



*Say Hello* **L.O.**  
*Lake Oswego, Oregon*

Lake Oswego Strategic Marketing Plan

Lake Oswego Strategic Marketing Plan  
for the City of Lake Oswego

*Prepared By*



August 2010

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## Lake Oswego Strategic Marketing Plan

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# INTRODUCTION

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## Lake Oswego Strategic Marketing Plan



*In April 2010* the Lake Oswego City Council adopted an Economic Development Strategy, a five-year plan to promote economic health and community vitality. As part of the Strategy Implementation, the City of Lake Oswego contracted with Finkslnc to create a community marketing strategy and implementation program in response to one of four key strategic initiatives: “Market Lake Oswego.”

The resulting marketing plan, as outlined in this report, is built upon the extensive market research and public outreach that occurred in 2009, including a perception survey of Lake Oswego area shoppers, Lake Oswego and Lake Grove retail market studies, and a business needs/organizational assessment. The plan is focused on customer and business attraction and the leveraging of existing and new community events as opportunities to reach target markets and strengthen community. It includes a program of marketing and promotional activities supported by public-private implementation and funding.

The plan was developed in collaboration with the City and the Marketing Task Force, an advisory body of the business community and stakeholders. Additionally, a Focus Group of key communicators from within the community provided valuable insight into developing a brand identity and marketing initiatives.

The principle objectives of the marketing initiative are to support economic development in Lake Oswego, solidify an identity and image concept, develop a unified Lake Oswego marketing strategy, and plan and create business district promotion strategies. The initiative will leverage strategic marketing opportunities such as the Lake Oswego Festival of the Arts and other community events.

***Implementation of the marketing strategy will achieve the following desired outcomes:***

- Increased awareness and enhancement of Lake Oswego's image to its target audiences
- Increased customer traffic to Lake Oswego's business and shopping districts and visits to the community as a whole
- Support of business recruitment and retention efforts

***Specific project objectives include:***

- Business-to-business recruitment
- Enhancing community pride
- Defining values through authentic messaging
- Coordinating with ongoing events as well as outreach and marketing efforts
- Providing measurable results
- Securing community champions
- Supporting local businesses through multiple resources including enhanced tourism to the community.

**With a 2009 population estimated at 37,752 within the city limits,** Lake Oswego is Clackamas County's largest city, expected to grow at 0.59% per year, a slower rate than projected for the Portland, Oregon metro area. Lake Oswego's population is on average older, less diverse, more affluent, and more educated than the population of the Portland metro area. Lake Oswego is located 10 miles south of Portland within a metropolitan area of nearly 2.2 million. The downtown core is somewhat isolated immediately off Hwy 43, five miles east of I-5, and six miles north of I-205. Lake Grove is approximately two miles east of I-5.

Retail activity is focused in downtown Lake Oswego and Lake Grove, each with more than 700,000 square feet of retail space. Neighborhood centers in Palisades, Mountain Park, Westlake, Rosewood and the Kruse Way area offer additional retail choices. A shopper survey conducted in the summer of 2009 indicated that 55% of city residents shop outside of Lake Oswego for goods and services other than gas and groceries. The October 2009 Lake Oswego Retail Market Analysis prepared by Marketek calculates annual leakage of \$537 million of retail sales out of Lake Oswego's market area. With effective business development, Marketek projects that together, downtown and Lake Grove could capture an additional 10% of unmet demand, or the equivalent of an additional 279,300 square feet of retail space.

### ***Task Force and Focus Group Input***

During the course of three months of intense work, the Marketing Task Force and Marketing Focus Group offered input on perceptions and realities related to Lake Oswego's market position. The consensus is that "the lake" is more or less missed in Lake Oswego and the community is perceived by outsiders as an unfriendly place that is difficult to find. These perception issues affect both the "insider" and those outside the community. The Task Force and the Focus Group both reflected some ambivalence about sharing Lake Oswego with outsiders. It is considered by both groups that Lake Oswego is acting in a nimble fashion, having the ability to take advantage of economic recovery (business recruitment, etc.), through a strong sense of community, high income, strong visitor and employee markets and an excellent opportunity for growth over the next 10 years, as examples.

# SITUATION ANALYSIS: KEY FINDINGS

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Lake Oswego Strategic Marketing Plan

## **Community Overview**

At \$84,485 in 2009, Lake Oswego has the highest median family income in the Portland, Oregon metropolitan area. The 2009 median home sale price was \$582,200, also higher than the Portland metropolitan area median.\*

The city has been recognized several times as among “best places to live lists” such as the CNN/Money Magazine Top 100 and best high-income towns.

It boasts a strong community with a highly rated school district and more than 20 neighborhoods each with their own identity. Revealing a sense of place and pride, these factors reflect Lake Oswego’s strengths and ability to reach out and attract visitors to retail, restaurant, arts, community and recreational attractions.

## **Strengths, Weaknesses, Opportunities and Threats**

The Task Force and Focus Group identified and assessed Lake Oswego’s compelling factors as determinants of an overall strategic marketing campaign.

### **Key findings:**

- Lake Oswego’s **strengths** include strong schools, arts, recreational opportunities, sense of place, beauty, community pride and affluence.
- A City’s **weaknesses** include the lack of family-wage jobs, limited affordable housing, a lack of diversity, no regional-draw retailer, a perception of snobbishness from all audiences, and an ambivalence about visitors/tourism from internal audiences.
- **Opportunities** include business diversity, established community events, development of the Foothills District, the Willamette River, connectivity to Lake Grove, public transportation and the potential extension of the Streetcar from Portland.
- Identified **threats** are perception of higher taxes, traffic, lack of public transportation, lack of cohesion from Lake Grove to Lake Oswego to Kruse Way, and an aging population.

\*Source: Marketek, Lake Oswego Market Analysis & Business Development Plan October 2009; Multiple Listing Service (MLS) statistics.

# SITUATION ANALYSIS: KEY FINDINGS

## Lake Oswego Strategic Marketing Plan

### Competitive Analysis

Prior to the current global economic crisis, the Portland metropolitan area marketplace has enjoyed sustained population and economic growth over the course of the past two decades. Most of this growth has occurred outside of Lake Oswego, with urban districts, shopping or cultural attractions improving their offerings at a staggering pace, putting pressure upon communities such as Lake Oswego seeking to remain relevant. As summarized in the following chart, Lake Oswego's competitors have robust marketing programs to attract customers.

The chart below paints a picture of the competitive landscape impacting Lake Oswego.

Competitor	GLA (Gross Leasable Area in sq. ft.)	Estimated Annual Marketing Budget	GLA added within 5+ years	Date GLA added/Notes
Bridgeport Village	502,000	\$300,000	502,000	Lifestyle center opened May 2005. April 2010 announcement that Saks Fifth Ave.'s discount concept Off 5th will join retail line-up. Closure of Carl Greve Jewelers occurred in Feb. 2010.
Clackamas Town Center	1,482,418	\$750,000	250,000	Expansion opened late in 2007 bringing Claim Jumper, Romano's Macaroni Grill, Macy's Home Store and others into newly built lifestyle village format. TriMet Max Green Line opened in September 2009 with connection into downtown PDX. Recent opening of 20-screen Century Theatres.
Downtown PDX & Pearl District	2,900,000	\$1,353,054	20,000	Significant public-private investment of \$1.5 billion included new TriMet Green Line, renovated Transit Mall, and reinvestment into hotels such as The Nines and Marriott and retailers such as Macy's, Mercantile and Carl Greve Jewelers in '07-'09. July 2010 closure of Saks Fifth Ave.
Lloyd Center	1,475,460	\$750,000	60,000	Expansion completed in 2005 included Barnes & Noble and updated Newport Seafood Grill.
Pioneer Place (Downtown PDX)	306,000	\$250,000	n/a	Recent additions of new-to-market retailers include Juicy Couture, True Religion, Betsey Johnson and announcement of H & M occurred '08-'10. Saks Fifth Avenue closed July 2010.
Streets of Tanasbourne	400,000	\$250,000	400,000	Center opened in late 2004 with a tenant line-up that includes Macy's, PF Chang's, REI, Banana Republic and others.
Washington Square	1,458,840	\$800,000	100,000	Expansion completed Nov. 2005 added 28 new stores including Pottery Barn Kids, The Cheesecake Factory and more.
	<b>8,524,718</b>	<b>\$4,453,054</b>	<b>1,332,000</b>	

# STRATEGIC OBJECTIVES

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## Lake Oswego Strategic Marketing Plan

### *Plan Overview*

The Lake Oswego Strategic Marketing Plan articulates a course of action that supports Lake Oswego's economic future through a branding, marketing, advertising and outreach campaign. By highlighting Lake Oswego's gems such as the arts, recreational opportunities, sense of place, friendliness and community pride, as well as retail, restaurant and business opportunities, the marketing campaign will overcome perceptions that Lake Oswego is aloof or ambivalent about visitors, and in fact welcomes shoppers, diners, "recreators," families and business. The overall strategy is tailored to Lake Oswego's desire to be known as welcoming, vibrant, and alive with opportunity and beauty.

The plan is premised on strong community partnerships. These partnerships ensure efficient and effective community marketing to benefit multiple users. Partners include, but are not limited to the City of Lake Oswego, Lake Oswego Chamber of Commerce, Marylhurst University, the Lakewood Center for the Arts, the Arts Council, media and businesses.

### **Brand**

Any brand is a set of perceptions and images that represent a destination such as Lake Oswego and/or a company, product or service. A brand is the essence or promise of what will be delivered or experienced.

Importantly, a brand enables a “user” of Lake Oswego to easily identify its offerings.

### **Lake Oswego’s brand will further develop over time through:**

- Consistent messaging via advertising, graphics, events, etc.
- Recommendations from friends, family members or colleagues
- Interactions with Lake Oswego and its representatives (e.g., businesses)
- Real-life experiences using/visiting Lake Oswego (generally considered the most important element of establishing a brand)

As developed, the brand provides an umbrella under which many different experiences or products can be offered—providing Lake Oswego with tremendous economic leverage and strategic advantage in generating awareness of its offerings in the marketplace.

Through research, SWOT analysis, competitive analysis, focus group study and feedback from the Marketing Task Force “Say Hello to L.O.” emerged as our brand supporting tagline. Negative perceptions held within and outside the community colored Lake Oswego as unfriendly, isolated and overly expensive. However, the reality is far different. We discovered that Lake Oswego is a vital, authentic, beautiful, engaging, artistic, family-focused, and friendly community. The tagline “Say Hello to L.O.” speaks to the aforementioned key attributes succinctly, counters negative perceptions, provides a “call-to-action” and serves as an “exclamation point” for the Lake Oswego “story” to unfold over the next 1-3 years.

*Say Hello* **L.O.**  
*to*  
*Lake Oswego, Oregon*

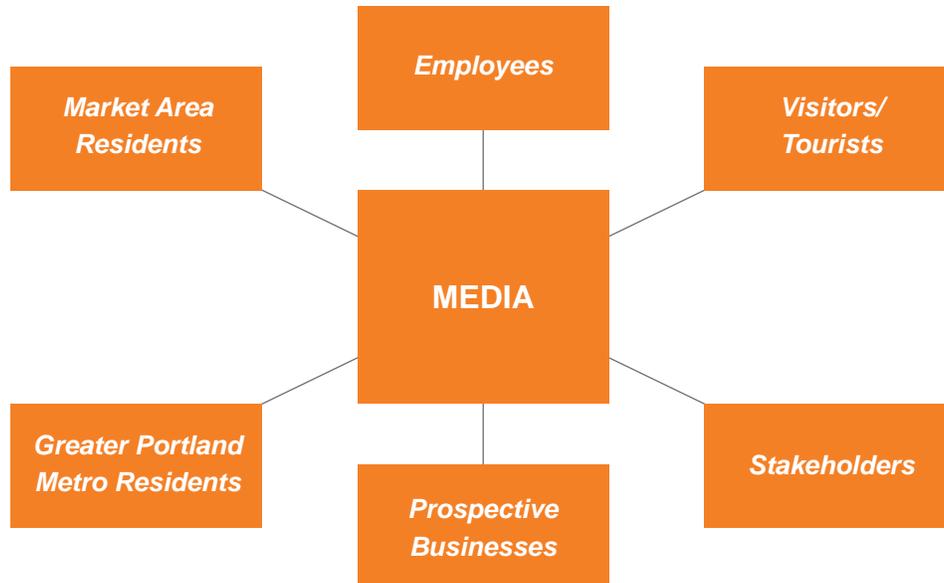
*Say Hello* **L.O.**  
*to*  
*Lake Oswego, Oregon*

Say Hello **L.O.**  
Lake Oswego, Oregon



# TARGET AUDIENCE & CUSTOMER SEGMENTS

Lake Oswego Strategic Marketing Plan



The overall marketing and branding campaign focuses on the four distinct market segments that generate traffic and sales: local/downtown Lake Oswego employees, local area residents, metro area residents and visitors. It also targets prospective business for Lake Oswego's retail and commercial districts.

## The following represents the breakdown of population and income for each segment:

- Local Employees: More than 30,000 within the Lake Oswego market area.
- Market Area Residents: 55,827 households with a median income of \$73,717\*
- Portland Market Statistical Area (MSA) has 857,304 households with a median income of \$62,000.
- Visitors: Income of \$60,000+ and average expenditures of \$100 per visit (capture rate of segment for Lake Oswego undetermined)

Sources: Lake Oswego Retail Market Analysis, conducted by Marketek, October 2009.  
U.S. Department of Commerce, Travel Portland, U.S. Census Bureau.

\*Market area extends beyond Lake Oswego's City Limits.

### **Strategies**

**The following strategies provide year-round marketing support with three seasonal thrusts at holiday, winter (first quarter) and in conjunction with summer events.**

1. Establish stable funding and a comprehensive sponsorship program comprised of cash, media and in-kind. Leverage partnerships with community organizations such as Marylhurst University, Lakewood Center, Arts Council, etc.
2. Develop an overall marketing and branding ad campaign for Lake Oswego focusing on target market segments.
3. Utilize public relations to generate a “buzz” around Lake Oswego regionally and nationally to support both business-to-business and consumer marketing efforts.
4. Create reasons for local and regional resident visits and increase frequency of visits.
5. Leverage large-scale events through partnerships and capture of generated pedestrian traffic.
6. Build one-on-one marketing relationships with current and potential target audiences.
7. Create connections between Lake Oswego business districts for all offerings and experiences.
8. Develop and implement a comprehensive Visitor and Tourism Program to ensure every visitor understands what Lake Oswego offers and how offerings may be accessed. (This program will support and not replace regional visitor marketing efforts.)
9. Increase usage of existing amenities and events by telling the Lake Oswego story. Create multiple uses for each visit.
10. Develop and implement a business-to-business (support and recruitment) marketing program.
11. Develop an employee strategy to increase the number of visits to business districts and create awareness of retail and restaurant news on an ongoing basis.

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- 12.** Create and market a website tool to drive retail, restaurant and cultural/amenity usage for all targets from local and regional residents/employees to visitors/tourists.
- 13.** Enhance connection to Oswego Lake, the Willamette River, parks and other recreational and cultural attractions.
- 14.** Develop a local resident loyalty, frequent visit/shop strategy.
- 15.** Convert pedestrian traffic to “users” in order to generate multiple-use visits.

### **Organization and Funding**

As an interim organization, pending creation of a permanent structure, it is recommended that the City continue to lead the marketing initiative in a private-public partnership with corporate sponsors to kick-start this program.

In the first year, a Marketing Advisory Council made up of stakeholders from appropriate sectors will meet at least quarterly, including an annual planning meeting. Both strategic and day-to-day management will be outsourced to a professional marketing services provider who is experienced in destination and urban places marketing.

In years two and three, potential sources of funding include the City of Lake Oswego, sponsors and an assessment on business owners known as an Economic Improvement District (EID), or an assessment on property owners known as a Business Improvement District (BID), that could generate approximately \$100,000 to support the campaign. With the creation of the EID/BID, there would be a stable organizational entity and funding resource to drive the marketing effort along with other initiatives as determined by the EID/BID. In the interim, a Marketing Advisory Council will continue to serve as a guide and provide “on the ground” feedback and input on implementation of the overarching strategies.

# STRATEGIES & BUDGETS: STRATEGY 1

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## Lake Oswego Strategic Marketing Plan

### ***Plan Strategies***

Year-long marketing plan supported by aforementioned seasonal thrusts and marketing mediums as follows-

***Strategy #1: Establish stable funding and a comprehensive sponsorship program comprising of cash, media and in-kind. Element total estimated to be \$151,000 - \$300,000.***

Potential sources of funding include:

- City of Lake Oswego: **\$50,000 for FY 2010-11**; future years subject to City budget approval.
- Corporate Partners: **\$100,000 targeted for year 1**.
- Economic Improvement District (EID) or Business Improvement District (BID): Formation by community FY 2010-2011; **revenues of approximately \$100,000 beginning 2011-12**. Services to include marketing and other as determined by EID/BID.
- Media/In-kind: KINK-FM radio, KGW, Lake Oswego Review and others.
- Clackamas County Tourism Grant administered by Lake Oswego Chamber of Commerce: **\$15-\$20,000 in year 1**
- Existing Community Event Budgets Round-Robin:  
Potential collaboration with community organizations to identify budgets used to market community events and commit a portion to a cooperative budget pooled and dedicated to the Lake Oswego Marketing Initiative.

# STRATEGIES & BUDGETS: STRATEGY 2

## Lake Oswego Strategic Marketing Plan

### **Strategy #2: Develop an overall marketing and branding ad campaign for Lake Oswego focusing on the market segments.**

- Use “Say Hello to L.O.” as a marketing & branding plan.
- Create design guide/template for partners.
- Produce radio spots in - 15 and 30-second format for promotional, seasonal or events.
- Produce television spot - 10 second banner and 30 second format “Say Hello to L.O.”
- Develop print ad, establish template for various uses; includes design, photography and usage.

### **PRINT AD SAMPLE**



# STRATEGIES & BUDGETS: STRATEGY 3

## Lake Oswego Strategic Marketing Plan

**Strategy #3: Utilize Public Relations to generate a “buzz” around Lake Oswego regionally and nationally to support both business-to-business and consumer marketing efforts.**

- Develop Public Relations plan and key messages.
- Define monthly and seasonal campaigns and timeline.
- Develop press kit materials; includes electronic versions for online press room.
- Develop campaign materials: press releases, pitches, etc.
- Implement campaigns and provide day-to-day media relations as needed.
- Monitor media and provide monthly report on media coverage.
- Provide half-day media training and coaching for spokespeople.
- Social media: Support PR campaigns and messaging using social media channels.
- Develop social media strategy and implementation plan, including:
  - blog
  - Facebook
  - Twitter
  - Flickr
  - LinkedIn (for B2B targets)



**1,909 FOLLOWERS**

**1,726 PEOPLE LIKE THIS**

**SOCIAL MEDIA SAMPLES**  
Rational Engagement &  
Consumer Conversation on  
Facebook & Twitter

The image displays two social media screenshots. The top one is a Twitter profile for 'inLakeOswego' showing a post about free downtown activities and a follower count of 1,909. The bottom one is a Facebook post from 'Lake Oswego' with 1,726 likes and several comments. Orange callout boxes and lines connect the follower and like counts to their respective data points in the screenshots.

# STRATEGIES & BUDGETS: STRATEGY 4

## Lake Oswego Strategic Marketing Plan

### **Strategy #4: Create reasons for local and regional residents visits and increase frequency of their visits.**

- LO Magazine/Special Publication, PR and promotions.
- Partnership between Lake Oswego Review, Lake Oswego Chamber of Commerce/ Clackamas Tourism, City of Lake Oswego & businesses.
- Develop media partnership and business cooperative program to publish a monthly specialty publication including Lake Oswego business news, events, shopping maps and “dining around” Lake Oswego. Recommend partnering with City of Lake Oswego and investigate incorporating “Say Hello to L.O.” into format.
  - Distribution – 100% coverage of Lake Oswego single-family homes.
  - Production of 27,000 copies.
  - 16,000 copies will be delivered to subscribers of the Lake Oswego Review, West Linn Tidings and The Times serving Tigard and Tualatin.
  - 8,000 copies will be mailed to non-subscribers of the Lake Oswego Review. Single-family homes in 97034, 97035 and 97219 will receive copies.
  - 3,000-5,000 copies will be produced and distributed around Lake Oswego and/or the Visitor Information Center at Pioneer Courthouse Square in downtown Portland as counter copies.
  - Up to 40% ad discount to participating businesses.
- Public Relations Support.
- Define “stories” and media coverage opportunities that highlight compelling reasons for people to spend time in downtown Lake Oswego and incorporate these opportunities into overall PR, website and social media efforts, media campaigns, and partnerships with KINK and KGW, Pamplin, etc.
- Develop seasonal promotional materials to include tent cards, fliers or posters. Template for three promotional thrusts per year.
- Design and implement promotions.
  - Summer: Arts/Farmers Market/Super Saturdays (Subject to city code. Scheduled monthly with businesses doors open, tables on sidewalk, additional signage, etc.).
  - February-March: a Lake Oswego “food & wine event”.
  - Holiday Open House

**Strategy #5: Leverage large-scale events through partnerships and capture of generated pedestrian traffic.**

- Host Lake Oswego booth at every major event and stock with maps, publications and business “bounce-backs” that are timed to create sense of urgency. Partner with high schools to staff booths for intern credits and partners such as the Lakewood Center for the Arts, Arts Council and Marylhurst University.



**SAMPLE HOLIDAY GRAPHIC SYSTEM AND APPLICATION**

- Encourages purchase
- Bag/package tag
- Window clings

- During events, deploy a roaming downtown concierge who gives inside tips for things to do in L.O. Arm with a satchel of brochures. Partner with high schools to staff for intern credits.

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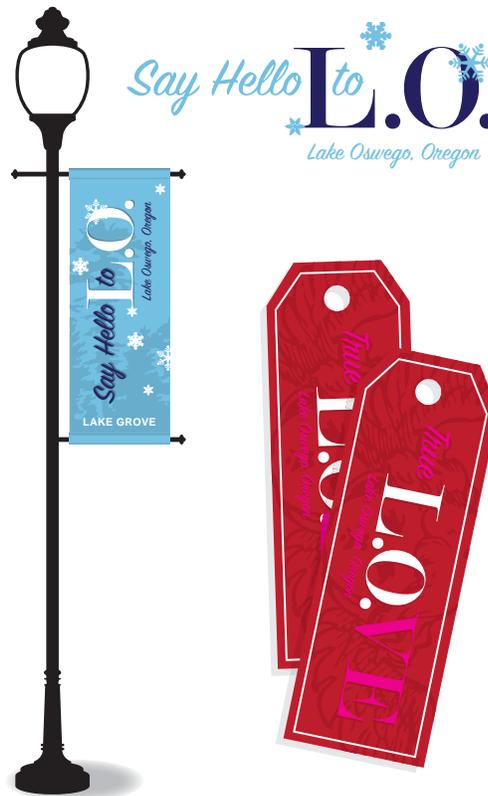
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- Public Relations Support  
Publicize events through overall PR, Lake Oswego Review specialty publication, website, e-newsletter and social media efforts and tie to Lake Oswego businesses (e.g., in-store events, etc.).  
Leverage large-scale events through partnerships and capture of generated pedestrian traffic.



### **SAMPLE PRINT AND EVENTS**

Encourages purchase and visits



# STRATEGIES & BUDGETS: STRATEGY 6

Lake Oswego Strategic Marketing Plan

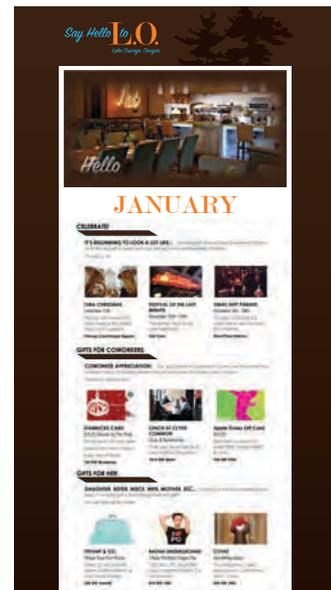
## **Strategy #6: Build one-on-one marketing relationships with current and potential users.**

- Develop an iPhone/smart phone app to provide directory, mapping, event calendar/reminder, “deal of the day” or similar feature.
- Establish e-mail marketing program.
- Work with retailers and service providers to build an email marketing database; promote e-newsletter sign-up through website and social media; develop point-of-purchase material to promote sign-up; segment database according to interests (restaurants, shopping, the arts, services, etc.)
- Develop newsletter content for targeted market segments.
- Review providers for e-mail marketing services and offer recommendation.
- Manage e-mail marketing campaigns using selected provider.
- Develop newsletter content for targeted market segments.
- Create a monthly e-newsletter campaign. Produce and launch campaigns and track results; make necessary adjustments.
- E-commerce - Segment database according to interests. (restaurants, shopping, the arts, services, etc.)
- Develop newsletter content for targeted market segments.
- Manage e-mail marketing campaigns using selected provider.



### **APP SAMPLES AND MONTHLY E-CAMPAIGN**

Rational engagement  
Sales conversion and dialogue



***Strategy #7: Create connections between Lake Oswego business districts for all offerings and experiences (e.g., Kruse Way, arts & culture, etc.).***

- Create several self-guided tours based on a certain theme—print and/or post on website. Each tour would include “stops” at numerous businesses within the area. Tours would include stops from downtown and Lake Grove districts. Examples could include “Girls Night Out,” “Epicurean Adventures,” “Nature Lovers,” “Battling Teenager Boredom,” “Spa Day,” etc.
- Banner program (see branding)
- Incorporate all districts into marketing and PR materials, website and social media to highlight amenities and attractions found in each “mini zone.”
- Create and produce a printed visitors guide within Lake Oswego Review specialized publication that highlights the businesses, services and attractions particular to Lake Oswego “mini zones.” Overruns of this specialized monthly publication will also be offered inside local businesses.

## STRATEGIES & BUDGETS: STRATEGY 8 & 9

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Lake Oswego Strategic Marketing Plan

***Strategy #8: Develop and implement a comprehensive Visitor and Tourism Program targeting visitors from local area and outside a 50-mile radius. Ensure every visitor understands what Lake Oswego offers and how these offerings may be accessed. This program will support and not replace regional visitor marketing efforts.***

- Lake Oswego “fam” tours (familiarization tours) to be determined based upon sponsorships.
- Join and partner with Clackamas County Tourism, Travel Portland, and Travel Oregon to take advantage of tourism programs such as GoSeeTell, Portland Perks and “Fam Tours,” and to leverage social media.
- Support specialized Lake Oswego Review publication containing maps, attractions, things to do, etc.
- Create seasonal hotel packages—summer arts, holiday, wine and food—and promote with website, public relations, and partners such as Lake Oswego Chamber, Clackamas County, Travel Portland and Travel Oregon.

***Strategy #9: Market and increase usage of all existing amenities by telling the Lake Oswego story and creating multiple uses for each visit, supported by the following:***

- Robust PR program
- Specialized publication via Lake Oswego Review partnership
- Website
- Social media
- E-newsletter
- Advertising
- Graphics support system
- Collateral specialized publication, map

***Strategy #10: Develop and implement a business support & recruitment marketing program.***

- Develop a press kit targeted at businesses considering a move to Lake Oswego, including a fact sheet, FAQ, quote/testimonial sheet, etc.
- Provide electronic versions of press materials for website.
- Post slide presentation about Lake Oswego on SlideShare and/or Scribd.
- Develop strategy and implementation plan for LinkedIn presence.
- Coordinate with City Public Affairs and Lake Oswego Chamber of Commerce to celebrate new business with mayor ribbon cutting and synchronize this program within the overall campaign tools including news release, website and special publications.
- Incorporate pitches regarding business, retail and innovations, new development, new tenants, etc.
- Coordinate with City Economic Development Program to create a prospect list for businesses to recruit, deliver a “case for L.O.” to them and offer a personal invitation to visit from the mayor.

***Strategy #11: Develop an employee strategy to increase the number of visits to business districts and create awareness of retail and restaurant news on an ongoing basis.***

- Example: “Who says there’s no free lunch?” or “The Third Wheel”: Buy two and get third lunch free. Simply show business card with LO address. Mondays-Wednesdays 11 a.m. to 1 p.m.
- Promote through employers and building management companies. Monthly distribution of lobby-area tent card.
- Establish an employee Friends & Family program and drive with e-newsletter and website and mobile app.
- Establish employee/worker segment within e-mail marketing program; produce separate campaigns—special deals and offers just for this target.
- Distribute Lake Oswego Review specialized publications to building lobbies.
- Organize and partner with Lake Oswego Chamber of Commerce for quarterly “meet-up” style mixers for Lake Oswego-based workers and employees and/or incorporate a reception or other party that takes place as part of a larger event or festival.

***Strategy #12: Utilize/create and market a website tool to drive retail, restaurant and cultural/amenity usage for all targets from local and regional residents/employees to visitors/tourists. The URL will be on everything.***

- Develop website with navigation (mapping) feature, events calendar, searchable directory/listing by names and category, press room, arts/lake streaming imagery, headliner promo on home page, news/press room, deals, where to eat, hot tips, like to join e-newsletter and social media, etc.

***Strategy #13: Enhance connection to Oswego Lake, the Willamette River, parks and other recreational and cultural attractions.***

- Partner with the Oswego Heritage Council and Lake Corporation during classic boat show to provide controlled sightseeing boat rides for the public.
- Coordinate messaging with City, Parks, Lake Corporation and others during lake drawn down.
- Investigate summer floating “drive-in” movie for Lakewood Bay during summer 2011.
- Highlight access to lake through social media and website photo gallery.
- Highlight lake in social media channels such as Twitter, Facebook and YouTube, create a “Lake Cam” in a more public area, etc.
- Highlight lake in Lake Oswego Review publication and other channels.

***Strategy #14: Develop a local resident loyalty, frequent visit/shop strategy.***

- Design for 970LO card (either virtual through mobile app with encrypted sign-up or on printed cards). Tie into website for offering special events. Example: L.O. residents get two prix-fixe dinners for \$25 at Tucci’s 5-7 pm on Wednesday nights. Also include trunk shows, etc. Show card or ID with address. Promote in specialized publication.

***Strategy #15: Convert pedestrian traffic to “users” in order to generate multiple-use visits from every customer.***

- Seasonal window and bag graphics system.
- Window/door clings and bag tags. Three changes to include Holiday, Spring, Summer.
- Specialized publication.
- Complimentary retail graduate school.

### **Primary Measurements**

Baselines will be established and the effectiveness of the marketing program will be measured as follows:

1. Perception surveys: Conduct an annual consumer survey to measure perceptions of key issues and campaign recall. As appropriate, leverage other relevant research
2. Positive Media Placement: Earn positive media placement in regional and/or national media. Results are measured in the form of ad equivalency and/or public relations value and based upon PRSA (Public Relations Society of American) best practices.
3. Paid Media Reach and frequency/ROI on media investment
4. New business recruitment
5. Online initiatives
  - a. Website
    - i. Traffic (user sessions)
    - ii. Engagement
      1. Time spent on site
      2. In major sections of the site, identify conversion points and establish baseline measurements
  - b. E-newsletters
    - i. Subscription numbers
    - ii. Engagement
      1. Open rates
      2. Click-through rates
  - c. Social media: identify benchmark measurements (e.g. subscribers, members/followers or posts)

### **Secondary Barometers**

1. Promotional response (e.g. offer redemptions, business participation)
2. Event attendance
3. Anecdotal retail performance and shopper survey
4. Future/Other- explore measuring increase of LO usage and average spending (would require distinct market research).

# BUDGET CONSIDERATIONS: SCENARIO A - RECOMMENDED

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Lake Oswego Strategic Marketing Plan

**Budget Scenario A-Recommended**

Website	\$30,000	
E-Campaign	12,000	
Graphics	12,000	
Banner Program	10,000	
Mobile App	10,000	
Collateral	8,000	
PR	24,000	(16 hours per month)
Social Media	15,000	
Marketing Management, Direction and Outreach	80,000	(53.3 hours per month)
Sponsorship Outreach	15,000	(13.3 hours per month)
Co-op Program	20,000	
Media	50,000	
Promotions	14,000	
<b>Total</b>	<b>\$300,000</b>	

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# BUDGET CONSIDERATIONS: SCENARIO A - RECOMMENDED

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Lake Oswego Strategic Marketing Plan

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## **Budget Scenario A-Recommended Overview**

Substantive 12-month program to support three seasonal thrusts with media as identified in Lake Oswego Strategic Marketing Plan noted as follows-

- WEBSITE: Ongoing program includes turn-key website (development, store directory, online navigation tools, maintenance, etc.).
- MOBILE APPLICATION: Ongoing mobile application program.
- MARKETING MANAGEMENT: Ongoing marketing management and program support (53.3 hours per month).
- SPONSORSHIP CULTIVATION: Ongoing sponsorship cultivation/outreach program (13.3 hours per month).
- PUBLIC RELATIONS SUPPORT Ongoing PR support (16 hours per month).
- MONTHLY E-NEWSLETTER
- SOCIAL MEDIA SUPPORT: Monthly social media support (several posts per month).
- SPECIAL PUBLICATION: Monthly Lake Oswego Review/Hello L.O. monthly publication with business co-op program.
- BANNER & GRAPHICS PACKAGE: Seasonal banner and seasonal graphics package.
- SEASONAL COLLATERAL: Seasonal collateral materials package.
- MEDIA CAMPAIGN: Seasonal media support/campaign (e.g. TV, radio).
- SEASONAL PROMOTIONS (holiday, winter and summer)

# BUDGET CONSIDERATIONS: SCENARIO B

Lake Oswego Strategic Marketing Plan

**Budget Scenario B**

Website	\$25,000	
E-Campaign	12,000	
Graphics	5,000	(Holiday only)
Banner Program	5,000	
Mobile App	Postpone	(Until year 2 or 3)
Collateral	5,000	
PR	6,500	(52 hours near holiday)
Social Media	10,000	(Abbreviated Program)
Marketing Management and Direction	30,000	(20 hours per month)
Sponsorship Outreach	15,000	(13.3 hours per month)
Co-op Program	10,000	
Media	20,000	
Promotions	7,500	
<b>Total</b>	<b>\$151,000</b>	

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# BUDGET CONSIDERATIONS: SCENARIO B

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Lake Oswego Strategic Marketing Plan

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## **Budget Scenario B Overview**

Abbreviated program from “Scenario A” (recommended) noted as follows-

- WESBITE: Reduced from “Scenario A” (minimize scope/delay or eliminate features). Program includes turn-key website (development, store directory, online navigation tools, maintenance, etc.).
- MARKETING MANAGEMENT: Reduced from “Scenario A” (20 hours per month). Ongoing marketing management and program support.
- SPONSORSHIP CULTIVATION: Maintained from “Scenario A” (13.3 hours per month). Ongoing sponsorship cultivation/outreach program.
- PR SUPPORT: Reduced program from “Scenario A” (52 hours during holiday season).
- MONTHLY E-NEWSLETTER: Maintain from “Scenario A.” Monthly e-newsletter program.
- SOCIAL MEDIA SUPPORT: Reduced from “Scenario A.” Posting activity reduced 30% for monthly social media program.
- SPECIAL PUBLICATION: Reduced from “Scenario A.” (6 times per year)- Lake Oswego Review/Hello L.O. monthly publication with business co-op program.
- BANNER & GRAPHICS PACKAGE: Reduced from “Scenario A” (holiday season only)- Banner and seasonal graphics program.