



TRAVEL



OREGON

STRATEGIC VISION KPIs
Sept 2024 Commission Briefing

9.24.24

STRATEGIC VISION KPIs PROGRESS UPDATE



STRATEGIC VISION

KPI PAGE

KPIs -VS- GOALS

KEY PERFORMANCE INDICATORS

No vision becomes a reality without measuring its progress. In addition to our traditional economic impact indicators, we have developed new KPIs to monitor our progress against the 10-year strategic vision. These KPIs, together with economic sustainability measures, align with the objectives and provide comprehensive, quantifiable measures of Oregon's statewide tourism performance and impacts.

Economic Prosperity

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

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-owned businesses and communities.

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. The first metric is a visitor satisfaction score which will be used to

gauge how satisfied a visitor is with a particular interaction or overall experience when traveling to and within Oregon. The second loyalty metric is a "Net Promoter Score." The Net Promoter Score gauges overall visitor satisfaction and loyalty based on a visitor's willingness to recommend a destination to others. The third loyalty metric measures the likelihood of travelling to and within Oregon in the future.

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.
- Empowering the tourism industry and visitors to take steps to reduce their carbon emissions and adopt regenerative tourism practices.

These KPIs represent overall Travel Oregon indicators and will be available to the industry. Specific goals will be developed and included in biennial plans. While there is no expectation for partners to use the same measurements, we are committed to supporting those who are interested in joining us on this journey.

STRATEGIC VISION KPI BUCKETS

1. Economic Prosperity
2. Oregon Tourism Diversity
3. Oregon's Reputation
4. Environmental Sustainability



KEY PERFORMANCE INDICATORS

We have developed new Key Performance Indicators (KPIs) to monitor our progress against the 10-year strategic vision.

» Economic Prosperity

» Oregon Tourism Diversity

» Oregon's Reputation

» Environmental Sustainability

ECONOMIC PROSPERITY

ECONOMIC PROSPERITY



Baseline Set

DEFINITION: Key Economic Impact indicators

- Visitor Spending 2023:
 - \$14.0 Billion, 1% YOY Growth
- Employment 2023:
 - 118,500 Jobs, 2% YOY Growth
- Tax Revenue 2023:
 - \$1.5 Billion, 3% YOY Growth

ECONOMIC PROSPERITY

2023 TRAVEL SPENDING



Baseline Set

Travel Spending Trend



2023: \$14.0 Billion
↑ 0.6% YOY

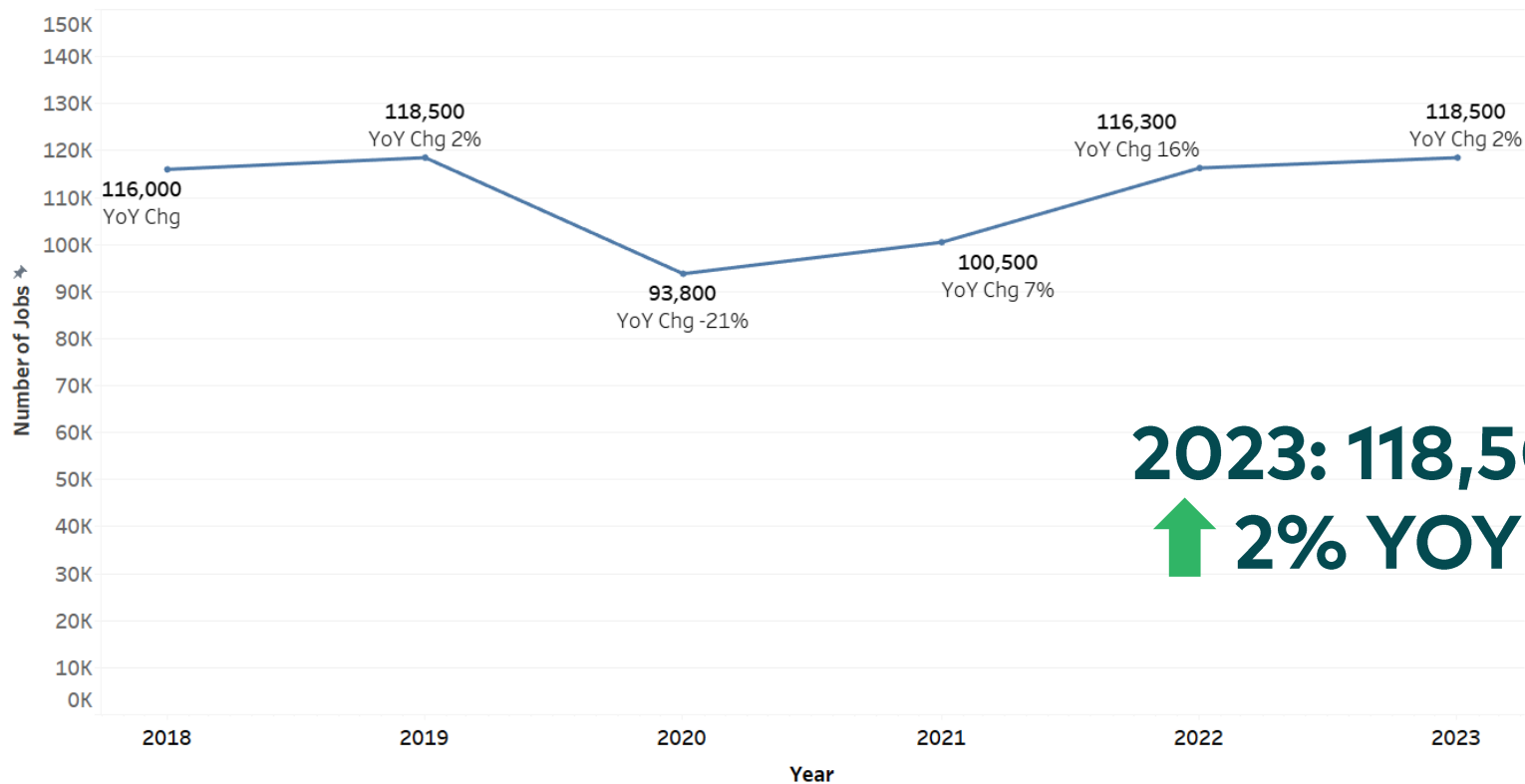
ECONOMIC PROSPERITY

2023 TOURISM JOBS



Baseline Set

Tourism Jobs



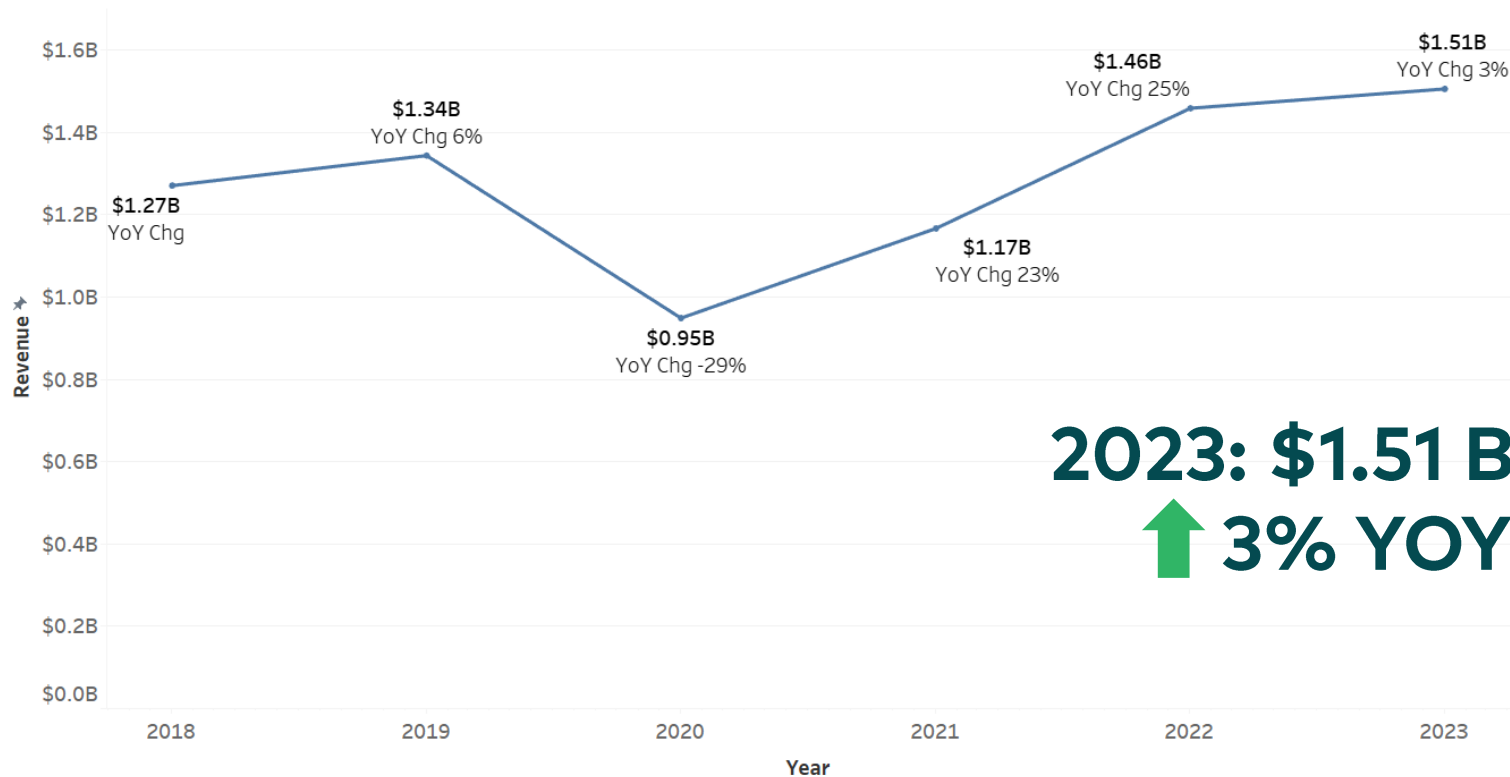
ECONOMIC PROSPERITY

2023 TOTAL TAX REVENUE



Baseline Set

Tax Revenue



2023: \$1.51 Billion
↑ 3% YOY

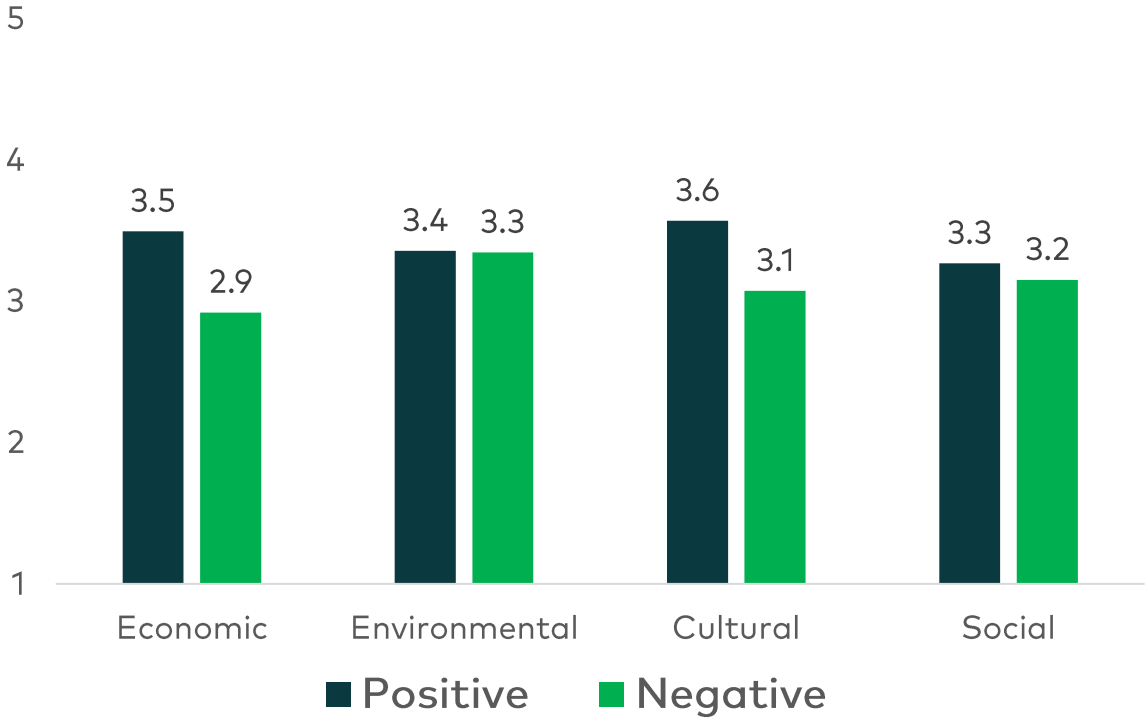
OREGON'S REPUTATION

RESIDENT SENTIMENT 2024



Baseline Set

Residents' Perceptions of Tourism Impacts



Overall Support for Tourism Development

0.9

2024 RESIDENT SENTIMENT



Baseline Set



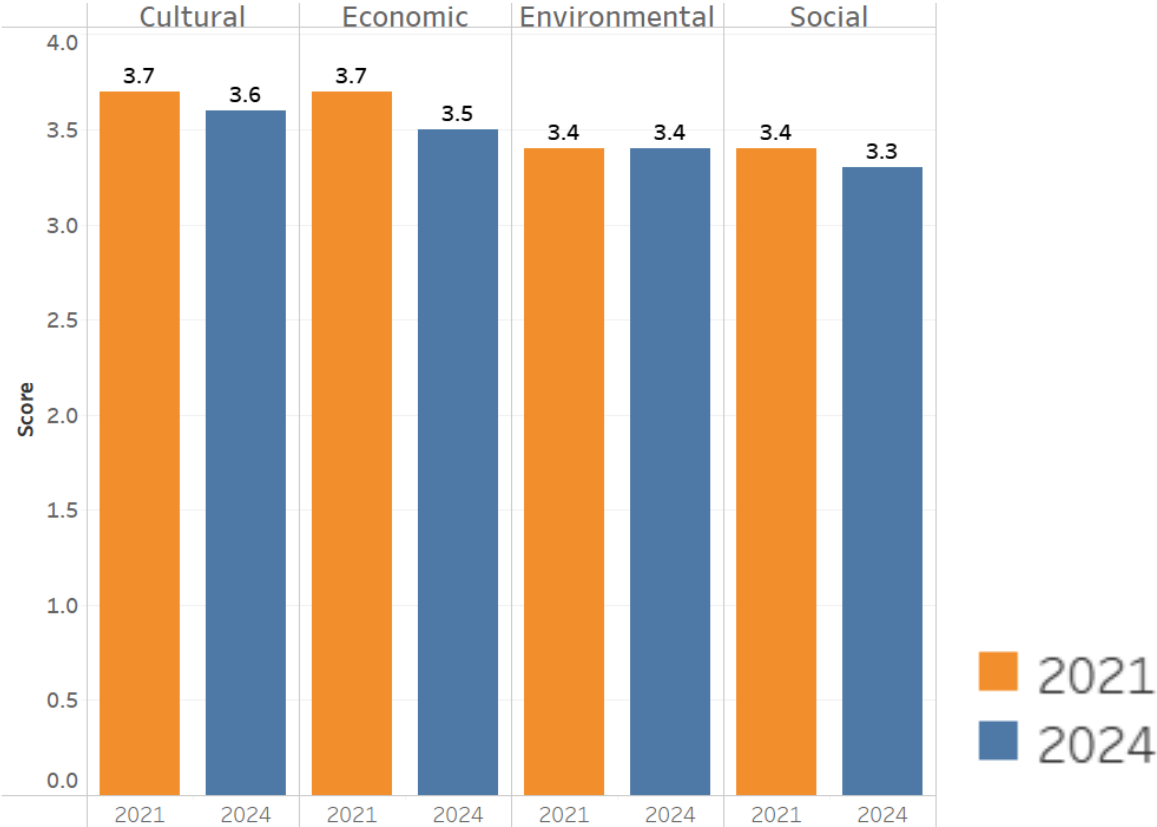
SOURCE: 2024 Travel Oregon Resident Sentiment

YOY RESIDENT SENTIMENT

POSITIVE PERCEPTIONS



Baseline Set

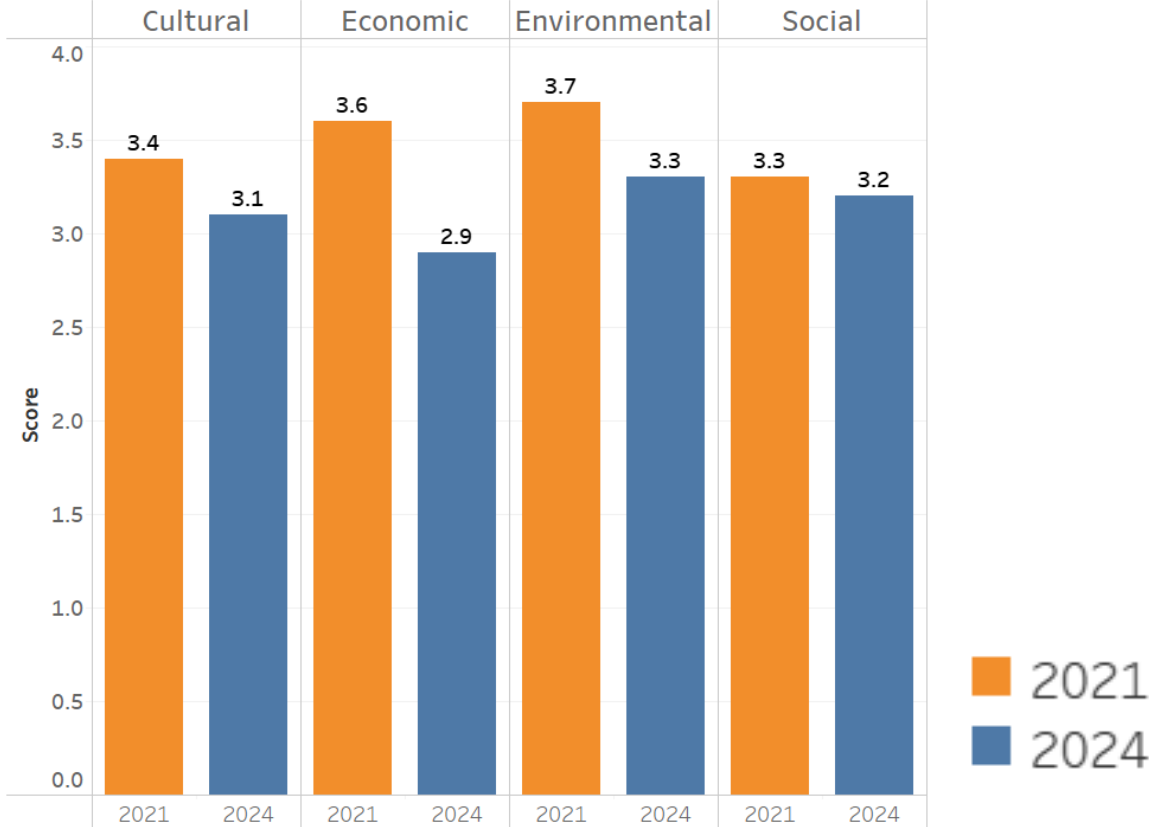


YOY RESIDENT SENTIMENT

NEGATIVE PERCEPTIONS



Baseline Set

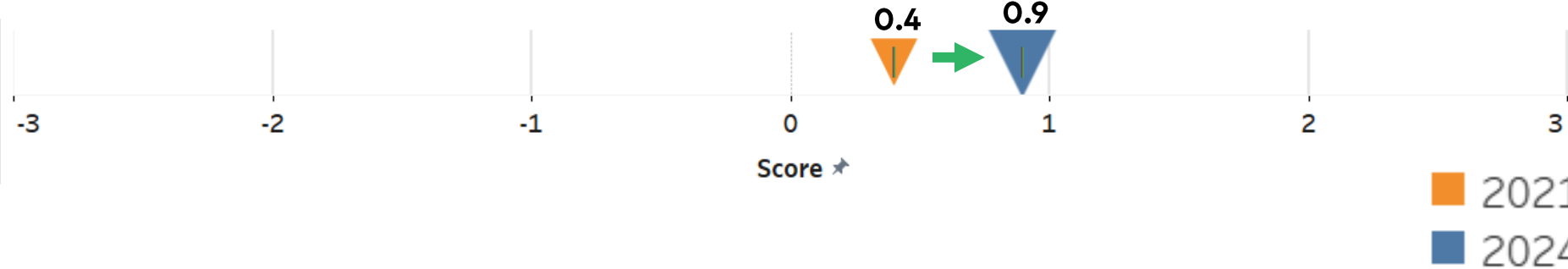


YOY RESIDENT SENTIMENT

SUPPORT FOR TOURISM DEV.



Baseline Set





KEY VISITOR PERCEPTIONS



Baseline Set

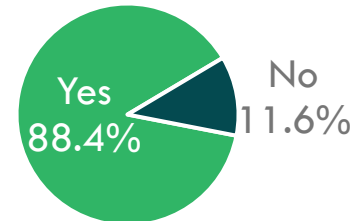


Overall Trip Satisfaction:
94.7%

Net Promoter Score

44

Likelihood to Return
Next 12 Months



SOURCE: 2022 Travel Oregon Visitor Profile

OREGON TOURISM DIVERSITY

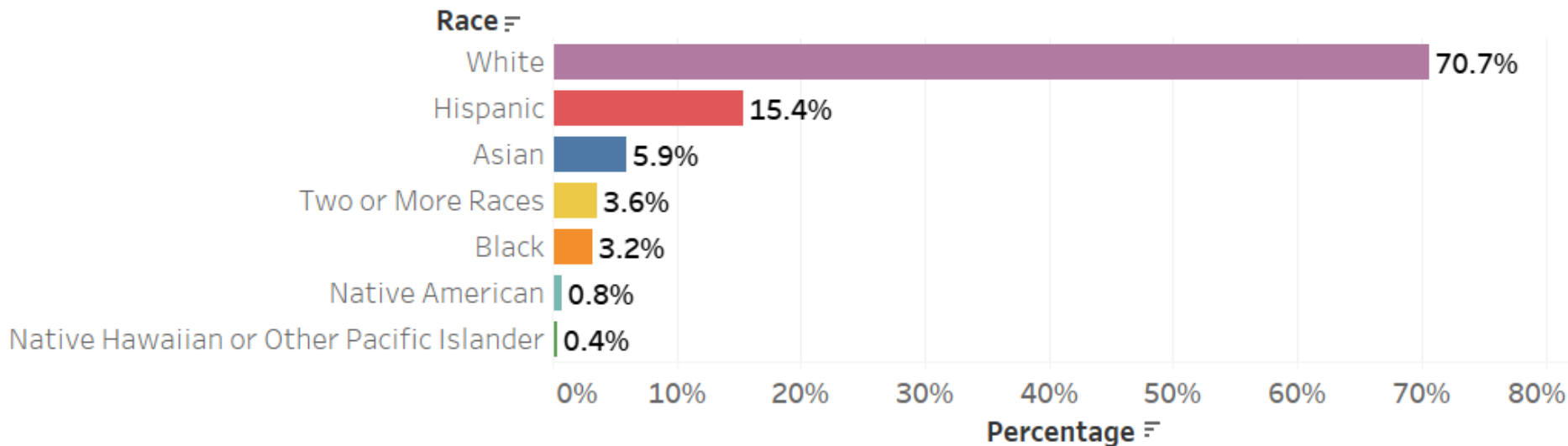
OREGON'S TOURISM DIVERSITY

2023 TOURISM WORKFORCE



Baseline Set

KPI: Racial composition of the Oregon tourism workforce



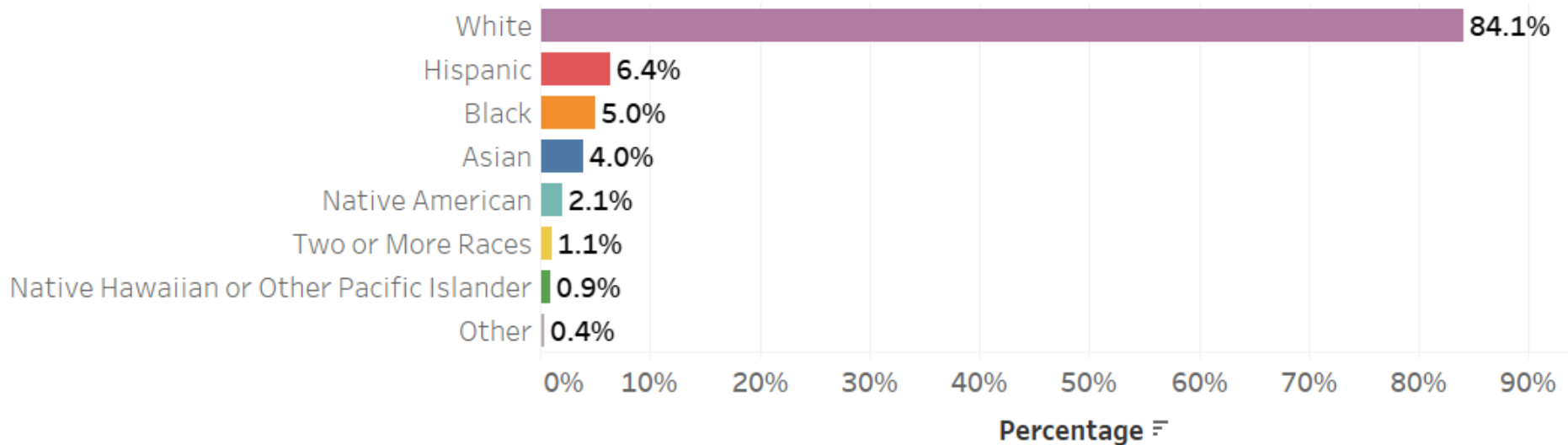
OREGON'S TOURISM DIVERSITY

2023 OREGON VISITORS



Baseline Set

KPI: Racial composition of the Oregon visitors



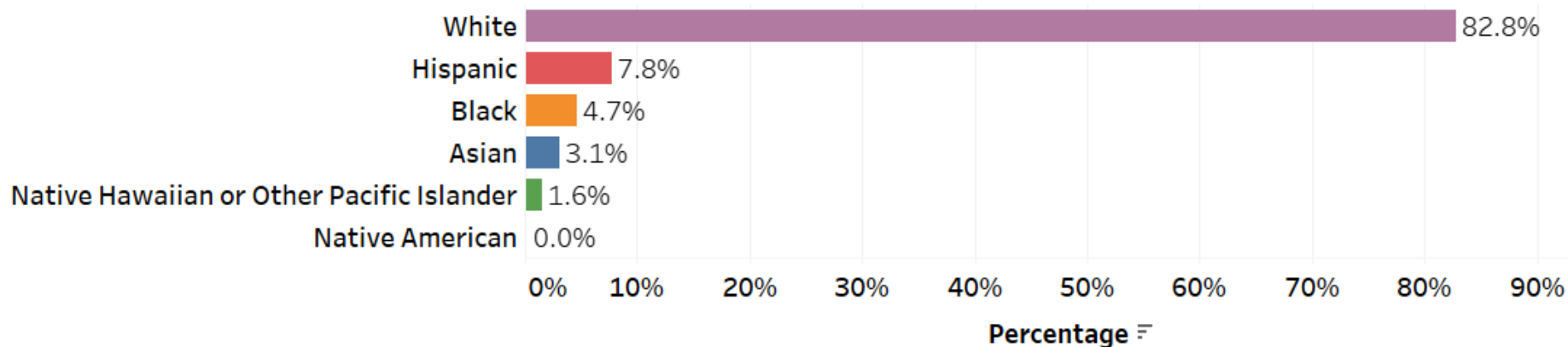
OREGON'S TOURISM DIVERSITY

SEPTEMBER 2024 STAFF

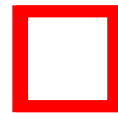


Baseline Set

KPI: Racial composition of the Travel Oregon staff



OREGON'S TOURISM DIVERSITY UNDERSERVED & UNDER-RESOURCED



Baseline Set

DEFINITION: Travel Oregon's investment (funding and engagement) in supporting BIPOC-Owned businesses and communities.

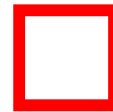
STATUS: In Progress

GOAL: TBD

ENVIRONMENTAL SUSTAINABILITY

STRATEGIC VISION KPI:

ENVIRONMENTAL SUSTAINABILITY



Baseline Set

DEFINITION: Travel Oregon's investment (*funding and engagement*) in supporting Oregon's greenhouse gas reduction goals.

STATUS: To be developed

GOAL: TBD

STRATEGIC VISION KPI: ENVIRONMENTAL SUSTAINABILITY



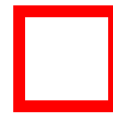
Baseline Set

DEFINITION: Records and monitors *development* and *promotion* of regenerative tourism products and experiences

STATUS: To be developed

GOAL: TBD

STRATEGIC VISION KPI: ENVIRONMENTAL SUSTAINABILITY



Baseline Set

DEFINITION: Records and monitors empowerment of tourism industry to take steps to reduce their carbon emissions and adopt regenerative tourism practices

STATUS: To be developed

GOAL: TBD

STRATEGIC VISION KPI: **ENVIRONMENTAL SUSTAINABILITY**



Baseline Set

DEFINITION: Records and monitors empowerment of visitors to take steps to reduce their carbon emissions and adopt regenerative tourism practices

STATUS: To be developed

GOAL: TBD

NEXT STEPS

KPI GOALS

- For the KPIs that have baselines, we will be working to establish appropriate goals.
- We aim to have them ready for review by end of January 2025.



STRATEGIC VISION DASHBOARD

- Establishing a 10-Year Strategic Vision dashboard will be key to monitoring progress.
- Drafts of the dashboard are underway



INDUSTRY PARTNER SURVEY

- Take the survey
- Open till ~Oct 10th



THANK YOU