

OREGON TOURISM COMMISSION BRIEFING

Sept. 24, 2024

Inn at Cross Keys Station
66 NW Cedar Street
Madras, OR 97741

Tourism Commissioners present included: Chair Lucinda DiNovo, Vice Chair Greg Willitts and Commissioners Travis Hill, Harish Patel, David Penilton, Jenifer Roe, David Gremmels and Scott Youngblood. Commissioner Erin Stephenson was not able to attend.

Welcome and Introductions

Chair DiNovo opens the meeting at 12:03 p.m. and welcomes everyone to the September 24, 2024, Oregon Tourism Commission briefing.

Chair DiNovo thanks everyone for being in Madras, noting that today's meeting materials, including the agenda and supplemental material can be found on the Travel Oregon Industry website.

Chair DiNovo states that in holding a meeting, all Public Meeting notice requirements required by state law were met. This included the notice of an Executive Session which will be held later today. Per statute ORS 192.660 (2) (d), the meeting will be held for the purpose of reviewing and evaluating the employment-related performance of the chief executive officer, specifically the CEO Evaluation, of any public body, a public officer, employee or staff member who does not request an open hearing.

The Oregon Tourism Commissioners and Todd Davidson, CEO of Travel Oregon, introduce themselves.

Chair DiNovo shares her appreciation of being on the ancestral homelands of the Confederated Tribes of Warm Springs and the opportunity to visit Kah-Nee-Ta Hot Springs Resort this evening for dinner.

Chair DiNovo states that the briefing provides us with some extended time to hear from and engage with staff regarding topics that have been a focus area for Travel Oregon and Oregon's tourism industry.

Todd walks the Commission through the briefing agenda.

Todd welcomes the first speaker, Michael Sturdevant, Brand Stewardship Strategist, to present an update on Travel Oregon's target audience.



Target Audience Update

Michael walks the Commission through a PowerPoint presentation regarding an update to Travel Oregon's Target Audience (Exhibit A):

- Identifying a Target Audience
- Updating the Travel Oregon target – Why a change is being made
 - Changing from "Active Adventurer" to "Immersive Guest"
- Identifying a Target Audience – The Process
- Identifying a Target Audience – Support the 10-Year Strategic Vision
- Identifying a Target Audience – Map Consumer Insights to MRI-Measured
- Identifying a Target Audience – Key Experience Pillars
- Identifying a Target Audience – Map Consumer Insights to MRI-Measured
- Identifying a Target Audience – Target Audience Definition
- Identifying a Target Audience – Target Audience Size (National)
- Identifying a Target Audience – Immersive Guests Key Considerations
- Target Audience – Identifying Media Channels

Michael states that he will be producing an updated white paper detailing the target audience and expects to have it done in October.

Todd thanks Michael for his presentation and asks if there are any questions.

Commissioner Patel asks about the gap between male and female travelers and if it has always been like that. Michael states that our visitors skew toward female and states that it might be due to that women are more likely to make travel decisions in a family.

Commissioner Youngblood thanks Michael for the presentation and appreciates that the target age was extended.

Commissioner Hill asks if Michael had any 'aha' moments as he reviewed the data compared to the active adventurer data. Michael states that a similar process was done for identifying the active adventurer, but now with MRI Simons database, we can know if we successfully acted on delivering that traveler to Oregon. Michael continues that Oregon is neck and neck along with New York in being able to successfully deliver the immersive guest to the state.

Commissioner Penilton asks if there is any difference between short and long-haul travelers and if the immersive guest has a tendency to return to the state. Michael states that this data refers to domestic travelers only.

Todd states that more information will be shared in the next presentation regarding domestic travelers.

Chair DiNovo thanks all presenters for sharing the information in advance.

Todd welcomes the next presenters, Katy Clair, Brand Services Director, and Wade McCarthy, Paid Media Manager, to share their Marketing Campaign Update.

Marketing Campaign Update

Katy and Wade walk the Commission through a PowerPoint presentation regarding an update to the Marketing Campaign (Exhibit B).

- Katy introduces Wade as the new full time Paid Media Manager
- Marketing Objectives from the 10-Year Strategic Vision
- Campaign Results
- Marketing Results
- The Theme for the year
- Theme of the year and how each season has a focus
- Strategic POV: Portland has the guts to go for it
- Fresh narratives on Portland and inviting people to come to Portland
- 15 second videos are shown featuring Portland creative
- Media Goals
- Primary/Opportunity/Test Market Approach
- FY24 Travel Oregon with Travel Oregon Campaign Landing Page by City
- Over/Under Exposures by Arrival (Arrivalist)
- Adding More Data Sources – Arrivalist & Dean Runyan Data
- Starting with the Audience – How familiar is the audience with Oregon?
- Quantifying Familiarity – Trips per capita
- Layer in Target Audience – Immersive Guest
- Creating Regional Zones – Market Buckets
- New Market Map – New Awareness Approach
- FY25 Awareness Marketing Map – Balance Reach and Frequency
- Gravity on Regional Zones – City/DMA Spends
- How About Search? The other end of the marketing funnel
- Platform Audience – Search = Intent
- National Search Approach – Balancing Search Competition
- FY25 Search Budgets – Flattening the Curve
- Platform Tactics – Lean into platform capabilities and audiences
- Travel Oregon with Travel Oregon season focuses

Chair DiNovo acknowledges staff's ability to pivot the spending of marketing dollars more intelligently and expects to utilize Wade's data expertise to update the Commission more often in.

Chair DiNovo asks how campaign website sessions compare to 2022 when the campaign ran around the World Athletics Championships Oregon22.



Katy states that there are difficulties in comparing campaign website sessions but there were about one million more sessions this year due to paid media efforts. Organic search continues to be the largest driver to TravelOregon.com but it is also constantly adjusted with various levers or tactics. Always-on marketing campaigns allow tactic changes.

Chair DiNovo states that her employer compares marketing data to 2019 and asks if Travel Oregon is doing the same.

Katy states that we are not doing that but we can share more information. An emailed response will be provided to all Commissioners.

Vice Chair Willitts asks if the immersive guest segment is smaller or larger compared to the active adventurer and if it is more costly. Katy and Wade will provide follow up to the Commissioners.

Vice Chair Willitts thanks the presenters for the ability to level up search results to the RDMO to provide a more economical search result.

Vice Chair Willitts acknowledges 'wildfire season' and how it impacts marketing. Unfortunately, smoke impacts were more acute in the La Pine and Sunriver areas that moved visitors further north.

Commissioner Penilton thanks Katy and Wade for their presentation and welcomes Wade to the team. Commissioner Penilton asks if there is a way to show how tourism investment efforts in Portland impact the rest of the state. Katy will provide follow up regarding why the Portland work is important to the rest of the state.

Commissioner Gremmels thanks the presenters and acknowledges the favorable economic returns on spend. Commissioner Gremmels echoes Commissioner Penilton's thoughts about how Portland data can be shown in supporting the rest of the state.

Commissioner Patel acknowledges the economic returns and asks how the statistics are defined. Katy responds that the \$130:1 return on ad spend comes from online travel agency partners providing data on hotel spend. Katy states that their goal is to optimize rather than maximize.

Commissioner Gremmels appreciates the use of optimization.

Commissioner Youngblood asks for an example that generates return on ad spend. Wade responds that ads go into the Expedia ecosystem and then go through a conversion path that generates return on ad spend.

Commissioner Patel acknowledges that many hotel owners do not like online travel agencies due to their expense. Katy states that there are multiple layers to marketing tactics but appreciates the feedback to ensure it fits for the industry.

Todd thanks Katy and Wade for their presentation.

Mt. Hood & Columbia River Gorge RCTP and OWCLPTPP RFP Process

Todd welcomes Harry Dalgaard, Regional Services Director, and Kevney Dugan, Vice President of Destination Stewardship, to share the Mt. Hood and Columbia River Gorge Regional Cooperative Tourism Program (RCTP) and Oregon Wine Country License Plate Tourism Promotion Program (OWCLPTPP) RFP committee designation recommendation.

Harry and Kevney walk the Commission through the PowerPoint regarding the RFP process (Exhibit C):

- RFP review process
- Additional review
 - In depth reference checks
 - Organizational budget analysis
 - Additional interview with applicants
 - Evaluation committee review
- Scoring for Columbia Gorge Tourism Alliance – 18.9
- Scoring for Clackamas County Tourism dba Experience Mt. Hood and the Gorge – 22.6
- Review Committee recommendation is to award Clackamas County Tourism both the RCTP and OWCLPTPP – an 8-year designation comprised of (4) 2-year contracts, conditional on midpoint review by the Oregon Tourism Commission.
- Review committee recommendation
 - Considerations for Clackamas County recommendation

Todd states that tomorrow's vote will be to approve the recommendations as outlined today. Todd asks if there are any questions.

Commissioner Penilton shares his appreciation for the presenters and the RFP review committee.

Chair DiNovo states that it was a privilege to serve on the committee and appreciates those who served on the committee. Chair DiNovo especially applauds Scott Bricker of Travel Oregon for his ability to ask poignant questions during the RFP process.

Vice Chair Willitts shares his appreciation for the process and hopes that both organizations continue to work together for the betterment of the region.

Strategic Vision KPIs

Todd asks Bryan Mullaney, Director of Strategy, Research and Analytics to share his presentation on Strategic Vision KPIs.

Bryan walks the Commissioners through a PowerPoint presentation regarding the 10-Year Strategic Vision KPIs (Exhibit D):

- Strategic Vision KPIs Progress Update
- Strategic Vision KPI page – difference between KPIs and goals
- Strategic Vision KPI Buckets
 - Economic Prosperity
 - Oregon Tourism Diversity
 - Oregon's Reputation
 - Environmental Sustainability
- Economic Prosperity
- Economic Prosperity – 2023 Travel Spending
- Economic Prosperity - 2023 Tourism Jobs
- Economic Prosperity - 2023 Total Tax Revenue
- Resident Sentiment 2024
- Year Over Year Resident Sentiment Positive Perceptions
- Year Over Year Resident Sentiment Negative Perceptions
- Year Over Year Resident Sentiment - Support for Tourism Development
- Key Visitor Perceptions
- Oregon Tourism Diversity - 2023 Tourism Workforce
- Oregon Tourism Diversity - 2023 Oregon Visitors
- Oregon's Tourism Diversity - September 2024 Travel Oregon Staff
- Oregon's Tourism Diversity - Underserved and Under-Resourced Communities
- Environmental Sustainability
- Strategic Vision KPIs: Environmental Sustainability
- Next Steps
 - Setting KPIs and goals
 - Strategic Vision Dashboard
 - Industry Partner Survey

Commissioner Youngblood asks for clarification regarding the resident sentiment slide. Bryan states that both positive and negative sentiments can decrease because they are from different sets of questions.

Commissioner Youngblood asks about the Net Promoter Score (NPS) and what the scale is. Bryan states the scale goes from -100 to 100 so anything positive is good in that the visitor is promoting their satisfaction with their trip to Oregon. Commissioner

Youngblood asks if a graph is available to visualize the NPS. Bryan states the upcoming dashboard will include this.

Chair DiNovo asks if the remaining eight KPI baselines will be completed before approving the 2025-27 biennial plan. Bryan states that there is difficulty in the environmental sustainability KPIs but the team is looking at models from other DMOs, like in British Columbia. Todd states more work needs to be done to revise some wording so that KPIs can be measured. Those changes will be presented to the Commission at a future meeting.

Commissioner Patel asks about environmental sustainability and how Travel Oregon can measure their impact/carbon footprint. Bryan states that more work is needed to define the environmental sustainability KPIs.

Commissioner Penilton asks if establishing KPI baselines can be done prior to the next fiscal year. Todd acknowledges the urgency.

Bryan asks for all to participate in the industry partner survey as the results directly contribute to the next biennial strategic plan. Commissioner Penilton asks how respondents are filtering in. Bryan states that the goal is to have 100 samples per region and are currently pleased with the number of responses received but always welcome more.

Commissioner Roe states that she has completed her survey and asks if respondent results can be shared by zip code. Bryan answers affirmatively. Commissioner Roe states she is interested in comparing rural and urban answers.

Commissioner Gremmels thanks Bryan for the presentation and asks if there is a possibility to work with the Governor's Sustainable board to collaborate on setting baselines. Bryan thanks Commissioner Gremmels and states that the Governor's Office definitions have been used for the underserved and under resourced definitions.

Commissioner Youngblood states that he re-shared the industry partner survey via LinkedIn and asks all Commissioners to do the same.

Chair DiNovo asks if there is any additional business.

Vice Chair Willitts states that he took inspiration from Travel Oregon marketing and recently spent time in southeastern Oregon.

Chair DiNovo states that Commissioner Hill also recently took inspiration and visited Mt. Angel's Oktoberfest festival.

Chair DiNovo thanks everyone for their time today and looks forward to the opportunity to dine with local leaders and tourism partners starting at 6:30 p.m. at Kah-Nee-Ta Hot Springs Resort.

Chair DiNovo states the Oregon Tourism Commission will be Wednesday, September 25, held at the Inn at Cross Keys Station starting at 9:00am.

Chair DiNovo adjourns the meeting at 2:13 p.m.