

Travel Lane County

FY13 Semi-Annual Report

July 2012 - December 2012



Travel Lane County

Adventure Center 3312 Gateway St., Springfield • Downtown Visitor Center 754 Olive St., Eugene

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Table of Contents

President's Summary	2
Executive Summary	3
Travel and Tourism: An Economic Generator	4
Return on Lane County Room Tax Investment	4
Tourism in Lane County, Oregon and America	4
Travel Lane County: A Private-Public Partnership	4
Travel Lane County's Mission	4
Room Tax	5
Hotel/Motel Occupancy	5
Eugene Airport Deplanements/Amtrak Rail Ridership	5
Travel Lane County Programs	
Convention & Sports Marketing	6
Convention & Sports Services	7
Tourism Marketing & Sales	9
Visitor Services	12
Membership & Integrated Marketing	13
Community Relations	15
Administration	17
Footnotes & Sources	18
Formulas	18
Attachments	
Travel Lane County Board of Directors	
Travel Lane County Organizational Chart	

President's Message

Kari Westlund, President & CEO, Travel Lane County

The program year is showing mixed results to date, with confirmed convention and sports bookings up in terms of the number of leads confirmed, but room nights and delegates a bit softer than last year. Lead production and media coverage are up, and our sales team is working diligently. With the sports commission finishing up its first year, we noted a marked increase in sports event interest in the destination. Several very large sports events remain as pending, so we may see additional confirmations realized from efforts initiated during these first six months. Details on leads lost are on page 6.

In leisure marketing, our lead generation shifted dramatically from our own advertising to partner referrals from Travel Oregon and our two regional marketing partners, Willamette Valley and Oregon Coast. This is in large part due to a steep decrease in our advertising budget for the year, driven by a reduced overall budget.

We entered the fiscal year having to pay off a significant deficit in the Lane County account that funds our marketing contract. The deficit had accumulated over several years of payments to Lane County Parks and Travel Lane County concurrently, at combined amounts above TRT revenue generated to the account. Travel Lane County took responsibility for paying off the deficit, reducing its annual budget for FY13 accordingly. This impacted our destination advertising budget and has caused us to reduce our staff by one position.

In spite of this, overall inquiries dropped by just one half of one percent, and social media contacts increased significantly. Overall, our online marketing efforts have been successful and more of our time and investment is being positioned to attract and serve prospective visitors online. Our website is our flagship marketing investment, and its patronage continues to rise across measurable categories, including site visits, unique visitors, and page views.

Visitor Services totals held close to even, off just one third of one percent, with most of the softening at our downtown visitor center. Programming at the Adventure Center continued to attract new visits to the Center, and our team of Adventure Specialists created several successful projects, highlighted by an internationally recognized GeoTour up the McKenzie River corridor in October, to be followed by a Florence and coastal edition this spring.

Private sector membership investment in Travel Lane County grew to 539 during the period, but we continue to see recessionary impacts on cash flow for visitor industry businesses across sectors. There is a lot of churn in small businesses, with new businesses being formed but business closures as well.

Community outreach included television advertising and campaigns focused on families, including the quarterly Kids Adventure Club programming at the Adventure Center, family activity e-news and events calendar distribution. Our annual photo contest resulted in more than 65 images being added to our permanent usage collection. We facilitated Travel Oregon's listening session in Eugene and participated in the Transient Room Tax Task Force meetings series, communicating updates to the visitor industry.

Coming off of a very strong summer in which we hosted an Olympic Team Trials and saw the single biggest hotel revenue and TRT month on record in June of 2012, the fall seemed quiet in comparison. Local hotel competition kept rates a good bargain for visitors, but dampened TRT revenues. While visitor volumes are holding steady or even growing slightly, hotel revenues and TRT collections are flat overall.

Executive Summary

Overall Returns: \$16,641,000

Room Tax Investment: \$803,404

Ratio: 21:1

For every dollar of room tax invested in Travel Lane County, an estimated \$21 in visitor spending came or will come to the county economy. This is an estimate of direct expenditures; no multipliers are incorporated. In addition to \$104,143 in private dollar revenues, Travel Lane County generated \$116,370 in media and public relations exposure and \$9,581 in in-kind support, extending the reach of its budget.

Convention Sales	Jul-Dec '12	Jul-Dec '11	Jul-Dec '10	Jul-Dec '09	Jul-Dec '08
Leads Achieved	95	66	76	123	124
Room Nights Booked	25,976	32,443	20,143	27,065	23,719
Delegates Booked	80,205	90,456	53,708	76,036	100,044
Est. Economic Impact	\$11.6 million	\$17.6 million	\$12.1 million	\$22.5 million*	\$17.1 million

** In FY09, the NCAA Outdoor Championships for 2013 and 2014 were confirmed, totaling \$12.8 million in EEI. In FY07, the 2012 Olympic Team Trials-Track & Field was confirmed. National Track & Field events generate significant attendance, room nights and economic impacts, and make year to year comparisons difficult.*

Tourism Sales	Jul-Dec '12	Jul-Dec '11	Jul-Dec '10	Jul-Dec '09	Jul-Dec '08
Media Coverage (non-local)	\$75,280	\$132,063	\$372,155**	\$143,099	\$636,656
Media Coverage (Circulation)	72,974,653	16,622,078	97,331,612	4,914,978	n/a
Facebook Fans	27,963	11,411	1,202	n/a	n/a

Visitor Services	Jul-Dec '12	Jul-Dec '11	Jul-Dec '10	Jul-Dec '09	Jul-Dec '08
Adventure Center Walk-ins	3,776	3,970	3,457	n/a	n/a
Downtown Center Walk-ins	1,405	1,793	2,041	2,707	3,468
Visitor Van	4,291	3,745	4,714	5,706	8,850

Website	Jul-Dec '12	Jul-Dec '11	Jul-Dec '10	Jul-Dec '09	Jul-Dec '08
Unique Visitors	115,095	73,045	70,450	64,739	90,183

Membership	Jul-Dec '12	Jul-Dec '11	Jul-Dec '10	Jul-Dec '09	Jul-Dec '08
Total Membership	539	519	508	536	565

Community Relations	Jul-Dec '12	Jul-Dec '11	Jul-Dec '10	Jul-Dec '09	Jul-Dec '08
Media Coverage (local)	\$18,746	\$29,301	\$28,163	\$10,035	\$17,459
Media Stories	55	52	73	37	54
Press Releases	56	53	33	31	28
Presentations	14	31	21	19	18

Travel and Tourism: An Economic Generator

Return on Lane County Room Tax Investment

Travel Lane County is able to measure many (but not all) of its programs for estimated economic returns. Summarizing those quantifiable returns, a transient room tax TRT investment of \$803,404 by Lane County into Travel Lane County secured over \$16,641,000 in current and future economic impact to the county during the first half of FY13.¹

Private businesses contributed \$4,858 in in-kind donations, \$67,395 in dues, and \$104,357 in program support, to leverage Lane County's investment and increase Travel Lane County's overall effectiveness. Interns and volunteers contributed \$1,476 in labor. Media efforts extended the reach of Travel Lane County's budget by another \$116,370 during the six-month period.

Tourism in Lane County

Overall, travel spending reached \$543.2 million² in 2011, a 3.6 percent increase in spending compared to 2010. Made up primarily of small and medium-sized businesses, the visitor industry in Lane County employed an estimated 8,750 people and paid out \$165.9 million in wages in 2011.³

Tourism in Oregon

Travelers to Oregon contributed \$8.8 billion⁴ directly to the state economy in 2011, a 2.6 percent increase from 2010. Oregon's travel industry also supported 92,000 jobs and \$2.2 billion in earnings.

Tourism in America

In 2010, the U.S. travel industry received \$813 billion⁵ from domestic and international travelers, up 7.1 percent from the previous year. Travel expenditures directly supported more than 7.5 million jobs, generating \$194.5.4 billion in payroll income for Americans. Additionally, the industry generated \$124 billion in federal, state and local tax revenue.

Travel Lane County: A Private-Public Partnership

A recognized visitor industry leader, Travel Lane County continued to partner with business, civic, government, and community groups, including its 539 members. As a private, non-profit corporation, Travel Lane County is governed by a 30-member board of directors, including representatives from the Lane County Board of Commissioners and the Eugene and Springfield City Councils. Ex-officio board members provide additional links to city and county government.

Travel Lane County is funded by county TRT, paid by visitors staying overnight in commercial lodging and campgrounds. It receives 70 percent of three of the eight points of room tax collected by the County. This method of percentage-based funding sets up a healthy incentive; the better job Travel Lane County does at bringing overnight visitors and their dollars into the county, the more funds it receives to re-invest in marketing.

Travel Lane County's Mission

Travel Lane County supports the local economy by increasing the number of visitors to Lane County, with a focus on overnight visitors. Travel Lane County continues to implement marketing strategies to promote the Eugene, Cascades & Coast region as a convention, meeting, event, and leisure-travel destination. Ongoing areas of focus include convention and meeting sales and service, tourism marketing, visitor information services, membership and integrated marketing and community relations. Stewardship of our limited resources is a critical component of our continued success.

Lane County Room Tax Collections

Overall room tax collections remained steady, increasing just 1.6 percent during the first half of FY12.

Room Tax Collection Summary

	Jul-Dec '12	Jul-Dec '11	Jul-Dec '10	Jul-Dec '09	Change
Eugene	\$1,820,210	\$1,778,062	\$1,771,387	\$1,667,294	↑2.4%
Springfield	\$1,001,064	\$991,002	\$841,719	\$752,553	↑1.0%
Florence	\$321,237	\$370,256	\$362,667	\$325,409	↓13.2%
Cottage Grove	\$118,435	\$122,524	\$106,103	\$124,299	↓3.3%
Other	\$642,946	\$582,407	\$605,137	\$535,701	↑10.4%
Total	\$3,903,892	\$3,844,251	\$3,687,013	\$3,405,256	↑1.6%

Source: City of Eugene Transient Room Tax Collections Monthly Reports.

Lane County Hotel/Motel Statistics

Lane County's average occupancy rate during the period remained unchanged at 58% when compared to year-to-date 2011 figures, according to Smith Travel Research. Room tax collections are a function of both occupancy and rate. Key measures are summarized below:

	Jul-Dec '12	Jul-Dec '11	Jul-Dec '10	Jul-Dec '09	Change
Occupancy	58%	58%	58%	56%	No change
Average Daily Rate	\$85	\$85	\$82	\$83	No change
Room/Rev Par	\$49	\$49	\$48	\$46	No change

Source: Smith Travel Research

Eugene Airport Arrivals/Amtrak Rail Ridership

A total of 217,094 air passenger arrivals were reported during the first half of the fiscal year, up a 4.6 percent from the same period last year. Meanwhile, 80,990 passengers arrived or departed from the Eugene train depot via the Amtrak Cascades route during the first half of the fiscal year, an increase of 8.1 percent.⁶

Convention & Sports Marketing

Convention Marketing

Janis Ross, Vice President of Convention & Sports Marketing
Sue Harshbarger, Senior Convention Sales Manager
Juanita Metzler, Convention Sales Manager
Linda Norris, Convention Services Manager

Sports Marketing – Eugene, Cascades & Coast Sports

Janis Ross, Executive Director
Sue Harshbarger, Director of Sports Sales & Development
Kayla Krempley, Director of Event Operations

The Convention & Sports Marketing program continued its efforts to attract conventions, meetings and sporting events to Lane County. The staff's sales strategies to develop new business and maintain existing accounts during the first half of FY13 resulted in a direct economic impact of \$11.6 million in anticipated convention and event delegate spending. Trade shows, sales presentations, advertising, social media, direct sales calls and E-newsletters targeting meeting and event planners have been effective means of increasing overnight visits to Lane County.

The convention and meetings market continues to experience extremely slow growth. Many groups have postponed meetings, and there have been shorter lead times in group business booked. New government meeting restrictions have significantly affected that market segment as well.

Sports events bookings continue to remain strong. With the launch of the Eugene, Cascades & Coast Sports commission in 2012, our destination has become more visible to the local community and with national and regional sports events planners.

Business Booked	Jul-Dec '12	Jul-Dec '11	% Change
Delegates	80,205	90,456	↓11.4%
Room Nights	25,976	32,443	↓20.0%
EEl	\$11.6 million	\$17.6 million	↓34.1%

Leads	Jul-Dec '12	Jul-Dec '11	% Change
Total Leads Generated	103	82	↑25.6%
Generated (w/rooms)	95	66	↑43.9%
Confirmed	42	33	↑22.2%
Pending	18	22	↓18.2%
Lost	35	11	↑218.2%

Travel Lane County's confirmation ratio is 44% (42 out of 95 leads confirmed). 13 of the 42 confirmed leads (30.9%) and 15 of the 18 pending leads (83.3%) are new business. Of the 35 lost leads: two cited hotel rates quoted as too high; four cited air service into Eugene; hotels did not respond to four leads; two leads were lost because more full-service hotels were needed; one meeting was postponed; one meeting was cancelled; one lead required a local group to serve as host and they declined; and the remaining leads simply chose other destinations.

Sample Confirmations (Groups)	Meeting Year	Attendees	Scope
Oregon Department of Education	2012	200	State
Columbia Empire Volleyball Assn. Tournament	2013	4,000	Regional
Oregon Funeral Directors Association	2013	130	State
Biggest Loser Run/Walk	2013	5,000	State
Assn. of Bone & Joint Surgeons	2015	175	International

Pacing Report (calendar year)

Travel Lane County's pacing report is designed to better track and compare sales results against historical efforts. The pacing results for 2012 reflect the national industry trend of greatly decreased booking lead times for conferences.

Booked In:	Booked For:	Same Year	One Year Out	Two Years Out	Three Years Out	Four Years Out	Five Years Out	Totals
2012	Room Nights	10,717	25,829	3,318				39,864
	Delegates	30,089	68,458	24,680				123,227
2011	Room Nights	16,545	22,791	1,160	7,000			47,496
	Delegates	47,405	58,221	16,350	10,000			131,976
2010	Room Nights	15,799	17,790	140		2050		35,779
	Delegates	40,374	51,063	200		750		92,387
2009	Room Nights	19,382	14,775	2,120	360	6,050	4,650	47,337
	Delegates	45,679	36,629	1,610	2,000	15,650	15,000	116,568
2008	Room Nights	19,281	19,419	6,205	470	220		45,595
	Delegates	54,981	63,323	12,250	10,425	10,000		150,979
2007	Room Nights	20,649	15,280	23,825	3,820	18,000	35,000	116,574
	Delegates	55,433	42,549	78,370	5,500	59,100	151,000	391,952

Tradeshaw Participation

Participation in industry trade shows continued to play an important role in the sales team's marketing strategy. During the first half of FY13, the sales staff attended the following shows to meet with meeting and sports event planners to promote Lane County as a meeting destination:

SPINCon (senior meeting planners, all markets) – Telluride CO
 Bravo! Willamette Valley Showcase (all markets) – Salem OR
 TEAMS (sports) – Detroit MI
 Bravo! Event Showcase (all markets) – Portland OR
 Rejuvenate Marketplace (faith-based conferences) – Columbus OH
 Overseas Brats (military) – Washington DC
 Nursing Organizations Alliance Fall Summit (medical) – Nashville TN

Site Inspections

Travel Lane County assisted meeting and sports event planners with inspections of hotels, meeting facilities, sports venues and other areas of interest. The following groups came to Lane County to research the potential of holding a meeting, convention or event.

Veterans of Foreign Wars, 350 attendees – Pending for 2016 and 2017
 Association of Bone & Joint Surgeons, 175 attendees – Confirmed for 2015
 East-West Goodwill Games (shuffleboard), 65 participants – Confirmed for 2013
 Columbia Empire Volleyball Association, 10,000 participants – Pending for 2014
 Triple Crown Sports (youth baseball), 800 participants – Pending for 2015

Advertising

The Convention & Sports Marketing Department placed advertisements and participated in online advertising distribution by targeting meeting and event planners in the following publications: Northwest Meetings + Events, Meetings Focus, Sports Travel, SportsEvents, and Sports Destination Management.

Convention-Related Media Coverage

Travel Lane County continued to increase its editorial coverage in convention and sports-related publications. During the first half of FY12, earned media was valued at \$22,344, up by 31 percent over the previous period.

Editorial coverage promoted the Eugene, Cascades & Coast region as a convention, meeting and sports destination. Publications included Sports Events magazine, Smart Meetings magazine, Northwest Meetings & Events magazine, Sports Travel magazine, Sports Destination magazine and Meetings Focus magazine.

Sports Commission

Travel Lane County's sports commission brand, Eugene, Cascades & Coast Sports, will celebrate its one-year anniversary on January 30, 2013. The sports commission experienced a strong first year launch, with increased visibility throughout the county for our sports marketing efforts, and stronger positioning as a national sports events leader.

Eugene, Cascades & Coast Sports staff gave eight community presentations to Rotary Clubs and Chamber groups. Our 25-member Sports Advisory Council have held monthly meetings to strategize sports initiatives, evaluate bid opportunities, and provide general guidance to staff.

The sports commission raised over \$13,000 in cash sponsorships, generating additional revenue for the marketing the destination.

Convention & Sports Services

Travel Lane County's convention and sports service programs continued to provide comprehensive event support for conferences, meetings, events, retreats, weddings, and reunions. Services are designed to facilitate a smooth planning process, contribute to the success of each event, encourage attendees to explore our area and patronize member businesses, and build relationships with event planners that will result in return visits.

From July to December 2012, services were provided for 118 groups representing 121,005 delegates or participants. Services included the distribution of Lane County promotional materials to encourage event attendance; assistance with event planning, transportation, and activities; procurement of letters of support from local dignitaries; promotion of area attractions and tours to event attendees; distribution of welcome signs to member businesses; and on-site visitor information assistance.

As a liaison between event planners and Travel Lane County members, staff initiated 14 leads for services and information. These leads included requests for meeting space, bids to provide event services, promotional items for registration bags and gift baskets and special offers for event participants. Leads provided benefits to our members in the form of increased visibility and sales, and to event planners as a means to establish communication with local quality service providers.

Gift baskets, registration bags, and discount coupons were provided to various organizations, conventions, and events, including Oregon Cheer Coaches Association, Association for Direct Instruction, Western States Land Commissioners Association (Oregon State Lands), Safe & Civil Schools, Children's Land Alliance, Pacific NW Division Ski Patrol, USS Caperton, Western Association of Convention & Visitors Bureaus, Oregon Restaurant & Lodging Association, Oregon Association of Hospital Volunteers, Pacific Gospel Music Association, NALS – Association for Legal Professionals, Association for Direct Instruction, Pacific NW Division Ski Patrol, Western Association of Convention & Visitors Bureaus.

These items provided members with a showcase for their products and services, and strengthened relationships between Travel Lane County and the recipient organizations.

Convention & Sports staff served on planning committees for American Legion Baseball Regional Tournament, Living Proof Live with Beth Moore, Neighborhoods USA, Biggest Loser Run/Walk, NCAA Outdoor Track & Field Championships, IAAF World Junior Track & Field Championships, Oregon Restaurant & Lodging Association, Western Association of Convention & Visitors Bureaus.

Tourism Marketing & Sales

Natalie Inouye, Vice President of Tourism Marketing
Molly Blancett, Tourism Public Relations Manager

Meg Trendler, Tourism Sales Manager
Corrie Sizemore, Tourism Assistant

Travel Lane County's Tourism Marketing & Sales Department implemented marketing strategies to gain a greater share of the travel market. Regional and national advertising, cooperative marketing with regional partnerships, travel trade shows, and media outreach were strategies used to attract both group tour and independent leisure travelers. Tourism marketing efforts during the first half of FY13 resulted in more than \$4,669,610 in returns from inquiry generation, fulfillment and bulk brochure distribution alone.⁷

Leisure Marketing

Eugene, Cascades & Coast continued to be a draw for independent leisure travelers seeking easily accessible soft adventures; key experiences promoted through Travel Lane County's brand. The complementary experiences related to culture, culinary, events and scenic beauty were equally important to Travel Lane County's marketing efforts during the period.

Destination Advertising & Regional Partnership

A total of 42,142 visitor inquiries were received during the period as a result of Travel Lane County ad placements, leads, social marketing, public relations and referrals. Travel Lane County has spent less on destination advertising and more on social marketing efforts. One of the social media campaigns, utilizing Facebook ads and Google, targeted West Coast RV travelers. A total of 4,372,781 Facebook impressions were garnered, with clicks totaling 1,834 and 827 new page likes. We now have the ability to remarket directly to these new fans. The Google Pay Per Click campaign generated 314,010 total impressions with 746 clicks.

Visitor Inquiries	Jul-Dec '12	Jul-Dec '11	Change
Destination Advertising	2,235	7,972*	↓256%
Travel Oregon & Regional Partnership Leads	16,412	13,650	↑20.2%
Social Marketing	2,808	2,674	↑5.0%
Public Relations	5,812	4,219	↑38%
Referrals	<u>14,875</u>	<u>13,845</u>	↑7.4%
Total	42,142	42,360	↓0.5%
Facebook Fans	27,963	11,411	↑145%
Twitter Followers	2,973	2,368	↑26%

* Last year's destination ad total included 4,061 guide downloads from Oregon Spring Insert program, which was not repeated in the same period of FY13.

Willamette Valley & Oregon Coast Visitor Associations

Travel Lane County continued to play a leading role in the regional marketing efforts of both the Willamette Valley Visitors Association's (WVVA) and Oregon Coast Visitors Association (OCVA). For WVVA, Natalie Inouye served on the board of directors. Meg Trendler coordinated the tour/travel efforts with their WVVA counterparts and Molly Blancett serves on the PR team. WVVA marketing and PR efforts have focused on its Oregon Wine Country brand and the continued development of wine trails, which incorporate the region's complementary activities, dining and lodging options. For OCVA, this is a year of transition. A new executive director has been hired to lead OCVA through a complete reorganization. During this time, they have asked Travel Oregon to manage the regional plan.

Travel Trade Marketing

Travel Lane County continued to reach out to the group tour travel market. Interactions with travel trade resulted in 5 bookings which included one operator booking 150 rooms, 42 leads/partner referrals/service requests. Travel Lane County assisted with four research trips.

Travel Lane County FY13 Semi-Annual Report, July – December 2012

Media Relations/Editorial

The Tourism Department assisted media with articles, guidebooks and travel television shows, increasing exposure for Lane County nationally and internationally. Travel Lane County tracked articles valued at \$75,280 with a total circulation of 72,974,653. During the period, Travel Lane County assisted with two press trips and location/filming assistance for four projects, providing an opportunity for the Eugene, Cascades & Coast region to gain editorial coverage.

Social Media

The Tourism Department continued to grow its social media presence in the first half of FY13. Recognizing that the highly visual Pinterest is now the third highest social media platform, we have created a page and are developing marketing strategies to support it. We currently have 31 boards, 284 pins and 63 followers. Following the trend of the majority of internet users, Travel Lane County focused primarily on gaining and engaging Facebook fans. Engagement is a new measurement, but indicators show that we have strong engagement at our average of 2.02 percent. A mix of articles, blogs, photos, videos and questions about the region were posted through all social media channels, and were designed to engage and inspire the traveler who may be planning or considering a trip to the area.

Through partnership with the Willamette Valley Visitors Association, Travel Lane County was also able to regularly post items to the Through the Grapevine blog, Oregon Wine Country Travel Facebook feed and Pinterest page.

Social Marketing	Dec '12	Dec '11	Change
Twitter Followers	2,973	2,368	↑26%
Facebook Fans	27,963	11,411	↑145%

Film & Video

Travel Lane County supported a variety of film-related projects and events during the period.

Projects included:

- Research for a new movie about Opal Whitely of Cottage Grove.
- Locations for a John Deere commercial.
- Research for a short documentary on the Oregon Country Fair.

Oregon Bounty

This year's Oregon Bounty campaign focused on Travel Oregon's sponsorship of FEAST Portland. Travel Lane County hosted several journalists in connection with Feast, including Arthur Bovino from The Daily Meal, a content editor for TheFoodNetwork.com and bloggers from Serious Eats. Thus far, Travel Lane County's participation in FEAST has resulted in six articles (Tweets + articles).

Fall Foliage Promotion

Oregon Fall Foliage blog received 37,721 views during the 2012 season, August through November 2012. The blog added 69 followers from the previous year, rising from 108 to 177. The Oregon Fall Foliage Twitter account added 85 new followers, rising from 780 to 865.

Northwest Travel Magazine, Oregon Lakes & Rivers Magazine, Ride Oregon Ride, The Statesman Journal, and Grants Getaways all featured Eugene, Cascades & Coast destinations in their lists of best fall foliage tours, which helped increase traffic to the blog.

NBC News ranked the Eugene, Cascades & Coast region as the #2 place in the Northwest to see fall foliage.

Visitor Services

Natalie Inouye, Vice President of Tourism Marketing
Samara Phelps, Adventure Center Manager
Cari Soong, Adventure Center Assistant Manager
Adventure Specialists: Spencer Adrian, Jennifer Archer,
Matt Davis, Cally Deal, Grant Gurewitz, Amy Hill
Logan Rau, Ryan Sage, Corrie Sizemore, Tyler Strand

Visitor Services Specialists:
Janet Auxier, Victoria Clark, Rowene Watson

The Visitor Services Department continued to play an essential role in assisting visitors, while promoting the Eugene, Cascades & Coast region. The department lead Adventure Center, Downtown Visitor Center and Visitor Van operations, while fulfilling requests for information from visitors around the world. During the period, a new GeoTour was organized and launched bringing geocachers into the region to explore area venues and attractions.

Visitor Information Requests	Jul-Dec '12	Jul-Dec '11	Change	Estimated Economic Impact
Walk-ins:				
Adventure Center	3,776	3,970	↓4.9%	\$156,704
Downtown Center	<u>1,405</u>	<u>1,793</u>	↓ <u>21.6%</u>	<u>\$58,308</u>
Total	5,181	5,763	↓10%	\$215,012
Visitor Van	<u>4,291</u>	<u>3,745</u>	↑ <u>14.6 %</u>	<u>\$178,077</u>
Total	9,472	9,508	↓0.3%	\$393,089

Top Inquiry Interests and Markets

Travel Lane County tracked the top areas of interest from visitor requests and interactions during the period. In descending order, the top ten include: Oregon Coast, cycling, lodging, events/fairs/festivals, outdoors/nature/recreation, scenic drives/byways, wineries, shopping, arts/culture, culinary/food/restaurants. Out of area information and directions also ranked high.

Travel Lane County staff at the Adventure Center, Downtown Visitor Center and Visitor Van interacted with visitors to the area from all over the world. In descending order, top states included: Oregon, California, Washington, Arizona, Texas, Florida, Colorado, Illinois, Wisconsin and Utah. Top countries included: Canada, Australia, United Kingdom, Germany, The Netherlands, Japan, France, New Zealand, Switzerland and Thailand.

Adventure Center

The Eugene, Cascades & Coast Adventure Center increased Travel Lane County's overall interactions with travelers. The Adventure Center's proximity to area hotels, retail establishments and Interstate-5 provided opportunities to connect with travelers and steer them to businesses and attractions throughout the region. During the period, visitors and residents provided ongoing positive feedback regarding the center's offerings and the exceptional trip planning assistance and customer service they received from Travel Lane County's on-site Adventure Specialists.

Adventure Center Retail

During the first half of FY13, combined sales in the Adventure Center totaled \$25,816, up 128 percent over the same period last year. Retail sales accounted for \$10,552 (up 57%) and sales of tickets and pass total \$15,265 (up 233 percent). A total of 1,825 retail items were sold during the period, up 17 percent over the same period last year. A variety of new Adventure Center offerings and promotions, including adding the sale of National Forest Service Christmas tree permits, helped drive sales during the period. We now see repeat customers returning to the center for additional purchases. Inventory continues to represent locally-made or locally-inspired gift products and souvenirs.

Adventure Center Events

The Adventure Center has given Travel Lane County the opportunity to host both community and member events, while partnering with dozens of local agencies and businesses. These activities have spurred exposure for the center through media, member and community outreach. The Adventure Center hosted the following events during the period: Eugene, Cascades & Coast Kids' Adventure Club Family Days, monthly Tuesday Tastings, Western Association of Convention & Visitors Bureaus reception, GeoTour launch event and Travel Lane County's Holiday Open House. In July, the Adventure Center acted as the retail center for Track Town 12 memorabilia.

Eugene, Cascades & Coast GeoTour – McKenzie River edition

Travel Lane County launched the Eugene, Cascades & Coast GeoTour - McKenzie River Edition in October, making it only the 11th GeoTour worldwide. Leading up to the launch, two Geocaching 101 events were held to teach people how to geocache—one at the Adventure Center and one in the McKenzie area. The new tour was also introduced at the fall McKenzie River Area Chamber of Commerce meeting. The official launch day attracted more than 100 cachers (two-thirds from outside the Eugene and Springfield area) to the Adventure Center, where cachers picked up their GeoTour passports and embarked on the tour. Cachers who found at least 24 out of the 36 hidden caches, were eligible for a locally-designed GeoTour coin. Before the end of October, more than 50 coins were issued. From returned surveys, geocachers stayed at Harbick's Country Inn, McKenzie River Inn, Days Inn and Quality Inn the first weekend alone. A geocaching group from Portland declared the McKenzie River Edition the best geocaching event they had done and vowed to complete the tour and explore more of the McKenzie region this spring.

Visitor Guide Distribution

A total of 11,477 Eugene, Cascades & Coast Official Visitor Guides were distributed in bulk to welcome centers and visitor information centers throughout the state during the period. This resulted in an estimated \$1,149,962 in economic activity in Lane County during the first half of FY13.⁸

Volunteer/Internship Program

The Visitor Services Department continued to develop the volunteer program to support the Visitor Center and all staff departments. Volunteers served 123 hours, valued at \$1,476.

Membership & Integrated Marketing

Sally McAleer, Vice President of Integrated Marketing
Cari Garrigus, Membership Manager

Wendy Reetz, Marketing Assistant-Design
Taj Morgan, Marketing Assistant-Writer

Membership remains a critical component of Travel Lane County's marketing efforts. In addition to membership recruitment and retention efforts, the membership program helped members utilize Travel Lane County's marketing tools to promote themselves to visitors and other members. The increased integration of Travel Lane County's website and publications provide enhanced tools for marketing members and Lane County. The quality products and services members provide are key to the success of Travel Lane County and Lane County's visitor industry.

Membership Sales Travel Lane County's membership rose to 539 members during the period. While a total of 27 new or recovered members were gained, 26 were lost. Members contributed \$67,305 in dues revenue up 5.6 over last year at this time. We now offer a payment plan to help those businesses financially struggling, which impacts when revenues are coming in.

Membership	Jul-Dec '12	Jul-Dec '11	Jul-Dec '10	Jul-Dec '09
New Members/Recovered	27	24	25	35
Lost Members	26	23	34	30
Net Loss/Gain	1	1	-9	5
Total Members	539	519	508	536

Membership Meetings, Communications & Outreach Quarterly Market Your Business meetings informed members and prospective members about Travel Lane County, its benefits and marketing programs. Members also took the opportunity to present their businesses and services to Travel Lane County staff during three Member Spotlight presentations. In addition, a visitor guide launch party was held in October and a Holiday Open House was held in December.

Integrated Marketing The work under integrated marketing continues to pull together all facets of the organization's brand and program areas to ensure that all the publications, website, marketing materials and advertising are supporting each other.

Publication Production & Advertising Sales

- The *Eugene, Cascades & Coast Restaurant Guide* was produced and published in September 2012. The restaurant guide continues to be distributed through Certified Folder Display in area hotels as well as the Travel Lane County office, van and during conferences.
- The *Lane County/Eugene & Springfield Visitor Map* work began in October 2012. A total of \$16,240 was collected in revenue during the period with additional revenue expected to come in during the second half of FY13.

Adventure Center Sponsorship & Advertising Opportunities

Travel Lane County provides the opportunity to purchase sponsorships, brochure space and video advertising at the Adventure Center. To date we have 64 participants in the brochure distribution program, seven video ad participants and one overall Adventure Center sponsor bring total revenues to \$16,875.

Website Priority Listings

Travel Lane County continued selling priority website listings for \$1200 per year. A total of 11 spots have been sold, generating revenue to date of \$3,000.

Website	Jul-Dec '12	Jul-Dec '11	Jul-Dec '10	Jul-Dec '09
Visits	151,176	98,756	94,868	80,623
Unique Visitors	115,095	73,045	70,450	64,739
Page views	456,922	326,576	364,374	379,793

Community Relations

Lisa Lawton, Director of Community Relations

The Community Relations Department implemented a variety of programs and campaigns designed to gain exposure for Travel Lane County and the local visitor industry, and encourage countywide travel. Projects and programs included local television, website and magazine advertising, special promotions, an online photo contest, local media relations and Kids' Adventure Club events and outreach.

	Jul-Dec '12	Jul-Dec '11	Jul-Dec '10	Jul-Dec '09	Change
Media Coverage (Lane County)	\$18,746	\$29,301*	\$28,163*	\$10,035	↓56%
Media Stories & Articles	55	52	73	37	↑5.8%
Press Releases	56	53	33	31	↑5.7%
Presentations	14	31	21	19	↓55%

* FY11- Includes extensive FIMBA International Masters Basketball Championship Coverage. FY12 - Includes the "All in a Day's Drive" television campaign coverage.

Media Coverage (Lane County)

A total of \$18,746 in editorial coverage about Travel Lane County, the local visitor industry and the Eugene, Cascades & Coast region was generated through press releases, e-newsletters and media interviews with local newspapers and broadcast stations. Coverage included stories about convention delegate and sports event impacts, new hotel development, Matthew Knight Arena bookings, new Travel Lane County staff and board members, the new Eugene, Cascades & Coast GeoTour, as well as the Eugene, Cascades & Coast Dining Guide, Photo Contest, Kids' Adventure Club and Tuesday Tasting events. An ongoing partnership with KUGN radio continued to provide weekly on-air opportunities to promote community events along with Travel Lane County's online event calendars, visitor centers and other resources.

The Community Relations Department also generated editorial coverage promoting the Eugene, Cascades & Coast region as a destination for conventions, meetings, events and sports.

Advertising Campaigns

Travel Lane County promoted adventure-themed activities and resources through an advertising partnership with Mom Magazine, directed at families throughout Lane and Linn counties. During the period, Travel Lane County provided articles through the voice of 'Adventure Mom' focused on cycling, sandboarding, hiking and snow tubing, and other recreation and outdoor-focused activities. Additional articles on fishing and geocaching were published in connection with the overall campaign. Online promotions and Kids' Adventure Club ads were also featured, increasing the mailing list of club members. Travel Lane County's logo, website, contact information, Adventure Center hours of operation, links to mentions and other relevant web pages were prominently featured in each article.

Travel Lane County participated in KMTR-TV's "All in a Day's Drive" winter television advertising campaign, which promoted the Adventure Center as a resource for winter adventures in the Eugene, Cascades & Coast region. The ad can be viewed at: www.EugeneCascadesCoast.org/media.

Advertising partnership were also renewed with the Eugene Weekly and Eugene Magazine, facilitating discounted advertising opportunities for Travel Lane County members.

Kids' Adventure Club

The Eugene, Cascades & Coast Kids' Adventure Club entered its third year. Quarterly Adventure Club events, newsletters, and monthly event calendars promoted the region's seasonal activities, while encouraging families to get out and explore the area. In October, a Fall Family Day event at the Adventure Center provided a morning of hands-on activities, crafts and promotions centered on the region's harvest, agri-tourism, fall foliage

and hiking opportunities. Kids were also invited to join the Junior Leaf Reporting Program, which connects to the Oregon Fall Foliage blog. During the period, planning got underway for a Winter Family Day event featuring a partnership with Hoodoo Ski & Recreation Area, Willamette Pass and Berg's Ski and Snowboard Shop.

Since the launch of the first Kids' Adventure Club in Fall 2010, the club membership list has grown to 409 family subscribers, representing approximately 1,227 parents and kids. An average of 75 kids/parents are currently participating in each quarterly family day event held at the Adventure Center, bring an estimated 300 people to the Adventure Center annually.

Eugene, Cascades & Coast Photo Contest

The Eugene, Cascades & Coast Photo Contest expanded to 11 categories. A partnership with the City of Eugene continued and new partnerships were formed with the Springfield Chamber of Commerce, the McKenzie River Chamber of Commerce and OBEC Consulting Engineers. Each partner sponsored a photo category and provided prizes to winning photographers. Overall, 21 members provided more than \$1,800 in prizes to winners in exchange for contest-related publicity. Press releases and social media outreach further promoted Travel Lane County and contest winners. More than 65 images, valued at an estimated \$6,500 were permanently secured for Travel Lane County's free use for editorial and marketing purposes.

Community/Member Outreach

Travel Lane County staff connected and partnered with local community and business groups throughout the county, attending 148 local meetings and events and making 14 presentations to business and community groups. This outreach helped generate awareness about Travel Lane County programs and the benefits of Lane County's tourism industry.

Industry Outreach & Support

During the period, the Community Relations Department assisted with the first statewide Travel Oregon/Oregon Tourism & Hospitality Consortium Listening Tour in Eugene, provided communications to members about the Transient Room Tax Task Force, and produced Travel Lane County's annual report and Tourism Industry News e-newsletters.

Administration

Kari Westlund, President & CEO

Karyn Mieloszyk, Director of Finance & Administration

Industry and Community Leadership

Travel Lane County staff serve on many state, regional, county and community boards and commissions that intersect with tourism and the visitor industry.

Kari Westlund serves as chair of the statewide Tourism & Hospitality Consortium, vice-chair of the Arts & Business Alliance of Eugene and is a member of the Lane Economic Committee among others. Natalie Inouye serves on the board of the Willamette Valley Visitors Association, the Oregon Coast Visitors Association, Oregon Destination Marketing Organizations, the Oregon Scenic Bikeways committee, Covered Bridges Scenic Bikeway Committee and the McKenzie River Tourism Committee. Janis Ross serves on the board of the Oregon chapter of Meeting Planners International. Lisa Lawton serves on the board of the local chapter of the Public Relations Society of America. Sally serves on the Oregon RV Alliance board and Ski Oregon. Samara serves on the board of Nearby Nature and the Public Lands Frontliners committee. Meg serves on the Oregon Tour & Travel Alliance and the Lane County Cultural Coalition.

Travel Lane County Board

Travel Lane County has a governing board of 30 members made up of visitor industry and community leaders representing a wide range of businesses, organizations and governmental entities. During the semi-annual period, the Executive Committee included Board Chair Richard Boyles, Vice Chair George Rogers, Treasurer Robert Canaga, and Past Chair Maxine Walton. Mike Drennan and Martin Alletson also served on the Executive Committee. Lane County Administrator Liane Richardson, Springfield Councilor Joe Pishioneri, and Eugene Councilor George Poling served as liaisons to county and city government. During the period, Pat Straube, executive director of Dari Mart stores Lorrie Normann, owner of Winery Speak Consulting and co-owner of Wine Events Oregon, joined the board. For a current list, see the Travel Lane County Board of Directors attachment to this report.

In-Kind Support

In-kind donations, valued at \$4,858 were received in connection with travel writer/media visits, visitor van access to fair and festivals, as well as member donations supporting trade shows, conventions, events and Travel Lane County's photo contest. Travel Lane County received 123 hours of donated work through volunteers and interns, valued at \$1,476.

Footnotes & Sources

1. \$11,578,301 from convention sales bookings, \$3,519,648 from inquiry generation and related visitor guide/mail fulfillment, \$215,012 from visitor information center operations, \$178,077 from mobile visitor van operation, and \$1,149,962 from bulk brochure distribution. No economic returns from trade shows, group tour sales, international sales efforts or film and video are included.
2. Lane County Travel Impacts 1991-2011p. Prepared for Travel Lane County by Dean Runyan Associates, May 2012.
3. Ibid.
4. Oregon Travel Impacts and Visitor Volume. Prepared by Dean Runyan Associates for the Oregon Tourism Commission, May 2012.
5. Travel Industry of America 2012p Report.
6. Reports from Eugene Airport and WSDOT State Rail & Marine Office.
7. \$3,519,648 million in inquiry generation and related fulfillment and \$1,149,962 million in bulk brochure distribution, for a total of \$4,669,610.
8. Research by the Oregon Tourism Commission and StoryCo has shown that 60 percent of visitors to Oregon are influenced to visit additional destinations by visitor guides and promotional materials received in visitor information centers. Throughout the period, Travel Lane County sent 11,477 visitor guides through bulk distributions. Using the 60 percent factor, and the average party expenditure of \$167 per day, identified in the 2008 statewide visitor profiles, and assuming a half day in Lane County, the total economic impact is \$1,149,962.

Formulas

Overall Returns: \$11,578,301 (convention bookings); \$3,519,648 inquiries/fulfillment); \$215,012 visitor center operations); \$178,077 (mobile van operations); \$1,149,962 (bulk brochure distribution). Total: \$16,641,000

Convention Sales Bookings: Economic impact is determined by multiplying the number of delegates by the number of event days by \$166. The economic impact is estimated at \$11,578,301.

Inquiry Generation: GMA Research identified an overall conversion rate of 20 percent. $18,647 \text{ inquiries} * 20\% = 3,729$
The average party spent \$363 per group, per trip and \$181.50 per group per day. $3,729 * 363 = \$1,353,627$. In addition, 32 percent of inquiries plan to visit within two years for an additional economic impact of \$2,166,021 ($18,647 * 32\% = 5,967 * \$363 = \$2,166,021$). Total tourism marketing efforts = $\$1,353,627 + \$2,166,021 = \$3,519,648$.

There are additional impacts to our economy from transportation spending, but it's difficult to identify how much of that spending supports local jobs and/or comes to the Eugene Airport and Eugene-based fuel and service providers. Additional impacts are a potential result of FY12 marketing efforts. Of the 18,647 inquires, 32% plan to visit sometime in the future or *beyond two years* ($18,647 * 32\% = 5,967 * \$363 = \$2,166,021$). This additional impact is *not* included in FY13 measurable returns.

Visitor Information Center and Mobile Visitor Van Operations: Travel Lane County estimates facilitating a half-day average extension for walk-in visitors. The Downtown Visitor Center and the Adventure Center served a total of 5,181 visitors with \$83 per full day average spending, for an estimated impact of \$215,012. The Mobile Visitor Van served 4,291 for a total of \$178,077.

Media: Travel Lane County has been directly or indirectly responsible for print, broadcast, and film exposure of Lane County, but has limited tracking ability. Media exposure generated from national/international efforts on the leisure side, that Travel Lane County was able to track, was valued at \$75,280. An additional \$22,344 in free media editorial was generated through national convention-related coverage. Editorial generated through Lane County media sources totaled \$18,746. The total media coverage value was \$116,370.

Bulk Brochure Distribution: Research by the Oregon Tourism Commission and StoryCo has shown that 60% of visitors to Oregon are influenced to visit additional destinations due to visitor guides and promotional materials they pick up in visitor information centers. Travel Lane County distributed 11,477 Lane County Visitor Guides to visitor information centers during the period. Using the 60% factor, a half day stopover and the average party expenditure of \$167 per day identified in the visitor profiles mentioned above, total economic impact is \$1,149,962.