RECOVERY GAINS MOMENTUM

New COVID variants and staffing shortages challenged our hospitality partners, but the industry is resilient and there is cautious optimism the recovery will continue in FY22. Fiscal year lodging revenues were up 10.1% over FY20 and only down 9.9% when compared to pre-pandemic FY19 levels. These improvements were reflected in strong Q4 room tax receipts, which were capped off with an all-time record in June 2021.

FY21 began with the news that COVID restrictions would roll back slightly and, while mass gatherings were off limits, leisure travel was fueling visitor spending. Travel Lane County communicated weekly with Lane County Health and Human Services staff to align messaging and marketing efforts were focus on nearby (staycation) visitors.

Fall brought the devastating Holiday Farm Fire and smoke filled the valley putting a damper on leisure travel. Our hotel partners stepped in to assist with fire evacuees and, while clear skies returned, COVID wouldn’t release its grip and soon the statewide restrictions returned. Hospitality businesses were pivoting once again and state and federal support made the difference for many Travel Lane County partners.

Spring brought the return of track and field at the reimagined Hayward Field and once again the flame was lit in TrackTown USA. Travel Lane County, along with our hospitality industry partners in Lane County, are looking forward to a brighter FY22.

Kari Westlund
President/CEO

Mission
Travel Lane County's mission is to increase the number of overnight visitors. We market and promote the Eugene, Cascades and Coast region as a destination for travel, conventions, sports, meetings and events. We are a private, nonprofit association dedicated to economic development through visitor spending, which pumped more than $408 million into Lane County, Oregon’s economy in 2020.

Vision
Travel Lane County’s vision is to be a recognized leader in achieving year-round economic growth throughout the Eugene, Cascades & Coast region through innovative destination marketing, product development and exceptional visitor experiences. We are focused on positioning Eugene, Cascades and Coast as one of the most preferred travel destinations in the Pacific Northwest.

Brand Promise
Our brand promise is enriching, authentic, approachable experiences for all ages and abilities.

Why We Do What We Do
We believe our work inspires people to experience and appreciate Lane County, creating opportunities, a sense of place and stronger communities.
YEAR IN REVIEW

Following two consecutive calendar years of more than $1 billion in total travel spending, 2020 spending reflected the dearth of mass gatherings and leisure travel hampered by the global pandemic. Total travel spending dropped 50% from $1 billion to $523 million, while employment fell 23% to 8,610. These dramatic changes resulted in industry earnings falling more than $50 million and state and local taxes losing $10 million.

Sports event organizers worked diligently to apply safety and health guidelines and were successful in creating a small number of events that created positive impacts on lodging revenues. Over 20,000 lodging room nights were contracted to fire evacuees, generating unanticipated lodging revenues.

In the coming pages we will dive more deeply in how Travel Lane County focuses on its three target markets - leisure travelers, sports event planners and meetings and convention planners.

Direct Travel Spending

- Transportation: $83M
- Arts, Entertainment & Recreation: $32M
- Food & Beverage: $148M
- Accommodations: $98M
- Retail: $47M

Total: $408M

Source: Dean Runyan Associates, LaneCo2020p
ROOM TAX REBOUND

Transient room tax collections totaled more than $11 million and benefited the entire county. The four cities highlighted in the map indicate the municipalities that have enacted additional local ordinances raising the room tax rate above the 8% countywide rate. Travel Lane County’s agreement with Lane County directs 2.1 points of the room tax be dedicated to tourism marketing.

Record transient room tax growth came to an end late in FY20, but FY21 immediately began showing positive signs and by year-end had exceeded projections. June 2021 receipts set an all-time record of $2.1 million and added to a strong 4th quarter, which allowed the region to regain one-half of the FY20 losses. Leisure travel was stronger than anticipated early in the fiscal year, which resulted in welcome demand for our coastal partners. Metro area hotels suffered as gatherings associated with sports events, conventions and meetings, performing arts and fairs and festivals were canceled or became virtual events. Increasing vaccination rates began creating opportunities for events to return late in the fiscal year and this meant opportunities to leverage track and field events that filled hotel rooms throughout the metro area and provided the region a needed shot in the arm. Travel Lane County’s FY21 efforts resulted in an estimated economic impact of $56.3 million.

TRT Received By Jurisdiction

<table>
<thead>
<tr>
<th>Jurisdiction</th>
<th>FY21 Revenue</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eugene</td>
<td>$4.9 Million</td>
</tr>
<tr>
<td>Springfield</td>
<td>$2.6 Million</td>
</tr>
<tr>
<td>Florence</td>
<td>$1.1 Million</td>
</tr>
<tr>
<td>Cottage Grove</td>
<td>$257K</td>
</tr>
<tr>
<td>All Other Lane County</td>
<td>$2.2 Million</td>
</tr>
</tbody>
</table>
OUT OF THE BLOCKS

It felt like a marathon or an ultra-marathon, but the organization stayed the course and leaned into its relationships with employees, partners, board of directors and key stakeholders. Adhering closely to a phased approach (Wait, Ready, Set, Go), and coordinating this approach to the Governor’s reopening phases, the organization moved from an initial #LoveLane campaign that focused on how to assist our partners navigate the ever-changing COVID restrictions, to an Instilling Confidence in Travel campaign that yielded encouraging results.

Working with our Chamber of Commerce partners allowed the region’s businesses to access timely and critical information regarding trainings, local/state/federal resources, and more. The success of this collaboration was recognized with each Lane County Chamber of Commerce receiving a 2021 Travel Lane County Tourism Ambassador Award.

Arriving at the Go phase took the better part of the fiscal year, but efforts to expand paid marketing to nearby drive markets proceeded in Q4 and the results were immediately positive. Moving into FY22, advertising to further drive markets and fly markets is poised to inspire further leisure travel to the region.
INTEGRATED MARKETING

Creative & Content

760 new media requests and partners during FY21.

Our image and video library is key to our ability to make sure our destination shines. More than 8,000 image and video downloads from our asset library served a variety of projects on our owned channels, media requests and partners this year. A strong library of assets allowed the creative team to leverage a last-minute opportunity to create a broadcast spot to air on ESPN during a national track meet.

Website

966,000 web sessions
761,000 users

Website sessions remained consistent throughout the year, with the final quarter showing a 15% increase in sessions and a 19% increase in users from pre-pandemic FY19 levels. A targeted approach to page content led to strong performance of key performance indicators, with views of partner deals and offers, lodging partner referrals and booking engine searches all trending up from FY20 levels.

8,865 Views of partner deals and offers

110%

20,657 Lodging partner referrals

8%

12,210 Booking engine searches

24%
The first half of FY21 challenged the leisure marketing team as campaigns started, were interrupted by wildfires and spiking COVID cases, and then were restarted. Hyper-local messaging encouraged residents to take a “staycation,” support local businesses and explore opportunities in our own backyard. Campaign metrics showed that residents were doing their part and our partners in Florence were experiencing what looked like normal summer travel volumes.

Staycation and holiday promotions successfully generated bookings and response to targeted deals was encouraging. The second half of the fiscal year provided greater opportunities to promote travel to drive markets and campaigns focused on winter getaways and springtime road trips.

Leisure social channels were active and growing throughout the year as a total of 304,710 followers/fans/visitors connected with our five channels. The biggest gains were seen in blog views (up 63%), while overall social media reach topped 1.2 million unique users. Facebook reach was the lion's share of these users totaling 932,148.
CONVENTIONS - GOING VIRTUAL

Convention marketing staff developed new branding assets that aligned with existing campaigns and supported meeting safety during the pandemic. This effort transitioned over the course of the year as meetings began to return. Meeting venues reopened to civic groups, weddings and very small conventions as COVID case counts dropped and people began feeling comfortable meeting in-person.

Local event venue video assets were developed for the Lane Events Center and Venue 252 during the first half of the year and shared with meeting planners through a Virtual FAM webinar. An additional three videos were completed during the second half of the year. These videos noted safety protocols instituted during COVID and highlighted the terrific amenities our venues offer meeting planners.

The Booking Business Task force, a cohort that includes large venue operators, Travel Lane County conventions staff and area hoteliers, created a Eugene/Springfield Metro no cancellation policy to allow planners the freedom to book events without worrying about potential COVID cancellation issues. Additionally, Travel Lane County offered a rebate program for new events with a minimum of 200 picked up room nights that are booked prior to June 30, 2022.

While FY21 did not provide an environment in which conventions and meetings could thrive, staff is excited to see the number of rebooked events and new event interest that occurred late in the fiscal year and is anticipated to continue through FY22.

<table>
<thead>
<tr>
<th>Confirmed Events</th>
<th>11</th>
</tr>
</thead>
<tbody>
<tr>
<td>Estimated Attendance</td>
<td>1,692</td>
</tr>
<tr>
<td>Estimated Economic Impact</td>
<td>$4.6 Million</td>
</tr>
</tbody>
</table>
SPORTS - SAFETY FIRST

Eugene, Cascades & Coast Sports Commission staff were actively involved in helping to define and establish safe and manageable protocols for outdoor regional sporting events and also helped planners with strategies for meeting the required protocols.

The final month of the fiscal year brought cheers within the offices of the Eugene, Cascades & Coast Sports Commission as fans were finally able to experience the reimagined Hayward Field at the University of Oregon. Following a quiet collegiate track and field season, the NCAA Division I Outdoor Track & Field Championships and the U.S. Olympic Team Trials - Track & Field returned to Hayward Field and filled area hotels. These meets were followed by the NSAF National Championships featuring high school athletes from across the nation. Future booking of the NCAA meet (2024-27) will result in nearly $26 million in economic impact and the NSAF will be back for the next seven years.

Underlying these large events were many local tournaments and events that generated room nights for area lodging partners. Area event organizers were attentive to the safety and health restrictions enacted by the state, which provided opportunities for youth and adults to stay active.

**Confirmed Events**

40

**Estimated Attendance**

35,166

**Estimated Economic Impact**

$32 Million
DESTINATION DEVELOPMENT

Staff stayed connected to local communities as stakeholder groups pivoted to virtual meetings. This included regular meetings of Chambers of Commerce and tourism committees, along with online workshops and conferences focusing on rural development.

Guidance and letters of support, for multiple local communities and stakeholders, was provided for those applying for Travel Oregon’s Destination Ready grants and other COVID recovery funds.

Working alongside McKenzie River community members, staff developed a map of outdoor recreation amenities that were lost or damaged during the Holiday Farm fire and remained connected to ongoing recovery efforts by participating in the McKenzie River Tourism Committee’s work to promote surviving businesses as well as seeking funding for recovery efforts.

Staff from Travel Lane County, the Florence Area Chamber of Commerce and the Oregon Coast Visitors Association teamed up to develop the Central Coast Food Trail. With the participant list finalized, printing of the trail brochure and website content will come to life in early FY22. Eight Lane County businesses and 31 Lincoln County businesses are featured in the trail and online information will live alongside other coastal food trail information on the Oregon Coast Visitors Association website. Additionally, South Willamette Valley Food Trail participants were recruited to participate in a “Holiday Gift Box” promotion during the winter season. Multiple partners contributed items that were then packaged and sold by Provisions Market Hall. With funding through the Willamette Valley Visitors Association and Travel Oregon, the South Willamette Food Trail brochure was redesigned and will be available in Summer 2021.

Infrastructure and economic recovery work continued as staff participated in a number of planning processes and on chamber of commerce committees. This included Lane County Parks Funding Task Force, the Lane County Bicycle Master Plan, Willamette River Water Trail steering committee and the Oregon Dunes Restoration Collaborative steering committee.

Late in the fiscal year, a Tourism Infrastructure District discussion was launched to align community and industry priorities and goals for future tourism development in the metro area.

Partnering with the Eugene and Springfield Chambers of Commerce, the University of Oregon, the cities of Eugene and Springfield and the Eugene Airport, Southwest Airlines service was secured and will start in August 2021. Additional air service expansion saw new airline avelo airlines begin direct service to Hollywood/Burbank, daily non-stop service to Dallas/Fort Worth on American Airlines and announcements of a return of seasonal non-stop service to Palm Springs on Allegiant Air. Losses during the pandemic include United’s Chicago connection (anticipated to return in 2022) and Alaska’s PDX connection, which is not scheduled to return. These changes, along with the potential for additional service announcements in the coming year, position the Eugene Airport to exceed the record number of enplanements they were experiencing pre-pandemic.
EARNED MEDIA

**Impressions** 9.3 Million

**Articles** 116 Articles

**Value** $27,605

STAKEHOLDER RELATIONS EXPANDS ROLE

Stakeholder Relations took a lead role in coordinating with our Chambers of Commerce to support members and partners across all these organizations. A COVID resource blog was established and communications were adjusted to provide weekly industry updates. These updates were actively accessed by partners, as evidenced by a 38% open rate. Training opportunities were made available to partners during the first half of the fiscal year while additional training focused on assisting partners prepare for reopening.

Board approval to defer dues payments, from partners hardest hit during the pandemic, allowed the organization to retain a high percentage of our partner base. Reengaging lost partners and approaching new partners will be a focus in FY22.

An organizational redesign resulted in visitor services and destination development functions being added to Stakeholder Relations. The Adventure Center in Springfield was closed during the pandemic and visitor services was consolidated at the downtown Eugene visitor center. Phone service was provided throughout the pandemic and door service was made available to visitors as restrictions were eased. Full visitor center operations returned over the Memorial Day weekend in 2021 and seven-day per week visitor services has been maintained since.

Earned media opportunities were challenging as the media landscape continued shifting and story content was limited during the pandemic. A boost in stories occurred late in the year as events began returning to our event calendar and strong leisure travel positively impacted economic activity.
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Eugene

Kari Westlund  
Travel Lane County  
Lane County

Thomas Wuest, MD  
Slocum Center for Orthopedics & Sports Medicine  
Eugene
TRAVEL LANE COUNTY STAFF

Administration
Kari Westlund
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Liz Bocking
Vice President of Finance & Administration

Destination Marketing
Natalie Inouye
Vice President of Destination Marketing

Convention Sales & Marketing
Juanita Metzler
Senior Director, Conventions

Phillis McLennan
Director of Conventions & Sports Marketing

Linda Norris
Director of Convention Services

Eugene Cascades & Coast Sports Commission
Joey Jewell
Senior Director, Sports Commission

Jessica Joyce
Director of Event Operations

Katie Morton
Sports Sales & Marketing Coordinator

Tourism Sales & Marketing
Stephen Hoshaw
Senior Director, Tourism

Meg Trendler
Director of Tourism Sales

Julia Voigt
Tourism Marketing Manager

Integrated Marketing
Emily Forsha
Vice President of Integrated Marketing

Taj Morgan
Director of Content Strategy

Melanie Griffin
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Visitor Services
Megan Temple
Visitor Center Manager

Brian Saunders
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Jenae Steele
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Stakeholder Relations
Andy Vobora
Vice President of Stakeholder Relations

Maxine Walton
Director of Partnership Development

Hayley Radich
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Jeff Malik
Destination Development Manager