



Volcanic Legacy Community Partnership DMO Plan

Part One: Visitor Focused Marketing Plan

Introduction

The initial phase of work with VLCP pointed to the opportunity to create a destination marketing organization to make the Partnership financially sustainable for the foreseeable future. This approach will enable the organization to both protect the resources and landscapes along the route, and deliver positive economic impact to the rural communities along the way.

Purpose

Thus, the VLCP DMO is being established for two purposes:

- (1) to make the Volcanic Legacy Community Partnership financially sustainable over the long term, as an independent organization not dependent on grants, and
- (2) to transform the Volcanic Legacy Scenic Byway All American Road into an economic driver for the more than 20 rural towns and communities along the 500 mile length.

Mission

The VLCP DMO will aggressively promote the Byway, visitor attractions, visitor facing service locations, and experiences along the route, to achieve significant results to attract members, marketing partners, donors, sponsors, and municipalities, to support the organization.

Values

- Focused on economic impact.
- Excellence in all things.
- Integrity in all things.
- Clear understanding of the needs and desires of visitor markets.
- Respectful of the economic situation in the area.
- Recognizing the need to deliver increased prosperity in the region to improve quality of life.

Vision

When the VLCP DMO is successful, the Volcanic Legacy Scenic Byway All American Road will be recognized nationwide as a premier visitor experience, deliver sustainable positive economic impact to the communities along the route, and have a robust roster of engaged, ongoing members, marketing partners, donors and sponsors, who believe in the mission and vision of the organization, and recognize the importance of its ability to sustain.

Visitor Focused Marketing Plan

The primary objective of every destination marketing organization is to attract visitors who deliver economic development to members, marketing partners and sponsors. To do so, the first priority of any DMO is a concrete plan with target markets who will be attracted to the visitor facing resources and assets of the DMO, coupled with a marketing action plan to capture the attention of potential visitors.

The following visitor focused marketing plan begins with the “bigger picture;” the forces and trends that will effect visitor attraction. That information is followed by an overview of visitor preferences and current visitor information, plus an actionable marketing/communication plan.

PESTLE Analysis

PESTLE analysis represents the broad factors that will effect any organization serving consumers in the United States.

Political: The political environment in the United States is in upheaval and not likely to settle out until the 2028 or 2030 election. In the meantime, the current chaos will continue, but it is unlikely that travel to southern Oregon and northern California will be affected by any particular event.

Economic: Inflation is currently at a 2-year low and unemployment is 3.4%, the lowest in three decades. However, many Americans still do not feel good about the economy. That, however, has not stopped them from traveling, especially on road trips. Road trips will continue to be the “go-to” for travelers since they are perceived as the most flexible, relaxing, and cost effective.

Social: Social issues are raging in America at the current moment and will continue to do so for the foreseeable future until some issues are resolved. They will not affect travel to Oregon and California, which are viewed as very tolerant.

Technological: AI has sprung onto the scene as the most critical issue in the travel industry. The US Congress is working to regulate AI. In addition, visitors and destinations are going to have to be aware of the misinformation that can be generated by AI. This will only increase the need for accurate “official” websites that visitors can trust for information, while the spread of AI generated information will only make visitors more wary of what they find online.

Legal: The legal changes that are effecting other states in the US are not likely to occur in Oregon or California.

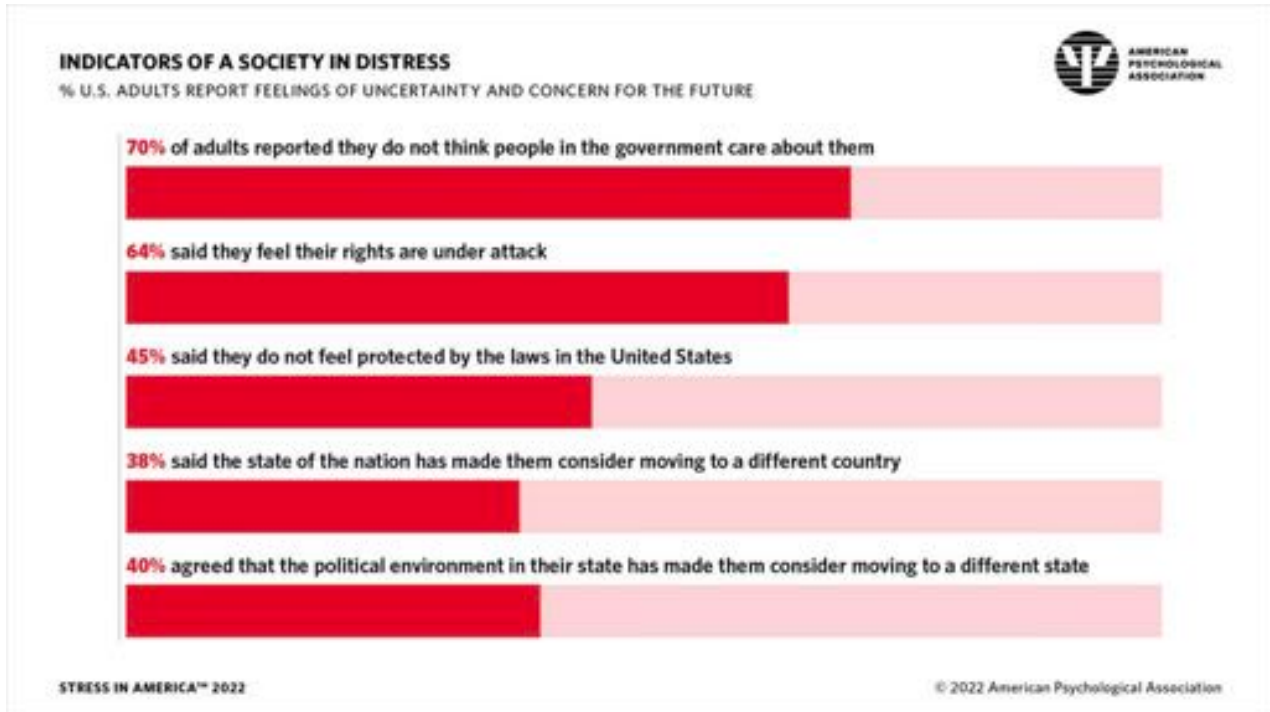
Environmental: Increases in the use of electric vehicles is going to require charging stations installed at regular intervals, especially in California where no new gas powered vehicles will be sold after 2030. Other environmental factors such as wildfire control will have an effect on the environment in both southern Oregon and northern California, and disagreements about the right approaches to protect the environment and stem the effects of climate change will continue into the future.

Other Societal Factors Effecting Success

Americans are Stressed Out to the Max

Five years ago, for the first time in polling history, the American Psychological Association (APA) Harris Poll revealed that stress and anxiety over the state of the country had topped the list of stresses, beating out money and jobs. Five years later, things have not gotten any better. In fact, they're getting worse.

Stress statistics from the APA collected in 2023 point out that 77% of US adults report feeling stress over the future of the nation, up from 66% in 2019. This factor was not even on the horizon in 2017. 63% of Americans adults also said that the economy is a significant source of stress, as compared to only 46% in 2019. 66% of professionals say their stress levels at work in the past year were higher than five years ago. The younger the person, the higher the stress levels, topping out with Generation Z, who are dealing with gun violence, and Millennials who are dealing with women's health care decisions.



These statistics point out that a large percentage of Americans, across all generations, including those who have lived through mass shootings, the Vietnam War and more, believe this is the lowest point in our nation's history they can remember. A pervasive anxiety has crept in, which gnaws at us each day as we are bombarded with the new daily crisis or the prospect of something dangerous occurring on the world stage.

One response is that we could become numb to it all and move toward the alternative universe created by Amazon, Apple, Facebook, Google, and the other tech giants. Experiences of all types including first rate movies, home delivered ingredients to prepare a gourmet meal, live streamed sports events, high quality entertainment, and most everything else, are available without leaving the house. That approach including the insular "I don't have to communicate with anyone" could contribute to a society where Americans don't believe in the benefit of community and the positive stimulation others bring to our lives. Yet, recent research illustrates that 80% of Americans adults are traveling, so a retreat to alternative worlds does not appear to be happening. More Americans have realized that getting out of the house is very important.

Dealing With Visitor Stress

According to the Pew Research Center, one of the premier research organizations in America, 80% of Americans have experienced some type of stress incident in the past month, the highest ever recorded in a Pew survey. This systemic stress and chaos and inherent fear of what might happen next pushes us toward the need for regular respite and re-generation. Relaxation and rejuvenation have become "medically necessary" for us to keep our wits about us.

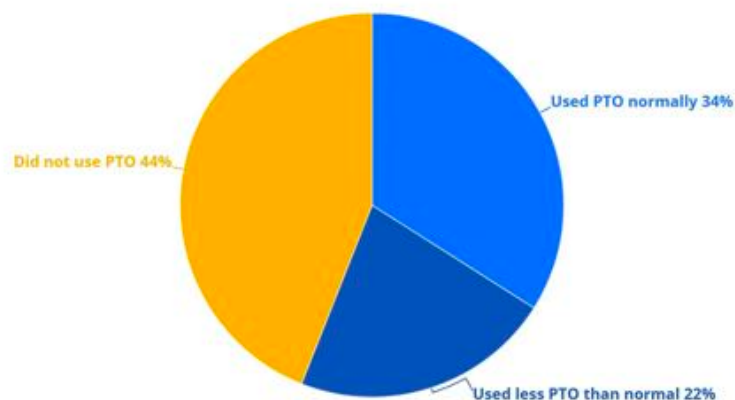
Consider that eight out of every 10 people who will come to your area will have experienced a heavy dose of stress about one thing or another in just the past month. They may be so on edge that when something goes wrong within an experience that is supposed to be leisure, they may overreact. They may not want to deal with others, or may not want to interact in the community. On the other hand, some may use the experience to engage with the people they meet along the way, as a way to escape reality. It will be important to have those engaged in the visitor services

business be aware of these factors so they can respond appropriately to whatever the situation delivers.

Americans are Overworked

The business press has always admired entrepreneurs who work 70-80 hours a week, and those who became famous for “pulling themselves up by the bootstraps.” Unfortunately, because these myths are so ingrained in the American psyche, less than half of Americans use all their vacation days. According to the Pew Research Center, those who don’t take all their time off say it is because they don’t need it. That’s hard to believe with all the stress floating around. Or they worry about falling behind at work. Most of us never feel like we are completely caught up. Others don’t take time off because they feel bad about co-workers carrying their load. A few even think taking vacations hurt their chances for a promotion or could cost them their job.

This is changing with the Millennials and workers that are younger. PTO - personal time off- has become an important part of life to balance life and work into a functioning lifestyle. Having recognized that time off reenergizes workers, some companies are even instituting policies that require workers to take a minimum number of days off.



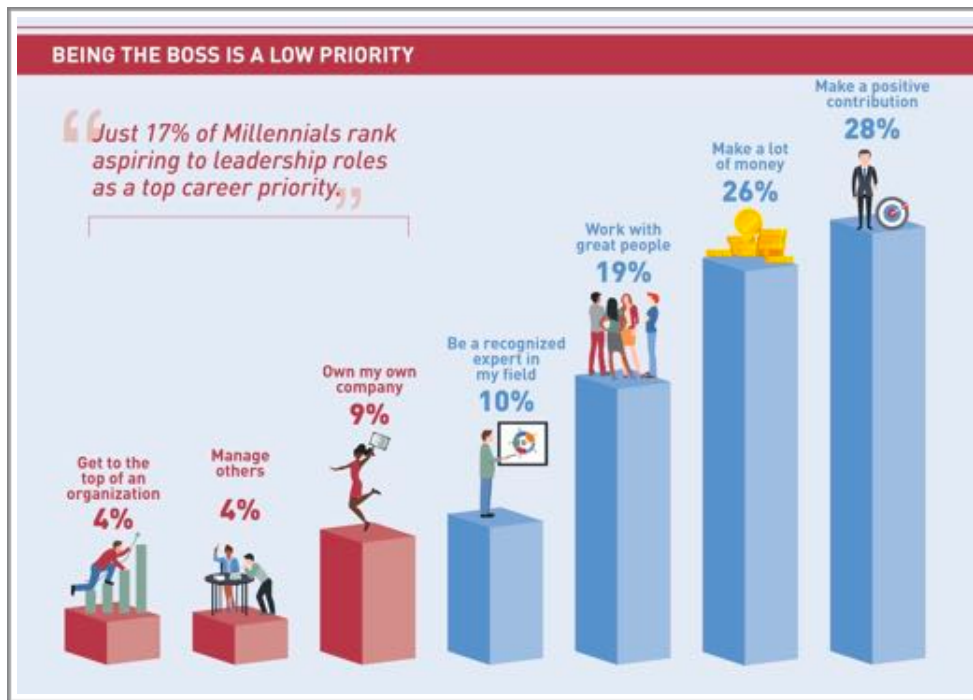
The Way Too Many Things Syndrome

Paralleled with high stress, Americans also travel to escape the demands of material culture. Many are “stuffocating.” Acquisition of too many things is the result of the focus on material possessions that are supposed to serve as an outward badge of economic success. Prosperity after World War II gave rise to the Boomers, who after college believed they would also own all the things their parents did. Buying all these new things did not bring new levels of satisfaction turned into rampant, random consumption. Today, maintaining material standards makes Americans feel even more anxious that they may not be able to continue their lifestyle. Getting out of the house to enjoy a different landscape alleviates having to think about what we do or do not have. Scholars have believed for quite some time that when Americans got tired enough of this situation, things would change. Apparently, they are. In 1970, 80% of Americans held the view that owning material goods was very important to their lives and their identity. Fifty years later, only 50% held that view. 73% say life has become too complicated.

Moving Toward Experiences

Millennials seemed to be the first full generation saying enough is enough, electing to live in center city, in smaller homes that have less space for things, and taking public transportation instead of owning a car. They express their identities through sharing experiences on social media. More than 80% indicate they have attended events and participated in live experiences over the past year. Over 70% say they will increase spending on experiences in the next year. Nearly 80% believe that experiences help shape their identity and create some of their best memories. This is a total 180-degree change in perspective from previous generations of young people who were admired for their ability to acquire the biggest house, the best furniture, and all the material possessions that supposedly came with success.

As more Americans have adopted a new perspective about what really makes them happy, they consistently move toward experiences. Respondents to a Click Magazine survey stated “new experiences and human connections in new places (74%) as very important motivators for travel. 76% said they need to find new ways to reduce the stress in life.



A Cornell University study revealed that consumers' evaluations and impressions of their material goods purchases went down the further they were away from the initial purchase, yet their evaluations of their experiences went up as they continued to share stories and memories about the unique things they had done with others. This is especially true when experiences are shared with friends and family that become the basis of family lore. Apparently, within this framework, experiences are more open to positive reinterpretation, with the bad laughed off as the experience is recalled again and again. The experiences one has also become ingrained as meaningful part of an individual's identity and work to strengthen social relationships when the experiences are enjoyed together.

The desire for experience also fulfills the quest for social media's "Instagramable" moments and the social currency of likes that come with them. Experiences produce a constant stream of shareable content that leads to conversations and interactions that extend the reach of one's network of friends and acquaintances exponentially across the net. Even the experiences that didn't turn out as anticipated become fodder for sharable stories as we lament with each other about what happened. One rather surprising factor that experiences also fulfill is FOMO (which

has now found its way into the Oxford English Dictionary), the fear of missing out. People feel pressure to keep up, to make sure they look like they are in the know.

Experiencing Together

Within all these factors, one of the most important reasons, or possibly the most important reason that Americans travel is (72%) time to reconnect with loved ones, and spend time with family. Time can be so short and family members, even those in the same house, so busy there is no time for actual conversation. Plus, when friends and family live far away, it can be hard to stay truly connected. We can text, Facetime, and follow each other on social media, but often weeks or months go by without actually talking.

Plus, it's one thing to visit friends and family at home, which occurs regularly in many families, but it's another to share new experiences, expressed in statements such as making memories, strengthening bonds with friends and family, seeing my child excited about the experience, and spending time with extended family. More than half of today's visitors say that who they are with and what they do together is more important than where they go, with more than 50% of travelers over 65 prioritizing trips to visit family and friends.

Spending leisure time with family and friends tell people they are important and family members remember the time they spend with family and friends more than the time spent at a museum or dinner. These personal connections make us who we are. Experiencing new things together make family bonds even stronger. Kids love being together in a new place, getting to bunk with cousins, and doing fun activities together. Even though many travelers may prefer flying with kids, road trips over the decades to spend time with family and friends have proven to deliver memories that are never forgotten. Twenty years from now, the experiences will be a topic of conversation. Remember when we

Americans Need Real Relaxation

The above research and more illustrates that Americans need time off for relaxation. Without taking time off, those who work with their minds, rather than their hands, which is most of us, stay connected to work. We never get to experience being completely free of the workplace, even for a few hours. Real relaxation only occurs when people physically remove themselves from their normal surroundings, turn off their electronics, and engage in a new situation to stimulate the mind and displace thoughts of work. If they don't leave home, work is always gnawing at the back of the mind and the technology to engage in it, always close at hand. This provides no real "time out." This is reflected in the fact that the number one reason that 63% of Generation X'ers travel is to avoid burn out, while 55% of Baby Boomers and Millennials do so for the same reason. Click Magazine's recent survey indicated that, across the board, the primary reason for travel was rest and relaxation. "Giving myself time to relax (84%), taking time to mentally unwind (78%), and boosting my mood (78%) were top motivators.

Travel Becomes a Wellness Product

Within this perspective, travel serves as a wellness product. People who skip annual vacations have a 30% greater chance of suffering a heart attack. 63% of couples claim that traveling has helped them stay together in their relationships. People under constant stress are less likely to eat healthy, less likely to exercise, more likely to fail at weight loss programs, and get half as much sleep as people reporting less stress. Realizing that more self-care is needed, 73% of travelers say that vacation time will be strictly work free. 79% of these travelers indicate that travel helps their mental and emotional well being more than other forms of self-care.

Well-documented studies by Duke University Medical Center proved that exercise programs do not do as good a job in preventing further cardiac events as stress management and reduction programs do. And in fact, participating in experiences that enabled people to get away from their daily lives completely proved to be as good at lowering blood pressure and relieving stress as formalized stress management programs. Enjoyable experiences that allow people to "live in the moment" and "lose themselves" in the process, are the most effective in doing so.

Travel and Tourism Trends Effecting Success

Road Trips

Road trips have always been the core of travel in the United States and will continue to be for the foreseeable future. Even though there was a seeming resurgence of road trips during Covid, much of that was caused by fear of flying and was the only travel that the press could keep track of during that time. Of the 2.2 billion trips taken in American each year, there are only 853 million air travelers total. Approximately 75% of all travel arrives from a radius of 4-6 hours surrounding any destination, the normal driving distance for road trips.

Vacation Rentals

Americans discovered the convenience of vacation rentals during Covid and that trend will only continue. As more Americans use their travel to re-connect with family and friends, the appeal of a property occupied by only one family has increased.

Travel Spending

Travel spending has not slowed in 2023 and as inflation declines, it will likely increase. Since many travelers are affluent and travel to keep their wits about them, curtailing spending will not be a priority.

More and Longer Term Trip Planning

In the most recent studies of trip planning prior to arrival, only 6% of travelers did not plan anything before they arrived at the destination. Even though most planning occurs within 60 days before travel, as travel becomes more valuable as a wellness tool, the more that planning will occur to ensure that vacations go smoothly and include interesting things to see and do.

Multi-Generational

Travel is being used as a way to connect with multiple generations of families who live in different parts of the country. This trend is also driving the surge in vacation rentals to enable the family to enjoy a property all to themselves as a family group.

Authentic Experiences

Byway travelers don't want luxury, they want authenticity and will seek out authentic experiences.

Remote Work/Bleisure

As 2022 approached, experts predicted there would be “a return to the office” and thus, a resurgence of business travel. Not only is the return to the office happening very unevenly, and in some cases, not at all, workers are expressing they are more productive not in the office. Some of the unevenness has to do with the fact that many of the Boomers, the original “road warriors” who traveled incessantly, took the opportunity to retire during Covid. Plus, many companies no longer see the same value of business travel since they got along without it for two years.

Blending business and leisure is not new, the new “laptop luggers” who can work from anywhere (now about half of all American workers), are just changing it. Many take vacation time for one week and then, instead of returning home, spend a second week at the destination working remotely. Or they explore at another destination between two business trips.

A new survey by Deloitte indicates that one in five travelers intend to work at least partially on their longest summer trip, with one-third intending add three to six days to their longest trip of the season to accommodate this flexibility.

Leisure travel motivations range widely:

- 46% I can bring loved ones with me.
- 46% It makes the trip more fun.
- 44% Travel to places that would otherwise not be visited.
- 44% I can conserve vacation time.
- 44% I feel more in control of my work.
- 43% Fares are less expensive due to flexible timing.
- 43% I can visit family and friends more often.
- 43% Cost savings because employer picks up a portion.
- 43% I can take longer trips.
- 41% I can spend more time traveling.
- 40% I can travel more frequently.
- 37% I can earn more reward points.

Remote work will remain a mainstay of professional staff working arrangements and combining work with leisure will continue into the foreseeable future. Experts predict there will be a 50/50 split between business travelers who add leisure to their trip and those that do not.

Visitor Activity Motivators

The most recent survey by Forbes Magazine regarding travel plans in 2023 illustrates priorities that continue to drive travel experience preferences:

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| 51% | Visiting Family and Friends | 23% | Romantic Trip |
| 42% | Road Trip | 21% | Cruise |
| 37% | Beach Vacation | 20% | Holiday Celebration |
| 31% | Celebrating Life Event | 20% | Resort Vacation |
| 24% | Camping Vacation | 14% | City Vacation |
| 24% | Outdoor Adventure | 11% | Sports Trip |
| 23% | Bucket List Trip | | |

The US Consumer Travel Report produced by well-known travel industry research firm Phocuswright, delivers the same message about travel motivations:

- 41% Desire to Get Away/Take a Break
- 38% Desire to Spend Time with Friends and Family
- 18% Available Time Off
- 15% Celebration
- 14% Desire to See Heritage/Cultural Attractions
- 14% Attend an Event
- 12% Holiday Time Off
- 11% Desire to Visit Major Attraction
- 08% Extra Money/Bonus
- 08% Desire to Engage in Specific Activity
- 07% Learn how Others Live
- 05% Loyalty Program Redemption
- 04% Extension of Business Trip

When the Morning Consult recently interviewed nearly 9,000 US adults about where they would travel, there were mentions of all 50 states, plus Washington, DC and Puerto Rico. About eight out of 10 travelers (78%) indicate they will continue traveling domestically, even after worries about Covid have passed. 76% indicated it gives them a new appreciation for the country and 74% indicated they enjoyed traveling domestically more than they thought they would.

Just at 85% of trips taken throughout America after the pandemic are taken by car and 78% of travelers prefer to travel by car even if they can afford to fly to their destination. While taking road trips, 69% enjoy the scenic drives, 69% love the freedom to stop anywhere, and 57% liked the fact they could pack what they wanted without having to worry about weight. Just over 60% of Americans said they're planning to take more road trips during the next five years, with over half confirming that they already have plans to hop in the car to travel in the summer.

The Ideal Vacation

The Portrait of the American Traveler based on thousands of interviews by the Y Partnership,, illustrates the elements of a great vacation.

The Must Haves

- 100% Internet or electronic Access (In case of emergencies for those who want to disconnect)
- 84% Beautiful Scenery
- 82% Enough Time to Relax and Unwind
- 82% Safe Destination

The Quintessential Enjoyable Vacation

- 76% A Place Not Visited Before
- 67% New and Different Cuisine
- 61% Architectural/Cultural/Historic Sites
- 59% Special Rates for Kids
- 53% Visiting Museums

Nice to Have

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| 49% Shopping | 31% Sports Events |
| 49% Organized Kids Activities | 26% Bicycling |
| 44% Hotel with Distinctive Atmosphere/Historic Hotel | 26% Water Sports |
| 44% Nightlife/Live Entertainment | 26% Lifestyle Hotel |
| 41% Theme Park | 24% Pet Friendly Hotel |
| 40% Hiking/Outdoor Adventure | 22% Fishing |
| 39% Performing Arts | 21% Golf |
| 39% Hotel Spa | 19% Skiing |
| 34% Boating/Water Activities | 16% Tennis |
| 34% Learning New Skill/Activity | |

Surveys conducted recently indicate that 60% of travelers look forward to meeting new people while on vacation in addition to spending time with friends and family. 75% of travelers indicate the journey to their destination is more enjoyable when it feels like part of the trip. Likely, to achieve this, more planning will take place prior to a trip, delivering more opportunities for small towns and rural communities to get their message across that they are a great place to stop and explore along the way. 58% of travelers indicate they want to form an authentic connection with the communities they visit. The trend towards authenticity enables destinations to feature “one of a kind” lodging options and distinctive accommodations. Local food offerings enable visitors to experience new tastes and “savor every bite.” Nearly 85% of Americans already have trips planned for the upcoming season and the typical American traveler says they expect to take 3-4 leisure trips during the coming months.

The Visitor Decision Journey

The journey that visitors take to plan and take their trips influences every travel purchase. That journey has changed dramatically with the rise of smart phones and the multitude of information about every travel experience that can be found online.

It is very important to understand the journey travelers proceed through to both, discover and book their experience, and actually participate in the trip they have purchased. Virtually all visitors, irrespective of their economic echelon, have access an electronic device of some type during the search and actual travel experience. The services required go way beyond locations such as hotels and restaurants on the ground, to include all of the touch points that engage potential visitors from the moment they become aware of the destination to when they return home from the trip - and ultimately, even in between the trips they take.

Today’s traveler buying journey is very different from other purchase journeys. Economists have traditionally viewed the customer buying journey as a funnel, in which a wide range of offerings are considered at first, rationally analyzed, price compared, and ultimately whittled down to one choice. More recently, linear diagrams illustrate points of interaction between an organization

and its customers, arranged along a straight line, as though the journey proceeds through time in an orderly fashion, with no starts and stops, ending in an ultimate decision to purchase.

The rational and linear purchase journey may still apply to non-discretionary items; practical things that are needed immediately, but even that has changed in view of the influence of the internet. If there is an emergency such as the refrigerator has stopped working or the car is no longer serviceable, today's customers start with a Google search for the specific item, do further online research among a selection of brands, check reviews, check with family and friends, compare prices and ultimately, if the purchase has a large dollar amount, may quite likely end up in a store to view and review the narrowed down choices. So many products in these categories have such similar characteristics, this type of decision often comes down to brand recognition, or perhaps something that a friend or family member has successfully purchased.

Neither of the above models apply to travel decisions which are discretionary travel purchases - those things we buy because we can, not because we need them. They are not rational purchases – they are emotional purchases. The buying journey that occurs when these experience choices are purchased take longer because the buyer enjoys the process of searching and considering.

Unless a visitor wants to travel or go to a show or sports event in the next day or two, there is no pressure to find something immediately. In a world where there is plenty of material wealth and tons of information about everything all around us, there's just too much information for any purchasing process that does not involve a pressing need, to be limited to a linear set of actions. Every discretionary purchase takes an individualized path that bobs and weaves based on the information that is discovered. And, it is possible that more than one purchase is being shopped for at the same time. Shopping for discretionary purchases this way does not just apply to Millennials and younger people. Boomers engage in the same type of process to get to decisions when they buy things they do not need. And, they use a variety of services along the way.

Discovery Phase

The beginning of a discretionary purchase journey has little to do with any organization. It has to do with the customer sensing they want to do something, have some relaxation to plan, or some other situation for which they want to make a purchase. While searching for travel experiences, the potential visitor may not be in any particular hurry to make a decision. Unless one lives in a home with no internet access, with no smart phone or I-pad, which would be very rare in households with enough discretionary income to travel, virtually every discretionary purchase begins online. As the customer begins a casual search online on a mobile phone or I-pad, that search becomes part of the whole experience that surrounds the discretionary purchase. This type of purchasing journey is a leisure experience in itself.

With only an inkling about where this purchase journey will lead or end, visitors begin casting about on Google, sometimes not even using the exact words that describe the ultimate experience that will be purchased. They begin clicking on the results presented, often on the very small portion of real estate that is their phone screen -- while waiting at the Doctors office, waiting for the car to be fixed, riding on a train, eating lunch, or whenever there is a moment to grab, to start looking for a particular offering. This browsing without pressure is best illustrated by television commercials for Carvana, the new app to purchase a car or trade in your current car, with the customer lying on the bed in their pajamas, eating popcorn while looking at the car website and selecting their new ride.

This process to cast about online looking for a discretionary purchase becomes a social experience that takes place only when there is time. Moving through the process ultimately gets customers thinking about what the right approach might be. In addition to browsing, visitors may also leave signals on social media about things that catch their attention, leaving comments on sites and other places where they believe they will receive input from others who have successfully booked the same experience, all the while under no pressure to make a decision.

Consideration Phase

Today's customers do not consider making a purchase without checking reviews. And, they look at multiple review sites, even when looking for a new experience to participate in. There's no getting around it. Because the customer is dealing with something they were previously unaware of, they believe they have nowhere else to turn besides the opinions of other people to determine if an experience is worth considering. The other place they go is to friends and family and they value their advice. If one of these sources is aware of an experience and has any experience with it, their opinion will have a definite influence on the purchase. This makes maintaining good customer service, retaining customers, and responding to reviews very important to future success. Comments must be responded to in every place they appear, and the information surrounding reviews, must be kept current. Millennials especially, expect to be able to read all the reviews, good and bad, and become skeptical of only good reviews.

After potential visitors have read enough good reviews, they will put an offering into the consideration group. Yet, most likely for any discretionary purchase being evaluated, unless the decision time is imminent due to a date specific selection, customers will continue browsing for other alternatives as they have the time. This leisure browsing, which provides an experience in itself, can continue for months, as various alternatives are discovered, evaluated, reviews checked, and filed in the back of the mind for future consideration.

Sharing Phase

Choices that remain in the consideration group after the above process are then shared and discussed with one's spouse, significant other, traveling companions, or other individuals who will also participate in the experience.

This is where the need for inspiring content becomes imperative. When information about the experiences is passed on to others, essentially, the potential visitor will be parroting what they have found online. The words they find online must be inspiring enough to motivate others to want to participate in the experience. As the conversation online and in person occurs, it is

inspiring content that is most critical to keep the conversation going and keep the experience under consideration. If no such content and images are available, there will be nothing to excite the potential visitor and other participants, and nothing to close the deal.

Note that up to this point, there has been no conversation about cost. Dealing with those realities upfront in the process breaks the magic of discovery and sharing. It's only when a decision comes close that customers began to look at the potential cost of their selections. Yet, because this is a discretionary purchase, cost will not be the final determinant.

The sharing phase can go on for days, weeks or even months. While participants use the expectation of the experience as a topic of conversation between themselves and heighten their own life perspective. As such, this consideration of a discretionary purchase becomes a social experience, influenced by all parties involved.

Narrowing Down Phase

As the planned time for the actual experience draws near, the conversation trends toward which options to seriously consider. Potential visitors may refer back to websites, social media and other information to review their choices and eliminate any they believe will not be appropriate.

Price Comparison Phase

With few options left to consider, the cost of the remaining options is evaluated. Even then, budget may still not be the factor that determines the ultimate choice, because experiences are purchased for the value they deliver, not the lowest cost. If an experience looks like it will be particularly engaging and exciting and has special components that visitors cannot get elsewhere, the extra cost involved will not be an issue.

Planning Phase

At this point, it becomes someone's job to determine the specifics required to make the experience a reality. Now that the potential visitor is actually purchasing the experience, there is a need for far different information than first attracted the potential visitor, to plan the activities.

If the planned experience is at an unfamiliar location, visitors must be able to download a planning guide — not a visitor's guide which lists only those who paid to play — but a true planning guide that provides the details needed to plan their experience. One example of the lack of understanding what potential visitors need at this point, is the fact that many destinations still expect leisure customers to dig through a visitor's guide with little detailed information, no directions, and no way to evaluate each included location. The extra time the customer has to spend researching the needed details may begin to annoy them to the point where they chose another alternative.

Activities must be accompanied by detailed planning information to be useful. Finding a place to stay should be more than just looking at a list of hotels. Hotel profiles should include information about amenities, location, cost, and other critical details so visitors can make an informed decision about what is right for them. Yes, this is a lot of information to provide, but since there are no travel agents involved in these transactions, it is information that potential visitors must have to plan their experience. If they don't obtain it from the location, they must find it somewhere else online. If the detailed information about the location is challenging to locate, it may be crossed off the list of possibilities, in spite of the inspiring content that first attracted the potential visitor.

Any location that offers experiences must take the point of view of the visitor who is completely unfamiliar with the location and think through EVERY potential piece of information that the visitor will need while "in destination" or at the location. Because visitors have to carry on their daily life while they are participating in the travel experience, restaurants categorized by food type and location, related activities classified geographically, and information about adjacent accommodations will be helpful. Visitors will need an overall map of the area, coupled with information about the best gas stations and other services, theater and evening entertainment.

Think through the other interesting things the visitor could participate in while in the area, related to the experiences they choose. Add that information as well.

Reservations Phase

Now that the visitor has chosen an experience, they need to make reservations. Can the experience be reserved on a website? Are there particular aspects of the experience that can be customized? Have these aspects been clearly explained so the customer can easily make a decision about the level of customization that is right for them? Can the customization be selected right online? Are the services that are needed to surround the experience offered alongside the experience? Are hotel reservations immediately apparent and available? Distinctive accommodations noted in addition to hotels? Open Table restaurant reservations? Other services visitors may need? Are other experiences that are complementary to the chosen experience clearly displayed? Does the information delivered and the technology systems visitors are using create the impression that visitors are appreciated and their reservations and choices easy to obtain? Has the process by which the visitor reserves the desired experience been completely thought through and tested by people who are not necessarily technology conversant?

Enroute Phase

Any organization that enables the reservation of experiences that occur on a particular date and time - are certainly aware of when visitors are enroute to their location. Visitors who are on their way to a destination that has engaged with them throughout their decision journey will appreciate contact asking if there is anything they need to make their experience better or even extra special. There are destinations that maintain contact with arriving visitors via Twitter, asking if there is anything else they can do to make their experience better. Visitors really appreciate this individual attention and of course, report the pleasant surprise they have receiving this personalized communication on to their friends and family.

Experiencing Phase

At this stage, months or weeks have passed since the visitors came into contact with the destination and utilized a variety of services to get to the point where they are taking the trip. Yet, this is the first time that they will actually come in contact with the physical locations on the ground.

When visitors participate in the experience, the desire is for them to state “what an amazing experience!” Yet, even at this point, there are still communications opportunities that can be delivered to surround their experience with more attention. Special offers, information about shows, concerts, and special events, that will take place while they are in the area, a new restaurant opening, or anything else the organization delivering the experience believes will enhance the quality of the visitor’s experience, can be shared. The word of mouth value of this approach is priceless.

It is also very important that the physical locations on the ground precisely resemble the information that was provided online. So often visitors are totally disappointed by the reality on the ground, vs. what is presented online.

Sharing Phase Two

When visitors return home, they share photos, experiences, reviews, and stories about their experience. This visitor curated content can be very valuable for organizations delivering experiences, yet so many organizations do not allow posting of photos and other materials, fearing they will post unseemly things. Instead of prohibiting customers from posting their material, have someone review the posting area of the website every day to make sure nothing of that nature is posted. The same goes for comments about the experience. Negative comments provide good feedback to make future changes.

In-Between Experiences Phase

Any organization seeking to expand the word of mouth marketing they get as a result of their experiences, will need to follow up with existing visitors to share new content on a regular basis to keep them interested. Communicating once a month or once a quarter can keep the experience front of mind with visitors who may not necessarily return, but will pass on positive thoughts about their experience to others in person and on social media. This very inexpensive method for communicating with existing customers can generate great word of mouth marketing. If new experience components are introduced, visitors who enjoyed the experience they did have, will want to know about them and perhaps purchase again, to participate in the enhanced experience.

Wrapping Back to the Planning Phase

Visitor information collected in a CRM should provide a cohesive record of each visit and substantive interaction, enabling the organization to send new content intended to make the visitors next, repeat experience more exciting, more enjoyable and more effectively customized. This approach is a great personalized way to attract visitors back, but also means that the customer relationship management system has to be utilized to not just collect information, but to actually manage and carry on a relationship with the visitor.

Turning now to the Byway, the database created during the previous Listen to Learn phase incorporating all visitor facing locations along the Volcanic Legacy SB All American Road illustrated a robust and extensive collection assets and resources:

Broad categories include:

- 122 Attractions for visitors to explore, both built and natural
- 117 Natural Areas; trails, walking tours, recreation areas, campgrounds, overlooks, and other natural areas
- 160 Retail locations (not including big box or chain stores)
- 37 Art Galleries
- 27 Golf Courses
- 44 Wineries/Breweries – there is a new Volcanic Manton Valley AVA
- 75 Sports locations; fishing guides, sports venues, nature tours, adventure tours
- 235 Accommodations of all types
- 391 Restaurants and eateries (not including chain restaurants)
- 52 RV Parks
- 9 Marinas and Houseboat Rentals

Further segmentation presents opportunities to position the Volcanic Legacy SB experience to a broader range of visitors. The route has strong outdoor recreation locations:

- 33 major natural areas
- 27 smaller natural areas
- 33 trails
- 5 falls
- 5 lakes
- 8 state parks (several are also historical)
- 29 fishing outfitters
- 28 golf courses

The route also has strong heritage and cultural resources:

- 91 art gallery, antique shops, and creative product locations
- 37 museums
- 19 theaters and cultural performance locations (does not include commercial movie theaters)
- 44 wineries
- Several state parks with a historical component
- 7 historic town walking tours
- 7 heritage trails

These groupings can be combined with:

- 66 resorts and lodges to offer a more upscale outdoor recreation experience
- 53 RV parks
- 20+ Bed and Breakfast, and Inn properties

Niche markets that can be promoted include:

- 2 hang gliding launch sites
- 2 historic railroads (if they are running)
- 6 aviation locations offering air tours

The availability of these resources enables attracting visitors markets well beyond the outdoor recreation visitors, including markets that are significantly more lucrative than outdoor recreation visitors.

Capacity Assessment

The critical question to be answered about the capacity of the Volcanic Legacy SB AAR is whether or not there is adequate capacity along the route to serve more visitors, while also

delivering economic impact on par with other scenic byways. Detailed assessment of the 21 small towns between the two National Parks points to robust available capacity. If all of the available rooms were filled with visitors every night of the year (based on double occupancy) and spending occurs at Oregon levels, there is the capacity to generate \$299M in annual visitor spending between the two end points. Obviously, not every night in every room is going to be filled, and there are seasonal variations, but even backing off that figure by 50% illustrates the ability to deliver \$150M in annual visitor spending, in addition to the \$91.5 million in visitor spending collectively delivered by Crater Lake National Park, Lassen Volcanic National Park and Lava Beds National Monument. Spreadsheets illustrating the detailed analysis are available.

Total Available Rooms / Cabins	3980	
Guest Multiplier	1.8	7164
Seasonality Adjustment	0.67	4800
Average Occupancy Rate	0.57	2736
Total Available RV Sites	1589	
Guest Multiplier	1.8	2860
Seasonality Adjustment	0.67	1916
Average Occupancy Rate	0.69	1322
Total Available House Rentals	634	
Guest Multiplier	5.4	3424
Seasonality Adjustment	0.67	2294
Average Occupancy Rate	0.28	642
Total Daily Visitor Capacity		4700
Daily Tourism Spend	\$249	\$1,170,417
Accommodation Spend Adjustment	0.70	\$819,292
Daily Tourism Revenue Estimate		\$819,292
Annual Byway Revenue Estimate		\$299,041,514

The Byway's Story

The following Byway stories were developed for the detailed itineraries illustrate the VLSB has a strong and intriguing story to attract visitors:

Story Element One - The Ring of Fire

Millions of years ago, the earth's plates moved and molten lava exploded between the cracks, spouting high into the sky. All that fire and fury created the Ring of Fire, a circle of volcanoes around the Pacific Ocean, which today in some places is still active – with volcanoes ready to blow. One of the best places in the world to witness the results of this geologic activity is in the area that encompasses Northern California and Southern Oregon, where the landscape is dominated by soaring volcanic peaks, expansive lava flows, dramatic caves, bubbling mud pots, and steaming fumaroles. But the scenery is not the only star of this story. When gold was discovered in the foothills of the Sierra Nevada Mountains in 1848, it sparked an international pursuit that brought hundreds of thousands of people to the West and put California on the map. Entire boom towns were built around gold mines, railroads extended their lines, and agriculture and ranching expanded throughout the countryside in order to meet the needs of the new settlers. The Volcanic Legacy Scenic Byway All-American Road intertwines these two stories - one geologic, one historic - by tracing the path of countless old mining towns and five volcanoes: Crater Lake National Park, the deep caldera created by Mount Mazama's explosive eruption, Mount Shasta, Lava Beds National Monument, Medicine Lake, and Lassen Volcanic National Park. One of only 42 All-American Roads in the United States, this 500-mile Byway travels from Oregon to California and through dense, mountainous forests, broad wetlands, clear streams, and pastoral farms and ranches while whispering tales of the country's Gold Rush at every turn.

Story Element Two - Battle of the Titans

Legend has it that many years ago, two Klamath gods got into a great fight. Llao, god of the underworld, lived deep beneath Mount Mazama but fell in love with the Chief's beautiful daughter. When she refused his advances, he became angry and hurled fire onto the village from

an opening at the top of the mountain. Skell, spirit of the sky, decided to defend the villagers from Llao's wrath. A battle ensued, and as Llao and Skell hurled giant rocks at each other, the earth trembled and landslides of fire spilled from the mountaintops. Llao was eventually driven back into the underworld and in order to keep him there, Skell covered the opening of Mount Mazama and filled the pit with water. Today, we call that water Crater Lake. One of the best ways to experience this natural wonder is on a drive along the Volcanic Legacy Scenic Byway All-American Road, a spectacular 500-mile route that runs from Oregon to California. But that is not the only story this stretch of the Byway has to tell. Millions of years after the mountains and volcanoes emerged from the land, another treasure revealed itself - gold. All it took was one shiny flake for boom towns like Redding and Yreka to spring up overnight with hopefuls in search of a new life and a little bit of gold. From historic Main Streets to museums full of fascinating artifacts, history will come alive right before your eyes as you travel along the Volcanic Legacy Scenic Byway.

Story Element Three - Nature's Wonderland

Calling all wildlife and nature enthusiasts! The Volcanic Legacy Scenic Byway All-American Road is a spectacular 500-mile route that runs from Oregon to California, but this stretch of the Byway is a veritable who's-who of the Pacific Northwest animal kingdom. Over 200 species of birds and dozens of animals like pronghorn antelope, mule deer, river otters, trout, and coyote live on the six National Wildlife Refuges nestled within Oregon's Klamath Basin region. Thanks to the thousands of acres of grasslands, forests, farms, and wetlands that make up this area, birds like bald eagles, sandhill cranes, pelicans, swans, and falcons have been spotted amongst the trees. In fact, more than 80 percent of all migrating birds stop in the Klamath Basin, and in the spring and fall seasons, migratory waterfowl can number in the millions. Towering cattails, dense tule, aromatic sagebrush, and lush pine forests line the Byway as you venture deep into Northern California to visit towns like Weed, McCloud, and Susanville. Travel back in time with walks down historic Main Streets and let history be your guide as you learn the story of how the railroad and lumber industries played an integral role in the development of these communities. From homemade breakfasts at the local diner to antique furniture in 19th century inns, these

cities are big on small-town charm and ready to introduce you to the Volcanic Legacy Scenic Byway.

Story Element Four - Fumaroles, Mud Pots, and Lava Tubes

Imagine a landscape where steam rises up from the ground in sudden bursts, iridescent pools bubble and gurgle, brilliant wildflowers dot the side of towering mountains, and jagged peaks lie as far as the eye can see. No, you're not on the moon. You're in Lassen Volcanic National Park! The dramatic scenery surrounding this park tells the tale of the area's wild geologic history, and there is no better way to hear that story than on the Volcanic Legacy Scenic Byway All-American Road, a spectacular 500-mile route that runs from Oregon to California. On this stretch of the Byway, you'll wind through Lassen Volcanic National Park for 30 stunning miles, and immerse yourself in the surreal world of cracking fumaroles, banging mudpots, and plunging alpine waterfalls. Then, take a deep breath as you leave the sulfurous volcanoes behind and enter the lush pine forests that surround the towns of Chester, Susanville, and Westwood. These historic lumber and mill towns were critical to the development of Northern California and still retain their community pride and small-town charm while serving as a fantastic home base for outdoor adventure activities like hiking, biking, and swimming. Take a dip in a shimmering lake, walk beneath the shade of towering trees, listen for the distant whistle of an eagle flying high overhead, and marvel at the geologic wonders found on the Volcanic Legacy Scenic Byway.

Story Element Five - Notes from the Past

Life in the Pacific Northwest was quite different 200 years ago. Most buildings were made out of wood, horse-drawn carriages grappled for space on city streets, and townspeople took bets on when the railroad would arrive and launch the community into modernity. Whispers of this era can still be heard throughout the region, and there is no better place on which to listen to the past than on the Volcanic Legacy Scenic Byway All-American Road, a spectacular 500-mile route that runs from Oregon to California. Sitting at the intersection of history and geology, this route tells the tale of cities like McCloud and Mt. Shasta, where the burgeoning lumber industry helped create these mill towns practically overnight, and of Tulelake, which played a poignant role in the second World War. But American history is not the only story told on this Byway.

Millions of years ago, the land sputtered and cracked and molten lava burst through the ground, creating an otherworldly volcanic landscape dotted with towering mountains, desert caves, natural bridges, and giant lava tubes. This section of the Byway takes you directly to locations like Medicine Lake, Lava Beds National Monument, and Crater Lake National Park, prime examples of this fascinating geologic era and where you can dip your toes in an alpine lake, thousands of feet above sea level.

Current Visitor Behavior

There are 31 million residents within a 6-hour radius (the normal driving radius for road trips) of the Volcanic Legacy Scenic Byway. A number of the 69 million prime Byway visitors in the US also reside within the radius. The visitor resources on, near, and adjacent to the Byway are available at all star rating levels and able to accommodate visitors of many types, income levels and interest areas.

Oregon

Data retrieved from Travel Oregon before the May 2023 research introduction illustrated that the ideal visitor market for VLSB ARR was already arriving in Oregon, based on their primary reasons for visiting:

24% Touring

23% Outdoors

17% Special Event

11% Resort

11% City Trip

06% Casino

Their selection of places to visit and experiences to engage in revealed a strong interest in exploring culture and heritage in the region:

- 31% Historic Places
- 22% Cultural Attractions/Activities
- 12% Exceptional Culinary Experiences
- 12% Brewery Tasting/Tours
- 09% Wine Tasting/Tours
- 07% Ecotourism

Updated data revealed virtually the same information:

- 36% Historic places
- 30% National or state park
- 27% Cultural activities/attractions
- 27% Touring
- 25% Outdoors
- 23% Special Event
- 18% Exceptional Culinary Experiences
- 16% Museum
- 12% Wine tours and tasting
- 12% Beer tours and tasting
- 10% Art Gallery

Top locations visited include:

- 25% National/State Park
- 24% Landmark/Historic Site
- 20% Fine Dining
- 20% Hiking/Backpacking
- 15% Camping
- 15% Museums

Additional data reveals that 91% of trips to Oregon are taken by car (whether personal automobile or rental), 71% of the trips taken with a spouse or partner, and an average of 4.1 nights are spent in Oregon. Just over 10% of visitors indicated they did not plan anything before traveling. 50% of the visitors who did plan in advance did so within 60 days before the trip. A third of travelers arrived between July-September and a quarter between April and June.

After not having supported detailed visitor research since 2017, the new research Travel Oregon released in May 2023 illustrates the opportunity to attract Oregon visitors to the Byway even more clearly.

90% indicated that scenic beauty was their top activity selection factor

84% used an automobile for transportation, whether owned or rented

70% were 45 years or older, with the average age rising to 51.1

Fewer traveling parties had children

Per party trip spend rose to \$2,497 with 25% spent on lodging, 24% on dining, 12% on retail and 11% on things to see and do

Only 6% did no planning before arriving, with 50% planning within 60 days, and 44% who engaged in a longer planning horizon

Historic old towns and art galleries are the top two heritage/cultural activities

Specific Southern Oregon data indicated a higher incidence of larger traveling parties, coupled with a larger number of parties staying longer than the average Oregon stay. Some of this difference can be attributed to the Rouge River Valley with multiple wineries and other attractions being included in the same Southern Oregon region as Klamath Falls.

Average Length of Stay

27.1% 1-2 Days

39.9% 3-4 Days

33.0% 5+ Days

Travel Party Size

67.5% Two Adults

17.5% Solo

15% 3 or more

Traveling Party Composition

81.1% Spouse or partners

28.0% Children under 18

09.8% Friends

08.8% Adult children

07.4% Other relatives

04.7% Parents

02.6% Pets

Trip Purpose

48.9% Leisure 44.5% in 2019

25.2% Visit friends and family 29.7% in 2019

11.8% Business 08.8% in 2019

04.0% Other personal reasons

03.7% Bleisure

03.7% Event or festival

02.6% Conference

Average Daily Per Person Spend \$249

22.8% Lodging

20.0% Dining

12.0% Attractions/activities

10.9% Retail

08.6% Rental car

04.8% Ground transportation

0.08% Food stores

Trip Spend Summary

Party size 2.1

Length of Stay 4.3 Days

Per day travel party spend \$513

Travel party spending per trip \$2,205

Per person trip spending \$1,069

Accommodations Used

41.4% Hotel

26.5% Motel

16.3% Friends or family

15.2% B&B

14.5% RV campground

08.7% Glamping

08.2% Private home

06.9% camping

01.9% Second home

0.09% working farm or ranch

Activities Participated in Last Oregon Trip

60.9% Eat and Drink

46.9% Outdoor Recreation

32.3% Scenic Ride

30.1% Shopping

26.5% Business or Family Related Event

22.9% Art and cultural heritage

17.4% Attractions and entertainment

12.6% Festival or special event

09.1% Health and wellness services

08.5% Sporting event

06.8% Agricultural experience on working landscape

Age

26.6% 65+

20.1% 55-64

13.8% 45-54

22.9% 35-44

14.1% 25-34

02.9% 24 or younger

53.7% women/45.3% men

85% College or some college

Even split between employed and retired

Source States

40.6% Oregon

14.5% California

14.3% Washington

05.3% Arizona

03.4% Texas

03.2% Idaho

03.0% Colorado

02.5% Nevada

02.3% Utah

California

Recently introduced visitor profiles indicate visitors revealed their ideal destination would:

- Offers an abundance of scenic experiences including national/state parks and beaches
- Has endless road trip opportunities featuring scenic beauty, interesting towns and off the beaten path experiences
- Has culinary experiences, food, wine, craft beer, that are part of the culture/lifestyle
- Offers rich multi-cultural experiences
- Is rich in cultural attractions, historic sites, cultural institutions and diverse neighborhoods

Immerse Visitors indicate they chose the destination because they could:

Live like a local and find enrichment from local culture

Broaden their knowledge and enriches their understanding of the world

Allows me to immerse myself in local life and culture

Helps me to meet new people and create new memories

Provide me with unique and interesting experiences

- Culinary festivals
- Winery or wine region
- Performing arts
- Museums, science centers
- Historical sites
- Art museums/visual arts venues
- Exploring small towns
- State/National Parks
- Driving on scenic byways or roads
- Hiking

Recharge Travelers indicated they preferred destinations that:

Met their need to relax, escape everyday life and recharge:

Restores my sense of harmony/balance

Gives me time out to think and regain control of my life

Helps me to escape from everyday stress/pressure

Finds a sense of relaxation

Allows me to feel organized and avoid surprises

- Farmers markets
- Winery or wine region
- Unique local restaurants
- Scenic byways and roads
- View/enjoy natural beauty
- Shop at unique local shops

Data from Shasta Cascade encompassing eight counties in northern California presents a different picture than that of Southern Oregon. More traveling parties stay in commercial accommodations (85.1%) and more stay in vacation rental properties (14.9%). Source states include the same locations with a different percentage of arrivals.

Source States

42.8% California

10.2% Oregon

09.0% Washington

04.3% Arizona

03.% Texas

02.5% Idaho

Source Cities

57% from San Francisco and Sacramento

15% from Los Angeles

11.5% from Portland

10.7% from Seattle

6.1% from Phoenix

5.6% from Eugene Oregon

Two-thirds of Shasta Cascade visitors have incomes over \$75K. The 57% of visitors who are over 45 is roughly the same percentage as Southern Oregon with 60.5% over 45.

Arrival data into Siskiyou County, based on Experian Mosaic demographic profiles somewhat backs up the information from Oregon and Shasta Cascade, with between 50% and 60% of visitors arriving into Siskiyou County in the over 45 age group. 48% of those traveling into Siskiyou County have the discretionary income (over \$75K) to travel.

11.9% Autumn Years

11.6% Blue Sky Boomers

7.1% Thriving Boomers

3.3% Booming with Confidence

10.6% Singles and Starters

2.3% Suburban Styles

1% Power Elite

Yet, in addition, 17.4% of arrivals are Golden Year Guardians with very limited incomes and little discretionary income to travel.

Target Visitor Markets

Target Market Priority One: Traditional Byway Travelers

The most lucrative target market for the Byway are those visitors already arriving in Oregon to engage in “touring.” These visitors with a profile identical to typical Byway visitors, re older, wealthier, more educated, and explore culture and heritage. While exploring they also enjoy wineries, local cuisine, and hopping in arts locations. They do not demand luxury accommodations, instead preferring those authentic to the destination. The presence of non-chain accommodations is not a detriment to attracting this market. The National Travel Center White Paper on this market is attached.

Prime Byway travelers are:

- Primarily older, married, educated, and affluent couples
- Frequent users of social media
- High value travelers who participate in more activities and visit more attractions
- Average trip spend of \$2,497 per trip includes 34% spent on accommodations, 20% dining, 11% retail, 10% things to see and do
- 60% plan at least 2 months in advance of longer trips.
- 78% stay in commercial accommodations with a preference is for unique lodging
- Sightseeing includes famous landmarks, national and state parks, historic sites, museums, breweries, wineries, art galleries
- Fine dining is a regular thing, coupled with a variety of not necessarily high end foods and cuisine
- Shop in local shops, boutiques, art galleries
- 89% visit one state, 28% from April-June, 32% July-September
- They access destination websites, OTA's, hotel sites and social media for information

Target Market Priority Two: RV Travelers

The 52 RV parks along the Byway route indicates that RV travelers are also arriving in the region. The RV Association segments RV travelers as follows:

39% Casual Campers

Use their RV only a few weekends a year in the warmer months. Thoroughly enjoy the RV lifestyle and the relaxation and escape in nature is delivers.

82% over age 55

56% Female

55% Retired

53% earn under \$65K

90% no children at home

72% I am a private person

55% weekend trip in RV, 46% weeklong trip in RV, 44% car road trip

Most travel with a travel trailer, rather than a free standing RV

33% Family Campers

Most have grown up in an RV family and use camping to bond with family and spark the hobby to the next generation. Travel limited by full time employment.

80% under age 55

53% Female

64% Employed Full Time

58% over \$65K

64% live at home with children

73% I am a very private person

26% weeklong trip in RV, 25% beach vacations, 22% camping and backpacking

Most travel with a travel trailer, rather than a free standing RV

16% Escapists

Committed to RV lifestyle, enjoy the freedom the exploration the RV provides. Traveling as a family for 2 months of the year.

54% over age 55

50% Female

40% employed full time, 40% retired

60% over \$65K

31% live at home with children

72% I am a very private person

54% weeklong vacation in RV, 35% beach vacations, 31% destination trip in an RV

61% use a travel trailer, 9% a motorhome

6% Avid RVers

Committed to traveling in an RV every chance they have, using their RV for a season each year. Romantic getaways and the best of nature.

62% over 55

64% Female

26% employed full time, 48% retired

51% over \$65K

78% no children at home

66% I am a very private person

53% weeklong vacation in an RV, 38% destination trip in an RV, 30% beach vacations

59% travel with a travel trailer, 12% a motorhome

3% Happy Campers: snowbirds who use their RV half year in a warmer location.

1.5% Full Timers who make the RV their home.

1% Adventure seekers.

Target Market Priority Three: Outdoor Recreation Travelers

Although outdoor recreation visitors will continue to be an important market for the Byway, they represent a lower spending visitor than the two previous target markets. There is also a difference between outdoor recreation participants and outdoor recreation visitors. The Outdoor Recreation Association lists 53 outdoor activities, 15 of which apply to the Byway travelers: Backpacking, Bicycling, Camping, Climbing, Fishing, Hiking, Horseback Riding, Hunting, Kayaking, Rafting, Skiing, Snowboarding, Swimming, Walking, Wildlife Viewing. Some of these activities are observational, while others involve active participation.

The typical core outdoor recreation participant is:

37 years old average age, 22% over 55

53% Male

College educated

Average income \$74K

43% have children at home

30% spend \$2,500 or more

70% spend \$1,000 or more

Travel information obtained primarily from social media and family and friends

Their gateway to outdoor recreation includes camping, biking, hiking, running and fishing.

Travel motivations include:

Being physically active outside: 80.2% female, 74.9% male

Interacting with nature: 73.2% female, 65.3% male

Traveling in an outdoor environment: 69% female, 63.4% male

Going to a neighborhood park: 65.2% female, 58.3% male

Just being outside: 59.4% female, 55.3% male

73.8% seeing landscapes

49.7% easy walking

41.2% nature photography

42.2% hiking forests and mountains

31.5% sailing, kayaking

11.8% mountain climbing

9.1% mountain biking

Outdoor Adventure segments represent a subset of the outdoor recreation market

Adventure Grazer

Bucket list driven

Not likely to repeat activities once experienced

Perform at novice/beginner skill level

High thrill seeker

Exploring new places

Spending time with friends and family

Adventurer

Actively seeking to improve and enhance skills

Repeat a favorite activity or related activity on multiple trips

Perform at intermediate level

Moderate thrill seeker

Relaxation

Spending time with friends and family

Adventure Enthusiast

Practice activities at a high skill level

Dedicated to one activity

Accept higher risks to achieve greater thrill

Seek unique and new destinations to practice favorite activity

Target Market Priority Four: Immerse Travelers

A fourth target market is visitors who resemble the “Immerse” travel persona of California combined with the cultural and heritage visitor to Oregon. These visitors travel to a destination to try new cuisine, wines, brews, and other culinary experiences along with “light” exploring. They often use their travel experiences to spend time with friends and family, are more likely to stay in a vacation rental, and not fill every day with exploration. They travel to take time off and enjoy themselves, and achieve relaxation just by being in a different place than home. These are visitors that can be attracted from the Bay Area and Portland that want to get away to a new place to visit and relax. California describes their personalities as creative, curious, open-minded, authentic and youthful, even if they are not young, they want to feel young.

Characteristics of this market include:

Exploring the new and unexpected

Invested in sharing new things and encouraging other to join in

80% have children

Incomes \$100K+

State: “I live life to the fullest, I’m at the top of my game.”

State: “I’m wallet savvy.”

Seek to elevate their lives and connect them with the world

Sense of discovery

Research more than three sources to select a destination

Plan within 2 weeks of departure

Get information from the internet, social media

Target Market Priority Five: Natural Exploration Visitors

A fifth market is visitor who enjoy exploring the natural environment without necessarily being physically engaged and enjoy a more intellectual approach to these places. These visitors explore the national park environments, the volcanic story, caves, gardens, parks, and other appealing places with the intent of learning more about them. They are not going to climb mountains or go fishing, but they are going to relax in nature. This market inherently regards travel as a “wellness product” that lets them disconnect from their daily circumstances and lower their stress, yet also one to engage their minds to enable a mental as well as a physical escape.

23% age 45-54

22% 55-64

57% Female

43% Male

27% \$60K-100K, 25% over 100K

Travel as educated couples

99% to see new things

97% to see more of the world

96% to have fun

91% to have an adventure

88% scenery and landscapes to explore

88% to learn something new

85% to relax and take it easy

82% to get away from it all

82% to understand the history of it all

43% see wildlife in natural settings

38% walking in untouched countryside natural environments

36% natural and ecological sites to visit

26% plan their visits around the nature-based activities that are available

Target Market #1 Traditional Byway Travelers Marketing Strategy

Baby Boomers are the traditional Byway travelers. They need to be reached online, since they spend an average of 27 hours a week online. Facebook is the most popular social media platform with 78% of Boomers, YouTube next at 67% and further down the list, Pinterest at 40%, Instagram at 32% and Reddit at 31. 83% of Boomers belong to at least one social media platform. Posts can be targeted geographically and by age and income to reach Boomers in the Bay Area and the Portland area.

Traditional Byway Travelers Core Message

Enjoy one of America's premier Byways, bookended with two spectacular National Parks, to explore at your leisure, traveling through authentic Northern California towns, enjoying local cuisine, unique accommodations and delightful shops, in between learning the story of the region in heritage and cultural locations along the way.

Target Market #2 RV Travelers Marketing Strategy

RV'ers have their own community, their own association and their own publications through which they can be reached most effectively. RVillage is a social network completely devoted to RV'ers and there are 5 Facebook Groups devoted to them as well. There are no less than 10 four color magazines devoted to RV'ers and several other specialized publications. Editorial appearing in these magazines and on their social media sites will have more credibility with this target market than appearing elsewhere.

RV Travelers Core Message

Over 50 RV parks await your visit, while enjoying the very unique landscapes along the Byway, tucking in and out of historic towns, enjoying local cafes, and escaping into nature every so often, while traveling this All American Road, just perfect for RV'ers like yourself who want to explore by day and relax in a park in the evening with no care in the world.

Target Market #3 Outdoor Recreation Travelers Marketing Strategy

According to Outside Magazine, these travelers are long haulers, with the average age of their audience's next roadtrip at 800 miles. 39% of these travelers booked a destination after viewing a

video, and 86% of Bleisure travelers indicate they are going to add an outdoor recreation leisure component to their business trips. This makes video one of the most important vehicles to reach this market, complemented by sufficient detail on the website to enable these visitors to picture themselves on the Byway and have the details available to plan their trip. Even though we generally consider driving travel and outdoor recreation two separate markets, pleasure driving to enjoy nature is the number outdoor recreation activity.

Outdoor Recreation Travelers Core Message

Hike, trek, or climb mountains in the beautiful terrain surrounding the Volcanic Legacy Scenic Byway, one of America's premier All American Roads, where the scenery is unparalleled and the outdoor recreation second to none. You can camp for the evening or relax in one of the many hotels or unique accommodations along the way.

Target Market #4 Immersive Travelers Marketing Strategy

This market is going to drive off of culinary, winery and other cuisine related experiences, along with unique places to stay. They are upscale, making total cost of a trip not an issue, what can be included and folded together into a cohesive experience is more important. They are going to respond best to "Instagrammable" moments, showing others who are enjoying food, conversation and relaxation. Short planning times will require appearing on social media on Wednesday or Thursday, in front of a quickly planned weekend trip. Once they have responded to visuals, information about additional things they can do on a trip can be delivered.

Immersive Travelers Core Message

Food, wine, unique shops, beautiful scenery and interesting heritage, what more could you ask for on a great weekend trip taking you through one of America's truly unique landscapes, punctuated with volcanoes, part of the Pacific Rim of Fire, that loom over the terrain at varied points. Itineraries that include the best of the best make your visit easy.

Target Market #5 Natural Exploration Travelers Marketing Strategy

People who enjoy exploring unique geologic environments and other natural phenomenon - geotourists - will go where they can find it. A website filled with detailed information is the best

way to attract these visitors, who will want to know about the geology, topography and geography of any site, plus the resources, services and facilities available to explore the area. Effective social media posts will require substantive content regarding the area's geology and there are specialized publications such as the Geotourism Magazine and National Geographic that feature these environments. It is likely that a geotourism program to attract professors, geology students and other will be effective to reach this market. They are interested in integrity of the place and respond to interactive interpretation.

Nature Exploration /Geotourism Travelers Core Message

Millions of years ago, the earth's plates moved and molten lava exploded between the cracks, spouting high into the sky. All that fire and fury created the Ring of Fire, a circle of volcanoes around the Pacific Ocean. The Volcanic Legacy Scenic Byway is one the best places on earth to explore this geologic activity dominated by soaring volcanic peaks, expansive lava flows, dramatic caves, bubbling mud pots, and steaming fumaroles.

Goals

The following goals are S.M.A.R.T: Specific, Measurable, Achievable, Relevant, Time Specific

Goal #1 Focus on the most lucrative target markets in the Portland and SFO Bay Area region, plus other urban areas between the two, to increase visitors to the Byway by 20% within 2 years.

Goal #2 Target visitors (90%) who stay in commercial accommodations including vacation rentals on an ongoing basis to increase economic impact.

Goal #3 Increase the number of visitors by 25% who come to southern Oregon for touring and travel south along the Byway into California within 5 years.

Goal #4 Increase the number of visitors by 50% who stop to dine, shop, or stay in one of the 21 small towns between Crater Lake and Lassen, to spread the economic impact of their visitors throughout the region within 5 years.

Goal #5 Increase the number of visitors who reveal themselves as from out of town to the locations they visit and patronize along the route to exponentially increase the visibility and impact of the Byway through an ongoing program involving visitors and locations.

Initial Actions

Step One: Clean Up Volcanic Legacy SB Content Currently Posted by Others

During the initial research for this project, an online search turned up a multitude of websites and social media posts that included information about the Volcanic Legacy Scenic Byway AAR. Much of it was not accurate, out of date and accompanied by poor visuals that did not represent the Byway in its best light. As a result, potential visitors who Google Volcanic Legacy Scenic Byway are receiving all sorts of impressions of the Byway from websites created by people who either know nothing about the Byway, or put on inaccurate information. The first action to be taken is to contact all the organizations to provide updated, accurate information and images and ask them to replace what they have online.

Step Two: Create Additional Pre-Designed Experiences

Today's visitors are looking for guidance about what to see and do in the simplest, easy to follow formats as possible. The detailed itineraries encompass longer, full trips on the Byway and will be of great benefit in targeting typical Byway travelers. Other target visitor markets unable to devote these extensive time frames to explore the Byway will benefit from a collection of 1 Day, 2 Day and 3 Day experiences in the various Byway regions to guide visitors to have the most satisfying experience in that particular region of the Byway. This approach will increase the possibility these visitors will return to explore other regions of the Byway.

Step Three: Add Target Market Messages, Pre-Designed Experiences, and Detailed Itineraries to the Website

Establish a portal for each target market, complete with images in order that target markets can see themselves along the VLSB in preparation for the digital marketing push, along with deploying the detailed itineraries and shorter pre-designed experiences on the website.

Step Four: Determine the Marketing Materials Needed to Support the Traveler Buying Journey

Each of the target markets will need specific materials to support their actions for each phase of the traveler buying journey. Determining what is needed for each at this stage will enable gradual development of all the needed materials.

Step Five: Determine What Can be Repurposed

In the more than two decades since the Byway was designated, a good bit of material has been produced about the Byway to promote the route. Since we are changing target markets and marketing strategies, the purpose of this step is to print out every blog, social media post, and any other materials that are available and determine if each communication:

- Supports the vision and goals
- Appeals to one of the target markets
- Suits a specific marketing channel
- Supports the traveler buying journey

Archive all that can be repurposed for future use.

Step Six: Develop a Regional Media List

Every region in America has a collection of television stations, newspapers, magazines, community information portals and more. Each of these organizations has a website filled with content. Since, at this point, the cost of subscribing to one of the media management services with an existing database is not possible, a regional media list will be developed without that assistance.

Step Seven: Create Pre-Written Ready for Publication Articles

Publication of material about any destination is more likely to occur when media outlets are provided with pre-written stories and articles. Depending on the results of media list development, a series of five ready to print stories regarding the Byway will be developed.

Step Eight: Contact Potential Publications and Electronic Media Outlets

Contact each media outlet on this to review the qualities of the Byway and the pre-written articles to determine the appropriate schedule for content delivery to publications and electronic media outlets.

Step Nine: Establish an Event Plan

Since at the current time, VLCP does not have events that are produced along the Byway and does not have the means to do so, the first action on this step will to compile summary of events that currently occur along the Byway to utilize in the digital marketing program and later, for evaluation as to whether or not, Volcanic Legacy can establish a larger presence and possible economic benefit in any existing events, or must develop a schedule of events that will provide one element of a balanced revenue stream.

Step Ten: Digital Marketing Plan

Because initial the Byway is going to have to do a lot with a little, a robust social media marketing program will serve to get marketing reach underway at little to no cost. The following plan replicates the Byway digital marketing plan that resulted in the Byway appearing in 157,161 Google searches within 6 months.

1. Expand the digital marketing platforms to be utilized in the digital marketing program:

Google My Business: which tallies the search results and serves as a baseline platform.

Facebook - Existing

Instagram - Existing

Youtube

Pinterest

LinkedIn - 900 million professionals who travel

Twitter - still used by millions in spite of the recent uproar

Reddit - Baby Boomers use this

2. Compile events occurring along the Byway from all of the DMOs and other organizations and assemble into an editorial calendar to enable posts to be piggybacked on regional events.
3. Compile the social media platform page tags from the DMOs, Visit California, Travel Oregon and all major attractions in the region and a list of appropriate hash tags.
4. Create a content calendar based on the sequence of events.
5. Post 3 times a week to each of the 8 platforms for a two month period while Section Two of the plan is being prepared. Each post will be page tagged, hash tagged, and linked back to the website to increase backlinks, that lifts the website in Google rankings.
6. Analyze the results, modify the program as needed and continue for another 4 months.
7. Report out the results for each 2 month period in order to establish trends that can be illustrated to potential members and marketing partners.

Step Eleven: Visitor Engagement Plan

At the outset of the program, it will be important to engage any visitors who respond to social media posts, engage with Google My Business and other communication vehicles. All social media posts will have to be answered, and any other visitor engagement responded to within a 24 hour period. An email address posted on the website will enable the collection of potential visitor email addresses, which will be entered into a HubSpot CRM, a very effective and free platform for up to 1,000 email addresses. When visitor addresses are beginning to reach that point, it will be beneficial to have a discussion about a permanent solution to CRM capabilities. A short quarterly newsletter can be emailed to all in the CRM as the beginning of ongoing visitor engagement.

Monthly/Quarterly/Annual Agile Strategic Plan

Once the initial digital marketing tests have been completed, the process to outline the actions to be taken and milestones achieved in order to meet the marketing plan goals during a three-year planning period will be implemented, working backwards from the goals to today to schedule the actions on a monthly, quarterly and annual basis.

Visitor Marketing Metrics

The VLSB website is already equipped with the latest version of Google Analytics, which will serve as the basis for establishing the metrics if what is occurring as a result of the marketing program. During the initial marketing program, the analytics will be checked every 10 days during the six months of the program to determine the efficacy of the actions at that time. Google data will be supplemented with insights and analytics of each of the social media platform.

Marketing Costs

The above action plan is set up to eliminate any cost for marketing except for the current contract arrangements between the National Travel Center and Volcanic Legacy Community Partnership. The above outlined plan will be accomplished within that funding to get the program off the ground. The costs for implementation beyond that period will be estimated at the end of the project.

Potential Visitor Economic Impact

The Capacity Assessment noted above indicated that the route between the two National Park anchors had the capacity to deliver approximately \$300M in annual visitor spending, on top of the nearly \$100M already being delivered by the two National Parks and the National Monument. The average annual visitor spending numbers of \$250K-\$450K per mile, per Byway, per year indicates that the Byway has the top line ability to generate \$225M along the 500 mile route. A mid-range number represents \$175M in annual visitor spending.

The average visitor spending on Colorado Byways is \$313,000 per mile, per year. The 444 mile Natchez Trace Parkway realizes \$198M in annual visitor spending, or \$445,945 per mile, per year. The 454 Blue Ridge Parkway generates over \$1Million per mile per year.

Using Siskiyou County as an example, 140 miles of the VLSB lie within the county. At the midpoint of the visitor spending average, the Byway would generate \$49M in annual visitor spending in the county. At the lower end of average visitor spending, it would generate \$35M in visitor spending in the county, or a total of \$33,238 in additional revenues for each of the total of 1,053 businesses in the county, or in other words, about 2% to the total annual GDP of the county. The high end of visitor spending would add approximately 4% to total annual GDP.

Development of a Power Point and supporting materials will illustrate the economic impact the Byway can add to the local economy. This presentation will serve as the basis to County Commissioners, Mayors, Chambers of Commerce, and other organizations throughout the region from whom support can be requested.

Part Two: Member/Supporter Focused Marketing Plan

This section of the plan focuses on development of the Destination Marketing Organization functions of the Volcanic Legacy Scenic Byway. The outline of this material is the same as the outline presented to the Ford Family Foundation as funder for this plan.

I. MEMBERSHIP/MARKETING PARTNER RESEARCH, ASSESSMENTS AND TARGETING

A. Assessment of the Visitor Facing Resource Categories

In the interest of concentrating the initial economic development delivered by the Byway to the rural communities along the route, the inventory reveals the following numbers within those areas. The numbers do not include locations in Redding or Klamath Falls.

167 Restaurants

162 Accommodations

100 Retail Shops

53 Attractions (non-governmental with budgets)

47 RV Parks

30 Wineries

30 Sports Retailers and Guides

28 Art Galleries

16 Golf Courses

5 Houseboat Rental/Marinas

These locations represent a population of 638 locations to make the first priority of marketing programs and recruitment of members and marketing partners. If all 638 contributed only \$50, the total is \$31,900. If each contributed \$100 annually, it represents \$63,800 in annual revenue. Another round of marketing including locations in Redding and Klamath Falls that wish to be featured would expand that total.

B. Determination of Membership/Marketing Partner Categories and Costs

A graduated membership program will work to serve and incorporate as many of the smaller locations as possible. Each level encompasses a different amount of exposure on the website, in social media programs, and in print. Under the current program, there will be 624 posts (3 posts per week, 8 platforms x 26 weeks) available in which to feature various locations interested in becoming members and marketing partners. The following proposed membership categories should take that into account.

Byway Basic Business - \$50/Year

Listing on the website, under the appropriate category, including business name, street address, phone number and email address.

Byway Featured Business - \$100/Year

Listing on the website, under the appropriate category, including business name, street address, phone number and email address, plus short description and image.

Byway Premium Business - \$250/Year

Listing on the website, under the appropriate category, including business name, street address, phone number and email address, plus short description, image, website link and feature in 10 social media posts.

Byway Road Sponsor - \$500/Year

Listing on the website, under the appropriate category, including business name, street address, phone number and email address, plus short description, 3-5 images, website link and feature in 20 social media posts, page tags in 20 additional posts.

Scenic Byway Champion - \$1,000/Year

Individual page, including business name, street address, phone number and email address, detailed description, up to 6 images, website link and feature in 30 social media posts, page tags in 30 additional posts.

Scenic Byway Sponsor - \$1,500/Year

Individual page, including business name, street address, phone number and email address, detailed description, up to 10 images, website link and feature in 40 social media posts, page tags in 50 additional posts.

All American Road Legacy Sponsor —\$2,000/Year

Individual page, including business name, street address, phone number and email address, detailed description, up to 10 images, website link and feature in 50 social media posts, page tags in 50 additional posts. Partnership in a specialized cooperative marketing program and if submitted, video of business owner or manager.

C. Potential Cooperative Marketing Programs

There are also a number of cooperative marketing programs in which the locations could participate financially in addition to membership that will expand the reach of VLSB marketing. The targeted digital marketing program that will commence upon completion of this portion of the VLCP DMO plan will target the five target markets more broadly. In addition, there is an opportunity for marketing partners with the financial means to participate in specialized, targeted programs including:

Targeted Facebook Program - The Bay Area
Targeted Facebook Program - The Portland Area
Regional Marketing Program - Travel Oregon
Regional Marketing Program - Visit California
An Additional Targeted RV Marketing Program
Targeted Golf Marketing Program
Targeted Wineries Marketing Program
Targeted Sports Marketing Program
Targeted Arts Marketing Program

II. MEMBERSHIP/MARKETING PARTNER MARKETING PLAN

A. Membership/Marketing Partner Recruitment Goals

There are three priorities for this marketing program:

1. Recruit enough members and marketing partners to support at least a part-time staff member to consistently manage the effort.
2. Raise enough revenue to enable continuous digital marketing efforts that render effective results to attract consistently renewing members and marketing partners.
3. Establish more than one revenue stream for the VLCP that is not grants.

In addition, the following priorities will be important to success:

4. Generate consistent communications with all involved that illustrate the efforts and accomplishments of the VLCP.
5. Achieve consistent delivery of economic impact to the rural communities along the route.
6. Achieve continuing involvement of the communities, municipalities and other governmental entities along the route as a source of funding in exchange for generating economic impact.

B. Marketing Strategy

Driving off of the priority of members and marketing partners to benefit from additional business derived from the marketing and promotion efforts of Volcanic Legacy Community Partnership DMO, the overall marketing strategy encompasses consistent deployment of the robust digital marketing and communication program aimed as potential visitors that delivers consistent visitor results, coupled with consistent communication of those results to members and marketing partnerships and others involved in supporting the effort.

C. Communication Plan -Initial Actions

Action Step One: Implement the Digital Marketing Program detailed in Plan Section One.

All eight social media platforms have been established, with Google My Business as the baseline to tally results. An application for the Google Grant which grants \$10,000 a month in Ad Words spending to any non-profit in good standing (but requires meeting the requirements to maintain the grant) will be completed imminently. An animated overview of sites along the Byway is in progress. All social media platforms has been attached to National Travel Center's Hootsuite Social Media Management. The events of the National Park Service locations have been obtained, along with other regional events, on which social media posts will be piggybacked.

Action Step Two: Development of Two Power Point Presentations

- (1) Economic Impact of the Byway
- (2) Marketing Program to Attract Visitors to the Byway

These power points will be appropriate for presenting to potential members and marketing partners and governmental and community officials along the Byway.

Action Step Three: Complete the Database for the 638 Locations Referenced Above

When the database during the Listen to Learn Phase was completed, there were selected locations for which it was challenging to locate an email address, and in some cases, other contact information. This step includes completing location of the contact information these locations in order to make them aware of the proposed marketing program.

Action Step Four: Complete the Database for Local Officials

This step includes updating if needed and completion of the database began in the Listen to Learn Phase for community officials, municipal officials, county officials, and other organizations to which the economic impact power point will be presented.

Action Step Five: Develop the Announcement Communication

Create the first communication announcing the marketing program to attract visitors that makes the offer of membership or marketing partner support, with an appropriate message for email, and social media to be forwarded to the 638 locations. Develop a similar message for a postcard to be the organization for which the only means of communication is their physical mailing address.

Action Step Six: Establish Presentation Dates With Local Officials

Establish dates for Zoom presentations to each organization that can provide financial support in exchange for the delivery of economic impact to their constituents.

Action Step Seven: Engage Visitor California and Travel Oregon

Communicate the program to Visit California and Travel Oregon and determine the extent of the greatest possible support and integration for the VLCP program, including content provided to them on a quarterly basis.

Action Step Eight: Develop An Ongoing Communication Schedule

Based on the results of the above, develop an ongoing consistent communication program and schedule.

D. Digital Marketing Plan Initial Actions

Action Step One - Compile Social Media Platforms

Engage the social media platforms all 638 locations as applicable.

Action Step Two: Create Facebook Group

Create a Facebook Group for VLCP Marketing Activities.

Action Step Three: Create Educational Posts

Develop a schedule of educational posts to assist the locations with their own marketing and how to get the most value through participation with the VLCP marketing programs.

Action Step Four: Reporting on Visitor Attraction Results

Develop a consistent schedule of communicating the results of visitor attraction marketing on a bi-weekly basis throughout the 4 month period the current digital marketing program will encompass.

Action Step Five: Develop Longer Range Digital Marketing Action Program

Based on the results of the above, develop a longer range digital marketing action program.

E. Community Outreach

A further community outreach program will be developed after the six month test and resulting response.

F. Member and Marketing Partner Metrics

The metrics of each communication, be it email, phone, or social media aimed at recruiting members and marketing partners will be tracked from the very beginning. A monthly review of the metrics will point the most effective methods to be pursued.

III. DESTINATION MANAGEMENT PLAN

A plan regarding the current physical condition of the Byway and the actions required to keep it maximally marketable as a visitor experience is imperative. There have been fires, downpours and other weather events that have impacted physical conditions along the Byway, along with other aspects of missing signs, interpretation needing repair, overgrown view sheds needing attention and more in the five years since the Corridor Management Plan was updated.

Without optimum physical conditions along the Byway, there will be no optimum visitor attraction program and no optimum economic impact delivery.

1. The effort to assess and remediate these conditions must begin with a current video record of the entire 500 mile corridor to illustrate the conditions along the Byway available to everyone involved.
2. Establish a plan addressing the priorities along the Byway that must be addressed immediately to improve the marketable condition of the Byway.
3. Within direct discussions with officials from Caltrans and ODOT, identify funding sources from each that can be used to remediate these immediate needs and determine the available grant schedule.
4. Identify other governmental sources from which funding may be available for immediate physical improvements along the Byway and determine the available schedule of these funds.

IV. ORGANIZATIONAL DEVELOPMENT

A. Organizational Structure

Contact an attorney regarding whether or not a DMO with members and marketing partners can be operated within the existing 501c3 of the Volcanic Legacy Community Partnership or if a separate 501c6 for membership must be established. There is currently a New York Byway entity with membership that is a 501c3, but that structure may not apply in California.

B. Funding Plan

The intent is that the VLCP no longer be supported just by grant funding and Discovery guide sales and instead, be funded by members, supporters and others who contribute financially. Thus, the Byway organization funding plan is as follows:

1. Implement the member and marketing partner recruiting effort immediately after the current two month digital marketing test program has concluded. That effort can begin under the current contract with no additional cost, with the possible exception of the as yet undetermined number of post cards that must be sent out.
2. Set the presentations with the various governmental officials for funding on the earliest possible schedule.
3. Initiate three rounds of communications with both databases over the six month period of the digital marketing program.
4. Update and reprint the Discovery Guide and promote online sales.
5. Develop a schedule of any available grants to supplement operational revenues.
6. Based on the results of the above, develop a promotional plan that will render consistent membership and marketing partner generation without dependence on grants.

C. Staffing Plan

It is the intent of the above efforts to generate revenue to support contracting a part-time staff member within a six month period, along with the ability to continue to contract for delivery of the digital marketing efforts. When the VLCP reaches \$100K in revenues from more than one revenue stream, excluding grants, efforts should be made to identify a long-term staff member who can manage and administer a destination marketing organization, including overseeing marketing, even though the hands-on aspect of that activity can continue to be contracted out.

The VLCP should continue to be supported with financial administration until the organization can take over this effort on its own.

D. Operational Plan, Technology and Support Systems Plan

Reaching a level of financial sustainability is going to require technology support to ensure that operations are as efficient as possible.

1. The part time staff member could potentially work remotely somewhere in the area, but will need to be supported with a computer, internet, email, and other communication vehicles that are specifically dedicated to the Volcanic Legacy to deliver the level of legitimacy and credibility needed to attract members and marketing partners willing to contribute funding.
2. Email communication platform.
3. Uncomplicated membership and marketing partner database management system.
4. Zoom capability.

E. Crisis Management Plan

A crisis management plan will be developed based on the locations and level of members and marketing partners that are obtained during the six month test.

F. Advisory Board/Board of Directors

The majority of individuals on the Volcanic Legacy Community Partnership Board have tourism experience and it is not envisioned that an additional advisory committee is needed at this time.