

TOUR OF MISSOURI®

September 11-16, 2007



2007 Annual Report

About the Tour

The Tour of Missouri, an annual event initiated by the State of Missouri under the leadership of Governor Matt Blunt and Lt. Governor Peter Kinder, is a top-level elite professional cycling race designed to showcase the state. Planning stages of the inaugural year were led by the Office of the Governor and Lt. Governor working in conjunction with Missouri Division of Tourism and key state agencies. Primary responsibilities of this planning team were to encourage the participation and cooperation of communities and private sponsors statewide while assisting in event development, promotion, operations and logistics. The State developed the organizational structure necessary for this public/private partnership under Hawthorn Foundation and secured the services of Medalist Sports, the premier professional cycling race production company in the U.S., as the management contractor of the event. As a six-day mobile festival taking place in nine host communities across the state, for Missouri it is an event unprecedented in size and scale.

Acquiring the resources and talent to launch this massive project presented the largest challenge. For Hawthorn Foundation, state agencies, sponsors, vendors and local organizing committees (LOCs), this event represents over a year and a half of extensive coordination and public/private cooperation. During the process there were over 25 planning team members, 35 sponsors, 300 local organizing committee volunteers, and 1800 race week volunteers. The event brought communities together instilling a sense of pride and accomplishment while playing a pivotal role in presenting Missouri as a great location for cycling, outdoor sports and recreation.



Management

Hawthorn Foundation, a 501C6 organization established for marketing and promotion of Missouri, is the umbrella organization for the Tour of Missouri. Medalist Sports, LLC, is contracted to manage the production of the event and coordination with each of the host cities. KOM Sports Marketing working under Medalist Sports provides promotion and advertising services that are coordinated with the State and LOC marketing efforts. Each host city has a Local Organizing Committee for the purpose of securing local sponsorships, working with the statewide planning team and developing ancillary activities.

Resources

Sponsors are the key to seeing this event from a vision to reality. Sponsors working with Hawthorn Foundation, state leadership and key state agencies activated marketing campaigns and public relations projects that made the Tour of Missouri a tremendous success. It is a new tradition that will raise awareness of the great opportunities in Missouri. Missourians will be able to rally around this event each year and show their support. It is a magnificent reason to get outdoors, travel, be healthy, active and proud of Missouri as host of an internationally recognized event.

Marketing

Advertising, public relations, broadcast and the Internet were utilized in communication and promotion of the Tour of Missouri. The campaign began in October 2006 with the Governor's announcement of the Tour of Missouri introducing Medalist Sports and KOM Sports Marketing. A second announcement came in February 2007 outlining the Tour of Missouri Stages 1-6 and the host cities. During spring and summer 2007, printed brochures, posters, banners and the website were launched through the State and Local Organizing Committees. Additional distribution of collateral material was handled through KOM Sports Marketing, local bicycle retailers, bicycle organizations, and the Convention and Visitors Bureaus. Pre-event advertising and public relations took place during July and August 2007 with the addition of radio PSAs, television spots, billboards, press tours, local radio advertising and special giveaway promotions. Race week included an integrated marketing mix of printed event guides and event maps, radio commercials, the television preview show, retail premium items, and the online webcast of the event live.

In addition to the traditional marketing, an educational program was available to schools. Schools in host communities receive educational booklets with fun activities for kids to do in learning about cycling and the Tour. The booklet was also available online at tourofmissouri.com as a downloadable file.

The Tour of Missouri invited media to follow the race. Media workrooms were available at each finish city with free internet access and onsite assistance. An FTP site was developed to provide easy access to photos, press releases and additional information about the race. Credentials were available through KOM Sports Marketing and the website



Mission

To launch a top-level, elite cycling race showcasing the state

Goals

- To position Missouri as a new venue in cycling.
- To garner publicity and media coverage.
- To promote tourism, wellness, agricultural and urban amenities, transportation, economic development and quality of life opportunities statewide.

Objectives

- Increase visitation
- Increase household travel party expenditures
- Increase advertising
- Increase media coverage
- Increase partnerships

Results

Economic Impact

The inaugural Tour of Missouri professional cycling race was held September 11-16, 2007. The six stage event consisted of 15 professional bicycle teams with eight riders on each team covering approximately 600 miles. The event began on Tuesday, September 11th, with an out-and-back race in Kansas City. The second stage, on Wednesday, September 12th, was a road race from Clinton to Springfield. The third stage, on Thursday, September 13th, was a time trial in Branson, with the start at the Landing and the finish at Shepherd of the Hills. The fourth stage was from Lebanon to Columbia. The fifth stage was from Jefferson City to St. Charles and the sixth and final stage was held in St. Louis.

Research conducted by the University of Missouri Tourism Economic Research Initiative (TERI) utilizes estimates of total number of stage spectators from Missouri Highway Patrol, Medalist Sports and event organizers for overall results. TERI conducted an economic analysis of Tour of Missouri spectators at the immediate area around the start and finish lines for start/finish line results, but did not attempt to survey or estimate crowd sizes along the entire six hundred miles. The overall results represent global estimates while the start and finish line results are a subset of the overall estimates.





Overall Results

The Tour of Missouri was an overwhelming success. The estimated number of spectators totaled 367,566 with 255,529 unique stage spectators, which is extremely good bearing in mind it was a first-year event. The \$26.2M in tourism expenditures is outstanding, especially considering 2007 Tour de Georgia had approximately 515,000 spectators and \$27.5M in expenditures. Missouri in comparison to Georgia had approximately 71% of the spectators and 95% of the tourism expenditures in the first year.

The Tour attracted high-value visitors. Household travel parties averaged 2.05 people spending \$560.85. In FYO6, average expenditures by domestic travelers in Missouri (per household travel party) were \$307.25. Also, the median household income of Tour of Missouri spectators (\$85K-\$102K) compares favorably to FYO6 households traveling to Missouri at (\$47.5K-\$50K). This could mean more potential for increasing travel expenditures in the future.

Overall Visitation

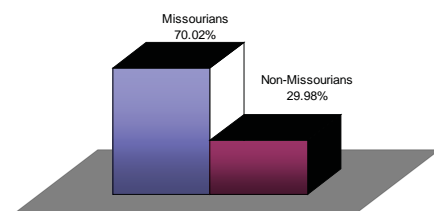
- An estimated total of 367,566 spectators saw the Tour of Missouri at some time during the six stages, either in the start city at the beginning of the stage, the finish city at the end of the stage, or along the route
- St. Louis is estimated to have hosted the most spectators at the beginning or end of a stage, with an estimated 50,000 at the end of the sixth and final stage of the Tour. This was followed by St. Charles, with an estimated 45,000 spectators at the end of the fifth stage. Almost 1/3 of the overall spectators during the six stages were somewhere along the course, at sites other than host cities.

- Taking into account that some people attended multiple stage beginnings or endings, the overall number of unique stage spectators is estimated to be 255,529.
- An estimated 76,596 unique stage spectators were from outside of Missouri.

Overall Expenditures

- ***The overall out-of-state stage spectators spent an estimated \$21.1 million while visiting Missouri. Non-local Missourians (those living more than 50 miles or more from the venue) spent an estimated \$5.1M during the Tour of Missouri bringing the total economic impact to \$26.2M.***
- Of the nine cities that hosted beginnings and/or endings of stages, overall spending in those cities by non-local Missourians or non-Missourians averaged \$2.1 million. Kansas City had the largest total, \$5.9 million. This was followed by St. Louis with \$5.4 million, St. Charles with \$3.3 million and Branson with \$2.0 million.

Total Estimated Number of Spectators = 367,566
(Total Number of Unique Spectators = 255,529)





Start/Finish Line Results

The primary sources of information were web and word of mouth. This could be a perfect target audience for viral marketing. It is beneficial to know that low-cost marketing had the greatest impact.

- On average, 28.2% of the start/finish line spectators that came from outside the local area reported they had not visited the local area within the past five years. Lebanon had the highest percentage (55.5%), followed by Clinton (50.2%) and Springfield (27.9%).

Household Travel Party Spending - Higher than Average.-

- The out-of-state start and finish line spectators spent an estimated \$3.8 million while visiting Missouri. Their household travel parties averaged 2.05 people and spent \$563.32 while traveling in the state.

Reason for Visiting is the Tour of Missouri - 73% say YES!-

- 25.6% of the out-state respondents stated they had not visited the interview site within the past five years. 73% said the Tour of Missouri was very important or extremely important in planning their trip.

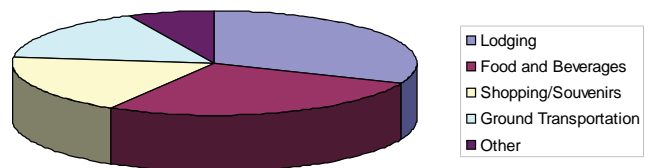
Median Household Income - Higher than Average.-

- The out-of-state visitors came from households with a median household income of \$85,000-\$120,000. This compares favorably to a median household income of only \$47,500-\$50,000 for households traveling to Missouri during fiscal year 2006 (July 2005 – June 2006).

Point of Origin for Visitors Vary.-

- On average, 41.8% of the start/finish line spectators came from outside the local area. Kansas City had the highest percentage (60.19%), followed by Branson (59.24%) and St. Charles (48.23%).

Average Expenditures in Missouri
per Household Travel Party
Total=\$560.85



Source: "The Economic Impact of the 2007 Tour of Missouri" - Tourism Economics Research Initiative (TERI) at the University of Missouri - Columbia

Marketing Results

Television

Television Viewership

- Estimated total audience = 22,038,039
- Estimated publicity value = \$988, 227.00

Television Coverage

- Versus Network - 2 hours estimated audience of 800,000
- VNR feeds - 44 countries
- VNR feeds - 13 states used coverage - Includes affiliates in Missouri, Kansas, Illinois, Iowa, Nebraska, Colorado, California, Tennessee, South Carolina, Minnesota, Wisconsin, Indiana and Montana
- 10 live local remotes by affiliates - Includes three in Kansas City for Stage 1.
- KMOV- St. Louis, live daily reports
- 30-minute preview show in five markets



Radio

- 67 radio stations provided race coverage with 80% in-state
- 15 official radio stations in 9 host city markets
- 7 consecutive days of daily reports in Kansas City, Springfield and Columbia
- 23 hours aggregated coverage (est.)
- 10 live remotes at finish lines
- 15 hours of estimated air time for 10 vignettes on 23 radio stations

Newspaper

Advertising Equivalency

- Circulation = 20,326,939
- Readership = 46,751, 959
- Advertising Equivalency = \$1,110,334.67

Newspaper Coverage

- 425 million impressions
- USA Today
- Los Angeles Times
- Chicago Tribune
- NY Times
- St. Louis Post
- Kansas City Star
- Columbia Tribune
- Jefferson City Tribune
- St. Charles Journal
- Lebanon Daily News
- Clinton Daily News
- Rural Missourian
- Top sports story in stage host cities
- Special sections in St. Louis, Columbia, Kansas City, Jefferson City and Springfield



Cycling Specific Media

- Velonews
- Cycling Magazine
- The Daily Peloton
- ESPN.com
- Team websites (EX: Toyota-United.com)

Online

- Sites providing coverage of the Tour of Missouri included: TourofMissouri.com, wcsn.com, cyclingtv.com, kmov.com and velonews.com
- Viewers from 73 countries streamed coverage
- Approximately 21,000 unique visitors per hour during the live broadcast of the event
- Estimated total hits and impressions between all five websites is estimated at 487 million
- Average time on the website during live coverage was 17 minutes

Professional Reviews

“The Tour of Missouri far exceeded all of our expectations, especially for a first-year event. They clearly did a great job getting the word out as the crowds were large, enthusiastic and knowledgeable. Medalist Sports did its usual first-class execution of the event with challenging but safe courses and excellent logistics throughout. Everyone involved with the Tour of Missouri set a very high bar.”

-Sean Petty, COO, USA Cycling

“This is my 10th year in professional racing, so I’ve seen a lot of road races. This tour is a first edition, but it’s like a big tour in Europe like Paris-Nice and Tour of Switzerland. That is why I am so happy to win a big race like this one. It means a lot to me.”

-Luciano Pagliarini, Brazil, Prodir-Saunier Duval, Stage 4 winner

“The fans have been awesome. The team has really enjoyed the race. To have the third major race in the United States is special. It shows that cycling is growing in this country...for me, this was a special race being the last for Discovery Channel. It’s always great to win in the United States, especially with the type of enthusiasm we’ve seen at all levels surrounding this race.

-George Hincapie, USA Discovery Channel, Race Champion

“I have covered the Super Bowl, the NCAA Final Four and World Series, and I have to say this was better than any of those experiences. From start to finish, it was one of the best events I’ve ever seen. It far exceeded my expectations.”

-Kathleen Nelson, senior reporter, St. Louis Post-Dispatch

“The Tour of Missouri is a shining example of the kinds of exciting and forward-looking things that can be accomplished through private and public partnerships. The State of Missouri, the Division of Tourism and the Hawthorn Foundation demonstrated imagination and foresight in bringing the race to the state and acting as its primary sponsor in the inaugural year. Governor Matt Blunt and Lt. Governor Peter Kinder are to be congratulated for their leadership and support of the Tour of Missouri. And the race’s corporate sponsors showed a willingness to invest in launching an initiative that shows great promise.”

- Joe Sweeney, Editor & Publisher, Ingram’s, Kansas City’s Business Magazine

“On September 10th, 2007, the Tour of Missouri was an unknown factor. The Missouri field did not have the celebrity of the Tour of California, nor the terrain of Tour de Georgia, but it did have an enthusiastic state spirit. From the opening stage to the closing stage, people evidently loved the race. From the main roads to the country lanes, people cheered the riders, enthusiastically waving banners and flags. School bands played at sprint lines, showing their local spirit. Fans jostled along the barriers, craning their necks to the riders. And at the podium presentations, the crowds surged forward to the grandstand to see the winners. No one left early to beat the crowd; they stayed and cheered. So, as we left Missouri, we realized that the Tour of Missouri was no longer an unknown factor, but now part of the growing American Grand Tour landscape.”

- Neil Browne, Editorial Director, Road Magazine

**COMING SOON!
2008 TOUR OF MISSOURI
SEPTEMBER 8-14, 2008**