

An Abstract Of The Thesis Of

Martin Oppermann for the degree of Master of Science in Geography presented on January 17, 1990.

Title: A Comparative Study of Oregon and New Zealand as Tourist Destinations: Tourism Resources, Perceptions, and Travel Patterns

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Tourism has become an important factor in Oregon's and New Zealand's economies. Both destinations are trying to attract even more tourists. However, many other destinations are also competing for a bigger share of the tourism market. Tourism itself is a multi-faceted phenomenon and the travel destination decision is of some importance, not only for the person but also for the tourist destinations. A Travel Destination Decision Model was developed which integrates the most important aspects of the decision process. The purpose of this study was to examine relationships between some of these facets: tourism resources, perceptions, and travel patterns. It was hypothesized that: (A) a quantitatively and qualitatively better resource base results in a more favorable perception; (B) similar resource bases may still result in different perceptions; and (C) similar perceptions result in similar travel patterns and a more favorable perception results in a higher volume of travel flow.

A literature survey provided information on the tourism resource base and travel flow of both destinations. Data on the perceptions of both destinations were obtained through a

survey at Frankfurt airport, Federal Republic of Germany. The sample population of this self-administered questionnaire was 356 persons of international origin.

Hypotheses (A) and (B) were verified by the results of this sample population for the destinations Oregon and New Zealand. Hypothesis (C) was not supported for Oregon and New Zealand. This was attributed to their respective geographical locations and therewith induced factors such as cost, time, and accessibility. A test of hypothesis (C) for the relatively similar located states Oregon and California supported this assumption, as hypothesis (C) was verified for these destinations.

A Comparative Study of Oregon and New Zealand
as Tourist Destinations: Tourism Resources,
Perceptions, and Travel Patterns

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A Comparative Study of Oregon and New Zealand as Tourist Destinations: Tourism Resources, Perceptions, and Travel Patterns

I. Introduction

Only 120 years after the first organized mass-travel-excursion, tourism has become a widely recognized, internationally important economic factor. Industrialization, urbanization, and a revolution in transport technology combined with increasing wages, increase in leisure time, and high social mobility have resulted in the phenomenon of mass-tourism. Tourism has become a part of the life-style of millions of people. In 1986, 381 million people travelled across international borders and spent 130 billion US dollars. Tourists are competing for the social status of tourist destinations, tourist businesses are competing for more profit, and countries are competing for a bigger share of the tourism pie. In some countries tourism is seen as a panacea for economic underdevelopment and other countries are already dependent on the tourist trade. Tourism Departments from all over the world are using promotion campaigns to establish or change the image of their country.

An analysis of tourism is not only an analysis of actual travel patterns - such as numbers, origin, and expenditure - it is also an analysis of the reasons why people travel, and of their destination-choice. These are commonly referred to as 'push' and 'pull' factors of tourism. The former includes income, time availability, society, background; the latter includes factors such as natural attractions, cultural attractions, and infrastructure. However, this is a relatively simple model to explain tourism-flows, addressing only the

questions:

- what motivates/stimulates a person to travel
- what may attract tourists to a destination.

It doesn't address questions such as:

- how does a potential traveller receive information about a destination
- how does a potential traveller perceive a destination
- how does a potential traveller choose a destination

This study will address some of the above questions taking Oregon and New Zealand as examples of international tourist destinations.

Oregon and New Zealand appear at first to be relatively similar. They cover equal areas, they have roughly the same population size, concentrated in few population centers. Both are rich in natural attractions. Both have a small indigenous population, and a predominantly anglophile culture. Their economies are still dependent on primary products with tourism playing a major role in both economies. Both are trying to expand the tourism sector to increase the diversity of their economy. However, besides geographical differences - island versus rim of a continent position, and southern versus northern hemisphere - there are some other differences. Slogans like "the two most beautiful islands in the world" and "colorful New Zealand - the world in one country" for New Zealand, and "things look different here" and "but it isn't the volcanoes that have made a name for the Northwest, mostly it's the rain" for Oregon reveal substantial differences in the images, at least as they are portrayed by information media. What underlies this difference? Is the tourism resource basis different despite the similarities? How are both destinations perceived by potential visitors? Is the different image reflected in a different travel pattern? These are but few questions this study will address.

I.1 Definitions

In the existing literature the terms 'image' and 'perception' are used with different meanings. Some use image and perception as synonyms (Mill and Morrison 1985; Hunt 1975; Crompton 1979), while others use the term 'image' as an equivalent to a 'brand' name (Britton 1979). Still others make distinctions between image and perception (Goodrich 1978, Johnston and Tieh 1983, Dilley 1986).

In this study 'image' is defined as the resource base as portrayed by the information media. The individual factors of the resource basis will therefore be referred to as 'image attributes'. The term 'perception' will be used as the mental conception of an image. This is done in accordance with the use of these terms by Johnston and Tieh (1983:280):

" 'Perceived' images, on the other hand, are the sum of the ideas, beliefs and impressions that people possess about particular places. They are by their very nature, subjective and probably highly individualistic."

I.2. Study Objectives and Methodology

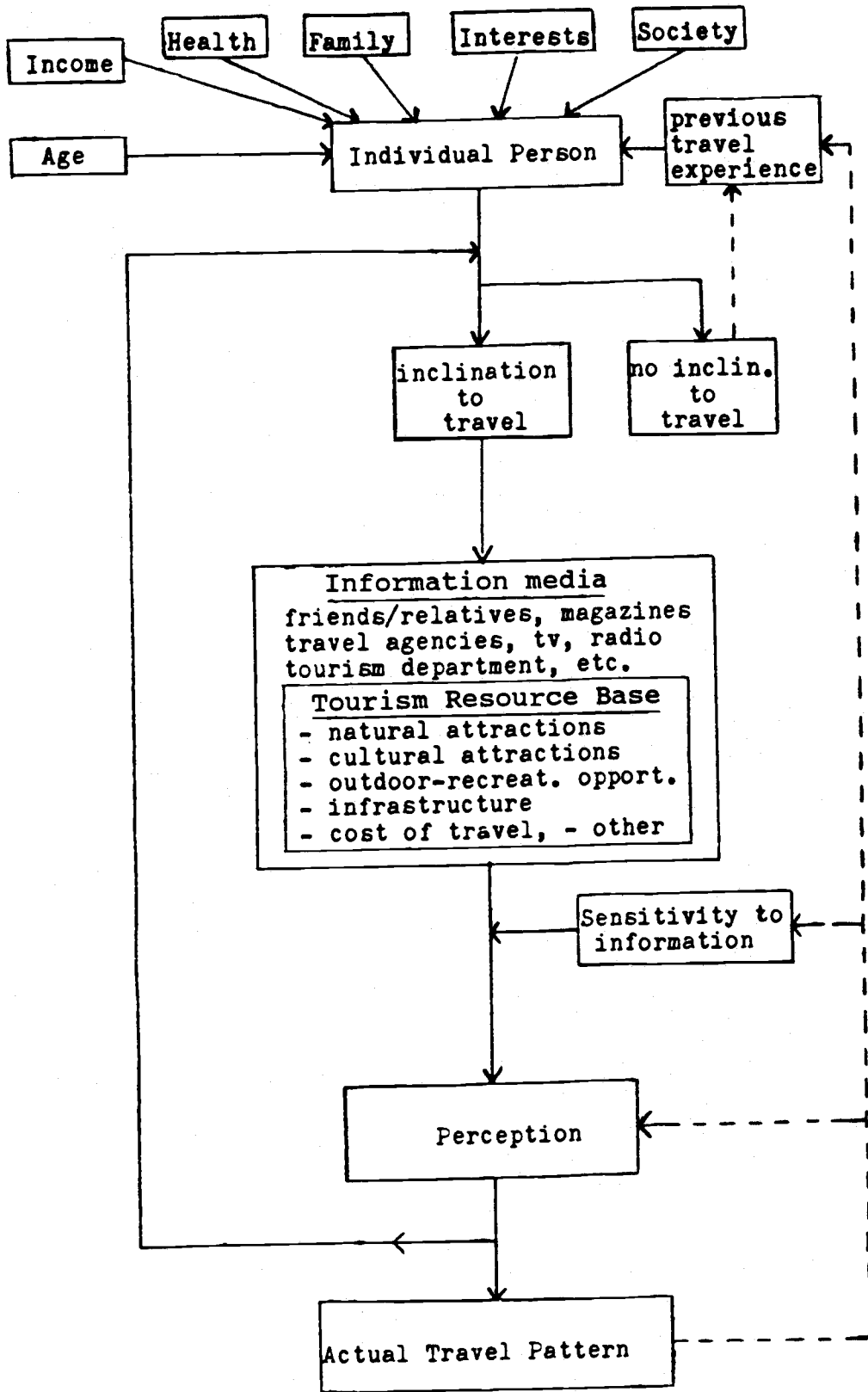
The objective of this study was the comparison of tourist destinations and the extent to which their assets and liabilities influence the actual travel pattern. To attain this goal the assets and liabilities will be identified in accordance with the following questions:

- what is the tourism resource base of each destination
- how is this resource base promoted through the different information media
- how is this image perceived by potential travellers
- what is the actual travel pattern in both destinations.

These questions were developed simultaneously with the Travel Destination Decision Model (TDDM) (Figure 1). The TDDM differs from other models in various ways. The general model of 'push' and 'pull' factors of tourism (f.ex. Hudman 1980) does not address any questions related to information media, perceptions, and destination-choice. A model by Mill and Morrison includes sensitivity to information and perceptual bias (Mill and Morrison 1985:17). However, it is very complex and does not explicitly address the tourism resource base. Woodside and Lysonski developed a "general model of traveler leisure destination awareness and choice" (Woodside and Lysonski 1989). While it emphasizes destination awareness and therefrom resulting destination preferences, the tourism resource base is somewhat neglected and therewith the question 'what attracts a person to a destination'. In addition it does not seem to address the various information media and the perception of a destination.

The Travel Destination Decision Model developed for this paper, describes travel flows with regard to each individual's decision process and influencing factors. Because the travel destination decision is influenced by numerous personal or individual factors, the world travel flows can be seen as the sum of each personal decision. Hence, the factors influencing this decision are discussed at the individual level. A person in the market, influenced by factors such as income, age, health, society, previous travel experience, social status, etc., may have an inclination to travel. However, this inclination may be felt more or less strongly, or even not at all. The latter would be called a negative inclination to travel. The person then gathers, actively or passively, information about travel destinations. This may be information about one particular destination or several at the same time. Woodside and Lysonski (1989) suggest that a person generally takes only a few destinations

Figure 1: Travel Destination Decision Model



into consideration.

The information sources are friends and relatives, official tourist departments, travel agencies, books and magazines, advertisements or also previous experiences in that or similar destinations. In general this information deals with the resources of tourism, such as natural beauty, climate, wildlife, historic and cultural attractions, along with infrastructure, cost of travel, and so forth. Mill and Morrison (1985) suggest that a person is sensitive to certain information only, mostly in areas of his/her interest. For example, a scuba diver is sensitive to information regarding coastal areas and reefs, but not sensitive to information about deserts. He therefore may never actively gain knowledge about the latter and never consider it as a travel destination.

Each individual is not only differently sensitive to information and therefore obtains different kinds of information, but is influenced by factors such as previous travel experiences, travel motivations and other personal factors. Thus each person has different perceptions of a tourist destination after having obtained information.

The person then evaluates his/her perception and makes the decision to travel or not to travel to that particular destination. If the person decides to travel and the visit actually takes place, he/she becomes part of the world tourist flow. If the person decides not to travel he/she will go through the whole process again until a destination is found. However, this decision/evaluation process most likely takes place for several destinations at the same time, and the various destinations are evaluated and compared with each other. Also a decision not to travel to a destination may be altered after others have been reviewed. Still another possibility is that a person decides not to travel at all, either right from the beginning or after evaluation of one or

several destinations.

The final decision and the resulting visit to a destination makes the person a part of the actual travel pattern of that particular destination. This destination may be domestic or international. However, this study will deal only with out-of-state/international visitors to the destinations Oregon and New Zealand.

The hypotheses of this study are that:

- (A) a quantitatively and qualitatively better resource base results in a more favorable perception;
- (B) similar resource bases may still result in different perceptions;
- (C) similar perceptions result in similar travel patterns and a more favorable perception results in a higher volume of travel flow.

This study combines several aspects of previous studies. Tourism resources, perceptions, and an analysis of travel flows were all subjects of previous studies (II.), but to my knowledge, so far no attempt has been made to establish and determine relationships between these three facets of tourism. Hence, it can be seen as a pilot study for a better understanding of world travel flows and its influencing factors.

For easier comprehension, Oregon and New Zealand will be presented one after the other in most parts of this study. At first a general description of both countries will be given to familiarize the reader with both destinations. In section V the tourism resource bases will be presented and section VI will deal with the information media of tourism. A survey will be the major focus of section VII. Besides Oregon and New Zealand, California was included in the survey. This was done to get a comparison of the quantitative results for Oregon and New Zealand. Section VIII will describe the actual

travel patterns. All the previous points will be brought together in a comparison of both destinations in section IX, along with the testing of the hypothesis. How the results of this study could be applied is the focus of section X. Limitations of this study and the conclusion round out this study.

II. Literature Review

The geography of tourism is a relatively young field of geography, although tourism is an old phenomenon. The first articles were published in the 1930's. During the following decades only sporadic articles were published. The rapid increase in tourist numbers after World War II not only led to recognition of tourism as an important factor in the economy, but also attracted geographers to study this field. The geography of tourism is, in a sense, a mirage of the whole field of geography. It reaches into the various subfields of geography and can not be integrated into just one subfield. Physical geographers may study natural attractions and physical impacts of tourism. Historical geography is requested by studies on the historic development of resorts and tourism cycles. Social geographers may study travel behavior and motivations of different social groups and the social impacts of tourism on the host community. Economic geographers may be interested in economic impacts and development potential of tourism, while the geography of transportation analyses travel flows and routing. Quantitative methods and spatial analysis are important methods in the geography of tourism. Regional geography is involved, when tourism in a region is described and the systematic of regional geography is often used in travel guides.

In this study the literature has been divided into four categories: (1) general studies of tourism or the tourism industry (Hudman 1980; Mill and Morrison 1985; Gunn 1988, Gee, Makens and Choy 1989); (2) studies dealing with tourism resources and tourist attraction research (Gearing, Swart and Var 1974; Ritchie and Zins 1978; Ferrario 1980; Smith 1987). Gearing, Swart and Var used 17 image attributes to evaluate the tourist attractiveness of 65 touristic areas in Turkey

(Gearing, Swart and Var 1974). Ritchie and Zins examined the importance of various cultural attractions to the overall attractiveness of a tourist destination (Ritchie and Zins 1978). Ferrario studied the tourist resource base of South Africa. He identified the tourist attractions by using 10 guidebooks (Ferrario 1980). Smith collected data on a variety of tourism resources in Ontario, Canada. These data were then quantified on several index scales for each county (Smith 1987);

(3) studies relating to information-media and their role in promoting a tourist destination (Britton 1979; Dilley 1986). Britton examined advertised images of Third World countries and discussed the inability of the tourism industry to portray destinations as real places (Britton 1979). Dilley studied tourist brochures to uncover general patterns in the projected image. Seventeen themes and their importance in the portrayal of 21 countries were used (Dilley 1986);

(4) studies dealing with images, perceptions, and preferences (Hunt 1975; Goodrich 1978; Crompton 1979; Johnston and Tieh 1983). Hunt studied differences in perception of 18 image attributes by citizens of five cities in the United States towards four Rocky Mountain States (Hunt 1975). Goodrich compared the perceptions of nine tourist destinations with respect to ten image attributes and correlated these with the preferences of these destinations by the same sample (Goodrich 1978). Crompton examined the perceptions of Mexico as a vacation destination as held by students in the United States. The main purpose was to identify the influence of geographical location upon these perceptions (Crompton 1979). Johnston and Tieh studied the differences between projected images of six destinations by travel brochures and the perceived image of these destinations by a sample (Johnston and Tieh 1983);

(5) regional studies of tourism and tourism resources in

Oregon (Brown and Howard 1989; Runyan 1989) and New Zealand (Pearce 1977; Lim 1989). Brown and Howard examined the effects of a promotion campaign by the Oregon Economic Development Department, Tourism Division (Brown and Howard 1989). Runyan studied the tourist industry in Oregon (Runyan 1989). Pearce examined the demand and supply of the tourist industry in New Zealand (Pearce 1977). Lim studied the economic importance of tourism in New Zealand (Lim 1989);

(6) other studies which are related to this study (Teye 1982; Woodside and Lysonski 1989). Teye compared two African countries with respect to their tourism resources and travellers, and how the principal characteristics of both countries influence their tourism development (Teye 1982). Woodside and Lysonski developed a model of destination awareness and choice and examined some relationships within this model. The main hypothesis is that every person places destinations into a destination awareness set consisting of four categories: consideration set, unavailable set, inert set, and inept set. The size of these awareness categories is small (Woodside and Lysonski 1989).

III. Data

This study is based on secondary and primary data. Secondary were used for general information for most parts of the paper.

In part VI., travel guides were used to measure the importance of 18 different themes in travel guides in their presentation of both destinations. For a better comparison travel guides of the same series were used for both destinations. Rows were counted and assigned to the corresponding 18 themes. These included scenery, outdoor-recreation, historic attractions, infrastructure, cultural and urban attractions, mountains, coast.

The data on Oregon were mainly based on a study by Runyan & Associates (1989) and on compiled statistics for the United States (Goeldner et al 1975 and 1984). For New Zealand they were primarily based on data provided by the New Zealand Department of Tourism. A comparison of these data has to be treated with care, as they are not of the same accuracy. The data for New Zealand are based on counting all visitors on arrival and departure (number, origin, length of stay, seasonality), data provided by banks (tourism receipts) and questionnaires. In contrast, most data on Oregon were acquired by sampling a few hundred visitors, few thousand residents and firms. This provided a visitor profile and estimated figures rather than hard data. These differences in data are partly a result of different geographic locations, island versus continent. It is much easier to count tourist arrivals at a few airports and harbors than along state borders of several thousand miles.

Primary data in form of data collected through a self-administered questionnaire are used in part VII. An airport was chosen as the site of this survey for the following reasons:

- the sampled population may be more familiar with long distance destinations;
- higher probability that sample population was familiar with Oregon or New Zealand;
- the sampled population is already spending more money on travelling through purchase of flight-tickets and might therefore be more likely to visit one of the studied destinations in the future;
- it allowed for sampling an international population at the same time.

The survey was conducted on September 4-8, 1989 at Frankfurt airport, Federal Republic of Germany. This airport is the major international airport in West-Germany and the second busiest in Western Europe. From Frankfurt both destinations are longhaul-destinations. It is 18,000 kilometers to Auckland, New Zealand and 9,000 kilometers to Portland, Oregon. West-Germany was also selected as the country of this survey, because in 1988, 27.2 million West-Germans travelled abroad spending more than 44 billion Marks (23 billion U.S. dollars), more than any other nation in the world. This makes West-Germany a primary tourism market for any destination.

Five weeks prior to the survey date, the author applied for a permit. A permit was granted to conduct the survey on the mentioned five days during any time of day in the transit lounges of Frankfurt airport. A time span between 8:00 am and 5:00 pm was chosen.

Identical questionnaires were developed in German and English. They were kept as simple and straightforward as possible for easier comprehension in this self-administered survey. However, the author was always within range to answer questions concerning the meaning of the questions. Except for the meaning of the word 'infrastructure' there did not seem

to be any difficulties.

The author approached every second seated person and, after explaining the purpose of the questionnaire, asked that person to fill out one of the questionnaires. Of the 400 persons approached 36 declined. Of the 364 returned, 356 were fully completed questionnaires, constituting the sample population used in this survey.

Although the sampled population was not necessarily representative of the total West-German population, it seemed to be reasonably characteristic for an international airport population. With this reservation in mind, the sample was treated as a probabilistic random sample. Besides general descriptive statistics, the parametric test of interval estimation was used. After the central limit theorem, the presence of non-normality of a large sample is often insignificant, especially when the sample population is larger than 100.

IV. Geographical Setting

A brief overview of geographical location, geology and geomorphology, climate, vegetation, history, population, and economy are the focus of this section.

IV.1. Oregon

IV.1.1. Geographical location

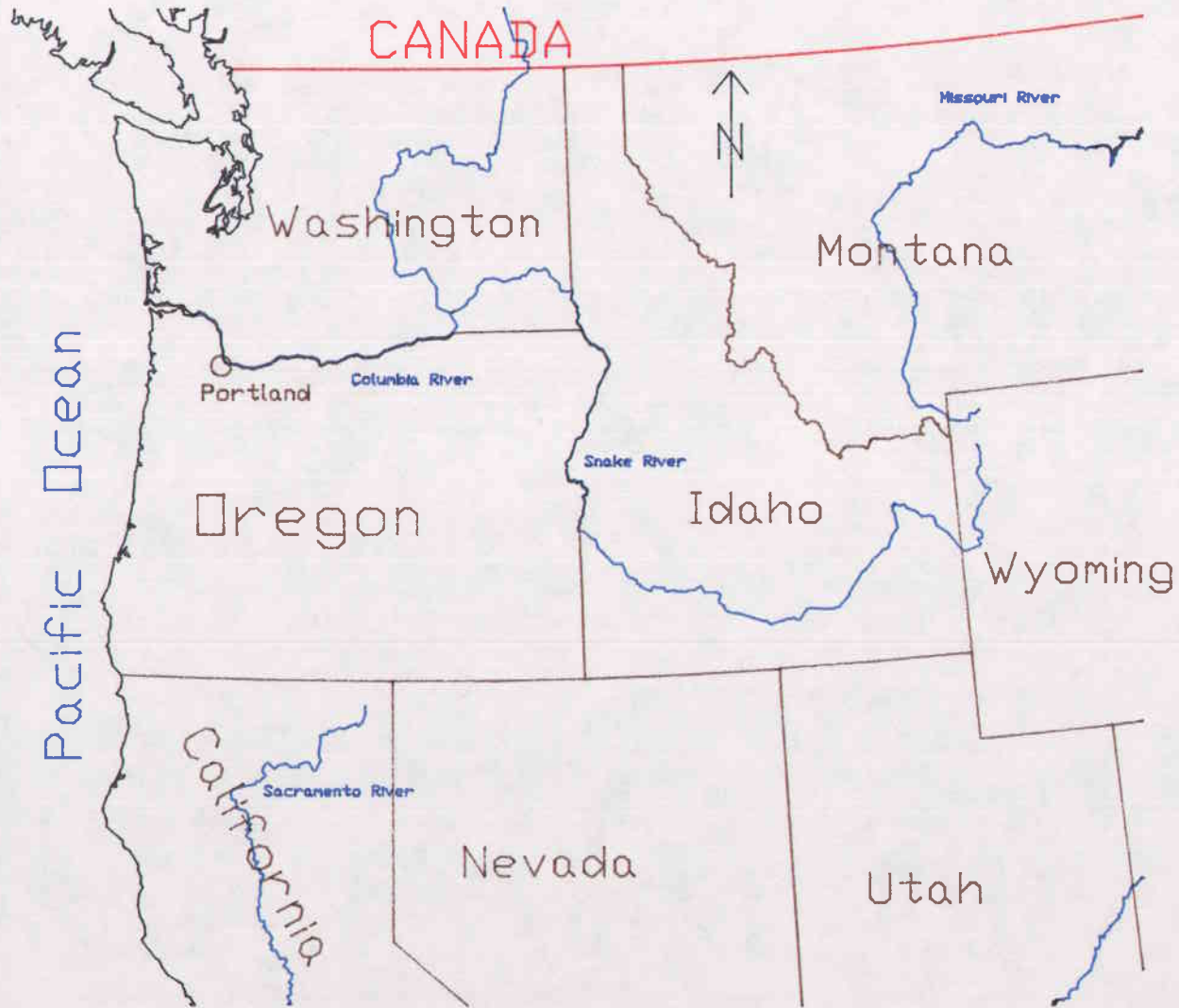
Oregon is situated in the Pacific Northwest of the United States of America, at the Pacific Coast, between 42 and 46 degrees north latitude and 117 to 124 degrees west longitude. The four borders of its roughly rectangular shape are Washington to the north, California to the south, Idaho to the east and the Pacific Ocean to the west (Figure 2).

Geographically Oregon is relatively isolated, as the main population centers of North-America and of the world are relatively distant. For instance, Los Angeles is 1,360 km, New York 4,000 km, London and Tokyo are about 8,000 km by air (Kimerling 1985).

IV.1.2. Geology and geomorphology

The geological history of Oregon is rather complex. While the western part seems to be mainly influenced by the subduction of the Pacific Plate beneath the North-American Plate represented by Oregon, resulting in a general north-south orientation of the mountain chains. The eastern part is influenced by several fault lines and uplifts in diverse directions. The main features of Western Oregon are the Coastal Range and the Cascades, with the Willamette Valley in between. Crowning the Cascades are several volcanoes, Mount

Figure 2: Geographic location of Oregon



Hood, Mount Jefferson, and the Three Sisters, to name a few. Eastern Oregon is partly a high plateau, partly a low plain, above which the central mountains and several other mountain chains are towering.

IV.1.3. Climate

The main factors influencing Oregon's climate are the proximity of the Pacific Ocean, its position astride the mid-latitude cyclonic stormbelt and the north-south orientation of the Cascade mountains. The latter forms a distinctive west-east moisture divide, which shields Eastern Oregon from moderate oceanic influences. The change of the atmospheric circulation results in a high temperature and precipitation variation between summer and winter months. Oregon can be divided into two major climatic regions. Western Oregon with its humid and cool winters, but dry and warm summers, and Eastern Oregon with its relatively dry, continentally influenced climate (Jackson 1985).

IV.1.4. Vegetation and Fauna

The natural vegetation of Oregon is varied, reflecting the variations in climate and elevation. In Western Oregon, redwood, cedar, hemlock, and Douglas fir forests are dominant, while in Eastern Oregon sagebrush, grassland, ponderosa pine and western juniper forests are found. As the forests are one of Oregon's major resources, old-growth forest is becoming sparse (Frenkel 1985).

Deer, elk, bears, and cougars are some of the wild animals in Oregon. Trout, steelhead, salmon, and other fish populate the rivers and lakes. Whales pass by the Oregon

Coast on their annual winter migration towards Mexico.

IV.1.5. History and population

Indians inhabited Oregon for a long time before the first Europeans reached its borders. Oregon was 'discovered' by Spanish and English voyagers. However, nobody took a lasting interest in this remote land. This changed with the voyage of Captain James Cook in 1778, who charted Oregon's coast and discovered the trading potential of the Pacific Northwest. Other voyages, with predominantly economic interests were later undertaken by Spaniards, English, and Americans.

The first successful overland expedition was led by Lewis and Clark in 1804-1806, and gave the United States an advantage in claiming the Oregon Country. Soon traders and settlers followed. The number of natives decreased significantly during this time, due to diseases. An English-American dispute over the ownership of the territory was finally settled in 1846, with the establishment of the 49th parallel as the boundary between Canada and the United States. In 1859 Oregon became a state of the United States (Munford 1985).

In 1987, 2.7 million people were living in Oregon, resulting in a population density of 11 persons per square kilometer. Of these 420,000 live in Portland and another 580,000 in the major cities in the Willamette Valley, leaving the better part of Oregon, especially Eastern Oregon, relatively uninhabited.

The majority of the population are of European descent. One per cent are of Indian origin, 2.6 per cent hispanic, 1.4 per cent black, and 3.5 per cent of other origin.

IV.2. New Zealand
IV.2.1. Geographical location

New Zealand is situated at the rim of the South Pacific. It is composed of three main islands, North Island, South Island, and Stewart Island which are separated by relatively narrow straits. The New Zealand landmass lies along a southwesterly northeasterly axis. It stretches from 34 to 47 degrees South Latitude and 166 to 178 degrees East Longitude. With its 268,000 square kilometers it is similar in size to Oregon (Figure 3).

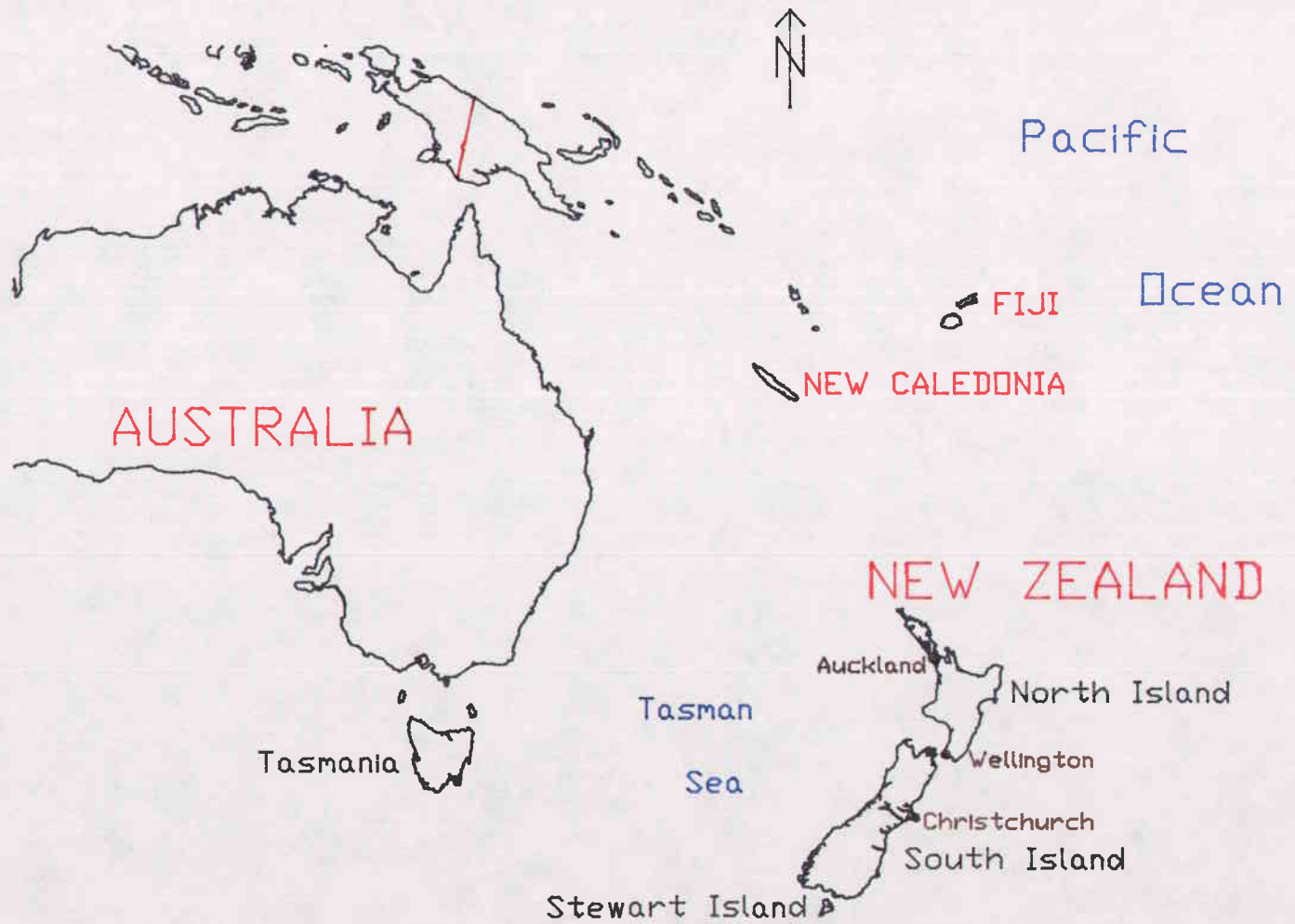
The closest landmass is Australia, 1,600 kilometers to the West across the Tasman Sea. San Francisco is about 10,000 km, Tokyo 9,000 km, and London 18,000 km away.

IV.2.2. Geology and geomorphology

New Zealand has a long geologic history during which it was submerging and resurfacing frequently. The oldest rocks are 600 million years old (New Zealand Official Yearbook 1983). Erosion and mountain building processes have done their share in forming New Zealand's features. New Zealand, like Oregon, is today a part of the Pacific 'Ring of Fire'. Volcanoes, hot springs and geysers are common sights just as earthquakes are a common phenomenon.

A very lengthy coastline and its mountainous character are but two physical characteristics of New Zealand. less than 25 per cent of the land surface is below 200 meters (Barlow and Newton 1981). Most of the ranges on the North and South Islands run parallel to the coast. The Southern Alps are the most dominant and distinctive range in the South Island, featuring Mount Cook (3,764m), the highest mountain in Austral-Oceania. The mountains on the North Island are

Figure 3: Geographic location of New Zealand



dominated by the volcanoes Mt. Ruapehu, Mt. Egmont and Mt. Ngauruhoe. Fjords and U-shaped valleys on the South Island are reminders of the last ice-age.

IV.2.3.

Climate

Due to its long overall length, New Zealand stretches between the subtropical mean high pressure belt and the hemispheric westerly airstream. However, three other main factors influence the climate of New Zealand: (1) the eastward moving anticyclones and cyclones, whose frequencies, intensities and preferred paths vary over the year; (2) its position in the midst of a vast ocean, which has a greatly modifying influence on the hot air-masses from Australia or the freezing air-masses from the Antarctica, with both retaining little of their original character after their long ocean passage; and (3) the shape and topography of the country itself (New Zealand Official Yearbook 1983).

The chain of mountains along the axis of New Zealand is a barrier in the path of the prevailing westerly winds and therefore the cause for the sharper climatic contrast between west and east than north and south. This explains the continental character of some inland areas on the South Island, despite the fact that no point of New Zealand is more than 130 kilometers from the sea. Humid air-masses combined with sharp rises in topography result in high orographic rainfalls along the Westcoast and some mountains inland, and relatively low precipitation on the eastern side of the country (Barlow and Newton 1981).

IV.2.4.

Vegetation and Fauna

The vegetation reflects the climatic variations of New Zealand. Rainforests with ferntrees and palms on the Westcoast of the South Island and an arid Steppen Climate on the eastside, the transition often abrupt. Due to its long isolation from other land-masses (approximately 30 million years since it separated from Australia and 70 million years from Southeast-Asia) it has several endemic plants, found nowhere else in the world. The Three King Island Nationalpark is known for its unique flora.

The long isolation and the from the beginning missing predaceous animals have made New Zealand to a preservation of birds. As a result many birds have lost their flying capabilities, the best known is the Kiwi.

The Maoris brought the first domestic animals with them, such as pig and dog. The white settlers imported sheep, deer, rabbit and many more. Some of those have escaped into wilderness and because of missing natural enemies reproduced in high numbers. The rabbit and red deer have even become a plague to the farmers.

IV.2.5.

History and population

The exact date of the first arrival of the Maoris from Eastern Polynesia is not known, but anthropologists assume that the first arrivals came about the 9th century A.D. Finding no other inhabitants these Polynesians returned to their homeland and spread the word. As a result several waves of migration took place in the following centuries. It was also these first Polynesians who named it 'Aotearoa', the 'land of the long white cloud' (New Zealand Official Yearbook 1985).

Abel Tasman was the first European to discover 'Nieuw Zeeland' in 1642, 127 years before James Cook came to New Zealand. Following Cook's several voyages and careful observations settlers began to arrive. In the 19th century it came to rivalry and wars with the Maoris. These wars were dissolved with the signing of the 'Treaty of Waitangi' in 1840. The number of Maoris sharply declined after confrontation with European diseases but is rising again since the turn of this century. Maoris constitute 9 per cent of the population in the 1980s.

V. The Tourism Resource Base

The tourism resource base and the information about these together form the image of a tourist destination. This section will deal with the tourism resource base, or the image attributes of a tourist destination. These image attributes include natural and cultural attractions, the infrastructure and accessibility of destinations, and other factors such as climate, seasons, travel cost and political stability. However, the idea of a tourism resource base is more a conceptual idea, as these image attributes are seldom of quantitative value and may vary depending on the market. For example, although the beaches of Italy may be a highly valued attraction for tourists from Northern Europe, they may not be equally valued by tourists from Spain or Greece.

The tourism resource base may also change over time as new attractions are developed, the infrastructure within a destination area expanded, the access to the destination improved by reduction of travel time or cost, and so forth. Even natural attractions may be altered by construction of a new road to a previously hardly accessible site. For example, Milford Sound in New Zealand only became a major tourist attraction after the road-access was completed. Another example would be Mount St. Helens, which became a major tourist attraction after its eruption in 1980. There are also changes with negative results. The big oil-spill in Spring 1989 in Alaska damaged the natural attractions in that area, the beaches, the fishing opportunities, etc., and apparently had a severe negative impact on tourism for the whole region.

The climate and the climatic seasons of a tourist destination, on the other hand, are relatively constant factors and may only change over long periods of time. The main holiday season in the tourism market, or institutionalized holiday season, is subject to change, as

the actors in the market are trying to deconcentrate the tourist season.

V.1.

Oregon

"What comes to mind when people think of Oregon? For many, it is the forested mountain slopes, rugged coastline, outstanding scenic vistas, broad expanses of open space and farmland, and clear, flowing streams. For other's it is the state's rich and colorful history - the Indians who inhabited this area for centuries, Lewis and Clark, the Oregon and Barlow Trails, and numerous other people and events which shaped and gave Oregon its character. Oregon's natural and historical resources are, to a large extent, what makes Oregon."
(Senate Interim Task Force 1980:2)

V.1.1.

Natural Attractions

Oregon features a rich variety of physical features, climates, and vegetation. The relative proximity of coast, mountains, and deserts reinforces the natural attractiveness. The rugged Oregon Coast, with its sandy beaches, sand dunes, and rocky headlands is in public hands and freely accessible.

Forested hills of the Coastal Range, the green Willamette Valley, and the forested mountain slopes of the Cascades, crowned by snow-capped volcanoes, chain up in a north-south direction. The high desert has its own attractiveness, as do the central mountains like the Wallowas, Blue Mountains, and Strawberry Mountains. Volcanoes and hot springs are still signs of the active geologic history, as are the fossil beds of Central Oregon.

Wild mountain rivers are cutting their way through Oregon's landscape. The two largest rivers, the Columbia and Willamette, are tamed by dams for most of their way. The Columbia Gorge with its scenic vistas and waterfalls is a major attraction for tourists and the canyons of the Central Mountains and Hell's Canyon are at least as scenic.

Despite its rich variety, Oregon features only one National Park, Crater Lake National Park (641 sq km), and with Oregon Caves and John Day Fossil Beds (58 sq km) just two National Monuments. But the relatively wild and scenic Oregon is given justice by its 15 wilderness areas with a total of 4,224 square kilometers, or 1.7 per cent of Oregon's total area. The bulk (53%) of the land is in public hands, managed by the various national and state agencies.

V.1.2.

Outdoor-Recreation

Oregon offers the natural setting for a variety of outdoor-recreation activities. "Resources necessary for specific activities are available - mountains to climb, untrammelled wilderness to hike, beaches to comb, forests and fields to hunt, and lakes and streams to fish."
(Nolan 1985:124)

The Cascades and Central Mountains provide for all kinds of mountaineering, from mountain hiking to climbing during the summer months, and for downhill skiing in winter. Seventeen alpine ski areas with a total of 3245 acres serve the skiers. The lower reaches and slopes are used by hikers and crosscountry-skiers. Some long distance treks exist, like the Oregon part of the Pacific Crest Trail, and Oregon Coast Trail. Others are being developed, such as the High Desert Trail. These trails are also used for horse trekking and more recently for llama trekking.

The sea, lakes, and rivers attract all kinds of water recreation sports. Various kinds of boating, water skiing, and white water rafting are very popular. Some of Oregon's rivers are now part of the Wild and Scenic River System. these include the Wild Rogue, Deschutes, John Day and Snake rivers. Five hundred twentyeight river miles in 8 rivers are protected by state programs, another 155 miles by the National Wild and Scenic River System.

During the seasons hunting and fishing are popular activities. Deer and elk are object of the former, while the latter prefer salmon and steelhead. However, fishing has drastically declined in some inland areas, due to construction of dams in the lower reaches of the rivers.

V.1.3. Cultural Attractions

Despite its indigenous population Oregon is dominated by its anglophile culture and lacks ethnic diversity, except for some urban areas. The Indian cultures were overrun by the rapid influx of white pioneers and settlers in the 19th century and today only small groups of Indians exist. The Warm Spring Reservation is one example. They live today partly from the tourists, who visit the KaNeeTa Resort on their Reservation. Indian Ruins such as those in the Southwestern U.S. are non-existent.

Of greater attraction value for most visitors are the historic trails, towns and monuments, which are witnesses for the historic development of white colonization and settlement. The Oregon and Barlow Trails are two of the better known attractions. Fort Clatsop and McLoughlin House both have the status of a national historic site. However, while these historic sites may be of major interest for Oregonians or North-Americans, they may not be equally

valued by European visitors.

Portland and Eugene are Oregon's two cities each with more than 100,000 people. Only Portland has international flair. Due to the influx of mainly Asian immigrants during recent decades, the cuisine has become more international and restaurants from all parts of the world can be found in Portland. Portland also offers the Rose Festival, which attracts about 200,000 visitors during 10 days in June. Other major festivals are the Oregon Shakespearian Festival in Ashland (320,000 visitors), the Bach Festival in Eugene, and the Salem Art Fair and Festival (Hill 1988).

Shopping facilities are best in Portland. Art and crafts are sold in numerous places along the Oregon Coast. During recent decades, a number of wineries have been established in the Willamette Valley, and it is popular with some people to visit them.

V.1.4.

Infrastructure

Oregon, as part of the U.S., is integrated in the road network of the Far West. Two major freeways, I 5 and I 48, give access to the North and South and the East respectively. Several other highways, mainly in the western part of Oregon, complete the road network.

Following closely the routes of I 5 and I 84 are two major railroad tracks, mainly used for goods. Public transportation is mainly dependent on buses. Regular connections between the major towns of Oregon and with towns in the adjoining states exist.

Still another possibility for travellers is the air plane. Portland as an international airport has the dominant role in serving Oregon. Eugene and Salem feature in-state flights and some flights to destinations outside Oregon.

Several other, smaller airports complete the flight-network in Oregon.

Except for the Coastal Area, the Willamette Valley and parts of the Cascades, the public transportation facilities are rather sparse and a car is often necessary to reach a certain destination. The usual rent-a-car firms do business in Oregon, and services are available in all major towns.

There exist a wide range of accommodation facilities in Oregon, from the expensive five star hotels to free unserviced campgrounds. There are 1,546 hotels/motels with 32,185 units and 1,193 campgrounds with 22,717 units are available for tourists (Lawrence et.al. 1989). These facilities are concentrated west of the Cascades. Except for Portland and Eugene, the visitor is generally limited to a choice between the various kinds of domestic cuisine.

V.1.5. Other image attributes

Oregon's seasons are similar to those of the main tourism markets. The summer months, June until September, with their generally warm and sunny weather, are the most favorable months to travel in Oregon, especially for most kinds of outdoor-activities and sightseeing. The opposite season is naturally preferred by skiers. The institutionalized holiday season of the main tourism markets falls into the same time, which may be an advantage for Oregon. The disadvantage, however, are the numerous intervening opportunities in the form of other destinations, which may offer similar attractions, for example, Colorado, Washington and British Columbia, and may be more attractive or closer to the persons in the market.

Oregon's dominantly anglophile culture is similar to the main tourism markets, which is important to those travellers,

who like to experience different scenes in familiar surroundings. Oregon, as a State of the U.S., is also politically stable and a generally safe travel destination.

The initial travel cost, necessary expenses to reach the destination Oregon, varies depending on the market. While the markets of the Far West are relatively close to Oregon and therefore the cost relatively low, the initial travel cost may pose a barrier in the European and Japanese market, and to a lesser extent in the Eastern States or Provinces of the United States and Canada.

The travel cost within Oregon varies also according to the market and to the individual person. While for the North-American market Oregon is a average priced destination, for the European market it may be a relatively expensive destination, depending on the exchange rate.

V.2.

New Zealand

"..., it has varied and spectacular scenery including snow capped mountains, glaciers, geysers, boiling pools, unique glowworm caves, beautiful lakes, and fine beaches."

(U.S.Department of Commerce 1961: 177)

"With features such as the amazing thermal areas, magnificent lakes and fjords, glaciers, alpine regions, and unrivalled hunting, fishing, and other sporting opportunities, New Zealand combines in a comparatively small area a host of attractions, - each one would make a country famous. In addition to these natural attractions, the dignity and charm of the Maori race offers a culture for study which is unique to New Zealand."

(New Zealand Official Yearbook 1968:997)

V.2.1.

Natural attractions

As expressed above, New Zealand contains a huge variety of natural attractions. While each attraction may not cover a large area, the number of different attractions in a comparatively small area results in a high density of different attractions - offering a multitude of different opportunities for the visitors.

The natural scenery, especially the dramatic changes in scenery - one moment in the rainforest of the Westcoast and the next in with brown tussock-grass covered Central Otago, or swimming in the sea and having a view of Mount Cook -not only invites sightseeing, but all kinds of outdoor-activities.

Major natural attractions include the volcanoes on the North Island, some of them still active like Mount Ngauruhoe. Also popular are the limestone and glowworm caves of Waitomo, thermal areas of Waikarewarewa, Hot Water Beach, the rugged landscape with the enclosed fertile valleys and coastal areas of the eastern part of the North Island, and the pastoral farming landscape of Waikato.

The South Island features the snow- and icecapped Southern Alps, with nine peaks rising above 3,000 meters. The from glaciers deeply caved Fjordland, Milford Sound, to name its most famous. The glacier lakes of Central Otago are embedded in tussock grassland. The sunken valleys of Marlborough Sounds, the rugged and rainy Westcoast and the flat Canterbury Plains are also touristically important natural features.

As incomplete as this list may be, it shows the variety of different landscapes and natural attractions. Parts of these different attractions are protected and preserved in National Parks, Forest Parks, Maritime Parks, and other protected areas. The first National Park, Mount Tongariro

National Park, was established in 1887, only 15 years after Yellowstone National Park, as the fourth National Park in the world.

As of March 1987, 21,733 square kilometers, or 8.1 per cent of the total area of New Zealand, are designated National Parks. Another 6.6 per cent are Forest Parks and 1.3 per cent are Scenic Reserves. Nature Reserves, Scientific Reserves, Wildlife Sanctuaries, and Wildlife Refuges are other classes of natural land protection. Combined a total 2,017 areas with 50,007 square kilometers or 18.6 per cent of the land are protected. This high percentage demonstrates the importance of land protection and preservation in New Zealand. Natural land is valued as a resource, not at least to attract tourists.

Sightseeing flights and cruises are often offered and sought after, as they offer an easy way to have a visual access to the 'wilder' areas of New Zealand. Several hot springs and mineral pools, partly well developed, offer a still different type of attraction. As an island New Zealand features a very lengthy coastline, which in itself is already an attraction for sightseeing and outdoor-recreation.

V.2.2. Outdoor-Recreation

Based on its varied natural setting a wide range of outdoor-recreation opportunities exist. From mountain climbing to yachting, from big game fishing to deer hunting, from trekking to white water rafting - there are outdoor-recreation possibilities for everyone. These are also a favored past-time activities of New Zealanders on their weekends and holidays.

Mountain climbing is mainly done in the Southern Alps, but the mountains on the North Island also attract some

mountaineers. A wide range of trekking opportunities exist, from short to long distance treks, and from easy to difficult ones. The Milford Sound Trek may be the best known among many others, and the Routeburn trek, with 8,000-9,000 trekker per year (Davison 1987), is probably one of the most walked. Abel Tasman, Heaphy, Copland, Lake Waikaremoana are just a few examples of the excellent trekking opportunities in New Zealand. In some areas pony or horse trekking is also facilitated.

Ski-areas are mainly developed in the Southern Alps, partly on glaciers to facilitate year-round skiing. However, ski-fields also exist at Mount Egmont and on the central volcanoes of the North Island.

Hunting and fishing is possible, in some areas even welcome, and Lake Taupo is famous for the size of its trout. Big-game fishing off the coast is another attraction and the marlin a favored prize.

Numerous lakes and rivers provide the facilities for all kind of water sports. White water rafting on the Tongariro, Rangitikei and Shotover rivers, water skiing, and jetboating or ice-skating on a frozen lake or river are some of the possibilities.

V.2.3.

Cultural attractions

The unique Maori culture is one of New Zealand's attractions. The Maoris never built impressive castles or palaces to attract tourists. The rather small pa's (war-fortresses) can not be compared with the architecture of the Incas. However, the Maori culture is still alive today and therefore a different kind of attraction. Most Maoris live on the North Island, as the climate was much more sympathetic to these Polynesian immigrants. Auckland is the world's biggest

Polynesian city with 70,000 Maoris and 58,000 Pacific Islands immigrants. Other strongholds are the Northland, the East Cape area and the thermal area around Rotorua. In these areas Maoris still own large parts of the land and Maori meeting houses can be seen. Pa's and historic villages can be visited and Maori arts and crafts can be seen in several museums.

Historic sites, such as the Waitangi Treaty House, and historic buildings show the emergence and establishment of the anglophile culture in New Zealand, which after only a few decades became the dominant culture. However, many places still have Maori names and the Maori language is taught in some schools. Several museums show the development of New Zealand since the 19th century. Ghost-towns in various parts of the country are witnesses for gold booms in the last century. Gold mining and panning is still done today, however, mainly by tourists.

With three towns with more than 300,000 people (Auckland, Wellington, and Christchurch) New Zealand offers, despite its low total population size, some urban atmosphere and attractions. Auckland, with its more international flair offers historic buildings and museums along with shopping facilities and a big variety of international restaurants. The tendency of New Zealanders to leave town for the weekend, leaving behind 'deserted' towns and cities, is less distinct in Auckland too.

Besides these major towns, several smaller towns draw tourists. Some are dominantly tourist resorts. The best example is Queenstown, an 'antipodean' St. Moritz. Situated in Central Otago at Lake Wakatipu it provides, besides its scenery, for skiing, trekking, jetboating, white water rafting, and sightseeing cruises.

V.2.4.

Infrastructure

New Zealand features three international airports, Auckland, Wellington, and Christchurch. These have direct flights to Australia and the Southern Pacific. Auckland as the major airport has also direct flights to North-America, Asia, and Europe. Other national airports at Milford Sound, Mount Cook, Nelson, etc., complete the network of airports available for the tourists. The airports at Milford Sound and Mount Cook are especially designed for tourists.

One major railroad crosses New Zealand from north to south, only interrupted by the Cook Strait, with some minor sidelines. However, the railroad does not play a major role in tourist transportation. Buses are a transportation-media often used by tourists and all towns and villages along the major roads are regularly served by bus.

The Cook Strait Ferries connect the North and South Islands. About five ferries a day meet the transportation requirements, except perhaps during high-season. However, the service is sometimes interrupted by strikes, which may lead to long delays.

The road-network is relatively good, especially on the North Island, and the density sufficient. On the South Island there are two major roads in north-south direction, with three roads across mountain passes connecting the Westcoast and Eastcoast. The usual international rent-a-car firms exist in New Zealand and offer their service to the more independent travellers.

There are 21,528 hotel rooms, 12,705 motel units, 3,530 tourist flats and cabins, 5,354 beds in private guest houses and youth hostels, and 23,725 powered campground units that cater to the tourist in New Zealand (New Zealand Official Yearbook 1987/88:325). Personal is often trained in European schools to ensure high quality service. Cooks from all over

Europe can be found working in the same hotel.

Altogether, the infrastructure in New Zealand is relatively good and sufficient, except perhaps for a shortage of high standard accommodations.

V.2.5.

Other Image Attributes

Being situated in the mid-latitudes of the Southern Hemisphere, New Zealand's seasons are opposite to those of the main tourist markets on the Northern Hemisphere, with the inevitable advantages and disadvantages. On one side, it offers a summer-climate for those on the Northern Hemisphere, who may seek a change from the cold winter. On the other hand, New Zealand's winter in the months July and August may hold off potential travellers, who have to take their vacation during those months. However, the latter may change, as more and more people become independent of school holidays, especially those with the financial capabilities to travel to such a distant destination.

New Zealand is politically stable and its dominant culture is similar to the main tourist markets in the world. The cost factor has probably more influence on the choice of New Zealand as tourist destination than the above named. The distance from the main markets poses a financial barrier to some who might otherwise travel. The high initial travel cost also increases the number of 'intervening opportunities', destinations which may offer similar or partly similar attractions, but are cheaper to reach.

The time-barrier has been reduced significantly with today's airplanes, but long flights keep some people from travelling to New Zealand. Increased competition on the long distance flights has led to a reduction of ticket prices during recent years, and thereby may attract more persons

from long distance markets.

The high inflation rate, especially in the area of tourist infrastructure, and the lately relatively stable exchange-rates of the New Zealand dollar against the major currencies, have resulted in a price increase for travelling within the country. Even for the financially well-off travellers of Northern America and Europe, New Zealand is not a cheap destination. The cost factor therefore limits the number of potential travellers from these markets and even more so for other markets.

VI.

Information media of Tourism

The diverse information media are filters, through which a person receives information on the tourism resource base of a destination. These information channels can be broadly divided into four categories: (1) friends and relatives; (2) travel guides; (3) travel agencies; and (4) tv, radio, newspapers and magazines. They are of different importance and credibility to each person. Word of mouth, travel agencies, and newspapers or magazines seemed to be the most important sources of information (Mill and Morrison 1985:20).

Information received from friends or relatives is mainly influenced by their experiences in that destination. As this seems to be a very important information source, the destinations should try to give all visitors a favorable impression. A bias occurs by receiving information from this media as far as previous visitors have a more favorable attitude toward the visited destination, because of social pressure - a spent holiday has to be good.

Travel guides are another source, where a system-imminent bias occurs. Travel guide writers generally tend to highlight the good and positive sides of a destination, because negative travel guides won't sell well. Sometimes their visit to a destination is paid by the host-country and the writers feel obliged to write something favorable.

Travel agents are normally more interested in selling the customer something at all, than in selling a certain destination. Information in tv, radio, magazines, and newspapers can be divided into paid advertisements of tourism agencies, tour operators, carriers, and tourism departments, and general reports of scientific, or general interest. One example of the latter are the reports of Jacques Cousteau, which probably have stimulated some people to start diving or even to travel to some of the mentioned destinations.

VI.1. Oregon Economic Development Department,
Tourism Division

Since 1985, the Tourism Division is part of the Oregon Economic Development Department. It was formerly associated with the State Highway Department. It can trace its origin there to 1935. Besides its head office in Salem there are ten State Welcome Centers, that provide information to interested travellers.

Its biennial budget for July 1989 - June 1991 is 5.5 million US dollars, of which 1.5 million dollars will be used for advertising campaigns. These campaigns are mainly directed toward the markets of California and Washington, with the big spring/summer campaign directed towards the former and the fall/winter towards the latter. Together with the other States of the Pacific Northwest it plans to launch an advertising campaign in the markets of the Midwest and Texas.

Promotion of Oregon is also done in some Pacific Rim countries, Japan, South-Korea, and Taiwan, through the branch offices of the Oregon Economic Development Department in Tokyo, Seoul and Taipei. A future market for promotion will probably be West-Germany in 1990, related to the possible implementation of a direct flight connection by Lufthansa from Frankfurt to Portland.

The main themes of its advertising campaigns are not so much its tourist attractions, but rather a description of Oregon as a whole - the State's lifestyle and why Oregon is different. 'Things look different here' was the main slogan of the spring/summer campaign 1989.

VI.2. New Zealand Tourist and Publicity Department

"Tracing it's origin to 1901, the Tourist and Publicity Department is the oldest national tourist office in the world" (New Zealand Official Yearbook 1985:290). It has offices not only in 6 domestic locations, but also 15 offices in 9 countries overseas, Australia, Singapore, Hong Kong, Canada, U.S.A., United Kingdom, West-Germany, and Argentina.

Although it is almost 90 years old, it has been only for the last three decades on the offensive track in promoting New Zealand as tourist destination, for example with the 'Discover New Zealand' campaign in 1981/82. During the first 60 years it was mainly engaged in running its own travel agency, tour operation, and power plant (Clement 1961:178).

In the 1980's the Tourist Department has been active on all major tourism markets, North-America, Japan, Europe, and Australia in promoting New Zealand as a travel destination. A tv-spot 'the two most beautiful islands' was running on channels in the United States in 1989. In Japan, New Zealand is promoted as a honeymoon destination (Coventry 1984:66). The Tourist Department adjusts its promotion strategy to the different markets (NZTPD 1989a) to increase the effectiveness of its campaigns. Its annual budget was 90 million NZ dollars (53 million US dollars) in 1988, of which 35 million NZ dollars (20 million US dollars) were allocated to overseas marketing (NZTPD 1988:2). This indicates the emphasis the Tourism Department lays on marketing to increase the volume of visitor flow to New Zealand.

Some themes are common in advertising in the different markets - New Zealand as an unspoiled and safe vacation destination with spectacular scenery and friendly people.

VI.3. A Comparison of Travel Guides

Two travel guides for each destination were used to measure the importance of 18 different themes in the presentation of both destinations in the travel guide literature. Nine themes belonged to the broad spectrum of natural and associated attractions, while the other nine could be classified as cultural attractions in the broadest sense (Table 1).

New Zealand's natural attractions accounted for 39 per cent and cultural attractions for 61 per cent in both travel guides combined. The figures were 47 per cent and 52.7 per cent respectively for Oregon. Two scenarios are possible to explain this difference. Either Oregon's natural attractions are more noteworthy, or its cultural attractions are not comparable to those of New Zealand.

There existed also a difference between the two brands of travel guides. The Sunset Guides placed more emphasis on natural attractions than the APA Guides, but in similar proportions for both destinations. While New Zealand's natural attractions covered 46.2 per cent in the Sunset Guide, only 34.2 per cent of the APA Guide were dedicated to them. The figures for Oregon were 53.8 per cent and 41.3 per cent respectively.

Except for scenery, mountains and coast, Oregon's natural attractions had a higher percentage than New Zealand's. For most cultural attractions New Zealand was leading, except for historical attractions and information. Noteworthy is, that the image attribute 'friendly people' was not mentioned at all in Oregon's travel guides, while .5 per cent of New Zealand's travel guides were dedicated to it.

The greatest differences occurred for historical (22.7% versus 13.5%), cultural (8.2% - 18.1%), and urban attractions (12.0% - 17.8%) for Oregon and New Zealand respectively. With

Table 1: Frequency of 18 themes in the Sunset and APA Travel Guides of Oregon and New Zealand (in %)

Themes	Oregon			New Zealand		
	Sunset	APA in %	Total	Sunset	APA in %	Total
Climate	.6	3.2	1.9	.6	1.0	.8
Scenery	16.4	11.3	13.7	17.4	13.2	14.9
Mountains	.5	.9	.7	2.0	.5	1.1
Coast	2.3	2.3	2.3	3.5	1.7	2.4
Wildlife	2.6	3.6	3.1	1.4	1.6	1.5
Lakes/Rivers	3.7	3.6	3.6	2.4	1.2	1.7
Geologic	3.8	7.4	5.6	2.0	4.6	3.6
Vegetation	2.3	1.6	1.9	2.3	1.3	1.7
Outdoor-recr.	21.6	7.4	14.2	14.6	9.1	11.3
	----	----	----	----	----	----
Natural attr.	53.8	41.3	47.0	46.2	34.2	39.0
Friendly people	-	-	-	1.1	-	.5
Historical attr.	15.4	29.6	22.7	7.8	17.4	13.5
Cultural attr.	6.3	10.0	8.2	7.6	25.2	18.1
Urban attr.	13.0	11.0	12.0	19.0	17.1	17.8
Infrastructure	6.9	3.3	5.0	12.1	3.3	6.8
Food/Drink	.3	2.3	1.3	1.7	1.3	1.5
Information	4.4	.3	2.3	3.5	.1	1.5
Cost of travel	-	-	-	-	-	-
Miscellaneous	-	2.4	1.2	.9	1.5	1.3
	----	----	----	----	----	----
Cultural attr.	46.3	58.9	52.7	53.7	65.9	61.0
	----	----	----	----	----	----
Total	100.1	100.2	99.7	99.9	100.1	100.0

22.7 per cent historical attractions were also the most extensively covered theme in Oregon's travel guides, referring mainly to the exploration of Oregon, early settlement, Lewis and Clark, and the Oregon trail. Outdoor-recreation (14.2%) and scenery (13.7%) followed as next important themes.

About 18 per cent of New Zealand's travel guides were dedicated to cultural attractions, primarily the Maori culture. Second with 17.8 per cent were urban attractions with scenery (14.9%) a running third (Table 1).

VII. The Perceptions of Oregon and New Zealand as Tourist Destinations

How is a tourist destination perceived by the population in the market? What makes a destination famous? Is it just the attractions or does a 'trade-name' exist in tourism too? Is perhaps the 'trade-name' much more important?

Not everybody perceives a destination in the same way. For one person Hawaii might be the 'dream-destination', for another Hawaii would be the last place to visit. The differences in perception are due to several factors, including different amounts and quality of information received, different sensitivity to this information, and different personalities and experiences.

The amount and quality of information a person receives varies according to the person's relatives, friends, and acquaintances, but also to the newspapers, magazines, and books the person reads. Individuals also differ in the degree to which they look for and seek information.

The second factor, sensitivity, is actually a necessary filter in today's world. With the growing information overload, which came along with new information media techniques, each person has developed a filter through which only the most interesting information is actively received. This is also true in the tourism sector. A fanatic rock-climber, for example, might have access to information on a beach holiday destination, but he won't even consider it as a potential tourist destination and therefore will neglect this information. This may change over time, as the interests of the person change over time.

The individual personality plays a major role in the perception building process. Factors such as previous experiences and motivations lead a person towards building an individual perception of a destination. Knowingly or

unknowingly each person is constructing his/her own perception, and is adding each new piece of information to it. Therefore these perceptions may change over time. Active public relation by Official Tourist Departments may be one way in which individual perceptions are changed. Generally, however, only a few destinations are considered by each person, when deciding on a destination for this years holiday, and not the great variety on today's travel market (Woodside and Lysonski 1989). The present study only dealt with the perceptions of Oregon, New Zealand, and California, as these perceptions existed at the time of survey.

As mentioned in section III, a survey was conducted at Frankfurt airport, Federal Republic of Germany. Besides general questions regarding age, sex, and profession, questions were asked about travel experience, travel expenditure, and travel destination attribute preferences. The main focus of this survey was on questions regarding previous experiences with one of the mentioned destinations, and a ranking of these destinations with respect to 12 image attributes on a semantic differential scale from 1 to 7 (Appendix). A 1 indicated a very good perception, while the 7 stood for a very poor perception of the respective image attribute.

The purpose of this survey was to show possible differences in perceptions of Oregon and New Zealand, and differences in perceptions between the various nationalities.

VII.1. A survey at Frankfurt Airport, FRG

On five days, September 4-8, 1989, 400 persons were approached in the airport and asked to fill out a self-administered questionnaire. Of these 400 only 36 declined,

mostly due to lack of time and language barriers. Of the 364 questionnaires obtained, another 9 were not completely filled out, leaving a total of 356 as the sample population of this survey.

208 or 58.4 per cent were male and 148 (41.6%) female. This bias was probably due to the higher percentage of male business travellers. West-Germans made up 52.2 per cent of the sample, 22.8 per cent were U.S.-Americans, 6.7 per cent were Canadians, and 18.3 per cent were from other places. Of the latter, 13 were from Austria, 9 from South-Africa, and 7 originated in the United Kingdom (Table 2).

The age distribution indicated an overrepresentation of the younger age-groups - 160 (44.9%) were between 20 and 29 years old. However, this was partly due to an overrepresentation of this age-group at the time of survey, probably caused by the end of the main tourist season. School-holidays were over and only people without time restriction were able to travel. Another reason was the higher cooperation of this age-group. All of those, who declined to fill out a questionnaire belonged to older age-groups. Table 3 shows age distribution as related to sex, and indicates that the bias toward males in this sample was concentrated in the age-groups 30-39 and 40-59 (Table 3).

Sixtythree more male than female persons stated business as one of their main reasons for travel abroad (Table 4). This was about the same difference as males were overrepresented in the survey and in the age-groups 30-39 and 40-59. Business ranked second as a reason to travel abroad as stated by the surveyed population. Holiday was named by 74.4 per cent and visiting friends/relatives by 28.4 per cent as one of their reasons to travel abroad (multiple choice was possible). Travel for conventions, conferences, private or personal affairs, and for other reasons did not seem to be important.

Table 2: Country of origin and sex of sample population

Country	Male	Female	Total	%
West-Germany	114	72	186	52.2
United States	46	35	81	22.8
Canada	10	14	24	6.7
	-----	-----	-----	-----
North-America	56	49	105	29.5
Austria	7	6	13	
United Kingdom	4	3	7	
Hungary	3	2	5	
Netherlands	3	1	4	
France	-	4	4	
CSSR	2	2	4	
Belgium	2	-	2	
Italy	2	-	2	
Norway	1	1	2	
Sweden	-	1	1	
Denmark	1	-	1	
Switzerland	1	-	1	
Portugal	-	1	1	
Yugoslavia	1	-	1	
Greece	1	-	1	
East-Germany	1	-	1	
Poland	1	-	1	
	-----	-----	-----	-----
Other European	30	21	51	14.3
South-Africa	6	3	9	
Australia	1	1	2	
Syria	1	1	2	
Peru	-	1	1	
	-----	-----	-----	-----
Other World	8	6	14	3.9
	-----	-----	-----	-----
Total Other	38	27	65	18.3
	-----	-----	-----	-----
Total	208	148	356	100.0%

Table 3: Age and sex distribution of sample population

Age-group	Male	Female	Total	% of sample
under 19	9	9	18	5.1%
20 - 24	41	40	81	22.8%
25 - 29	42	37	79	22.2%
30 - 39	54	29	83	23.3%
40 - 60	59	26	85	23.9%
above 60	4	6	10	2.8%
	<u>208</u>	<u>148</u>	<u>356</u>	<u>100.1%</u>

Table 4: Main reasons for travelling abroad (multiple choice was possible)

Reasons	Male	Female	Total	% of sample
vacation	141	124	265	74.4%
visit friends/relatives	45	56	101	28.4%
business	96	33	129	36.2%
conference/convention	12	4	16	4.5%
personal/family affairs	10	11	21	5.9%
other	9	7	16	4.5%
	<u>312</u>	<u>235</u>	<u>547</u>	<u>153.7%</u>

The frequency of trips abroad revealed a high international mobility for the sample. The peaks of the frequency distribution were those who travelled once each year (27.8%) and those who travelled more than three times each year (26.1%) abroad. Almost 79 per cent of the sample travelled at least once each year and still more than 50 per cent at least twice each year (Table 5). West-Germans and persons of other origin were travelling more frequently abroad than North-Americans (Table 6). This is explained by the large size of Canada and the United States, offering a multitude of different tourist regions and attractions within one country.

About 79 per cent of the sample population had travelled to a destination in Western Europe within the last two years and 49 per cent to a destination in North-America. This may not be a surprise, as almost 93 per cent were of either Western European or North-American origin. However, also almost 28 per cent had travelled to Eastern Europe, 22 per cent to Asia, and more than 16 per cent to Latin-America. Only 5 per cent had travelled to Austral-Oceania, which ranked last (Table 7). There existed some differences between the different areas of origin too (Table 8).

The average yearly expenditure on travelling was 5800 DM, or 3000 US dollars (using an exchange rate of 1.93 DM = 1 US dollar). The averages for males and females were 6300 DM and 5100 DM (3260 and 2640 US dollars) respectively. The higher percentage of male business travellers may be cause for this difference. In general, the surveyed population seemed to be frequent, international travellers with enough money at hand for travelling.

Question 7 of this survey asked for a ranking of 14 image attributes, on a scale from 1 to 7, with respect to their importance to the person's destination-choice. A grading of 1 meant very important and a 7 meant unimportant.

Table 5: Frequency of trips abroad

Frequency	Male	Female	Total	% of sample
never	4	3	7	2.0%
every 3 years	16	12	28	7.9%
every second year	22	17	39	11.0%
once each year	53	46	99	27.8%
twice a year	40	22	62	17.4%
three times a year	16	11	27	7.6%
more than 3 times	57	36	93	26.1%
	<u>208</u>	<u>148</u>	<u>356</u>	<u>99.8%</u>

Table 6: Frequency of trips abroad by nationality (in %)

Frequency	FRG	North-America	Other	All
never	.5	3.8	3.1	2.0
every 3 years	2.7	17.1	7.7	7.9
every second year	9.7	15.2	7.7	11.0
once each year	32.3	24.8	20.0	27.8
twice a year	19.9	14.3	15.4	17.4
three times a year	9.7	4.8	6.2	7.6
more than 3 times	25.3	18.1	40.0	26.1
	-----	-----	-----	-----
	100.1	100.1	100.1	99.8

Table 7: Visited regions during last two years

Region	Absolute	% of sample
Western Europe	280	78.7
North-America	175	49.2
Eastern Europe	99	27.8
Asia	79	22.2
Africa	59	16.6
Middle-/South-America	49	13.8
Austral-Oceania	18	5.1
	-----	-----
	759	213.4

Table 8: Visited regions during last two years by origin
(in %)

Region	FRG	North-America	Other	All
Western Europe	75.3	80.0	86.2	78.7
North-America	38.2	64.8	55.4	49.2
Eastern Europe	27.4	25.7	32.3	27.8
Asia	28.5	10.5	23.1	22.2
Africa	18.3	14.3	15.4	16.6
Central-/South-Amer.	14.0	11.4	16.9	13.8
Austral-Oceania	7.0	-	9.2	5.1
	-----	-----	-----	-----
	208.7	206.7	218.5	213.4

The average ranking of the 14 image attributes was 3.29 and the average for males and females was identical. Scenery ranked first, with an average of 2.13, followed by friendly people 2.26, climate 2.78, and outdoor-recreation 2.91. At the bottom were infrastructure 4.27, wildlife 3.89, urban attractions 3.74, and mountains 3.71. The low rating for infrastructure probably represents a failure to understand the term as a reference to accommodation and facilities in general. The grading of the various image attributes varied slightly between the sexes (Table 9). Scenery and friendly people were also ranked first and second in another study of the importance of image attributes (Goodrich 1978).

The average grades and the ranking also varied between countries or regions of origin (Figure 4). It is interesting that for the North-American sample historical and cultural attractions were third and fourth most important image attributes in their choice of a travel destination, while they ranked lower for the West-German and other sample. Historical and cultural attractions are some of the main reasons for North-Americans to travel to Europe.

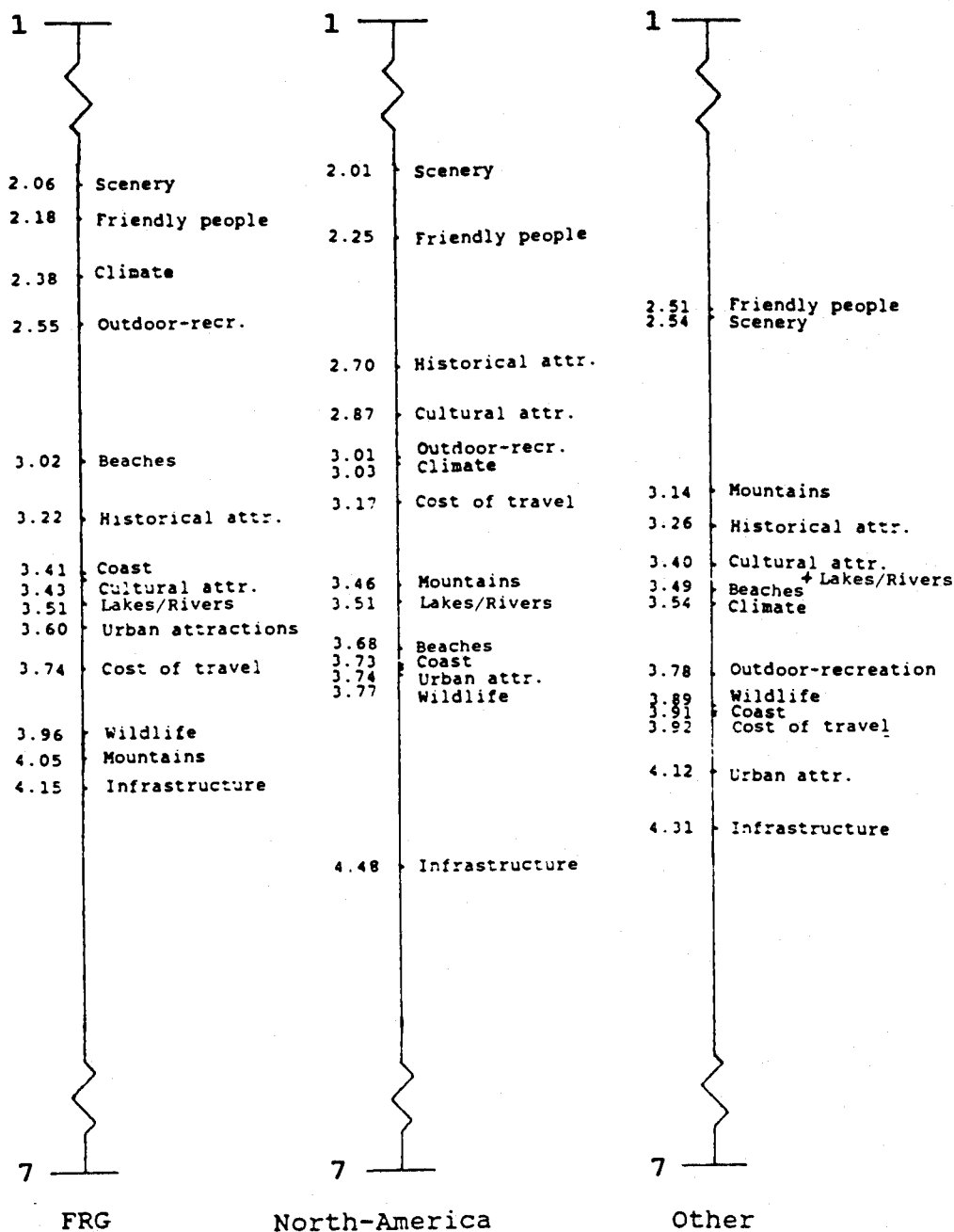
Question 13 asked for a ranking of 12 destinations according to their preference, if the respondent had the time and money to travel to any one. Besides Oregon and New Zealand 10 destinations were chosen, because of their relative distance from Frankfurt, FRG, and to offer a wide range of different tourist destinations in terms of region and attractions. Australia was chosen for Austral-Oceania, California and Florida for North-America, Mexico and Brazil for Latin-America, Kenya and South-Africa for Africa, and Japan, Nepal and Indonesia for Asia. This question was designed to show the relative competitiveness of Oregon and New Zealand with international tourist destinations.

Australia was a clear first, with an average rank of 3.75, and New Zealand second with 4.72. California at 5.71,

Table 9: Average importance of image attributes in destination-choice

Image attribute	Male	Female	Total	Rank
Scenery	2.29	1.91	2.13	1.
Friendly people	2.23	2.31	2.26	2.
Climate	2.96	2.53	2.78	3.
Outdoor-recreation	3.06	2.70	2.91	4.
Historical attractions	3.08	3.06	3.07	5.
Cultural attractions	3.27	3.24	3.26	6.
Beaches	3.29	3.31	3.30	7.
Lakes and rivers	3.40	3.61	3.49	8.
Coast/Coastline	3.65	3.51	3.60	9.
Cost of travel	3.66	3.53	3.61	10.
Mountains	3.65	3.79	3.71	11.
Urban attractions	3.65	3.86	3.74	12.
Wildlife	3.68	4.19	3.89	13.
Infrastructure	4.13	4.47	4.27	14.
Average	3.29	3.29	3.29	

Figure 4: Average importance of 14 image attributes in destination choice by different area of origin (on a semantic differential scale from 1 <very important> to 7 <unimportant>)



Japan at 5.89, and Brazil at 5.97 followed. Oregon ranked last with 8.28, behind South-Africa and Kenya with 8.21 and 7.67 respectively (Table 10). There was some variation between the ranking by West-Germans, North-Americans and others, even though Australia always ranked first (Figure 5).

The main purpose of this survey was to record the existing perceptions of the destinations Oregon and New Zealand by the sample population. As mentioned above, perception is one of the main factors in the destination-choice process. In theory, a favorable perception of a destination raises the likelihood that a person will travel to that positively perceived destination, while a negative perception keeps the same person from travelling there.

Only a small percentage of the respondents had ever visited New Zealand (3.4%), while a comparable high percentage had visited Oregon (19.4%). A majority of persons (52.8%) had been to California (Table 11). California, an internationally well known and visited destination was included, to give a comparison of the quantitative result for both destinations.

The sample population was asked to rank all three destinations on a scale from 1 to 7 with respect to 12 different image attributes. New Zealand received an average grade of 2.85, better than Oregon's 3.30. However, California, in comparison, was perceived better still with 2.71. Except for infrastructure and cost of travel, New Zealand ranked better in all image attributes. The latter is probably due to cheaper airfares to the United States, compared with New Zealand. Both destinations received generally better scores for their natural attractions than for the various cultural attractions. Scenery ranked first with both, however, New Zealand's scenery received an average grade of 1.52, while Oregon's scenery got 2.44 (Figure 6, Table 12).

Table 10: Average ranking of 12 international tourist destinations

Destination	Male	Female	Total	Rank
Australia	3.65	3.85	3.74	1.
New Zealand	4.60	4.91	4.72	2.
California	5.73	5.68	5.71	3.
Japan	5.65	6.22	5.89	4.
Brazil	6.16	5.70	5.97	5.
Mexico	7.10	6.31	6.77	6.
Florida	6.73	6.96	6.82	7.
Indonesia	7.05	6.91	6.99	8.
Nepal	7.13	7.15	7.14	9.
Kenya	7.73	7.57	7.67	10.
South-Africa	8.37	8.00	8.21	11.
Oregon	7.94	8.76	8.28	12.

Figure 5: Average ranking of 12 international tourist destinations by area of origin

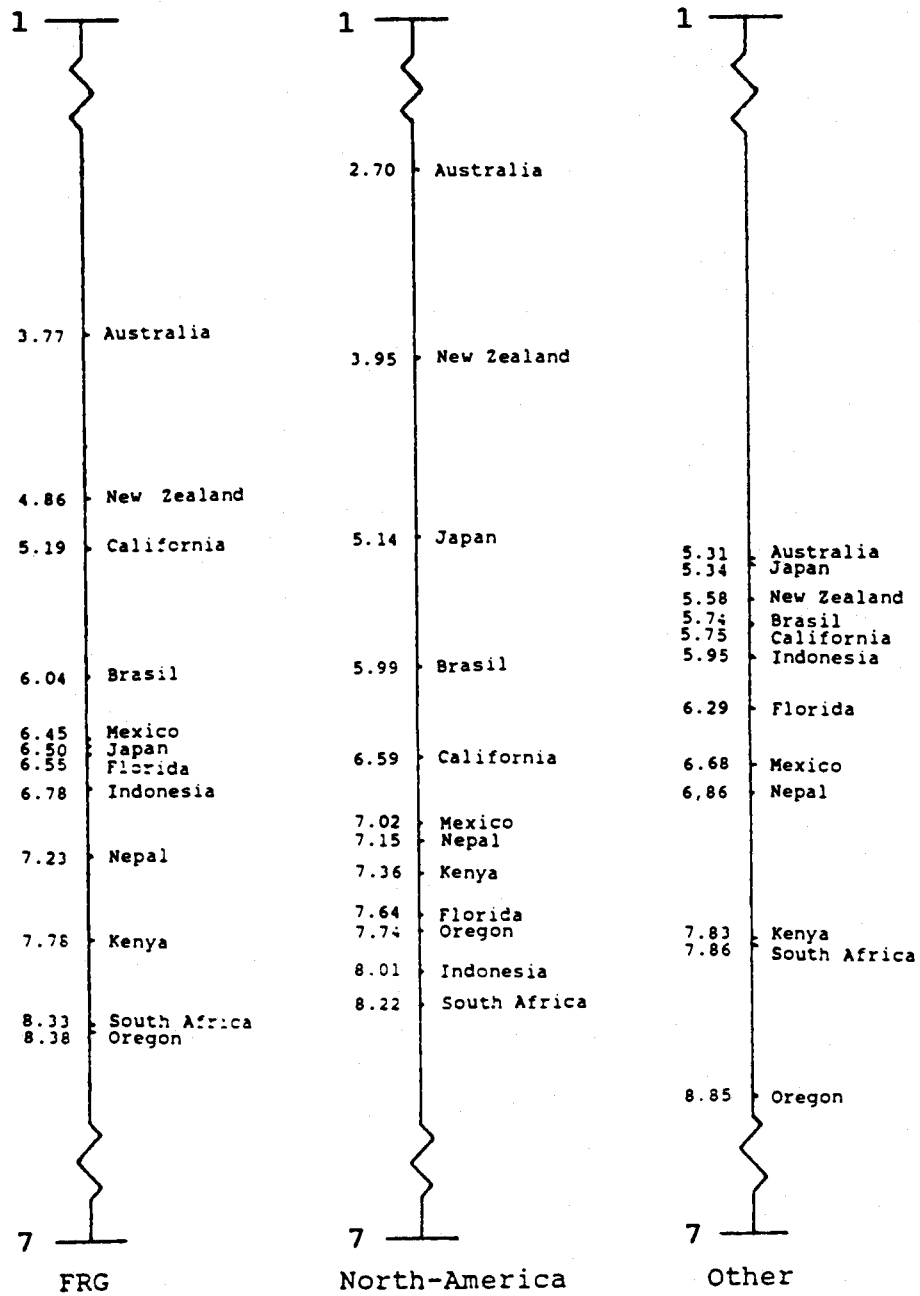


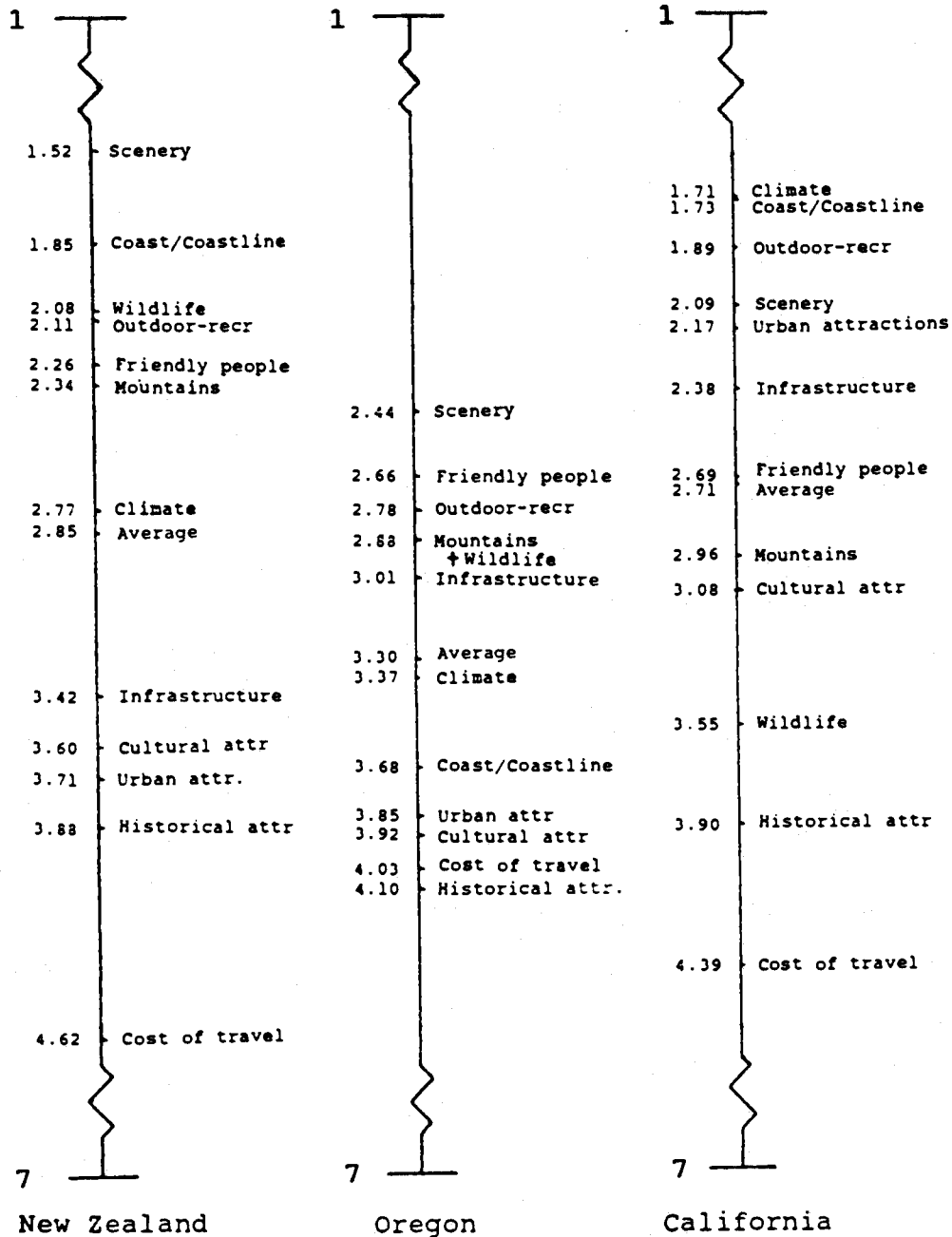
Table 11: Familiarity of sample with the destinations
California, Oregon, and New Zealand through
previous visit by area of origin

Destination	FRG	North-America	Other	Total	%
None	114	23	29	166	46.6
California	70	80	36	188	52.8
Oregon	16	43	10	69	19.4
New Zealand	6	5	1	12	3.4

Table 12: Average scores of New Zealand, Oregon, and
California with respect to 12 image attributes

Image attribute	New Zealand	Oregon	California
Climate	2.77	3.37	1.71
Scenery	1.52	2.44	2.09
Mountains	2.34	2.88	2.96
Coast/Coastline	1.85	3.68	1.73
Wildlife	2.08	2.88	3.55
Outdoor-recreation	2.11	2.78	1.89
Friendly people	2.26	2.66	2.69
Historical attractions	3.88	4.10	3.90
Cultural attractions	3.60	3.92	3.08
Urban attractions	3.71	3.85	2.17
Infrastructure	3.42	3.01	2.38
Cost of travel	4.62	4.03	4.39
	2.85	3.30	2.71

Figure 6: Average perceptions of Oregon, New Zealand, and California with respect to 12 image attributes (on a semantic differential scale from 1 <very good> to 7 <very poor>)



The difference between New Zealand and Oregon, with respect to the image attributes, were significant at the 95% confidence interval, except for historical and urban attractions (Table 13, Figure 7). New Zealand's scores for scenery, wildlife, friendly people, mountains, and historic attractions were better compared to California, while Oregon's scores for mountains, wildlife, and cost of travel were better, and the score for friendly people was equal to California. It is interesting to note, that the 'famous' Oregon Coast was perceived only with an average of 3.68, compared to California and New Zealand with 1.73 and 1.85 respectively.

The average perception of New Zealand by West-Germans and North-Americans was almost equal with 2.78 and 2.82 respectively, while it was 3.05 for persons of other origin. The main difference between persons of the two former were outdoor-recreation 1.84 and 2.40 respectively, and cost of travel with 4.97 and 4.04 respectively (Table 14). The latter may be caused by the better exchange value for the US and Canadian dollar, than for the German Mark.

The lower grade for historical attractions by the West-German sample is probably based on a different perception of history. The 200 years since the discovery of New Zealand by Captain Cook is a relatively short period in history for Europeans in general, and West-Germans in particular, compared with the historic attractions of the Roman and Greek Empires for example. This also shows in the 4.69 grade average by persons of other - mainly European - origin.

The average perception of Oregon was highest by North-Americans 3.11, followed by West-Germans 3.31, and other countries 3.57. North-Americans perceived mountains 2.34, coast 2.88, and cost of travel 3.19 more favorable than West-Germans, who gave grades of 3.23, 3.98, and 4.45 respectively. On the other hand, climate 3.05 and urban

Table 13: Average scores and 95 per cent confidence intervals
of New Zealand's and Oregon's image attributes

Image attribute	New Zealand	Oregon
Climate	2.64 - 2.90	3.23 - 3.51
Scenery	1.43 - 1.61	2.30 - 2.58
Mountains	2.20 - 2.48	2.72 - 3.04
Coast/Coastline	1.74 - 1.96	3.45 - 3.91
Wildlife	1.95 - 2.21	2.72 - 3.04
Outdoor-recreation	1.98 - 2.24	2.62 - 2.94
Friendly people	2.13 - 2.39	2.53 - 2.79
Historical attractions	3.71 - 4.05	3.93 - 4.27
Cultural attractions	3.44 - 3.76	3.78 - 4.06
Urban attractions	3.54 - 3.87	3.69 - 4.01
Infrastructure	3.28 - 3.56	2.88 - 3.14
Cost of travel	4.44 - 4.80	3.87 - 4.19

Figure 7: Average perceptions and 95% confidence intervals of Oregon and New Zealand with respect to 12 image attributes

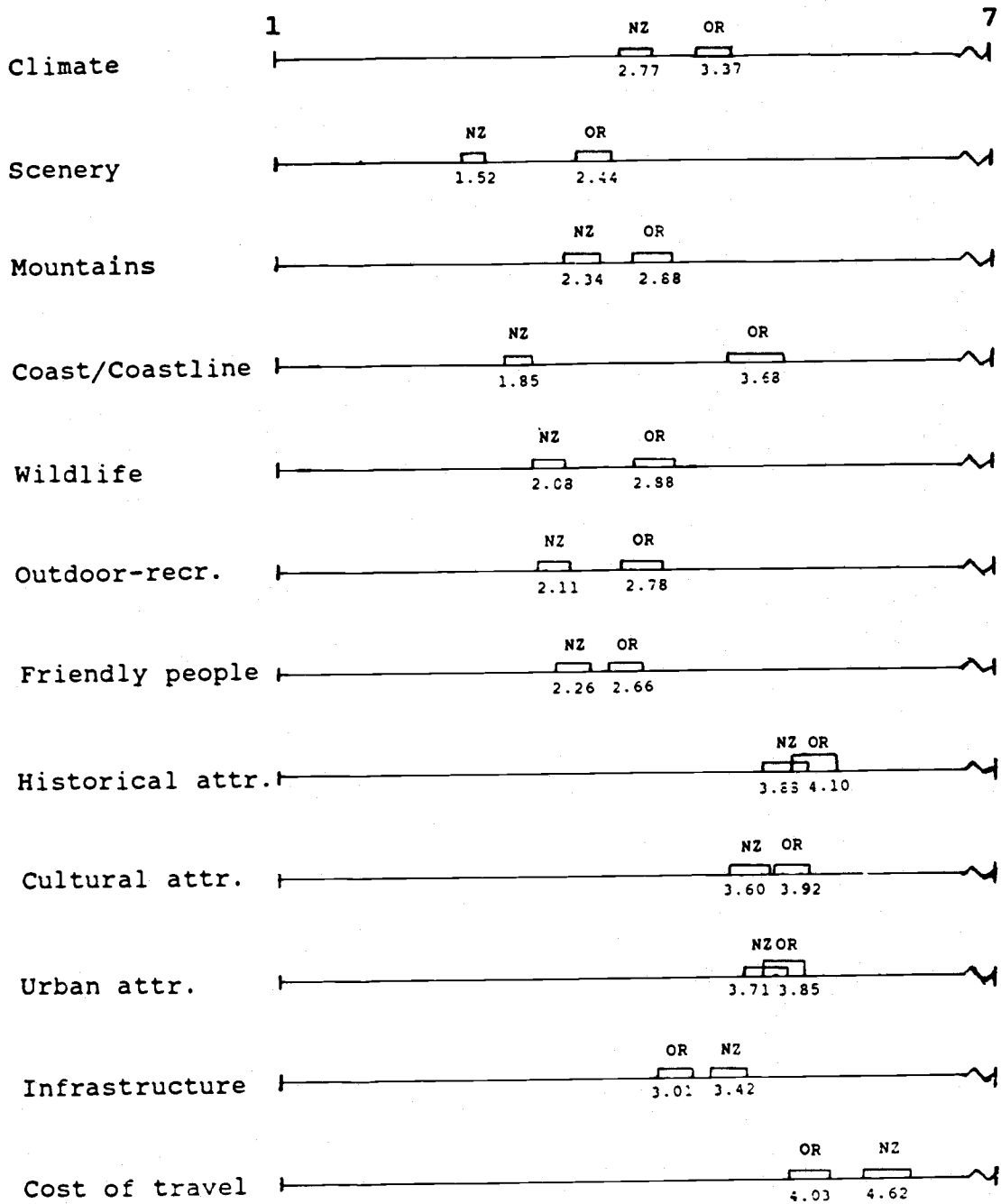


Table 14: Average scores of New Zealand's image attributes by area of origin

Image attribute	FRG	North-America	Other	All
Climate	2.60	2.95	2.97	2.77
Scenery	1.42	1.56	1.72	1.52
Mountains	2.17	2.65	2.32	2.34
Coast/Coastline	1.79	1.88	2.00	1.85
Wildlife	1.99	2.05	2.37	2.08
Outdoor-recreation	1.84	2.40	2.40	2.10
Friendly people	2.29	2.15	2.37	2.26
Historical attractions	3.87	3.45	4.69	3.88
Cultural attractions	3.55	3.30	4.22	3.60
Urban attractions	3.44	3.87	3.95	3.71
Infrastructure	3.48	3.49	3.06	3.42
Cost of travel	4.97	4.04	4.57	4.62
	<u>2.78</u>	<u>2.82</u>	<u>3.05</u>	<u>2.85</u>

Table 15: Average scores of Oregon's image attributes by area of origin

Image attribute	FRG	North-America	Other	All
Climate	3.05	3.80	3.55	3.37
Scenery	2.53	2.05	2.78	2.44
Mountains	3.23	2.34	2.74	2.88
Coast/Coastline	3.98	2.88	4.11	3.67
Wildlife	3.04	2.64	2.83	2.88
Outdoor-recreation	2.47	2.80	3.65	2.78
Friendly people	2.67	2.43	2.98	2.66
Historical attractions	4.06	3.92	4.51	4.10
Cultural attraction	3.76	3.96	4.31	3.92
Urban attractions	3.61	4.10	4.14	3.85
Infrastructure	2.85	3.22	3.11	3.01
Cost of travel	4.45	3.19	4.17	4.03
	<u>3.31</u>	<u>3.11</u>	<u>3.57</u>	<u>3.30</u>

attractions 3.61 were perceived better by West-Germans, compared to 3.80 and 4.10 respectively for North-Americans (Table 15). The difference in perception of cost of travel is probably based on the distance of Oregon from West-Germany, and therewith resulting higher costs to reach Oregon.

The West-German sample was broken down into three categories of different degree of familiarity with the destinations Oregon, New Zealand and California (Table 16). The first subsample was constituted by those 114 persons, who had never to any of these destinations. The second consisted of those 52 persons who had been only to California, and the remaining 20 had been either to Oregon or New Zealand or any combination of the mentioned three destinations. Only 6 out of these 20 were familiar with New Zealand, while 16 had been to Oregon. Prior to the discussion of the differences and similarities between these three subsamples, it has to be recalled, that the grading of these destinations was not only a quantitative one for each destination, but also a qualitative one, as the grading was done also in a comparative way.

The first (2.76) and the second subsample (2.79) perceived New Zealand similarly, although same differences existed with respect to most image attributes. The main difference was the more positive perception of cost of travel by the second subsample. The third subsample had an average perception of 2.93, worse than the others. Cost of travel was the only image attribute which the third subsample perceived in a more positive manner (Table 17).

The average perceptions for Oregon were 3.34 by the first, 3.23 by the second, and 2.96 by the third subsample. Almost all image attributes were perceived better by the second and third subsample compared with the first. The only exception was urban attraction by both, historical by the

Table 16: Breakdown of West-German sample by different grade of familiarity with the destinations Oregon, New Zealand, and California

	Male	Female	All	%
None	66	48	114	61.3
only California	35	17	52	28.0
only Oregon	1	1	2	
Oregon & California	8	4	12	
Oregon & New Zeal. & Calif.	2	-	2	
New Zealand & California	2	2	4	
	--	--	--	
	13	7	20	10.8
	<u>114</u>	<u>72</u>	<u>186</u>	<u>100.1</u>

Table 17: Average scores of New Zealand's image attributes by different familiarity of West-German sample with the the destinations Oregon, New Zealand, and California

Image attribute	#	Previous visits to			Total
		None	only California	other combinations	
		114	52	20	186
Climate		2.54	2.73	2.75	2.60
Scenery		1.39	1.48	1.45	1.42
Mountains		2.10	2.21	2.10	2.17
Coast/Coastline		1.74	1.83	2.00	1.79
Wildlife		1.87	2.23	2.10	1.99
Outdoor-recreation		1.89	1.71	1.75	1.84
Friendly people		2.24	2.19	2.80	2.29
Historical attractions		3.89	3.85	4.05	3.87
Cultural attractions		3.48	3.48	4.15	3.55
Urban attractions		3.62	3.44	3.85	3.44
Infrastructure		3.60	3.25	3.70	3.48
Cost of travel		5.17	4.67	4.50	4.97
		----	----	----	----
		2.79	2.76	2.93	2.78

second and infrastructure by the third. The difference between the first and third subsample was considerable, for cost of travel +1.2, friendly people +.53, outdoor-recreation +.63, mountains +.79 and scenery +.61 (Table 18).

The higher familiarity with the destinations California, Oregon and New Zealand seemed to make a significant difference in the perception of Oregon, while New Zealand's image attributes, except for cost of travel, were not perceived more favorably. Oregon's and New Zealand's average perception was almost identical by the third subsample. However, the size of this subsample may not be enough to give a significant result. The fact, that of these 20 persons 10 more had been to Oregon than to New Zealand may have had an influence on the result too, as the scoring was also comparative. A comparison with the results for California showed that California was also perceived better by the second and third subsample compared with the first for most image attributes and on overall average (Table 19).

Another breakdown was done with the North-American sample - California 24, other U.S. 57, and Canada 24 (Table 20). There did not exist much difference with respect to New Zealand's overall perception. Canadians and Californians perceived New Zealand slightly better than did other U.S.-Americans (Table 21). Oregon's overall perception showed differences between those from California (2.92) and from Canada (3.36). Except for urban attractions, Californians perceived all image attributes of their neighboring state as better than the North-American average. Other U.S.-Americans perceived most image attributes better, while Canadians perceived most worse than the North-American average. The greatest difference occurred with coast/coastline, which Canadians perceived on average as less favorable (3.88) than Californians (2.25) (Table 22).

Table 18: Average scores of Oregon's image attributes by different familiarity of West-German sample with the destinations Oregon, New Zealand, and California

Image attributes	#	Previous visits to			Total
		None	only California	other combinations	
		114	52	20	186
Climate		3.11	3.02	2.80	3.05
Scenery		2.61	2.56	2.00	2.53
Mountains		3.34	3.27	2.55	3.23
Coast/Coastline		4.11	3.71	2.75	3.98
Wildlife		3.14	2.96	2.70	3.04
Outdoor-recreation		2.63	2.31	2.00	2.47
Friendly people		2.83	2.50	2.30	2.67
Historical attractions		4.02	4.19	4.00	4.06
Cultural attractions		2.93	3.71	3.65	3.76
Urban attractions		3.52	3.69	3.90	3.16
Infrastructure		2.89	2.71	3.05	2.85
Cost of travel		4.90	4.12	3.85	4.45
		----	----	----	----
		3.34	3.23	2.96	3.31

Table 19: Average scores of California's image attributes by different familiarity of West-German sample with the destinations Oregon, New Zealand, and California

Image attribute	#	Previous visits to			Total
		None	only California	other combinations	
		114	52	20	186
Climate		1.61	1.56	1.90	1.63
Scenery		2.23	1.62	1.80	2.01
Mountains		3.22	2.75	2.95	3.06
Coast/Coastline		1.86	2.06	1.35	1.86
Wildlife		3.30	3.48	3.30	3.35
Outdoor-recreation		1.90	1.62	1.60	1.79
Friendly people		2.66	2.17	2.10	2.46
Historical attractions		4.02	4.00	3.65	3.97
Cultural attractions		3.36	3.02	3.00	3.23
Urban attractions		2.18	2.10	1.85	2.12
Infrastructure		2.20	2.04	1.90	2.12
Cost of travel		4.86	4.83	4.35	4.80
		----	----	----	----
		2.78	2.60	2.48	2.70

Table 20: Familiarity of North-American sample with the destinations Oregon, New Zealand and California by origin

Destination	Canada	U.S.A.		Total
	# 24	California # 24	Other # 57	# 105
None	9	-	14	23
California	15	24	42	81
Oregon	8	16	19	43
New Zealand	2	2	1	5

Table 21: Average scores of New Zealand's image attributes by North-Americans

Image attribute	Origin			Total
	U.S.A. California # 24	Other 57	Canada 24	105
Climate	2.96	3.02	2.58	2.95
Scenery	1.63	1.54	1.54	1.56
Mountains	2.67	2.65	2.63	2.65
Coast/Coastline	2.21	1.84	1.63	1.88
Wildlife	1.96	2.11	2.00	2.05
Outdoor-recreation	2.46	2.40	2.33	2.40
Friendly people	2.21	2.32	1.71	2.15
Historical attractions	3.50	3.14	3.75	3.45
Cultural attractions	2.79	3.53	3.29	3.30
Urban attractions	4.08	3.96	3.42	3.87
Infrastructure	3.29	3.44	3.79	3.49
Coast of travel	3.25	4.40	3.96	4.04
	----	----	----	----
	2.75	2.86	2.72	2.82

Table 22: Average scores of Oregon's image attributes by North-Americans

Image attributes	Origin and number			Total	
	#	U.S.A.			Canada
		California	Other		
	#	24	57	24	105
Climate		3.83	3.89	3.88	3.80
Scenery		1.75	1.96	2.54	2.05
Mountains		2.08	2.18	3.00	2.34
Coast/Coastline		2.25	2.72	3.88	2.88
Wildlife		2.42	2.56	3.04	2.64
Outdoor-recreation		2.50	2.88	2.92	2.80
Friendly people		2.33	2.54	2.25	2.43
Historical attractions		3.79	3.82	4.29	3.92
Cultural attractions		3.79	3.98	4.08	3.96
Urban attractions		4.25	4.21	3.71	4.10
Infrastructure		2.96	3.14	3.71	3.22
Cost of travel		3.04	3.33	3.00	3.19
		----	----	----	----
		2.92	3.09	3.36	3.11

VIII. The Actual Travel Pattern

The actual travel pattern describes the existing tourism at a destination. How many tourists, where they came from, how long they stay and how much do they spend - these questions will be the focus of this section.

VIII.1. Oregon

VIII.1.1 Number of Out-of-State Visitors

As mentioned above (III.), it is relatively difficult in Oregon to arrive at exact figures for the number of tourists, and it can be at most an estimate. This is probably the reason for the differences between the following two sources. Runyan arrived at a figure of 6.04 million out-of-state visitors to Oregon in the year 1987 (Runyan 1989: 136). This figure was derived by dividing the total expenditure for the whole year with the average daily expenditure per person and day and subtraction of the Oregon in-state traveller's share. This procedure was done for four different categories of tourists separately. This figure of 6 million out-of-state visitors is far less than previously estimated numbers of out-of-state visitors (Table 23).

VIII.1.2. Origin

The greatest share of out-of-state visitors in 1988 came from California with 28 per cent, followed by Washington (11.6), Canada (5.8), Texas (3.7), Arizona (3.2), and Florida (3.2) (Table 24). Except for Canadians, international visitors seemed to play a minor role, with only a combined 2.2 per cent. The high percentage of Californians and

Table 23: Out-of-state visitors to Oregon 1968-1982 (in 1000)

1968	9092.3	1976	11880.0
1969	9179.2	1977	13062.8
1970	9083.4	1978	14454.4
1971	10540.0	1979	13520.0
1972	11702.7	1980	13037.6
1973	10491.8	1981	14291.4
1974	N.A.	1982	14205.3
1975	N.A.		

Source: Goeldner et al 1975:36f and 1984:39f

Table 24: Area of origin of out-of-state visitors to Oregon in 1988 (in %)

California	28.0	Illinois	2.5
Washington	11.6	Idaho	2.1
Canada	5.8	Colorado	2.1
Texas	3.7	New York	2.1
Arizona	3.2	other U.S.	33.5
Florida	3.2	other internat.	2.2

Source: Runyan 1989:25f (adjusted for international visitors)

Washingtonians is less surprising, as they are neighboring states.

The figures for 1965 were 49.6 per cent from California, Washington (21.5), Idaho (4.4), and Arizona (1.8) (Goeldner et al 1966:19). The decrease in the market share of California and Washington seemed reasonable, because of the increase in financial capabilities to travel long-distance during the last two decades.

VIII.1.3. Length of stay

The average length of stay in 1988 was 6.7 days (Runyan 1989:40) (Table 25), while it was 5.3 days in 1982 (Goeldner et al 1984:43) and 4.1 days in 1973 (Goeldner et al 1975:43). This increase may be due to the higher percentage of long-distance travellers, who may stay longer in Oregon, once they have reached it. Another reason may be the increase in vacation time.

VIII.1.4. Expenditure and economic impact

According to Runyan, out-of-state visitors spent a total of 941 million dollars in Oregon (Runyan 1989:136), with an average of 46 dollar per person per day (Runyan 1989:83). The estimated visitor expenditure in 1982 was 1411.6 million dollars and 20 dollars per day and visitor in 1981 (Goeldner et al 1984:48f) (Table 26).

Tourism with its estimated 1.7 billion dollars (domestic and out-of-state) impact on Oregon's economy (Runyan 1989:136) is the fourth largest export sector, behind forest products, agricultural products, and high technology manufacturing. About 40,000 jobs are directly related to

Table 25: Length of stay of out-of-state visitors to Oregon in 1988

Nights in Oregon	%
None	2.6
1	7.2
2	13.1
3-5	34.9
6-9	23.7
10-14	11.7
15 and more	6.7
Average	6.7 nights

Source: Runyan 1989:40

Table 26: Out-of-State visitor expenditure in Oregon 1960 - 1982 (in million US dollar)

1960	153.4	1971	438.3
1961	168.1	1972	558.4
1962	168.1	1973	545.4
1963	161.7	1974	620.3
1964	177.2	1975	688.9
1965	182.0	1976	621.4
1966	184.2	1977	725.8
1967	191.0	1978	726.3
1968	285.6	1979	789.8
1969	326.4	1980	840.8
1970	339.5	1981	1269.0
		1982	1411.6

Source: Goeldner et al 1975: 47f and 1984: 46f

tourism (OEDD 1989:6).

VIII.1.5. Remarks

All the above mentioned figures, be they for 1987 or 1982, were taken out of the mentioned sources. While they seem to be reasonable if shown separately, there existed some major inconsistencies within each of these data sources. For example, the calculated 6,040,000 out-of-state visitors (Runyan 1989:136) times 46 dollars (average daily expenditure per person per day) (Runyan 1989:83) and times 6.7 days average length of stay (Runyan 1989:40) would result in 1.862 billion total expenditure by out-of-state visitors. This compares to the estimated 941 million dollars (Runyan 1989:136). It would also be higher than the total estimated 1.7 billion (out-of-state and domestic) impact on Oregon's economy. However, if the 941 million was the correct figure, than either length of stay, daily expenditure or total number of visitors would be wrong. The same problem occurred with the 1982 data (Goeldner et al 1984).

VIII.2. New Zealand

VIII.2.1. Numbers of International Visitors

New Zealand has experienced a dramatic increase in international arrivals since World War II. In the year ending March 1989, 867,522 international visitors arrived in New Zealand, almost 28 times more than 30 years ago (Figure 8). However, this growth was not uniform (Figure 9). While in the years up to 1975 the yearly growth rates mostly exceeded 10 per cent or even 15 per cent, with an average of 16.4 per

Figure 8: Absolute numbers of international visitors to New Zealand 1960-1989
(year ending March)

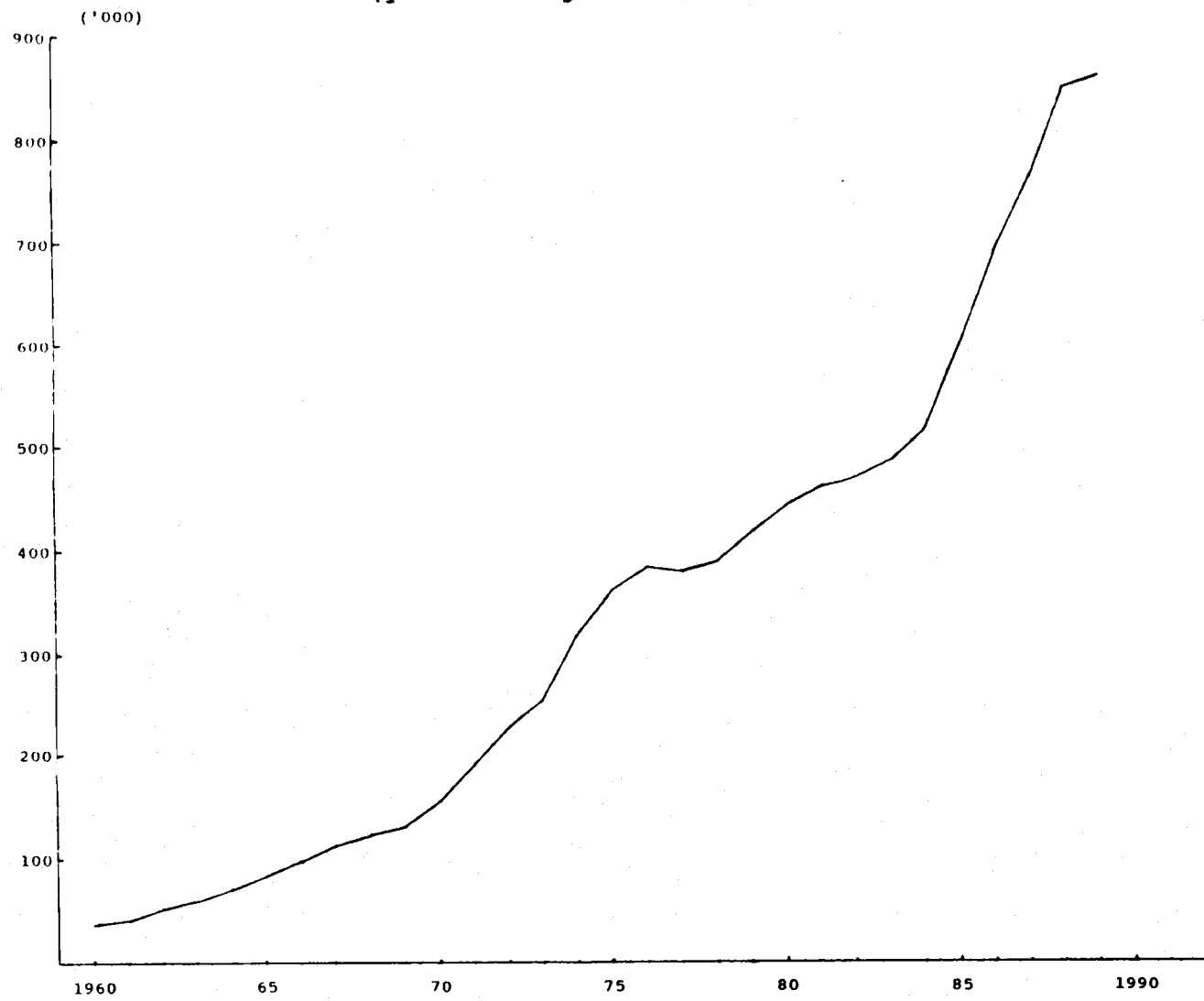
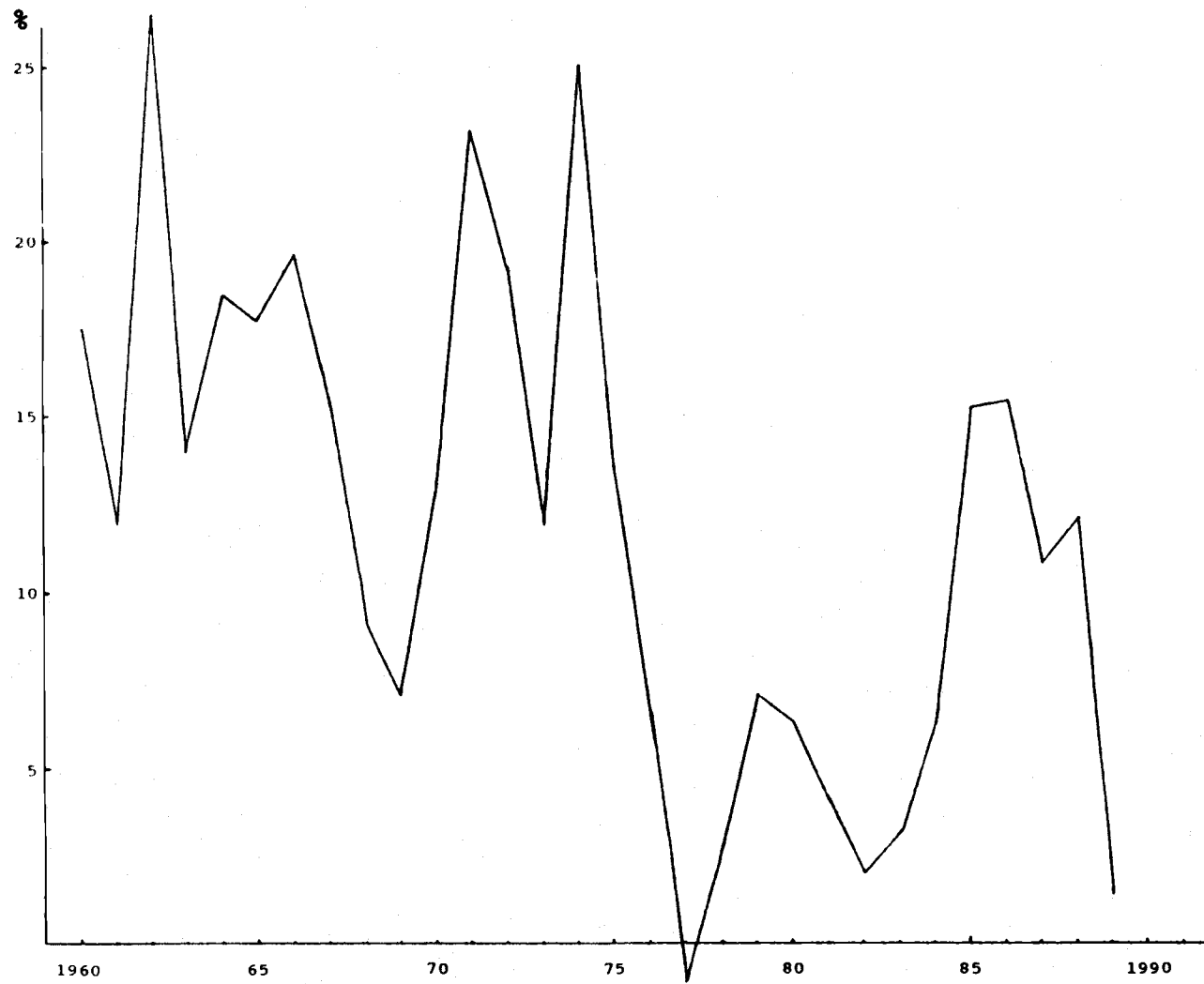


Figure 9: Yearly increase of international visitors to New Zealand 1960-1989



cent, the growth rate slowed down in the late 70's and early 80's, with an average of 4.1 per cent for the years 1975-1984. In 1977 the number decreased by 1.1 per cent. Since 1985 the growth rates once again exceeded 10 per cent, except for 1989, averaging 11 per cent. It remains to be seen if this recent slowdown - only 1.4 per cent growth in 1989 - was the first sign of stagnating international visitor numbers in New Zealand or only a momentarily slowdown.

VIII.2.2.

Origin

The last decades have not only seen a boom in absolute numbers of visitors, but also a diversification in terms of countries of origin. Australia traditionally contributed between 45 and 60 per cent of all visitors. However, its percentage has been declining drastically since 1985 and in the year ending March 1989 only 31.1 per cent of all visitors came from Australia, showing not only a decline in the relative importance of the market Australia, but also a decline in absolute numbers over the year 1988 (Table 27, Figure 10)

The United States is traditionally the second most important market, averaging between 15 and 20 per cent of all visitors, with 18.5 per cent in 1989. In 1989, for the first time, the two most important markets contributed less than 50 per cent of all visitors, instead of the 60-70 per cent market share they hold in former years.

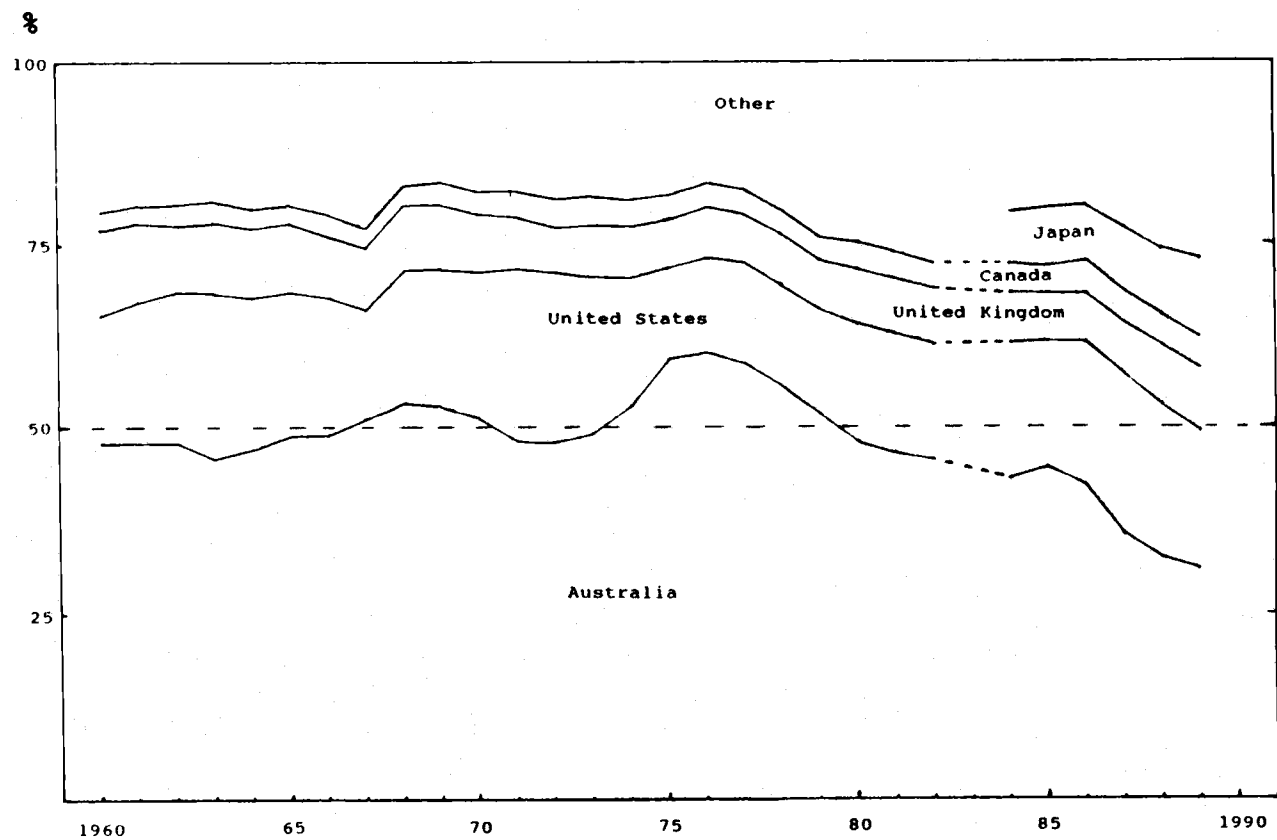
Since 1985 Japan has replaced the United Kingdom as third most important market, and the steady growth of Japanese visitors is reflected in its 11 per cent market share in 1989. In the year ending March 1989, the United Kingdom (8.3%), Canada (4.2%), and West Germany (2.4%) were other important markets.

Table 27: Origin of international visitors to New Zealand
1985-1989 and % change (year ending March)

Origin	1985	1986	1987	1988	1989	%
Australia	265579	291044	272214	293560	269496	31.1
U.S.A.	102672	133908	163390	175621	160353	18.5
Japan	47060	52204	66404	79928	95457	11.0
U.K.	41254	45534	53146	66749	72216	8.3
Canada	23816	32157	34550	34501	36492	4.2
FRG	10135	10956	13182	18705	21199	2.4
Singapore	7632	8448	15329	14989	14993	1.7
Other	98847	114822	144994	171439	197316	22.7
Total	596995	689073	763209	855492	867522	99.9

Source: New Zealand Tourist and Publicity Department 1989b:2
and 'Monthly Tourism Statistics' March 1989

Figure 10: Countries of origin of international visitors to New Zealand 1960-1989



VIII.2.3. Length of stay

In the year ending March 1989, the visitors to New Zealand spent on average 21 days in New Zealand. Compared to 54 days in 1960 (New Zealand Official Yearbook 1961:1095) a significant decrease. This decrease was probably due to a change in transportation media used to travel to New Zealand. The increased use of airplanes to reach New Zealand made shorter stays reasonable. The average of 21 days is hiding the fact that the average length of stay varied according to country of origin. While the average Japanese visitor and the average US-American only stayed 12.5 and 13.5 days respectively, the average visitor from the United Kingdom stayed 39.0 days and from West-Germany 30.9 days (Table 28).

VIII.2.4. Seasonality

The seasonal distribution of arrivals reveals a peak during the summer months, from December until March. Almost 33 per cent of all visitors arrived during these months, while only 18.6 per cent arrived in the three month period May-July (Table 30, Figure 11).

VIII.2.5. Expenditure and economic impact

Overseas visitors to New Zealand spent 1612 million NZ dollars (948 mill. US dollars) in the year ending March 1988, compared to 1309 million NZ dollars (770 mill. US \$) in 1987 (NZTPD 1989b:2). This figure did not include airfares to New Zealand, which were an estimated 650 million NZ dollars (382 mill. US \$) in 1987 (NZTPD 1988:19)

The expenditure per person and day was an average 97 NZ

Table 28: Average length of stay of international visitors to New Zealand in 1989 by origin (year ending March)

Origin	days
United Kingdom	39.0
West-Germany	30.9
Canada	20.5
Singapore	16.7
Australia	16.7
United States	13.5
Japan	12.5
Other	31.3
Average	21.3

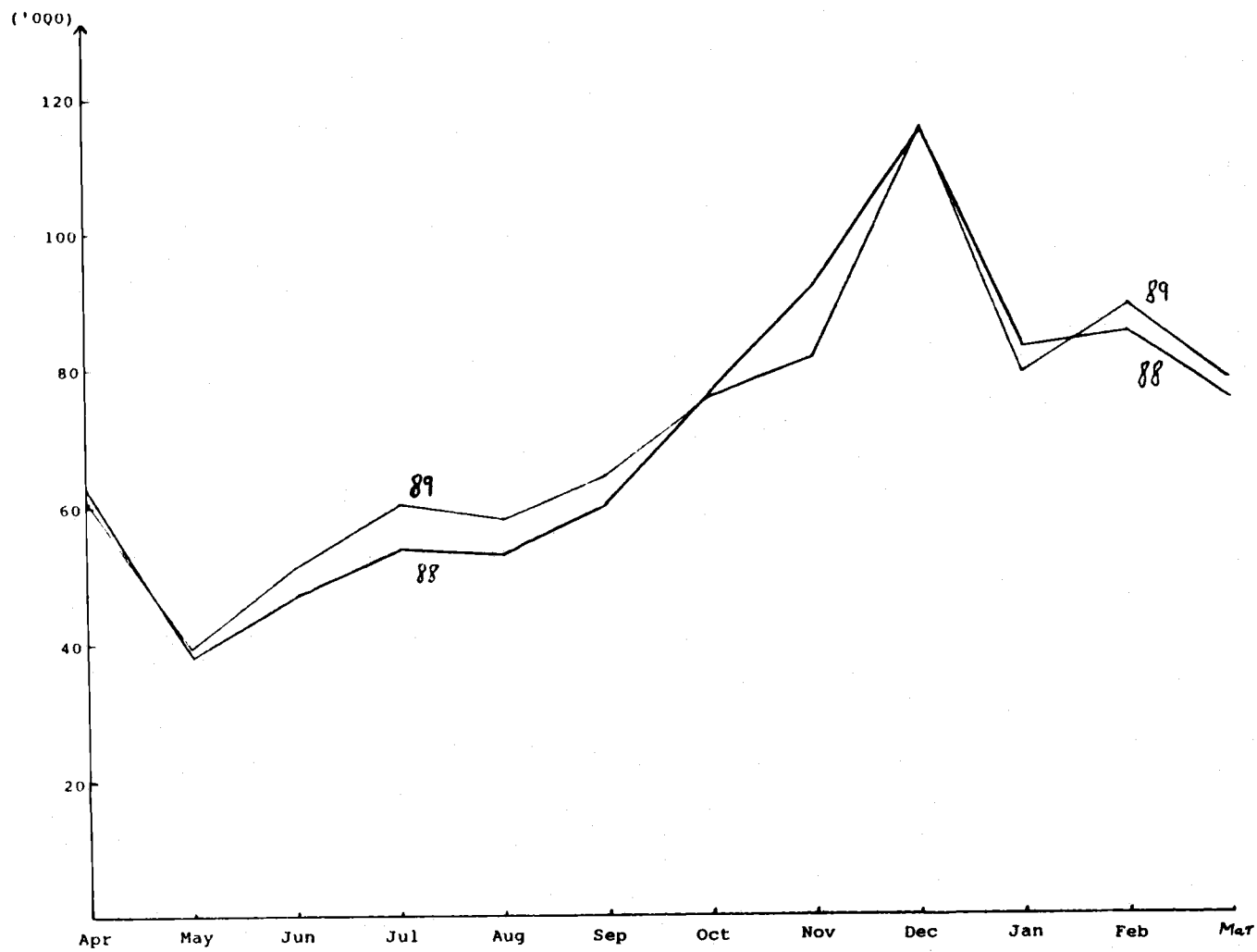
Source: New Zealand Tourist & Publicity Department: 'Monthly Tourism Statistics' March 1989

Table 29: Seasonality of arrivals by major markets in 1989 (year ending March)

Month	Australia	U.S.A.	Japan	U.K.	Canada	FRG	Total
April	7.0	7.9	7.5	5.4	7.4	5.4	7.0
May	5.4	5.5	6.7	4.5	6.2	3.0	5.7
June	6.9	6.7	6.1	3.7	3.4	2.5	5.9
July	7.6	7.8	7.3	4.7	7.7	4.3	7.0
August	6.7	7.0	8.2	5.2	6.2	4.3	6.7
September	9.5	7.5	7.6	4.5	7.2	6.2	7.5
October	6.9	13.0	8.4	8.1	11.6	9.1	8.8
November	7.6	10.8	9.7	9.9	12.2	12.8	9.5
December	15.8	8.3	9.8	17.6	9.5	12.0	13.4
January	8.3	7.4	9.4	12.4	10.8	14.6	9.2
February	8.4	10.6	9.9	14.4	10.1	15.6	10.3
March	10.0	7.5	9.4	9.7	7.7	10.1	9.0

Source: New Zealand Tourist & Publicity Department: 'Monthly Tourism Statistics'

Figure 11: Seasonality of international visitor arrivals to New Zealand 1988 and 1989



dollars (57 US \$) in 1988 for visitors 15 years and older (NZTPD 1989b:2). The daily expenditure varied according to different countries of origin. Japanese visitors spent most (261 NZ dollars a day), followed by the U.S. Americans (165 NZ dollars), while West-Germans spent only 76 NZ dollars and Canadians 62 NZ dollars a day. However, because West-Germans stayed on average more than twice as long as U.S. Americans, their expenditure per person and trip was higher than that of U.S. citizens (Table 30). Tourism ranked among the principal export sectors, being second only to meat. Overseas and domestic tourism with a combined 2.3 billion NZ dollars (1.4 billion US dollars) contributed 3.9 per cent of New Zealand's gross domestic product. International tourism also generated an estimated 42,453 jobs, while the figure for domestic tourism was an estimated 42,356 in 1988 (NZTPD 1989b:4).

Table 30: Total expenditure and expenditure per person per day in 1988 by origin (year ending March) (in Million NZ dollar)

Origin	Total expenditure	per person per day
Australia	373	83
United States	386	165
Japan	299	261
United Kingdom	148	55
Canada	58	62
West-Germany	45	76
Singapore	24	85
Other	278	68
	---	---
	1612	97

Source: NZTPD 1989b:2

IX. Comparison of Oregon and New Zealand as
Tourist Destinations

This section will focus on an actual comparison of both destinations on all three levels, to point out the similarities and differences between Oregon and New Zealand, and to verify or refute the stated hypotheses.

IX.1. The Image Level

The image level was divided into tourism resources and information medias. The tourism resource base is in both destinations rather diverse, offering a wide range of opportunities to the visitor. Both destinations possess plenty of natural attractions including volcanoes, hot springs, mountains, forests, coastline and rivers. In addition, both destinations offer other attractions, not shared by the other. The high desert of Oregon does not have a counterpart in New Zealand. Neither do the big rivers, the Columbia and Snake, and the canyons. New Zealand's Fjordland, subtropical rainforests, Marlborough Sounds, and the higher parts of the Southern Alps with their glaciers are not matched by similar attractions in Oregon. Due to its rather long shape (New Zealand would stretch, if projected on to the northern hemisphere, from Tacoma, Washington to Santa Barbara, California) New Zealand offers a wider range of climate. Another result is the wider range of vegetation, and especially the subtropical vegetation is not matched by Oregon's vegetation. Also due to its island position, it features a more lengthy coastline than Oregon.

More than 8 per cent of New Zealand's land lies within 11 National Parks and another 10 per cent is in other protected areas. This compares with Oregon's one National

Park and two National Monuments with a combined .3 per cent of the state's land area and the 1.7 per cent protected in wilderness areas. However, another 50 per cent of Oregon's land is in public hands and largely available for recreational use. These high percentages on both sides are mostly due to the low population densities, which opened the possibilities to set aside such large areas. These areas already attract visitors by themselves, as they promise a first-hand experience with nature.

The outdoor-recreation opportunities are in both destinations similar and quite varied. Trekking, horse packing, skiing, boating, white water rafting, climbing, hunting, and fishing are possible in both. However, New Zealand seems to offer the better opportunities for trekking, and mountain climbing, while Oregon may be more favorable to white water rafters and wind surfers.

The natural attractions and outdoor-recreation opportunities seem to be the main attractions of both destinations, but each also offers cultural attractions. In Oregon the emphasis seems to be on historical attractions, whereas in New Zealand it is on the Maori culture. Ironically, the real exploration of both destinations started with voyages of Captain James Cook and both indigenous populations decreased rapidly thereafter. However, in New Zealand a revival of the Maori culture has taken place during recent decades, due to high birthrates and immigration from Polynesia. Today, 9 per cent of New Zealand's population are of Maori or Polynesian origin, compared to only 1 per cent Indians in Oregon. Due to the low population size, neither destination offers very great urban attractions.

Because of its position on a continent, Oregon is much more accessible than New Zealand. While all foreign visitors to New Zealand either have to use plane or ship, North-American visitors to Oregon can use their own cars or public

buses.

The infrastructure within both destinations is very similar. The road network is, except for the few urban areas and their hinterland, rather sparse and sometimes hindered by mountain chains. Both offer similar transportation facilities, rent-a-car, buses, planes. But as mentioned above, the visitor to Oregon may also travel in his/her own car. The overnight facilities range from simple campgrounds to first class hotels, however, the whole range is not available everywhere. Motels and hotels conform to western standards and are therefore suitable to cater to visitors from the main tourism markets. Both destinations have similar numbers of hotel/motel facilities and campground units. New Zealand has more accommodations in the form of private guest houses, farm homes, and Youth Hostels. Restaurants with a variety of international cuisine exist in both destinations, but are mainly concentrated in the few major cities and tourism resorts.

The initial travel cost from the major tourism markets, North-America and Europe, favors Oregon, because of its relative proximity. The travel cost within both destinations seems to be relatively similar and depends mainly on the exchange rate with respect to the visitors currency and the style of accommodation selected.

The most favorable season to travel in these destinations is very different. The main season in Oregon are the months June until September and in New Zealand the months December until March. For those persons interested in skiing the seasons are naturally opposite to the ones mentioned.

Oregon's seasons coincide with the institutionalized holiday season in the main tourism markets, while New Zealand's are opposite. This results in advantages and disadvantages for both destinations, but at the moment it seems more favorable for Oregon. However, this may change in

the future, as the trend is toward one or two person households and also toward more flexible vacation times.

Another change may come with charter flights. The trend of charter flights is towards more and more distant destinations. For example, charter flights to Hawaii were offered during summer 1989 in West-Germany. There may come a day when charter flights are offered to New Zealand and a future reduction in travel cost to New Zealand from Europe seems likely. However, while this may increase the number of visitors from longhaul destinations, the number of visitors from Australia to New Zealand might decrease for the very same reason, as other destinations become more affordable to Australians. Oregon also seems likely to gain better direct connections with more overseas markets. Lufthansa has applied to start a direct service from Frankfurt to Portland, which if started would reduce the flighttime significantly, avoid potential bottle-necks, and may even decrease the travel cost.

In terms of information-media exist some considerable differences between Oregon and New Zealand, especially in terms of official promotion by both tourism departments. New Zealand's annual tourism promotion budget is 90 million NZ dollars (53 million US dollars), of which 35 million NZ dollars (20 mill. US dollars) is allocated to overseas marketing (NZTPD 1988:2). Oregon's biennial budget is 3.5 million US dollars, or about 1.75 million US dollars per year. Hence, New Zealand spends more for its overseas marketing than Oregon's total budget. While Oregon's promotion is mainly active in the markets of America's Far West and to a lesser extent in the Midwest, Texas, and some Pacific Rim countries, New Zealand's promotion is active in Australia, North America, Europe, Southeast Asia, some other Pacific Rim countries, and even in Argentina. New Zealand highlights its natural attractions and beauty and, to a

lesser extent, safety, and the Maori culture. Oregon on the other hand, is trying to point out its different lifestyle and ambience.

The examined travel guides gave more prominence to Oregon's natural attractions and history. They brought out more the cultural attractions, particularly the unique Maori culture, and urban attractions in New Zealand.

IX.2. The Perception Level

New Zealand's natural attractions were perceived more favorably than Oregon's by the Frankfurt respondents. The difference for all natural image attributes, including climate, scenery, mountains, coast, wildlife, and outdoor-recreation was at least .5. For coastal attractions it was even more than 1.0. This difference was reflected, to a different extent, by a breakdown of the respondents by areas of origin. Except for mountains, which North-Americans perceived more favorably in Oregon, all natural attractions were perceived to be better in New Zealand by respondents from all regions (Table 14, Table 15).

Most of the image attributes belonging to the general area of cultural attractions were also perceived to be better in New Zealand. However, the differences were relatively small compared with the natural attractions. Oregon's cost of travel was more favorably perceived by all respondents, particularly by the North-Americans. North-Americans perceived New Zealand's historical and cultural attractions more favorably than Oregon's, with a difference of more than .5. Persons of other countries perceived New Zealand's infrastructure as slightly better and did not perceive a great difference with respect to cost of travel.

The differences in perceptions were also reflected in the

overall average - New Zealand 2.85 and Oregon 3.30. While New Zealand was perceived by West-Germans and North-Americans similarly with 2.78 and 2.82 respectively, and by others with 3.05, Oregon was perceived less favorably by West-Germans 3.31 and others 3.57, compared to North-Americans 3.11.

A further breakdown of the West-German respondents, with respect to familiarity with the destinations California, Oregon, and New Zealand, disclosed a further difference. The majority, 61.3 per cent, had never been to any of these destinations, and their perceptions were similar to those of the whole sample. Another 28.0 per cent had been to California, however, their perceptions also did not vary substantially. Twenty persons (10.8%) had been either to Oregon or New Zealand, or a combination of all three destinations. Their average perception of New Zealand was worse than those of the former groups, 2.93 compared to 2.79 and 2.76 respectively. However, the average perception of Oregon was considerable more favorably by the third group than by the two former groups, 2.96 compared to 3.34 and 3.23 respectively. The third group had a similar overall perception of both destinations, 2.93 for New Zealand and 2.96 for Oregon. Their perception of New Zealand's natural attractions was more favorable, but, except for urban attractions, they perceived all cultural attractions as being better in Oregon. This may be due to the fact that this group of 20 persons were more familiar with Oregon overall. Sixteen had been to Oregon, while only 6 had been to New Zealand.

The breakdown of the North-American respondents did not reveal any great differences in the perception of Oregon and New Zealand. The tendency was for Canadians to perceive New Zealand more favorably than the North-American average and Oregon less favorably. Californians perceived both destinations about the same (Table 21, Table 22).

IX.3. The Actual Travel Pattern

Oregon was the destination of an estimated 6,040,000 out-of-state visitors in 1987 (Runyan 1989:136), while 763,209 international visitors visited New Zealand in the year ending March 1988. Oregon therefore received almost 9 times as many visitors as New Zealand. This difference was probably caused by a combined cost-distance factor, as most visitors to Oregon came from comparably close markets.

Most visitors to Oregon (92%) came from its most important market, the other states of the U.S. The figure for New Zealand was 32.5 per cent from its most important market, Australia. For the two most important markets the figures were 97.8 per cent and 49.5 per cent respectively. Oregon was therefore much more dependent on its major markets than New Zealand. It also means, that Oregon is more vulnerable to a possible slowdown in the economy of its major markets. However, because 92 per cent of its visitors came from the domestic US-market the dependency is not as severe, as it would be for a longhaul market.

The average visitor to Oregon stayed 6.7 days in 1988 (Runyan 1989:40) compared to 21.3 days the average visitor spent in New Zealand in 1989 (NZTPD 1989b:2). This indicates that New Zealand is primarily a holiday destination, where visitors tend to spend a lot of time and probably the major part of their vacation time in one year. In Oregon, on the other hand, only 6.7 per cent spent more than 2 weeks, while most visitors (57.8%) stayed 5 days or less, indicating a higher percentage of short term visitors, possibly on transit to other destinations. The typical vacation for North-American travellers is somewhat longer than the average 6.7 days spent in Oregon. The state thus seems to be a secondary destination for most visitors, or part of a 'travel package', including other destinations.

Out-of state-visitors to Oregon spent a total of 941 million US dollars in 1987 (Runyan 1989: 136), compared to 1,612 million NZ dollars (948 million US dollars), which international visitors spent in New Zealand (year ending March 1988). Despite the great difference in total numbers of out-of-state and international visitors, the tourism expenditure was about equal. Higher expenditure per person per day and an average three times longer stay are the cause for this. While the average visitor to New Zealand spent 2,070 NZ dollars (or 1220 US dollars at an exchange rate of 1.70) during his/her vacation, the average visitor to Oregon spent only 300 US dollars, or about one fourth as much. This could lead to the conclusion that New Zealand is the more expensive destination, that visitors are willing to spend more in New Zealand, or that New Zealand attracts a wealthier clientele. Still another reason could be the differences in transportation costs. While most visitors to Oregon arrived in their own cars (72%), visitors to New Zealand do not have this option available. Hence, they have to spend more money on transportation within New Zealand than do visitors to Oregon.

Tourism was the fourth largest export sector in Oregon in 1987, while it was second largest in New Zealand. In Oregon, about 40,000 jobs were directly related to the tourism industry, while it were about 85,000 (direct and indirect) in New Zealand.

IX.4. Testing of hypotheses

As noted in section I, the hypotheses used in this study were:

- (A) a quantitatively and qualitatively better resource base results in a more favorable

perception;

- (B) similar resource bases may still result in different perceptions;
- (C) similar perceptions result in similar travel patterns and a more favorable perception results in a higher volume of travel flow.

The image attributes climate, scenery, mountains, coast/coastline and cultural attractions are somewhat more dramatic and varied in New Zealand (IX.1). Following hypothesis (A), New Zealand should therefore be perceived more favorably with respect to these image attributes. This was verified by the result of the survey (Table 13, Figure 7). The cost of travel to Oregon is lower for North-Americans and Europeans, although the internal travel cost may be similar for travellers who arrive without cars. In accordance with hypothesis (A) Oregon should be perceived as the cheaper destination, which it was. Hypothesis (A) seems therewith verified, as the differences in perception were significant at the 95 per cent confidence level (Figure 7).

Both destinations possess similar outdoor-recreation opportunities, historical attractions, urban attractions and infrastructure. Following hypothesis (B) these similar image attributes may still be perceived differently. Outdoor-recreation and infrastructure were perceived differently, with the former favoring New Zealand and the latter favoring Oregon. Historical and urban attractions were perceived to be relatively similar (Figure 7). These findings support hypothesis (B).

The overall perception of New Zealand was more favorable than that of Oregon. In accordance with hypothesis (C), New Zealand should therefore receive more international/out-of-state visitors than Oregon. However, more than 5 million more visitors travelled to Oregon than to New Zealand. This refutes hypothesis (C).

How can this be explained? Are perceptions not important in the destination choice? Are other factors involved in the perception building process? Is cost a major deterrent of travel behavior, overriding favorable perceptions and resources?

The more favorable overall perception of New Zealand was confirmed by another result of the survey. Out of 12 destinations, the respondents on the average ranked New Zealand second and Oregon last, when asked where they would travel if they had the time and money to do so (Table 10). This not only supported the better overall perception of New Zealand, but also indicated a very high competitiveness of New Zealand among international travel destinations. The question was based on two assumptions, enough time and money. Perhaps these two factors are more influential in the travel destination decision than others, despite the relatively low ranking of cost of travel in their destination decision process (Table 10). This seems to be supported by three other findings: (1) Oregon was perceived as a cheaper destination, 4.03 compared to New Zealand's 4.62 (Table 12); (2) 69 persons (19.4%) of the sample had been to Oregon, while only 12 (3.4%) had visited New Zealand (Table 11); and (3) the average expenditure per person per day of out-of-state visitors to Oregon was lower than the average of the international visitors to New Zealand. Still another reason for the low ranking of the cost of travel factor in the importance of 14 image attributes in the destination choice may be the fact, that for this relatively well travelled and probably wealthy sample (p.49) cost was not very important in their destination decision. However, for most people cost of travel is probably one of the main constrains in their destination choice.

The time factor may also be a cause of the difference in travel flow. Whereas visitors to Oregon stayed on average 6.7

days and were mostly short-term visitors, those to New Zealand stayed on average 21.3 days and can therefore be classified as long term visitors. Oregon seems to be a destination for visitors, who either are one-day trippers or just spent a weekend or week in Oregon, perhaps on their way through or including Oregon in a travel package. Still another aspect of time relates to seasons, including the institutionalized holiday season and the main tourist season of the destination. As mentioned above, Oregon's main tourist season overlaps with the institutionalized holiday season in the United States and Canada, its primary markets. On the other hand, New Zealand's main tourist season overlaps only with the institutionalized holiday season of Australia, its primary market.

Underlying the above mentioned differences between Oregon and New Zealand is the respective geographical location of both. Two factors seem to be relevant: (1) within 2000 kilometers of Portland, Oregon, are several major population centers, including San Francisco, Los Angeles, and Vancouver, Canada, while within the same distance of Auckland, New Zealand, is just vast ocean (Figure 12, Figure 13); (2) New Zealand can only be reached by plane or on a lengthy boat journey, while Oregon is accessible by private and public ground transportation. Nearly 72 per cent of Oregon's out-of-state visitors used their own cars, while only 23 per cent arrived by plane. The importance of geographical location, with the induced factors cost, time, and accessibility, in the travel destination decision process is supported by testing hypothesis (C) on the destinations California and Oregon, two neighboring states at the Pacific Coast. The sample population had a much more favorable perception of California (2.71) than of Oregon (3.30). In accordance with hypothesis (C) California should attract more visitors than Oregon, which it does. In 1986, 14.1 million visitors

travelled to California (Runyan 1989:136), more than twice as many as visited Oregon in 1987. Hypothesis (C) was therewith verified for these two similarly located States.

Figure 12: Areas of equidistance from Portland, Oregon (distances in kilometers)

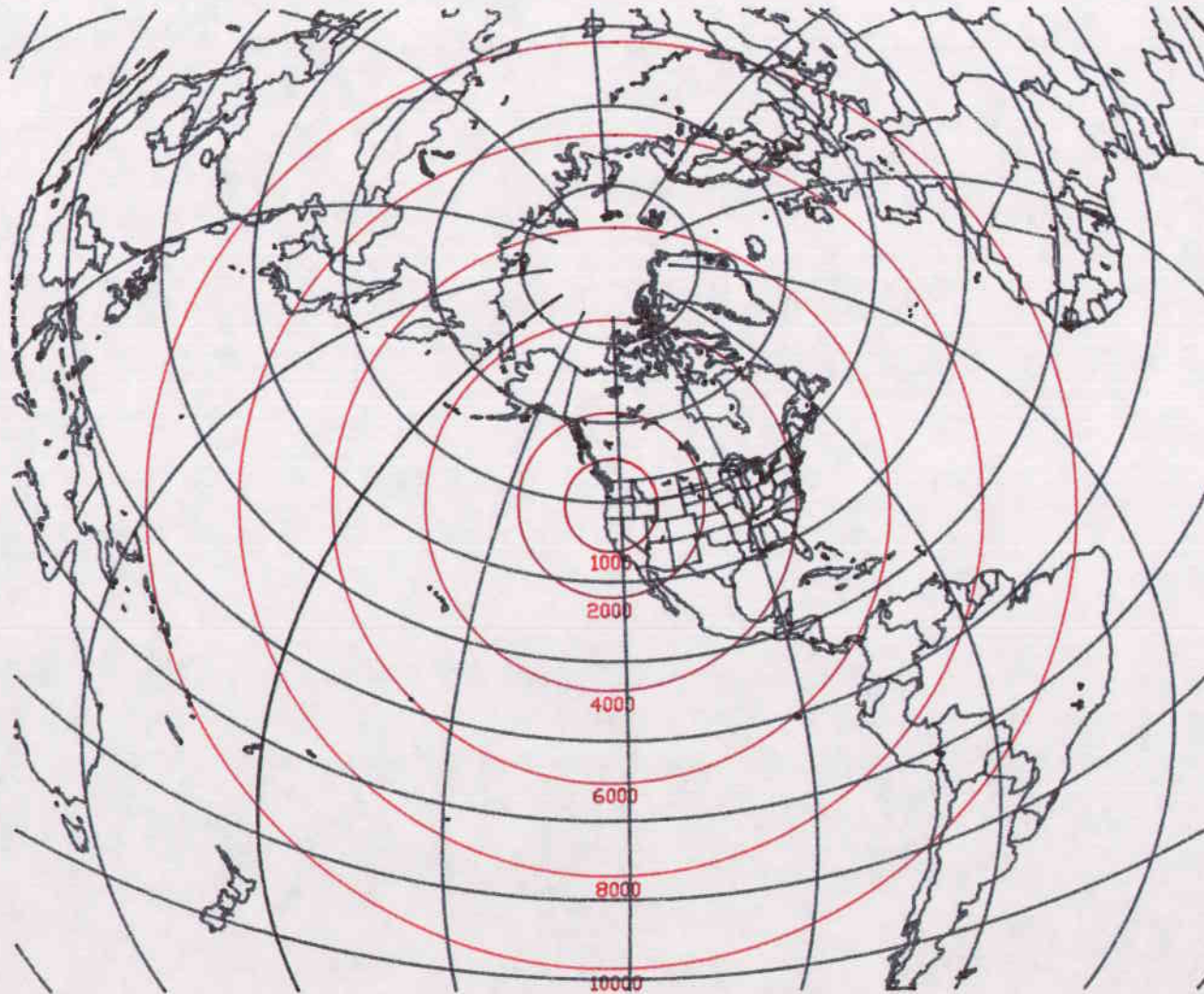
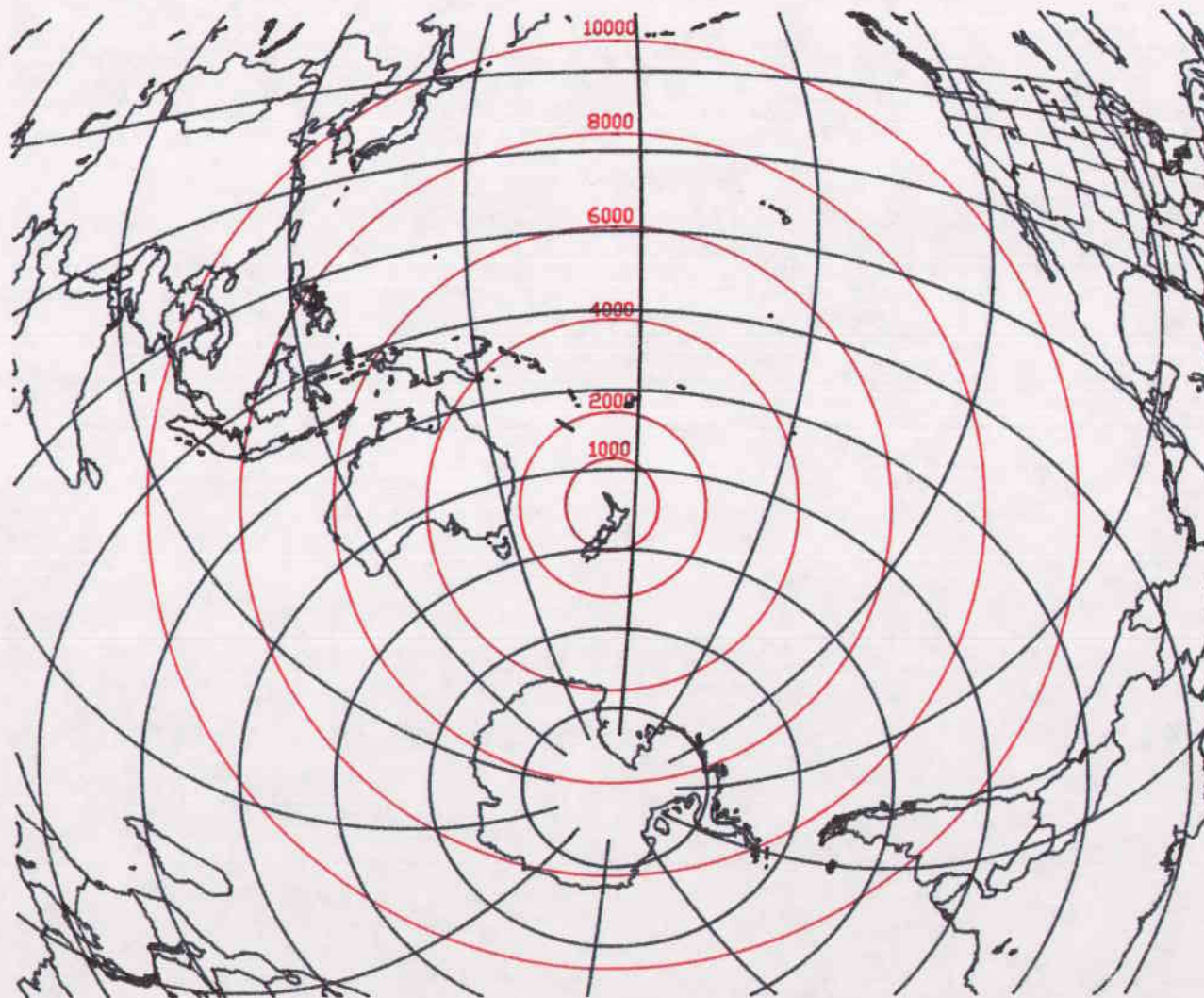


Figure 13: Areas of equidistance from Auckland, New Zealand (distances in kilometers)



X. Applications

The main purpose of most marketing research is to increase the sale of a product. In tourism this product is the tourist experience. Hence, the purpose of tourism marketing is to increase the volume of travel flow to a certain location or destination. To attain this goal it is not only important to know what the destination has to offer, but also to know what the persons in the market want and how they perceive the destination in question. Because information media are an important factor in the construction of images and perceptions advertising is used to change or reinforce images and perceptions. Both, Oregon and New Zealand, use advertising to promote themselves as tourist destinations, however, to a various extent (see section VI). The result of the survey at Frankfurt airport indicated that the overall perception of New Zealand was very favorable compared with Oregon's (Table 12). The survey also revealed a very high competitiveness of New Zealand and a very low competitiveness of Oregon among international travel destinations (Table 10, Figure 5). Hence, Oregon is more in need to improve its image to compete on the international tourism market.

New Zealand's Tourist and Publicity Department uses a refined strategy towards promoting New Zealand as a tourist destination. It promotes different themes to attract tourist in the various tourism markets around the globe (NZTPD 1989a). Oregon, on the other hand, is not yet very active in many markets and, probably due to lack of funds, has hardly adjusted its promotion to the different markets.

This section will focus on how Oregon could improve its image by using the results of this study, particularly the results of the survey. The West-German market will be used as an example, because it is a potential market for future

advertising by Oregon (see VI.1) and it is the world's largest single national market with respect to tourist numbers and expenditures. West-Germans have on average very long holidays, compared to North-Americans and Japanese, which makes it an even more interesting market. In addition, Europe is as close to Oregon as the Pacific Rim countries of the Far East (Figure 12), an often neglected fact in recent economic decisions in Oregon.

To promote Oregon in West-Germany most successfully it is important to establish some relationships: (1) what do West-Germans want in their holidays; (2) can Oregon facilitate these needs; and (3) how can West-Germans be encouraged to perceive Oregon as a place where those needs can be met. If Oregon can facilitate the interests of the West-German market and is favorably perceived then Oregon would only need to reinforce those favorable perceptions. However, if they are less favorably perceived it would need to change these perceptions.

What do West-Germans want in their holidays, which are the most important image attributes in their destination choice? According to this survey, scenery, friendly people, climate, and outdoor-recreation opportunities were by far the most important image attributes in their destination choice (Figure 4). These wants could be satisfied in Oregon. It offers a very varied scenery, various outdoor-recreation opportunities, and the people are generally friendly. Oregon's climate is also favorable, at least during West-Germany's main holiday season, June until September. Except for climate, these image attributes were also the most favorably perceived ones (Table 15). Hence, there existed a relatively great concurrence between Oregon's assets, the perceptions of these assets by West-Germans, and what West-Germans were looking for in their holidays. Thus it should be relatively easy to awaken a greater interest in the West-

German market for the destination Oregon. Oregon should focus in its advertising on its scenery, the outdoor recreation opportunities, the relatively dry and warm climate during the summer months, and its friendly people. Other image attributes, particularly coastal and historical attractions, were perceived as relatively poor although they are some of the more important assets of Oregon and were also relatively important in the destination choice by West-Germans. These relatively poor perceptions of the Oregon Coast and Oregon's historical attractions could be changed through advertising to improve the overall perception of Oregon.

XI.

Limitations

This study is subject to some limitations: (1) The evaluation of the tourism resource base was done in a more qualitative descriptive way than in a quantitative fashion. Quantification of resource basis is difficult, as Smith pointed out (Smith 1988:239). A 1,000 kilometer long coast is not necessarily ten times better or ten times more attractive than one of 100 kilometers. Also a good ski-climate is for some people preferable to a warm climate, depending on their interests. One of the few generalizations about the tourism resource base of a destination which can be made is, that the more diversified the resource base is, the more likely is it to offer some kind of attraction for most potential visitors;

(2) The information media, friends/relatives, travel agencies, travel brochures and magazines were not examined in their presentation of both destinations, although they may be some of the most relied upon by potential travellers;

(3) The social characteristics of the sample population were those of an airport population, and therefore not necessarily representative of a national population. The sample should have been also bigger, to include a greater variety of nationalities in sufficient numbers. However, compared with other studies in the field of tourism, this sample was relatively large;

(4) The accuracy of data on Oregon tourism was much less than New Zealand's. This should be kept in mind when comparing these two data sets. Many studies encounter the same problem: lack of data and unreliable or at least questionable data.

XII.

Summary and Conclusion

A comparison of the two tourist destinations, Oregon and New Zealand, was the focus of this study. After a brief description of both destinations, some facets of tourism, relevant to both destinations were examined in four steps: (1) the tourism resource base was identified; (2) some information media were examined and their emphasis in promoting Oregon and New Zealand as tourist destinations; (3) the perceptions of Oregon and New Zealand by an international sample was the focus of the third step; and (4) the actual travel pattern in both destinations was examined. These four steps followed closely a developed model which includes the various factors involved in a destination decision process (Figure 1). The different facets of tourism were then compared and the hypotheses tested. Hypothesis (A), a quantitatively and qualitatively better resource base results in a more favorable perception, and (B), similar resource bases may still result in different perceptions, were verified for these two tourist destinations. Hypothesis (C), similar perceptions result in similar travel patterns and a more favorable perception results in a higher volume of travel flow, was not supported for Oregon and New Zealand. This was attributed to the respective geographical locations and therewith induced factors, such as cost, time, and accessibility. The verification of hypothesis (C) for the destinations Oregon and California supported this assumption.

The contribution of this study to the field of tourism is the integration of the various aspects of tourism and comparison of two destinations with respect to these facets in one study. The relationship of tourism resources and perceptions of a destination was established and, to a certain extent, the influence of perceptions on travel flows. The study also indicated the importance of geographical

location upon travel flows. Although some studies have been done in the latter field (Smith 1989), it still seem to be a field where further research is needed.

Despite the fact that the literature on tourism has been growing during recent decades, most studies are on local or regional level, or concentrate on one of the many aspects of tourism. Comparative studies of tourism regions are exceptions, as are studies which integrate several aspects of tourism.

The growth of international tourism and its significance in today's world makes tourism a field, where more comprehensive studies are needed. Descriptive studies of world tourism resources (Lundberg 1985; Davidoff et.al. 1988) may be a start, as is a geographical analysis of world tourism flows (Pearce 1987).

A comprehensive analysis of international tourism - integrating all facets of tourism, motivations, tourism resources, information media, perceptions, geographical location, travel flows, etc. - is needed. In this respect it seems appropriate to conclude that this study was a small step in the direction of a general understanding of world tourism flows.

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SURVEY

This is a survey for a Thesis-Research. All responses will be kept strictly confidential.

1. What is your home-country (-state)? _____
2. When did you last travel out of your home-country?
 1989 1988 1987 1985/86 1980/84 before 1980 never
3. Which world-regions did you travel to during the last 2 years? (check what apply)
 Western Europe Africa North-America Central-/South-America
 Eastern Europe Asia Austral-Ozeania
4. How often do you usually travel out of your home-country?
 never once in 3 years once each year three times a year
 once in 5 years once in 2 years twice a year more than 3 times/year
5. What was the longest trip you ever did (out of your home-country)?
country(ies): _____ year: _____ length: _____
6. What is your usual purpose for travelling out of your home-country? (check all that apply):
 vacation/pleasure visit friends/relatives business conference/convention
 personal or family affairs other _____
7. How important are the following attributes in your choice of a travel destination.

	very important							unimportant						
	1	2	3	4	5	6	7	1	2	3	4	5	6	7
Beaches	1	2	3	4	5	6	7	1	2	3	4	5	6	7
Mountains	1	2	3	4	5	6	7	1	2	3	4	5	6	7
Scenery	1	2	3	4	5	6	7	1	2	3	4	5	6	7
Recreation opportunities	1	2	3	4	5	6	7	1	2	3	4	5	6	7
Friendly people	1	2	3	4	5	6	7	1	2	3	4	5	6	7
Historical attractions	1	2	3	4	5	6	7	1	2	3	4	5	6	7
Cultural attractions	1	2	3	4	5	6	7	1	2	3	4	5	6	7
Urban attractions	1	2	3	4	5	6	7	1	2	3	4	5	6	7
Cost of travel	1	2	3	4	5	6	7	1	2	3	4	5	6	7
Wildlife	1	2	3	4	5	6	7	1	2	3	4	5	6	7
Infrastructure	1	2	3	4	5	6	7	1	2	3	4	5	6	7
Climate	1	2	3	4	5	6	7	1	2	3	4	5	6	7
Coast	1	2	3	4	5	6	7	1	2	3	4	5	6	7
Lakes and Rivers	1	2	3	4	5	6	7	1	2	3	4	5	6	7
8. Have you heard of any of the following countries/states?
Oregon yes no New Zealand yes no California yes no
9. What do you associate with Oregon?

10. What do you associate with New Zealand?

11. What do you associate with California?

12. Did you ever travel to any of the following countries/states?
Oregon yes no New Zealand yes no California yes no
13. If you would have the time and money, which of the following countries would you most prefer to visit compared with the others? (please rank the countries from 1 to 12, and give the 1 to the most and the 12 to the least preferred destination.)
 Japan Australia Oregon Indonesia Florida South-Africa
 Nepal Brasil Kenia New Zealand Mexico California

14. How would you think Oregon, New Zealand, and California would rank with respect to each of the following on a scale from 1 to 7?

		Exceptional					very poor	
		1	2	3	4	5	6	7
Climate	Oregon	1	2	3	4	5	6	7
	New Zealand	1	2	3	4	5	6	7
	California	1	2	3	4	5	6	7
Coast/Coastline	Oregon	1	2	3	4	5	6	7
	New Zealand	1	2	3	4	5	6	7
	California	1	2	3	4	5	6	7
Mountains	Oregon	1	2	3	4	5	6	7
	New Zealand	1	2	3	4	5	6	7
	California	1	2	3	4	5	6	7
Scenery	Oregon	1	2	3	4	5	6	7
	New Zealand	1	2	3	4	5	6	7
	California	1	2	3	4	5	6	7
Recreation opportunities	Oregon	1	2	3	4	5	6	7
	New Zealand	1	2	3	4	5	6	7
	California	1	2	3	4	5	6	7
Friendly people	Oregon	1	2	3	4	5	6	7
	New Zealand	1	2	3	4	5	6	7
	California	1	2	3	4	5	6	7
Historical attractions	Oregon	1	2	3	4	5	6	7
	New Zealand	1	2	3	4	5	6	7
	California	1	2	3	4	5	6	7
Cultural attractions	Oregon	1	2	3	4	5	6	7
	New Zealand	1	2	3	4	5	6	7
	California	1	2	3	4	5	6	7
Urban attractions	Oregon	1	2	3	4	5	6	7
	New Zealand	1	2	3	4	5	6	7
	California	1	2	3	4	5	6	7
Wildlife	Oregon	1	2	3	4	5	6	7
	New Zealand	1	2	3	4	5	6	7
	California	1	2	3	4	5	6	7
Infrastructure	Oregon	1	2	3	4	5	6	7
	New Zealand	1	2	3	4	5	6	7
	California	1	2	3	4	5	6	7
Cost of travel		cheap					expensive	
	Oregon	1	2	3	4	5	6	7
	New Zealand	1	2	3	4	5	6	7
California	1	2	3	4	5	6	7	

15. What is your age?
 under 20 20-25 25-30 30-40 40-60 above 60

16. Sex: female male

17. What is your average expenditure for travelling during one year? _____

18. Your profession? _____

19. What is your 'dream-country' for a holiday trip? _____

Thank you very much for your participation, have a nice day!