

TRAVEL LANE COUNTY
ANNUAL REPORT

FY2023

**EUGENE
CASCADES
AND COAST**

Gold Medal Performance

Fiscal year 2023 began with an epic track and field competition as athletes, coaches, volunteers and spectators came from around the world for the World Athletics Championships Oregon22.

The fiscal year ended with yet another stellar line-up of track and field events that extend through the summer and into the fall as Eugene hosts the Wanda Diamond League Prefontaine Meet in September.

This region's easy-to-reach, uncrowded natural environments are the foundation of our visitor economy, however, built environments play an increasingly important role. Recognizing the importance of this built infrastructure, both rural and urban communities in Lane County are looking at investments that drive year-round tourism activity.

Oakridge envisions a pump track to build upon its mountain biking success, Lowell's Dexter Reservoir continues hosting high-caliber rowing events and is looking to add additional docks to attract more championship events, and in the metro area, both Eugene and Springfield look to add additional conference space or other winter demand generators such as a multi-use indoor sports facility.

Recognizing that economic prosperity, a healthy environment, and respect for people equals people

and place well-being, Travel Lane County's board of directors adopted a multi-year strategic framework to align the visitor industry and community interests in a stronger economic, environmental and social future based on shared values.

Our industry sector continues to grow and is anticipated to be Lane County's fastest-growing sector over the coming decade. More than 11,000 of our friends and neighbors are fully engaged in welcoming residents and visitors and we look forward to working with workforce partners to find ways to attract and retain a future workforce that creates great Oregon experiences for visitors to the Eugene, Cascades & Coast region for years to come.

The following pages summarize the past year's successes and challenges. It highlights the growing importance of data gathering and how this data is shaping our marketing decisions today and in the future. We appreciate the support of our industry partners, residents and elected officials who support the Eugene, Cascades & Coast region as a premier visitor destination, and we look forward with great excitement to the coming year as we welcome millions of visitors to this place we call home.



Promise

The Eugene, Cascades & Coast region has Oregon's greatest variety of adventures in easy to reach, uncrowded places.

Mission

Grow overnight visitors for a vibrant, year-round and county-wide economy.

Why

We believe our work inspires people to experience and appreciate Lane County, creating opportunities, a sense of place and stronger communities.

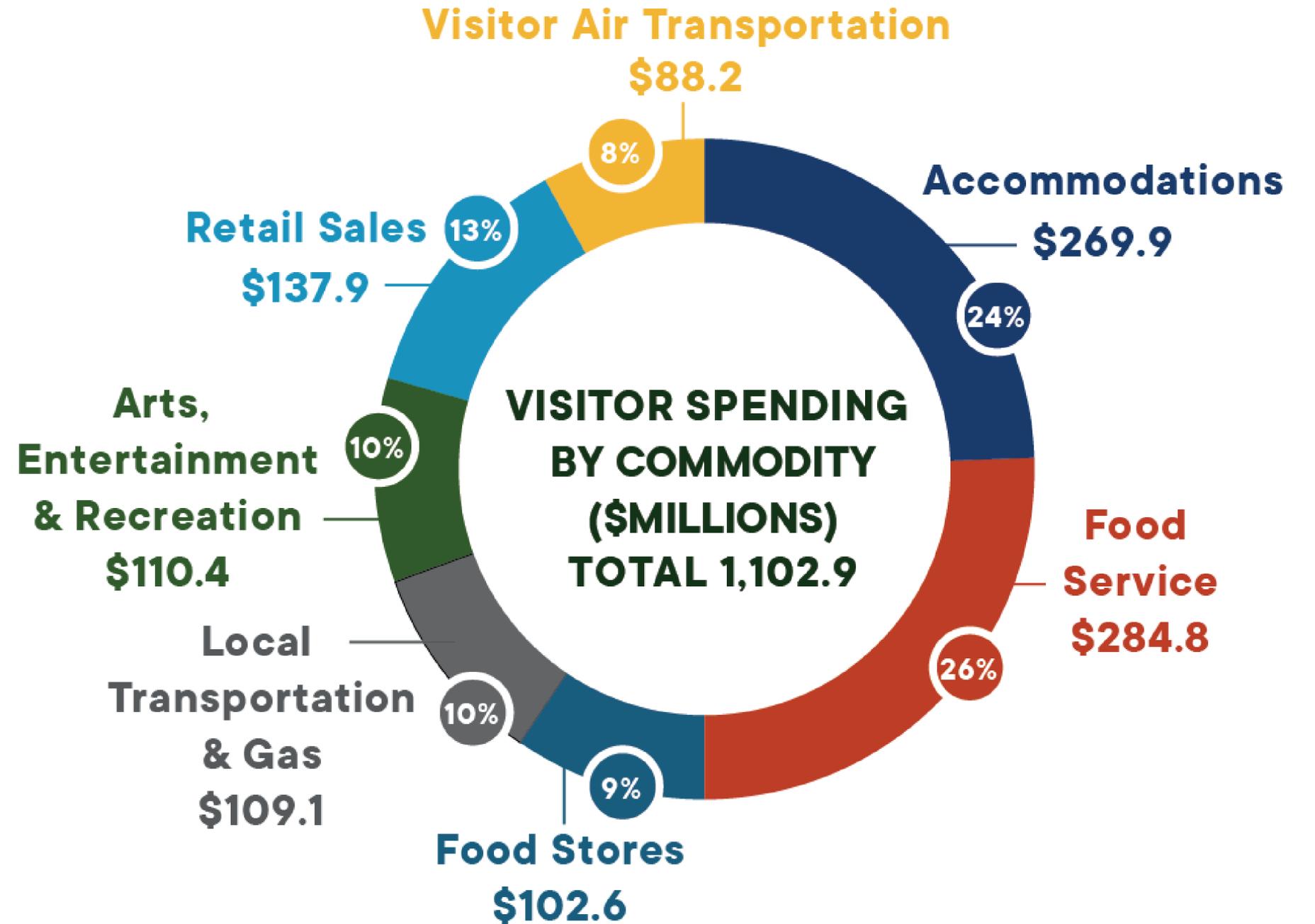
Vision

Travel Lane County is a recognized leader in achieving year-round economic growth throughout the Eugene, Cascades & Coast region through innovative destination marketing, product development and exceptional visitor experiences.

Record Travel Spending

While individual business stories vary, hosting the World Athletics Championships was an economic driver, a big win, and a shining moment in a strong year. Overall, the multi-day event reportedly generated a direct economic impact of \$153.4 million. Travel Lane County was proud, grateful and humbled to have received the Governor’s Tourism Award for our work as part of the broad team of government agencies, the Oregon22 local organizing committee and many volunteers.

Leisure travel drove another strong year as direct visitor spending topped \$1.1 billion and total travel spending reached an all-time record of \$1.4 billion. Lodging rates and room demand paired to increase accommodations spending to a greater than normal percentage of overall spending, but once again it was food and beverage spending (categorized as Food Service and Food Stores) that led the way as 35 cents of each visitor dollar was spent in this sector.



Source: Dean Runyan & Associates, 2022

Aligning for Resilience

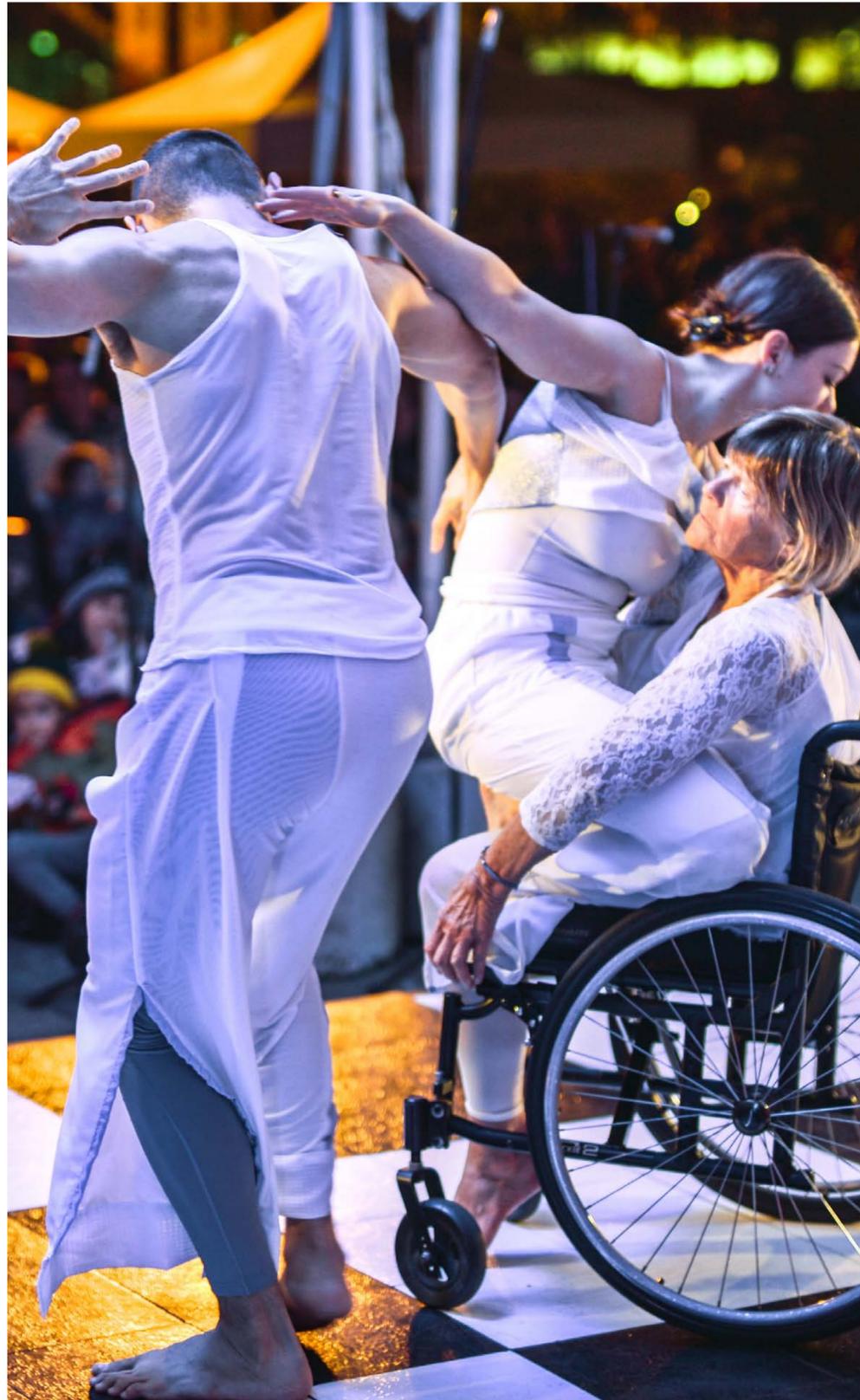
In early 2023, Travel Lane County funded a countywide survey called Destination NEXT to hear from our stakeholders, and several things came through loud and clear. Scores and comments showed stakeholders see infrastructure and homelessness as key opportunities for destination improvement, and there's room to improve on a cohesive sense of being on the same team around rural versus metro, coastal versus inland and arts versus sports.

Learnings from the Destination NEXT survey provided a foundation from which the Travel Lane County board of directors developed a multi-year strategic plan. The strategic plan, titled Aligning for Resilience, addresses the themes the board heard and ensures our work as an organization continues to build at the intersection of quality of visit for our target markets and quality of life for residents.

Our four focus areas include:

- Destination development and management
- Leadership in supporting a values-driven future
- Maximizing visitor and resident experiences
- Succession planning

We want all visitors to feel welcome and have meaningful experiences throughout Lane County. These filters also serve resident needs and create a stronger and more resilient community.



Business Intelligence Drives Returns

I had the best time exploring downtown Eugene and checking out the Farmers Market, 5th Street Public Market, etc. I especially enjoyed urban wine tasting, this is such an asset to the incredible town!

-Tracy Kaler, Travel Mag

Travel Lane County’s tourism team strategically utilizes a combination of paid, earned and owned media channels to bolster promotion efforts for the Eugene, Cascades & Coast region. Through paid media, targeted investments across digital, print and broadcast channels reach a broader audience and drive engagement.

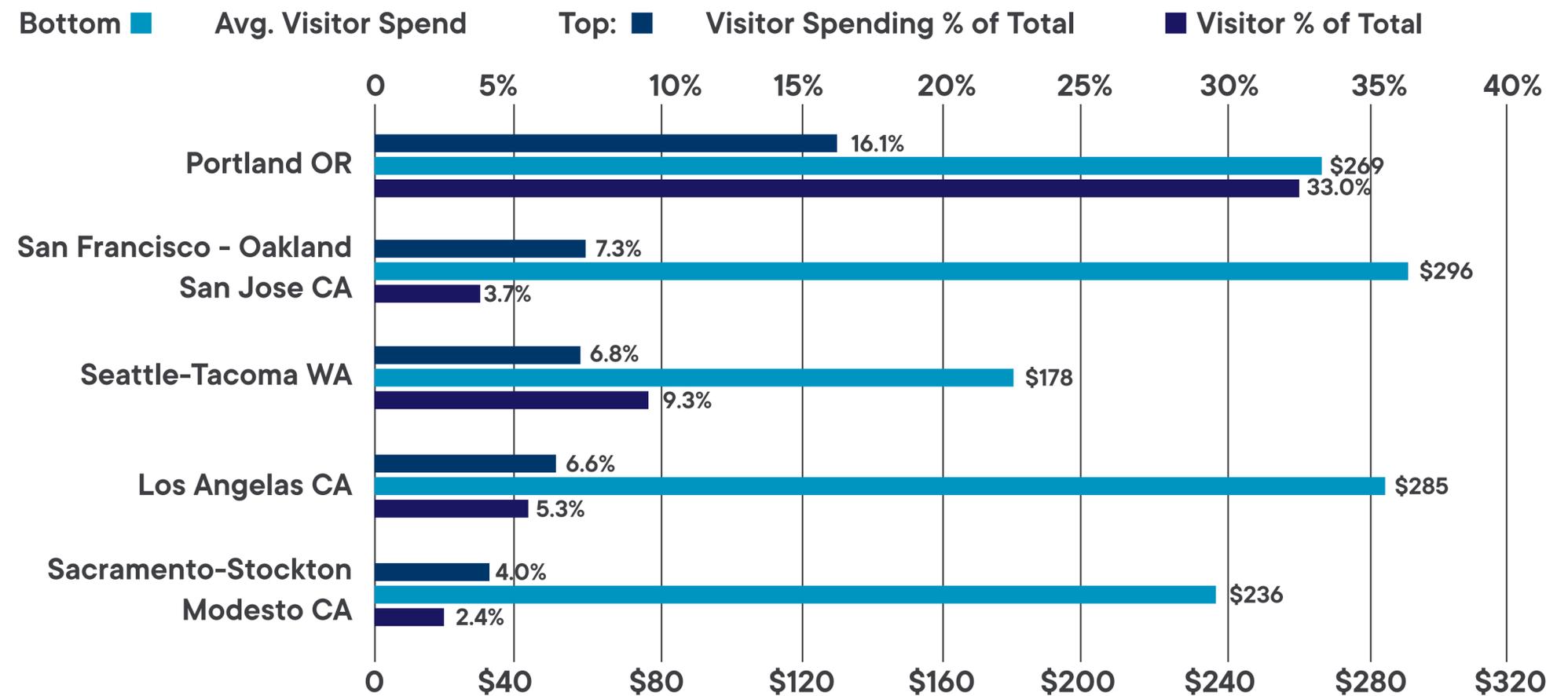
New data-gathering and analysis tools are paying dividends and now inform our paid advertising investments better than ever before.

Insights on visitor spending and visitation show key markets of Portland, Seattle, Los Angeles and San Francisco are spending and visiting at a high threshold. Understanding where visitors are coming from, the points of interest they frequent and how much they spend enabled the tourism marketing team to develop a campaign that included key targeting to the San Francisco Bay Area, resulting in more than 29 million impressions in that market alone. That pairs with an additional 53 million impressions from our “always on” media campaigns

and 368,000 clicks to our website’s targeted content. The San Francisco region’s rise into our top five visitor points of origin (see chart) ratified this work. Earned media results for the fiscal year saw impressions were up 224% year over year, with more than 403 million estimated eyes on stories, and 34 top-tier stories that hit on destination key messages and themes were secured.

The tourism marketing department developed a resident-focused campaign called Explore. KMTR co-op advertising packages, print in local publications such as the Eugene Magazine and Oregon Family Magazine and digital advertising and social media support directed folks back to the Explore section of our website.

City - Top 5 Visitor Spend DMAs Compared to Visitation



Source: Zartico, 2023

Sports Scores Wins Throughout Lane County

This spring's rowing events at Dexter Reservoir proved to be an extraordinary success. The picturesque location, coupled with the efficient organization by event planners and participation from rowing enthusiasts, contributed to the triumph. The events witnessed record attendance, creating a vibrant and competitive atmosphere that delighted participants and spectators alike. The success of these rowing events further solidified Dexter Reservoir as a premier destination for rowing competitions and bolstered the region's appeal for sports tourism.

Our team is a group of seasoned event operators.

Maybe once a year they return from a race truly excited about the event and host. I'm here to tell you, they came back glowing and were completely blown away by you, your team and the track crew. You guys completely exceeded their expectations and even weeks later they are still talking about what a great event you hosted. THANK YOU.

- John David, Chief Strategy Officer, USA BMX

New room nights booked nearly doubled this past year as we logged 9,718 compared to 4,863 in the previous year. The economic impact of sports events increased by nearly \$3 million to \$13.6 million in FY23. We were privileged to host a number of first-time regional and national championship events, including the USA BMX Lumberjack Nationals, the PDGA Tim Selinske

US Masters Championships, and the USRowing Northwest Regional Masters Championships.

The Explore campaign helped to build participation and attendance, which brought a combined estimated economic impact of over \$2.6 million to the region.

Cycling events, including the Oregon Gran Fondo and the Sasquatch Duro, rolled through the region over the summer. Competitive cycling is growing in popularity.

The Sports Commission worked with event organizers, including several national governing bodies, to provide customized service plans for events of all sizes. In total, we worked with 33 events, servicing over 40,000 athletes and fans. This work included specific partnership matching programs for events, on-site activations including an event mascot, and strategic partnerships to enhance event registration and attendance.

Sports marketing garnered a record 39 stories, beating last year's 37 stories. We ended the year with a 39.6% newsletter open rate, well above the industry average, and exceeded the website impressions goal with sports planners and events rights holders seeing an average of 3,139 monthly impressions.





Conventions Coming Back

The WineMakers Magazine Conference brought in \$374,092 in estimated economic impact to the region in May. The event qualified for the Planner Incentive and received \$2,195, which they used to sponsor an added event while in town. The additional event showcased 14 local wineries, breweries, distilleries and cider houses. After the event, the group posted a testimonial on LinkedIn and provided an RFP for a new event.

Eugene was a wonderful location to have our event, and working with you, Juanita, made the experience even better. Thanks for your support and help. I know our attendees left really loving their time in the beautiful southern Willamette Valley and Eugene.

-Brad Ring, President of Battenkill Communications and host of the WineMakers Magazine Conference



Industry trends show that associations are part of the fastest-growing portion of planners actively working on leads and events and that group sizes remain small. A majority of planners believe that their 2023 group size will be 76-90% of pre-COVID size. Booking windows are shorter, with nearly 90% of planners working in a window of less than 12 months.

Conventions staff implemented Destination International's Economic Impact Calculator (EIC)

for events. This tool is utilized by over 300 destination organizations worldwide and is the global standard for measuring net new money coming to a community because of meetings and events. The EIC is already paying dividends with planners thrilled when they receive a post-event EIC report that includes a high level of detail.

New group bookings comprised 60% of total group bookings and were up 20% over last year.

We confirmed 11,402 room nights and although down from 16,627 last year, the estimated economic impact (EEI) was up slightly at a solid \$9,832,507.

Convention Services worked with 140 groups, sending out five service leads and 48 partner referrals, serving a total of 22,615 attendees. 30 groups were local, 43 were statewide, 19 were regional, 32 were national and 16 were international.

Convention marketing exceeded its website impressions goal with an average of 3,733 impressions per month. It ended the year with a newsletter open rate of 33.5%, well above the industry average, and exceeded the earned media goal with 9 stories in top-tier trade media.

EugeneCascadesCoast.org Reimagined

Our newly launched EugeneCascadesCoast.org website features a modern design, intuitive navigation, and enhanced user experience while maintaining the core focus of being the trusted source for destination inspiration and information. In the wake of this massive undertaking, **a record-setting 1.1 million users visited the website** with more than 1.4 million sessions over the fiscal year.

I have never seen such a robustly inclusive tourism website as Eugene, Cascades & Coast. Give yourself a pat on the back for making it clear that all are welcome!

-Jennifer, travel blogger

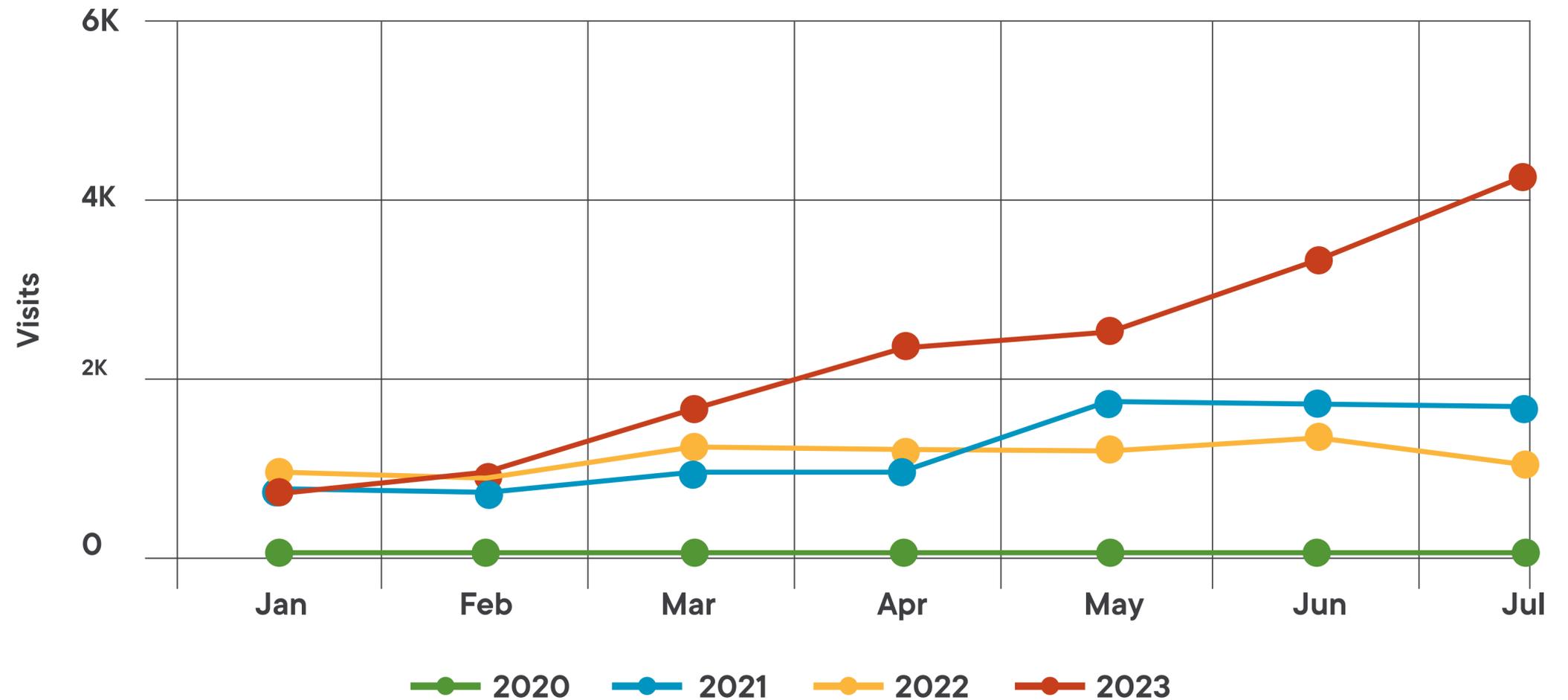
The website launch provided an opportunity to refresh and build new and exciting content throughout the site's more than 400 pages and 300 blogs.

The redesign gave us the opportunity to integrate AudioEye, a leading website accessibility platform that enables website visitors to customize their browsing experience to meet their specific needs related to vision, hearing, motor and cognitive abilities.

Our focus on intuitive design pays off when we look at the steep increase in people who are using our online booking search engine, BookDirect. The increase correlates exactly with the launch of the website in March 2023.

Book › Direct - Performance Summary

Year-over-Year Search Trends



The Integrated Marketing team added more than 400 new destination photos & video selects to our media library. A new destination video highlights the beauty and breadth of experiences visitors may choose from when exploring the region.



Sharing the Industry Story

Travel Lane County’s stakeholder relations team executed an effective outreach strategy to tell the organization’s story within the local community through strong relationships with media outlets, community stakeholders, elected officials and businesses, resulting in an impressive 70 earned media placements that generated over 58 million impressions.

Travel Lane County and the Springfield Area Chamber of Commerce share several economic development and membership goals, so it’s natural that we partner on events that mutually serve our business community.

We appreciate Travel Lane County for sponsoring our Business After Hours event at Lithia Toyota of Springfield this past year. The event demonstrated our shared commitment to deliver the best possible experience and value to our members and we look forward to each and every opportunity to do so again.

-Vonnie Mikkelsen, President/CEO Springfield Area Chamber of Commerce

By leveraging these connections, the team secured a partnership with Lithia Toyota of Springfield, a prominent local business.

Travel Lane County was prominently featured in each ad of the “Let’s Go with Lithia Toyota of Springfield” commercial series, amplifying brand visibility. Local businesses and destinations highlighted in the ads

received substantial exposure, and Lithia Toyota’s collaboration showcased their commitment to supporting the local community, enhancing their reputation.

In preparation for the 2023 Oregon legislative session, Travel Lane County met with most of our area representatives and senators to discuss key hospitality topics. Public official briefings also took the form of city council presentations as updates were provided to Lowell and Oakridge.

Visitor Services outreach geared up for the busy summer season, and for a second year visitor services provided weekend coverage by staffing a welcome table at the 5th Street Public Market’s Market Alley.

Visitations to the Eugene, Cascades & Coast Visitor Center dropped to 2,005 in FY 23 and continued to be lower than pre-pandemic levels. Sales of parks passes and permits rose slightly to \$7,533. Efforts to increase awareness of the opportunities to learn about the region and buy park passes, maps and locally made retail items included a book signing by local author Danuta Pfeiffer, along with television, print and social media advertising as part of the local Explore campaign.



Destination Management

Travel Lane County's Hearing Loop Program kicked off in FY23 with the goal of making Lane County's attractions more accessible to individuals with hearing loss. A total of 26 lodging properties and attractions have been looped to date, and another 4 locations are in process. With additional funding secured through a Travel Oregon grant, the staff is excited to work with partners throughout the region and to continue the early momentum the project has generated.

We are thrilled with the commitments that Travel Lane County and its hospitality partners have made to installing hearing loops throughout the county, which are making travel easier, safer, more inviting and more comfortable for the thousands of area visitors who have hearing loss.

- Sue Prichard, Co-Chair, Loop Lane County Committee

We've been honored to partner with The Shedd Institute's Loop Lane Committee, whose vision to help people with hearing loss have full access to better hearing each day aligns well with our vision of ensuring all visitors have full access to all of the great Oregon experiences that can be found in the Eugene, Cascades & Coast region.

Travel Lane County and the Willamette Valley Visitors Association co-funded a trail accessibility project with the University of Oregon's Environmental Leadership

Program. Students accessed slope, trail surface and other attributes. The information can assist individuals in deciding whether they feel the trail is accessible to them and their specific needs. One potential long-term outcome may be the creation of trailhead signage that conveys accessibility information in a simple and easily understandable format.

Following the county's adoption of the Lane County Bicycle Master Plan, two exciting projects were reactivated. The Connect Lane Bicycle Wayfinding project and the proposed designation of the Aufderheide as Oregon's newest Scenic Bikeway provide opportunities to build upon strong regional cycling assets and will be a focus during FY24.

Collaboration with local businesses, government agencies, and cycling enthusiasts will allow Lane County to develop a comprehensive and user-friendly series of routes, attracting cyclists from far and wide.



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