

TRAVEL



OREGON

**JOINT COMMITTEE ON
WAYS AND MEANS**

**Subcommittee on
General Government**

4.25.19

TRAVEL OREGON

ORGANIZATIONAL STRUCTURE



GOVERNOR KATE BROWN

OREGON TOURISM COMMISSION



Chair
Ryan Snyder



Vice Chair
Scott Youngblood



Kara
Wilson Anglin



Don
Anway



Richard
Boyles



Nigel
Francisco



Al
Munguia



Maria
Ponzi



Kenji
Sugahara



TRAVEL OREGON

Todd Davidson, Chief Executive Officer

VISION

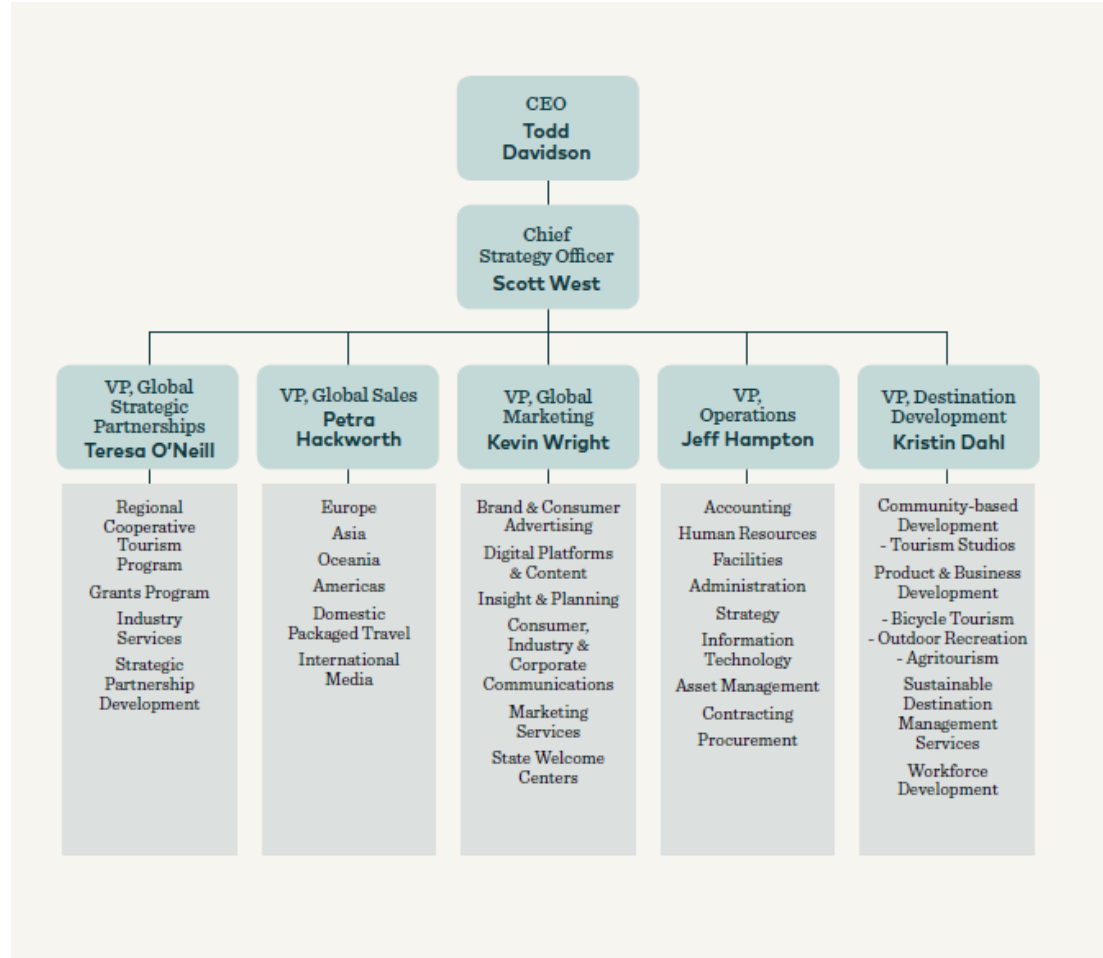
*A better life for all Oregonians through strong,
sustainable local economies.*

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.*



TRAVEL OREGON ORGANIZATIONAL STRUCTURE



OREGON'S TRAVEL & TOURISM INDUSTRY OVERVIEW



OREGON'S TOURISM INVESTMENT

OREGON'S 2003 TOURISM BUDGET

- 47th lowest of the 50 states
- Losing tourism market share to other states
- Oregon needed an economic stimulus

OREGON'S TOURISM STRATEGY

- House Bill 2267 was enacted – the Oregon Tourism Investment Proposal



LEGISLATIVE HISTORY

2003 LEGISLATION (HB 2267)

- Implemented 1% Statewide Lodging Tax to fund Oregon Tourism Commission, dba Travel Oregon
- Established Travel Oregon as a semi-independent state agency
- Protected local lodging taxes
 - Existing local rates and allocations for tourism were "grandfathered"
 - Future increases in local lodging tax rates require at least 70% dedicated to tourism

2016 LEGISLATION (HB 4146)

- Increased state lodging tax from 1% to 1.8% effective July 1, 2016 & decreases to 1.5% effective July 1, 2020
- Directs 20% of state lodging tax to implement the Regional Cooperative Tourism Program & 10% to the Competitive Grants Program

Enrolled

House Bill 4146

Sponsored by Representatives NATHANSON, MCKEOWN; Senators BEYER, EDWARDS, ROBLAN (Pre-session filed.)

CHAPTER

AN ACT

Relating to the state transient lodging tax; creating new provisions; amending ORS 284.131 and 320.305; prescribing an effective date; and providing for revenue raising that requires approval by a three-fifths majority.

Whereas Enrolled House Bill 2267 (chapter 818, Oregon Laws 2003), the original statewide transient lodging tax bill, established a stable and permanent tourism funding source for the State of Oregon; and

Whereas the protection and stability of tourism revenues resulting from the passage of House Bill 2267 has contributed to increases of 18 percent in direct tourism employment, 58 percent in visitor spending and 74 percent in transient lodging tax revenues since 2003; and

Whereas the protection and stability of tourism promotion revenues help develop stronger working relationships among destination marketing organizations and enhance the effects of the collective marketing and sales efforts for the State of Oregon; and

Whereas the protection and stability of these tourism promotion revenues can help attract more domestic and international visitors to Oregon with large-scale events throughout the state, make Oregonians more competitive in the global tourism marketplace and create jobs for Oregonians; and

Whereas it is the intention of the Seventy-eighth Legislative Assembly to enhance past legislative action with the following statutory changes; now, therefore,

Be It Enacted by the People of the State of Oregon:

SECTION 1. ORS 320.305 is amended to read:

320.305. (1)(a) A tax of [one] 1.8 percent is imposed on any consideration rendered for the sale, service or furnishing of transient lodging.

(b)(A) The tax must be computed on the total retail price, including all charges other than taxes, paid by a person for occupancy of the transient lodging.

(B) The total retail price paid by a person for occupancy of transient lodging that is part of a travel package may be determined by reasonable and verifiable standards from books and records kept in the ordinary course of the transient lodging tax collector's business.

(c) The tax shall be collected by the transient lodging tax collector that receives the consideration rendered for occupancy of the transient lodging.

(d) The tax imposed by this subsection is in addition to and not in lieu of any local transient lodging tax.

(2) The transient lodging tax collector may withhold a collection reimbursement charge of five percent of the amount collected under subsection (1) of this section.

AGENCY ACCOUNTABILITY & REPORTING



OREGON TOURISM COMMISSION/ dba TRAVEL OREGON STATUTORY REPORTING

Annually -

Comprehensive Annual Financial Report

(Dept. of Administrative Services)

Oregon Tourism Commission Annual Report

(Legislative Fiscal Office)

Rules Report

(Oregon Legislature)

Biennial -

Secretary of State Audit Review

Travel Oregon Strategic Plan & Budget

(Governor, Legislature, Business Oregon,
Industry partners, Legislative Fiscal Office)

As required and requested -

Budget Modifications

(Legislative Fiscal Office)

Legislative Updates



Photo: Carolyn Wells-Kramer
Sokol Blosser Winery

TRAVEL OREGON RESEARCH DASHBOARD

TRAVEL IMPACTS SUMMARY: 2018

Spending
\$12.3B (4.2% ▲)

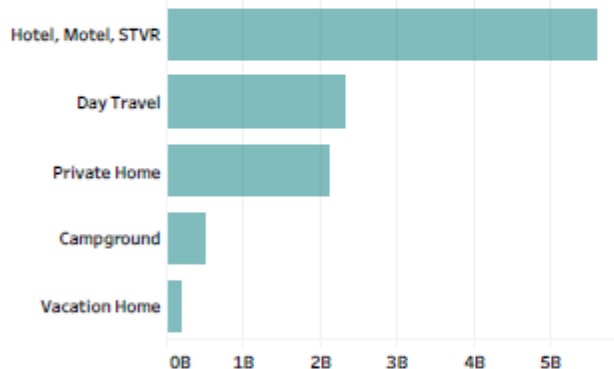
Employment
115.4K (2.9% ▲)

Earnings
\$3.6B (8.9% ▲)

Tax Receipts
\$1.3B (5.8% ▲)

Visitor Spending By Type of Accommodation

Visitor Spending By Type of Accommodation: 2018



Accommodation Type	Value	% of Total	YOY Chg (%)
Hotel, Motel, STVR	\$5575.6M	52.4%	3.8% ▲
Day Travel	\$2290.4M	21.5%	3.7% ▲
Private Home	\$2101.9M	19.8%	4.4% ▲
Campground	\$478.4M	4.5%	4.2% ▲
Vacation Home	\$189.3M	1.8%	2.2% ▲

SOURCE: DEAN RUNYAN ASSOCIATES (DRA)

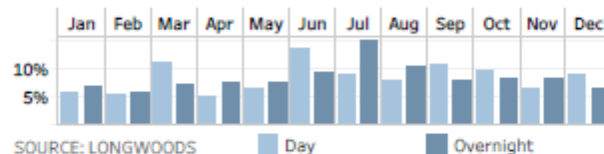
VISITOR VOLUME & AVERAGE SPENDING: 2018

Person Trips (2018)
29.1M (1.1% ▲)

Per Person Trip (2018)
\$287 (2.7% ▲)

SOURCE: DEAN RUNYAN ASSOCIATES (DRA)

DOMESTIC TRIPS SEASONALITY: 2017



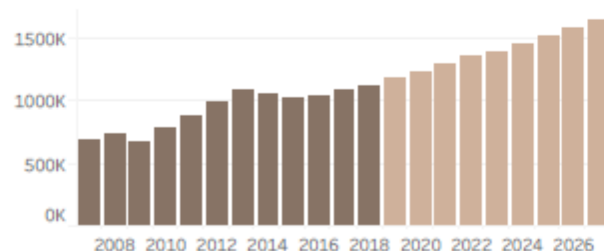
INTERNATIONAL VISITATION

Volume (2018)
1.1M (2.8% ▲)

Spending (2018)
\$1.4B (8.5% ▲)

- Trend
- Top Countries
- Spending
- Volume
- Estimated Years
- Projected Years

International Volume: Trend



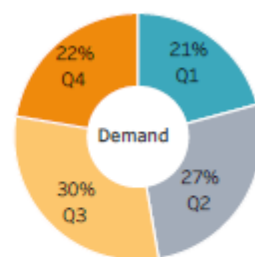
SOURCE: TOURISM ECONOMICS

LODGING TRENDS: 2018

Demand
15.9M (1.4% ▲)

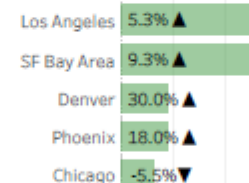
Revenue
\$1.96B (2.3% ▲)

Occupancy
64.8% (-0.9% ▼)

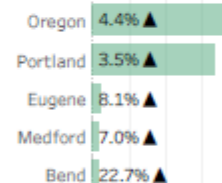


DOMESTIC VISITOR AIR ARRIVALS: 2017

Top 5 Origin Markets



OR Airports



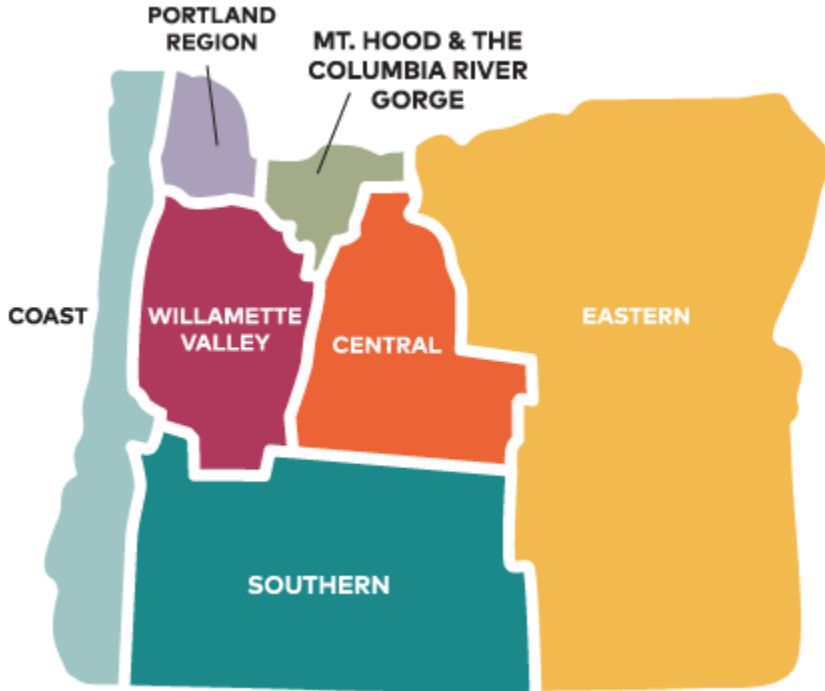
SOURCES: U.S. Department of Transportation (Origin & Destination Survey, T100), Dean Runyan Associates

ADVERTISING RESULTS

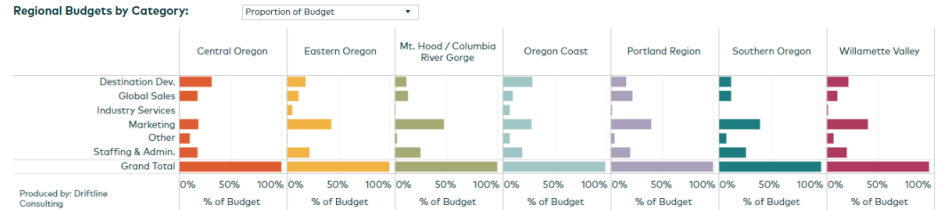
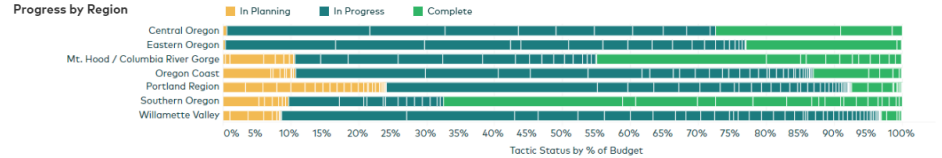
Every \$1 invested in the Oregon ad campaign in 2017 generated almost **\$157** in visitor spending and about **\$8** in state and local tax revenue.

SOURCE: LONGWOODS

OREGON'S REGIONAL COOPERATIVE TOURISM PROGRAM



RCTP Overall Plan Summary



LEGISLATIVE ACTION

HB 4146 INVESTMENT MANDATE

2017/2019 Biennial Budget

	1.80%	1.00%	Delta
Transient Lodging Tax	75,340,000	41,856,000	33,484,000
Less: Statutorily mandated:			
RCTP (20%)	15,069,000	-	15,069,000
Grants (10%)	7,534,000	-	7,534,000
Subtotal	22,603,000	-	22,603,000
Net Transient Lodging Tax for Programming	52,737,000	41,856,000	10,881,000
Less: Marketing & Sales Fund	4,450,000	-	4,450,000
Remainder for Core Programs	48,287,000	41,856,000	6,431,000
			9%
	for Core Programs (At least 65% must be used to fund state tourism programs)	for RCTP, Grants and Core Programs (At least 80% percent must be used to fund state tourism marketing programs)	

WHO IS OREGON'S TOURISM INDUSTRY?

OVER 115,400 OREGONIANS DIRECTLY EMPLOYED*

DIRECT

- Destination Marketing Organizations & Chambers of Commerce
- Dining, wineries, breweries, distilleries
- Lodging properties, casinos & spas
- Attractions, gardens, farms
- Transportation
- Events
- Recreation

- Retail
- Media & publishers
- Industry suppliers
- Government (state & federal)

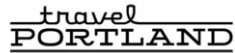
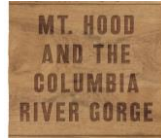
INDIRECT

- Manufacturing
- Construction
- Agriculture
- Professional services



RDMO

REGIONAL DESTINATION
MANAGEMENT ORGANIZATION



DMO

DESTINATION MANAGEMENT ORGANIZATION



STATEWIDE COMMUNICATIONS

STATEWIDE
Travel Oregon



REGIONAL
RDMO



LOCAL
DMO

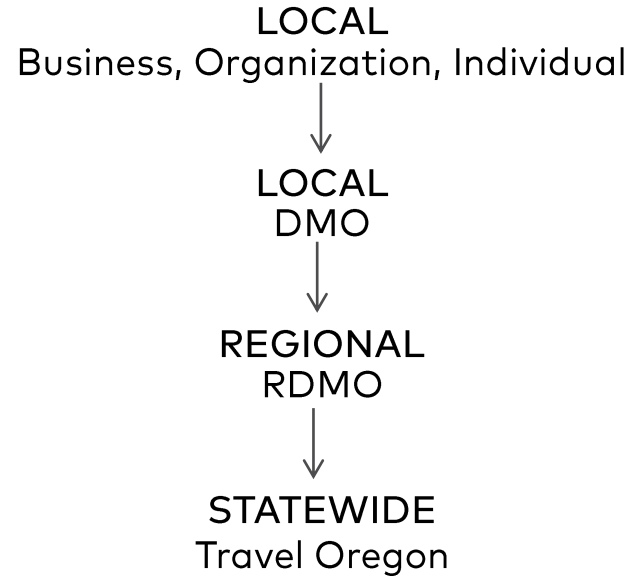


LOCAL
Business, Organization, Individual





TOURISM INDUSTRY PARTNERING



TRAVEL OREGON

DEPARTMENTS & PROGRAMS

Global Strategic Partnerships

- Regional Cooperative Tourism Program
- Competitive Grant Program
- Industry Services
- Partnership Development

Global Marketing

- Consumer marketing
- Integrated and digital
- Branding and creative
- Research and analytics
- Communications
- State Welcome Centers

Global Sales

- Domestic/International travel trade
- International media
- Target markets: Americas, Asia, Europe and Oceania

Destination Development

- Oregon Tourism Studios
- Product/Community/Business development
- Travel Oregon Forever

Operations

- Accounting
- Human Resources
- Contracting / Procurement



GLOBAL STRATEGIC PARTNERSHIPS

GLOBAL STRATEGIC PARTNERSHIPS

REGIONAL COOPERATIVE TOURISM PROGRAM (RCTP)

- \$15.34 million projected allocation to the program in 2019-21 biennium
- Redeveloped operating guidelines; new Menu of Investments
- Created \$1.5 million additional in regional grants and strategic investments

INDUSTRY SERVICES

- Oregon Governor's Conference on Tourism
- Meetings and Events
- Travel Oregon 101s

COMPETITIVE GRANTS

- 10% of Travel Oregon budget encumbered to funding program
- Two small grant cycles and one medium grant cycle planned for 2019-21 biennium
- \$2.5 million projected available for small and medium grants in 2019-21 biennium

STRATEGIC PARTNERSHIPS

- 5 key partners
- Public/private partnerships
- Oregon21

REGIONAL COOPERATIVE TOURISM PROGRAM STRATEGY

REGIONAL COOPERATIVE TOURISM PROGRAM PLANNING TIMELINE

Statewide Survey

At the onset of each two-year planning cycle, Travel Oregon will conduct a statewide survey of tourism stakeholders asking for input regarding regional plans and regional tourism priorities, opportunities and constraints, and their general insights on how regional investments could be maximized within their region and individual communities.

Draft Plan

RDMO drafts plan based on input derived from stakeholder survey.

Final Plan

RDMOs will craft final two year plans and corresponding budgets.

Presentation to Stakeholders

Regional Destination Management Organizations will present approved plans back to regional stakeholders via an in-person presentation.

Survey Reports

The survey results and corresponding regional reports (7) will be distributed to Regional Destination Management Organizations to aid their planning efforts.

Regional Stakeholders Gatherings

The regional stakeholder gatherings will be structured as an opportunity for core tourism stakeholders within the region to interface with the Regional Destination Management Organization directly and give their insights on regional strategies. Regional Destination Management Organizations will present regional survey results and a draft of their regional strategy to assess with regional stakeholders.

Travel Oregon Review

Regional Destination Management Organizations will submit two-year plans to Travel Oregon staff for approval.

REGIONAL COOPERATIVE TOURISM PROGRAM

REGIONAL ALLOCATIONS

Region	2017-19	2019-2021 (projected)	Total 2017-2021
Portland	\$4,851,769	\$6,074,800	\$10,926,569
Coast	\$2,540,845	\$3,276,200	\$5,817,045
WV	\$1,477,583	\$1,815,800	\$3,293,383
Central	\$1,218,340	\$1,552,600	\$2,770,940
Southern	\$1,014,278	\$1,289,000	\$2,303,278
Hood/Gorge	\$600,000	\$600,000	\$1,200,000
Eastern	\$600,000	\$600,000	\$1,200,000
Total	\$12,302,815	\$15,208,400	\$27,511,215

GRANTS PROGRAMS

Travel Oregon has established a program to make grant awards “to eligible applicants for projects that contribute to the development and improvement of communities throughout the state by means of the enhancement, expansion and promotion of the visitor industry.”

Travel Oregon Competitive Grants

SMALL GRANTS

Up to \$20,000

10% cash
match required

*\$750,000 awarded
(2017-2019)*

MEDIUM GRANTS

\$20,000 - \$100,000

25% cash
match required

*\$853,000 awarded
(2018-2020)*

LARGE GRANTS

Greater than \$100,000

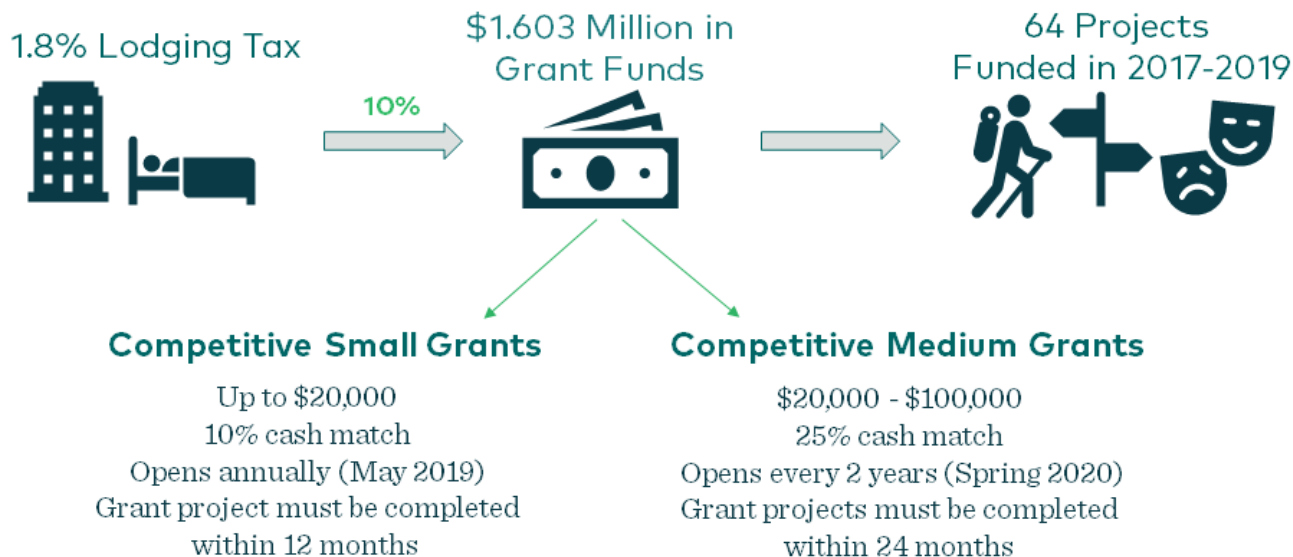
50% cash
match required

*\$10 million awarded
(2017-2020)*

COMPETITIVE GRANTS

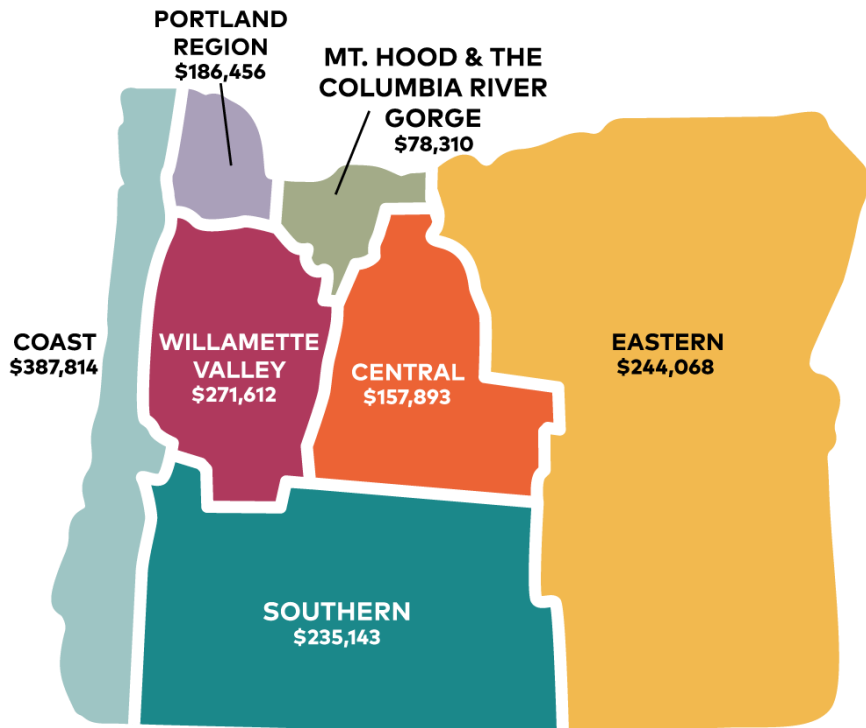
2017-19 SMALL & MEDIUM GRANTS

Travel Oregon awards projects that contribute to the development and improvement of communities across the state by means of the enhancement, expansion and/or promotion of the tourism industry.



REGIONAL SNAPSHOT

2017-19 SMALL & MEDIUM GRANTS



\$1.6M

CENTRAL OREGON
\$157,893

EASTERN OREGON
\$244,068

MT. HOOD & THE GORGE
\$78,310

OREGON COAST
\$387,814

GREATER PORTLAND
\$186,456

SOUTHERN OREGON
\$235,143

WILLAMETTE VALLEY
\$271,612

\$9,000 SUNSET EMPIRE PARK & RECREATION DISTRICT to purchase and install three weatherproof lockers specifically designed to store a beach wheelchair.

CITY OF INDEPENDENCE to construct and install pedestrian wayfinding signage throughout the historic downtown and along the Willamette River Trail. **\$20,000**

\$100,000 LIBERTY THEATRE FOUNDATION INC. to complete construction and restoration of La Grande's Liberty Theatre. Upon completion, the theatre will open for public use, providing a cultural resource for the region.

BUTTE CREEK MILL FOUNDATION to rebuild and restore 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. **\$80,000**

CITY OF CASCADE LOCKS to construct a "hub" to serve as a community operated rest stop for hikers, cyclists, recreationalists and community members. The Hub will include amenities such as information kiosks, water fountains, restrooms and showers, bicycle parking and repair stations, picnic areas and lockers and storage facilities. **\$20,000**

CITY OF ST. HELENS to install new signage and improve existing signage, as a result of an existing branding and wayfinding master plan. These signs will entice visitors to pull off of Highway 30 and St. Helens/ Columbia Boulevard and into the historic downtown district. **\$75,000**

\$9,000 OREGON ADAPTIVE SPORTS for an inclusive marketing project to further extend the reach to visitors with disabilities.

COMPETITIVE GRANTS

2017-18 SMALL GRANT PROJECTS

Name of Organization	Grant Amount
Applegate Trails Association	\$19,370
Association of Oregon Counties (AOC)	\$20,000
Butte Creek Mill Foundation	\$20,000
Cascade Pacific RC&D	\$13,000
Chehalem Valley Chamber of Commerce	\$20,000
Discover Your Northwest (dba Discover Your Forest)	\$16,000
Douglas County Parks Department	\$20,000
Dunes City	\$1,775
Eastern Oregon Visitors Association	\$7,500
Educate Ya	\$20,000
Friends of the Columbia Gorge	\$19,500
Friends of the Rogerson Clematis Collection	\$11,980
Go Wild: American Adventures LLC	\$3,295
Hanthorn Cannery Foundation	\$600
Joseph Center for Arts and Culture	20,000

Name of Organization	Grant Amount
Maupin Area Chamber of Commerce	\$6,250
Mid-Columbia Economic Development District	\$10,000
Oregon Coast Visitors Association	\$20,000
Oregon Environmental Council	\$17,000
Oregon International Port of Coos Bay	\$12,750
Oregon State Parks Foundation	\$12,500
Portland Playhouse	\$15,000
Restore Oregon	\$15,000
Salem Brewery Association	\$12,135
Trailkeepers of Oregon	\$20,000
Trans-Cascadia Backcountry Mountain Bike Guiding and Outfitters, LLC	\$5,000
Travel Medford	\$5,000
Umatilla Chamber of Commerce	\$16,000
Visit McMinnville	\$20,000
TOTAL	\$399,656

COMPETITIVE GRANTS

2018-19 SMALL GRANT PROJECTS

Name of Organization	Grant Amount
Baker County Tourism - Basecamp Baker	\$13,150
Baker County Tourism - Basecamp Baker	\$10,780
Cape Blanco Heritage Society	\$13,500
City of Canby	\$13,500
City of Cascade Locks	\$20,000
City of Independence	\$20,000
Columbia River Maritime Museum	\$12,000
Cottage Theatre	\$20,000
Eastern Oregon Regional Theatre Inc	\$20,000
Eugene Civic Alliance	\$20,000
Friends of Sumpter Valley Dredge	\$20,000
Klamath Trails Alliance	\$20,000

Name of Organization	Grant Amount
Lake County Chamber of Commerce	\$8,630
Marshfield High School	\$2,880
Neighborhood Economic Development Corporation	\$20,000
Oregon Adaptive Sports	\$9,000
Oregon Electric Railway Historical Society	\$7,000
Oregon Electric Railway Historical Society	\$20,000
Port of St. Helens	\$20,000
Sunset Empire Park & Recreation District	\$9,000
TORTA	\$20,000
Umatilla County Historical Society	\$10,000
Wallowa Mountains Hells Canyon Trails Association	\$19,200

TOTAL

\$348,640

COMPETITIVE GRANTS

2018-20 MEDIUM GRANT PROJECTS

Name of Organization	Grant Amount
Association of Oregon Counties	\$100,000
Butte Creek Mill Foundation	\$60,000
Salem's Riverfront Carousel	\$30,000
Coos County	\$100,000
Friends of the Oregon Caves and Chateau	\$100,000
Lane Council of Governments	\$88,000
Liberty Theatre Foundation Inc	\$100,000
Portland Parks Foundation	\$50,000
Cascades Raptor Center	\$30,000
City of St. Helens	\$75,000
Warm Springs Community Action Team	\$100,000
TOTAL	\$853,000

OREGON WINE COUNTRY PLATES MATCHING GRANTS – SB 442 (2011)

Travel Oregon makes awards available, through the Oregon Wine Country Plates Matching Grants Program, to “tourism promotion agencies for wine and culinary tourism promotion.” Travel Oregon administers the program which is funded through sales of the Oregon Wine Country License Plate.

Oregon Wine Country Plates Matching
Grants Program

Up to \$50,000

1:1 match required
up to 50% can be in-kind

*\$510,484 awarded
(2015-2018)*

2015-16:
\$176,315 awarded to 13 projects

2016-17:
\$59,969 awarded to 6 projects

2017-18:
\$90,000 awarded to 6 projects

2018-19:
\$184,200 awarded to 8 projects

“We are thrilled with the assistance of grant funding to kickstart the Crave the Coast food festival. We could not have done the festival without the help of an Oregon Wine Country Plates Matching Grant.”

-Visit Tillamook Coast

EDUCATION & TRAINING

OREGON GOVERNOR'S CONFERENCE ON TOURISM

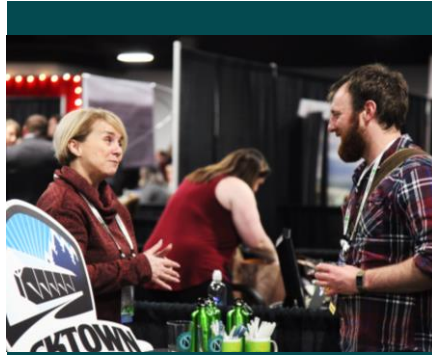
April 14 – 16, 2019 | The Hotel Eugene (*formerly Hilton Eugene*)

OREGON GOVERNOR'S
CONFERENCE ON TOURISM

OregonTourismConference.com



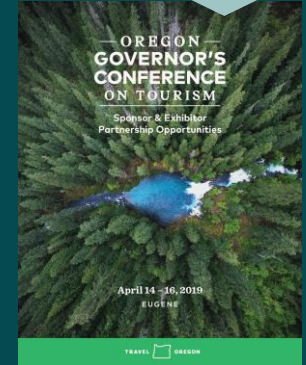
Leverage the latest technology & innovation to grow your business



Build & maintain key relationships within the industry



Network with 500+ like-minded tourism industry professionals



GLOBAL STRATEGIC PARTNERSHIPS

For Oregon to win, we need all our strategic partners at the table.



10TH ANNIVERSARY SCREENING

When it premiered at the Portland International Film Festival on February 5, 2009, "Coraline" wowed audiences and critics alike. On the 10th anniversary of this Oscar-nominated, award-winning film's release, Hillsboro-based LAIKA — in partnership with Oregon Film and Travel Oregon — invites you to experience this wondrous and thrilling adventure as it returns to the big screen.

Part of the #OregonMade Film Series, "Coraline" will be screened in six historic theaters across the state, from Portland's Hollywood Theatre, to the Varsity Theatre in Ashland (the film's fantastical setting). All proceeds will go to the North Umpqua Trail and the Lower Deschutes River Post-fire Restoration Projects to help the recovery efforts in Oregon following the 2017 and 2018 wildfire seasons.

Monday, February 11

6 p.m. VIP Reception: Magnolias Corner
4075 NE Sandy Blvd, Portland, OR 97212

7 p.m. Screening: The Hollywood Theater
4122 NE Sandy Blvd, Portland, OR 97212

Please RSVP to: lisa@traveloregon.com



LAIKA

OREGON
FILM

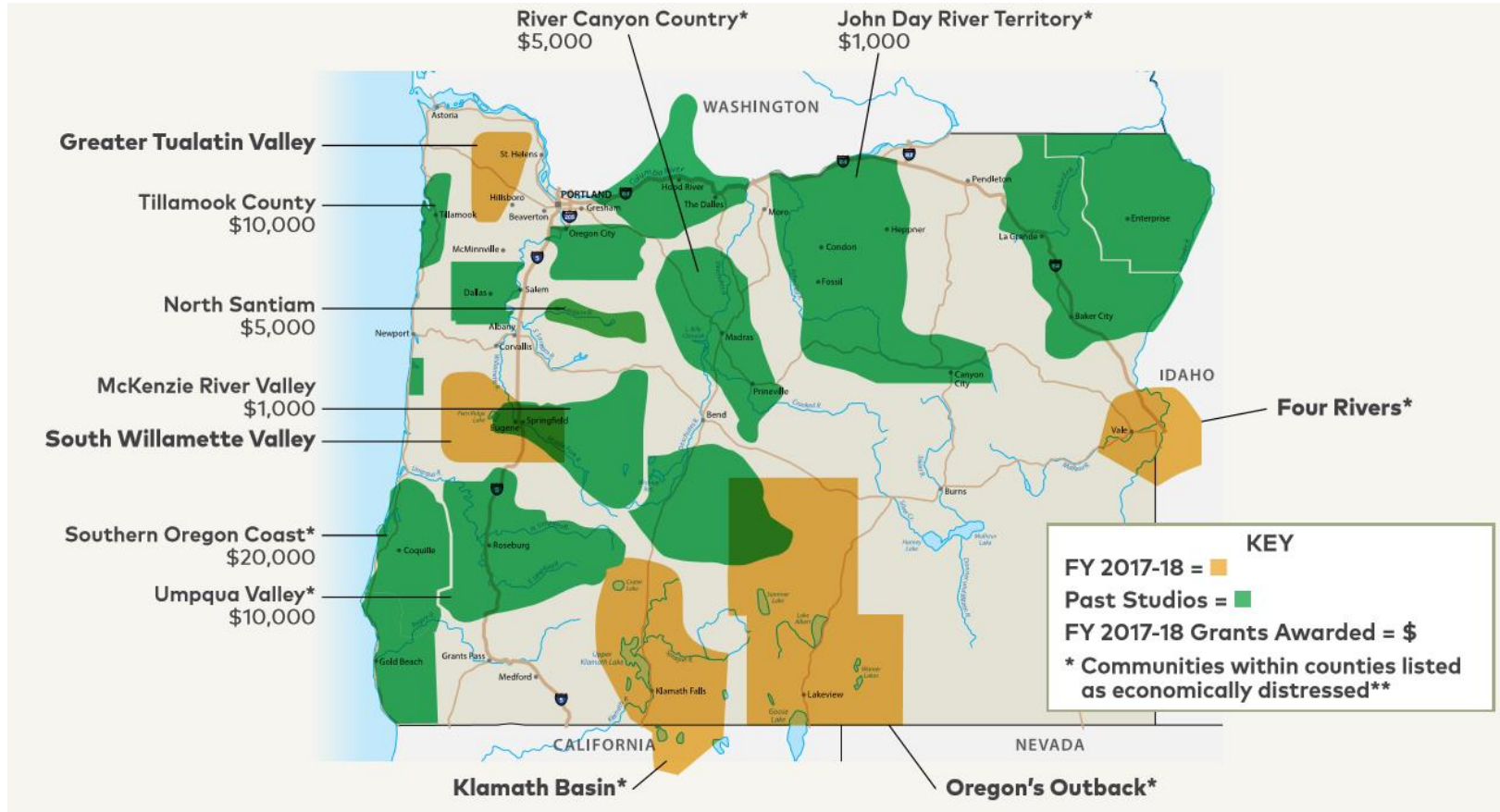
TRAVEL
OREGON



DESTINATION DEVELOPMENT



REGIONAL TOURISM STUDIOS



**Source: Business Oregon, based on data from the U.S. Bureau of Labor Statistics, U.S. Bureau of Economic Analysis and Oregon Employment. December 29, 2017.

OREGON TOURISM STUDIOS: SPRING 2019

RECENTLY COMPLETED: MID-WILLAMETTE VALLEY CULINARY & AGRITOURISM STUDIO

Workshop Part I
Wednesday, March 20, 2019
Corvallis, Ore.

Evening Familiarization (FAM) Tour
Corvallis, Ore.

Workshop Part II
Thursday, March 21, 2019
Corvallis, Ore.

IN-PROGRESS: CLACKAMAS RIVER WATER RECREATION STUDIO

Workshop Part I
Tuesday, April 2, 2019
Estacada, Ore.

Workshop Part II
Tuesday, April 9, 2019
Oregon City, Ore.

Workshop Part III
Tuesday, April 30, 2019
Estacada, Ore.



EDUCATION & TRAINING

OREGON'S GUEST SERVICE GOLD

“9% of customers will leave because they are lured away by the competition, 14% will leave because of dissatisfaction with the product, and 67% will leave because of the attitude of one person in your organization.”

- American Quality Association

UPCOMING PORTLAND TRAININGS

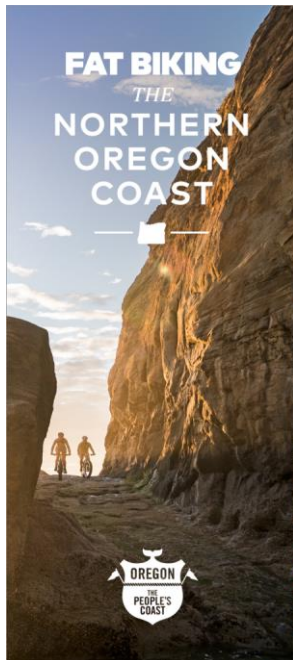
April 22, 2019 | 9:30 a.m. – 2 p.m.
Crowne Plaza Portland – Lake Oswego

April 30, 2019 | 9:30 a.m. – 2 p.m.
Rockwood Public Safety Building – Portland

Additional trainings coming soon to:
Willamette Valley and Mt. Hood/Gorge



TOURISM EXPERIENCE DEVELOPMENT CASE STUDIES



TOOLS TO ENGAGE VISITORS AND LOCAL BUSINESSES



BUSINESS PROGRAM

BIKE FRIENDLY BUSINESS

Oregon loves cyclists. That's why we're the first state in the nation to create a bike friendly business program geared towards travelers.

OBJECTIVES

- Help businesses understand the importance of Oregon's growing bike tourism industry
- Provide tips and tools for how businesses can be Bike Friendly
- Highlight businesses who commit to enhancing the Oregon biking experience for visitors and Oregonians
- Advance Oregon as a premier cycling destination



Submit
Your Application

Tell Us What Bike
Amenities You Offer

Receive & Display
Your Bike Friendly Sign



BUSINESS PROGRAM

TRAVEL OREGON FOREVER FUND

The Travel Oregon Forever Fund provides residents and travelers to Oregon an opportunity to own a piece of the state's sustainability story by giving to projects that make Oregon better. More than **\$200,000** has been raised since 2012 in support of 28 projects across the state.



2018/2019 REGIONAL PROJECTS

Central Oregon
Cascade Lakes Mountain Trail

Eastern Oregon
Oregon Desert Trail

Mt. Hood / Columbia River Gorge
Ready, Set. GORge!

Oregon Coast
Explore Nature

Portland Region
Dirt Lab Evolution at Gateway Green

Southern Oregon
Restoring the North Umpqua Trail

Willamette Valley
Bunchgrass Trail Rehabilitation

GLOBAL SALES



THE INTERNATIONAL VISITOR

TARGET MARKETS

The Americas

Domestic Travel Trade, Canada, Mexico – *Emerging*

Europe

Germany, France, United Kingdom, Scandinavia & The Netherlands

- Advanced booking
- Mid-week & shoulder season
- Supplements domestic business
- Stay longer & spend more (*average*)
- Cancellations are rare

Asia

Japan, China, Korea – *Emerging*, India – *Emerging*

Oceania

Australia, New Zealand

- Sustainable visitor
- Domestic Travel Trade: Groups look for more niche market activities; golf, gardens, coast
- Domestic Travel Trade: Groups have a great economic impact





INTERNATIONAL CONTRACTORS

- 8 contractors in 14 countries: Canada, Australia, New Zealand, Japan, China, United Kingdom, Germany, France, The Netherlands, Scandinavia (Sweden, Denmark, Norway, and Finland)
- Language and Culture
- Foster relationships
- Pitch media & travel writers
- Tradeshows
- Consumer events
- Special Programs
- Track earned media and product

TRADESHOWS & SALES MISSIONS

Canada

- Canada Sales Calls
- Chinese/Canadian Market Mission
- Vancouver Outdoor Adventure Show
- Western Canada Sales Mission
- National Tour Association (NTA) Contact
- Mountain Travel Symposium

United States

- Adventure Travel Trade Association (ATTA)
- American Bus Association (ABA) Marketplace
- International Inbound Travel Association (IITA)
- North American Journeys (NAJ) Summit West
- Go West Summit
- National Tour Association (NTA) Travel Exchange
- North American Journeys (NAJ) East
- U.S. Travel Association's IPW
- Travel Alliance Partners (TAP)
- International Association Golf Tour Operators (IAGTO) - North America Convention

Scandinavia (Iceland)

- Mid-Atlantic

United Kingdom

- World Travel Market (WTM)

The Netherlands

- Vakantiebeurs

Germany

- ITB Berlin

France

- France Sales Mission

Japan

- Japan Association of Travel Agents (JATA) Tourism Expo

China

- China International Travel Mart (CITM)
- Sales Calls/Media Appts.D17
- Brand USA China Sales Mission
- Active America China

Asia (Vietnam)

- International Association Golf Tour Operators (IAGTO) - Asia Golf Tourism Convention

India

- Brand USA India Sales Mission

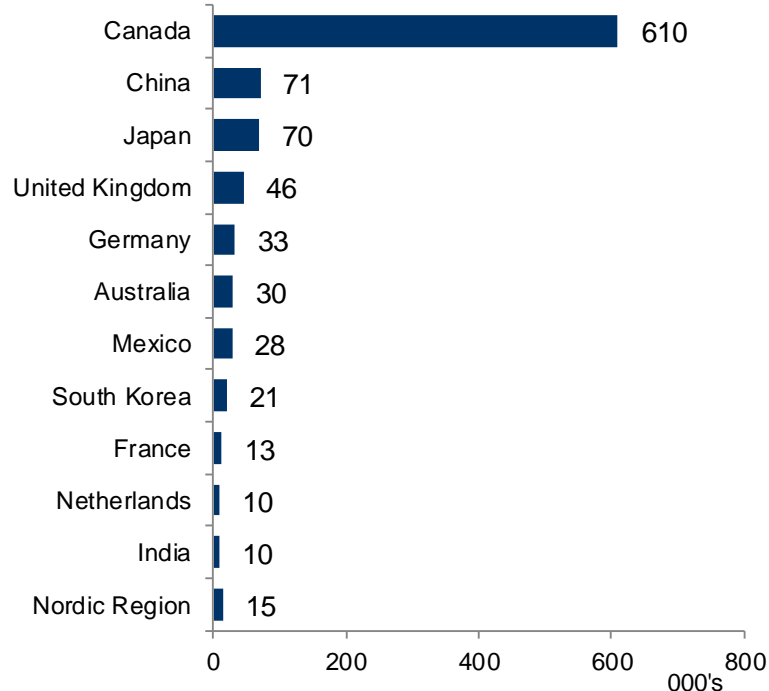
Australia/NZ

- Oceania Sales Mission
- Ski Show Expos

THE INTERNATIONAL VISITOR

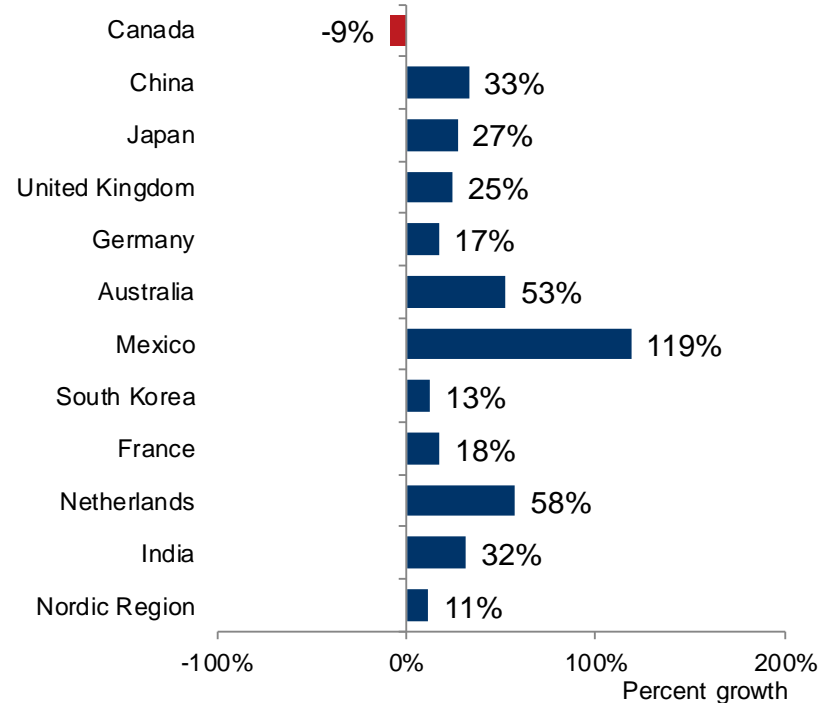
TOURISM ECONOMICS: INTERNATIONAL ARRIVALS

Visits from top 15 markets of origin for Oregon, 2018



Source: Tourism Economics

Total growth in top markets for Oregon, 2013 to 2018

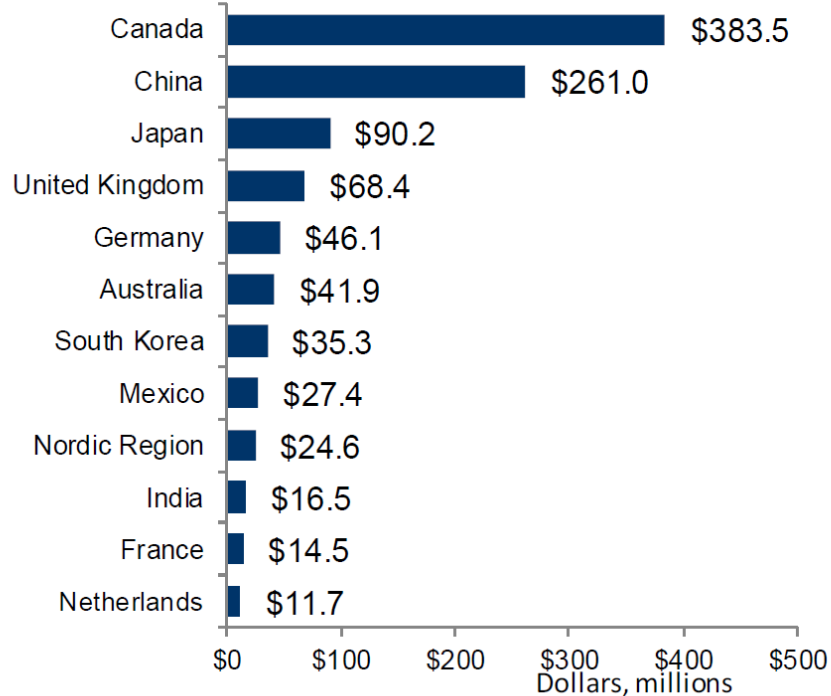


Source: Tourism Economics

THE INTERNATIONAL VISITOR

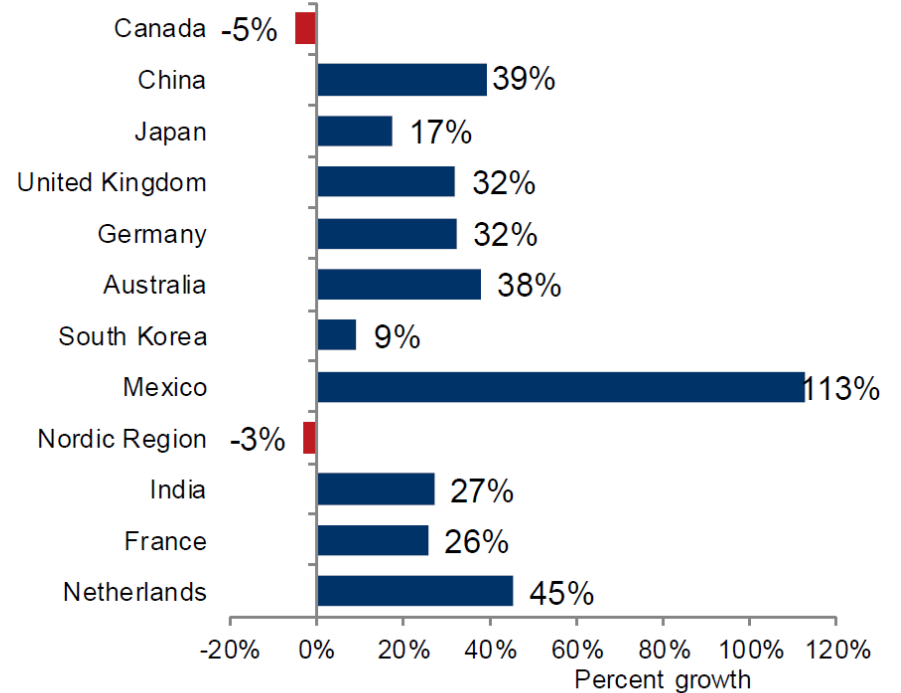
TOURISM ECONOMICS: INTERNATIONAL VISITOR SPENDING

Spending by top 15 markets of origin for Oregon, 2018



Source: Tourism Economics

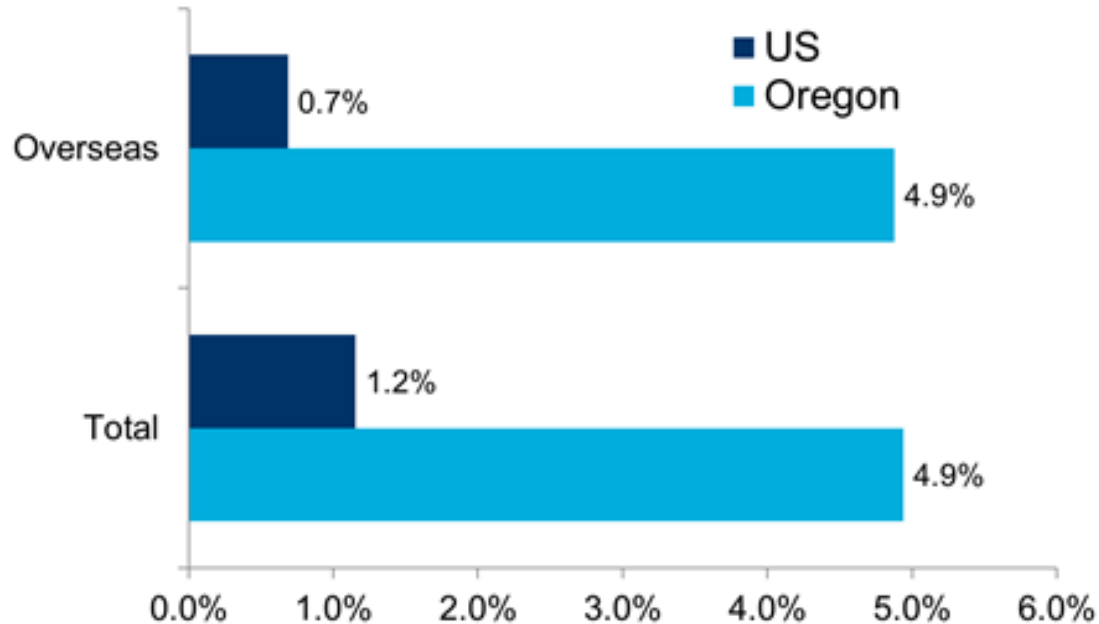
Total growth in top 15 markets for Oregon, 2013 to 2018



Source: Tourism Economics

OREGON OUTPACED THE US IN BOTH OVERSEAS AND TOTAL SPEND

International spending growth in 2018



Source: Tourism Economics

GLOBAL MARKETING





North Umpqua River in the Umpqua National Forest Toketee Falls

THE ACTIVE ADVENTURER

Target Markets: Portland, Seattle, San Francisco

Secondary Markets: Eugene, Bend, Tri-Cities, Boise

Traveled 2+ times domestically in last 12 months exclusively for vacation

Participated in 1+ of these leisure activities in the last 12 months:

- Attended an art gallery
- Went to the beach
- Dined Out
- Camped Overnight

They participate in:

- Mountain Biking / Cycling
- Canoeing / Kayaking
- White Water Rafting
- Skiing / Snowboarding
- Surfing / Wind surfing
- Hiking / Backpacking
- Golf

Ideal vacation is full of activities, exercise, dining and sightseeing

DIGITAL CONTENT

INSPIRATIONAL INFORMATIVE



📷 : Mt. Pisgah by Greg Vaughn

Things To Do • Top Featured
**5 WINTER HIKES
 TO LOVE IN
 EUGENE**

OREGON ELECTRIC STATION

Eugene, Willamette Valley
 27 E 5th Ave.
 Eugene, Oregon 97401

☎️ (437) 485-4444

🌐 WEBSITE



Image Courtesy of the Oregon Electric Station

The Oregon Electric Station is a national historic landmark featuring restored railroad dining cars, a wide list of 20th-century art and fine music on weekends. The Oregon Electric Station is committed and dedicated to quality of product, customer, and hospitality. Menus are globally inspired and artistically crafted, utilizing local, organic, sustainable and locally sourced ingredients. Specialties include artisan ribs, fresh seafood, farm-to-table, and vegetarian options.



📷: @Drew - Seattle - Eugene Food Truck Fest

EUGENE FOOD TRUCK FEST

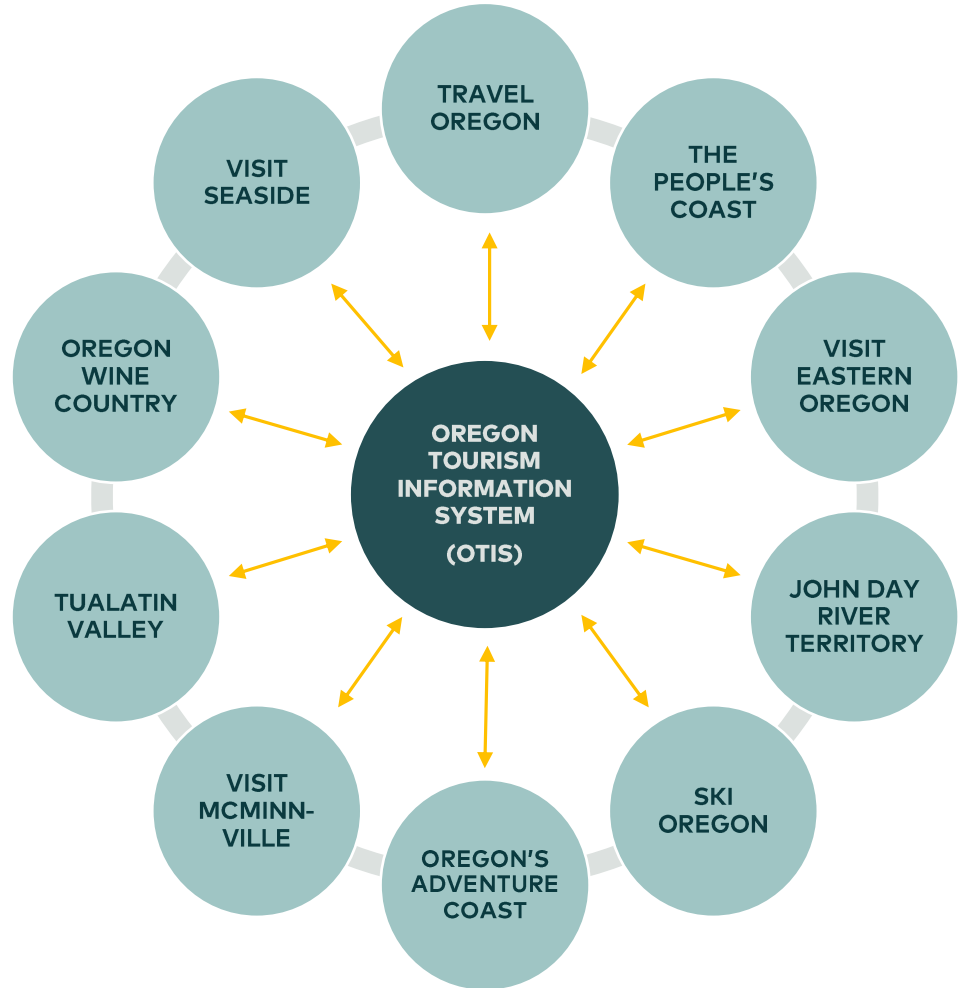
June 26, 2019
 Eugene, Willamette Valley
 704 W 13th Ave.
 Lane Events Centre
 Eugene, Oregon 97402

🌐 WEBSITE



Photo taken on Instagram by Eugene Food Truck Fest. In Eugene Food Truck Fest

Connect and enjoy Eugene's diverse street scene. The 6th annual Eugene Food Truck Fest is the summer event not to miss. There will be great music, live entertainment, a hot air balloon launch, and a "Wild Beer" contest. Pick the one of the many competitors - BBQ, Vegan, Southern, Mexican, Southern.



Car-free Getaway: Taste the Good Life in Eugene

Eugene knows more than a little something about getting around on foot. After all, this is a city that's nicknamed **TackTown USA**. [MORE](#)



Eugene Ale Trail

Move over, Beervans. Eugene is embracing its nascent identity as Brew-gene! While no other city in the world can compete with Portland's saturation of pubs, what's bubbling up in the Eugene area is worth raising. [MORE](#)

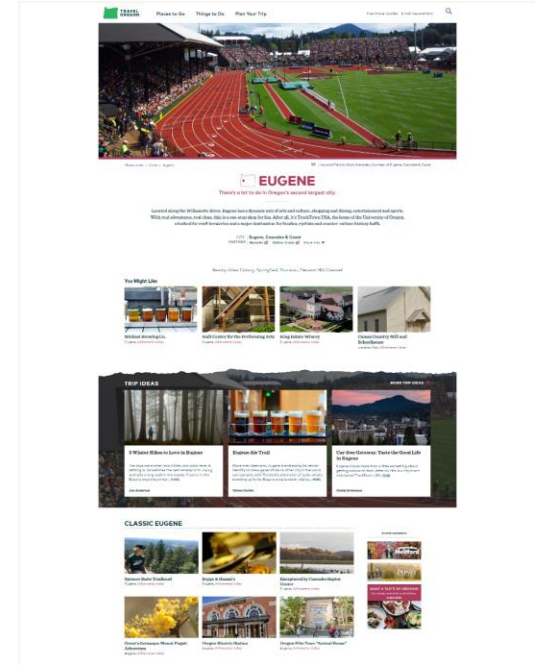
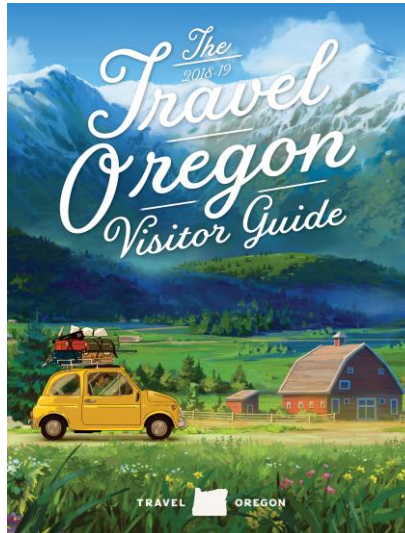


Get a Running Start in Eugene

Spring is upon us, and it's time to lace up your sneakers and get back into shape (or at least off the couch). For a little running inspiration, we suggest a trip to Eugene. [MORE](#)

TELL YOUR STORY EVERYWHERE

Consumers acquire information through a multitude of channels including print, online, email newsletters and social media. Capture the attention of these actively engaged prospects by advertising through a multi-channel approach.



2019 AD NETWORK

Consumers acquire information through a multitude of channels these days spanning print, online, email newsletters and social media. Capture the attention of these actively engaged prospects at the right time and place through a multi-channel approach.



CAMPAIGN TOOLKITS

Destination Marketing Resources

Regional Investments in Tourism

Oregon's Target Markets

Education and Training

Destination Development

Product Development

Destination Management

Matching Grants Programs

Toolkits

Fall Campaign Toolkit

Oregon Wildfire Information

Oregon, Only Slightly Exaggerated Campaign Toolkit

The Power of Travel and Tourism

Oregon Agritourism Handbook

Oregon Scenic Bikeways

TOOLKITS >
Fall Campaign Toolkit

Last spring, we launched the Only Slightly Exaggerated (OSE) campaign and showed the world that Oregon is unlike any other place in the spring and summer, but our state's magic

Facebook, Twitter, LinkedIn, YouTube, Instagram, Email, Print, Share



Toolkit website: <http://industry.traveloregon.com/industry-resources/toolkits/>



INDUSTRY RESEARCH



PRIMARY RESEARCH STUDIES

- Oregon Travel Barometer
- Oregon Statewide Visitor Profile Research
- Oregon Regional Visitor Research
- Economic Impact
- Advertising Accountability
- Niche Research: Outdoor, Cycling, Culinary & Agritourism



COMMUNICATIONS CONSUMER

Forbes

Dive Into Fall With A Trip To Oregon's Pacific Coast



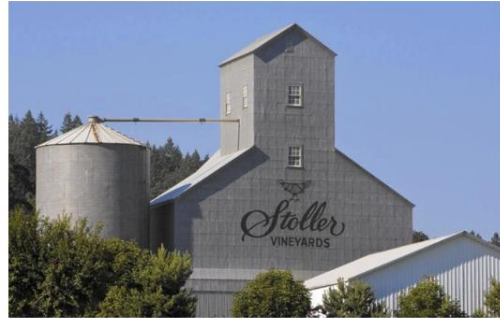
As summer's official end approaches, consider a trip to Oregon's Pacific coast, where fall means fewer crowds, lower prices and temperate weather. And you still get all those spectacular views and beach time.

With more than 350 miles of coastline providing spectacular vistas, the only problem is deciding which path to follow.

Here's one that would be suitable for groups of friends and family or for romantic getaways: Cannon Beach to Pacific City to Newport, about 115 miles from top to bottom.

Chicago Tribune

Water and wine make a perfect pairing in Oregon's Willamette Valley



By **Paul Abererombic**
Chicago Tribune

AUGUST 10, 2018, 8:30 AM | DAYTON, ORE.

Standing at the bow of a little rowboat and chatting with my two companions, I realize I'm not just fly-fishing Oregon's famed McKenzie River; I'm also a student in a floating master class on how chance geologic events made this valley about perfect for two things: growing grapes to make world-class wines, and sustaining some of the country's loveliest wild trout.

THE WALL STREET JOURNAL.



By **Kathleen Squires**

Sept. 27, 2018 11:23 a.m. ET

I SAT ON THE sunny patio of the Oregon City Brewery Co. flummoxed by the vast menu. Should I try a Pipe Dream smoked beer described as “liquid bacon,” or the Plumbelievable! sour ale, brewed with Oregon plums and boysenberries (and which apparently “glows with an incandescent pink-purplish hue”) or one of the other 40-some offerings. I might expect to find such exuberant excess in beer-obsessed Portland, but I was 13 miles south in Oregon City. Better known in recent years, if known at all, as a struggling lumber town and an early American historical site, Oregon City is setting fresh tracks.



COMMUNICATIONS INDUSTRY



Oregon Outdoor Recreation Initiative

*Phase One
Summary Report*

September 2017

TRAVEL  OREGON



contribute



News

[Local](#) | [Environment](#) | [News](#)

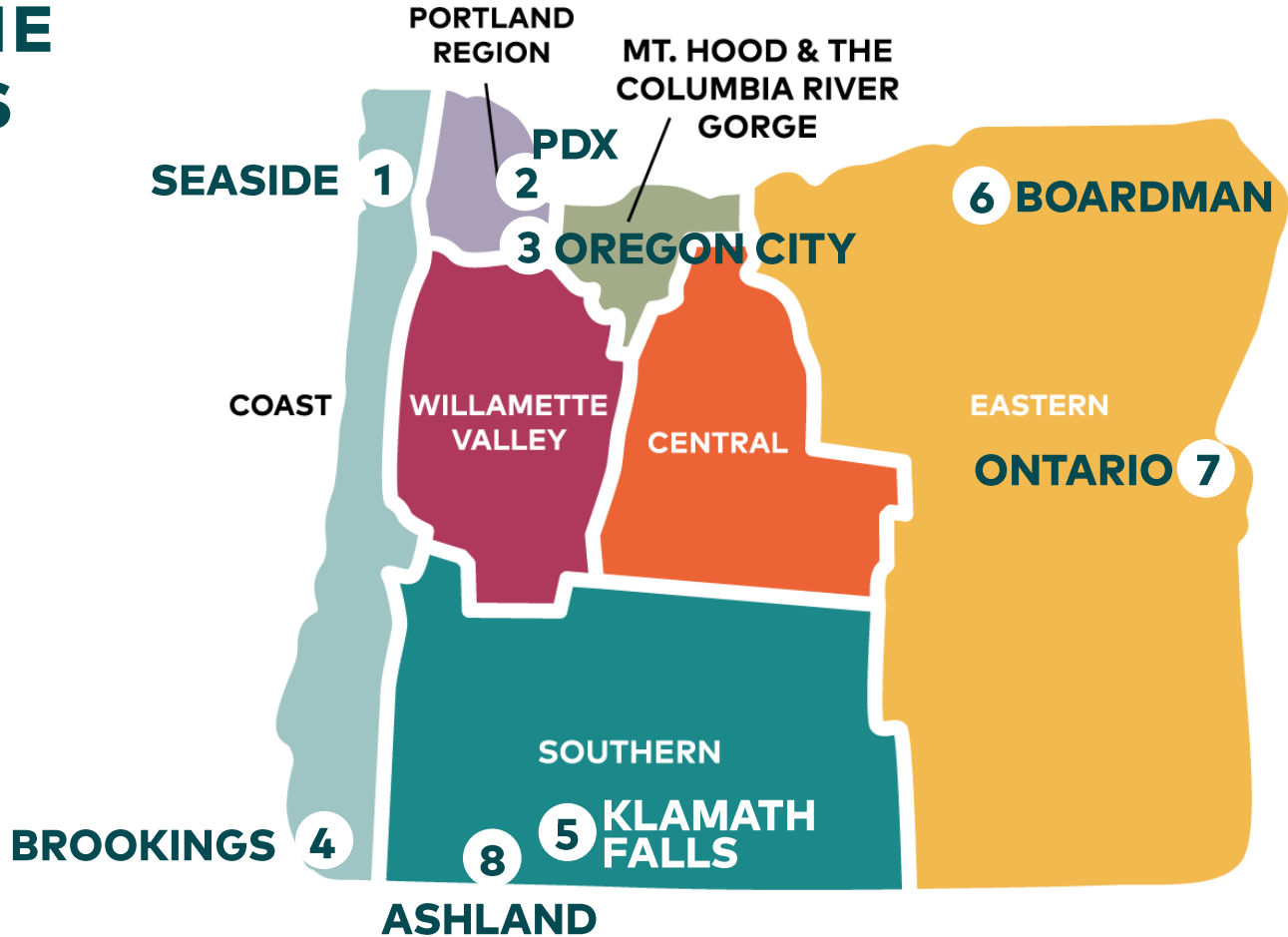
After \$51M Tourism Loss To Wildfires, Oregon Wants Visitors To Come Back

by [Ericka Cruz Guevarra](#) [Follow](#) OPB Aug. 23, 2018 11:01 a.m. |

Updated: Aug. 23, 2018 12:25 p.m. | Portland, Ore.

An arm of Oregon's Tourism Commission wants to warm tourists up to the idea of vacation in Oregon despite a summer of

WELCOME CENTERS



ASHLAND WELCOME CENTER



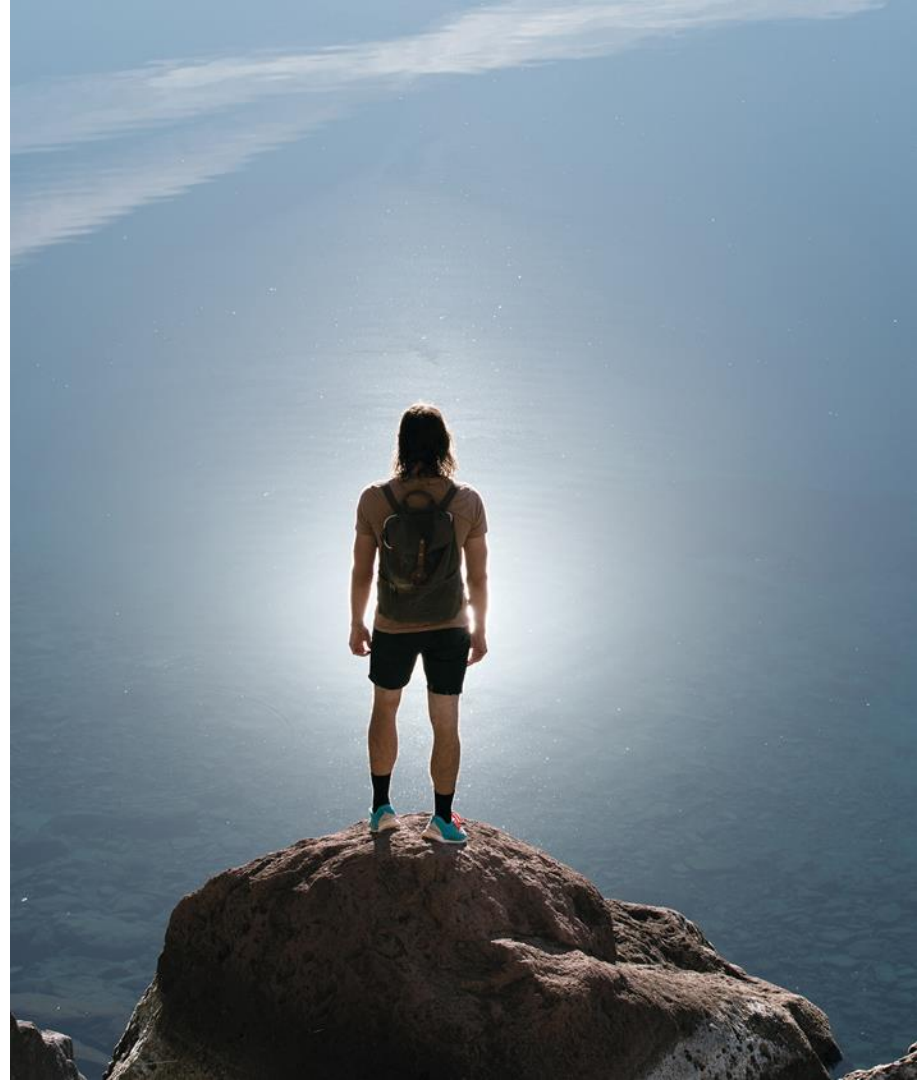
An aerial photograph of a forest floor. The ground is covered in a dense carpet of vibrant green moss. Scattered throughout the moss are numerous dead, greyish-brown tree trunks and branches, some standing upright and others lying horizontally. The lighting is soft, highlighting the texture of the moss and the skeletal remains of the trees.

TRAVEL OREGON
IN ACTION

TOTAL SOLAR ECLIPSE CASE STUDY: WHAT WORKED?

What helped make the eclipse a successful event?

- Broad collaboration
- Planning ahead
- Depending on the experts
- Aligned messaging
- Sharing a common goal
- Being prepared for anything



SUPPORTING OUR PARTNERS/REGIONS AFFECTED BY WILDFIRES

PREVENTION

Wildfire Video

- Travel Oregon has put together a PSA wildfire video for Oregon residents and visitors.
- <https://traveloregon.com/wildfire>

Public Agency Wildfire Prevention Messaging

- Travel Oregon works with its agency partners, including ODF, ODOT, USFS and others, to distribute targeted messaging to the public around fire prevention.
- We are preparing for May Wildfire Awareness Month

Wildfire Toolkit

- The safety of our residents and visitors is our first priority and it's important we're all providing consistent messaging regarding wildfires, closures and air quality. This toolkit is developed for Travel Oregon's industry site:
<http://industry.traveloregon.com/industry-resources/toolkits/oregon-wildfire-information/>

SUPPORTING OUR PARTNERS/REGIONS AFFECTED BY WILDFIRES

DURING

Travel Oregon Cross-Functional Wildfire Team

- Provide nearly daily wildfire condition updates internally to staff, leadership and welcome centers.
- Travel Alerts page provides up-to-date information for visitors in Oregon as well as WA and CA.
- Utilize Basecamp to reach out to RDMOs during natural disaster events (flooding, wildfire) to receive timely and on-the-ground information about how natural disaster is impacting local communities.

West Coast Tourism Recovery Coalition

Travel Oregon has partnered with Visit California and the Washington Tourism Alliance to form the West Coast Tourism Recovery Coalition. www.WestCoastFacts.com

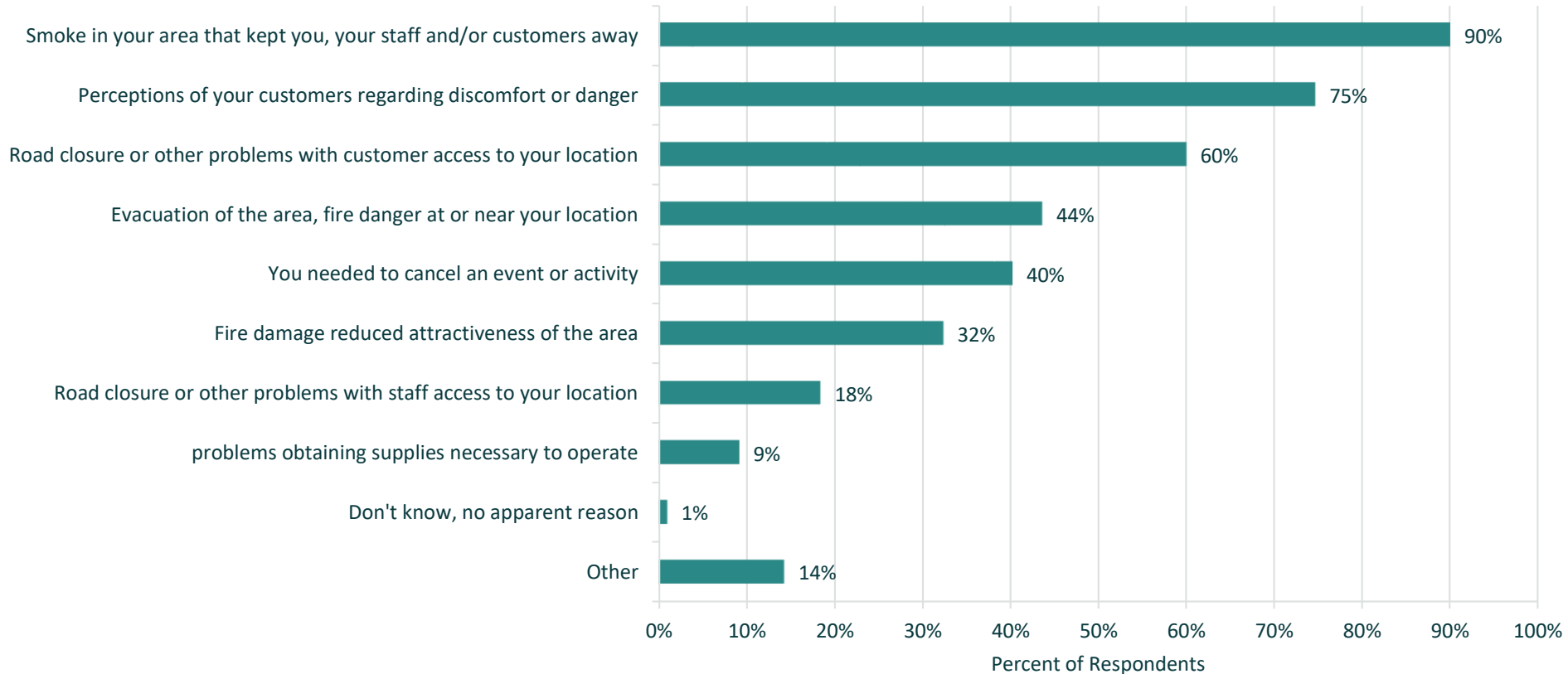
RECOVERY

Natural Disaster Marketing Co-op

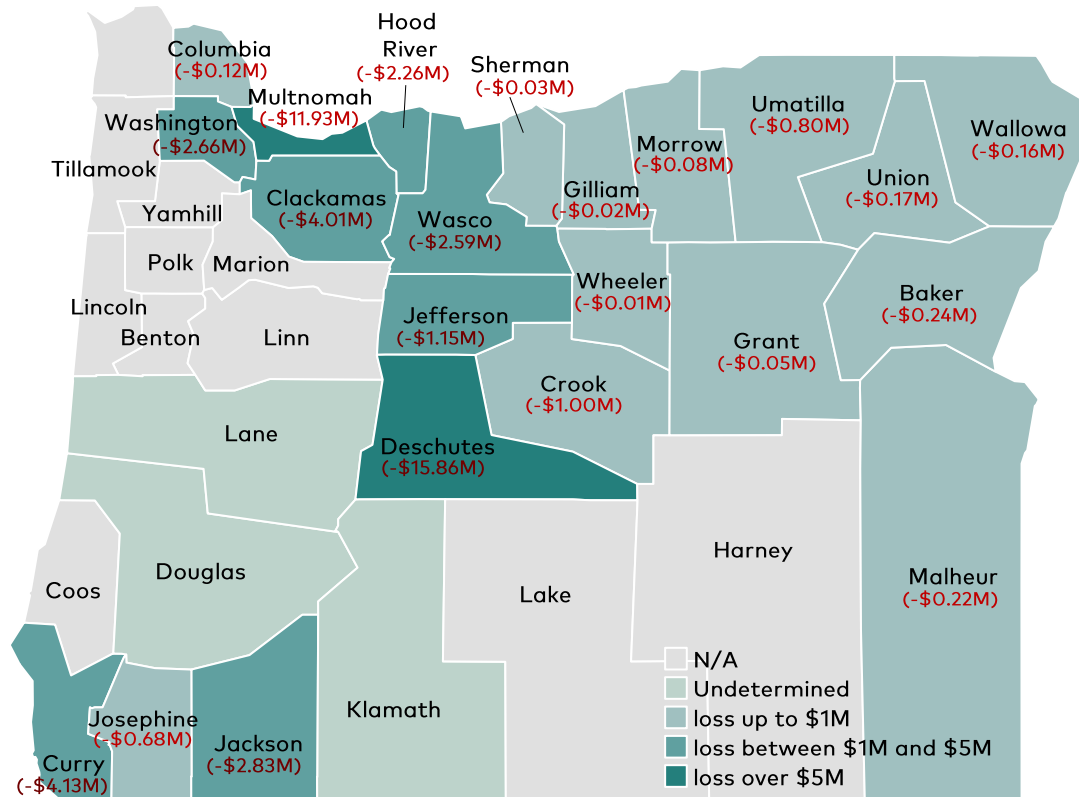
Travel Oregon developed an opportunity for RDMOs to leverage resources and create a responsive marketing program that is community or region specific to aid those who have been impacted by an external shock.

ECONOMIC IMPACT OF WILDFIRES IN OREGON ('17)

REVENUE LOSS DUE TO FIRE - PERCEIVED CAUSE



WILDFIRE RELATED VISITOR SPENDING LOSS 2017 BY COUNTY, \$ MILLIONS - \$51.1 Million Total

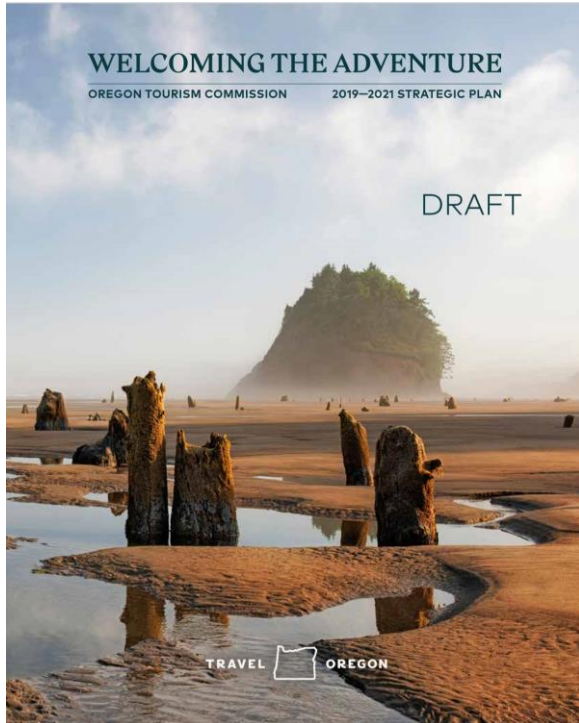


Source: Dean Runyan Associates

NATURE OF WILDFIRE IMPACTS PERCEIVED BY VISITORS

	% OF IMPACTED VISITORS
Visited but smoke impacted some activities	33%
Changed trip to a non-impacted area of Oregon	28%
Visited but experience hampered by smoke	27%
Postponed travel to Oregon	17%
Shortened stay in Oregon	16%
Cancelled travel to Oregon	9%

2019-21 DRAFT STRATEGIC PLAN



SUPPORT AND EMPOWER OREGON'S TOURISM INDUSTRY

Travel Oregon's earliest efforts centered on developing marketing messages that gave life to the Travel Oregon brand. The 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 know 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. Down great situations can be made long 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.



JAMESON HENRIKSEN/STUDIO B BACONING ONLY/SHUTTERSTOCK

SUPPORT AND EMPOWER OREGON'S TOURISM INDUSTRY



North Coast Tourism Studio in Clatsop.



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 detailed inventory of all of our programming to ensure it's at the top of its game, consistent and effective in its communications and branded to support the needs of the evolving industry through offerings such as the Global Sales Summit, Global Market Updates and a Rural Tourism Conference.

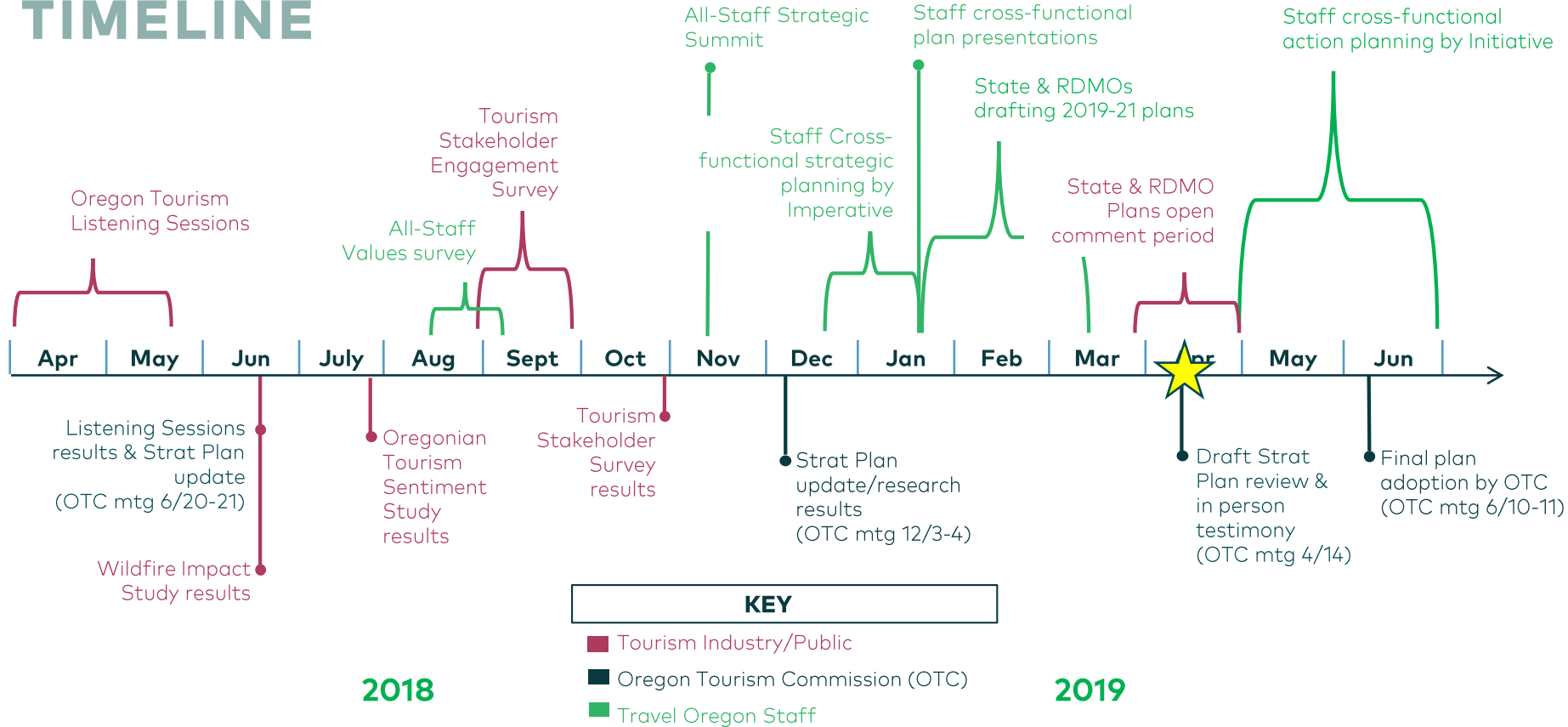
This also means we'll be assessing Oregon's tourism workforce overall—diving deeper to understand the needs and opportunities across the state. We will expand partnerships and leverage programs with others working to train and educate Oregon's tourism workforce, such as Oregon Restaurant and Lodging Association's Guest Service Gold program, Chemeketa Community College's student winemaker program, and OCU 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.



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 acted as an industry-wide information network to help facilitate margins in visitors—like the solar eclipse in 2017—or unexpected challenges like responding to regional wildfires. Moments like these prove 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

STRATEGIC PLAN TIMELINE



2019-21 STRATEGIC PLAN PROCESS SUMMARY

- **March 28th - 2019–21 Draft Strategic Plan Open for Comment & Commission Meeting notice sent to:**
 - Governor, Legislature, Business Oregon, State of Oregon partner agencies and industry trade associations
 - Tourism Industry Partners via Industry e-newsletter (4437)
- **April 14th - Public Hearing on 2019-21 Draft Strategic Plan**
- **April 15th – 2019–21 Draft Strategic Plan shared at annual Governor's Conference on Tourism**
- **May 1st - Public Comment period closes**
- **May 24th - Commission Meeting notice & Commission packets sent (including comments received on 2019-21 Draft Strategic Plan)**
- **June 10th - Commission Briefing in Joseph**
 - Review of final 2019-21 Draft Strategic Plan & Budget
- **June 11th - Commission Meeting in Joseph**
 - Adoption of Travel Oregon 2019-21 Strategic Plan & Budget

STATEWIDE DESIRED TOURISM PRIORITIES & FOCUS AREAS

Workforce & Training

- Educate community leaders and policymakers (local, county, state) on value of tourism and its viability as a long-term career

Stakeholder Engagement & Collaboration

- Assist stakeholders with educational advocacy related to local tourism initiatives
- Help small businesses and rural communities engage with the tourism industry and understand role in it

Destination Development & Management

- Help address the current demand on outdoor/natural resources and identify plans to mitigate its impact
- Foster diversity and welcoming, open tourism attractions and destinations

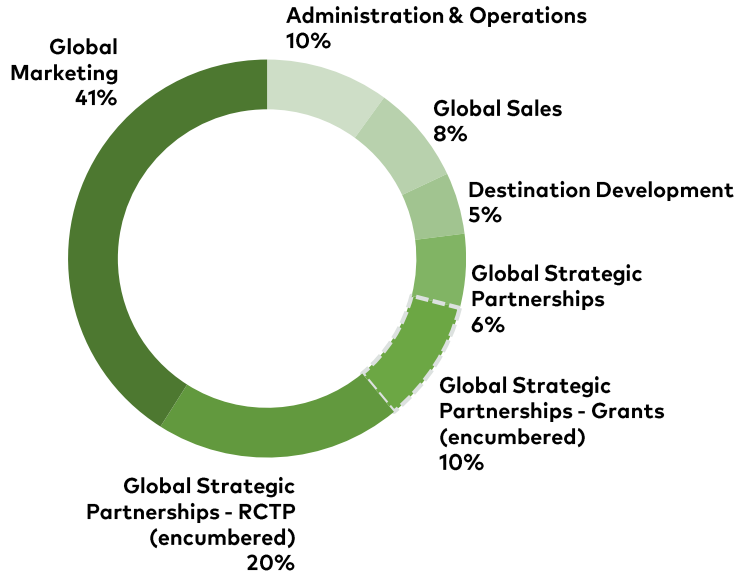
Marketing & Promotion

- Evaluate promotions to identify awareness gaps of unknown experiences and smaller communities

Infrastructure & Transportation

- Evaluate current infrastructure of key destinations and their ability to absorb increased marketing promotions/reach and rising visitation numbers

2019-2021 DRAFT BUDGET



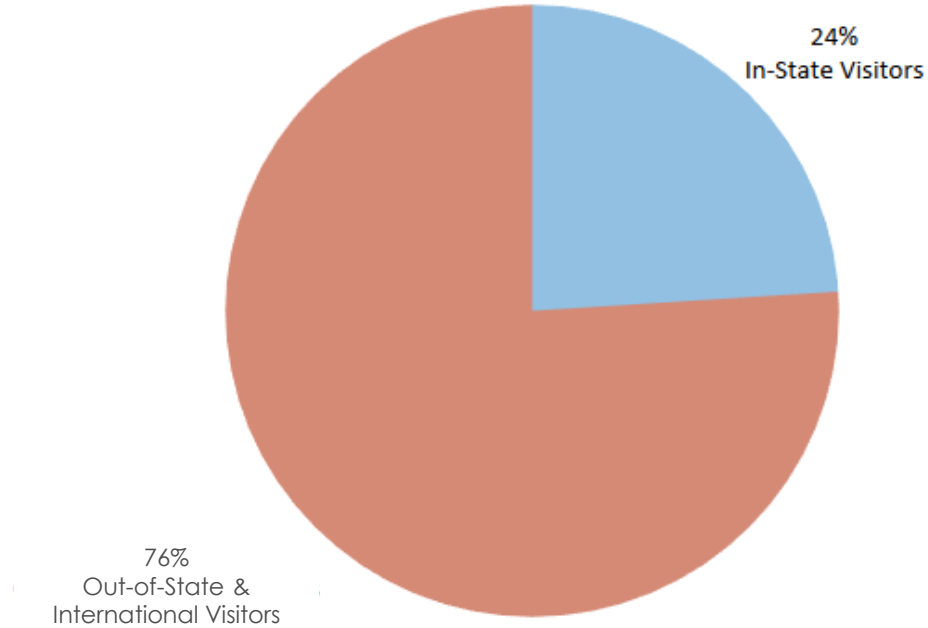
State Lodging Tax Revenue	76,700,000
Other Sources	400,000
TOTAL	77,100,000

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

RETURN ON INVESTMENT

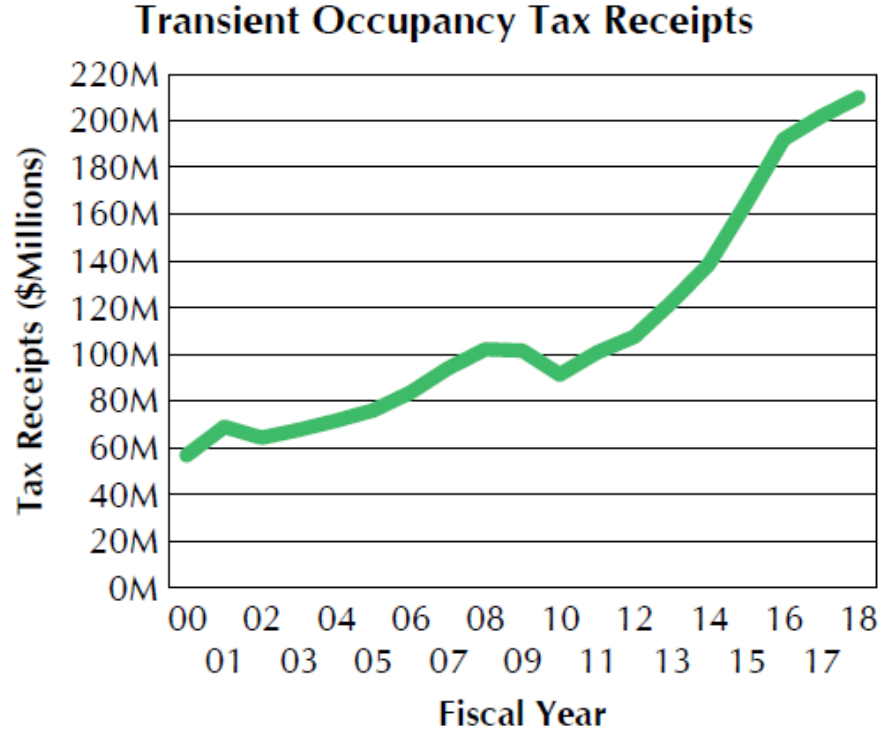


VISITOR SPENDING FROM OVERNIGHT VISITORS



Source: Tourism Economics & Dean Runyan Associates, 2018

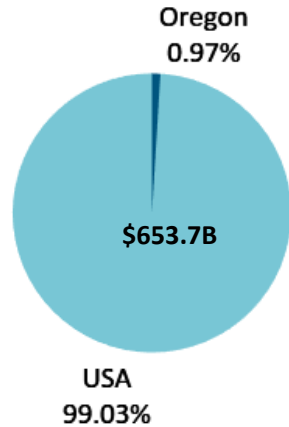
GROWTH IN LOCAL TRANSIENT LODGING TAX



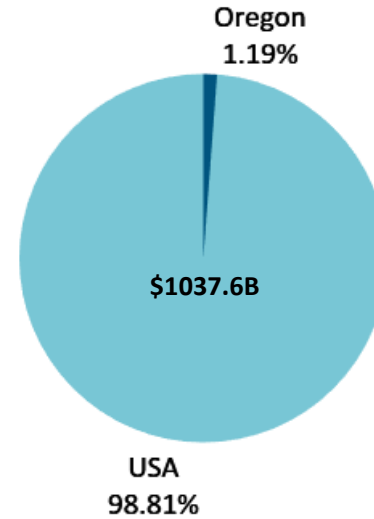
Source: Oregon Travel Impacts 1991-2018, Dean Runyan

SHARE OF VISITOR SPENDING

2005



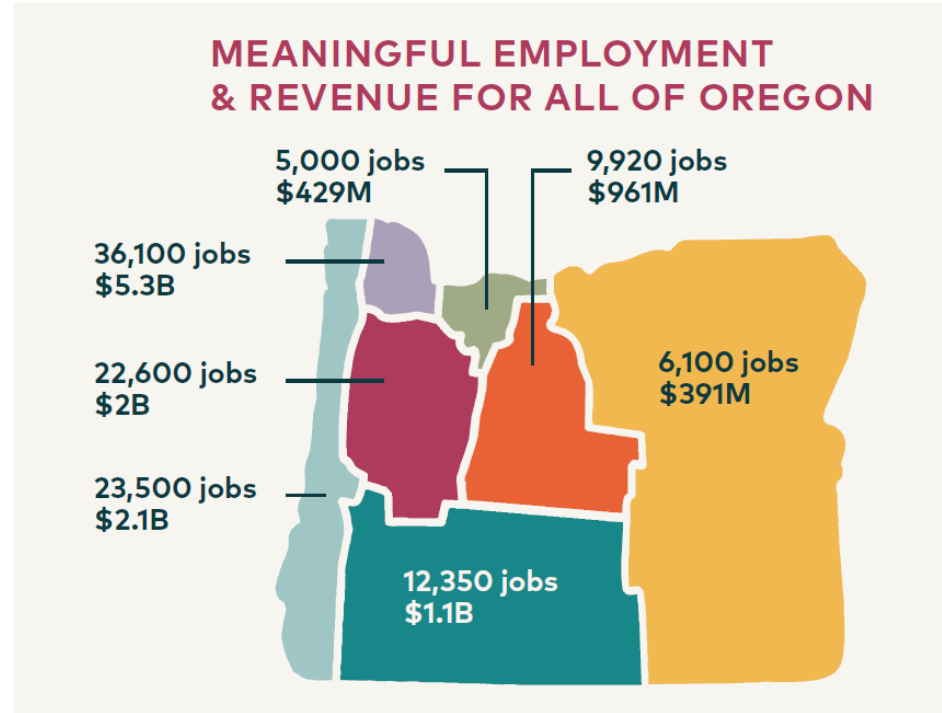
2017



OREGON TOURISM PERFORMS FOR OREGONIANS

	2003	2018	CHANGE
Direct Employment	84,500	115,400	+37%
Employee Earnings	\$1.7 billion	\$3.6 billion	+111%
Visitor Spending	\$6.5 billion	\$12.3 billion	+89%
Taxes (State/Local)	\$246 million	\$560 million	+128%

The travel industry is one of the 3 largest export-oriented industries in rural Oregon counties (the others being agriculture/food processing, and forestry/wood products).



An aerial photograph of a winding river flowing through a vast, green, grassy landscape. The river is dark blue and meanders across the terrain, which is dotted with small, dark green shrubs and patches of lighter green grass. The text "Thank you" is overlaid in the center of the image in a white, serif font.

Thank you