



TRAVEL



OREGON

STRATEGIC VISION KPIs
Feb '25 – Commission Meeting

2.24.25

Traveloregon.com

STRATEGIC VISION KPIs PROGRESS UPDATE

STRATEGIC VISION

KPI BUCKETS SHIFTS

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



1. Oregon's Tourism **Economy** is Flourishing
2. Oregon is Striving to be a Place of **Equity**
3. Oregon Delivers Remarkable **Experiences**
4. Oregon Respects its Natural **Environment**

LANGUAGE SHIFTS STRATEGIES

Develop Racial Equity Plan with Oregon partners

- Work in collaboration with industry **partners** to develop and implement a racial equity plan incorporating the strategies from the State of Oregon DEI Action Plan

Support Welcoming Destinations by Engaging Industry Partners

- Engage with industry **partners** to apply the racial equity lens — supporting welcoming destinations and helping reduce impacts of racial inequities.

Implement a Tourism Climate Action Plan

- Work in tandem with **partners** to create and implement a climate action plan in alignment with Executive Order 20-04 to reduce tourism industry carbon emissions.

LANGUAGE SHIFTS STRATEGIES

Elevate the Voices of Underserved Communities

- Foster deep relationships with and elevate the voices of historically and currently underserved and under-resourced communities, ~~including BIPOC, tribes, and LGBTQIA+ communities~~



Credit: traveloregon.com

KPI SHIFTS

EQUITY KPIs

Oregon is Striving to be a Place of Equity KPIs

- Measure and monitor racial composition of Travel Oregon staff
- Measure and monitor racial composition of Oregon tourism workforce
- Measure and monitor racial composition of visitors to or within Oregon



Credit: traveloregon.com

KPI SHIFTS

ENVIRONMENT KPIs

Oregon Respect its Natural Environments KPIs

- Records and monitors Travel Oregon's greenhouse gas emissions
- Records and monitors investment (**funding**) in supporting the development and promotion of sustainable and regenerative tourism.
- Records and monitors investment (**engagement**) in supporting the development and promotion of sustainable and regenerative tourism.
- Records and monitors the steps taken by Oregon's **tourism industry's** to reduce their greenhouse gas emissions and adopt sustainable and regenerative tourism practices
- Record and monitors the steps taken by **visitors** to reduce their greenhouse gas emissions and adopt sustainable and regenerative tourism practices

PROGRESS TO DATE

BASELINING

Oregon's Tourism Economy is Flourishing

- 1. Visitor Spending**
- 2. Tourism Employment**
- 3. Tax Revenue**

Oregon Delivers Remarkable Experiences

- 1. Resident Social Perception**
- 2. Resident Cultural Perception**
- 3. Resident Economic Perception**
- 4. Resident Environmental Perception**
- 5. Resident Support for Tourism**
- 6. Visitor Satisfaction**
- 7. Visitor Net Promoter Score**
- 8. Visitor Likelihood to Return Score**

PROGRESS TO DATE

NEW BASELINES

Oregon is Striving to be a Place of Equity

1. Funding for underserved communities
2. Engagement with underserved communities

Oregon Respects in Natural Environments

1. Funding for sustainable and regenerative tourism
2. Engagement supporting sustainable and regenerative tourism
3. Visitors reducing greenhouse gas emissions and adopting sustainable and regenerative tourism

PROGRESS TO DATE
GOALS

Annual Visitor Spending
Tourism Employment
Tourism Tax Revenue
Funding Underserved & Under-Resourced
Engagement Underserved & Under-Resourced
Resident Social Perception
Resident Cultural Perception
Resident Economic Perception
Resident Environmental Perception
Resident Support for Tourism
Visitor Satisfaction
Visitor Net Promoter Score
Visitor Likelihood to Return Score
Travel Oregon’s Greenhouse Gas Emissions

13 of 18
KPIs have
goals set

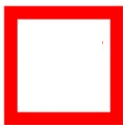
**OREGON IS STRIVING TO
BE A PLACE OF EQUITY**

EQUITY



Baseline Set

DEFINITION: Record and monitors Travel Oregon's investment (funding and engagement) in supporting underserved and under-resourced communities



Goal Set

KPI	Baseline (FY23-24)	Goal
Record and monitors Travel Oregon’s investment (<u>funding</u>) in supporting underserved and under-resourced communities	\$5.2 million*	TBD
Record and monitors Travel Oregon’s investment (<u>engagement</u>) in supporting underserved and under-resourced communities	472 hours*	TBD

*Conservative estimate based on available data

**OREGON'S TOURISM
ECONOMY IS
FLOURISHING**

ECONOMY



Baseline Set

DEFINITION: Key Economic Impact indicators



Goal Set

KPI	Baseline	Goal
Visitor Spending	\$14.1 Billion*	\$17.2 Billion 23% growth from 2022
Tourism Employment	119,600 Jobs*	133,300 jobs 15% growth from 2022
Tax Revenue	\$1.5 Billion^	\$2.0 Billion 38% growth from 2022

*Baselines from CY2024

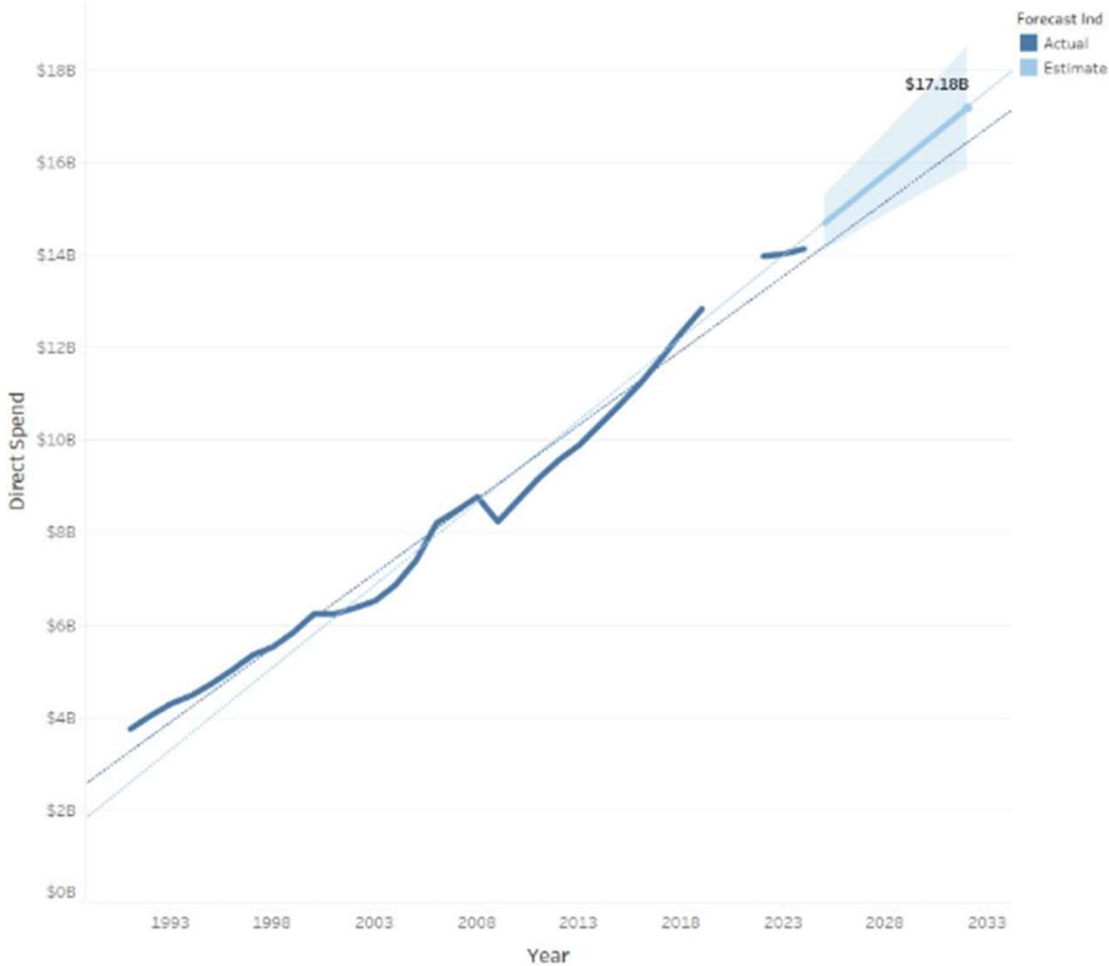
^Baseline from CY2023

ECONOMY

VISITOR SPENDING

GOAL: \$17.18 Billion
23% growth from 2022

(Billions)	2024	...	2031	2032
Upside	\$14.13	...	\$18.23	\$18.04
Baseline	\$14.13	...	\$17.36	\$17.18
Downside	\$14.13	...	\$16.49	\$16.32

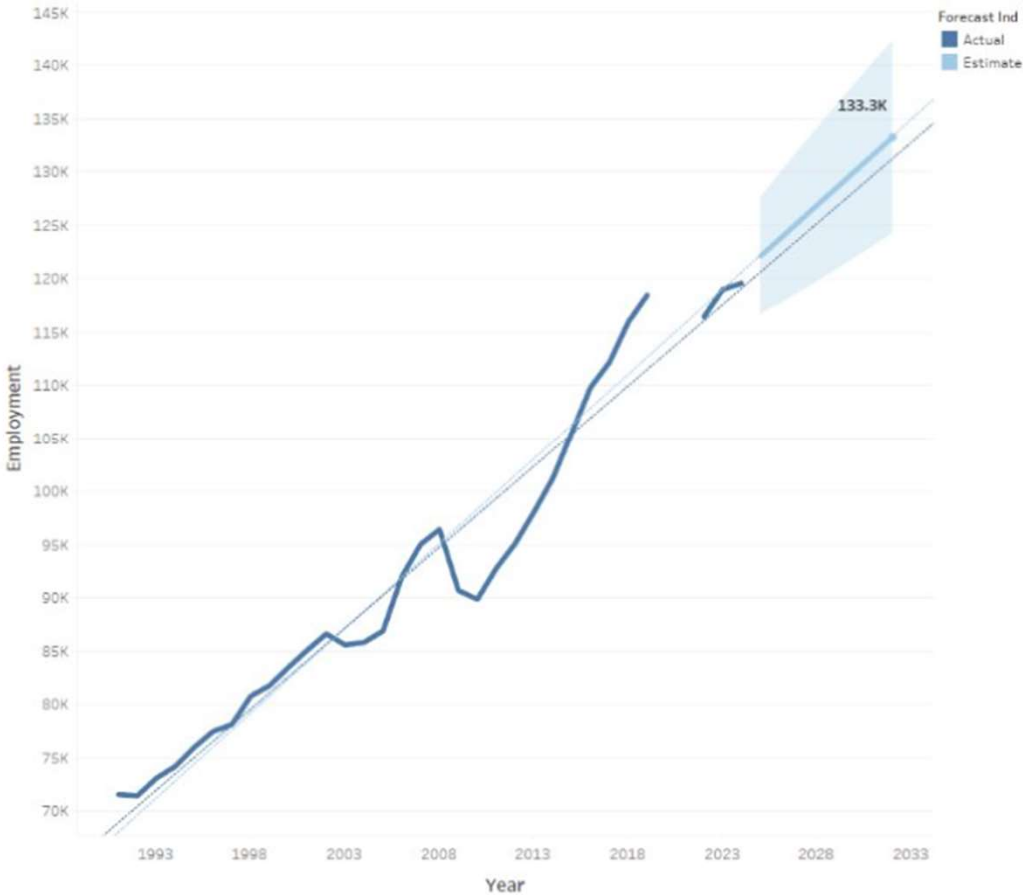


ECONOMY

TOURISM WORKFORCE

GOAL: 133.3K Jobs
15% growth from 2022

Thousands	2024	...	2031	2032
Upside	119.6	...	138.3	139.9
Baseline	119.6	...	131.7	133.3
Downside	119.6	...	125.1	126.6

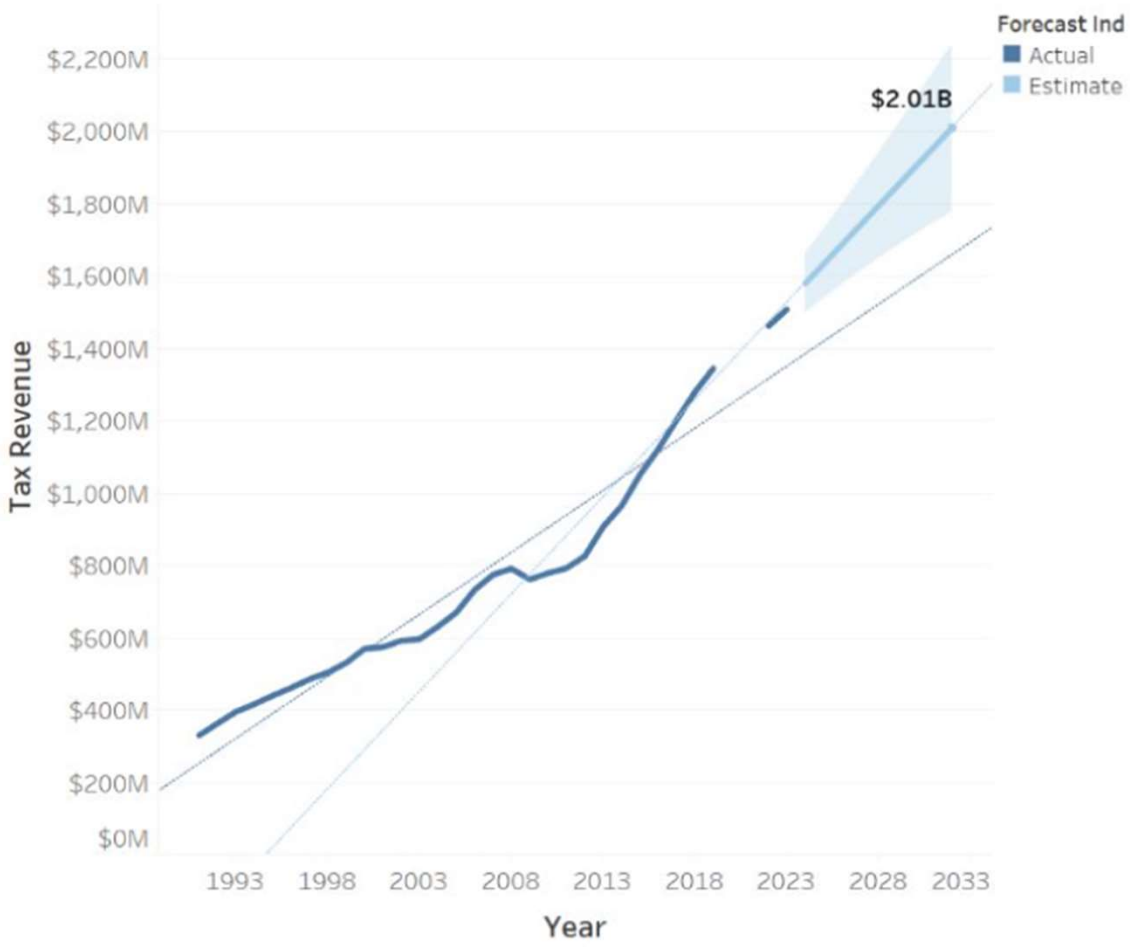


ECONOMY

TAX REVENUE

GOAL: \$2.0 Billion
38% growth from 2022

(Billions)	2023	...	2031	2032
Upside	\$1.51	...	\$2.05	\$2.11
Baseline	\$1.51	...	\$1.96	\$2.01
Downside	\$1.51	...	\$1.86	\$1.91



**OREGON DELIVERS
REMARKABLE
EXPERIENCES**

EXPERIENCES

RESIDENT SENTIMENT



Baseline Set



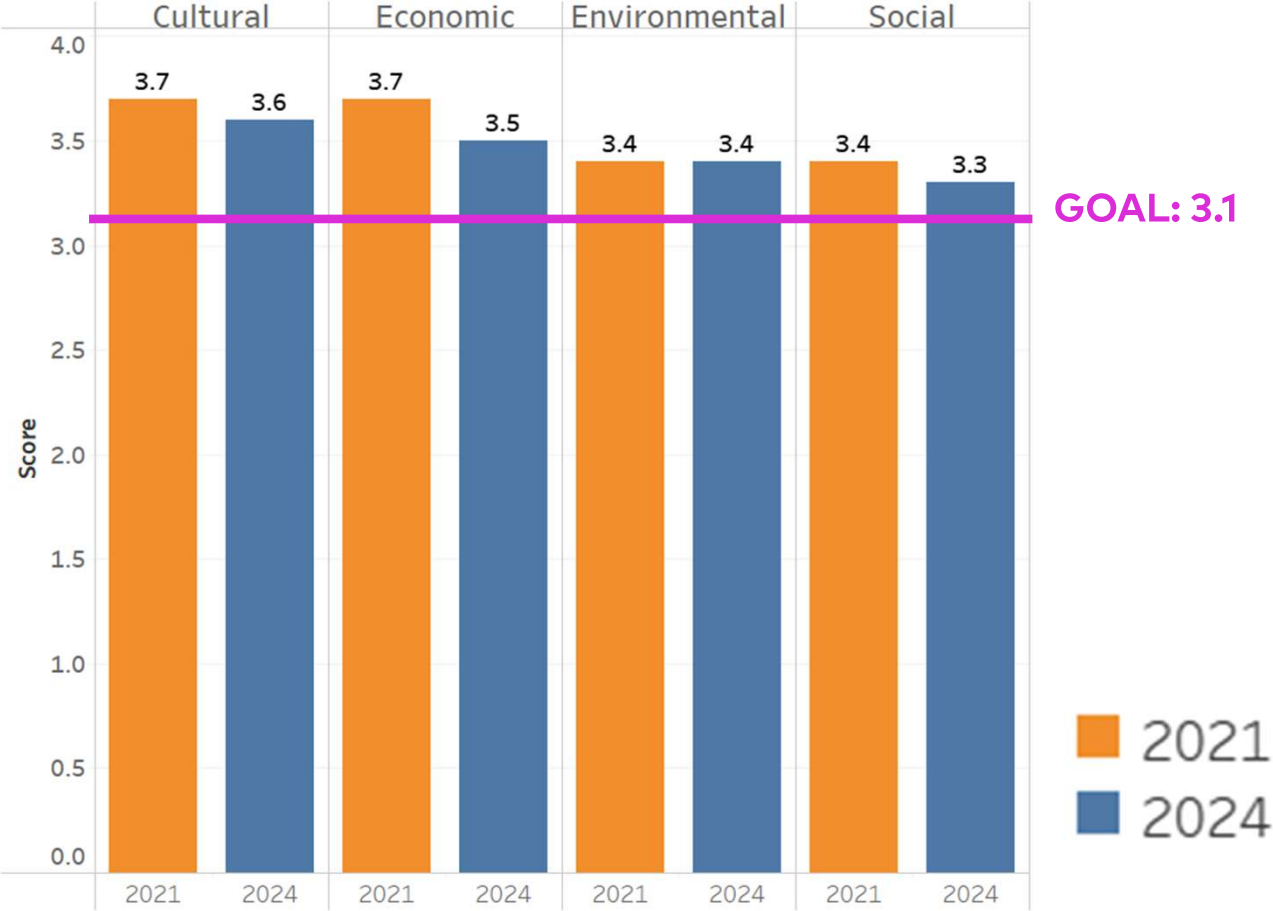
Goal Set

DEFINITION: Measure and monitor resident sentiment towards social, environmental, cultural and economic perceptions

KPI	Baseline (Positive)	Baseline (Negative)	Goal
Residents’ social perceptions of the value of tourism	3.3	3.2	3.1 or greater for positive perceptions with positive perceptions outweighing negative perceptions
Residents’ environmental perceptions of the value of tourism	3.4	3.3	
Residents’ cultural perceptions of the value of tourism	3.6	3.1	
Residents’ economic perceptions of the value of tourism	3.4	2.9	

YOY RESIDENT SENTIMENT

POSITIVE PERCEPTIONS



Source: 2024
Resident Sentiment

EXPERIENCES

RESIDENT SENTIMENT cont.

DEFINITION: Measure and monitor resident sentiment based off support for tourism in the residents' community (7-point scale)

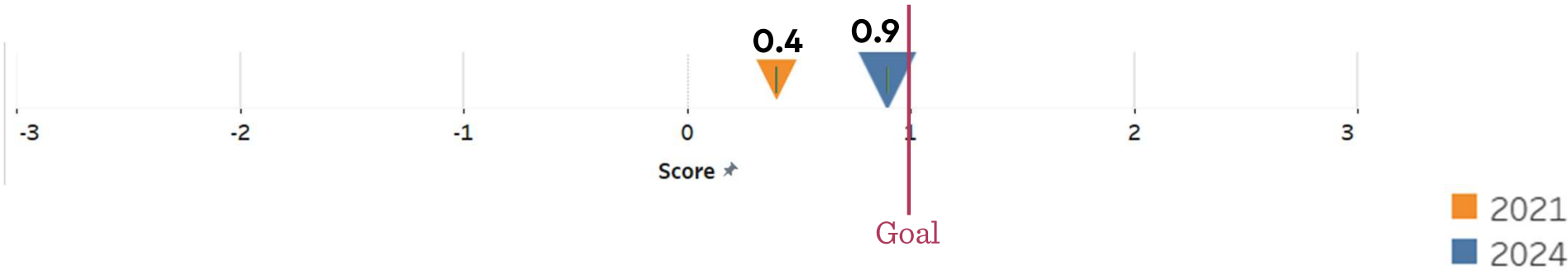


Baseline Set



Goal Set

KPI	Baseline	Goal
Residents' support for tourism development	0.9	≥ 1.0

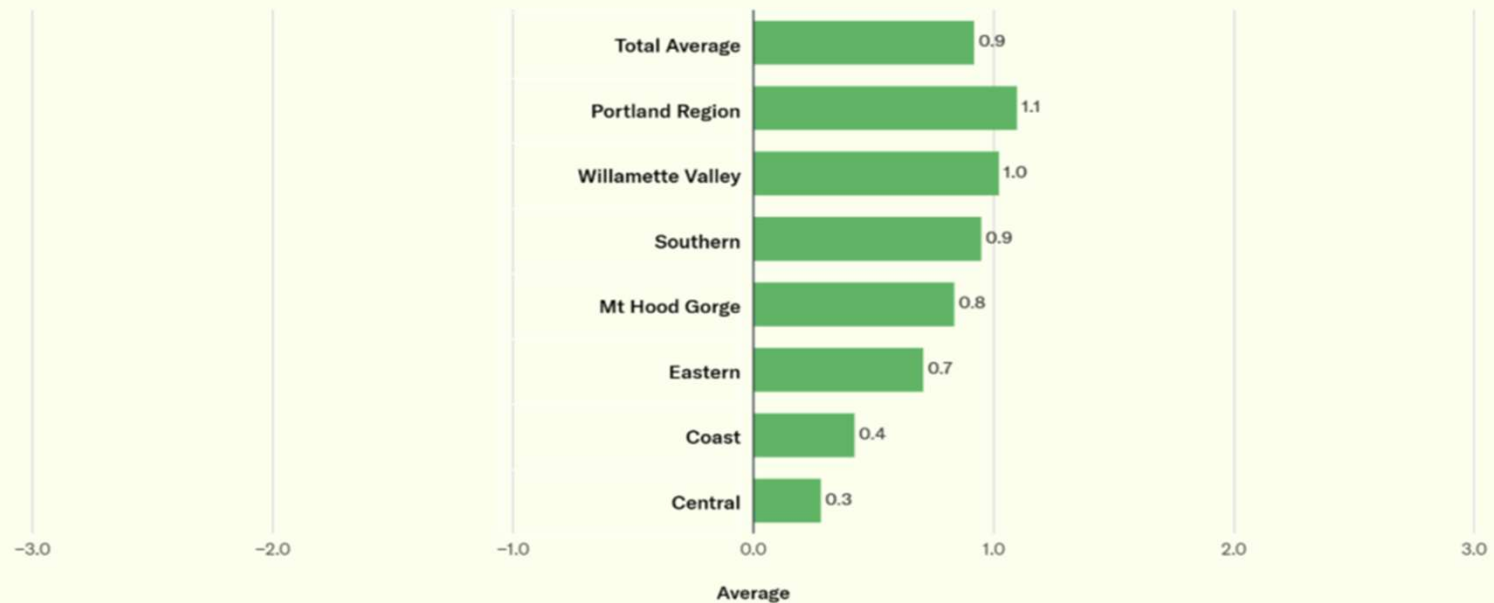


EXPERIENCES

REGIONAL SCORES

Support for tourism development by region

Overall Support for Tourism Mean Score by Tourism Region



EXPERIENCES

VISITOR PROFILE KPIs



Baseline Set



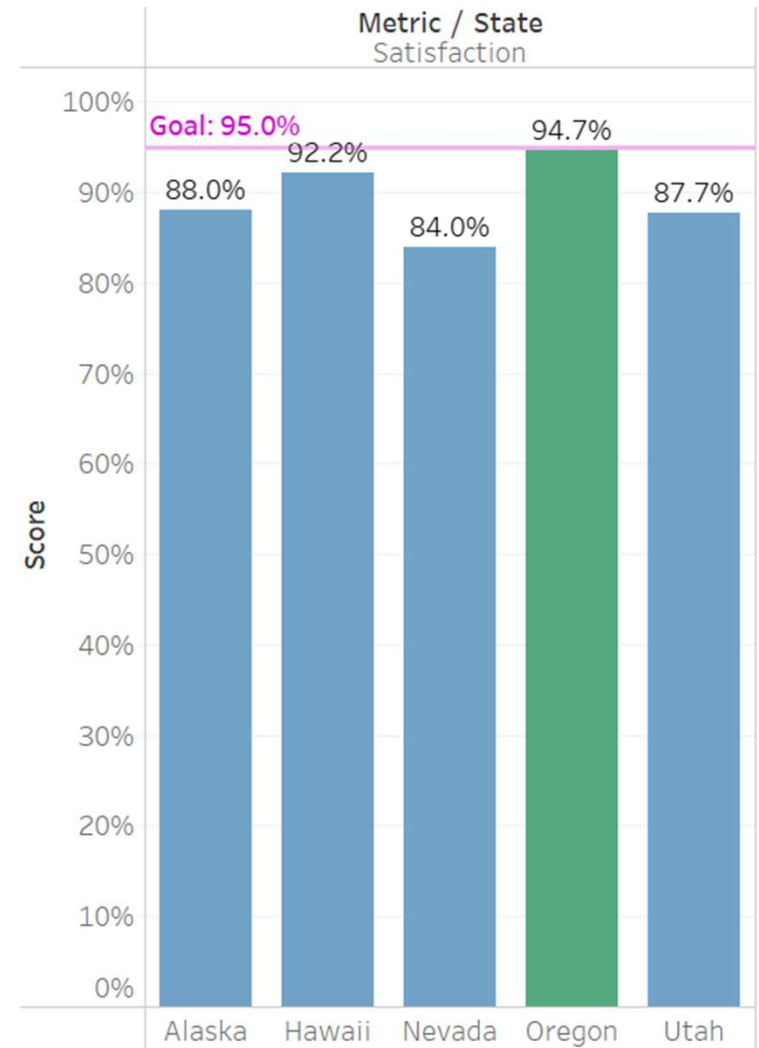
Goal Set

KPI	Baseline	Goal
Measure and monitor visitor sentiment via visitor satisfaction	94.7%	95%
Measure and monitor visitor sentiment via Net Promoter Score	44	50
Measure and monitor visitor sentiment via likelihood of travelling to and within Oregon in the future	88.4%	90%

EXPERIENCES

VISITOR SATISFACTION

Oregon vs Comp Set



EXPERIENCES

VISITOR PROFILE KPIs



Baseline Set



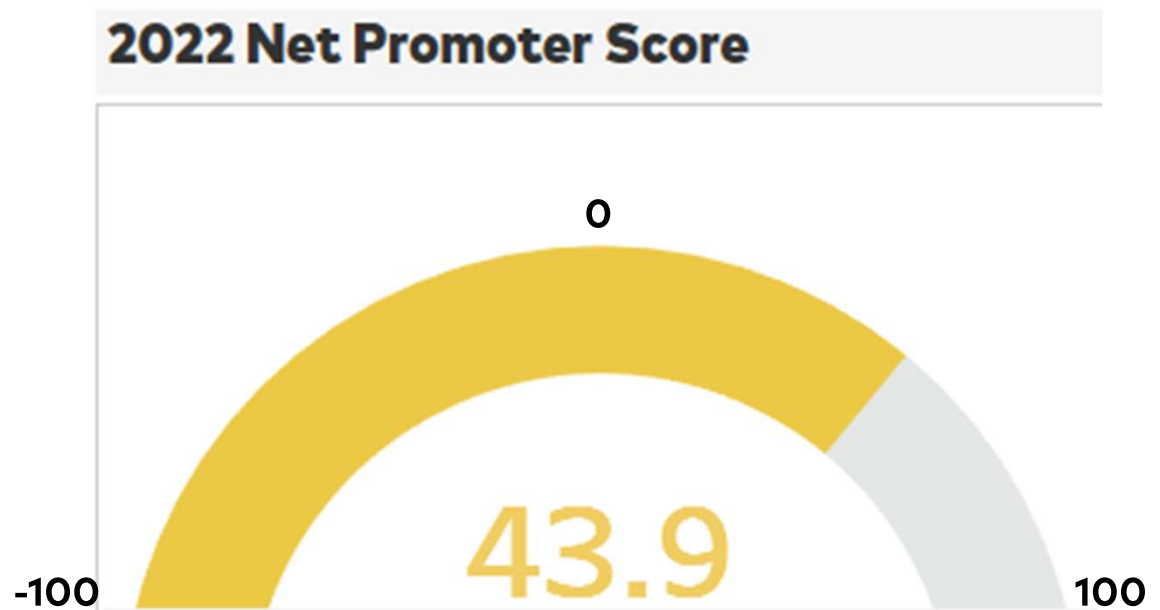
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EXPERIENCES

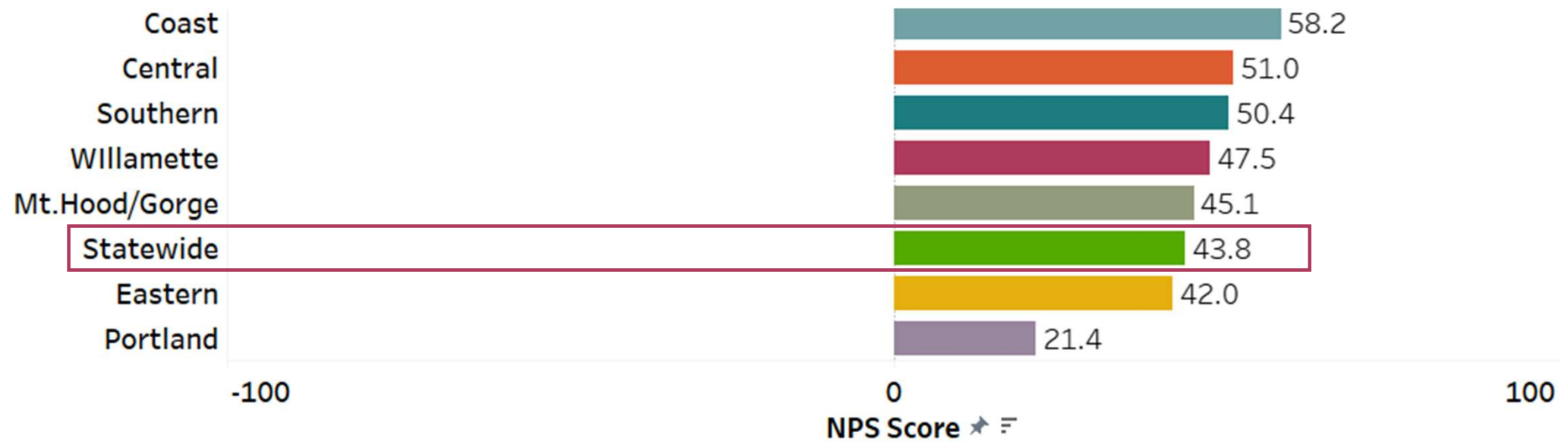
VISITOR PROFILE KPIs

Any score over 50 is regarded as good and 70 is seen as excellent.



EXPERIENCES

NPS BY REGION



EXPERIENCES

VISITOR PROFILE KPIs



Baseline Set



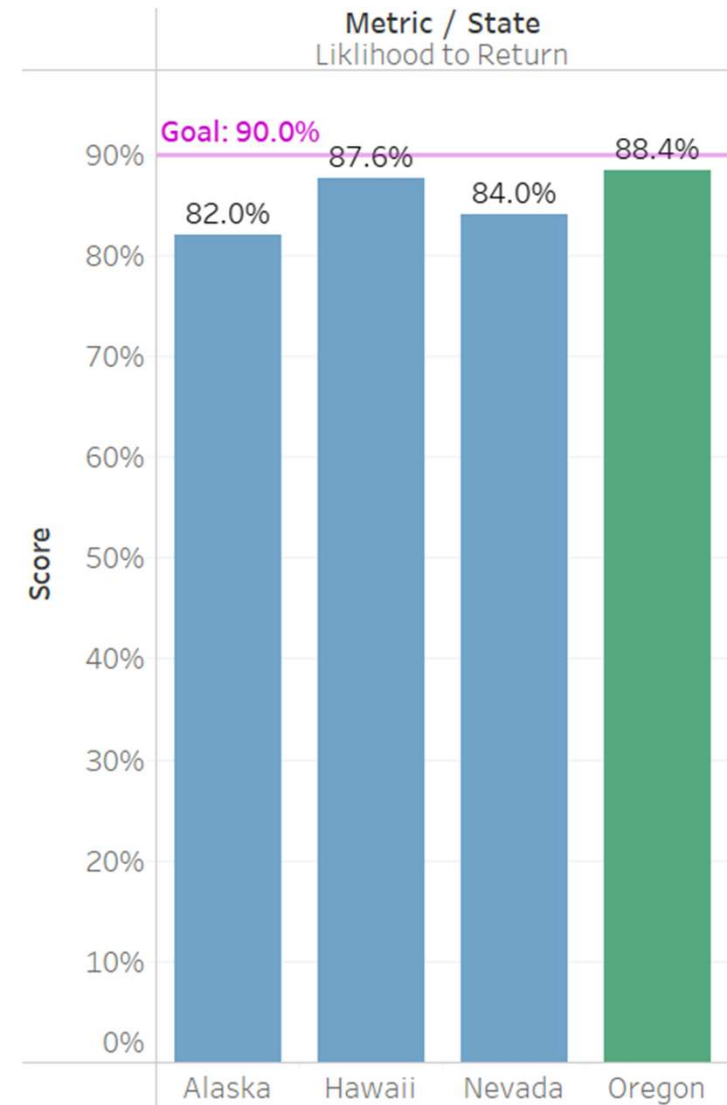
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EXPERIENCES

LIKELIHOOD TO RETURN

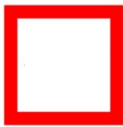
Likelihood to Return
Oregon vs Comp Set



OREGON RESPECTS ITS NATURAL ENVIRONMENT

ENVIRONMENT

GHG EMISSIONS KPI



Baseline Set



Goal Set

DEFINITION: Records and monitors Travel Oregon's greenhouse gas (GHG) emissions

KPI	Baseline	Goal
Travel Oregon’s greenhouse gas emissions	TBD*	At least 45% below 1990 emission levels by 2035 & At least 80% below 1990 levels by 2050

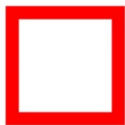
*Emissions measured by MMT

ENVIRONMENT

INVESTMENT KPIs



Baseline Set



Goal Set

DEFINITION: Travel Oregon’s investment (funding and engagement) in supporting the development and promotion of sustainable and regenerative tourism.

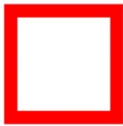
KPI	Baseline*	Goal
<u>Funding</u> going towards supporting the development and promotion of sustainable and regenerative tourism.	\$90,039	TBD
<u>Engagement</u> (hours) going towards supporting the development and promotion of sustainable and regenerative tourism.	70 hours	TBD

*Baseline from FY23-24

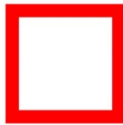
ENVIRONMENT

INDUSTRY ENGAGEMENT KPI

- **DEFINITION:** Records and monitors the steps Oregon's tourism industry takes to reduce its greenhouse gas emissions and adopt sustainable and regenerative tourism practices



Baseline Set



Goal Set

KPI	Baseline*	Goal
% of tourism industry partners who engaged in sustainable and regenerative tourism practices	Early 2027	TBD

*2026 Tourism Industry Partner Survey (TIPS)

ENVIRONMENT

VISITOR ENGAGEMENT KPI

DEFINITION: Record and monitor the steps visitors take to reduce their greenhouse gas emissions and adopt sustainable and regenerative tourism practices



Baseline Set



Goal Set

KPI	Baseline*	Goal
% of visitors who engaged in sustainable regenerative tourism practices	79.7%	90%

*2022 Visitor Profile Study

AREAS OF FOCUS

1. **Support for tourism development**
2. **Visitor satisfaction**
3. **Visitor net promoter score**
4. **Visitor likelihood to return**



NEXT STEPS

- Remaining baselines and KPIs
- 2025 Visitor Profile Study
- Strategic Vision Dashboard
- Action planning and biennial planning KPI usage



THANK YOU