

TRAVEL OREGON 2023-2025 STRATEGIC BIENNIAL PLAN

Oregon Tourism Commission

TRAVEL  OREGON

ABOUT TRAVEL OREGON

The Oregon Tourism Commission (OTC), doing business as Travel Oregon was formed in 1995 and granted semi-independent agency status in 2003 by the Oregon state legislature. Funded by the 1.5% statewide transient lodging tax, Travel Oregon carries out statewide work as the official destination management organization — directly investing 30% into Oregon’s tourism industry and communities through the dedicated Regional Cooperative Tourism Program and competitive grants program.

A nine-member board of commissioners, including five lodging representatives, three tourism industry-at-large representatives, and one public-at-large representative (ORS 284.107), are appointed by the governor to oversee the agency and approve the budget and strategic plan that directs the actions of the Travel Oregon staff.

The commission aims to improve Oregonians quality of life by strengthening the economic impacts of the state’s \$13.9 billion tourism industry, which employs over 117,000 Oregonians.



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VISION

Oregon is a welcoming destination where tourism drives economic prosperity, benefits the natural environment and celebrates rich, diverse cultures.

MISSION

We inspire travel that uplifts Oregon communities. Collaborating with stakeholders and partners to align as stewards of Oregon, we work to optimize economic opportunity, advance equity and respect the ecosystems, cultures and places that make Oregon...Oregon.

VALUES

INTEGRITY

Our words match our actions. We measure the impact of our work, celebrate successes, adapt and change course when necessary, and continually improve together.

EQUITY

We lead through a lens of racial equity and commit to making systemic changes, so Oregon is a more equitable place to live and visit.

COMMUNITY

We honor the people, cultures and places of Oregon. We nurture our relationships with colleagues, the tourism industry and local communities as we collaborate to make better Oregon experiences.

STEWARDSHIP

We lead through a lens of destination stewardship to build resiliency for a regenerative future.

OBJECTIVES & STRATEGIES

These four interconnected objectives will bring our mission to life — helping us reach our vision with priority strategies.

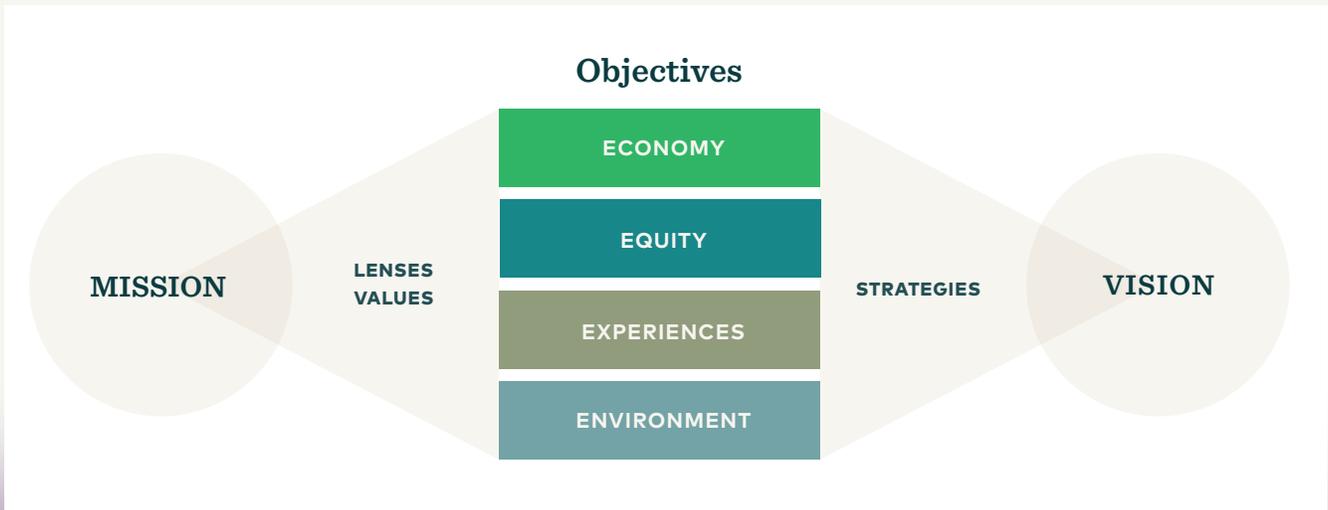
» Oregon's tourism economy is flourishing.

» Oregon is striving to be a place of equity.

» Oregon delivers remarkable experiences.

» Oregon respects its natural environments.

5



10-YEAR STRATEGIC VISION

SPORTS
fitness
weight training

736 purple





While strategic and actionable in nature, as the 10-year vision outlines, this strategic plan is a high-level road map, focusing on the work we hope to accomplish over the next two years. This plan is not intended to be an exhaustive portrait of how we anticipate supporting each of the important and varied tourism experiences across Oregon. Rather, this plan identifies key strategies to focus on first, building upon and providing foundational support for future strategies. This plan provides the guidance and structure that allows us to uplift all communities and niche products and activities across the state. Remaining nimble and responsive to the needs of our residents, industry and visitors, the tactics to accomplish this work will continue to evolve as we support the ever-changing needs of our industry and our partners.

The work we undertake as a destination management organization is rooted in our purest intention to be in service to the industry and our desire to be ever responsive to the needs of our stakeholders. Developing a strategic vision that focuses on long-term success and strengthens our state's economy while benefiting its communities, cultures and environments is not something we could ever do alone. The success of our industry relies on strong partnerships. To ensure that we are always in lockstep with the industry we serve, alignment with our stakeholders is key. Read more about the listening and learning journey we embarked upon in partnership with stakeholders in the tourism industry, across government agencies, with Oregon's nine federally recognized tribes and other diverse stakeholders to create the objectives and strategies outlined in [Travel Oregon's 10-Year Strategic Vision](#).

According to independent research, every \$1 spent in advertising generates \$157 in new visitor spend and \$8 in state and local taxes.

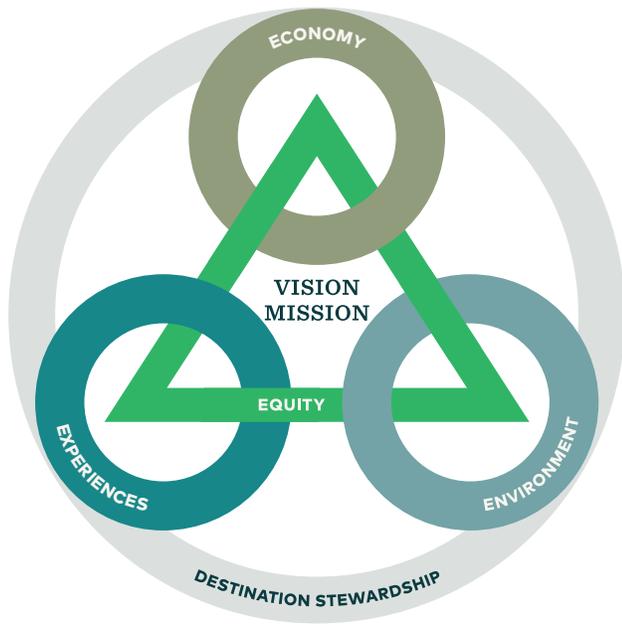
Destination Stewardship

As the destination management organization for Oregon, Travel Oregon has developed a three-pronged destination stewardship approach to guide our decisions, programming and actions within the 10-Year Strategic Vision. Through this approach, which seeks to meet the economic, environmental and social/cultural needs of a destination in close partnership with the destination's tourism industry and residents, we will employ three lenses:

- Prosperity Lens
- Racial Equity Lens
- Regenerative Tourism Lens

These three lenses help us thoughtfully plan the journey so we can successfully reach our destination. Applying these lenses means asking critical questions that will be instrumental in fulfilling our strategic vision over the next decade. In some cases, we will continue to strengthen and improve work already underway. In others, the destination stewardship approach encourages us to learn and work together. Learn more about the destination stewardship approach and how it will inform decisions through the lenses of **Prosperity, Racial Equity and Regenerative Tourism** in the [10-Year Strategic Vision](#).

For the next decade, this strategic vision serves as a road map to guide Travel Oregon in work we undertake in each biennial plan — from the advertising campaigns, promotions and destination or community projects we develop alongside the industry to the grant dollars we deploy and hiring decisions we make. The objectives laid out in our strategic vision will help us stay on course while biennial planning and budgets will allow us to adapt our work to remain responsive to the most timely and significant opportunities and needs of our residents, industry and visitors. Strategies may change or evolve with each biennial plan, but the strategic vision will serve as our North Star and guide and inform the goals we want to achieve as an agency, and a leader of Oregon's tourism industry.



From our inception, Travel Oregon has been rooted in economic development. When we say our vision is that of a welcoming state where tourism drives economic prosperity for all, this means ensuring tourism remains a strong contributor to Oregon’s economy.

Travel Oregon Transformed

To achieve the vision and outcomes set forth in our 10-Year Strategic Vision, Travel Oregon has also been undertaking our own transformation to ensure we are organized efficiently and have well-designed internal structures and processes to support our partners. In many cases, we will continue to strengthen and improve work and programs already underway. In others, the destination stewardship approach encourages us to learn and work together as we develop action plans associated with our strategies.

One of the first areas of our transformation has been to evolve our organizational structure to enable our departments, functions and roles to best serve and implement the 10-Year Strategic Vision. At the time of the development of this biennial plan, we are in the final stages of rolling out our new organizational structural design. We are excited to share with you our redesigned departments and functions:

Brand Stewardship

The sales and marketing functions are combined into a new department called Brand Stewardship. This department will provide stronger connection in how our campaigns and promotions inspire travel to Oregon from local, national and international markets.

Brand Stewardship is all about our presence in the markets and building brand awareness. Merging our marketing and sales teams is a strategic opportunity

to enhance our impact on a global scale. Several aspects of sales and marketing are staying the same in terms of content creation, advertising campaigns, international representation and tour operator promotions. However, through this merger, we now have the ability to provide an internal hub of support for both the marketing and sales efforts, further enhancing our efficiency, effectiveness and impact.

Core Functions

- Advertising
- Branding
- Integrated Marketing
- Promotions
- Sales

Destination Stewardship

The functions of Destination Development, Grants and Regional Cooperative Tourism Program (RCTP) were combined into a single department called Destination Stewardship. These functions all have programs that are responsible for people, products and places that enrich visitor and resident experiences. The combination of these functions allows for more collaboration at an implementation level and at a strategic level. This will allow us to be more cohesive and better aligned to similar goals, especially the objective in our strategic vision to deliver remarkable experiences.

Much of what is currently being done stays the same in providing technical assistance and funding to our regions, communities and industry partners. The products and services currently provided such as training, toolkits and case studies — all those are at the heart of this group. This department will enhance our partnership with, and support of, our regions while ensuring alignment and engagement with regional partners in all of our destination stewardship efforts.

Core Functions

- Destination Stewardship
- Stewardship Investments
- Regional Based Services



Insights & Impact

This new department is an innovation for Travel Oregon and will allow us to have a unified agency strategy that's monitored for impact and effectively shared with others. Insights & Impact integrates and activates destination stewardship and pairs it with advocacy, engagement, research, agency strategy and performance.

At its core, Insights & Impact is about serving the entire agency with more strategic services and keeping us aligned as one enterprise, both in our work and how the impact of our work is communicated. This team will manage our agency strategy and planning processes. It will keep us on track for implementing our 10-Year Strategic Vision. This group will include a new Stewardship function that will be the hub for how we adopt the three lenses. Strategically aligning research and strategy with engagement and communications will allow us to share our impact and tell those quantitative and qualitative stories more effectively. The strategy and performance management function includes business insights and will have a new portfolio management function of coordinating work across the agency and managing to capacity.

Core Functions

- Industry Advocacy & Engagement
 - Internal & External Communications
 - Research / Insights / Analytics
 - Portfolio Management
 - Strategy & Performance Management
-

Administration

The Administration department will continue to support all areas of the organization through operations, finance, accounting, compliance and our people, culture and equity work. The biggest change in Administration is scaling for growth and ensuring that the concept of these services operates with a business partner model. Also changing is the movement of Visitor Services to be part of this department. When looking at the primary function of Visitor Services, it was identified that this function could be best supported by close alignment with facilities, operations and administrative functions.

Core Functions

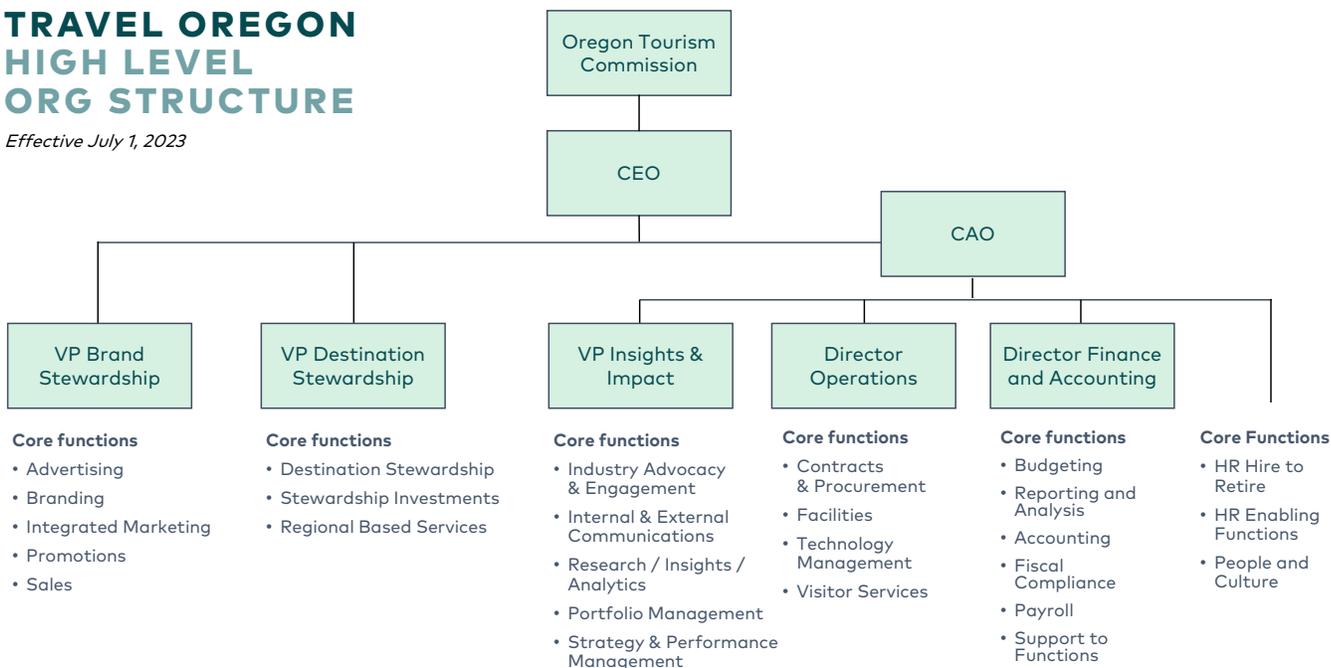
- Contracts & Procurement
 - Facilities
 - Technology
 - Visitor Services
 - Budgeting, Accounting & Fiscal Compliance
 - Human Resources Support
-



The new organizational design will increase capacity and staffing across the agency and includes the creation of a Destination Stewardship team that will expand regional destination development services and better align the Regional Cooperative Tourism Program (RCTP) and grants programs; a Brand stewardship team that combines and expands existing marketing and sales teams; an Insights & Impact team that will invest in and optimize alignment between research, public affairs and policy, communications and industry relations; and an expanded administrative team to guide investments in our people and culture to ensure the agency can efficiently and effectively implement the 10-year Strategic Vision.

TRAVEL OREGON HIGH LEVEL ORG STRUCTURE

Effective July 1, 2023



2023-2025 BIENNIAL PLAN





Jak Wonderly

2023-2025 Strategies

The 2023-2025 biennial strategic plan was developed with the strategic vision as a framework — helping us stay on track and monitor our progress toward achieving our vision. The strategies prioritized in this plan support the four interlocking objectives in the 10-Year Strategic Vision.

Recognizing the aspirational and long-term work needed to fully attain the 10-Year Strategic Vision, 12 strategies that focus on identifying, developing and promoting experiences that make Oregon a thriving place to live and to visit have been prioritized in the 2023-2025 biennial plan. These are strategies that bolster regenerative tourism business and product development in urban and rural areas, and on tribal lands, providing visitors with immersive Oregon experiences. Strategies that move beyond leaving a place like you found it, but actually leaving it better. Strategies that will create jobs, respect our natural environment and preserve quality of life for all who call Oregon home.

As with the development of this strategic vision, the industry partners seated at the table will be key. Travel Oregon will continue to engage, listen and respond to the needs of our partners, stakeholders and industry as we develop and implement the specific action plans needed to make these 12 strategies a reality.

Integrating Equity Into Our 2023-2025 Strategies

We understand that leading with a racial equity lens is necessary to transform institutions and systematic policies and practices to achieve equity and justice for all. To ensure that Oregon is striving to be a place of equity, we must embed our racial equity lens into all our work. This means starting with Travel Oregon first. Building our internal capabilities to apply our racial equity lens to all programming will help us answer the “why” behind each program.

In addition to embedding the racial equity lens into our programs, we also understand that we need to evolve our operations to provide equitable opportunities at all levels. This includes our internal and external recruitment efforts, our contracting and procurement approaches and utilizing a racial equity lens for decision-making. We understand that this is a journey that will evolve over time to ensure diversity, equity and inclusion (DEI) is emphasized and integrated agency-wide, from programming and procurement to employee recruitment and training.

Knowing that any good strategic plan starts with prioritizing a few key strategies and developing specific action plans to operationalize the strategies, we have selected four external strategies to serve as the first wave to help us move from strategy to action. These strategies are captured on the 2023-2025 Strategic Overview as the Initial Wave of Priority Strategies.

2023-2025 Strategic Overview – Initial Wave of Priority Strategies

<p>Objectives</p>	<p>Oregon’s tourism economy is flourishing.</p> <p>Oregon’s tourism industry contributes to strong, balanced and optimized economic growth.</p>	<p>Oregon delivers remarkable experiences.</p> <p>Stakeholders are aligned on the identification and promotion of experiences making Oregon a thriving place to live and visit.</p>		
<p>Prioritized Strategies</p>	<p>Improve perception of the value of tourism and increase advocacy among industry workforce, residents and policymakers.</p>	<p>Reduce high visitation pressures and increase community livability by investing in the development of niche tourism product that is based on growing visitor demand and Oregon’s competitive advantage (e.g., outdoor recreation, culinary, agritourism, arts and culture).</p>	<p>Provide resources and assistance to tourism-related businesses, organizations and communities that are experiencing, or have recently experienced, crises (e.g., wildfires, drought, global pandemic, houselessness).</p>	<p>Utilize partnerships to advance educational and career opportunities to develop, attract and retain Oregon’s tourism workforce.</p>
<p>Initial Key Milestones</p>	<p>Establish baselines: Resident Sentiment; Industry Workforce Sentiment; Policy Maker Sentiment.</p> <p>Determine target goals for each.</p> <p>Inventory current efforts to improve perception of the value of tourism and increase advocacy.</p> <p>Develop action plans to improve perception to meet target goals.</p>	<p>Create a collaborative process with industry partners and communities to research and align in their destination to reduce high visitation pressures.</p> <p>Invest in the development of niche tourism products that are based on growing visitor demand and Oregon’s competitive advantage.</p> <p>Engage with the industry and experts to identify specific interventions to address the destination’s situation/need.</p>	<p>Bring one voice to the agency and industry for crisis communications.</p> <p>Define and categorize long-term vs short-term crisis.</p> <p>Define Travel Oregon’s role in crisis.</p>	<p>Create an inventory of applicable tourism workforce programs.</p> <p>Relaunch Travel Oregon 101 program.</p> <p>Develop an Oregon-specific State Travel Counselor Program.</p>
<p>Measures of Success</p>	<p>A shared understanding by stakeholders of the value of tourism.</p>	<p>Improved resident and visitor sentiment.</p>	<p>Communities feel seen and supported in an equitable manner.</p>	<p>Travel Oregon is an industry leader in supporting living wage positions.</p>





Similar details, as captured with these four strategies, will be developed for the additional seven prioritized strategies. We anticipate this work to be conducted between July 1, 2023, and the September Commission meeting. These more detailed action plans for the additional seven prioritized strategies will help inform the budget modification to be included at said meeting. The seven additional strategies that teams will start working to develop milestones and measures of success for include:

- Expand opportunities for residents and tourism stakeholders to actively engage and collaborate in destination management processes; provide timely feedback loops.
- Align and support communications across the tourism industry to improve visitor behaviors and experiences with timely information, responsible recreation practices and respect for all communities.
- Work in tandem with stakeholders to create and implement a climate action plan in alignment with Executive Order 20-04 to reduce tourism industry carbon emissions.
- Partner with and support resource management agencies (tribal, local, state, federal) to sustain natural resources and mitigate visitor impacts on public and tribal land and waterways.
- Support the development of new and existing tourism-related facilities and products (e.g., visitor experiences, attractions, and public spaces) to better serve historically and currently underserved and under-resourced communities.

- Stimulate and bolster regenerative tourism business and product development opportunities, providing visitors with immersive Oregon experiences, particularly in rural communities and on tribal lands.
- Utilize partnerships to advance educational and career opportunities to develop, attract and retain Oregon's tourism workforce.



How We Determined 2023-2025 Strategies

Stakeholder Survey

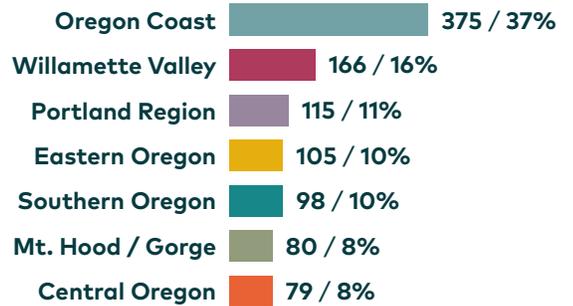
To ensure that biennial plans are built based on the most current information and represent the diversity of stakeholders across the state, creation of each two-year strategic plan will rely on data gathered through stakeholder surveys. These surveys allow us to hear directly from the industry and tourism-adjacent industries to help determine which strategies and programs to invest in that will ensure our work is supporting tourism in Oregon in the most impactful ways.

To inform the 2023-2025 strategic plan, we reviewed data from over 1,000 stakeholders to help determine funding and programmatic decisions in marketing, grants, tourism-related infrastructure, visitor management and more.

Considerations

In addition to aligning with insights from the stakeholder survey, we believe the strategies outlined above are critical to focus on in 2023-2025 for many reasons. In the prioritization process, we considered which of the 19 strategies in the [10-Year Strategic Vision](#) were foundational to future strategies. We believe these 12 strategies set us up for both near-term and long-term success. They will allow us to balance the needs of the industry and the communities we serve while having the greatest positive impact on the economy and diversity of people, cultures and environments in our great state. Prioritizing these 12 strategies now will help us build stronger partnerships with communities, organizations, decision-makers and the industry down the road while improving the perception of the value of tourism and creating opportunities for employee and industry growth and development in every region of the state. These strategies are also supported with passion and energy by Travel Oregon staff and the industry at large.

Stakeholder Survey Responses by Region



Areas of emphasis for tourism planning over the next 2 to 5 years in Oregon:



KEY PERFORMANCE INDICATORS

Key Performance Indicators

How We Will Measure Progress

No vision becomes a reality without the measurement of progress. In addition to our traditional economic impact indicators, we have developed key performance indicators, or KPIs, to monitor our progress toward the 10-Year Strategic Vision. Some of these KPIs are new and therefore initial information and baseline data will be used to show our progression and growth over the next 10 years. These KPIs, together with economic sustainability measures, align with the objectives and provide comprehensive, quantifiable measures of Oregon's statewide tourism performance and impacts.

We welcome our partners to use the same measurements, if desired, and are committed to supporting those who are interested in joining us on this journey.

Economic Prosperity - Estimates the annual economic impacts generated by tourism activities in areas of visitor spending, employment and tax revenue.

	2003	2019	2020	2021	2022	Change (2003-22)
Direct Employment	85,590 jobs	118,500	93,800	100,900	117,360	+37%
Employee Earnings	\$1.7 billion	\$3.8B	\$3.1B	\$3.4B	\$4.2B	+154%
Total Spending	\$6.5 billion	\$12.8B	\$6.5B	\$10.9B	\$13.9B	+113%
Taxes (State/Local)	\$242 million	\$597	\$405M	\$532M	\$643M	+166%

Source: Dean Runyan & Associates

Oregon Tourism Diversity - Measure and monitor the racial composition of Travel Oregon staff, Oregon tourism workforce and visitors. Records and monitors Travel Oregon's investment (funding and engagement) in supporting BIPOC businesses and communities.

From our initial baseline, we identified that the race/ethnicity of the tourism industry workforce and the race/ethnicity of Oregon visitors reflects the general demographics of Oregon. It is anticipated that state and national demographics will continue to shift over the biennium. We will continue to monitor these shifts, remeasure the race/ethnicity of the tourism industry workforce and Oregon visitor and adapt our strategies accordingly to ensure that our efforts stay aligned with demographic shifts.

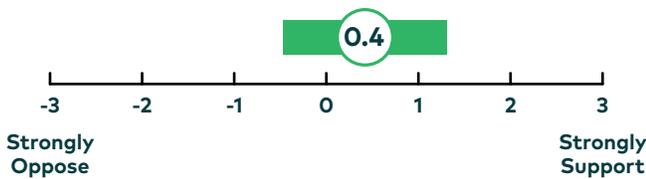


Top to bottom: Joni Kabana, Michael Hanson (2)

KEY PERFORMANCE INDICATORS

Oregon's Reputation - Measure and monitor resident and visitor sentiments about Oregon as a tourism destination biannually. Resident Sentiment measures perception of tourism impacts, both positive and negative, in the areas of sociocultural, economic and environmental, as well as support for tourism in the resident's community. Visitor Sentiment is measured through three standard customer loyalty metrics: a visitor satisfaction score that tells us how satisfied a visitor is traveling to, and within, Oregon; a "Net Promoter Score" that measures overall visitor satisfaction based on a visitor's willingness to recommend a destination to others; and an additional loyalty score that tells how likely visitors are to return to Oregon.

Overall Support for Tourism Development: RESIDENT



Source: Oregon Resident Sentiment

Net Promoter Score: OUT-OF-STATE VISITOR



Source: Oregon Visitor Profile

Environmental Sustainability - Records and monitors Travel Oregon's investment (funding and engagement) in supporting Oregon's greenhouse gas reduction goals and its impact in two areas: developing and promoting regenerative tourism products and experiences; and empowering the tourism industry and visitors to take steps to reduce their carbon emissions and adopt regenerative tourism practices. Over the next biennium, our focus will be to ensure our measure aligns with the Governor's Executive order [no. EO20-04](#), to establish a progress goal and an initial baseline.

Conclusion

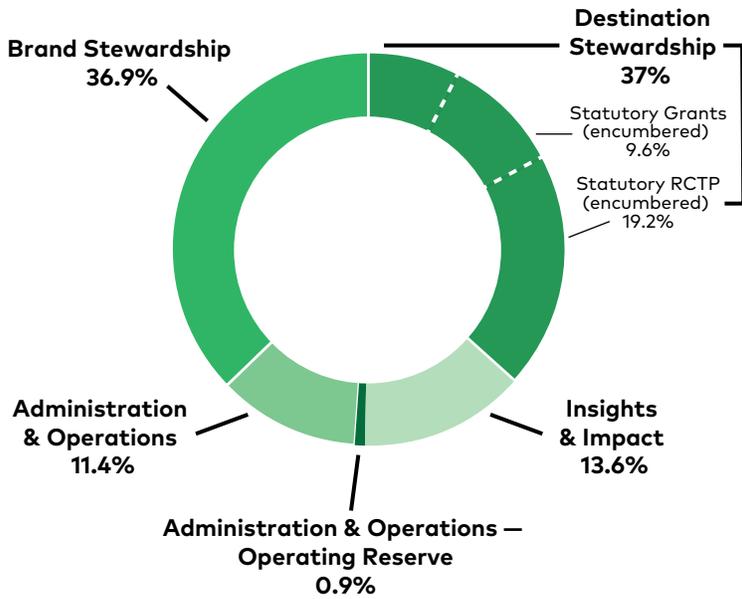
Since the adoption of the 10-Year Strategic Vision in 2022, we continue to make significant progress. We've filled several key staff roles that will enable our objectives and strategies, passed a budget amendment to fuel our priorities, enhanced communication channels, created new organizational policies and restructured Travel Oregon teams to align with, and support, the strategic vision.

At its core, the 2023-2025 biennial plan is both an industry and an agency plan. It maps Travel Oregon's work and will serve the industry as a near-term guide nestled within—and driving toward—a shared, long-term vision. This biennial strategic plan, along with the greater 10-Year Strategic Vision, were both created to serve you, our industry, as we learn together how to build a stronger, resilient Oregon economy.

The positive potential for Oregon is significant. The greatest success is possible when we all move together. We look forward to having you join us on this journey.



2023-2025 Proposed Budget*



* Percents shown are of all sources of revenue and income.

Transient Lodging Tax	91,400,000
Transient Lodging Tax from FY2023	1,750,000
Other Income	2,246,500
Total	95,396,500

Program budgets:

Brand Stewardship	35,243,600
Destination Stewardship	35,298,200
Competitive Grants** (10% encumbered - 9,140,000)	
RCTP** (20% encumbered - 18,280,000)	
Insights and Impact	13,019,200
Administration & Operations	10,922,300
Administration & Operations – Operating Reserve	913,200
Total	95,396,500

** Percents shown are statutory requirements applied to TLT forecasted for 23-25 biennium

OUTCOME BASED BUDGETING – 10-YEAR STRATEGIC VISION OBJECTIVE

Oregon’s tourism economy is flourishing.	9,203,000
Oregon is striving to be a place of equity.	9,215,000
Oregon delivers remarkable experiences.	9,525,000
Oregon respects its natural environments.	7,743,300
Total	35,686,300



STATE OF OREGON



Oregon Governor
Tina Kotek

OREGON TOURISM COMMISSION



Chair
Richard Boyles



Vice Chair
Lucinda DiNovo



David
Gremmels



David
Penilton



Maria
Ponzi



Mia
Sheppard



Erin
Stephenson



Greg
Willitts

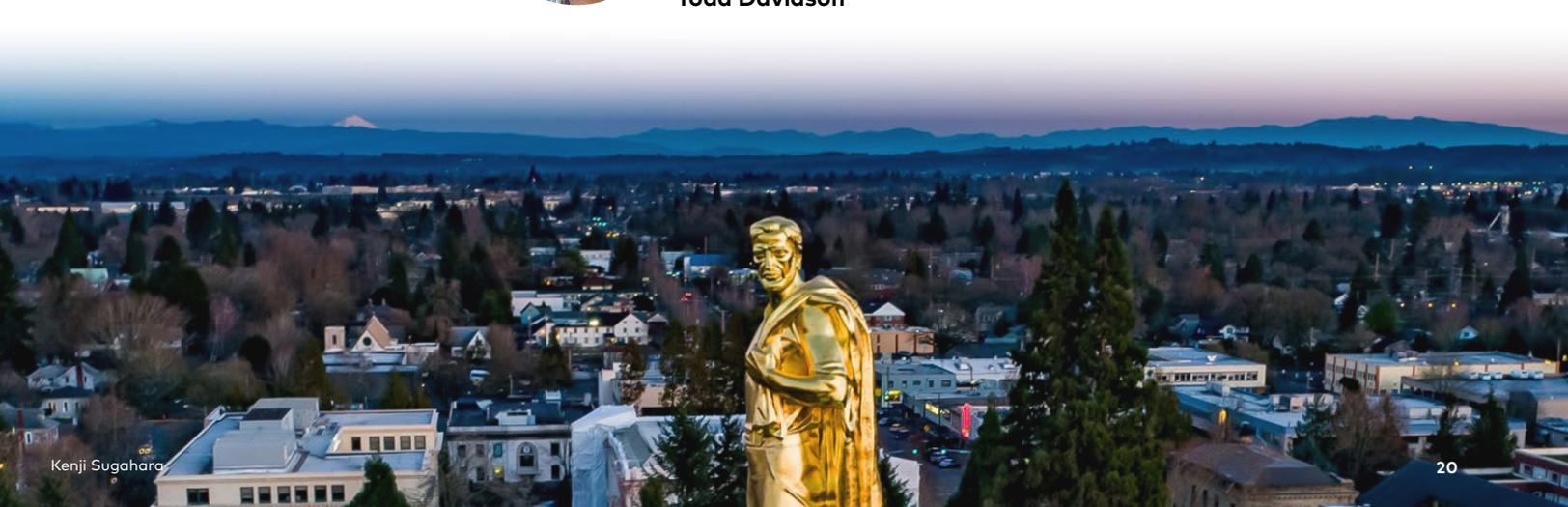


Scott
Youngblood

TRAVEL OREGON



Chief Executive Officer
Todd Davidson





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industry.traveloregon.com