

# Wilsonville Tourism Promotion Committee



## MEETING AGENDA

Tuesday, Jan. 30, 2018 • 1 – 3 pm

Willamette River Room, Wilsonville City Hall

### VOTING MEMBERS

**Jeff Brown, Chair**  
General Manager,  
Holiday Inn Wilsonville

**Darren Harmon,**  
**Vice Chair**  
General Manager,  
Family Fun Center

**Al Levit**  
Commissioner, Wilsonville  
Planning Commission

**Dave Pearson**  
Executive Director,  
World of Speed  
Motorsports Museum

**Brandon Roben**  
Executive Director,  
Evergreen Aviation &  
Space Museum

**David Stead**  
General Manager,  
Langdon Farms Golf  
Club

### ADVISORY / EX-OFFICIO MEMBERS

**City of Wilsonville**  
City Councilor Charlotte  
Lehan, Council Liaison  
Michael McCarty, Parks &  
Recreation Director  
Brian Stevenson, Parks &  
Recreation Program  
Manager (designee)

**Clackamas County  
Tourism & Cultural  
Affairs (TCA)**  
Danielle Cowan, Director  
Jim Austin, Community  
Relations Lead  
(designee)  
Casey Knopik,  
Development Specialist  
(designee)  
Samara Phelps,  
Development Lead  
(designee)

**Washington County  
Visitors Association  
(WCVA)**  
Carolyn McCormick,  
President/CEO  
Sylke Neal-Finnegan,  
VP/Marketing &  
Communications  
(designee)

**Wilsonville Area  
Chamber of Commerce**  
Kevin Ferrasci O'Malley,  
CEO

### STAFF

Mark Ottenad,  
Public/Government  
Affairs Director

### OPERATIONS AND DEVELOPMENT COORDINATOR

Vertigo Marketing,  
Lynette Brailard  
and Trev Naranche,  
Principals

- 1. Welcome 1:00**
  - Committee members and guests self-introductions
  - Jan. 4 Mayor's Appointment to Position No. 1, term ending 6/30/2019: Dave Pearson, World of Speed Motorsports Museum
- 2. Committee Business and Updates 1:10**
  - Approve Prior Meeting Minutes of Dec. 12, 2017 \*
  - Open position for recruitment:
    - Position 7, term ending 6/30/2018 (can re-appoint to 3-year term)
  - Decide March Committee Meeting Schedule: Tourism Grant Reviews
    - Two tourism grant programs with different criteria:
      - City Community Tourism Grant Program: \$25,000
      - County Community Partnership Grant Program: \$20,000
    - One long evening meeting or two short evening meetings; open dates:
      - Thur 3/15; Wed 3/21; Thur 3/22
- 3. Tourism Promotion Marketing Plan Revised, Vertigo Marketing 1:25**
  - Review and Approve "Marketing Playbook" Plan, Revised Jan. 2018 \*
  - "Pocket Trips" creative Campaign Mark and Ad \*
  - Scope of Work, Revised Jan. 19, 2018: 2018/2019 Advertising & Marketing Services \*
    - Contractor retainer-services fees and pass-through costs clarified
    - City Council approval scheduled to Feb. 22
  - Visitor Profile Study
    - Review proposals by Destination Analysts, Inc., and RRC Associates \*
- 4. Adjourn 3:00**
  - Date of next meeting: Tue, Feb 13, 1-3 pm

\* materials in packet    ■ materials at meeting

## UPCOMING EVENTS OF NOTE

### 2018 IITA Summit, Portland, Ore.

February 4 - 7, 2018

Travel Portland is the official host of the 2018 IITA Summit. IITA is a one-on-one appointment marketplace for inbound tour operators and U.S. Suppliers to plan travel for international visitors. The Summit also provides a variety of educational sessions on topics that impact the industry that will help shape your strategy for the coming year.

For more information or to register, visit: <https://iita.travtrade.com/Register>.

If you are interested in sponsorship opportunities, contact: [ashley@travelportland.com](mailto:ashley@travelportland.com).

### Tourism Tech Symposium

Wednesday, March 7

Mt. Hood Territory is proud to present our annual Tourism Tech Symposium! Join us for fun and informative sessions designed to help you improve your business's digital marketing strategy. This year's topics include:

- Managing social media
- Website design and content
- Online business presence
- Current trends in digital marketing

Learn, network, and have your digital marketing questions answered at this special event! Find the schedule of events at the link below.

\$10 admission includes lunch and all information sessions. Please register by March 6.

RSVP: <https://www.eventbrite.com/e/2018-clackamas-county-tourism-tech-symposium-tickets-42538301204>

### 2018 Oregon Governor's Conference on Tourism, Bend, Ore.

April 29 - May 1, 2018

The Oregon Governor's Conference on Tourism is the state's premier gathering for tourism professionals.

Each spring, Oregon's travel and tourism industry comes together at the Oregon Governor's Conference on Tourism. We gather to educate, share and develop new ways to create the best Oregon experience possible for our visitors and the industry itself. The 2018 conference will be held at the Riverhouse on the Deschutes in Bend. Registration for the event will open in January 2018.

Info: [www.OregonTourismConference.com](http://www.OregonTourismConference.com).

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### Vertigo Marketing Contact Info - [www.VertigoMarketing.com](http://www.VertigoMarketing.com)

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# **Wilsonville Tourism Promotion Committee**

## **MEETING MINUTES**

**Tuesday, Dec. 12, 2017 • 1 – 3 pm**

Willamette River Room, Wilsonville City Hall

### **1. Call to Order; Welcome & Introductions**

**Voting members attending:** Jeff Brown, Chair; Darren Harmon, Vice Chair; Al Levit; and Brandon Roben. David Stead absent.

**Ex-officio members, staff, consultants and guests attending:** Erica Behler; Lynnette Braillard; Mike McCarty; Kevin Ferrasci O'Malley; Samara Phelps; Trev Naranche; Sylke Neal-Finnegan; Mark Ottenad; Dave Pearson; Brian Stevenson; and Elaine Swyt.

Chair Brown welcomed to the committee Brandon Roben, Executive Director of the Evergreen Aviation and Space Museum in McMinnville and a Wilsonville resident, who was appointed by Mayor Tim Knapp with Council concurrence to Position No. 2, term ending 6/30/2019, on Dec. 4.

Chair Brown also welcomed Dave Pearson, the new Executive Director of the World of Speed Motorsports Museum, who has indicated an interest in serving on the committee.

Chair Brown noted that Emily Bryant Utz was no longer with the World of Speed Motorsports Museum and had effectively resigned from the committee, Position No. 1.

### **2. Committee Business and Updates**

**Approve Meeting Minutes of Prior Meeting:** Committee members reviewed the draft meeting minutes of Nov. 7, 2017. Al Levit moved and Brandon Roben seconded the motion to adopt the meeting minutes as presented. Motion approving minutes passed unanimously.

**Recruitment for vacant positions on committee:** Mark Ottenad said that the committee has two vacant positions. Assuming that Dave Pearson is appointed in January to the vacancy of Position No. 1, then position 7 with a term ending 6/30/2018 is still vacant.

**2018 Committee Meeting Schedule:** Mark Ottenad provided the results of the “Doodle” poll of tourism committee members that showed the best meeting dates for a majority of the committee in the first portion of 2018 were Jan 30 and Feb 13, both 1-3 pm. Committee members discussed the various date options, and agreed that Tuesday, Jan. 30, and Tuesday, Feb 13, 1-3 pm, would be the dates for the next committee meetings.

### **3. Tourism Promotion Draft Marketing Plan - Vertigo Marketing**

Lynnette Braillard and Trev Naranche, principals of Vertigo Marketing, presented on the Scope of Work (SOW), Draft 1: 2018/2019 Advertising & Marketing Services, that was relayed to the committee a week prior to the meeting. Mark Ottenad indicated that the draft scope of work would become a component of contract (PSA) with Vertigo Marketing as either an amendment or new PSA, whichever Legal decided make the most sense.

Members inquired about more detail on item A) Website Retainer Services. Lynnette Braillard indicated that they were planning to conduct a more detailed audit of the website and look at

other service potentials, including using customizable online directories rather than linking to commercial services like Yelp.

Committee members discussed item D) Pocket Trips Visitor Guide. Lynnette Braillard indicated that print products would be distributed to visitor information centers, hotel racks and chamber kiosks. Jeff Brown noted that he could arrange a display at Wilsonville Holiday Inn. Kevin Ferrasci O'Malley thought that the total quantity to be printed was too high; Trev Naranche noted that distribution would tend to be greater outside the Wilsonville market. Committee members suggested that it would be worthwhile to relay materials to corporate headquarters in Wilsonville. Trev Naranche said he would provide a guide distribution list with the updated SOWs and look into additional distribution with Certified Folder and others.

Jeff Brown pointed out that sports tournaments can be tricky to arrange in advance for lodging since the tournament teams are often not known much in advance—may be only a week notice as to which teams are advancing to the next round.

In reviewing item F) Social Media Retainer Services, members clarified that SEO (search engine optimization) data from social media would be used to boost website traffic.

In relation to items D. Pocket Trips Visitor Guide and K. Media Buys, Kevin Ferrasci O'Malley wondered if the plan budgets too much on print-related advertising. Lynnette Braillard and Trev Naranche indicated that the print-advertising was actually joint print-online advertising packages offered by tourism publications; they also suggested that a new brand and destination would need additional promotion via standard, top-line tourism publications that can also provide 'earned media' content promotion. Sylke Neal-Finnegan agreed that more resources to be dedicated to digital media would be beneficial; she recommended inclusion in the Travel Oregon and Travel Portland guides and the Washington State tourism publications rather than Sunset or other magazines.

Jeff Brown asked how often would online data be reviewed. Trev Naranche replied quarterly.

Committee members reviewed item I) Email Marketing Services. Lynnette Braillard and Trev Naranche indicated that they would use whatever email list that we can development utilizing all lead-generating platforms. They noted that they would constantly track expenditures, and web traffic data quarterly.

Sylke Neal-Finnegan asked if the Travel Oregon marketing buy includes email leads. Trev Naranche said that the plan does not use Travel Oregon 'email blasts,' as Vertigo Marketing has not found those to be an effective promotional tool. Lynnette Braillard stated they would inquire if Travel Oregon leads are included as part of the print media buy.

Jeff Brown asked what markets would Vertigo Marketing suggest be a comparable for Wilsonville using the STR subscription service STAR reports that provide hotel data benchmarking worldwide. Trev Naranche indicated that this was a good question/issue, and he was not clear which exact community might be a good comparable.

Members discussed that they could see how various components of the plan could change over time, based on new information, potential leverage opportunities with tourism partners, and other factors. Darren Harmon indicated that it was important that the plan be able to be flexible on the exact marketing promotions used as time progresses. He suggested that the budget be set at the \$200,000 amount and that expenditures within that cap be flexible. Mark Ottenad said that he would be sure to communicate the committee's desire for flexibility in exact expenditures to Legal and Council.



The committee decided to table until the next meeting discussion of proposals for a Visitor Profile Study that could be funded via the City's normal budgeting process, with a request to Council to utilize prior unexpended tourism revenues.

Lynnette Braillard and Trev Naranche then reviewed Pocket Trip Ideas, Draft 1 for proposed 12 thematic day trips, including the proposed creative designs and formats. They noted a change from the original tagline/phrase proposal from "back pocket" to just "pocket," recognizing Sylke Neal-Finnegan's comment from the prior meeting regarding WACC's use of the phrase "Portland's back yard." So, the tagline/phrase could be used as "a pocket (of fun)," They suggested the primary colors to be used would be earth tones of green and gray.

Committee members indicated great pleasure with the draft designs and mocked-up concepts. The jean's tab was noted on the pocket design, along with a smile shape to indicate fun. Committee members like the in particular the design that included "Oregon" along with "Wilsonville."

Some pocket trip day-trips Lynnette Braillard suggested include a Family Fun theme with Family Fun Center and World of Speed Museum, as well as a "Weekend in Wilsonville." Lynnette Braillard recommended we use the World of Speed pocket trip (possibly paired with the Family Fun Center) for both the annual Travel Oregon and Travel Portland visitor guides (due in January). The World of Speed museum was chosen because it is a unique, year-round attraction that most people have not heard about. Dave Pearson added that the World of Speed would be running a print ad in the Travel Oregon guide as well.

Jeff Brown noted that the tourism program should advertise or promote those businesses with exceptional customer service – the kinds of places that one would recommend to visitors because of the quality of the attraction and the staff.

The conversation turned to the Wilsonville tourism program moniker and website name. Lynnette Braillard and Trev Naranche said that after further review and working with the creative materials, that they found "ExploreWilsonville" to be preferable to "VistWilsonville." Jeff Brown and Darren Harmon agreed that use of the phrase "Explore" provides a better connection between the Wilsonville residential community and tourism promotion efforts. Brandon Roben noted that "explore" and "fun" seem to go well together. All of the committee members appeared to agree that "ExploreWilsonville" would work well.

Darren Harmon moved to approve the draft tourism marketing plan expenditures as outlined in 2018/2019 Advertising & Marketing Services Scope of Work; Jeff Brown seconded the motion. Committee members discussed the need for a caveat for flexibility in the final exact components implemented. The motion was approved unanimously.

#### **4. Adjourn**

The meeting ended at 3:10 pm; Chair Brown noted that the next meeting of the Tourism Promotion Committee is scheduled for Tuesday, Jan. 30, 1-3 pm, at City Hall.

#### **Attachments — Dec 12, 2017, Meeting Materials Presented:**

- P2018-2019.SOW-Advertising&Marketing Services.DRAFT-1\_12\_05\_2017.pdf
- Pocket-Trip-Ideas.DRAFT-1\_12\_05\_2017.pdf

Respectfully submitted by Mark Ottenad on Dec. 26, 2017.





CITY OF WILSONVILLE  
2017/2018 MARKETING PLAYBOOK



WILSONVILLE  
OREGON

JANUARY 2018







# TABLE OF CONTENTS

Table of Contents . . . . .	1
Who is Vertigo? . . . . .	2
Tourism by the Numbers . . . . .	3
Vertigo’s Compass . . . . .	5
Marketing Model . . . . .	6
Promoting Wilsonville. . . . .	7
Goals & Objectives . . . . .	8
SWOT Analysis . . . . .	10
How We Measure Success. . . . .	11
FY17/18 & 18/19 Marketing Plan . . . . .	12-13
The Logo & Style Guide . . . . .	14-15
Creative Brief & Campaign Strategy . . . . .	16-20
Geography . . . . .	21
Mood Board . . . . .	22-23
Ad Samples . . . . .	24
Ad Campaign & Media Buys . . . . .	25



## WHO IS VERTIGO?

**VERTIGO MARKETING** is a full-service innovative marketing agency dedicated to enhancing Wilsonville's economy by attracting as many visitors as possible to the City, and once they're here, ensuring those visitors spend as much money as possible with local businesses.



## 76 PERCENT

VISITORS FROM OUT-OF-STATE ACCOUNT FOR 76% OF OVERNIGHT SPENDING WITH 64% OUT-OF-STATE AND 12% INTERNATIONAL

## \$10.8 BILLION

SPENT BY VISITORS IN THE STATE OF OREGON LAST YEAR

## 10-15

NUMBER OF TIMES BEFORE SOMEONE NOTICES YOUR MESSAGE AND FOLLOWS YOUR CALL TO ACTION

## 28.4 MILLION

DEAN RUNYAN ESTIMATE OF ESTIMATED OVERNIGHT VISITORS LAST YEAR

## 31:1

ROI FOR DESTINATIONS THAT INVEST IN DESTINATION MARKETING AND PROMOTION

## \$11.3 BILLION

AMOUNT TRAVELERS INJECTED INTO THE STATES ECONOMY LAST YEAR

## \$507 MILLION

AMOUNT THE TRAVEL INDUSTRY GENERATED IN STATE AND LOCAL TAX REVENUE LAST YEAR

## 109,000

JOBS CREATED IN THE STATE OF OREGON FROM TOURISM LAST YEAR

## \$1 INTO \$237

LONGWOODS AD ACCOUNTABILITY STUDY SHOWS THAT OREGON'S ADVERTISING GENERATES \$237 IN VISITOR SPENDING FOR EVERY \$1 INVESTED







## MISSION

Vertigo Marketing's mission is to enhance the economic vitality of the community by promoting Wilsonville as a year-round visitor and event destination by maximizing collaborative partnerships, efficiently activating lodging tax revenue into effective marketing programs, and cultivating an exceptional visitor experience.

## VISION

The vision is to provide the best delivery of tourism promotion services and information to Wilsonville visitors, to be the tourism marketing resource of choice for businesses in Wilsonville, and to establish sound financial management practices for public tourism tax dollars.

## PURPOSE

Explore Wilsonville is an economic development organization whose function is to create an effective mix of marketing programs which are designed to produce a positive economic impact of visitor spending and lodging occupancy in Wilsonville. Developing and implementing these programs results in enhancing the City's livability by providing year-round employment and attracting new business growth and relocation. Explore Wilsonville promotes the entire City and works in partnership with all sectors of Washington and Clackamas Counties, and Travel Oregon.

## VALUES

- Stewardship of Public Funds
- Optimum Trust and Relationship with the Citizens of Wilsonville, the City Staff, the Tourism Promotion Committee, and Wilsonville City Council
  - Innovation, Creativity and Excellence in All That We Do
    - Collaboration with Key Partners
    - Highest Level of Ethical Standards
- Reflect the Family-Friendly, Inclusive, and Welcoming Nature of the Community

# THE MARKETING MODEL (aka The Community Tourism Funnel)

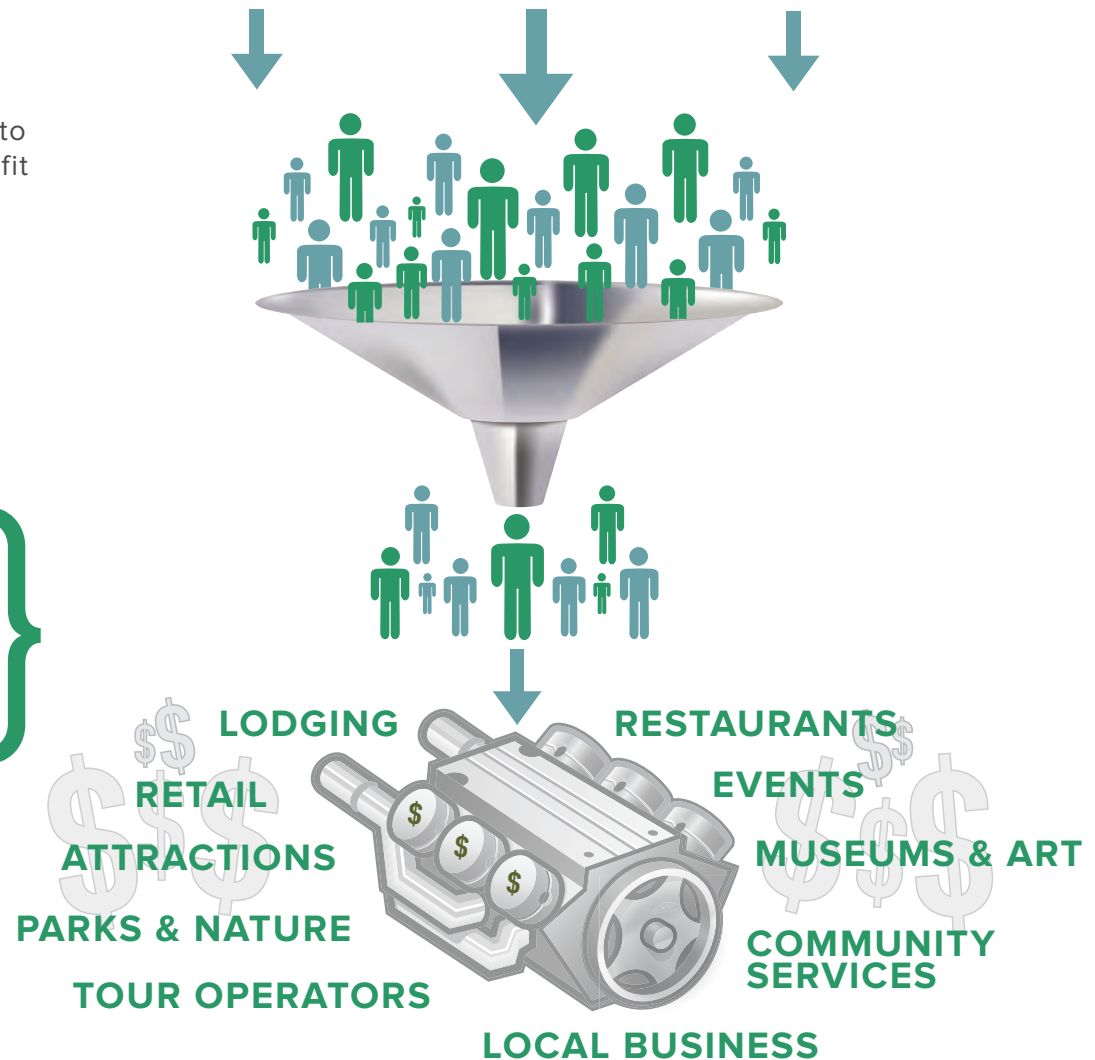
Virtually everything Vertigo Marketing does is designed to drive traffic to Wilsonville and [EXPLOREWILSONVILLE.COM](http://EXPLOREWILSONVILLE.COM). Vertigo's marketing model is founded on the fundamental strategy of generating customers through a comprehensive mix of **MARKETING** and **PUBLIC RELATIONS** programs, then driving those customers to [EXPLOREWILSONVILLE.COM](http://EXPLOREWILSONVILLE.COM) where they are connected to Wilsonville's tourism stakeholders.

As a non-membership, City funded tourism website, Explore Wilsonville offers **free listings on [EXPLOREWILSONVILLE.COM](http://EXPLOREWILSONVILLE.COM)** to tourism stakeholders to ensure transient room tax dollars benefit the entire tourism industry.

The premise is, we attract visitors to Wilsonville and provide opportunities for local businesses to convert those visitors to customers.

**EXPLOREWILSONVILLE.COM**  
is the engine that converts marketing efforts to revenue for local businesses.

**RESPONSIVE WEBSITE • PRINT ADS • SOCIAL MEDIA • DIGITAL MARKETING • VISITOR GUIDE • PR • PHOTO/VIDEO**



**PRINT  
COLLATERAL**  
ADS | VISITOR GUIDE

**WEBSITE**  
EXPLOREWILSONVILLE.COM

**REPORTING**  
OCCUPANCY  
ONLINE | SOCIAL | PR  
ACCOUNTING

**IMAGERY**  
PHOTOGRAPHY | VIDEO

**MARKETING  
STRATEGY**  
OFF-SEASON  
PROMOTIONS

**DISTRIBUTION**  
VISITOR GUIDE FULFILLMENT

**ADVERTISING**  
PRINT | DIGITAL | SOCIAL | SEO

**SOCIAL  
MEDIA**  
ENGAGEMENT & CHANNEL  
GROWTH

**EVENT  
PROMOTION**  
FESTIVALS | SPORTS  
CULTURAL | CONCERTS

**LEAD  
GENERATION**  
LIST BUILDING

**CREATIVE**  
COLLATERAL | BRANDING  
MARKETING

# FY17/18 & 18/19 GOALS & OBJECTIVES

- Achieve growth in lodging tax revenue.
- Launch Explore Wilsonville's tourism advertising campaign.
- Develop a comprehensive media schedule to advertise the City and its events to potential visitors.
- Rebrand current site to enhance the visitor website experience and align with destination branding. Recommend using the URL [ExploreWilsonville.com](http://ExploreWilsonville.com).
- Position the City as a compelling tourist destination in the Willamette Valley.
- Work with community partners to increase visitor traffic during key events throughout the year.
- Increase visitor count during the shoulder and winter seasons.
- Work with City staff and the City's Tourism Promotion Committee to maximize exposure to visitors at a reasonable cost.
- Grow meeting and convention business, and bleisure travel.
- Improve communication and collaboration with Clackamas County Tourism & Cultural Affairs, Washington County Visitors Association, and Travel Oregon.









# SWOT ANALYSIS

Wilsonville's **STRENGTHS**, **WEAKNESSES**, **OPPORTUNITIES**, and **THREATS**.

## STRENGTHS

- A nexus for outdoor activity, attractions and lifestyle
- Nature & outdoor recreation, history, heritage, art and culture
- Premier shopping nearby (Outlets, Bridgeport)
- Easy access and central location to Oregon's two largest cities: Portland and Salem
- Affordable lodging and hotels
- Agri-tourism opportunities (wineries, farms)
- Genuinely friendly community, safe, clean, modern
- Parks, trails, open spaces, urban amenities, rivers, close proximity to the Pacific Ocean and Mt. Hood
- Commercial attractions (World of Speed, Family Fun Center & Bullwinkle's) and regional events (equestrian, sports)
- Hilton Garden Inn opening (first 4-star hotel in Wilsonville)

## WEAKNESSES

- Low tourism volume during shoulder season (October - May)
- Not recognized as a tourist destination
- Lack of: a) multi-purpose facility for recreational and entertainment activities, b) large meeting space, c) a downtown core d) businesses with local flavor
- Lack of lodging inventory and luxury/resort style lodging options
- Difficulty converting business travelers into repeat leisure travelers
- I-5 / I-205 traffic congestion
- Unrecognizable I-5 strip city
- No visitor center or central kiosk for visitor information

## OPPORTUNITIES

- Increase tourism during shoulder season and winter months
- Enhance recreational amenities (facilities, trails, parks, agri-tourism)
- Town Center redevelopment, Pedestrian Bridge project
- Proximity: agri-tourism, wine country, I-5 and light rail access, Portland and Portland International Airport (PDX), Salem, Willamette River, the Pacific Ocean, Mt. Hood, etc.

## THREATS

- Downturn in national economy and consumer confidence
- Increase in regional marketing from competitive destinations
- 21 hotels opening in the Portland metro area
- Multi-use center opening in Hillsboro

# HOW WE MEASURE SUCCESS

Vertigo Marketing uses several metrics to gauge the ebbs and flows of Wilsonville's tourism industry and to evaluate the effectiveness of the City's marketing efforts. When viewed cumulatively these metrics provide a reliable approximation of the health of the industry and the effectiveness of Vertigo's programs and services. **Listed below are the primary TOURISM METRICS Vertigo Marketing uses with a brief description of each.**

**TRANSIENT LODGING TAX (TLT)** TLT collections serve as the primary metric Wilsonville uses to measure the ebbs and flows of the its tourism industry. Due to the demand driven nature of lodging pricing (the higher the demand, the higher the lodging rates), TLT collections provide a **BLENDED METRIC** of rate and occupancy that effectively approximates the overall demand for a destination's lodging inventory.

**CITYWIDE LODGING OCCUPANCY** Citywide lodging occupancy is the percentage of available lodging units occupied for a defined period of time. Smith Travel Research (STR) occupancy data is the industry standard used by most lodging companies, including Vertigo Marketing. Along with TLT data, citywide occupancy data helps Vertigo gauge the ebbs and flows of the City's tourism industry.

**WEBSITE TRAFFIC TO EXPLOREWILSONVILLE.COM** Vertigos' marketing model is designed to drive potential visitors and leads to ExploreWilsonville.com where they are converted to customers for local businesses. As a result, the volume of visitors to the Explore Wilsonville website is a key metric used to evaluate interest in our destination and the effectiveness of our marketing.

**REFERRAL TRAFFIC FROM TOURISM WEBSITE TO STAKEHOLDER WEBSITES** ExploreWilsonville.com is designed to convert Vertigo's marketing efforts to revenue for local businesses. Therefore, the volume of website referrals sent from ExploreWilsonville.com to the websites of tourism stakeholders is a primary metric used to evaluate the effectiveness of Vertigo's marketing.

**LEAD GENERATION & LIST GROWTH** Direct marketing is key to driving awareness and visits to a destination. Vertigo is proposing several initiatives to start collecting "opt-in" email addresses, mobile phone numbers and mailing addresses for future marketing.

**SOCIAL MEDIA ENGAGEMENT** Vertigo will rebrand and launch social media channels for Explore Wilsonville in order to build awareness of the tourism assets found within and outside of the city. Multiple social media channels allow us to monitor what is being said about Wilsonville—good or bad—and engage with not only potential visitors, but writers, bloggers and media for public relations opportunities.

**SURVEY COLLECTION** Survey information can be collected via the website and questions/quizzes posted on Facebook.



# FY17/18 & FY18/19 PLAN

Vertigo Marketing is firmly focused on achieving the goals and objectives reflected on page 8. The following **9 KEY STRATEGIES** provide a summary of Vertigo's primary efforts that will be employed to achieve those objectives. Each of these strategies and tactics will be initiated in 2017 and will continue to be executed and enhanced through the conclusion of fiscal year 2018/2019.

## # 1: DESTINATION BRAND MARKETING

Establish a compelling tourism strategy and brand for Wilsonville. Advertising the Wilsonville tourism experience through mass media represents Vertigo's largest expenditure & a primary driver of traffic to ExploreWilsonville.com.

## # 2: CITYWIDE EVENTS, CONVENTIONS, AND CONFERENCES

Courting citywide events and groups is important to improve non-summer tourism & introduce new visitors to the destination. Increasing the length of stay with the business traveler is a priority.

## # 3: DIRECT MARKETING

Design a unique and engaging Visitor Guide for Wilsonville to fulfill website requests and distribute at various events and establishments. Create marketing messaging to specifically grow our opt-in database (lead generation), which will cultivate long-term customer relationships, awareness, and positive word-of-mouth. FY17-18 will focus on lead generation and list development. Consistent email marketing communications will begin in FY18/19.

## # 4: PUBLIC RELATIONS

Working with our regional DMO partners to host journalists is an effective way to market Wilsonville. Explore Wilsonville will also launch it's own PR strategy and initiative which includes strategy, research, pitching, press release writing, and wire distribution.

## # 5: WEBSITE AND DIGITAL MARKETING

The ExploreWilsonville.com website is the most important part of Vertigo's marketing mix. Ensuring Wilsonville tourism is supported by a robust and informative tourism website is Vertigo's most important job. Wilsonville's social media strategy, engagement, and search engine optimization (SEO), and search engine marketing (SEM) efforts extend and reinforce the Wilsonville campaign and brand.

## # 6: COMMUNITY PARTNERSHIPS

Establish marketing relationships with community partners and tourism stakeholders that will extend Wilsonville's marketing reach & validates the destination.



## # 7: TOURISM LEADERSHIP

Allocating time & resources to make the City an active participant in the community, region, and state enables Wilsonville to be a broader value to the community, and ensures Wilsonville's tourism industry is represented in important regional tourism conversations and planning.

## # 8: RESEARCH

Investing in research enables Vertigo to deliver on the commitment to be a data-driven organization. Additionally, the research is made available to the public—at no cost—to assist with business & economic development efforts.

## # 9: FINANCIAL MANAGEMENT

Vertigo is focused on achieving excellence in transparent financial management & stewardship of public funds. This is an ongoing & unwavering priority for the City of Wilsonville as well as Vertigo's partners.

**EXPLORE**  
WILSONVILLE.COM

A POCKET (OF FUN)



## Logo Usage

### Preferred Logo



### One Color Application



### Reversed - Four Color



### Reversed - One Color



## Sample Typography

### Design Element

### FARMLANDIA FARM LOOP

POCKET TRIP

Take a self-guided tour of 18 farms between Wilsonville & Portland. Catch a cooking class or aDinners in the Field event where you'll nosh on fresh local food & Oregon wine.

### Fonts Applied:

Phalanx Bold  
Hanley Sans  
Hanley Sans Inline

### Other Font Applications:

Skia

## Four Color Application



C/M/Y/K	C/M/Y/K	C/M/Y/K	C/M/Y/K
80/17/77/3	51/5/44/0	33/27/27/0	28/84/58/14

## HTML Color - Hex Triplet



Hex	Hex	Hex	Hex
#2c9966	#81c1a2	#afadad	#a44552

## Identity Do's and Don'ts

- To ensure that the logo maintains its legibility and integrity within any environment, it should be surrounded by an area that remains clear of distracting text or graphic elements.
- The entire logo must appear in the specified color(s), do not use different colors for each word.
- The logo is always to remain stacked.
- If used in a lineup, logos should always be used with a border. Do not deviate from the color standards set forth here.
- Do not stretch or skew the logo when resizing.
- Logos should always be scaled proportionately. The smallest a logo can be is 2" wide to maintain legibility. It can be scaled larger as appropriate for project piece.
- Use caution when using supportive statements or headlines in conjunction with the logo or supporting artwork on material. Allow for ample space around each element.

### Embroidery

- The stacked "Explore Wilsonville" logo must always be embroidered in the appropriate Robinson Anton Thread Colors unless the logo is being reproduced "tone-on-tone" (i.e. the same color as the apparel) or in One Color (i.e. black on white)
- If embroidering on a black or dark background, the text may be reversed to white.

## CLIENT: WILSONVILLE / CATEGORY: DESTINATION/TRAVEL

### BRAND ESSENCE

#### Wilsonville is...

Central.  
Natural.  
Pristine.  
Safe.

### UNIQUE SELLING PROPOSITION (USP) BENEFIT UNIQUE TO THE BRAND

- Affordable
- Family-friendly
- Walkable & bikeable
- Farm Fresh
- Nature & Culture-rich
- Minutes from downtown Portland
- Minutes from wine country
- Minutes from nature, historical landmarks, parks & a river
- Minutes from premier shopping
- Minutes from family-friendly attractions

### tone of voice

Fun-loving, enlightening, and exuberant

### IMAGERY AND VISUALS

Unique, playful graphics and photography

Emphasize central location -- communicate where Wilsonville is and how accessible we are  
Excursions within the City and out (refer to Geography map on PAGE 21)

## WHAT DO WE WANT PEOPLE TO THINK OR FEEL AFTER EXPERIENCING THE ADVERTISING?

Curious / Informed / Captivated

## TARGET AUDIENCE & PERSONALITY

Adapt to the travel desires and emerging trends of millennials, young families, dynamic empty-nesters and urban singles. The audience is “experience-hungry travelers”; they are active explorers seeking authentic experiences and one-of-a-kind memories for themselves and their families.

They want to spend more time in nature and green spaces whether splashing in a river, hiking along a trail, or golfing on a green. They want to bike through wine and farm country tasting fresh food and sipping wine along the way. They want to hunt for bargains at the Woodburn Outlets or stroll by some of Oregon's best stores at Bridgeport Village. Summers will inspire family time with putt-putt golf, a ride on a zipline, picnics in a park, outdoor movies, live music, and hot days spent running through a sprayground. Fall and winter days are best spent inside exploring a museum built for speed, battling it out in an interactive 3D movie experience, or opting for an old school game of Pac-Man at the Family Fun Center.

For them, travel is an act of curiosity and inspiration, time to reconnect and disconnect all at the same time, commune with nature and delight in the explorer’s mindset.

## MEDIA & EXECUTIONAL CONSIDERATIONS

Website, Print, Paid and Organic Social Media, Digital Marketing, Search engine optimization (SEO)/Search engine marketing (SEM), Email Marketing, and Visitor Guide

## GEOTARGET MARKETS

Oregon I-5 Corridor  
Bend  
Seattle/Tacoma

## COMPETITION

Greater Portland Metro Area  
Willamette Valley wine country communities  
Oregon Coast

# CREATIVE BRIEF/CAMPAIGN STRATEGY

## WILSONVILLE ASSETS

Family Fun Center  
World of Speed Museum  
Golf  
Cycling  
Wineries  
Breweries  
Farmlandia Farm Loop  
Farmers Market  
Willamette River (boat, kayak, canoe)  
Shopping (Outlets & Bridgeport)  
Public Art Tour (bike or walk)  
Parks & Nature Trails  
Equestrian Events & Trails  
Sports Tournaments  
Water Features (splash park)  
Light Rail Access into Portland  
Champoeg State Park  
Walt Morey Park  
McMenamins Old Church & Pub  
Korean War Memorial  
International Dining  
Ice Age Tonquin Trail  
Off-Leash Dog Park  
Skate Park

Historic Butteville General Store  
Pioneer Cemeteries  
SMART Trolley Tours  
Aurora  
Antique Powerland Museum  
Swan Island Dahlias  
Wilsonville Festival of the Arts  
Wilsonville Brewfest  
Fun in the Park  
St. Paul Rodeo  
Aurora Colony Day  
Movies in the Park  
The Country Classic  
Wilsonville Rotary Concerts  
Clackamas County Fair & Rodeo  
Woodburn Tulip Festival  
Mud, Sweat & Beers Brewfest & Run (Woodburn)  
Tulip Trail Run (Woodburn)  
Dinners in the Field  
Friench Prairie Farm Fest  
Strawberry Social  
Kiwanis Kids Fun Run  
Thanksgiving in Wine Country Festival

## THE CHALLENGE

How do you distinguish Wilsonville from the other Portland Metro suburb cities like Tigard or Tualatin?  
To most, Wilsonville is one of those unrecognizable I-5 freeway strip cities that sits between Portland and Salem.

## THE BIG QUESTION

How do you define a tiny city that's tucked between one of the country's coolest cities and one of the top wine regions in the world?



## **CAMPAIGN CONCEPT**

Pocket Trips

## **CAMPAIGN TAGLINE**

A POCKET (OF FUN)

## **AD COPY SAMPLE**

In 19-miles you could be ... feasting.

Every March, gastronomers flock to feast during Portland's Dining Month where three-course meals are a mere \$29. Settle in our pocket city for the weekend and save a bundle on lodging compared to Portland hotels. Visiting is easy & parking is free.

ExploreWilsonville.com.

## **POCKET TRIP SAMPLES**

### **MID-CENTURY MEETINGS**

Book a different kind of meeting space in Wilsonville. A mid-century mod lounge and bar area is a refreshing surprise just upstairs from a world-class museum surrounded by things that go VROOM!

### **FARMLANDIA FARM LOOP**

Take a self-guided tour of 18 farms between Wilsonville & Portland. Catch a cooking class at Middleground Farms or sign up for an upcoming Dinners in the Field where you nosh on fresh seasonal food & Oregon wine.

### **WILLAMETTE VALLEY WINE COUNTRY**

Escape to 300+ wineries in an award-winning wine region. Within 5-miles of Wilsonville you can simply sip or go grape stomping at a working winery.

# CAMPAIGN STRATEGY

## **WHY THIS WORKS**

Wilsonville has plenty of unique stories to tell - this is what the experience hungry traveler wants.

Not your ordinary visuals and a “pocket visitor guide” highlights why Wilsonville will be a preferred destination for eco-travelers, families, sports teams, meetings & business travel.

We will leverage highly searched vacation locales (like Portland or Willamette Valley) to gain exposure for Wilsonville on the web with our pocket trip articles.



**WILSONVILLE**  
**OREGON**



tanager  
photography



# APPENDIX A – MOOD BOARD





# APPENDIX B – AD SAMPLES

**FARMLANDIA FARM LOOP**

# POCKET TRIP



Take a self-guided tour of 18 farms between Wilsonville & Portland. Catch a cooking class or a Dinners in the Field event where you'll nosh on fresh local food & Oregon wine.

**EXPLORE WILSONVILLE** MOJO

A POCKET (OF FUN)










Sample Print Ad #1

world of speed motorsport museum | a pocket trip

Oregon's newest and coolest experience for all ages. Get behind the wheel and feel like you're racing a NASCAR, Formula or Indy car!

[EXPLOREWILSONVILLE.COM](http://EXPLOREWILSONVILLE.COM)



<p>world of speed motorsport museum   a pocket trip</p> <p>Oregon's newest and coolest experience for all ages. Get behind the wheel and feel like you're racing a NASCAR, Formula or Indy car!</p> <p><a href="http://EXPLOREWILSONVILLE.COM">EXPLOREWILSONVILLE.COM</a></p>	<p>oregon city municipal elevator</p> <p>oregon city municipal elevator</p> <p>First built in the top of the regional historic landmark, Oregon City Municipal Elevator offers panoramic views of the Willamette River and Wilsonville Falls.</p> <p>Oregon City, OR <a href="http://www.oregoncity.org">www.oregoncity.org</a></p>	<p>wooden shoe tulip farm</p> <p>Join us in April for acres of stunning beauty, summer sunsets &amp; beautiful views, and October for Sunday Fun.</p> <p>Clatsop, OR 503-712-0005 • <a href="http://www.woodenshoefarm.com">www.woodenshoefarm.com</a></p>
		
<p>oregon's mt. hood territory</p> <h2>100 ways to play</h2> <p><a href="http://mthoodterritory.com">mthoodterritory.com</a></p> 		
<p>end of the oregon trail interpretive center</p> <p>It was here that the "Trail of Oregon" National Blue, green, white, and yellow line progressive along Oregon Trail Parkway in the heart of Astoria, and across the Astoria area.</p> <p>Oregon City, OR 503-437-9128 • <a href="http://www.endoftheoregontrail.org">www.endoftheoregontrail.org</a></p>	<p>rodeo walk of fame</p> <p>Legends of the "Rodeo" of Oregon, many of which worked the great fields of Malheur and competed in World Famous Buckaroo, winner &amp; food in Oregon.</p> <p>Malheur, OR 503-423-4348 • <a href="http://www.rodeowalkof.com">www.rodeowalkof.com</a></p>	<p>mt. hood cultural center &amp; museum</p> <p>The Second Pioneer to Government Camp, Official World Ski Museum, Historic Local Art Exhibit, Gift Shop, Climb Snowy Drop Ski Lift, and more to see.</p> <p>Government Camp, OR 503-429-4229 • <a href="http://www.mthoodcultural.org">www.mthoodcultural.org</a></p>
		

Sample Travel Oregon + Mt. Hood Territory Co-op Ad

# APPENDIX C – AD CAMPAIGN MEDIA BUY CONSIDERATIONS

PUBLICATION	ISSUE/TIMING	2018/2019	SIZE
Travel Oregon	annual - due 1/26/18	●	1/3
Travel Portland	annual - due mid Feb.	●	1/3
Portland Monthly	October - due 8/17/18	●	1/3
AAA Magazine (VIA)	July/Aug - due 5/8/18	●	1/3
AAA Magazine (VIA)	Nov/Dec - due 9/10/18	●	1/3
<b>Digital Media</b> (Google Adwords, Facebook, Instagram, Pinterest, Travel Oregon, etc.)	digital	●	
<b>Co-ops with Regional Partners</b> (Mt. Hood/Travel Portland - due 2/12/18: \$200, Travel Oregon - due 1/5/18: \$300)	Varies	●	Varies

REFER TO FINAL SCOPE OF WORK DOCUMENT FOR MORE DETAILS & FINAL MARKETING PLAN





## VERTIGO MARKETING

63372 FREEDOM PLACE BEND, OR 97701

541.979.0094 | [VERTIGOMARKETING.COM](http://VERTIGOMARKETING.COM)

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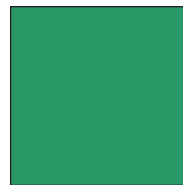
These materials contain unlicensed images and are meant for internal reference only. Vertigo Marketing has not obtained any rights from photographers or models depicted herein.

# Campaign Mark & Pocket

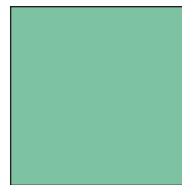
**EXPLORE**  
WILSONVILLE.COM  
A POCKET (OF FUN)



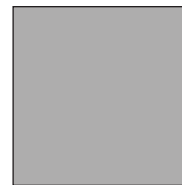
FONTS:  
Phalanx by Mark Richardson Bold  
Hanley- Sans (Sans)  
Skia



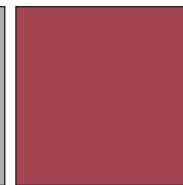
#2c9966  
80-17-77-3



#81c1a2  
51-5-44-0



#afadad  
33-27-27-0



#a44552  
28-84-58-14

# Sample Print Ad



**FARMLANDIA FARM LOOP**

# POCKET TRIP

Take a self-guided tour of **18 farms** between **Wilsonville & Portland**. Catch a cooking class or a Dinners in the Field event where you'll nosh on fresh local food & Oregon wine.

**EXPLORE WILSONVILLE**<sup>OR</sup>  
A POCKET (OF FUN)





# Vertigo

M A R K E T I N G

**SCOPE OF WORK  
CITY OF WILSONVILLE 2018/2019 ADVERTISING &  
MARKETING SERVICES  
THROUGH JUNE 30, 2019**

## **GLOSSARY OF TERMS**

### **(CDN) Content Delivery Network**

A content delivery network or content distribution network is a geographically distributed network of proxy servers and their data centers.

### **Email “Blast”**

Email marketing is the act of sending a commercial message, typically to a group of people, using email. In its broadest sense, every email sent to a potential or current customer could be considered email marketing

### **Hackalert**

HackAlert is a cloud-based service that identifies hidden zero-day malware and drive-by downloads in websites and online advertisements. Its greatest strength lies in its early-warning function- it sends out an immediate warning to the website owner, before search engines blacklist the website.

### **Hosting**

The activity or business of providing storage space and access for websites.

### **(KPI) Key Performance Indicator**

A Key Performance Indicator is a measurable value that demonstrates how effectively a company is achieving key business objectives.

### **Maintenance**

Performing all the tasks necessary to keep a website up to date and in good, working order so that it works and shows up correctly with the latest web browsers and mobile devices.

### **(ODMO) Oregon Destination Marketing Organization**

### **Plug-ins**

Plug-ins are apps that allow you to add new features and functionality to your website. Exactly the same way as apps do for your smartphone.

### **(SEO) Search Engine Optimization**

The process of maximizing the number of visitors to a particular website by ensuring that the site appears high on the list of results returned by a search engine.

### **Social Media**

Websites and applications that enable users to create and share content or to participate in social networking.

### **SSL Certificate**

SSL Certificates are small data files that digitally bind a cryptographic key to an organization's details. When installed on a web server, it activates the padlock and the https protocol and allows secure connections from a web server to a browser.

### **(VIC) Visitor Information Center**

A physical location that provides tourist information to the visitors who tour the place or area locally.

Final costs are based on approved client budget and treated as “do not exceed”. Per contract, line items for the following goods and services can be reallocated to cover unanticipated needs upon mutual agreement between Vertigo Marketing and the City of Wilsonville and may be reallocated at the direction of the Public/Government Affairs Director.

## SECTION ONE

**Deliverables that require retainer-fee services provided by Vertigo or subcontractors.**

### **A. WEBSITE RETAINER SERVICES: \$19,000**

**A. To include the following services and deliverables:**

- **Hosting & Maintenance:** hosting with CDN
- **SSL Certificate Renewal**
- **Security/Hackalert Scanning**
- **Paid Plug-ins**
- **Content Creation**
- **Campaign Landing Page Development**
- **Ongoing Updates for Listings**
- **Event Calendar Updates**
- **Design & Development**
- **SEO + Ranking Software Subscription**
- **Adding Graphics/Photos/Videos**
- **Reporting:** Quarterly KPI report

**B. Team Members assigned to this Task:**

- Lynnette

**C. Completion date:** Throughout 2018/19

### **B. WEBSITE REDESIGN: \$15,000**

**A. To include the following services and deliverables:**

- **Custom Development for Plugins**
- **Enhanced Event Calendar**
- **Directory Listings**
- **Graphics/Design enhancements to match the new brand**

**B. Team Members assigned to this Task:**

- Lynnette

**C. Completion date:** Spring 2018

### **C. DISTRIBUTION: \$4,401**

**A. To include the following services and deliverables:**

- **Distribution of Visitor Guide to Willamette Valley Regional DMO’s (34):** Local City and County Chambers of Commerce, Convention & Visitors Bureaus, Visitor Information Centers (VIC’s)
- **Distribution of Visitor Guide to Greater Portland State Welcome Centers (24):** Local City and County Chambers of Commerce, Convention & Visitors Bureaus, VIC’s
- **Distribution of Visitor Guide to Mt. Hood/Columbia River Gorge Regional DMO’s (11):** Local City and County Chambers of Commerce, Convention & Visitors Bureaus, VIC’s

- **Travel Portland (2):** VIC in Pioneer Courthouse Square and the Oregon Convention Center
- **Distribution Services:** Storage, Management, Count, Bundle, Box, Label, Shipping and Delivery

**B. Team Members assigned to this Task:**

- Trev

**C. Completion date:** Spring 2018

**D. DESIGN SERVICES:**

**\$16,680**

**A. To include the following services and deliverables:**

- **Pocket Trips Visitor Guide:** (1) folio / rack card, (12) pocket cards
- **Print Ad Design:** Creative services for print advertising campaigns
- **Digital Ad Design & Development:** Creative services for digital advertising campaigns
- **Copy writing:** Develop copy for marketing collateral, print and digital advertising
- **Media Buying:** Identify advertising opportunities with various publications, negotiate favorable ad rates, identify insertion dates based on editorial calendar, define ad specs, upload ads
- **Art & Creative Direction:** Develop creative that aligns and enhances current marketing efforts
- **Photography Selections:** Online search for desirable photography that reflects the image being developed for Wilsonville, locate and communicate with photographer, negotiate rates, usage, archival of imagery, contracts and licensing
- **Production:** Non-creative production services

**B. Team Members assigned to this Task:**

- Lynnette, Trev

**C. Completion date:** Throughout 2018/19

**E. SOCIAL MEDIA RETAINER SERVICES:**

**\$36,000**

**A. To include the following services and deliverables:**

- **Social Media Strategy:** Create master editorial calendar, develop and align SEO social strategies to assist with SEO efforts for the website, identify trending hashtags, review and analyze to improve the campaign performance.
- **Management & Implementation:** Manage day-to-day social media posting and community management, copywriting, graphic design, art direction of photography, schedule posts, seek out missing photography, ongoing coordination and communication with event producers and businesses for events and happenings
- **Monitoring**
- **Reporting:** Quarterly KPI report
- **Establish Channels:** TW @SeeWilsonville, YouTube ExploreWilsonville
- **Customize Channels**
- **Post 2x per week**
- **Paid Social Media ads with deep targeting**
- **Social media contest promotion for lead generation**

**B. Team Members assigned to this Task:**

- Lynnette, Trev, sub-contractor TBD and approved per Clty regulations

**C. Completion date:** Throughout 2018/19

**F. PR RETAINER SERVICES:**

**\$15,000**

**A. To include the following services and deliverables:**

- **Press Release Writing:** (4 releases with regional wire AP distribution)

- **Meltwater Software Subscription:**
  - Full Monitoring Suite
  - Premium Social Coverage (Facebook, Twitter, Instagram, YouTube, 23 million blogs)
  - Analytics & Dashboards
  - Full Media Contact Database with unlimited press distribution
    - **NOTE:** Meltwater is the global leader in online media intelligence. Their product suite allows us to monitor, distribute, publicize and analyze business critical information posted online, in both mainstream media and social media, as well as build media contact lists to assist with press outreach
- **Pitching Story Ideas**
- **Responding to Writers with Content & Photos**
- **Set Up and Manage Meltwater Software**
- **List Building**
- **Monitoring**
- **Reporting:** Quarterly KPI report
- **Research/Interviews**
- B. Team Members assigned to this Task:**
  - Lynnette, sub-contractor TBD and approved per City regulations
- C. Completion date:** Throughout 2018/19

## **G. PHOTO & VIDEO:**

**\$15,000**

### **A. May include the following services and deliverables:**

- New photography and videography rights for print and digital usage
- Custom photo/video shoots at various “pocket trip” locations throughout the seasons
- Event photography
- Scouting
- Creative Direction
- Shotlist
- Storyboard
- Models/Talent/Props
- Filming
- Editing
- Travel
- Production

### **B. Team Members assigned to this Task:**

- Lynnette, Trev, sub-contractors TBD and approved per City regulations

### **C. Completion date:** Throughout 2018/19

## **H. EMAIL MARKETING SERVICES FY18/19:**

**\$3,000**

### **A. To include the following services and deliverables:**

- Email Blasts (6)
- Template Design & Development
- Content Creation/Copywriting
- List Management
- Production
- **Reporting:** Quarterly KPI report



**B. Team Members assigned to this Task:**

- Lynnette

**C. Completion date:** FY2018/2019

**I. FINANCIAL:**

**\$6,490**

**A. To include the following services and deliverables:**

- Accounting
- Quarterly Reports
- Membership Management: ODMO, ISSUU, Travel Portland
- Software Subscriptions Management & Implementation: STR

**B. Team Members assigned to this Task:**

- Lynnette, Trev

**C. Completion date:** Throughout 2018/19

**SUBTOTAL SECTION ONE:**

**\$130,571**

**SECTION TWO**

**Media buys, sub-contractor services, memberships & subscriptions, printing, postage, and distribution services that will be invoiced directly from vendors that are in effect pass-through expenses.**

**J. RESERVE/CONTINGENCY:**

**\$7,500**

**K. PRINT MEDIA BUYS\*:**

**\$20,090**

1. Travel Oregon - 2018	2,100,000 impressions	\$3,900
2. Travel Portland - 2018	1,155,000 impressions	\$4,500
3. Portland Monthly - Oct: Long Weekends & Wine Guide	492,075 impressions	\$2,000
4. AAA (VIA) - July/Aug: Willamette River	1,058,000 impressions	\$3,720
5. AAA (VIA) - Nov/Dec: Insiders Guide to Portland	1,058,000 impressions	\$3,720
6. Co-ops with regional partners	impressions TBD	\$2,250

*\*Impression data comes from media kits provided by each publication or other documents*

**L. PAID DIGITAL MEDIA BUYS:**

**\$13,500**

1. Facebook/Instagram	impressions TBD
2. Google Adwords	impressions TBD
3. Misc. digital (Travel Oregon, etc.)	impressions TBD

**M. CURRENT WEBSITE SERVICES:**

**\$6,000**

**A. To include the following services and deliverables:**

- Hosting & Maintenance: (provided by MediaPhysics through June 2018)
- Event Calendar

**B. Team Members assigned to this Task:**

- Lynnette, MediaPhysics (approved service provider for City of Wilsonville)

**C. Completion date:** Current contract with MediaPhysics expires June 30, 2018

**N. FINANCIAL:** **\$3,505**

**A. To include the following services and deliverables:**

- **Memberships:** ODMO \$500, Travel Portland \$585
- **Software subscriptions:** STR \$2000, ISSUU \$420

**B. Team Members assigned to this Task:**

- Lynnette, Trev

**C. Completion date:** Throughout 2018/19

**O. POCKET TRIPS VISITOR GUIDE:** **\$17,320**

**A. To include the following services and deliverables:**

- **Pocket Adventures - Folio / Rack Card:** 23.5" x 9" (flat) sheet printed on 65# Cougar Opaque Smooth Cover. Printed in four (process) colors on both sides of sheet (4/4), full bleed. Die cut per-diagram - contains, 4 (four) 3.25" slits with relief holes. 4 (four) glue strips to create two pockets on far left and right panels. 6 (six) scores with a .25" capacity score in center. Folded to create 2 pockets and packaged as a flat piece.

**Quantity:** 15,000

- **Pocket Cards:** 12 (twelve) different 3" x 4" cards printed on 111# Dull Cover. Printed in four (process) colors on both sides of sheet (4/4), full bleed. Trimmed and boxed.  
**Quantity:** 15,000 (180,000 cards)
- **Assembly:** Collate 12 cards into 4 sets of 3. Hand insert each set into slit on pocket folder. Hand fold folio shut to finish size of 4" x 9". Box.
- **Postage:** Reserve 1,000 finished pieces to be made available per request for mailing. Current 3 ounce rate is \$0.91 per piece via First Class stamp. Mailing services (stuffing, addressing and stamping envelope) to be provided by City Staff.
- **#10 Envelopes:** 1,000 #10 Regular 24 lb. bright white envelopes with logo and/or return address printed on front.

**B. Team Members assigned to this Task:**

- Trev, print sub-contractor TBD and approved per City regulations, City Staff

**C. Completion date:** Spring 2018

**P. DISTRIBUTION:** **\$1,214**

**A. To include the following services and deliverables:**

- **Certified Folder: Corporate/Industrial program** (10 sites throughout Aloha, Beaverton, Clackamas, Hillsboro, Lake Oswego, Portland), **Portland International Airport, Oregon City State Welcome Center**

**B. Team Members assigned to this Task:**

- Trev, Certified Folder to be approved per City regulations

**C. Completion date:** Spring 2018

**SUBTOTAL SECTION TWO:** **\$69,129**

**TOTAL BUDGET FY18/19 (ONE + TWO):** **\$199,700**

Destination Analysts, Inc.  
December 4, 2017

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# RESEARCH PROPOSAL

VERTIGO MARKETING

WILSONVILLE, OREGON VISITOR PROFILE STUDY

## OVERVIEW & OBJECTIVES

This research proposal outlines Destination Analysts' recommended methodology and overall approach to conduct a Visitor Profile Study on behalf of Vertigo Marketing and Wilsonville, Oregon in order to develop a comprehensive understanding of visitors and potential visitors to the City of Wilsonville, as well as garner insights about the Wilsonville brand and ultimately generate incremental visitation—and thus positive economic impact—to the city.

As the destination has an opportunity to continue growing tourism through effective marketing, research can provide critical insights into the most efficient means of achieving this. Understanding Wilsonville, its visitors, and traveler sentiment about the destination is key to effective communication and, in the end, moving the needle. This proposal illustrates our approach to conducting research on behalf of Wilsonville that will serve as a guide to Vertigo Marketing and the City of Wilsonville's overall tourism marketing strategy.

Destination Analysts recommends conducting the following primary research projects:

- Visitor Intercept Survey
- Online Survey of Visitors
- Website User Survey

The overall approach, methodologies, timeline, deliverables and costs for these research projects are detailed following.

## VISITOR INTERCEPT SURVEY

### OVERVIEW & METHODOLOGY

Destination Analysts recommends conducting a Visitor Intercept Survey at locations throughout Wilsonville. This survey will target visitors who live outside Wilsonville, including hotel guests, home rental visitors (those who stay overnight in home rentals or peer-to-peer lodging booked through AirBnB, VRBO, etc.), visiting friends and relatives (VFRs) who stay in private residences, and day-trip visitors. Working closely with Vertigo Marketing and the City of Wilsonville, Destination Analysts will develop the survey questionnaire, which will address topics such as:

- Visitor point of origin
- Travel party composition
- Length of stay
- Activities and attractions visited in-market
- Detailed in-market spending
- Inspiration/motivations for visiting Wilsonville
- Visitor perceptions of Wilsonville
- Satisfaction with the visitor experience



- Likelihood to return
- Visitor attitudes, behaviors and interests
- Visitor psychographic
- Visitor demographics
- Trip planning resources utilized
- Other topics of interest to Vertigo Marketing and the City of Wilsonville

Destination Analysts will aid Vertigo Marketing and the City of Wilsonville in securing permission for Destination Analysts staff to survey at visitor attractions, hotels, places and events—both public and private. Destination Analysts, Vertigo Marketing and the City of Wilsonville will work closely together to determine the survey locations as well as the best dates and times to survey at these visitor attractions.

Destination Analysts staff will manage a team of surveyors to conduct these in-person surveys at mutually agreed upon scheduled times. Surveyors will wear a Wilsonville branded shirt and identification badge. They will approach visitors at random and ask them if they would be willing to help the City of Wilsonville by answering some questions about their visit. Survey responses will be input into an iPad by the surveyor (although the visitor will input their own responses to the demographic questions).



*A Destination Analysts field researcher surveying a visitor to West Hollywood, California.*

To account for seasonality, we recommend collecting at least 200 surveys during two research waves: 200 surveys in Winter FY18/19 and 200 surveys in Summer FY18/19, for a minimum total sample size of 400 surveys.

We recommend Vertigo Marketing and the City of Wilsonville provide a small branded item (or similar) as an incentive to visitors to take the survey.

## **PROJECT DELIVERABLES**

Vertigo Marketing and the City of Wilsonville will receive the following deliverables for the Visitor Intercept Study:

- Interim report of findings after Wave 1 (Winter FY18/19)
- Comprehensive final Wilsonville Visitor Profile report, including graphical representations, written analysis, an Infographic Summary and an Executive Summary
- Online presentation of final findings via web conference

## PROJECT TIMELINE

The project can typically be launched within four weeks of commencement, depending on how much time is needed by Vertigo Marketing and the City of Wilsonville to provide feedback on the survey questionnaire and/or permission for survey staff to be on-site.

The interim report after Wave 1 will be delivered 4-6 weeks after data collection is completed.

The final report of findings will be delivered 4-6 weeks after the Wave 2 data collection is completed.

The online presentation of findings will be scheduled at Vertigo Marketing and the City of Wilsonville's convenience.

## ONLINE SURVEY OF VISITORS

### RECOMMENDED APPROACH & METHODOLOGY

Destination Analysts can conduct an Online Survey of Visitors as a separate project from the Visitor Intercept Survey; however the data from which will be used to add to and supplement the overall visitor data set provided by the intercept survey. The survey questionnaire will be nearly identical to that of the Visitor Intercept Survey, yet adapted for online administration. Vertigo Marketing and the City of Wilsonville will speak with local hotels, inns & B&Bs, local businesses, attractions and organizations to obtain their consumer email lists. Destination Analysts will then send an email invitation on behalf of (and branded by) the City of Wilsonville requesting participation in a brief yet important survey. In order to send the email invitation, Destination Analysts will need a hi-res logo, hi-res destination image and official email address (e.g., [research@wilsonvillechamber.com](mailto:research@wilsonvillechamber.com)) that automatically forwards to [research@destinationanalysts.com](mailto:research@destinationanalysts.com).



Greetings,

On behalf of San Francisco Travel thank you for visiting our website, SanFrancisco.Travel.

To ensure that our website is best serving travelers like you, we'd like to ask for your help with a [brief travel questionnaire](#). When you recently came to our website you indicated that you would be willing to participate in this effort.

*Above: Screenshot of a survey email invitation for San Francisco Travel.*

## PROJECT DELIVERABLES

Vertigo Marketing and the City of Wilsonville will receive the following deliverables for the Online Visitor Survey:

- Comprehensive report of findings, including graphical representations, written analysis, an Infographic Summary and an Executive Summary
- Profiles of Wilsonville Visitors and Potential Visitors
- Online presentation of final findings via web conference

## PROJECT TIMELINE

The Online Visitor Survey can be completed in approximately 8-12 weeks from start to finish. The final report of findings will be delivered 4-6 weeks after data collection has closed.

## WEBSITE USER SURVEY

### RECOMMENDED APPROACH & METHODOLOGY

Destination Analysts can also conduct a Website User Survey as a separate project from the Visitor Intercept Survey; however the data from which will be used to add to and supplement the overall visitor data set provided by the intercept survey. A brief online survey can be placed on the Wilsonville website (e.g., WilsonvilleChamber.com) which will ask website users the following key pieces of information:

- Anticipated month of arrival in Wilsonville
- Opt-in for a follow-up survey after their intended month of arrival in Wilsonville

An email inviting these users to take a survey will be sent after their anticipated month of visit to Wilsonville. The survey will identify whether the website user did indeed visit Wilsonville. If they did, visitors will be asked questions similar to those in the Visitor Intercept Survey and Online Survey of Visitors. If website users did not visit Wilsonville, the survey will probe for reasons why.

Like the Online Survey of Visitors, the email invitation to the follow-up survey will be on behalf of (and branded by) the City of Wilsonville.

### PROJECT DELIVERABLES

Vertigo Marketing and the City of Wilsonville will receive the following deliverables for the Website User Survey:

- Comprehensive report of findings, including graphical representations, written analysis, an Infographic Summary and an Executive Summary
- Profiles of Wilsonville Visitors and Potential Visitors
- Online presentation of final findings via web conference

### PROJECT TIMELINE

To account for seasonality, Destination Analysts recommends conducting this survey across 12 months, with the email invitation sent monthly. The final report of findings will be delivered 4-6 weeks after data collection has closed.



## PROJECT COSTS

Destination Analysts estimates the following costs to conduct a Wilsonville Visitor Profile Study. These costs are based on the recommended methodologies and sampling plans described earlier. The projects are priced individually in the event that Vertigo Marketing and the City of Wilsonville wishes to conduct only one or two of these research studies.

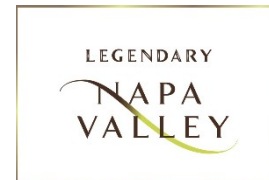
PROJECT	COST
Visitor Intercept Survey (200 per research wave, N=400 completed surveys)	\$56,800
Visitor Intercept Survey (300 per research wave, N=600 completed surveys)	\$66,100
Online Visitor Survey (local business consumer lists/outreach)	\$18,500
Website User Survey	\$21,200

The Visitor Intercept Survey will be billed in equal payments per research wave. To cover initial survey development work, Destination Analysts would invoice Vertigo Marketing and the City of Wilsonville for half of the Online Visitor Survey and Website User Survey project cost at the commencement of the project, and the remainder upon delivery of the report.

## CASE STUDIES

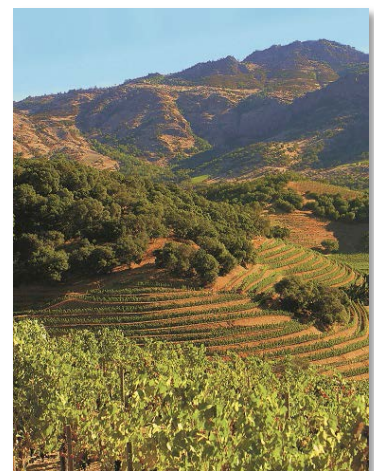
The following are case studies which demonstrate Destination Analysts' capabilities in conducting visitor research on behalf of travel and tourism industry clients. These research studies are similar in scope to the Visitor Profile Study proposed for Vertigo Marketing and the City of Woodinville and used a visitor intercept survey methodology to collect data.

### VISIT NAPA VALLEY VISITOR PROFILE & TOURISM ECONOMIC IMPACT STUDY



**Situation:** The Napa Valley is a destination known for exquisite wine and beautiful scenery. Because of this reputation, in past years Napa Valley enjoyed the benefit of steady tourism rates, but had not conducted comprehensive visitor research to better focus its marketing efforts and understand how much visitation had actually grown and the economic impact of that growth on the county. As Visit Napa Valley had conducted little research into the destination's visitors, they did not have actionable intelligence to work with in developing their advertising and marketing strategies. Their first step was hiring Destination Analysts to gain a better picture of who current visitors are and why they visit— information that was then used to develop and empower these strategies and assist stakeholders. Destination Analysts conducted a major study of Napa Valley visitors and developed a comprehensive research-based visitor profile. As part of this process, Destination Analysts also assessed the economic impact of tourism on the county as a whole.

**Solution:** Destination Analysts implemented a research plan for this project which included four components. First, a self-administered survey of lodging guests was conducted at numerous lodging properties to determine the types of visitors that came to Napa Valley and stayed in paid lodging accommodations. Second, a visitor intercept survey was conducted on a random sample of visitors at several Napa Valley locations and attractions to understand more about visitors who did not stay in paid lodging, such as visiting friends and relatives (VFR's) or day-trippers. Third, a supplemental telephone survey of Napa Valley homes was administered to quantify the number of VFR's who stayed overnight in a private home. Fourth, surveys of meeting planners and local area hoteliers were conducted to develop estimates of expenditures



made to plan events in the area.

**Results:** Destination Analysts developed a comprehensive visitor profile, reflective of all visitors to the Napa Valley area that Visit Napa Valley has used to better understand their visitors and thus gain more strategic marketing insights. Utilizing our Destination Economic Impact Model, Visit Napa Valley has been able to estimate visitor spending and volume in detail. With these two assets, Visit Napa Valley can more effectively position itself to travelers and communicate the value of tourism to the local community.

One of the primary takeaways of this research was that the largest visitor segment to Napa Valley is day-trip visitors, which helped inform Visit Napa Valley's marketing strategy to regional residents as well as tourists in nearby cities, such as San Francisco. Visit Napa Valley also gained insight regarding opinions on advanced reservations at wineries, as well as the likelihood to purchase wine or join a club. These findings were provided to Napa Valley's winery partners to provide them with intelligence for their sales and marketing techniques.

**Report:** Links to Visit Napa Valley's 2012, 2014 and 2016 Visitor Profile, Economic Impact and Quick Facts reports can be downloaded online here:

<https://www.visitnapavalley.com/about-us/research/>

## VISIT SANTA BARBARA VISITOR PROFILE & TOURISM ECONOMIC IMPACT STUDY



**Situation:** Santa Barbara is a destination rich with resources and scenic beauty that attracts travelers of all types, from leisure to business meetings. Nevertheless, Santa Barbara's tourism industry faces fierce competition from other California destinations. Visit Santa Barbara's previous research partners provided county-wide visitor profiles and economic impact estimates to Visit Santa Barbara. With the creation of a new business improvement district, however, Visit Santa Barbara needed a more developed research approach that could evaluate tourism activity and more effectively measure visitor growth and impact. Visit Santa Barbara retained Destination Analysts to conduct a study of Santa Barbara's visitors and develop an effective research-based visitor profile which could be used to position the destination most effectively. Other key objectives Visit Santa Barbara sought Destination Analysts to address included: tracking visitor sentiment about the Santa Barbara visitor experience and the Santa Barbara destination brand; and estimating the economic impact of tourism to the Santa Barbara Coast area.

**Solution:** Destination Analysts implemented a research plan for this project which included four components. First, a survey of hotel guests was conducted at numerous lodging properties to get a basic picture of the types of visitors that come to Santa Barbara and stay in paid lodging.

Second, a series of in-person interviews were conducted on a random sample of visitors at multiple Santa Barbara locations to supplement the sample as well as understand more about visitors who did not stay in paid lodging, such as visiting friends and

relatives (VFR's) or day-trippers. Third, a supplemental survey of Santa Barbara homes was administered to quantify the number of VFR's who stayed overnight in a private home. Fourth, surveys of meeting planners and local area hoteliers were conducted to develop estimates of expenditures made to plan events in the city.



**Results:** Visit Santa Barbara now has a clear picture of the demographic, psychographic and tripographic profiles of its valued visitors. This comprehensive visitor profile was reflective of all visitors to the Santa Barbara area, and was used to determine who visitors are and why they travel to Santa Barbara. The organization also has a detailed economic impact study useful for benchmarking and illustrating the industry's performance. These economic insights helped the organization continue to generate community and political support in the region.

**Report:** The Final Report of Findings, as well as Key findings from Visit Santa Barbara's 2012-2013 Santa Barbara South Coast Visitor Profile and Tourism Economic Impact Study can be downloaded online via these links:

<http://santabarbaraca.com/content/uploads/2016/02/Visit-Santa-Barbara-Visitor-Profile-Research-Final-Report.pdf>

<http://santabarbaraca.com/content/uploads/2016/02/2014-Travel-Outlook-DA-Presentation-David-Bratton.pdf>

**Situation:** As the organization in charge of marketing San Francisco as a global destination for leisure, business, groups and conventions, the San Francisco Travel Association has the responsibility of maintaining the city's foothold as a top destination market. The city remains in an ever increasingly competitive environment and works to maintain its position as one of the top destinations in the U.S., while also strengthening its appeal on a global scale. The city constantly faces major competition among other leading U.S. destinations, but knows the importance of expanding and evolving the San Francisco brand through the continual use of marketing intelligence. San Francisco Travel Association wished to gather detailed information on visitor spending, trip characteristics, use of travel planning resources, activities and attractions visited, evaluation of San Francisco brand attributes, visitor expectations and satisfaction and visitor psychographic and demographic profiling. Furthermore, the organization wanted to quantify visitor volume to the city, taxes generated by the tourism industry for the city San Francisco, and jobs supported by the tourism industry.

**Solution:** Destination Analysts implemented a research plan for this project which included three major components. First, a self-administered survey of hotel guests was conducted at numerous properties to gain an understanding of visitors who stay in paid accommodations. Second, a visitor intercept survey was conducted on a random sample of visitors at various San Francisco attractions to gather data from three types of visitors: those who stay in paid lodging, visiting friends and relatives who stay in private homes (VFRs) and day-trippers. Third, a self-administered computer-based survey of guests to San Francisco Travel Association's Visitor Information Center. These three components contributed to the most comprehensive visitor profile research conducted in San Francisco Travel Association's history.





**Results:** The San Francisco Travel Association utilized this vital market research to redevelop the San Francisco brand and the organization's marketing strategies, assist community stakeholders and educate the political establishment. Findings from this research confirmed that San Francisco remains a strong leisure and convention travel destination, drawing visitors from as near-by as the Bay Area and as far away as Europe, Asia, South America and Africa. This data allowed the organization to focus its efforts in the markets of highest value. Furthermore, the research helped with local membership building efforts. While most San Francisco's visitors travel to the traditionally visited areas of Union Square and Fisherman's Wharf, they also venture heavily into other neighborhoods, such as SOMA, the Marina and the Castro. This insight was critical in developing community outreach strategies and in working with the city's political establishment.

**Report:** A link to visitor statistics from San Francisco Travel Association's Visitor Profile & Tourism Economic Impact Study can be accessed online here:  
<http://www.sftravel.com/san-francisco-visitor-industry-statistics-1>

**Infographic Summary:** The images below present an infographic summary of findings produced and designed by the San Francisco Travel Association using data from research conducted by Destination Analysts. The data presented in the infographic summary is from the San Francisco Resident Study and the San Francisco Visitor Profile & Tourism Economic Impact Study conducted by Destination Analysts.



## CLIENT REFERENCES

The following references are travel and tourism industry clients for whom Destination Analysts has provided services similar in scope to the Visitor Profile Study. Vertigo Marketing and the City of Wilsonville is welcome to contact these references.

**Organization:** Visit Napa Valley  
Contact Name: Clay Gregory  
Contact Title: President & CEO  
Address: 1001 Second Street, Suite 330  
Napa, CA 94559  
Phone: (707) 260-0111  
Email Address: [clay@visitnapavalley.com](mailto:clay@visitnapavalley.com)  
Project: Napa Valley Visitor Profile & Tourism Economic Impact Study

**Organization:** Visit Santa Barbara  
Contact Name: Kathy Janega-Dykes  
Contact Title: President & CEO  
Address: 500 E. Montecito Street  
Santa Barbara, CA 93103  
Phone: (805) 966-9222  
Email Address: [kathy@santabarbaraca.com](mailto:kathy@santabarbaraca.com)  
Project: Santa Barbara Visitor Profile & Tourism Economic Impact Study

**Organization:** San Francisco Travel Association  
Contact Name: Howard Pickett  
Contact Title: Executive Vice President & Chief Marketing Officer  
Address: One Front St., Suite 2900  
San Francisco, CA 94111  
Phone: (415) 227-2680  
Email Address: [howard@sftravel.com](mailto:howard@sftravel.com)  
Project: San Francisco Visitor Profile & Tourism Economic Impact Study

# ABOUT DESTINATION ANALYSTS

Destination Analysts is a full-service marketing research firm specializing in the travel and tourism industry. Founded in 2003, our company provides destination marketing organizations with exceptional marketing intelligence so that they may ever evolve the effectiveness of their tourism marketing and advertising strategies. Destination Analysts has 13 years of experience performing services similar to those described within this proposal.

We feel we are an ideal fit to conduct a Visitor Profile Study for Vertigo Marketing and the City of Wilsonville for the following reasons:



- **We Speak the Language of DMOs:** We have an understanding of external and internal political forces that DMOs grapple with on a daily basis. Destination Analysts’ team is comprised of former destination marketers. This gives us a uniquely valuable understanding of the informational needs of destination marketing organizations, as well as an unrivaled expertise in the design and execution of research strategies to meet those needs. In addition to offering clear marketing direction, our research product will be carefully planned to address the media and political challenges faced by organizations like the City of Wilsonville. We pride ourselves on taking the most conservative approach in our estimations and ensuring that our clients can be fully confident in their results.

- **Visitor Research Expertise:** Our experience in conducting visitor research is unequalled. Our team has worked with numerous destinations in understanding its visitor base, and in ultimately helping them track and improve all aspects of their marketing strategy.
- **Tourism Industry Specialization:** Our team has worked with destinations around the world on all types of research required to effectively manage and grow a destination’s tourism brand. As highly sought destination industry consultants and thought leaders, our extensive knowledge of the destination marketing industry puts us in a unique position to provide significant added-value to Vertigo Marketing and the City of Wilsonville in the course of this project.
- **Past Experience:** Destination Analysts has experience in developing and managing research programs for destination marketing organizations. As a full-service yet boutique research firm, we offer a complete spectrum of research methodologies while providing clients like Vertigo Marketing and the City of Wilsonville the focus, personal attention and service its projects deserve. Our skill set includes both quantitative and qualitative marketing research, with expertise in branding, visitor profile development, ROI, advertising effectiveness tracking, segmentation, and website design evaluation and usability assessment. We also have extensive experience in all aspects of survey research—from large scale national consumer surveys to market focused consumer research.
- **Culture of Client Dedication:** Destination Analysts is truly committed to prioritizing the needs of its clients. As seasoned tourism professionals, our understanding of the unique challenges faced by our industry colleagues ensures that clients are given a sound interpretation of their research results, and thus the architecture of an effective strategy based on that research.

We strongly believe that these capacities will allow us to smoothly and effectively fulfill the ultimate scope of services for this project.

## PROJECT TEAM

This research will be designed by Destination Analysts' President, Erin Francis-Cummings. Erin will also oversee the overall management, analysis and reporting, along with Destination Analysts' Managing Director, Dave Bratton.



Erin Francis-Cummings  
President | CEO



Dave Bratton  
Managing Director | Founder

Field work, data preparation and analysis, and report development will be managed by these Destination Analysts staff:



Kimberly Vince-Cruz  
Senior Director of Research



David Reichbach, Esq.  
Director of Data Analytics



Myha Vo  
Director of Field Research



Proposal for:

# Visitor Profile Study

*Vertigo Marketing – Wilsonville, OR*



**Prepared for:**

*Vertigo Marketing  
Wilsonville, OR*

**Prepared by:**

*RRC Associates*

**Primary Contact:**

Mike Simone  
RRC Associates  
4770 Baseline Road, Ste. 360  
Boulder, CO 80303  
Direct: 303-396-6558 x2117  
mike@rrcassociates.com



December 1, 2017

Ms. Lynnette Braillard  
Creative Director and Co-Founder  
Vertigo Marketing

Via email: [lynnette@vertigomarketing.com](mailto:lynnette@vertigomarketing.com)

Dear Lynnette:

Thank you for the opportunity to submit this proposal to Vertigo Marketing to provide a visitor profile study for Wilsonville, OR. We believe RRC Associates is uniquely qualified to provide the kind of information and insight you are looking for in establishing a visitor profile in Wilsonville. Please keep in mind, we are flexible in terms of project scope and budget. We take pride in customizing our work to accommodate your needs and budget. We look forward to working with you on this important program.

Please don't hesitate to contact me with any questions or concerns you might have about the proposal.

Sincerely,

A handwritten signature in black ink that reads 'David R. Belin'. The signature is fluid and cursive, with a large initial 'D' and 'B'.

Dave Belin  
Director of Consulting Services  
RRC Associates

## Introduction and General Qualifications

RRC Associates is a consulting and research firm founded in 1983 and based in Boulder, Colorado. We specialize in providing services to the tourism and hospitality industry. Our firm has 14 persons on staff, representing a variety of disciplines and advanced degrees. The group has been blended to allow us to provide competent and cost effective consulting and information gathering services to a wide range of clients. For each client, we leverage the most appropriate research methodology, including surveys (Internet, mail, telephone, and intercept), focus groups, one-on-one interviews, panel research, and other research strategies. The extent of our involvement with clients frequently extends into the analysis and interpretation phases, and sometimes beyond.

Customization of work to meet the client's needs is an important part of our company's philosophy. RRC Associates is flexible in terms of project scope and budget and takes pride in customizing work to accommodate client requests. We work closely with our customers to create research programs that fit their needs, and our history of long-term involvement with clients speaks to our ability to satisfy needs over time. RRC Associates has conducted visitor research for numerous DMOs/CVBs across North America for the past 34 years.

## Goals of the Research

The primary objective of the visitor profile study research would be to provide information about visitors for Wilsonville's strategic marketing and planning efforts. Ultimately, the research would strive to measure and evaluate the characteristics and dynamics of tourism in Wilsonville.

The visitor profile study will rely on primary market research. Specifically, some of the topics that the research program would document include some or all of the following:

- Demographic information
- Market segmentation
- Prior visits to the area
- Purpose of the visit to Wilsonville
- Awareness and influence of advertising
- Trip planning information and resources
- Timeline of trip planning
- Activities participated in on the trip
- Length of trip
- Travel party composition and number
- Type of lodging, including rent-by-owner units
- Spending types and amounts/categories
- Travel mode to Wilsonville
- Other vacation areas considered instead of Wilsonville
- Geographic origin
- Other vacation areas visited in conjunction with the trip to Wilsonville
- Greatest strength and weakness of the area
- Other issues

We would work closely with you to design the survey questionnaire, such that the questions asked on the survey would provide the visitor information you need.

The results of the research would be presented with various breakouts and segmentations, such as visitor type, purpose of trip, type of accommodations, gender, family status, or any other variable on the survey. In this way, the results would provide greater value by profiling certain segments of interest, in addition to the overall total response.

## Recommended Approach

All market research/survey projects and methodologies have tradeoffs, including budget, sample size, staffing, timing, accuracy, and other considerations.

Our recommended approach includes a blend of three components:

1. Intercept survey with web survey follow up
2. Email survey
3. Website survey

This section outlines some details of the proposed methodology.

1. Intercept survey with web survey follow-up. One of the highest quality methodologies, and one that captures the broadest spectrum of visitors, is the traditional intercept survey. We propose an intercept survey methodology that employs an abbreviated questionnaire, asking only a few key questions, which would provide a brief snapshot of a representative sampling of Wilsonville visitors. The survey would be designed to capture the most critical demographic and visitation pattern responses, along with an email address to invite the visitor to participate in a follow-up survey online. This brief intercept survey is critical to gain a baseline of visitor data, given that approximately 70 percent of respondents will NOT complete the online follow-up survey (which leads to non-response bias). A few days after the data collection, RRC Associates would send the email invitation to complete the second part of the survey online.

We would work with you to identify the best locations for the intercept survey. RRC Associates would recruit, train, manage and employ the staff from the Wilsonville area or local students to conduct the intercept survey work. The interviewers would use preloaded electronic Nexus tablets provided by RRC Associates. The intercept survey would seek to capture visitors in various areas of the city.

The intercept survey would target a total of 600 completed surveys in summer 2018 and 600 completed surveys in winter 2018/19.

2. Email Survey. An important component of the research program would be to augment the intercept survey research with an email survey to groups of known visitors to Wilsonville. For example, an email survey could be sent to a database of individuals who have requested information about Wilsonville. Some of your partners (hotels and attractions) might have additional lists and databases that could prove useful to this component of the proposed research program. This proposal includes access to a link to an online survey for your partners to send out to their email lists.
  
3. Website Survey. A link to the online survey could be made available on the Wilsonville website, further serving to boost response from visitors, as well as those interested in visiting Wilsonville. Similarly, traffic to the online survey could be driven from available social media channels (e.g., Facebook, Twitter, Instagram). Using unique URLs for each location where the survey is posted would allow us to track where the respondent was directed from, thus providing additional insight into the effectiveness of promotions on Wilsonville's various online channels.

#### Timing and Deliverables

The timeframe for the Visitor Profile Study research would be two four-month periods: summer 2018 and winter 2018/19. The research project would therefore provide insight into the similarities and differences in the visitor profile throughout these two key seasons of the year.

The project would result in two deliverables: one report for the summer research and one for the winter research; the winter report would have comparisons to summer results.

Most of our reports are in PowerPoint format, with some narrative summary of highlights plus clear, graphically rich images and charts. Additional statistical cross tabulations and verbatim comments would be provided as appendices to supplement the Power Point report.

#### Incentive

For this project, a compelling incentive would be necessary to motivate participation in the research program. We would suggest something like a sweepstakes for airline tickets, an iPad, Wilsonville gift baskets, or other compelling incentives.



## Cost for Services

The total cost for the market study is presented below, using the approach outlined above. Note that we are flexible in terms of modifying the approach and budget in terms of frequency of reporting, depth of analysis, and other factors.

	Anticipated Budget
Wilsonville Visitor Profile Study, 2018-19  Includes: <ul style="list-style-type: none"><li>• Intercept survey for eight months – four months in summer and four months in winter</li><li>• Email survey to visitor database</li><li>• Online survey promoted on website and social media channels; unique URL tracking</li><li>• Two Power Point reports – one for summer and one for winter (with comparisons to summer)</li><li>• Cross-tabulation of results</li><li>• Presentation of open-ended comments</li><li>• \$500 worth of incentives for respondents</li></ul>	\$35,000

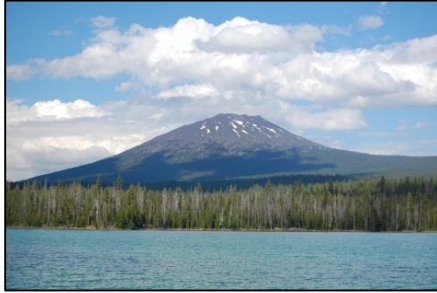
## Qualifications of Key Personnel

This section presents some brief information about the key personnel who would be involved with this project.

**Mike Simone – Lead Researcher.** Mike has been involved in a variety of research projects to the ski, gaming and travel industries, providing timely information to policy-makers on various important issues. Mike has worked closely with Visit Bend on numerous visitor studies and recently completed a Parks & Recreation study for Wilsonville. Examples of reports and projects include those documenting priorities for capital improvement decisions, pricing strategies, market-specific targeting, and other information relating to visitor opinions, satisfaction tracking and perceptions of product experience. Mike has also been engaged in a series of economic impact analyses measuring the effect of different special events in attracting visitors to resort vacation destinations. In addition, Mike has developed a niche in implementing parks, recreation, and open space needs assessment studies for towns and communities, the results of which typically become incorporated into the long-range goal of developing master plans. Mike has B.S. and M.S. degrees in Geography from Oklahoma State University.

**Sarah Esralew Hutson – Project Manager.** Sarah is based in Bend, Oregon, where she spearheads RRC's new Oregon office and is enthusiastic about expanding RRC's presence in the west. With nearly a decade of experience in survey research, Sarah is passionate about using customer insights to inform decision-making among both public and private sector clients across a wide variety of industries. Sarah works closely with RRC's parks and recreation, snowsports, marketing, and tourism clients. Previously, Sarah has conducted energy and political research. She is well-versed in applying both quantitative and qualitative research approaches to support a wide variety of projects including needs assessments, strategic planning, customer satisfaction, economic impact, benchmarking, market segmentation, and special events research. Sarah has a strong social science background, holding an MA in Communication from The Ohio State University and a BA in Communication from the University of Delaware. In her free time, Sarah loves to travel, hike, ski, and camp.

## Similar Projects and References



### **Bend Summer Visitor and Special Events Research**

RRC Associates has implemented a summer research program for Visit Bend during the summers of 2008, 2009, 2012, and 2013, and conducted research for the winter of 2015/16 as well as this summer for 2016. The intercept survey measures a variety of visitor and trip characteristics, and has provided the opportunity for Bend to track and understand visitors over time. In addition to general visitor research, RRC conducted intercept surveys during and immediately following the USA Cycling Masters Road National Championships in September 2012, and utilized survey data to measure the economic impact of the event. In addition to measuring economic impact, findings helped profile special events visitors and generated insights into how to improve the event. RRC oversaw a similar research effort in summer 2010, with a focus on Bend's summer concert series.

### **Wilsonville Parks & Recreation Study**

In June 2017, RRC Associates conducted a community-wide survey in the City of Wilsonville to support the update of the Parks & Recreation Master Plan to reflect resident interests. A varied methodology allowed a variety of resident to provide feedback on parks and recreation facilities, services, and programs. The results of the research program highlighted that residents have strong engagement with parks and recreation offerings in the community, with over 90% of invitation respondents indicating they had visited a park at least once in the past year. Results also highlighted community interest in enhanced trail/pathway connectivity, Willamette River access, open space preservation/land acquisition, and community events.



Not only are parks and recreation amenities resident assets, but visitor assets as well. RRC Associates' familiarity with the wide array of parks and recreation facilities and amenities in Wilsonville would assist in the interpretation of visitor activity participation and locations visited throughout Wilsonville. Furthermore, the understanding of residents gained from the research would additionally be a strength, given that residents play a strong role in attracting visitors (i.e., family and friends) to the area.

### **Visit McMinnville Visitor Research**

RRC conducted visitor research for Visit McMinnville during the summer/fall of 2016 using intercept-based survey methods. Conducted in a variety of locations throughout the city, the program was the first of its kind in McMinnville and provides a reliable baseline of data for future evaluations of visitor demographics and experience. The research identified key geographic markets, share of overnight vs. day visitation, the demographic profile of visitors, purpose of the visit, and ratings of the experience, among other key visitor metrics.



### **Boulder CVB Market Research**

RRC has conducted year-long visitor research for the Boulder Convention & Visitors Bureau for many years. The survey research is designed to probe a wide range of visitor and trip characteristics. Surveying takes place at strategically selected points around town, including the Pearl Street Mall, CU campus during athletic events, and Chautauqua Park. The program is tailored to obtain the most representative sample of visitors, and utilizes intercept, stationary Kiosks, and online survey methods.

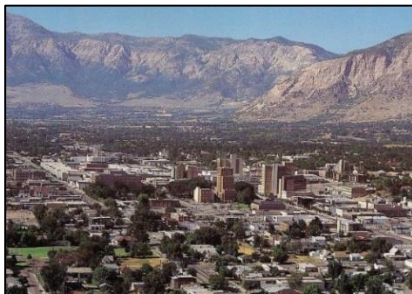


### **Downtown Durango Market Assessment**

RRC Associates used a combination of mailback surveys, shopper surveys, and secondary economic research to conduct a comprehensive downtown market assessment for Durango. One of the goals of the research was to assess the degree of “leakage” to other shopping areas in Durango as well as neighboring communities, the Internet, and so on, as well as to identify opportunities to enhance the competitiveness of the downtown retail, office, and residential markets. The survey research was designed to provide a detailed picture of the downtown in the broader community and regional context, as both patrons and non-patrons of downtown comprised the sample population. In addition to the sales leakage analysis, trends and perceptions of downtown (comparing patrons to non-patrons), barriers to increased visitation to downtown, and possible incentives/amenities for increasing patronage were analyzed.

### **Telluride Summer Market Research**

The research consisted of collecting and analyzing visitor feedback on a variety of topics, including prior summer and winter visitation, activities participated on during the trip, other areas/destinations visited, length of stay, amount spent, and satisfaction with various attributes of the Telluride area. The results provide a very complete profile of the visitor to the area, and are intended to provide useful information about the Telluride summer visitor to local tourism leaders, including insight for tailoring marketing messages and branding strategies, making improvements, addressing areas of weakness, and celebrating successes for the community as a whole.



### **Ogden Visitor Research**

As part of an effort to grow visitation and improve visitor experience, Visit Ogden commissioned winter and summer visitor studies with RRC Associates in 2014 and 2015. The results of these studies provided a better understanding of travel and visitation patterns to the area, including demographic characteristics of visitors, purpose of visit, activity participation and places visited, overnight visitor characteristics, transportation issues, trip expenditure levels, experiential ratings, and more. With this visitor profile, Visit Ogden is able to create a plan to improve off these benchmark metrics and towards their goals. RRC also conducts special events focused research for Visit Ogden on a regular basis.

### **Breckenridge Resort Chamber**

RRC Associates has worked with the Breckenridge Tourism Office (formerly the Resort Chamber) to measure and evaluate customer satisfaction, including NPS and other satisfaction metrics over a period of years. In summer 2014, we incorporated additional measures to the summer research to better understand visitor motivations and experience. A special element in the program included video-taping of some “prototypical” visitors to document verbatim comments and to connect the statistical results to actual visitor experiences in order to gain more in-depth understanding and to develop programs and strategies that are responsive to visitor desires. These efforts included ratings of local information sources including the Welcome (visitors) Center. Together, the different elements of the study generated extensive visitor profile and behavioral and satisfaction information, helping to measure the overall experience and to inform future decisions. Additionally, they are typical of RRC’s research program, constantly evolving and highly customized to the unique needs of a particular community.







### **Steamboat Springs Resort Chamber Association**

The Steamboat Springs Chamber Resort Association has worked with RRC Associates since 1991 in tracking the summer visitor profile over time, understanding the summer experience from the visitor's point of view, and ultimately improving the competitive position of Steamboat Springs. This multi-year effort has been designed to complement research conducted by the ski resort operator and to provide a complete picture of year-round visitation to the Steamboat area. The research has been based on a combination of intercept surveys (with an email follow-up) and kiosk surveys. Important pieces of data gathered in the survey research included reason for the visit, visitor spending, the role of special events, areas of strength, and areas for improvement. The information is shared with the community and the local government to get buy-in on the importance of summer tourism in Steamboat Springs.

## **References**

### **References**

- Valerie Warren, VP Operations & Policy, Visit Bend, (541) 382-8048
- Kara Stoller, Executive Director, Steamboat Springs Resort Chamber Association, (970) 875-7007
- Lucy Kay, President, Breckenridge Tourism Office, (970) 453-5052
- Mary Ann Mahoney, Executive Director, Boulder Convention & Visitors Bureau (303) 442-2911
- Sean Maher, Executive Director, Downtown Boulder Inc., Boulder, CO, (303) 449-3774
- Michael Berry, President, National Ski Areas Association, (303) 987-1111

## **Additional Firm Information**

### Company Contact Information

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## Conclusion

Thank you again for contacting us regarding this project. We believe that the outlined scope of work will prove helpful to Wilsonville and we would be excited to have the opportunity to be of assistance. Please keep in mind that we are open to refining any part of the proposed scope of work and budget to best meet your needs. We look forward to hearing from you and the opportunity to further discuss our proposal.

Sincerely,

A handwritten signature in black ink that reads "David R. Belin". The signature is written in a cursive, flowing style.

Dave Belin  
Director of Consulting Services  
RRC Associates