



W.S.A.

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September 1, 2004

Board of County Commissioners
Lane County
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Dear Commissioner:

Enclosed please find the FY04 Annual Report published by the Convention & Visitors Association of Lane County Oregon. This report is intended to meet the reporting requirements outlined in our marketing contract with Lane County.

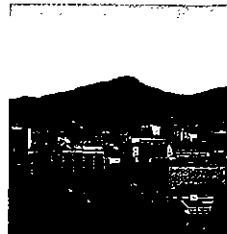
Included on page three is an executive summary, which gives a quick overview of our achievements during the last program year, July 1, 2003 through June 30, 2004. Program details follow that summary, and give a full sense of the scope of our work. We had some challenges this past year as well as some great successes. We find ourselves in an increasingly competitive environment for convention, meeting, and sports related business and there is much work to be done. At the same time, summer travel demand was up for our area this summer, and the opportunity to leverage statewide marketing efforts lies just ahead.

I am grateful for the hard work of the staff here at CVALCO. We remain very focused on our mission of attracting overnight visitors to Lane County. We are all very proud to serve the citizens of Lane County in our role of attracting new visitor dollars to the local economy.

I look forward to discussing this report with you in person on September 15. Thank you for your continued support and recognition of our marketing programs.

Sincerely,

Kari Westlund
President & CEO



See All of Oregon in Lane County

FY04 Annual Report

Program Year Ended June 30, 2004

Convention &
Visitors Association of
**Lane
County**
OREGON

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Executive Summary

Overall Returns Measured: \$33,793,436 **Room Tax Investment:** \$1,027,425 **Ratio:** 32.89:1

For every dollar of room tax invested by Lane County in CVALCO, more than \$32.89 in visitor spending came, or will come, back to the county economy. This is an estimate of direct expenditures; no multipliers are incorporated. No economic returns are associated with CVALCO's Web site. In addition to \$186,271 in private dollar revenues and in-kind support, CVALCO generated \$1.45 million in public relations exposure, dramatically extending the reach of its budget.

Convention Sales	<i>FY04 Goal</i>	FY04	FY03	FY02	FY01
Leads Achieved	192	186	183	182	193
Room Nights Booked	104,789	42,908	99,799	84,766	67,889
Delegates Booked	293,792	90,278	279,802	116,496	95,243
Tourism Sales	<i>FY04 Goal</i>	FY04	FY03	FY02	FY01
Ad Responses	26,000	49,535	19,265	37,804	38,967
Media (non-local)	\$1,800,000	\$1,417,911	\$1,412,858	\$1,744,570	\$1,886,894
Trade Contacts	500	150	222	430	306
Visitor Services	<i>FY04 Goal</i>	FY04	FY03	FY02	FY01
Walk-ins	8,180	7,643	7,481	6,762	9,244
Mail/Phone/Ad Inquiries	n/a	55,023	27,714	47,297	56,743
Visitor Van	14,700	16,216	12,837	12,146	11,197
Total		78,882	48,032	66,205	77,164
Web site	<i>FY04 Goal</i>	FY04	FY03	FY02	FY01
Users	400,000	347,957	302,063	239,211	119,159
Hits		7,138,045	5,767,388	4,559,681	1,645,239
Membership	<i>FY04 Goal</i>	FY04	FY03	FY02	FY01
New Members	60	69	65	60	66
Community Relations	<i>FY04 Goal</i>	FY04	FY03	FY02	FY01
Media (local)	\$40,000	\$23,821	\$36,979	\$42,035	\$36,705
Media (national convention)	n/a	\$11,188	\$21,699	\$6,948	\$17,815
Press Releases	36	51	53	49	59
Media Stories	n/a	112	120	144	151
Presentations	24	28	18	30	30

Youth Oriented Programs

CVALCO worked with youth in a variety of ways during the year. Interns from the University of Oregon and Northwest Christian College worked with staff on projects to learn about and gain tourism-related work experience. Sheldon High School students gained hands-on experience and provided valuable assistance to CVALCO's visitor fulfillment sector. Presentations about tourism-related careers were given at the college level.

Travel and Tourism: An Economic Generator

Return on Lane County Room Tax Investment in CVALCO

Not all of CVALCO's marketing efforts are quantifiably measurable in the returns they provide, and much of its marketing is labor intensive and customer service oriented. CVALCO does, however, measure many of its programs. Summarizing those programs measured for quantifiable returns, an investment of \$1 million by Lane County into CVALCO secured more than \$33.7 million¹ in economic impact to the county during the FY04 program year.

Private businesses contributed \$186,271 in cash and in-kind donations to leverage Lane County's investment and increased CVALCO's overall effectiveness. Media relations efforts at the local and national level extended the reach of CVALCO's budget by another \$1.45 million.

Tourism in Lane County

Lane County is continuing to experience steady growth in visitor spending. Overall, travel revenues in Lane County reached \$472.7 million² in 2003, a 1.7 percent increase from 2002, and a 61.9 percent increase from 1991. The visitor industry in Lane County is made up of many small and medium sized businesses. Together they employed an estimated 7,660 people and paid out \$129.0 million in earnings in 2003.³

Tourism in Oregon

During 2003, travelers to Oregon contributed an estimated \$6.3 billion directly to the state economy, supporting 129,200 jobs and \$3 billion⁴ in earnings.

Tourism in America

As one of the world's largest and fastest growing industries, travel and tourism generated \$545.5 billion⁵ in travel expenditures during 2002. Tourism supported 7.2 million jobs for Americans, with a payroll of nearly \$157.0 billion, making it one of America's largest employers. Travel and tourism remains America's third largest retail industry. It also generated \$93.2 billion in federal, state, and local tax revenues.

CVALCO: A Private-Public Partnership

A recognized visitor industry leader, CVALCO partners with business, civic, government and community groups, including its 415 members. As a private, nonprofit corporation, CVALCO is governed by a 30-member board of directors, including representatives from the Lane County Board of Commissioners, the Eugene City Council, and the Springfield City Council. Ex-officio board members provide additional links to city and county government.

CVALCO is funded by county room tax, paid by visitors staying overnight in commercial lodging and campgrounds. It receives a specified percentage of room taxes collected by the County. This method of funding sets up a healthy incentive; the better job CVALCO does at bringing overnight visitors and their dollars into the county, the more funds it receives to use in marketing.

CVALCO's Mission

CVALCO is dedicated to its mission of increasing the number of overnight visitors to Lane County for the benefit of its members and all businesses and citizens who depend on a strong Lane County economy. CVALCO continues to implement aggressive marketing strategies to promote Lane County as a convention, meeting, event and leisure-travel destination. Ongoing areas of focus include convention sales and service, tourism marketing, visitor information services, membership and community relations.

Room Tax

During FY04, overall room tax collections increased by 5.71 percent, with most communities seeing healthy growth. Cottage Grove experienced the highest jump, primarily due the Village Green's renovations and return to a more full-scale operation. Eugene posted the next highest increase likely picking up room nights from Springfield following the closure of the Clarion Hotel in March. That resulted in the loss of 234 rooms contributing to Springfield's overall decline of 6.9 percent. Meanwhile, Florence collections rose 4 percent over last year compared to a nearly 4 percent decline the previous year.

Lane County Room Tax Collection Summary

	FY04	FY03	FY02	FY01	FY00
Eugene	↑12.8	↓3.72	↑2.96%	↑6.9%	↑0.03%
Springfield	↓6.9	↑0.76	↓3.72%	↓3.8%	↑8.9%
Florence	↑4.0	↓3.82	↑1.30%	↓1.8%	↑14.8%
Cottage Grove	↑17.9	↓7.40	↓3.65%	↓15.1%	↓2.4%
Other	↑2.59	↑8.43	↑1.37%	↑0.7%	↑9.1%
Total Tax	↑5.71	↓0.92	↑0.64%	↑1.7%	↑4.3%

Source: Lane County Transient Room Tax Collections Monthly Reports.

Hotel/Motel Occupancy for Lane County Metro Area

Room tax collections are a function of both occupancy and price. Through a weekly survey, CVALCO assists in tracking actual room occupancy rates. Figures are based on a sample of more than 2,000 Eugene/Springfield metro area hotel/motel rooms. During FY04, the average occupancy rate was 63.02 percent, an 11 percent increase over FY03's 58.68 percent figure. The increase in occupancy was higher than the increase in room tax due to the closure of The Clarion Hotel in March. While visitors to the area did increase, remaining hotels also benefited from less competition.

Eugene Airport Deplanements/Service

As Oregon's second busiest airport, the Eugene Airport reported a total of 319,187 deplanements during FY04, up 6 percent from FY03. During the year, United Express moved from six to seven daily flight options between Eugene and San Francisco and added a third daily flight between Eugene and Denver in March. Also in March, America West temporarily restored its seven-day service between Eugene and Las Vegas, but will reduce the service to three days a week in the fall due to seasonal declines in passenger traffic. Meanwhile, two daily round-trip flights between Eugene and Salt Lake City began in May on SkyWest, a Delta Connection carrier providing more options for travelers.

Groundbreaking in late June marked the beginning of the Eugene Airport's \$16.5 million construction of a new 6,000-foot runway—the largest development in at least 20 years. The new runway will serve as backup for commercial air carriers, running parallel to the primary 8,000-foot runway. This new runway system will provide greater capacity and safety, allowing airplanes to take off and land simultaneously. The airport expects to open the new runway in late 2005.

Convention Sales & Marketing

Pat Phillips, Vice President of Convention Marketing
Sue Gorham, Convention Sales Manager
Sue Krug, Convention Sales Manager

Michelle Geschke, Convention Sales Manager
Kerry Bunnard, Convention Sales Manager
Santee Hansen, Convention Services Manager

The Convention Sales and Marketing Department continued to implement strategies to attract conventions, meetings and events to Lane County. Among the variety of markets CVALCO's sales team pursued, specific emphasis was made in connecting with both the military reunion market and the sports market to uncover new business and grow existing events. The staff's sales efforts secured a direct economic impact of \$19.7 million in convention/event delegate spending. Trade shows, sales presentations, advertising campaigns, direct sales calls, and special sales missions, targeting meeting and event planners, have continued to be effective in increasing overnight visits to Lane County.

Business Booked	FY04	FY03	FY02	FY01	% Change since FY03
Conventions/Events	132	153	151	152*	↓13.7%
New Business	36	65	63	69*	↓44.6%
Delegates	90,278	279,802	116,496	95,243	↓67.7%
Room Nights	42,908	99,799	84,766	67,889	↓57%
Est. Economic Impact	\$19.7 million	\$41 million	\$37 million	\$34 million	↓51.9%

*revised

A decline in the FY04 figures is exacerbated by the multiple-year bookings for the Oregon School Activities Association (OSAA) football, basketball and track that occurred in FY03. Those confirmations included 199,250 delegates, 46,162 room nights, and more than \$17.8 million in estimated economic impact. Due to the exceptional nature of the OSAA bookings, a comparison without those events is as follows:

Yearly Comparison without FY03 OSAA Bookings:

	FY04	FY03	% Change
Delegates	90,278	80,552	↑12%
Room Nights	42,908	53,637	↓20%
Est. Economic Impact	\$19.7 million	\$23.3 million	↓18.3%

Leads	FY04	FY03	FY02	FY01	% Change since FY03
Total Leads Generated	186	183	182	193	↑2.2%
Confirmed	125 (67%)	134 (73%)	116 (64%)	122 (63%)	↓6.7%
Pending	23 (12%)	12 (7%)	13 (7%)	44 (23%)	↑91.6%
Lost	33 (18%)	29 (16%)	37 (20%)	25 (13%)	↑13.7%
Cancelled/Postponed	5 (3%)	8 (4%)	13 (7%)	2 (1%)	↓37.5%

The higher than typical number of pending leads at year-end adds to the booking gap for the year. Approximately half of the remaining leads pending are for new business, a key area of concern.

Sample Confirmations	Meeting Date	Delegates
2003 OASIS BMX Program	2003 – 2004	3,000
Independent Order of Oddfellows & Rebekah	2005	488
Bellweather, Inc.	2003	400
Cascade Team Penning Association	2004	300
Oregon Chamber of Commerce Ambassadors	2005	300

Tradeshow Participation

Participation in industry trade shows continued to play an important part of the sales team's marketing strategy. During FY04, the sales staff attended the following shows to meet with meeting planners and promote Lane County as a meeting destination:

Affordable Meetings, Long Beach, CA	Society of Government Meeting Planners, Salem, OR
Teams 2003, New Orleans, LA	Destination Showcase, Washington, D.C.
Reunion Network, Albuquerque, NM	Healthcare Convention & Exhibitors Association, Austin, TX

Site Inspections

CVALCO conducted site inspections and tours of the area for meeting planners. Site inspections that resulted in bookings are below. A site inspection was also conducted for Triple Crown Sports.

	Meeting Date	Delegates
Daughters of the American Revolution	May 2005	150
Veterans of Foreign Wars	June 2004	325
Oregon Association for Alternatives in Education	October 2004	200
Archetypal Tarot Counseling	June 2004	30
Red Devil Military Reunion	October 2004	40
TOPS Annual Conference	2007	TBD

Hospitality Partnership Return

The Hospitality Partnership Return (HPR) program has helped keep business in Lane County while providing marketing dollars for participating groups to grow their meeting/event size. During FY04, groups included the Track City Classic and the National Academy of Artistic Gymnastics.

Meeting & Event Planning Expo

During the first half of FY04, the department organized the Meeting & Event Planning Expo at the Lane Events Center. The Expo provided an opportunity for meeting and event planners from around the state to connect with Lane County's local tourism and convention-related professionals. Approximately 100 meeting and event planners attended the event and 26 CVALCO members set up exhibits. Hospitality students from Lane Community College also attended the event.

Convention Leadership Awards

CVALCO presented its Convention Leadership Awards to local residents that were directly responsible for the confirmation of a meeting or event that brought a significant number of overnight visitors to Lane County. Recipients included: Richard Pettigrew, The Archaeology Channel, International Film and Video Festival; and Bill Moos, Athletic Director, University of

Oregon. CVALCO also nominated six individuals for special statewide recognition for bringing meetings and events to Lane County. They were recognized at a June "Bring It Home" kick-off campaign led by Governor Ted Kulongoski.

Sports Marketing

CVALCO worked to retain and attract sporting events to Lane County. Biking continued to be a strong niche with a wide variety of competitive events to pursue, including mountain, road, and tandem varieties. In October, CVALCO attended the TEAMS 2003 sports trade show, in New Orleans, to promote Lane County's sports facilities and services. Meanwhile, the ground breaking and initial construction phase of the Lane Regional Sports Center got underway during the year. The multi-use arena, in Springfield, will be used for indoor practice and performance sports and will be available to host sports events of local, regional, national and international stature.

Meeting Facility Development

Discussion surrounding a future civic center in Springfield continued throughout the fiscal year. In addition, both Eugene and Springfield leaders continued to express interest in building a convention or meeting-related center. This past year also saw the closure of the Clarion Hotel, which eliminated 234 sleeping rooms and 12,000 square feet of meeting space. The loss has impacted CVALCO's ability to market to larger groups requiring a significant number of sleeping rooms. Following the January 2004 Tourism Summit of Lane County, a Lane County Regional Tourism Infrastructure Task Force was developed to examine Lane County's current tourism infrastructure. It will be specifically looking at the status of meeting facility development in Lane County as well as its competitive regions, which have experienced significant growth in convention and meeting space development.

Convention Services Program

The Convention Services program continued to provide services to meeting planners, assistance at meetings/event and provide a link between planners and CVALCO members.

Services were designed to help ensure the overall success of meetings/events, increase the chances for repeat business and ease the planners ability to utilize applicable CVALCO member products and services. Service and information leads, identifying planner needs, were sent to CVALCO members to help them procure business. Meeting planners requested help with catering, tours, transportation, trade show vendors, discount coupons and promotional items.

Gift bags and baskets were distributed to various businesses, conventions and events, including: the Association of Oregon Loggers, Association for Direct Instruction, Black Sheep Gathering, Pacific NW District of Kiwanis International, National Association of Letter Carriers, NW Anthropology Association, the Oregon Library Association, Chiefs of Police Association, and the Oregon Logging Conference.

CVALCO worked with the Black Sheep Gathering committee and helped launch a survey that provided them with information about their attendees. It also provided CVALCO with insight into where the attendees were staying and how much room tax the group helped generate.

More than 150,000 delegates representing 200 groups received services during FY04. A room referral program was also implemented for 16 conventions/events, assisting planners and delegates in booking reservations during events with citywide lodging demands. The following large-scale groups prompted significant welcome efforts, housing referral services and the utilization of nearly all CVALCO convention services:

Group	Delegates
Oregon Logging Conference	4,210
Black Sheep Gathering	1,300
Association for Direct Instruction	800
Oregon Library Association	600
Naval Cryptological Veterans Association	600
11 th Armored Cavalry's Veterans of Vietnam & Cambodia	1,100
NW Anthropology Association	350

Promotional Assistance/Committees

The Convention Services program worked to boost attendance for upcoming Lane County conventions by attending those conventions in preceding host cities. Conventions included the Association of Oregon Counties, Pacific NW District of Kiwanis International and the Oregon Rotary District #5110. The Convention Services program also served on the planning committee for the 2004 Cascade Occupational Safety & Health Conference, Rotary and Kiwanis.

Tourism Marketing & Sales

Natalie Inouye, V.P. of Tourism Marketing

Joanne Holland-Bak, Director of Tourism Marketing

Debbie Williamson-Smith, Tourism Public Relations Manager

Katie Onstad, Tourism Sales Manager

CVALCO's Tourism Marketing and Sales Department experienced significant growth in visitor inquiries as a result of its destination advertising and regional partnerships. Travel trade shows and extensive media coverage also contributed to the department's effective marketing strategies designed to gain exposure for Lane County and lure both group tour and independent leisure travelers to the area. Tourism marketing efforts during FY04 resulted in more than \$8 million in returns from inquiry generation, fulfillment and bulk brochure distribution alone.

Leisure Marketing

Lane County continued to be a draw for independent leisure travelers seeking scenic beauty, nature-based recreation opportunities and highly acclaimed cultural and performing arts events and activities. CVALCO marketing efforts capitalized on the brand awareness of Oregon with special focus on activities for visitors to enjoy.

CVALCO Destination Advertising

Effective advertising placement remained crucial for generating requests and increasing visitation to Lane County. During the period, CVALCO tracked 20,086 responses directly linked to CVALCO advertisements—a considerable jump over last year. Ads placed in both *Good Housekeeping* and the Oregon Attractions Insert, placed in newspapers throughout Oregon and other Western States, generated the greatest response. Responses were also received from ads placed in *Northwest Travel*, *Oregon Coast Magazine* and *Travel Oregon*.

CVALCO launched an in-state marketing campaign to reach the Portland, Central Oregon and Southern Oregon markets. The campaign included coordinated radio advertising, promotions and editorial outreach in all three markets. KEZI donated \$17,000 in air time for a television commercial promoting Lane County, which ran in Portland on Comcast 14 and on KEZI's affiliates in Roseburg, Medford and Klamath Falls.

Regional Partnerships

Regional partnerships played a critical role in generating visitor information inquiries, which more than doubled FY03 figures. A total of 29,449 visitor information requests or leads resulted from partnerships with the Oregon Coast Visitors Association, the Willamette Valley Visitors Association and most significantly through the Oregon Tourism Commission's leads program. These requests and leads were fulfilled with CVALCO's Visitor Guide. CVALCO continued its partnership with three Northwest cities and Canada in the Cultural Cascades marketing campaign. CVALCO maintained leadership positions in regional associations. Natalie Inouye served on the board of the Willamette Valley Visitors Association and as marketing chair of the Oregon Coast Visitors Association. Debbie Williamson-Smith and Kari Westlund served on the Cultural Cascades committee. Governor Kulongoski appointed Westlund to the Oregon Tourism Commission.

Visitor Inquiries					%Change
Generated by:	FY04	FY03	FY02	FY01	since FY03
Destination Advertising	20,086	7,744	6,168	15,949	↑159%
Regional Partnerships	<u>29,449</u>	<u>11,521</u>	<u>31,636</u>	<u>23,018</u>	↑155%
Total	49,535	19,265	37,804	38,967	↑157%

Top Geographic Markets

Requests for information and actual visitors to Lane County came from a variety of domestic and international origins. Top international markets included: Canada, Germany, United Kingdom, Japan, Romania, Australia, Switzerland, Russia, The Netherlands, Ukraine and Italy. Top U.S. markets included: California, Oregon, Washington, Texas, New York, Florida, Illinois, Idaho, Arizona, Pennsylvania and Ohio. Top Oregon markets included: Eugene, Portland, Springfield, Florence, Salem, Beaverton, Bend, Medford, Corvallis, Albany, Junction City, Klamath Falls, Roseburg and Hillsboro. Resident inquiries generally reflect the hosting of friends and family from outside the area.

Consumer Travel Shows

Consumer travel shows played an important role in generating destination awareness and attracting leisure travelers to Lane County. CVALCO took part in four consumer shows including the Sisters Quilt Show, Oregon State Fair, Stayton Covered Bridge Festival and the Sunset Celebration Weekend. CVALCO, in partnership with the Oregon Coast Visitors Association (OCVA), displayed promotional literature at five additional consumer shows. Participation in these shows generated a total of 3,646 leads during FY04.

Travel Trade Marketing

Travel trade shows, advertising and partnerships continued to be effective means for attracting new group tour travel business to Lane County. During the year, CVALCO attended the National Tour Association's Annual Convention in Charlotte, NC. CVALCO focused on reaching the international market by attending the International Tourism Bourse (ITB) in Berlin, Germany; and Pow Wow in Los Angeles. CVALCO's participation in trade shows generated 150 leads.

CVALCO partnered with various members to give international clients an opportunity to see and experience what Lane County has to offer, and to sample Lane County products first-hand through a variety of research tours. During the year, research tours were given to German, Dutch and Japanese travel trade media.

CVALCO advertised in the Group Tour Magazine, which generated 75 requests from tour operators and group leaders.

Group Tour Tracking

CVALCO works with a core group of accommodations and attractions that are regularly reporting their tour business. The results of the groups CVALCO was able to track generated 2,272 room nights and 6,307 passengers, resulting in \$826,217 in spending⁸ in FY04:

	FY04	FY03	FY02	FY01	FY00
Group Travelers	6,307	5,085	9,438	3,936	5,651
Room Nights	2,272	1,368	2,046	1,938	2,600

The total number of actual group tour travelers and complete economic impact are unknown as CVALCO relies on voluntary reports from lodging, attraction, and restaurant operators.

Media Relations/Editorial

Extensive national and international media coverage provided publicity and exposure for Lane County valued at \$1,417,911. Print and broadcast media highlights included: ABC's "The View," Alaska Airlines Magazine, America Journal (German magazine), Arthur Frommer's Budget Travel, Country Coach Destinations, Destinations, Group Tour Magazine, Idaho Statesman, Los Angeles Times, Northwest Travel, Oregon Coast Magazine, Oregonian, Sunset, Travel America, Travel Oregon, VIA and the Washington Post.

CVALCO generated coverage through press releases and by assisting various regional, national and international media for articles, television programs and guidebooks. Subjects included Lane County's events, activities, new brochures, attractions, wineries, gardens, performing arts and culture. Media ranged from regional newspapers to national guidebooks to internationally broadcast travel shows.

Press trips, representing various media, contributed to CVALCO's overall editorial coverage. During the period, CVALCO participated in seven press trips.

Film & Video

The Tourism Department continued its partnership with the Oregon Film and Video office by assisting production companies considering Lane County as a site for filming projects. During the period, CVALCO provided research and assistance for nine feature films, one independent feature film, four television segments/series, three commercials, one documentary, one casting call and five broadcast media. Services included permit, travel and lodging assistance, location scouting, casting calls and providing location files, or images, of Lane County venues appropriate to filming requirements.

"The Sisters," a Chambers Productions picture, was among the films CVALCO assisted. The movie, filmed entirely in Lane County, was the first major commercial production to film in the area in eight years. The production had a budget of \$5.5 million dollars and generated over 500 room nights in the Eugene and Springfield area during April and May.

Debbie Williamson-Smith served as vice-president of the Mid-Oregon Production Arts Network. Duties included assisting the president, government relations and overseeing publicity for the organization. Debbie also serves as our liaison to the Oregon Film Office.

Lane County Fair Photo Contest

CVALCO participated in the annual Lane County Fair Photo Contest by purchasing the winning entries. As a result, three new images were added to CVALCO's inventory of images used for publications and editorial needs.

Publications

The Tourism Department revised and reprinted 100,000 copies of the Official Lane County Oregon Visitor Guide and 150,000 copies of the visitor map, inserted in the guide and printed in pads. The guide, which includes a cover photo of Heceta Head lighthouse, was revised to include a section on Lane County road trips and more large-scaled photos.

The publication of the Lane County Annual Calendar was made available in an easy printable format, known as a portable document format (PDF), on CVALCO's Web site.

Staff Changes

Joanne Holland-Bak, director of tourism marketing, left CVALCO in March for a job at the Oregon Tourism Commission. The Tourism Department was restructured with Debbie Williamson-Smith becoming the tourism public relations manager. She now manages CVALCO's destination public relations efforts. Katie Onstad, tourism sales manager, joined CVALCO in April taking on domestic and international travel trade sales and consumer shows.

Visitor Services

Natalie Inouye, V.P. of Tourism Marketing
 Kris Redmond, Visitor Services Program Manager
 Meg Trendler, Visitor Services Manager
 Elizabeth Wilde, Membership Services/Visitor Services
 Pujita Mayeda, Fulfillment & Membership Services Mgr.

Margaret DeYoung, Visitor Fulfillment Specialist
 Visitor Services Specialists: Barbara Allen, Vivian Doolittle, Audi Fleishman, Jamee Henson-Hammer, Karen Long, Larry Moran, Krista Phillips, Marcella Schoen and Geoffrey Wilson.

As CVALCO's front line, Visitor Services continued to play an essential role in the distribution of visitor information and promotion of Lane County. The department fulfilled all visitor information requests derived from Visitor Center and Visitor Van operations and requests received via phone, mail or advertising labels. The department continued to track and maintain detailed accounts of information requests and their places of origin for strategic marketing purposes. As a pilot participant in the new statewide Q Program, CVALCO also began spearheading efforts to train and certify front-line staff in customer service.

Visitor Information Requests

Phone and mail requests climbed significantly reflecting the overall rise in CVALCO's advertising responses outlined in the Tourism Sales and Marketing Department. Walk-in visits to CVALCO's Visitor Center remained steady and Web site users continued to grow at a sufficient rate. CVALCO's Visitor Van also saw a notable jump as it continued to increase opportunities to connect with visitors, residents and CVALCO members as it traveled throughout the county to events, attractions and other points of interest. Throughout the period, the van staff served a total of 16,216 people, a 26 percent jump from last year. Visitor spending increased an estimated \$3,518,872 as a result of this outreach.

Estimated economic impacts reflected in this section are dollars attributable to CVALCO's leisure marketing efforts and don't reflect overall visitor spending, which totals \$472.7 million⁹ annually in Lane County. The economic impact figures here are not inclusive of all CVALCO returns; only those programs CVALCO can verify through tracking and published research methods.

	FY04	FY03	FY02	FY01	% Change (04 to 03)	FY04 EEI
Walk-In	7,643	7,481	6,762	9,244	↑2.2%	\$1,658,531
Phone/Mail*	55,023	27,714	47,297	56,743	↑98.5%	\$5,662,888
Visitor Van	<u>16,216</u>	<u>12,837</u>	<u>12,146</u>	<u>11,197</u>	<u>↑26%</u>	<u>\$3,518,872</u>
Total	78,882	48,032	66,205	77,164	↑64.2%	\$10,840,291

*Includes ad responses, faxes, e-mail and general information inquiries.

	FY04	FY03	FY02	FY01	% Change (04 to 03)
Web site					
Users	347,957	302,063	239,211	119,159	↑15.1%
Hits	7,138,045	5,767,388	4,559,681	1,645,239	↑23.7%

*Users are tracked each time an individual enters CVALCO's site. Hits are counted for each page visit or individual search on the site.

Relocation Requests

Relocation requests made up 2,111 visitor information inquiries, up 10 percent over last year. Requests were fulfilled with CVALCO's Official Lane County Oregon Relocation Guide and an Official Lane County Oregon Visitor Guide. Visitors receiving CVALCO's Relocation Guide were given countywide information and overviews of its communities. They also were directed to individual chambers of commerce and CVALCO real estate members for additional relocation information.

State Welcome Center Distribution

CVALCO tracked the distribution of at least 9,455 Official Lane County Oregon Visitor Guides and 9,185 promotional brochures to welcome centers and visitor information centers around the state. This resulted in \$2,426,928 in economic activity in Lane County.¹⁰

Oregon's "Q" Program: New Standards in Quality Visitor Services

CVALCO participated in the inaugural season of the Q Program, a statewide certification class in customer service training for front-line employees. Through a partnership with the Oregon Tourism Commission and Oregon Restaurant Education Foundation, the program was created in alignment with the National Skills Standards Board to establish new standards in quality visitor services. The curriculum entitled "It Pays to Please" is a three-hour class that validates existing workplace training while providing specific, practical customer service skills and local visitor information resources. CVALCO was recognized for its outstanding contribution to the Q program at the 2004 Governor's Conference where Governor Ted Kulongoski presented CVALCO with a "2003 Oregon Welcomes You" award.

Staff Changes/Volunteers

Pujita Mayeda joined CVALCO in August to replace Elizabeth Wilde. Meg Trendler took over as the visitor services manager in March replacing Kris Redmond who left to become the director of the Springfield Museum.

In addition to CVALCO's permanent front-line staff, volunteers through Lane Workforce Partnership and the National Council on the Aging made significant contributions in helping CVALCO assist visitors during an exceptionally busy year.

Membership Development and Marketing

Sally McAleer, Vice President Membership Development & Organizational Marketing

Elizabeth Wilde, Membership & Visitor Services

Pujita Mayeda, Fulfillment & Member Services Manager

During the year the primary focus of the vice president of membership has been the continued development of the CVALCO Web site and integrated database. The half-time position continued to support the Membership Department in data entry, member event planning and member retention. The Membership Department continued to help members utilize CVALCO's marketing tools to promote themselves to visitors and other members. The quality products and services members provide are key to the success of CVALCO and Lane County's visitor industry.

Membership Sales and Retention

Memberships increased by 2.4 percent over last year.

Membership	FY04	FY03	FY02	FY01	FY99
New Members	69	65	60	66	74
Lost Members	59	46	68	67	50
Net Gain/Lost	+10	+19	-8	-1	+24
Total Members	415	405	386	403	404
Total Revenue	\$86,123	\$89,154	\$78,026	\$86,012	\$82,162

Web Site/Database Development

About 50 percent of CVALCO's vice president of membership's hours were spent on Web site and database issues for the organization. The Web site continued to gain users annually and CVALCO's ability to expand offerings through the Web has helped keep information fresh so users will keep coming back. One new feature is the Web site content pages can now be converted to printed pieces with photos.

The first eight months of this fiscal year were spent on developing the visitor services contact management. Other web database features were added on the administrative database for CVALCO staff's use. Sales database development was completed to revise the Convention Sales Department sales leads. Current Web site statistics are included in the Visitor Services section of this report.

Membership Meetings/Outreach

CVALCO continued to hold quarterly Membership Briefings giving members the chance to meet CVALCO staff and learn more about ways to market their business. Members were also given the opportunity to talk about their business or product to CVALCO staff during quarterly Membership Spotlight meetings.

Additional membership functions included the holiday party at the University of Oregon Museum of Natural History and a special CVALCO open house to announce and release the 2004 Official Lane County Oregon Visitor Guide.

The Annual Visitor Industry Celebration was held at the Hilton Eugene & Conference Center to recognize visitor industry achievements and honor CVALCO members. The Blue Heron Thank You Award winner was Bob Zagorin of Diamond & Zagorin Creative Strategies. The Blue Heron

Destination Promotion Award was presented to the Hult Center for the Performing Arts. The Blue Heron Hospitality Award winner was Katrina Brown, former Clarion Hotel sales manager who later moved to the Courtyard by Marriott. Partnership Awards were given to Lawrence Fox of the Driftwood Shores; Ed Madison with Rustic Canyon Entertainment and Tom and Julie Johns with Territorial Seed. Paula Beach of Sterling Savings Bank was the recipient of the ROSE Award and a Special Recognition award was presented to Eugene's outgoing Mayor Jim Torrey. CVALCO Convention Leadership Awards were also given to Bill Moos, UO athletic director; and Richard Pettigrew, with the Archaeology Channel International Film and Video Festival.

Special membership outreach trips provided CVALCO staff the chance to spend one day a month visiting members in specific regions of the county. This is an opportunity to remind members of the benefits they receive, deliver collateral materials and show them that we care about their business. It also provides staff with an opportunity to see the businesses they are promoting.

Communications

The Member Services position continued a regular schedule of contacting new members and calling renewing members to thank them for rejoining. A revised Marketing Opportunities piece was created to inform member of the marketing opportunities and CVALCO advertising rates available throughout the year.

The on-going communication with members through the weekly updates and quarterly newsletter were transferred to the Community Relations Department during this fiscal year.

Publications

In July, commissioned sales staff began advertising sales for the Official Lane County Oregon Relocation Guide, which raised \$9,100 in advertising revenue, exceeding the sales goal. The Membership Department was heavily involved in producing the membership listings for CVALCO's Official Lane County Oregon Visitor Guide and CVALCO's Meeting & Event Planner. In May 2004, an outside publishing company began ad sales for the new Meeting & Event Planner. The vice president of membership was also the coordinator for the publication of this piece. Production costs of the pad map, inserted into the Visitor Guide, were covered by a membership-listing fee for the first time this year. A total of \$8,700 in revenue was generated to produce the map.

Development of on-demand printed pieces have continued to be a part of the Membership Department. These pieces provide customers and staff with current membership information.

Labels /Leads

CVALCO's label program allowed members to purchase information request leads to use when sending out their promotional materials to prospective visitors. During FY04, members purchased 3,247 visitor inquiry, relocation, or membership labels, with revenues of more than \$341. There are 31 members that are currently requesting the Convention/Meeting Planner Lead List Service up from 15 the previous year.

Community Relations

Lisa Lawton, Director of Community Relations

The Community Relations program continued to work to inform, educate and maintain open communications with media, business/community groups, government/public officials and local residents to heighten awareness about CVALCO and the positive economic impacts of tourism. Local media continued to use CVALCO as resource and voice for the Lane County visitor industry. During the year, the department also focused work on a variety of new projects, which included the Lane County Tourism Summit, Lane County Photo Contest, the Meeting and Event Planning Expo and Web site development. The department also took over management of two key communication publications.

	FY04	FY03	FY02	FY01	% Change since FY03
Media (local)	\$23,821	\$36,979	\$42,035	\$36,705	↓35%
Media (national convention)	\$11,188	\$21,699	\$6,948	\$17,815	↓48%
Press Releases	51	53	49	59	↓3.7%
Media stories/articles	112	120	144	151	↓6.6%
Presentations	28	18	30	30	↑5.5%

Local Media Coverage

While media editorial value was down for the fiscal year, CVALCO continued to be a recognizable resource for visitor industry related coverage. The decline was due, in part, to a move to discontinue the Lane County Tourism Trivia contest with local media, valued at \$8,000, and kick-off a first-time Lane County Photo Contest in an effort to increase CVALCO's photo library for promotional usage.

Press releases and media interviews continued to be among the best tools for generating coverage. During the period, CVALCO was a resource to Lane County-based television, radio, newspaper and other business and community publications. Wide-ranging coverage included topics on the economic impacts of conventions and events, visitor spending statistics, the Tourism Investment Proposal (statewide room tax), gas prices, Amtrak Cascades service, Springfield's potential civic center, CVALCO's Meeting and Event Planning Expo, Lane County Events Center/Fairgrounds issues, Lane County Tourism Summit, OSAA sporting event impacts, Oregon's new slogan and news about CVALCO publications, staff and board members.

Convention-Related Media Coverage

Editorial coverage about Lane County's convention-related industry continued to produce a significant amount of free publicity during the year. CVALCO press releases and media assistance to convention publications generated \$11,188 in editorial coverage boosting efforts to promote Lane County as a meeting destination. The decline in hotel renovations and facility development during the year, however, provided fewer opportunities for coverage in publications looking for new development updates.

During the period, the Community Relations Department oversaw the media outreach and advertising for the CVALCO Meeting and Event Planning Expo held in October. Press releases were sent to local and state media, chambers, and regional association newsletters and publications. Advertisements were placed in the Register-Guard and the Eugene Weekly. A sponsorship was secured with KVAL-TV, which provided both discounted advertising rates and in-kind coverage valued at \$700.

Lane County Photo Contest

The Community Relations Department launched the first ever Lane County Photo Contest. CVALCO members partnered with CVALCO by donating more than \$1,000 in prizes for contest winners. Photo entries were submitted in five categories representing all regions of the county. Full-color posters and contest brochure/entry forms were distributed throughout the county, in addition to promotions on CVALCO's Web site. The contest was designed to encourage local amateur photographers to get out explore the county's diverse landmarks, attractions and community activities that make Lane County a wonderful visitor destination. Winning entries will be considered for inclusion in CVALCO's visitor publications. CVALCO also partnered with the University of Oregon's internship program, which allowed for a U of O student to assistance with the project.

CVALCO Cooperative Advertising Campaigns

On-going efforts were made to provide local discounted advertising opportunities for CVALCO and its members to increase awareness about Lane County's visitor industry. CVALCO continued its cooperative television advertising campaign with KMTR-TV for a fifth consecutive year. A newly designed ad campaign promoted Lane County as a visitor destination to a five county region, promoted the positive impacts of Lane County's tourism industry and provided members the opportunity to promote their own businesses at a substantial discounts. In conjunction with this campaign, KMTR-TV donated \$5,800 worth of television airtime in the form of Public Service Announcements.

CVALCO also teamed up with Eugene Weekly for a second year to provide members with the opportunity to advertise year-round at the lowest possible rate. Other advertising opportunities were discussed with other local media including television and radio stations.

The Community Relations Department assisted with the design and content creation of the new CVALCO back-lit display at the Eugene Airport, Lane Events Center and preliminary work on a display at the new Springfield LTD station. The department contributed research and content for the new tourism in-state advertising campaign.

Presentations/Community & Member Outreach

Presentations to business and community groups and the Lane County Board of Commissioners continued to be an effective means of spreading the word about CVALCO and the positive benefits tourism brings to Lane County. CVALCO staff made a total of 28 presentations during the year to various business, civic and educational venues. CVALCO staff also attended and participated in 233 business and community meetings and events throughout the year.

Communication/Publications

The Community Relations Department took over as editor of CVALCO's four-color, quarterly newsletter during the year. The publication is sent out to more than 900 members, public officials and other key business and visitor industry constituents providing information about industry news, CVALCO and its members. During the period, a new graphic designer was selected to replace the former designer who ceased design services. The department also took over the production of CVALCO's Weekly Updates, which are e-mailed to more than 400 members. The updates continued to be an effective way to immediately communicate with members about marketing opportunities and other visitor industry news. The Community Relations Department continued to coordinate and produce the CVALCO's Semi and Annual Reports.

Web Site Development

The Community Relations Department increased focus on improving CVALCO's Web site content.

During the year, 21 feature pages were added to CVALCO's Web site providing visitors with ongoing seasonal sightseeing and activity ideas, and members with information about special CVALCO events and activities. Feature pages highlight CVALCO members and included links to member sites increasing member exposure and information access for Web users. Pages have included features on scenic byways, fall travel ideas, farmers' markets, fishing, winter recreation, whale watching, shopping, sporting events, gardens, the Oregon Skyway gondolas, and special pages featuring the Meeting and Event Planning Expo, the Lane County Tourism Summit, OSAA Championships, and the USA Track and Field Junior Olympics.

Tourism Summit

During the year, the department took part in extensive planning and research for the Tourism Summit of Lane County held in January 2004. The Summit included a presentation about the state of the local tourism industry and the extensive facility development happening on the state and regional level. Public officials and private-sector business leaders joined in the discussion and presentation process, to examine current and future opportunities and the role the County should play in future long-term strategies. As a result, a 12-member Lane County Regional Tourism Infrastructure Strategy Task Force was assembled to identify, analyze and make recommendations about ways to address gaps in tourism infrastructure. The Task Force will present its results to the Lane County Board of Commissioners in January 2005.

Holiday Calendar

The production and release of CVALCO's fourth annual calendar was completed during the period. The calendar featured an image of Heceta Head Lighthouse near Florence. The calendar is sent to CVALCO members, key community groups, public officials, and media representatives.

Administration

Kari Westlund, President & CEO

Stephanie Turner, Director of Finance & Administration

Betty Schmitt, Interim Director of Finance & Administration

Office Systems

CVALCO replaced its central computer network server, upgraded its fire wall and virus protection, and began conversion to updated software, which will continue into next fiscal year. The voice mail system was also replaced. While the investments were substantial, they have been critical to the productivity and efficiency of the association.

Personnel Changes

CVALCO welcomed four full-time employees during the year. Pujita Mayeda joined as an assistant to both the Membership and Visitor Services Departments (replacing Elizabeth Wilde), Kerry Bunnard was hired as a convention sales manager, Meg Trendler was hired as the visitor services manager (replacing Kris Redmond) and Katie Onstad was hired as the tourism sales manager (following the departure of Joanne Holland-Bak). Part-time visitor services staff additions included Janet Auxier and Peggy Price. Due to chronic illness, Stephanie Turner was on medical leave much of the year and Betty Schmitt worked on an as-needed part-time and then later full-time basis to assist us in keeping internal control systems in place and operations running smoothly.

CVALCO Board

Jeff Morton took over as CVALCO Board Chair in July. Other elected members of the executive committee include Libby Tower as vice chair, Chris Otto as treasurer, Mike Gillette and Gary Feldman as at-large members, Mike Drennan as past chair, and Commissioner Bobby Green, Mayor Sid Leiken, and Councilor George Poling as liaisons to Lane County, Springfield, and Eugene. During the year, Jim Ralph, of the Oregon Festival of American Music, joined the CVALCO board.

In-Kind Support

CVALCO received a total of \$47,165 worth of in-kind support from members and community partners, allowing CVALCO to increase its ability to market Lane County. In-kind donations were received in connection with CVALCO's Annual Dinner, CVALCO's cooperative television advertising campaign, newsletter production, promotional items, tourism familiarization tours, Sunset Celebration Weekend, community event booth space for CVALCO's Visitor Van, AAA promotion, the Lane County Photo Contest and the Meeting and Event Planning Expo.

CVALCO interns from the University of Oregon, Northwest Christian College, Sheldon High School and various volunteers contributed 2,053 hours of donated labor, up 110 percent over last year. Assuming a \$9 per hour pay rate, this labor is valued at \$18,477.

Industry and Community Leadership

Kari Westlund was appointed to the Oregon Tourism Commission (OTC) and immediately became actively involved in the restructuring of the staffing and programs of the OTC as it prepared to implement the funding from the new statewide room tax. Westlund focused in on internal operating systems of the OTC, revisions of the two-year marketing plan, and the structuring of the regional revenue sharing programs allowed under the legislation.

Westlund remains on the board of the Western Association of Convention & Visitors Bureaus as a past president, helping to guide the educational programs offered to bureaus in the western United States and Canada.

Westlund serves as a liaison between the OTC and the Oregon Association of Convention & Visitors Bureaus (OACVB), sitting in on all board meetings and discussions of OACVB.

Westlund also serves on a variety of cultural and economic development committees in Lane County and is engaged in a variety of policy, planning, and marketing discussions relating to tourism and Lane County communities. Other CVALCO staff members are also actively involved in a variety of community and industry issues, contributing to the well being of the industry and Lane County communities.

Footnotes & Sources

1. See Overall Returns under Formulas: \$19.7 million from convention sales bookings; \$5.6 million from inquiry generation and related visitor guide/mail fulfillment; \$1.6 million from visitor center operations; \$3.5 million from mobile visitor van operations; \$826,217 from group tours; and \$2.4 million from bulk brochure distribution. No economic returns from trade shows, international sales efforts, Web site visits or film and video are included.
2. Lane County Travel Impacts 1991-2003p. Prepared by Dean Runyan Associates, February 2004, for CVALCO.
3. Ibid.
4. Oregon Travel Impacts and Visitor Volume, prepared by Dean Runyan Associates, January 2004, for the Oregon Tourism Commission.
5. Travel Industry of America 2002 Report.
6. Eugene Airport Manager's monthly reports.
7. \$5.6 million in inquiry generation and related fulfillment and \$2.4 million in bulk brochure distribution.
8. Based on GMA Research; 6,307 passengers at \$131 per person, per trip.
9. Lane County Travel Impacts, 1991-2003p, Dean Runyan Associates.
10. Research by the Oregon Tourism Commission and StoryCo has shown that 60% of visitors to Oregon are influenced to visit additional destinations due to visitor guides and promotional materials they pick up in visitor information centers. CVALCO distributed over 18,640 brochures and guides to visitor information centers. Using the 60% factor, the average party expenditure of \$217 per day, identified in the visitor profiles above, total economic impact is \$2,426,928.

Formulas

Overall Returns: \$19.7 million (convention delegate spending); \$5,662,888 (tourism inquiries/fulfillment); \$1,658,531 (visitor information center operations); \$3,518,872 (mobile van operations); \$2,426,928 (bulk brochure distribution); \$826,217 (partial group tour impacts). Total: \$33,793,436

Convention Sales Bookings: Based on an International Association of Convention and Visitor Bureau formula, economic impact is determined by multiplying number of delegates by number of days of the event by \$166, the average daily expenditure amount estimated for this area. Economic impact estimated at \$19.7.

Inquiry Generation: GMA Research identified an overall conversion rate of 31 percent. 67.5% of those are true conversions of people who would not otherwise have visited. In addition, 10% of visitors receiving CVALCO's visitor guide extended their stay by an average of 1.8 days. $55,023 \text{ inquiries} \times 31\% = 17,057 \text{ visitor parties}$ $\times 67.5\% \text{ true conversions} = 11,513 \text{ parties}$ $\times \$434 \text{ per party} = \$4,996,642$. $17,057 \text{ visitor parties} \times 10\% \times 1.8 \text{ days} \times \$217 = \$666,246$. The average party spent \$434 per group per trip (including transportation), \$217 per group per day. Total economic impact: \$5,662,888.

Visitor Information Center Operations and Mobile Visitor Van Operations: Based on research by the Salem Convention & Visitors Association, CVALCO estimates facilitating a one-day extension for

walk-in visitors. The visitor center served 7,643 visitors at \$217 per day per group for a total of \$1,658,531. The Mobile Visitor Van served 16,216 visitors for a total of \$3,518,872.

Group Tours: CVALCO is active in this market segment, and provides planning assistance and sales promotion efforts to many group tour leaders each year. CVALCO relies on voluntary reports from lodging establishments, attractions and restaurants. Based on GMA Research, CVALCO was able to identify 6,307 passengers at \$131 per person, per trip for a total economic impact of \$826,217.

Media: CVALCO has been directly or indirectly responsible for print, broadcast and film exposure of Lane County, but has limited tracking ability. Traceable media coverage generated from CVALCO's national/international efforts on the leisure side was valued at \$1,417,911. National convention-related coverage was valued at \$11,188. National/international coverage included destination promotion content. Lane County-based media coverage totaled \$23,821. This included coverage about CVALCO and CVALCO-generated coverage about Lane County's visitor industry. Total coverage was valued at \$1,452,920.

Bulk Brochure Distribution: Research by the Oregon Tourism Commission and StoryCo has shown that 60% of visitors to Oregon are influenced to visit additional destinations due to visitor guides and promotional materials they pick up in visitor information centers. CVALCO distributed over 9,455 Lane County Visitor Guides and 9,185 promotional brochures to welcome centers and visitor information centers during the year. Using the 60% factor, and the average party expenditure of \$217 per day identified in the visitor profiles mentioned above, the economic impact totaled \$2,426,928.

CVALCO Web site: No estimates on economic returns from CVALCO's investment in its Web site are included in this report because no baseline statistics from credible research exist. In FY04 there were 125,026 unique visitors* to CVALCO's site. If conversion figures from traditional inquiries were used, the economic impact would be estimated at \$12,195,222. The formula would be: $125,026 * 31\% = 38,758$ * 67.5% (true conversions) = 26,162 * \$434 (per party, per trip) = \$11,354,173. $38,758 * 10\%$ (visitors extending stay) * \$217 = \$841,049. Adding these two, the economic return would be estimated at \$12,195,222.

**Unique Visitors – A unique visitor is only counted the first time a visitor enters CVALCO's site each month, providing a more accurate tracking method.*