



LANE COUNTY

DESTINATION MASTER PLAN

July 2026

TABLE OF CONTENTS

INTRODUCTION	4
EXECUTIVE SUMMARY	6
MARKET STUDY	11
PILLARS AND RECOMMENDATIONS	40
SUSTAINABLE TOURISM FRAMEWORK	88
PHASED IMPLEMENTATION PLAN & KPIS	94
CONCLUSION: A VISION FOR A RESILIENT LANE COUNTY	109
APPENDIX	110



Dan Fenton
Managing Director
Dan.Fenton@jll.com
+1 408-309-3450

Shirin Jafari
Vice President
Shirin.Jafari@jll.com
+1 415-830-2484

Mary Isgro
Lead, Sustainability and Resiliency
Mary.Isgro@jll.com

Ladan Ghahramani
Consultant



Samara Phelps
President & CEO
samara@eugenecascadescoast.org
541-743-8750

Emily Forsha
Executive Vice President
emily@eugenecascadescoast.org
541-743-8752



Introduction

Letter from the Travel Lane County Board of Directors



Credit: Gwyneth Manse

Building Lane County’s Future Together

Dear Community Members, Partners, and Stakeholders,

For more than a year, we have been asking questions and, more importantly, listening to answers. This document is the result of that conversation, a Destination Master Plan built not from assumptions, but from the voices of over 100 business owners, public agency leaders, community advocates, and more than 1,300 residents who shared their experiences, frustrations, hopes, and ideas for Lane County’s future.

That process confirmed something the data made undeniable: the people who live here love this place, and they understand its economic value. Nearly 8 in 10 residents told us tourism is vital to their local economy. An equal number rated its overall impact as positive. Residents aren’t asking us to slow down — they’re asking us to be smarter about how growth translates into jobs, infrastructure, and quality of life for the people who live here. Tourism is a critical economic driver that supports our workforce, sustains thousands of small businesses, and generates vital revenue that funds community services and infrastructure investments across Lane County. We possess extraordinary assets: world-class natural landscapes, elite athletic facilities, vibrant arts and culture, and authentic communities that span from the Pacific Coast to the Cascade Mountains. Yet we also face challenges that go beyond tourism. Pronounced seasonal volatility makes it hard for businesses to staff up and stay viable year-round. Infrastructure gaps limit access to communities that could benefit most from visitor spending. And too often, the economic case for tourism investment hasn’t been made clearly enough. That disconnect is not about data; it is about communication, coordination, and ensuring that tourism growth genuinely benefits the people who live here, not just the people who visit.

We commissioned this plan because we believe Lane County can become a better destination. Not by chasing more visitors at any cost, but by being smarter, more strategic, and more collaborative about how welcoming visitors strengthens our community. We wanted to understand not just where we were, but where we could be and what it would take to get there.

What emerged are seven strategic pillars that balance ambition with practicality. These pillars address everything from foundational infrastructure and year-round economic stability to community well-being and a more compelling regional brand. Some recommendations can begin immediately. Others will require years of partnership, funding, and political will. All of them require something we heard requested repeatedly: working together.

This plan does not belong to Travel Lane County alone. It belongs to every community across Lane County interested in learning more about tourism and its benefits on local residents. Our commitment is this: we will use this plan as a roadmap, not a mandate. We will convene the conversations, provide the data, advocate for the investments, and coordinate the collaborations needed to move these pillars forward. But we cannot and should not do it alone.

To the 1,300 residents who completed our community survey: thank you for your candor. To the Steering Committee members who guided this process through months of meetings: thank you for your wisdom. To the focus group participants, interviewees, and site visit hosts: thank you for your time and trust.

Tourism is one of Lane County’s most significant economic engines, and the opportunity in front of us is real. When done well, it creates jobs across sectors, supports small businesses, and makes Lane County the kind of place people choose, not just for a weekend, but for a degree, a career, or a life. For elected officials, city and county leaders, and economic development partners, this plan is a roadmap built for you to use, not to read once and set aside, but to bring to budget conversations, planning processes, and investment decisions. But it only works if the people with the authority to act on it see it as their plan too. We hope you do.

With gratitude and commitment, Travel Lane County Board of Directors



Credit: Courtesy of @deafjourney

Executive Summary

Overview

The Lane County Destination Master Plan is the result of a year-long collaborative planning process involving over 100 stakeholders, 1,300 resident survey responses, and comprehensive analysis of nearly 1,000 tourism-related data points. This plan provides a strategic roadmap for developing Lane County into a year-round, economically resilient, and community-supported destination.

Where We Are

Tourism is a significant economic driver in Lane County: the industry supports one in nine local jobs, and 79 percent of residents view it positively. Lane County possesses extraordinary assets: world-class outdoor recreation spanning coast to mountains, culinary, wine and beer, elite athletic facilities and authentic cultural experiences.

Yet critical challenges constrain our potential. Severe seasonal volatility creates challenging economics: 43 percent of major events compress into summer while winter accounts for only 19 percent. Infrastructure gaps limit visitor experience: Lane County ranks towards the low side of its peers in hotel meeting space and lacks the indoor facilities needed for year-round programming. Transportation barriers prevent visitors from easily accessing rural Willamette Valley, coastal and mountain communities. And despite strong community support, businesses operate in silos with limited coordination, while major event attendees often remain confined to event footprints without exploring the broader county's attractions and communities.

The Path Forward: Seven Strategic Pillars

This plan identifies seven interconnected pillars, each supported by specific, actionable recommendations. The pillars are presented thematically, not in order of priority.

- 1. Close the Infrastructure Gap:** Develop the foundational infrastructure needed to support a year-round visitor economy by championing a premier indoor events facility, activating underutilized waterfronts, improving amenities in key rural and recreation areas, and expanding lodging options.
- 2. Build a Year-Round, County-Wide Visitor Economy:** Reduce economic seasonality by developing new signature winter events and implementing strategies that disperse visitors from major events into communities across the county.
- 3. Invest in Tourism that Supports Resident Quality of Life:** Strengthen tourism's positioning by directly investing in resident quality of life through initiatives that strengthen visitation while addressing community priorities such as downtown vibrancy, workforce development, and transparent impact monitoring.
- 4. Improve Transportation Around the Region:** Overcome critical transportation gaps by developing a network of accessible, car-free mobility options, including regional shuttles, trail connections, and micromobility, that make it easier for visitors to move between demand drivers, attractions, and the communities and businesses connected to them.
- 5. Champion Strong Regional Branding and Marketing:** Evolve the regional brand from a geographic description into a compelling, experience-led identity, creating a collaborative marketing framework that allows all communities to align with a unified and emotionally resonant story.
- 6. Convert University of Oregon Visitors into Lane County Visitors:** Expand the University of Oregon's role from a demand driver to an active partner by creating formal channels to convert UO-affiliated visitors into regional explorers who stay longer and spend more across the county.
- 7. Connect the Industry:** Unify the tourism sector by creating formal structures for collaboration, such as a Destination Stewardship Council and industry roundtables, to ensure all partners are aligned and empowered through shared data and a unified vision.

Implementation Approach

The plan is designed for realistic, phased implementation over 10 years. Short-term recommendations focus on collaboration and coordination that can begin immediately. Medium-term initiatives scale successful pilots and pursue infrastructure projects with identified funding. Long-term transformational projects, like the indoor multi-use facility, will require sustained partnership and investment across multiple years.

Success will be measured through hotel occupancy in shoulder seasons, visitor spending distribution across communities, resident sentiment scores, event calendar balance, and industry collaboration participation.

Moving Forward Together

Lane County has the ingredients for success. The region’s residents, businesses, and communities have already said clearly what they need, and this plan reflects that. What comes next is a genuine opportunity for those who shape this region’s future to lead on it. Tourism is not a peripheral industry here. It is central to how Lane County grows, who benefits from that growth, and whether the communities across this region can build economic resilience. This plan is the roadmap. The moment to act on it is now.



Credit: Melanie Griffin

Market Study

Overview

JLL’s approach to strategic planning uses a four-phases approach: listening, analyzing, strategizing, and activating. To ensure a comprehensive approach to this plan, the Lane County Destination Master Plan integrates insights from existing community plans initiatives, stakeholder engagement, and market research to develop a clear vision and strategy. JLL leveraged proprietary planning products, extensive stakeholder feedback, as well as research and data provided by Travel Lane County to better understand the destination. Throughout the year-long planning process, extensive qualitative and quantitative market research was conducted to gain an in-depth understanding of the current state of the tourism landscape across the county and identify potential areas for growth.

The Market Study section includes quantitative and qualitative research that has been detailed further and organized under the following categories:

JLL-Conducted research components:

1. **Stakeholder Engagement:** This section incorporates feedback from multiple methods outlined here. JLL would like to thank and recognize the high level of interest from the over 100 participants in focus groups, committees, and one-on-one interviews.
2. **Tourism Readiness Index:** Detailed data analysis process which used nearly 1,000 data points across Lane County and 12 comparable destinations to assess the readiness and capacity of the tourism industry in Lane County. The Typology outcome placed Lane County in the “Emerging Performers” category, a destination with growing momentum potential, and opportunities for further strategic development and enhancing the tourism infrastructure.
3. **Demand Driver Scorecard:** Evaluation identified 37 key assets and experiences driving visitor demand in the destination.
4. **Event Matrix:** Evaluation which identified 23 key events driving visitor demand in the destination.

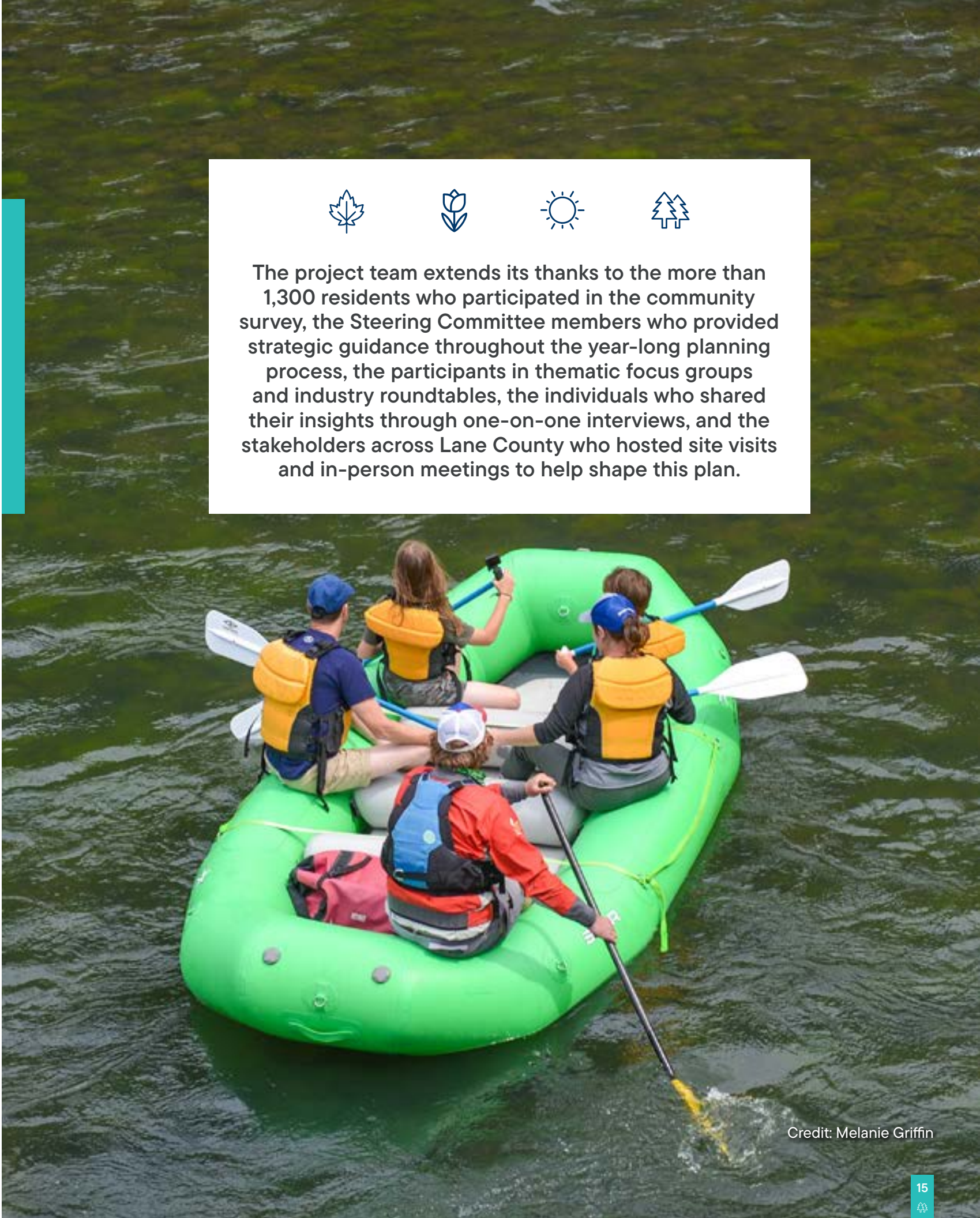
Stakeholder Engagement

The qualitative data informing this report was gathered through a multi-pronged engagement strategy designed to capture a wide range of perspectives, including more than 100 virtual and in-person engagements, and 1300+ responses to the resident survey. The following methods were employed:

- **Steering Committee Meetings:** These sessions served as a forum for high-level strategic guidance, review of quantitative data, and identification of major county-wide development priorities from key industry and community leaders. Over 10 meetings were held throughout the planning process with a Steering Committee of 18 members who represented a cross-section of Lane County's tourism ecosystem, including lodging and hospitality, wineries and agritourism, arts and culture organizations, visitor attractions, outdoor recreation providers, major events, event production, local and county government, chambers of commerce, workforce development, parks and recreation, and the University of Oregon.
- **Thematic Focus Groups:** Five distinct focus groups were conducted to gather detailed, sector-specific insights from business owners, operators, and subject-matter experts. The groups were organized by themes:
 - › Outdoor Recreation
 - › Events
 - › Transportation
 - › Attractions, Arts & Culture
 - › Food & Beverage



- **In-Person Industry Roundtables and Site Visits:** During multiple site visits across Lane County in May and October 2025, the project team conducted in-person convenings and facility tours to facilitate direct dialogue with stakeholders and gain firsthand understanding of the destination’s assets and infrastructure:
 - › **Lodging Roundtable:** Brought together hotel general managers, property owners, and hospitality management companies to discuss infrastructure needs, seasonal occupancy challenges, workforce issues, and opportunities for collaboration.
 - › **Sports Tourism Roundtable:** Convened representatives from youth sports clubs, event organizers, and athletics organizations to assess facility capacity, tournament attraction potential, and coordination opportunities.
 - › **Site Visits:** Project consultants conducted site visits to various communities and attractions across Lane County and met with more than 30 community leaders, business owners, and operators in Eugene, Springfield, Florence, Oakridge–Westfir, and McKenzie River communities to understand local priorities, challenges, and opportunities.
- **One-on-One Interviews:** 30+ targeted interviews were conducted with key stakeholders to provide a deeper, more confidential forum for discussing specific challenges and opportunities.
 - › **Sample List of Stakeholders Engaged:**
 - **Tourism & Hospitality Operators:** Owners/General Managers of hotels in Eugene, Springfield, and Florence, owners of rafting, fishing, and sandboarding businesses.
 - **Public Agencies & Transit:** Leaders from Lane Transit District (LTD), ODOT (Active Transportation), Lane County Emergency Management, and Lane Council of Governments.
 - **Government Officials:** Lane County Commissioners for Districts 2, 4, and 5.
 - **Outdoor Recreation Managers:** Recreation Program Managers from Willamette and Siuslaw National Forests.
 - **Cultural & Nonprofit Leaders:** Representatives from the Black Cultural Initiative, Eugene Symphony, The Shedd, and McKenzie Trail Volunteers.
 - **Sports Organizers:** Leadership from TrackTown USA, Springfield Drifters, new pickleball development, and local youth sports clubs (soccer, volleyball).
 - **Educational Institutions:** University of Oregon (UO) Athletics and Enrollment Management.
- **Resident Survey:** The resident survey was administered through a combination of the CINT Exchange online research panel and Travel Lane County outreach channels between October 28, 2025, and January 31, 2026. The survey included 18 questions designed to capture resident perspectives on tourism’s impacts, areas for improvement, and priorities for future tourism-related investments and initiatives.
 - › A total of 1,300 responses were collected, including 1,269 respondents who identified a Lane County ZIP code as their primary place of residence.
 - › Responses were received from residents across Lane County communities, including Eugene (704), Springfield (204), Creswell–Cottage Grove (93), Rural Willamette Valley (80), McKenzie (75), Florence (64), and Oakridge–Westfir (49), with 31 responses from outside Lane County. The final dataset was weighted to ensure balanced geographic representation across the county.



The project team extends its thanks to the more than 1,300 residents who participated in the community survey, the Steering Committee members who provided strategic guidance throughout the year-long planning process, the participants in thematic focus groups and industry roundtables, the individuals who shared their insights through one-on-one interviews, and the stakeholders across Lane County who hosted site visits and in-person meetings to help shape this plan.

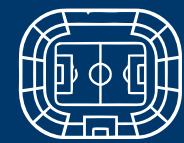
Credit: Melanie Griffin

Key Findings from Stakeholder Engagement

Stakeholder engagement highlighted several key findings about Lane County:



Unique Geographic Diversity: Lane County benefits from geographic diversity and distinct microclimates, with close access to the Pacific Ocean, coastal dunes, rivers, valleys, and the Cascade Mountains. These varied landscapes are all within relatively short driving distances, allowing residents and visitors to experience multiple environments in a single trip. Together, this geographic range supports year-round outdoor recreation, including winter activities and strong shoulder-season experiences.



Established Sports Identity and Major Events: The region is anchored by strong global branding, specifically the “TrackTown USA” identity and the world-class Hayward Field facility. A robust portfolio of successful major events, such as the Eugene Marathon and University of Oregon athletics, consistently drives visitation.



Accessibility Leadership: The county is positioned to become a national leader in accessible travel, anchored by organizations like Mobility International USA (MIUSA), a Eugene-based global leader in disability rights and international exchange programs. The region features initiatives like trail accessibility and hearing loops at venues like The John G. Shedd Institute for the Arts.



Strategic Location and Growth: Lane County benefits from strong access: its I-5 corridor location draws regional travelers, and Eugene Airport is a well-connected regional gateway that is actively expanding to reach new markets.



Economic Pressures on Businesses: Local businesses face significant financial challenges across multiple fronts, including high insurance premiums, regulatory and tax burdens, and broader business climate concerns. At the same time, a shortage of affordable housing and relatively low regional wages make it difficult to attract and retain a stable tourism and hospitality workforce.



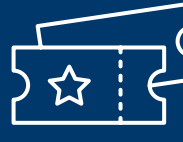
Infrastructure and Asset Needs: A notable limitation on year-round visitation is the lack of a large, multi-use indoor facility for sports, events, and meetings. There is also a widespread need for improved foundational amenities across the county, including accessible public restrooms, adequate parking, and clear wayfinding signage, as well as greater investment in the maintenance and stewardship of existing public assets such as campgrounds, historic infrastructure, and underutilized downtown buildings.



Transportation Gaps: Key transportation connections remain limited, creating mobility challenges at two distinct levels. First, stakeholders highlighted the need for more reliable transit connecting Lane County’s distinct communities, such as linking the Eugene Airport to visitor hubs and improving public transit between the metro area and rural destinations like Florence, Cottage Grove, and Oakridge-Westfir. Second, once visitors arrive in a community, navigating without a car is difficult, especially for visitors with disabilities, due to a reported lack of wheelchair-accessible rideshare and taxi options.



Downtown Eugene Environment: The feedback from stakeholders reveals a concern for the visitor experience and perception in downtown Eugene that may be constrained by a lack of late-night dining and activity, leading to a limited sense of vibrancy in the evening hours. Perceptions of public safety, tied to the visible unhoused population, are also noted as a deterrent for visitors and locals.



Event Economy Volatility: Stakeholders perceive the region’s economy as experiencing uneven patterns, with major events viewed as driving hotel price spikes that may deter other tourism. Large events are also seen as operating in self-contained areas, limiting perceived economic benefits to local businesses beyond the immediate event footprint.



Meetings, Incentives, Conferences, and Exhibitions (MICE) and Lodging Needs: The destination currently lacks large-scale convention facilities capable of accommodating events with 500 or more attendees. The absence of a full-service headquarter hotel adjacent to the Lane Events Center also presents logistical challenges for event planners.



Marketing and Destination Identity: The county’s overarching brand identity is perceived as generalized, making it difficult to define a specific reason to visit beyond the area’s natural beauty and sports. Stakeholders report that high-quality local culinary and cultural assets appear to be under-promoted, which they believe leaves these offerings unknown to both current travelers in the region and potential visitors.



Industry Coordination: The local tourism industry experiences fragmentation, with businesses often operating in silos. This limited coordination hinders cross-promotion and makes it difficult for operators to align effectively with event timing and visitor demand.

These key themes provide a consolidated overview of the insights gathered, serving as the primary evidence base for the strategic priorities detailed in this plan. Through this comprehensive stakeholder engagement process, the Destination Master Plan ensures that its goals are grounded in the tangible needs of the community and that the regional vision is validated by those who operate the businesses and public assets that define the destination.

Tourism Readiness Index

Overview

The first phase of the Market Study process involved an in-depth analysis of Lane County as a destination based on the Tourism Readiness Index. The Tourism Readiness Index is an analysis tool developed collaboratively by JLL and the World Travel & Tourism Council (WTTC). The Index offers destinations an opportunity to evaluate and comprehend their own tourism preparedness based on 70 essential data points that directly influence the tourism industry. The indicators evaluate the current state of Lane County’s tourism industry and identify potential areas for future growth.

The assessment encompasses research into various aspects within a destination’s landscape, including traditional hotel performance metrics, infrastructure and capacity building, environmental sustainability requirements, and more. With the insights provided by the Tourism Readiness Index, destinations can gain a thorough understanding of growth readiness, enabling informed decisions and optimization of tourism strategies.

A comprehensive analysis was conducted on Lane County and 12 comparable and aspirational destinations, examining a total of 70 indicators. The process resulted in the collection and organization of nearly 1,000 data points. All sources included were vetted by JLL and WTTC.



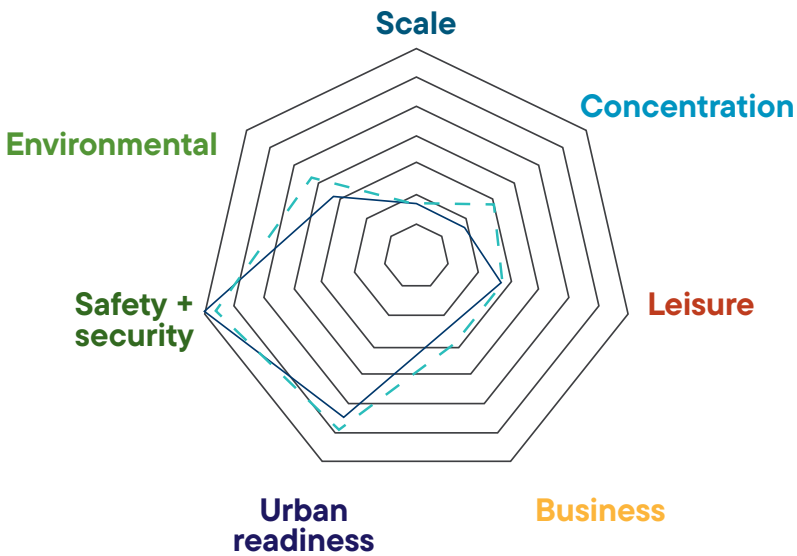
Credit: Melanie Griffin

The Tourism Readiness Index analyzed data in the following categories:

- **Scale:** Measures the size and capacity of the destination’s tourism infrastructure, reflecting its ability to accommodate visitors.
- **Concentration:** Evaluates the geographic clustering and density of visitor attractions and amenities within the destination, measuring how closely hotels, restaurants, entertainment venues, and attractions are grouped together in walkable districts and activity nodes.
- **Leisure:** Assesses visitor spending patterns, destination attractiveness, and the quality of cultural heritage sites, natural landmarks, and retail offerings.
- **Business:** Examines the maturity and contribution of the business travel segment to overall destination activity.
- **Urban Readiness:** Captures infrastructure investments that enhance internal mobility, making the destination more accessible and attractive to business, talent, and tourists.
- **Safety and Security:** Reflects the destination’s commitment to visitor and resident safety through comprehensive policies and operational practices.
- **Environmental Readiness:** Measures sustainability prioritization through strategic frameworks, policy implementation, and destination positioning on environmental stewardship.

These seven categories each incorporate up to 10 data points that are grouped to create the pillars of tourism readiness. The data points in each pillar are weighted and scored. The outcomes from this analysis determine what features of the destination need to be prioritized to ensure long-term smart growth to positively impact the local economy through tourism’s benefits. See [Appendix](#) for further details on the Tourism Readiness Index methodology.

How to Read This Chart: The solid line shows Lane County’s current performance across key tourism readiness factors, while the dotted line represents the competitive average of peer destinations. Areas where Lane County’s solid line extends beyond the dotted line indicate competitive strengths; areas where it falls short reveal opportunities for improvement.



Credit: Wyatt Pace



Credit: Deigh Bates

Results

The Tourism Readiness Index indexed Lane County across 12 comparable destinations and 70 data points. Overall, Lane County demonstrates mixed performance relative to the peer group, with notable strengths in safety & security, scale, and leisure, while showing opportunities for development in infrastructure and business travel capacity.

In-depth analysis of data from reputable global databases such as Centre for Aviation, CoStar, Oxford Economics, TripAdvisor, and more shed light on the factors contributing to Lane County’s readiness for tourism. Several data points contribute to the area’s relative strength in safety and security, environmental quality, and overall ease of navigation. These include lower levels of congestion, a manageable urban scale that supports accessibility, strong access to outdoor natural assets, and a consistent base of visitation driven by the University of Oregon. Together, these factors support a destination that is safe, accessible, and well-positioned as an outdoor-oriented market.

Conversely, certain data points contribute to underperformance in areas such as the overall supply and concentration of hotel rooms, availability of full-service and upscale accommodations, volume and clustering of visitor attractions, and the availability of large-scale meeting and event space. Additional gaps include lower levels of business travel demand, a smaller corporate base, and limited density in walkable districts that support dining, retail, and entertainment. These insights provide opportunities for targeted investment and development to strengthen Lane County’s overall tourism readiness and competitiveness.

Critically, many of the infrastructure and development priorities identified through the Tourism Readiness Index directly align with broader economic development objectives. The Urban Readiness pillar, for example, measures investments in transportation infrastructure, walkable mixed-use districts, and quality-of-place amenities; factors that are equally essential for attracting and retaining businesses and talent. Similarly, the Business pillar evaluates corporate density, convention facilities, and business travel infrastructure, which are foundational for both meeting and event tourism and for supporting a diverse regional economy. Tourism readiness and economic competitiveness are mutually reinforcing strategies for building a more resilient destination.

The combination of solid foundational assets alongside notable infrastructure and capacity gaps positions Lane County as an “Emerging Performer.” An “Emerging Performer,” as defined within Tourism Readiness Index framework, is a destination that has progressed beyond foundational development into a significant growth phase. These locations are characterized by developing infrastructure, accelerating visitor demand, and a clear government focus on prioritizing the tourism sector through policy and investment. While they have established some tourism capacity, their primary focus is now on managing this growth sustainably, scaling their offerings, and strengthening their unique brand identity to solidify their competitive position in the global market. This presents a valuable opportunity to more intentionally shape future growth by integrating sustainability and stewardship principles into ongoing planning and development efforts. Building on its existing assets and infrastructure, Lane County can further align tourism with community priorities, protect natural and cultural resources, and guide development in a way that supports long-term resilience and destination quality.

Demand Driver Scorecard

Overview

The tourism strategic planning process utilized JLL's proprietary Demand Driver Scorecard to evaluate the impact of individual assets and experiences and future investment opportunities. The Demand Driver Scorecard is designed to establish a baseline and identify investment prospects within the tourism sector. Strategic planners, investors, and developers gain the ability to make informed decisions backed by robust data and analysis. The Scorecard assists destinations in strategic planning and guides stakeholders in the formulation of targeted marketing to maximize returns.

This scoring process was based on an evaluation which includes:

- **Multistep Assessment:** Evaluating and assigning points to each attraction or experience against eight key criteria, including current visitor demand levels determined through review volumes on platforms like TripAdvisor and Google Maps and visitation data where available from attraction operators, event opportunities, engaging visitor experience and more (further detail outlined in [Appendix](#)).
- **Categorization as Attractions vs Attractors/Demand Generators:** Categorizing assets as attractions or attractors based on a scoring system of 0-100.
- **Scoring:** Classifying each attraction into a category based on overall points score. Categories were Little to no visitor interest (0-20), Interesting to do on a repeat visit (20-40, “Must see” if in the area (40-60), Regional attractors (60-80), National attractors (80-95), and Global attractor (95-100). Scoring above 60 indicates assets or experiences as an attractor.
- **Categorization of each Demand Driver:** Segmenting assets into 13 unique market categories based on specific criteria and characteristics, including family-friendly attractions, museums, entertainment, educational attractions, outdoor recreation, and more. Assets could be assigned to multiple relevant categories.

Categorization of a destination's demand drivers helps assess the visitor experience, assists in strategic planning, identifies areas for future development or revitalization projects, and enables the prioritization of enhancements to visitor-facing attractions.



Results

The Lane County Demand Driver Scorecard process assessed 75 attractions and experiences located throughout the county, identified through input from the Travel Lane County internal team, the Steering Committee, desktop research, and JLL site visits.

The results show that 49% of the scored assets are generating regional demand. 11 attractions and experiences are identified as national demand drivers: Hayward Field, Autzen Stadium, Oregon Dunes National Recreation Area, Siuslaw National Forest, Heceta Head Lighthouse, Willamette National Forest, the McKenzie River Trail, Sea Lion Caves, and area mountain biking, kayaking/canoeing, and sandboarding experiences. These nationally significant assets reinforce Lane County’s positioning as a destination defined by world-class outdoor recreation and major sporting events.

According to the analysis, 72% of assets scored in the region are considered family-friendly, with 50% of these assets driving regional demand.

Approximately 53% of the assets assessed fall within the outdoor recreation category, underscoring the region’s strong positioning as a nature-based destination. Of these assets, 55% are considered demand drivers.

Iconic landmarks and scenic destinations also play a critical role in attracting visitors. Approximately 36% of assessed assets fall within the “unique landmark” category, and 59% of these landmarks generate regional demand. Well-known destinations such as the Oregon Dunes, Heceta Head Lighthouse, and Thor’s Well contribute strongly to the county’s visual identity and serve as highly shareable and recognizable destinations that draw first-time visitors.

The analysis also highlights the key role of event and entertainment infrastructure, with 20% of assets falling within the entertainment, nightlife, and spectator sports category, and 60% of these assets driving demand. Major venues such as Hayward Field, Autzen Stadium, Matthew Knight Arena, the Cuthbert Amphitheater, the John G. Shedd Institute for the Arts, and the Hult Center for the Performing Arts attract significant visitation tied to collegiate athletics, track and field events, concerts, and performances. These venues serve as important visitation anchors and represent opportunities to connect event attendees with additional experiences throughout the county.

The Arts and Architecture category demonstrates strong demand-driving performance relative to its size. For example, arts-related assets represent 20% of the inventory, but 73% function as demand drivers, highlighting the importance of cultural venues such as the Jordan Schnitzer Museum of Art, the Hult Center for the Performing Arts, and distinctive public art such as the Springfield Simpsons Mural in shaping the region’s cultural identity.

Several asset categories are less widely represented across the county, including wellness experiences, retail districts, and certain educational or science-based attractions. While these assets currently play a more complementary role in the visitor economy, they contribute to the diversity and balance of the overall destination offering alongside the county’s solid foundation in outdoor recreation, iconic natural landmarks, and major event venues. Over time, continued development and integration of these types of experiences could further strengthen the region’s tourism ecosystem and expand opportunities for visitors to engage with the destination in new ways. Opportunities exist in wellness and agritourism offerings that align with Lane County’s natural environment, as well as culinary experiences, including restaurants, wineries, and breweries, which stakeholders consistently identified as high-quality assets that are currently under-promoted and represent a strategic opportunity for enhanced marketing and visitor itinerary integration.



Credit: Melanie Griffin

Event Matrix

Overview

The Event Matrix process encompassed a thorough evaluation of existing leisure-facing events within each region. The assessment helps tourism stakeholders understand which events generated the most impact and more specifically, what aspects of event planning could further enhance the event. Like the Demand Driver Scorecard, JLL's Event Matrix product involves a dedicated analysis of individual events, charting their outcomes and impacts based on overall scores.

The iterative approach enables continual refinement and optimization as events are held each year. It empowers cities and event organizers to stay ahead of market trends and make strategic adjustments to optimize community investment of dollars and time, ensuring events remain competitive in the ever-changing landscape of the industry.

The Event Matrix process included:

- **Identifying Significant Events:** Collaborated with Travel Lane County to inventory regionwide event master list.
- **Utilizing Comprehensive Criteria:** Scoring each event based on 11 detailed criteria aligned with the broader tourism landscape, such as event infrastructure, planning, marketing, and potential economic impact.
- **Categorizing Events Based on Score:** Categorizing assets as attractions or attractors based on a scoring system of 0-100.
- **Scoring:** Classifying each attraction into a category based on overall points score. Categories were Community based events (0-60), regional events (60-80), national events (80-95), and global events (95-100). Scoring above 60 indicates assets or experiences as an attractor.
- **Evaluating Critical Mass:** Assessing the overall volume and significance of current events, identifying need periods, gaps, and opportunities.
- **Leveraging Outcomes:** Developing optimal calendar programming and identifying specific opportunities to enhance events.
- **Collaboration:** Working closely with the Steering Committee to review effective tactics, addressing study results, and engaging individual event organizers in the future.

This approach ensures a well-informed understanding of the event landscape and helps in positioning regions for success by focusing on high-impact events. The Event Matrix serves as a leave-behind tool that JLL encourages event planners and Travel Lane County to continue utilizing for ongoing and future event analysis to support strategic decision-making. See [Appendix](#) for further details on the Event Matrix methodology.



Credit: Courtesy of Eugene Symphony

Results

The Event Matrix process inventoried and scored 58 events across the destination that were collaboratively identified through the stakeholder engagement process and the project team. Lane County hosts a diverse array of annual events, featuring several nationally recognized anchors that define the destination’s profile.

The consistent strength of annual national draws like the Prefontaine Classic provide a firm foundation for global media exposure. While the analysis also identified a strong tier of premier events, it is important to note that the top-scoring 2024 U.S. Olympic Team Trials – Track & Field is a periodic rather than annual occurrence and is not guaranteed to occur in Eugene.

A significant finding of this study is the heavy seasonal concentration of the event calendar; 43% of all annual activity (25 events) is compressed into the summer months. While this creates a high-intensity peak season, it presents a clear opportunity to develop or shift new signature events into other seasons to achieve a more balanced year-round visitor economy. Fall remains anchored by the significant draw of University of Oregon football yet currently accounts for only 14% of the total event volume, suggesting room for complementary programming. Winter accounts for only 19% of event activity, highlighting a major opportunity to mitigate seasonal fluctuations and drive year-round visitation.

A strategic opportunity exists in the 40% of events studied (23 out of 58) that have the potential to drive demand at least at the regional level. This vital tier, including the Oregon Bach Festival, Oregon Country Fair, and the Eugene Marathon, demonstrates proven capacity to attract visitors from across the region and beyond. These events serve as both economic anchors and best practices for developing additional demand-driving programming that can extend visitor activity into shoulder and off-peak seasons.

The results of the Event Matrix indicate that focus should be placed on leveraging the success of summer drivers to seed growth in shoulder seasons, specifically scaling “Must See” events into “Regional Draws” to fill identified demand gaps, particularly the winter event shortage (only 19% of major events occur November through March) and the need for more programming during fall and spring months when hotel occupancy and visitor activity drop significantly. It is recommended to utilize the Event Matrix on an ongoing basis as an objective tool to evaluate the region’s inventory and assess the impact of current events. To support these objectives, Lane County could optimize the use of indoor venues during winter months and strategically develop the event calendar, identifying and growing high-potential events that fill demand gaps and contribute to more consistent economic activity across the year.



Credit: City of Eugene

Resident Survey

Methodology

The Travel Lane County Resident and Community Survey was fielded from October 28, 2025, through January 31, 2026.

The survey was distributed through a combination of the CINT online research panel and Travel Lane County outreach channels. The questionnaire included 18 questions focused on resident attitudes toward tourism, perceived areas for improvement, and priorities for future tourism initiatives in Lane County.

A total of 1,300 responses were collected. After data cleaning, 1,269 valid responses from individuals reporting a Lane County ZIP code as their primary residence were included in the final dataset.

The final dataset was weighted to reflect the population distribution of Lane County. Regional weighting was applied to ensure balanced geographic representation across the county, while other demographic characteristics (age, employment status, and ethnicity) closely aligned with available population benchmarks.

With a sample size of 1,269 completed surveys, the results have an estimated margin of error of ±2.7% at the 95% confidence level for the population of Lane County.



Credit: Courtesy of Teri Reifer



Credit: Melanie Griffin

Limitations of This Survey

Most responses were gathered through convenience sampling following public announcements of the community survey, which introduced the potential for self-selection bias, as individuals with stronger opinions about tourism may have been more likely to participate. To address this limitation, the research team evaluated responses against the CINT panel to ensure there were no glaring differences in response patterns or demographic composition that would significantly skew the findings.

The results should be used to understand overall resident sentiment and to highlight the most prominent themes in community perceptions of tourism across Lane County.

Due to methodological limitations, including the sampling approach, findings should be interpreted with appropriate caution and should be considered strong indicators of community sentiment rather than precise statistical representation.



Credit: Melanie Griffin

Executive Summary

Lane County’s Community Sentiment Survey indicates strong resident support for tourism and recognition of its role in community well-being. Overall, 79% of respondents rated tourism’s impact as positive or very positive, while 78% said tourism is very important to their local economy. In addition, 82% agreed that tourism contributes to national and international recognition for Lane County. This strong, positive sentiment is also reflected within each individual community. More than two-thirds of residents also believe tourism supports improved public infrastructure and expanded recreational opportunities.

Residents frequently highlighted Lane County’s natural assets, including waterfalls, rivers, parks, and scenic drives to the Oregon Coast, as key attractions they enjoy sharing with visitors. Local restaurants, markets, cultural events, and outdoor recreation were also identified as important strengths that contribute to the visitor experience. These assets form the foundation of Lane County’s tourism appeal.

At the same time, some concerns remain. About half of residents indicated that tourism contributes to challenges such as traffic congestion, litter, and the commercialization of community traditions.

Residents expressed support for tourism strategies that balance economic growth with environmental stewardship. Many respondents would like to see expanded year-round events and arts programming, as well as infrastructure and policies that help preserve community character.

More than 60% of residents identified visible homelessness, particularly in city centers, as a significant hindrance to tourism perceptions and community quality of life. Public safety concerns and the perceived deterioration of downtown areas were also cited as barriers.

These findings suggest that the destination should continue to focus on strategies that maximize tourism’s economic and environmental benefits while addressing challenges such as cost-of-living pressures, infrastructure strain, and the preservation of community character. Transparent communication and balanced tourism planning will be important to maintain resident support and address areas of concern.

Next Steps

The results of this survey provide a baseline for monitoring and evaluating the implementation of destination management strategies by Travel Lane County.

The survey should be repeated or updated ideally every two years to monitor trends in community sentiment and evaluate the impact of new policies or programs.

Travel Lane County should adopt ongoing community sentiment monitoring strategies, including:

- Maintain a consistent survey frequency and core questions to ensure comparability over time and trend analysis.
- Adding targeted modules to test strategies and programs will inform data-driven decision making.
- Incorporate additional data collection methods (e.g., focus groups, interviews, and online forums) to deepen qualitative insights.
- Expand outreach methods to ensure representative sampling across all regions and demographic groups to strengthen the validity of findings.

Key indicators should be tracked over time, including:

- Overall resident sentiment toward tourism (i.e., perceived impact of tourism on the community) and willingness to recommend Lane County as a tourist destination.
- Perceptions of public safety and downtown vibrancy.
- Concerns for housing affordability and accessibility for residents and the local workforce.
- Satisfaction with public amenities, infrastructure, and recreational opportunities.
- Community support for diverse tourism development and equitable regional benefits.

The destination should also monitor changes in perceptions of tourism’s positive impacts, particularly when these benefits are highlighted through communication and outreach campaigns.



Community Plans Review

This community plan compilation provides foundation research for the Lane County Tourism Destination Master Plan by identifying development directions and shared priorities across all 12 incorporated communities and key regional partners. This review ensures that the countywide tourism strategy aligns with local land use, economic, and infrastructure goals while highlighting opportunities for destination stewardship and economic resilience.

Methodology

The analysis synthesized 26 primary planning documents, including comprehensive plans, regional transportation plans (RTP), and comprehensive economic development strategies (CEDS). The methodology prioritized the most current adopted policies to distinguish between active policy and long-term aspirational visions. The review focused on strategic alignment, identifying where community-specific goals like downtown revitalization or recreational expansion overlap with the requirements of a robust visitor economy.



Credit: Melanie Ryan Griffin

Cross-Community Themes & Comparative Analysis

Theme	Shared Priorities	Notable Differences
Economic Growth & Competitiveness	Shifting from a passive economic trend to proactive growth by supporting target sectors like bioscience, outdoor recreation, manufacturing, and technology sector development.	The Metro area (e.g., Elevate 2028) focuses on private-sector investment and business advocacy, while rural communities (Oakridge-Westfir) rely almost exclusively on nature-based gateway tourism.
Universal Access & Infrastructure	Addressing infrastructure gaps from utility capacity constraints in industrial lands to accessibility barriers in parks, Main Streets and downtown development, and visitor services that limit the region's ability to grow and serve all visitors equitably.	Eugene and Springfield have higher readiness for infrastructure expansion, whereas communities like Creswell and Coburg are halted by limited wastewater and water system capacities.
Year-Round Asset Development	Investing in indoor, multi-use facilities (e.g., Lane Events Center) to provide a 12-month economic floor and reduce the region's reliance on the summer bell curve.	Strategic focus ranges from large-scale convention/livestock facilities in the metro core to niche, heritage-based festivals, and slow tourism in rural corridors.
Climate, Fire & Resource Stewardship	Aligning land management with fire resilience and climate-smart forestry, with coastal communities focused on estuarine and dune stability and forest-adjacent communities prioritizing wildfire protection and recreational recovery.	Coastal communities (Florence, Dunes City) focus on estuarine and dune stability, while forest-adjacent communities (Oakridge-Westfir, McKenzie) prioritize wildfire protection and recreational recovery.
Workforce & Social Foundation	Recognizing that the visitor economy cannot thrive without foundational elements like affordable workforce housing and accessible childcare for service-sector employees.	Metro plans target high-density urban corridor redevelopment, while rural plans face federal land-use restrictions and wildfire-risk boundaries that limit new housing inventory.



Synthesis of Themes, Challenges, and Opportunities

A primary theme across all 26 documents is the transition toward a managed, year-round economy that balances growth with environmental protection. Many communities are moving away from passive growth and toward active revitalization of their “Main Street” cores, using them as both cultural anchors for residents and primary attractions for visitors. This is being paired with a new model of stewardship on public lands, where federal and state plans now prioritize wildfire resilience and climate adaptation as essential components of the recreation experience. There is a clear opportunity to position the entire region as a leader in inclusive tourism by following Oregon [Department of Transportation’s ADA Transition Plan](#) for removing physical barriers in parks and downtowns, ensuring that the region’s natural and urban assets are accessible to everyone.

The most significant challenges identified are the physical and social bottlenecks that prevent new projects from moving forward. A recurring finding across the 12 communities is that even when land is available and zoned for hotels or businesses, it often lacks the necessary water, sewer, or road infrastructure to support development. This is compounded by a severe shortage of housing that is affordable for the people who work in the tourism and service industries. Additionally, federal land managers report a growing gap between record-breaking visitor numbers and the limited funding and staff available to maintain aging facilities. These issues act as a ceiling on the region’s economic potential, meaning that destination growth is currently limited more by local infrastructure and housing than by a lack of demand.

Despite these barriers, there are major opportunities for regional coordination that could transform the local economy. The planned multi-use buildings at the Lane Events Center represent a significant opportunity to attract events during the winter months, providing a stable economic floor for the entire county. A connected regional network that links individual community efforts can encourage visitors to stay longer and explore further, while supportive business and policy environments, including streamlined permitting, workforce development, and enabling tax structures, can accelerate private sector investment in destination infrastructure. The findings suggest that the most successful regional outcome will depend on the coordination of city, county, and federal strategies to resolve utility and housing constraints while simultaneously building the high-capacity, year-round facilities required to move the region past its current seasonal economic cycles.



Credit: Melanie Griffin



Pillars and Recommendations

The following seven pillars represent the strategic foundation for Lane County's next decade of destination development. Each priority emerged directly from extensive stakeholder engagement and quantitative analysis; they are practical responses to the challenges and opportunities identified across the county.

Before diving into the recommendations, it is essential to understand the one fundamental shift that underpins the success of this entire plan: moving from parallel operations to coordinated partnership.

Lane County's tourism industry currently operates as a collection of passionate, high-quality individual efforts. What is missing is not more effort; it is more connection. The recommendations that follow are designed to formalize this collaboration, creating the structures and systems that make working together the default choice rather than an occasional exception.

How to Read This Plan

The plan is organized around several key pillars, which are presented thematically and are not in order of priority. For each pillar, you will find:

Current Landscape: Context on where Lane County stands today, including both strengths to build upon and gaps to address.

Strategic Recommendations: Actionable initiatives with recommended partners, organized by the type of action required and the foundational next steps needed to begin.

Rather than organizing recommendations by general timeframes, each recommendation identifies:

Action Type – the nature of effort required:

- **Activate:** Recommendations that can move forward using existing assets, relationships, and authority. These are the immediate opportunities where coordination and collaboration can generate results without requiring new policy, major capital investment, or external partnerships.
- **Advocate:** Recommendations that require policy change, regulatory action, legislative support, or coordination with external agencies and partners.
- **Develop:** Recommendations that require significant capital investment, private sector partnerships, or multi-year development and construction timelines. These are transformational projects that will take sustained effort and collaboration across multiple partners.

Foundation Step – the specific first action required to begin implementation. This ensures every recommendation has a clear starting point, whether that is launching a pilot program, conducting a feasibility study, or convening the right partners.

This structure makes it immediately clear which recommendations are low-hanging fruit that can begin now, versus initiatives that require longer-term policy work or capital investment.

Not every recommendation will happen immediately, and not every recommendation is a single organization's sole responsibility. Some require years of partnership-building, regulatory navigation, and capital investment. Others can begin with a single convening or pilot program. What matters is forward momentum: coordinated, strategic, and grounded in the shared vision articulated by stakeholders across the county throughout this planning process.



Credit: Melanie Griffin

PILLAR 1



Close the Infrastructure Gap

Overview

Lane County has strong assets but lacks the infrastructure to fully support, connect, and retain visitors; there is no dedicated large indoor venue for year-round programming, rivers and waterfronts are under-activated, and rural recreation sites are missing basic amenities.

Current Landscape

Lane County benefits from a concentration of diverse natural landscapes, outdoor recreation opportunities, and globally recognized athletic assets that attract visitors from around the world. However, gaps remain in the infrastructure needed to support, connect, and capitalize on these assets.

Stakeholder feedback consistently identifies the shortage of mid- to large-scale meeting and event facilities as a primary constraint. The Eugene–Springfield metro area is widely perceived as underbuilt in terms of hotel meeting space and multi-use indoor venues. This limits the region’s ability to attract business travel, conventions, and multi-day group events, particularly during non-peak seasons. While there are existing meeting and event facilities in Lane County, including the Hult Center for the Performing Arts and the Lane Events Center, these venues are often unavailable or underutilized for tourism-related group business due to programming priorities focused on community events and performing arts, as well as operational challenges including pricing structures, service consistency, and booking policies that do not fully align with the needs of convention and meeting planners. There is significant opportunity to optimize the use of these existing assets through updated booking policies, enhanced coordination between venue operators and tourism stakeholders, and operational improvements that balance community programming with revenue-generating group business. This is further exposed by recent hotel supply growth, where new rooms are not fully utilized outside of major university and athletic events.

The region’s major waterways are also a significant opportunity. Stakeholders frequently note the underutilization of the Willamette River and its adjacent waterfront properties in Eugene and Glenwood. Despite being a defining natural feature, the riverfront lacks commercial activation, public access points, and community gathering spaces common in peer destinations where waterfronts function as central economic and cultural hubs. Similarly, the stakeholder and community engagement process revealed an existing perception that McKenzie River, a key recreation asset, lacks sufficient and well-coordinated public access points such as boat launches, swimming areas, and fishing sites, and the supporting amenities and commercial experiences needed to fully position it as a signature visitor asset.



Credit: Turell Group

The McKenzie River Discovery Center represents an important step in that direction. Designed to offer interpretive exhibits, educational programming, and cultural experiences rooted in the river’s ecology and heritage, the Center has the potential to become an anchor attraction that draws new visitors to the corridor and deepens the experience for those already there.

In addition to events and metro-area infrastructure, market analysis and stakeholder input reveal a critical shortage of diverse, high-quality accommodations in strategically important rural and gateway locations. This gap is particularly acute in key recreation hubs like Oakridge-Westfir and the central coast near Florence, where an insufficient supply of modern lodging limits the ability to convert day-use recreationists into overnight guests, thereby losing significant potential economic impact. Similarly, Cottage Grove, a primary access point to the southern Willamette Valley’s wine country and covered bridge scenic bikeway, lacks the lodging capacity needed to fully capitalize on its role as a tourism gateway. Finally, the absence of hotel properties immediately adjacent to the Eugene Airport (EUG) represents a major service gap for air travelers with early departures or late arrivals, and a missed opportunity to establish a convenient base for regional exploration.

In rural and recreation corridors, the infrastructure challenge is more foundational. Stakeholders describe long-standing difficulties in delivering basic amenities at recreation sites, including permanent restrooms, accessible trailheads, and clear wayfinding. In addition, several historic outdoor assets that contribute to the region’s identity, such as the county’s covered bridges and other heritage structures, require ongoing maintenance and preservation to remain safe and viable visitor attractions.

The cumulative effect is a destination with significant infrastructure deficits that limit its ability to fully capitalize on existing demand. Addressing these infrastructure gaps through a strategic, multi-source funding approach, including optimization of existing assets, is essential for building a more prosperous and resilient visitor economy.





Credit: Melanie Griffin



Recommendations

1. Premier Indoor Multi-use Sports and Event Facilities

Objective: Establish a premier indoor multi-use facility large enough to host regional sports tournaments (8-16 basketball courts) during the winter months and generate demand when leisure travel is low.

- **Strategy:** Develop a flexible, year-round indoor venue capable of hosting tournaments, trade shows, concerts, and community gatherings to strengthen Lane County’s ability to attract regional and national events. The facility must be designed for flexibility for trade shows, concerts, and community emergency sheltering.
- **Key Partners:** Lane County Government, City of Eugene, City of Springfield, Lane Transit District, Willamalane, regional sports clubs.
- **Action Type:** Develop
- **Foundation Step:** Conduct feasibility study and develop business case with projected usage, revenue models, and capital requirements. Identify potential funding sources and build public-private partnership framework.

2. Optimize Existing Event Venue Operations for Group Business

Objective: Increase utilization of existing meeting and event facilities by addressing operational barriers, booking policies, improving service delivery, and establishing coordination mechanisms that position venues as competitive, tourism-ready assets for conventions, conferences, and group business.

- **Strategy:** Convene operators of existing event venues alongside Travel Lane County and industry stakeholders to identify and address operational challenges that limit meeting and group business utilization. Focus on improving booking accessibility, pricing competitiveness, service consistency, and coordination with the broader tourism ecosystem. Establish a regular dialogue between venue operators and the tourism industry to align policies, staffing, and programming with demand periods and visitor economy goals.
- **Key Partners:** Lane County, City of Eugene, City of Springfield, Hult Center for the Performing Arts, Lane Events Center, Florence Events Center, City of Florence, University of Oregon, meeting planners, corporate event organizers.
- **Action Type:** Activate
- **Foundation Step:** Convene venue operators and tourism stakeholders to conduct an operational assessment identifying specific barriers (e.g., pricing, booking policies, service standards) and develop an action plan with measurable improvements for year-round utilization.





Credit: Michael Sherman



Recommendations

3. Targeted Lodging Development in Rural Areas

Objective: Increase the supply of diverse, high-quality accommodations in geographically strategic zones to support underserved visitor markets, reduce infrastructure strain, and increase economic impact.

- **Strategy:** Work with developers and local stakeholders to create a targeted incentive package and investment prospectus that attracts a range of accommodation types—including cabins, lodges, campgrounds, and other context-appropriate lodging—in areas of critical need. This recommendation is specifically aligned with Chapter 9 of the Florence Realization 2020 Comprehensive Plan, reinforcing local policies that support anchor tourism destinations, Old Town revitalization, and the expansion of visitor-serving recreational infrastructure within the Florence target area. This approach will be applied to other key locations, including the Eugene Airport area, Oakridge-Westfir, and Cottage Grove, to better align with visitor preferences and support longer stays across the region.
- **Key Partners:** Lane County Economic Development, municipalities, private hotel developers, and hospitality investment groups.
- **Action Type:** Develop
- **Foundation Step:** Complete market analysis and site feasibility studies for priority locations. Develop incentive framework and investment prospectus for developer recruitment.

4. Glenwood and Eugene Waterfront Development

Objective: Transform the underutilized Glenwood and Eugene riverfronts into a vibrant, mixed-use destination hub that provides new lodging, dining, retail, and recreational amenities for both residents and visitors.

- **Strategy:** Implement the Glenwood and Eugene waterfront visions as a mixed-use district that prioritizes public river access, pedestrian connectivity, recreation, and destination-oriented development. This initiative directly aligns with the Glenwood Refinement Plan and Springfield Development Code Section 3.4-200 (Glenwood Riverfront Mixed-Use Plan District), supporting the city’s vision of transitioning the riverfront into a multi-modal, pedestrian-oriented district that explicitly permits and prioritizes hospitality development.
- **Key Partners:** Springfield Economic Development Agency (SEDA), Eugene Business & Economic Development Department, City of Springfield, City of Eugene, Lane County, Willamalane, Onward Eugene, economic development groups, private master developers, University of Oregon, and community organizations.
- **Action Type:** Advocate
- **Foundation Step:** Provide tourism industry data and economic impact projections to support infrastructure funding applications. Participate in public planning processes to ensure visitor economy needs are represented.



Credit: Melanie Griffin



Recommendations

5. Willamette and McKenzie Rivers Activation

Objective: Improve public infrastructure and amenities, and create new, sustainable recreational and commercial opportunities on the underutilized Willamette and McKenzie Rivers, repositioning them as central assets of the regional visitor experience.

- **Strategy:** Identify gaps in river access and amenities, then stimulate and support coordinated river-based recreation and commercial experiences that position the region’s rivers as signature visitor assets.
- **Key Partners:** Willamette Riverkeeper, McKenzie Trail Volunteers, McKenzie River Trust, McKenzie River Discovery Center, River House Outdoor Center, Eugene Parks Foundation, Lane County Parks, Army Corps of Engineers, Oregon Marine Board, local municipalities, and private outfitter/guide businesses.
- **Action Type:** Activate
- **Foundation Step:** Convene stakeholders to inventory existing river infrastructure, identify gaps and priority improvement locations (including stalled projects like Forest Glen boat landing), and develop a phased implementation plan for enhancements ranging from signage and wayfinding to capital projects, with identified funding sources and responsible parties.

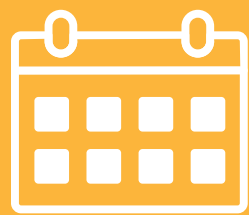
6. Rural Trailhead Amenity Standards

Objective: Address long-standing infrastructure gaps at priority recreation sites by establishing permanent, accessible visitor amenities, particularly restroom facilities, parking, and wayfinding signage, along the McKenzie River, Oakridge-Westfir, and Coastal corridors, in response to community and business operator requests for foundational improvements that support both visitor experience and local economic viability.

- **Strategy:** Develop and advocate for a shared regional standard for trailhead infrastructure, ensuring that major outdoor recreation access points provide reliable amenities such as permanent restrooms, potable water access, and ADA-compliant pathways.
- **Key Partners:** Lane County Parks, Willamette National Forest, Siuslaw National Forest, Umpqua National Forest, Travel Oregon, trail volunteer groups.
- **Action Type:** Activate
- **Foundation Step:** Inventory existing trailhead conditions across priority corridors. Establish shared amenity standards through collaborative working group with public land managers and advocate for implementation through federal capital improvement funding.



PILLAR 2



Build a Year-Round, County-Wide Visitor Economy

Overview

Visitation and revenue follow a strong summer bell curve and drop sharply in winter, creating an unstable economic foundation for businesses and communities across the county that depends on more consistent year-round demand. Large events are one of the region’s most powerful tools for countering that pattern, yet visitor spending from those events tends to stay concentrated in the metro area rather than flowing to communities across the county.

Current Landscape

Lane County’s visitor economy is defined by pronounced seasonal volatility. For FY2024, average hotel occupancy was 53%, with rates ranging from a winter low of 36% to a peak of 78% in June, reflecting significant fluctuation throughout the year. Stakeholders highlight that this volatility leads to workforce and revenue instability, making it difficult for local businesses to maintain consistent operations during the off-season. This pattern is reinforced by event demand. Event Matrix analysis shows that 43% of major events are concentrated in the three summer months, while winter accounts for less than 20 percent.

Achieving long-term resilience requires a strategic shift toward a year-round model. The recommendations detailed below support this objective by focusing on the clear packaging of winter assets to attract the “responsible outdoor recreationalist,” a high-spending visitor segment identified as a priority by the project Steering Committee for the off-season. Currently, however, these diverse assets are not fully packaged or activated in a way that drives consistent, year-round visitation.

The results of the Event Matrix reinforce the need for event diversification. Successes with niche programming like Winter Whale Watch Weeks, which have the potential to drive tens of thousands of coastal visitors in the off-season, demonstrate that well-positioned cultural and coastal events can generate meaningful demand independent of peak-season dynamics. Given that nearly 10% of regional cultural event attendees are non-local visitors spending an average of \$77.55 extra per day in the community, expanding these independent demand drivers is essential to reducing the region’s reliance on weather-dependent activities.



Credit: Gritchelle Fallesgo

Stakeholders frequently highlight the distinctiveness of the region’s arts, culture, and culinary sectors as high-value assets. However, local businesses report a perception that visitors attending major sporting events are often unaware of these nearby offerings. Stakeholders noted that these event patterns often result in shorter day trips, representing a strategic opportunity to transform captive attendees into overnight regional explorers. Providing clear suggestions for nearby activities removes the effort of planning and makes staying longer the simplest choice. Embedding destination experiences into event communications and utilizing interception strategies can help extending stays and increasing local spending.

Demand Driver Scorecard analysis and stakeholder input indicate that while the Willamette and McKenzie rivers drive significant visitation during the summer, they remain severely underutilized assets for year-round commerce. These major river systems represent a unique opportunity for high-impact, all-season activation. The Glenwood Riverfront redevelopment in Springfield serves as a prime model for mitigating this seasonal drop-off. By transitioning an underutilized waterfront into a dense, mixed-use district anchored by hospitality, dining, and proposed weather-independent assets, the redevelopment effectively shifts the river from a fair-weather recreation site to a 12-month economic hub. Pairing natural assets with climate-resilient, indoor-outdoor infrastructure is essential for sustaining year-round visitor demand.

To address these challenges, this strategy focuses on two distinct visitor groups: curated experiences to increase engagement for ‘responsible outdoor recreationalist,’ and proactive conversion tactics to turn ‘event-driven visitors’ into overnight guests. This dual-pronged approach ensures Lane County optimizes its diverse assets to build a more resilient and balanced visitor economy.



Credit: Melanie Ryan Griffin



Recommendations

1. Large Events for Maximizing Visitor Dispersion

Objective: Transform major event attendance into a catalyst for visitation by converting attendees into regional explorers, addressing the “drive-in, drive-out” patterns and lack of overnight stays identified by stakeholders.

- **Strategy:** Expand partnerships with organizers of large-scale events, including conferences, tournaments, festivals, and performances, to encourage visitors to extend their stays through curated experiences that connect event attendance with the broader region. This approach recognizes that visitors may not have initially come for leisure but represents a high-value opportunity to showcase regional assets to audiences already present in the destination.
- **Key Partners:** Event organizers (conferences, tournaments, festivals, performing arts venues), Travel Lane County, local hotel operators, chambers of commerce, regional attraction operators.
- **Action Type:** Activate
- **Foundation Step:** Develop replicable “extend your stay” toolkit with regional itineraries, digital assets, and partner offers. Pilot with 3-5 major events across different seasons.

2. Signature Winter Events & Programming

Objective: Correct the seasonal imbalance where winter accounts for less than 20 percent of major events by developing recurring cultural, culinary, and wine-focused indoor programming to increase winter visitation.

- **Strategy:** Build a stronger portfolio of events between November and March to attract visitors during the shoulder season, appealing to high-value regional markets that seek high-quality winter experiences.
- **Key Partners:** Local event organizers, performing arts venues, regional arts councils, wineries, breweries, restaurants, agritourism operators, Travel Lane County, and chambers of commerce.
- **Action Type:** Activate
- **Foundation Step:** Use Event Matrix to identify existing winter events with regional potential. Provide enhanced marketing support and develop event organizer capacity-building programs focused on scaling. Encourage further partnerships between wineries, lodging providers, and transportation services to create bundled winter experiences.



Recommendations

3. Seasonal Packaging and Event Alignment

Objective: Reduce seasonal economic volatility and stabilize the tourism and hospitality workforce by strategically distributing events across the calendar and promoting year-round visitor experiences.

- **Strategy:** Create a collaborative framework with industry partners to inventory seasonal assets, co-create marketable experience packages, and incentivize event organizers to schedule programming during the winter and shoulder seasons. Best practices can include conducting a comprehensive seasonal asset inventory of regional attractions and activities, launching collaborative programs with local businesses to develop and market themed packages, and providing enhanced marketing support, venue assistance, or financial incentives for major events scheduled between November and March. Position wine and culinary tourism as reliable year-round demand drivers, particularly through winter wine weekends, seasonal tasting experiences, and food-focused events.
- **Key Partners:** Travel Lane County, event organizers, lodging and attraction partners, local chambers of commerce, outdoor recreation outfitters, wineries and agritourism operators, and cultural organizations.
- **Action Type:** Activate
- **Foundation Step:** Conduct comprehensive seasonal asset inventory across all communities. Launch collaborative packaging workshops with industry partners to develop themed winter/shoulder-season experiences.



Credit: City of Eugene Cultural Services



Credit: EugeneCascadesCoast.org

PILLAR 3



Invest in Tourism that Supports Resident Quality of Life

Overview

Residents broadly support tourism and want to see it deliver tangible community benefits: jobs, business growth, infrastructure investment, local economic opportunities, natural area stewardship, and workforce housing. However, this support depends on transparency, equitable distribution of benefits across all 12 communities, and a genuine commitment to centering resident quality of life alongside visitor experience.

Current Landscape

Community wellbeing in Lane County is shaped by how residents experience tourism alongside broader challenges related to housing affordability, workforce stability, infrastructure, and downtown livability.

The Resident Sentiment Survey shows strong support for tourism, with approximately 79% of residents viewing tourism positively and 78% identifying it as important to the local economy. Residents also recognize meaningful benefits from tourism, including improved recreation opportunities (~81%), improved parks and natural areas (~67%), and improvements to public infrastructure (~66%). Survey responses also identified social and cultural benefits, including expanded dining and entertainment options and greater exposure to different cultures and visitors from outside the region.

At the same time, support for tourism is conditional. Residents associate tourism with traffic congestion (~55%), commercialization of local culture (~54%), and increased cost of living (~33%), indicating that tourism benefits are not always experienced evenly across communities.

Stakeholder interviews further highlighted concerns about housing affordability, workforce shortages, and labor instability affecting both resident wellbeing and the tourism industry. Stakeholders consistently identified the lack of affordable workforce housing as a barrier to recruitment, retention, and long-term service quality across the county.

In Downtown Eugene, stakeholders described limited evening activity, early business closures, and concerns related to perceptions of safety and downtown vibrancy, all of which affect both resident and visitor experience. Rural communities face additional challenges including seasonal instability, transportation limitations, and infrastructure gaps.

Stakeholders also emphasized the need for more transparent communication about tourism impacts and benefits, as well as more reinvestment into community priorities such as infrastructure, recreation access, downtown vitality, and cultural programming. Overall, both residents and stakeholders recognize tourism’s value, but also identify housing, workforce, livability, and infrastructure challenges as limiting how consistently those benefits are experienced across Lane County.





Credit: Todd Cooper



Recommendations

1. Ongoing Resident Engagement and Impact Monitoring

Objective: Make tourism’s community benefits visible, measurable, and directly responsive to resident priorities.

- **Strategy:** Establish a structured and continuous system for monitoring, communicating, and responding to resident sentiment, ensuring tourism’s impacts and benefits are both measured and visibly reflected in decision-making. Best practices can include launching a biannual resident sentiment survey to track perceptions of tourism’s impact on quality of life, infrastructure, housing, and community character over time; establishing regular community forums in diverse geographic locations across Lane County to facilitate direct dialogue and gather qualitative feedback; and integrating feedback into planning processes.
- **Key Partners:** Travel Lane County, Lane County, local municipalities, chambers of commerce, neighborhood associations, and community advisory groups.
- **Action Type:** Activate
- **Foundation Step:** Establish biannual resident sentiment survey schedule and baseline metrics. Launch quarterly community forum series in geographically diverse locations.

2. Downtown Eugene’s Safety and Vibrancy

Objective: Improve Downtown Eugene’s conditions and evening vibrancy to improve perceptions of safety, increase activity, and create a more welcoming experience for residents and visitors.

- **Strategy:** Position Downtown Eugene’s safety and vibrancy as a critical economic priority by aligning tourism data, business performance insights, and public sector investment to address both real and perceived barriers to visitation. This strategy directly integrates with the Eugene Chamber’s Elevate 2028 initiative and supports the City of Eugene’s 2026 Technical Advisory Group (TAG) recommendations. Aligning destination safety and vibrancy efforts with the city’s newly expanded economic development staff ensures a coordinated approach to improving city center safety and generating long-term tax revenues. Best practices include advocating for tourism industry representation on relevant city-led task forces and committees, using tourism and economic data to quantify the impact of safety and perception issues on visitation and business performance, and supporting activation strategies that increase vibrancy and shift perceptions among both residents and visitors.
- **Key Partners:** City of Eugene, Eugene Police Department, Downtown Eugene Inc., Eugene Area Chamber of Commerce, Arts and Business Alliance of Eugene, local business and property owners, public safety agencies, cultural organizations, event organizers.
- **Action Type:** Advocate
- **Foundation Step:** Quantify tourism and economic impact of safety perception issues using visitor data through online visitor sentiment analysis from reviews and social media, and business performance metrics such as commercial vacancy rates. Secure seats on city-led task forces to provide industry perspective. Join in efforts that drive residents and visitors to downtown Eugene.





Credit: City of Eugene



Recommendations

3. Hospitality Workforce Support

Objective: Strengthen the long-term workforce pipeline for Lane County’s hospitality sector by serving as an active industry partner in the development and promotion of comprehensive hospitality education programs that introduce young people to tourism careers and provide pathways from secondary education through professional certification.

- **Strategy:** Develop a strong education-to-employment pipeline by connecting local schools, community colleges, and industry partners to prepare and retain talent for the region’s visitor economy, acknowledging and addressing the unique challenges facing rural employers, including housing availability, childcare, transportation, and seasonal employment fluctuations.
- **Key Partners:** Connected Lane County, Lane Community College, school districts, chambers of commerce, regional hotel and restaurant associations.
- **Action Type:** Develop
- **Foundation Step:** Advocate for hospitality in workforce sector programs. Support hospitality industry, education, and workforce development partners in identifying gaps and connecting to programs.

4. Tourism Investment that Delivers Measurable Community Benefit

Objective: Facilitate informed conversations about the strategic investment of TLT revenues by providing data, analysis, and industry perspectives to decision-makers.

- **Strategy:** Equip local governments and economic development partners with the data and economic rationale needed to make informed decisions about TLT allocation priorities that support both visitor demand and community infrastructure needs. Such information can include visitor economic impact data, infrastructure gap assessments, case studies from other destinations, and how specific TLT-funded projects might impact local tax revenue, visitor demand, length of stay, or destination competitiveness.
- **Key Partners:** Travel Lane County, Lane County Board of Commissioners, Lane County staff, city governments, Lane County Economic Development, economic development organizations, Travel Oregon, Oregon Restaurant & Lodging Association, Willamalane.
- **Action Type:** Advocate
- **Foundation Step:** Develop standardized economic impact framework and infrastructure gap assessment methodology, as well as information for a public-facing annual impact report detailing tax revenue generated and community projects supported.



PILLAR 4



Improve Transportation Around the Region

Overview

Visitors cannot easily move between Lane County's three distinct regions without a car, and there is no reliable transportation connecting the airport to visitor hubs or the metro area to rural outdoor recreation.

Current Landscape

The operational landscape for transportation in Lane County is characterized by a disconnect between recent, resident-focused mobility improvements and the persistent needs of the visitor economy. While Lane Transit District's Rural Shuttle Pilot, a two-year downtown transit pilot, and a planned micromobility program for people with disabilities represent meaningful progress for local access, these services remain largely disconnected from visitor logistics, event travel, and tourism circulation patterns. This creates a significant barrier to cohesive destination development and visitor dispersion.

This transportation gap is most acute for arriving visitors. Eugene Airport (EUG), the region's primary air gateway, has no coordinated shuttle system connecting visitors to metro hotels, event venues, or outlying destinations. Stakeholders consistently describe this as a primary inhibitor of growth, especially for international and high-value domestic visitors who are unwilling or unable to navigate a car-dependent destination.

Specific infrastructure deficiencies, including challenges such as a lack of continuous connection between trails, also directly impact visitor safety and experience. The Oregon Coast Trail exemplifies this, with approximately ten percent of its length consisting of discontinuous segments that force hikers onto the shoulder of U.S. 101.

Finally, within the metro area, growing traffic congestion during major events is a concern. The region continues to rely heavily on general-purpose public transit with limited weekend or evening hours, which is often misaligned with visitor travel patterns. The absence of specialized connections between high-demand nodes, such as the airport, downtown, and Hayward Field, limits both visitor mobility and the region's ability to distribute economic benefits more evenly.



Credit: SpringFed Media



Recommendations

1. Accessible Car-Free Mobility Options

Objective: Establish reliable, accessible transportation options that reduce visitor reliance on personal vehicles, improve mobility for visitors with disabilities, and connect metro areas with key tourism clusters across Lane County.

- **Strategy:** Establish public-private partnerships to launch and expand transit solutions connecting the metro area with key visitor destinations across Lane County. Prioritize investments that connect population centers with high-performing, tourism-dependent economies like the Florence area, ensuring resources are directed where they can generate the greatest return for residents and the broader county economy. This includes:
 - › **Regional tourism shuttle services:** Launch reliable shuttle links connecting the Eugene Airport and the metro area with primary tourism hubs along the Oregon Coast, Oakridge-Westfir, and the McKenzie River Valley, with the Eugene-Florence corridor as a key initial priority.
 - › **Expanded rural transit solutions:** Provide data and strategic input to support transit authorities in exploring flexible, demand-responsive transit models that connect rural communities and recreational assets.
 - › **Enhanced public transit service hours:** Advocate for expanded weekend and evening public transit service to better align with visitor travel patterns and hospitality industry operating hours, particularly along corridors connecting lodging, dining, and attraction clusters.
 - › **Demand-responsive visitor transit options:** Explore pilot programs that enhance on-demand transit access for visitors traveling along high-priority corridors or during major events, with particular emphasis on ensuring wheelchair-accessible options are included in service design.

- **Key Partners:** Travel Lane County, Lane County, Lane Transit District, Lane Council of Governments, local municipalities, chambers of commerce, neighborhood associations, and community advisory groups.
- **Action Type:** Develop
Foundation Step: Conduct transit need and feasibility study identifying high-demand routes, service windows, and accessible service requirements. Explore connectivity subsidy funds and public-private partnership models.

2. Oregon Coast Trail Completion

Objective: Elevate the Lane County segment of the Oregon Coast Trail into a premier, multi-day hiking destination by completing critical infrastructure gaps, enhancing regional connectivity, and developing a supportive ecosystem of visitor services that drives overnight stays in Florence and other coastal communities.

- **Strategy:** Advance the completion and enhancement of the Oregon Coast Trail as a signature tourism asset. Advocate to secure funding for trail completion and safety improvements while simultaneously developing visitor services (e.g., hiker shuttles, luggage transport, lodging packages) that connect trail users to coastal communities, driving regional economic impact.
- **Key Partners:** Oregon Parks and Recreation Department, Oregon Department of Transportation, City of Florence, Florence Area Chamber of Commerce, local lodging and transportation providers.
- **Action Type:** Advocate
- **Foundation Step:** Partner with state agencies and Florence Chamber to document hazardous segments and develop interim safety solutions. Begin identifying visitor service opportunities that connect trail users to coastal communities and position Florence as a midway stop along the trail.





Credit: Melanie Griffin



Recommendations

3. Cycling and Micromobility Integration

- **Objective:** Expand low-carbon, active transportation options that enhance visitor mobility, reduce vehicle congestion, and align with the destination’s sustainability and accessibility goals.
- **Strategy:** Expand and promote cycling infrastructure, bike-share programs, and electric micromobility options as viable visitor transportation modes, particularly for short-distance trips within urban cores and between closely clustered attractions. Examples include partnering with bike-share operators to expand service areas to high-visitor zones, advocating for secure bike parking and charging infrastructure at major attraction sites, and developing visitor-facing cycling itineraries that connect lodging, dining, and attractions via existing bike lanes and multi-use paths.
- **Key Partners:** Bike operators and shops, City of Eugene Public Works, ODOT Active Transportation Division, Willamalane Park and Recreation District, tour operators, environmental advocacy organizations.
- **Action Type:** Activate
- **Foundation Step:** Map existing bike infrastructure against visitor demand patterns. Partner with bike-share operators to expand service to hotel clusters and major attractions. Develop visitor-facing cycling itineraries.

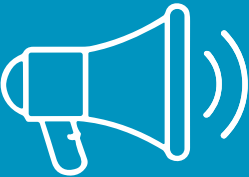
4. Eugene Airport Expansion Partnership

- **Objective:** Advocate for the infrastructure and capacity expansions needed to support the continued growth of the Eugene Airport, ensuring the region’s primary air gateway can attract new air service and accommodate future visitor demand.
- **Strategy:** Foster active coordination between the airport, the tourism industry, and regional partners to realize the airport’s growth potential, ensuring visitor economy data and connectivity needs are represented in master planning decisions, grant applications, and air service recruitment efforts.
- **Key Partners:** Eugene Airport, city and regional economic development organizations, regional and statewide destination marketing and management organizations, Travel Lane County..
- **Action Type:** Advocate
- **Foundation Step:** Provide visitor data and economic forecasts to support air service development and grant applications.



Credit: Joey Hamilton

PILLAR 5



Champion Strong Regional Branding and Marketing

Overview

The Eugene, Cascades & Coast brand gives visitors a sense of the geography of the destination but does not give them a compelling reason to choose Lane County or an architecture for individual community brands under the regional brand.

Current Landscape

Lane County’s regional brand positions the destination as Eugene, Cascades & Coast. While this identity effectively describes the geographic diversity of the region, stakeholder feedback represents a desire to shift the brand into a clear, experience-led identity. The existing Brand Style Guide provides storytelling guidance, but it is difficult for individual communities to express their unique local identities while remaining connected to a unified regional narrative.

Partners expressed a desire to evolve the regional brand beyond geographic diversity toward a stronger emotional identity centered on how Lane County makes visitors feel, with themes such as connection, inclusivity, creativity, stewardship, and exploration emerging consistently throughout stakeholder discussions. Interviews also highlighted opportunities to strengthen Lane County’s positioning as a leader in inclusive and accessible outdoor recreation.

Underlying this brand challenge is a broader fragmentation across the destination ecosystem, with limited coordination between partners making cohesive regional marketing and multi-community experiences difficult to achieve.

Finally, stakeholders identified a significant opportunity to better connect communities across Lane County through curated thematic itineraries and coordinated visitor experiences that encourage visitor dispersion, extend length of stay, support shoulder-season visitation, and increase the visibility of smaller communities and local tourism businesses.





Credit: Turell Group



Recommendations

1. Community and Regional Brand Alignment

Objective: Create a cohesive regional identity that allows communities across Lane County to express their unique character while contributing to a unified destination narrative.

- **Strategy:** Collaborate with community partners to explore how individual communities within Lane County can develop or strengthen their unique identities Represented in the regional brand.
- **Key Partners:** Travel Lane County, chambers of commerce, municipalities, tourism businesses, community organizations.
- **Action Type:** Activate
- **Foundation Step:** Conduct brand workshops with community representatives to explore nested brand models. Develop flexible brand framework that accommodates local identity expression.

2. Leadership in Inclusive, Accessible, and Responsible Outdoor Exploration

Objective: Position Lane County as a leading destination for inclusive, accessible, and responsible outdoor recreation experiences.

- **Strategy:** Build on the county’s strong outdoor recreation assets by integrating accessibility, stewardship, and inclusivity into destination marketing, visitor information, and experience development efforts. This includes highlighting accessible recreation opportunities, improving representation across destination marketing materials, promoting responsible recreation education, and connecting year-round outdoor experiences across communities.
- **Key Partners:** Mobility International USA (MIUSA), Latino Network Oregon, Boys & Girls Clubs, Confederated Tribes of Coos, Lower Umpqua and Siuslaw Indians, Confederated Tribes of Siletz, Confederated Tribes of Grande Ronde, Outdoor Industry Association, Environmental NGOs, Travel Oregon, outdoor recreation organizations, public lands management agencies, municipalities, tourism businesses.
- **Action Type:** Activate
- **Foundation Step:** Inventory accessible recreation assets and establish partnerships with inclusion-focused organizations. Launch accessible recreation marketing initiative highlighting existing accessible experiences.



Credit: City of Eugene Cultural Services



Recommendations

3. Destination Marketing Amplification through Collaboration

Objective: Increase the visibility and marketing reach of tourism businesses and communities through stronger collaboration, coordinated messaging, and shared marketing capacity-building efforts.

- **Strategy:** Create a more connected regional marketing ecosystem that supports tourism partners through regular communication, collaborative promotion, shared storytelling, and ongoing education around visitor behavior, digital marketing tools, audience engagement, and industry trends. This includes regular marketing roundtables, partner collaboration opportunities, and ongoing education related to digital marketing tools and evolving consumer behavior. The effort should prioritize collective regional visibility and coordinated destination messaging while expanding opportunities for smaller businesses and communities to participate in collaborative marketing initiatives and shared campaigns.
- **Key Partners:** Travel Lane County, chambers of commerce, tourism businesses, municipalities, marketing professionals.
- **Action Type:** Activate
- **Foundation Step:** Launch marketing roundtable series. Develop co-op marketing program that allows smaller businesses and communities to participate in regional campaigns.

4. Audience Segmentation and Validation

Objective: Ensure destination marketing, product development, and tourism investment decisions are informed by validated visitor insights and evolving travel motivations.

- **Strategy:** Develop a shared understanding of Lane County’s priority visitor audiences and travel behaviors through ongoing market research, audience segmentation, and visitor trend analysis. Findings should inform destination marketing campaigns, thematic product development, shoulder-season activation efforts, and long-term tourism planning across communities throughout the county.
- **Key Partners:** Travel Lane County, chambers of commerce, tourism partners, economic development organizations.
- **Action Type:** Activate
- **Foundation Step:** Conduct comprehensive visitor segmentation research. Further enhance audience personas with behavioral insights, trip planning patterns, and spending characteristics.



Credit: Colin Morton



Recommendations

5. Integrated visitor dispersion

Objective: Encourage visitors to explore more communities across Lane County, extend their length of stay, and increase tourism benefits throughout the region.

- **Strategy:** Create and promote curated thematic itineraries and connected visitor experiences that link communities, recreation assets, arts and culture, culinary experiences, events, and outdoor destinations across the county. These itineraries must be embedded directly into the platforms and moments visitors are already using, from event communications and booking confirmations to digital wayfinding and arrival experiences. This includes better connecting the destination’s sports and event economy with complementary experiences in surrounding communities to support shoulder-season visitation, increase overnight stays, and strengthen regional tourism connectivity.
- **Key Partners:** Arts and culture organizations, South Willamette Wineries Association, local historical societies, municipalities, University of Oregon, and individual businesses.
- **Action Type:** Activate
- **Foundation Step:** Develop themed itineraries spanning coast, valley, and mountains. Integrate into digital platforms with partner booking links.

6. Brand Evolution from Geographic Diversity to Emotional Connection

Objective: Strengthen Lane County’s competitive positioning by evolving the destination brand from primarily describing geography to communicating the emotional experience of visiting the region.

- **Strategy:** Build a more emotionally resonant destination identity centered on themes consistently identified during stakeholder engagement, including connection, creativity, inclusivity, authenticity, stewardship, and exploration. This includes refreshing destination messaging and storytelling across marketing channels to emphasize meaningful visitor experiences tied to outdoor recreation, arts and culture, sports, culinary experiences, and community connections.
- **Key Partners:** Travel Lane County, economic development organizations, tourism businesses, community partners.
- **Action Type:** Activate
- **Foundation Step:** Conduct brand messaging research and testing. Develop refreshed messaging framework centered on emotional connection and visitor experience themes.



Credit: Melanie Griffin

PILLAR 6



Convert University of Oregon Visitors into Lane County Visitors

Overview

The University of Oregon (UO) and its venues are the number one Demand Driver to the county. Many UO visitors currently stay within the university or event footprint during their visit. There is a key opportunity for collaboration with tourism industry partners to extend overnight stays and visitor spending throughout the county.

Current Landscape

The University of Oregon is the most influential force shaping the tourism landscape. As the number one demand driver in the county, university-affiliated events drive peak demand, with June consistently emerging as the strongest month for short-term rentals due to the convergence of graduation and NCAA Track & Field championships. However, the scale of this demand is not fully translating into broader economic distribution across the destination.

Stakeholder engagement and industry interviews highlight a significant disconnect between UO-centric visitation and regional economic spillovers. While hoteliers cite major university events as a primary driver of lodging compression, retail and culinary operators express frustration that visitors, whether they are athletes, attendees, prospective students, or visiting families, often remain confined to the immediate vicinity of the campus. Tourism stakeholders perceive that these groups engage minimally with surrounding commercial districts, creating a gap between high event attendance and lower-than-expected retail and dining patronage beyond the campus footprint. University partners note this perception may stem from exceptional cases where limited hotel availability required on-campus housing, suggesting a need for post-event data to align visitor expectations with on-the-ground reality.

This indicates a structural flaw in the current visitor journey. The university successfully attracts visitors for a specific purpose, but the journey often ends there. This “drive-in, drive-out” pattern for events, combined with the fact that many university-related visitors limit their activities to the venue, means local businesses feel invisible. Furthermore, there is reporting that major university events trigger rate compression, which can price out non-university leisure travelers, creating an unbalanced market.

This highlights a strategic opportunity to evolve the university partnership from a passive driver of visitation into an active and integrated platform for regional economic development. Realizing this potential hinges on intentional collaboration between the University of Oregon and regional tourism partners. By working together to create intentional bridges between the campus experience and the surrounding communities, the destination can convert single-purpose UO visitors into multi-day Lane County explorers and encourage the longer stays required for a balanced year-round economy.





Recommendations

1. University of Oregon-Tourism Coordination

Objective: Synchronize institutional planning with regional economic development to address the concern that local businesses feel invisible to campus visitors.

- **Strategy:** Establish ongoing collaboration channels between the University of Oregon, local government, and hospitality partners to align event planning, visitor messaging, and regional tourism opportunities.
- **Key Partners:** University of Oregon, Travel Lane County, South Willamette Valley Innovation Corridor, Onward Eugene, peer academic institutions, chambers of commerce.
- **Action Type:** Activate
Foundation Step: Establish coordination meetings. Create shared event calendar and visitor communication protocols, including a framework for providing destination information and packages to visiting schools and peer institutions.

2. Maximization of Economic Impact from Events and University Venues

Objective: Increase visitor spending, overnight stays, and regional dispersal from major sporting events by transforming single-purpose event attendees into multi-day destination visitors who explore Lane County’s broader attractions, dining, and lodging offerings beyond the event footprint.

- **Strategy:** Establish a proactive and formal partnership with organizers of marquee university and athletic events to integrate destination management objectives directly into their event planning and execution. This collaborative approach would focus on best practices such as embedding regional itineraries and “extend your stay” packages into event communications, developing strategies to prioritize local hotel inventory over dormitory accommodations, and conducting shared post-event research to understand visitor spending and identify barriers to regional exploration.
- **Key Partners:** University of Oregon, University of Oregon Athletics, major event organizers, hotels, Travel Lane County.
- **Action Type:** Activate
- **Foundation Step:** Develop “extend your stay” integration toolkit for event organizers. Pilot with 2-3 major UO events and track conversion metrics through post-event visitor surveys.



Credit: Melanie Griffin

Credit: Melanie Griffin

3. Regional Tourism Integration into the UO Student and Alumni Lifecycle

Objective: Partner with University of Oregon (UO) to create visitor packages for non-athletic high-traffic periods, such as move-in/move-out days, graduation, and Big Ten football weekends.

- **Strategy:** Leverage key academic calendar periods, such as move-in week, commencement, and major campus events, as opportunities to introduce visiting families to the wider destination through curated regional experiences and packages that encourage overnight stays, for example, by integrating regional tourism assets and Travel Lane County into emerging initiatives.
- **Key Partners:** University of Oregon, UO Alumni Association, the UO Division of Student Life, Travel Lane County, hotels, tourism businesses.
- **Action Type:** Develop
- **Foundation Step:** Map UO academic calendar high-traffic periods. Develop partnership framework with University of Oregon and Alumni Association. Create pilot packages for one academic cycle.



Credit: Eugene, Cascades & Coast



PILLAR 7

Connect the Industry

Overview

Coordination between businesses, event organizers, and public lands managers across Lane County’s tourism industry is inconsistent, creating opportunities to strengthen alignment around visitor marketing, communications, and shared understanding of the visitor economy.

Current Landscape

Lane County’s tourism industry comprises a diverse network of stakeholders working toward shared goals, supported by Travel Lane County’s established role as the primary destination marketing and management expert for the region. Travel Lane County has built a strong foundation of industry coordination through regular networking events, business support programs, workforce support, and seasonal marketing campaigns. The organization is consistently recognized by stakeholders as essential to the region’s competitive positioning and serves as the central convener for tourism-related collaboration across the county. Stakeholders widely referenced these programs as valuable support mechanisms for the tourism industry.

As the region continues to evolve, stakeholders have expressed interest in greater clarity around what the industry is collectively working toward and how collaboration can best support those goals. While current networking events are valued, business owners have indicated a desire for more sector-specific, outcome-oriented forums that focus on joint problem-solving and coordinated action. Stakeholders expressed interest in clearer shared priorities, defined roles, and stronger connections between collaboration efforts and measurable outcomes.



Current Landscape

Several opportunity areas highlight where more structured coordination could further strengthen the destination:

Front-line hospitality staff represent a significant opportunity for deeper regional integration. Several stakeholders noted that front-line staff often want to recommend experiences across the region but do not always have knowledge of offerings beyond their immediate area. Destination-wide training initiatives would equip all front-line workers with consistent knowledge of regional attractions, dining, recreation, and cultural experiences, positioning them as more effective ambassadors across Lane County’s diverse communities.

Major sporting and cultural events generate substantial visitation, yet stakeholders note that this activity does not always translate into broader economic engagement across the local community. Some stakeholders described situations where visitors remain concentrated within event venues while nearby businesses experience limited spillover activity. Event organizers and local businesses sometimes operate on parallel tracks, with limited formal mechanisms to connect event attendees with the full range of dining, retail, and attraction options available throughout the region. Stakeholders have suggested more structured partnerships between Travel Lane County, event organizers, and local businesses to ensure visitors are aware of and encouraged to explore beyond event venues.

Coordination with public asset managers also emerged as an area where stronger alignment could support the destination. Some managers of highly visited natural and recreational sites indicated limited regular touchpoints with visitor industry trends, creating missed opportunities to align capital investment, maintenance priorities, and visitor management strategies with observed demand patterns. Stakeholders noted that more systematic coordination, including focused task forces, could help ensure that infrastructure investments and preservation efforts are informed by visitation data and tourism trends.

Data access emerged as a priority across multiple stakeholder groups. Stakeholders expressed strong interest in more accessible, localized data on tourism performance, economic impacts, and visitor behaviors. Public asset managers noted that improved access to data would support more informed resource allocation decisions. Businesses and community stakeholders emphasized that clear, regularly updated metrics would help strengthen understanding of tourism’s economic and community impacts while supporting investment and decision-making across the destination.

The relationship between tourism and community sentiment also presents an opportunity for more structured engagement. While resident sentiment surveys have generated substantial participation and valuable insights, stakeholders suggested that ongoing mechanisms for resident feedback could further strengthen the connection between tourism planning and community priorities. Stakeholders also noted that residents sometimes avoid downtown areas during major events due to assumptions about overcrowding, even when nearby businesses remain underutilized. More visible communication about how visitor spending supports public services and community benefits could help strengthen understanding of tourism’s role within the local economy.

Overall, stakeholder feedback reflects an understanding of the importance of the visitor economy and a desire to build on existing programs through stronger coordination across sectors. Stakeholders consistently emphasized that the region’s assets are high-quality and competitive, and that the primary opportunity lies in better connecting those assets into a more unified visitor experience supported by coordinated marketing, operations, and infrastructure planning.



Credit: David Putzier



Credit: Colin Morton



Recommendations

1. Public-Facing Destination Data Dashboard

Objective: Increase transparency, build community trust, and enable data-driven decision-making by providing stakeholders with accessible, up-to-date information on the performance and impacts of the visitor economy.

- **Strategy:** Launch and maintain a publicly accessible tourism data dashboard that aggregates, visualizes, and translates key tourism metrics and economic impacts for residents, businesses, and decision-makers.
- **Key Partners:** Travel Lane County, Lane County, local municipalities, public land managers, economic development agencies, regional and statewide destination organizations.
- **Action Type:** Activate
- **Foundation Step:** Define core metrics and data sources. Develop dashboard platform with user-friendly visualization.

2. Tourism Roundtable Series

Objective: Enhance the regional visitor journey by creating open, collaborative forums for tactical problem-solving and creating a more seamless, integrated destination experience.

- **Strategy:** Establish regular, informal, and cross-sector forums that bring together tourism partners, such as outdoor recreation managers, rural chambers of commerce and hospitality businesses to align messaging, share data, and coordinate responses to operational challenges and opportunities.
- **Key Partners:** Chambers of commerce, Travel Lane County, tourism committees, tourism operators.
- **Action Type:** Activate
- **Foundation Step:** Launch sector-specific roundtables (outdoor recreation, events, lodging, culinary/beverage, transportation). Develop shared agenda framework focused on problem-solving.





Credit: Joni Kabana



Recommendations

3. Destination Stewardship Task Force

Objective: Establish a flexible task force to provide strategic input and brainstorming on specific initiatives, ensuring plan implementation remains aligned with community well-being and environmental health.

- **Strategy:** Create a focused, cross-sector Task Force that can be convened as needed, either regularly or on an ad hoc basis, to provide strategic guidance and brainstorming. Unlike the open, problem-solving focus of the Tourism Roundtables, this smaller group will offer targeted advisory support and brainstorming for specific plan implementation tasks, keeping key partners informed and engaged.
- **Key Partners:** Travel Lane County, Lane County, local municipalities, confederated tribes, public lands management agencies, local business, and non-profit organizations.
- **Action Type:** Activate
- **Foundation Step:** Identify a core group of representative stakeholders from key sectors and geographies. Develop a flexible charter overview outlining the Task Force’s advisory purpose and process for convening around specific topics as needed.

4. Regional Destination Knowledge Training

Objective: Elevate the quality and consistency of the visitor experience by empowering front-line hospitality staff with the knowledge and skills to serve as effective, informed destination advocates.

- **Strategy:** Establish a shared foundation of destination and visitor industry knowledge among front-line staff and community representatives that strengthens the overall destination experience.
- **Key Partners:** Lane Community College, Oregon Hospitality Foundation, local chambers of commerce, wineries, breweries, attractions, Oregon Restaurant & Lodging Association (ORLA), Willamette Valley Visitors Association (WVVA), and Oregon Coast Visitors Association (OCVA)..
- **Action Type:** Develop
- **Foundation Step:** Conduct needs assessment with hospitality employers. Develop curriculum framework covering regional assets, industry trends, and inclusive hospitality practices.



Credit: Taylor Higgins

Sustainable Tourism Framework

Overview

This framework establishes a structured approach for advancing sustainable tourism across Lane County. It aligns with internationally recognized best practices, as defined by the Global Sustainable Tourism Council (GSTC), while being tailored to reflect the destination’s specific context, priorities, and challenges. It translates global standards into a locally relevant framework that can guide decision-making, coordination, and implementation across stakeholders.

The framework is intended to be adaptive. As new initiatives are introduced and performance indicators are defined, it provides a consistent structure to ensure that efforts remain aligned with the destination’s long-term sustainability objectives.

Framework Area

Localized Intent

Community Vitality

Community vitality is positioned as a foundational element of sustainable tourism in Lane County. This area emphasizes the importance of prioritizing resident well-being and overall quality of life as the basis for maintaining a strong social license for tourism. In practice, this includes ensuring that tourism-related investments deliver clear dual-use benefits, where infrastructure and amenities serve residents as effectively as they serve visitors. Centering the resident experience helps reduce tourism-related tension and supports tourism as a positive contributor to community outcomes.

This area aligns with GSTC criteria related to community engagement, local economic benefits, and resident satisfaction, including participatory planning, equitable distribution of tourism benefits, and protection of community well-being.

Eco-System Health

Ecosystem health focuses on the active stewardship of the destination’s natural assets to ensure that recreation and visitation remain within environmental limits. Lane County’s identity is closely tied to its watersheds, forests, rivers, wetlands, and coastal systems. As access to these assets expands, corresponding investment in conservation, restoration, and wildfire resilience is critical. Protecting natural capital is essential not only for environmental integrity but also for the long-term sustainability of the visitor economy.

This area aligns with GSTC environmental criteria, including conservation of biodiversity, protection of sensitive ecosystems, resource management, and climate resilience.

Framework Area	Localized Intent
Positive-impact Agritourism	This area reflects an opportunity to strengthen regional economic resilience by more closely linking tourism demand with local food systems. Connecting urban culinary experiences with rural producers supports the retention of economic value within the region while reinforcing agricultural heritage. This approach also contributes to broader goals related to food waste reduction and recovery, improving access to nutritious food for local communities while enhancing the authenticity and distinctiveness of the visitor experience. This area aligns with GSTC criteria related to local sourcing, support for local enterprises, cultural heritage preservation, and sustainable consumption practices.

Inclusive Excellence	Inclusive excellence reflects a commitment to creating a destination that is welcoming and accessible to all. This extends beyond compliance-based accessibility to include a broader consideration of ability, identity, culture, and lived experience. Applying principles of universal design and fostering a culture of belonging ensures that the destination is accessible, inclusive, and reflective of community values. GSTC Alignment: This area aligns with GSTC social and cultural criteria, including accessibility, equity, non-discrimination, and protection of cultural integrity and community identity.
----------------------	---

Framework Area	Localized Intent
Thoughtful Dispersal	Thoughtful dispersal addresses the management of visitation across both time and geography. Lane County experiences concentrated demand during peak seasons and in high-traffic locations, which can create pressure on infrastructure and natural systems. At the same time, other areas of the county may benefit from more consistent visitation. A more balanced approach supports year-round economic stability, reduces strain in high-use areas, and distributes the benefits of tourism more equitably across the destination. This area aligns with GSTC criteria related to destination management, visitor flow management, infrastructure planning, and mitigation of overcrowding and overuse impacts.



Credit: Melanie Ryan Griffin



Credit: Melanie Ryan Griffin

Operationalizing the Framework through Governance

Effective implementation of this framework requires clear coordination mechanisms across the destination. While these concepts are detailed as actionable priorities within the tactical Pillars, they serve a specific role here as the structural anchors of Lane County’s sustainability efforts:

1. The Destination Stewardship Council

A cross-sector body composed of tourism stakeholders, public agencies, and community representatives can serve as a central forum for coordination and alignment. This group provides a consistent lens for evaluating major initiatives, helping ensure that development and investment decisions reflect shared stewardship priorities and long-term objectives.

2. Monitoring Tourism Tension

Ongoing monitoring of visitor pressure points and resident sentiment enables more proactive management of tourism impacts. This includes identifying high-use areas, such as trailheads, waterways, and coastal access points, and implementing strategies to manage capacity and visitor flow. Tracking resident perception is equally important to ensure that tourism growth remains aligned with community expectations and quality-of-life priorities.

3. The University-Community Connection

Given the significant influence of the University of Oregon on visitation patterns, strengthening coordination between the university and the broader community is critical. This includes aligning major events with local capacity and ensuring that large-scale demand generators contribute to infrastructure, mobility, and stewardship efforts.

The Stewardship Lens

To support consistent decision-making across the destination, all initiatives should be evaluated through a shared stewardship lens. As performance measures and implementation strategies are developed, the following questions provide a simple but effective framework for alignment:

- Does it contribute to the long-term health and resilience of the place?
- Is it inclusive? Can people of all backgrounds and abilities participate fully?
- Is it resident-centered? Does it improve quality of life or address meaningful community needs?



Phased Implementation Plan & KPIs

Implementation Timeline: 2027-2037

The following implementation framework organizes all recommendations into two distinct phases that reflect the nature of work required rather than arbitrary timeframes. This approach recognizes that some initiatives can begin immediately while others require foundational steps before full implementation can proceed.

Foundation Phase establishes the groundwork necessary for each recommendation to move forward. This includes activities such as conducting feasibility studies, establishing partnerships, developing frameworks and toolkits, inventorying existing conditions, securing initial funding, or launching pilot programs. Every recommendation includes a Foundation step, ensuring a clear starting point regardless of complexity.

Implementation Phase represents the execution and scaling of each initiative once foundational work is complete. This may include construction, program expansion, ongoing service delivery, continuous monitoring, or sustained advocacy. The duration of implementation varies significantly based on the action type and scope of each recommendation.

The framework is organized by the three action types identified throughout this plan:

Activate recommendations can move forward using existing assets, relationships, and authority. These initiatives typically have shorter foundation periods and can often begin generating results within the first few years of implementation.

Advocate recommendations require policy changes, regulatory action, or coordination with external agencies. Foundation work focuses on building the case, securing partnerships, and positioning these priorities within relevant decision-making processes. Implementation timelines depend on external factors and partner readiness.

Develop recommendations require significant capital investment, private sector partnerships, or multi-year development cycles. Foundation work centers on feasibility assessment, funding strategy, and partnership development. Implementation timelines extend across multiple years and often require phased construction or staged rollouts.

This structure enables parallel progress across multiple initiatives simultaneously. While long-term capital projects move through feasibility and design, immediate-impact programs can launch and deliver results. This balanced approach ensures continuous momentum while building toward transformational change.

The table that follows displays all strategic recommendations organized by pillar, with clear delineation between foundational and implementation activities. Progress should be monitored annually, with particular attention to ensuring Foundation activities remain on track to enable subsequent implementation success.

Recommendation	Action Type & Foundation Step	What Success Looks Like
Pillar 1: Close the Infrastructure Gap		
1. Premier Indoor Multi-use Sports and Event Facilities	Develop. Conduct feasibility study and develop business case with projected usage, revenue models, and capital requirements. Identify potential funding sources and build public-private partnership framework.	A funded, sited facility is hosting regional tournaments and events during winter months and measurably narrowing the winter hotel occupancy gap.
2. Optimize Existing Event Venue Operations for Group Business	Activate. Convene venue operators and tourism stakeholders to conduct an operational assessment identifying specific barriers and develop an action plan with measurable improvements for year-round utilization.	Existing venues show increased group/meeting bookings outside peak season.
3. Targeted Lodging Development in Rural Areas	Develop. Complete market analysis and site feasibility studies for priority locations. Develop incentive framework and investment prospectus for developer recruitment.	New lodging units open or under construction in rural communities and/or the Eugene Airport area
4. Glenwood and Eugene Waterfront Development	Advocate. Provide tourism industry data and economic impact projections to support infrastructure funding applications. Participate in public planning processes to ensure visitor economy needs are represented.	Visible redevelopment activity (lodging, dining, public river access) is underway.

Recommendation	Action Type & Foundation Step	What Success Looks Like
5. Willamette and McKenzie Rivers Activation	Activate. Inventory existing river infrastructure, identify gaps and priority improvement locations and develop a phased implementation plan for enhancements ranging from signage and wayfinding to capital projects, with identified funding sources and responsible parties.	Previously stalled projects have funding or responsible parties assigned; visible improvements (signage, access points) are in place.
6. Rural Trailhead Amenity Standards	Activate. Inventory existing trailhead conditions across priority corridors. Establish shared amenity standards through collaborative working group with public land managers and advocate for implementation through federal capital improvement funding.	Priority trailheads along the McKenzie, Oakridge-Westfir, and coastal corridors have updated amenities based on shared amenity standards.
Pillar 2: Build a Year-Round, County-Wide Visitor Economy		
1. Large Events for Maximizing Visitor Dispersion	Activate. Pilot a visitor dispersion strategy with 3-5 major events across different seasons.	A dispersion strategy is in active use across multiple major events; attendees are extending stays and visiting attractions beyond the event footprint.
2. Signature Winter Events & Programming	Activate. Use Event Matrix to identify existing winter events with regional potential. Encourage further partnerships to create bundled winter experiences.	A stronger portfolio of November-March events that drive regional visitor demand exists compared to baseline; partners are co-marketing bundled winter experiences.
3. Seasonal Packaging and Event Alignment	Activate. Conduct comprehensive seasonal asset inventory across all communities.	Industry partners across sectors actively share and continue to develop collaborative winter experiences.

Recommendation	Action Type & Foundation Step	What Success Looks Like
Pillar 3: Invest in Tourism that Supports Resident Quality of Life		
1. Ongoing Resident Engagement and Impact Monitoring	Activate. Establish a resident sentiment survey schedule and baseline metrics.	Resident sentiment is monitored on an ongoing basis and stays above the established baseline; community feedback visibly informs planning decisions.
2. Downtown Eugene's Safety and Vibrancy	Advocate. Quantify tourism and economic impact of safety perception issues using visitor data. Tourism partners support efforts that drive residents and visitors to downtown Eugene.	Tourism industry perspective is represented on relevant city task forces; downtown Eugene shows increased evening activity and improved safety perceptions among residents and visitors.
3. Hospitality Workforce Support	Develop. Advocate for hospitality in workforce sector programs. Support hospitality industry, education, and workforce development partners in identifying gaps and connecting to programs.	An education-to-employment pipeline connecting schools, community colleges, and hospitality employers is active; hospitality sector job retention rates show improvement from baseline.
4. Tourism Investment that Delivers Measurable Community Benefit	Advocate. Develop standardized economic impact framework and infrastructure gap assessment methodology, as well as information for public-facing community impact reporting.	Economic impact framework is being used to inform TLT allocation decisions; community impact reporting is published on an ongoing basis.

Recommendation	Action Type & Foundation Step	What Success Looks Like
Pillar 4: Improve Transportation Around the Region		
1. Accessible Car-Free Mobility Options	Develop. Identify high-demand visitor routes, tourism-relevant service windows, and accessible service requirements.	Optimized shuttle or transit service is operating between the Eugene Airport, metro area, and priority destinations; wheelchair-accessible options are included in service design.
2. Oregon Coast Trail Completion	Advocate. Document hazardous segments and develop interim safety solutions. Begin identifying visitor service opportunities that connect trail users to coastal communities.	Safety measures are in place; visitor service opportunities connecting trail users to coastal communities are identified and being pursued; funding for permanent trail completion has been secured or is actively being sought.
3. Cycling and Micromobility Integration	Activate. Map existing bike infrastructure against visitor demand patterns. Explore micromobility partnerships to expand service to hotel clusters and major attractions. Develop new or promote existing visitor-facing cycling resources.	Micromobility or bike-share service is available at hotel clusters and major attractions; visitor-facing cycling resources are published and in use.
4. Eugene Airport Expansion Partnership	Advocate. Provide visitor data and economic forecasts to support air service development and grant applications.	Visitor economy data is incorporated into airport master planning and grant applications; the airport has secured new air service or capacity investment informed in part by that data.

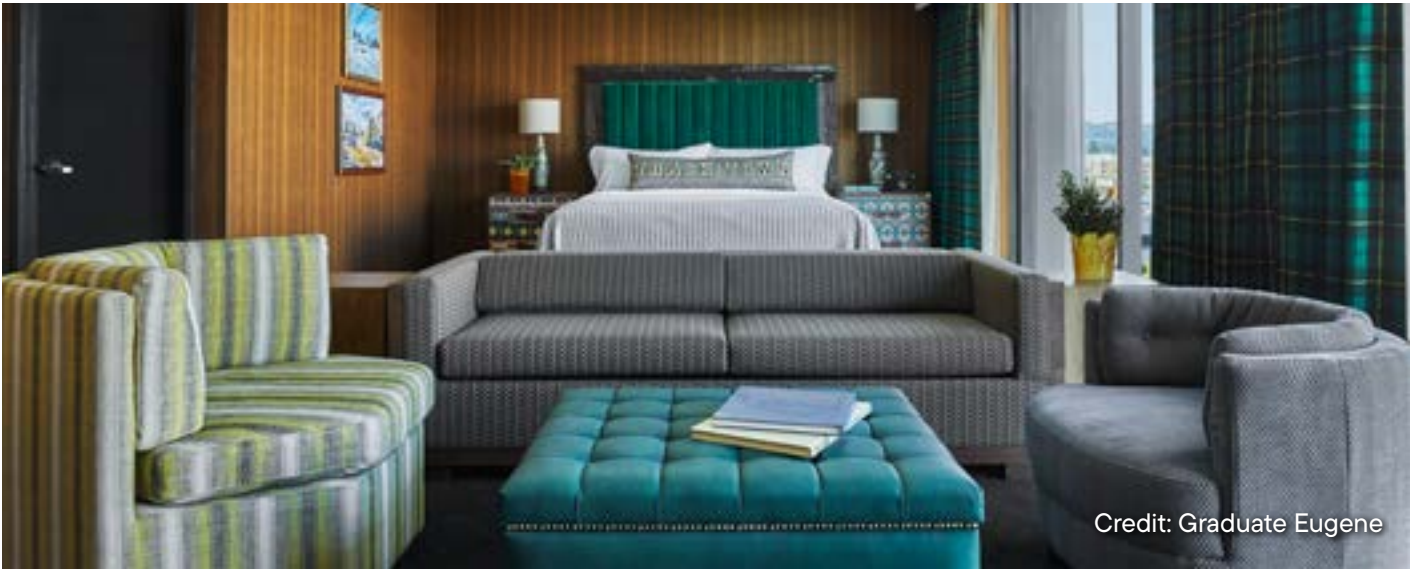
Recommendation	Action Type & Foundation Step	What Success Looks Like
Pillar 5: Champion Strong Regional Branding and Marketing		
1. Community and Regional Brand Alignment	Activate. Develop flexible brand framework that accommodates local identity expression while giving the county a regional rallying point.	A brand framework accommodating individual community identities is in use; communities are actively expressing distinct character within that regional umbrella.
2. Leadership in Inclusive, Accessible, and Responsible Outdoor Exploration	Activate. Inventory accessible recreation assets and establish partnerships with inclusion-focused organizations. Launch accessible recreation marketing initiative highlighting existing accessible experiences.	Partnerships with inclusion-focused organizations are active; the inventory of formally designated accessible experiences has grown from baseline and is reflected in destination marketing.
3. Destination Marketing Amplification through Collaboration	Activate. Launch marketing roundtable series focused on data sharing and co-op marketing opportunities.	A growing number of smaller businesses and communities are participating in co-op marketing campaigns and/or are sharing joint destination messaging.
4. Audience Segmentation and Validation	Activate. Conduct comprehensive visitor segmentation research. Further enhance audience segmentation with behavioral insights, trip planning patterns, and spending characteristics.	Validated audience segments are complete and being actively used to inform marketing campaigns, product development, and shoulder-season activation decisions.
5. Integrated Visitor Dispersion	Activate. Pilot a visitor dispersion approach that can be integrated into digital platforms visitors already use.	Visitor dispersion resources are integrated into the platforms and moments visitors are already using; the percentage of visitors exploring more than one Lane County community has grown from baseline.

Recommendation	Action Type & Foundation Step	What Success Looks Like
6. Brand Evolution from Geographic Diversity to Emotional Connection	Activate. Develop refreshed messaging framework centered on emotional connection and visitor experience themes.	Shared place messaging is in use by partners across the county who promote Lane County as a destination to live, work and visit.
Pillar 6: Convert University of Oregon Visitors into Lane County Visitors		
1. University of Oregon-Tourism Coordination	Activate. Create shared visitor communication tools, including a framework for visiting schools and peer institutions.	Visiting schools and peer institutions receive destination information through the established framework.
2. Maximization of Economic Impact from Events and University Venues	Activate. Pilot a visitor dispersion approach for UO event organizers with 2-3 major UO events.	A visitor dispersion approach is in active use across multiple UO events and is increasing regional exploration among event attendees.
3. Regional Tourism Integration into the UO Student and Alumni Lifecycle	Develop. Map UO academic calendar high-traffic periods. Develop partnership framework with University of Oregon and Alumni Association.	Visitor information tied to move-in, commencement, and other high-traffic academic periods are live and being promoted; measurable alumni and visiting-family return visitation is being tracked.

Recommendation	Action Type & Foundation Step	What Success Looks Like
Pillar 7: Connect the Industry		
1. Public-Facing Destination Data Dashboard	Activate. Define core metrics and data sources.	Businesses and decision-makers are referencing the data dashboard as a shared source of tourism performance data.
2. Tourism Roundtable Series	Activate. Launch sector-specific roundtables based on stakeholder input on priority topics.	Sector-specific roundtables are leading to coordinated action on shared challenges.
3. Destination Stewardship Task Force	Activate. Develop a flexible charter overview outlining the Task Force’s advisory purpose and process for convening around specific topics as needed.	The Task Force is actively convened as plan implementation issues arise, providing strategic input that visibly shapes decisions.
4. Regional Destination Knowledge Training	Develop. Conduct needs assessment with hospitality employers.	A training is in place and being delivered to front-line hospitality staff; participating businesses report improved staff ability to recommend experiences across the region.

Key Performance Indicators (KPIs)

Success will be measured through a comprehensive set of indicators that track progress toward Lane County’s vision of a year-round, economically resilient destination. These KPIs are organized by strategic focus area and should be monitored on an annual basis, with selected metrics tracked quarterly. The implementation team will establish specific numeric goals for each KPI during the initial implementation phase, informed by baseline data collection and stakeholder input.



Economic Resilience & Seasonality

Hotel Occupancy Distribution:

- Baseline (FY2024): 56% winter / 74% peak (June) (CoStar lodging reports)
- Target: Reduce winter-peak occupancy gap, working toward more balanced year-round performance

Shoulder Season Performance:

- Track hotel occupancy in November-March
- Target: Year-over-year growth in shoulder-season occupancy

Winter Event Portfolio:

- Baseline (2025): Only 19% of major events occur in winter (JLL’s Event Matrix and Lane County’s event inventory)
- Target: Increase percentage of major events in winter months, with winter event portfolio generating measurable overnight visitation

Visitor Spending Distribution:

- Establish baseline distribution of visitor spending across Eugene-Springfield, Florence, Oakridge-Westfir, Cottage Grove, and McKenzie communities
- Target: Meaningful increase in rural and coastal community visitor spending



Visitor Dispersion & Regional Connectivity

Multi-Community Visitation:

- Track percentage of visitors who explore 2+ Lane County communities during single trip
- **Target:** Growth in the percentage of visitors who experience multiple communities during their trip

Average Length of Stay:

- Establish baseline average length of stay
- **Target:** Increase average length of stay

Shoulder-Season Performance:

- Shoulder-season lodging occupancy rates in rural communities (Florence, Cottage Grove, Oakridge-Westfir)
- **Target:** Increase November-March occupancy in identified rural markets



Community Well-Being & Support

Resident Sentiment Score:

- Baseline (2025): 79% positive tourism perception (Destination Master Plan’s Resident Sentiment Survey)
- **Target:** Maintain positive sentiment above established threshold
- Monitor through resident survey

Tourism-Related Quality of Life Indicators:

- Track resident perceptions of:
 - › Recreation access improvements
 - › Infrastructure improvements
 - › Traffic/crowding concerns
 - › Cost of living concerns
- **Target:** Improve positive perception scores

Workforce Stability:

- Hospitality sector job retention rates

Community Benefit Visibility:

- Dollars invested in dual-use infrastructure (serves residents and visitors)
- **Target:** Establish transparent annual reporting of TLT revenues generated, projects funded, and community outcomes delivered (e.g., trail miles maintained, public restrooms added, historic structures preserved)



Industry Collaboration & Coordination

Industry Participation:

- Number of businesses/organizations participating in:
 - › Tourism roundtables
 - › Collaborative marketing initiatives
- **Target:** Expand active industry participant base

Event Conversion:

- Percentage of major event attendees who extend stay beyond event tracked via post-event visitor surveys in partnership with event organizers.
- Percentage of event attendees who visit attractions outside event footprint
- **Target:** Achieve meaningful event conversion rate

University Partnership Integration:

- Number of UO partnership programs linking campus visitors to regional experiences
- **Target:** Establish active partnership programs



Infrastructure Development

Lodging Capacity:

- Number of new lodging units in priority rural areas (Florence, Oakridge-Westfir, Cottage Grove, Eugene Airport)
- **Target:** Meaningful new room inventory in underserved markets

Trailhead Amenity Compliance:

- Percentage of high-use trailheads meeting established amenity standards
- **Target:** Achieve substantial compliance with amenity standards

Indoor Event Facility:

- Progress milestones: feasibility complete, funding secured, construction initiated, facility operational
- **Target:** Facility operational within strategic plan timeframe

Conclusion: A Vision for a Resilient Lane County

The Work Begins Now

The preceding pages have detailed the full picture: the data, the priorities, the recommendations, and the honest assessment of where Lane County stands. You have also seen something else: a pathway forward that is ambitious but achievable.

This plan was built to be used by anyone working to shape Lane County’s future. The strategies in this plan connect directly to the work already underway in transportation planning, community development and placemaking. Tourism doesn’t exist in a silo, and neither does this plan. The same investments that make Lane County more welcoming to visitors make it more livable for the people who call it home. We hope planners, elected officials and community organizations will use this when they’re building their own strategies. What we’re all pointing toward is a region that has decided to be intentional about its future.

Confident, clear, well-positioned destinations with year-round economic resilience are sustainable.

To achieve this takes vision, strategic investment, and coordinated efforts. This work builds a community where businesses are vibrant, residents thrive and visitors want to visit.

The people who contributed to this process — residents, business owners, community leaders, elected officials — already showed us what’s possible when Lane County works together. This plan is where that commitment becomes action.

Thank you for being part of it. Let’s see what we can build.

Appendix

Destination Master Plan Steering Committee

We would like to extend our heartfelt appreciation to the dedicated members of the Steering Committee, as well as the stakeholders and partners across the community who actively participated in the Destination Master Plan for Lane County. Without their unwavering support and commitment, this plan would not have been possible. Thank you all for your contributions.

Name	Organization
Alyssa Brownlee	Horse Creek Lodge & Outfitters
Bettina Hannigan	Florence Area Chamber of Commerce
Corey Buller	Lane Events Center
George Rogers	Graduate by Hilton Eugene
Ian Dobson	Eugene Marathon
Jason Harris	Lane County
Jesse Quinn	Lane Workforce Partnership
Jessica Thomas	Sweet Cheeks Winery
Joshua Bates	City of Eugene - Library, Recreation and Cultural Services
Matt Peterson	Willamette National Forest
Matt Roberts	University of Oregon
Megan Messmer	City of Florence
Michael Wargo	Willamalane Parks and Rec
Sarah Smith	InnCline Management
Tara Wibrew	Lane Arts Council
Vanessa Tharp	Vanessa Tharp LLC Events and Consulting
Vonnie Mikkelsen	Springfield Area Chamber of Commerce



Tourism Readiness Index

The Tourism Readiness Index analyzed data for each destination in the following categories:

Scale: Measures the size and capacity of the destination’s tourism infrastructure, reflecting its ability to accommodate visitors.

Concentration: Evaluates the destination’s appeal as a leisure hub, where visitor activity clusters around signature attractions and distinctive districts.

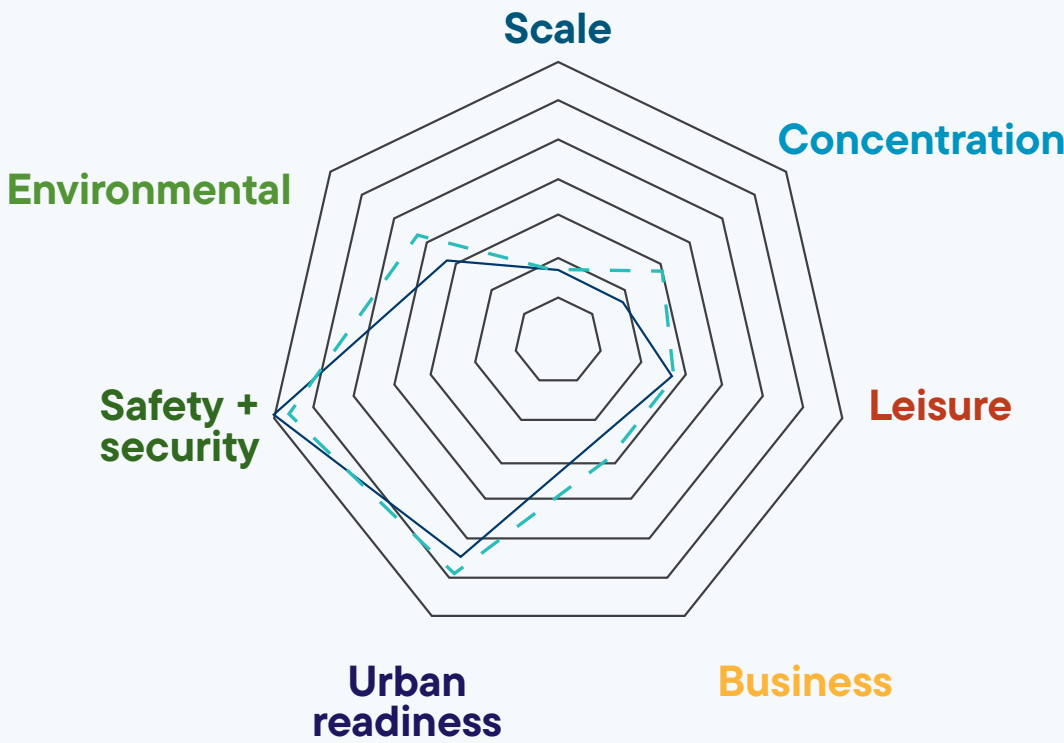
Leisure: Assesses visitor spending patterns, destination attractiveness, and the quality of cultural heritage sites, natural landmarks, and retail offerings.

Business: Examines the maturity and contribution of the business travel segment to overall destination activity.

Urban Readiness: Captures infrastructure investments that enhance internal mobility, making the destination more accessible and attractive to business, talent, and tourists.

Safety and Security: Reflects the destination’s commitment to visitor and resident safety through comprehensive policies and operational practices.

Environmental Readiness: Measures sustainability prioritization through strategic frameworks, policy implementation, and destination positioning on environmental stewardship.



Global Destinations’ Readiness for Sustainable Tourism

- Tourism Readiness Index is the product of a partnership between JLL and the World Travel & Tourism Council (WTTC) to assess global cities’ tourism readiness.
- While readiness will depend on the ambitions and goals of every city, WTTC & JLL define tourism readiness as a strategic and all-inclusive approach that proactively addresses and implements factors and policies relating to scale, concentration, leisure and business offerings, environmental and urban readiness, safety & security as well as the prioritization of tourism.
- Indeed, no two destinations are better or the same and, as such, the challenges they will face, and the opportunities to unlock their tourism potential, will differ.
- However, commonalities can be identified to provide a framework through which cities can assess their context and plan for the future.

Tourism Readiness Index

Comprehensive analysis addresses what makes a destination ready for sustainable Travel & Tourism.
Assess current positioning and ability to manage growth
Indicators | 70 data points across all facets of the tourism economy
Outcomes | seven (7) categories and five (5) destination typologies



Tourism Readiness Index Categories

1.

Scale
2.

Leisure
3.

Environmental readiness
4.

Safety and security
5.

Concentration
6.

Business
7.

Urban readiness

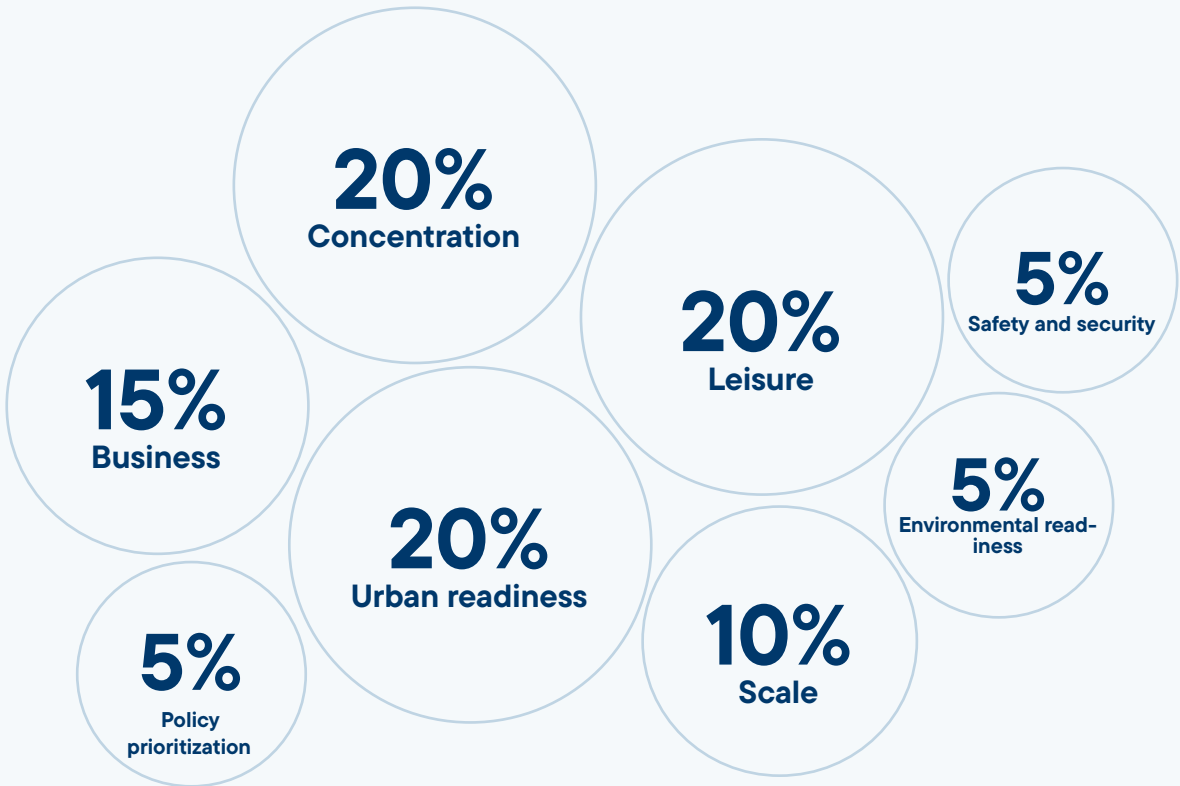


Globally recognized tool validated by over 100 domestic and international destinations + World Travel & Tourism Council

Levels of readiness | Destination typologies

Dawning Developers	Emerging Performers	Balanced Dynamics	Mature Performers	Managing Momentum
Limited tourism infrastructure Gradual tourism growth Opportunities ahead with planning	Growing momentum Rising infrastructure Opportunities for strategic development Smaller scale –may experience pressures	Established infrastructure Growth in business and leisure paces with scale Equalized scale and concentration	Strong leisure and/or business travel dynamics Established tourism infrastructure Proactively manage pressures & capacity building	Historically high growth momentum Aging or strained tourism infrastructure Feeling the pressures of scale & concentration

Weights by Category



Demand Driver Scorecard

Process - Multi-step assessment of destination assets



Utilize visitor traffic and flow data to assess current demand



Place individual assets on scale based on eight criteria to score



Rate anything that is a 6-7 or greater as the destination Attractors



Utilize the outcome to identify future competitive positioning



Recommend new investment or enhancement to grow assets on the scale

Demand Driver Scorecard Scoring

	Largely local asset	Fairly connected asset	Most connected asset	Tourism demand generator	Very compelling demand generator	Most compelling demand generator
Attractor level						
	Primarily of local interest	Interesting to do on repeat visit	“Must see” if in the area	Targeted regional draw	National draw	Worldwide draw
Visitor level of interest						
	1 - 19	20 - 39	40 - 59	60 - 79	80 - 94	95 - 100
Rating						

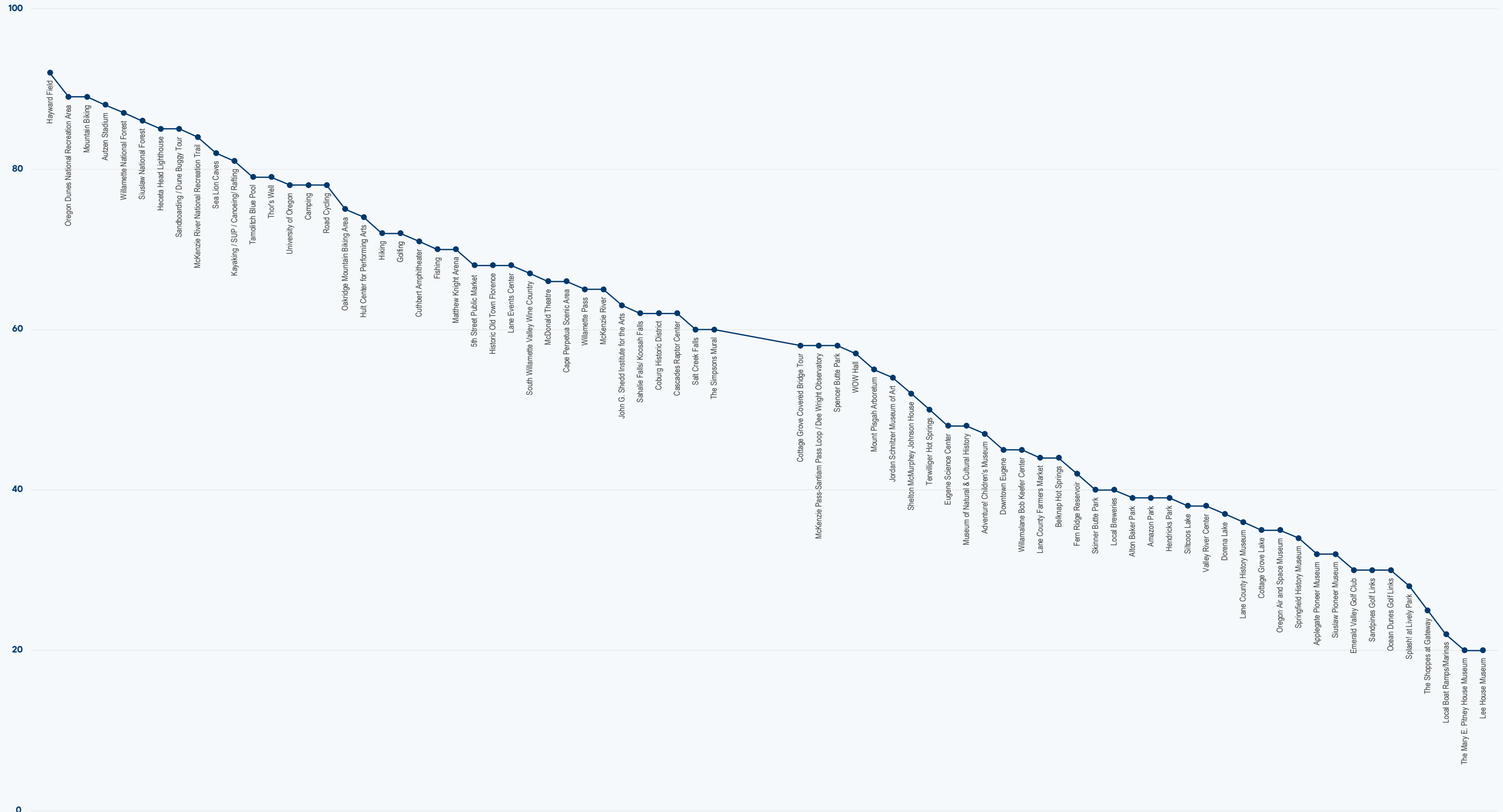
Demand Driver Scorecard

Scorecard Criteria

Item	Definition	Max Point Value
1. One of a Kind	Captivating content or collections that drive interest and appeal (proximity of alternative similar offerings can be a factor in overall uniqueness)	25
2. Iconic Scale	Dramatic visual prompting a curiosity powerful enough to inspire a visit (Instagram worthy- trying to capture a moment)	20
3. Engaging Visitor Experience	Interaction between the guest and the attraction	15
4. Current Visitor Demand	Current level of visitor traffic, reviews, etc.	15
5. Visitor Journey	Ease and accessibility of the complete visitor experience from initial planning to arrival, including ticketing convenience (online availability), tour package integration, cultural/natural network affiliations (e.g., museum associations, national parks), and transportation accessibility options	10
6. Identified target audience(s)	Multiple target audience and visitor types can be targeted based on overall connectivity	10
7. Future unique development	Multiple target audience and visitor types can be targeted based on overall connectivity	5
Total		100



Lane County Demand Driver Scorecard



Event Matrix

Purpose – Utilize criteria that cause events to drive return to understand the current landscape of events generating the desired outcome AND position the tourism industry to support up and coming events to be successful.



Identify key events serviced by destination events



Rate events on matrix using 11 criteria



Identify those events that can grow in specific areas through matrix outcomes



Work with organizers on tactics for implementation

Event Matrix Process

JLL’s innovative Event matrix product is designed to empower event planners, civic leaders, and local and regional stakeholders with the insights needed to make proactive strategic decisions to invest and capitalize on leisure events.

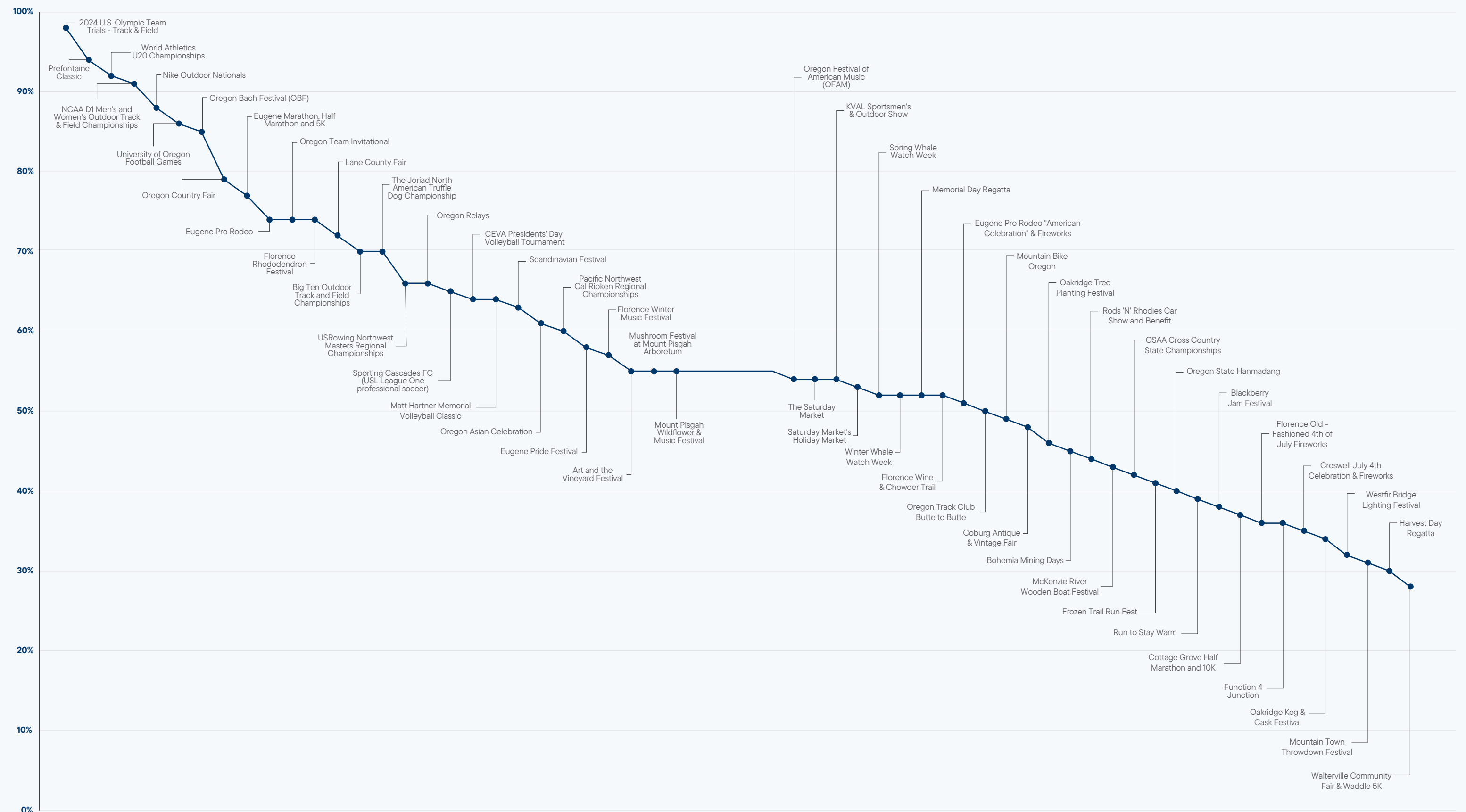
 Event level	Largely local event	Fairly connected event	Most connected event	Tourism demand generator	Very compelling demand generator	Most compelling demand generator
 Visitor level of interest	Primarily of local interest	Interesting to do on repeat visit	“Must see” if in the area	Targeted regional draw	National draw	Worldwide draw
 Rating	1 - 19	20 - 39	40 - 59	60 - 79	80 - 94	95 - 100

Event Matrix

Matrix Criteria

Item	Definition	Max Point Value
1. Benefit to Destination Brand	Will the event impact the destination’s overall attractiveness?	20
2. Innovation and uniqueness	Has this event been repeated in many destinations, or does it have a unique feature/experience that drives a larger audience?	15
3. Economic impact (direct spending)	Direct spending, driving revenue to local businesses, broader impact on the local community, evidence of reporting	10
4. Overnight stays (room nights)	Is overnight visitation impacted by this event?	10
5. Scalability of event	Is the event scalable with potential to grow?	10
6. Time of year – need periods	Is the event planned in a period that traditionally has lower demand and therefore would benefit from a new “demand generator”?	10
7. Evidence of partnerships/ sponsorships	Who are the partners that are involved in this event?	5
8. Organizational structure & management capability	Internal structure of the event management team and their related experience	5
9. Clearly defined target market (s)	Research and data gathering process for specific target audiences	5
10. Comprehensive marketing plan/approach	Target audiences, tactics to reach the targets, resources to create awareness	5
11. Green Practices and Sustainability Commitments	Evidence of sustainability initiatives and practices	5
Total		100

Lane County Event Matrix



EUGENE CASCADES AND COAST



JLL SEE A BRIGHTER WAY