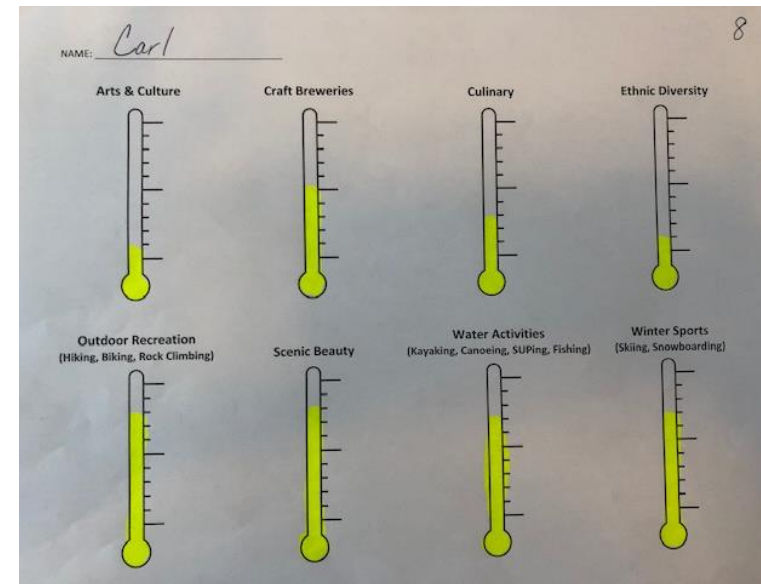


CENTRAL OREGON ATTRIBUTE RATINGS

While thought of as strong for outdoor recreation, scenic beauty and water activities, Central Oregon was widely considered to be lacking in ethnic diversity and arts and cultural offerings. These perceptions were similar across all markets studied and by past visitation to the area. Additionally, although craft breweries and winter sports are a big part of the Central Oregon brand, this was not a universal perception across focus group participants. Some past visitors and non-visitors alike, had no knowledge of the region's winter sports offerings or craft brewery scene and therefore rated the destination lower for these attributes. The region's culinary scene also had inconsistent ratings. While some rated Central Oregon highly for this attribute most others were moderate, suggesting that culinary is not seen as a major pillar of the brand.



Past Visitor



Non-Visitor



The best person to visit Central Oregon is _____.

Outdoor adventurers are considered to be the best type of traveler suited for a Central Oregon visitor experience. During the lightning round towards the end of the focus group sessions, participants were presented with a set of fill-in-the-blank statements and were prompted to share the one thing that first comes to mind. For the statement, *“The best person to visit Central Oregon is _____,”* “outdoor adventurers” was, by and large, the most common response. Other similar responses that fall within this traveler type included “nature lovers,” “fishers,” “explorers” and “people who are active.” Reflective of how past visitors perceive the Central Oregon brand and how well they align with it, several participants who had previously traveled to the region considered themselves to be the best person to visit, citing “me,” “you,” “us” and “everyone” as top-of-mind responses to the statement.

PERCEPTIONS OF CENTRAL OREGON’S RESIDENTS

Focus group participants’ perceptions of Central Oregon locals were mostly positive.

When asked what one word or phrase best described the people who live in Central Oregon both past visitors and non-visitors described them in positive terms: “outdoorsy”, “friendly,” “inviting,” “happy” and “healthy” to name a few. Interestingly, although both groups gave Central Oregon relatively low ratings for ethnic diversity (see page 14), only the non-visitor group used “white” to describe the region’s locals. However, a few past visitors also cited negative terms such as “cold” and “brutal” to describe residents. When asked to elaborate on their response, one focus group participant, an LGBTQ woman of color, stated *“I didn’t feel safe at night. I saw way too many confederate flags on bumper stickers.”* However, this was not a common experience that other past visitors have had in the region. Locals were most often described as being nice and welcoming to the focus group participants who visited previously.

“Central Oregon’s locals are nicer than Seattle locals.” – Focus Group Participant
“They are some of the nicest people I have ever met.” – Focus Group Participant

Descriptions of Central Oregon’s Residents



DETERRENTS TO VISITING CENTRAL OREGON



Lack of buzz and lack of knowledge of Central Oregon are the primary reasons that travelers have not yet visited the region. When asked why focus group participants have yet to visit Central Oregon, the most commonly cited responses were along the lines of “I never hear about it” and that they “don’t know anything about it.” Central Oregon simply is not on their radar because they don’t hear about it from friends and family, which is the most important, most trusted and most frequently used travel inspiration resource for American leisure travelers (from Destination Analysts *The State of the American Traveler*). Particularly for the Phoenix and Los Angeles markets, Central Oregon was considered “too far” for a road trip and not quite worth a plane trip. Educating leisure travelers about what Central Oregon uniquely offers visitors is key to increasing awareness of and familiarity with the destination, boosting appeal and ultimately getting travelers to consider Central Oregon.

“It probably has a great reputation regionally, but not nationally.” – Focus Group Participant

WHAT TRAVELERS NEED TO KNOW ABOUT CENTRAL OREGON

Accessibility both to and within Central Oregon, as well as geography, are major topics of education for leisure travelers who are unfamiliar with the destination. Those who have not yet visited Central Oregon were asked to share what they would need to learn in order to inspire them to consider Central Oregon for a leisure trip. In general, this audience wanted to know how to get to Central Oregon and how to travel within the destination once they arrived. Common perceptions were that Central Oregon is hard to get to and attractions within are far apart. There were also questions around the boundaries of Central Oregon, what designates Central Oregon and what “Central Oregon” means.

“Are attractions 10 miles apart or 150 miles apart?” – Focus Group Participant

“This is such a nebulous idea. I don’t know where it is and not sure how far apart any of these activities are.” – Focus Group Participant



EMOTIONAL EFFECT OF VISITING CENTRAL OREGON

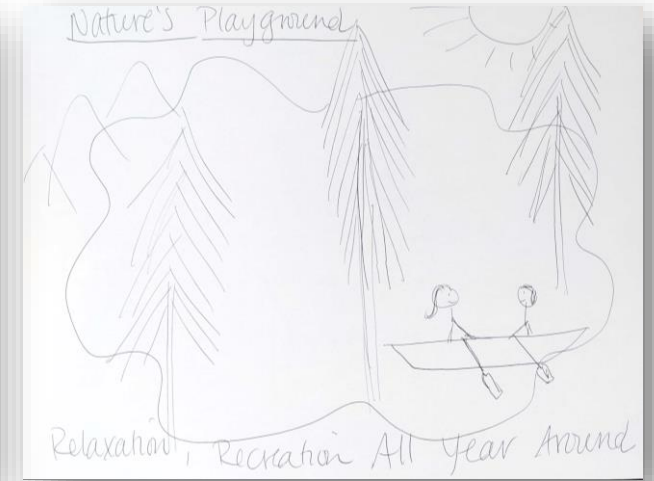


Central Oregon is largely perceived as a place that elicits positive feelings around being relaxed, creative and connected. Both past visitors and non-visitors were asked how they felt or would feel while in Central Oregon. The overwhelming majority of past visitors and non-visitors cited “relaxed,” “peaceful,” and “creative.” Those who felt “connected” (or who anticipated feeling connected) were connected to nature, themselves and/or their travel companions. Additionally, some said they would feel “disconnected” and “unplugged” from the digital world, allowing them to experience a slower pace compared to their daily life.

CENTRAL OREGON AS A WORK OF ART

These positive feelings were also reflected in the art piece exercise, in which participants imagined that people who interacted with their Central Oregon art piece would feel “calm,” “open,” “excited” and “connected.” Focus participants were prompted to imagine that they were an artist tasked with creating an art piece that represents Central Oregon. Regardless of the medium - whether a painting, collage or sculpture - all art pieces depicted Central Oregon’s natural beauty and assets. They described their art piece as having mountains, rivers, greenery and wildlife. Some pieces also reflected the winter season with snow-capped mountains and winter recreational activities. In addition to the ubiquitous representation of nature, participants unanimously reported that their Central Oregon art piece would elicit positive feelings. In addition to “calm,” “open,” “excited” and “connected,” other feelings were:

- Happy
- Interested
- Relaxed
- Wonder

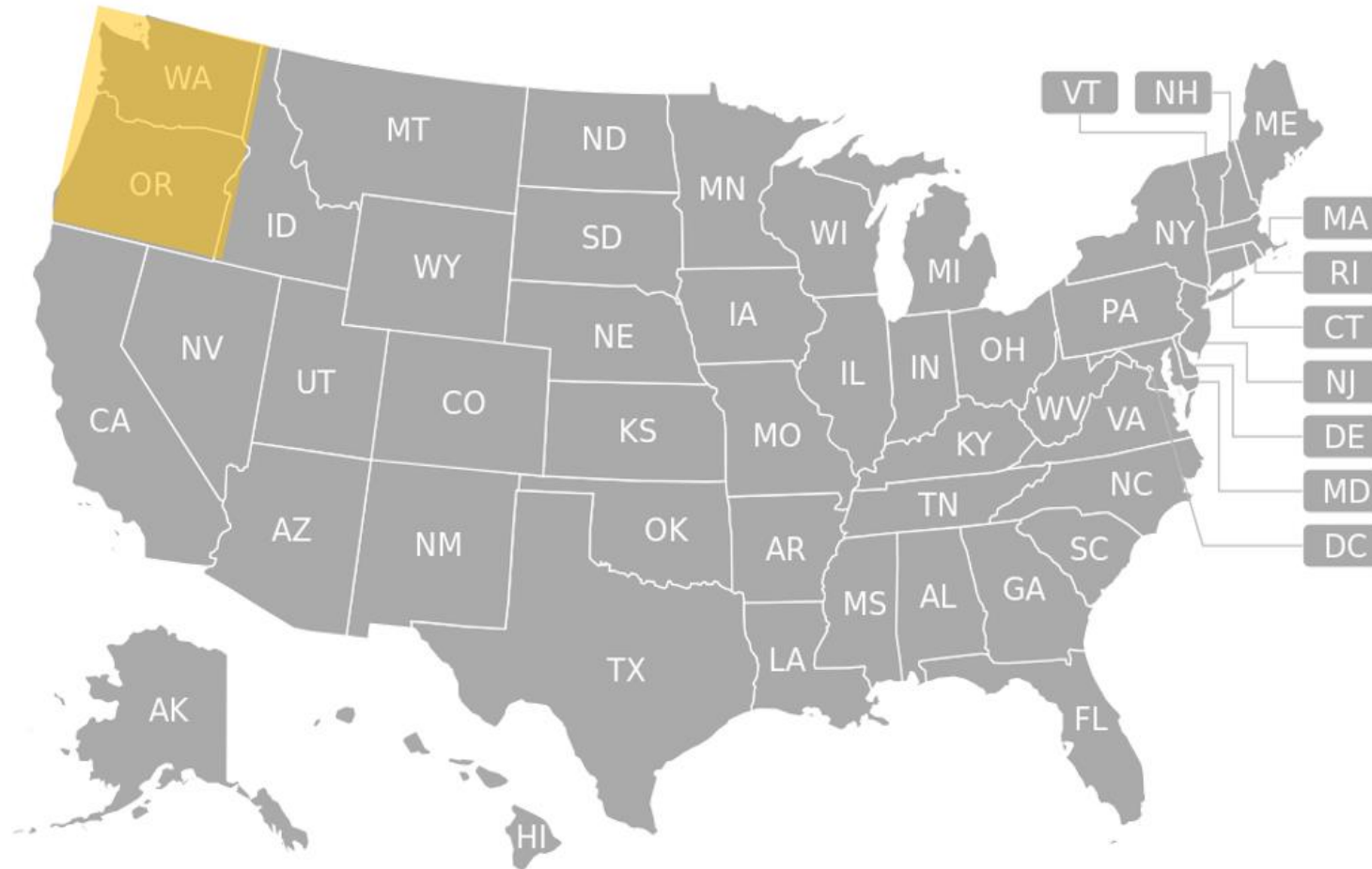


A scenic view of a park at sunset. In the foreground, there is a large, green, grassy area with a winding path. To the right, a calm lake reflects the colorful sky. In the background, there are several buildings, including a large one with a blue roof, and a dense forest of evergreen trees. The sky is a mix of orange, yellow, and blue, indicating the time is either sunrise or sunset. The overall atmosphere is peaceful and scenic.

CENTRAL OREGON'S COMPETITIVE SITUATION

COMPETITION

Focus Group participants were shown a map of the United States highlighting the Pacific Northwest destinations of Oregon and Washington and asked where they would most want to visit and why.



TOP-OF-MIND LEISURE DESTINATIONS IN THE PACIFIC NORTHWEST

Seattle, Portland and the Oregon Coast were commonly mentioned as **Pacific Northwest destinations** focus group participants would be interested in going to. Other destinations of interest were Oregon's Wine Country, Bend, Leavenworth, Crater Lake and the San Juan Islands. Key motivations and interest to visit these locations was based on their level of familiarity with these destinations. Messaging to travelers about how the Central Oregon experience differs and is superior to these competitors could increase travelers' consideration of the region.

Eastern Washington & Eastern Oregon were noted as the **least appealing destinations in the Pacific Northwest**. Focus group participants were then asked to share destinations they would NOT want to visit. "Rural," "boring," "agricultural-based," "dry" and "culturally and politically biased residents" were top phrases used to describe these destinations. Additionally, a few focus group participants shared they didn't have interest in traveling to the Pacific Northwest during the winter season.



CENTRAL OREGON VS. COMPETITIVE SET

Focus group participants were then asked to rate these destinations against Central Oregon/Bend by completing the following worksheet to denote which destination was strongest and weakest for each of the emotional travel motivators tested:

NAME: _____

STRONGEST = ✓ WEAKEST = X

	Central Oregon/Bend	Crater Lake	Lake Tahoe	Oregon Coast	San Francisco	Seattle
Appreciate life 6				✓	X	
Being in an exciting ambiance/atmosphere 3		X			✓	
Bragging rights 4	X				✓	
Connect with nature 9			✓		X	
Challenge myself 9	✓					X
Explore something new 8		✓				X
Quality time with others 1				✓	X	
Relaxation & rejuvenation 5				✓	X	
Self-care 5			✓			X

NAME: Jessie

STRONGEST = ✓ WEAKEST = X

	Central Oregon/Bend	Crater Lake	Lake Tahoe	Oregon Coast	San Francisco	Seattle
Appreciate life	7	X	✓			
Being in an exciting ambiance/atmosphere	2			X	✓	
Bragging rights	2			X		✓
Connect with nature	✓ 10					X
Challenge myself	5		✓			X
Explore something new	10	✓			X	
Quality time with others	5	X			✓	
Relaxation & rejuvenation	5	X	✓			
Self-care	5			✓		X

CENTRAL OREGON VS. COMPETITIVE SET (continued)

Central Oregon is viewed as a competitive destination for **appreciating life, connecting with nature, challenging myself, exploring something new, quality time with others, relaxation and self-care**. However, other Oregon destinations (the Oregon Coast and Crater Lake) and Lake Tahoe were also commonly viewed as being strong for these attributes as well—highlighting a need to differentiate Central Oregon from its in-state competitors and Tahoe. The attributes Central Oregon was considered weakest for were “being in an exciting atmosphere” and “bragging rights”; Seattle and San Francisco were considered best for these.

Results of the Strongest/Weakest Destination Exercise:

- **“Appreciate life”** is strongest for Oregon Coast, Tahoe & Central Oregon and weakest for San Francisco.
- **“Being in an exciting ambiance/atmosphere”** is strongest for San Francisco & Seattle and weakest for Crater Lake, Lake Tahoe & Oregon Coast.
- **“Bragging rights”** is strongest for San Francisco, Seattle & Lake Tahoe and weakest for Crater Lake and Central Oregon.
- **“Connect with nature”** is strongest for Oregon Coast, Central Oregon & Lake Tahoe and weakest for San Francisco & Seattle.
- **“Challenge myself”** is strongest for Oregon Coast, Central Oregon & Crater Lake and weakest for San Francisco & Seattle.
- **“Explore something new”** is strongest for Oregon Coast, Central Oregon & Crater Lake and weakest for San Francisco.
- **“Quality time with others”** is strongest for Oregon Coast, Central Oregon & Lake Tahoe and weakest for San Francisco & Seattle.
- **“Relaxation & Rejuvenation”** is strongest for Oregon Coast, Central Oregon & Lake Tahoe and weakest for San Francisco & Seattle.
- **“Self-care”** is strongest for Oregon Coast & Central Oregon and weakest for San Francisco.

CENTRAL OREGON AND EMOTIONAL TRAVEL MOTIVATOR RATING

NAME: Wendy

STRONGEST = ✓ WEAKEST = X

	Central Oregon/ Bend	Crater Lake	Lake Tahoe	Oregon Coast	San Francisco	Seattle
Appreciate life	9 1/2 or 10			✓		X
Being in an exciting ambiance/atmosphere	7 1/2	X			✓	
Bragging rights	8	X	✓			
Connect with nature	10 ✓					X
Challenge myself	10 ✓					X
Explore something new	10 ✓		X			
Quality time with others	10 ✓					X
Relaxation & rejuvenation	10			✓	X	
Self-care	10			✓		X

When evaluated separately from its competitive set, Central Oregon was rated strongest for “Connect with nature,” “Challenge myself,” “Explore something new,” “Relaxation & Rejuvenation” and “Self-care” attributes.

“Central Oregon would be the perfect place to go to disconnect and connect with nature.” – Focus Group Participant

However, Central Oregon was rated weakest for “Being in an exciting ambiance/atmosphere” and “Bragging rights”

“I don’t consider Central Oregon as a destination with bragging rights because I haven’t heard anyone talk about it.” – Focus Group Participant

A scenic view of a calm lake with kayakers and a snow-capped mountain in the background. The water is still, reflecting the sky and the surrounding forest. Three kayakers are visible: one in the foreground on a red and yellow kayak, and two others further back on green and yellow kayaks. The background features a dense forest of evergreen trees and a large, snow-capped mountain under a blue sky with scattered clouds. A small rainbow is visible in the upper right corner of the image.

MOTIVATING TRAVEL TO CENTRAL OREGON

GENERAL EMOTIONAL TRAVEL MOTIVATORS

While a range of emotions were cited as reasons for travel—excitement, relaxation, etc.—the core emotional motivation for nearly all focus group participants was **escape**. When asked (in an open-ended fashion) what motivated focus group participants to travel, most responses boiled down to “escape from their daily routine” and for many, a desire to be exposed to different experiences. When asked to focus on nine specific travel motivators—appreciate life, being in an exciting atmosphere, bragging rights, connect with nature, challenge myself, explore something new, quality time with others, relaxation and self-care—a similar story emerges. Across nearly all markets, participants most commonly rated “**explore something new**” as being very important to why they travel. The exception to this was the Phoenix group, who were more likely to say “appreciate life” was most important to them. Additionally, exciting atmosphere was rated highly (but secondary to explore something new) most often for the Los Angeles and San Francisco markets. Of the travel motivators tested, “bragging rights” was unanimously voted as least important.

Emotional Travel Motivators Rating Exercise

NAME: Kathleen

Motivator	1	2	3	4	5	6	7	8	9	10
Appreciate life	Very unimportant									Very important
Being in an exciting atmosphere	Very unimportant									Very important
Bragging rights	Very unimportant									Very important
Connect with nature	Very unimportant									Very important
Challenge myself	Very unimportant									Very important
Explore something new	Very unimportant									Very important
Quality time with others	Very unimportant									Very important
Relaxation & rejuvenation	Very unimportant									Very important
Self-care	Very unimportant									Very important

MOTIVATING ACTIVITIES



Above: Activities word-cloud tested in the focus groups

Many potential travelers to Central Oregon will decide whether they want to visit the region based on what they can do on a trip. Focus group participants were shown a list of activities and asked to select those that made them most want to visit Central Oregon. Understanding which specific activities in Central Oregon are most motivating will help to determine which activities are strong at the brand level as well as provide guidance on which should be highlighted in future marketing materials.

Although most activities were called out by at least a few focus group participants as motivational, some activities were more consistently mentioned. The activities that rose to the top as most motivational fell into two categories:

Unique urban experiences:

- Tax free shopping
- Culinary experiences
- Craft breweries

Approachable/Accessible outdoor activities:

(that take advantage of Central Oregon's unique landscape)

- Hiking
- Horseback riding
- Kayaking/SUPing
- Photography

MOTIVATING ACTIVITIES (continued)

Activities that seemed appealing, but were more of a stretch for the Central Oregon brand:

- Staying in a resort – *“Kind of defeats the purpose of a Central Oregon trip: exploring and connecting with nature.”*
- Museums and art galleries – *“Not what I expect to find in Central Oregon.”*
- Events and concerts – *“Do they get big names to play?”*

Activities that appeared appealing, but to smaller or niche audiences:

- Golf
- Fishing
- Snowmobiling/ATV rides
- Snowshoeing (interestingly, most winter activities were treated like a niche or alternative experience and not part of the core trip idea)
- Western themed towns
- Rock Climbing
- Mountain Biking



Above: Activities word-cloud tested in the focus groups

MOTIVATING ACTIVITIES—DIFFERENCES BY MARKET



Some differences were noticed by market:

San Francisco group participants showed the relatively highest interest in the urban experiences compared to the other markets.

“I didn’t know they don’t have sales tax there!”

Los Angeles group participants specifically discussed the appeal of Oregon’s craft breweries and wine regions as highly motivational.

“I’m interested in Oregon secrets that most don’t know about.”

Phoenix group participants were generally more interested in the water activities and outdoor experiences that involve greenery and nature and less interested in western themed towns and other urban experiences.

“We have those here.”

“I would want to go in the summer, specifically to escape our heat.”

Seattle group participants expressed interest in most of the activities with the caveat that they would want to focus on *“experiences you can’t do around Seattle,”* noting that many of the activities are common to Washington as well.

DESIRED CENTRAL OREGON EXPERIENCES

If I were in Central Oregon,
I would explore _____.

The top desired experiences for a Central Oregon trip related to water and nature. Towards the end of each focus group, participants were asked a number of questions in a lightning round format—after being presented with a fill-in-the-blank statement they were asked to share the first thing that came to mind. The goal of this exercise was to assess the strongest associations with the brand. When asked what they “would explore” on a trip to Central Oregon, each focus group commonly listed water (rivers or lakes) as well as nature (mountains or forests). The Los Angeles and San Francisco groups also responded with snow and winter activities, while the Phoenix and Seattle groups primarily focused on “just being outdoors” and warm-weather activities.



MOTIVATIONAL IMAGERY

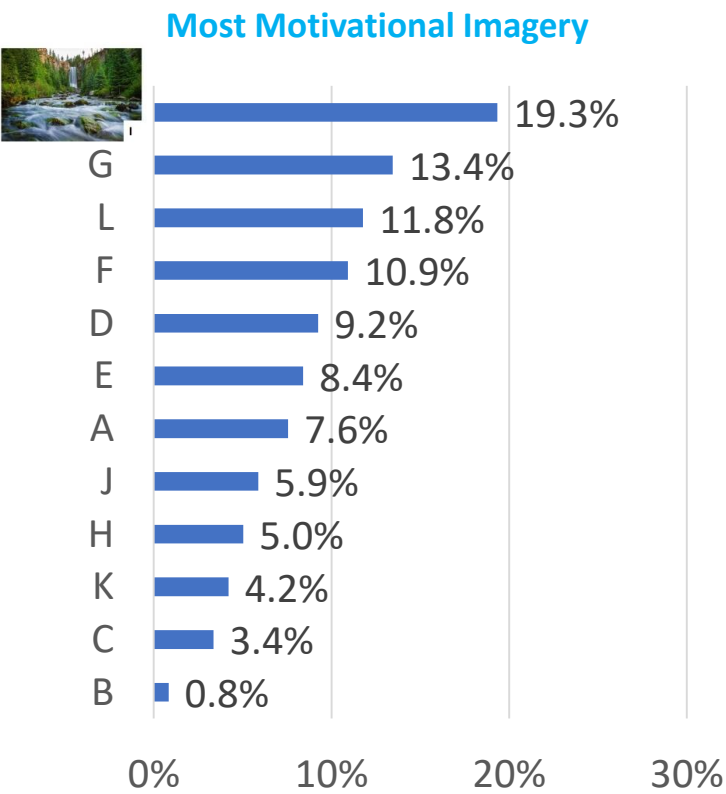
Focus group participants were shown each of the following images and asked to select those that made them most want to visit Central Oregon.



MOTIVATIONAL IMAGERY

Similar to the analysis of motivational activities, it is important to understand how images impact potential travelers. The focus groups sought to identify specific images that were most motivational, with the ultimate goal of learning what elements or attributes of those images most influenced interest in visiting Central Oregon.

Image I of the waterfall and flowing water over mossy rocks was identified as motivational most often amongst all tested images (by 19.2% of focus group participants). As with the activities, most of the images were selected by at least a few focus group participants as motivational, with some images being called out more often than others. Following image I, image G (panoramic of sunlight on mountains), image L (kayaking on still reflective water) and image F (Bend with outdoor concert or event) were all selected as personally motivating by at least one-tenth of all focus group participants.



MOTIVATIONAL IMAGERY

Looking deeper into why certain images were found to be motivational will assist in understanding what elements or attributes of those images most influenced interest in visiting Central Oregon. The emotions participants reported feeling from images that motivated them to want to visit Central Oregon fell into three categories:

Images that communicated Calm / Relaxing / Nature

- Image L – *“looks so calm and beautiful” “tranquil” “the clear still water is so magical”*
- Image G – *“Doesn’t look like anything around where I live” “feels open, like I won’t need to compete for space”*
- Image I – *“feels rejuvenating” “I’m a sucker for waterfalls”*
- Image F – the image of Bend with the outdoor concert/event was universally liked, but interestingly for its display of water rather than the event or urban elements, *“Water activities!” “I see the river first” “I love anything with water” “I’ve been there and Bend has everything a city should have and is right next to nature.” “this image seems to be the only non-nature one and it’s still nature”*



MOTIVATIONAL IMAGERY



Images that communicated Central Oregon as Approachable / Inviting

- Image J – *“the bicycle path seems safe and separated, like they prioritize bicycle safety”*
- Image E – *“that just looks warm and welcoming.” “feels like a cozy cabin, intimate and personal, not a big stuffy hotel” “quaint, quiet”*
- Image A – *“the horseback riding looks fun and easy to do” “looks romantic” “quality time”*
- Image K – *“family friendly” “glad to see activities for kids”*

Images that communicated Active / Adventure / Excitement

- Image D – *“that looks active and fun” “an adventure awaits”*
- Image H – *“I want to ride in one of those!” “that would be a unique experience”*

MOTIVATIONAL IMAGERY

Focus group participants also shared some other image concepts or themes they would find **motivational**. Images of food and culinary experiences were suggested more than once and in multiple markets. Additionally, images of the local people and small towns would make the destination feel more inhabited and approachable. *“A nice restaurant on a downtown main street or something with lights like an old movie theater.”*

“The nature is beautiful, I’m sold! But don’t just focus on the outdoors. I still haven’t seen how people live there. What’s the culture like?” – Focus Group Participant

Group participants also called out the lack of diversity in the images tested, explaining that more representation would significantly impact their interest in visiting.





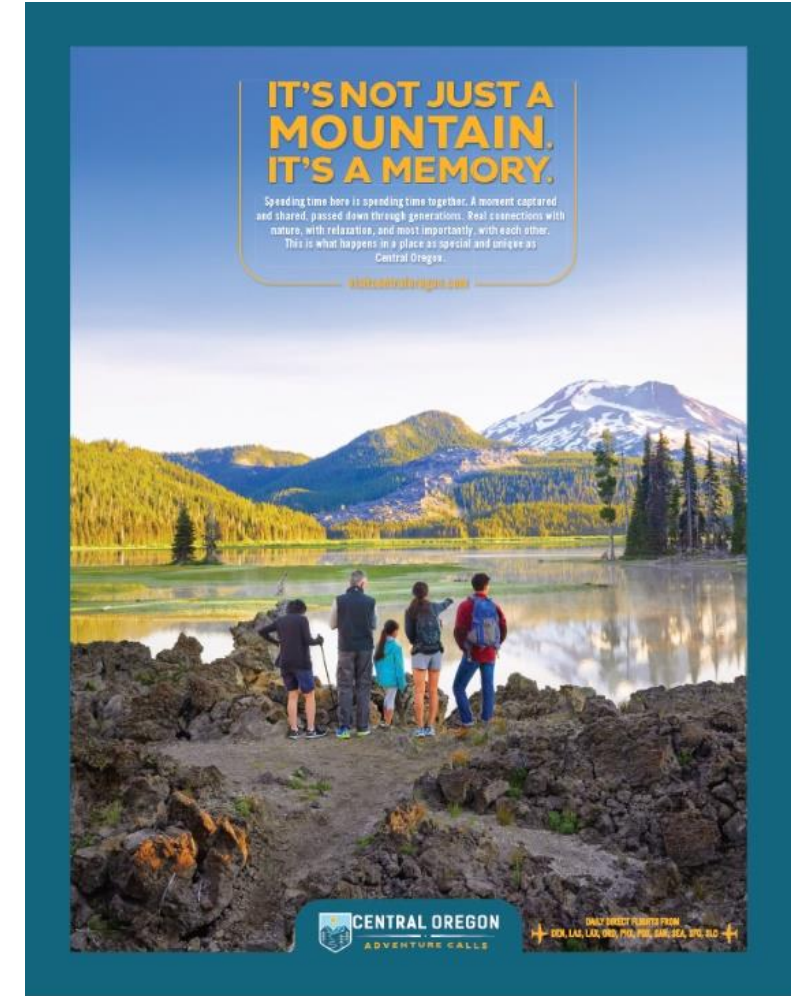
CREATIVE EVALUATION

PRINT ADVERTISEMENT

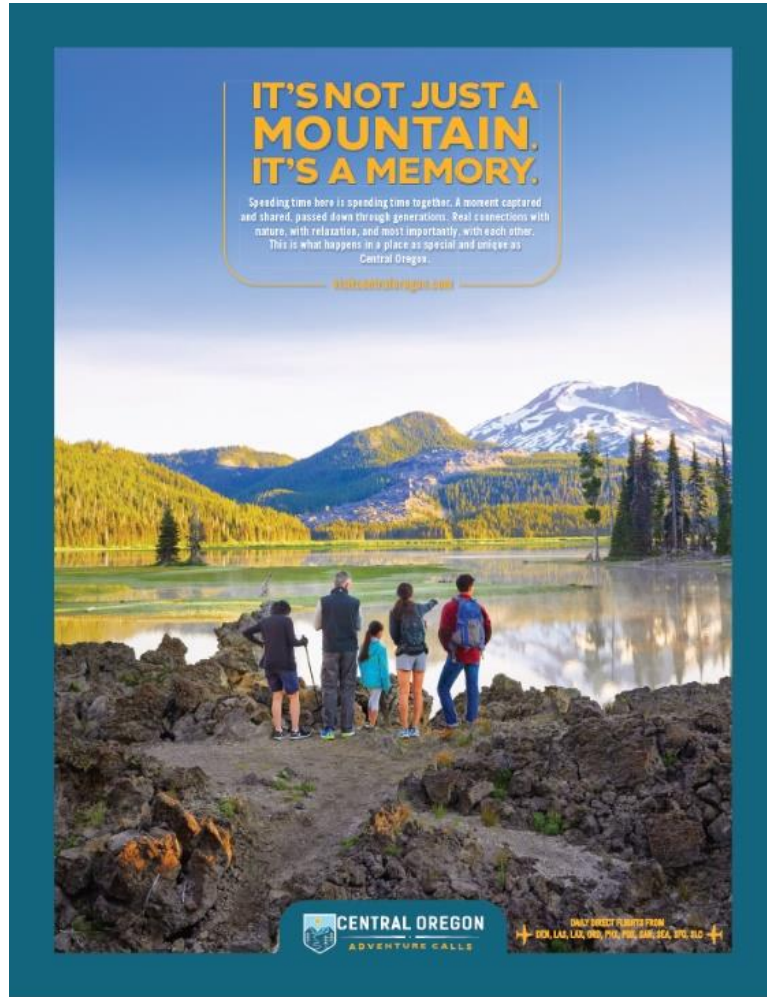
The “It’s Not Just a Mountain” print advertisement received mixed reviews from focus group participants. Some described it as un-crowded, family friendly and scenic. The tagline, “It’s not just a mountain. It’s a memory” received positive feedback and the list of direct flights at the bottom was perceived to be useful. Top of mind emotions/reactions from this ad include peaceful, fresh-air, serene, rugged, remote and recharging.

When reviewing the image, some participants appreciated the scenic lake and vista while others were more critical of the family subject and overall composition. *“This tells me that Central Oregon is for families or couples, not so much solo travelers or friends.”*

Older and single group participants were sensitive to the family ad and expressed, *“show me something that’s not just families.”* Participants who have a non-traditional family and participants who don’t have kids also shared similar feelings, *“this is not speaking to me.”*



PRINT ADVERTISEMENT



Some participants described the image as boring and bland comparing it to a *“passive vacation photo.”* For these participants, It did not elicit positive emotions that would inspire visitation. *“What is special about this? It looks like ‘just a mountain’ and the mom is not even looking at the mountain.”* Both Caucasian and non-Caucasian focus group participants commented on the lack of ethnic diversity of the family. *“Is Central Oregon only for white families?”*

Of all four markets, focus group participants in Phoenix had the most positive reaction to the print ad. Phoenix participants found the family-bonding subject of the ad appealing regardless of family status and described a trip where a family creates memories together as appealing. *“As we view, we’re almost part of the family, we’re standing behind them”*

BRAND VIDEO

Focus group participants were shown the brand video and asked a number of questions to assess emotional understanding and inspirational value.



BRAND VIDEO

First reactions to the brand video were largely positive. Participants appreciated the diversity of people as well as the diversity of activities and experiences featured. *“Glad to see there is more to do than just look at nature.”*

The most common emotions participants felt after watching the brand video were a sense of adventure, relaxation, inspiration, freedom, warmth, calm, peace. *“It’s an escape!” “makes me want to see this with my loved ones.”*

Examples of specific scenes or elements of the video that stood out in discussion:

- Sun shining on the rocks and mountains
- Rich green trees
- Bright white snow
- Piano playing on a cliff
- Many smiling faces

References to Native American culture in the video piqued interest among the groups.

Participants discussed how Native American culture experiences would be appealing on a trip to Central Oregon and asked if they were actually available in Central Oregon.



BRAND VIDEO

Participants openly discussed and shared how they would improve the video. Some described liking all of the activities and experiences featured but felt there wasn't enough specificity. ***"Give me the names of the hiking trails and native tribes and restaurants so I have some specific reason to visit."***

Some participants wanted to see more focus on unique experiences to Central Oregon. ***"We have a lot of those experiences within driving distance of here, I need to know why it's worth it me to travel so much further."***

Some participants also discussed the need for more focus on urban-centric activities. Although the outdoor adventure scenes elicited excitement from a majority of the groups, others wanted to see a more holistic Central Oregon experience that includes evening activities. ***"Aside from fishing and hiking I feel like I would get bored, I still don't know what I would do there. I can't do outdoor adventure all the time."***

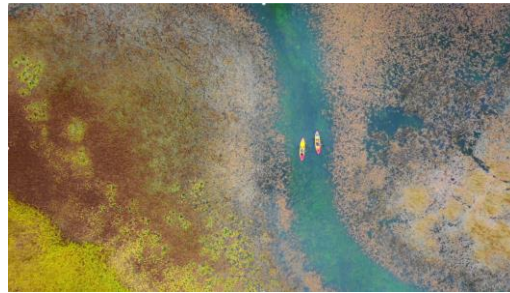
"I would want more relaxation and not so much physical activity."

"There is a lot to do there but seems like nothing indoors."



ADVENTURE CALLS TRAILER

Focus group participants were then shown the Adventure Calls trailer and asked a number of questions.



ADVENTURE CALLS TRAILER

First reactions to the Adventure Calls trailer were also largely positive. Focus group participants felt the messages in the video were conveyed with authenticity. *“It feels more authentic to hear a person talk about their experiences as opposed to a voiceover.”* *“It was more genuine, less forced and had a natural flow to his story.”* Participants complemented the video’s display of people doing things rather than beautiful aerial landscapes. *“The action is more compelling; it’s talking to me.”* Top emotions felt by participants were excitement, adventure, fun, up-lifting, thrilling, adrenaline and wanderlust. *“Going to the top of a mountain is inspirational.”*

The video made some participants feel Central Oregon was more approachable. Having multiple people use phrases like, *“You know I’ve never done this before right?”* was noticed and conveyed the message that Central Oregon is accessible.

The connection to National Geographic was positively received. *“The fact that National Geographic is interested in Central Oregon means I should be interested in it.”* Participants in multiple markets expressed interest in watching the Adventure Calls series after seeing the trailer.



ADVENTURE CALLS TRAILER



Focus group participants described connecting with the photographer more than the activities and experiences he engaged in. Some participants were not able to connect with the video because it primarily focused on intense physical activities. *“I’m not interested in those experiences.” “A younger me might like to go and do all those things.”* In spite of that, some of those same participants expressed instead being able to connect with the character of the photographer directly and enjoyed following him on his journey. *“I really like him and I want to see his adventure, but this is clearly for people who enjoy the outdoors and city people will not be welcome.”*

Some participants felt the focus on food and art was too limited and needed more attention. Participants in multiples markets shared the feeling that more of a focus on food/culinary experiences and arts/culture would enhance the video and make visiting Central Oregon more appealing. *“The food and art were just thrown in at the last minute, felt like an afterthought.”*