



Inspiring Explorers

TRAVEL OREGON 2013-2015 STRATEGIC PLAN

(Draft for Comment)



Cover photo of Tamanawas Falls,
Tyler Roemer

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Travel Oregon

2013- 2015 Strategic Clarity Overview

OUR STRATEGIC ANCHORS

OUR VISION-OUT: A better life for Oregonians through strong, sustainable local economies.

OUR MISSION: Share the stories of Oregon's people and places. Through innovation and partnership, we inspire travel that drives economic development, ensuring the preservation of Oregon's way of life and its natural places.

OUR UNIQUE VALUE: Travel Oregon delivers unequalled tourism expertise to the entire state and tells Oregon's story to the world.

OUR BRAND INTENTION

Travel Oregon's partners feel connected, empowered, optimistic and inspired.

OUR VALUES

INTEGRITY COLLABORATION

PURPOSEFUL

We are passionate Oregonians committed to achieving success through mutual respect, innovation and leadership.

LEADERSHIP EXCELLENCE

OUR STRATEGIC IMPERATIVES

- Maximize statewide economic impact.
- Support and empower our partners.
- Champion the value of tourism.
- Run an effective business.



traveloregon.com

2013 - 2015 STRATEGIC IMPERATIVES			
① Maximize statewide economic impact.	② Support and empower our partners.	③ Champion the value of tourism.	④ Run an effective business.
2013/14—2014/15 KEY INITIATIVES			
<ul style="list-style-type: none"> • Inspire overnight leisure travel through industry leading brand marketing/communications • Align and optimize locally integrated sales/marketing program • Drive business from key international markets. Deliver integrated sales/marketing plans leveraged with global partners • Perform analysis and create plan to instigate key policy changes that positively impact Oregon's tourism industry 	<ul style="list-style-type: none"> • Develop and implement statewide tourism master plan • Enhance existing niche markets and investigate emerging opportunities • Expand participation in Travel Oregon Forever Programs • Provide strategic professional industry development & training opportunities • Realize statewide, strategic integration of technology • Implement state of the art visitor information network 	<ul style="list-style-type: none"> • Conduct research and build toolkits to enable partners to take action • Develop and deliver key Value of Tourism messages • Build and implement policy maker engagement plan 	<ul style="list-style-type: none"> • Measure and drive improvement in employee engagement • Perform strategic portfolio management • Develop and deliver strategic dashboard • Develop and begin implementation of technology roadmap
2013 - 2015 KEY MEASURES			
<ul style="list-style-type: none"> • All regions show increase in year over year statewide transient lodging tax revenues. Up 5.9% by 6/30/14 and up 6.2% by 6/30/15 • Earned media impact index increases • Paid media impact index increases • Execution has begun on plan to eliminate identified barriers 	<ul style="list-style-type: none"> • Local Engagement Baseline increases • Utilization index of Travel Oregon program leads and tools increases 	<ul style="list-style-type: none"> • Industry utilization of Value of Tourism data and messaging in their communication efforts increases • Earned media impact index increases 	<ul style="list-style-type: none"> • Exemplary ratings of fiscal processes from third party evaluators are maintained • Employee engagement increases
BOOM BOX	BOOM BOX	BOOM BOX	BOOM BOX
Optimize locally integrated sales/marketing	Develop a statewide master plan for tourism	Deliver Value of Tourism messages	Recognized as a top Oregon non-profit to work for

Welcome

There's a good chance if you're reading this, you care about Oregon. Only somebody who cares would take the time to understand how amazing people all over the state are using tourism to make life better. In fact, there is a good chance ***you are one of those amazing people***—and your ideas, concerns, and hopes will show up in these pages.

Some of you will read every word and make notes. Others will skim through pausing only when something catches your eye. Still others won't read it at all; you'll just skip to the one page chart that covers just about everything in the written plan. That's just fine; it's a really good chart. There is no right way to read this plan, we're just happy you're here and glad you care.

Oh, and one more thing, this plan is really as much a *conversation* as it is a plan. It's all about making life better for Oregonians. Just by reading this plan—however you choose to do it—you are part of the conversation.

Overview

This section is supposed to be called an "Executive Summary." Apparently executives are so darn busy they need the "bottom line" version of things to make important decisions. Let's be clear, *everyone* is really busy and everyone is welcome to read this section of the plan whether you're an executive or not. We thought "Overview" sounded better. It's helpful to get a quick look at the big issues that you'll be seeing in this plan and get a preview of Travel Oregon's priorities for the next two years and beyond.

Travel Oregon's vision is: "A better life for Oregonians through strong, sustainable local economies." That is what this plan is all about. This vision will be achieved in the context of four strategic imperatives:

- **Maximize statewide economic impact.**
- **Support and empower our partners.**
- **Champion the value of tourism.**
- **Run an effective business.**

Please note the word, "imperatives." This means things that *must* be done. These aren't strategic possibilities or suggestions; these are imperatives. Oregonians all over the state will be able to point to real economic benefit as a result of travel and tourism. The plan also recognizes the need for specific performance indicators that will allow us to keep score and see how we are doing along the way.

Improving economic conditions statewide is an audacious goal and there is no way Travel Oregon can achieve those goals alone. Travel Oregon will engage with a wide range of public and private businesses and agencies to deliver inspirational experiences to travelers and explorers from around the world.

We recognize the power of strategic alignment with partners, and we know travel and tourism is making a big difference. If you've been watching TV and movies lately, then you have seen how popular Oregon is as a setting or location. The Oregon Employment Department in 2012 declared the tourism industry a "comeback industry" for Oregon's economy¹, also adding that travel and tourism and Oregon's growing film and television industry are the "dynamic duo" of Oregon's economic recovery. In the past two years while economic recovery was tenuous at all levels, Oregon's travel and tourism industry added 3,000 new jobs.

Championing the value of the travel and tourism industry is easy once we get people to pay attention. The numbers speak for themselves. Let's do a little math. Oregon hosts nearly 29 million overnight person-trips annually². Travel Oregon spends \$1.14 to generate an overnight trip. That investment yields \$193 in visitor spending in Oregon and \$8 in local and state tax revenue. And, every \$523 spent in advertising creates enough economic activity to support one job³. You don't need to be a hot-shot executive to see the power of the industry and effectiveness of our investments.

The Oregon Employment Department in 2012 declared travel and tourism a "comeback industry" for Oregon's economy

Last but not least, this plan calls out Travel Oregon's ongoing commitment to excellence in the stewardship of its resources. This means *every* dollar and *every* job is considered against the criteria of the "highest and best use" of that resource to achieve the vision (you remember it don't you? *A better life for Oregonians through strong sustainable, local economies*).

There are more great ideas than we have money and resources. So a big part of this plan is calling out the choices that are going to bring the biggest bang for the buck. You will see choices that reflect the changing nature of the travel industry and consumer behavior. You will see choices that reflect the incredible impact from social media and mobile devices, and the emergence of new markets and products.

And the choices we make today need to make us ready for tomorrow. This plan is not simply about looking to the next two years; it is teeing up Oregon to be a major player in the world of global tourism for years to come. There are solid reasons to be energized and optimistic for the future. We know people are travelling to different places for different reasons than they used to—seeking experiences and authentic adventure. Here's the thing: We don't need to change who we are to attract the attention of the world's explorers; in fact what we must do is remain authentic and guard the natural wonders all around us that makes jaws drop and spirits rise.

¹ "Film and Tourism: A Dynamic Duo for Oregon's Economy," *Oregon Employment Department*, Monday, July 30, 2012

² Visitor Profile: 2011, Longwoods International

³ Advertising Accountability Study: 2008, Longwoods International

A New Approach

Travel Oregon is ten years old at the writing of this plan. Among the many lessons learned over the years, one fact stands out as prominently as the Willowa Mountains on a clear day: When people work together with a clear, common purpose in mind—amazing things happen.

The quality of a visitor’s experience depends on the coordination of a thousand variables and interactions. This coordination is achieved through ongoing communication, preparation and the alignment of values and goals. The more alignment we achieve, the more we can rise above our individual limitations and gain the momentum that comes from achieving one success after another.

So, we succeed when we communicate and find alignment. That is how we approached developing this plan. It is the result of a yearlong conversation with travelers, industry professionals, government officials, international partners, researchers, and a wide range of subject matter experts.

We spoke to people all over the state. Actually, the primary goal of our effort was not to speak but to *listen carefully*. A small team from Travel Oregon listened to local community members representing economic development, local government, transportation, small business and tourism entities for nine facilitated conversations. The team visited Eugene, Portland, Ashland, Brookings, Bend, Burns, Seaside, La Grande, and The Dalles. Many of the ideas and concerns expressed in these sessions are present in this plan. It is clear that statewide efforts demand local development and support. We heard the need for local communities to better understand who is traveling to Oregon and what those travelers seek. We heard a continued need to build more access to classic and new Oregon destinations—no matter how people choose to explore Oregon.

All those thoughts and data went into a report—which fed into this plan. Just writing down the findings doesn’t seem like enough; even with all the data there is something missing. What is missing is the smell of the ocean air on a sunny day in Brookings; the amazing view of the Three Sisters driving from Burns to Bend; the wide open night sky in La Grande; the smell of the coffee roasters in Portland. For all the notes, research points, and performance metrics—there is no way we can capture the simple elegance of people loving where they live. There were a thousand comments, head nods, and knowing looks that summed up the wisdom and tenacity of true Oregonians. We hope you see that spirit in this plan, and we hope you don’t have to look too hard.

STRATEGIC ANCHORS

With everything changing so fast it is easy to wonder about the value of a long term plan. Certainly a big part of the thinking in this plan is to build change-readiness into our industry to ensure adaptability and success for the long term. But another part of the planning process—indeed maybe the most important part of the process—is to identify those things that we *don’t* want to change very much. The strategic anchors, the mission, the brand, and core values remain more or less in place and they are the central lens through which we make choices and measure success. In other words, this stuff is important and we refer to it every day.

OUR VISION OUT

A Better Life for Oregonians Through Strong, Sustainable Local Economies

This vision puts local economies at the center of the bulls-eye for success. In other words, increases in travel and tourism are good things to the degree that they help create better lives and make a positive impact in the form of job creation, and sustainable economic growth. We believe that positive results will flourish in the context of *local* involvement, innovation, and collaboration.

To this end Travel Oregon is committed to reaching out to communities around the state and helping to build tourism resources from the basics. We heard story after story of communities with great potential and great ideas—but a lack of clarity about how to refine their ideas and get the message out. We heard about the need to offer training and support to create a world-class experience for people who explore Oregon.

The continued development of the Rural Tourism Studio is a strategy that harnesses the needs, expertise, business development and marketing of local communities in a way that pays off for all Oregonians. More on that later, but if you want to take a break from reading—maybe refill your coffee—you could check out this link: <http://industry.traveloregon.com/news/archive/sharing-community-success-stories/> to a video that shows how these efforts have helped to transform the little town of Oakridge.

If you watched the video you saw a community aligning resources and leveraging the expertise and marketing power of their local and regional destination marketing organization and Travel Oregon to fundamentally re-invent itself.



With this vision in mind, Travel Oregon has made commitments to:

- Build from basics
- Leverage opportunity from existing actions and events
- Align with key partners and stakeholders locally
- Optimize alignment of resources with Oregon's Travel and Tourism industry

- Brainstorm long term product development cycles
- Establish specific pilot efforts and measure results
- Clarify local key performance indicators (KPIs): which measures are most relevant for each specific market

While the vision tells us where we want to go; the mission and our unique value position describes exactly what we will do and why we are ready for the job.

OUR MISSION

Share the stories of Oregon’s people and places. Through innovation and partnership, inspire travel that drives economic development, ensuring the preservation of Oregon’s way of life and its natural places.

Again you will notice the connection between what we do and the result of driving *economic* development. You will also note the value of stewardship that is intrinsic in the mission. The magic of Oregon is in the interplay between the people and their natural surroundings. It is a connection that demands authenticity, and a curious mix of reverence—and irreverence as we tell the stories of the people and places that make Oregon so inspiring.

OUR UNIQUE VALUE

Travel Oregon delivers unequalled tourism expertise to the entire state and tells Oregon’s story to the world.

The work of the past ten years is paying off now in the form of improved visitor levels across the state. More importantly, we have developed the expertise and the infrastructure to optimize our efforts and drive even better performance in the future. Travel Oregon’s industry leading sales and marketing expertise puts Oregon on the map for explorers around the world. In the coming years we will see more and more visitors from Europe, Japan, Korea, and Canada—and we are likely to welcome significant numbers of travelers from China who see our beautiful, wide open spaces and tax free shopping as an irresistible mix.

OUR BRAND INTENTION

Travel Oregon's partners feel connected, empowered, optimistic and inspired.

People familiar with branding know that your brand is a promise to your customer of the experience they'll have with your product. Good destination branding tells the story of who you are in a visceral, moving way, eliciting an emotional connection to the place. We know the Travel Oregon brand work is inspiring consumers to choose Oregon. We want to deliver that same brand promise as an organization.

We want our industry partners to feel connected, empowered, optimistic and inspired when they

interact with us. The values of our organization must reflect what we value as a people and a state. This close attention to who we are will make Travel Oregon the kind of partner the industry wants and needs. This does not mean there won't be times when we have differences of opinion. That kind of creative tension is often the catalyst for revelation and deeper respect. What it means is that the relationships are built on trust and a healthy, practical understanding of expectations.



Industry partners are our greatest strength; Team Oregon at 2013 NTA convention.

2013-2015 STRATEGIC IMPERATIVES

A good strategic plan is accessible and manageable. It offers clarity and focus. It is explicit about priorities and desired outcomes. The plan is supported by performance measures that reflect its priorities. And most importantly, a reasonable person can read it and say—"Yeah, that makes sense."

There are four strategic imperatives in the plan. Each is backed up with specific actions and initiatives that will help spin the flywheel and build momentum. Each area of focus will generate specific measures and performance indicators; these are the answers to the question, "How do we know if the plan is working?" The four areas are:

- **Maximize statewide economic impact.**
- **Support and empower our partners.**
- **Champion the value of tourism.**
- **Run an effective business.**

Hopefully you look at those areas of focus and think, “Yeah, those make sense.” If you look at them again, you might even comment on the obvious interdependence between them. “They tie together...” If you’ve had a lot of coffee, or you are just prone to overanalyze things, you might call out their catalytic or synergistic potential—how they should work together to create an outcome greater than the sum of their individual parts.

Your careful review will note that the four imperatives have nothing to do with any individual department or job function. ***Achieving these four imperatives is everyone’s job.*** Every employee has accountability to the whole plan; the imperatives themselves prevent the rise of self-serving silo-thinking that chokes so many organizations.

MAXIMIZE STATEWIDE ECONOMIC IMPACT

It is no accident that statewide economic impact is at the top of the list. Many counties and communities around Oregon are struggling to find a new foothold in the post-recession global economy. The industries that carried the day in the last 50 years may be weakened—or gone altogether. Most agree that economic development and recovery works best with a blend of service, manufacturing, and agricultural industries. Candidly, we know many people question the potential of travel and tourism to be a powerful, long term engine for economic recovery.

But the numbers in Oregon are telling a very different story. Travel and tourism is working throughout Oregon to create a broad spectrum of jobs and to attract development that benefits entire communities. More and more people are waking up to the potential of the industry to reinvigorate local economies. Like the business owner in Brookings who said, “I run a hardware store, and I don’t plan to sell rakes to tourists—but I know that tourists bring more businesses and families to the area and my business depends on them.” Or the hotelier in Portland who said, “Reaching our potential as a global tourist destination *is* the next big thing we are doing in Portland.” Travel and tourism aren’t on the sidelines anymore. The emergence of our country’s Brand USA strategy is ensuring that as well and Travel Oregon is leveraging their programs at the highest possible levels.

So what will it take to optimize the potential of the travel and tourism industry to drive statewide economic development in Oregon? In the next two years Travel Oregon will:

- Inspire overnight leisure travel through industry leading brand marketing/communications
- Align and optimize locally integrated sales/marketing program
- Drive business from key international markets. Deliver integrated sales/marketing plans leveraged with global partners
- Perform analysis and create plan to instigate key policy changes that positively impact Oregon’s tourism industry

Travel Oregon knew long ago that brand is a big deal. That is why we partnered with Wieden & Kennedy—a global powerhouse in marketing communications with deep roots and love for Oregon. Over the years we have seen the power of our brand marketing outperform many of our peers with

more resources. From TV and online advertising that runs from San Francisco to Vancouver, BC, to a digital footprint that pushes content to owned, earned and partner sites, to award-winning PR outreach, all our communications speak with the same branded voice—conversational, aspirational, awe-inspiring and Oregonian to the core.

Oregon is becoming more and more known as a place where majestic beauty meets creativity. This sort of X factor captivates imaginations, whether it's that of a *New York Times* writer or the millions who say they plan on visiting this year. Because it's difficult to comprehend great beer, wine, food, art, epic recreation, gorgeous nature and friendly and civic minded people merging in a single place.



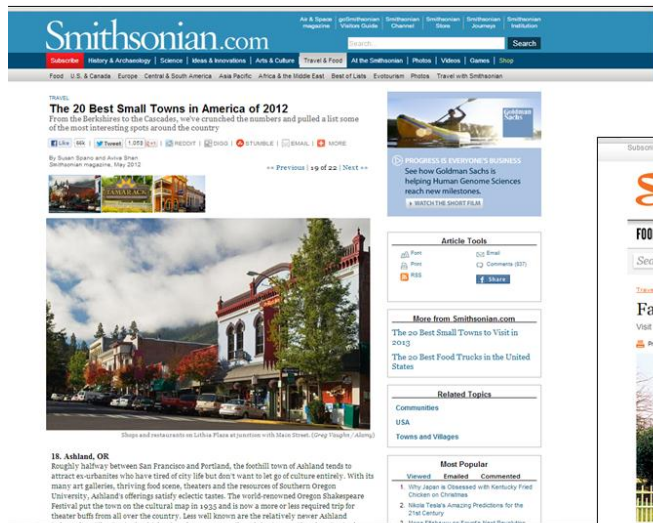
Authentic experiences are the purest form of inspiration for Oregon's "Explorer" target audience

Oregon is too good to be true. That's not a bad problem to have.

It is this inspirational quality that is captured in our brand. People come here not to get away, but to bring something back with them. The folks who choose to visit Oregon are a lot like Oregonians themselves—they value what they've seen and what they've done, more than what they own. While it's not tangible, inspiration is valuable. It's the fuel that propels many of us to lead fulfilling lives and ultimately be happy.

Recent coverage proves that the media sees Oregon the same way we talk about her: Oregon makes the "Forbes's list of Favorite Inspirational Locations in the US for 2013" (<http://onforb.es/Wv34Se>). Oregon boasts two of the most inspirational road trips in the world (<http://bit.ly/PYE5pi>). In fact one of the great things about Oregon is that it is consistently featured in travel and lifestyle publications with no one destination hogging the spotlight. The state has so much to offer that this diversity of attractions and way of life is turning from a curiosity into an obsession for a growing audience.

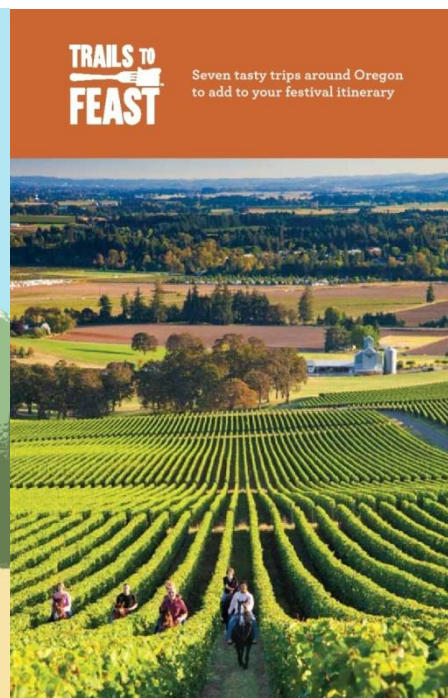
Who is that audience? We don't follow traditional demographics to define Oregon's ideal target market. Instead, we've singled out a type of person ripe for the stuff Oregon has to offer. We call them "Explorers," and if you're ready for inspiration, you're our audience. Explorers are active travelers, not passive. They don't get away to relax; they're busy seeking rich experiences. Why? Because authentic experiences are the purest source of inspiration.



Towns across Oregon are constantly featured as some of the top places to visit and live in the country.



These folks like to choose the less-traveled path. They pride themselves on tracking down experiences that make for great stories, and much of that includes doing what the locals do for fun. Explorers see these discoveries as both fun and meaningful.



The great news is that Oregon is already very much on their radar and it's working. Over the last ten years response rates to Travel Oregon's marketing has grown over 400%. Another powerful testament to the strength of our marketing is also the recognition of our peers across the country. To highlight a few recent accolades: our culinary campaign, Oregon Bounty, was named the best overall campaign in the country in 2011 and our Travel Oregon Visitor Guide won the best visitor guide in the

Travel Oregon's culinary PR campaigns recently won a prestigious Bulldog Media Relations Award. Pictured left to right: Travel Oregon featured 50 Oregon artisans and a culinary media and influencer event; a culinary trails guide highlighting Oregon's foodie wonderland.

country (two years in a row), both awarded by the US Travel Association. Our 2012 PR efforts were honored with a Silver Level Bulldog Media Relations Award for “Excellence in Media and Publicity Campaigns.” This prestigious award, judged exclusively by working journalists, includes our work on the Full on Oregon, Tasting Table, Oregon Bounty Food Assault and Trails to Feast campaigns.

We know that there are hundreds of great ideas out in the local markets. The question is how do we get them off the ground? To be blunt, local markets in Oregon will never have enough time or money on their own to get their message out to the right potential travelers for the experiences they can deliver. That means that Travel Oregon must make the connection between their national and international marketing efforts, their online and social media resources, and their business design expertise with individual, local markets. Building additional bridges to the local markets is one of the “ah ha’s” that came from the listening tour.

Travel Oregon also knows that statewide impact means increasing the number of travelers and increasing their length of stay in Oregon. Who are the most likely travelers to come to Oregon? What demographics are performing well? What product lines are attracting travelers; agri-tourism, wine, craft brewing, wild-west, cycling, birding, the coast, golf, skiing, rafting, truffle hunting...and the list goes on. Travel Oregon needs to continue to refine its brand marketing plan to connect the right messages with the right people on the right screen when they are most receptive to dreaming about travel. This will drive an increase in the number of people coming to Oregon for leisure travel.

We know right now that many possible ideas and markets are limited by often outdated or misapplied policies regulating land-use, events, and the like. Through the support of the Consortium—our panel of industry leaders and subject matter experts—we are reviewing and defining the specific places where we can open up the state’s tourism potential while ensuring continued stewardship of our natural resources.

One of the goals in this plan is that you not only read it, you “get it.” Then, once you’ve got it, you share it. Sometimes you have to surprise people with amazing facts to get their attention. Did you know that Oregon has an incredible reputation in the global tourism marketplace? Check out these facts—and read them out loud so that you will remember them and be able to weave them into conversations with friends and associates.

Overall international markets (Asia, Europe, Oceania, Canada) have been trending upwards for the past five years. In fact, in 2012 the increase year over year was 13%.

Canada continues to be Oregon’s number one international market. In 2012, visitation increased 22% over the prior year.

Emerging markets are here. China is Oregon’s fastest growing international market seeing a 41.5% increase in 2012 vs. 2011. It is also the top spending overseas market at over \$30 million in 2012.

International Arrivals to Oregon Increase 13% in 2012

	2009	2010	2011	2012
Total, All	1,467,000	1,628,000	1,756,000	1,984,000
Total, Top 15	1,334,000	1,438,000	1,502,000	1,785,000
Canada	1,084,000	1,159,000	1,208,000	1,470,000
Japan	46,000	49,000	46,000	50,000
UK	35,000	38,000	35,000	38,000
China	13,000	19,000	26,000	37,000
Germany (+A,CH)	31,000	32,000	33,000	36,000
Australia, NZ	32,000	36,000	38,000	36,000
Scandinavia	23,000	24,000	23,000	24,000
Korea	18,000	22,000	23,000	23,000
Mexico	10,000	12,000	15,000	17,000
France	12,000	12,000	13,000	13,000
Brazil	6,000	7,000	9,000	10,000
Taiwan	7,000	9,000	10,000	9,000
India	5,000	7,000	8,000	8,000
Benelux	7,000	7,000	7,000	7,000
Italy	7,000	6,000	6,000	6,000

Travel Oregon estimates are based on and extrapolated from aggregate card usage data provided by VisaVue® Travel. They incorporated data from other independent research sources. Spending amounts and patterns are based on face-to-face Visa card transactions in Oregon. Transactions utilizing cash, pre-paid, phone, internet, and other credit/debit cards are not included. Conversion factors are used to extrapolate arrivals, but spending per visitor is in its raw form (only Visa card purchases). Amounts on this sheet are rounded, with associated rounding errors. All calculations are done on unrounded data.

The point is you shouldn't be surprised to see busloads of happy people from China shopping at the Woodburn Company Stores outlet mall or standing in awe as they take in the panorama of Crater Lake on a bright summer day. Those economic activities don't just happen; they are the result of investments in travel and tourism as one of Oregon's vital industries.

Key Measures for Maximizing Statewide Economic Impact

From day one, Travel Oregon put stock into research, measures, and analysis. Over the years our belief in the power of research and measurement has increased. The more things change, the more important measurements become. So how will we know if we are succeeding in our goal for statewide economic impact?

- All regions show increase in year over year statewide transient lodging tax revenues by 5.9% by 6/30/14 and by 6.2% by 6/30/15
- Earned media impact index increases
- Paid media impact index increases
- Execution has begun on plan to eliminate identified barriers to improving the impacts of tourism

Bottom line: all regions show growth in statewide lodging tax revenue.

This business of earned and paid media impact (also known as PR and advertising, respectively) is important. Back in the old days when there were just a few TV channels and no internet—it was reasonably easy to measure the impact of media. Nowadays it's hard to know what's important. Is it media impressions measured by circulation? Click throughs on blog articles? Likes on Facebook? The answer is that the measure may change depending on the goals of a particular campaign in a particular (local) market. The way visitors are consuming media is changing more rapidly than ever before. Our key performance indicators must anticipate these changes. What you will see is Travel Oregon moving more and more towards a both qualitative and quantitative approach to analysis. Were our key messages coming through? Was Travel Oregon listed as a planning resource? Has our overall social media influence increased? The net effect of course is that the media strategy “works.” And it works to the extent that it motivates real trips all over Oregon.



Governor Kitzhaber joined Oregon's tourism leaders on trade missions to Japan, China, and Europe, where he met with tour operators, the media, and hosted a reception at the world's largest travel trade show, ITB.

Maximizing economic impact isn't only about building awareness and demand, but also about addressing barriers, impediments to that impact occurring and being shared across the state. These barriers many times are based in public policy decisions. Travel Oregon will continue its work with Oregon's Tourism and Hospitality Consortium to identify policy challenges and actuate plans to overcome these challenges. These policy issues will be an integral part of the Statewide Tourism Master Plan and are likely to include:

- Realizing new international visa waiver opportunities, improving travel experiences at airports, maximizing state highway fund investments and assisting with local way-finding needs
- Evolving recreation practices on federal lands and balancing experiences-based agricultural needs with historical farming practices
- Retaining local tax policies that support and fund Oregon's tourism industry

SUPPORT AND EMPOWER OUR PARTNERS

Hopefully you have the experience of going to work and it doesn't feel like work. You get to connect with really smart, dedicated, creative people who are having fun—while they get real work done.

At Travel Oregon we are lucky to have that experience every day because the people we get to work with outside of our office walls are awesome. It is also because Travel Oregon is committed to a company culture that encourages innovation and risk taking. From the one or two person entrepreneurial businesses teaching fly-fishing or making artisan baked goods, to the large state or federal agencies working to manage transportation or wildlife habitat, Oregon is incredibly lucky to have so many talented people working on her behalf. A quick glance at our industry partners and you will be struck by the diversity they represent. The industry offers seasonal starting jobs and strong career paths requiring deep experience and advanced education from service industries to the sciences.

If you look a little deeper you will see that for all the diversity of the industry it is incredibly skilled in the arts of collaboration, project management, and team development. We get together. We talk—all the time—about issues big and small. We are an industry that believes deeply in the power of ongoing transparent communication with one another.

This plan is an example of our industry commitment to collaboration and transparency. These values are absolutely essential to any vision of success in achieving statewide economic impact. We know we have much more we can do; we have only begun to realize what is possible if we can do a better job of clarifying and sharing goals and if we can acknowledge the interdependence that binds our fates together and gain the maximum impact from our resources.

This plan is the next step to building alignment that could effectively allow Oregon to take its place as one of America's premier global tourist destinations welcoming millions of visitors every year; each one leaving with an appreciation for the wine, beer, artisan food, history, culture and adventure lifestyle that makes Oregon so special.

When partners interact with Travel Oregon, we want them to feel connected, empowered, optimistic and inspired. We are committed to those relationships, and know they will lead to real economic impact, exciting and sustainable jobs, a built-in protection mechanism for our eco-systems, and permission to live fully and authentically for those of us lucky enough to call Oregon home.

Develop and Implement a Statewide Tourism Master Plan

You may have realized that Travel Oregon sees the travel and tourism industry in Oregon as broad-based and inter-connected. We are not naïve to the fact that as an agency, industry, and state we can do much more. Our continued dedication to research and obsessive data gathering is helping bring clarity to the question of what's working and what's not working as well as it could.

Travel Oregon is ready to go to the next level in the application of business intelligence to help the industry work with clearer goals, more opportunity, and less risk and speculation. In the past we have

achieved success because we were able to count on the heroic commitment of our partners around the state. That's great of course, but it is no way to build a long term economic engine for Oregon. We are now seeing what is possible if we work better together with practical plans.

Our goal through the 2013-15 fiscal biennium is to collaborate deeply with industry partners and build alignment in the form of a **Statewide Tourism Master Plan**. We know, for example that there are areas that could perform significantly better with the addition of a little focus, expertise, or resources. We know that there are some products that need to be developed to attract specific segments of the traveling public. Other high performing assets may be ready to go to the next level and some public policies may need to be changed.

The statewide plan will paint a future picture of a thriving tourism landscape akin to the great destinations of the world. Think of the hiking hut to hut trail system in the Alps, or the extensive cycling trail network in New Zealand, or a wine country destination that offers sophisticated lodging, dining and touring infrastructure while still allowing you an intimate experience where you can actually meet the winemaker. Within this vision, the plan will reflect a practical, product development approach aligned with the regional marketing. It will contend with the specific challenges for resources, product development, and collaborative leadership as well as "all up" strategic, statewide objectives.

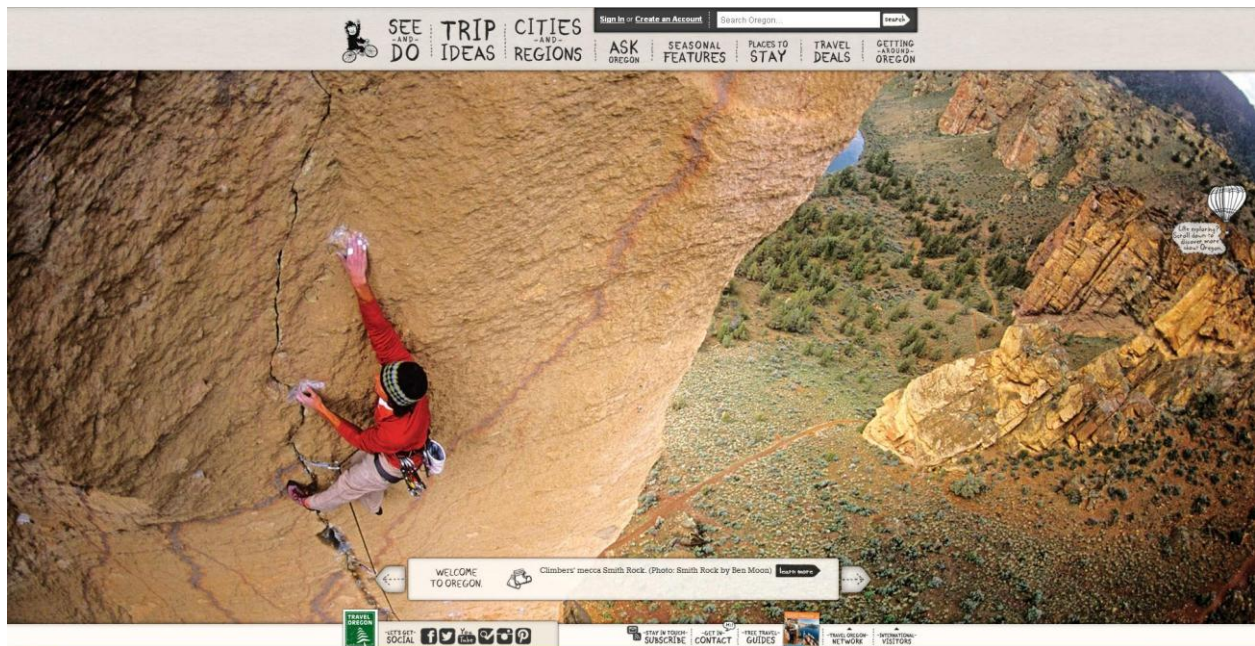
At the heart of the **Statewide Tourism Master Plan** is the goal to empower our industry partners and to bring more viable attractions and products to the attention of the traveling public. We know that Oregon benefits from several distinct niche markets. From craft beer tasting, to kite boarding, hiking and epic, scenic drives and rides, there is no shortage of activity in Oregon. The challenge will be to identify and optimize those niche markets that can help contribute to shoulder season travel, increase activity in rural locations, and create long term sustainable economic growth. This is the connective tissue between statewide strategic goals and the practical realities of local communities offering world class adventures to global travelers.

Deliver Professional Industry Development and Training Opportunities

During the listening tour in 2013, one theme we heard again and again is the need for ongoing training and human resource development. Oregon's amazing bounty and world class marketing will fall flat if the traveler's experience is not supported with talented, travel-savvy professionals. We know we need to raise the bar on the service experience our travelers find in Oregon. To that extent we are doubling-down on our commitment to offer ongoing professional development opportunities. These will take the form of online resources as well as customized programs for niche markets. We want to create a connection for those with a passion for service to the best practices that will result in a great experience for the traveler and profitability for the local business. We will also continue to improve and evolve the educational opportunities from programs like the annual Governor's Conference on Tourism and through the ongoing delivery of Travel Oregon 101.

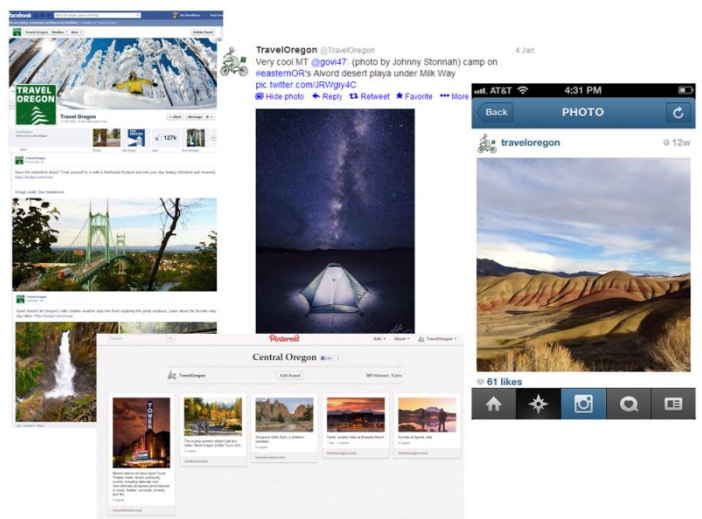
Realize Statewide Strategic Integration of Technology

One of the hallmarks separating Oregon from other state efforts to optimize tourism is its passion for research, data, and information technologies. Travel Oregon continues to be an industry leader in leveraging technology to lure visitors. Travel Oregon’s website is remarkable for its design, user interface, and the freshness of its information. It’s clear this website wants to really help travelers, and is a trusted tool for planning and inspiration. As a proof point, this year TravelOregon.com was selected as an Official Honoree in The 17th Annual Webby Awards in the Travel category beating out 11,000 entries from 50 US states and over 60 countries to land in the top 15% of all work entered, alongside the likes of Travel & Leisure and CNN, for “...exhibiting work of exceptional quality and remarkable achievement.”



The award winning TravelOregon.com is a trusted resource for trip inspiration and planning. Travel Oregon’s network of managed websites welcomes nearly 2 million unique visits a year.

We know that people are using mobile technologies for just about everything these days, so we make sure that Oregon shows up nicely on smart phones and tablets. We know that geo location technologies are a big deal, and so Travel Oregon maps everything on the site. We know social media is the through line for travelers—helping determine what to do, where to go, and capturing and sharing the experiences all along the way. Travel Oregon is fluent in the language arts of social media, engaging with its audience with 1,500 posts a year across multiple channels.



Travel Oregon writes, curates and publishes hundreds of photos, 200 stories and 1,500 posts a year on key social media channels.

Our ability to mine data from our online visitor interactions, allows us to get smarter every month, serve up what they need and anticipate important consumer trends. Every day the database at Travel Oregon, nicknamed the Orb, is growing to feed not only TravelOregon.com, but also websites across the state and country, with places to eat, drink, stay and things to do. It is about efficiency and making smart choices with limited resources. But it is also about being relevant and in real-time interaction with the modern traveler. Our goal moving forward is to use this information backbone to help drive confidence for resource investment and to measure performance in a way that allows us to make small changes that yield big results.

Specific actions we are taking in the next two years include:

- Statewide integration of Orb to Destination Marketing Organizations and trade group partners
- Launch a business intelligence platform that surfaces marketing analytics and consumer insights to benefit Oregon’s tourism industry

Implement a State of the Art Visitor Information Network

The combined expertise of our business partners and the increasing sophistication of the ORB will coalesce to allow Travel Oregon to launch a state of the art Visitor Information Network. This effort is a perfect example of how Travel Oregon is able to develop and deploy strategic resources that no single agency or business could achieve on its own. It is a resource that will benefit everyone, beginning with the traveler.

One of the primary ways Travel Oregon interacts with the traveling public while in Oregon is through the state Welcome Center program. It is important to understand that these centers are simply one piece of the state’s overall visitor information environment. This environment contains regional and local destination centers as well as private sector locations that also function as visitor information outlets. The mission of this environment is to deliver first class customer service and information to Oregon visitors. The desired outcome is to enhance the visitors’ experience in hopes of extending stays and creating return customers. In the next two years, we plan to help create a stronger overall information environment by:

- Assessing the overall opportunities of the existing system, including integration of Ask Oregon and We Speak programs
- Support the development of the planned Siskiyou Welcome Center in Ashland.



Expand Travel Oregon Forever Programs

A look back at Oregon’s history shows a state that has been conflicted over its stewardship of Oregon’s amazing timber, water, mineral, and agricultural resources. Oregon now stands as a state that is fully



Travel Oregon produces materials, such as this hotel key card insert, to encourage visitors to donate to the Oregon Travel Philanthropy Fund. Since its inception in mid-2011, Travel Oregon, in partnership with Sustainable Travel International, has donated \$14,000 to statewide projects that enrich the destination.

dedicated to finding a balance between the needs of people and the needs of the environment. Travel and tourism offers a win-win opportunity in that there are clear economic advantages to preserving the natural wonders of Oregon. It is no longer an “either/or” issue; it is a “both/and” issue.

Our commitment to sustainability shows up strongly in the **Travel Oregon Forever** programs. More than 55 million Americans think of themselves as sustainable travelers⁴. **Travel Oregon Forever** programs connect people and businesses with the resources they need to participate in sustainable business practices and further enhance their triple bottom line (people, profit, planet).

Travel Oregon’s Sustainable Business Challenge allows partners to share their sustainability commitment with the world

and our **Oregon Travel Philanthropy Fund** allows visitors to financially contribute directly to local projects. Travel Oregon leads the nation’s tourism efforts in this field simply because it is the right thing to do.

Key Measures for Supporting and Empowering our Partners

Travel Oregon will be successful when our industry partners are engaged and collaborating actively to help Oregon reach its potential as a world class destination. We will be doing our job if people feel confidence, clarity, and momentum. They will see real results showing up at a bottom line level.

We’ll be measuring the local engagement baseline and we will be looking at the utilization of our tools and resources by our partners and travelers.

But really, we will know right away if we are missing the mark. We know our industry partners are smart, and they are not shy. Like we said at the top of this section, we are in communication with our partners all day every day and we treasure that interaction and candor. We sleep well when we have

⁴ Travel Horizons: July 2009, U.S. Travel Association and Ypartnership,

done our very best for the industry. So, “a good night’s sleep” is also a reasonable performance measure.

CHAMPION THE VALUE OF TOURISM

In a world dominated by bad news and pessimism; travel and tourism is a great go-to good news story for Oregon. The data is amazing showing year over year growth statewide. It’s not a fluke, its evidence of a powerful economic engine that can stand side by side with manufacturing, agriculture, education, and health care as a platform for Oregon’s economic future.

Duncan Wyse, President of the Oregon Business Council said this about tourism: “Tourism is a job creator on its own, but it’s also essentially the front door to the rest of the economy.” Here are some quick facts to make the point:

- In 2012, visitors to Oregon spent \$9.2 billion, employing more than 91,000 Oregonians and contributing over \$367 million in tax revenue to the state
- In 2012, tourism contributed \$3.4 billion in GDP, making it one of the top three industries in rural Oregon
- A 2011 research project looking at consumer behavior of Oregon visitors found that 56% of them bought Oregon products once they returned home and nearly 3% said they would be interested in relocating or starting a business here (which equates to over 700,000 folks)

In 2012, tourism contributed \$3.4 billion in GDP, making it one of the top three industries in rural Oregon

Travel Oregon will continue to work with research agencies like Dean Runyan Associates and Longwoods International to bring up to date evidence of the industry’s performance. Data is crucial to our understanding of how the travel industry is maturing in Oregon and how we can better anticipate the market trends and opportunities in the global marketplace.

We will continue with ad accountability studies to understand how our advertising is shaping people’s perceptions of Oregon and driving travel to the state. We will constantly refine our ad spends and messaging strategies to optimize every dollar spent. As we heard throughout our listening tour, “information is golden” for regional markets: we will be taking more steps to call out regional reports and make the relevant data as close to “local” as we possibly can. We will also cooperate with agencies like state parks and fish and wildlife to combine data and analyses to maximize our stewardship and the opportunity for travelers to find the hidden gems in Oregon.

We are discovering that championing the value of travel and tourism can be a challenge. Even armed with great facts and evidence of economic success, there are many who continue to see the industry as a lesser priority to other economic and political demands. This is why the job of telling the story of this plan and the vision of economic impact statewide is up to all of us, just as Governor Kitzhaber is carrying the message to Oregonians and marketplaces in Asia and Europe. For all the momentum that we have,

we can't rest in our efforts to educate local politicians and opinion leaders about the transformative power of tourism.

You need look no farther than the success of our Rural Tourism Studios to see how communities like Oakridge, Oregon have been fundamentally transformed by embracing mountain bikers from around the world. Or how South Lincoln County, a recent Rural Tourism Studio alumni, is actively working now to broaden the travel appeal of its coastal region by creating a local recreation trail system that is both land and ocean based.

We know we need to do a better job of packaging information and "tool kits" that will empower people to speak up for travel and tourism in their communities. We also need to develop and focus on key messaging points that can galvanize the industry. Finally, we will work to support the industry with intelligent advocacy and research on policy positions that could help or hinder the growth of the tourism industry.

Ironically these efforts will often take the form of limiting and summarizing information to what's most important. Through the listening tour we heard that one of the difficulties with Travel Oregon is that there is too much information, too many reports, and the data can be extremely complicated. While we want to keep the transparency and access for those who like to "go deep" in the data (you know who you are), we are also committed to packaging and publishing data in a way that is more locally relevant and actionable.

Travel Oregon's exciting new industry website (Industry.TravelOregon.com) will be the interactive resource that houses the information and toolkits necessary to advance the industry.



Travel Oregon recently launched Industry.TravelOregon.com, a comprehensive resource for tourism professionals featuring research, messaging toolkits, partnership opportunities and more. Please stay in touch and sign up for our industry e-news on the homepage.

Key Measures for Championing the Value of Tourism

We know we will be on the right track when we see industry partners and opinion leaders reaching out to Travel Oregon and utilizing the resources and tool kits we are producing on their behalf. We want to see the research echoed in city council and town hall meetings. We want to hear tourism talking points finding their way into plans and speeches for economic development throughout Oregon. We want to be invited to meetings, debates, and discussions focusing on developing jobs and economic prosperity in Oregon.

We also want to see the earned media impact index increase. We will share the message of our powerful industry with local and regional media, engaging them in storytelling about Oregon's tourism community, and reporting on the positive impact it's having on creating better lives for Oregonians.

RUN AN EFFECTIVE BUSINESS

At a recent meeting with the Oregon Tourism Commissioners the subject came up regarding a recent sales trip to Australia. The commissioner noted, "I came back exhausted. The team from Travel Oregon never stopped. I was there for four days and never saw the ocean." At Travel Oregon, early mornings and late nights are the norm. And, even though Travel Oregon is in the vacation business, there have been times when employees had to be encouraged to "take their vacations."

All you need to do is peek your head in the Travel Oregon offices to see the pace of activity. On the phone, in person, or on location, Travel Oregon employees strive to deliver high energy results. Some say it is the coffee; others say they aren't just doing a job, they're on a mission.

For the upcoming biennium, Travel Oregon will focus on four areas:

- Measure and drive improvement in employee engagement
- Perform strategic portfolio management
- Develop and deliver strategic dashboard
- Develop and begin implementation of technology roadmap

Measure and Drive Improvement in Employee Engagement

Within Travel Oregon there is a lot of talk about "going to the next level." As the agency has found success, they have also found the stakes going up. Oregon has captured the attention of other state tourism programs and is considered a national leader for innovation and world class marketing. As such, Travel Oregon is committed to making sure that team members have the opportunity to develop and learn from formal development programs and coaching sessions—as well as ongoing informal "on the court" coaching.

Perform Strategic Portfolio Management

Like many modern organizations, Travel Oregon recognizes that the world doesn't always work in a way that is consistent with departmental boundaries. As such, Travel Oregon is committed to managing its work along the lines of strategic portfolio management. The nature of this plan is a case in point. Every department will be in action for each of the areas of strategic focus. This will result in the deployment of cross departmental project teams that will come together as needed to optimize results. It is a new way to work, but it is not unfamiliar to the team at Travel Oregon to flow and to adapt to the work and do what is necessary to get the job done right.

Develop and Deliver a Strategic Dashboard

At the recent 2013 Governor's Conference on Tourism, an attendee at a listening session said, "When you ask Travel Oregon a question, you have to be careful because you might just get a fire hose of data for your answer." That comment rang true. Moving forward we believe that the entire industry will benefit from the development of a clear strategic dashboard to show at a glance how Travel Oregon and the industry as a whole is performing.

Just like the dashboard in your car, you want to see important information and you want to trust that information. But you don't want too much information. The dashboard needs to reflect the strategic priorities and indicate not only the discreet performance of a strategic area—but also the trend line associated with the area. We will want to show numbers in the context of trend and expectations and identify key milestones of achievement.

Remember, the plan is dynamic and we need to be ready to adapt and change along the way.

Develop and Begin Implementation of a Technology Road Map

Throughout this plan you have seen references to digital consumer trends that demand 24/7 interaction on mobile devices. At Travel Oregon we see technology as one of our greatest strategic strengths—allowing us to achieve quality and scale. That said, we are aware that the pace of change in the world of digital technology is incredibly fast.

Over the next two years Travel Oregon will produce a technology roadmap that allows us to optimize our current investments in technology and take steps in a market-wise fashion to improve our service quality and efficiency. This plan will take into account the needs of the **Statewide Tourism Master Plan** mentioned earlier as well as the needs of our industry partners. It will ensure that we invest time and money in the hardware and software resources that will take us where we want to go. Getting out in front of technology issues is a critical factor in running an effective business.

Key Measures for Running an Effective Business

Travel Oregon has a history of "gold stars" from third-party auditors. You will frequently hear employees talking about "the highest and best use of resources." This value shows up in smart decision making and unflinching integrity in the management of resources. Travel Oregon will continue to employ the highest

level of business ethics and pay close attention to the details that create an atmosphere of care and professionalism.

Travel Oregon will also continue to participate in the “Top 100 Nonprofits to Work for In Oregon” survey for Oregon Business Magazine. This in-depth survey allows Travel Oregon to get an anonymous, unvarnished look at how their employees feel about their work—and how they compare with other industry leaders. You might guess that our real goal is to be the best nonprofit workplace in the state. That is the way we roll at Travel Oregon.

Conclusion

So that’s it. The story has been cast and the conversation started. Travel Oregon has a clear vision and strong plan in place as we embark on this two-year voyage to inspire explorers. These explorers are global visitors considering Oregon as a travel destination. And they include existing industry partner friends and those we are looking forward to meeting. And, lastly they include our own personal journeys as we work hard to share the inspirational Oregon stories we discover along the way.



Photo credit: Tyler Roemer

2013-15 BIENNIAL BUDGET

Operations	\$3,760,681.00
Global Marketing	\$13,145,253.00
Global Sales	\$3,916,816.00
Destination Development/Industry Services	\$3,867,250.00
Regional Cooperative Marketing Program	\$3,150,000.00
TOTAL	\$27,840,000.00

OREGON TOURISM COMMISSION

Nine commissioners oversee the activities of the Oregon Tourism Commission. The Governor appoints all Commission members with five representing Oregon's lodging industry, three representing the tourism industry at-large and one representing the public-at-large:

Chris Erickson, Chair
Karen Utz, Vice-Chair
Kara Wilson Anglin
Jackie Edmunds-Manz
Hank Hickox
Alana Hughson
Win McCormack
Al Munguia
Ryan Snyder