



Who, Where, Why and When?

For Just a Little Money

Background

Some Basic Questions:

- Who visits here?
- Where do they live?
- When do they visit?
- Why do they visit?

Answer:

- Dunno.



Lodging Partnerships: Zip Code Source of Residency



Research

Background

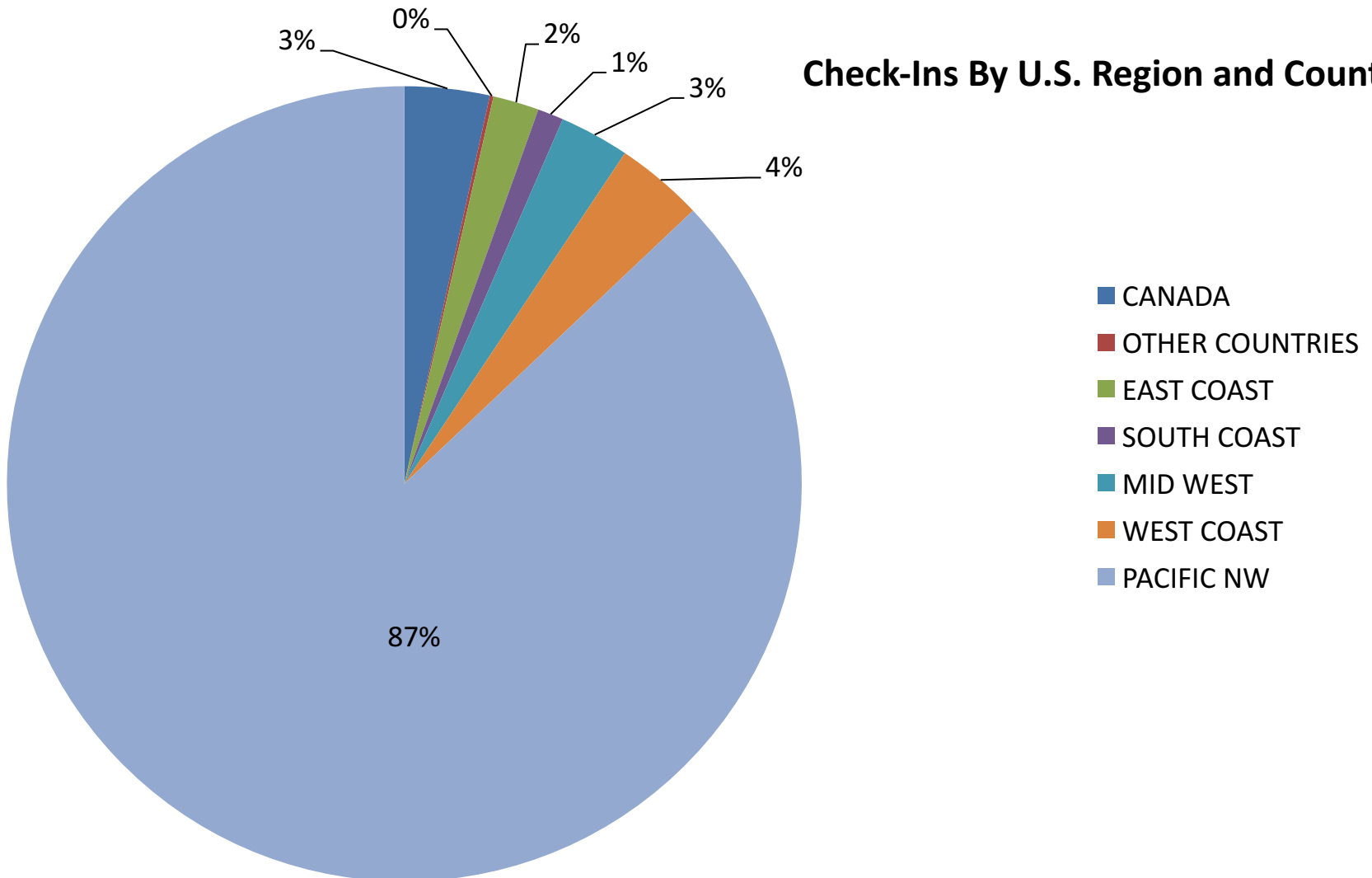
- Obtained zip code data by month for calendar year 2014 from 12 Lincoln City lodging properties
- 59,000 check-ins total

AC	AD	AE	AF	AG	December
		November			
993		Amity			
92037	OR	973	Or	971	Salem
97013	wa	97054	OR	97113	Aloha
97119	OR	97267	Or	97038	Corvallis
59820	CA	96088	OR	97756	Portland
97110	Or	97002	Or	97056	Yamhill
97128	OR	97015	OR		
97030	OR	97439	Or		
99336	Or	97116	Or		
92049	OR	97123	Or		
97201	Wa	98387	OR		
99352	OR	97383	Or		
97112	Wa	97383	OR		
97070	OR	98631	wa		
97112	OR	97110	OR		
97301	Australia	97380	Or		
59101	Keizer	97003	Canada		
98901	Ridgefield	99501	Or		
44060	Saint	97307	Id		
59715	Bellingham	97307	OR		
94533	Spokane Valley	98642	OR		
97401	Springfield	97051	Or		
89408	WoodBurn	98225	OR		
97016	Dallas	99206	Or		
97850	Elimira	97477	OR		
97002	Gaston	97071	Co		
98632	Gresham	97071	OR		
99350	Rickreal	97338	Wa		
7071	Sandy	97437	OR		
7068	Tigard	97119	ID		
148	Vancouver	97030	OR		
057	Rexburg	97371	OR		
		97055	Or		
		97223	OR		

Zip Codes

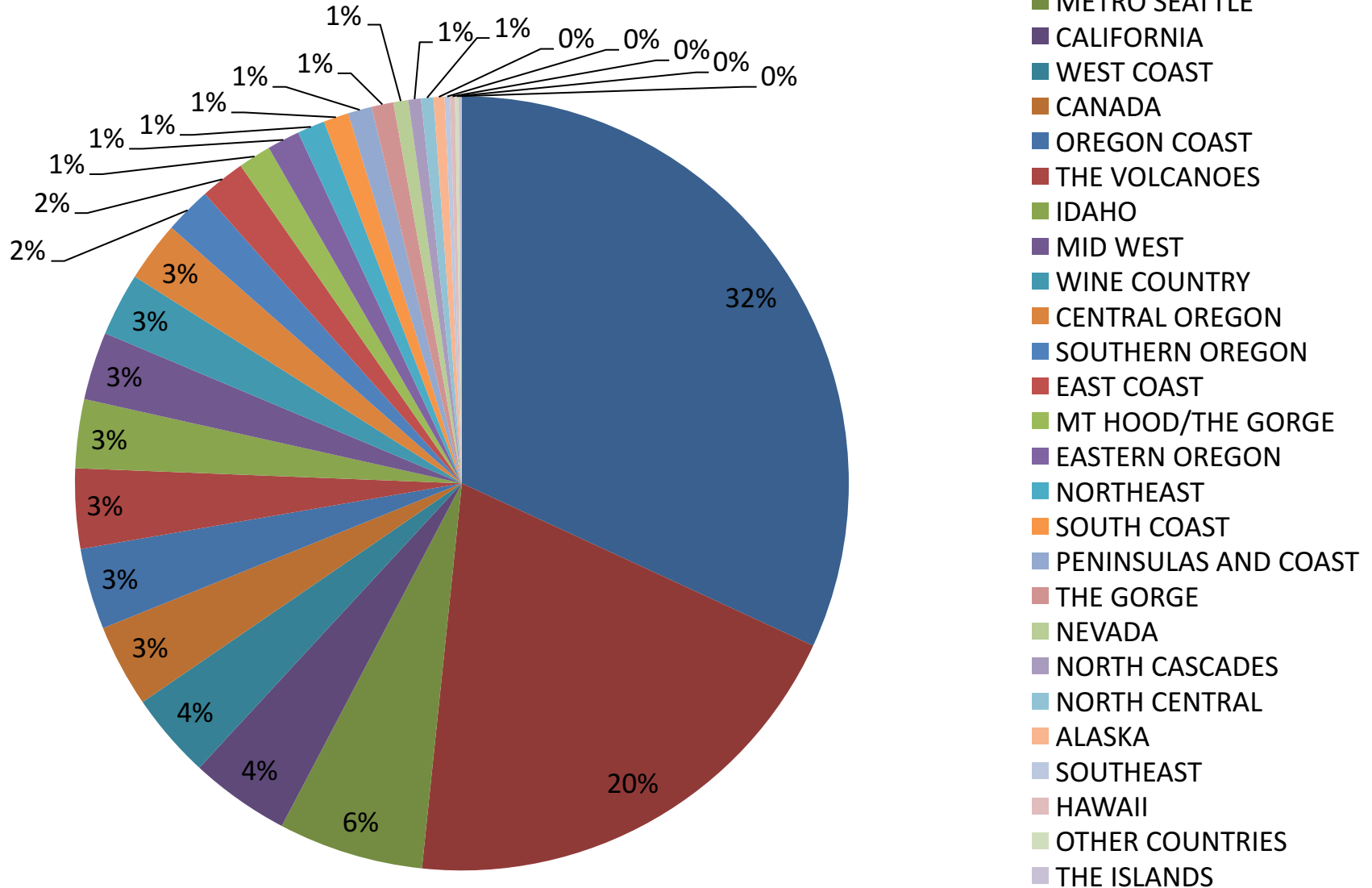
Where are our visitors from?

Check-Ins By U.S. Region and Country



Zip Codes

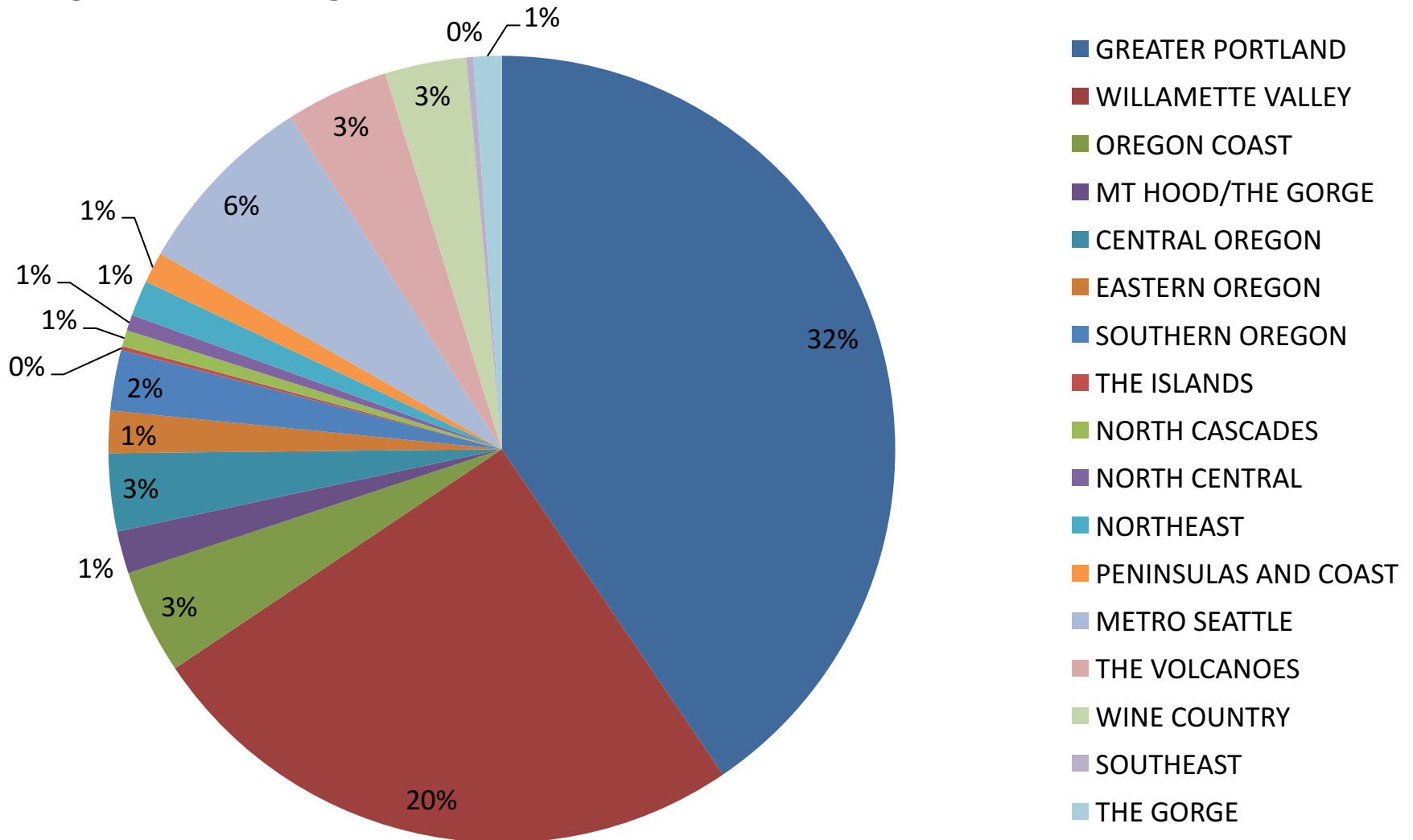
Where are our visitors from?



Zip Codes

Where are our visitors from?

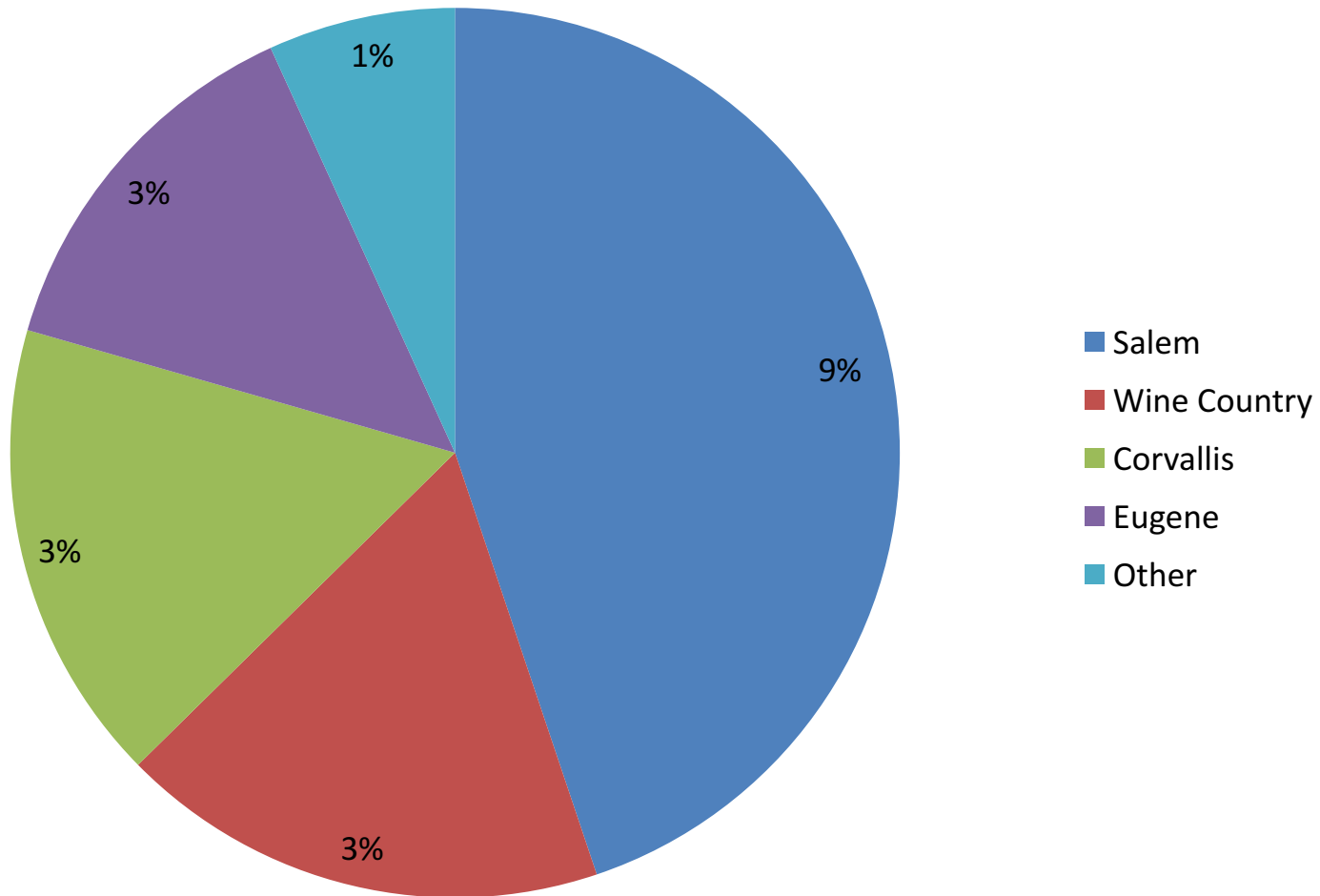
Oregon and Washington State



Zip Codes

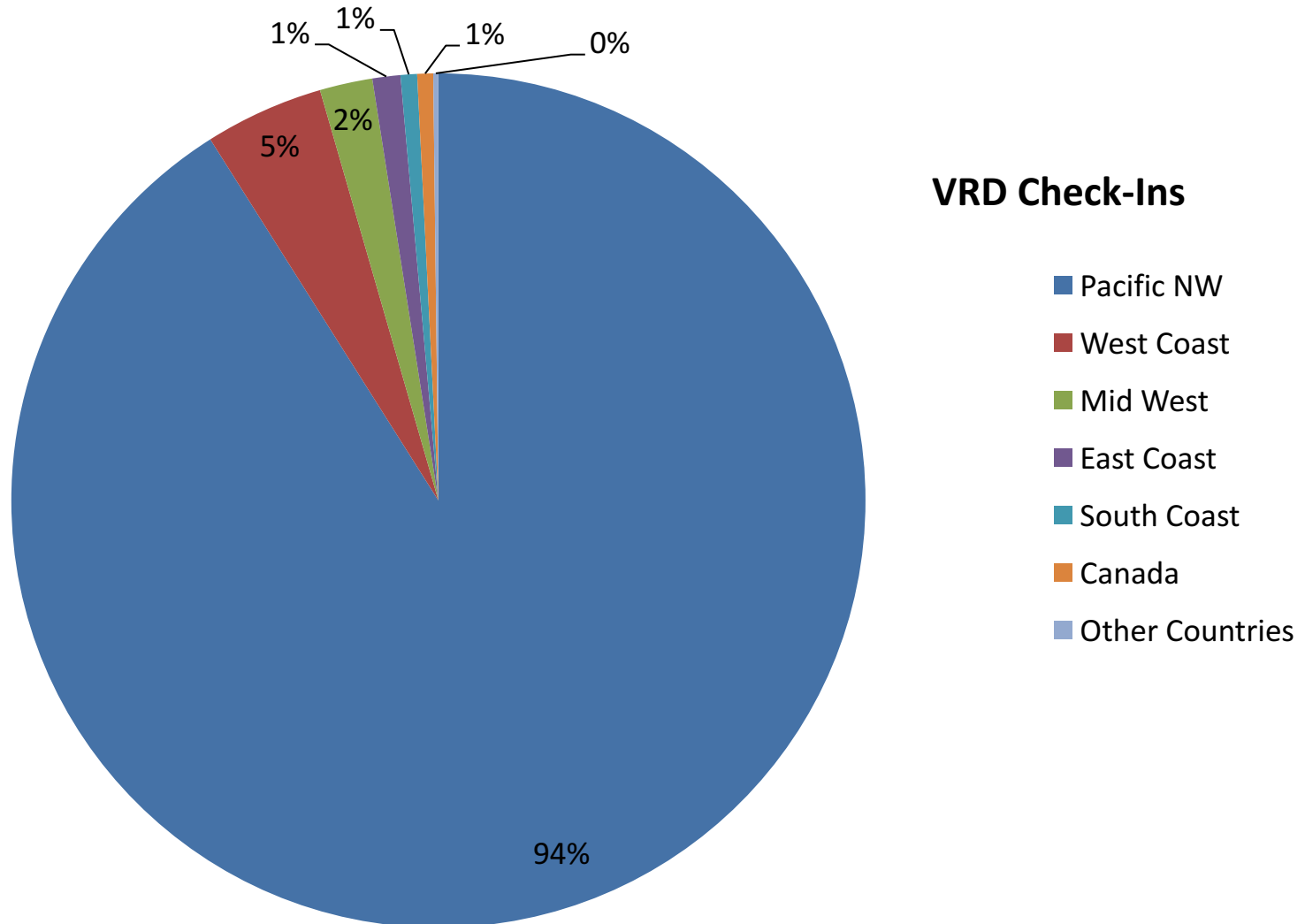
Where are our visitors from?

Willamette Valley Breakout



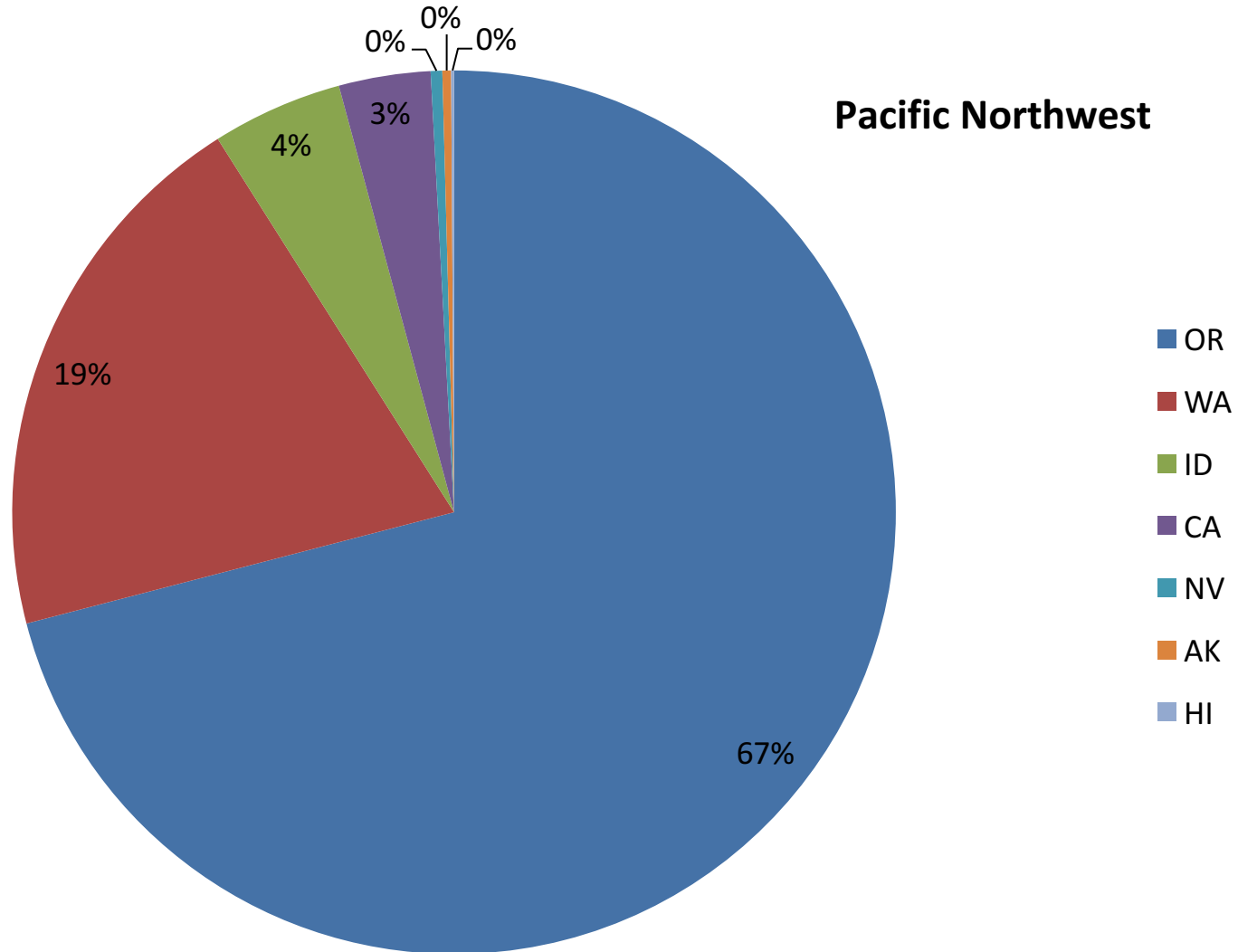
Zip Codes

Are VRDs Different?



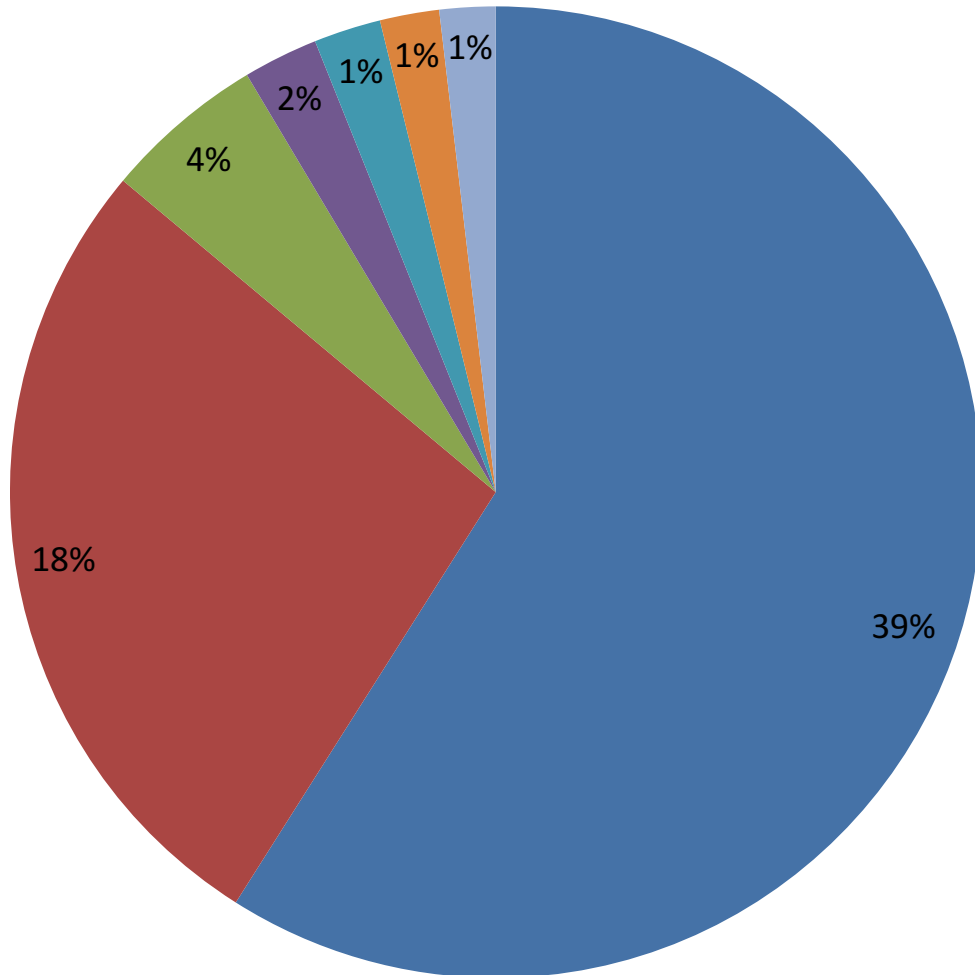
Zip Codes

Are VRDs Different?



Zip Codes

Are VRDs Different?



VRD Check-Ins

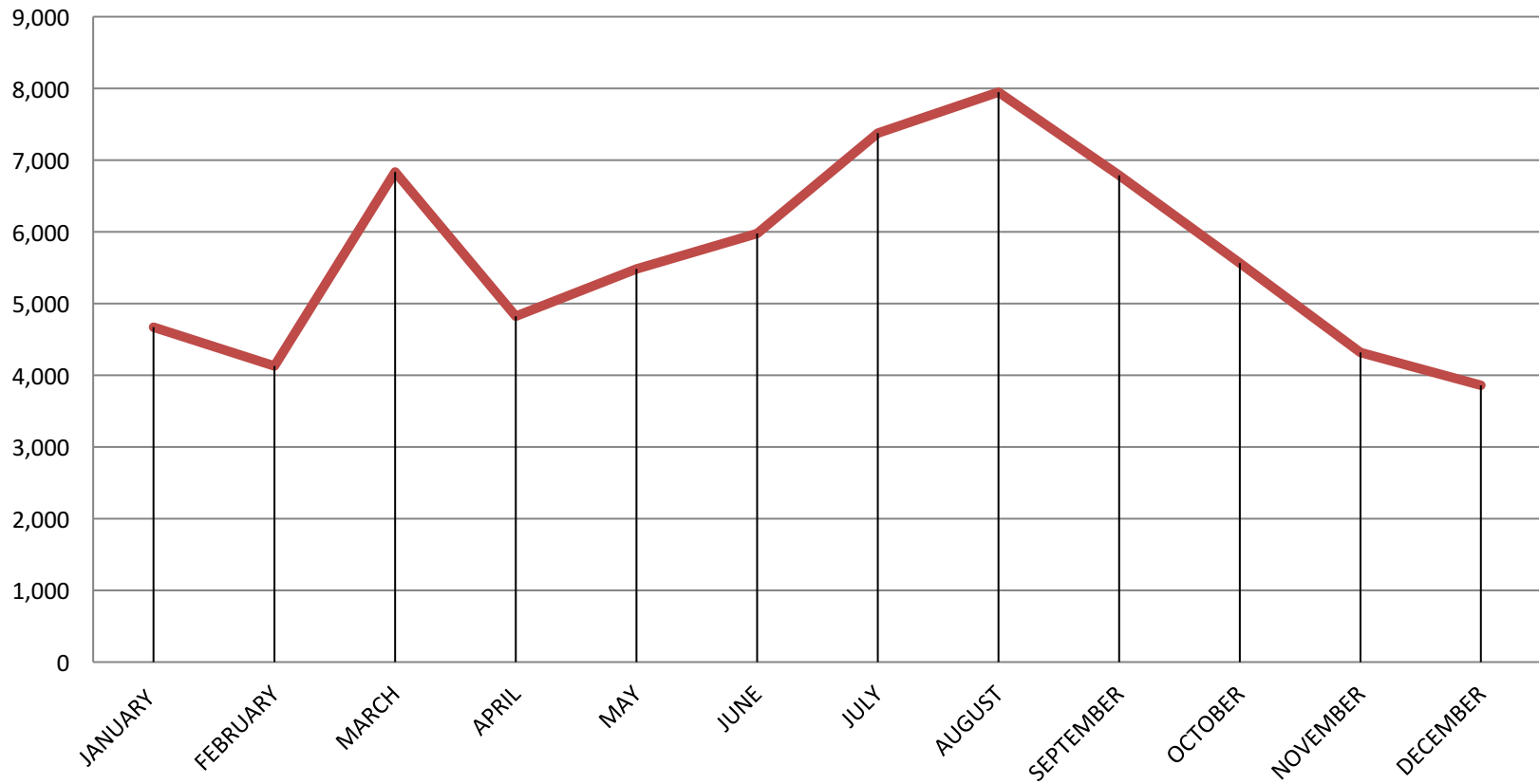
- Greater Portland (includes Vancouver, WA)
- Willamette Valley
- Central Oregon
- Eastern Oregon
- Oregon Coast
- Mt. Hood/The Gorge
- Southern Oregon

Vs. Portland at 32% and
the Valley at 20% overall

Zip Codes

When are they visiting?

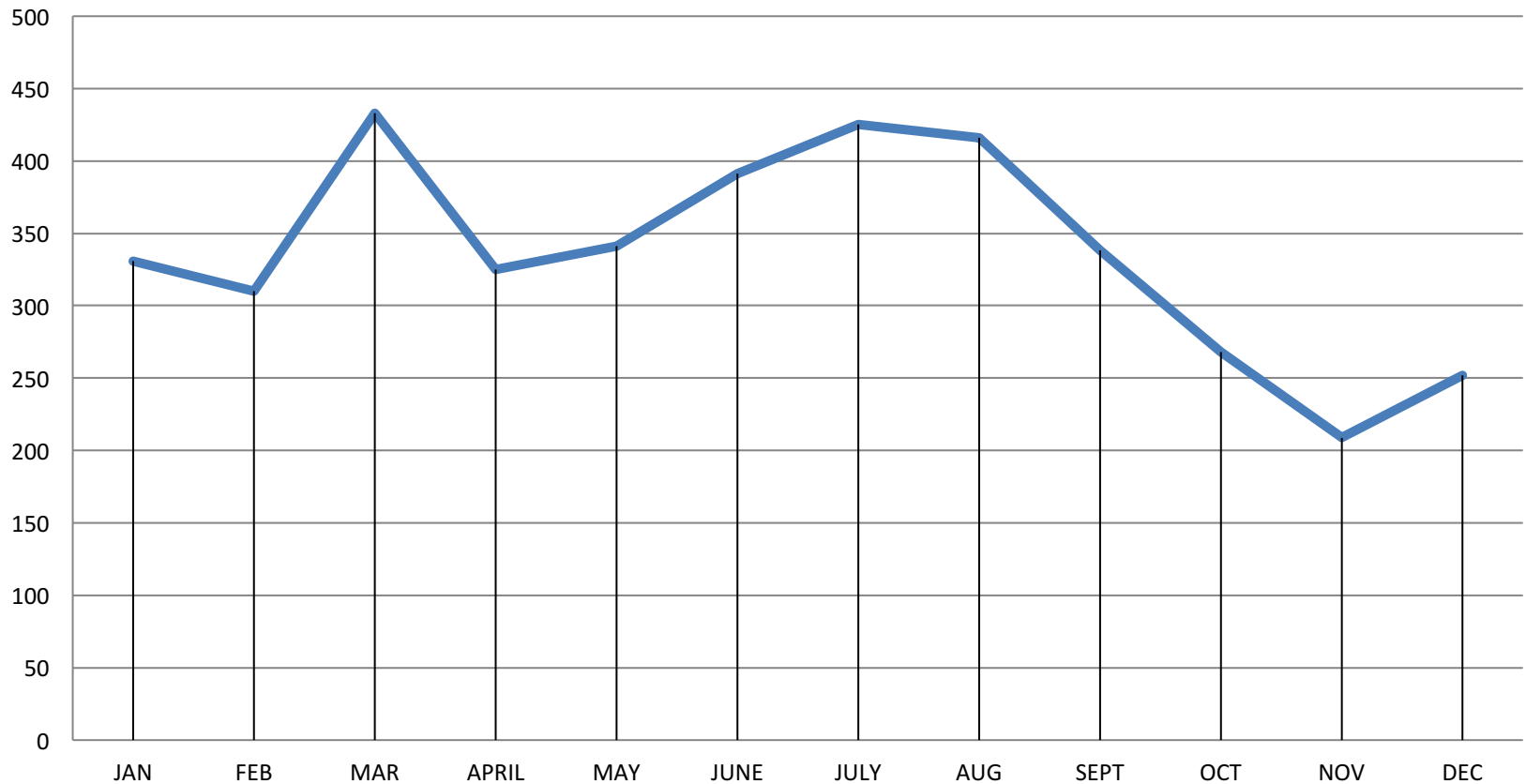
2014 Check-ins



Zip Codes

Are VRDs Different?

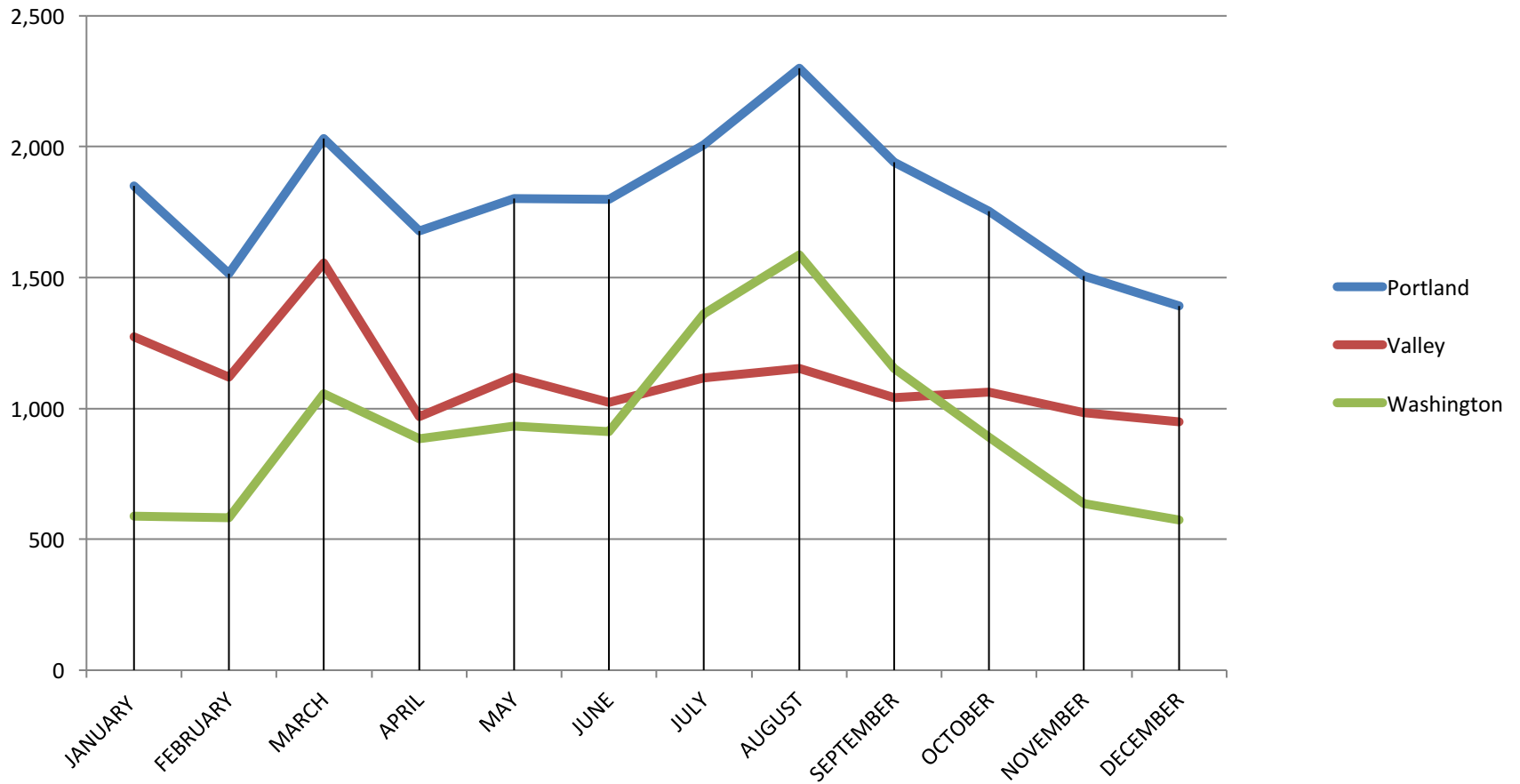
2014 VRD Check-ins



Zip Codes

When are they visiting?

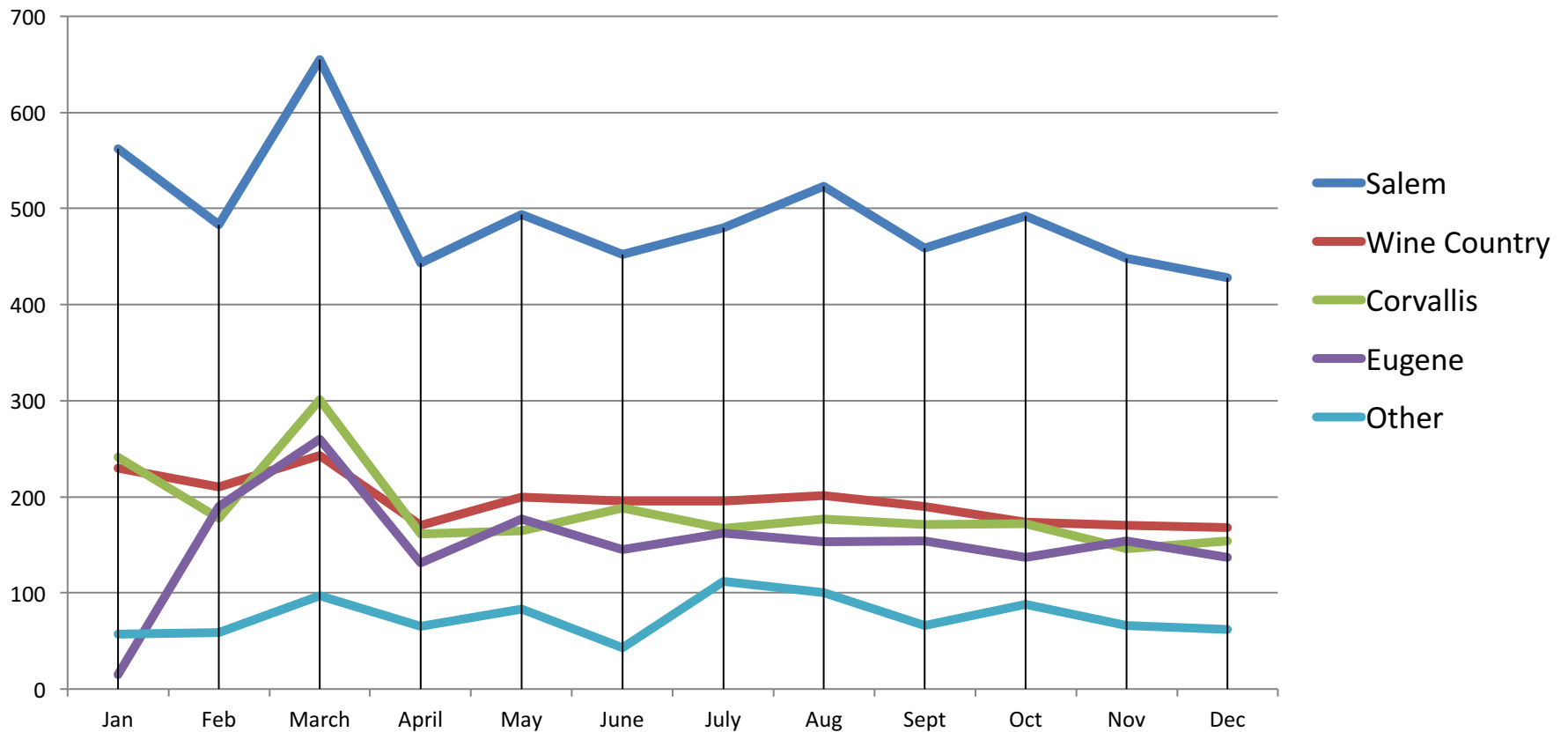
Check-ins by Month
2014



Zip Codes

When are they visiting?

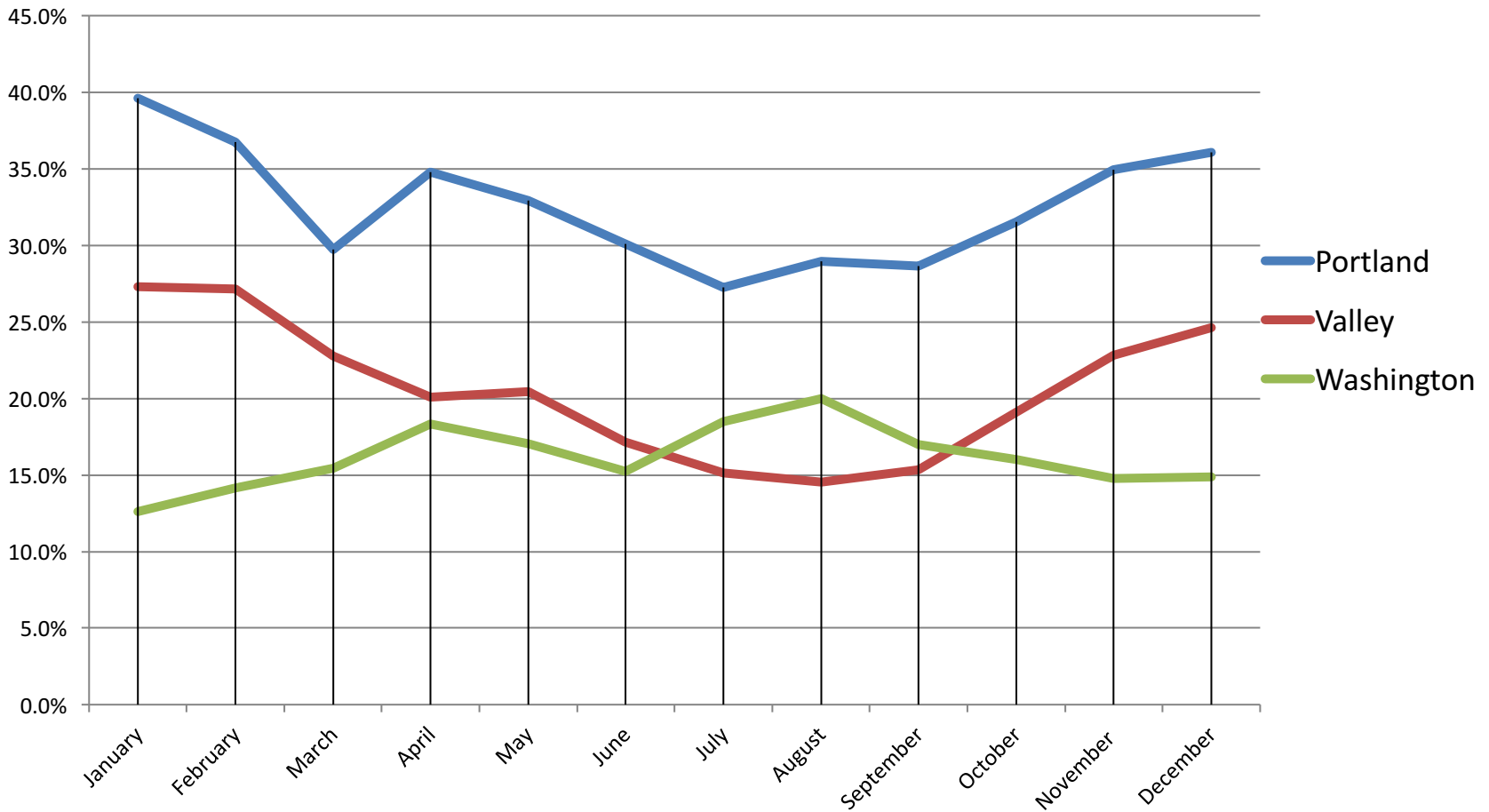
Willamette Valley Seasonality



Zip Codes

When are they visiting?

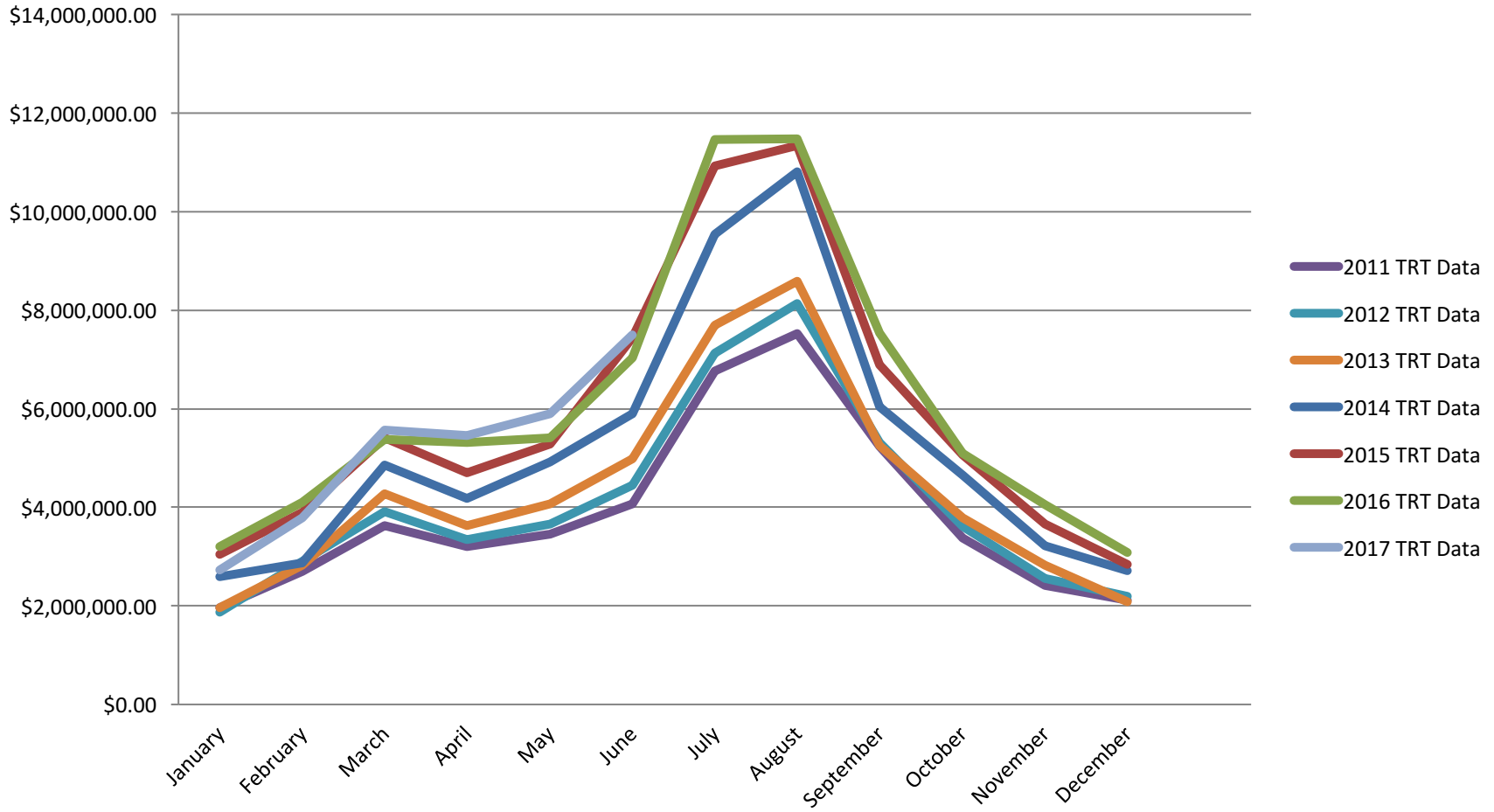
Seasonality by Share of Check-Ins



Zip Codes

When are they visiting?

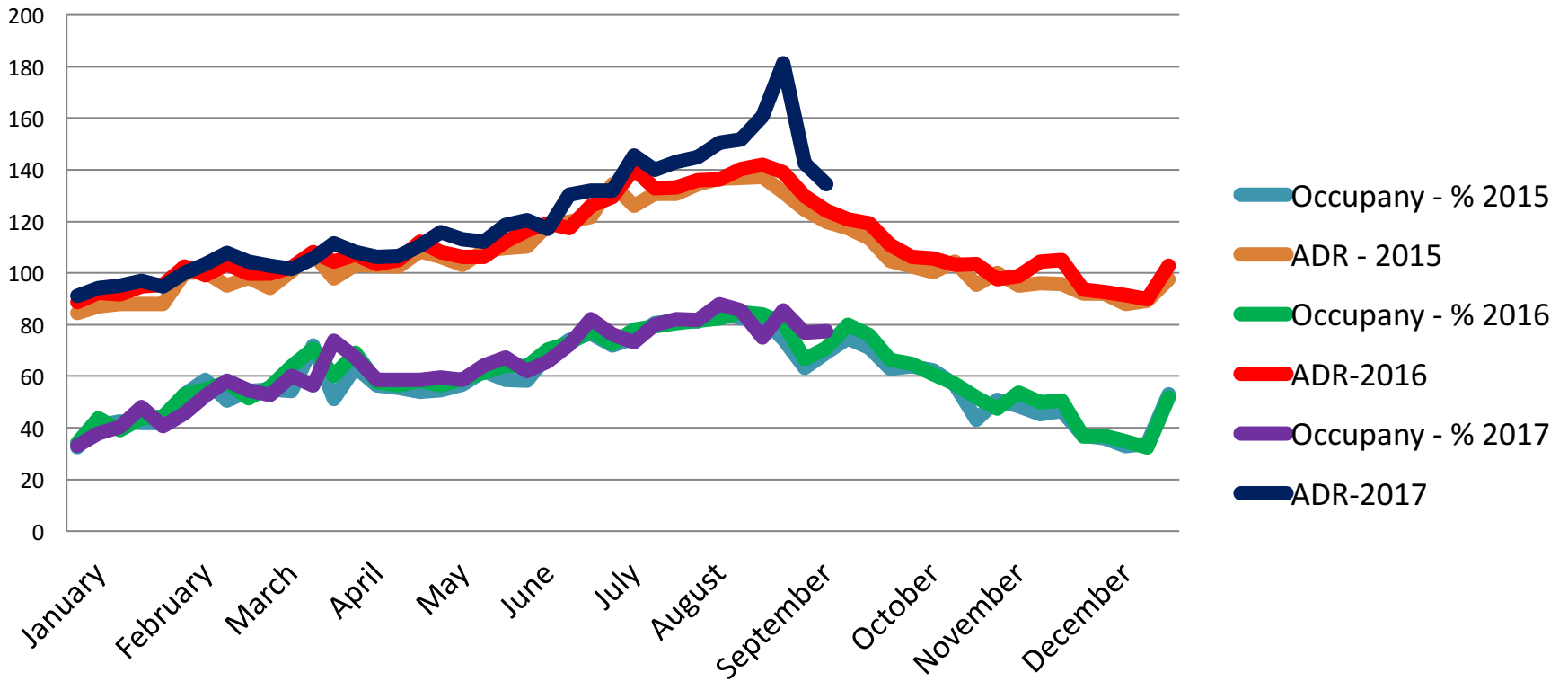
TRT 2011-2017



Zip Codes

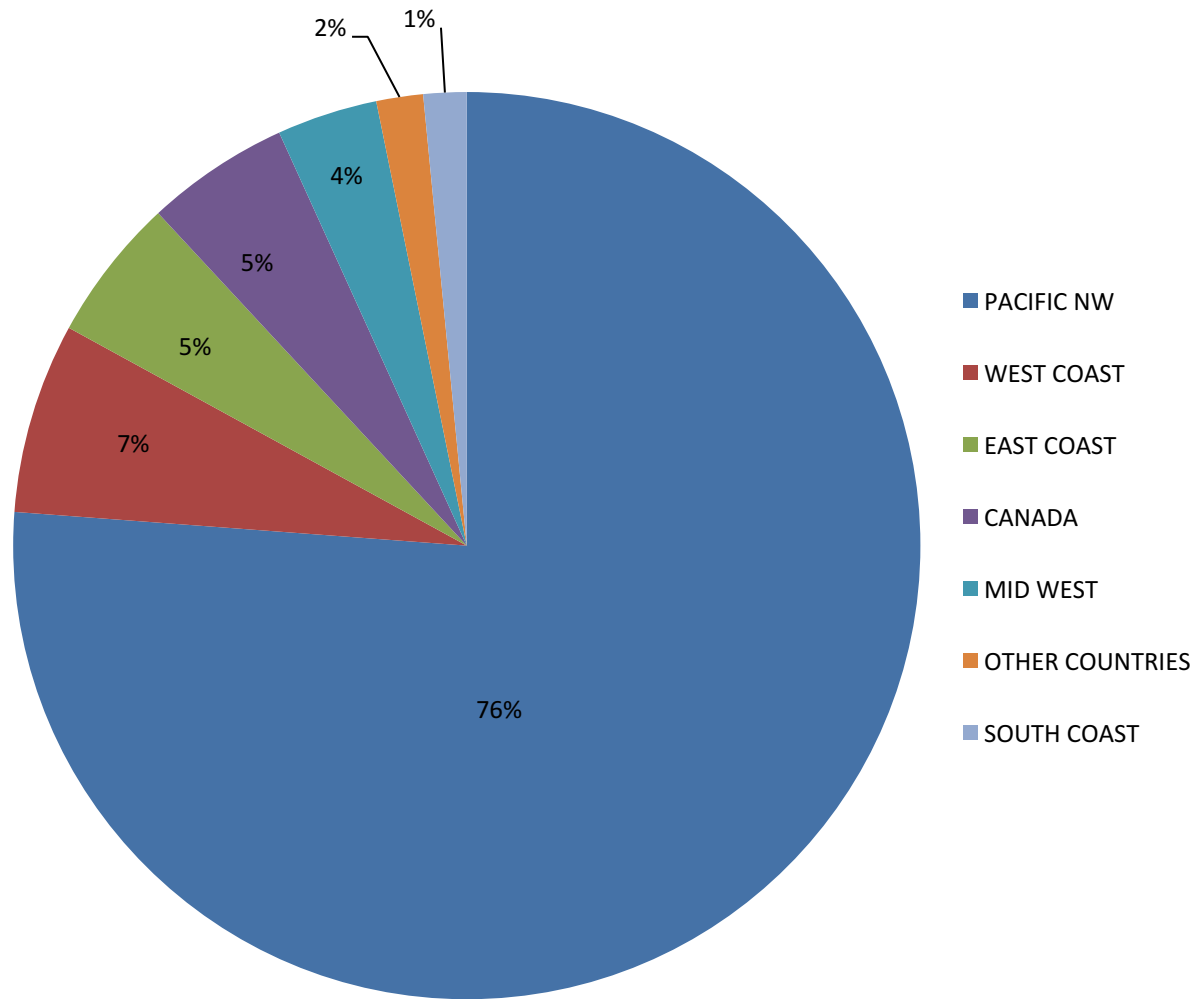
STR Report

Occupancy/ADR 2015-2017



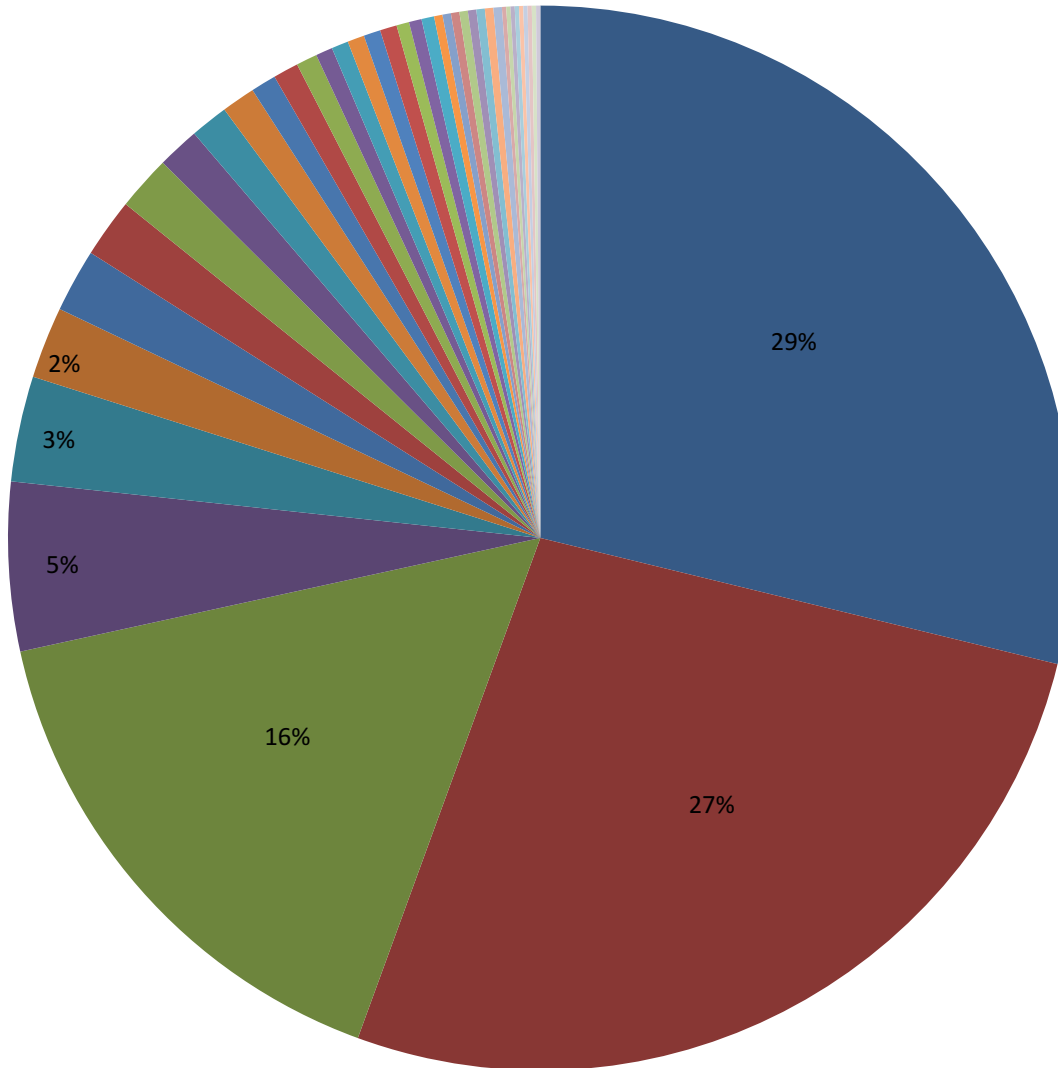
Zip Codes

2017 ECLIPSE ZIP CODES



Zip Codes

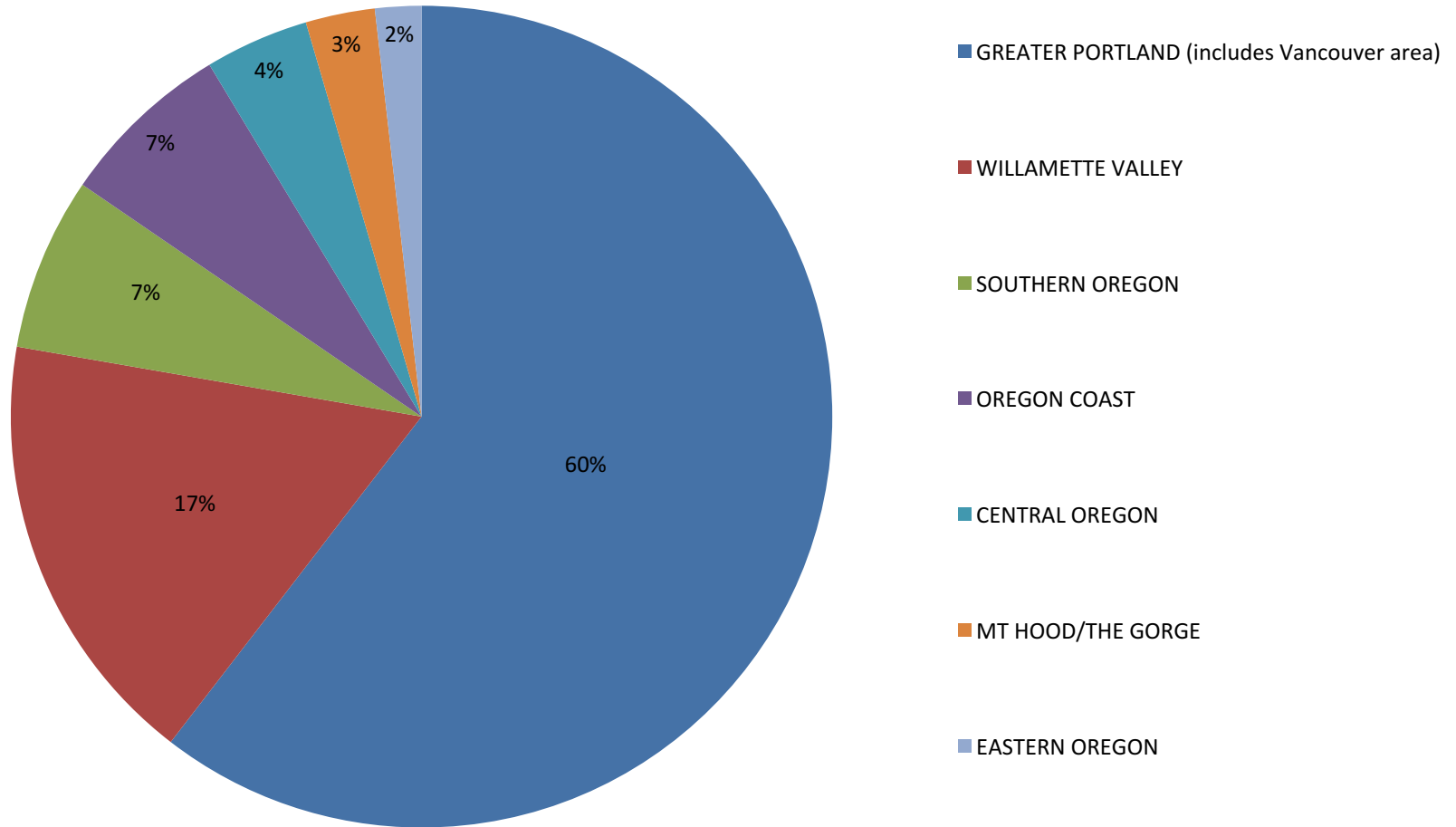
2017 ECLIPSE ZIP CODES



- WASHINGTON
- OREGON
- CALIFORNIA
- CANADA
- IDAHO
- UTAH
- ARIZONA
- TEXAS
- OTHER
- MONTANA
- NEW YORK
- COLORADO
- FLORIDA
- VIRGINIA
- NEW JERSEY
- HAWAII
- MINNESOTA
- ALASKA
- PENNSYLVANIA
- MASSACHUSETTS
- MICHIGAN
- OHIO
- NEVADA
- ILLINOIS
- KANSAS
- MARYLAND
- MISSOURI
- NEW MEXICO
- OKLAHOMA
- SOUTH DAKOTA
- GEORGIA
- CONNECTICUT
- DELEWARE
- NORTH DAKOTA
- WISCONSIN
- TENNESSEE
- INDIANA
- NORTH CAROLINA
- LOUISIANA
- KENTUCKY

Zip Codes

ECLIPSE OREGON BREAKDOWN



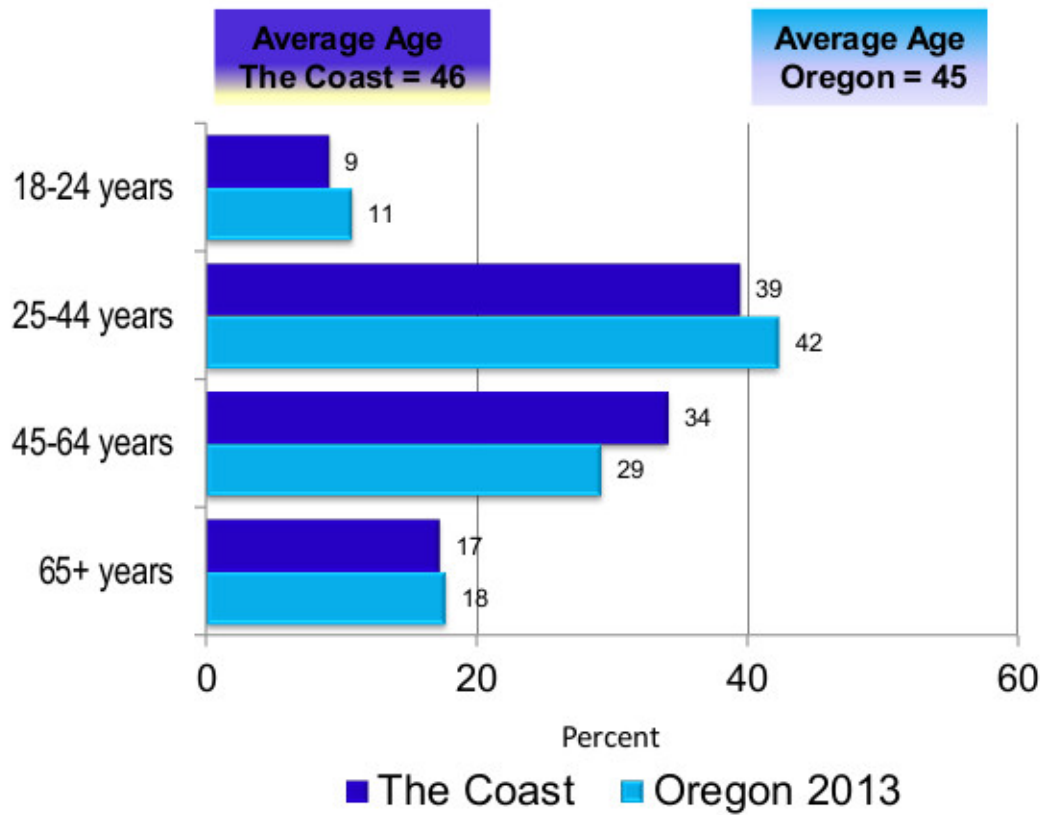
Zip Codes

What We Still Need to Learn

Demographics

Who is visiting? – Guest Age

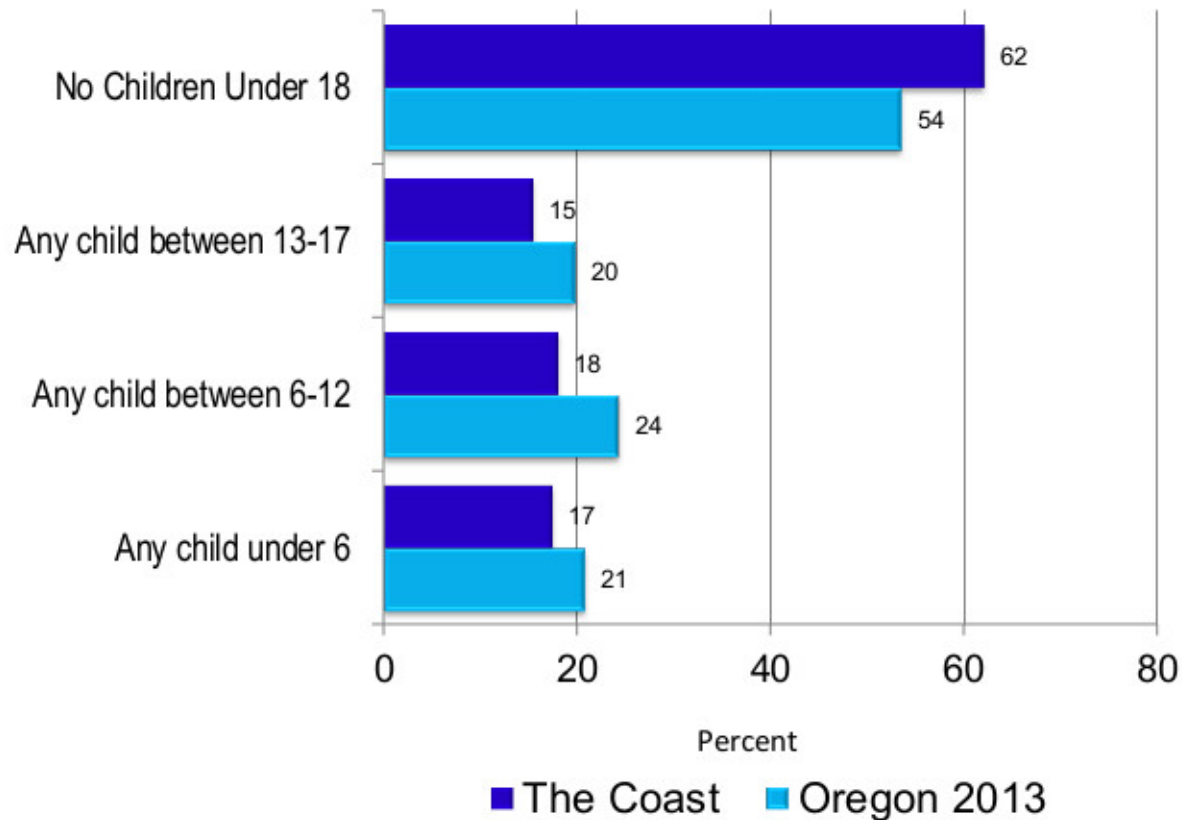
Base: Overnight Marketable Trips



Demographics

Who is visiting? – Children in Household

Base: Overnight Marketable Trips



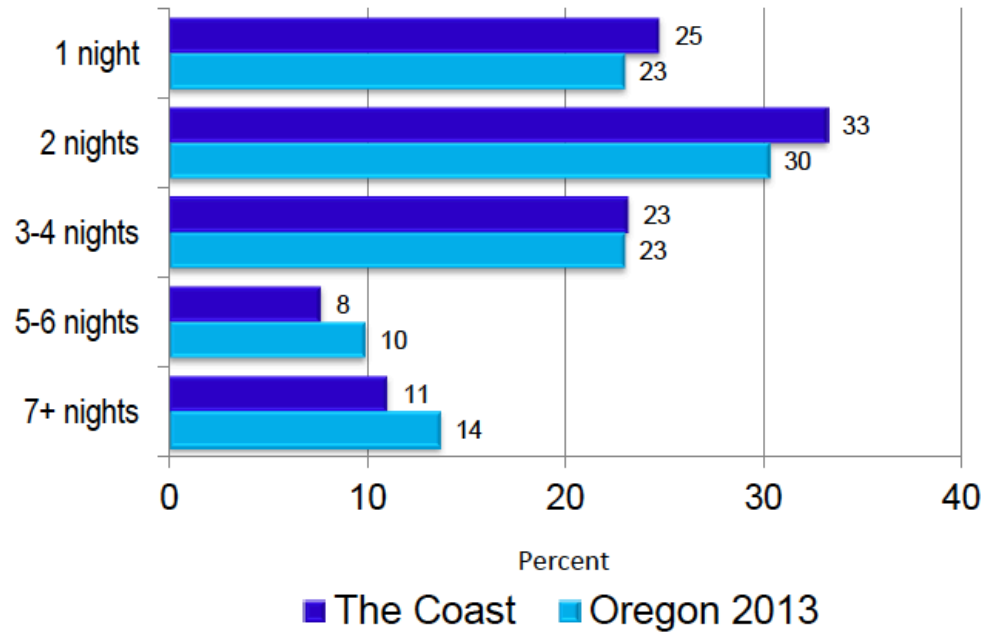
Demographics

Who is visiting? – Length of Stay

Base: Overnight Marketable Trips

**Average
Coast Region
= 3.3 Nights**

**Average
Oregon
= 3.9 Nights**



Demographics

Comparisons to Coast Region Research

- **Demographics of *Lincoln City* Focus Group Participants**

- Age Group: 39-44 & 45-64 (primary)
- Gender: 60% Female, 40% Male
- Household Income: Under \$100K
- Marital Status: Married/Partner
- Children: 68% had none under 18
- Visits per Year: 2-3
- Overnights During Stay: 2-3
- Accommodations: Hotel/Motel
- Travel Party Size: 2
- Reason For Travel: Leisure
- Method of Planning: Internet

- **Demographics of *Travel Oregon* Research**

- Age Group: 39-44 (primary) & 45-64
- Gender: 57% Female, 43% Male
- Household Income: Under \$100K
- Marital Status: Married/Partner
- Children: 62% had none under 18
- Visits per Year: N/A
- Overnights During Stay: 2-3
- Accommodations: Hotel/Motel
- Travel Party Size: 2
- Reason For Travel: Leisure
- Method of Planning: Internet

Conclusions

- **High Potential Growth Markets**
 - Primary Market: Greater Portland Area (Including Vancouver, WA)
 - 1/3 of our overnight visitors, minimal daytrippers
 - Secondary Market: Willamette Valley
 - 20% of guests, propensity to summer day trip
 - Present offers requiring overnight stays
 - Concentrate on shoulder seasons
 - Return Visitation: Focus group study demonstrated a strong propensity for return trips
 - Invest in destination experience

Conclusions

- **Potential Markets for Growth**
 - Reach the balance of Pacific Northwest markets efficiently via regional media, PR and social media
 - 1859 Magazine
 - Northwest Travel & Life
 - Do not renew marketing efforts in Seattle and Idaho
 - Seattle, 6% of visitation coupled with high media costs
 - Idaho, 3% of visitation, easy to reach via Boise media
 - Consider eventual test market programs, but not until core markets have been addressed



**Another Lodging Partnership:
Focus Groups**

Background

- Twenty-four positioning statements
- A moderator's guide to ensure consistency
- Gift certificates to local restaurants as participation incentives

Where You Discover Treasures



"Lincoln City is the beach where you discover treasures. Glass floats are hidden along the beach for you to find. Beachcombers come across agates and fossils. Kids find amazing marine life in tidal pools. Antique lovers spot prizes from another time. Hikers discover little known trails with spectacular views. Live music and classic movies are here to be found. Guests are amazed by not just the ocean, but also 350-acre Devils Lake. Boating, stand-up paddle boards, wildlife, city and state parks. Lincoln City contains more treasures than any other city along the Oregon coast."

Background

The World's Largest Air Conditioner



"When it's hot and unpleasant at home, there is just one place to go: Lincoln City.

Background

- Six focus groups conducted from August 16th through October 3rd, 2015:
 - Cultural Center (Farmer's Market) – 8/16
 - Chinook Winds Casino Resort – 8/28
 - Pelican Shores Inn – 9/5
 - Inn at Spanish Head – 9/10
 - Shearwater Inn – 9/18
 - Looking Glass Inn – 10/3



Background

- **Demographics of Respondents**
 - Primary Age Group: 45-64
 - Gender: 60% Female, 40% Male
 - Household Income: Under \$100K
 - Marital Status: Married/Partner
 - Children: 68% had no children under 18
 - Visits per Year: 2-3
 - Overnights During Stay: 2-3
 - Accommodations: Hotel/Motel
 - Travel Party Size: 2
 - Reason For Travel: Leisure
 - Method of Planning: Internet
 - City of Origin: 50+ miles away



Background

- **Moderator's Guide Overview**
 - Introductions and general discussion on travel
 - Impressions of Lincoln City
 - Position statements exercise
 - Sort 24 concept boards into a "Top 2" and a small group of runner-ups
 - Additions or changes that would make Lincoln City a better destination



Results

	Cultural Center	Chinook Winds	Pelican Shores	Spanish Head	Shearwater Inn	Looking Glass Inn	# of times in Top 5	# of times in Top 2
Zen Zone		x		x	x	x	4	3
Where You Discover Treasures	x		x			x	3	2
Amazing Outdoor Adventures	x		x	x			3	2
Seven Miles of Smiles*			x	x		x	3	1
Center of It All	x	x		x			3	
Family Beach Vacation	x	x				x	3	
Glass Float Capital of the World	x		x				2	
Kite Flying Capital of the World			x			x	2	1
Pacific Coast Scenic Byway Beach			x		x		2	1
The Place to Watch					x	x	2	
World's Largest Air Conditioner	x	x					2	
Always Never the Same	x						1	
Beach for Celebrations					x		1	
Culinary Capital of the Oregon Coast					x		1	1
Down to Earth Beach Vacation					x		1	
The Beach With a Lake		x					1	
Vegas With a Beach		x					1	1
Small Town Friendly Beach							0	
Big City Shopping, Small Town Charm							0	
A Great Place to Try New Things							0	
The Quirky Coast							0	
Live Beach Music Scene							0	
Coollest Retro Beach Town							0	
A Real Beach Town							0	

* Miles of Smiles concept board only available at 4 of 6 groups

Results

What we *are*:

Zen Zone
Where You Discover Treasures
Amazing Outdoor Adventures
Seven Miles of Smiles*

* Smiles of Smiles concept board only available at 4 of 6 groups

Conclusion: Lincoln City is a relaxing destination with pleasant surprises for those who look. We are surrounded by natural beauty and have a full seven miles of beach to explore.

Results

What we *are not*:

Small Town Friendly Beach
Big City Shopping, Small Town Charm
A Great Place to Try New Things
The Quirky Coast
Live Beach Music Scene
Coolest Retro Beach Town
A Real Beach Town

Conclusion: Lincoln City is not a small town. We have an outlet mall, but not big city shopping. People are here to relax, not try new things. We're not known for nightlife. We're not seen as a nostalgic (or cool) old-fashioned beach town.

Results

We are many other things to many people:

Center of It All

Family Beach Vacation

Glass Float Capital of the World

Kite Flying Capital of the World

Pacific Coast Scenic Byway Beach

The Place to Watch

World's Largest Air Conditioner

Always Never the Same

Beach for Celebrations

Culinary Capital of the Oregon Coast

Down to Earth Beach Vacation

The Beach With a Lake

Vegas With a Beach

Take II

- **Demographics of Respondents (Summer 2016)**
 - Primary Age Group: 45-64 (strong representation from **25-44**)
 - Gender: 60% Female, 40% Male
 - Household Income: Under \$100K
 - Marital Status: Married/Partner
 - Children: **25%** no children under 18 in HH
 - Visits per Year: **0-1**
 - Overnights During Stay: 2-3
 - Accommodations: Hotel/Motel
 - Travel Party Size: **3.5**
 - Reason For Travel: Leisure
 - Method of Planning: Internet
 - City of Origin: 50+ miles away



Take II

Summer 2016

	Surftides	Cultural Center	Vacation Rental	Chinook Winds	Farmers Market	# of times in Top 5	# of times in Top 2
Center of It All	x	x	x	x	x	5	3
Seven Miles of Smiles	x	x			x	3	3
Where You Discover Treasures			x	x		2	2
Family Beach Vacation	x				x	2	1
Always Never the Same	x					1	0
The Beach With a Lake		x				1	0
Amazing Outdoor Adventures			x			1	0
Vegas With a Beach						0	0
Glass Float Central						0	0
Kite Flying Capital of the World						0	0
Zen Zone						0	0
Beach for Celebrations						0	0
Culinary Capital of the Oregon Coast						0	0
Down to Earth Beach Vacation						0	0
The Beach With a Lake						0	0
The Place to Watch						0	0
World's Largest Air Conditioner						0	0
Pacific Coast Scenic Byway Beach						0	0

Take II

What we *are*:

Center of it All
Seven Miles of Smiles
Where You Discover Treasures
Family Beach Vacation

Conclusion: Lincoln City is a family beach destination with lots to discover, anchored by seven miles of beach, and is a convenient place to explore all the coast has to offer.

Take II

We need an umbrella positioning that encompasses:

- Relaxation
- Seven miles of both beach and town to explore
- Natural beauty
- Finding treasures

Campaign

SEVEN MILES OF *Smiles*



Ocean breezes.
Rhythmic waves.
Seven miles of sandy beach.

Come find your smile!

**Lincoln
City**

OregonCoast.org

SEVEN MILES OF *Smiles*



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Borders
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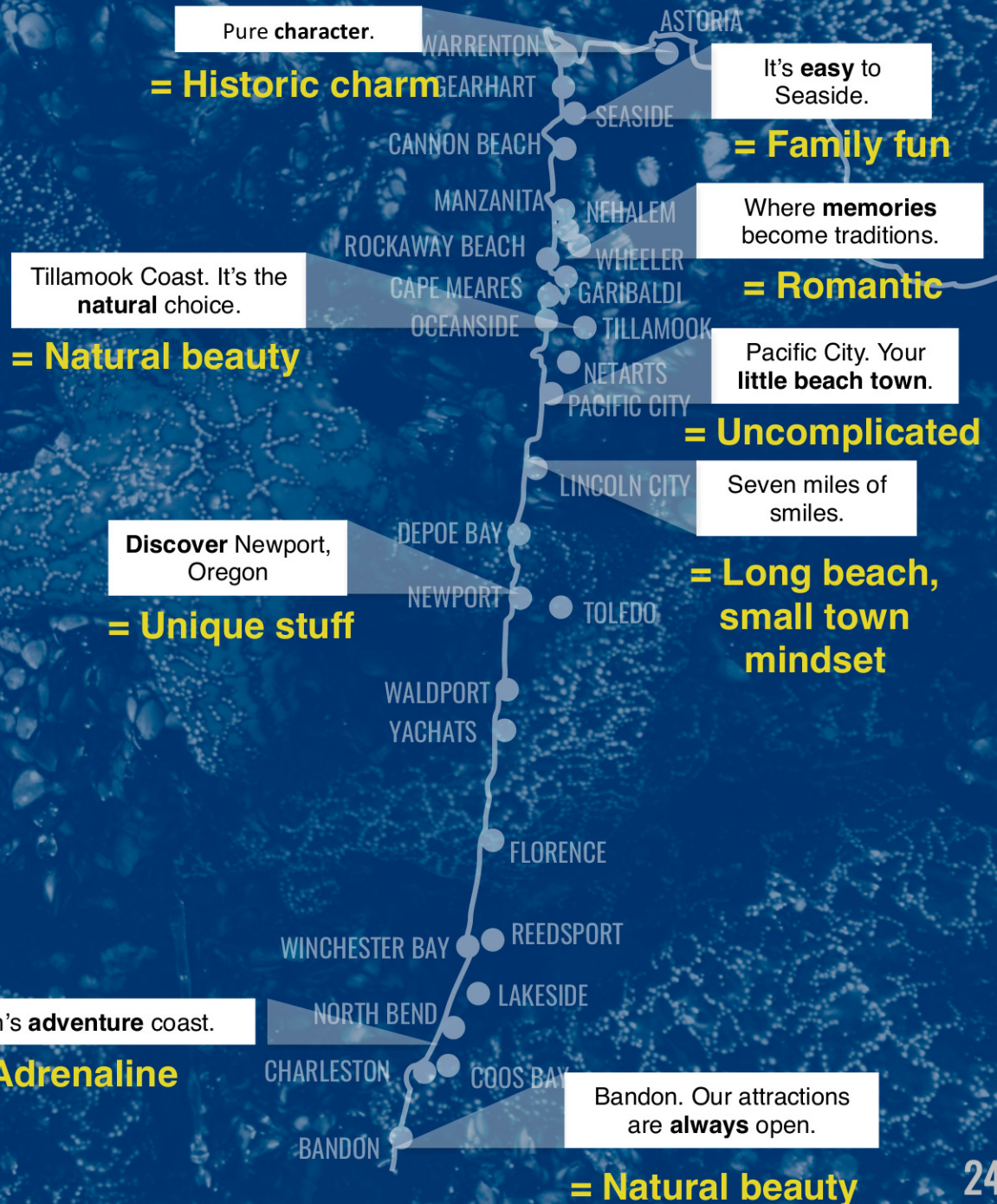
Next Steps

LINCOLN CITY

BRAND AUDIT | JULY 10, 2017

Next Steps

Taglines tell the story of positioning strategy.



Wash, Rinse, Repeat

Lincoln City Unified Branding Project

- Concept boards
- Stakeholder input
- One city brand
- Graphic standards
- New logo

The World's Largest Air Conditioner

A close-up, profile view of a woman with long, light brown hair blowing in the wind. She is smiling and looking towards the right. The background is a bright, hazy sky, suggesting an outdoor setting like a beach. The overall mood is fresh and breezy.

Questions