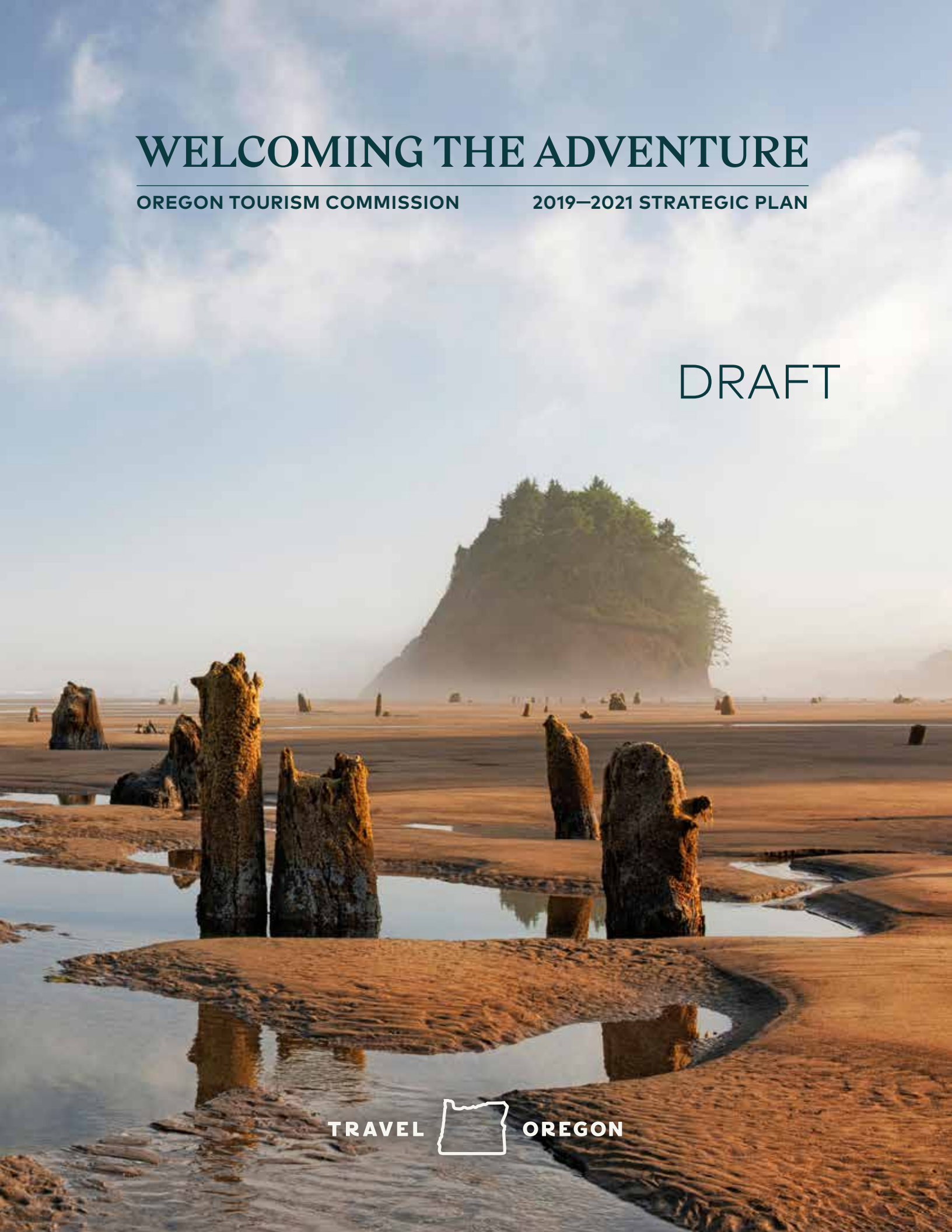


WELCOMING THE ADVENTURE

OREGON TOURISM COMMISSION

2019—2021 STRATEGIC PLAN

DRAFT



TRAVEL



OREGON

ABOUT TRAVEL OREGON

The Oregon Tourism Commission, dba Travel Oregon, is a semi-independent agency that works to enhance Oregon's economy by developing world-class visitor experiences and providing information that inspires travel and conveys the exceptional quality of Oregon as a destination. A nine-member board of commissioners appointed by the Governor oversees the agency. The commission aims to improve Oregonians' quality of life by strengthening the economic impacts of the state's \$11.8 billion tourism industry, which employs 112,200 Oregonians.



TABLE OF CONTENTS

- 2** VISION & MISSION
- 3** VALUES
- 4** STRATEGIC OVERVIEW
- 5** INTRODUCTION
- 6** STRATEGIC IMPERATIVES:
 - 7** Optimize Statewide Economic Impact
 - 13** Support and Empower Oregon's Tourism Industry
 - 17** Champion the Value of Tourism
 - 21** Run an Effective Business
- 24** CONCLUSION
- 25** ORGANIZATIONAL CHART
- 26** OREGON TOURISM COMMISSION
- 27** BUDGET



VISION

*A better life for all Oregonians through strong,
sustainable local economies.*

MISSION

*We inspire travel that drives economic development.
Through innovation and partnerships, we share the
stories of Oregon's people and places, deliver world-class
experiences, strengthen the industry and ensure the
preservation of Oregon's way of life and its natural places.*



VALUES

EVERGREEN

- *We strive to preserve Oregon's natural beauty with everything we do*
- *We build strength and resiliency for a sustainable future*
- *We balance work and life with our love for Oregon and the people in it*

TRAILBLAZE

- *We lead the way through innovation*
- *We lift each other up while driving forward*
- *We set the bar high and aren't afraid to fail*

TRUE NORTH

- *We take ownership of our work*
- *We honor our commitments*

CANOPY

- *We invite diverse perspectives and voices*
- *We show up for each other and our industry*



2019-2021 STRATEGIC OVERVIEW

IMPERATIVES

Optimize Statewide Economic Impact

Support and Empower Oregon's Tourism Industry

Champion the Value of Tourism

Run an Effective Business

INITIATIVES

- Align and optimize Travel Oregon sales, marketing, development and partnership programs and empower the industry to do the same
- Facilitate the development of world-class tourism product and experiences with a focus on gap areas
- Support high-use destinations to manage the impacts that stem from visitation
- Inspire overnight leisure travel from key markets

- Develop an organization-wide approach to offering development and training opportunities for the industry
- Support and enhance an industry-leading information network as the trusted source for all things Oregon
- Convene industry action networks to influence stakeholder action and increase collaboration
- Fulfill and respond to unforeseen opportunities and challenges as defined by Oregon's tourism industry

- Grow and align strategic partnerships and stakeholder base to leverage resources and build capacity
- Activate, engage and inspire new and existing advocates through compelling communication tools and messaging
- Improve industry and public feedback channel/process

- Deploy agency-wide IT training on agency expectations and utilization of shared technology platforms
- Prioritize professional development and wellness through a diverse, equitable and inclusive culture of learning and continuous improvement
- Continuously improve, communicate and ensure alignment on policies and procedures
- Establish cross-functional strategies in alignment with state and agency values to improve interdepartmental communication, workflows, productivity and outcomes
- Prioritize improvement of employee and industry engagement in identified areas of greatest need

KEY MEASURES

- Quantify variations in lodging demand, average length of stay and visitation volume to establish a baseline index of seasonal trends in overnight trip characteristics in year one and reduce seasonal variations across all regions in year two
- Increase Oregon's market share of total U.S. visitor spend (international and domestic)
- Monitor an index of destination management needs
- Grow strategic partner investment

- Increase stakeholder survey responses by 100 percent over the biennium and ensure statewide representation
- Develop an aggregate measurement system for tracking industry engagement, set baseline and determine future growth

- In year one, set baseline of earned media and circulation that mentions economic impact and number of jobs; increase in year two by 10 percent
- Local travel and tourism investments remain stable or grow
- Monitor regional implementation of tools designed to address needs identified in public perception survey of Oregon's tourism industry

- Meet or exceed executive branch performance expectations for reporting and accountability
- Maintain exemplary ratings and reputation as a high performing state agency
- 100 percent of employees are trained on and engaged in agency work on culture, equity and inclusion
- 100 percent of staff trained on use of agency-wide established technology platforms, values, policies and performance expectations
- Maintain or improve employee engagement and satisfaction scores



INTRODUCTION

For all the diverse beauty in Oregon, a unifying feature of the Oregon experience is the interplay of opposites: what is fresh and what is ancient, what is fragile and what is resolute, what raises questions and what offers answers. This interplay is continuous. It's everywhere. It transcends seasons. And it yields the happy condition of making every experience of Oregon legitimately new.

Oregonians will be the first to tell you they never stop discovering Oregon. And ironically, discovery usually involves slowing down, finding focus, giving your senses time to take in the richness of each moment, each place, each personality. Then the real magic starts. When we slow down, we realize that we are a part of the picture too—a diverse and complex community, we shift from observing to experiencing. And with this shift we discover more about this place and more about all people who live here and want to come here; we all become more connected, more welcoming and more intentional.

This 2019-2021 Strategic Plan stands as a connection to the highest ideals for driving economic development for all Oregonians by welcoming all visitors to experience what will always be a brand-new Oregon. This plan extends the four strategic imperatives from the previous strategic plan:

- **Optimize Statewide Economic Impact**
- **Support and Empower Oregon's Tourism Industry**
- **Champion the Value of Tourism**
- **Run an Effective Business**

The imperatives remain, but the actions guiding Travel Oregon for the biennium reflect new awareness, priorities, concerns and opportunities. The plan draws guidance from Oregonians, tourism industry stakeholders, visitors, the Oregon Tourism Commission and every employee at Travel Oregon.

According to the **2017**
 Tourism Advertising Evaluation and Image Study
 by Longwoods International,
every dollar
 Travel Oregon spends on advertising
 generates **\$157** in new visitor spending
 and **\$8** in state and local taxes.

At the core of the plan is the reinforcement of Travel Oregon’s strategic evolution as a Destination *Management* Organization, as opposed to a Destination *Marketing* Organization. And while it’s just one word, this progression reflects the maturity of Oregon’s globally recognized tourism industry. Interestingly, embracing “destination management” is possible because of our long-standing, resolute focus on responsive marketing, along with innovative sales, strategic partnerships and the robust development of new tourism products and experiences that we are able to market and share with the world. In a nutshell, destination management activities inspire travel to and within a destination, improve the visitor experience and enhance or protect destination assets. It’s a virtuous cycle of sustainable economic impact.

It’s with success that new and dynamic challenges arise, especially in a world where minute-to-minute changes shake up consumer trends, economies and climates. We at Travel Oregon are also caught in this interplay of opposites. On one hand, we are confident in the power and effectiveness of Oregon’s tourism industry. On the other hand, we know the industry needs more diverse and broader roots to ensure stability and resilience. We need to concentrate on developing and protecting the places that attract visitors while giving our partners the tools they need to inspire these visitors to choose their destination. We also recognize the power of marketing to educate our visitors on ways to visit more popular places in a sustainable way or travel to lesser-known areas, all to enhance the visitor experience and spread the economic impact that comes with visitation.

This plan highlights our shared awareness of the industry as stewards of the communities and environmental resources that make Oregon special. It’s a call for innovation, inclusion and outreach to rural and secluded destinations. It’s about supporting year-round experiences and ensuring the resilience and preservation of the places we love to love and sharing the stories of Oregon’s people and places. We bring our passion for bold long-term visions and solutions while remaining humble, nimble and focused on the priorities called out in this plan. We need to think big, stay focused and continue to build strong partnerships.

This plan embraces new and daring ways to empower Oregon’s tourism industry and address the need for longer, developmental, adaptive approaches to optimize the tourism industry for statewide economic impact now, and a hundred years from now. All while keeping the giddy exuberance that comes with exploring Oregon for the first or fiftieth time. It is with all this that we are welcoming the adventure ahead of us.

	2003	2017	Change
TAXES (STATE/LOCAL)	\$246 million	\$539 million	+119%
DIRECT EMPLOYMENT	84,500 jobs	112,200 jobs	+33%
EMPLOYEE EARNINGS	\$1.7 billion	\$3.3 billion	+94%
VISITOR SPENDING	\$6.5 billion	\$11.8 billion	+82%

OREGON TRAVEL IMPACTS, DEAN RUNYAN, 2017

OPTIMIZE STATEWIDE ECONOMIC IMPACT

Here's one for you: A politician, a geologist, a chef, a hotelier, a river guide, an artist, a winemaker, a wildlife biologist and a statistician all mash together into an elevator. They all get off on the same floor. They all go to the same room to talk about the same thing—Oregon's tourism industry.

Now, imagine you are also in that room with all these different professionals. Imagine the conversations about developing destinations, how to access international markets, track the effectiveness of a marketing campaign and the like. In these rich and often impassioned discussions, the cost/benefit analysis of tourism is front and center. Many people focus on the economic power of tourism to add living wage jobs and bring vitality to rural and remote communities. Others key in on the costs and challenges for developing tourism experiences. Money is certainly a part of the conversation, but in Oregon it's always about much more than money. The stakeholders that make up the tourism industry care deeply for their communities, the environment and Oregon cultures. We are on a mission to share—and protect—Oregon. We love all the wonders of Oregon, from culinary delights in Portland to backcountry hut touring in the Wallowas to kayaking on the Willamette River, and that means we need to protect them and share their stories with the world, so others will love and protect them too.

THE FIRST IMPERATIVE

Planning to optimize the tourism industry is a complex tradeoff between economic development and the preservation of places and ways of life that are an integral part of who we are as Travel Oregonians. We see the complexity and the promise inherent in the tourism industry. We see the importance of tapping into every bit of wisdom we can find. That's why our first strategic imperative is to optimize statewide economic impact. So, why did we choose to *optimize* rather than *maximize*? Well, it's simple in its definition and a little more complex in its implementation: Optimize is to act optimistically or as an optimist while maximize is to make as large as possible. At Travel Oregon, we aren't firm believers that bigger is better. We believe in doing things right, sometimes in small ways and sometimes big—like optimizing for community livability, for ecological vitality and creating as many jobs statewide as possible. That's why the primary initiative supporting the imperative is to:

*Align and optimize
Travel Oregon sales, marketing,
development and partnership
programs and empower the
industry to do the same*



During the North Coast Tourism Studio in Astoria, industry members work to align and enhance regional marketing.

HOUSE BILL 4146: GAME CHANGER

This effort to build greater alignment began in 2015 as Travel Oregon saw results showing that its tourism marketing efforts were working in a big way. Marketing success was creating both the opportunity and the need for significant statewide and regional development work. While Travel Oregon has been working with local communities to develop new tourism products and experiences since its inception, the Regional Cooperative Marketing Program was constrained by statute to focus exclusively on marketing tactics. House Bill 4146 shifted the way our regional partners could utilize the funds in the Regional Cooperative Marketing Program, evolving it into the Regional Cooperative Tourism Program (RCTP), allowing funds to be used on development and sales in addition to traditional marketing.

House Bill 4146 also increased the statewide lodging tax from 1 percent to 1.8 percent—dramatically increasing the resources flowing to Oregon's seven tourism regions by moving the program to a required 20 percent of Travel Oregon's budget resulting in an increase from \$1 million to more than \$7 million annually. The bill also empowered Travel Oregon to further extend the reach of their dollars with the requirement that 10 percent of the overall budget annually go to strategic investments through a competitive grant program.

“Hopefully, this grant program will continue as it provides an opportunity to develop projects that support the local economy. Continuing to ensure the criteria offer the flexibility to allow ground-up solutions to come forward is an important attribute of the program.”

Association of Oregon Counties



Butte Creek Mill before restoration.



Travel Oregon grants are investing in tourism-related projects such as rebuilding and restoring the Butte Creek Mill so that it's fully operational, maintains its historic integrity and includes ADA accessibility and an interpretive center highlighting local history and Native American culture.

This new format has already invigorated the industry. The RCTP drives accountability, efficiency and coordination among many industry programs and investments. New and comprehensive audit and assessment protocols ensure that resources align with Travel Oregon's priorities and strategic goals. And candidly, this legislation set the stage for the next phase of robust growth in Oregon's tourism industry. However, it's worth noting that Travel Oregon and the regions will face budget reductions in 2020 when the state lodging tax is reduced from 1.8 percent to 1.5 percent.

MORE FOCUS AND MORE IMPACT

Leading up to this plan, we felt we needed more information to focus more keenly to ultimately have more impact. That's why in 2018 Travel Oregon invested in an array of studies, research, listening sessions and visitor profiles. To name a few, there was the Wildfire Impact Study, Oregonians Perception of the Tourism Industry Study, the Oregon Tourism Industry Engagement Study, the Oregon Visitor Report, the Advertising Accountability Study and 10 Oregon Tourism Listening Sessions that took place between April and May 2018 in each of the tourism regions. Any and all Oregonians who are impacted by the tourism industry,

including business owners, land managers, volunteers, nonprofits, policymakers and more were invited to participate.

It's through our own experiences as tourism professionals and Oregonians, the hundreds of pages of feedback from the industry and from the plentiful research and data we undertook that we know while there is plenty of Oregon to go around, it may not always feel that way during peak months at some popular locations. The challenges posed by seasonality and capacity constraints in certain areas are evident. This is why we feel it is necessary to:

Facilitate the development of world-class tourism product and experiences with a focus on gap areas

Support high-use destinations to manage the impacts that stem from visitation

This is a big deal. Travel Oregon is one of the only state tourism agencies to move beyond the strict purview of marketing and direct resources toward the development of tourism product and destination management. Destination management and the development of tourism product really go hand in hand. We see destination management as activities inspiring travel to and within a destination, improving the visitor experience and enhancing or protecting the destination assets. Tourism product is anything that contributes to or enhances the visitor experience; it could be a signature experience attracting a traveler to the area for the first time.



EXAMPLE: EXPANDING CAMPING SEASON

From crabbing on a chilly coast day and warming up in a cozy yurt in winter to enjoying those pleasant fall days eating breakfast at a picnic table, travelers are taking advantage of extended camping season opportunities. "The camping season is stretching itself," state parks spokesman Chris Havel said. "The peak time is getting longer and longer."

By focusing development on “gap areas,” which could be anywhere there is a deficit of experiences available to visitors— whether that be in a specific location or within a specific experience-type, Travel Oregon can effectively uplift new areas and diffuse impact from areas experiencing high visitation. Providing new experiences will help inspire travelers to get off the beaten path and explore during shoulder seasons. By concentrating on these gap areas, we can continue to optimize the statewide economics from tourism while also helping to mitigate the impacts on highly visited Oregon attractions.

Examples of Travel Oregon working with our partners investing in the enhancement of Oregon visitor experiences includes developing long-distance mountain biking and fat biking tour routes, regional food trails featuring farm and foodie experiences, Electric Vehicle (EV) Byways and historic road trip itineraries to name a few. The development and resulting marketing of these new experiences is inspiring visitors to travel to lesser-known destinations throughout the state. Ready, Set, GOrge! is an innovative communications strategy where Travel Oregon is working closely with partners in the Columbia River Gorge to address management challenges.

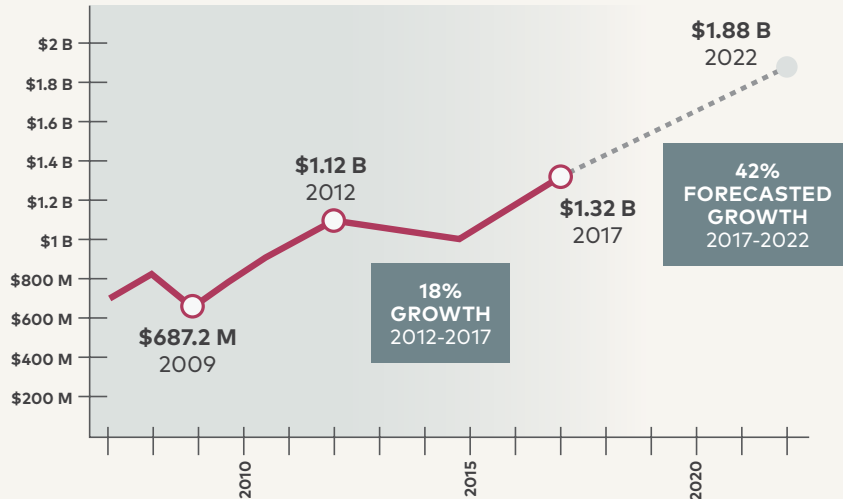
As you can see, developing experiences is not new to us. What’s different in this plan are the actions aimed at developing experiences that focus on gap areas and actively managing and mitigating unintended impacts that can occur when too many people visit a destination at the same time. These actions are essential for Oregon’s long-term tourism promise. We must preserve Oregon as an outdoor recreation destination and ensure the conservation of natural areas and rural communities. Our efforts need to attract visitors to stay longer and explore more widely. And we need to encourage them to come back again, perhaps at a different time of year.

Engineering this kind of harmony isn’t easy. The marketing payoffs might not result in the same return on growth as we’ve seen in the recent years as well. But it’s not our intent to *grow* statewide visitor volume. We’ve always been deliberate in our key imperative to *optimize* statewide economic impact. And if that means focusing traditional marketing on gap areas and lesser-traveled destinations, then by all means we’ll do it, because what’s best for Oregon is best for all of us. We also know that this work requires the attention and support of a strong industry and hundreds of people in different professions, each contributing to create those moments of wonder that feel custom made for diverse visitors. We are committed to sharing and preserving these experiences today, and for our great, great, great (add as many greats as you want) grandchildren.



Travel Oregon partnered with the Oregon Cultural Trust to bring the whimsical Only Slightly Exaggerated campaign to seven communities across Oregon via hand-painted murals. The murals were painted by Oregon-based non-profit Forest for the Trees and brought the campaign’s captivating artwork to life along the new Oregon Mural Trail. The trail was developed to inspire Oregonians and visiting explorers to get outside and experience the natural wonders of each destination, generate a sense of community pride, enhance economic impacts and contribute to local arts and culture initiatives.

TOTAL INTERNATIONAL SPENDING IN OREGON



The VLM Path



Emotional:

Dream > Anticipate > Commit > Enjoy > Brag > Crave



PHOTO: KRIBY LEE

Travel Oregon remains committed to continuing to:

*Inspire overnight leisure travel
from key markets*

We'll continue to optimize statewide economic impact by delivering innovative, effective marketing and sales programs. We'll leverage the momentum of improved industry alignment and participation—focusing on gap areas and shoulder seasons; developing new visitor opportunities; managing and protecting popular locations; and attracting international visitors who tend to stay longer, spend more and often travel off the beaten path.

To support these efforts, Travel Oregon will continue to invest in the Visitor Lifecycle Management (VLM) platform, as it also supports many of the other initiatives outlined in this plan. The VLM enhances our ability to identify where consumers are in their decision-making process as they plan their next vacation. The VLM guides consumers through their process as they progress from trip inspiration to visitation. The VLM allows us to provide more responsive and personalized content to not only inspire visitors to travel to and within Oregon, but also to help shift consumer behavior—dispersing visitors to lesser-known attractions and encouraging shoulder season travel.

Travel Oregon will also leverage the exposure of Oregon21, the 2021 IAAF World Championships, to elevate the positioning of Oregon as a world-class travel destination. The IAAF World Championships is the crown jewel of track and field sports—a 10-day spectacle of awe-inspiring performances from the best athletes in the world. Oregon21 will be the largest sporting event held in the world in 2021, and the largest our state has ever welcomed. Oregon will be the first state in the U.S. to host this event.

The global attention Oregon will receive over the next two years, culminating with the Oregon21 taking place August 6 through 15, 2021, is an unparalleled opportunity for the state. During the 2015 IAAF World Championships in Beijing, approximately 63 hours of competition were broadcast to 194 countries over the course of nine days. By comparison, in that same year, the Super Bowl was broadcast to 180 countries for three-and-a-half hours.

THE PREAMBLE TO KEY MEASURES

First, to be clear, all the core performance measures that are at the heart of Travel Oregon’s ongoing mission will continue to be monitored, analyzed and reported. The key measures discussed in this document are aimed specifically at the four strategic imperatives in the plan:

- **Optimize Statewide Economic Impact**
- **Support and Empower Oregon’s Tourism Industry**
- **Champion the Value of Tourism**
- **Run an Effective Business**

The answer to the question, “How are you going to optimize statewide economic impact?” is answered through the strategic initiatives. The answer to the question “How will you know if those initiatives are working?” is discussed in the key measures.

Measurement is in the DNA of Travel Oregon. The continued shift from “Marketing” to “Management” as a focus for Travel Oregon means that we must develop an appetite for “qualitative,” “real-time,” and “ethnographic data.” In marketing, math and statistics are the coin of the realm. And they are important in management too...but numbers are not enough. A simple way to say it is that Travel Oregon is committed to making an art of listening to real people, in real time, talking about real stuff and making real time decisions.

We can’t expect to manage with an exclusively empirical approach (not that we have ever had an exclusively empirical approach but our marketing focus enabled our data-nerd tendencies). As you read about these performance indicators you may notice that a measure may need to change year over year, or that a measure really isn’t a measure or that the plan for analysis may depend on what we discover. It will be like going to the grocery store without a list and deciding what to cook based on what we find there, what is fresh and what fits the demand for that particular meal. With that, let’s look at the key measures for the first imperative.

KEY MEASURES: OPTIMIZE STATEWIDE ECONOMIC IMPACT

The first key to this measure is the word “optimize.” While we certainly want to increase and grow economic impact, we recognize that “growth” alone is not the answer, and, when done without foresight and planning it can be a problem. Plus, there is more to Oregon than summer-time. We need to join with industry partners to develop and elevate experiences that draw visitors in the shoulder seasons. And the beautiful thing about Oregon is that we have year-round coolness happening all over the state. So, when we say optimize, we are saying we will work to bring visitors to Oregon year-round and throughout every day of the week. The second key word is “statewide.” We are also saying we

want to see greater distribution of visitors across the diverse geographies of Oregon. That’s why we will:

Quantify variations in lodging demand, average length of stay and visitation volume to establish a baseline index of seasonal trends in overnight trip characteristics in year one and reduce seasonal variations across all regions in year two

Lodging demand by region is a measure we are already using and is now being elevated on Travel Oregon’s list of strategic priorities. The focus on this measure will help us understand what works and what doesn’t—both in general, and in specific regions and specific seasons. To the degree that we can take actions that correlate with increases in lodging demand in shoulder seasons we will succeed in supporting our partners when they need the most lift.

We know that the value of this measure is in our ability to dial in and refine the relationship between a shoulder season activity and a segment of people who will plan overnight stays to do those things—and come back year after year. It will be the relationship between the product, the season and growth of the demand—as trended data. The key here is in the trends we will see over time.

THE U.S. AND THE WORLD

We also want to understand our effectiveness as a statewide industry for attracting domestic and international visitation by looking at the relative success of Oregon compared to the rest of the U.S. Therefore, we will:

Increase Oregon’s market share of total U.S. visitor spend (international and domestic)



PHOTO: PORT OF PORTLAND

We want Oregon to be an increasingly popular destination for visitors, and if it comes down to a visitor wondering whether to come to Oregon or another destination—we want more people to choose Oregon.

If you didn't read the preamble to the measurement section on page 11, and you're a proud data-nerd, you may have trouble with the next two measures, because they are not "measures" at all. The preamble reminds us that the art of management resists exclusively empirical analysis for success. In a fast changing, social media driven, instant gratification consumer world, nimbleness and resilience are key. So, we believe we need to develop the organizational acumen to watch, listen, learn, probe, survey and discuss. Our goal is to build an index that can operationalize the destination management needs across Oregon's unique geographies. Recognizing the wide variety in each of Oregon's seven tourism regions, we know we will need to be aware and responsive. So, we will:

Monitor an index of destination management needs

Monitoring destination management needs is an important foundational step that will enable more pragmatic study (and innovation) as we progress. If you are a proud-data-junky you will recognize this as a stage of building frameworks, taxonomies and models to understand the



year-round dynamics (and eventually quantifiable data) in any given region in Oregon. So, Travel Oregon is working on the following:

- Zooming in on shoulder seasons and more experiences for visitors
- Managing tourism growth in order to preserve local assets (natural and cultural)
- Working with key partners to help alleviate congestion during peak tourism season in areas of high visitation
- Increasing visitation in shoulder seasons
- Creating positive interaction between travelers and residents
- Informing community leaders and policymakers (local, county, state, tribal) on the value of tourism and its viability as a long-term career
- Fostering partnerships that will help address the current demand on outdoor/natural resources and identifying plans to mitigate its impact
- Influencing an ethos of conservation and sustainability in ongoing development, marketing and partnerships
- Increasing the adoption of sustainable business practices in the tourism businesses

And to support this, we will analyze our current geographic markets and our current target audience demographics and psychographics to align with these criteria.

Our final measure focuses on a critical link in our strategic goals: Oregon tourism's industry partners. One message that was consistent in all the conversations that facilitated the development of this plan is we must work together to take the industry to the next level. This means that Travel Oregon can't simply "go and do" the plan. We will find ways to invite, engage, support and respond to partners who have skin in the game. We think we can only win if we are able to encourage more partners to invest more in Oregon. So, we will:

Grow strategic partner investment

The actual number associated with this growth will be used as a baseline for key strategies in securing more investment. It will be a kind of bellwether measure for the confidence of the industry, the cycles of innovations that are unfolding and the demand that the markets are experiencing. For Oregon to win, we need all our strategic partners at the table. And when we win, we all win together. For instance, in 2019, Travel Oregon partnered with Oregon Film and LAIKA to raise money for wildfire recovery efforts on the Northern Umpqua Trail Project and the Lower Deschutes River Post-Fire Restoration Project, all while promoting the power of tourism and film to inspire economic development in every corner of the state. Travel Oregon will continue to help our strategic partners benefit from their increasing investments and efforts in Oregon tourism.

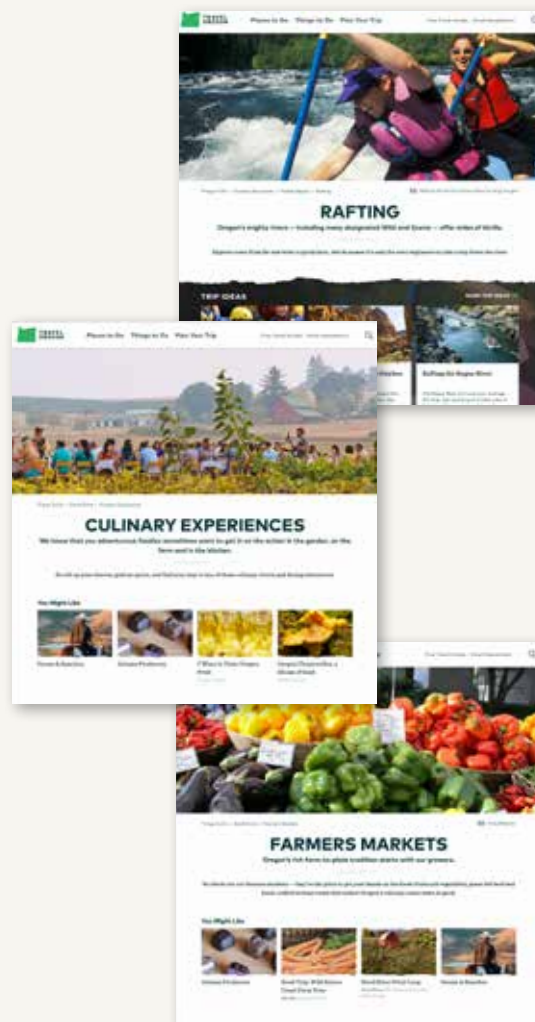


SUPPORT AND EMPOWER OREGON'S TOURISM INDUSTRY

Travel Oregon's earliest efforts centered on developing marketing acumen that gave life to the Travel Oregon brand. This Oregon brand thrives using leading-edge data management strategies and innovative social media and digital platforms. We have a secret: a handful of tourism directors from other states have confessed to using Oregon's messaging, creative and social media tactics as an indicator for the next innovative trends in the national tourism industry. But our real secret is that at the end of the day what makes us successful is good storytelling. We tell the stories of our winemakers, our food growers, our river guides and our natural wonders with the world. We share our stories through our marketing campaigns and encourage our destination partners to leverage this work increasing Oregon's share of voices, and we believe it's working.

We knew then, and we know now, however, that marketing is only a part of the formula for success. We need to offer resources and guidance to the industry itself. So, our second strategic imperative demands we continue to support and empower Oregon's tourism industry. Oregon's tourism industry is under continuous construction and adaptation. One constant in this dynamic development process is the rising need for more in-market expertise—in-product development as mentioned above—but also in the development of customer service skills, hospitality, event planning and logistics.

It's about getting the basics right, and it's about honoring the critical role of the people who are creating amazing experiences for Oregon's visitors. It's about the right attitude, knowledge and ability to solve problems. Even great situations can be made lousy if the folks serving visitors don't have the information, training or preparation necessary to meet their needs. Oregon's success as a world-class destination depends on developing the skills and passion in people that truly make experiences feel customized and fresh.





Southern Oregon Coast Tourism Studio in Coos Bay.



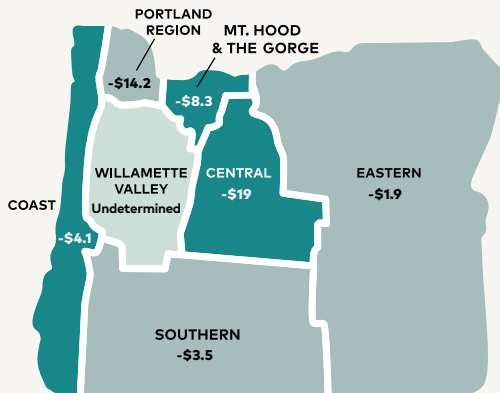
North Coast Tourism Studio in Tillamook.

No doubt this is a big industry with big challenges, and resources are always limited. That's why we need focus. Travel Oregon is in a unique position to be able to identify specific areas where focused education and consultation will make the most difference—improving the bottom line while delivering amazing visitor experiences. A key initiative for supporting and empowering Oregon's tourism industry is to:

Develop an organization-wide approach to offering development and training opportunities for the industry

This means we will continue to host the Oregon Governor's Conference on Tourism; Oregon Tourism Studios and offer trainings for agritourism businesses, tour operators, guides and outfitters; grant writing classes; international sales workshops and Travel Oregon 101s. We will also be taking a detailed inventory of all of our programming to ensure it's at the top of its game, consistent and effective in its communications and broadened to support the needs of the evolving industry through offerings such as the Global Sales Summit, Global Market Updates and a Rural Tourism Conference.

This also means we'll be assessing Oregon's tourism workforce overall—diving deeper to understand the needs and opportunities across the state. We will expand partnerships and leverage programs with others working to train and educate Oregon's tourism workforce, such as Oregon Restaurant and Lodging Association's Guest Service Gold program; Chemeketa Community College's student winemaker program; and OSU Cascades' Tourism, Recreation and Adventure Leadership Program. We see this as more than filling a need in the industry; we see it as the way to prepare future generations to become innovative leaders, ensuring a healthy Oregon tourism economy.



Spending lost related to 2017 wildfire by tourism region (millions)

In response to the communities and businesses impacted by the 2017 Oregon wildfires, and to better understand the economic consequences of these fires on the state's travel and tourism industry, Travel Oregon worked with Dean Runyan Associates and Destination Analysts to conduct a study in March 2018.

THE COIN OF THE REALM

For industry professionals leading tours, bed and breakfasts providing accommodations, transportation companies, restaurants and the like, information is the coin of the realm. Over the past few years there have been several times when Travel Oregon activated an industry-wide information network to help facilitate surges in visitors—like the solar eclipse in 2017—or unanticipated challenges like responding to regional wildfires. Moments like these proved that Travel Oregon has the information, the networks and the trust of the industry and visitors to offer timely, relevant and accurate information. Travel Oregon is a trusted



Oregon Welcome Centers are a key component of the information network—serving as the real-time, in-person conduit of travel information and inspiration to over 200,000 visitors annually—allowing us to capture key consumer data, enhancing social channels and aligning with our marketing both internally and externally. Growing the network to better serve visitors and the industry, Travel Oregon is opening its eighth Welcome Center located at the Siskiyou Rest Area off I-5 Northbound in May of 2019.

source for research, economic impact data, Oregon events—literally providing tweets, images, videos, blogs, and social media posts that not only inspire and inform millions of visitors but the industry itself, too. So, with that, we are taking more actions to:

Support and enhance an industry-leading information network as the trusted source for all things Oregon

And we'll be ready to act quickly when the situation demands leadership and support to:

Fulfill and respond to unforeseen opportunities and challenges as defined by Oregon's tourism industry

Two heads are always better than one, right? So, wouldn't seven heads be better, or even 200? At Travel Oregon we know we don't have all the answers or all the bandwidth to have the full breadth of reach and impact we'd like to. But we do have the resources and expertise to bring vast industry representatives together, to enlist their connections and influences. By supporting a myriad of diverse industry groups—from the Oregon Outdoor

Recreation Initiative to the Oregon South Coast Regional Tourism Network (OSCRTN), and more—working to grow and foster strong relationships, we know more information sharing will take place, more great ideas will form, and more action will lead to more accomplishments. So that's why in this plan we will:

Convene industry action networks to influence stakeholder action and increase collaboration

KEY MEASURES: SUPPORT AND EMPOWER OREGON'S TOURISM INDUSTRY

It makes sense that mature industries benefit from their ability to operationalize and measure novel and complex business cycles. Travel Oregon's research helps us understand what momentum and success look like—quantified for the entire industry. This means going beyond the methodologies that are the tried and true foundation of marketing research. It means doing things that have never been done before. Our first "measure" is also not a measure, per se. It focuses on developing a methodology to identify measures that spotlight the characteristics that yield great results (as well as the ones that miss the mark).



Develop an aggregate measurement system for tracking industry engagement, set baselines and determine future growth

What exactly constitutes “engagement?” How can we tell if we are improving or slipping? What are the appropriate sources and frequency for the raw data we will use to feed our tracking system? These are not easy questions and we fully expect whatever methodology we create will be sharpened and made more reliable year over year—in perpetuity. We never want to stop learning. In this effort we want to capture the foundational elements for a viable industry tracking system. Down the road we see that system getting more and more refined, relevant and reliable.

Travel Oregon is also committed to continuing our persistent outreach to our industry partners. This feedback is critical as it constitutes a kind of headwater for many of the priorities that Travel Oregon focuses on year over year. A primary source of this feedback is our stakeholder survey, which will help us capture more of the breadth and depth of the industry’s reach from a wider variety of industry partners. So, we will:

Increase stakeholder survey responses by 100 percent over the biennium and ensure statewide representation

Finally, we recognize that the tourism industry is already in need of more workforce. As the industry grows, the need for more knowledgeable and experienced employees also grows. The lack of available trained workforce could become a serious constraint for the industry. Workforce education is critical, and we recognize that other entities, universities, community colleges, professional training programs and the like, are better equipped to build and deliver compelling and effective professional development programs.

We commit to be present with our partners who are already doing the “big lift” of developing the career paths that are going to be critical to the long-term potential of the industry.



PHOTO: RUSS ROCA

CHAMPION THE VALUE OF TOURISM

Just looking through the list of workshops and keynotes at the Oregon Governor’s Conference on Tourism makes it very clear that the tourism industry is expansive and complex. There is a lot to know, a lot that needs to be done and there is a palpable excitement of potential and opportunity.

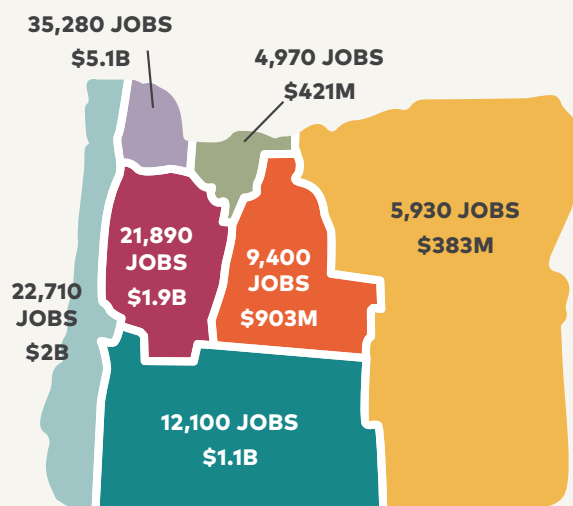
But the story of tourism does not resonate with everyone. And opinions vary on how tourism impacts communities. In fact, there are some folks for whom the very idea of tourism is still a head-scratcher. Even when the financial impacts and the job-creating power of tourism are explained (it’s an \$11.8 billion industry that directly employs more than 112,000 Oregonians), the idea of people traveling and paying money to stay here seems farfetched. People are quick to rattle off a list of other priorities they believe should come first. The point is not to debate priorities, it is to realize that successful tourism efforts can work in tandem with all kinds of other economic development strategies.

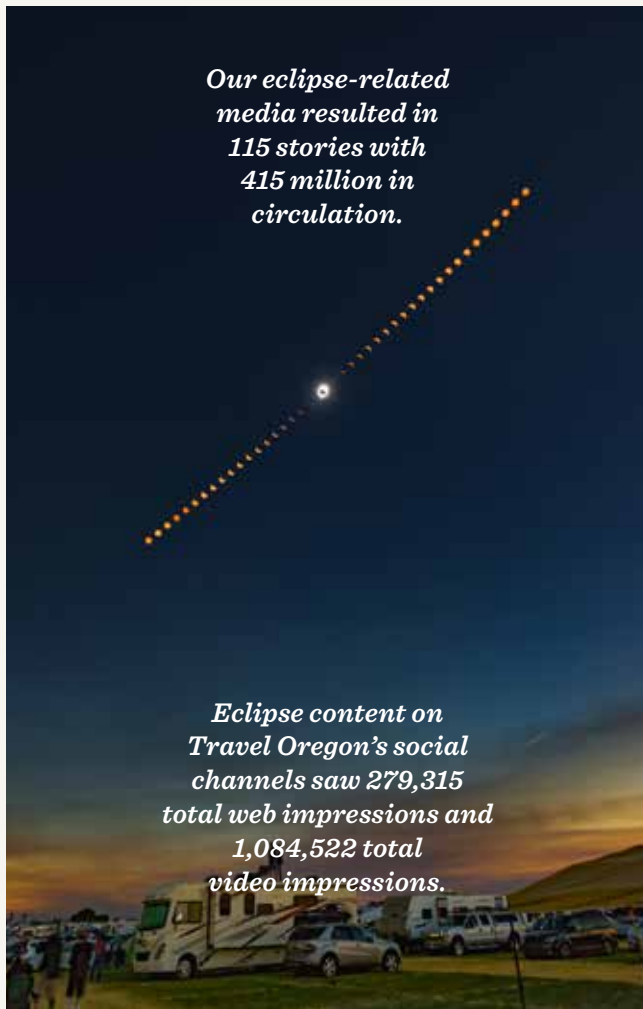
It’s also important to call out that communities and organizations that have an interest in developing their economic advantage with tourism have a partner in Travel Oregon. This is the heart of our third strategic imperative: Champion the value of tourism.

It means telling the stories of communities like Polk County and the Southern Oregon Coast that have developed compelling experiences for visitors and are seeing vibrant economic development, job creation and more activity in shoulder seasons. It means listening to communities and understanding the magic of Oregon in each location. It means bringing deep experience and statewide resources to help jump-start economic growth—even in the most rural and remote communities in Oregon. It also means inviting everyone to the table to ensure all voices are heard.

Travel Oregon will continue its efforts to bring together a diverse set of partners to achieve shared goals that none could achieve alone. Efforts like the Oregon Outdoor Recreation Network where more than 30 partners from every corner of the state came together to promote sustainable outdoor recreation. Why? Because Oregon’s bountiful natural resources are cornerstone to our legacy, our identity and our economy. As an industry, outdoor recreation has the potential to significantly impact the well-being of Oregon’s communities, its residents and its natural resources. Developing a shared vision with a common agenda for how we focus our efforts to improve the outdoor recreation economy will ensure that our impacts are positive and inclusive of all.

EMPLOYMENT & REVENUE DUE TO TOURISM





Our eclipse-related media resulted in 115 stories with 415 million in circulation.

Eclipse content on Travel Oregon's social channels saw 279,315 total web impressions and 1,084,522 total video impressions.



"I'm learning that tourism touches almost all corners of our society, and there is a remarkable team of professionals with diverse backgrounds working to shape the world my children will inherit. Yes, tourism is a world builder - especially as the industry continues to shift from destination marketing to destination management."

Joshua Heineman

Director of Tourism Marketing at the City of Seaside
Visitors Bureau

Key Messaging Developed and Aligned with Partners:

- Keep Oregon moving: Arrive early, stay put, leave late
- Keep yourself healthy: Stay cool, stay hydrated, stay informed
- Keep yourself safe: No campfires, no fireworks, carry a first aid kit
- Keep Oregon safe: See something, say something

We also saw great success in robust collaboration during the Total Solar Eclipse. While many locals were worried about a large influx of people to Oregon, we saw this as an opportunity to educate and inspire visitors. We asked ourselves how we could encourage visitors to come early and stay late while also enhancing their

experiences so they would go home and tell their friends about their great vacation in Oregon. With the possibility of traffic jams and wildfires, we wanted to prepare them, not scare them, while also preserving this beautiful place we call home. We ensured preservation of Oregon's scenic splendor by educating guests about how to participate in thoughtful recreation and travel so they would leave Oregon as they found it. We also engaged health care providers, food vendors, gas station operators, truckers, Oregon residents and businesses in the path of totality, along with local, national and international media. And we never would have been able to see such success if we had taken the path (of totality) on our own. That's why our initiatives ask us to:

Grow and align strategic partnerships and stakeholder base to leverage resources and build capacity

Activate, engage and inspire new and existing advocates through compelling communication tools and messaging

Increasing the number of people and businesses who see themselves as being a part of the tourism industry is paramount in building stronger advocates. For many, tourism is a full-time and exciting profession. For others, tourism is just a part of their professional focus. And many others may not yet appreciate their connections and interdependence with tourism, but we aim to help them see the networks and become involved in the community.

Building the industry depends on fostering dialogue among industry partners and ensuring there are clear connections between words and action. We want people to raise their hand to join the conversation. We want to invite people formally and informally to join the

dialogue and the community. We want diverse representation. We want to hear stories of success and accomplishment, and we want to hear about mistakes, problems or unrealized potential. With this aim to:

Improve industry and public feedback channel/process

Looking ahead, we want to see clarity and alignment in what is possible for Oregon’s tourism industry. As much as possible, we want this to be a shared story where tourism is seen as a well-managed resource for local economic development and job creation. We want the industry to be responsive and held in high regard as stewards of the lands and lifestyles of Oregon. And we want to quantify and measure what is working and what’s not working—and then share that data widely throughout our network.

KEY MEASURES: CHAMPION THE VALUE OF TOURISM

We are aware of the buzz words that run through these initiatives. Words like “engage” and “partnerships” carry a lot of meaning, which is why we use them. We also know buzz words can muddle intentions, understanding or outcomes instead of adding clarity. We know what we mean by these terms, but will “engagement” and “partnerships” help drive the industry to deliver economic impact and more jobs?

We believe the answer is yes, and to prove it we are going to monitor earned media stories about economic impact and jobs even more closely. We are already using this measure, but now we are going to up our game:

In year one, set baseline of earned media and circulation that mentions economic impact and number of jobs; increase in year two by 10 percent

The recent public perception survey highlighted successes, as well as some “caution lights” for the tourism industry. Travel Oregon sees this data as optics to understand the unintended consequences of visitation in specific areas, and as a foothold to develop innovative alternatives and solutions. Understanding and reacting to challenges is essential to develop trust that the process works when can all work together.



Travel Oregon has a strategic partnership with Oregon Film to support Travel Oregon marketing objectives and create an ongoing opportunity to support local filmmakers/content creators who are producing innovative content about Oregon that inspires travel to or around the state.



Travel Oregon works to champion the value of tourism—garnering coverage highlighting Oregon as a destination and showcasing the power of tourism to enhance communities.

We recognize that if we want to positively influence Oregon residents' overall attitudes about tourism, then our efforts should focus on:

- Improving or increasing opportunities for positive social interaction between locals and visitors
- Increasing awareness about the positive economic impacts of tourism
- Educating residents that their community may have the capacity to accommodate more visitors

And so this is why we will:

Monitor regional implementation of tools designed to address needs identified in public perception survey of Oregon's tourism industry

Because we will be monitoring perceptions of the value that people ascribe to tourism investments, we want the people making and administering these investments to see, experience and appreciate the positive effect they are making. And therefore, we imagine they will want to protect or even increase those investments. We hope to see:

Local travel and tourism investments remain stable or grow

This measure “completes the circuit” from a perspective of broad-based, statewide, strategic, industry investments to regional, local, product development and innovation. We also recognize that the stability of these investments is critical for the long-term viability of the industry. This industry benefits heavily from sustained efforts that build momentum, and it will certainly suffer with modest interruptions to focus and resources.



RUN AN EFFECTIVE BUSINESS

There is an old maxim that says in a battle between strategy and culture, culture always wins. The implication is clear, we can identify strategic imperatives and initiatives all day long, but if that strategy is out of alignment with our culture, we will not be successful. For this very reason, Travel Oregon engaged all of its employees in recognizing and defining our shared values (see page 3).

A key component of our culture centers on the attention and integrity we bring to running our business. We are proud of our innovative reputation, and we are proud of our ability to stretch financial resources and find ways to improve or resolve tough situations. Making smart business choices is a core part of our culture. That’s why we continue to support the strategic imperative that Travel Oregon will run an effective business.

A cultural value that has given great lift to Travel Oregon is our discipline around research and data. Early on we understood the value of building quality repositories of information, images and contacts. We also made sure we understood the best way to leverage the incredible—and volatile—world of a fragmented digital landscape. We continue to think strategically about ensuring that we use computers to do what computers do best and allow people to do what people do best. So, we will:

Deploy agency-wide IT training on agency expectations and utilization of shared technology platforms

If you sit in on a meeting inside of Travel Oregon, you are likely to hear a lot of laughter, a lot of debate and a strong bias toward action and accomplishment. We love the energy that comes from very different and complementary points of view. As the organization continues to evolve, so will our focus on better understanding our dependence on one another. Improving workplace focus on equity and inclusion is a foundational belief that will make us stronger and better. Honoring the diversity that makes us individually unique is to be celebrated. We are committed to inviting all people into our community and meeting them where they are. We will hold one another to high standards for accountability and will be intentional in our pursuit of honoring each person’s experience, journey and individuality. That’s why we will:

Prioritize professional development and wellness through a diverse, equitable and inclusive culture of learning and continuous improvement

To be a high performing organization, Travel Oregon must cultivate an inclusive work culture and create an environment that reflects the diversity of Oregon. This involves leveraging the diversity of our workforce and empowering all our employees to be fully engaged and to contribute to the agency’s mission. In our work around the state, we value and commit to proactively seek genuine participation from under-represented and underserved groups and recognize them as an essential component of creating a welcoming and rich cultural environment for visitors and Oregonians alike.

We all share the responsibility to promote and embed the principles of equity, diversity and inclusion throughout Oregon’s tourism industry. We ask every employee to embody Travel Oregon’s core values so we can provide the best possible service to our state. Diversity and inclusion cultivate innovation and results, leading to a stronger, more sustainable tourism industry in Oregon. This is why we will:

Continuously improve, communicate and ensure alignment on policies and procedures

The overall effectiveness of the organization also demands alignment between and among departments. We recognize the catalytic power of working interdependently; it reduces waste, cycle time and expense—and it adds impact, cohesion and resilience. We may all have different jobs, but we need to be aligned with and share the same strategic priorities. Our focus is sharpened and results improved when we ground our work with our best aspirations and identity. We know there is more potential here, that is why we will:

Establish cross-functional strategies in alignment with state and agency values to improve interdepartmental communication, workflows, productivity and outcomes

And just as we are taking care to listen and guide our work from listening to how Oregonians perceive and feel about tourism, we will:

Prioritize improvement of employee and industry engagement in identified areas of greatest need

When you get the chance to visit with Travel Oregon employees you will not have to look far to see that we are driven and passionate about our work. It is not an overstatement to say that for many of us it is a calling, a sacred mission. That's why it is not a stretch when we say we are "...working to deliver programs to ensure that the resources entrusted to us as a semi-independent state agency are invested effectively and transparently to benefit all Oregonians." Others see Travel Oregon as a stable and reliable platform, giving support and direction to the entire tourism industry—while also listening carefully to the needs and concerns of stakeholders and Oregonians. Which is why we work continually to connect with people around the world and share the many stories of Oregon.

- It's about those precious moments when you unzip your tent and take in the vista of an alpine lake right there in front of you.
- It's about talking with a winemaker or a river guide who loves the simple pleasure of sharing what they know. And it is about respecting the awesome and primordial power of the landscape, the mountains and the coast.

And if you are reading this, you are in this picture too. You are already making a difference. We'd love to hear what you think about this amazing place, and how you feel when you see the Alvord Desert, Newberry Volcanic National Monument or Haystack Rock (or any number of natural wonders in Oregon) again like it's the first time through the eyes of a new visitor.



Newberry Volcanic National Monument

KEY MEASURES: RUN AN EFFECTIVE BUSINESS

Call it what you want, fiduciary responsibility, integrity, good-housekeeping—Travel Oregon will continue to honor the trust of the industry by maintaining exemplary business standards. We will ensure the “highest and best” use of funds and professional focus in every program we oversee. And that’s why we will:

Meet or exceed executive branch performance expectations for reporting and accountability

Maintain exemplary ratings and reputation as a high performing state agency

Travel Oregon’s workplace culture is a big part of what makes us effective in fulfilling our mission. It is a tangible super-power and source of joy for employees. And as we grow, we are very conscious of the potential threats to our hard-crafted culture of excellence, integrity and community. We don’t want growth to erode the potential for our employees to be deeply engaged or satisfied with their career choice.

We measure employee engagement and satisfaction every year. And as we grow and change, that survey is even more important. With this, we will:

Maintain or improve employee engagement and satisfaction scores

There is no doubt that year over year, the results of the employee engagement and satisfaction surveys are big news inside of Travel Oregon. We notice where we are strong—but we are most interested in those areas where we can improve.

One way we are improving employee engagement and satisfaction is by implementing a recognition program that will celebrate the talent and success that Travel Oregon employees bring to work every day, bringing our values to life.

In this plan we are doubling down on the employees’ experience of social equity, diversity and inclusion. We see these complex issues as being foundational to our culture. We seek to be exemplary in this area with best-practices and thought-leadership. But the most important measure comes from the day-to-day experience of our employees; their feelings of support, safety and inclusion. We are already acting on these areas and we expect this focus to continue to be a hallmark of our professional culture. Which is why we will make sure that:

100 percent of employees are trained on and engaged in agency work on culture, equity and inclusion

We see our growth as an opportunity to “walk the talk” about equity, diversity and inclusion. But growth can also cause fragmentation, silo development and a loss of process efficiency. While we are all for innovation, we are also all for identifying standards for efficiency and consistency. Our technology infrastructure is one of the ways we can either create confusion and diffusion of resources—or we can create coherence, effectiveness and alignment. To do this, we will ensure:

100 percent of staff trained on use of agency-wide established technology platforms, values, policies and performance expectations

CONCLUSION

This plan is the result of hundreds of conversations all over the state, intensive research and data projections. It focuses on building a vibrant, sustainable tourism industry that delivers economic benefits statewide—in every season. The plan addresses the new challenges of a growing and complex industry. And this plan works to deliver great visitor experiences in more places throughout the state.

What isn't stated directly in this plan is the awareness that Travel Oregon must be in a state of constant learning. Visitors are changing what they want, need and expect. The industry changes in the face of macro and micro-economic trends. And Oregon itself is changing from season to season—and even those seasons are changing

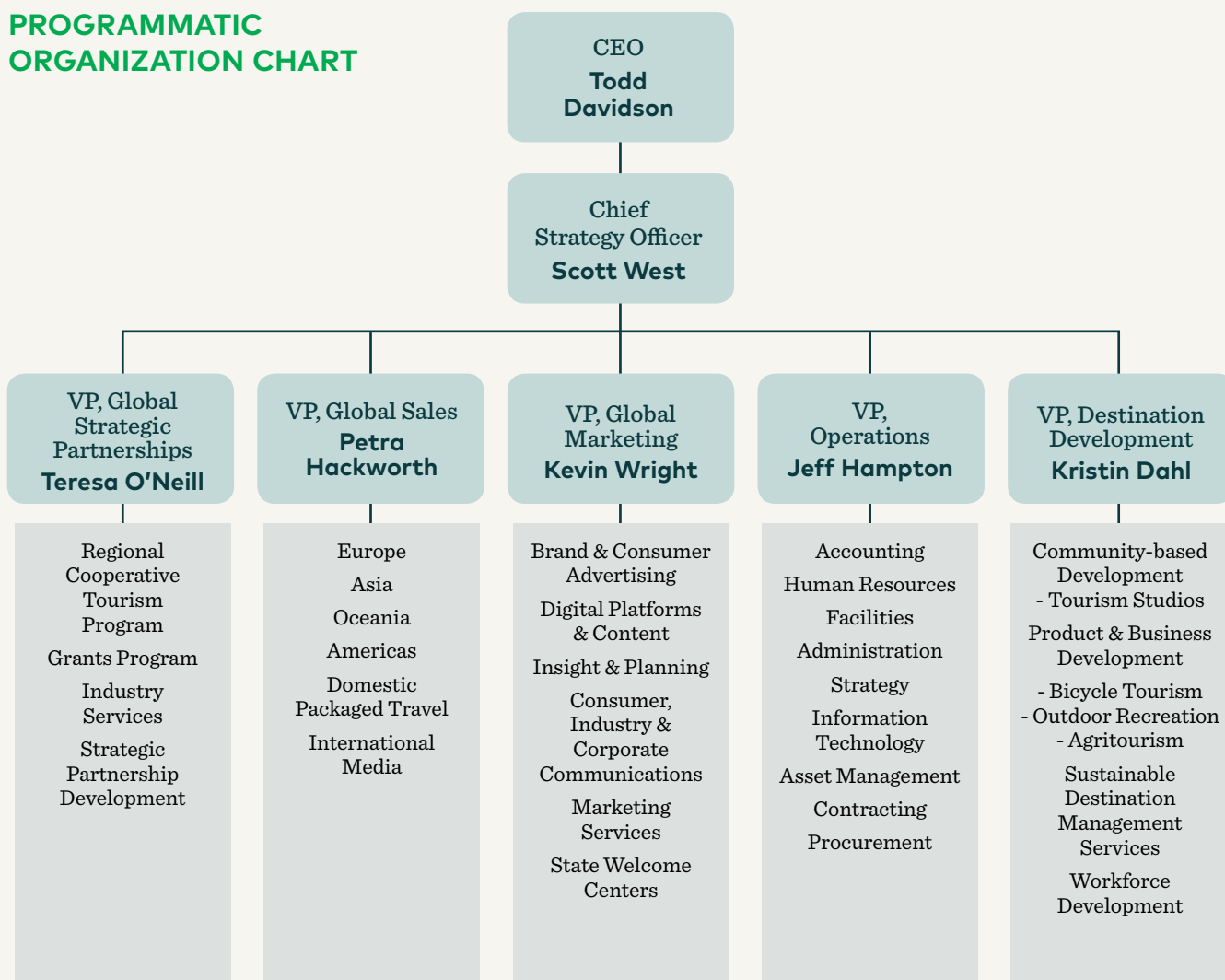
with unpredictable weather patterns. Continuous learning allows us to develop an industry that is relevant and resilient. It's a discipline that attracts people with deep curiosity, vision and passion for all things Oregon, and we like it that way.

Continuous learning also demands humility. We know we can't know it all. We know that change is inexorable, and we will find ourselves surprised by things we didn't see coming. But we're okay with that as well. Dynamic change is part of the industry and part of Oregon. It's what makes every adventure feel new and fulfilling.

We welcome the adventure, and we welcome you to join us.



PROGRAMMATIC ORGANIZATION CHART



OREGON TOURISM COMMISSION



Governor
Kate Brown

Nine Governor appointed members oversee the Oregon Tourism Commission. Three Commissioners represent the tourism industry-at-large, five represent the lodging sector and one represents the public-at-large. Commissioners approve and oversee the commission budget and the strategic plan that directs the actions of the professional staff.



CEO, Travel Oregon
Todd Davidson

OREGON TOURISM COMMISSION MEMBERS THROUGH JUNE 30, 2019



Chair
Ryan Snyder



Vice Chair
Scott Youngblood



Kara Wilson Anglin



Don Anway



Richard Boyles



Nigel Francisco



Al Munguia



Maria Ponzi



Kenji Sugahara

OREGON TOURISM COMMISSION MEMBERS AS OF JULY 1, 2019



Don Anway



Richard Boyles



Lucinda DiNovo



Nigel Francisco



Maria Ponzi



Mia Sheppard



Kenji Sugahara



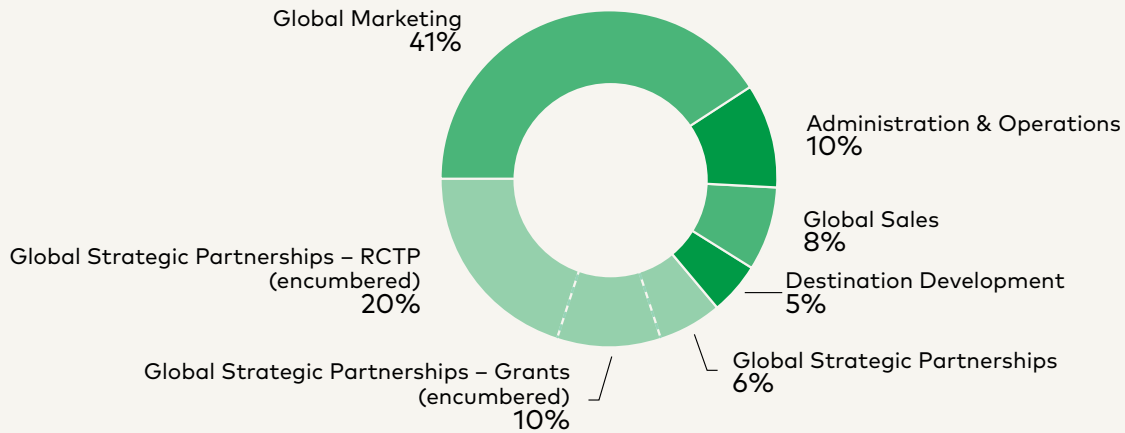
Greg Willitts



Scott Youngblood

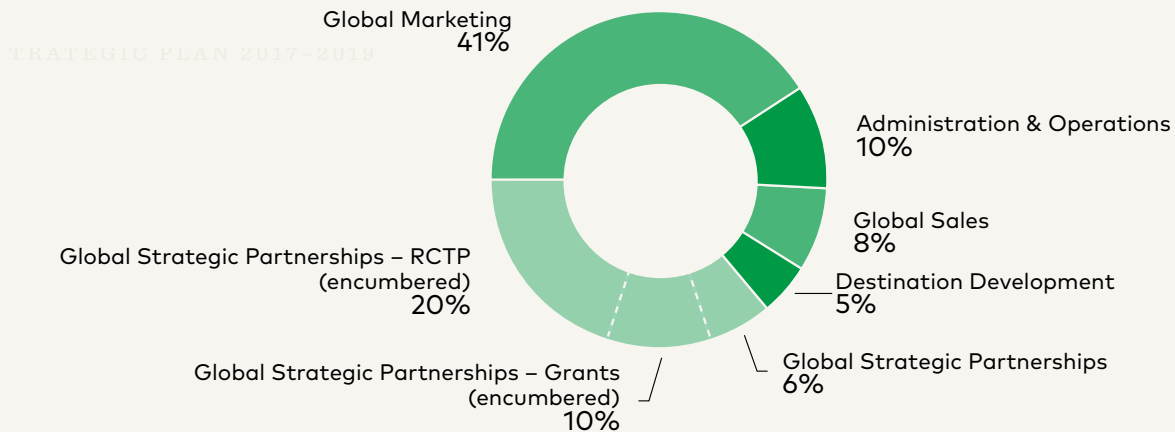
**2017-19
BIENNIAL
BUDGET**

State Lodging Tax Revenue	\$75,340,000
Other Sources	\$400,000
TOTAL	\$75,740,000
Global Marketing	\$31,250,000
Global Strategic Partnerships	\$4,199,000
Global Strategic Partnerships – Grants (encumbered)	\$7,534,000
Global Strategic Partnerships – RCTP (encumbered)	\$15,069,000
Global Sales	\$6,406,000
Destination Development	\$3,392,000
Administration & Operations	\$7,890,000
TOTAL	\$75,740,000



**2019-21
BIENNIAL
BUDGET
(DRAFT)**

State Lodging Tax Revenue	\$76,700,000
Other Sources	\$400,000
TOTAL	\$77,100,000
Global Marketing	\$31,965,000
Global Strategic Partnerships	\$4,261,000
Global Strategic Partnerships – Grants (encumbered)	\$7,670,000
Global Strategic Partnerships – RCTP (encumbered)	\$15,340,000
Global Sales	\$6,422,000
Destination Development	\$3,510,000
Administration & Operations	\$7,932,000
TOTAL	\$77,100,000





TRAVEL  OREGON

OREGON TOURISM COMMISSION
530 Center Street NE, Suite 200
Salem, Oregon 97301
971-717-6205
TravelOregon.com
Industry.TravelOregon.com