

**Wilsonville Tourism
Development Strategy**

**Fieldwork
Research Report**



Total Destination Marketing

December 2013

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Introduction

This report provides background material and records from the research and community consultation conducted by Total Destination Marketing during the Wilsonville Tourism Development Strategy Assessment phase during October and November 2013.

The review comprised extensive research and consultation involving stakeholders inside and outside of the city.

The research to date has included:

- Tourism Task Force meetings held October 24 and November 12
- Face to face interviews
- Stakeholder workshops
- An online survey that captured the comments and opinions of residents and interested stakeholders
- Telephone interviews with selected tourism executives outside of Wilsonville
- Destination audit and destination site inspections
- Internet and social media analysis
- Desk research of niche markets
- Review of the strategies of Clackamas County (CCTCA), Washington County (WCVA), Travel Portland and Travel Oregon
- Attendance at tourism forums of relevance to Wilsonville involving bike tourism and French Prairie visitor information.

1. Face-to-Face Interviews

The following is a summary of comments received during interviews conducted with 16 participants from October 14 to November 17, 2013. Participants included:

Name	Title	Affiliation
Patty Brescia	Senior Programs Manager	City of Wilsonville
Jeannine Breshears	Destination Marketing Manager	Clackamas County Tourism & Cultural Affairs
Jeff Brown	General Manager	Holiday Inn South Portland/Wilsonville
Danielle Cowan	Executive Director	Clackamas County Tourism & Cultural Affairs
Steve Gilmore	CEO	Wilsonville Area Chamber of Commerce
John Hanna	Club Manager	Willamette United Soccer Club
Darren Harmon	General Manager	Family Fun Center
Jae Heidenreich	Tourism Development Manager	Clackamas County Tourism & Cultural Affairs
Al Levit	Commissioner	City of Wilsonville Planning Commission
Carolyn McCormick	President / CEO	Washington County Visitors Association
Chris Neamtzu	Planning Director	City of Wilsonville
Stan Sherer	Parks & Recreation Director	City of Wilsonville
Brian Stevenson	Parks Coordinator	City of Wilsonville
Mary Stewart	President	MARStewart Creative Group
Tony Thacker	Executive Director	World of Speed

1. What do you consider to be the TWO greatest tourism STRENGTHS of Wilsonville?

- Advantages of location for accessing a variety of wider experiences like shopping and wineries (but wineries are better accessed from other places like McMinnville and Newberg; Wilsonville is not Wine Country).
- Agri-tourism
- All the work on developing 'Horse Country' has been very valuable.
- Better location for business (lodging, meetings, etc) – much easier to access than the Jantzen Beach area hotels by comparison.
- Close proximity to French Prairie
- Equestrian facilities, events, reputation and focus – fantastic potential – well placed to be the premier destination for equestrian shows and equine tourism in the Northwest if play cards right. The facilities and location (right off the I-5) are a real strength. Year round activity occurring, with clinics and classes and more. High end equine store opened and operating.
- Exceptional way the City Council realizes how important tourism is, but still has to lift it status in terms of actual development and investment priorities – the economy is the number one issue in terms of payoffs here, so create more and stronger reasons why people would want to be and visit here.

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- Fairly strong corporate and business markets underpinning city economy and hospitality industry
 - Family Fun Center: 2 comments
 - Family Fun Center is helpful but not a destination on its own.
 - Fantastic little city surrounded by rural areas and Oregon Horse Country
 - Great central location for people for meetings – for business/committee meetings. For example, Oregon City, Clackamas County, Washington County, Salem. Half way between Portland or point of origin and Salem for many of these. Meetings held at Lake Oswego Grill, Starbucks, McMenamins patio, etc. Water Treatment Plant with its nice gardens also has a conference room that takes 15 to 20 people. Hotels service meetings as well.
 - Horse shows and related activities help set Wilsonville apart, but more should be done to involve community and attract wider audience than ‘horse people’ alone. The potential interest and opportunity exists but marketing and education and commitment needed.
 - Hotels and restaurants that are affordable
 - Ideal terrain for cyclists but dangerous I-5 crossing of the river is a problem. Most people just drive to French Prairie area and then start riding, bypassing Wilsonville and its businesses altogether
 - Location / easy access: 4 comments
 - Location close to Portland and Willamette Valley
 - Location on the Interstate 5 with good exits available. The opportunities this could facilitate.
 - Location on the Willamette River.
 - Natural environment
 - New facilities being developed for sports tournaments, skate park, pump track, swim center
 - Oregon Horse Country – horse shows/ hunter-jumper facilities / best horse trainers / horse sales 6
 - Parks – water features: 3 comments
 - Schools among best in the state
 - Shopping – Woodburn outlets, Fry’s, Camping World, Costco 4
 - Sports tournaments – soccer, baseball: 3 comments
 - Taking a historic perspective, the Boone family and Boones Ferry and also the Old Church and McMenamins efforts here.
 - Technical tours for international visitors e.g. technology, agriculture
 - The way the city sees the importance of commemorating the Korean War through the memorial
 - Visitation to Family Fun Center – a lot of people – good tourism attraction.

2. What do you consider to be the TWO greatest tourism WEAKNESSES of Wilsonville?

- Agri-tourism – wineries – farms
- Challenge faced is partly Wilsonville community members going to Portland for art and culture and not looking for culture locally and participating locally. Very much a bedroom community as a result. If city and community do not invest in themselves in these ways, the city will not thrive in such personal terms. Also, if cultural life boosted, visitor interest and options for things to do is boosted as well. By contrast Canby is getting a community center and this reflects the real pride in their town shown by locals.
- Chamber of Commerce was prevented from pro-actively marketing the city
- Chamber website does not have info for cyclers
- Grants program has been funding things of no tourism significance
- Horse shows are severely limited by land use laws and that can influence our attractiveness for organizers. There are other places they can go!
- Identity shaped by I-5

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- Increased hotel capacity could allow more sports tournaments 2
 - Lack of up-market lodging
 - Land-use regulations limit OHC event potential
 - Level of involvement by fresh faces and wider community in the arts and cultural development of Wilsonville needs expanding, but existing activists in this area need to make room for them and encourage their full participation too.
 - Limited river access: 3 comments
 - Need clearer direction from City as to what they expect from tourism / city could benefit from formalized DMO that has pro-active sales in winning events
 - Need more turf fields for sports tournaments / lack of sports fields 5
 - Nice, bland suburban community
 - No bike shop
 - No brand / no clear identity: 2 comments
 - No coordinated calendar of events
 - No downtown area, no central core to Wilsonville. No central hangout place that is attractive, energetic and people friendly – no place like other cities have that says ‘you are there’.
 - No major swimming center for events
 - No museums or significant cultural attractions
 - No real cultural development of significance – some investment in public art, but not at the level of investment where it needs to be to achieve real and lasting impact.
 - No town center: 5 comments
 - No Wilsonville-events.com
 - Not pedestrian friendly to explore city
 - Not really anything there to help keep people overnight – just a good stop for the basics
 - Only one choice exists for conventions – the Holiday Inn and booked out in summer.
 - Oregon Horse Country – not much there, there – what can a visitor do?: 2 comments
 - Our product isn’t ready yet
 - State of culture and the arts in Wilsonville is fairly dormant for a city of this size. Was being encouraged by a former City Community Services Director who recognized its value to her role, but not pursued much since and never made part of that Director’s formal job description, which it should be.
 - The city has relatively small budget for tourism and its marketing on its own, it needs to partner with bigger cities and organizations over tourism and at the airport.
 - The horrible reviews for some local hotels.
 - The Interstate 5 highway – because it divides the city both literally, physically, visually, and metaphorically. Has become a hard barrier to ignore or leap over.
 - Used to be (back in the ’80s) a big party/banquet/dance held in conjunction with and adjacent to the Horse Shows. A lot of visitors say this is very much missed now.
 - Wayfinding
 - When think of Wilsonville I don’t think of the River – which is a real shame
 - Willamette River Bike-Ped Emergency Bridge / dangerous river crossing for cyclists: 2 comments
 - Wilsonville and Woodburn sometimes get confused as so close. Wilsonville sometimes only seen as that place with the castle off the freeway.

3. What is really distinctive (or unique) about Wilsonville and helps it stand apart from other destinations in the Portland Metros area.

- Although horses events and horse shows are a special feature you would never know that. You don't see that anywhere, at least in terms of visibility from the freeway.
- It all looks so urban when driving along the freeway and observing the exits and more – you would never guess that they do major horse events and activities there.
- Location on I-5 and Hwy 205
- Lower cost to stay
- Midway between Salem and Portland
- Of all the Clackamas County towns, Wilsonville is the most difficult to create a sense of image and identity for. Where the 'there' is in Wilsonville. Something readily identifiable.
- So there is nothing Wilsonville is marketed for that makes it distinctive. There is nothing that helps make it stand apart – except maybe the Old Town history and connections to the history of Willamette Valley.
- Straddles two counties plus Metro and Willamette Valley
- The whole equestrian thing.
- There is no real urban or district cluster of noteworthy character to attract visitors (and even locals) – one offering multiple enjoyable experiences and choices.

4. Would you like to comment on how Wilsonville can improve its visitor and leisure attractions e.g. outdoor recreation, events, agricultural tourism, cultural activities, shopping, lodging for visitors?

- 12 x Concrete pads for public art were installed by City previously but investment in public art stopped and only a couple of sculptures still left in place now. The opportunity exists to have each pad along Wilsonville Road used – would make for an easy and good attraction. This should be built into the City's cultural tourism planning. Using appropriate themes and high impact works.
- Adopt a big picture point of view. City should approach tourism in a holistic and integrated way.
- Better utilizing the parks we have – e.g. acquire land next to Town Center Park and put in one or more really enjoyable additional activities there.
- Both visitors and locals way too unaware of what the horse shows offer, that they are free and open to attend – people's faces lit up at the Visitor Center when told they could go.
- City needs a clear and defined idea of what it wants tourism to be and they have to be able to take the responsibility to provide the necessary resources and people to make it happen. Chamber took this on and did that job previously but now the City itself needs to be more engaged. Previous reports on tourism to the city have not even been responded to suggesting the City never really cared or acknowledged what was and could be happening with tourism. If the city does manage tourism development and marketing then have to show via a city investment as well as thoughtful and focused strategy how serious they are.
- Create a tour app for Wilsonville and its visitors and prospective visitors
- Examine the feasibility of a multipurpose/multi-attraction 'community' center/civic facility with larger scale capacity for indoor events, conferences, performing arts, sports, aquatic facility, exhibiting artworks, etc.
- Expand experiences around Korean War Memorial – MacArthur statue and Museum. Right now is just a memorial. Good not only for tourism, but business development too and Korea is 3rd biggest trading partner for State of Oregon.

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- Extend the Christmas lights seen on Wilsonville’s street trees to year round use and build upon them to project Wilsonville as a ‘City of Lights’ – reinforcing also its Tree City/Tree Town status
 - Get more major corporations (including shopping) into Wilsonville.
 - Given difficulty in finding a city center and the divide the freeway creates, enhance the sense off the I-5 of an entry Gateway with large scaled and appropriately themed public art and more. Horse theme?
 - Intertwine cycling connectivity
 - Introduce better signage and signage marketing key events and attractions – e.g. Country Classic showgrounds signage with directions and advance cross street banner, etc.
 - Need more activities – work towards this goal over time.
 - People are starting to get an inkling that there is some good horse activity but don’t know where to go. Address this with seasonal sign on (or just off) freeway saying “Equestrian Shows Exit” and then also add supporting signage all the way to the venue.
 - River recreation – marina, kayaking, boat rentals: 2 comments
 - Should be an easy way to kayak and canoe/use the river
 - The various hotels off the freeway in Wilsonville will not make visitors stop and experience anything they can’t get elsewhere – what is needed in that regard is lodging with the qualities that high spending and frequent traveling visitors expect - boutique hotels with more distinctive, memorable and enticing lodging experiences and services.
 - Think beyond the city limits and look at how developing attractions outside of Wilsonville in its immediate surrounds (like horse country) can also help bring people into town
 - Tourism is not just tourism – it connects with the economy and education and more – they are all interwoven together. Tourism will grow by steps – more diverse and better restaurants, hotels, etc. American restaurants are everywhere. A high standard Korean Restaurant to complement the Memorial would give more visitors a reason to stop by.
 - Use location so close to Woodburn and Bridgeport shops and more to greater advantage by packaging the city more holistically – families can access stores during day, visit a winery, take kids to fun center at night, and also market the advantages seasonally – Base for Back to School shopping (for Southern Oregon and more), select pumpkins at Halloween, etc.
 - Use SMART services to take people to horse show events, etc.
 - While awaiting a bridge crossing, introduce a weekend boat ferry that can carry bikes, cyclists and pedestrians across the River at Boones Ferry Landing point and connect the Tonquin Trail bikeway all the way to this service.
 - Willamette River Bike-Ped Emergency Bridge
 - Wilsonville needs a broader outlook – that along that I-5 freeway and beyond there is big world out there that maybe it is not reaching. Bring home that it is more than a dormitory community.

5. If you could add anything to strengthen Wilsonville’s tourism MARKETING or how it PRESENTS ITSELF to outsiders, what would it be?

- A stronger sales function by future tourism organization is needed for groups and meetings
- Always gets down to developing a magnet attraction or enhancing an existing one in a way that could help create an identity for the city.
- Be sure to include lots of detailed information on the new website for cyclists
- Better availability of visitor information / better brochures needed: 2 comments
- Better coordinated marketing efforts / consistent messages

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- Better coordination with Washington and Clackamas County tourism organizations for sales and better targeting
 - Better job of branding the city / no brand identity: 2 comments
 - Better logos / no tagline
 - Capitalize on Horse Country
 - Chamber should be responsible for tourism marketing
 - Ensure that grants are directed to programs with tourism impact
 - Feels like a very new city, so if any heritage of genuine visitor interest, highlight it more?
 - Generate, package and access more things to do – Korean Memorial only takes 20 minutes – build experiences to point where they can at least fill a day’s activities.
 - Horse Country is not being marketed well
 - Increased marketing of City fields and facilities for events and tournaments
 - Issue being dealt with is when do you actually ‘arrive’ at Wilsonville, where is it? There is no sense of where to turn or go if looking for something distinctive in Wilsonville (even a town center).
 - Low awareness of what we’ve got here
 - Need to grow visitation September to May and weekends
 - New website that isn’t Chamber-centric
 - No indoor sports arenas
 - Past marketing good, but need more of it
 - Potential to attract tournaments focused on senior e.g. softball
 - Promote family-friendly – Family Fun Center, parks
 - Resources for the river and subsequent marketing of city as an access point for the river.
 - Set up well designed displays on what to do locally and in surrounds for visitors in hotel foyers.
 - The big boxes do their marketing well, but all that generic, commercial clutter leaves a visitor asking where exactly is Wilsonville and what is its identity. By contrast McMenamins does it more distinctly.
 - The Chamber was legally restricted from engaging in pro-active marketing by the terms of its Clackamas County tourism grant
 - The plan to establish information kiosks at French Prairie rest stop is seriously flawed due to safety issues and the fact that Wilsonville visitors will not stop there
 - The Wilsonville tourism grants are funding nothing of tourism significance
 - There is a need for more adequate signage – but does not have to be just totally conventional signs – public art and excellence in design skills can be used creatively to develop distinctive but still highly functional sets of wayfinding materials – many cities have done this very well and attractively.
 - Websites need improving and consolidating information
 - Wilsonville has not marketed itself well for tourism

6. Are there points or moments where the experiences of visitors to Wilsonville could be improved? What are those points? (Could be before, during, after visit)

- Better signage for sure. Too hard to find – complaints over the years about how hard it was to find the Memorial and the Visitor Center.
- Better website that is focused on the interests and needs of tourists
- Cannot effectively promote Wilsonville for cyclists until bridge crossing and Tonquin Trail are finished
- City Hall lobby needs to have visitor information more obvious and upfront/instantly found and accessed. And not have it put just to one side. Needs proper visible signage and staff trained to meet visitor information needs on tourism side of things and instantly ready to help.

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- Coming off I-5 its confusing and not welcoming
 - Encourage ODOT to clean debris off I-5 Willamette Bridge every two weeks
 - Ensure that State police are aware that cyclists can legally cross the I-5 Willamette Bridge
 - Frontline hospitality industry need better knowledge of what to do in Wilsonville
 - Need post event surveys to better assess customer satisfaction
 - Put hotel staff through more regular training to help make them more engaged and knowing – problem exists of definitely having a big turnover occurring. New people always evident,
 - Signage could be improved. Feature even more flowers in summertime.
 - There is not much on the freeway that indicates anything about tourism in Wilsonville, other than the Korean War Memorial. Need to do a better job of self-promotion.
 - Uninteresting view of city from I-5
 - Wayfinding and signage: 8 comments
 - Willamette River crossing for cyclists: 2 comments
 - Would help if it looked a little more walkable. If it was clear there was somewhere to go to find and see interesting things, like outdoor artworks, etc. Where are the cool parks, restaurants etc – rather than just the strip mall part and Fred Meyers which exist everywhere.

7. In TEN YEARS what are the most significant additions that you would like to see in Wilsonville in regard to recreation, leisure and tourism?

- ‘Heroic’ or ‘Architectural’ scale sculptures of distinction – but to be perceived must be part of their context and of a scale able to be readily seen when competing with everything else visually that surrounds or serves as backdrop to them.
- Additional high quality sports facilities, like a YMCA (there are 20,000 members in the Sherwood Y)
- At the very least, clearer and easier access to everything that a visitor can do and experience that is of interest. If Graham Oaks is promoted, ensure people get to know where it is and what can be done (real reasons to visit) – best trails information and maps etc.
- Better river access for recreation
- Complete the Ice Age Tonquin Trail
- Improved lodging including boutique and high end
- More turf multi-sport fields: 2 comments
- Some big time traffic calming in Wilsonville – on Wilsonville Road.
- Want to see Wilsonville ‘on the map’. See its logo added to local attractions like the World of Speed because this has now has the power to add its own supplementary recognition factor.
- Willamette River crossing for cyclists: 2 comments

8. In TEN YEARS when speaking to people outside of Wilsonville, what is it that you would like to say with greatest pride about the city as a place to visit?

- Great recreation for the family with trails, river, swimming center, amusements
- Like to see Wilsonville – outside of the equestrian world itself – become the undisputed and exciting choice for equestrian experiences in Oregon at least.
- Like to see Wilsonville – when a weekend getaway is being planned by a family – be the place to stop and stay. Affordable hotels and things for kids to do.
- Love to see Wilsonville be a place where visitors from the Central and Northern Willamette Valley will travel to stay in lovely and unique boutique hotels. From which horse tours and events can be

arranged and the real Wilsonville observed as possessing a surprising sense of beauty and elegance once you get off the I-5 and experience it.

- Nice place to raise kids and retire
- One of Oregon's best cycling cities
- You can have fun here

9. The following statement represents the current tourism vision for Wilsonville. In what ways do you consider this statement should be changed or updated to make it Wilsonville's 2024 tourism vision?

Vision:

In 2015, Wilsonville with a family-oriented and culturally attractive town center and Boone's Landing Heritage Area, is the premier corporate, group meeting and leisure recreation venue in the Willamette Valley between Portland and Salem.

- Don't need Boone's Landing
- No mention of OHC, sports or cycling
- Okay in general, but City should add one more perspective – that the City is ready to become sort of leader in terms of its culture and the way it approaches tourism in general
- While there is a lot of enthusiasm and pressure from City and Chamber (as part of this vision) to bring in as many corporate events as possible, Wilsonville does not have as much corporate space as is needed, particularly for multi-day conventions and meetings. Too often when booking inquiries made, hotels were full with no space for them. City seen as the right place to stay being right between places going to, but unavailable. Newly renovated Holiday Inn impossible to book in summer.

10. Is there an existing event, attribute or attraction in Wilsonville that you would like to see further developed to attract more visitors to the city?

- Because the city is halfway between Salem and Portland, would be good to see better links to wine country and hazelnut/farm orchards, convey that it is a good launching point for seeing the countryside and for taking the interesting Canby ferry trip across the Willamette.
- Better to spend time thinking about how to develop a 'magnet' attraction. Get away from festival and event outlook and develop some unique feature of the place – but done genuinely, dynamically and consistently – without relying on tired and clichéd ideas. Visitors understand differences between what is authentic and inauthentic. Spend time on identifying exactly what Wilsonville is and what activities/initiatives can be derived from what the place essentially is.
- Create a program that sees sculptures/public art placed along the bike paths and trails
- Enhance the success of the horse events (Country Classic Horse Show 6 week period) by re-creating a signature lead in or welcoming event for the period that this time possibly brings together other Wilsonville elements including water (the river and fountains, water park, etc.), wines and farm fresh foods, public art (horse and water themed, music, art, photography, family fun and participation, etc. 'Eqwine Festival'??
- Equine events
- Fun in the Park is very, very local but a big success particularly for the kids the event is focused around – but it is not a destination event.

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- Given its convenient location, make the city a convention friendly center. Need more high quality and larger capacity facilities. Only lesser meetings possible with most places at present, not that this market is unimportant either.
 - Have the existing bike trails around Wilsonville individually named for better recall and identification and better signed. Also signage with information included on how long to undertake in distance and time, what you see on the way, directional arrows, etc.
 - In relation to the new World of Speed attraction, the biggest thing to help is the effective promotion by the City of tourism including wine tourism to get people in action to see other attractions like the museum and others in the area. Need families to come and bring their kids – a reputation as a family destination with places for children to go.
 - Intertwine cycling connectivity
 - Loath to recommend investing in any more festivals or events, as that approach does not work anymore unless absolutely exceptional approach used. Instead why not ask what can Wilsonville do that no one else is doing? Hard to find any city on any weekend that does not have some sort of event trying to attract people. They tend to be all alike with very little vocalization of what they are let alone what is really different about them.
 - More accommodation
 - Redesign of Memorial Park to make better use of the space and river access
 - Revive the fast boat trips up the Willamette River to Oregon City and the falls
 - Run a car show in cooperation with World of Speed?
 - The Korean War Memorial – expand this by adding a museum and statue (of General MacArthur). Could then invite people from the East Coast and Korea itself by making it more important. Invite the UN Secretary General (Korean). Large numbers of Korean Americans already in the US and nearby.
 - Willamette River Bike-Ped Emergency Bridge

11. In your opinion, are there attitudes, systems, regulations, laws, or particular challenges that are limiting Wilsonville’s tourism performance?

- Are all hotels accurately reporting and paying their TLT accurately?
- Attitude of City has been focused on economic development and has not appreciated how the place can benefit as a tourism destination and outstanding recreation facilities
- Chamber has been very helpful in the past, but the City of Wilsonville itself should be the main agency to deal with and develop tourism
- City needs to be more open-minded in regard to commercial and event signage
- Hunter Creek Farm (horse show venue) used to have vendors, wine tastings, food, the banquet and dance, interesting merchandise stalls as well as the opportunity to watch the horses jump. Helped make the event even more enticing and popular to non-horse people. Gone now.
- Insufficient knowledge on that to answer.
- Need clearer direction from City as to what they expect from tourism
- Need more hotel and meeting room capacity to satisfy demand and potential for growth here.
- No, none that I’m aware of. Very good in my experience.
- Not sure if city and community are well educated and informed on international travel and the opportunities other countries may provide or open up. To help here, a trip to Asian countries could occur to learn more about tourism and economic development opportunities
- Nothing to say at present, but could know more when propose the Statue of the General for the Korean War Memorial at Town Center Park.

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- River accessibility is holding back development
 - Signage for directional, commercial and events
 - Some active equestrian people would like to get OHC away from the Chamber of Commerce
 - Sometime left dealing with too many authorities (Counties, City, etc) over a new tourism development. (Or when trying to enhance an existing one.) Be better to deal with one responsible agency at the city level -they could do the consulting with the others to assist here.
 - State Planning / Restrictive land-use laws are hindering activities on farmlands, OHC and wineries: 4 comments
 - The City of Wilsonville should be using a higher percentage of TLT for pure tourism
 - The limit places on vendors caused the change for the worst. Signage and lack of it is also terrible and needs to be fixed. Visitors and locals need to know how to get from A to B to attend event and what the experiences are that are being offered to them.
 - The tourism side and reputation to the city has become contentious – should not become known as a difficult to work with city which will always hinder good things happening. But current Mayor does seem supportive and straightforward in outlook. Some dedicated staff too. Will be productive if the city is breaking out of the way things have always been done.

11. Would you like to make some additional comments?

- If the City operates the tourism office in future, too much of the budget will be consumed by benefits like PERS
- Oregon Horse Country is confusing. What is it? It's not really a tourist attraction except for events. They're closed aren't they?
- Are we sure that all hotels are paying their fair share of the lodging tax?

2. Stakeholder Workshops

The following is a summary of comments and input received during workshops conducted on 16 and 23 of October 2013 for the general public and interested parties, and a Task Force Workshop on 24 October 2013, all held at Wilsonville City Hall. The 36 workshop participants included:

Wilsonville Tourism Workshop Participants - 16 October 2013

Name	Affiliation
Danny Abrego	Portland Reign Photography
Keith Amundson	Wilsonville Arts & Culture Alliance
Jeff Brown	Holiday Inn South Portland/Wilsonville
Dave DeHart	Wilsonville Arts & Culture Alliance
Jerry Greenfield	Wilsonville Arts & Culture Council
Darren Harmon	Family Fun Center
John Lim	Korean War Memorial Foundation of Oregon
Susan Myers	Capital Realty Corp.
Kristina Shipley	Holiday Inn South Portland/Wilsonville
Suzy Sivyer	Friends of Library
Simon Springall	Wilsonville - French Prairie Bridge Campaign
Tonie Tollen	Tollen Farm
Steve VanWechel	Old Town Neighborhood/Bicycle Bridge
Doris Wehler	Wilsonville Chamber of Commerce
Vern Wise	Lambs Thriftway

Wilsonville Tourism Workshop Participants - 23 October 2013

Name	Affiliation
Denny Atkin	Resident
Jerri Bohard	Resident
Eric Bohard	Wilsonville Parks & Recreation Advisory Board
Danielle Cowan	Clackamas County Tourism & Cultural Affairs
Brandi Ebner	Wilsonville Chamber/Oregon Horse Country
Jerry Greenfield	Arts & Culture Council/OR Passenger Rail CAG
Greg Leo	The Leo Company
Al Levit	Resident / Wilsonville Planning Commission
Kathleen Mason	Aurora Colony Museum/Visitor Association
Carolyn McCormick	Washington County Visitors Association
Susan Meyer	Capital Realty Corp.
Jin Park	Korean War Memorial Foundation of Oregon
Eric Postma	Wilsonville Chamber of Commerce
Pat Rehberg	Wilsonville Wheelers

Name	Affiliation
Suzy Sivyer	Wilsonville Friends of Library
Dick Spence	Wilsonville Library Foundation
David Stead	Langdon Farms Golf Course
Mary Stewart	Resident / MARStewart Creative Group
Annie von Domitz	Oregon Travel Experience

1a. What do you consider to be the greatest tourism STRENGTHS of Wilsonville from a visitor’s perspective?

- ‘Top Ten’ attraction Family Fun Center and Bullwinkles
- Accessible to Coast, Mountains and River, also Horse Country and Wine Country
- At edge of urban growth boundary, so rural opportunities as well as urban – guaranteed rural access because of this boundary
- Award winning Parks
- City is favorable to Business Traveler – services needed are here
- City small enough to walk – friendly, non-threatening, open environment, lots of parks, clean streets/clean city, attractive
- Cycling/Bike tourism growth potential – at southern end of Ice Age/Tonquin Trail – Cross river bridge opportunity at Boones Ferry Landing to connect to Eugene and PDX via trails. French Prairie proximity. But Canby Ferry exists and one of the few experiences of its kind in OR.
- Diversity of things here
- Equestrian -Horse Shows and wider presence (stables, classes/clinics, breeding, etc)
- Excellent schools
- Favorable shopping location. Accessible to Woodburn Company Stores and Metro area major shopping centers.
- Gateway to Wine Country and Willamette Valley – surrounding agricultural areas
- Good cultural events – Wilsonville Festival of Arts, Fun in the Park, fairs – summer music/concerts in the parks
- Great businesses/Shopping – Family Fun, Camping World, Fry’s
- Historic – Champoeg State Park, Oregon Trail, Boones Ferry, etc.
- Horse shows have enormous impact and their own ‘circuit’ time slots to be staged on – resulting in 6 week visitor stays and 3 months rental – Each horse accompanied by at least 5 to 6 people
- Korean War Memorial
- Location near Portland. Interstate 5 and 205 access.
- Location on a major river (Willamette River) – not tapped much, but big opportunity
- Lodging - less expensive stay for visitors to Portland
- Major corporations located here – attract people
- Midway between Portland and Salem.
- Oregon Institute of Technology – new and growing – student market and parents
- Public sculptures/Public Art
- Quality of city planning – done well – 92% of public favorable
- Restaurants – growing in numbers and quality
- SMART transportation system – within and to other communities - Portland and Salem too

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- Sporting events around region – hosting soccer in the parks, basketball, etc – Memorial Park in summer, School facilities
 - Water features in parks – summertime appeal to families and kids/grandkids – host family reunions – a family town – attract families/family vacationers here?
 - Wilsonville bottleneck – potential advantage for cycling?

1b Which strength has the greatest potential to attract visitors?

- Equestrian
- Access to Willamette River opportunity
- Potential of location and its accessibility
- Lodging and services, businesses
- Gateway to Valley
- Oregon Institute of Technology – a draw from around State
- Diversity of opportunities

1c Are there experiences and activities that may be small today but may be major strengths in 5-10 years?

- Agri-tourism – local fresh grown food, farms, wine/wineries, progress with culinary offers and quality
- Aquatic Center and Community Center – major regional swimming center
- Biking/Cycling and recreation – end of Tonquin Trail – new connections linking PDX to Eugene
- Canby and Aurora visitors – no lodging – Wilsonville closest options
- Experiences for Boomers and their disposable income – activities, kayaking, history interest etc
- Festival/Event opportunities – draw visitors
- French Prairie – 140th Anniversary
- Improved/New horse facilities. Build Equestrian Center
- Mass transportation into Wilsonville and less reliance on car
- More sports facilities
- New Cultural/Performing Arts Center with water access
- Oregon Institute of Technology – looking at 4,000 students
- Recreation experiences on/along the Willamette River – some like skiing, year round
- River and access – capitalize locally on County focus on river tourism over coming years
- Same for St Paul 4th July Rodeo (10,000 attend)
- Shopping hub – Asian tourists (fly in to Woodburn Motor Homes), Canadians (Outlets, Malls), and draw from South too, WA, etc. Woodburn Outlets, Malls, Fry's, etc.
- Sporting events – September to May – regional sports draw for youth (more affordable lodging)
- War Memorial site – a draw, but provide more reasons to go
- Weddings and venues? (Already McMenamins, Golf Course, Historic Barn & Parks, Vineyards too)

2. When you consider Wilsonville's major attractors, which ones have the strongest drawing power and greatest potential economic impact for the city?

- Aurora Airport – corporate business
- Bike riding/bike tourism potential – not necessarily reliant on new Bridge crossing – already at end of Tonquin Trail and a base for Valley rides
- Great base for business travelers (draw of corporate operations here) – meetings and conferences
- Hotels/lodging advantage – proximity to PDX and their competitive rates

-
- Korean War Memorial museum (potential/unrealized as yet) – Korean and Korean American visitors)
 - New ‘World of Speed’ museum
 - Oregon Horse Shows/‘Oregon Horse Country’ – great identity campaign – targeted marketing campaign and tours opportunities
 - Shopping and dining
 - Sporting events

3a What do you consider to be the greatest WEAKNESSES of Wilsonville from a visitor’s perspective?

- ‘Horse Country’? – Shows, barns, clinics and training but no tours and no trail riding opportunities
- Absentee business owners – Fry’s, hotels
- Available transport and transit viewed as insufficient in hotel visitor comments
- Champoeg camping and RV is maxed out. Not sufficient RV facilities in Wilsonville.
- Cyclists – not good cash register/\$ market? Self-sufficient? FIT?
- Diffused, non-focused tourism strategy – shotgun marketing promotion – need more focus
- Fragmented/dispersed identity as a city
- Horse properties for shows – only 3 months of year operation because of weather
- Horse shows – attracting 200 Hunter/Jumper world horses per week but Bend running bigger show events attracting 800 horses/week
- If drive off highway, nothing really here – no wow factor – don’t see much – won’t stay for the restaurants – no shopping centers
- Lack of bike/ped bridge over the Willamette – so river is barrier to cycling – i5 bridge crossing for cyclists potentially dangerous and littered in their side lanes
- Lack of more interesting ‘destination restaurants’
- Lack of outfitters, bike shops, kayak hire, etc – was a bike shop once (not enough custom yet?)
- Lack of ready access to Willamette River. No close accessible boat ramp on river
- Lack of some key services – e.g. no Laundromat for RVs
- Location – a place passed through on the i5 and largely viewed and judged from it.
- Many different cycling market types – need to put together activities and events for cyclists
- Need shuttle services for cycling?
- No boutique hotels or lodging options
- No districts or precincts known for something – e.g. food, arts/entertainment, heritage etc
- No image – lack of definition (but Horses helped here)
- No real ‘sense of place’ yet and no obvious city center – city is divided into 2 or 3 parts by the highway and the river. Multiple town ‘centers’ (connect them?)
- No walking path along river
- Not a lot telling people what Wilsonville is about, what is there
- Not enough to do around here - great place to live but not keep here for long as a visitor
- Not promoting heritage/history of area – natural/trail end etc
- Opportunity to lift quality and attractiveness of nearby Canby County Events Center/Rodeo facility and bring it into play – no lodging locally so Wilsonville nearest
- Packaging needs – pull it all together – Wilsonville and surrounds
- Trees and Lighting (etc) okay but no big impact yet
- Underutilized sports fields (high quality) – but lacking all weather fields – need for better marketing of the camps – volunteer organizations running most of it, not city as occurs elsewhere

-
- Wayfinding/Signage weaknesses
 - Yet to finish the Tonquin Trail with a connection/Link for cyclists

3 (B). Which is the most important to be addressed?

- An understanding of which regional sports programs would be best to spend on to get a return
- Budgets to do it all
- Build and invest in basic infrastructure needs first – the bridge, a covered arena for horses, launch points for the river
- City needs an identity – people don't know about the city
- Marketing strategy need – but also execution of it – who will pull it all together?
- Need a plan with priorities
- Need a strategic vision – and from marketing perspective too
- Need businesses from the list.

4. Do people outside of Wilsonville have an accurate image of the city?

- Haven't really defined ourselves – there is a proactive messaging need
- No
- Not currently cross selling/cross promoting the 'place' between venues and outlets (e.g. Fry's, etc)
- Once people know of us, are amazed
- The Willamette River is not identified with Wilsonville
- There is positive feedback about the city from sporting event visitors and participants
- Think of traffic jams on the i5 (with Wilsonville mentioned as location)
- Think of what you can see from the i5
- Work and leave image

5. What is really distinctive (or unique) about Wilsonville and helps it stand apart from other destinations in the Portland Metro area and Willamette Valley?

- Aurora Airport and aviation industry– business travel – stay at Holiday Inn
- Can enjoy agricultural experiences close to PDX
- Canby cross river car ferry
- City is newer and cleaner – has its utility lines buried - can tell it's more planned
- City is solvent and finances managed well
- Fabulous location – gateway to both Metro area and northern Willamette Valley
- Fry's
- Horse drawn collections – examples from throughout the last 200 years of horse carriages
- Horse/Equestrian events known as 'The Wilsonville Shows'.
- Intangible qualities – move in and settle easily – good place to be
- Korean War Memorial and culture – but needs to extend into dining, dance, etc? Add large statue of General Macarthur
- Links golf course
- Local government receptive to tourism – and tourism the portal to economic development and business locating
- On the edge of urban growth boundary
- One of the largest soccer events in the US held here – will this make me the most money?

-
- Sub-exhibits from the Power Museum
 - The Wilsonville fountains (families)
 - Where Boones Ferry was
 - World of Speed museum when open next Summer

6. If you could add anything to strengthen Wilsonville’s tourism marketing or how it presents itself to outsiders, what would it be?

- Also work with Travel Salem? Salem Travel and Wine Center
- Although some Wilsonville content in two County tourism websites, important to have a dedicated website for Wilsonville itself
- Antique car shows – auto theme events to connect to new World of Speed museum and other auto businesses
- Branding and signing - Establishing identify for Wilsonville and what it is – also digital highway branding
- Building an image and delivery that drives the desirability to visit
- But presence on other websites also needed (links to) and not just your own
- Embrace bordering Marion County attractions as part of Wilsonville marketing?
- Greater variety of things to do that are exciting and fun
- Identifying best things to do within 15 miles (The Daisy Map?)
- Importance of residents to vital cross selling while visitors are here
- Like to see an international fair, given how many ethnicities are here
- More partnering – e.g. with Portland Historical Society and more
- More use of social/digital media people working in both Counties’ websites
- Reaching out and selling – exposing the city. More active cross-promotion and cross-selling
- Strong web presence – robust website and mobile media – electronic presence is missing now – we should have this. Better and more compelling web information and advice – e.g. if biking Willamette, can stay in Wilsonville

7. Are there points or moments where the experiences of visitors to Wilsonville could be improved? What are those points? (Could be before, during, after visit)

- Become a food cart central off the i5?
- Get lost easily – confusing for first time visitor – e.g. finding way to Bulwinkles
- Having a script to give to the ‘frontline’ staff of Wilsonville and its businesses (Explaining what you can do) – common talking points
- If searching on web by other interests – is Wilsonville found?
- International and interstate tourism (e.g. Koreans/Canadians, Seattle, etc) – package for them. For example with Koreans coming for golf – booking – link to visit to War Memorial
- Need more prestige/high reputation/distinctive e restaurants
- Some hotels a bit tired – need updating/refurbishing a little
- Wayfinding. Signage upon arrival not very good – make it more exciting, more helpful

8. In TEN YEARS what are the most significant additions that you would like to see in Wilsonville in regard to recreation, leisure and tourism?

- Have canoe/kayak rentals off Wilsonville’s Memorial Park river front access
- New bridge at Boones Ferry in place with high design qualities and ‘iconic’ status

-
- Put in and take out places – with no car pickup requirement – shuttles?
 - Willamette River trail opportunities capitalized upon with signage, camping sites, exit and stop points along the Wilsonville stretch of the river. Eugene to PDX by kayak. The Wilsonville section to river is very gentle.
 - Wilsonville has become a waterfront tourist destination – with adjacent services (overlooking nature and the river) like cafes/restaurants, with boardwalks, etc

9. In TEN YEARS when speaking to people outside of Wilsonville, what is it that you would like to say with greatest pride about the city as a place to visit?

- A city that has honored the Korean War vets
- Fun place to visit. Because? All of the great answers able to be given.
- Has built an identity
- Place families will visit and enjoy
- The ‘surprise city’ Surprising small city
- Want to more commonly hear people saying “You should go yourself”

10. Tourism Vision:

In 2015, Wilsonville with a family-oriented and culturally attractive town center and Boone’s Landing Heritage Area, is the premier corporate, group meeting and leisure recreation venue in the Willamette Valley between Portland and Salem.

In preparing the revised vision are there important changes, trends or aspirations we should consider?

- Delete “Boone’s landing heritage area”
- Retain “premier corporate group meeting” component – as still relevant and true

Other comments/suggestions:

- ‘Between Wilsonville and Salem’
- Add/include “Horse Country” – meaningful given horse events, breeding farms, horse training, riding lessons, big horse ownership, existing reputation on circuit – known by Wilsonville name
- Add/include “sports” (in terms of revenue generation – ‘recession proof’ in experience of hoteliers). State class facilities development.
- Add/include Bicycle Bridge over the Willamette. Start of four journeys.
- BLHA does not exist
- Culture of local government wanting to have tourism
- Family is correct, but ‘family friendly’ not ‘oriented’ more accurate?
- Ideal hub to do things
- Identity part is missing – find this first
- Narrow the focus to 2 or 3 niches
- Partner city and businesses to move forward – ‘premier corporate’ should remain
- Regarding conference and meeting aspect, no large venue here with capability to meet need here as yet
- Rewrite into something that is obtainable
- Should include the word ‘destination’
- Vision statement feels unfocused – using a shotgun approach.
- We’re a gateway – but hub need to be in there somewhere, to be more than a gateway?

-
- What have we done to market to the business traveler?
 - Where is the “culturally attractive town center”?

11. In your opinion, are there attitudes, systems, regulations, laws or particular challenges that are limiting Wilsonville’s tourism performance?

- Better partnerships – city and businesses
- Challenge? Get businesses to be more creative
- Existing I5 freeway barrier to cycling – scary crossing (but is legal)
- Laws and rules on river too (Greenway rules) – access implications
- Limits on horse/equestrian events – private property in use – vendor limitations. Circumstances limit what can be done and how much more appealing the event can be made
- Lot of business owners and employees don’t actually live here – affects their outlook and sense of ownership – different if actually lived here
- Resistance to change and tourism? Old Town? Boones Ferry Landing area?

12. In your opinion, are there any issues that may stand in the way of successful implementation of a tourism strategy for Wilsonville?

- Changes in political will and in budgets (potential to occur every 4 years)
- If localized market research required pool funds with other partners – Counties, businesses, etc.
- If resistance to change arises, involve people in non-threatening ways
- Need for funding
- Neighborhood acceptance
- Traffic issues – city is not planned for lots of extra cars as population grows

3. Online Community Survey

The following are the verbatim responses that were received from the Wilsonville Community Online Survey. This survey was available to local residents from October 9 to December 4. A total of 35 residents responded to at least one question in the survey. **Note:** These are verbatim responses, hence are exact transcripts of the responses and contain spelling, typographical and grammatical errors. **Highlighted cells** indicate the greatest number of responses to a given question.

WILSONVILLE STRENGTHS

1. Please indicate to what extent you agree or disagree with the following statements.

	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	Unsure / No Comment/
A. Wilsonville always presents itself in an attractive and welcoming manner.	25.8% (7)	64.2% (20)	6.5% (2)	3.2% (1)	3.2% (1)	0% (1)
B. I am confident in recommending Wilsonville as a great place to live.	61.3% (19)	35.5% (11)	3.2% (1)	0%	0%	0%
C. I am confident in recommending Wilsonville as a great place to spend a few hours.	46.9% (15)	37.5% (12)	15.6% (5)	3.1% (1)	0%	0%
D. I am confident in recommending Wilsonville as a great place to visit for a few days.	18.8% (6)	34.4% (11)	21.9% (7)	25.0% (8)	0%	0%
E. I am confident in recommending Wilsonville as a great place to shop.	3.2% (1)	32.3% (10)	48.4% (15)	16.1% (5)	0%	0%
F. I am confident in recommending Wilsonville as a great place for meetings and conventions.	18.8% (6)	46.9% (15)	12.5% (4)	9.4% (3)	9.4% (3)	3.1 (1)
G. I am confident in recommending Wilsonville as a great place to retire.	41.9% (13)	41.9% (13)	16.1% (5)	0.0% (0)	0.0% (0)	0.0% (0)

2. What do you consider to be the TWO greatest tourism STRENGTHS of Wilsonville?

- 1) Fun Center (sad to say) 2) Horse Country
- 1) Location (near a major city but not that city), 2) Development has been nicely controlled over the recent years
- Accessibility, proximity to other areas and attractions
- Art and family events in the park
- beautiful community, but what would a family or couple do if they came to stay for a few days in Wilsonville? Not sure there is a draw for this
- Clean and safe.
- Cleanliness and compact design
- Easy access to I-5 & I-205
- Family Fun Center Horse events
- Horse Country Not sure another strength.
- horses, technology
- Hub for bicycling and Oregon history.
- I don't think there are any strengths - which could be good to start something new.
- location easy access to surrounding areas
- Location Freeway access
- Location and out-of-town opportunities.
- Location for family fun.
- location, convenience
- Location: Easy to get to, the gateway to the Willamette Valley Diversity of fun: Many great things to do in and around Wilsonville
- Nothing truly unique comes to mind. Great alternative off site meeting place for businesses/Govt. agencies - competitive hotel rates, plenty of free parking, good diversity of restaurants, safe, etc.
- Parks with water features during the summer. Undecided between the new museum or horse shows.
- proximity to historic and cultural centers, besides Wilsonville: Aurora, Salem, Champoeg, Portland
- SMART bus system for getting around. Excellent parks.
- Summer events: Kids Fun Run, Rotary Concerts, etc. Great park system.
- Well planned community. Good jumping off place for nearby attractions
- Wilsonville Family Fun Center Equine events
- Wilsonville Festival of Arts project Other summer events

3. What do you consider to be the TWO greatest tourism WEAKNESSES of Wilsonville?

- 1) Lack of investment by the City in arts and culture. Cases in point: the cities of Tualatin, Lake Oswego and Hillsboro have invested hundreds of thousands of \$\$ in arts and culture which, in turn, has leverage matching grants through nonprofit organizations and individual contributions. This has financed arts and culture projects in the communities, enhancing quality of life while creating destinations for tourism. 2) Lack of the City's desire to form public-private partnerships. Cases in point: To my knowledge, there was no business plan when the City spent \$500,000 on renovation of the Boozier Barn. Upon completion, it was padlocked within months because of lack of use. With proper planning, it could have been turned into a tourist destination. Also, the Willamette Water River Trail was another opportunity. A committee was put together by volunteers to strategize for a planning grant. After several meetings, the mayor turned over the project to a staff member. The project failed, but in Salem and Eugene the partnerships

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- of city staffs and volunteers have resulted in millions!
- 1) no location for conventions (except small ones at Holiday Inn, and its almost OUT of Wilsonville), 2) and nothing really promoting tourism/reason for them to come here (outside of shopping at Fred Myers and there are a few other FM's they can go to if they want).
 - 1) Small thinking and not seeing "the big picture" at time of city officials, and 2) nothing really that encourages "tourism" -- convention center, anything that really encourages tourism such as special features/attractions/reason to come to and spend money in Wilsonville
 - Access to the river is lacking.
 - Divided by the I-5; ill-defined town center; no easy access tourism site from fwy.
 - freeway cutting the city in two, too much traffic with long traffic lights
 - inaccessibility across the river by foot and bicycle, lack of indoor events venues
 - Lack of a unique attraction.
 - Lack of destination attractions, such as museum, historic sites, live theatre facility.
 - Lack of lodging and the Boone bridge limiting access the Butteville Rd.
 - Lack of meeting facilities
 - Lack of Tourism Strategy ill defined identity of place
 - Location and no downtown pedestrian feel.
 - No major attraction
 - no one likes to come here because the police are so aggressive
 - No performing arts center No art galleries
 - No Performing Arts Center. No Community Focal point No old town with shops Failure to feature the Willamette River as destination.
 - no performing arts wellness facility
 - No skateboarding park and no city pool/community center
 - No specific/unique tourism niche exists . . . I have a very unique concept idea that will draw International tourism and utilizes the existing infrastructure (hotels/restaurants). No central convention/activities building exists.
 - Not a lot to do. No brand awareness.
 - Not enough activities to keep tourist within Wilsonville for more than an hour or so. Weeds in flower beds this past summer.
 - Not enough meeting space for 25-60 people. Only good meeting space with food is Holiday Inn, and they are often full.
 - Nothing to do on Willamette River No really upscale hotel
 - There are no big events to look forward to each year. There are no big events that draw in people from other places.
 - things to do outside of Family Fun Center and visiting horse facilities...what is the draw?
 - Wilsonville is located in a great place for bicycle tourism, however the missing link over the Willamette river is a big problem. Also, there should be more activities available on the river, which is great for kayaking and canoeing.

4. When friends or family visit you, where do you like to take them?

- 1) to see The Beauty and the Bridge Project and 2) the wood graphic design thing inside the front door of the library
- 1) Wilsonville Public Library to see the art collection. The Intarsia viewed from the entrance and porcelain sculpture outside the children's room are one-of-a-kind and hidden jewels in Wilsonville. 2) Old Town . . .

the historic gateway to the Willamette Valley.

- Abella Kitchen, Dar Es Salaam, Canby ferry,
- Beauty & the Bridge, SMART a time or two a year TOUR OF WILSONVILLE
- Bullwinkles movies bowling even these are not really classified as tourist items
- Champoeg Park, restaurants
- Dar Essalum restaurant located behind Fry's.
- Depending on who it is and where they're from -- the usual places, such as Multnomah Falls.
- Farm & Vineyard ToursTours - Animals to see, fruit and food to eat, wine to drink Great Places to shop-Fry's & Factory Stores
- Fry's Bullwinkles Holiday Inn House of Terriyaki II
- Graham Oaks (*outside* of Wilsonville) Fry's Town Center Park & Murase Park
- Granddaughters to water features in parks.
- I don't live here and wouldn't necessarily bring my friends or family here.
- I would go to other activities outside of Wilsonville, such as Hood River, Multnomah Falls, Saturday market etc...
- Local restaurant
- Meals, park visits and walks, whatever summer events are happening - and Portland for tourist attractions.
- Memorial or Town Center Park if weather is nice.
- Memorial Park, or perhaps wine tasting.
- Other than The Old Church, we go downtown, the coast, or the wine country.
- Out to Wilsonville restaurants, Frys, or Wilsonville Theater.
- Parks, restaurants
- Sculptures, Parks & Restaurants
- The public library
- to the public library McMenamins history presentations
- Tour of sculptures. Korean memorial
- Usually walking on paths and neighborhoods in town. Graham Oaks is especially good.

WILSONVILLE ATTRACTORS

5. Can you please comment on how Wilsonville may be able to improve its visitor and leisure experiences in regard to the following? Note: It is NOT necessary to respond to all questions

5a. Heritage

- A historic center
- A museum.
- Better signage for historical locations but most of the current places are just remembrances of what was there rather than currently visible.
- Capitalize on the location - a few miles down river from where "Oregon began", a few miles up river from the End of the Oregon Trail, area of the great Missoula Flood, the Calipoia Indians, the grandson of Danil Boone of Kentuck's grandson starting Wisonville, "THE" place where the railroad chose to cross the Wilametter River- as well as the State in putting I-5 Boone Bridge there as well, ferry history itself, etc.
- develop heritage park at Boone's Landing

-
- Emphasize old town aspects and the fact that Wilsonville was a major crossing place
 - Focus on Boones Ferry
 - Have volunteer tourism guides available. WV has a wealth of interesting heritage features & stories, and a wonderful Genealogy service at Library. Also need group transportation available.
 - Market Champoeg and Aurora Better as day destinations
 - More 'historical' aspects, such as an exhibit or museum.
 - Open a museum or start a heritage specific event specifically in Wilsonville.
 - Play up the Daniel Boone connection. Is it possible to establish an educational kiosk at or close to the original ferry crossing?
 - Provide easy access visitor center with LIVE concierge to help direct visitors to historic sites with maps, and local businesses such as lodging, restaurants, dining, shopping, etc.
 - Restore Boone's Ferry. The main reason the city was located where it is. If not an actual ferry, the proposed French Prairie Bridge would be located in the same historic location.
 - There is an abundance of historical strings that could be picked up - the native Indians, End of the Oregon Trail, the Start of Oregon, the start of Wilsonville by Daniel Boone's grandson, the Missoula Floods, history of shipping up the Willamette River, the coming of I-5 and how it got placed where it is, the nationality groups locally, the presentation recently about the graveyards in the area by former mayor Leehan was fascinating, etc. Wilsonville really needs to find a way to capitalize on all this. There's the Heritage Tree Program.
 - Visitors center and library need to display more about heritage info.
 - Wilsonville has a proud heritage. Heritage markers dot the landscape but receive limited promotion.

5b. Lodging / Restaurants/Dining / Shopping?

- 1) Options will need to be greatly expanded if we put an emphasis on conventions, etc. 2) Need to develop a means of promoting all these to folks in local hotel rooms 3) I love the idea of a shuttle service between area hotels and local locations.
- already strong including location as a hub for shopping in nearby communities (for example, Woodburn, Aurora, Bridgeport, Tualatin, Wine Country)
- As for lodging, Wilsonville is ideally located to access tourist sites in all directions. We now have an amazing selection of dining options. The fact that we're located just outside the traffic jams of Portland yet close enough to access metro area sites and events is a plus.
- Develop local mobile app which will 'push' coupons and special event information to your smartphone
- Encourage the development of more of a convention/meeting location - away from the big city, but right next door with all the amenities (maybe this can be in some way connected to the upcoming aquatic center????????? Lets be creative!
- Improve on lodging options - virtually all are old and most are cheap/decrepit
- Mostly fine - perhaps a guide?
- Need a better variety of restaurants.
- Need a destination hotel along the lines of Mcmenamins Edgefield or Grand Hall.
- Need an "in town" convention center for large groups/annual meetings, that would include overnight accommodations. (Move Holiday Inn to Town Center Loop - LOL)
- Need an upscale food market - Trader Joes or Whole Foods Need an updated theater Need restaurant meeting space for 30-100 people (in addition to Holiday Inn)
- Need restaurants with separate room for banquets of 25-70 people. Need high-end motel.
- Need to improve the Old Town neighborhood more as an attractive place to shop & eat.
- No improvement required

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- Open more cutesy shopping places for home and gifts.
 - Provide easy access visitor center with LIVE concierge to help direct visitors to historic sites with maps, and local businesses such as lodging, restaurants, dining, shopping, etc.
 - Sprucing up lodging establishments would help. Availability of B&Bs would also be classy. Most restaurants are chains or mediocre. Need more upscale/destination places like Dar Esallam. Aside from Fry's, local shopping is pretty much for local need.
 - Try to attract a top quality restaurant such as a Toro Bravo branch. Tapas would be a great addition - the space at the corner of Wilsonville Rd and Town Center Loop would be great
 - We don't have bad restaurants, but shopping is pitiful
 - With limited lodging, restaurants and certainly shopping, perhaps proximity to Bridgeport and Woodburn Co. Stores are amenities that might appeal to travelers and meeting-goers.
 - Would be great to have a Chili's and a Mongolian grill.

5c. Outdoor Recreation e.g. parks, cycling, trails, golf, boating, fishing?

- 1) #1 need is the bicycle pedestrian bridge 2) facility for sports tournaments (could be in conjunction with the high school) 3) NEED MORE ACCESS TO THE RIVER!!!!!! & more events related to the river to get us in touch with our greatest (missing) asset (one time Wilsonville sponsored a high speed boat ride down to Willamette Falls - it was great and we still remember it!!!)
- 1) Pedestrian bridge would be a difference-maker but has become no more than a distant dream. 2) One of the major assets is proximity to the Willamette River although there is limited access. The historic Tachman House overlooks the river and has been vacant for years. It is City-owned and certainly has the potential for adaptive re-use as a site that generates tourism.
- A marina with boat rentals or boat rides with lunch provided - high-light the good golfing in the area, especially Charbonneau with its reasonable rates and lovely ambience - Wilsonville needs a good indoor pool with sliding walls that could be open in summer
- Biking would be improved significantly with a bridge over the river to allow residents to bike to places like Champoeg park, and the surrounding beautiful agriculture land.
- cruises or houseboats on Willamette River more ball fields and basketball courts
- Develop a central 'Community Concierge' who can promote, book and schedule active outdoor fun - people don't realize resource, know how to access
- Develop packages for specific interests. For example, partner with Langdon Farms Public Golf Course, Sandelie Public Golf Course, & Oregon Golf Club to provide stronger "destination" for golfers.
- Have the City go literally full steam ahead on getting the bicycle-pedestrian bridge done, promote Wilsonville as "The Jumping Off Place" (like St. Luis was with the Oregon Trail) to bicycling the Willamette Valley. (funding has a large number of options that need to be explored beyond the normal 'public' financing...especially any further funding by the City!!! With the Bridge in place BY 2021 - the City of Wilsonville should put its name in the pot to literally host the 2024 U.S. National Olympic finals in bicycling to determine who goes to the 2024 Olympic Summer games!!!!!!!!!!)
- How about promoting the Wilsonville area as a catalogue and ad photography setting for Oregon's outdoor-oriented businesses?
- I think most locals know about all the parks, but a guide would help visitors access them better.
- Improve cycling access to French Prairie and beyond.
- its ok
- Lots of parks are good Better signage would help. Cycling can be aided by bridge over Willamette and a bike shop. Lot's of golf in the area including in Charbonneau. Again, more promotion of these and signage would help raise awareness. River activities would be aided by better direct access in town. The

docks across the river are just OK for larger craft but not so good for canoes and kayaks. Also, the port-a-potties there are usually gross.

- Maps and info for group outings.
- need a bike-pedestrian bridge, developed waterfront access on north shore of the river
- No connected trails. Need more emphasis on good places to walk and hike
- Provide easy access visitor center with LIVE concierge to help direct visitors to historic sites with maps, and local businesses such as lodging, restaurants, dining, shopping, etc.
- River access.
- Sandy beach area for play by the river
- Some sort of activity on the river - houseboat rides?
- Something more on the river. Maybe something like high speed boat rides. Like in southern Oregon in Grants Pass. Hellgate Jetboat.
- The city has many good park options, but the overall connectivity is poor: no decent bike/ped connectivity near Memorial Park/Murase Park and Town Center Park; numerous bike routes that are unsafe and/or have unexpected, abrupt endings!

5d. Cultural e.g. performing and visual arts?

- A performing arts center has been talked about for years. But where, at what cost and who pays?
- A performing arts center is the top of my list-- ideally as an Arts Wellness Center with a swimming pool next to the performing area.
- An Arts Wellness new facility needs to be built to house events and experiences. We don't have a cultural center!
- Better promotion of the few existing opportunities would help.
- City needs to set aside a small percentage of SCDs for public art.
- Combined maybe with more of a convention center, Wilsonville NEEDS a performing arts venue/facility. The middle school has a spring music festival the breaks the fire code for number of people in the middle school gym. Wilsonville has had a high school a cappella group that has made it all the way to national television - and we have no facility that can adequately present the arts. This is one of the major factors that creates a sense of community, and puts beauty in our lives. I also love the sculpture program that has placed various sculptures around town. I'd like to see that expanded, and maybe even placed along the pedestrian/bicycle paths--the city needs find ways to support this program which I understand is currently going under.
- Doing good on this.
- I believe some kind of facility which combines a performing arts facility (music, drama, art, etc.), aquatic facility, large sports complex for tournaments, and/or a Discovery Center (to capitalize on tourists, local history, heritage, etc.) should be done. All are needed, but there is a concern whether Wilsonville is big enough to handle and maintain all four
- Need to develop more - other than 'fun in the park' not much in the way of arts and culture
- need venues
- Provide easy access visitor center with LIVE concierge to help direct visitors to historic sites with maps, and local businesses such as lodging, restaurants, dining, shopping, etc.
- Provision for a cultural/performing arts center; Provision for a true regional-scale amphitheatre
- Though we have a great Wilsonville Theater Company, we really need a performing arts center with a decent theater for them to use and grow in.
- Use Library more for all cultural activities. Develop packages & advertise them in nationwide (better yet have feature articles in) magazines, e.g. AAA. Packages would be partnering with lodging facilities,

restaurants, & cultural activities to put together a targeted visitor menu to choose from. (e.g., in Ireland they have castle's host a dinner & show by local performers . . . an upscale version of dinner & a movie).

- We need a performing Arts Center. Why not have a center which could also serve as a conference facility?
- Wilsonville could be promoted for its "transportation" features. The former ferry across the river, the horse power at Hunter Creek, and the race car museum in the works.
- Wilsonville Theater Company produces surprisingly excellent performances. Definitely need a better venue and publicity.

5e. Events and festivals?

- 1) The City needs to get behind and help promote the equestrian events to the west of the City during the summer - it's sad that the City has totally neglected the ;potential pot of gold this represents. 2) the City needs to put its name in the pot to host the 2024 U.S.National Bicycle Olympic Finals in conjunction with the new bicycle-pedestrian bridge.
- A local event high-lighting all the local horse facilities, trainers, etc would be interesting with horse rides and events - More info about national horse shows would be good -
- BBQ cookoff competition with Saturday preliminaries and Sunday afternoon finals. Maybe have Traeger Grills sponsor.
- BBQ grill competition Car show in cooperation with World of Speed
- Beer or wine festival. Food festival. Parade.
- Host a mud run!!!!! Renaissance fair?
- Make them more unique. E.G. Festival of Arts is very stale and doesn't draw very many people outside of exhibiting artists! (more crafty than art) family & friends. (FYI a neighboring community selected same wknd as FOA a couple years ago, had more elite/diverse artist representation, beer & wine available, later evening opportunities/times, and drew attendance tenfold greater.
- more of them
- More volunteers needed to present ther Wilsonville Festival of Arts the 1st June weekend
- Need some big ones to bring in people.
- Promote the Parade and Festivals in Town Center Park Employ a promoter to have a series of performing arts events all summer long in Memorial Park. Celebrate Korean Culture at Memorial
- Provide easy access visitor center with LIVE concierge to help direct visitors to historic sites with maps, and local businesses such as lodging,restaurants,dining,shopping,etc.
- Provision for a true regional-scale amphitheatre
- Sponsor cycling related events similar to the Harvest Century that would bring folks into the city for the week end.
- Summer art festivals need more volunteers
- The Arts Week end we have in June is limited and should be expanded
- The summer is pretty packed right now with excellent events that all are very family friendly! Keep using tourism dollars to support what we have to keep the cost free or cheap for visitors.
- We need a multi-cultural event. Bring the local ethnic groups together for a two-day festival.
- Wilsonville has some great events/festivale already. I've always been concerned that the City doesn't get behind and do more to promote things like the nationally rates horse horse shows in the private farms just west of the City - Wilsonville benefits greatly from them, but doesn't seem to do anything to help promote them (and thus itself). I also have great concern about the Chamber of Commerce being kicked out of the

center of town and now we don't have a place to go to get area and regional brochures. I think the City needs a huge hand in advertising the events it has already.

5f. Agri-tourism e.g. equestrian, wineries, farms ?

- Agri-tourism could go hand in hand with bicycle tourism. There are many routes that could showcase beautiful land by biking. Again, a bridge for crossing the river would open many opportunities here.
- Are there wineries here?
- Development/support for wine-tasting centers
- eliminate zoning restrictions on event-related concessions, package day tours
- Hunter Farms holds national show-jumping events but I've not seem obvious advertising for locals to attend. They welcome everyone to the events.
- I agree that we are in a location that can totally take advantage of this whole topic and options. The title represents three huge population groups that could easily be capitalized on and bring them to the City - which would have to have a tremendous impact on
- In connection with the new bicycle-pedestrian bridge, bicycle tours could be a big thing coming out of Wilsonville. With a convention type center, I think some kind of big event/fair/convention could annually be held in Wilsonville promoting farm equipment, farm products (wines, etc.), equestrian related stuff, etc.
- Promote equine events Wine tours which start at Wilsonville Nursery tours in late spring or summer
- Promote winery and farm passports.
- Provide easy access visitor center with LIVE concierge to help direct visitors to historic sites with maps, and local businesses such as lodging,restaurants,dining,shopping,etc.
- Put together "affordable" EQWINE (get it?) 2-3 day pre-planned packages . . . so everyday person can sample equestrian experience, organic/natural local produce/foods and homemade wares, and local wines.
- Stay in Wilsonville, take day trips to farms, vineyards and horse events. Develop a guide bus service with trained docent to visit area farms etc when the flowers, fruit and food is at it's peak - tie into culinary school where people are taught to buy at the peak of harvest and cook the delights at home
- These seem to be holding their own very nicely.
- Use the series of shows at Hunter Creek to promote local events and sites. Competitors generally spend all their time on the show grounds; however, the adult competitors & parents of young riders may return to the area to tour the sites if they know what's available. This is a group with upper-middle class/upper class incomes. They may be attracted to the wineries, specialty ag businesses, cultural/historical sites, etc. Include tourism promotion with the show entries, local businesses should sponsor jumps and/or classes. Currently there is nothing at the show grounds to attract non-horse people. Consider working with Hunter Creek to create a picnic area and educational materials to explain more about training and competing horses and exactly what they're seeing in the rings.
- We have some very attractive areas around us. One group that is into destination experiences is runners - there is a wine country half-marathon in Yamhill County. It would be great to develop a similar themed event here to attract folks from outside the area.
- Why not mobilize our bus system to take people to horse events, wineries and the like. This could be done on the basis of a modest fee system.

5g. Sense of place e.g. Downtown aesthetics, streetscapes, city gateways and sense of welcome?

- 1) Wilsonville spent some money on some nice monumnets at the Wilsonville Road off ramps. Unfortunately, the 'feeling' had not been followed through anywhere else. 2) TREE CITY efforts need to

continue 3) A more accessible Visitor Center needs to be established (which could be part of a 'DISCOVERY CENTER) 4) the Christmas/winter lights put on the trees in the middle of Wilsonville Road should be left up year round and begin a theme of The City of Lights. 5) Need to keep a balance of 'aesthetics on BOT" H sides of the freeway. 6 Better signage - and standard signage directing people to various locations around town.

- aesthetics already good, more information needed at the interchanges announcing the city
- An arch with a high-tech representation of a horse and an electronics item could be interesting
- BETTER SIGNAGE including Wayfinding signs
- Better signage. Merchandize 'Tree Tour' of Tree City, where each tree tells a different story of Wilsonville's heritage - Have Charlotte Lehan develop this under a heritage contract
- City doing a marvelous job - keep it that way;-))
- City is divided. Makes a gateway impossible.
- I really enjoy the lights the City puts on the trees down the middle Wilsonville Road in the winter. I'd love to see them up all year - with maybe at time changing them out to be colored lights, then later back to all white for a change now and then. The City could kind fo become a City of Lights. Also would like to see more banners all around town - simlar banners on both sides of the freeway to put up a hard copy visual that we are all one City regardless of which side we are on. In this sense, the City does need to be pulled together a lot more than it is. More maintenance and care needs to be taken in the City monuments at the freeway off ramps (would like to see the five flags put back on them for national holidays - like it was when they were first constructed). I think we need more use of a City emblem. I'm concerned that the one that has been used for the past 20 years is no longer overly representative of what Wilsonville has or is becoming. With unique architecture on the bicycle-pedestrian bridge, I think that the outline of the bridge would make a great background for the City!
- I-5 exit signage to produce a sense of welcome to events
- Lights focused on the mural under the bridge to highlight its beauty. Even with street lights and daylight, it is still pretty dark under the bridge. The lighting, even in the daytime would make it more welcoming and better show off the mural.
- Like the Christmas lights
- Pretty good now.
- Signage at I-5 exits to show the way to events would be very good for sense of welcome
- The downtown looks nice.
- We have no "downtown*. Our existing retail centers are designed for local and regional auto traffic, not for tourism (poor visitor and pedestrian access, poor connectivity, poor aesthetics for pedestriars, etc.)
- We have no real 'downtown'.
- What downtown? We lost that with what has become of the Town Center area and the widening of the intersection. If one is getting off of I5 as a tourist, where does he/she go? One already needs a destination and GPS to find most things.
- Wilsonville needs something iconic to identify with. It doesn't have a large building, or structure that is unique to Wilsonville. One opportunity for this may be in the proposed French Prairie Bridge. A beautiful signature bridge could become a landmark for the city, and the region.

5h. Visitor Information e.g. brochures, websites, signage, wayfinding?

- 1) I love the idea of a "DISCOVERY CENTER" concept due to the amount of local history options. 2) Smart phone stuff is fine, but not all of us are "up to date" in this way and I am still a strong believer in the printed word - need to flood the area/region a lot more with brochures 3) a strong webpage indeed

is critical, too however 4) City needs to find a standardization of signage - to bicycle paths, to historical places, to shopping centers, etc. 5) city needs to promote itself "IN" the local hotel rooms

- All good.
- Better signage.
- Definitely better signage, including wayfinding signs. Need brochures promoting events, housing, food, etc.,
- Definitely needed.
- don't really see any?
- Hate to say it, but -- billboards? Folks zooming up & down I-5 likely don't know why they should stop here.
- I-5 exit signage needed to guide visitors to events
- Improve availability of brochures etc.
- more and better signage, utilize commercial personnel to promote Wilsonville assets and events, identity catch-phrase needed
- more signage would be useful, brochures showing what good dining we have would be helpful
- More wayfinding signage On website have information on what to do in Wilsonville if (1) if you an extra hour (2) if you have an evening, (3) if you have a whole day.
- Not sure where visitors will find information such as brochures now that there no longer will be a Visitor Center and the Chamber is moving to a location that few visitors will be able to find.
- One good map brochure with OR code links to a very robust website - develop a good mobile app to lead people on visit. Have a unified 'look' for tourism signs with OR codes to give more information - keep graphic style clean - make it like a 'geo-tour' using GPS and OR's for deeper information about sites
- Provide easy access visitor center with LIVE concierge to help direct visitors to historic sites with maps, and local businesses such as lodging,restaurants,dining,shopping,etc.
- The more of all this the better. Wayfinding shows that a community is open to people who are not local and wants to help them find things/their way around. Common signage also helps to unify the City. Brochures of local things help even locals enjoy and/or be aware of local options we may not have thought of. Websites are becoming more important (even though I personally don't use it much!!!)

6. If you could add anything to strengthen Wilsonville's tourism MARKETING or how it PRESENTS ITSELF to outsiders, what would it be?

- 1) Need to keep the small town feel - by design and purpose both. 2) Needs to develop some things for tourists to come to Wilsonville for and to do, and a means to get to them easily (i.e. the shuttle service)
- Can we piggyback on Portland and Metro marketing?
- coordinate county, city, and business web presentations, with more events and recreational facilities to market
- De-emphasize the commercial aspects and spend more time on improving the livability and sustainability of the place
- Develop a UNIQUE niche. I have a concept developed - just ask;-))! It's low cost in that it uses (actually promotes) the existing infrastructure (lodging facilities & restaurants), can eventually run throughout the year (not seasonal), & after a year or two will build an International niche!
- Find a defining unique brand
- Get Wilsonville recognized on other local web sites. Nobody looks for Wilsonville directly now. At some time in the future when Wilsonville has more attractions a kiosk or more with info would be useful.

Perhaps outside the library or City Hall? Using the international "i" symbol to direct visitors to them would help.

- I'm really sold of the idea of branding. Wilsonville doesn't have any kind of central/major thing to attract people to it. I feel extremely strongly that the bicycle-pedestrian bridge could and can more than supply this. Bicycle tourism is growing hugely. Wilsonville lies at the door of a major metropolitan area that is already classified as the #1 bicycle city in the country, and right across the river from Wilsonville are literally hundreds of miles of open roads throughout the central and southern Willamette Valley. It can promote Wilsonville in a huge variety of ways. If planned in a way that in itself attracts tourism, it can add to our heritage, our victory draw, etc. It will be an extremely important link in a total west coast bicycle path - which already can be linked from the State of Washington across the 205 Bridge, the Sweetwater Corridor across the Sellwood Bridge, and the State Willamette River Scenic Bicycle Trail from Champoeg State Park to Eugene (with talk of taking it on to the California border!!!!) I also like the thought of a local panel that would ongoingly advise on this topic
- list all the stables and horse-related places in the area, possibly have a tour once a year and let people experience the barns, riding arenas, paddocks, etc. Wilsonville had the only American to make the finals in equestrian in the Olympics - make use of this type of information
- Need a big event to happen!
- Needs a big brand overhaul and huge marketing campaign. Need more to draw people here.
- Provide easy access visitor center with LIVE concierge to help direct visitors to historic sites with maps, and local businesses such as lodging, restaurants, dining, shopping, etc.
- Special sections on city's website for: (1) Coming for a visit?, (2) thinking about moving here?, (3) want to locate your business here? and (4) 10 reasons Wilsonville is the best place to live, work and play.
- The ability to provide positive activities for the tweens and teens.
- The Chamber of Commerce has, in the past, marketed and presented itself to outsiders. Hope it will continue.
- Think we should encourage private investment in a Hostess House development on Boones Ferry at the river. This would be a non-denominational chapel, bakery, apparel rental and sale, florist, etc. so we could promote as a place to have weddings.
- Water park like sunriver!!!!!!
- We need to define place and market a clear identity: Wilsonville: The Gateway City - Let your Adventure begin here!
- Wilsonville is more than "Horse Country." There's heritage and water recreation that also can be promoted. The pedestrian bridge would be magic, but I don't think it will ever happen.

7. If you could add anything to strengthen the EXPERIENCES that Wilsonville extends to visitors, what would it be?

- Attract a big event.
- Close proximity of hotels/motels and visitor attractions, i.e. wine-tasting, retail shopping, Fun Center, parks; without competing with automobiles, traffic and 5 lane roadways.
- Expand Sculpture program. Get a downtown art gallery started where artists could display their work.
- I'd like to see a brochure, or some kind of small "thing" representing Wilsonville be placed in every hotel room for every visitor that come to Wilsonville. Show the quality that is Wilsonville. As stated above--a coordinated signage system around town helping folks be able to find their way around town both helps them and shows a city-unity.

-
- In addition to visual, performing and literary arts, many experiences could be offered to visitors in a new center
 - It seems that the primary source of visitors is folks coming to visit family. Making maps, guides and similar resources available to local families so they can enhance the experience of their visitors.
 - Many different experiences could be offered in a new Arts Wellness Center
 - more events in more venues, packaging
 - more high quality dining of a greater variety
 - More interpretive information using QR codes and 'push' apps which tell people about specials, events and great visitor tips. Hash Tag promotions - use social media to create a sense of excitement
 - More river type stuff.
 - Promote local heritage, including the proximity to the "birthplace" of Oregon, Champoeg. 2) Much of the art at the library is unknown even to residents!
 - Provide easy access visitor center with LIVE concierge to help direct visitors to historic sites with maps, and local businesses such as lodging, restaurants, dining, shopping, etc.
 - Some kind of Welcoming Kit in every hotel room - could have brochures, local coupons, lists of local events (maybe they'll come back for something!!) - don't know how to pay for it, but maybe a real flower in cheap vase in each room rather than just the same general purpose room they walk into anywhere else, or some other local 'item' that would represent Wilsonville and make the experience different than any other place.
 - Without Chamber manning a Visitor's Center anymore, will there be a city employee devoted to tourism?

WILSONVILLE FUTURE

8. In TEN YEARS what are the most significant additions that you would like to see in Wilsonville in regard to recreation, leisure and tourism?

- 1) Pedestrian bridge 2) Adaptive re-use of the Tauchman House and surrounding property.
- 1) bicycle-pedestrian bridge over the Willamette; 2) an aquatic center with unique enough features to make it a draw; 3) a convention center emphasis (come spend money)
- A horse venue near town to host major west coast horse events - locate on southern Langdon Farms, market as the major Equestrian Competition facility on the west coast. Turn Memorial Park into great baseball and soccer fields for hosting competitions, athletic camps and other sports attractions.
- A new bicycle/pedestrian/emergency vehicle crossing of the Willamette river is essential. This could connect the city with the surrounding communities like nothing else could. I would also like to see the area on the south side of the river near the marina developed more to include kayak rentals, and perhaps a restaurant.
- A performing arts center and theater.
- Again, a big event for the city to hang its hat on.
- An actual and for real emphasis on tourism, and its encouragement. I've lived here many years and have never been aware of ANY efforts in this direction until this current effort.
- An Arts Wellness Center to be built housing a theater auditorium, Gallery space, and swimming pool.
- An equestrian center that accommodates hunter/jumpers, dressage, eventing, western cutting & reining, etc.
- bike-ped bridge, aquatic center, conference-event center, riverside park development
- Bridge over Willamette. A community center with pool and entertainment venues for the arts and possibly for small conventions would be a real asset.
- Central arts and culture center.
- City pool and skateboard park

-
- Develop a quiet and attractive connection with the River at Boone's Ferry (and across the river!), with accompanying shops, restaurants, and connections to the French Prairie area
 - More ball fields and basketball courts for tournaments Activities on the river
 - More diverse shopping. Sports complex for competitive teams as a regional draw. Public pool or water park.
 - Multi Purpose Building housing an Arts Center and Conference Center. Old Town Enlargement.
 - Some river activity.
 - To get an identity.
 - Utilize the river.

9. In TEN YEARS when speaking to people outside of Wilsonville, what is it that you would like to say with greatest pride about the city as a place to visit?

- A beautiful river town full of surprises, Great shopping good restaurants . River access
- Great place to stay, shop, eat and play: The gateway to greater bike, river, agri, wine and Heritage - Make Wilsonville your base camp for your Next Adventure!
- Historic Wilsonville, since the days of The Oregon Trail, has been the gateway to the Willamette Valley.
- "Have you seen the new bridge? It's beautiful, and allows people to bike all the way up the Willamette Valley! Also I love the way they've redone the Old Town Neighborhood with several cute shops, and great new restaurants."
- It learned how to change from a suburb to a destination.
- It's a great place to live!
- It's the perfect gateway to beer, wine, heritage , and cycling.
- Low crime, friendly people, very clean and welcoming.
- Safe walking routes and free bus service to access the great restaurants from the hotels/motels. Central location for urban events in Portland and recreational activities in the valley.
- That we are a city right next to large metro area with all its advantages, but the small town feel and atmosphere. That as visitors they would feel valued and welcomed in our town as different from just having had a 'standard' hotel room, no info on what to do, no services developed on their behalf, etc.
- There is a lot to do in Wilsonville.
- We have continued to have a quality city here!
- What makes Wilsonville a great place to stay as a visitor is what makes it a great place to live--safe, friendly, convenient, with lots to do and enjoy within easy reach.
- Wilsonville has great cultural facilities and parks ,and schools to raise children and enjoy the cultural amenities
- Wilsonville is a great place to live, work and recreate.

10. The following statement represents the current tourism vision for Wilsonville. In what ways do you consider this statement should be changed or updated to make it Wilsonville's 2024 tourism vision?

Vision:

In 2015, Wilsonville with a family-oriented and culturally attractive town center and Boone's Landing Heritage Area, is the premier corporate, group meeting and leisure recreation venue in the Willamette Valley between Portland and Salem.

- Add or exchange "French Prairie" for Boone's Landing Heritage area.

-
- Boring - hire a creative advertising person or ask for local volunteers - Hi tech and Horses need to be part of the vision
 - Does not sing. This is better: Wilsonville is the perfect basecamp for your Willamette Valley Adventure: Stay, eat, shop here, so you can ride, wine, see, hike, paddle and play in our the natural beauty of the wonderful Willamette Valley."
 - First of all, I've never read or even heard of this before. If there is anything 'current' in this as a current goal, this is one area the City has not communicated very well. I hae no idea how to intrepet what the "attractive town center" or the "Boone's Landing Heritage Area" even is/are! I live what's known as Old Town, and have been active in Old Town, but I have not heard word one about a "Bonoes's Landing Heritage Area." Other comments - Why do we have to stop at Salem. I think Wilsonville has potential of outoding Salem because of its location close to Portland, the international airport, etc. In short, I love the concept that this statement makes, I question the dedication that the City will put into making it a reality (before or after 2015), but I think it is the number one best way of hugely increasing the econmic potentials of the city!
 - I would drop the references to corporate and group meetings. Without significant growth in hotels and meeting venues, it isn't very realistic. (And I'm personally not convinced it is a desiraeable demographic to pursue.)
 - It is perfect.
 - It's probably OK as is if some of the things that should have been done get done.
 - Love it.
 - Nice, aggressive vision to have in 2015, but certainly not today.
 - Premier? I wouldn't consider Wilsonville any of that - needs a lot of work to make that happen.
 - Sounds Great!
 - This is not so much an accurate description of the city in 2015 as a vision for what it could be in 2025. But substitute community for town center an Boone's Landing Heritage Area. There is no single town center, but there is a sense of community that stands to be strengthened by more infrastructure and activities that are also inviting to tourism.
 - This statement needs to be updated to reflect new realities. Families are different Wilsonville is too homogeneos . Not enough diversity Why is corporate meetings so important?
 - We are not premier corporate, group meeting or leisure at this time. We need another nice hotel, restaurant group meeting facilities and develop river activity and wine tours along with bus to Spirit Mountain for gambling
 - We don't really have a town center - thus that term needs to be dropped or one developed! 2) In all the years living in Wilsonville, I have no idea what the "Boones Landing Heritage Area" is or refers to - and I live in Old Town near Boones Landing. So the same thing, that needs to be dropped or something developed to be what the term suggests! 3) Considering "the premier corporate, group meeting and leisure recreation venue in the Willamette Valley ..." - Premier? What is the competition for the title? There isn't any. So I don't even really know what this really means. Since right now we don't have ANY corporate or group meeting facilities (outside of what the Holiday Inn can do or what can be done in our larger open parks) this whole concept is totally unrealistic. Unless a huge amount of private resources are going to be attracted to put such facilities in before 2024, I think that the whole thing needs to be totally revamped and worked -- I mean, ".. the premier corporate,group meeting ... venue ..." over what? Woodburn? They don't have any that I'm aware of so the title of "premier" is totally empty and utterly meaningless. Thus my input is that the whole "Vision" needs to be redone. Unfortunately, I don't have time or space here to make a suggestion. I'd be glad to help a group out to work on it.

THANK YOU

11. Would you like to make some additional comments?

- Due to our location, we need to focus on business travelers. For that reason, we need another major hotel.
- I am sincerely impressed that the City is taking this step. I have truly high hopes. With plans like the bicycle-pedestrian bridge, an aquatic center, etc. already in the works, I realize that these things need to be planned from a very big picture point of view -- which government too often doesn't do.
- I think that this is an extremely valuable effort that the City is putting in here. I am concerned however, the obligations of the company AFTER they make their findings/presentation to the City next year. Do they continue to work as equally intently on helping this new VISION become a reality - or do they get paid their check and then just fly off to the next city to work on?????? Indeed, how much devotion is the City going to have with what will come out of this process considering that it will ultimately end up causing the expenditure of a bunch of City dollars!!!!
- I would like to hear and understand the actual objective(s) in the City's tourism development strategy. Why is there a bias towards "tourism" and against other "attractants"?
- In making our town a tourist destination we don't want to sacrifice any of the qualities that make Wilsonville a wonderful place to live and work. There need be no incompatibility in the two goals. In fact they should be pursued as complementary.
- Is there a way to attract/go after some big name events during the summer? It would be great to have a sports event or two to look forward to in our town.
- Really, really really can't stress enough skate park & city pool/community center.
- The City should conduct this program with a series of contractors - no permanent hires, just contractors, organized and administered by The Leo Company.
- The French Prairie Bridge is key to the region's future. It needs to be a priority and may not be as difficult to pay for as most people think. There are many funding sources out there for projects like this, it's just a matter of utilizing them.
- Time to rebrand and get rid of city's "hand and tree" symbol. It worked well for a fledgling town that developed, but it is now dated. We need to rezone Ralph Elligsen's property to bring in needed commercial - a tourist attraction such as Cabelas, an upscale hotel, or perhaps a major department store.
- You've developed one heck of a SWOT instrument - really need to receive broader participation ;-(I have several ideas on how - just ask. [I used to be part of Bonneville Power Administration's Market Intelligence Group so I am very familiar with Strengths-Weaknesses-Opportunities-Threats (SWOT) analyses.]

12. It is NOT necessary to identify yourself. However if you would like to, please add your name and organization here.

- Danny Abrego Portland Reign Photography
- Doris Wehler
- Gary Wappes gwappes@gmail.com
- Greg & Rachel Leo The Leo Company Greg@theleocompany.com (503) 804-6391 A proud supporter of Wilsonville Tourism Development !

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- I am submitting these ideas for Vern Wise since he cannot attend the open house on Oct. 16. Doris Wehler
 - Kathleen Mason Aurora Colony Historical Society
 - Keith Amundson Arts 7 Culture Allianc of Wilsonville
 - Mick Scott
 - Neil Cernitz CERNITZbike
 - Randy Wortman randal.wortman@gmail.com
 - Steve Van Wechel
 - Steven L. Van Wechel - past President Old Town Historical Neighborhood Associaion 25+ year resident of Old Town
 - Suzy Sivyer - 31414 SW Isle Way Lane; West Linn, OR 97068; 503-655-0212 President & Partnering Coordinator of Wilsonville Friends of The Library.

Tourism Development Strategy Task Force

A Tourism Task Force was appointed by the City of Wilsonville and is comprised of the following members. Task Force meetings were held on 24 October and 12 November 2013.

Name	Title	Affiliation
Denny Atkin	Resident	Advertising Director, The Oregonian (retired)
Eric Bohard	Chair	City of Wilsonville Parks & Recreation Advisory Board
Jeff Brown	General Manager	Holiday Inn - South Portland/Wilsonville
Emily Corley	General Manager	McMenamins Wilsonville Old Church and Pub
Bryan Cosgrove	City Manager	City of Wilsonville
Danielle Cowan	Executive Director	Clackamas County Tourism & Cultural Affairs (CCTCA)
Julie Fitzgerald, Chair	City Councilor	City of Wilsonville City Council
John Hanna	Club Manager	Willamette United Soccer Club
Darren Harmon	General Manager	Wilsonville Family Fun Center
Carolyn McCormick	President/CEO	Washington County Visitors Association
Susan Myers	General Manager	Capital Realty Corp.
Chris & Liz Perry	Market Managers	Wilsonville Farmers' Market
Cheryl Snow	Executive Director	Clackamas County Arts Alliance
David Stead	General Manager	Langdon Farms Golf Club
Mary Stewart	President	MARStewart Creative Group
Tonie Tollen	Owner	Tollen Farm
Daphne Wuest	Board Chair	Clackamas County Tourism Development Council

The following staff members assist the taskforce in organizational matters:

Name	Title	Affiliation
Jim Austin	Community Relations Coordinator	Clackamas County Tourism & Cultural Affairs (CCTCA)
Annie Bailey	Communications & Public Relations Coordinator	Clackamas County Tourism & Cultural Affairs (CCTCA)
Barbara Jacobson	Assistant City Attorney	City of Wilsonville
Mike Kohlhoff	City Attorney	City of Wilsonville
Jason McGill	Chief Financial Officer	Washington County Visitors Association
Mark Ottenad	Public/Government Affairs Director	City of Wilsonville
Kristin Retherford	Economic Development Manager	City of Wilsonville

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Appendix 1

Wilsonville Internet Marketing Analysis

This study has been commissioned in conjunction with the Assessment phase of the Wilsonville Tourism Development Strategy. It provides a snapshot of Wilsonville's online profile. It presents an inventory and cursory analysis of where Wilsonville stands at this moment in being able to respond to visitors' on-line information needs.



Wilsonville

Internet Marketing Analysis:

Internet Inventory & Task

Force Considerations Part 1

Author:

John Hope-Johnstone CTC, CIM (Certified Internet Marketer)

*“We are all drowning in data and yet starving for
knowledge”*

2013

Wilsonville Internet Marketing Analysis: Internet Inventory & Task Force Considerations Part 1

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Introduction:

The closing of the bricks and mortar Wilsonville Visitor Center at the end of 2013, is an event we expect will be replicated in some other communities over the next 10 years, as mobile and voice recognition technology become ubiquitous. We feel that Wilsonville can be on the cutting edge of developing a more robust digital tourism presence that will satisfy its visitors' need for information and help the local economy grow.

HPR Internet Marketing usually completes a much more robust analysis for its clients. However, the Wilsonville on-line visitor presence is presently very limited. We have been able to assemble an abbreviated report with enough data to help us develop recommendations when the time comes to create a more robust presence for Wilsonville.

We will produce two reports for the Task Force. This one, which is an inventory and cursory analysis of where Wilsonville stands at this moment in time in being able to respond to visitors on-line information needs. A second report will be presented in late February 2014, which will outline the future on-line needs of Wilsonville.

At the moment, the Wilsonville tourism presence does not have one "authoritative" website dedicated to tourism. It does have a number of pages on the Chamber site that are valuable.

Wilsonville also has affiliations with Clackamas County Tourism, Washington County Tourism, the Willamette Valley Visitor's Association and Travel Oregon. However, Wilsonville itself has no dedicated digital tourism presence upon which to complete a full analysis.

We cannot underestimate the need for an "authoritative" site. Google stated in early 2013, "we (Google) are doing a doing a better job of detecting when someone is an authority in a specific space. It could be medical; it could be travel, whatever. And trying to makes sure that those rank more highly, if you are some sort of authority or a site that according to the algorithms we think might be a little bit more appropriate for users."

In this report we have analyzed the visitor pages of the Wilsonville Chambers' site, Oregon Horse Country, Clackamas County and Washington County Tourism, Willamette Valley Visitors Association and Travel Oregon (State). What story can these metrics tell? Can they help build a persona of the kind of people that are interested in Wilsonville?

With over 5 million overnight visitors pouring into the Willamette Valley annually (Longwoods 2011) spending over \$1,535 million, the potential for Wilsonville to grow its tourism base is

substantial. In addition, these visitors will spend \$487 million in Washington County and \$419 million in Clackamas County (some duplication will be found in these numbers).

With its proximity to I-5 the tourism growth question is obviously not about traffic volume, it is how to stop it, and bring it into Wilsonville to spend money.

How important is Internet Marketing to Destination Marketing Organizations (DMOs)?

The Internet is used by 83 percent of leisure travelers to plan travel. Digital, social and mobile media are constantly evolving as new channels, tools, functionality and consumer behavior patterns emerge.

Tourists visit, on average, 17-22 websites across several search sessions before they're ready to make a travel decision (varying according to length of trip). That number is quite staggering! But it speaks to the importance of having a comprehensive digital marketing strategy that ensures your destination's story is properly represented on all channels a searcher might visit.

A robust Social Media presence is also vital for high search rankings for a DMO. 86% of DMOs are on Facebook averaging 23,352 likes. 79% are on Twitter averaging 4,155 followers. 49% are on YouTube averaging 115,000 views. (Source: DMAI)

Internet Marketing Inventory (limited):

The following could be considered the present official tourism websites for Wilsonville: (Not to be considered inclusive):

www.wilsonvillechamber.com
www.oregonhorsecountry.com
<http://www.ci.wilsonville.or.us/>
<http://www.mthoodterritory.com/>
<http://www.oregonswashingtoncounty.com/>
<http://www.oregonwinecountry.org/>
<http://www.traveloregon.com/>

Official Wilsonville Facebook Pages: (Only those directly in the control of Wilsonville)

<https://www.facebook.com/pages/WilsonvilleOregon/389223771144050>
<https://www.facebook.com/CityofWilsonville?ref=mf>
<https://www.facebook.com/oregonhorsecountry>

Other Social Media:

YouTube Channel: <http://www.youtube.com/user/CityofWilsonville/videos>
Twitter account: <https://twitter.com/ORHorseCountry>
<https://twitter.com/wilsonvilleor>
Flickr account: <http://www.flickr.com/photos/wilsonville1> (City)
E-Newsletters: Yes
Pinterest: www.pinterest.com/search/pins/?q=Oregon%20Horse%20Country

3: Six Key Sites Analysis (limited): The Wilsonville Chamber's visitor section; Oregon Horse Country; Washington County Tourism; Clackamas County Tourism; Willamette Valley Visitors Association; Travel Oregon.

The story is revealed by viewing the changes in the point of origin of the searches and in the ranking of search terms and mobile usage.

Mobile usage varies also between pages showing possibly whether the person is on the ground in Wilsonville, or is still planning their trip.

The number of searches taken over the past 12 months is very low for each visitor page and therefore any conclusions really must be tempered by that fact.

Wilsonville Internet Marketing Analysis

a:



Wilsonville Chamber Internet Visitor Analysis

(Visitor Pages Only):

Date range: July 1, 2012 to June 30, 2013

Total Unique Visitors to total Chamber Site: 19,804 (Total Site).

Pages (in order of ranking)	Unique Visitors
1: Where to Stay	233
2: Where to Eat	259
3: What to do	214
4: Visitors	195
5: Shopping & Ent	165
6: Great Outdoors	127
7: Affiliation	122
8: Bicycling	107
9: History & Heritage	91
<u>10: Farm Fresh</u>	<u>87</u>

Total: 1,600 Unique Visitors or 8% of the total Chamber's unique visitors

Mobile usage to whole Chamber site: 3,141 UV or 15% of total visits. (Visitor Section is not on mobile site.) Not included in this list is the Community Calendar, which is held in a separate database. During the same period of time this events calendar had 111,692 users.

Wilsonville Chamber Visitor Section Analysis:

Visitor Pages in order of rank. Including geographical source of search, keywords used, mobile use, Internet source:



Visitor-Where to Stay, (lodging, hotels etc)

Geographical origins of searches during the period from July 1, 2012 to June 30, 2013 were as follows. (Ranked by importance):

1. Portland
2. Port Angeles
3. Seattle
4. Eugene
5. Temecula
6. Bend
7. Salem
8. Elma
9. Sequim
10. West Hollywood

Top keywords: (the majority of keywords are now encrypted (hidden) by Google)

Wilsonville OR

Wilsonville Chamber

Wilsonville OR Chamber

Source for this page:

Mobile 12% (since the Chamber's visitor section is not on the Chamber's mobile site, these numbers reflect people searching the Chamber's regular site on their mobile device, and hence a high bounce rate.)

Google

Chamber main site

Bing

Yahoo

Wilsonville Library site

Comcast

fun-center site

search netzero.net

B:



Visitors-Where to Eat

Geographical origins of searches during the period from July 1, 2012 to June 30, 2013 were as follows. (Ranked by importance):

1. Portland
2. Wilsonville
3. Seattle
4. Salem
5. Tualatin
6. Oregon City
7. Honolulu
8. Eugene
9. Semmes
10. Los Angeles

Top keywords: (Note: The majority of keywords are now encrypted (hidden) by Google)

Wilsonville Chamber

Wilsonville OR

Restaurants in Wilsonville OR

Starbucks Agyle Square

Boones Ferry Wilsonville

Source for this page:

Mobile 16%

Google

Chamber

Direct

Bing

Yahoo

AOL

mywebsearch.com

C:



Visitors-What to Do

Geographical origins of searches during the period from July 1, 2012 to June 30, 2013 were as follows. (Ranked by importance):

1. Portland
2. Wilsonville
3. Seattle
4. Beaverton

5. Tualatin
6. Canby
7. Lake Oswego
8. Salem
9. Vancouver
10. New York

Top keywords: (the majority of keywords are now encrypted (hidden) by Google)

- 1 Wilsonville
2. Wilsonville Chamber
- 3.Things to do in Wilsonville OR
4. Things to do near Wilsonville OR
5. What is there to do in Wilsonville
6. Wilsonville visitor center
7. Wilsonville
8. Wilsonville or things to do
9. Fun activities to do in Wilsonville

Source for this page:

Mobile 23%
Google
Chamber
Bing
Yahoo
Visit Washington County
Wikipedia
Fun-center

Wilsonville Internet Marketing Analysis

D:



Visitors

Geographical origins of searches during the period from July 1, 2012 to June 30, 2013 were as follows. (Ranked by importance):

- 1 Portland
2. Wilsonville
3. Beaverton
4. Seattle
5. Eugene
6. Florence
7. Sandy
8. Lake Oswego
9. Tualatin
10. Aberdeen

Top keywords: (the majority of keywords are now encrypted (hidden) by Google)

- 1 Wilsonville Chamber
2. Wilsonville Oregon
3. Wilsonville OR
4. Wilsonville, OR
5. Visit Wilsonville Oregon
6. Wilsonville Oregon Chamber
7. Wilsonville Oregon visitors
8. Wilsonville visitor center
9. Free concerts in Wilsonville
10. Horse shows in Wilsonville

Source for the last page:

- Mobile: 11%
 - Chamber
 - Google
 - Bing
 - Direct
 - Yahoo
 - Wikipedia
 - Oregon Live
 - Oregon State Parks
-

E:



Shopping – Entertainment

Geographical origins of searches during the period from July 1, 2012 to June 30, 2013 were as follows. (Ranked by importance):

1. Portland
2. Beaverton
3. Salem
4. Seattle
5. Tualatin
6. Hillsboro
7. Pendleton
8. Vancouver
9. Wilsonville
10. Victoria

Wilsonville Internet Marketing Analysis

Top keywords: (the majority of keywords are now encrypted (hidden) by Google)

- 1 Wilsonville Oregon
- 2 Chamber
- 3 Wilsonville Shopping
- 4 Wilsonville Visitor Center
- 5 North Wilsonville shopping
- 6 Wilsonville
- 7 Wilsonville Oregon Entertainment
- 8 Wilsonville attractions
- 9 Wilsonville new shopping center

Source for this page:

Mobile: 21%

Chamber

Google

Bing

Yahoo

Direct

City

Comcast

Traveltips.usatoday.com

F.

The screenshot shows the Wilsonville Area Chamber of Commerce website. The header includes the logo and navigation links. A 'GOLD MEMBERS' section is visible. The main content area features a 'GREAT OUTDOORS' section with the following text: 'Get outside and enjoy Wilsonville from one of our beautiful parks or area golf courses. Longhorn Farms is a stunning horse and equestrian park in the south side of town and beautiful Golf Course features Wilsonville in the east Wilsonville is home to over 100 acres of public parks. 14 large trails, river walks, wooded trails, ponds and water-view spaces are scattered throughout Wilsonville. The new Clatsop State Natural area features Oregon's trees and flowers the area nature intended with trails and interpretive displays for visitors the learn about the plants they see. Wilsonville park is a great place to play and the park hosts various sporting events and is perfect for picnicking. Fun family water funerals on Town Center park and flower park provide world-class summer fun with fun and safe ways to get wet and wild Pick up a park guide at the Visitor Center or visit the City of Wilsonville site for details on park facilities and more.

Memorial Park - Memorial Park in the City is oldest and largest park, and the city is center for active outdoor recreation and organized community team sports. The natural landscape of the park provides wonderful opportunities for walking and observing wildlife. Tennis courts, ball fields, picnicking, nature trails, playgrounds, and more, all waiting in a beautiful garden. 4000 SW Memorial Dr., 503.622.1377

Business Park - This park in the former location of Business Park which crossed the Willamette River for 107 years. The Taubman House is a fine of the century historic house owned by the city. A trail under the River bridge connects Business Park to Memorial Park.

Wilsonville Water Water Treatment Plant Park - This park contains a spectacular water feature over 100 feet long celebrating the importance of water to the community.

Below the text is an image of a fair with the text 'SOMETHING FUN FOR EVERYONE!'.

Great Outdoors

Geographical origins of searches during the period from July 1, 2012 to June 30, 2013 were as follows. (Ranked by importance):

Wilsonville Internet Marketing Analysis

- 1 Portland
2. Salem
3. Beaverton
4. Tualatin
5. Wilsonville
6. Seattle
7. Abbotsford
8. Eugene
9. Grants Pass
10. Mukilteo

Top keywords: (the majority of keywords are now encrypted (hidden) by Google)

- 1 Wilsonville Oregon
2. Chamber
3. Wilsonville
4. Things to do in Wilsonville Oregon
5. Wilsonville or
6. Wilsonville visitor center
7. Camping near golf course
8. Charbonneau Wilsonville hiking
9. Langdon farms
10. Picnic area Charbonneau

Source for this page:

Mobile: 20%
Google
Chamber
Bing
Oregon State Parks
City
Search-help.net

G.



Visitor Center Affiliations:

Affiliations on this page are the RDMOs of Washington County Tourism and Clackamas County Tourism into which Wilsonville is divided.

Geographical origins of searches during the period from July 1, 2012 to June 30, 2013 were as follows. (Ranked by importance):

- 1 Portland
- 2. Wilsonville
- 3. Tualatin
- 4. Salem
- 5. Las Vegas
- 6. Beaverton
- 7. Florence
- 8. Sherwood
- 9. Seattle
- 10. Spokane

Top keywords: (the majority of keywords are now encrypted (hidden) by Google):

- 1 Wilsonville Oregon
- 2 Logos travel guide book
- 3 Chamber
- 4. Wilsonville Oregon
- 5. Wilsonville visitor center
- 6. Oregon Landmark Logo
- 7. Rafting logo
- 8. Travel Oregon Logo
- 9. Washington County Visitors Assoc Logo

10. Wilsonville

11 Wilsonville Chamber

Top Source for this page:

- Mobile 5%
- Google
- Chamber
- Direct
- Bing
- Google.de
- Mt.HoodTerritory.com

H.



Farm Fresh

Geographical origins of searches during the period from July 1, 2012 to June 30, 2013 were as follows. (Ranked by importance):

1. Portland
2. Abbotsford
3. Beaverton
4. Mukilteo
5. Seattle
6. Wilsonville
7. Tualatin
8. Lynnwood
9. Grand Prairie
10. Honolulu

Wilsonville Internet Marketing Analysis

Top keywords: (the majority of keywords are now encrypted (hidden) by Google)

1. Wilsonville
2. Wilsonville Oregon
3. Chamber
4. Wilsonville Visitor Center
5. Business in Wilsonville
6. Lavender Farm
7. Pumpkin Farms
8. The farm Wilsonville Oregon

Source for this page:

Mobile: 16%

Google

Chamber

Direct

Oregon State Parks

Bing

Yahoo

City

Mt.HoodTerritory.com

I.

The screenshot shows the Wilsonville Area Chamber of Commerce website. The header includes the logo and navigation menu. The main content area is titled "HISTORY & HERITAGE" and contains several paragraphs of text. To the right of the text is a logo for "OREGON'S MT. HOOD TERRITORY".

History and Heritage

Geographical origins of searches during the period from July 1, 2012 to June 30, 2013 were as follows. (Ranked by importance):

1. Portland
2. Beaverton
3. Wilsonville

4. Laguna Niguel
5. Lake Oswego
6. Robert Bird Cemetery
7. Sherwood
8. West Linn
9. Woodburn
10. Sacramento

Top keywords: (the majority of keywords are now encrypted (hidden) by Google)

- 1 Gustav Emil Tauchman
2. Meridian cemetery
3. Chamber
4. Historic Wilsonville
5. History Boones Ferry Road
6. Robert C Bird Cemetery
7. Chamber
8. Wilsonville 1950s
- 9: 1914 Wilsonville History
- 10 Barn Boones Ferry Road

Source for this page:

Mobile 24%
Google
Chamber
ASK
Bing
Yahoo
Direct
AOL
Comcast

J:



BICYCLING IN THE WILSONVILLE AREA

The Wilsonville area is home to some of the finest cycling routes in the South Metro Region. Exploring the landscape in and around Wilsonville by bicycle will definitely spend hours of rewarding activity.

Beginner cyclists should be exploring many of the city's parks and be sure to check out the Tongue Trail as it snakes through Graham Oaks Nature Park.

The adventurous cyclist should consider shunting out into the Tualatin Valley along Adams, Homestead, and Mountain Road.

For those of you craving a leg-dripping climb, be sure to roll out to some of the region's notable hills. A Wilsonville hill route would be incomplete without visiting Petes Mountain Road, Ladd Hill, and/or Parrett Mountain. For the particularly ambitious and masochistic cyclist, try your best on Heater Rd.

If you're looking for a challenge, download the Strava app for your iPhone or Android mobile device and by getting some K.O.M. (King of the Mountain) points and see how you stack up to other cyclists in the area.

Be sure to finish your ride in Wilsonville at one of our many fabulous dining establishments for a refreshing snack and drink.

...and of course, ALWAYS wear a helmet and appropriate clothing.

Bicycling in the Wilsonville Area

Geographical origins of searches during the period from July 1, 2012 to June 30, 2013 were as follows. (Ranked by importance):

- 1 Portland
2. Wilsonville
3. Beaverton
4. Tualatin
5. Salem
6. Bend
7. Canby
8. Newberg
9. Longview
- 10 Mukilteo

Top keywords: (the majority of keywords are now encrypted (hidden) by Google)

- 1 Wilsonville
2. Wilsonville Area Bike Clubs
3. Wilsonville Cycling
4. Bicycling south of Wilsonville
5. Bike paths Wilsonville
6. Business in Wilsonville
7. Family bike loop
8. Parrett Mountain Bike Ride
9. Parrott Mountain and Ladd Hill map
19. Petes Point Wilsonville OR

Source for this page:

- Mobile 10%
- Google
- Chamber
- Direct
- Bing
- City
- Wikipedia
- Fun-Center

k.



Oregon Horse Country:

Although designed more to be a Chamber for equestrian activities and more statewide than local to Wilsonville, it still represents a strong Wilsonville brand presence on the Internet.

(July1, 2012 to June 30, 2013)

Total Unique Visitors 8,575

Organic Search 3,402 UV 71% Bounce

Referral 1,222 40%

Social Media Feed 306 70%

Wilsonville Internet Marketing Analysis

Mobile 19%

Visitor Point of Origin: (In order of importance)

Portland
Seattle
Beaverton
Salem
Bend
Molalla
Oregon City
Eugene

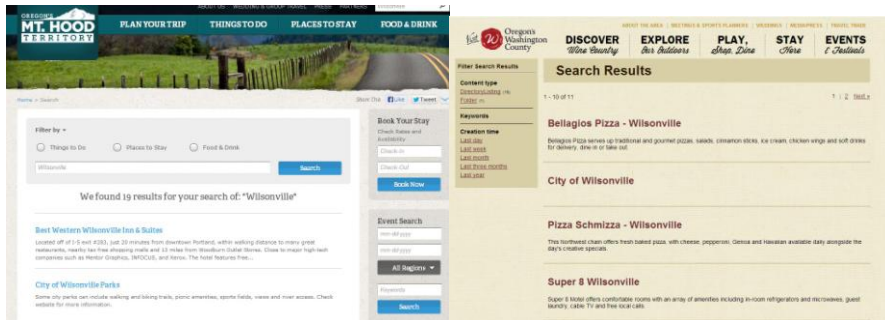
I. Chamber and Horse Country Social Media Presence:

Chamber Facebook: 871 likes

Oregon Horse Country:

Facebook: 2,329 likes

Twitter: 26 followers



m. Clackamas County Tourism and Washington County Tourism:

Washington County Tourism and Clackamas County Tourism both give excellent service, as regional DMOs for Wilsonville, however, they are not dedicated sites for the City. These two sites contributed 758 visitor sessions towards Wilsonville brand awareness.

Top pages visited on their sites for Wilsonville include:

Wilsonville
Horse Back Riding
Wineries/ Farms
Festival of the Arts
About the Area

Wilsonville Internet Marketing Analysis

Pheasant Ridge RV Resort
Family Fun Center
Lodging/Campgrounds
Floatin' On Air Balloon Adventures
Wilsonville Parks and Recreation
Things to do for Family Fun
Active Outdoors/Wilsonville
Hotels/Lodging
Wilsonville Chamber
Boones Ferry Park



Willamette Valley Visitors Association (WVVA): www.oregonwinecountry.org

WVVA is a regional destination marketing organization dedicated to promoting the whole of the Willamette Valley for tourism. This site contributed 143 pageviews to Wilsonville's brand awareness during the July 1, 2012 to June 30, 2013 time period. Many of the pages seem to be 404 (cannot find), this can be for a variety of reasons, including the time period viewed. WVVA has been notified and we will work on it together to resolve.

Wilsonville Internet Marketing Analysis



o:

Travel Oregon (State Tourism Office): www.traveloregon.com

Travel Oregon's website is designed to represent the entire state. However, Wilsonville's information needs to be updated regularly into a central repository aptly named the Orb and done through either Washington County or Clackamas County tourism through the Willamette Valley Visitors Association.

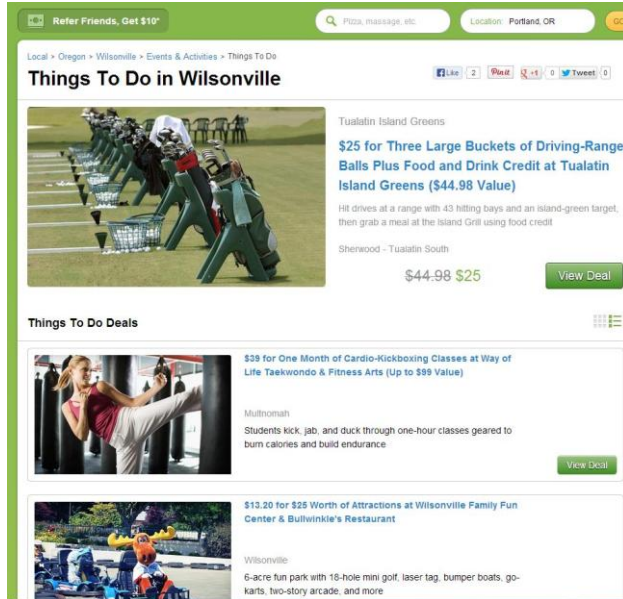
With over 1.2 million unique visitors a year this is the state's most powerful referral tool if used properly.

Travel Oregon launched a new and even more powerful site nearly two years ago and has received over 400 unique pageviews for Wilsonville during the time period July 1, 2012 to June 30, 2013.

3: Who Presently Represents the Wilsonville Tourism Brand on-line?

Using the key search phrase used often by tourists, “What is there to do in Wilsonville”, the following appear on the first page of the search results page (SRP). (In order:)

1: Groupon:



2: Brad Hanson (Facebook):

Wilsonville Internet Marketing Analysis

3: Wilsonville Chamber of Commerce:

The screenshot shows the homepage of the Wilsonville Area Chamber of Commerce. The header features the logo "WILSONVILLE AREA CHAMBER OF COMMERCE" with the tagline "A South Metro Business Advocate" and the date "Friday October 18th 2013". A navigation menu includes links for HOME, ABOUT, COMMITTEES, NEWS, DOING BUSINESS, BUSINESS DIRECTORY, EVENT CALENDAR, VISITORS, RELOCATION, and CONTACT US. A "GOLD MEMBERS" section lists several local businesses. The main content area is titled "WHAT TO DO?" and includes a paragraph about the Visitor Center, a list of activities, and two photographs of local events.

WILSONVILLE
AREA CHAMBER OF COMMERCE
A South Metro Business Advocate

Friday October 18th 2013 Mission: Business is the priority Hot Deals Jobs Facebook Search | Login | Join

HOME ABOUT COMMITTEES NEWS DOING BUSINESS BUSINESS DIRECTORY EVENT CALENDAR VISITORS RELOCATION CONTACT US

WHAT TO DO?

What to do? We would love to help you answer that question!

Search the links throughout our website, or if you'd rather talk to a person (in person!), we have a lovely Visitor Center open 7-days-a-week from 8:30 a.m. to 5:00 p.m. Monday to Friday and from 10:00 a.m. to 4:00 p.m. Saturday and Sunday. The Visitor Center is in Wilsonville, right off I-5. There are signs to follow from I-5 or read the directions on the Contact Us / Directions page. Feel free to stop by to pick up information on everything imaginable! State-wide tourism attractions, maps, events, guides, trails, camping, scenic drives and more! Or call us and a helpful Visitor Center Information Specialist will help you pick the best fit! 1-503-682-3314.

- Agri-Tourism
- Amusement Parks
- Attractions (regional)
- Biking/Cycling
- Dining
- Equestrian Activities
- Events
- Farm Tours
- Horse Shows
- Lodging
- Mt. Hood Territory
- Oregon Coast
- Oregon Horse Country
- Rodeos
- Shopping
- Ski & Snowboard
- Trail Riding (Horse)
- Travel/Portland
- Washington County
- Willamette Valley Wine
- Wineries
- Yamhill Wine Trail



4: USA Today:

The screenshot shows a USA Today article titled "Things to Do in Wilsonville, Oregon" by Caryn Anderson. The article includes a photo of a vineyard, a list of related articles, and a sponsored link for "Visit Area Wineries" with a "BOOK NOW" button. The article text describes Wilsonville's location and offers suggestions for activities.

USA TODAY NEWS SPORTS LIFE MONEY TECH TRAVEL OPINION WEATHER

This story is part of **TRAVEL TIPS**

Things to See & Do Portland, Oregon Things to Do Around McMinnville, Oregon Things to Do With Kids in Clackamas County, Oregon Things to Do With Children in Portland, Oregon

Things to Do in Wilsonville, Oregon

TRAVEL TIPS Caryn Anderson, Demand Media



Wilsonville is within 10 miles of wine trails, vineyards and wine-tasting rooms.

RELATED ARTICLES

- Things to See & Do Portland, Oregon
- Things to Do Around McMinnville, Oregon
- Things to Do With Kids in Clackamas County, Oregon
- Things to Do With Children in Portland, Oregon

and red wines such as Pinot Noir, Syrah, Tempranillo and Merlot. Tasting rooms are located in Newberg, 15 miles west of Wilsonville; Dundee, 17 miles away; and Carlton, 26 miles away. Wilsonville is situated near wineries and vineyards on the "East of Eden, Molalla Canby and Silverton" wine trail that starts 10 miles east of Wilsonville in nearby Canby.

Wilsonville's Parks

Wilsonville is home to more than a dozen parks, including the city's largest park.

AdChoices

- ▶ Fun Things to Do for Kids
- ▶ Things to Do in NY NY
- ▶ Art/Craft for Kids

Sponsored Link

Optimize Your Website
Serve the right content to the right person at the right time.
www.getsmartcontent.com

Visit Area Wineries

Whether you are an experienced oenophile or a novice wine enthusiast, Oregon's Willamette Valley (oregonwinecountry.org) has a winery to suit nearly any taste. Wilsonville is part of the state's Mount Hood Territory, and it is home to several vineyards that produce white wines such as Chardonnay and Riesling.



BOOK NOW

LASVEGAS.COM

Wilsonville Internet Marketing Analysis

5-6: Oregon Live: Two responses on the SRP

The screenshot shows the OregonLive.com website with a search bar and navigation menu. The main article is titled "Things to do in Wilsonville" and is dated March 13, 2013. It features three items:

- Wine Tasting and Silent Auction:** Hosted by the Wilsonville Relay for Life Team, Up All Night, to raise money for the American Cancer Society. It includes details about the event on March 14 at Abella Italian Kitchens.
- Hospice Volunteer Training:** A program for supporting hospice patients and families, with registration and training details.
- Community Garden:** A section for creating and maintaining a garden.

There are social media sharing options (Facebook, Twitter, LinkedIn, Email) and a sponsored section for "THE MESA FOR ENTREPRENEURS".

7: Trip Advisor:

The screenshot shows the TripAdvisor website for "Things to do in Wilsonville". It features a search bar, navigation tabs, and a list of attractions:

- Family Fun Center:** Ranked #1 of 7 attractions in Wilsonville. It has 29 reviews and is categorized as an Amusement/Theme Park.
- Carabella Vineyard:** Ranked #2 of 7 attractions in Wilsonville. It has 1 review and is categorized as a Winery.
- Villebois Sunday Market:** A section for reviewing this attraction.

There is also a "Hotels travelers are raving about..." section listing hotels like Pheasant Ridge RV Park, Super 8 Wilsonville, and Holiday Inn Portland South. A map and search by location feature are also visible.

Wilsonville Internet Marketing Analysis

8: Hotel Planner:

Hotel Planner .com

BEST things to do in Wilsonville OR + Stuff to see

Hotel Deals | Group Hotel Rates | Extended Stays | Meeting Space | Corporate Meetings | Event Calendar | More

Best things to see in Wilsonville OR Oregon

Wilsonville attractions are listed below. Find things to do in or near Wilsonville, OR for your upcoming individual or group travel for Wilsonville visitors. We also offer the great discounts on Wilsonville Oregon hotel and motel rooms.
Reserving group travel? [Save with Wilsonville Group Rates](#)

Find hotels discounts! Rooms: 1 | Check-In: | Check-Out: | West Linn | **Check Rates**

Attractions + Things To See in Wilsonville

#1 of 30 Things To Do in Wilsonville
South West Portland
Tualatin OR
4.95 miles from Wilsonville city center

Downtown Portland lies in the Southwest section between the I-405 freeway loop and the Willamette River, centered around Pioneer Courthouse Square ("Portland's living room"). Downtown and many other parts of inner Portland have compact square blocks (200 ft [60 m] on a side) and narrow streets (64 ft [20 m] wide), a pedestrian-friendly combination. Many of Portland's recreational, cultural, educational, governmental, business, and retail resources are concentrated downtown, including: South Park Blocks, Pettygrove and Lovejoy Parks, and Tom McCall Waterfront Park. Ariene Schnitzer Concert Hall, Portland Art Museum, and Oregon Historical Society Museum. Portland City Hall, Multnomah County Courthouse, the Portland Building, Pioneer Courthouse, and Mark O. Hatfield United States Courth...

More on South West Portland >

#2 of 30 Things To Do in Wilsonville
Tualatin
Tualatin OR
5.88 miles from Wilsonville city center

Tualatin is a city located primarily in Washington County in the U.S. state of Oregon. A small portion of the city is also located in neighboring Clackamas County. It is a southwestern suburb in the Portland Metropolitan Area that is located south of Tigard. The population was 22,791 at the 2000 census. The 2006 estimate is 25,650 residents. The name of the city is taken from the Tualatin River, which flows along most of the city's northern boundary. According to Oregon Geographic Names, a post office with the spelling "Tualitin" was established November 5, 1869, and the spelling changed to "Tualatin" in 1915. In the 1850s, the settlement was first called Galbreath after its founder Samuel Galbreath. In 1883 Galbreath built the first bridge over the Tualatin river, and the town became

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9: Virtual Tourist:

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Wilsonville Things to Do

Wilsonville Overview | Things to Do | Hotels | Forums

Wilsonville Things to Do

Reviews and photos of Wilsonville things to do posted by real travelers and locals. The best tips for Wilsonville sightseeing.

Wilsonville Things to Do Map

View Larger Map

Experience Wilsonville

- 11 Tips
- 50 Photos
- 4 members live here

Most Recent Things to Do in Wilsonville

10: Family Days Out



Conclusions for this section:

The above are presently Wilsonville’s digital message as taken from the first page of the search results page (SRP). We are not suggesting that the above sites don’t properly do the job intended for their own particular purpose. However, there is no consistent theme, brand message or authority that brings together the visitor message for Wilsonville.

Basically, Wilsonville is leaving its brand image to whatever top ten sites or social media pop up on the first search results page.

4: Considerations and Discussion Points for Task Force:

When considering a Wilsonville digital tourism information footprint rather than a bricks and mortar visitor center, here are some of the key considerations: (Note: This analysis makes no recommendations to the Task Force as to who should operate any new digital footprint.)

a: **A dedicated visitor website:** A dedicated, well researched and maintained visitor site with a good social media and blog presence will receive considerably more searches than being a part of another site. This is due to the fact that a search engine algorithm sees such a site as a dedicated “authority” of information and resources for the Wilsonville area.

b: The new site will already have **excellent partnerships** established that can provide supplemental resources, such as event databases and other tourism-based information through the Wilsonville Chamber, Clackamas County Tourism Development (Mt. Hood Territory), Washington County Visitors’ Association, Willamette Valley Visitors Association and Travel Oregon partners.

c: It must collaborate with **Travel Oregon’s** massive site receiving over 1, 250,000 unique visitors each year and keep that site posted of Wilsonville events.

d: **A major social media presence** and blog supporting of the dedicated visitor website can add 55% more hits to that site’s volume.

e: **Of highest value is a robust mobile site (not app).** For many travel destinations a mobile site is often a secondary consideration. However, because of the nature of the Wilsonville visitor (traveling by car or possibly already in town and needing to gather information quickly) a robust mobile site is of vital necessity. For example nearly 30% of Mt. Hood Territory’s website comes through a mobile device. This can be accomplished by either a separate mobile site or developing the main site with “responsive design,” both have their advantages.

f: **Digital Kiosks:** A robust mobile site can be complemented by a few strategically placed digital touch screen kiosks. We recommend that the value of such digital devices is only maximized when attached to the one thing the smart phone is missing (usually)... a printer. A separate operating system is not a requirement in today’s world — just a Wi-Fi connection to either the mobile or main site. A digital kiosk in today’s world can actually be a simple touch screen wide monitor in a secure location. Our recommendation is that this is often best located in areas of high density and secure areas, such as hotel lobbies.

g: A word of caution. John Naisbitt wrote in his 1980s best seller Megatrends about hi-tech vs. hi-touch. John stated that the more hi-tech we become the more hi-touch we need to provide as well. Somewhere in this digital enterprise there should be a **human element**. A “talk to a local” is always popular. This can be accomplished through “Live Chat” connected to both the main site, the mobile and the kiosk.

h: Geo-fencing: Programs that incorporate geo-fencing allow an administrator to set up triggers so when a device enters (or exits) the boundaries defined by the administrator, a text message or email alert is sent. The technology has many practical uses. For example, a marketer can geo-fence a retail store in a mall and send a coupon to a customer who has downloaded a particular mobile app when the customer crosses the geo-fence boundary.

The location and management of these positions is not the purpose of this draft document but for the consideration of the Task Force.

I: Staffing: (The following is only a rule of thumb and not etched in stone. A full recommendation will come within the second report).

Staff Hours: How many hours will it take to create a good social media and Internet presence? (Not including Webmaster, paid search, or SEO experts.)

- i. **3 to 4 man-hours per workweek:** If you have three to four hours each week then you have enough hours to look, listen and learn. To open up a Twitter account and facebook and any others that you may find interesting and get involved by dipping your toes in the water. Mainly reading at this stage and seeing what is being said, and which platforms work best for you.
- ii. **5 to 6 man-hours per workweek:** If you have five to six hours each week then your organization can start becoming involved. By “becoming involved” I mean begin to build followers and friends and possibly add a short weekly blog or v-log. Now you are becoming a minimal content provider.
- iii. **7 to 10 man-hours per workweek:** With two hours per workday, your organization is becoming more engaged in social media and someone most likely needs to be appointed as a “Community Manager”. You are becoming involved in providing more effective social media content.
- iv. **11 to 20 man hours per workweek:** With roughly two to three hours per workday your organization is becoming a driving force in social media and is providing a significant social media presence, and you may need to assign a “Community Director’ to help your Community Manager and brand angels.

The above are discussion points for the task force. Additional elements will be proposed in the second document.

5: Summary and Conclusions:

a. Benchmarking:

Utilizing the key words presently being used for Wilsonville and recognizing that many of them are being encrypted by Google, and filtering them through Google's keyword analyzer, we can estimate that the potential search for Wilsonville area per month is around 17,640 searches (Google) or 211,680 annual global searches.

At present, using the fiscal year July1, 2012 to June 30' 2013, **Wilsonville was able to capture 11,476 searches or 5.42%** of the potential market from only keywords that we presently know and using all the partner sites.

Our objective within the new digital information footprint is to develop a robust Internet presence that captures a minimum of 50% of the searches being used for Wilsonville or 106,000 annual unique visits.

b. Mobile conclusions:

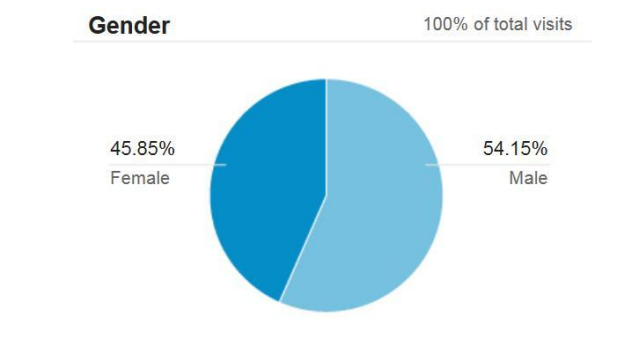
Averaging mobile use for all pages (where available), we discover that even without a satisfactory mobile presence over 16% of all searches were initiated on either tablets or smart phones.

- **Business travelers are more likely to actually book their travel on mobile** (32%) and consumers who use their mobile devices for travel-related services tend to have higher-than-average incomes.
- **Online travel is increasingly going mobile:** Not surprisingly, given the increased adoption of smart phones as travel tools, some of the largest online travel companies already report a significant percentage of their bookings via mobile.
- **Mobile is also particularly strong for last-minute hotel bookings:** "Hotel Tonight" (OTA) leverages the last-minute and spontaneous nature of many mobile-mediated travel bookings. Orbitz noted that "over 70% of reservations coming through smartphones are being done within a day of check-in," and Expedia reported that 68% of its mobile hotel reservations are done within 24 hours of the planned stay. Mobile has clearly created a new business opportunity in hotel booking, creating a channel through which to sell rooms that otherwise would remain unoccupied and unsold. (Source: Business Insider.)

c. Leveraging Partnerships:

The resources available through the many tourism partnership opportunities such as Clackamas Tourism and Washington County Tourism, Chamber, Willamette Valley Visitor’s Association and Travel Oregon are boundless. However, this requires staff time dedicated to keeping these partner sites up-to-date on tourism-worthy events and promotions.

d. Wilsonville Online Demographics: (High margin of error due to low numbers.)



e. Geographical Origin: The majority of present unique visitor searches are from within a 200-mile radius of Wilsonville. As the mobile usage is high we can extrapolate that at least 16% are already in the area when they complete the search.

Thank you for this opportunity to be of service.

6: Glossary of Commonly Used Internet Marketing Terms

301 Redirect – A 301 redirect automatically causes one url to redirect to another and tells the Web (and search engines) that this redirect is permanent, as opposed to a temporary (302) redirect. 301 redirects are generally preferable for Search Engine Optimization purposes and are therefore often referred to as search engine friendly redirects.

404 error means "not found". This is usually the page you get when you make a mistake spelling page name in a site, or if the page is deleted or moved. The problem is that the standard 404 page is ugly and unhelpful.

AdWords – AdWords is Google's paid search marketing program, the largest such program in the world and in most countries with notable exceptions such as China (**Baidu**) and Russia (Yandex). Introduced in 2001, AdWords was the first pay per click provider offering the concept of Quality Score, factoring search relevancy (via click-through rate) in along with bid to determine ad position.

Algorithm – The term search engines use for the formulae they use to determine the rankings of your **Natural Listings**. Search engines will periodically send a Spider through your Web site to view all its information. Their programs analyze then analyze this and other data to value your site and fix whether or not, and how high or low pages on your site will appears on various searches. These algorithms can be very complicated (Google alone currently uses 106 different variables) and search engines closely guard their algorithms as trade secrets.

Analytics – Also known as Web Metrics. Analytics refers to collection of data about a Web site and its users. Analytics programs typically give performance data on clicks, time, pages viewed, Web site paths, and a variety of other information. The proper use of Web analytics allows Web site owners to improve their visitor experience, which often leads to higher ROI for profit-based sites.

Backlinks – Links from other Web sites pointing to any particular page on your site. Search engines use backlinks to judge a site's credibility; if a site links to you, the reasoning goes, it is in effect vouching for your authority on a particular subject. Therefore, **Link Building** is an incredibly important part of **Search Engine Optimization**. How many links, the quality of the sites linking to you, and how they link to you all are important factors. Also called Inbound Links.

Banners – Picture advertisements placed on Web sites. Such advertising is often a staple of internet marketing branding campaigns. Depending upon their size and shape, banner ads may also be referred to as buttons, inlines, leaderboards, skyscrapers, or other terms. When using specifics, banner ads refer to a 468x60 pixel size. Banner ads can be static pictures, animated, or interactive. Banner ads appear anywhere on a site – top, middle, bottom, or side. Banner costs vary by Web site and advertiser; two of the most popular pay structures are **Cost per 1,000 Impressions (CPM)** and flat costs for a specified period of time.

Blog – Short for Web log, blogs are part journal, part Web site. Typically the newest entry (blog post) appears at the top of the page with older entries coming after in reverse chronological order. Several blogging platforms exist; our favorite is WordPress.

Click through Rate (CTR) – # of clicks / # of impressions. Click through rate is a common internet marketing measurement tool for ad effectiveness. This rate tells you how many times people are actually clicking on your ad out of the number of times your ad is shown. Low click through rates can be caused by a number of factors, including copy, placement, and relevance.

Content Tags – HTML tags which define the essence of the content contained within them and readable by search spiders. These include **Header** and **Alt Tags**.

Contextual Advertising – A feature offered by major search engine advertisers allowing your advertisement to be placed next to related news articles and on other Web pages. Contextual advertising seeks to match Web content from the display page with your advertised search term(s). Contextual advertising isn't perfect (what in life is?), but it's come a long way from its inception to the point where it can provide great value to advertisers when used correctly.

Conversion Rate – This statistic, or metric, tells you what percentage of people is converting (really!). The definition of "conversion" depends upon your goals and measurements. It could mean a sign up for free information, a completed survey, a purchase made, or other.

Cookie – Think of cookies like Batman's Bat Tracer. When you visit a Web site, Batman sticks a cookie on your browser to follow you around. Batman can then go back to his Bat Cave and watch where you're going and where you've been. A little Big Brother-ish to be sure, but cookies also provide direct benefits to surfers, including remembering passwords and bringing you offers in which you are genuinely interested (see **Behavioral Targeting** above).

Cost per Acquisition (CPA) – An online advertising cost structure where you pay per an agreed upon actionable event, such as a lead, registration, or sale.

Cost per Click (CPC) – A common way to pay for search engine and other types of online advertising, CPC means you pay a pre-determined amount each time someone clicks on your advertisement to visit your site. You usually set a top amount you are willing to pay per click for each search term, and the amount you pay will be equal or less to that amount, depending on the particular search engine and your competitors' bids. Also referred to as **Pay Per Click (PPC)** or **Paid Search Marketing**.

Cost per Impression (CPM) – A common internet marketing cost structure, especially for banner advertising. You agree to pay a set cost for every 1,000 **Impressions** your ad receives. Search engine marketing may involve CPM costs for **Contextual Advertising**. This internet advertising pay structure should really be called Cost per 1,000 Impressions.

Wilsonville Internet Marketing Analysis

Customer Relationship Management (CRM) – Software solutions that help enterprise businesses manage customer relationships in an organized way. An example of a CRM would be a database containing detailed customer information that management and salespeople can reference in order to match customer needs with products, inform customers of service requirements, etc.

Day Parting – Day parting refers to serving ads at different times of the day and days of the week, or even changing bids or copy / creative at different times. For example, you may not want your ads to show from 11AM-2PM on Tuesdays. This can be done manually in most online platforms, or automatically in some such as Google AdWords. Automated day parting is not currently available directly through many social media advertising platforms such as facebook ads and LinkedIn direct ads.

Description Tags – HTML tags which provide a brief description of your site that search engines can understand. Description tags should contain the main keywords of the page it is describing in a short summary – don't go crazy here with **Keyword Stuffing**.

Domain Name – A Web site's main address. Direct Online Marketing™'s domain is **directom.com**.

eCommerce – The ability to purchase online. eCommerce also goes by other super-snazzy names like etail. Web site features that allow ecommerce are commonly called shopping carts.

EdgeRank – The **algorithm** facebook uses to rank a page's or profile's posts to determine which of those posts will appear in the newsfeeds of users connected to those pages and profiles (or pages and profiles tagged in the posts). The higher an EdgeRank, the more likely you will appear in the newsfeeds. Facebook does not release this data publicly, neither for the pages, nor individual posts.

Email Campaign System – Email is perhaps the most overlooked and underutilized (based on cost and effectiveness) form of internet marketing today. Email campaign systems allow organizations to send out emails to their email lists with a standard look and feel. Features often include the ability to segment lists.

Forum – A place on the internet where people with common interests or backgrounds come together to find information and discuss topics.

Geo-Targeting – The ability to reach potential clients by their physical location. The major search engines now all offer the ability to geo-target searches in their **Pay-Per-Click** campaigns by viewing their ip addresses. Geo-targeting allows advertisers to specify which markets they do and don't want to reach.

Google AdWords Certified Partner – Google AdWords offers the most extensive certification process of any of the paid search marketing providers. The **Google AdWords Certified Partner** program replaces the earlier Qualified Google Advertising Company / Individual program.

HTML– HyperText Markup Language, the programming language used in Web sites. Developers use other languages that can be read and understood by HTML to expand what they can do on the Web.

Hyperlink – Often blue and underlined, hyperlinks, commonly called "links" for short, allow you to navigate to other pages on the Web with a simple click of your mouse. **This hyperlink takes you to a page with more information about Direct Online Marketing™'s free consultations.**

Internet Marketing – Any of a number of ways to reach internet users, including **Search Engine Marketing, Search Engine Optimization,** and **Banner** advertising. Direct Online Marketing™ specializes in these internet marketing services.

Internal Linking – Placing **hyperlinks** on a page to other pages within the same site. This helps users find more information, improve site interaction, and enhances your SEO efforts.

Keyword – Almost interchangeable with **Search Term**, keywords are words or a group of words that a person may search for in a **Search Engine**. Keywords also refer to the terms you bid on through search engine marketing in trying to attract visitors to your Web site or **Landing Page**. Part of successful **Search Engine Optimization** is including keywords in your Web site copy and **Meta Tags**.

Landing Page – The first page a person sees when coming to your Web site from an advertisement. This page can be any page on your Web site including your home page. Almost anytime you direct someone to your Web site from an advertisement, you should send them to a specialized landing page with tailored information to **increase your landing page conversion rate**.

Link Building – The process of obtaining hyperlinks (links) from Web sites back to yours. Link building is a crucial part of **Search Engine Optimization**.

Link Popularity – How many Web sites link to yours, how popular those linking sites are, and how much their content relates to yours. Link popularity is an important part of **Search Engine Optimization**, which also values the sites that you link out to.

Local Search – A huge and growing portion of the **search engine marketing** industry. Local search allows users to find businesses and Web sites within a specific (local) geographic range. This includes local search features on search engines and online yellow page sites. Optimizing for local search requires different practices than for traditional **Search Engine Optimization**.

Local Business Listings – Each of the major search engines offer local business listings that appear next to maps at the top of the page on many locally targeted searches. Business may either submit new requests or claim existing local business listings if the search engines have already added the company to the results. Having a Web site is not required for having a local business listing.

Long Tail Keywords – Rather than targeting the most common keywords in your industry, you can focus on more niche terms that are usually longer phrases but are also easier and quicker to rank for in the search engines. Long tail keywords can amount for up to 60% or so of a site's search traffic.

Wilsonville Internet Marketing Analysis

Microblogging – Microblogging refers to platforms allowing you to post information in snippets of 140 characters at a time via phone or Web.

Twitter quickly became the dominant global player to the point where its name is synonymous with microblogging. In China, however, there are other popular microblogging services, generically called weibo.

Mobile Marketing– As cell phone technology advances, advertisers can not reach their target audience virtually anywhere. While mobile marketing is really just an extension of online marketing, it provides businesses many new opportunities and challenges. How does your Web site look on your Blackberry or Treo?

Opt-in – This type of registration requires a person submitting information to specifically request he or she be contacted or added to a list. Opt-ins typically lower lead flow rates and raise **Costs per Acquisition** from internet marketing campaigns, but may produce higher percentages of interested leads.

Opt-out – Here people are automatically signed up to receive contact, but can opt out of receiving newsletters, calls, etc. at any time.

Organic Listings –See **Natural Listings**.

Outbound Links – Links on any Web page leading to another Web page, whether they are within the same site or another Web site.

PageRank – PageRank is a value that Google assigns for pages and Web sites that it indexes, based on all the factors in its **algorithm**. Google does release an external PageRank scoring pages from 1-10 that you can check for any Web site, but this external number is not the same as the internal PageRank Google uses to determine search engine results. All independent search engines have their own version of

PageRank. Potentially interesting fact: PageRank was named for Google’s Larry Page and it is calculated at the page level – pun fun!

Paid Listings – Listings that search engines sell to advertisers, usually through paid placement or paid inclusion programs. In contrast, organic (natural) listings are not sold.

Paid Search –Also referred to as Paid Placement, **Pay Per Click**, and sometimes **Search Engine Marketing**, paid search marketing allows advertisers to pay to be listed within the **Search Engine Results Pages** for specific keywords or phrases. Paid placement listings can be purchased from a portal or a search network. Search networks are often set up in an auction environment where keywords and phrases are often associated with a cost-per-click (CPC) fee. Google AdWords and Yahoo! Search Marketing are the largest networks, but Microsoft adCenter (live.com) and other sites also sell paid placement listings directly as well.

A good search engine marketing company offering Paid Search will select an exhaustive set of industry-related **Search Terms**, set up your accounts, write advertising copy, create **Landing Pages**, control your bidding (how much you’re willing to pay per Search Term click) and budgeting, and test and refine your advertising for effectiveness.

Pay per Click (PPC) – See **Cost per Click (CPC)**, above. The most common type of search engine advertising cost structure is PPC search engine marketing. Google, Yahoo, MSN, and many more search engines all use PPC.

Online Marketing™ does not include pop-ups or pop-unders as part of its internet marketing services.

Press Optimization – The optimizing of press releases for search engines. This process has many similarities to **Search Engine Optimization**, although it focuses much more on **Keyword** use in content creation in regards to how press releases are often picked up by **Blogs** and other forms of new media.

Rank – How well a particular Web page or Web site is listed in the **Search Engine’s Results**. For example, a Web page about apples may be listed in response to a query for “apples.” However, “rank” indicates where exactly it was listed – be it on the first page of results, the second page or perhaps the 200th page. Alternatively, it might also be said to be ranked first among all the results, or 12th, or 111th. Overall, saying a page is “listed” only means that it can be found within a search engine in response to a query, not that it necessarily ranks well for that query. Also known as position.

Reciprocal Link – A link exchange between two sites. Both sites will display a link to the other site somewhere on their pages. This type of link is generally much less desirable than a one-way inbound link.

Remarketing – Remarketing is Google AdWords’s term for **retargeting**.

Results Page – Also referred to as a **Search Engine Results Page**.

Search Engines – Search engines are places people go to search for things on the internet, such as Yahoo!, Google, or Bing. Most search engines provide Web sites two ways of appearing: Natural (free) and Paid. **Natural Listings**, also referred to as organic listings, appear based on the search engines’ own formulae. You can’t pay to have your site listed higher (although some search engines require that you pay to be included in the Natural listings), but you can perform **Search Engine Optimization (SEO)**. Paid Listings usually appear above or to the side of Natural listings and are typically identifiable as advertisements. The most common cost for advertising on Paid listings through **Paid Search** is **Pay per Click (PPC)**.

Search Engine Marketing – All forms of marketing involving search engines – chiefly **Search Engine Optimization** and **Paid Search Marketing**. Sometimes this term will also be used to refer to Paid Search exclusively.

Search Engine Optimization (SEO) – A fancy way of saying “making your site search engine friendly”. Search engine optimization is typically difficult to do on your own, especially given the increasing complexity and differences among all the search engines. Two important factors that rank highly in all major search engines are **Link Popularity** (how many Web sites – and how highly ranked those sites are – link to you) and relevant content (how pertinent information on your Web site or a particular Web page is to a search).

Wilsonville Internet Marketing Analysis

Search Engine Results Page – Search Engine Results Pages, or SERPs, are the Web pages displayed by any **Search Engine** for any given search. They display both **Natural (organic) Listings** and **Pay-Per-Click** ads. How high you are listed and where your ad is shown depends on **Search Engine Optimization**; and paid **Search Engine Marketing** respectively.

Search Terms – A search term is a word or group of words that a person types into a **Search Engine** to find what they are looking for. Based upon what a company sells, a Web site should incorporate the most popular or most popular specific search terms into the copy as **Keywords**. Figuring out the appropriate search terms to put into a Web site and to advertise on is a huge part of a Search Engine Marketer’s job.

SEM – Acronym for search engine marketing and may also be used to refer to a person or company that does **Search Engine Marketing** – either **Paid Search**, **Search Engine Optimization**, or both.

SEO – Acronym for **Search Engine Optimization** and may also be used to refer to a person or company that does search engine optimization.

Social Networking – A type of **Social Media**, social networking Web sites allow users to interact and create or change content on the site. These sites, of which businesses are now using for marketing purposes, allow users to create their own Web sites / online spheres (e.g. LinkedIn and Facebook), share photographs (e.g. Flickr), microblog / text small bits of information to their personal community (e.g. Twitter) or recommend information for others to find on the Internet (e.g. del.icio.us and Digg). The sites in this last grouping are also referred to as social bookmarking or social news sites. There are also a growing number of sites that are heavily dependent on mobile and geographic locations, such as Foursquare.

Spider – A noun and a verb, **Search Engines** have spiders crawl through all the linked pages of a Web site to gather information to include the site in their **Natural Listings** and also use to determine their ranking on various **Search Terms**.

Stickiness – How often people return to a Web site. Constant updates, news feeds, and exclusive content are all ways to make a site stickier.

URL – Uniform Resource Locator. These are the letters and symbols that make up the address of specific Web pages. This page’s URL is <http://directom.com/dom/semresources/internetmarketingtermglossary/>.

Unique Value Proposition (UVP) – In essence, what it is that sets your product, service, or company apart from others and why potential clients should care enough to choose you.

Universal Search – The placement of multiple types of results within a general search so that a user receives images, videos, local search results, news articles, and more next to general Web pages. Also called blended search.

Usability – How easy it is for a user to navigate a Web site and find the information he or she is seeking.

Webinar – “Web Seminar”. These virtual seminars allow people from anywhere in the world to attend via an internet connection. They offer tremendous opportunities for businesses to reach out to people over large geographic areas at low costs.

Web Metrics – See **Analytics**.

WordPress – **WordPress** is an extremely popular **Content Management System**. Developed originally for **blogs**, WordPress offers a great degree of flexibility and functionality. This site – and the **Found Blog** – are examples of WordPress sites.

XML – Extensible Markup Language. Content developers use this language with a variety of forms of content, including text, audio, and visual in order to allow users to define their own elements and pull the data at their pace. XML has played a huge part in the transformation of the Web towards **Web 2.0**.

Appendix 2

The Changing Role of DMOs in the Digital Age

The following article by Bill Baker (Total Destination Marketing) examines the changing environment that confronts destination marketing organizations across the USA.

The Changing Role of DMOs in the Digital Age

by Bill Baker, Chief Strategist, Total Destination Marketing

Destination marketing is a proactive, visitor-centered approach to economic and cultural development of a destination, which balances and integrates the interests of visitors, service providers and the community. Source: Karl Albrecht, DMAI Futures Study 2008

This paper is designed to stimulate thinking regard to the future structure, function and focus of destination marketing organizations.

The acronym DMO in recent decades has been used as the umbrella term for those organizations that are responsible for increasing visitor arrivals to destinations. In the past, a DMO has generally been referred to as a “Destination Marketing Organization”.

The term DMO is now undergoing some subtle changes where for an increasing number of places it is being referred to as a “Destination Management Organization”. This more fully embraces the DMO’s scope of responsibilities that must now extend far beyond the traditional role of promotion, sales and advertising.

Typically, a DMO may be a convention & visitors bureau (CVB), tourist bureau, visitors bureau, government department, chamber of commerce, or tourism office operated by another community entity. According to the most recent research from Destination Marketing Association International (DMAI), 65% of DMOs are independent non-profit entities, 5% of DMOs are chambers of commerce, and another 19% operate as a division of municipal, county, state or provincial government.¹The appropriateness of one structure over another is entirely determined by the local situation. It is influenced by the size of the community, its political and industry dynamics, destination strengths, target audiences, stakeholder focus, market maturity and funding which may all influence the DMO model selected.

The term “Destination Marketing Organization” does not clearly recognize the important and complex range of responsibilities that these organizations are increasingly tasked with. There are very few community-based organizations that have a more challenging and complex role than a DMO. No organization can have responsibility for marketing without also assuming responsibility for product development, service quality, and visitor services.

The Evolution of DMOs

Bill Geist in his book, *Destination Leadership* outlines the early evolution of DMOs:

“While the first pure convention & visitors bureau was established in 1896, it wasn’t until the late 20th Century that the CVB phenomenon took hold in North America. Prior to this time, the function of tourism promotion and development generally fell to the Chamber of Commerce. After all, this was

¹ 2011 Profile of Destination Marketing Organizations, Destination Management Association International

the organization charged with community ‘boosterism’ and, in that less competitive era ... centered on passing out brochures and maps to visitors who stumbled into the Chamber office.

As we hit the highways and skyways, an ever increasing number of lodging properties sprang up to welcome road and air weary travelers. Within a few years, the concept of levying a room tax on these properties spread across the land. And for the communities with a politically engaged hospitality industry, a portion, if not all of the room taxes were dedicated to attracting even more visitors to the community.

And then came the inevitable split. The Chamber, that had maintained a modest little tourism committee to oversee the distribution of brochures and maps, now often saw these committees armed with bigger budgets than the mothership. And, with a bigger budget committee members started to ask, ‘who needs the Chamber?’

It soon became apparent to competitor communities that the new styles of DMO were more effective with their singular focus on tourism sales and marketing. This in turn motivated many of the remaining Chamber-represented communities to petition their Cities and Counties to spin the destination marketing function away to a new independent tourism-focused organization. Access to the lodging tax revenues was a catalyst for most tourism-focused communities doing this during the 1990’s. There are still a few successful Chamber/ DMO combinations notably in Myrtle Beach SC, Asheville NC and Door County WI. However, they are in the minority.”²

The core roles of many DMOs has centered on:

- Marketing the destination to consumer, trade and special interest markets through traditional advertising and marketing activities
- Providing stakeholders with leads, insights and cost-effective access to markets and distribution channels e.g. meeting planners, tour operators, travel media etc.
- Production and distribution of information through websites, brochures, maps, visitor information centers etc
- The reduced effectiveness of traditional media and changing behavior of visitors has resulted in a migration to digital marketing through websites, mobile apps, social media and other digital tools.

What Has Changed for DMOs

This evolution of DMOs is continuing as they navigate the challenges of the Digital Age, as well as new competitors vying for the DMOs traditional roles, competing for public funds against other agencies, facilitating visitor experiences, requirements for more community involvement, changing consumer behavior, tightening conditions on their operations and accountability. As destination

² Destination Leadership for Boards, Bill Geist, Neverland Publishing 2007

marketing consultant and author, Alistair Morrison says, ³ “The broad scope of these issues means that a DMO can no longer just be ‘sales offices’ and ‘community megaphones’ for their tourism sectors.”

Today, forward-thinking DMOs are realizing that their destination, and its products and experiences must be of the highest quality to satisfy today’s discerning customers in a highly competitive and rapidly changing environment. Importantly, what the place promises to visitors, it must deliver!

The Digital Age has created a hyper-connected world in which traditional and digital media converge and prospective customers are bombarded with a dizzying array of choices, media channels and information. They are always online, sometimes multi-screening with devices that interact with each other. It’s a world where speed, choice and expectations have morphed and marketing is no longer a one-way dictate by DMOs, but must fit within an environment that demands interaction, transparency, flexibility and relationships.

While the fundamentals of destination branding haven’t changed, marketing as we have known it is largely superseded. Savvy DMOs are tapping social and mobile networks, smart phones and tablets, GPS apps, e-commerce and booking engines, Google maps, user-generated-content, kiosks, and the opportunity to economically reach consumers 24/7, and globally. Their websites can now deploy video, text, audio, booking systems, photos and real time comments from customers.

For DMOs the challenge now extends to being able to orchestrate and influence encounters so that they are as close as possible to the brand messages at every critical touchpoint. These touchpoints may vary for each customer and may be before, during or after their visit. They may be in the form of a photospot, trail, tradeshow, website, tweet, kiosk, smartphone, map, wayfinding sign or historic interpretation. It may mean collaboration with, and among, totally new partners in business, government and non-profits. Without this renewed focus, these DMOs will become irrelevant and obsolete.

The New Rules of Destination Marketing

While there have been many technological innovations, the most profound changes in the Digital Age have been to consumer behavior influencing how we communicate, buy, work, interact, engage, relax, learn, consume and react. All of these have a direct influence on destination brand image, preference and affinity. Whether DMOs choose to play in the digital realm is beyond their choice. User-generated content enables consumers to thoroughly compare options, rate experiences, post images, and make comments to assist others – before they have completed the experience!.

It’s easy to understand why some tourism offices around the world in the early days had the word “propaganda” in their names. However the days of a DMO simply pumping out advertising and brochures to influence consumer preferences are over. For customers, trust has now become key.

³ Marketing and Managing Tourism Destinations, Alistair Morrison, Routledge 2013

Rather than be threatened by these new rules and digital tools, DMOs should embrace them by fostering a city-wide culture of innovation, adaptation and collaboration. To thrive and survive DMOs must learn new skills and be more adaptive in conveying their destination's distinctiveness and benefits across myriad media, platforms and experience touchpoints that destination managers could not have imagined a decade ago. And to achieve this they must be guided less by politics and appeasement, and more by collaboration, product development, and true customer focus.

DMOs must orchestrate outstanding destination experiences through seamless collaboration with government, non-profit and business partners. There can be no gaps between expectations and the reality of the place. Delivering outstanding experiences is more important than ever. A bad experience will spread like wildfire and negatively impact your brand. Without DMO leadership, who will monitor and influence the experiences and expectations?

The Future Role of DMOs

This is the time for DMOs to reinforce their role as leaders within their community by defining their destination's brand, then orchestrate the messages and information content, unify partners, enhance customer experiences and gain a deeper understanding of their customers. Without an empowered DMO with a holistic approach to tourism, then the destination branding and marketing efforts will be adhoc and fragmented, and will certainly result in an under-performing visitor economy.

Responding to this new environment, successful DMOs are going to be those that:

- Provide leadership and advocacy for tourism
- Actively lead and manage the destination brand
- Maintain programs that provide opportunities to optimize their product distribution and sales to consumer, trade, meetings and special interest markets
- Establish a sound digital platform that incorporates internet marketing, mobile and social media that can lead marketing and intelligence gathering
- Provide accurate, definitive and relevant content for consumer, trade, media and other information distributors
- Ensure that partners are optimizing their product distribution, digital opportunities and cross-selling
- Align and integrate with other forms of place marketing such as economic development and relocation, cultural and recreation planning
- Collaborate with business, government and non-profits to orchestrate outstanding and competitive tourism products and visitor experiences
- Grow the collective capacity of the destination and its partners to enhance the destinations competitiveness, creativity and collaboration

- Enhance community and stakeholder awareness of the benefits of tourism

An important new role for DMOs in addition to mastering digital marketing is their involvement in product development. To close the gap with competitors and between visitor expectations and the actual destination experience, an increasing focus of many DMOs is moving to what may be generally describes as ‘product development’. This is the process by which new products, services and experiences are introduced and existing ones are improved. Even greater innovation is required here to remain relevant and competitive. These actions are essential to the destination’s sustainability and are a valuable conduit for increased profitability, job creation and investment. In this era, DMOs must play a cross-community role as orchestrators and trusted partners. Product development initiatives might include:

- Capital investments in hotels, attractors and infrastructure
- Events, festivals, tournaments and exhibitions
- Improvements such as trails, parks, and boardwalks
- Research, packaging, design and bundling of products, and experiences
- Service and quality improvement programs
- Placemaking in the form of more engaging precincts, streetscapes, gateways, public art, and public spaces
- Thematic interpretation

Which Path Forward?

“At a time when elected officials are searching for solutions to sluggish growth, unemployment, globalization, and continued economic challenges, an answer lies in travel and tourism. As an indispensable source of American jobs, travel and tourism has served not only as a ticket to opportunity during tough economic times, but with the right support in place, it can lead a path to future prosperity.”⁴

Critical to communities capturing their share of this lucrative trade is the way that they organize and lead their community to compete. The traditional approach through their DMO is changing and can no longer rely on one-way communications. Which will be the most appropriate approach for your city or region?

Those that choose to follow the destination marketing approach with their focus exclusively on marketing are more likely to face the prospect of irrelevance and oblivion as other media and communications fill their operating space. On the other hand, those who adopt a more holistic approach toward destination management are more likely to be successful. But to achieve this they must become orchestrators, engaged in both digital communications and product development through collaboration and networking with government, business partners and consumers.

⁴ Travel Means Jobs, US Travel Association 2012

Appendix 3

Positioning Portland for Rain, Hail or Shine

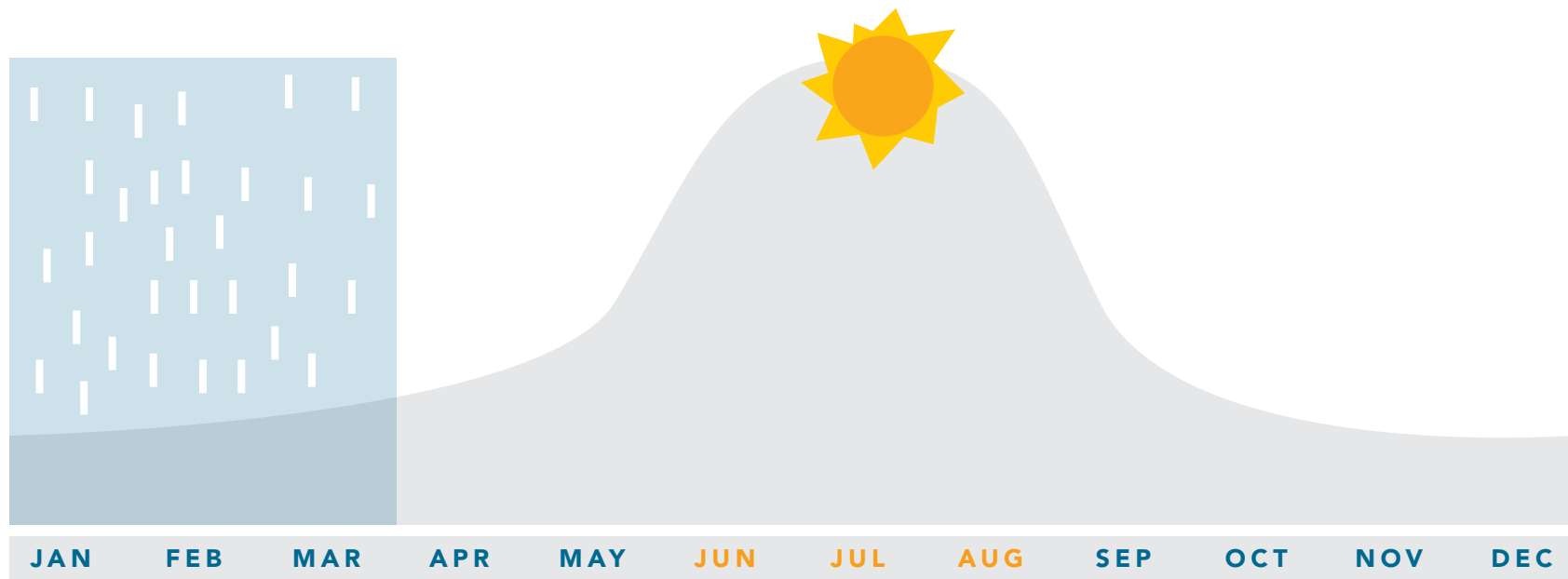
This research study was conducted by Weiden+ Kennedy for Travel Portland. It presents interesting insights into the perceptions and motivations of visitors to the Northwest during winter months.

Positioning Portland for more visits, rain or shine.

JANUARY 14, 2013

Business challenge.

Stimulate more overnight visits during the shoulder seasons, particularly January through March.



What we knew about visitors going in.

Compared to people who visit other Oregon destinations, Portland visitors...

HAVE HIGHER INCOME

Nearly twice as many visitors make \$150,000 or more.

ARE YOUNGER

18-24: 17%

25-44: 41%

45-64: 26%

65+: 16%

TEND TO BE CHILDLESS

70% of visitors report not having kids under 18 at home.

ARE ENJOYING A SOLO OR COUPLE'S TRIP

20% of visitors come alone.

40% come with a friend or partner.

ARE GOING SHOPPING

This is the top activity for a visit, far over-indexing other Oregon destinations.

ARE ENJOYING NATURE

24% combine a trip with the coast.

22% with Mt. Hood / Gorge.

15% with Willamette Valley.

ARE ON A SHORT GETAWAY

On average, people stay one to two nights in Portland.

Who we talked to.

BELIEVERS

They've been to Portland before and want to come back.

SEEKERS

They're thinking about coming to Portland.*

48 people in all | Mix of ages 21 to 60 | Diverse range of ethnicity

*Seattle Seekers were less frequent visitors to Portland.

Where we talked to them.



SEATTLE

25% of overnights



VANCOUVER, BC

12% of overnights



SAN FRANCISCO

8% of overnights

While folks in these markets are interested in traveling to Portland, it's not their first choice.

Q: What's your favorite getaway in the Northwest?



SEATTLE SAYS

- 1. Vancouver, BC**
2. Portland
3. Oregon Coast

Vancouver, BC is a sexier trip because it's international. But they say Portland is just as easy and much more affordable.



VANCOUVER, BC SAYS

- 1. Seattle**
2. Portland / Oregon Coast
3. San Francisco

Seattle is the easy drive they're familiar with for weekends and even day trips. Portland requires a bit more effort, but is far more affordable than San Francisco (which they also consider to be in the Northwest).



SAN FRANCISCO SAYS

- 1. Vancouver, BC**
2. Seattle
3. Portland

Vancouver, BC and Seattle are higher on the must-see list. That means a flight to Portland is a lower priority.

Trips to Portland are often sparked by “an excuse.”

Q: What brings you to Portland?

SAVING ON SALES TAX

“Portland partly draws me in because of the lack of sales tax; it makes the trip pay for itself almost...”

— Marc, Vancouver, BC, Believer

“I go there to buy expensive things. I think it’s really neat that there’s a big super mall with an ice rink in the middle. I just...I love it.”

— Fanshelia, Seattle, Believer

BEER FESTIVALS

“Breweries...I go to the Brewfest up in Portland. I like a good crafted beer.”

— Adam, San Francisco, Believer

CONCERTS

“I need a concert, it’s a good stop for most bands. You’re likely to find some interesting artists in Portland...”

— Michael, Vancouver, BC, Believer

Takeaway.

NORTHWEST TRAVEL

Use context to drive impulse.

We're not the top choice until there's a good excuse.

We need to tie our message to people's passions, like going shopping, hitting the food carts, grabbing a microbrew, or seeing a concert.

Takeaway.

TRAVEL IN GENERAL

Not just a convenient weekend getaway, but an experience.

Portland isn't just a city people want to see,
but a culture they want to experience.

The promise of that experience needs to shine in our work.

People's perception of Portland is quite different from their perception of competing Northwest destinations.



Free-spirited Friendly
Original
Laid Back
Down to earth
Approachable



Edgy Professional
Cold
Trendy
Hi-tech Reliable
Complacent



Trendy Energetic
Contemporary
Intellectual Straightforward
Progressive

Seattle and Vancouver, BC, have lost some magic as they've developed, while Portland manages to retain a laid-back vibe visitors find quite refreshing.

Takeaway.

PORTLAND TRAVEL

People see Portland as a far more laid-back place than where they live and play.

But it's a different kind of laid back. It's active, not passive. Visitors aren't sitting around; they're out doing.

Takeaway.

THE RAINY SEASON

Focus on Seattle and Vancouver, BC, for a winter campaign.
Talk about the things they say rain won't hold them back from.

Perceived Problem

People don't want to come to Portland in the rain

Actual Problem

People in Seattle choose Vancouver first and
people in Vancouver choose Seattle first

Appendix 4

Oregon Travel Impacts: 1991 to 2012, - Dean Runyan Associates

The purpose of the study is to document the economic significance of the travel industry in Oregon. The report describes the economic impacts of travel to and through the state and each of its 36 counties over the time period of 1991 to 2012, and includes detailed estimates of travel spending, the employment and earnings generated by this spending, and travel-generated tax receipts. A primary objective of the research is to provide reliable detailed figures that permit year-to-year comparisons at the state and county levels.

The extracts that are provided here relate to Clackamas County, Washington County and references to Wilsonville.

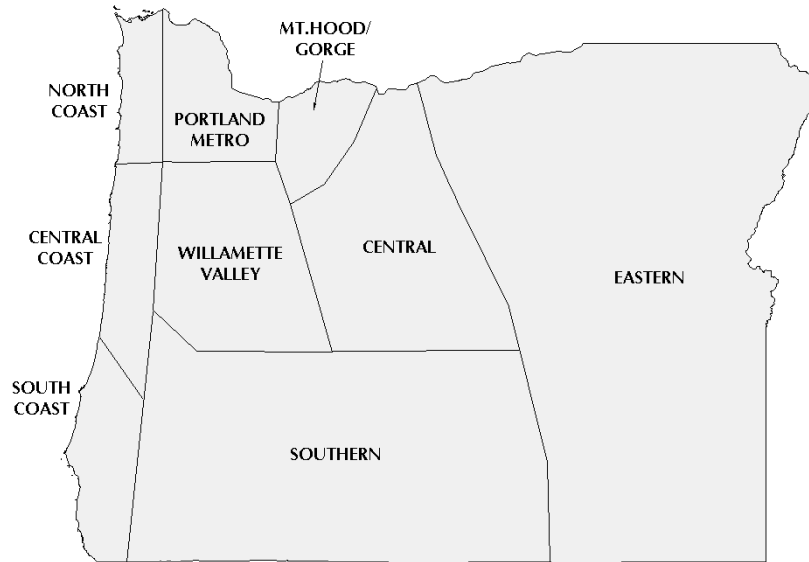
Oregon Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
Total Direct Travel Spending (\$Million)							
Destination Spending	5,543	6,025	7,129	7,661	7,521	7,931	8,213
Other Travel*	670	726	892	911	982	962	964
Total Direct Spending	6,213	6,751	8,022	8,572	8,503	8,894	9,177
Visitor Spending by Type of Traveler Accommodation (\$Million)							
Hotel, Motel	2,379	2,620	3,289	3,689	3,552	3,802	3,982
Private Home	1,199	1,305	1,499	1,635	1,675	1,738	1,777
Campground	341	367	379	422	402	414	419
Vacation Home	119	132	149	167	164	173	175
Day Travel	1,505	1,601	1,813	1,747	1,730	1,805	1,858
Destination Spending	5,543	6,025	7,129	7,661	7,521	7,931	8,213
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	963	1,043	1,307	1,431	1,358	1,438	1,510
Food Service	1,289	1,381	1,590	1,697	1,767	1,829	1,928
Food Stores	456	493	525	574	566	594	613
Local Tran. & Gas	703	922	1,260	1,536	1,332	1,566	1,591
Arts, Ent. & Rec.	796	825	899	886	872	881	906
Retail Sales	910	896	968	935	952	973	1,001
Visitor Air Tran.	425	465	581	602	675	648	665
Destination Spending	5,543	6,025	7,129	7,661	7,521	7,931	8,213
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	898	961	1,134	1,252	1,219	1,246	1,349
Arts, Ent. & Rec.	235	238	265	301	279	285	295
Retail**	177	193	208	217	214	216	225
Ground Tran.	40	43	48	52	49	51	54
Visitor Air Tran.	94	82	92	93	99	106	110
Other Travel*	181	164	178	180	166	179	182
Total Direct Earnings	1,625	1,682	1,925	2,095	2,025	2,083	2,215
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	51.0	51.3	55.8	58.6	55.2	56.3	57.5
Arts, Ent. & Rec.	16.6	16.3	17.1	18.4	16.9	17.2	17.4
Retail**	9.1	9.5	9.9	9.9	9.5	9.5	9.6
Ground Tran.	1.8	1.8	1.8	1.9	1.7	1.8	1.8
Visitor Air Tran.	2.2	1.9	1.9	2.0	1.7	1.7	1.7
Other Travel*	4.8	4.1	4.0	4.1	3.1	3.1	3.1
Total Direct Employment	85.4	84.9	90.5	94.8	88.0	89.6	91.1
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	76	82	102	112	109	120	127
State Tax Receipts	147	163	187	200	193	230	236
Federal Tax Receipts	345	365	416	450	446	422	442
Total Direct Tax Receipts	569	610	705	762	748	772	805

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and travel agencies. **Retail includes gasoline.

III. REGIONAL TRAVEL IMPACTS



North Coast Clatsop Tillamook	Willamette Valley Benton Clackamas (South) Lane (East) Linn Marion Polk Yamhill	Southern Douglas (East) Jackson Josephine Klamath Lake Central Crook Deschutes Jefferson Wasco (South)	Eastern Baker Gilliam Grant Harney Malheur Morrow Sherman Umatilla Union Wallowa Wheeler
Central Coast Douglas (West) Lincoln Lane (West)	Portland Metro Clackamas (West) Columbia Multnomah (West) Washington	Mt. Hood/Gorge Clackamas (East) Multnomah (East) Hood River Wasco (North)	
South Coast Coos Curry			

2012p Regional Travel Impacts

	Spending (\$Million)		Earnings		Tax Revenue (\$Million)		
	All Travel	Destination	(\$Million)	Employment	Local	State	Total
Willamette Valley	1,535	1,379	367	18.3	13	47	60
North Coast	628	622	180	7.0	8	16	24
Central Coast	597	590	164	7.7	10	16	25
South Coast	352	342	98	4.7	2	10	11
Oregon Coast	1,576	1,573	444	19.5	20	41	61
Portland	3,856	2,910	846	27.0	69	85	154
Southern	916	831	221	10.1	10	26	36
Central	650	602	165	7.5	8	18	26
Eastern	333	317	92	5.0	3	10	14
Mt. Hood/Gorge	309	299	82	3.9	4	9	12

Note: The sum of destination spending for the regions will be less than statewide destination spending because of the treatment of transportation expenditures (only a portion of ground transportation is allocated to destination spending).

2012p Regional Overnight Visitor Volume

	Nights (Millions)		Trips (Millions)	
	Persons	Parties	Persons	Parties
Willamette Valley	18.2	7.1	6.0	2.3
North Coast	5.6	2.0	2.1	0.8
Central Coast	5.5	2.0	1.9	0.7
South Coast	3.8	1.4	1.3	0.5
Oregon Coast	15.0	5.4	5.2	1.9
Portland	23.0	11.2	7.4	3.5
Southern	11.0	4.2	3.6	1.4
Central	7.7	2.8	2.6	1.0
Eastern	4.8	1.8	1.8	0.7
Mt. Hood/Gorge	3.0	1.2	1.0	0.4

Note: The sum of trips for the regions will be greater than the statewide trip count because some travelers visit multiple destinations on a single trip within the state.

WILLAMETTE VALLEY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$76,870
Employee Earnings generated by \$100 Visitor Spending	\$26
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.30

Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$77,802
Additional employment if each resident household encouraged one additional overnight visitor	1,010

Visitor Shares

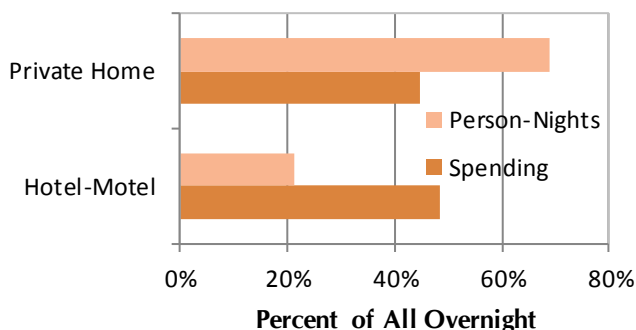
Travel Share of Total Employment (2011)*	3.1%
Overnight Visitor Day Share of Resident Population (2012p)**	4.5%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Overnight Visitor Day Share equals Overnight Days/(Population*365).

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging usually have the greatest overall economic impact. Population density, visitor attractions and the amount of business travel are some of the primary determinants of overnight travel.

Overnight Visitor Spending and Volume



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,834	3,892	\$482
Private Home	3,699	12,540	\$445
Other Overnight	474	1,776	\$67
All Overnight	6,007	18,208	\$993

Willamette Valley Travel Trends, 1991-2012p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Millions)		
				Local	State	Total
1991	631	151	13,580	3.4	18.8	22.2
1992	672	159	13,440	3.8	20.7	24.4
1993	719	169	13,770	5.0	22.1	27.2
1994	743	176	13,930	5.6	23.2	28.8
1995	783	188	14,210	6.0	24.2	30.2
1996	829	200	14,520	6.4	24.6	31.0
1997	874	214	14,660	6.7	25.4	32.1
1998	910	230	15,680	6.8	26.3	33.1
1999	950	238	15,260	7.3	26.9	34.2
2000	1,006	247	15,700	7.9	28.3	36.2
2001	1,016	251	15,950	8.0	28.5	36.5
2002	1,061	267	16,560	8.4	29.1	37.5
2003	1,093	269	16,340	8.3	29.8	38.1
2004	1,165	280	16,660	9.0	32.1	41.1
2005	1,267	300	17,340	10.2	34.2	44.4
2006	1,355	317	17,770	11.3	36.2	47.5
2007	1,385	337	18,340	12.2	37.6	49.8
2008	1,453	349	18,590	12.5	38.8	51.3
2009	1,346	328	17,210	11.4	35.9	47.3
2010	1,447	332	17,160	11.4	37.2	48.6
2011	1,509	343	17,760	12.1	46.0	58.1
2012p	1,535	367	18,270	12.6	47.0	59.6
Annual Percentage Change						
11-12p	1.8	6.9	2.9	4.6	2.1	2.6
91-12p	4.3	4.3	1.4	6.5	4.5	4.8

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

Willamette Valley Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
Total Direct Travel Spending (\$Million)							
Destination Spending	979	1,057	1,215	1,296	1,284	1,344	1,379
Other Travel*	82	108	140	156	163	165	156
Total Direct Spending	1,061	1,165	1,355	1,453	1,447	1,509	1,535
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	122	132	165	183	171	181	188
Food Service	241	257	289	306	319	330	346
Food Stores	101	108	113	127	127	133	137
Local Tran. & Gas	112	150	205	251	214	253	256
Arts, Ent. & Rec.	210	216	234	228	228	228	234
Retail Sales	173	169	178	173	177	181	185
Visitor Air Tran.	20	26	30	28	49	38	33
Destination Spending	979	1,057	1,215	1,296	1,284	1,344	1,379
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	149.3	159.1	184.0	204.0	198.1	206.0	221.3
Arts, Ent. & Rec.	65.2	66.0	72.7	81.8	76.9	79.7	85.6
Retail**	34.3	36.9	39.2	41.4	41.1	41.5	43.2
Ground Tran.	5.2	5.5	6.1	6.5	6.0	6.3	6.5
Visitor Air Tran.	1.2	1.5	2.2	1.6	1.3	1.3	1.4
Other Travel*	11.5	11.5	13.2	13.3	8.5	8.6	9.0
Total Direct Earnings	266.6	280.5	317.4	348.6	331.9	343.4	367.1
Industry Employment Generated by Travel Spending (Thousand Jobs)							
Accom. & Food Serv.	9.3	9.4	10.1	10.5	9.8	10.2	10.4
Arts, Ent. & Rec.	4.7	4.5	4.9	5.3	4.9	5.1	5.3
Retail**	1.8	1.9	1.9	2.0	1.9	1.9	1.9
Ground Tran.	0.2	0.2	0.2	0.2	0.2	0.2	0.2
Visitor Air Tran.	0.0	0.1	0.1	0.1	0.0	0.0	0.0
Other Travel*	0.5	0.5	0.5	0.5	0.3	0.3	0.3
Total Direct Employment	16.6	16.7	17.8	18.6	17.2	17.8	18.3
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	8.4	9.0	11.3	12.5	11.4	12.1	12.6
State Tax Receipts	29.1	32.1	36.2	38.8	37.2	46.0	47.0
Total Local & State	37.5	41.1	47.5	51.3	48.6	58.1	59.6

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, and travel agencies. **Retail includes gasoline.

Willamette Valley Visitor Volume and Visitor Spending

Direct Visitor Spending by Type of Traveler Accommodation (\$Million)

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	658	718	837	934	919	968	993
Hotel, Motel	298	331	410	458	433	465	482
Private Home	309	336	374	410	421	438	445
Other Overnight	51	51	53	67	64	66	67
Campground	43	42	42	54	51	52	53
Vacation Home	9	10	11	13	13	14	14
Day Travel	322	340	378	362	365	375	386
Spending at Destination	979	1,057	1,215	1,296	1,284	1,344	1,379

Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$298	\$636	\$124	\$263	2.4	2.1
Private Home	\$90	\$307	\$35	\$120	2.5	3.4
Other Overnight	\$127	\$475	\$37	\$141	3.4	3.8
All Overnight	\$140	\$424	\$55	\$165	2.6	3.0

Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	3,647	3,766	3,892	1,518	1,567	1,621
Private Home	12,404	12,444	12,540	4,894	4,908	4,952
Other Overnight	1,813	1,776	1,776	536	526	526
All Overnight	17,865	17,987	18,208	6,948	7,001	7,098

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	1,717	1,774	1,834	709	733	758
Private Home	3,658	3,670	3,699	1,430	1,434	1,446
Other Overnight	484	474	474	143	140	140
All Overnight	5,858	5,918	6,007	2,282	2,307	2,344

NORTH COAST TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$88,760
Employee Earnings generated by \$100 Visitor Spending	\$29
Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.90

Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$4,904
Additional employment if each resident household encouraged one additional overnight visitor	60

Visitor Shares

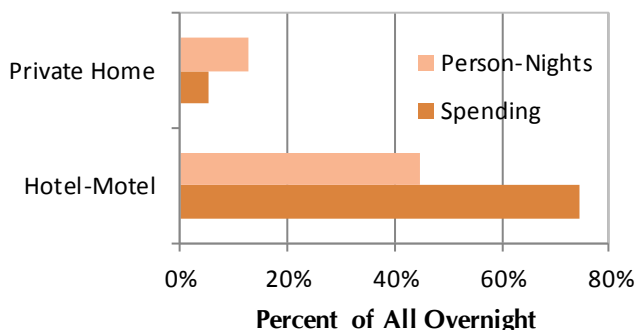
Travel Share of Total Employment (2011)*	19.1%
Overnight Visitor Day Share of Resident Population (2012p)**	24.6%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Overnight Visitor Day Share equals Overnight Days/(Population*365).

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging usually have the greatest overall economic impact. Population density, visitor attractions and the amount of business travel are some of the primary determinants of overnight travel.

Overnight Visitor Spending and Volume



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	1,174	2,520	\$288
Private Home	217	730	\$20
Other Overnight	673	2,399	\$79
All Overnight	2,065	5,649	\$387

CLACKAMAS COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$82,590
Employee Earnings generated by \$100 Visitor Spending	\$30
Local & State Tax Revenues generated by \$100 Visitor Spending	\$4.30

Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$14,080
Additional employment if each resident household encouraged one additional overnight visitor	170

Visitor Shares

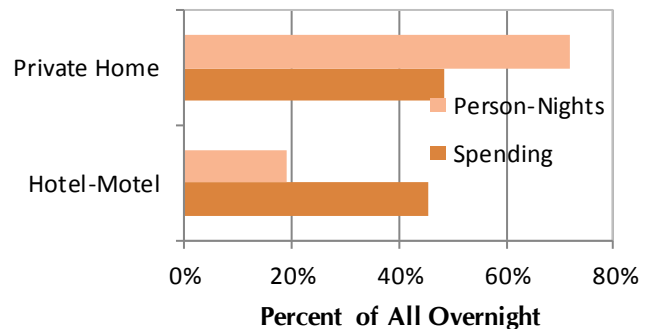
Travel Share of Total Employment (2011)*	2.4%
Overnight Visitor Day Share of Resident Population (2012p)**	6.5%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	640	1,269	\$139.6
Private Home	1,540	4,749	\$149.2
Other Overnight	176	583	\$19.1
All Overnight	2,356	6,601	\$307.9

Clackamas County Travel Trends, 1991-2012p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	202.9	51.3	4,040	672	6,111	6,783
1992	222.5	56.4	4,190	744	6,851	7,595
1993	240.9	61.5	4,420	959	7,427	8,386
1994	245.4	62.6	4,340	1,176	7,627	8,803
1995	259.1	66.3	4,420	1,283	7,872	9,156
1996	271.1	69.2	4,480	1,553	7,974	9,527
1997	289.4	74.6	4,580	1,746	8,293	10,040
1998	285.6	75.3	4,500	1,767	8,228	9,995
1999	303.1	79.3	4,570	1,850	8,539	10,389
2000	326.3	83.8	4,730	2,110	9,021	11,131
2001	328.9	84.4	4,740	2,032	9,022	11,054
2002	330.4	84.6	4,720	2,102	8,896	10,998
2003	337.5	86.4	4,650	2,039	9,134	11,172
2004	360.6	91.2	4,850	2,168	9,973	12,141
2005	389.1	96.9	4,970	2,869	10,547	13,416
2006	424.3	105.1	5,180	3,247	11,347	14,593
2007	441.3	113.5	5,400	3,649	11,907	15,556
2008	460.6	117.4	5,500	3,770	12,211	15,981
2009	408.1	108.7	5,100	3,103	11,140	14,243
2010	431.3	108.5	4,980	3,206	11,373	14,579
2011	455.8	112.4	5,140	3,665	13,793	17,458
2012p	470.9	120.0	5,230	3,977	14,079	18,056
Annual Percentage Change						
11-12p	3.3%	6.8%	1.6%	8.5%	2.1%	3.4%
91-12p	4.1%	4.1%	1.2%	8.8%	4.1%	4.8%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

Clackamas County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
Total Direct Travel Spending (\$Million)							
Destination Spending	306.3	325.1	377.0	403.4	387.0	404.2	419.9
Other Travel*	24.2	35.5	47.3	57.2	44.3	51.6	51.0
Total Direct Spending	330.4	360.6	424.3	460.6	431.3	455.8	470.9
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	43.0	44.8	58.4	65.9	56.7	61.6	67.1
Food Service	88.9	95.2	109.7	117.5	119.6	122.6	128.6
Food Stores	23.7	26.3	28.2	32.3	31.4	32.7	33.3
Local Tran. & Gas	28.0	35.1	46.6	55.9	49.0	55.9	56.8
Arts, Ent. & Rec.	41.3	43.1	47.0	47.4	45.7	46.0	47.1
Retail Sales	81.4	80.5	87.1	84.4	84.7	85.4	87.0
Destination Spending	306.3	325.1	377.0	403.4	387.0	404.2	419.9
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	54.1	57.3	68.1	76.5	71.7	75.3	80.6
Arts, Ent. & Rec.	12.4	12.7	14.2	16.5	14.9	15.2	16.7
Retail**	11.9	12.8	13.9	14.6	14.1	14.1	14.6
Ground Tran.	3.3	3.5	4.0	4.2	4.1	4.2	4.3
Other Travel*	2.9	4.8	5.1	5.6	3.6	3.6	3.8
Total Direct Earnings	84.6	91.2	105.1	117.4	108.5	112.4	120.0
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	2,970	2,960	3,240	3,440	3,120	3,270	3,320
Arts, Ent. & Rec.	950	1,020	1,010	1,120	1,020	1,030	1,060
Retail**	520	530	580	600	560	560	560
Ground Tran.	140	140	150	140	140	140	140
Other Travel*	140	200	210	200	150	140	140
Total Direct Employment	4,720	4,850	5,180	5,500	4,980	5,140	5,230
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	2.1	2.2	3.2	3.8	3.2	3.7	4.0
State Tax Receipts	8.9	10.0	11.3	12.2	11.4	13.8	14.1
Total Local & State	11.0	12.1	14.6	16.0	14.6	17.5	18.1

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, and travel agencies. **Retail includes gasoline.

Clackamas County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	221.8	237.0	279.2	308.6	292.7	307.9	321.3
Hotel, Motel	97.5	101.9	130.2	145.1	128.6	139.6	151.6
Private Home	111.3	120.1	132.7	142.8	145.5	149.2	150.3
Other Overnight	13.0	15.1	16.3	20.6	18.5	19.1	19.4
Campground	7.7	9.5	10.2	13.9	11.8	12.2	12.3
Vacation Home	5.2	5.6	6.1	6.7	6.8	7.0	7.1
Day Travel	84.5	88.1	97.8	94.8	94.4	96.3	98.6
Spending at Destination	306.3	325.1	377.0	403.4	387.0	404.2	419.9

Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$237	\$483	\$110	\$218	2.2	2.0
Private Home	\$66	\$209	\$31	\$97	2.1	3.2
Other Overnight	\$106	\$354	\$33	\$109	3.2	3.3
All Overnight	\$102	\$292	\$47	\$131	2.2	2.9

Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	1,151	1,198	1,269	537	555	590
Private Home	4,873	4,805	4,749	2,305	2,273	2,255
Other Overnight	588	583	583	182	180	180
All Overnight	6,613	6,585	6,601	3,024	3,008	3,025

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	580	603	640	262	272	289
Private Home	1,581	1,559	1,540	730	720	713
Other Overnight	178	176	176	55	54	54
All Overnight	2,338	2,338	2,356	1,047	1,046	1,056

WASHINGTON COUNTY TRAVEL IMPACTS AND VISITOR VOLUME

Travel Indicators

Visitor Spending Impacts (2012p)

Amount of Visitor Spending that supports 1 Job	\$88,560
Employee Earnings generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues generated by \$100 Visitor Spending	\$5.60

Visitor Volume (2012p)

Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$28,795
Additional employment if each resident household encouraged one additional overnight visitor	325

Visitor Shares

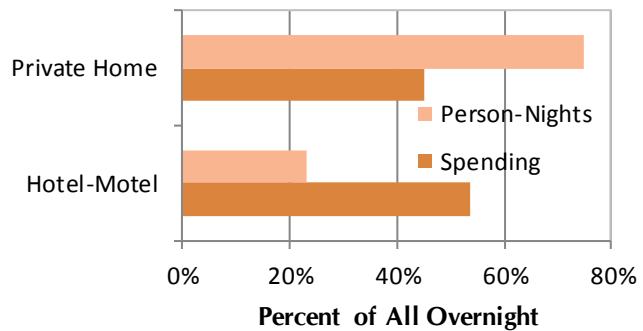
Travel Share of Total Employment (2011)*	2.0%
Overnight Visitor Day Share of Resident Population (2012p)**	3.7%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitors who stay in private homes typically comprise the largest share of overnight visitor volume. Visitors who stay overnight in commercial lodging typically have the greatest economic impact. There is substantial variation among destinations, however. Most rural and suburban areas have high shares of private home visitation. Urban areas tend to have greater shares of hotel/motel stays.

Overnight Visitor Spending and Volume



2012p	Person Trips (Thousands)	Person Nights (Thousands)	Visitor Spending (Millions)
Hotel, Motel	807	1,647	\$196.4
Private Home	1,731	5,370	\$164.3
Other Overnight	43	150	\$4.8
All Overnight	2,582	7,166	\$365.5

Washington County Travel Trends, 1991-2012p

	Spending (\$Millions)	Earnings (\$Millions)	Employment	Tax Receipts (\$Thousands)		
				Local	State	Total
1991	209.0	55.3	3,920	2,008	6,642	8,649
1992	224.7	59.1	3,930	2,208	7,384	9,592
1993	240.2	63.3	4,080	2,385	7,995	10,380
1994	257.6	68.1	4,210	2,619	8,586	11,205
1995	284.9	75.9	4,520	3,084	9,238	12,322
1996	308.2	82.0	4,750	3,489	9,636	13,125
1997	320.4	85.9	4,740	3,712	9,880	13,592
1998	319.9	87.9	4,770	3,724	9,981	13,706
1999	342.5	93.1	4,830	3,839	10,481	14,320
2000	385.9	101.7	5,210	4,288	11,683	15,971
2001	381.3	99.9	5,130	3,790	11,649	15,439
2002	375.0	98.3	4,950	3,540	11,421	14,961
2003	404.6	105.9	5,190	3,709	12,203	15,912
2004	421.7	108.4	5,100	3,759	13,064	16,823
2005	461.7	115.8	5,340	4,143	13,958	18,101
2006	506.9	125.2	5,550	4,876	15,086	19,962
2007	530.4	134.5	5,800	6,845	15,772	22,617
2008	558.0	139.5	5,950	6,793	16,262	23,055
2009	482.2	127.6	5,480	5,684	14,790	20,473
2010	538.4	134.5	5,640	6,120	15,792	21,912
2011	602.3	139.4	5,830	7,691	19,861	27,552
2012p	598.2	147.9	5,900	7,333	19,908	27,241
Annual Percentage Change						
11-12p	-0.7%	6.1%	1.1%	-4.7%	0.2%	-1.1%
91-12p	5.1%	4.8%	2.0%	6.4%	5.4%	5.6%

Notes: Spending includes visitor spending and other travel spending (travel agencies and transportation to other Oregon destinations). Earnings include wage and salary disbursements, benefits and proprietor income. Employment includes full- and part-time payroll employees and proprietors. These direct travel impacts do not include secondary (indirect and induced) impacts. The multiple year percentage change refers to the average annual change.

Washington County Travel Impacts, 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
Total Direct Travel Spending (\$Million)							
Destination Spending	328.7	355.5	417.2	446.7	444.2	492.4	487.6
Other Travel*	46.3	66.2	89.7	111.3	94.1	109.9	110.5
Total Direct Spending	375.0	421.7	506.9	558.0	538.4	602.3	598.2
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	51.8	55.5	70.9	80.9	70.4	86.3	86.6
Food Service	99.9	108.8	126.5	135.1	143.3	154.6	154.8
Food Stores	26.1	29.0	31.9	35.1	35.9	38.4	38.0
Local Tran. & Gas	34.8	43.6	57.2	67.0	62.3	74.1	71.9
Arts, Ent. & Rec.	42.9	45.4	50.1	49.9	50.3	52.7	51.8
Retail Sales	73.1	73.3	80.6	78.8	82.1	86.3	84.6
Destination Spending	328.7	355.5	417.2	446.7	444.2	492.4	487.6
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	61.2	66.2	78.8	88.2	85.4	87.1	94.8
Arts, Ent. & Rec.	12.3	12.7	14.3	16.4	15.6	17.3	17.5
Retail**	11.3	12.4	13.7	14.3	14.5	15.0	15.0
Ground Tran.	4.8	5.2	5.9	6.3	6.2	6.8	6.7
Other Travel*	8.7	11.9	12.4	14.2	12.8	13.2	13.9
Total Direct Earnings	98.3	108.4	125.2	139.5	134.5	139.4	147.9
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	3,180	3,240	3,570	3,820	3,600	3,670	3,780
Arts, Ent. & Rec.	760	750	800	890	880	970	970
Retail**	470	490	540	550	550	570	540
Ground Tran.	210	210	220	220	210	230	220
Other Travel*	340	400	410	460	410	400	390
Total Direct Employment	4,950	5,100	5,550	5,950	5,640	5,830	5,900
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	3.5	3.8	4.9	6.8	6.1	7.7	7.3
State Tax Receipts	11.4	13.1	15.1	16.3	15.8	19.9	19.9
Total Local & State	15.0	16.8	20.0	23.1	21.9	27.6	27.2

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and ground transportation impacts for travel to other Oregon visitor destinations, and travel agencies. **Retail includes gasoline.

Washington County Visitor Spending and Visitor Volume

Visitor Spending by Type of Traveler Accommodation (\$Million), 2002-2012p

	2002	2004	2006	2008	2010	2011	2012p
All Overnight	235.8	255.7	303.6	334.0	327.6	368.6	365.5
Hotel, Motel	118.6	128.1	158.5	176.6	161.9	197.1	196.4
Private Home	113.5	123.8	140.9	152.8	161.1	166.7	164.3
Other Overnight	3.6	3.9	4.1	4.6	4.6	4.8	4.8
Campground	2.0	2.1	2.2	2.5	2.4	2.5	2.5
Vacation Home	1.6	1.8	1.9	2.2	2.2	2.3	2.3
Day Travel	93.0	99.8	113.6	112.7	116.6	123.7	122.2
Spending at Destination	328.7	355.5	417.2	446.7	444.2	492.4	487.6

Average Expenditures for Overnight Visitors, 2012p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel	\$255	\$531	\$119	\$243	2.1	2.1
Private Home	\$61	\$193	\$31	\$95	2.0	3.2
Other Overnight	\$92	\$319	\$32	\$111	2.8	3.5
All Overnight	\$104	\$296	\$51	\$142	2.0	2.8

Overnight Visitor Volume, 2010-2012p

	Person-Nights (000)			Party-Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	1,450	1,696	1,647	681	791	771
Private Home	5,590	5,567	5,370	2,780	2,769	2,686
Other Overnight	151	150	150	53	53	53
All Overnight	7,191	7,412	7,166	3,513	3,613	3,510

	Person-Trips (000)			Party-Trips (000)		
	2010	2011	2012	2010	2011	2012
Hotel, Motel	711	831	807	326	380	370
Private Home	1,802	1,795	1,731	880	877	849
Other Overnight	44	43	43	15	15	15
All Overnight	2,557	2,669	2,582	1,222	1,272	1,234

INTERPRETATION OF IMPACT ESTIMATES

Users of this report should be aware of several issues regarding the interpretation of the impact estimates contained herein:

- The estimates contained in this report are based on the most current data available and supersede all previous estimates of travel impacts.
- The estimates in this report are expressed in *current* dollars unless otherwise noted.
- The employment estimates in this report are estimates of the total number of full and part-time jobs directly generated by travel spending, rather than the number of individuals employed. Both payroll and self-employment are included in these estimates. Caution should therefore be used in comparing these estimates with other employment data series.
- In general, estimates of small geographic areas (e.g., rural counties) are less reliable than estimates for regions or metropolitan counties. Trend analysis and comparisons of counties with relatively low levels of travel related economic activity should therefore be interpreted cautiously.
- The estimates of travel impacts published in this report will necessarily differ somewhat from estimates generated from different models, methodologies and data sources. Nonetheless, it should be emphasized that all credible estimates of direct travel impacts at the state level, including those of Dean Runyan Associates, are of similar magnitude.

REGIONAL TRAVEL IMPACT MODEL

PRIMARY DATA SOURCES

Room Demand,
Visitor Surveys,
Population,
Inventory/Use
of Campsites &
Second Homes,
Visitor air
arrivals



Visitor Volume
(Travel Party Days by
Type of
Accommodation)



ECONOMIC IMPACTS OF TRAVEL

Accommodation
Sales,
Visitor Surveys,
Airfares



Visitor Spending
(Type of
Accommodation and
Type of Commodity)



Point of Sale Taxes
(Sales and Excise Taxes
associated with Visitor
Spending)



Business Receipts
(not reported)



Business Taxes
(Taxes on business
income or receipts)

*Note: Receipts equals
Spending less
POS Taxes*



Ratio of
Earnings to
Receipts for
relevant
Industry



Earnings
(By Industry)



Personal Taxes
(Local, state and
federal income and
payroll taxes)



Average
Annual
Earnings per
job for
relevant
industry



Employment
(By Industry)

*Note: Most estimates of taxes
are based on implicit tax rates
applied to visitor spending,
business receipts, and
employee earnings. Lodging
tax receipts reflect actual tax
collections.*

Appendix 5

Oregon Bicycle Travel Study

This research study was conducted by Dean Runyon Associates for Travel Oregon. Relevant extracts from the preliminary 2012 release of the data are provided, covering key areas such as - purpose of trip, origins of travelers, expenditures, types of accommodation, number of nights and types of cycling trips.

Bicycle Travel/Bike Tourism

“Bicycle touring generally means self-contained cycling trips over long distances, which prioritize pleasure, adventure and autonomy rather than sport, commuting or exercise. Touring can range from single day rides to multi-day trips. Tours may be planned and organized by the participant/s for themselves or organized for a group by a professional holiday business, a club, or a charity as a fund-raising venture.” Source: Wikipedia

The following is a key set of cycling sub-categories identified by Travel Oregon’s Bicycle Travel Study of 2012.

Bicycle Activity Trip Types

- Organized non-competitive group ride
- Sanctioned bicycle Race (road/cyclocross/mountain)
- Organized group tour (road/mountain)
- Independent bicycle touring (road/off-road)
- Day road ride
- Day mountain bike ride
- As a recreational activity while on trip (e.g. riding around Portland waterfront, resort, bike trail)

Source: The Economic Significance of Bicycle-Related Travel in Oregon: 2012, Dean Runyan Associates

Cautionary Note: There appears to be no simple way to define bicycle tourism because of the variables involved. All of which can impact demographic, economic and spending calculations.

Market:

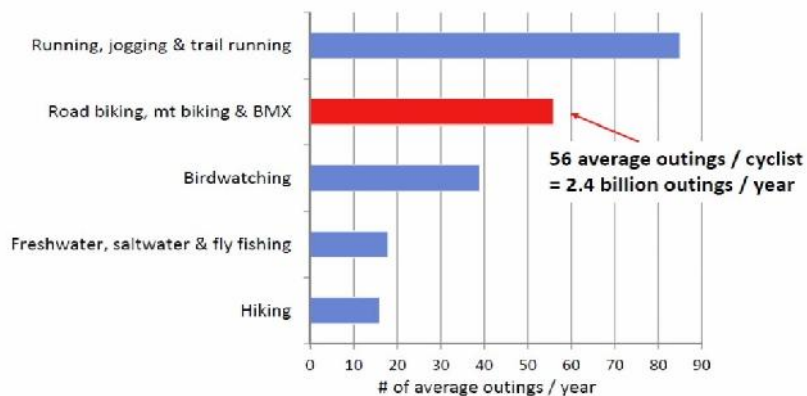
The following information is based on Travel Oregon's Oregon Bicycle Travel Survey, conducted by Dean Runyan Associates in 2012. The study is based on an online survey filled out by over 5,000 people. This report contains the most relevant extracts only.

Where does cycling rate in terms of top outdoor recreation



activities?

Outdoor Recreation Activities by Frequency of Participation



Source: Outdoor Recreation Participation Report, Outdoor Industry Foundation, 2012

Cycling Americans

- Over a quarter of all Americans cycle
- For every car sold, three bikes are sold.
- More Americans cycle than golf, ski or play tennis combined.

Source: Outdoor Recreation Participation Report 2011/National Bike Dealer's Association 2010 Report)

Oregon Context

- 17.4 million people visited Oregon
- 4.5 million visitors road a bike while in Oregon
- 1.5 million planned on riding before they came.

Source: 2011 Travel Horizons Study, Oregon

Bicycle Travelers - Who are they?

(Note: Cycling can be a primary reason for trip or one of several reasons for trip)

- 65% are men
- 46% are 35-54
- 26% are 55-64
- 78% have a Bachelors or Master degree
- 58% have household income above \$75k
- 9% have household income above \$200k

Oregon Bicycle Travelers – Where are they from?

- 67% Oregon
- 10% Washington
- 8% California
- 1% Idaho
- 14% Other US States

Oregon Bicycle Travelers – All reasons for a trip

Purpose of Trip	Total	Overnight	Day
Primary reason for trip	51.7%	45.8%	72.9%
One of several reasons for this trip	26.5%	29.6%	15.3%
A casual activity while on this trip	21.8%	24.6%	11.8%
Total	100.0%	100.0%	100.0%

Type(s) of Accommodation	Total	Overnight	Day
Commercial Lodging	70.6%	70.6%	0.0%
Campgrounds/RV Park	43.0%	43.0%	0.0%
Friends/Relatives	18.9%	18.9%	0.0%
Second Home	3.4%	3.4%	0.0%
Other (event accommodations, etc)	7.4%	7.4%	0.0%
Total*	143.2%	143.2%	0.0%

Number of Nights	Total	Overnight	Day
1 Night	16.0%	16.0%	NA
2 Nights	24.3%	24.3%	NA
3-4 Nights	27.1%	27.1%	NA
5-6 Nights	12.2%	12.2%	NA
7+ Nights	20.4%	20.4%	NA
Total	100.0%	100.0%	NA

Type of Bicycle(s)	Total	Overnight	Day
Road bike	50.3%	46.6%	64.8%
Mountain bike, cross-country	33.0%	34.7%	26.1%
Hybrid/cross bike	21.4%	21.8%	19.9%
Touring bike	15.5%	16.1%	13.1%
City bike	12.7%	13.2%	10.8%
Cruiser bike	6.9%	7.4%	4.7%
Mountain bike, downhill	6.6%	7.3%	3.8%
Tandem	4.3%	4.7%	2.5%
Recumbent	3.7%	3.9%	3.2%
Track bike	1.0%	0.9%	1.3%
Other	6.1%	6.3%	5.1%
Total*	161.5%	163.0%	155.3%

Bicycle riders – Who are they – Other activities

Depending on the type of bicycle activity trip involved, other activities besides bicycling (during the year) included -

- Hiking
- Exploring the town
- Eating at an establishment/Dining out
- Visiting a farmers market
- Visiting a microbrewery
- Sightseeing by car
- Backpacking
- Wildlife watching

How did they learn about cycling?

For most cycling activity types surveyed, the leading ways were frequently –

- Internet search
- From friend/relative who lives in Oregon
- Other Cycling website
- Cycling Magazine Article
- RideOregonRide.com
- TravelOregon.com or Social Media Website

Types of Accommodation

- Commercial lodging and Campground/RV Park scored highest percentage points (and above Friends/Relatives and other options) for Overnight bicycle travelers.

Party-Trips by Type (2012)

Note: Average party size (adults + children) is 3.4 people (overnight trips) and 2.7 people (day trips)

- 422,000 (37%) – Day road ride
- 351,000 (31%) – As a recreational activity
- 106,000 (6%) – Organized non-competitive group ride
- 91,000 (8%) – Sanctioned bicycle race
- 80,000 (7%) – Day mountain bike ride
- 51,000 (4%) – Independent bicycle touring
- 39,000 (3%) – Organized group tour
- 10,000 (1%) – Other cycling event

Party-Trips by Region (2012)

(Note: The designated travel region Wilsonville lies within in Oregon is the Willamette Valley.)

- Portland Metro – 60,000 Overnight/227,000 Day
- **Willamette Valley** – 78,000 Overnight/201,000 Day
- Gorge/Mt Hood – 41,000 Overnight/146,000 Day
- Central – 93,000 Overnight/54,000 Day
- Coast – 66,000 Overnight/65,000 Day
- Southern – 44,000 Overnight/51,000 Day
- Eastern – 20,000 Overnight/5,000 Day

Total Trip Expenditures by Region (2012)

- Portland Metro - \$56 million Overnight/\$33 million Day
- **Willamette Valley** - \$57 million Overnight/\$22 million Day
- Gorge/Mt Hood - \$30 million Overnight/\$16 million Day
- Central - \$70 million Overnight/\$6 million Day
- Coast - \$49 million Overnight/\$8 million Day
- Southern - \$33 million Overnight/\$6 million Day
- Eastern - \$15 million Overnight/\$1 million Day

Oregon Bicycle Related Travel Expenditures by Travel Region 2012 (in thousands of dollars):

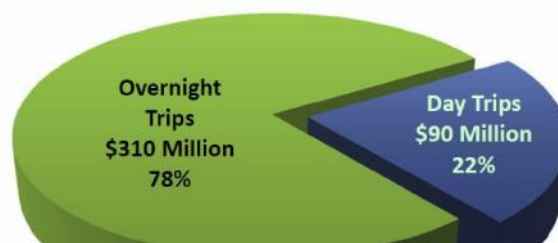
Willamette Valley	Overnight	Day	Total
Accommodations	\$15,197	-	\$15,197
Restaurants/Bars/Lounges	\$12,624	\$7,063	\$19,686
Groceries/snacks	\$7,547	\$2,544	\$10,091
Fuel/Gas/Transportation/Parking	\$9,121	\$4,716	\$13,837
Bicycle related repairs/clothing/gear	\$3,511	\$2,396	\$5,906
Bicycle Event Fees	\$3,729	\$4,050	\$7,779
Recreation and Entertainment	\$1,395	\$256	\$1,650
All other retail	\$2,861	\$742	\$3,603
Airfare (if applicable)	\$729	-	\$729
Total	\$56,713	\$21,766	\$78,480

Gorge/Mt.Hood	Overnight	Day	Total
Accommodations	\$8,249	-	\$8,249
Restaurants/Bars/Lounges	\$6,797	\$5,333	\$12,129
Groceries/snacks	\$4,158	\$1,625	\$5,784
Fuel/Gas/Transportation/Parking	\$5,105	\$2,907	\$8,012
Bicycle related repairs/clothing/gear	\$1,889	\$1,882	\$3,771
Bicycle Event Fees	\$1,772	\$3,063	\$4,835
Recreation and Entertainment	\$795	\$191	\$986
All other retail	\$1,563	\$520	\$2,083
Airfare (if applicable)	\$0	-	\$0
Total	\$30,329	\$15,520	\$45,849

For Oregon Bicycle Travel:

RIDE OREGON Spending – Day vs. Overnight

overnight = 3 x the impact



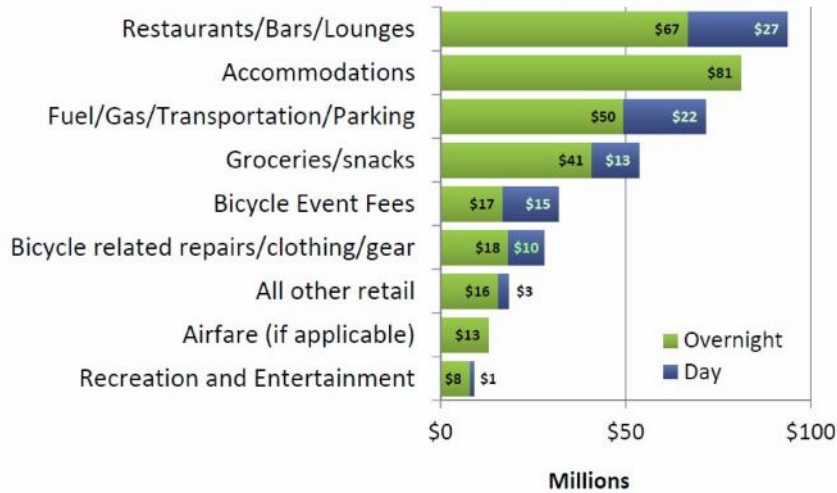
RIDE OREGON Average Trip Expenditures (by Party)

Type of Bicycle Activity	Overnight Trips		Day Trips
	Average Trip Cost	Average Trip Length (Nights)	Average Trip Cost
Organized group tour	\$900	4.53	\$109
As a recreational activity	\$844	3.73	\$131
Sanctioned bicycle race	\$794	2.56	\$144
Independent bicycle touring	\$788	4.83	\$144
Day mountain bike ride	\$732	3.36	\$125
Organized non-competitive group ride	\$697	3.98	\$168
Day road ride	\$606	2.75	\$98
Other cycling event	\$552	2.65	\$158
Overall	\$744	3.59	\$116

Note: average expenditures by party; average party size (adults + children) is 3.4 people (overnight trips) and 2.7 people (day trips)



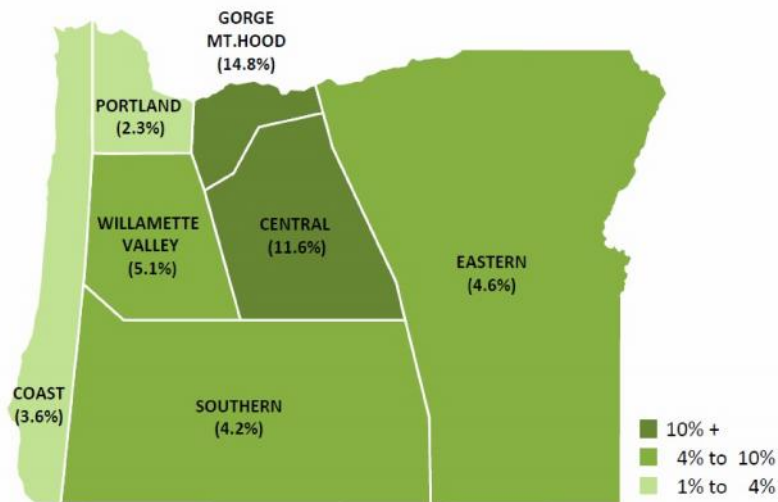
Total Trip Expenditures by Category, 2012



Dean Runyan Associates



Bicycle-Related Share of Travel Spending, 2012



Dean Runyan Associates

Appendix 6

Cities Scoring Big with Sports Marketing Initiatives

A report published in 'Virginia Town & City' (the magazine of the Virginia Municipal League) concerning localities adding sports marketing to their tourism mix. The article provides helpful development and marketing tips and advice to municipalities.

PARTICIPATORY sporting events have become big business for municipalities around the country. Youth baseball tournaments, cheerleading competitions, gymnastics meets, and half marathons attract out-of-town athletes along with their families and friends who generate revenue for the community by spending money on hotels, restaurants, entertainment and shopping. Although the weak economy has curtailed vacation plans for some families, travel to amateur sporting events remains strong nationwide. Parents whose son or daughter is scheduled to play in an out-of-town soccer tournament will find a way to pay for the trip, even if it means tightening the budget in other areas.

Increasingly, communities are tapping into this lucrative segment of the travel market. Before dismissing sports marketing as only being beneficial to large cities that can afford to build multi-million dollar arenas for professional sports teams, consider Panama City Beach, Fla. In 2007, this community of about 9,500 residents (35,000 in the unincorporated area) realized in excess of \$18 million in estimated economic impact from softball and baseball tournaments alone, according to Don Schumacher, executive director of the National Association of Sports Commissions.

Schumacher cites the history of the national association to illustrate the growth of the sports marketing industry over the past two decades: in the late 1980s, approximately 30 cities were competing to host sporting events. When the National Association of Sports Commissions formed in 1992, it had 15 members. Today, more than 500 tourism bureaus, sports commissions, convention facilities, event owners, and other organizations are members of the association.

A major advantage of “grassroots”

sporting events, says Schumacher, is that they are “relatively resistant to downturns in the economy.” Someone who trained for six months to participate in a triathlon, for example, isn’t going to let increased gas prices keep her from fulfilling her goal. Schumacher acknowledges, “the competition has expanded, but the number of events has more than kept pace.” In other words, there is room in the sports arena for cities

field, you might be able to host an archery event, or lacrosse or rugby, or even horseshoes. Think about smaller ‘non-traditional’ events – equestrian events, fishing tournaments, bowling or disc golf.”

Along these lines, Virginia Beach Sports Marketing Coordinator Buddy Wheeler said, “We have something going on just about all the time because we’ve gotten creative in what we look at. It’s not just about bringing in the Super Bowl or USA Track and Field.” Virginia Beach, for example, hosted the USA Judo National Championship this spring, the National High School Coaches Association Wrestling Championship, the USA Indoor Field Hockey tournament, a cheerleading and dance competition, and a running festival, generating more than 31,000 hotel room night sales, which is a key economic impact indicator in this industry.

These kinds of participatory events generate significant revenue, often unrelated to ticket sales, which some events don’t even have. An economic impact study on the 2004 Columbus Day Soccer Tournament in Virginia Beach estimated direct spending for lodging, transportation, meals, shopping, and entertainment by out-of-town coaches, participants, parents and spectators at more than \$1 million. Three hundred of the 400 participating teams came from out of the area, meaning significant business for hotels during the shoulder season in October.

“We’re really only constrained by limitations on our venues,” Wheeler said, “so we’re hoping to develop new venues.” That’s exactly what happened when Virginia Beach identified the city streets as a venue for the Rock ‘n’ Roll Half Marathon on Labor Day weekend. What began as a race with 12,000 walkers and runners has grown dramatically over eight years and is anticipated to sell out again

Get started on a sports marketing program

- Conduct an inventory of available facilities (including school gyms and ball fields, open spaces, etc.). What kinds of facilities are available and for which levels of competition (i.e., elite athletes or youth teams)?
- Determine how many hotel rooms would be available to accommodate out-of-town athletes and spectators.
- Inventory local expertise – sports clubs, residents with experience in various sports.
- Research sports marketing efforts in other cities of similar size.
- Register at vatc.org to receive Virginia Tourism Commission sports marketing updates and join statewide collaborations.
- Join the National Association of Sports Commissions to take advantage of conferences and other educational resources.

and counties with facilities that can accommodate competitions of all kinds. “It’s a facilities-driven business,” Schumacher said. “The most important element is facilities.”

Nevertheless, don’t lose hope if your city doesn’t have a multi-field soccer complex waiting to be programmed. “Facilities” can be anything from a park with a few baseball fields, to a half a dozen high school gyms, to a trail system, to a large parking lot. According to Kelly Larkin, director of marketing and events for the Hampton Roads Sports Commission, “If you have an open

this year with 20,000 competitors, a majority of which are from out-of-town. Likewise, using the beachfront as a sports arena, this year's Sand Soccer Tournament in Virginia Beach was larger than ever, offering not only soccer but also beach lacrosse and beach wrestling.

Getting to the starting line

For municipalities who have not yet considered a sports marketing initiative, Don Schumacher has three pieces of advice: take an inventory of the kinds and levels of facilities available and the number of hotel rooms nearby; find out what other cities of comparable size have been able to accomplish; and join the national association to take advantage of research materials and educational conferences.

Additionally, Virginia Beach's Wheeler suggests that cities inventory local expertise. For example, if an ex-volleyball professional lives in town or if a community has a strong running club, they can help the city identify

Christiansburg Aquatics Center at-a-glance

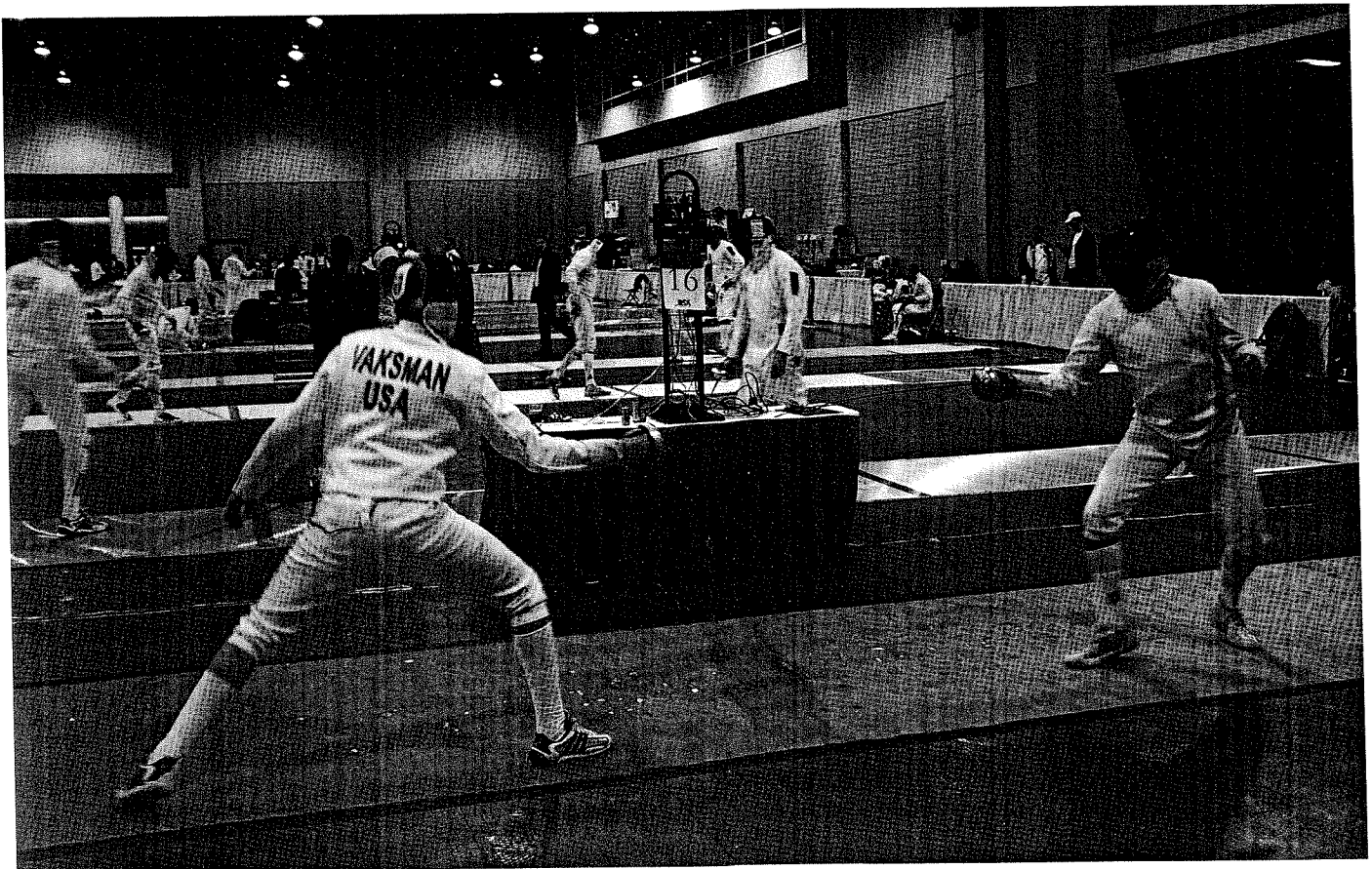
- 50-meter competition pool
- Diving platforms for 1 and 3-meter springboard; and for 5, 7 1/2, and 10-foot platform diving
- Family pool with slides and water features
- Heated therapy pool
- 1,100 seats for spectators
- Sun deck
- Anticipated completion: Winter 08-09
- Estimated cost: \$15 million, including \$5 million contribution from Virginia Tech
- Available for swim and dive meets, water polo matches, synchronized swimming, scuba and kayak lessons, special events.



necessary resources and attract a tournament in that sport. Local clubs also can be important sources of volunteers and referees.

Corey Peterson, who spearheads the City of Hampton's sports market-

ing initiative, agrees that working with local resources is crucial. The city recently collaborated with Hampton resident Boo Williams – who serves as the national chair of AAU Boys' Basketball – and his partners to build



The City of Richmond was host for the U.S. Fencing Division I championships in December.



generate significant revenue for the local economy. The Christiansburg Aquatics Center, a \$15 million multi-purpose aquatics facility with three bodies of water under one roof, will open this winter (see page 10).

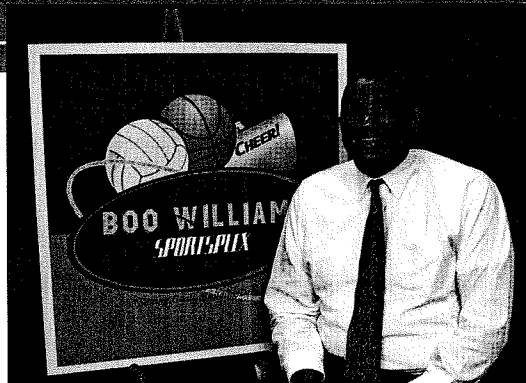
According to Town Manager Lance Terpenny, the motivation to build an aquatics facility arose from a long-range recreation management plan that included a citizen survey, which put a swimming facility at the top of the wish list. A former competitive swimmer himself, Terpenny says that a former coach suggested that he contact the swimming programs at nearby Radford University and Virginia Tech to ask if they would contribute money to the project in exchange for holding meets there. Virginia Tech pledged \$5

Hampton collaborated with Boo Williams, who serves as the national chair of AAU Boys' Basketball, and his partners to build a \$13.5 million sportsplex.

the \$13.5 million Boo Williams Sportsplex. The city leased the land to the private company, which built and operates the facility. City and Sportsplex representatives work together to market the 135,000 square-foot facility that can be configured for basketball, track, volleyball, lacrosse, hockey and other sports.

Partnering with local organizations can be the key to successful municipal sports marketing initiatives. For example, the City of Chesapeake and the Chesapeake Horseshoe Club team up to host an annual tournament that brings visitors to town.

Similarly, Sports Backers, a sports commission in Richmond, worked with the City of Richmond to host the U.S. Fencing Division 1 / Veteran North American Cup in December. According to Mike McCormick,



communications director for Sports Backers, "Essentially we have a very strong partnership with the Richmond Convention and Visitors Bureau to work to attract events to the Greater Richmond Convention Center. One of the keys to the deal was that Sports Backers own \$500,000 worth of SportCourt flooring, and we were willing to provide it for the tournament at no charge."

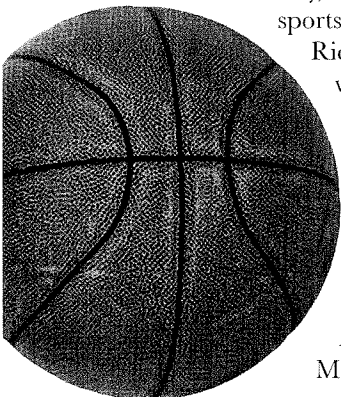
The three-day fencing competition brought approximately 1,000 athletes from around the country and several foreign countries to Richmond to compete in foil, sabre and epee. Investments in equipment that broadens the versatility of a facility or enhances a city's ability to host events can pay big returns. The better equipped the facility, the more potential to accommodate athletes at all levels.

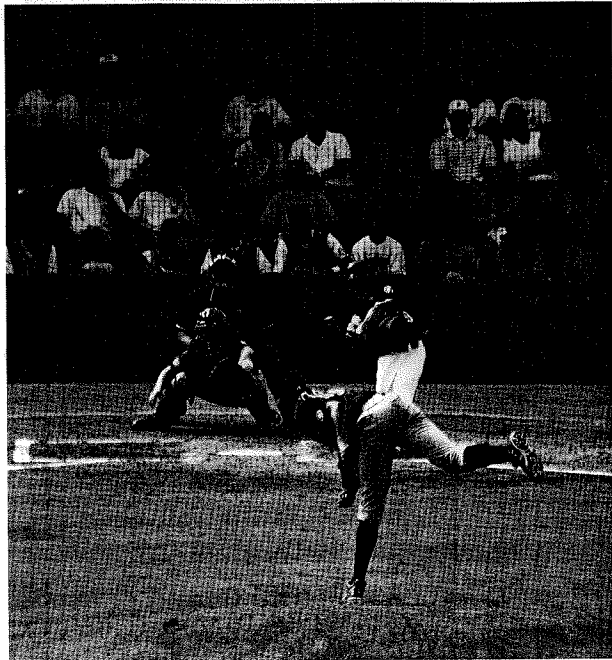
The Town of Christiansburg, with a population of about 20,000, recently made an investment in recreation for its citizens, an investment that also will

million to the project, enabling the town to fund the difference between a recreational pool and a facility that can host Atlantic Coast Conference intercollegiate meets, high school championships and Olympic trials.

Initial interest in the facility by meet managers is high. "I only wish there were 75 weekends in a year instead of 52," Terpenny said. "We'll have to work around other events that fill up the hotel rooms" in Christiansburg and Blacksburg, which is approximately 10 miles away.

Christiansburg residents will benefit from revenue generated by visitor spending, but they also will benefit by having access to the facility, which will have a family pool with slides and water features and a heated therapy pool. The facility will be suitable for everything from scuba diving and kayak lessons to water polo and synchronized swimming. "We tried to be diligent to accommodate every aquatic need that will come up in the New River Valley," said Terpenny, who also serves as VML vice president. "We wanted to put revenue generated from recent growth in the Christiansburg area back into the community in quality of life measures for citizens."





Thanks to the new Glen Allen Stadium at RF&P Park Henrico County was able to host the Babe Ruth Baseball World Series.

Join the state team

One of the best ways for communities to get involved in sports marketing is to join Virginia's state-wide sports marketing program, which is in its infancy but growing rapidly. The idea is for cities and counties to collaborate on events that can benefit more than one municipality, and to participate in joint marketing efforts at national conventions where managers go to find new venues for their tournaments and competitions.

Although a small town might not be able to host a tournament on its own because of limited hotel accommodations, it might be able to co-host a long-distance cycling race that would pass through a number of municipalities. Joni Johnson, national sales manager for the Virginia Tourism Commission, serves as the point person for the Commonwealth's sports marketing efforts.

By the end of the summer, VTC will launch a Web site to provide resources for localities wishing to host events and for sports managers looking for facilities. Additionally, marketing materials and a display booth are being developed for use at trade shows such as the TEAMS Conference (Travel, Events and Management in Sports) in Pittsburgh in October. Representatives from

organizations such as the National Amateur Baseball Federation, the National Senior Games Association, AAU Powerlifting, USA Track & Field, USA Equestrian and many others attend the TEAMS conference each year.

In states such as North Carolina, Texas and Kentucky, collaborative efforts have already brought home sports marketing trophies. The state of Kentucky, for example, recently bid on and won the World Equestrian Games for 2010, a 16-day event that is expected to draw more


than 800 athletes from 60 countries and 500,000 spectators. This will be the first time the competition has been held outside of Europe. The Fédération Equestre Internationale, which holds the games every four years, estimates an economic impact of more than \$150 million in the state.



Continued growth predicted

No doubt, competition in the world of participatory sports marketing is increasing, but according to industry representatives Don Schumacher and Kelly Larkin, there is still plenty of business to go around as the industry continues to grow. Schumacher reports that more than 70 percent of 10-12-year-olds in the United States participate at least once a year in a team sport. Moreover, participation by the running community in "destination" races continues to increase, and lacrosse leagues are expanding. Larkin stresses that while youth sports is an important segment of the market, older athletes are extremely active as well, and they often plan their travel around sporting events.

In Henrico County, the economic impact of amateur sporting events in 2005-06 was approximately \$31 million, and the opening of the new Glen Allen Stadium at RF&P Park last year increased the county's ability to accommodate baseball tournaments. The Babe Ruth Baseball World Series, which was held in the new stadium, brought 10 teams from around the country and resulted in an estimated impact of \$500,000. The county hosts everything from adult flag football tournaments to girl's softball to soccer to cricket. According to Andy Crane, sports supervisor for the Recreation and Parks Division, "Everyone is realizing the economic impact from youth sports, and adult sports. It's there if you're willing to go after it."

As interest builds in sports like adventure racing and mountain biking, as lacrosse programs spring up around the country, and as long as children love to play softball and baseball, communities will see returns on investments made in sports marketing programs. From table tennis tournaments to cross country meets to AAU jump rope competitions, the sports event industry brings home the gold. 

About the author

Katherine Jackson is a freelance writer who has worked in municipal government, state government, and private business.

Emerging travel market segments

- Generation X'ers (born after 1965) and Millennials (born after 1982)
- Voluntourism (combining travel with volunteer service)
- Culinary Travel
- Travelers with Disabilities
- Girlfriend Getaways
- Destination Weddings
- Pet Travel

Source: 2008 Outlook for U.S. Travel and Tourism

Appendix 7

NASC Report on the Sports Travel Industry

This report prepared by the National Association of Sports Commissions (NASC) examines key issues surrounding the sports travel industry - particularly the roles of CVBs and sports commissions and ways in which they can combine resources to the benefit of the markets they serve.

INTRODUCTION

This report has been prepared by the National Association of Sports Commissions (NASC) as a service to its membership and on behalf of the sports events industry. The NASC promotes industry best practices through its web site and its many meetings, workshops, and webinars.

INDUSTRY AT A GLANCE

Key Statistics

Visitor Spending in 2011
\$7.68 billion +

Growth Since 2010
6.5%

Event Growth Since 2010
10.5%

Sports Visitors in 2011
23.9 million

NASC/Ohio University Industry Study, 2011

The sports travel industry consists of many different forms of individual and team travel. There are regular season professional, collegiate, and scholastic events. There are championship events and an entire universe of participation based amateur events. Some travelers are part of a team, while others are parents and family of competitors: they are along to support their family member(s) and also enjoy the trip itself. Still others travel to participate in activities like climbing, camping, cycling, scuba diving, tennis, golf, birding, hunting and fishing. Nostalgia also plays a role: visits to sports halls of fame, participation in a fantasy camp, and tours of famous sports facilities. Still other travelers decide to purchase tickets to an event during a trip made for a very different reason (a business person goes to a baseball game while on a business trip). All can be included in the sports travel industry.

Although reasonable people have been known to disagree on how to compute the economic impact of sports travel everyone will agree visitors have a beneficial impact. They come, they stay, and they spend. The new dollars entering the local economy benefit local businesses and produce new jobs and taxes.

Some travelers are “day trippers.” Their impact on the local economy is welcome but not as great as that of an overnight visitor.

Communities have learned that visitor expenditures on room nights, restaurant meals, and retailers are good for the economy. Just as cities have competed for decades for meetings, conventions, and traditional tourist travel they now compete to host sports events or attract the pursuit of favorite sports activities. Cities have also learned that most of the events take place whether the economy is good or in recession. This element of resistance to economic downturns

has brought new cities and suppliers to the industry. Historically the job of attracting visitors has been the responsibility of a convention and visitors bureau (CVB) and/or state department of tourism. Meetings, conventions and traditional tourism are based upon the available mix of meeting facilities, types of accommodations, and the number and kind of attractions. Marketing campaigns are developed to stress the advantages offered. These campaigns are targeted to the market segments best served by the destination.

Sports travel shares some of the characteristics of traditional tourism: if the purpose of a trip is to participate in an individual sports activity like golf, the benefits of the area to golfers are the message. Golfers are targeted through media like the magazines they read and tournaments they watch. This area of sports tourism remains the focus of destination marketing professionals and the venues they serve.

Team travel or an individual travelling to compete in an event can present quite different circumstances. To prepare for and run the event can take many months and sometimes years. A local organizing committee is needed and must be staffed. Fields or courts must be found, evaluated, scheduled and prepared. Courses must be established and outlined. Suitable accommodations must be found. Brackets must be prepared. Tickets and sponsorships may need to be sold. In short, there are many details that are not part of traditional tourism or even meetings and conventions.

Most conventions and meetings employ meeting planners who work with the local venue. This person will sometimes request assistance from the CVB to prepare for the event.

With sports, however this is not usually the case...sports events have special needs, so "the work STARTS after the sale is made!"

Many cities have realized sports travel is a specialty. They have created sports commissions or sports authorities staffed by experts who understand these special needs. These experts understand where events can be found and have relationships in place with many event owners.

About 110 of these special sports organizations can be found today. Some are affiliated with a CVB or chamber of commerce. Most are independent organizations. The National Association of Sports Commissions, the industry's trade association, estimates that of the 110 sports commissions about 20 are affiliated with a CVB. The other 90 markets have both: a CVB and a sports commission.

A CVB is staffed with destination marketing professionals. Commissions are staffed with sports event specialists who can sell and produce events. In general, the larger the market the more likely it will be to find both.

It is the purpose of this report to examine the roles of CVBs and sports commissions and recommend ways in which they can combine resources to the benefit of the markets they serve. We will also discuss other parties to the process including the event owner (sometimes referred to as the event rights holder), hotels and sports venues, and housing bureaus.



THE ROLES OF SPORTS COMMISSIONS AND CONVENTION AND VISITORS BUREAUS

It is a fortunate destination that has both a CVB and sports commission. The combination provides the best of both worlds. The ability to combine strengths can produce an effective strategic plan and agreement on role sharing. Historically CVBs have billed themselves as “one stop shopping” for visitors. This is not true for sports events. CVBs need to establish partnerships that will provide the event assistance needed. It is the sports commission that offers everything possible in terms of what it takes to obtain and produce a sports event.

A commission will know what kinds of sports facilities are available for which sports, age groups, and levels of expertise. They will also know how many of these facilities are “tournament friendly.” It is not enough to know the number of baseball fields in the destination. It is necessary to know how many are *suitable* for the level of play of the event, how many fields the event must have, and where the fields are in relation to each other and overnight accommodations.

Sports commissions have relationships with venues. They also know most of the event owners who have events suitable for these venues. The importance of personal relationships cannot be overemphasized.

Commissions, however, will not usually have an understanding of the number and kind of hotel rooms available at various prices during the time the event is scheduled to take place. They probably do not have the capacity to book rooms. They also may not have promotional material on the features of a visit to the area.

Interestingly, most sports commissions are led by executives committed to the cities in which they live. They usually do not move from market to market during their career. When a job becomes available, it can be difficult to convince an executive to switch markets. This difference can be very important: commission staff members are often referred to as “lifers” because of their passion and expertise in their business community. It is easy to understand how important this can be when selling sponsorships, selecting fields or courts, recruiting volunteers, knowing where sport-specific expertise can be found, etc.

Sports commissions may receive financial support from their CVB. Those that do have demonstrated the ability produce significant numbers of room nights.

It should be apparent that bids which draw on the expertise of both organizations can produce the best results. Conflicts have occurred, however. The recession has placed a spotlight on the ability of sports events to withstand economic downturns. This makes them attractive to any destination. Problems can begin with a lack of understanding of the market’s ability to support events and what it will take to be successful. Event owners may demand incentives that cannot be met. Common mistakes include bidding without an understanding of the requirements and assuming all it takes is more sales calls to produce dozens of additional events each year.

The latter issue can be crucial. If a CVB sees that the sports commission is successful they could be tempted to assume all it will take is more sales people and a bigger travel budget and the number of events will rise dramatically. Unfortunately it usually turns out that the area cannot support financially many more events, or that the facilities are not available often enough, or there is simply not enough expertise available.

Perhaps worse, there remains the feeling that somehow (and magically) success will come by obtaining sales leads at a trade show booth. The old mentality of “get a booth and we will get leads” disregards the role of personal relationships and event expertise that goes into a successful bid (and event!).

Room nights...a crucial factor

There is another fundamental difference between CVBs and sports commissions. *CVBs are supported completely or in very large measure by the room tax. This means a focus on generating room nights.* Increasing the number of overnight visitors through meetings, conventions, and traditional tourism is the central role of the CVB. Sports events are now seen as a dependable source of room nights.

Sports commissions share interest in visitors, but they are also concerned with additional measures of success.

As a general rule, sports commissions are interested in attracting and producing sports events. This is what they understand and do. It is in fact their passion. The generation of economic impact through visitor spending is an important element for any commission. Since a sports commission is not primarily funded by a room tax (except in those cases where the commission is a department of the CVB), they are also concerned with quality of life issues. This interest stems in part from their primary source of funding: the corporate community.

Corporate supporters want their commissions to find events that become “big ticket” events that they and their employees can enjoy.

They may also want to know their commission is actively encouraging young people to participate in sports. The issue of childhood obesity has become an important local issue for many sports commissions.

Economic impact, quality of life, televised events and other media coverage, and the production of local sports events are of concern to sports commissions. Some are also involved in local sports programming. They can be particularly interested in managing or creating sports events where they can share in revenues. *So, for a sports commission, room nights are not the only focus.*

This difference in the degree of importance of room nights is an important distinction when considering the roles of sports commissions and convention and visitors bureaus. It is also the fundamental reason why they can work so well together.





THE BID PROCESS

We have established the scope of sports travel and the basic differences between sports commissions and CVBs. Because producing room nights are part of what one and virtually all of what the other does, it is appropriate to cooperate in preparing a bid. Most cities divide responsibilities between preparing for and staging the event and finding suitable accommodations. Both will usually share in the preparation of the bid and will often join for the presentation. However, when responsibilities are assigned, they must not duplicate each other. From time to time there have been instances where the relationship has not been as strong as it should be. Personalities are usually the cause, and care must be taken to resolve such issues before prospects recognize what is happening.

The NASC was founded in part to assist its members in the evaluation of bid opportunities. This is a subject that has received a great deal of attention over the past twenty years.

The most popular events can demand bid fees or guarantees. These events develop a track record that shows potential bidders what they might expect if chosen. A potential host organization may learn that an event has a record of bringing 5000 or so people to town. If the average length of stay can be determined it is not difficult to assemble a projection of the total room nights and approximate visitor spending. These numbers can be crucial to the decision to bid and whether to offer incentives.

The recession has affected the ability to pay bid fees. Room nights may be up on a per night basis, but many destinations have seen a drop in the number of nights in each stay. This has had an impact on budgets.

Fewer destinations are prepared to write checks. What they are doing is seeking ways to offset event expenses so the rights holder comes out of the event with the right balance between revenues and expenses.

Some destinations have decided not to pay bid fees. They rely on their reputation as an excellent host, bid on events with no fees, or develop their own locally produced events.

Other events may be connected to a prestigious organization. As one good example, the National Collegiate Athletic Association (NCAA) conducts men's and women's basketball championships in various divisions but they also conduct dozens and dozens of other championships as well. These events are usually sought by communities wishing to attract visitors and the honor of hosting an important event. Some come with regional or national television coverage. This coverage supports destination promotional activity.

Steps in a bid

The first step is to determine what the event owner is looking for. Only then can it be decided if the destination matches up with the requirements. Many events are offered through a Request for Proposal (RFP). If the event owner has done research on their own event(s) they will know how to describe their needs. The process is more art than science. Potential bidders need to determine the results obtained in other cities. These results are then compared to the RFP. Differences must be resolved before submittal.

As noted, the event should be able to list the number of fields or courts needed and how close they need to be. Some events want to use only one or two sites for all of their competition. Logic suggests that the closer the sites are to hotels and restaurants, the better the match. These hotels must also be the right kind (e.g. select service hotels with a "free" breakfast and the right number of rooms with double beds, etc.). The harder it is to gather good information the more careful the city should be. Experienced bidders have found that limited event histories usually suggest more care in negotiations.

The quality and characteristics of facilities must be right for each event. For example, younger age groups use smaller fields. Every field must be in acceptable condition, and only experience will help in this determination. Bidders must know the correct dimensions and features necessary to a successful event.

Volunteers can be an issue. Event owners will welcome or require volunteers. The volunteers need to know what to do, when to do it, and will need food, beverages, and parking. They may also need uniforms and credentials. The longer the event runs the higher the investment in volunteers and the greater the risk of “burn out.”

The best way to evaluate the potential return on investment (ROI) is to assemble the people needed to administer the event if the bid is successful. This group should always include experts in the sport in question, people with some connection to the event owner, those who can find funds if needed, the source(s) for volunteers, and representatives from the sports commission and/or CVB. Since CVBs are not generally able to produce sports events, the people who do must be on the team.

If the bid does succeed, the Local Organizing Committee (LOC) is created from this core of volunteers. The LOC will cooperate with the event owner to produce the event.

There may be staging expenses: signs, banners, sound systems, highway directional arrows and many others. Portable restrooms, seating, and even temporary lighting may be required.

In the 1980's the industry was in its infancy. Event owners were more relaxed in their requirements and less was expected by competitors, coaches, family and friends. This has changed: the business of amateur sports has become just that, a business. When cities and event owners approach negotiations with a business-like attitude, the chances for success improve.

Most popular events will select cities at least one year in advance. Many times bids are accepted several years out. This can present problems reserving fields and rooms and predicting the level of financial support.

Bidding is a matter of knowing what the market can handle and searching for events that can be satisfied with those capabilities. A good fit requires very close cooperation between the prospective host and event owner.

Accommodations

Each event has its own housing requirements. Many team events are looking for “double doubles” and a free breakfast. Others are more focused on single or double occupancy while still others prefer camping or spaces for recreational vehicles.

The system used to book hotel rooms must be understood at the outset. Some events want the host to handle the job. In these cases the CVB will probably step in and help. Other event owners retain the services of companies skilled in finding and booking rooms. These housing bureaus or third party booking services can be helpful in locating the right properties and negotiating favorable rates.

What can be an issue is a tendency for some event owners to permit third party housing bureaus to select host cities. If the event will take place in a convention center, it is feasible to believe the booking service can help select the site. If the kind and quality of courts and fields are important, as they always should be, a housing service should not be involved. There have been cases where hosts have been selected as much for their ability to produce commissions and rebates as their ability to provide a proper competitive experience.

Contractual issues can become crucial: some event owners may want a guaranteed room block and prices but no contract. They may also object to an attrition clause, which could apply financial penalties if the room pick-up is less than projected.

Room contribution systems are common. Every room carries an additional fee. This fee will vary from event to event, market to market, and be divided between one, two or even more entities at the conclusion of the event. Provision to collect these fees must be made in advance of the event. It is important for all parties to agree in advance on how these rooms will be tracked and confirmed as part of the block reserved.

Another factor must be considered: “stay to play” systems are becoming more common. In these cases teams select from a hotel on the approved list or are assigned to specific hotels. Each hotel agrees to collect the fees and forward them to the appropriate entity.

Some teams would rather not pay the fee and have been known to stay a considerable distance from town to avoid the block. Under the “stay to play” system, each team or individual must stay at a property within the block or they will not be able to participate. It is extremely important to disclose in the promotional material any and all rebates and commissions. It is anticipated that “stay to play” will be utilized more and more every year.

Event owners and host organizations would do well to recognize that any room contribution system is a tax on participants. Visitors must be happy with their experience. Many event managers feel the team registration fee should be all-inclusive, with no extras.

Everyone needs to realize that travelling team parents are investing thousands of dollars a year, often per child, to participate in these events. The more they have to pay, the less tolerant of additional fees they are.

“Stay to play” systems can work very well on new events. They may not work as well on an established event. Repeat participants usually know where they want to stay, and restrictions on this right can cause problems. Most events using the system take care to be certain room rates are competitive, if not lower than what might be available on the open market.

It can be difficult to determine room rates. There can be group rates, discounts from a variety of membership organizations, specials on the hotel web site, or still other rates from an on-line discounter. Stay to play can avoid these issues.

Once the analysis is complete, decisions can be made. It is inevitable that not all events will be suitable for the market. The investment may be too high for the budget. There may not be sufficient sports facilities and rooms in the right categories at the right time. There may not be sufficient local expertise. It may not be possible to close the right streets and roads to insure the safety of participants. The solution is to look for events that better fit capabilities.

The bid itself

Every bidder wants to stand out. They will work to get decision makers to their destination to check things out before the bid. Failing that, they will try to insist on a visit before decisions are made. This may require covering the expenses of an evaluator or an evaluation team. Basically, the goal is to get the prospect to town before site selection.

Videos can be effective. The bid team may dress in special uniforms or clothing. The bid packages may be full of color and contain lots of photographs. Officials from the public sector may join with the bid team. Celebrities or local experts in the sport may be called to participate.

Whatever the strategy, there are no unimportant questions in the RFP. Every question is asked for a reason, and every question must be answered. Nothing should be left to chance. If, for example, the RFP requires four softball fields that meet or exceed specifications, these four fields should be included in the bid package. This is not something to leave until a site visit unless, of course, you have so many field choices that you want the event owner to make the final selection.

An example of something that can be left for a later decision would be the location for an opening picnic or closing banquet. If you have multiple ideas, include them in the bid with the note that a final determination can be made later. When responding to an RFP, avoid the use of “not applicable.”

With the rapid growth in host organizations and event owners, as well as the number of events, it should not be surprising to learn of the failure of some to do appropriate homework. Some cities are promising to deliver before understanding what they are promising. There are rights holders who are growing so fast details are not pinned down and misunderstandings occur along the way.



EVENT OWNERS

It is not possible to produce a comprehensive list of all of the event owners with events able to select destinations. Although the NASC has compiled a list of about four hundred of the best known event owners, the true number is closer to twice that.

There has been no attempt to compute the total number of events that attract visiting teams or athletes, mostly because the overwhelming percentage are locally produced and will not change locations. The NASC suspects tens of thousands of events fall in this category. These events are valuable because they are repeated year after year and cannot be lost in a competitive bid.

Some of the most recognized event owners include the National Governing Bodies (NGBs) in every Olympic and Pan-American Games sport. These include USA Gymnastics, USA Swimming, USA Track and Field, etc. etc. Each has a full-time staff and is interested in options for their events.

Every other organization with an event is an event owner or an event rights holder. They have at least one or perhaps hundreds of events. These events can be national championships or regional and even local events. They can be part of a special tour or an exhibition. They can be international “friendlies” where teams from the USA compete against international squads, usually among elite athletes and normally through an NGB.

Event owners include the National Collegiate Athletic Association (NCAA), Amateur Athletic Union (AAU), National Association of Intercollegiate Athletics (NAIA), United States Specialty Sports Association (USSSA), National Softball Association, and hundreds of others.

When an event owner wishes to attract the attention of bidders, it is important to describe completely all of the requirements and provide a history for the event. In today's economy, potential host organizations need to know precisely what they are being asked and know what has happened previously in other cities. As we have observed, economic pressures have made it more difficult for cities to “buy” events. In fact, events that

can be “bought” may not be a good potential partner. The emphasis on site selection should be placed on the quality of the facilities and pledges of local support.

It has been noted some communities will not pay bid fees. Others have either emphasized locally grown events or turned exclusively to events that will stay where they are and grow over the years.

There can be confusion over what constitutes an event owner and a “tournament director.” It is probable that an event will provide the tournament director. This person will be an employee or someone retained to serve in that role.

All of the events developed and produced locally have tournament directors. These events have been around for many years and do not move. There are cities that have multiple local events that attract hundreds of visiting teams.

Soccer is an example of a sport where tournament directors can gather and discuss issues of importance. The United States Youth Soccer Association (USYSA) is an example. The USYSA holds an annual workshop where tournament directors and organizers can exchange information on best practices. It should be evident these same dedicated professionals are not event owners looking for new host cities.

So, communities bid on events, create their own, or assist existing local events in their efforts to attract more visiting teams and the beneficial economic impact of their visit. Many CVBs have learned the fastest way to increase room nights through sports is to assist local tournaments in attracting more visiting teams.





FACILITIES

Every event has its own facility requirements. As noted, they can vary within a sport. Younger participants may participate on a “short-sided” team that requires a smaller playing surface. Soccer commonly has 6v6, 8v8, and the traditional 11v11 formats. Basketball has become well-known for its commitment to the 3v3 game, which uses a half court. Rugby is emphasizing 7v7 and that version has been accepted for the 2016 Olympic Games. Even American football is seeing growth in the 7v7 game.

Softball might need a field with 300 foot fences (slow pitch) or 200 to 225 foot fences (fast pitch). A 200 foot softball field might also be used for youth baseball. Or, it is increasingly common to find fields that can be converted to any age group and skill level. They have removable fences and moveable bases.

There are softball fields that also have soccer fields running across all and more of the outfield grass.

The point is that potential hosts must know exactly what kinds of facilities are necessary. The owner must spell out these needs. Then, condition can become an issue. Too many fields, for example, have bare spots that could cause injury to participants. Potential hosts need to realize that someone, somewhere, has more fields or courts that are in better condition or are all located on one site. If one or more of those cities are participating in the bid process chances are they will be favored.

There is a good deal of experience and skill involved in selecting sites and negotiating rates.

When on-campus facilities are considered it will become apparent they are not available for most of each year. Needing campus facilities for an event and being able to schedule them at the right time and for an acceptable price can present challenges.

So, every city must know exactly how many facilities are available during the dates requested and whether they are appropriate to the event.

A facility audit can uncover tournament quality facilities. It will also uncover needed modifications or improvements. And, it becomes the foundation for new facilities that can serve both the unmet needs of residents and those of tournament directors. It is very important to select a qualified supplier to conduct the audit. In this process, every tournament quality facility is surveyed. The audit will determine whether a facility is tournament ready and for which age groups and levels of skill. It will also determine those sports that should be emphasized and why. Finally it should offer reasons for every selection, provide a list of event owners with events that could fit, and recommendations as to modifications and improvements to each facility and the impact these changes could have each year.

Many communities create a sports facilities guide to assist event owners. Every community maintains a web site that demonstrates the capabilities and experience of the host organization.

There has been a substantial increase in the number of amateur sports complexes. These can be indoor or outdoor or a combination thereof. They are being financed through municipal bond issues, an increase in the sales or restaurant tax, or with a portion of the room tax. Many are private developments. These are designed to emphasize service to the local market and the capability to host tournaments that will attract visitors. A privately developed complex will have its attention focused on profitable operations. If tournaments take place that also attract visitors that is fine but not the focus of the enterprise.

Most private operators want to host tournaments.

It has been observed that communities are either modifying or improving their facilities, building new complexes, or falling further behind. New facilities must be developed with tournaments in mind. Experts are available to assist in these processes.





IN CONCLUSION

Sports commissions, CVBs, event owners and facilities play roles crucial to success in the sports travel industry. As the sports segment of the overall domestic travel industry continues to expand, more potential host organizations begin to focus on the segment. Every year some events are cancelled and new ones come on line.

Many regional competitions come about because a host organization asked the event owner what they could do to support them. Rather than lose a prospective host, the event owner allows the interested host to create a regional event that brings a significant number of teams to town without bid fees or guarantees.

Host organizations should never lose sight of the fact that there are more average to below average teams and athletes (in terms of their playing ability) than their more talented competitors. Regional events tend to draw well because of this fact plus a shorter drive time. There may even be more time for each team or family to enjoy additional things to see and do before or after the event.

The NASC expects a significant amount of new facilities development. Many of these will contain multiple courts or fields designed specifically to meet the needs of tournaments. One of the most active groups is local soccer organizations/clubs. They are raising money, buying property, and building their own fields. Doing so simplifies scheduling of practices and games and makes it possible to limit use and protect the turf for tournaments that are becoming major fund raisers for the owning club.

The NASC has served the needs of the sports travel industry since 1992. Some of its members were fully engaged in the industry long before a description for the business was developed. Very few people will remember Los Angeles was the only bidder for the 1984 Olympic Games. International politics certainly played a role, but there were no other bidders. Today each Olympic bid cycle attracts several attractive potential hosts and years of spirited competition.

Although it is possible to start from scratch and make all the mistakes others have made, especially in the past

three decades, it makes a great deal more sense to join the NASC and begin a much more rapid process of “getting up to speed.” The NASC has a comprehensive web site with invaluable tips and techniques available to members only. The association also sponsors a series of meetings each year where members or prospective members can participate. In addition to sports commissions and CVBs, departments of parks and recreation have begun attending these events. Because these departments often operate some of the most useful sports facilities they are becoming a fast growing new partner to many host organizations.

The NASC offers its annual Sports Event Symposium in April, a series of market segment meetings (where participants are broken down by type of organization), and regional workshops for members and prospective members. More than 90 percent of all attendees at the Symposium report they will do business with another attendee.*

The NASC Certified Sports Event Executive (CSEE) Program is the industry’s only professional certification program. Certification requires completion of a series of modules over several years and actual experience in the sports event industry.

For more information on the NASC and its many member services and benefits, please call 513.281.3888 or visit www.SportsCommissions.org.

** (Source: Enigma Research Corporation, official research supplier)*





GLOSSARY OF TERMS

Below are commonly used terms, phrases, and acronyms that all professionals in the sports event industry must know!

Convention & Visitors Bureau (CVB) – A resource for sports event planners bringing events to their community. Provides services, including, but not limited to, hotel & restaurant information, calendar of events, visitor guides, housing, attraction & shopping information.

Economic Development – Occurs at the state, regional, or municipal level, or in public-private partnership organizations that may be partially funded by local, regional, state, or federal tax money. These organizations seek out new economic-generating opportunities while working to retain their existing business wealth.

Economic Impact – Net change in an economy caused by activity involving the acquisition, operation, development, and use of sport facilities and services.

Event or Tournament Management – Process by which an event is planned, prepared and produced. Encompasses the assessment, definition, acquisition, allocation, direction, control and analysis of time, finances, people, products, services and other resources to achieve objectives.

Event Manager – Responsible for overseeing and arranging every aspect of an event, including researching, planning, organizing, implementing, and evaluating an event's design, activities and production.

Event Owner – Youth sports, multi-sport, national governing bodies (NGBs), grassroots programs and any other organization that owns events that are bid out and/or awarded.

Facility Guide – Document or online listing of sports facilities in the local area that can be utilized for hosting sporting events. Should include details of facilities including seating capacity, floor dimensions, lighting available, air/heating system, etc.

Grassroot Event – Sports competitions featuring amateur athletes from “8 to 80”.

“Heads in Beds” – Occupying hotel rooms with guests.

Host Organization – Sports commission, convention and visitors bureau (CVB), park and recreation department, venue and any other organization who host sporting events.

Local Organizing Committee (LOC) – Group of individuals in the community who form an ad-hoc committee to manage the procurement and running of sports events.

National Association of Sports Commissions (NASC) – The leading not-for-profit association of sports event travel industry professionals that provides professional development, industry research, and networking opportunities; also the producers of the NASC Sports Event Symposium.

National Governing Body (NGB) – The organization that represents each Olympic or Pan-American Games sport and is a member of its International Federation.

Request for Proposal (RFP) – A document that outlines the requirements to host a sporting event. Should include requirements for the following: hotel rooms, bid fee, facility/fields, estimated # of participants, complimentary services, etc.

Sports Commission – Organization created to support the development and hosting of amateur sporting events in their community. May be born out of a chamber of commerce, convention and visitors bureau (CVB) or be a department within a bureau.

Sports Event Travel Industry – Niche of the tourism industry that uses the hosting of sporting events to attract visitors to communities in order to drive economic impact.

“Stay to Play” – Rule used by some events which requires participants to utilize certain hotels in order to be eligible to participate in competition.

Supplier – Hotels, sports publications, insurance companies, consulting and research firms, housing services and any other company that supplies products and services to the sports event industry.

United States Olympic Committee (USOC) – Not-for-profit organization recognized by the International Olympic Committee as the sole entity in the United States whose mission involves training, entering and underwriting the full expenses for the U.S. teams in the Olympic, Paralympic, Pan American and Parapan American Games. The USOC oversees the process by which U.S. cities seek to be selected as a Candidate City to host the Olympic and Paralympic Games (winter or summer), or the Pan American Games. In addition, the USOC approves the U.S. trial sites for the Olympic, Paralympic and Pan American Games team selections.

Appendix 8

Equestrian/Equine Tourism

This document – (a) examines estimated equestrian tourism spending as it applies to Wilsonville (and beyond) and available market profile information of likely relevance; and (b) provides an Equestrian Tourism SWO, based on the specialist knowledge and insights derived from the industry interviews and consultations conducted for the Wilsonville Tourism Development Strategy,

Equestrian/Equine Tourism

Definition:

Equestrian tourism has been defined as “*Travel inspired by the horse, for recreation, leisure and business, encompassing all activity that has the horse as its focus.*” (From British Columbia based Study by Nicole Vaugeois)

Obviously Olympics’ recognized equestrian competition events, jumper-hunter events and related horse shows can be included. Various segments of equestrian tourists have been identified including those travelling with their own horses, those travelling without their horses and key subcategories such as competitors, recreationists, breeders, spectators, guest ranch visitors, equine education participants, equine shoppers and more. (Vaugeois Study – 2012 presentation)

Market:

- Value of Wilsonville’s Country Classic Horse Show (one show) spending conservatively estimated at \$450,000 or more.
- Wilsonville’s series of 6 summer horse shows estimated to have an economic impact in excess of \$10,800,000 – for competitor visitors only and not including thousands of day visitors and spectators.
- By way of comparison, a college derived study of a shorter (3 week) horse event in Blowing Rock NC (with 300 horses entered) found a total economic impact of \$7.7 million.
- “Horse people” identified as an affluent, high spend, frequent traveling visitor market (horse owners/riders)
- A market with discerning tastes – quality lodging/dining (etc.). Research undertaken by Wilsonville Holiday Inn indicates that in one year local equestrian events generated 800 room nights for the hotel. McMenamins also report good patronage from show visitors.
- Every horse entered in the Wilsonville horse shows brings 3 to 7 people with them depending on the discipline.
- Overnight show competitors spend an average of \$150 to \$200 per day, per person (American Horse Council)
- Each dollar a visitor spends circulates 4-6 times in a community (Travel Oregon)
- Horses particularly popular with female audiences. Women - main influencers of travel decisions.
- Profiling Horse show attendees in Wilsonville seems to suggest women aged from 40 to 65 are a good target audience. Many have ridden at some point in their life or grew up loving horses. Actual event participants seem to fall into the 19 to 35 years range.
- Divide of ‘horse people’ to non-horse people attending events estimated to be about 50/50.

- Participant feedback suggests they like Wilsonville events because the experience at Wilsonville is found to be “serene and peaceful, so beautiful, welcoming, nice and friendly” (cf. LA & elsewhere).
- Building substantial wider audiences for horse events has already proved achievable elsewhere in North America. (Calgary - a leading and successful case study.)
- Equestrian tourism industry data indicates growing numbers of horse riders in key national and international markets e.g. U.K.
- U.K. research suggests that these high spending Equine Tourists are seeking “atmosphere”, beautiful natural surroundings, adjacent to riding trails if possible and ready availability of information, amongst other things. International travelers also want to feel involved with the people and area. (UK Travel Trends research 2005)

EQUESTRIAN TOURISM SWOT

Strengths:

- Hunter Creek Equestrian Park (Summer Horse Shows venue) and its direct relationship with Wilsonville. Close proximity. Excellence of its dressage facilities.
- Wilsonville home to signature West Coast Horse Show Jumping and Hunting events
- The 'Wilsonville Shows' – official part of US and International horse show circuit
- Wilsonville name and identity directly associated with these events (not Portland) – now known on the 'circuit' as the "Wilsonville Shows" (and not so much by the "Country Classic" name anymore)
- The six recognized hunter-jumper circuit events are being managed by experienced and successful equestrian sports management team. Their circuit slot encompasses June to early September. These events are governed by the US Equestrian Federation.
- Many more equestrian/horse events and clinics held locally in various nice reputable barns and facilities as well. Often with leading horsemanship/dressage clinicians drawing large audiences and participants (e.g. 12 – 20 participants, 100 – 200 to watch) - paying substantial clinic fees.
- Value of Country Classic Horse Show (one show) spending conservatively estimated at \$450,000 or more. (Jennifer Johnson report to City)
- Series of 6 summer horse shows estimated to have an economic impact in excess of \$10,800,000 – for competitor visitors only and not including thousands of day visitors and spectators. (Ditto)
- By way of comparison, a college derived study of a shorter (3 week) horse event in Blowing Rock NC (with 300 horses entered) found a total economic impact of \$7.7 million.
- "Horse people" - an affluent, high spend, frequent traveling visitor market (horse owners/riders)
- This market's discerning tastes – quality lodging/dining (etc.) important to them. Wilsonville Holiday room research indicates that in one year local equestrian events generated 800 room nights for them alone. McMenamins also report good patronage from visitors to the shows and owners.
- Every horse entered in the shows brings 3 to 7 people with them depending on the discipline.
- Overnight show competitors spend an average of \$150 to \$200 per day, per person (American Horse Council)
- Each dollar a visitor spends circulates 4-6 times in a community (Travel Oregon)
- Horses particularly popular with female audiences. Women - main influencers of travel decisions.
- Profiling Horse show attendees in Wilsonville seem to suggest women aged from 40 to 65 are a good target audience. Many have ridden at some point in their life or grew up loving horses. Actual participants seem to fall into the 19 to 35 years range.
- Divide of 'horse people' to non-horse people attending Wilsonville events estimated to be about 50/50
- Participant feedback suggests they like Wilsonville events because the experience at Wilsonville is found to be "serene & peaceful, so beautiful, welcoming, nice and friendly" (cf. LA & elsewhere).
- Event longevity – Country Classic (30 years). Wilsonville events seen as affordable to all.
- Rich Fellers – leading world cup finalist for show jumping lives in Metro area and his name synonymous in the trade with "Wilsonville"
- Wilsonville area is home to Wild Turkey Farm - one of the world's premier warmblood stallion, broadmare and show jumper breeding facilities, with international and national buyers flying into Aurora Airport.
- NW Equine Practitioners (vets/equine health) visit Wilsonville for their convention each year.

- Through presenter’s efforts, Wilsonville events becoming strongly known in Oregon for their ‘hunting’ focus (when better known for its Jumping in the past). And achieving growing success in making hunting more popular. (Given Jumping preferred by the wider audience normally.)
- Also growing reputation for the significant concentration of ‘hunters’ in Oregon.
- Wilsonville now less significant for ‘Jumping’ events and more significant for “Hunting” events
- Local organizers “being savvy to the industry” helps Wilsonville be put on the map, in places like Germany too. Competitors and horse people feel they are coming to a place that ‘gets it’.
- The Oregon Horse Country and Black Beauty Banquet charity fundraising initiatives.
- Opening of ‘Equus’ tackle, saddle and clothing shop in Old Town Square opposite Starbucks.
- Canby also has a big tack trading event twice a year.

Weaknesses:

- Country Classic signature event losing its gloss – lost its shine when vendors and its ‘fair like’ (not just about horses alone) atmosphere were lost.
- Event now limited in number of food and merchandizing vendors permitted
- Numbers have fallen off for Country Classic, but quality remains.
- Now fewer things to do as a consequence
- Events are management and labor intensive
- Hard to get corporate sponsors if people not coming and hard to get people coming if what is offered is only the jumping/hunting itself.
- Insufficient involvement, marketing, support signage and community education/awareness-raising from City of Wilsonville - given significance and identity building value of the shows themselves. Chamber marketing and visitor support also not at level desired.
- Insufficient engagement and ownership over events and the opportunities they present, by wider local Wilsonville community and businesses.
- Wilsonville not the central and only focus of Oregon Horse Country activity and services.
- Chamber of Commerce’s need to service and promote its own members as a priority. Leaving non-members to look to their own tourism marketing.
- Some confusion found over the programs of Oregon Horse Country.
- Some need to educate people over what the horse shows and jumper-hunter events are about to build spectators’ levels of enjoyment. (Something done very successfully with the community in Calgary)

Opportunities:

- Adopt more strenuously and widely the Wilsonville Shows as signature events for Wilsonville.
- Bring the Country Classic event back to its former fame when was known nationally and locally
- Explore using the local equestrian strengths and horses as a distinctive and different symbolic theme for Wilsonville public art and cultural expression – e.g. building further upon the two existing equine public sculptures/art already mounted on pedestals within the Town Center area.
- Foster greater marketing assistance and involvement from the City of Wilsonville and the local DMO in recognition of the many equestrian events’ tourism economic value (hotels, restaurants, shopping and more) and also the local horse industry’s contribution to city identity building.
- Facilitating the reduction of any regulatory or other barriers to building more enticing and enjoyable horse show and horse related and inspired events. International research suggests that these high spending Equine Tourists are seeking “atmosphere”, beautiful natural surroundings, adjacent to riding trails if

possible and ready availability of information, amongst other things. International travelers also want to feel involved with the people and area. (UK Travel Trends research 2005)

- Based on Calgary experience, using smart education and marketing to build wider audience (adults and children) and greater engagement, ownership, enjoyment and interest – particularly amongst the family market and women/girls.
- Capitalize on parents' known interest in show jumping and kids in entertainment options and offshoots. Also build on the merchandizing opportunities.
- Encourage local businesses to embrace and highlight the horse events and their special relationship with and value to Wilsonville, in all ways possible. Making the visitors feel welcome.
- Consider creation of a Memorial Park welcome event to kick off the horse shows season within Wilsonville itself – combining food in the park, horse rides, vendors, tack sales, live music, dancing and more. Possibly making use of heritage barn location,
- Volunteer base when developed and strengthened can become significant support structure, promotional means and 'family' within itself.
- Explore creating, packaging and selling 'Girls Weekends' that offer the horse shows, wine tastings, shopping excursions (Bridgeport/Woodburn), best of local dining/brewpubs and entertainment. Etc.
- Build stronger networking between the hotels, the City and County DMOs, event organizers, key service businesses to determine how to deliver a less fragmented approach to tapping into the equestrian market and better meet its needs and boost local spending.
- To turn a new partnership between the horse event managers and hosts and the City of Wilsonville itself into "a well-oiled machine" with complementary support marketing efforts from Clackamas and Washington Counties.
- As a key next step, developing a partnership between the City, local businesses and key horse industry stakeholders that actively identifies and pursues what is needed and the means to grow the horse tourism industry of Wilsonville.
- The interest developing in innovative products like 'Bed, Bale and Breakfast' establishments.
- Exploration of any riding trail development possibilities including trail head facilities and campgrounds around Wilsonville and its Valley surrounds.

Threats:

- Reduction/restriction of vendors to less than a handful and potential threats from noise complaints (even though in compliance) based on County & State regulations
- Failure to build a broader base of engagement, partnering, ownership and support.
- Failure to provide greater and more effective marketing support and better meet visitor promotion, service and information needs.
- Failure to acknowledge and recognize the distinctive role and place of the horse industry and the multiple existing and well respected horse circuit events, in terms of boosting Wilsonville's identity and reputation.
- Washington State based competition over the events.
- Lack of ready and accurate, helpful visitor information on lodging, dining options and more.
- Lack of easy access to venues and helpful wayfinding and signage.
- Perception of horse shows as only for the wealthy to engage in and enjoy.
- Failure to understand the economic multiplier effects and spending impacts of the equestrian events for the local Wilsonville economy.

* * *

Appendix 9

Arts and Culture Relationship to Community Character & Sense of Place

The following is a valuable Arts and Culture Briefing Paper prepared by the American Planning Association that explores how arts and culture strategies (including public art masterplans) can be used to understand community context, celebrate community character, and ultimately create, reinforce, or enhance a distinctive sense of place. All of which ultimately also has an important bearing on not only community, but tourism appeal and impact. The issues explored possess special value to new and rapidly growing cities.



COMMUNITY CHARACTER

How arts and cultural strategies create, reinforce, and enhance sense of place

Kimberley Hodgson

Arts and culture strategies help to reveal and enhance the underlying identity—the unique meaning, value, and character—of the physical and social form of a community. This identity is reflected through the community's character or sense of place. A community's sense of place is not a static concept; rather, it evolves and develops over time, reflecting the spectrum of social values within and around the community.

In this way, the community character of a city, county, town, or neighborhood can be seen as a story or narrative of a place. Planners and community members can come together to reveal and burnish this narrative through:

- ◆ an articulation of the historic, cultural, economic, and cultural context of the community;
- ◆ a commitment to the reinforcement and enhancement of the community's identity; and
- ◆ the implementation of policies, regulations, and incentives that support and enhance this evolving identity.

Awareness of community identity and character is strengthened by the consideration of all community interests in decision-making processes; the integration of arts and cultural resources with civic visioning programs; and the balancing of the inherent conflicting nature of past, present, and future social values.

ARTS AND CULTURE BRIEFING PAPERS 03

KEYPOINT #1:

Understanding Community Context

KEYPOINT #2:

Reinforcing Sense of Place: Celebrating Community Character

KEYPOINT #3:

Local Implementation Framework

KEYPOINT #4:

Arts and Cultural Programming



American Planning Association

Making Great Communities Happen

Prepared by the American Planning Association, as part of a collaborative project with the RMC Research Corporation and with funding from the Rockefeller Foundation

KEYPOINTS

This brief explores how arts and culture strategies can be used to understand community context, celebrate community character, and ultimately create, reinforce, or enhance sense of place.

Artistic and cultural inventories allow a community to begin to understand the historic, cultural, economic, and social context of a community—an essential foundation for developing and building sense of place.

A creative community vision can continuously evolve and embrace new ideas while balancing the inherent conflicting nature of past, present, and future community values and culture. Such a vision must reinforce and embrace the changing climate, culture, and character of a place.

Preserving and enhancing the local identity, uniqueness, and arts and culture assets of a community require that local decision making, planning processes, policies, and regulations reflect and support community character.

Arts and cultural programming plays an important role in providing education about the historical and cultural context of a community and in providing opportunities for participation in community life through festivals, events and performances, interactive classes and workshops, and a variety of other activities.

Each key point is explored in greater depth on the following pages.

KEYPOINT #1:

Understanding Community Context

Helping a community begin to understand its historic, cultural, economic, and social context is an essential foundation for developing and building sense of place. This context

includes a variety of community characteristics: population, demographic, and linguistic characteristics; physical and natural resources; cultural history; climate; customs; landscape features; design and architectural elements; local educational institutions; and temporary artistic and cultural exhibits, events, and spaces. A comprehensive reading or inventory of place can help a community begin to develop a voice for its narrative.

The urban planning process plays an important role in assisting residents as they inventory and explore their community context. In this way, the planning process provides a grounding mechanism to ensure that the wealth of information latent in the community is revealed, enhanced, and maintained over time. This allows a narrative about the authentic elements of a community's talent to emerge and thrive.

Artistic and cultural inventories allow a community to assess its historic, cultural, economic, and social context. These inventories include the identification, assessment, and mapping of a community's artistic and cultural resources. Conducting such an inventory allows planners to play a role in revealing the creative assets of a community. This role is strengthened by collaboration with other stakeholders, such as artists or representatives from cultural institutions. Arts, cultural, and educational institutions are particularly skilled at capturing these special qualities and helping citizens understand their community through new eyes. An inventory can often be the first step in community character discovery—or a guided visioning exercise that engages residents from all segments of a community's population in an interactive, creative process of developing a vision for the future of the community.

According to the Culture, Creativity, and Communities Program at the Urban Institute, however, traditional cultural inventories conducted by local governments often overlook nontraditional cultural resources, venues, and activities. Cultural inventories typically focus on cataloging the variety of arts and cultural organizations within a community, analyzing aspects of the natural environment (such as natural and archaeological resources), and describing traditional arts and cultural sites such as theaters, galleries, and other performance or exhibition venues. By expanding the scope of a traditional cultural inventory, planners can better explore the wealth of artistic, cultural, and creative opportunities at the municipal and neighborhood levels.

A comprehensive artistic and cultural inventory combines quantitative and qualitative methods and includes a variety of stakeholders—such as artists, residents, and community cultural workers—in community-based participatory research into the artistic, cultural, and creative characteristics of a community or neighborhood. Such a comprehensive inventory may include the following:

- ◆ population and demographic information
- ◆ local social and architectural history
- ◆ languages spoken
- ◆ food culture
- ◆ unique customs
- ◆ current landscape
- ◆ scale of existing buildings (residences, as well as commercial, governmental, and institutional buildings)

- ◆ public spaces
- ◆ transportation infrastructure
- ◆ temporary markets and fairs
- ◆ patterns, colors, and materials of buildings
- ◆ natural resources
- ◆ native plants
- ◆ street, business, and community signage
- ◆ art forms
- ◆ special places
- ◆ local educational institutions (colleges, universities, etc.)
- ◆ arts institutions (museums, theaters, historic homes, etc.)
- ◆ galleries

As one example, the Boston Indicators Project—a partnership among the Boston Foundation, the City of Boston, and the Metropolitan Area Planning Council—explores, measures, and assesses the values, resources, and assets of the city and its residents within the context of civic vitality, cultural life and the arts, the economy, education, the environment, health, housing, public safety, technology, and transportation. The project relies on the interaction and participation of a broad range of stakeholders (from schoolchildren and engaged residents to academic and community-based experts to public officials and policy makers) to achieve its goals and objectives.

In an effort to better understand how Boston's growing ethnically and culturally diverse population—which comprises more than 50 nationalities and ethnicities and more than 100 languages and dialects—is expressing its presence in the city and the region, the project and the Mayor's Office of New Bostonians developed the Greater Boston Cultural Resources Survey. This survey was designed to "assess movement along a continuum of cultural expressions, as groups develop resources to transact their own businesses, move toward reflecting themselves to the larger community, and grow in ways that begin to reshape the cultural landscape of the city."¹ The survey invites residents to share "insider" information about the city's cultural and ethnic heritage, commercial establishments, traditions, resources, and amenities. It asks respondents to share their knowledge about a variety of community activities, places, spaces, events, and resources, such as:

- ◆ religious organizations or places of worship
- ◆ informal gathering spaces (beauty salons, cafés, parks, corners)
- ◆ sports or recreational clubs or teams specific to an ethnic or cultural community
- ◆ social or cultural clubs
- ◆ restaurants, grocery stores, or specialty stores that serve or sell products specific to an ethnic or cultural community
- ◆ arts and cultural venues or public art that celebrate a specific ethnic or cultural heritage
- ◆ nonprofit organizations that serve a specific ethnic or cultural community
- ◆ festivals or parades that express or celebrate the heritage or the presence of an ethnic or cultural community
- ◆ places where people can purchase books or music relating to an ethnic or cultural community
- ◆ major institutions or parks that celebrate the cultural heritage of an ethnic or cultural community
- ◆ books, websites, or tours that speak to or about an ethnic or cultural community²

KEYPOINT #2:

Reinforcing Sense of Place: Celebrating Community Character

While an inventory of place provides the initial context for building sense of place and establishing community identity, the combination of context and the reinforcement of the current climate and cul-

ture of a place create community character or identity. Reinforcing sense of place therefore requires first a comprehensive understanding of a community's historic, cultural, economic, and social context, and second a vision for the future that continuously evolves and embraces new ideas while balancing the inherent conflicting nature of past, present, and future community values and culture.

Community character is something a community has inherently, not something that can be applied like makeup. It is conveyed by not only grand buildings and public spaces but a whole range of urban elements: residences of all sizes and scale; commercial, government, and institutional buildings; street cross-sections; street furniture and graphics; public places, large and small; ceremonial buildings; informal activities such as street markets and fairs; and the food, language, and personalities that contribute to a community's narrative. Only through the understanding and reinforcement of its character can a community flourish civically and economically. Planners are uniquely qualified to guide citizens in this process of discovery and celebration of community character.

Ybor City—the Latin Quarter of Tampa, Florida—is known as a center of the cigar industry but also as a vibrant, multicultural melting pot. In the 19th and early 20th centuries, Ybor City was home to more than 230 cigar factories, as well as many Spanish, Cuban, African, Italian, German, and Jewish immigrants. During the 1950s and 1960s, federal urban-renewal efforts aimed at slum clearance and interstate freeway construction disfigured Ybor City. The preservation of architectural and streetscape features that indicate the neighborhood’s multiethnic heritage—second-floor balconies, ornate cornice and tile designs, five-globe street lamps, wide sidewalks of hex-shaped pavers, decorative shop windows, wrought-iron benches, and ornate curlicue light fixtures—is due in large part to the work of the Barrio Latino Commission, Tampa’s first architectural review commission, created in 1959. The 1983 Ybor City Historic District Revitalization Plan resulted in more than \$12 million in private investment to revitalize the neighborhood. The City of Tampa relaxed the district’s zoning laws to permit nighttime uses, such as bars and clubs, to attract tourists and visitors. While these efforts worked as stimulants for economic development, Ybor City quickly became a popular entertainment district, attracting a young, rowdy crowd at night but very few people during the day. Through community involvement—as well as the collaboration of a variety of institutions, including the local development corporation, the city planning office, and the historic district—Ybor City is once again experiencing a wave of revitalization efforts. With the introduction of the Tampa Electric Company streetcar line, the revitalization of historic buildings, new infill housing to the north and south of the historic core, and a variety of new businesses and restaurants, Ybor City continues to balance its multiethnic heritage with the goals and needs of current residents. The 2004 Ybor City Vision Plan continues to guide the area’s redevelopment efforts. In 2008, Seventh Avenue in the heart of Ybor City was selected as one of American Planning Association’s Great Streets in America on account of its history, character, and evidence of strong community involvement.³

KEYPOINT #3:

Local Implementation Framework

Artistic and cultural inventories, community visioning processes, arts and culture programming, master plans, and public financial investment in urban design and placemaking are important elements of an overall strategy that plan-

ners can use to explore community context, embrace and nurture community diversity and uniqueness, and build upon and celebrate community character.

Preserving and enhancing the local identity, uniqueness, and arts and culture assets of a community require that local decision making, planning processes, policies, and regulations reflect and support this community character. Local government programs, policies, and regulations that incorporate the underlying philosophy or identity of a community can provide a framework for decision making, encourage development that is place based, and reinforce the cultural goals and vision of a community. This framework supports the work of civic leaders and community advocates and can help bring new allies, talent, and ideas into the planning process.

Public Art Master Plans

Public art—such as memorials, historical monuments, installations, murals, sculptures, mosaics, decorative features, and functional elements—is an important element in placemaking. Unlike art in private spaces, public art is ideally site-specific and attuned to its social, economic, and environmental context. Public art can contribute to urban design and the revitalization of civic infrastructure; enhance and personalize public space; comment on environmental and social conditions; and activate civic dialogue.

The development and adoption of a public art master plan provides an opportunity to establish a shared vision for a community’s public realm and to coordinate the activities of multiple stakeholders—planners, artists, arts and culture-related nonprofit organizations, and other stakeholders—in shaping that realm. More and more communities are developing and adopting public art master plans for the purpose of demonstrating a long-term commitment to the central importance of public art in the planning, design, and creation of public space.

In 1988, the City of Phoenix adopted the first city-wide public art plan in the country. Public Art Plan for Phoenix: Ideas and Visions gave the city a “clear vision and path for public art to become an effective tool of urban design.” Since the adoption of this innovative plan and its revision in 2006, public art has played an important role in shaping the city. The original plan identified working zones and opportunities to strengthen the design of the city through more than 70 public art projects related to the design and construction of buildings, outdoor urban spaces and networks, and infrastructure. The plan update built upon the original vision by addressing the need to “strengthen creative partnerships with the public and private sector; improve the sustainability of projects and initiatives; cluster projects to maximize public benefit; and improve the care and maintenance of the city’s public art collection.

In another effort to recognize and commemorate a place’s history and legacy, the Durham, North Carolina, Office of Economic and Workforce Development and the Parrish Street Advocacy Group partnered to develop the 2008 Plan for Public Art on Parrish Street. The plan builds upon the Durham Cultural Master Plan, the Downtown Master Plan, and additional public and private planning projects. Through public art, it addresses the need to catalyze economic development activity while celebrating the story of African American entrepreneurship, empowerment, and economic innovation on Parrish Street, which in the early 20th century was known locally as “Black Wall Street.” The plan “establishes a bold direction in which many types of art form the epicenter of downtown while their execution honors successful public art processes, urban land use planning structures, and landscape design strategies for artistic consideration.”⁴

Another example comes from Arlington County, Virginia, which is committed to “encouraging excellence in the design of public buildings, parks, streets and infrastructure.” The county “recognizes that public art, along with architecture, landscape architecture, urban design, graphic design, and historic preservation, is one of several tools the County can use” to create “strong, meaningful connections between people and places.” Since 2000, the Arlington County Board has supported public art as a tool for promoting “design excellence” and a “high-quality public realm.” In September 2000 and December 2004, the county board adopted a public art policy and public art master plan, respectively. The public art policy established the board’s commitment to public art, while the plan outlined a strategy for commissioning art projects and provided details on priorities, locations, and themes for those projects. The plan also established goals to integrate art with architectural, landscape, and infrastructure design of capital projects; to coordinate the efforts of various county departments, commissions, and residents to identify and implement public art projects; and to focus staff time and financial resources on projects with the strongest placemaking impact.⁵

Public Investment in Urban Infrastructure

The design of urban infrastructure, such as architecture, streetscapes, transportation facilities, and so on, presents an opportunity to interpret the many constituent elements of a sense of place: the natural environment, history, culture, language, and other aspects of local environmental, economic, and social conditions. Through the development of creative streetscape design, transit facilities, street signage, and other infrastructure, artists can inform, educate, and comment on these local conditions.

For example, through investment in the integration of public art in water and sewer infrastructure, the City of Calgary, Alberta, provides essential services to residents while also enhancing sense of place. The city takes pride in the intact ecosystem of the Bow River, which flows through the city and provides residents with a sustainable source of drinking water, recreational opportunities, and world-class trout fishing. As a result, the city’s Council and Department

of Utilities and Environmental Protection (UEP) created a Public Art Plan for the Expressive Potential of Utility Infrastructure to engage artists in utilizing public art to raise awareness of water as a critical and finite resource, foster environmental stewardship, and continuously engage residents in education about UEP services, infrastructure, and the surrounding watershed. The plan outlines how the city can integrate public art into its utilities and environmental systems to map the relationship between the man-made and natural watershed of the Bow River. The plan creates a “conceptual framework and visual tone for how UEP wants citizens to recognize and respond to its infrastructure.” This plan reveals the “untapped potential” of infrastructure as a unique, artistic, and cultural asset to the community and lays the foundation for realizing infrastructure’s expressive potential.⁶

From Austin, Texas; Portland, Oregon; and New York City to Louisville, Kentucky; Sioux Falls, South Dakota; and Mount Clemens, Michigan, cities and towns across the country are combining the utility with aesthetics by allowing local artists to design and sculpt innovative and creative bicycle racks. These racks not only provide bicycle parking but also draw attention to bicycle parking as an important element of street furniture. Combined with other aesthetically pleasing street furniture, artistic bicycle racks create an interesting environment for residents and tourists and enhance the character of a place.

Philadelphia’s Avenue of the Arts is a classic case study of how public and private investment in arts and cultural programming and development can assist in overcoming a variety of economic, social, and physical challenges. More than \$100 million in public funds and \$1 billion in private funds transformed South Broad Street from a declining street into a vibrant corridor that embraces its heritage and provides a home for 23 arts organizations, three major art institutions, three large hotels, more than 20 high-end retailers, more than 30 restaurants, and 1,450 residential units either converted from vacant office buildings or newly constructed.

Efforts to revitalize South Broad Street began in 1978 with the exhibit *Broad Street Comes Alive*, sponsored by the Philadelphia Art Alliance, which showcased a vision for transforming the street. However, implementation did not begin until the early 1990s. By 1993, the arts organizations, the business community, and the city reached a consensus that Broad Street would require significant public investment for revitalization. With the support of Mayor Ed Rendell, redevelopment efforts finally started. Improvements included the installment of vintage lampposts, sidewalk pavers, planters, bus shelters, and decorative subway entrances. Wide sidewalks accommodated outdoor seating, and mixed use developments provide ample space for street-level retail and restaurants along with a mixture of office and residential space on upper floors. The board and staff of the Avenue of the Arts, Inc. maintain the revitalization efforts and plan a variety of events and programs—such as festivals, parades, recreational activities, temporary and permanent art exhibits, and performances—in collaboration with the arts organizations, retailers, specialty shops, and community and educational institutions along the avenue.⁷ According to an economic impact study conducted in September 2007 by Econsult, in 2006 the avenue generated an estimated \$424 million, with an estimated \$150 million in total earnings, supporting approximately 6,000 jobs.

KEYPOINT #4:

Arts and Cultural Programming

Arts and cultural programming provides education about the historical and cultural context of a community and opportunities for participation in community life through festivals, events and performances, interactive

classes and workshops, and a variety of other activities. Programming initiates conversation about arts and culture and establishes a structure of happenings and plans that ensure that these activities will continue to flourish. This deliberate continuity will help strengthen creative ideas, inspire citizens, and offer hope that opportunities exist and matter to the community. This increases the likelihood of not only the implementation of arts programs but also their integration with other community plans.

Seattle's Office of Arts and Cultural Affairs has established two programs that support community character through financial assistance and programming: the Neighborhood and Community Arts (NCA) Program and a small awards initiative (smART ventures) that invests in community-based arts and culture programs. NCA provides support to neighborhood groups that "produce recurring festivals and events that promote arts and cultural participation, build community and enhance the visibility of neighborhoods through arts and culture."⁸ By contrast, smART ventures provides small, one-time financial assistance to "spark innova-

tive ideas and widen arts and cultural participation, particularly among diverse and underserved communities." For example, in 2008, a smART ventures grant provided funding to filmmakers Melissa Young and Mark Dworkin to provide free screenings of their documentary *Good Food*, which explores the meaning of good food and its value to healthy communities.⁹

Another example is City Arts, a nonprofit arts organization based in Washington, D.C., which engages residents in the development of artworks that reflect neighborhood history and culture, provides paid apprenticeships to talented youth artists, and offers arts education to a range of age groups. At the beginning of an artworks project, student apprentices connect with neighborhood leaders, civic groups, and residents to generate ideas for images to include in the artwork. This input makes it more likely that the artwork will pay tribute to the neighborhood's history, present, and future.¹⁰ For example, a Duke Ellington mural, installed in 1997 and expanded in 2004, "contributed to the transformation of the U Street NW corridor into a lively arts and entertainment district." According to City Arts, the mural contributes to the "visual integrity of the streetscape" and instills a "sense of pride in the residents of the neighborhood."¹¹

This briefing paper was written by Jeff Soule, FAICP (APA's director of outreach and international programs), Kimberley Hodgson, AICP (manager of APA's Planning & Community Health Research Center), and Kelly Ann Beavers (PhD candidate, Virginia Tech, and APA arts and culture intern).

Endnotes

1. See www.tbf.org/indicators2004/culturallife.
2. See www.tbf.org/SelectSurvey/TakeSurvey.asp?SurveyID=3M09p4Klm753G
3. See www.planning.org/greatplaces/streets/2008/7thavenue.htm; and www.tampagov.net/dept_ybor_city_development_corporation/information_resources/2005_vision.asp.
4. See www.durhamnc.gov/departments/eed/parrish/p_advocacy.cfm.
5. See www.arlingtonva.us/departments/ParksRecreation/scripts/culture/ParksRecreationScriptsCulturePublicArtPlan.aspx.
6. See www.calgary.ca/docgallery/bu/recreation/public_art/uep_public_art_plan.pdf.
7. See www.planning.org/greatplaces/streets/2008/southbroadstreet.htm and www.avenueofthearts.org.
8. See www.seattle.gov/arts/funding/neighborhood_community.asp.
9. See www.seattle.gov/arts/funding/smart_ventures_featured.asp.
10. See cityartsdc.org/documents/CityArtsbrochure.pdf.
11. See www.cityartsdc.org/about.

Arts and Culture Briefing Papers

This is one in a series of briefing papers on how planners can work with partners in the arts and culture sector and use creative strategies to achieve economic, social, environmental, and community goals.

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Appendix 10

Public Submissions

The following are written submissions that have been received from citizens during the Assessment phase of the project.

THOUGHTS ON INCREASING WILSONVILLE TOURISM

In the few minutes I had to respond to the on-line survey about how to increase tourism and such in the City of Wilsonville were not adequate for the job that needed to be done. Herein, I offer a few more thoughts.

1. It seems that there two groups that are being considered here – “tourists” and “conventions”.
2. These two groups are not completely identical in there needs from Wilsonville, although there is some overlap.
3. I think that there is a lot that can be done to attract tourists, and potentially conventions but the latter is going to require some true effort.
4. In terms of the conventions – the first thing that we’d need is simply put – a place to have them. The Holiday Inn is currently the only place even semi-equipped with a large, open “ball room”, break out rooms, hotel rooms, parking, etc. However, the impression I happen to have is that in looking at attracting conventions to Wilsonville, we are probably looking at something larger than what can be handled by The Holiday Inn.
5. If something larger is needed than the Holiday Inn, maybe we need to look at the development of some kind “convention center”. However, I have concern that a city of only 20,000 population may or may not be able to attract enough of them to justify a whole complex solely for that purpose and make it cost effective/self-supporting and therein not a drain on City capital.
6. If it needs to be combined to make it feasible, a look at other needed additions to our City need to be examined. The first thing that come to mind is the need for a performing arts center – for concerts music festivals, drama productions (high school, community, other), and maybe an actual arts gallery for local students and local artisans from throughout the region. A performing arts center has already been identified as a need for Wilsonville. Another function of such a center would be to provide an indoor place for Wilsonville High School graduations without having to go out of the area for a facility in which to hold the ceremonies.
 - A small ‘artist colony’ could even be developed in a nearby facility to help draw even more of this travel dollar. This could be a warehouse, maybe with apartment units artists could rent & live in while producing their art work. The center could then be a display venue for them along with student and other works.

7. An additional feature of this Center to help make it further viable and to maybe open more pots for development money and to draw even more visitors/tourists to Wilsonville, would be a third feature of the complex – a Willamette River Discovery Center (similar in quality to the discovery center in the little town (4,111 population) of Reedsport, Oregon. A Willamette River Discovery Center could have a variety of different 'wings': 1) Missoula Flood, 2) Kallapoia Indians/Native Americans of the region, 3) Lewis & Clark; 4) Oregon Trail; 5) the various cultural groups settling the area – the French, the Germans, etc. 6) The beginning of the Oregon Territory/statehood, 7) local agri-tours today, the nursery industry, wine tasting, filbert growing, and equestrian industries of today, etc. 8) Portland – today/industry, transportation, parks system, the City in general, and a showpiece for current day Wilsonville, etc. Wilsonville is the entering doorway to the entire Metro area from the south – an ideal location for a full discovery center.

--- Between the discovery center drawing passing travelers in ... the performing arts center bringing in locals and more for various arts & performances & programs ... and then drawing what conventions a small town can really expect to compete in getting, ... the combination may well be dynamic enough to become self-supporting and totally viable.

--- For discussion purposes here, I'll call this complex The Wilsonville Center

8. The Wilsonville Center would need to be in a good location – primarily the ease of access from the freeway. The property that Cabellas was looking at would be ideal in location and probably size to handle the complex building itself, adequate parking, etc. This location would be good, too, from the perspective that it already has at least a small variety of restaurants and services already established that could expect to pick up a fair amount of business with the development of the Center. It also has room for the concurrent development of further hotel facilities to fill the expected need, and other businesses

-- This location would have the positive effect of encouraging the economic fill-in of the area between the current 'downtown' Wilsonville and North Wilsonville.

9. The City would have to do some strategic planning for that whole North Wilsonville area to encourage appropriate development in the area – including circulation patterns, new streets, street lighting, trees, etc.

10. It might be good to attract a major hotel to support the Center – such as an Embassy Suites Wilsonville, right next door to help add a level of class and respectability to the 'new convention' option. (Eugene has a great downtown symphony hall with a major hotel and parking structure both attached – this could be similar)

OTHER THOUGHTS ABOUT ATTRACTING TOURISTS

1. If Wilsonville really wants to go in this direction, maybe it needs an 'all-out-effort' in this direction to make it work, and to make it worth while. What I'm referring to is get the entire City behind the concept and work with it across the entire City. Maybe not to this extent, but I'd refer you to the Bavarian Village of Leavenworth in north central Washington State. Their situation was, frankly, a bleak dynamic – their town was dying. The Northern Pacific Railroad had moved out and down to Wenatchee. The Forest Service did the same thing. And there frankly wasn't much left to call a town. A local business man convinced the City Fathers to convert the downtown core to a Bavarian motif. He had done so with his restaurant some miles on up the Steven's Pas Highway and had really turned it around, so he encouraged them to convert the entire City into a Bavarian Village. They did, and it is now one of the top tourist attractions in the entire State.

This might be a bit of an extreme example which Wilsonville wouldn't have to go to that kind of effort, but the development of some kind of central theme for the City that would be carried out throughout. One quick example would be to leave the 'winter' tree lights on the trees down Wilsonville Road up all year – maybe expand such decorations, and develop a theme of "Wilsonville – The City of Lights." Another thought could be developing a transportation theme – since that is the basis of how Wilsonville got started in the first place. We've got the freeway, MAX, SMART, good roads/streets, the Bicycle-Pedestrian Bridge coming on, the new car museum coming in 2014, the air port only five miles away. Surely, some good mileage could be made out of all that!

But the development of a central theme could most likely be of huge benefit.

2. A shuttle van service (described elsewhere) circulation between all area hotels and area sites would be a huge asset to both convention goers as well as tourists.

3. A shuttle service could also be developed for convention goers between the Portland Airport and Wilsonville hotels (If Eugene and other southern Willamette Valley cities have them already, it certainly could be an asset to local hotels and a definite assistance to convention efforts.

4. Maybe SMART could '*earn some money*' by providing a contract bus shuttle program for conventions organizers to offer their attendees to take in Portland sights.

5. To really attract tourists and conventions, Wilsonville needs to develop more reasons to come to Wilsonville. Right now it is really just a nice little City to live in, but there really isn't much to draw tourists with.

-- To really encourage tourists, Wilsonville needs maybe three more options along the line of the new car museum. The Bicycle-Pedestrian Bridge will begin to draw

a lot of attention, tourists, bicycle tourists, event participants and their families and the media. Two more besides that would make a great asset.

-- The development of a number of the potential Events listed on-line at the www.FrenchPrairieBridge.org site and under "APPENDIX" to the "Thoughts About Wilsonville's Bicycle-Pedestrian Bridge, could easily be a third attraction.

-- The fourth attraction could be the Wilsonville Center (Discovery Center with connecting Performing Arts Center & convention center (and anchor hotel).

6. Need to have a Wilsonville booklet in every local hotel room – like the booklets in resorts that list the local attractions, sites, options, recreational outlets, businesses, phone numbers, coupons for local businesses, year-round advertising the local events (Fun in the Sun, Art in the Park, the summer equestrian events to the west, etc.)

7. The proposed SMART Bus extension into Downtown Portland could help shuttle folks from the Portland International Airport with only one transfer all the way to their Wilsonville hotel (if the shuttle were set up to stop at local hotels on this end).

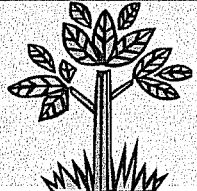
-- The Salem SMART Bus could be used to shuttle folks from down there up to Wilsonville – which could eventually include a stop at the Aurora Airport if it is developed to fly people into that want to come to Wilsonville conventions.

One Suggestion for Needed Tourism Infrastructure in Wilsonville

By Steve Van Wechel
10/21/2013

When people/families come to Wilsonville, they don't know where to go, what is available, where amenities are (restaurants, shopping, sights, etc.) If they do, there is the problem of having to drive somewhere they hope they know where to go, and how to find their way back. That also doesn't leave much encouragement to explore the rest of what Wilsonville has to offer. Thus, like many other cities (and even individual resorts) a shuttle service circulating between area features with stops at all area hotels would be a HUGE bonus to people as they come here. Businessmen coming for conventions could bring their families and the families could have some freedom to explore the sights and the area in complete safety and comfort. It would provide economical transportation to shopping, recreation, area events, grocery/restaurants, museums, historical sites, scenic drives, regional transportation options, and more. As a traditional 'jump-off/jump on system, it would be an ideal way to show off the City/area, and provide easy access to all its amenities!

**Following is a list of Wilsonville's TOP 27 Tourist Sites that could be included in a shuttle service.
After that are some various comments about the Service**

 (not listed in any specific order)		Stops/Tour	Drop-Off/Pick up Later	Drive Through/By	Historical	Entertainment	Options Exercise/Open	Space Options	Sightseeing	Connection to Other Transportation
Pick up/drop off at all 8 area hotels										
1	Old Town Historical Sights/plaques	X		X	X					
2	Bicycle-Pedestrian Bridge	X			X		X	X		
3	Old Town Commercial Section (shopping, restaurants, grocery, etc.)		X							
4	World of Speed Car Museum		X		X	X				
5	Graham Oaks / Heritage Tree (nature, jogging/exercise, open space)	X	X		X		X			
6	Villaboix			X				X		
7	Mangess Tree Farm (World Forestry Center site)	X	X		X		X			
8	WES Train Station /regional transportation conx)		X	X						X
9	Beauty & the Bridge	X						X		
10	Stein-Boozier Barn/Murase Plaza	X	X		X		X	X		
11	Murase Plaza/Water feature/library's wood sculpture	X						X		
12	Theater / Fun Center Wilsonville Bowling Lanes		X			X				
13	Seriously Cup Cakes (for included free cup cake)	X								
14	Korean War Memorial	X			X			X		
15	Wilsonville High School (a little bragging!!)			X				X		
16	Oregon Tech/Pioneer University/Microsoft			X				X		
17	Frog Pond area (next area of development)			X				X		
18	Out Homesteader Road			X				X		
19	San-d-Lee Golf Course		X			X	X			
20	South on Mountain Road to Canby Ferry	X			X			X		
21	Swan Island Dahlias (and/or area nurseries)	X	X							
22	Aurora Airport	X		X						X
23	Langdon Farm Golf Course/Restaurant		X			X	X			
24	Charbonneau Country Club		X			X	X			
25	Seasonally take in the Equestrian Shows		X	X		X				
26	Seasonally take in various other local events/celebrations (Fun in the Sun, Art in the Park, Summer Concerts/Movies in the Park, etc)		X	X		X				
27	Seasonally take in local major sports tournaments		X	X		X				

Bus Shuttle Comments

1	The program will probably start with like two vans (rather than buses)
2	If all 27 sites are used, the program will probably start with two vans operating at once (with one for backup)
3	Funding could come from a variety of sources: 1) each hotel offering this service to their customers will pay \$200 a month for the service to their door (equivalent of 2-3 rooms a month extra BECAUSE of the service; 2) City would provide 1 full time/year round driver, and maintenance on vehicles; 3) Clackamas Count Tourism needs to kick in some on this. 4) If a stop in Canby is arranged, they should toss some in; 5) customers could pay like \$5.00 for an all-day pass on the system.
4	The buses could be initially provided via grants and/or donation from local "car shops".
5	During October to March, maybe there would only be one shuttle rather than two
6	A \$5.00 fare (\$3.00 kids) includes an all-day pass on the system - can jump on and off as desired, and a coupon for one free cup cake (possible seasonal addition would be a single cut flower from a flower farm for the tourist hotel room as compliments for the City.
7	Families along Homesteader Road and Mountain Road (other people on other nearby roads could walk over) could pay a fare and catch a ride into town/back if desired.
8	It will have to be understood that the first couple years of this program, local residents will probably be asking why are these EMPTY vans running around all the time. There will just have to be an educational period to get the program known to tourists, and to get locals to know that is will simply take a while to get this up and running.
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10	
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12	
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15	

Aurora Colony Visitors Association
P.O. Box 86 Aurora, Oregon 97002
(503)939-0312 www.auroracolony.com

October 13, 2013

Mark Ottenad
Public/Government Affairs Director
City of Wilsonville
29799 SW Town Center Loop East
Wilsonville, OR 97070

Tourism Strategy Development Community Workshops

Dear Mark and Friends,

The Aurora Colony Visitors Association is very interested in continuing our established relationship with the Wilsonville Chamber of Commerce and building upon that to strengthen tourism in our area through the interest and actions of the city of Wilsonville. Thank you for your recent invitation to be part of the discussion on how this can be achieved. I am including some information on our group and our destination because we believe it is important that the city of Wilsonville understands just what is “in the neighborhood” and how that might benefit both cities.

What is the Aurora Colony Visitors Association?

The Aurora Colony Visitors Association (ACVA) replaced the Aurora Area Chamber of Commerce several years ago after the chamber was sued over a trip/fall accident at our annual Aurora Colony Days celebration. (Although our insurance covered the claim, the subsequent rate hike made the continuation of the organization difficult.) The new organization was successfully formed with the sole purpose of marketing the area as a tourism destination. We have an annual membership of around 40 businesses including Aurora’s retail businesses, restaurants, The Old Aurora Colony Museum, local nurseries, wineries, and the major floral-festival farms in the North Willamette Valley. The ACVA is a reciprocal member of the Wilsonville Chamber of Commerce.

The ACVA is not the same as the Old Aurora Colony Museum/Aurora Colony Historical Society. We are members of each other’s organizations and ACVA represents them as part of our group, but we are different groups with different missions. In addition to collecting a basic annual dues (\$85) from our members, ACVA also collects dedicated funds for specific marketing products.. These include color brochure map/guide, color rack cards and distribution programs, freeway signage, paid advertising in *The Oregonian* and other projects that may come up. We have no office or staff and do all of our work through volunteers. Our most active group is our marketing committee

which plans several annual promotional events. This is in addition to the museum's 5-6 major annual events resulting in some event almost every month in Aurora!

How We Marketed Aurora as a Destination

Between 2006-7, our group met several times for strategic planning sessions where we refined our marketing. Prior to that we ran massive (and expensive!) local campaigns in *The Oregonian* over a period of about ten years, establishing Aurora as a prime shopping destination for antiques and vintage décor. This proved to be highly successful and brought the Portland Metro area into our downtown every weekend. Previous to that, Aurora had been a national antiques destination with a fairly successful year-round tourist business known as "Antiques Capital of Oregon." Much like your 2011 analysis of Wilsonville's strengths and weaknesses, we also identified our strengths and challenges.

We Identified these Keys to Successful Tourism Destinations

1. Location and accessibility
2. The Hook – what makes us unique?
3. Retail shopping opportunities
4. An organized business structure offering marketing and visitor services
5. Food and lodging options
6. Infrastructure and amenities

Our projects and products have refined each category by actions over the last few years.

1. Location and Accessibility

Aurora is well located exactly half way between Portland and Salem on Hwy 99E and just 2 miles off I-5 with a direct eastbound exit #278. While we have had a national historic designation sign for many years at this exit (\$1000 annual cost) we finally won approval with OTE (previously the Oregon Travel Information Council) for the blue attraction signage with AURORA ANTIQUES DISTRICT signs at this exit as well. (\$2500 initial investment with \$1400 annual rent.) For about three years we also had a OTIC color ad panel and brochure at the southbound Baldock Rest Area. The blue attraction signs are highly successful in bringing visitors to Aurora.

2. The Hook

For Aurora, this was the easy part. Aurora is Oregon's first national historic district, the home of the Aurora Colony, the only successful communal society in 19th century Western America. With over 18,000 acres in this area, the Aurora group was a major force in early Oregon, settling here in 1856, before statehood. With their distinctive East Coast style architecture – the largest group of this type in the West, the additional cultural artifacts and recorded history made available to the 1963 founding of the Aurora Colony Historical Society has made the museum and its substantial educational programs a model of high quality, authentic interpretation. It is considered a national treasure.

Beginning in the 1950's some of the first antiques stores began to find homes in Aurora's fairly derelict buildings. While other communities were building, Aurora had been tearing down since Highway 99E was pushed through the center grid of this New England style town in the early 1930's, destroying what would now be championed but was then just a matter of salvaging what one could. Shortly after the historical society

was formed, a national campaign to recognize important communities was born and Aurora's historical society and the city of Aurora worked to become an early national historic district. By the 1970's, the town had attracted knowledgeable antiques dealers from California who brought quality antiques and old fashioned retail flair, making this tourism destination with old fashioned restaurants and the first big museum events.

Today, Aurora has been listed in the top 8 antiques shopping destinations by travelchannel.com for the last three years and by MSNBC.com as one of the top 10 national antiques towns.

3. Shopping Opportunities

Travelers want opportunities to shop, or at least window shop. Aurora has provided that in addition to its heritage feature.

The antiques industry has continued to ebb and flow over the years but Aurora has maintained its preeminence by encouraging additional antiques businesses to locate here. Contrary to the "competition" of like-business, this focus has created a mecca for those wanting a particular category of product, not only collectors and decorators but a traditional tourist affection for quaint historical areas with antiques shops, galleries and eateries. Important retail trade shows such as the Palmer-Wirfs Expo antiques shows have brought thousands of shoppers to Portland over the last 20+ years, always making Aurora part of their stop. Young, hip international antiques shoppers from Japan continue to find Aurora a top shopping destination.

Unlike many other destinations, Aurora has had to market to both travelers and our local/regional prospects. We have no established "season" due to our excellent location off busy I-5. We are only 20 minutes from both Portland and Salem with even closer shopping distance from Portland's suburban areas, what we have termed the "rich underbelly" of Portland. The marketing, therefore, has been expensive for our little businesses so it is with their sacrifices that both daily and weekend business has been able to sustain us during these particularly difficult economic times. In 2009 we literally promised each other that we would "open our doors each day, no matter what". Recognizing that some of the best traveling purchasers are those that have come to visit Oregon friends and relatives, stretching their available spending power, we continue to market Aurora locally as a place to bring guests.

Aurora's current in-town tourism businesses and attractions consist of:

- The Old Aurora Colony Museum, a five-building complex with grounds
- 15 antiques stores including a massive architectural salvage business, antique lighting store and several substantial antiques malls
- 1 antiques auction house
- 2 fiber arts businesses (weaving, spinning, knitting)
- 3 gift/décor/ living history shops
- 4 restaurant/eateries including a bakery and a pub
- 3 art/craft gallery or gallery spaces in other shops
- 1 hazelnut candy factory with retail store

1 winery tasting room with monthly evening events

Local retail businesses which are outside the city and are marketed with Aurora:

1 bed and breakfast

2 retail nurseries

2 wineries, 1 vineyard

4 agritourism farms: Fir Point Farms, Wooden Shoe Tulip Farm, Heirloom
Roses, Swan Island Dahlias

4. An Organized Structure of Businesses to Market the Destination and Provide Visitor Services

Our ACVA was organized to be able to collect funds for the purpose of marketing the Aurora area as a destination. Several marketing products are funded annually in addition to the previously mentioned freeway signage:

- Full color 8 panel visitors guide with map, brief history, events and ads (entirely supported by ads) 15,000 annually which is distributed around the state and used in town for shoppers.
- Color rack cards and their distribution, 20,000 per year. 2012 in Portland Metro, 2013 North Oregon Coast
- Website www.auroracolony.com is very active particularly with search words antiques, historic. Our opening home page is a constantly updated calendar of new pictures and short list of what is currently happening with links to business blogs, keeping things fresh and interesting. The website has a page just for the year's calendar as well as links to all ACVA members and area chambers, including Wilsonville.
- *The Oregonian*. We continue, on a smaller scale, to regularly advertise in Saturday morning's *Homes & Gardens* tab one to two times a month with a full color ad announcing events, seasonal shopping hooks, etc.
- As a group, the ACVA also plans promotional events and often markets them on social network sites such as Groupon. This is bringing a whole new clientele to the town who we believe would not discover Aurora on its own.

Individually, shops are engaged in their own marketing and advertising and are encouraged to always mention the whole destination in their internet access such as Craigslist, blogs, etc. This has led to much attention by the press who rarely visit a site anymore, relying on whatever they can find online to do their heavy lifting. As a result, Aurora has been listed in many magazines and news stories, both in print and online.

Aurora is also currently benefiting from author Jane Kirkpatrick's three novels on an Aurora colony person, Emma Giesy, who is the central character. Over the last few years the popularity of these books has brought significant numbers of travelers to Aurora, now at 25% of the museum's walk-ins. The success of the books has led publisher Random House to mass-market all three novels under one cover this fall. The book will be titled *Emma of Aurora*, the first time that "Aurora" will be on the cover. Prior to this news, the ACVA and historical society received a grant from Marion County's granting body of the Oregon Cultural Trust to develop the *Walk with Emma* self-guided walking tour of the historic downtown. That tour is now complete with a multipanel color map brochure and

related signage. Our next stage is to develop a mobile phone tour to reduce printing costs to keep the tour sustainable. (Our first 4000 copies went in just five months.)

5. Food and Lodging Options

Aurora currently has no in-town lodging and only four eateries. Of the restaurants, only one, the Colony Pub, is full service. A popular b&b in town was recently sold as a residence. There is an excellent small b&b just west of the truck stop on Butteville Road, The Feller House, but we rely on Wilsonville's excellent lodging opportunities as well as your full service restaurants. We are routinely asked for lunch areas that would seat tour groups which proves to be difficult here.

This is a weakness for Aurora but one that certainly is an advantage for Wilsonville if the city would explore ways that our messages might intersect. For instance, online website links as well as some printed material for restaurants and lodging might be displayed in Aurora at our central kiosk and at the shops. And Aurora would greatly benefit from having our brochures at Wilsonville motels.

6. Infrastructure and Amenities

Over a period of several years, the city of Aurora has added to the destination by developing an excellent pedestrian hardscape in spite of the challenge of Hwy 99E splitting the town in two. Under the Pedestrian/Bicycle program, ODOT awarded Aurora substantial grants to complete sidewalks and bicycle lanes throughout the downtown. Other grants to develop the city's Downtown Improvement Plan were awarded from the Mid-Willamette Valley Council of Governments for rural funds economic development and a Marion County/City of Aurora roadway improvement plan. These amounted to over a million dollars in improvements in the last decade. The former chamber of commerce, historical society, city and Marion county also combined funds to build a free-standing public restroom in the center of the downtown which the city maintains. This, as much as any single amenity, is more than larger cities can boast and makes a substantial impact in how long a visitor will stay in town.

Aurora and Wilsonville

While this has been a very long and detailed look at what makes Aurora's destination tick, we hope that it has provided useful information for those in Wilsonville who are looking at ways to expand its tourism sector. We are each capable of enhancing the visiting experience of the other. Wilsonville is well positioned to act as "the inn" for many of us who are clearly recreational and who are situated around it.

Thank you for this opportunity!

Yours truly,
Karen Townsend
Marketing Director
Aurora Colony Visitors Association
(503)939-0312 karen@auroracolony.com

WILSONVILLE

AREA CHAMBER OF COMMERCE

A South Metro Business Advocate

The Future of Wilsonville Tourism

Jennifer Johnson, Chamber Tourism & VC Manager

Wilsonville is approaching a new era in its direction and responsibility with regards to tourism. Discussions have begun and there are realities the community cannot escape. Change is inevitable, technology is the future and the expectations are evolving.

It is with this in mind that I wanted to write to the Chamber, City and County in regards to an updated vision for tourism in Wilsonville regardless of whether or not I am able to play a part.

The ideas in the updated 2013 Tourism Action Plan are not only my own, but those of our entire Hospitality and Tourism Committee which recently met and decided what we wanted for Wilsonville Tourism in the future. These decisions were made as business owners and tourism professionals from lodging, farming, attractions and many other tourism dependent industries.

The Tourism Action Plan 2013 highlights are as follows:

Where should we focus our efforts?

The answer is simple. We have five basic draws to our community. All of which will bring more people if a specific targeted effort is made in conjunction with existing and potential partners.

Wilsonville's Top Five

1. **Agri-tourism** – Assist Agri-tourism partners and up-coming projects (such as new farm-loop with Mary Stewart). Foster better connections with vineyards in Yamhill and Washington Counties.
2. **Oregon Horse Country** – Keep the momentum of this fantastic program (still in its infancy) alive and healthy despite the changes in tourism. Increase number of shows and clinics in Wilsonville and her surrounding area.
3. **Sports and Tournaments (including cycling)** – After a recent meeting with school officials, I am determined to see the chamber work in close partnership with the schools to insure tournament families are welcomed properly and encouraged to stay in our hotels with packages and possible grants assistance. I want Wilsonville seen as the premier place to hold small tournaments and more importantly, to stay no matter where in the valley your tournament is held.

4. **Conventions and meetings** – We have become an ideal place for equestrian meetings and events, but we can expand on this to include many other industries. We have never had anyone really spearheading meetings and conventions and in a new tourism plan, I would make this a priority with measurable goals and expectations.

5. **I-5 Connections** – We are ideally situated to market ourselves for weekend getaways to PDX, wine country, horse country and family gatherings due to our location and competitive rates. I have a series of ad ideas that would position Wilsonville as THE place to stay if you live in Medford, Eugene, and Grants Pass (etc.). for shopping and various other activities.

These goals are simple and easy to identify. They will also be easy to build a solid plan around that not only meets the needs of all organizations, but gives more to the community as well.

The concept here is not new. It's refined. I have been working on meetings and events for the past few years as is evident by the increase in TLT tax revenue which has been higher in the months I have made the most effort. When I started OHC and working on conventions and groups, our TLT tax went up, drastically. Chamber staff have tracked where our time is best spent and these five points are where our efforts need to be concentrated.

On a personal note, I believe the Chamber has done an excellent job of allowing me to do MY job. My job, as I understood it when I was first hired, was to satisfy the Chambers contracts with the county and the city. The city desired events and activities to increase their TLT tax intake and the County wanted a VC manager for their Visitor Center. I attempted to do both as well as I could, but I was never naïve to the fact that my time spent in the VC as opposed to the time I spent coordinating groups and planning events was not equal in terms of the return we saw as a community. I slowly began focusing efforts in more of a CVB role and I believe it was the right thing to do. Now, I believe we (all willing partners) need to refine this as a concerted and collaborative effort.

It is with this purpose that I bring up the following proposed and modified TAP for Wilsonville. One that is simple, concise and measureable.

Appendix 11

Resources and Publications

Listings of (a) the relevant plans, reports, strategies resources and (b) marketing communications and tourism publications, reviewed for the purposes of the Tourism Development Strategy as part of the first step audit process.

Publication (Planning/Community)	Organization
Visitor Destination Action Plan (2011 Update)	City of Wilsonville and Chamber of Commerce
Agenda/City Council Meeting – Pre Council Work Session – RVC/MIC Tourism Strategic Plan Taskforce (18 March 2013)	Wilsonville City Council
Economic Development Strategy – Aug 2012	City of Wilsonville
Economic Opportunities Analysis (EOA) Update – Final Draft, July 2012	City of Wilsonville
City of Wilsonville Community Profile	City of Wilsonville
Tualatin-Wilsonville Joint Economic Workshed – July 2010	Cities of Wilsonville and Tualatin – Chambers of Commerce Presentation
Recommendations of the Economic Development Task Force On Business Attributes and Incentives – March 2013	City of Wilsonville
Communications Plan – Draft March 2012	City of Wilsonville
French Prairie Bike-Ped-Emergency Bridge, Briefing Booklet – March 2012	City of Wilsonville
The Potential of Bike Tourism in W’Ville	Tim Knapp, C of C Breakfast Forum, May 2012
Ice Age Tonquin Trail Master Plan – Presentation February 2013	Partner Cities/Counties/Metro
National Citizen Survey - City of Wilsonville Summary of Findings July 2, 2012	The National Citizen Survey
2013 Annual Report for the Community	City of Wilsonville
2011 State of the City Address: Status Report – Update on Trends & Current Situation	City of Wilsonville (Mayor)
2013 Congressional Briefing Booklet – City of Wilsonville/SMART	City of Wilsonville/SMART
2013 State Legislative Agenda – City of Wilsonville/SMART	City of Wilsonville/SMART
“Beauty & the Bridge” I-5 Interchange Student Art Project	City of Wilsonville/West Linn-Wilsonville School District
The Boones Ferry Messenger (2013)	City of Wilsonville
MAPS:	
• City Facilities, Parks and Trails	City of Wilsonville
• City Limits and County Boundaries	City of Wilsonville
• Aerial Image 2008 – City of Wilsonville	City of Wilsonville
• Land Use Categories – Wilsonville	City of Wilsonville

Publication (Tourism related)	Organization
Wilsonville Events & Activities Map 2012-2013	Wilsonville Area Chamber of Commerce/Oregon's Mt Hood Territory
Wilsonville Summer Events 2013	City of Wilsonville
Wilsonville Parks	City of Wilsonville
Street & Area Map/Wilsonville Area Chamber of Commerce	Wilsonville Area Chamber of Commerce
Wilsonville - Oregon's Mt Hood Territory	Wilsonville Area Chamber of Commerce/Oregon's Mt Hood Territory
A Historic Tour of Wilsonville	Wilsonville-Boones Ferry Historical Society
Oregon Horse Country: Promoting the passion of Equestrian Tourism, Events, Business	Oregon Horse Country – Division of Wilsonville Chamber of Commerce
2013 Dining Guide (List)	Wilsonville Area Chamber of Commerce/Oregon's Mt Hood Territory
Wilsonville Bike and Walk Map	City of Wilsonville/SMART
Willamette Valley - Oregon Wine Country	Oregon's Mt Hood Territory (CCTCA)
Visitor Guide/Travel Planner/Activity Guide	Clackamas County Tourism & Cultural Affairs
Oregon's Washington County 2012-2103 Visitors Guide	Washington County Visitors Association
Travel Oregon 2013-2014 Official Visitor Guide	Travel Oregon
Oregon Scenic Bikeways (Brochure/Route Maps)	RideOregonRide.com/Bikeways
Wilsonville Walks 1 – Boeckman Creek Crossing	City of Wilsonville/SMART
Wilsonville Walks 2 – Boones Ferry to Memorial Park	City of Wilsonville/SMART
Wilsonville Walks 3 – Charbonneau Historic Resources	City of Wilsonville/SMART
Wilsonville Walks 4 – SMART Central WES to the Water	City of Wilsonville/SMART
Wilsonville Walks 5 – Old Town Historic Resources	City of Wilsonville/SMART
Wilsonville Walks 6 – Town Center to Memorial Park	City of Wilsonville/SMART
Access (Business, community, recreation)	Wilsonville Area Chamber of Commerce

Appendix 12

Wilsonville Parks Survey 2013

The following is a survey conducted by the City of Wilsonville in regard to the use of city parks, satisfaction levels and directions for new facilities.

Wilsonville Parks Survey

9/23/2013





PROJECT MANAGEMENT, DEVELOPMENT, POLICY
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Introduction and Methodology

In an effort to better understand the motivations, habits, and preferences of visitors to Wilsonville's parks, Elaine Howard Consulting, LLC completed surveys at two popular Wilsonville park locations. Murase Plaza is a small northern portion of Memorial Park and contains two covered gathering areas, a playground, bathrooms, rolling grassy hills, trees, paths, picnic tables, and a water feature. Town Center Park is a standalone park that also features a playground and a large water fountain. It is mostly flat and has a path that circumnavigates the park, one sheltered gathering area, picnic tables, bathrooms, trees, and a Korean War memorial. It was generally observed by the surveyors that, on the days field work was being completed, Murase Plaza typically had more park patrons enjoying both the playground and the water features than at Town Center Park, but both parks were quite busy, especially on weekends.

The survey was short, containing only eight questions, with an optional, open-ended, ninth question added at the request of the City of Wilsonville about halfway through the process. The survey questions were the same at both parks. 100 surveys were completed at each park, for a total of 200 surveys. Participation was voluntary, though it is estimated that over 95% of park patrons who were solicited opted to participate in the survey. The most common reason for declining to participate was the lack of adequate English skills to communicate with the surveyor. Only adults and teenagers were given the option of completing the survey, and while this fact is not represented anywhere in the survey questions, the vast majority of those who completed the survey were parents who were attending the park with their children.

It should be noted that this survey represents the opinions of Wilsonville residents who visit local Wilsonville parks, as they were the only ones who were asked to complete the survey. The surveying was also conducted on primarily sunny and warm days during the summer, so some questions will have skewed responses as everyone surveyed chose to be at the park on that day. People who don't appreciate or like the types of activities the park offers on warm days would not have been at the park, so their opinions will not be represented within this report.

Survey and Observations

The survey consisted of between eight and nine simple questions, and typically took around five minutes to complete. The specific consideration and conditions of each question will be discussed in more depth below, but the questions were:

What is your city of residence?

What leads you to the city of Wilsonville?

Approximately how many times per summer do you come to Town Center Park/Murase Plaza?

How many people are typically in your group?

Which park features do you enjoy the most?

How long is your typical park visit?

When you visit the park, do you also visit any of the nearby retail establishments?

Approximately how much do you spend in local retail establishments in conjunction with your average park visit?

(Added partway through the process) If you could, would you add anything or change anything about the park?

Many observations were made throughout the surveying process that were not necessarily reflected in the survey responses. By combining these observations with the actual survey responses, the following summary points should be highlighted:

People at the parks who were not from Wilsonville were frequently in Wilsonville specifically to visit the park where they were surveyed.

Of the Town Center Park respondents who did not reside in Wilsonville (63% of those surveyed), 63.49% indicated the main purpose of their visit to Wilsonville was to visit the park, and the other three main answers could often be linked directly to the park: friends (6.35%) and family (6.35%) often meant that they were meeting for the day at the park, and birthday party (9.52%) meant they were attending a birthday party at the park.

At Murase Plaza the results were similar: of the respondents who did not reside in Wilsonville (83% of those surveyed), 59.76% cited Murase, parks, or Murase's water feature as their main reason for being in Wilsonville. Family was mentioned in a larger portion of responses at Murase (19.51%) than at Town Center Park, but friends was similar (6.10%).

People who do not reside in Wilsonville made up 63% of those surveyed at Wilsonville's Parks.

People come for the water features.

While acknowledging that the surveys were performed on warm days, it is still worth noting that a large amount of respondents said their favorite feature in the parks is the water features. At Town Center Park, 93.00% mentioned the water feature when describing their favorite part of the park, and at Murase Plaza the number was lower, but still high at 79.00%.

People typically stay between one and three hours.

Respondents at Murase Plaza said they stay slightly longer than at Town Center Park, but the majority of respondents at both parks indicated that their typical visit is between one and three hours. At Murase Plaza, 65.00% of respondents selected this option. At Town Center Park, 78.00% did so.

Over three quarters of those surveyed spend money at local businesses in conjunction with their park visit. 35.5% spend over \$25 per visit.

People do spend money at local businesses in conjunction with their park visit.

At both parks, nearly three quarters of respondents indicated they spend money in conjunction with their typical park visit (Town Center Park: 78.00%; Murase Plaza: 74.00%). When

totaling the responses of both parks, the most frequent destination at which respondents spend their money is fast food restaurants.

The most mentioned changes or additions to the parks were more shade and trees, more swings, and more playground equipment.

Keeping in mind that the days the surveys were completed were sunny and warm, many respondents who said they would like to change or add something to the park wished for more shade. The grassy area by the Murase Plaza water feature, in particular, received special attention from some respondents in relation to needing more shade. The surveyors did notice that many groups of people brought their own sun shelters or tents to set up on the grass.

Other than this, swings and playground equipment at Town Center Park was another common theme, receiving mention in around one third, out of those who chose to respond, of the answers to question nine.

Responses to Questions

The following section contains the results of each specific question, in both written and graphic format, where appropriate. The specifics of how the questions were offered to respondents, and how answers were recorded will also be discussed, along with any other information worth noting.

1. What is your city of residence?

This was a simple question that required no special explanation. Just over a quarter (27.5%) of all respondents said they reside in Wilsonville. However, there were 37 respondents from Town Center Park who indicated they are from Wilsonville, and only 18 respondents at Murase Plaza said the same. The portion of park goers from Wilsonville was double at Town Center Park what it was at Murase Plaza. This disparity could indicate a number of things, from a lack of advertising or wayfinding for Town Center Park to the possibility that people with a more intimate knowledge of Wilsonville parks choose Town Center Park, for some reason, over Murase Plaza.

In fact, there were a number of unsolicited comments made by respondents at Town Center Park about why they were not at Murase Plaza, but there were none made in the reverse. The reasons ranged from the children being smaller at Town Center Park, to better visibility, to a fear of children being able to run the short distance from the northern portion of Murase Plaza's water features to a very busy street with no barriers to stop them.

Table 1. Combined Responses to "What is your city of residence?" (n=200)

City	Murase Plaza	Town Center Park	Combined	Combined Percent
Wilsonville	18	37	55	27.50%
Canby	3	13	16	8.00%
Portland	7	7	14	7.00%
Tualatin	6	6	12	6.00%
Tigard	7	3	10	5.00%
Beaverton	5	4	9	4.50%
Salem	8	1	9	4.50%
Newberg	7	1	8	4.00%
Sherwood	4	3	7	3.50%
Oregon City	2	3	5	2.50%
West Linn	3	2	5	2.50%
Hillsboro	2	2	4	2.00%
Aurora	2	2	4	2.00%
Milwaukie	3	0	3	1.50%
Molalla	1	2	3	1.50%
Lake Oswego	1	2	3	1.50%
Mount Angel	0	3	3	1.50%
Other	21	9	30	15.00%
Total	100	100	200	100.00%

2. What brings you to Wilsonville today?

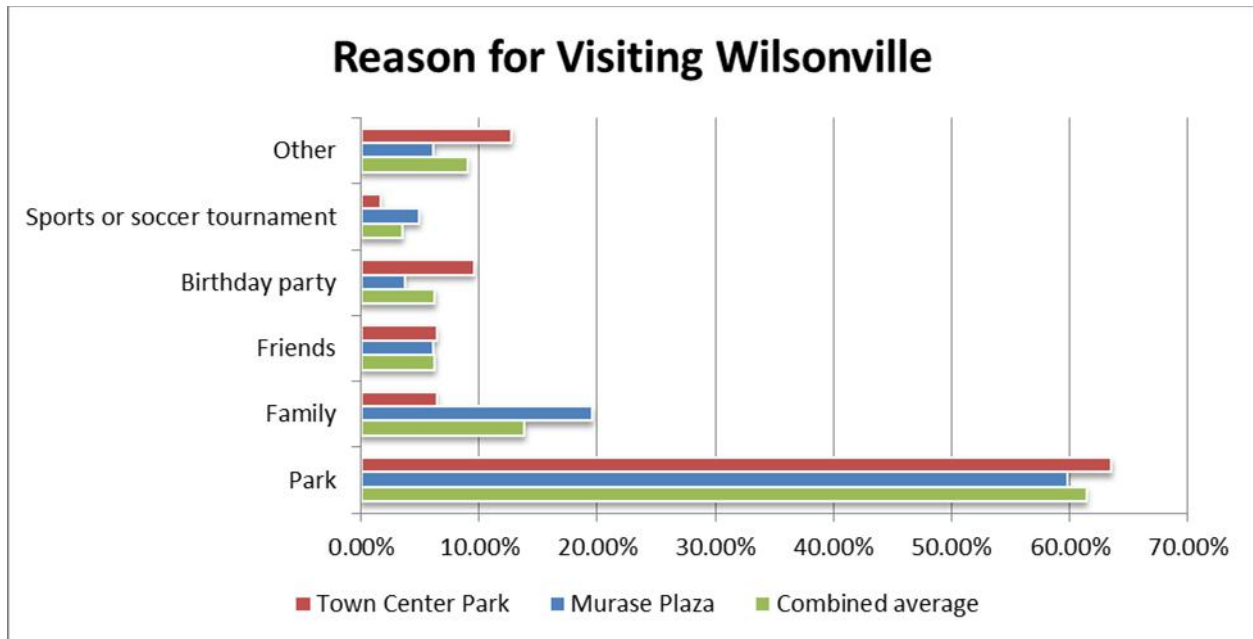
This question was asked only if respondents did not indicate that their city of residence is Wilsonville. If respondents indicated that they were in Wilsonville for a specific feature in the park they were at, then their answer was recorded to indicate that they were in Wilsonville to visit the park.

Table 2. Combined Responses to "What brings you to Wilsonville today?" (n=145)

Reason	Murase Plaza	Town Center Park	Combined average
Park	59.76%	63.49%	61.38%
Family	19.51%	6.35%	13.79%
Friends	6.10%	6.35%	6.21%
Birthday party	3.66%	9.52%	6.21%
Sports or soccer tournament	4.88%	1.59%	3.45%
Other	6.10%	12.70%	8.97%
Total	100.00%	100.00%	100.00%

By far the largest number of responses from people not from Wilsonville were that they were in town to visit the park at which they were being surveyed. Over 61% of respondents said they were in town for the purpose of visiting the park. The next most frequent response was visiting family, and accounted for 13.79% of responses.

Chart 1. Responses to "What brings you to Wilsonville today?" (n=145)



3. Approximately how many times per summer do you come to Town Center Park/Murase Plaza?

For this question, the assumption was that summer was a three-month period. Some people liked to answer with a specific number, while others preferred to respond, "once a week," for example. In the case of the latter form of response, the specified number of times per week was multiplied by 12, and this answer was recorded. If someone made an indeterminate response, such as, "all the time," they were pressed until they assigned a number. Also, if there was some distinction made between previous summers and this summer, then it was requested that they estimate the amount of times they came to the park in the current summer and disregard the previous ones.

Table 3. Categorized Combined Responses to "Approximately how many times per summer do you come to Town Center Park/Murase Plaza?" n=200

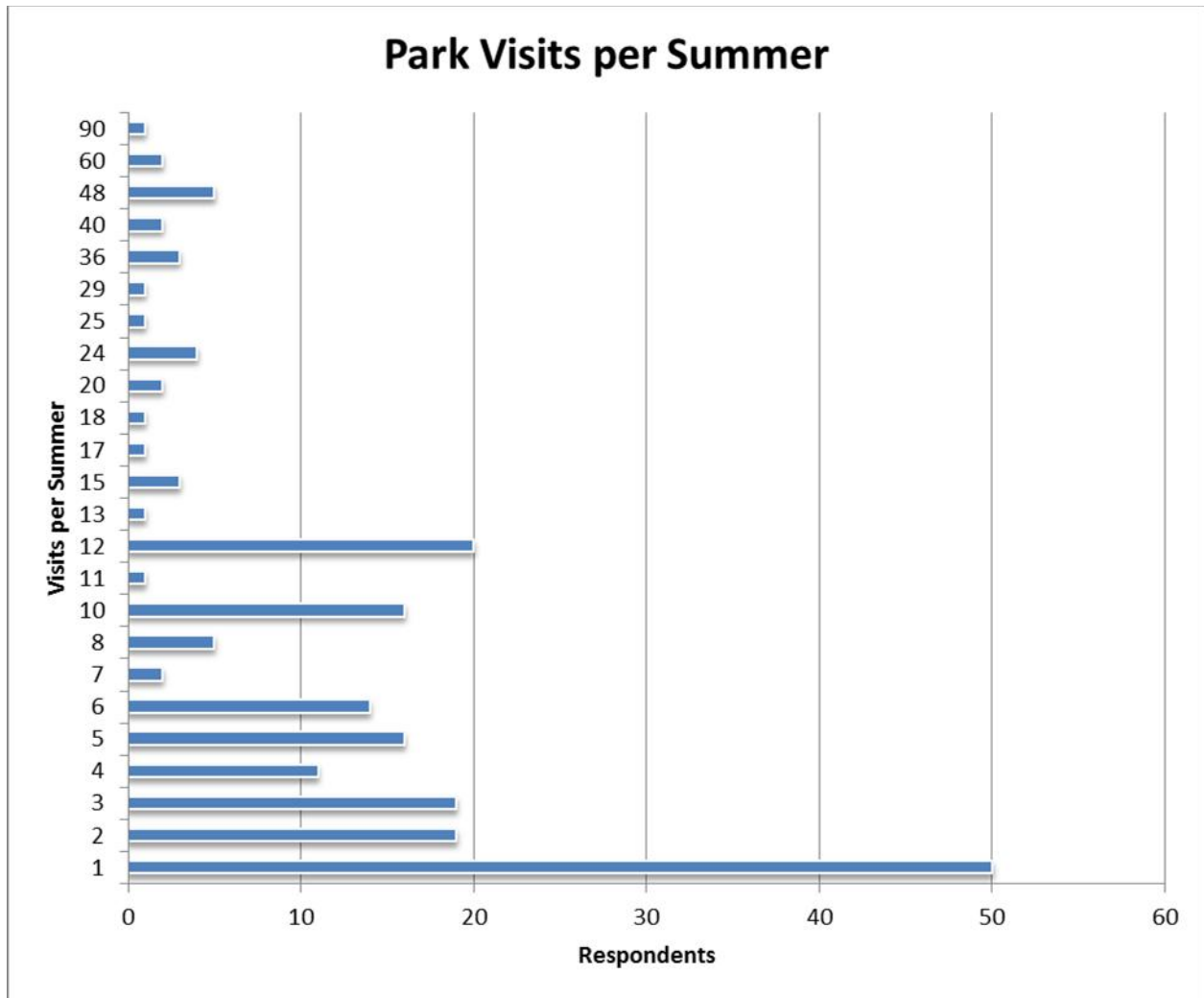
Visits per Summer	Respondents	Percent
First time visitors	50	25.00%
Visit at least once every other week	71	36.50%
Visit once a week or more	27	14.50%
Visit twice a week or more	15	8.50%
Average visits this summer	8.695	

A quarter of respondents said they are first time visitors to the park, despite the fact that the survey took place late in the summer (August/September). Over one third (36.50%) of respondents indicated that they visit the park at which they were being surveyed at least once every other week. It should be noted that the responses do not reflect visits to other parks. For example, if a person was being surveyed at Town Center Park, it can be assumed that the respondents visit parks in general more often, as this question accounts for visits only to a single park.

The average number of visits to the park at which the survey was being conducted was over eight times per summer. The average from Town Center Park respondents was 9.91, and the average from Murase Plaza was 7.48.

The following chart, Chart 2, shows the distribution of all responses to the question. The distribution is, obviously, skewed towards the lower number of visits per summer, but there are a fair number of responses above 12 times per summer, which corresponds to visiting once a week.

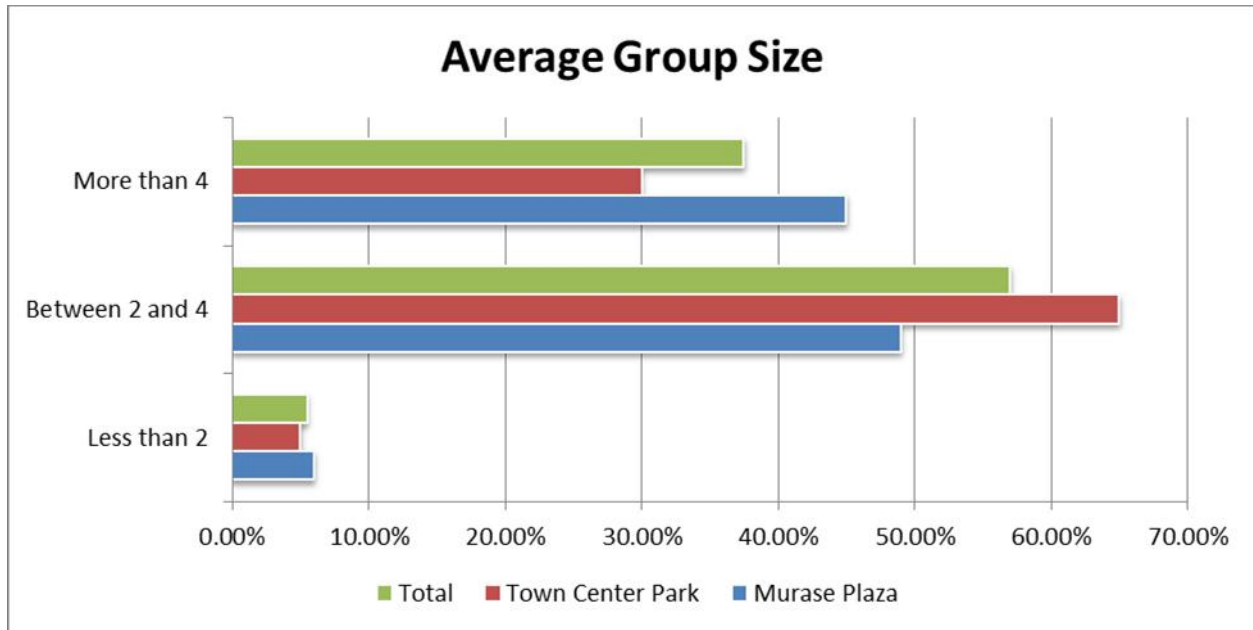
Chart 2. Combined Responses to "Approximately how many times per summer do you come to Town Center Park/Murase Plaza?" n=200



4. How many people are typically in your group?

This question was fairly straightforward, and people were given three choices: less than two, two to four, or more than four. The following chart reflects the fact that, while every adult or teenage in the park was surveyed, the respondents were primarily parents and the number of people attending the park alone was minimal.

Chart 3. Responses to "How Many People are Typically in Your Group?" n=200



The largest category of responses indicated that most groups had between 2 and 4 people, and 57.00% of those surveyed selected this category. Less than 2 was the least selected category, at 5.50%, and in the middle was more than 4, with 37.50% of responses.

5. Which park features do you enjoy the most?

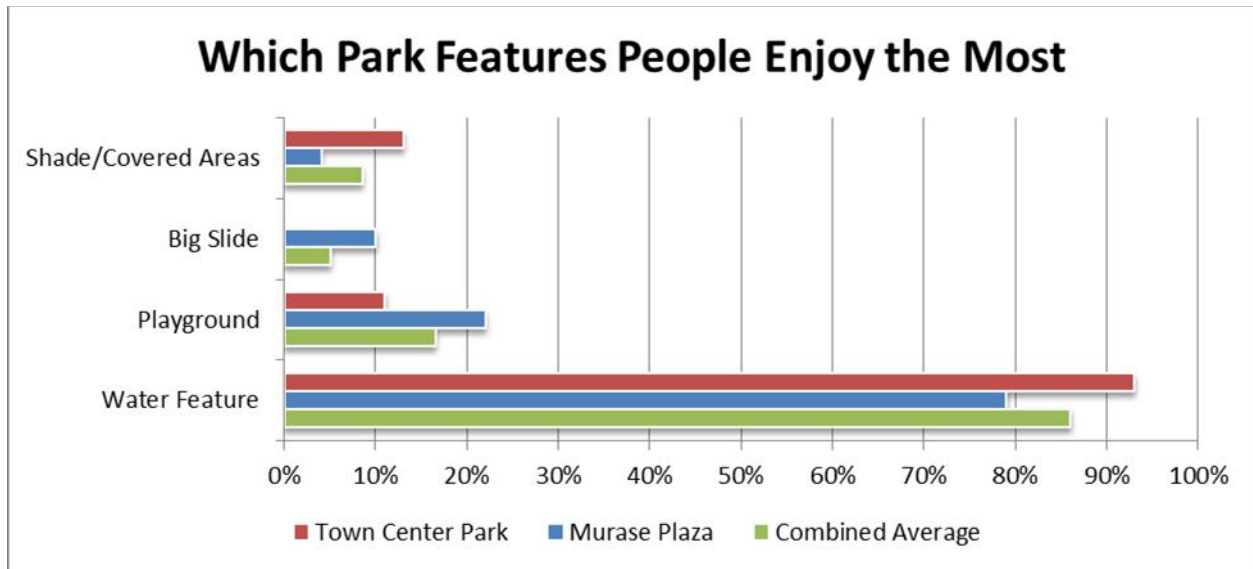
To answer this question, most respondents indicated the park feature that they were currently utilizing, or more precisely, which feature their children were currently utilizing. Responses were not kept to only one thing, so many people listed off a number of their favorite features. Due to the fact that some people mentioned several features in their responses, the percentages for this question will not add up to 100%.

Table 4. Responses to "Which park features do you enjoy the most?" n=200

Park Feature	Murase Plaza	Town Center Park	Combined Average
Water feature	79.00%	93.00%	86.00%
Playground	22.00%	11.00%	16.50%
Big slide	10.00%	0.00%	5.00%
Shade/covered areas	4.00%	13.00%	8.50%

Town Center Park, perhaps owing to its smaller playground, had a higher percentage of respondents (93.00%) than Murase Plaza, mention its water feature as their favorite feature, and a lower percentage (11.00%) mention its playground. By far, the most highly favored feature in the parks were the water features, with an average across all 200 respondents of 86.00%.

Chart 4. Responses to "Which park features do you enjoy the most?" n=200



The "big slide" is a feature at Murase Plaza that does not exist at Town Center Park. Of those surveyed at Murase Plaza, 10% mentioned the big slide as one of their favorite features, and those who were surveyed around the playground had the highest likelihood of mentioning the slide.

6. How long is your typical park visit?

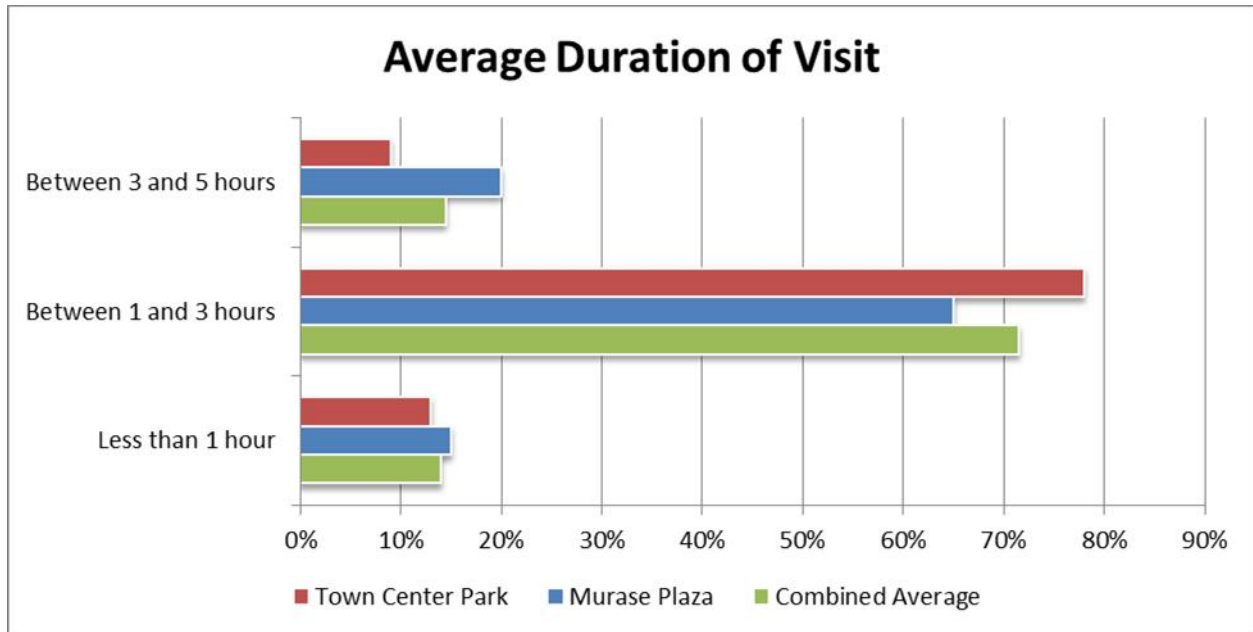
For this question, respondents were given four choices: less than an hour, one to three hours, three to five hours, and more than five hours. When respondents answered something other than these, their answer was appropriately placed into one of the categories.

Table 5. Responses to "How long is your typical park visit?" n=200

Average Visit Duration	Murase Plaza	Town Center Park	Combined Average
Less than 1 hour	15.00%	13.00%	14.00%
Between 1 and 3 hours	65.00%	78.00%	71.50%
Between 3 and 5 hours	20.00%	9.00%	14.50%
More than 5 hours	0.00%	0.00%	0.00%
Total	100.00%	100.00%	100.00%

No respondents at either park indicated that their average visit was over five hours. About an equal amount of people responded that their visit was less than an hour (combined average of 14%) as people who responded that their visit was between three and five hours (combined average of 15%). By far the most popular response at both parks (a 72% combined average) to the question was between one and three hours.

Chart 5. Responses to "How long is your typical park visit?" n=200



7. When you visit the park, do you also visit any of the nearby retail establishments?

This question was a little less straightforward than the others. After the question was read, respondents were given categories to choose from: fast food, sit-down food, grocery store, or other types of retail. In response to this, people liked to answer the specific establishment they most often frequented, and it was left up to the surveyor to fit that into one of the above categories. For the sake of this survey, borderline establishments like Subway, Starbucks, and Jamba Juice were classified as fast food establishments.

Answers were also not exclusive, so the number of responses will not tally up to 100%. Some people responded they did not shop at all, and some people responded that they frequently go to all of the listed categories of local businesses in conjunction with their typical park visit.

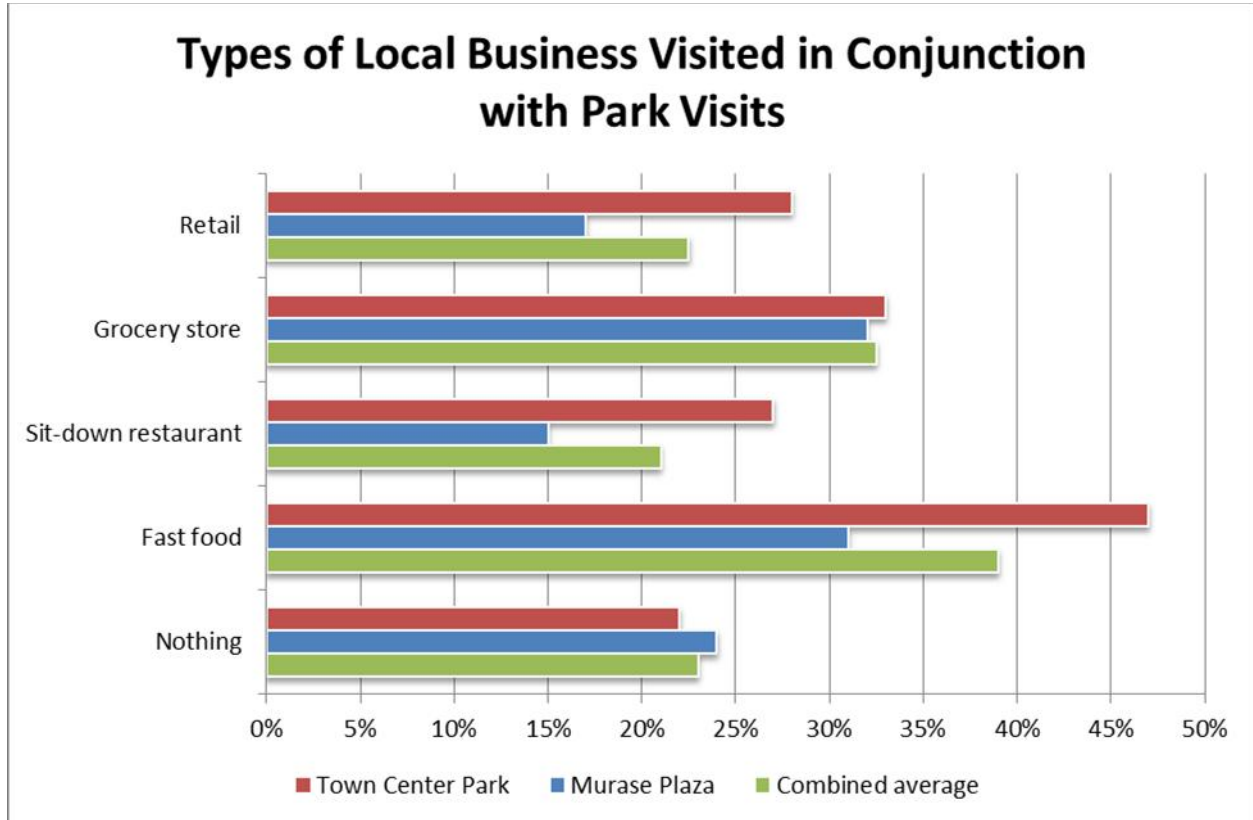
Table 6. Responses to "When you visit the park, do you also visit any of the nearby retail establishments?" n=200

Mention visiting	Murase Plaza	Town Center Park	Combined Average
Nothing	24.00%	22.00%	23.00%
Fast food	31.00%	47.00%	39.00%
Sit-down restaurant	15.00%	27.00%	21.00%
Grocery store	32.00%	33.00%	32.50%
Retail	17.00%	28.00%	22.50%

Responses from both parks indicate that over three quarters of people who visit the park will typically visit local businesses in conjunction with their visit. Distribution between the categories is fairly even,

with retail establishments receiving the smallest portion of mentions (combined average of 22.50%), and fast food receiving the largest portion of mentions (combined average of 39%).

Chart 6. Responses to "When you visit the park, do you also visit any of the nearby retail establishments?" n=200



Something to note that is not evident from the data is that there were many respondents at Town Center Park that indicated they visited the Starbucks that is attached to the park. This was counted as fast food, and could account for some of the discrepancy between the fast food responses at Town Center Park (47%) and Murase Plaza (31%).

8. How much do you spend at local retail establishments in conjunction with your park visits?

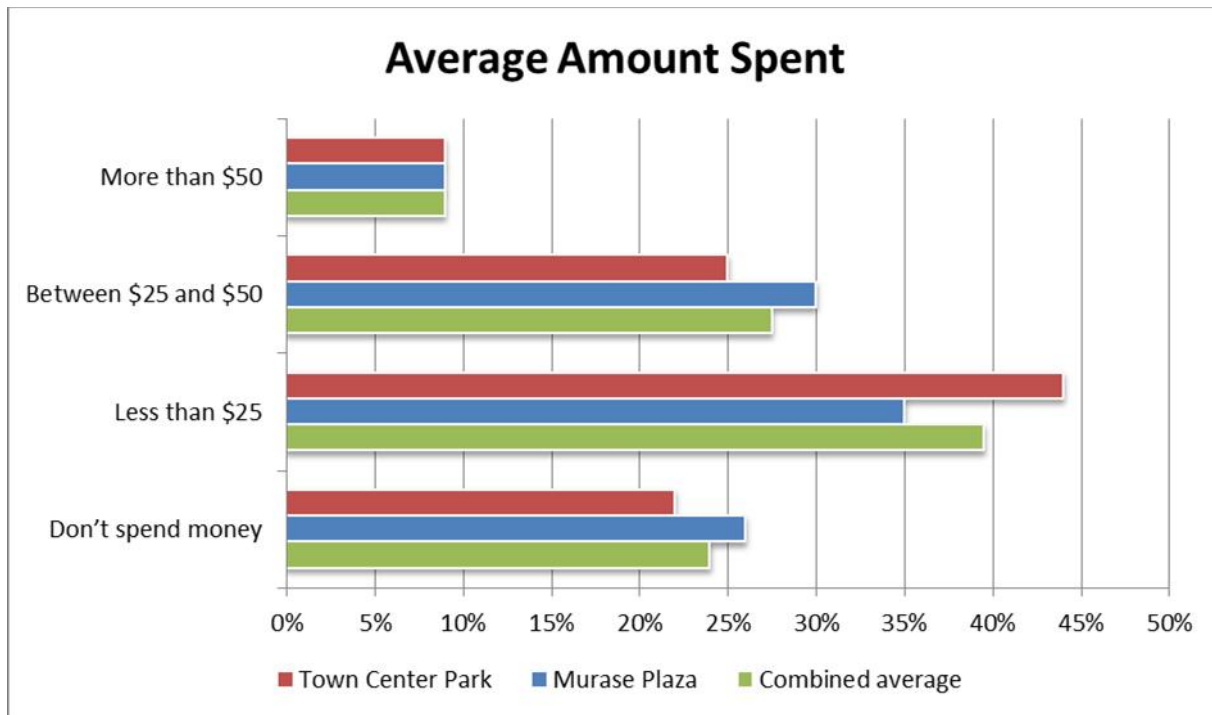
Respondents found this question to be quite straightforward, and usually simply selected one of the three offered categories: less than \$25, between \$25 and \$50, or over \$50. If some other number was stated, it was fit into one of the three categories. The most confusion arose when people tried to reconcile that sometimes, for example, they went to Costco and spent over \$50 and sometimes went to McDonalds for ice cream and spent under \$25. However, for this question, respondents were not allowed to select multiple categories, and so were asked to make one selection.

Table 7. Responses to "How much do you spend at local retail establishments in conjunction with your park visits?" n=200

Average Amount Spent	Murase Plaza	Town Center Park	Combined Average
Don't spend money	26.00%	22.00%	24.00%
Less than \$25	35.00%	44.00%	39.50%
Between \$25 and \$50	30.00%	25.00%	27.50%
More than \$50	9.00%	9.00%	9.00%
Total	100.00%	100.00%	100.00%

Most respondents (combined average of 63.50%) indicated that they spend \$25 dollars or less in conjunction with their typical park visit. Only 24.00% of the combined responses said they spend no money, and this percent includes those who responded in the previous question that they do not visit any local businesses in conjunction with their average park visit. The category with the least responses (combined average of 9.00%) was more than \$50, and between \$25 and \$50 received a combined average of 27.50% of responses.

Chart 7. Responses to "How much do you spend at local retail establishments in conjunction with your park visits?" n=200



9. If you could, would you change anything or add anything to the park?

This question was added partway through the process, so only 36 people at Murase Plaza and 59 people at Town Center Park were given the opportunity to respond to it. Of the total 95 people who had the option to respond, 52 could not think of anything they would want to change about the parks. The responses that were collected are listed in Table 8 and 9, below.

The most commonly mentioned theme was that there needed to be more shade at the parks. Most people did not mention where they wanted this shade, but those that did wanted it around the features that their kids were using so that they could monitor their children and still be in the shade. At Murase Plaza, a number of people who were at the playground mentioned that their children really enjoyed the sand when there was a sand pit. They wished it would come back. At Town Center Park, there were a few responses requesting either more swings at the playground, or simply more playground equipment in general.

Comments that arose multiple times throughout the surveying process, but often outside of the structure of the questions are listed below:

- Parents are concerned about the proximity of the busy street at Murase Plaza to the northwest edge of the water feature. They would like some sort of barrier there to stop children from being able to access the road, perhaps a waist-high clear fence.
- People enjoy the visibility that exists at Town Center Park. Large features, like the rolling hills between the water feature and the playground at Murase Plaza, that obstruct their ability to see their children, are undesirable.
- A number of people mentioned that they would often visit the library in conjunction with their park visits.

Table 8. Town Center Park responses to "If you could, would you change anything or add anything to the park?" n=59

Town Center Park	
1	more shade
2	bench seating closer to WF to better watch kids
3	more shade
4	more shade
5	appreciates that it is flat because it's good for little kids on bikes and for visibility
6	more PG equipment and swings for bigger kids, more fun in the park events
7	less slippery concrete
8	big kid swings
9	big kid swings / more fun in the park events
10	remove the dead tree / more fun in the park events
11	bigger playground
12	bigger playground
13	more swings
14	leave the water on later in the year because September is our most beautiful month, you could even turn it on later in summer
15	more shade
16	another drinking fountain
17	Could use a couple more swings
18	Murase Plaza: more shade
19	Murase Plaza: more shade
20	more older kid toys at the playground and more playground equipment
21	more benches close to the water feature that catch a breeze, the ones next to the building are good in terms of proximity, but the building blocks any breeze
22	Bigger playground area
23	more swings
24	bigger playground area
25	more big kid swings, more non-metal picnic tables (because metal gets too hot)
26	put in a sand pit like Sherwood has
27	more trees and more covered areas
28	more trees/more canopies and covered areas
29	more trees by the playground to shade playground equipment, especially the slide because it gets so hot
30	more space under shelters for shade

Table 9. Murase Plaza responses to "If you could, would you change anything or add anything to the park?" n=36

Murase Plaza	
1	no running signs by fountains because of collisions, respondent's kids were almost knocked over by bigger kids
2	wayfinding signs to direct visitors to destinations within the park (to the river especially)
3	It would be nice if the fountain sprayed longer in the air
4	separate big kid and little kid recreation areas better
5	bring back the sand in the playground
6	bring the sand back, more things to do for younger kids (1-2 year olds) make better line of sight between play areas (WF/PG) because if one kid wants to go to one area, and the other wants the other, the parent can't see both kids, more shade
7	bring the sand back
8	more shaded picnic tables
9	more trees and more shade especially around the water features on the grassy hill
10	more trees for shade
11	more little kid swings
12	swimming pool
13	better sightlines between playground and water feature

Appendix 12

2013 DMO Organizational & Financial Profile Study: Consolidated

The following pages are extracts from the 2013 DMO Organizational & Financial Profile Study which is the most comprehensive study of its type produced for destination marketing organizations. The study includes detailed information on 218 participating DMOs' revenues and expenses (including personnel, sales & marketing programs, administration), funding sources such as TIDs, visitor taxes breakdowns and allocations, financial policies, visitor center information and online marketing efforts.

DMO Profile

	All Respondents	BUDGET SIZE												
		Less Than \$500,000		\$500,000 to \$999,999		\$1,000,000 to \$1,999,999		\$2,000,000 to \$4,999,999		\$5,000,000 to \$9,999,999		\$10,000,000 or More		
		Count	Average	Count	Average	Count	Average	Count	Average	Count	Average	Count	Average	
PERIPHERAL OPERATIONS														
Does your DMO have peripheral operations?														
Yes	18	11.0%	0	0.0%	2	11.1%	4	16.7%	2	4.3%	3	15.8%	7	17.1%
No	146	89.0%	10	100.0%	16	88.9%	20	83.3%	44	95.7%	16	84.2%	34	82.9%
If yes, please indicate peripheral operations:														
Convention center	10	55.6%	0	0.0%	1	50.0%	1	25.0%	2	100.0%	2	66.7%	4	57.1%
Parking facility	3	16.7%	0	0.0%	0	0.0%	0	0.0%	1	50.0%	1	33.3%	1	14.3%
Sports facility	4	22.2%	0	0.0%	0	0.0%	0	0.0%	1	50.0%	0	0.0%	3	42.9%
Museum/Cultural institution	4	22.2%	0	0.0%	1	50.0%	1	25.0%	1	50.0%	0	0.0%	1	14.3%
Other	8	44.4%	0	0.0%	1	50.0%	2	50.0%	0	0.0%	1	33.3%	4	57.1%
ORGANIZATION STRUCTURE														
501(c)(6)	137	62.8%	8	61.5%	14	48.3%	25	65.8%	37	61.7%	14	63.6%	31	72.1%
501(c)(3)	4	1.8%	0	0.0%	2	6.9%	0	0.0%	2	3.3%	0	0.0%	0	0.0%
501(c)(4)	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Non-Profit (non-US)	20	9.2%	2	15.4%	5	17.2%	1	2.6%	7	11.7%	1	4.5%	2	4.7%
City Gov't Agency	11	5.0%	1	7.7%	3	10.3%	3	7.9%	1	1.7%	1	4.5%	1	2.3%
County Gov't Agency	16	7.3%	1	7.7%	3	10.3%	4	10.5%	1	1.7%	0	0.0%	5	11.6%
State/Provincial Gov't Agency	5	2.3%	0	0.0%	1	3.4%	0	0.0%	3	5.0%	0	0.0%	1	2.3%
Chamber of Commerce	10	4.6%	0	0.0%	0	0.0%	5	13.2%	0	0.0%	3	13.6%	0	0.0%
Authority	9	4.1%	0	0.0%	1	3.4%	2	5.3%	3	5.0%	0	0.0%	3	7.0%
Private/Public Sector Partnership	6	2.8%	1	7.7%	2	6.9%	0	0.0%	1	1.7%	2	9.1%	0	0.0%
Other	15	6.9%	0	0.0%	2	6.9%	2	5.3%	7	11.7%	2	9.1%	2	4.7%
ADDITIONAL CORPORATIONS														
Have additional or affiliate corporations?														
Yes	46	22.2%	0	0.0%	0	0.0%	7	18.9%	13	22.4%	6	28.6%	18	42.9%
If yes, please check all that apply:														
For Profit	5	10.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	5	27.8%
501(c)(3)	34	73.9%	0	0.0%	0	0.0%	5	71.4%	9	69.2%	5	83.3%	14	77.8%
501(c)(4)	1	2.2%	0	0.0%	0	0.0%	1	14.3%	0	0.0%	0	0.0%	0	0.0%
501(c)(6)	7	15.2%	0	0.0%	0	0.0%	2	28.6%	2	15.4%	1	16.7%	2	11.1%
Non-Profit (non-US)	1	2.2%	0	0.0%	0	0.0%	0	0.0%	1	7.7%	0	0.0%	0	0.0%
Other	13	28.3%	0	0.0%	0	0.0%	2	28.6%	2	15.4%	3	50.0%	5	27.8%

DMO Profile

	All Respondents	BUDGET SIZE												
		Less Than \$500,000		\$500,000 to \$999,999		\$1,000,000 to \$1,999,999		\$2,000,000 to \$4,999,999		\$5,000,000 to \$9,999,999		\$10,000,000 or More		
		Count	Average	Count	Average	Count	Average	Count	Average	Count	Average	Count	Average	
NUMBER OF EMPLOYEES ON STAFF (Medians)														
Most Recently Completed FY (actual)														
Full-Time	215	13	12	2	29	5	38	7	60	16	21	27	43	57
Regularly Scheduled Part-Time	215	2	12	1	29	1	38	2	60	4	21	4	43	4
Total Full-Time Equivalent Employees	215	14.00	12	2.00	29	5.50	38	8.75	60	17.50	21	32.50	43	60.00
Part-Time On-call Staff Employees	62	9	1	2	2	3	8	3	20	5	7	10	21	32
Regularly Scheduled Volunteers	75	13	2	23	9	3	12	14	22	10	11	40	14	22
Current FY (budgeted)														
Full-Time	211	13	13	2	29	5	38	7	58	16	21	28	41	57
Regularly Scheduled Part-Time	211	2	13	0	29	1	38	2	58	4	21	4	41	4
Total Full-Time Equivalent Employees	211	14.00	13	2.00	29	5.62	38	8.75	58	18.00	21	32.50	41	59.00
Part-Time On-call Staff Employees	60	8	1	2	3	2	8	3	19	5	6	13	20	36
Regularly Scheduled Volunteers	67	15	1	45	8	6	8	18	22	10	11	38	13	13
CHANGES IN STAFFING														
Full-Time														
Remained the Same	129	61.7%	8	66.7%	26	89.7%	27	71.1%	35	60.3%	8	38.1%	18	43.9%
Increased	59	28.2%	4	33.3%	3	10.3%	7	18.4%	13	22.4%	12	57.1%	18	43.9%
Decreased	21	10.0%	0	0.0%	0	0.0%	4	10.5%	10	17.2%	1	4.8%	5	12.2%
Regularly Scheduled Part-Time														
Remained the Same	118	71.5%	5	71.4%	13	65.0%	25	80.6%	37	74.0%	11	64.7%	21	65.6%
Increased	26	15.8%	0	0.0%	5	25.0%	1	3.2%	7	14.0%	5	29.4%	6	18.8%
Decreased	21	12.7%	2	28.6%	2	10.0%	5	16.1%	6	12.0%	1	5.9%	5	15.6%
Total Full-Time Equivalent Employees														
Remained the Same	115	54.5%	9	69.2%	21	72.4%	26	68.4%	32	55.2%	5	23.8%	15	36.6%
Increased	71	33.6%	4	30.8%	7	24.1%	5	13.2%	16	27.6%	15	71.4%	21	51.2%
Decreased	25	11.8%	0	0.0%	1	3.4%	7	18.4%	10	17.2%	1	4.8%	5	12.2%

DMO Profile

	All Respondents Count	BUDGET SIZE												
		Less Than \$500,000		\$500,000 to \$999,999		\$1,000,000 to \$1,999,999		\$2,000,000 to \$4,999,999		\$5,000,000 to \$9,999,999		\$10,000,000 or More		
		Count	Average	Count	Average	Count	Average	Count	Average	Count	Average	Count	Average	
Number of full-time employees (FTEs) regularly telecommuting in DMO's main office and/or out-of-town/satellite office(s)														
Main Office	51	11	1	2	3	3	6	7	12	7	8	19	20	12
Out-of-town/Satellite Office(s)	52	4	0	0	1	6	1	8	3	10	3	32	4	
DMO CONTRACTS														
DMO has a Contract With Primary Funding Source/Entity	127	59.1%	6	46.2%	16	57.1%	20	54.1%	32	53.3%	16	72.7%	29	69.0%
If Yes, How is the Contract Awarded RFP	13	9.9%	0	0.0%	2	11.1%	1	4.8%	4	12.1%	2	13.3%	4	13.8%
Gov't. Auth./No RFP	118	90.1%	7	100.0%	16	88.9%	20	95.2%	29	87.9%	13	86.7%	25	86.2%
If Yes, What is the Term of the Contract Annual	50	39.1%	2	33.3%	5	33.3%	7	33.3%	14	42.4%	10	58.8%	6	21.4%
Multi-Year:	78	60.9%	4	66.7%	10	66.7%	14	66.7%	19	57.6%	7	41.2%	22	78.6%
If Multi-Year contract, Number of Years:	68	6	4	5	11	6	12	8	16	6	5	5	19	6
If Yes, Does the Contract Have Quantifiable Performance Goals for the DMO?	35	27.6%	0	0.0%	1	6.3%	5	25.0%	8	25.0%	6	37.5%	14	48.3%
Room nights booked	21	16.5%	0	0.0%	1	6.3%	5	25.0%	7	21.9%	1	6.3%	7	24.1%
Visitor spending generated by DMO efforts	27	21.3%	0	0.0%	2	12.5%	8	40.0%	8	25.0%	3	18.8%	5	17.2%
Return on Investment (ROI)	56	44.1%	6	100.0%	8	50.0%	13	65.0%	14	43.8%	4	25.0%	8	27.6%
No quantifiable performance goals	37	29.1%	0	0.0%	7	43.8%	2	10.0%	8	25.0%	8	50.0%	9	31.0%
Other														

DMO Profile

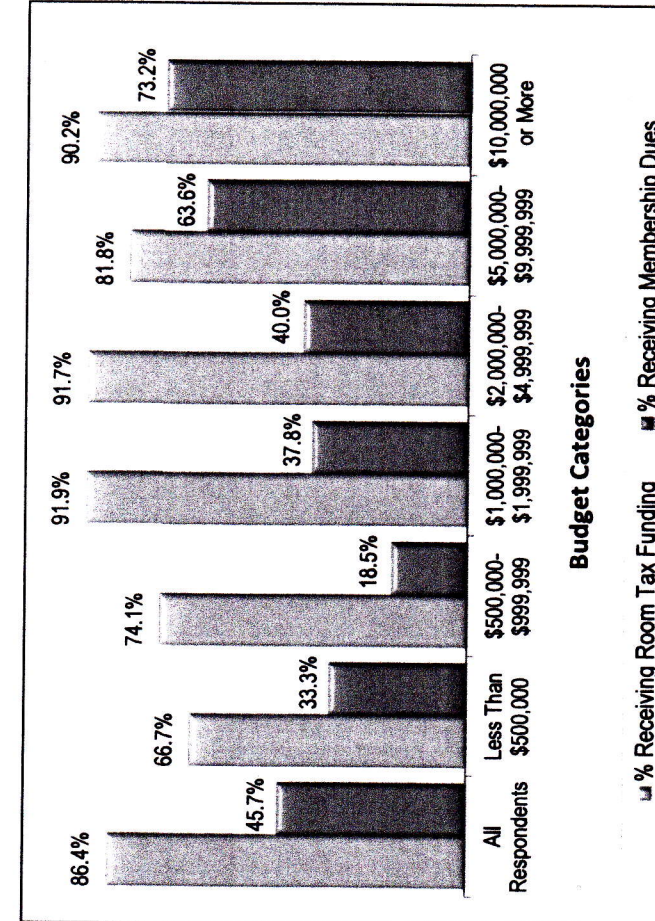
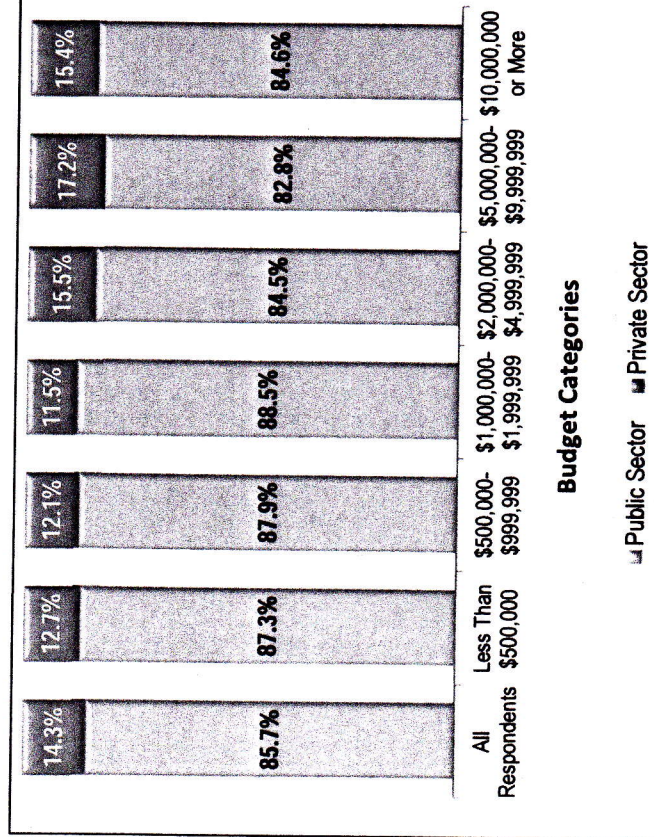
	All Respondents Count	BUDGET SIZE												
		Less Than \$500,000		\$500,000 to \$999,999		\$1,000,000 to \$1,999,999		\$2,000,000 to \$4,999,999		\$5,000,000 to \$9,999,999		\$10,000,000 or More		
	Average	Count	Average	Count	Average	Count	Average	Count	Average	Count	Average	Count	Average	
PARTNERSHIPS/MEMBERSHIPS														
Does your DMO have:														
Dues-paying members	102	46.8%	4	30.8%	5	17.2%	14	36.8%	26	43.3%	14	63.6%	33	76.7%
A partnership program	82	37.6%	7	53.8%	11	37.9%	12	31.6%	19	31.7%	8	36.4%	22	51.2%
Neither	74	33.9%	5	38.5%	15	51.7%	15	39.5%	26	43.3%	3	13.6%	5	11.6%
How many dues-paying members?	99	559	4	151	5	164	13	303	26	488	13	520	32	858
% of members represented by:														
Accommodations	91	22.5%	4	26.3%	5	20.9%	11	19.7%	26	23.3%	12	20.9%	31	21.6%
Restaurants	90	17.5%	4	13.8%	5	16.2%	10	16.0%	26	16.1%	12	16.5%	31	20.9%
Retail establishments	87	9.1%	4	18.8%	5	12.8%	10	10.1%	25	8.6%	13	10.2%	29	6.8%
Event services/suppliers	79	15.7%	3	8.0%	4	13.5%	9	10.6%	23	11.8%	12	16.0%	28	21.6%
Attractions/cultural institutions	88	18.6%	4	29.0%	5	21.9%	11	22.0%	25	17.2%	12	18.5%	30	16.9%
Other	82	22.2%	2	12.5%	4	21.7%	10	27.4%	25	26.3%	13	23.4%	28	16.9%
When dues paying members re billed:														
Anniversary	44	50.6%	1	33.3%	0	0.0%	6	60.0%	11	45.8%	9	60.0%	16	64.0%
Calendar Year	23	26.4%	0	0.0%	4	80.0%	1	10.0%	8	33.3%	3	20.0%	7	28.0%
DMO's Fiscal Year	20	23.0%	2	66.7%	1	20.0%	3	30.0%	5	20.8%	3	20.0%	2	8.0%
RESERVE POLICY														
Have a Formal Reserve Policy	120	55.6%	2	15.4%	15	51.7%	21	55.3%	39	66.1%	12	54.5%	25	58.1%
If Yes, Reserve Policy Tied to:														
Set Amount	32	26.7%	1	50.0%	3	20.0%	6	28.6%	10	25.6%	2	16.7%	7	28.0%
Total Budget	40	33.3%	0	0.0%	4	26.7%	8	38.1%	17	43.6%	1	8.3%	7	28.0%
Net Asset/Fund Balance	9	7.5%	1	50.0%	2	13.3%	1	4.8%	1	2.6%	1	8.3%	3	12.0%
Combination of items	18	15.0%	0	0.0%	4	26.7%	2	9.5%	5	12.8%	5	41.7%	2	8.0%
Other	21	17.5%	0	0.0%	2	13.3%	4	19.0%	6	15.4%	3	25.0%	6	24.0%
Have a Formal Investment Policy	98	45.4%	1	7.7%	8	27.6%	13	34.2%	32	53.3%	13	59.1%	28	65.1%
Separate Bank Accounts for														
Public Funds vs. Private Funds	59	27.6%	0	0.0%	8	28.6%	11	29.7%	15	25.0%	3	13.6%	21	48.8%

Funding Sources

Investing in the DMO - Public and Private Sector Sources

Most DMOs receive the vast majority of their funding from public sources. This is especially true for smaller budget DMOs, which rely on public sources for nearly 90% of their total funding.

Over 86% of DMOs receive hotel room tax revenue, by far the leading source of public investment. Tourism Improvement District/Marketing District/Voluntary Assessments are rapidly growing as a revenue source, with 13% of DMOs receiving these funds. As for private sources, nearly half of DMOs are dues-paying membership organizations, with the percentage increasing to over 60% for the larger DMOs.



Funding Sources

DMO FUNDING/REVENUE SCHEDULE	All Respondents	BUDGET SIZE												
		Less Than \$500,000		\$500,000 to \$999,999		\$1,000,000 to \$1,999,999		\$2,000,000 to \$4,999,999		\$5,000,000 to \$9,999,999		\$10,000,000 or More		
		Count	Average	Count	Average	Count	Average	Count	Average	Count	Average	Count	Average	
REVENUE FROM PRIVATE SOURCES AS A % OF TOTAL FUNDING	199	14.3%	12	12.7%	27	12.1%	37	11.5%	60	15.5%	22	17.2%	41	15.4%
TOTAL PRIVATE FUNDING (%)	9	10.7%	0	0.0%	1	0.2%	0	0.0%	4	9.4%	1	25.9%	3	11.0%
Convention Center Revenue (Does NOT include Building Revenue)	91	7.0%	4	8.0%	5	8.2%	14	7.2%	24	9.8%	14	4.9%	30	5.4%
Membership Dues	79	4.6%	4	11.4%	8	7.2%	12	5.3%	23	5.3%	11	2.2%	21	2.5%
Print Advertising	76	4.1%	4	7.3%	10	6.3%	14	4.4%	18	4.7%	12	2.4%	18	2.4%
Partnership Revenue	4	3.9%	0	0.0%	0	0.0%	2	7.2%	1	0.7%	0	0.0%	1	0.5%
Chamber of Commerce	26	3.6%	1	0.5%	1	1.1%	4	2.1%	8	4.3%	4	5.2%	8	3.5%
Donated (non-cash) Products & Services	62	3.2%	2	0.7%	7	4.9%	7	7.1%	21	2.9%	7	2.6%	18	2.0%
Cooperative Advertising	44	2.0%	0	0.0%	2	1.4%	8	2.6%	13	1.6%	8	0.8%	13	2.7%
Corporate Sponsorships	58	2.0%	3	6.5%	2	3.8%	9	1.5%	22	1.5%	9	1.8%	13	1.9%
Event Hosting	14	2.0%	1	3.0%	1	1.5%	3	4.4%	3	2.6%	0	0.0%	6	0.4%
Publication Sales	70	1.8%	3	2.9%	7	2.0%	11	1.3%	22	1.8%	9	0.9%	18	2.2%
Visitor Information Center(s)	60	1.7%	2	0.8%	6	2.5%	8	2.9%	22	1.6%	8	1.2%	14	1.1%
DMO Website Advertising/Links	36	1.3%	0	0.0%	2	0.4%	7	0.3%	11	0.8%	2	0.4%	14	2.5%
E-Commerce	64	1.2%	2	2.6%	6	3.3%	4	0.7%	24	0.8%	9	0.8%	19	1.4%
Promotional Participation	21	1.1%	1	0.4%	0	0.0%	0	0.0%	4	1.6%	3	0.0%	13	1.2%
Convention Registration	10	0.9%	0	0.0%	4	1.1%	0	0.0%	4	0.5%	1	1.7%	1	1.0%
Building Revenue (Does NOT include Convention Center Building Revenue)	34	0.8%	0	0.0%	0	0.0%	2	1.7%	9	0.5%	4	0.3%	19	1.0%
Service Fees	97	0.2%	2	0.2%	2	0.4%	16	0.2%	37	0.2%	14	0.2%	26	0.2%
Investment Income	85	5.5%	1	5.0%	8	7.8%	10	2.9%	31	5.6%	10	13.7%	25	2.3%
Other														
FUNDING RATIOS (Medians)														
Funding per Full-Time Employee	200	\$206,057	12	\$146,842	28	\$162,332	38	\$173,357	60	\$198,451	21	\$251,364	41	\$266,544
Funding per Full-Time Equivalent Employee	201	\$187,768	13	\$135,500	28	\$143,107	38	\$154,563	60	\$178,421	21	\$214,194	41	\$243,730

Note: Data reported for each line are based on all responses other than zero. The number of respondents varies from line to line. As a result, the sum of the values will not equal the TOTAL line.



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