

STRATEGIC PLAN PROGRESS REPORT

OCTOBER 2019



TRAVEL  OREGON

ABOUT TRAVEL OREGON

The Oregon Tourism Commission (OTC), dba Travel Oregon, is a semi-independent agency that serves as the state's destination management organization. Travel Oregon is focused on building strong, stable communities that welcome a diversity of explorers. A nine-member governor-appointed commission oversees the work of the agency approving the budget and strategic plan. The OTC strives to create a better life for all Oregonians through product and community development, destination sales and marketing, regional investments and matching grants that strengthen the economic impact of the state's \$12.3 billion tourism industry that employs more than 115,000 Oregonians.



MESSAGE FROM CEO



Dear Commissioners,
Welcome to the '19-21 biennium and our new Strategic Plan Progress Report (previously the Travel Oregon Staff Report). Over the past few years, and with the improvement in technology, Travel Oregon has made a concerted effort to highlight Travel Oregon's work

in the most meaningful way: Strategic Plans, Annual Reports, Year in Review reports, Travel Oregon Dashboards, RCTP Dashboards and others. With technological advancements in place, we have been exploring ways of making this report even more impactful, inspiring and informative – and we hope you like the result.

We look forward to our upcoming meeting, October 4-5, 2019 in Cascade Locks, where we have ample community engagement opportunities. Please refer to the full Itinerary for specifics on where to be and when – but highlights include:

- Sunday, Oct. 13 (12:00 p.m.) – Participation in Trailhead Ambassador training and volunteer work shift
- Monday, Oct. 14 (8:00 a.m.) – Pacific Crest Trail hike

Commissioners will be staying at the **Best Western Plus Columbia River Inn** (735 WaNaPa St.) and individual confirmations will be sent to you separately.

The Commission Briefing and Meeting will be held at **The Gorge Pavilion** (395 SW Portage Rd.). Our time together

will be productive and informative as we review, discuss and receive updates regarding the following:

- Proposed 2019-21 Budget Modification
- Research and Indexes
- IPW (international trade show) and the Oregon Road Rally
- Upcoming legislative session
- Columbia Gorge Tourism Alliance Progress
- Fire Impacts in the Gorge
- Travel Oregon Competitive Grants Program
- Only Slightly Exaggerated campaign results
- Travel Oregon Industry site launch

On Monday evening, Oct. 14, starting at 6:30 p.m. we have the opportunity to join local hosts, RDMO partners and Travel Oregon staff for a special dinner on the Columbia River Sternwheeler. Dress for the evening is casual, but make sure you grab a jacket for this cool Oregon fall experience.

We look forward to all that this new biennium holds and continue to be grateful for your service on the Oregon Tourism Commission and to the State of Oregon. See you in the Gorge!

Best regards,

Todd Davidson
CEO

OREGON TOURISM COMMISSION



Chair

Scott Youngblood



Vice Chair

Nigel Francisco



Don Anway



Richard Boyles



Lucinda DiNovo



Maria Ponzi



Mia Sheppard



Kenji Sugahara



Greg Willitts

VISION

A better life for all Oregonians through strong, sustainable local communities that welcome a diversity of explorers.

MISSION

We inspire travel that drives community enhancement and economic development. Through innovation and partnerships, we share the stories of Oregon's people and places, deliver world-class experiences, strengthen the industry, work to ensure all travelers feel welcome and preserve Oregon's way of life and its natural places.

VALUES

EVERGREEN

- *We strive to preserve Oregon's natural beauty with everything we do*
- *We build strength and resiliency for a sustainable future*
- *We balance work and life with our love for Oregon and the people in it*

TRAILBLAZE

- *We lead the way through innovation*
- *We lift each other up while driving forward*
- *We set the bar high and aren't afraid to fail*

TRUE NORTH

- *We take ownership of our work*
- *We honor our commitments*

CANOPY

- *We celebrate and invite diverse cultures, perspectives and voices*
- *We show up for each other and our industry*



EQUITY STATEMENT

Travel Oregon is committed to ensuring our work helps Oregon become a more equitable destination, so all who travel the state can enjoy their journey and feel welcome. Our work aligns with how we value Oregon and its communities, our staff and our industry partners.

We define equity as: when all people have equal access to the same resources to potentially reach the same outcomes. To that end, we want all people to have access to enjoyable travels throughout Oregon.

We are committed to the following shared values:

- Understanding what equity is and acknowledging that not all people have the same starting point.
- Being life-long learners regarding equity and committing to the necessary repair work when we misstep.
- Working to ensure our intent aligns with our impact.

Travel Oregon is growing in our understanding of the myriad intersecting identities people hold and how some identities are rooted in systems of oppression. We aim to remove barriers from all travelers. Addressing equity through an exploration of people's held identities helps us to build a stronger more unified community — a community where we see race, age, ethnicity, sexual orientation, gender, gender identity, gender expression, religion, visible and invisible disabilities, socio-economic status, and all of the intersecting identities therein, and we know that in these differences lies our strength.







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OREGON TOURISM COMMISSION BRIEFING

Monday, October 14, 2019

1:30 – 4:00 p.m.

The Gorge Pavilion
395 SW Portage Rd.
Cascade Locks, OR 97014

Welcome and Introductions

Chair Youngblood

Discussion of Proposed 2019-21 Budget Modification

Jeff Hampton &
Kathleen Stewart

Research Updates -

Destination Management Situational Analysis Tool

Andrew Grossmann &
Ladan Ghahramani

Development of Seasonality Index

Ladan Ghahramani

Transient Lodging Tax Research

Sara Morrissey

Reports, Updates & Discussions

IPW Update

Petra Hackworth

Road Rally Update

Greg Eckhart

Legislative Update

Sara Morrissey & Bill Perry

Other Business

Chair Youngblood

OREGON TOURISM COMMISSION MEETING

Tuesday, October 15, 2019

9:00 a.m. – 12:00 p.m.

The Gorge Pavilion
395 SW Portage Rd.
Cascade Locks, OR 97014

Please sign in if you wish to provide Public Comment or testify under Public Hearing. To accommodate as many contributors as possible please abide by requirements stated on sign-in sheet.

Welcome and Introductions

Chair Youngblood

Local Welcome

Lizzie Keenan

Public Comment

Commission Business

Chair Youngblood

Review of Commission Packets

Chair Remarks

Commission Action

Chair Youngblood

Approval of Minutes

Public Hearing on Proposed 2019-21 Budget Modification

2019-21 Budget Modification Adoption

Reports, Updates & Discussions

Columbia Gorge Tourism Alliance Progress Update

Renee Tkach, Emily Reed,
and David Duncan

Fire Impacts in the Gorge

Stan Hinatsu, Caroline Lipps,
and Nate Stice

Travel Oregon Grants Update

Michelle Woodard

Only Slightly Exaggerated Spring Update/Fall campaign

Bryan Mullaney, Greg Eckhart
and Kevin Wright

Travel Oregon Industry Site Update

Kate Jorgensen & Jamie Porter

Other Business

Chair Youngblood

Adjourn

Chair Youngblood

If you have any questions or comments related to today's proceedings or presentations, please email us at industry@traveloregon.com and indicate "October 2019 Commission Meeting" in the subject line.

Next Tourism Commission Public Meeting – December 9-10, 2019, Florence, Oregon

OPTIMIZE STATEWIDE ECONOMIC IMPACT

Align and optimize Travel Oregon sales, marketing, development and partnership programs and empower the industry to do the same

COMPETITIVE GRANTS PROGRAM

Competitive Small Grants Program

Travel Oregon awarded 30 projects, a total of \$470,996, in Competitive Small Grants funding on September 12, with all the awarded projects to be complete by October of 2020. Funding impacts all seven regions of the state. Travel Oregon received 153 grant applications for over \$2.4 million in funding. Grant dollars awarded will help support worthy projects that will enhance, expand and promote the visitor industry.

View the awardee list.

Competitive Large Grants Program

Oregon21 submitted its Mid-Year Report on June 30. Much of the work thus far has been related to planning and meetings. Marketing and promotional efforts will be a large focus during and after the upcoming 2019 World Championships in Doha. The opportunity for locations across the state to become potential training venues for visiting teams will be a priority between October 2019 and June 2020. The Annual Report is due December 31.

Funders Panel Participation

The Travel Oregon grants team participated in a funders panel session at the Oregon Museums Association Conference in John Day on September 16. Other funders serving on the panel include: Oregon Cultural Trust, Oregon Community Foundation,

Oregon Heritage and Oregon Humanities. Travel Oregon also participated in a pair of funding presentations at the Eastern Oregon Non-Profit Conference in Ontario on September 26. Additional funders include: The Ford Family Foundation, M.J. Murdock Charitable Trust, The Collins Foundation and Oregon Community Foundation. Travel Oregon continues to work to develop greater awareness of its mission and funding priorities with foundations across the state, while also increasing the awareness of grant opportunities for potential applicants.

Facilitate the development of world-class tourism product and experiences with a focus on priority gap areas

PRODUCT DEVELOPMENT AREAS OF STATEWIDE SIGNIFICANCE

Promoting Top Mountain Biking Destinations in Oregon

Travel Oregon identified a gap in the promotion of our state's mountain biking experiences and has been working on an asset identification and promotion project to fill the gap and showcase Oregon as a leading mountain bike destination.

The project team developed a methodology to assess the visitor experience of mountain biking destinations that is based on having at least five days of world-class riding opportunities within 100 miles that are complemented by visitor services like lodging, transportation, bike shops/retail and culture. Using the methodology, we found Ashland, Baker City, Bend, Mt. Hood and Oakridge to be the highest rated mountain



biking destinations in Oregon and curated content for five existing bike routes to promote five days of consecutive riding in the destination using the **Bicycle Ambassador Program** for traveloregon.com.

This fall, Travel Oregon will pilot the social media promotion of the new Ashland and Oakridge mountain bike experiences to assess how the new content can be presented to help to fill the promotional gap we identified. We plan to promote and publish the entire five days in five destinations concept in Spring 2020.

Oregon Food Trails Program Landing Pages on traveloregon.com

Travel Oregon developed an **Oregon Food Trails landing page** that highlights culinary and agritourism trails in Oregon. As part of this effort, four dedicated pages have been created for:

- Wild Rivers Coast Food Trail
- Great Umpqua Food Trail
- East Gorge Food Trail
- South Willamette Valley Food Trail

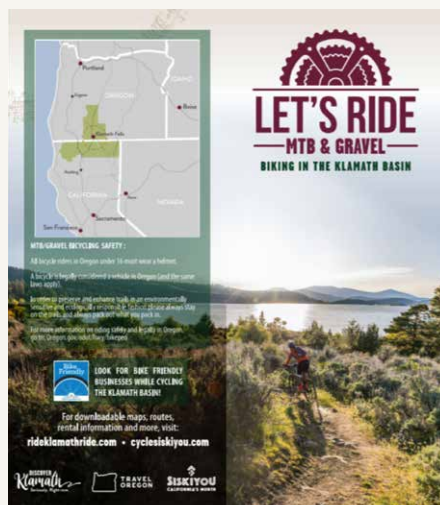
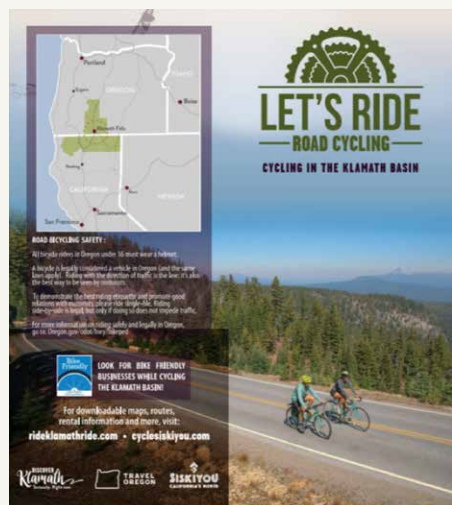
OREGON TOURISM STUDIO ACTION TEAM PROGRESS

Klamath Basin Outdoor Recreation Action Team Update

The Klamath Basin outdoor recreation/bicycle tourism action team has completed the following projects to support the realization of its 15-year vision for tourism:

- **Adventure Cycling Brochure Development:**

The action team developed two brochures that highlight the subregions road cycling, mountain biking and gravel routes. Over 30,000 brochures have been distributed to 12 different visitor centers in the area.



Klamath Basin Cultural Heritage Action Team Update

The Klamath Basin Cultural Heritage action team published a rack card to promote **three audio tours** produced earlier this year. The action team also developed a printed guide for The Modoc War: A Homeland Lost audio tour to enhance the storytelling of the experience.

Greater Tualatin Valley Outdoor Recreation Studio Update

After identifying the curation, promotion and enhancement of adventure cycling routes as a priority during May's outdoor recreation studio, the Greater Tualatin Valley community has completed an extensive bike hub installation project and the development of new cycle routes through the Bicycle Ambassador Program. All new cycle routes are available on the Greater Tualatin Valley **website**.



John Day River Territory Culinary & Agritourism Studio Update

The John Day River Territory has identified the opportunity to develop a farm loop in its destination that will eventually be included into the family of existing farm loops that have been developed through the Eastern Oregon Visitors Association (EOVA). To support this effort, the John Day River Territory community identified an initial set of businesses to include into the upcoming farm loop and develop a draft of what an eventual visitor brochure could look like. The community is excited to see this project come to life during the months ahead.

North Coast Tourism Studio Update

The North Coast Destination Management Network submitted a tourism studio matching grant application to complete the priority impact areas that were identified to support the realization of its 15-year vision. The network has identified the opportunity to encourage responsible visitation by engaging with its visitors about ways to appreciate and respect the North Coast through a trailhead ambassador project (started this summer at Cape Kiwanda, Rockaway Beach and Oswald West State Park) and a stewardship messaging campaign expected to launch in summer 2020. The network also identified the opportunity to increase participation in alternate transportation options during visits to the North Coast. The initial effort for the group was to create a rack card that lists visitor transportation options to, from and within Cannon Beach. The rack cards have been placed at local hotels and Travel Portland's Director's Park Visitor Center.

Tillamook County Culinary & Agritourism Studio Update

The North Coast Food Trail continues to receive accolades, winning Best Foodie Road Trip Editor's Choice Travel Award from Sunset Magazine in August. Review the article in [Sunset Magazine online here](#).

Oregon's Outback Outdoor Recreation Studio Update

The Recreation and Trail action team continues to expand on their "Outback Adventure Trails" concept, developing maps and trails to help improve visitor's connection between Lakeview and the Oregon Timber Trail. As part of this effort, this action team also developed signs and reassurance markers along the Noni Trail System using Oregon Tourism Studio grant funds and in-kind time to initiate the project.



Oregon's Outback Dark Skies Action Team Update

As an outcome of the Oregon Outback Outdoor Recreation Studio, community leaders identified securing the *International Dark-Sky* designation as a priority project for the biennium. This is a global recognition program that works to protect night skies for present and future generations. Travel Southern Oregon, the Studio Action Team and Studio Steering Committee leaders are working on actualizing this designation as a tourism development strategy for the greater Southeast Oregon region.

Southern Oregon Coast Tourism Studio Update

The Oregon Coast Visitors Association (OCVA) worked with Lookout Co. to develop a new brand for the Oregon Coast region. As part of this effort, OCVA worked with Travel Southern Oregon Coast (TSOC) to develop a sub-regional brand for the South Coast that it can use on its public materials moving forward. This is the first brand identity for TSOC.



CAPACITY BUILDING IN OREGON TOURISM STUDIO REGIONS

Resource Assistance for Rural Environments (RARE)

Three RARE positions have been secured for the September 2019-July 2020 service term in Oregon. Details about one additional placement's service term is also being finalized at this time.

The new RARE placements are working with local partners to accomplish destination development outcomes related to efforts stemming from the Oregon Tourism Studio program.

- **Josias Escobedo**

Supervisors: Brad Niva and Bob Hackett, Travel Southern Oregon (TSO)

Location: Rogue Valley (office in Medford)

Oregon Tourism Studio Region: Rogue Valley Culinary & Agritourism Studio

- **Emily Bradley**

Supervisor: Jonathan Wright, City of Reedsport

Location: Lower Umpqua Valley/ Coastal Douglas

Oregon Tourism Studio Region: Southern Oregon Coast Rural Tourism Studio

- **Katie McFall**

Supervisor: Tori Middlestadt, Willamette Valley Visitors Association (WVVA)

Location: Willamette Valley

Oregon Tourism Studio Regions: Willamette Valley River Recreation Studio, Mid-Willamette Valley Culinary & Agritourism Studio

Support high-use destinations to manage the impacts that stem from visitation

VISITOR TRANSPORTATION

Car-Free Landing Page on traveloregon.com

In June, Travel Oregon published a car-free itinerary landing page that compiles 10 car-free itineraries throughout Oregon that have been developed since 2017. The updated landing page also highlights the results of the Columbia Gorge Tourism Alliance's Columbia Gorge Car Free website.

DEVELOP A BASELINE OF DESTINATION MANAGEMENT NEEDS IN OREGON

With the support of Ecotrust's mapping team, Travel Oregon completed an initial version of the tool it will use to monitor its key measure of developing a baseline for destination managements in the 19-21 Strategic Plan. Through the tool, Travel Oregon can now view results from industry engagement and residential sentiment studies on a map of Oregon that is broken down by zip code to better visual where priorities are being voiced. Development of the tool has led to the creation of more consistent processes to solicit feedback on Oregon's tourism industry to support future data collection and interpretation about the evolving needs of our state's tourism industry.

INDUSTRY LEARNINGS

2019 World Tourism Day Forum

On September 27, VP of Destination Development, Kristin Dahl, spoke at the World Tourism Day Forum in Washington D.C. Focused on the emerging concept of Impact Tourism, Kristin joined a panel of other destinations that have been leading the way in leveraging tourism's potential for improving the quality of destinations around the world.

Inspire overnight leisure travel from key markets

SPRING 2019 FINAL CAMPAIGN RESULTS (APRIL 5 – MAY 31)

The "Only Slightly Exaggerated" (OSE) campaign launched on April 5 using animation to inspire travelers to come find happiness off-the-beaten-path, all over Oregon. We created a 1:45 second hero video (hero), one :90 second (s), one :30s, two :15s cutdowns and nine :06s cutdowns (including the seven from 2018) which were utilized through our owned, earned and paid channels. By the end of the campaign, we were up more than 36% in overall website sessions, and drove more than 183.3 million impressions across paid, social and earned media. These numbers, and the over-delivery in almost every media category, reinforced the belief that compelling creative drives strong results on all platforms.

Paid Media Results Overview

The spring campaign results continued the success seen from previous OSE campaigns. The spring 2018 OSE campaign was our most successful campaign to date, setting records for social, web traffic, and PR stories. Keeping that in mind when comparing results, below is a recap of performance by channel:

- **Digital Video:** Premium digital video generated 16.2 million video views (up 51% over last spring) with a video completion rate (VCR) of 78%, which was 3% higher than industry benchmark¹, and 17% below last year's spring campaign.
- **Custom content:**
 - The **Chefsfeed** partnership generated an engagement (comments and likes) rate of 3.2%, which was 167% greater than benchmark.
 - Atlas Obscura's **custom Oregon map** generated an engagement rate of 1.3%, which was 42% below benchmark.
- **Online Travel Agent (OTA) partnerships:**
 - On Sojern, we earned 3.7 million views with an 83% VCR, which was over benchmark by 11% and below last year's VCR by 16%.
 - The TripAdvisor buy showed a VCR of 55%, which was 26% below its benchmark. The click-through rate (CTR) for the buy, at 0.11%, was 6% above its benchmark, but was 8% below last campaign's CTR.
- **TV:** Delivered 56 million impressions across broadcast and cable programming due to hit shows like The Voice, American Idol and local sports coverage. This buy over-delivered² by 18% (equivalent to \$122,000).
- **Cinema:** Over-delivered by 14% for a total of 2.4 million impressions. This equates to an added value of \$19,000. For comparison, this year we received a similar amount of impressions over last year with a 45% decrease in spend.
- **Out-of-Home (OOH):** Over-delivered impressions by 75% for a total of 87.5 million impressions (the over-delivery was equivalent to a spend of \$254,765). For comparison, year over year (YOY) represents a 25% increase in impressions with a 23% decrease in spend.
- **Paid search:** Continued to be a consistent and cost-effective traffic driver. With an increase in spend of 44%, we saw a 66% increase in clicks to traveloregon.com with a cost per click that was 13%

lower than the previous year. On top of that, visitors from paid search showed increased engagement based on a 46% increase in pages per session YOY.

• Adara³

- Digital media drove \$3.8 million in hotel revenue via 17,806 hotel bookings
- Hotel revenue is up 147% YOY
- Hotel bookings are up 137% YOY
- Cost per booking was down 67%

Note: Adara captures roughly 54% of hotel rooms in the state so these are minimum levels of revenue and spend.

Key Learnings – Paid Media:

- Focusing on the four key niche qualities of the Active Adventurer (action seeker, animal lover, nature wanderer and foodie-focused) allowed us to hone digital video targeting and tailor custom content partnerships. This strategy successfully led to click throughs to traveloregon.com and strong engagement rates. Moving forward, media shall work in tandem with Travel Oregon's content team to drive further on-site engagement.
- Cinema and OOH consistently provide visually relevant high impact spaces for the OSE message. By prioritizing key releases and high trafficked units, both tactics significantly over-delivered on planned impressions, making them efficient drivers of mass awareness.
- We also showed that we can continue to increase the spend of paid search without negatively affecting the cost per click or engagement. This is a channel we can invest more heavily in going forward.

Social Results Overview Video:

- We spent 22% more on video units (compared to last spring) and generated 5.7 million views across Facebook, Instagram and Twitter. This represents a 184% increase in paid views compared to last spring.
- We maintained efficient delivery with a cost-per-view (CPV) across both the hero and the cut-down video units at around \$0.01.
- The strategic release of the 1:45 hero video first followed by the :06s and 0:15s videos throughout the campaign made the shorter videos more familiar to our audience and maintained our low CPVs for the shorter videos.
- On Twitter, the hero video performed the best

¹ Industry benchmarks are determined by the Interactive Advertising Bureau (IAB). They use field studies to determine industry-wide measurement guidelines across a variety of digital channels including digital video, viewability, impressions, and more.

² Over-delivery occurs when we get more impressions delivered than what the partner originally outlined to us during the buy. These are bonus impressions we do not have to pay for.

³ Adara is a 3rd party attribution partner. By placing tracking pixels on our digital ads, Adara can tell us who has seen one of our ads and then actually booked a trip to Oregon due to relationships it has with various OTAs, hotels and airlines.

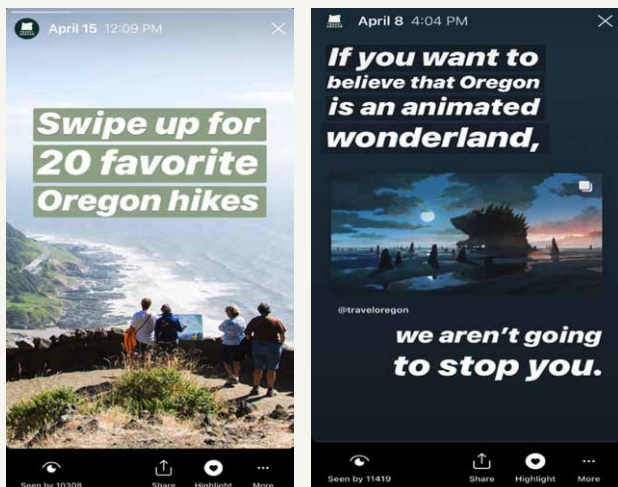
with 1,188,212 total views from paid and organic and 21,056 total engagements. On average people watched 50% of the video on Twitter, compared our average of 47.3%.

- The Facebook hero video had 1,105,303 total views from paid and organic and the most engagements per video with 41,239.
- Of the :06s and :15s videos, the Dunes and Hiking videos performed best (in terms of views).

Ad Unit	Views	Goal	Cost Per View (CPV)
1:45s hero	2,863,176	500,000	\$0.015
:15s + :06s Spots	2,833,202	600,000	\$0.01

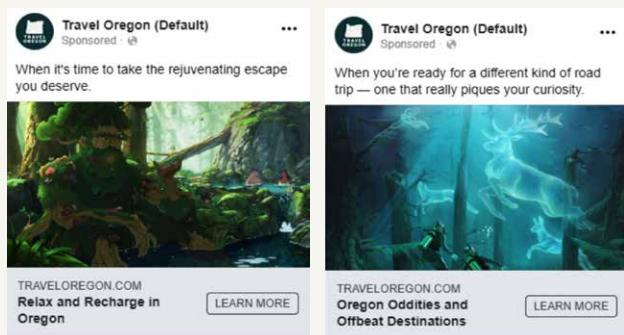
Instagram Stories:

- We ran 18 Instagram stories featuring the campaign creative to drive traffic to traveloregon.com.
- These stories generated 4,287 clicks to the website and 270,133 impressions.



Click Ads:

- We spent 15% more on click ads YOY and generated 174,595 clicks to the website (a 153% increase in paid clicks compared to last spring).
- On Facebook, the Hot Springs article received the most clicks and highest level of engagements. This was consistent with social trends we have observed



where natural landmarks, such as hot springs, are popular on Instagram. This post gained a lot of attention not only with clicks but also with the highest level of engagements.

- The Clear Lake image received the highest number of website clicks for the Twitter articles with 6,231. This resulted in the lowest cost-per-click (CPC) out of all articles at \$0.05.

Ad Unit	Clicks	Goal	Cost Per Click (CPC)
Website traffic ads	159,251	121,000	\$0.53
Sweepstakes ad	15,708	9,000	\$0.20

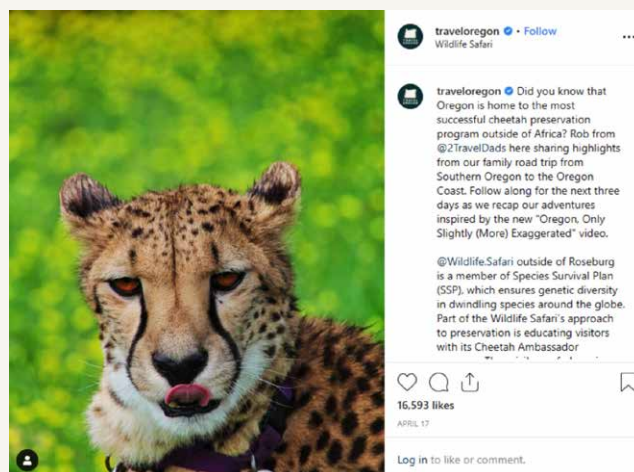
Stickers and GIFs:

- The **Travel Oregon Instagram story stickers** (GIFs⁴ designed for Instagram) have generated 1,730,547 impressions based on consumers, Travel Oregon, or partners using them in Instagram Stories. The top performing sticker was the Dinner Selection Sticker, where the restaurant waiter is swinging around the different selections of foods available, including a bottle of Oregon Solidarity wine. This sticker was viewed 737,668 times.
- GIFs have generated 663,824 impressions. Twitter is a natural fit to use GIFs in either posted content or as fun responses to questions or statements from the audience. From the 12 tweets that were published using the OSE GIFs, there were 4,897 total views, 227 engagements and 28,484 impressions.

Influencers:

Influencer efforts generated 1.8 million impressions on Instagram and Facebook for the OSE campaign.

We did four influencer trips, compared to 14 influencer trips last year. The smaller number of trips across multiple regions allowed each influencer to spend more time in the state and created a natural, slower travel experience. This slower pace allowed



⁴GIFs are an animated feature that can be used on social platforms using assets uploaded to Giphy.

the audience to get to know each influencer better and delight in their discoveries across Oregon. Not surprisingly, the inclusion of animals in each trip was a hit that elevated the trips even more.

- The cheetah photo by @2traveldads from the Wildlife Safari became the most engaged piece of influencer content with 32,517 engagements. We typically receive an average of 4,733 engagements per post.
- Elena of @findmeoutside traveled with her dogs and featured them throughout her Instagram grid posts, stories and website article. Her article performed the best with 1,155 clicks on Twitter.
- @foodbellyPDX's photo of the alpacas at the Marquam Hill Ranch was the first alpaca photo to make an appearance on the account feed (which often features dogs and wildlife) in several years. It was a hit with 11,417 engagements, placing it within the top five performing influencer posts for this campaign.



In addition, story content that includes unique places of interest such as Clear Lake and alternative lodging experiences, like lookout towers, performed better than stories that covered better known areas. This is not surprising, considering that folks on social are always on the hunt for “almost-secret” locations for inspiration. This will be a trend we will investigate in the future as we look to promote lesser-known destinations.

Key Learnings from Social Media:

- The average view time for the 1:45s video was 18.51%; which was much higher than the average view time of 8.64% for last year's :90s video.
- We saw lower overall organic performance of the hero spot in terms of reach and video views. While part of this was attributed to the continually declining organic reach on Facebook, there was also less buzz socially as this was the second year of the campaign.

- Instagram stickers provided exceptional organic reach, driven by the strong creative tie to the campaign spot and usage of Instagram stories.
- Engaging fewer influencers for more in-depth takeovers provided a deeper connection for our audience. The addition of the follow up article enables the content from the Influencer program to have a longer lifespan as a story on traveloregon.com.
- Paid search ads were slightly more expensive than previous campaigns, which is a result of the gradual increase of cost to run traffic content on Facebook.
- Twitter ads were mixed in terms of performance. While Twitter outperformed in terms of watch time for the hero video (50%) and engagement with GIFs, Facebook is still the leader in driving consumers to deeper content on traveloregon.com.
- Our CPV across all video units was on target, at an average of \$0.01 per view. This is in line with our costs from last spring.

Traveloregon.com and Content:

The goal of the **campaign landing page** on traveloregon.com was to immerse audiences in the experiences showcased by the OSE video and bring the magic of Oregon to life through real things to do and places to go in Oregon. Overall sessions, pageviews and pages per session were up significantly over last spring.

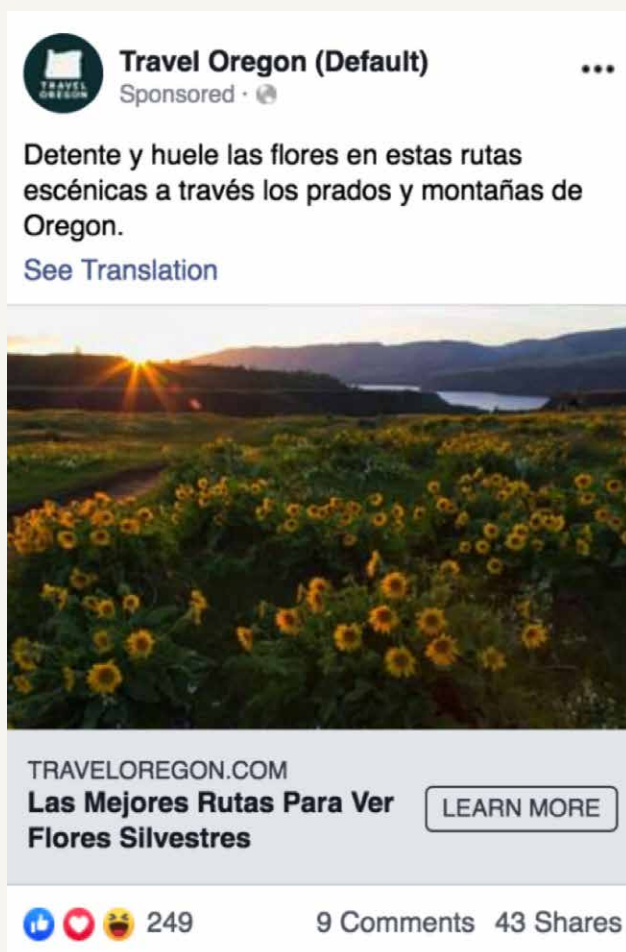
The hub featured nine subpages and 56 new and updated stories. In contrast to last year's campaign web design, which split content by regions, we grouped assets by activity themes and incorporated niches that over-indexed against our Active Adventurer target audience in pet travel, action sports and local food. This allowed more flexibility in storytelling and connected regions to additional parts of the creative. The most popular subpage was “Oregon Oddities,” showcasing offbeat attractions across the state, while the new hot springs and pet-friendly hotels stories received significant web traffic.

YoY - All Users	2019	2018	Change
	4/5 - 5/30	3/12 - 5/6	
Number of sessions	969,552	715,068	35.6%
Number of users	738,742	547,497	34.9%
Pageviews	4,318,977	2,632,527	64.1%
Pages/Session	4.45	3.68	20.9%
Avg Session Duration	2:08	2:09	-0.8%
% New Sessions	71.6%	72.0%	-0.5%

- Overall sessions, pageviews and pages per session were up for the duration of the campaign.
- Traffic to the hub page was approximately 2% of overall traffic (by pageviews), which was significantly lower than last spring (11%), due to a larger percentage of paid clicks to deeper content and organic traffic being up significantly this year.
- 21% of visitors to the hub page scrolled down 75% of the page to view content; this was in-line with last spring with 25% of hub visitors scrolling at least 75%.
- 33% of hub page visitors clicked for deeper content; this was lower than last spring with 41% of visitors clicking for more content. These numbers were anticipated due to social driving traffic deeper into related Trip Ideas instead of the campaign hub or thematic hub pages.

Spanish Content

In order to more effectively reach Spanish-speaking audiences, we published **content in Spanish** on traveloregon.com. The content was created in partnership with Vive NW and former OPB journalist Roxy De La Torre. The campaign targeted a subset of our Active Adventurer target that uses Spanish as their



primary language, with the goal of inspiring them to find joy in Oregon's outdoor spaces. The content was well received and drove more than 23,000 clicks to the in a two-week period at a CPC of \$0.38, which was more efficient than the standard campaign content.

While we maintain a Spanish language site that caters to the Mexico market via traveloregon.mx and publish a Spanish language print guide promoting scenic byways with ODOT, this was the first time we created digital content for domestic Spanish-speaking audiences.

Sweepstakes

The Spring email sweepstakes ran from May 24 – June 10 and drove new subscribers to sign up for the Outdoor e-news list. We brought on Oregon-based partner Rumpl to expand our reach and equip the winner with gear. We captured the following during the sweepstakes promotion period:

- 24,560 unique sweepstakes entries
- 2,619 new email subscribers (10.66% conversion rate)

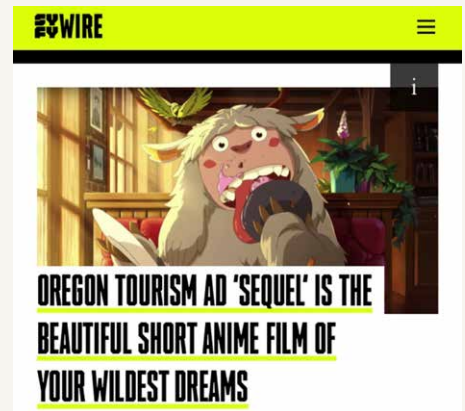


Public Relations

In total, the Communications team garnered 41 stories with a circulation of 113.6 million and an average story of 9/10 for the spring 2019 campaign.

Comparatively, last year's launch of OSE garnered 141 stories with a circulation of 456 million and average score of 8.3/10, while spring 2017 (Travel Oregon salmon) garnered 9 stories, a circulation of 130 million and an average score of 9.2/10.

The differential in number of stories YOY clearly indicates the viral nature of the 2018 OSE campaign. And while this year's OSE coverage did not see the same numbers as last year, the story score increased from 8.33 to 9, which signified the "quality" of stories improved (coverage included quotes from a Travel Oregon spokesperson, ability to click to traveloregon.com, etc.) Some of the top coverage: **The Oregonian**, **AdWeek.com** and **Syfy.com**.



Media Launch Day at Wieden+Kennedy (WK)

On Friday, April 5 we held a media day at WK where local media were invited to get an exclusive first look of the new video. The media day was successful with KPTV, KOIN and KGW all attending and producing positive news stories later that evening. In addition to broadcast coverage, numerous newspapers and online outlets covered the launch as well.

Los Angeles/San Francisco Desksides

In May, the Communications team traveled to Los Angeles and San Francisco to meet with top tier media and share OSE-inspired story ideas with a graphic map depicting noteworthy locations across the state. Several writers have expressed interest in coming to Oregon, a goal of these trips. We expect to see coverage results in the coming months from this tour. Publications we met with included: *Los Angeles Times*, *USA Today*, *Chicago Tribune*, *Lonely Planet* and *Travel + Leisure* to name a few.

Key Takeaways

- We received interest from local and national media, yet it's no surprise that the initial launch of OSE in 2018 garnered significantly more coverage. We knew we were up against a challenge to reach the same numbers as year one, as is often the case in second-year campaigns.
- Launching a campaign or sending press releases on a Friday can be challenging. For future campaigns, we will hold a media event at least two days ahead of the advertising-buy if launch takes place during the weekend.

Industry Outreach

The OSE Campaign Toolkit was available to partners on industry.traveloregon.com offering new creative including videos, style guide, media plans and photos for them to leverage the campaign locally.

The campaign and toolkit were shared with the industry through the general industry newsletter on March 22 and reached 4,548 industry contacts.

FALL 2019 CAMPAIGN

This fall, we will continue to build on the success of our OSE campaign as a way of inspiring people to find happiness in Oregon. Our primary target will be Portland, with secondary targets of Seattle, Boise, Eugene and Bend. We will leverage the OSE campaign creative by developing an illustrated story of Yeti and Squatch. The story will follow these characters, which were featured in previous OSE campaigns, as they participate in exciting winter activities throughout Oregon.

The campaign will launch October 15 and run paid media through December. Travel Oregon, in partnership with regional partners, developed activities and locations to feature in the creative. Content will roll out each week, focusing on a specific region and a unique winter activity. The weekly content will culminate with the creation of a digital and physical story book.

We will target the "Winter Wanderer," which is a subset of our "Active Adventurer." Characteristics of "Winter Wanderer" are prioritizing adventure, hiking all year round, dining out more than most, and having an appreciation for Oregon bounty and local products.

The campaign will leverage print, OOH, digital content and social media to drive consumers to view the story on traveloregon.com, pre-order the book, and inspire them to experience Oregon's winter season.

Our next steps are to finalize the regional creative and written story for the book. We will then focus on the weekly launch of regional assets and regional portions of the story. Lastly, we will release a physical book in early December and celebrate with a reading at Powell's Books on December 7.

DIGITAL CONSUMER PLATFORMS

Traveloregon.com



Q4

Led primarily by the spring campaign and the resurgence in organic search, Q4 traffic to traveloregon.com was up 31.1% compared to the same period last year. Engagement trends held up well with pageviews up 46% and session duration down 4.6%. Most significantly, this quarter, saw two consecutive months of record-breaking website traffic (591,833 and 608,631 in May and June, respectively). Prior to May, the last time we reached more than 500,000 web sessions in a single month was June 2016.

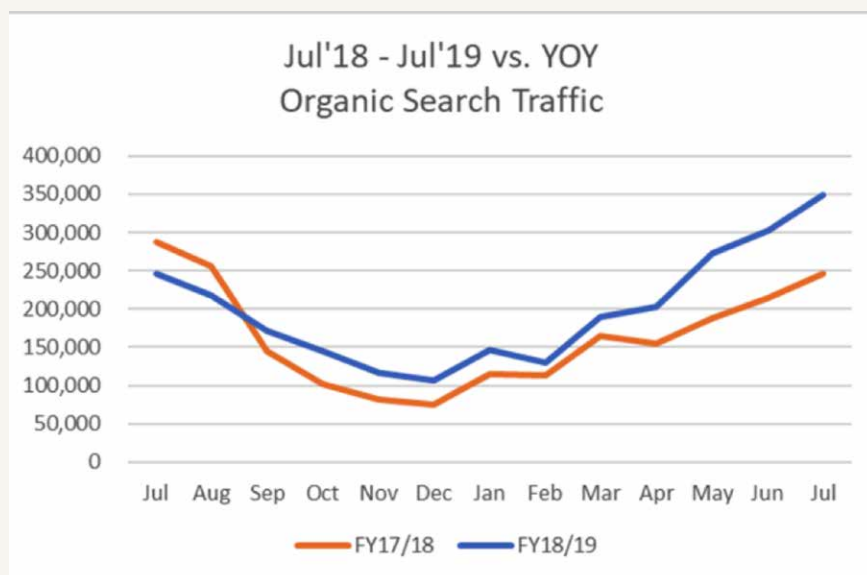
The big story this year was that traffic from organic search, (the largest source of traffic to traveloregon.com) and social were up 18% and 59%, respectively, compared to last year. These two channels alone provided us with nearly 72% of all traffic (52.8% from organic and 18.9% from social).

When we look at organic search since September 2018, we had remarkable growth. Since that point, we've had 463,000 additional web sessions from organic search to traveloregon.com. From a value standpoint, this increase in traffic is worth \$264,000⁶.

Annual

For FY 18-19, we closed out the year strong with a 6.1% bump in traffic to close at a record-breaking 4.25 million sessions (exceeding our goal of 3.62 million sessions). Pageviews were down 27%⁵ and time on site was up 42%.

While this additional value can be partially attributed to the Travel Oregon: The Game and OSE campaigns, a lot of this success is the result of work the Marketing Services and Integrated Marketing teams did with Miles Partnership to meticulously monitor and address both technical and content priorities quarterly.



⁵ This was expected because the percentage of traffic from Travel Oregon: The Game, (which by design drives Pageviews) is much lower in FY2018/19.

⁶ Based on pay-per-click pricing for the traffic.

Traveloregon.com Platform Updates:

Q4 was focused on supporting the launch of the new **industry website** and addressing the maintenance backlog. There were two notable enhancements rolled out:

- The Ashland Welcome Center (AWC) Wi-Fi Landing Page: The new welcome center to provides complimentary Wi-Fi to visiting guests. This presents an opportunity to connect with visitors and provide geographically relevant trip-planning ideas and information. The team then created a new template using the existing region template as a foundation creating a highly customizable, branded experience that can be leveraged by (and curated for) any welcome center in the future. You can see the AWC landing page by keyword searching “Ashland Welcome Center” on traveloregon.com or by clicking [here](#).
- Maps on Trip Ideas: A new Trip Idea template was developed, enabling the content team to showcase points of interest within the context of an interactive map. This enhancement is important because it provides visitors with geographic context, further aiding in trip planning. You can see an example of the new Trip Idea template by keyword searching “South Willamette Valley Food Trail” on traveloregon.com or by going [here](#).

Q4

Overall social engagement remained strong with social reach up 142%. This was driven primarily by the spring campaign launch and its associated content.

The overarching social plan this quarter was to support the OSE campaign by driving video views, clicks to relevant content and engagement via campaign creative and content. In addition, the increased use of Instagram stories and Spanish content also boosted social engagement and traffic this quarter.

Annual

Overall, social reach was up 1.2% for FY 18-19. While algorithm tweaks and privacy concerns made reach and engagement metrics unpredictable, Instagram and Twitter showed strong engagement.

As we work to review metrics, we are tracking measurables that are deemed important and ones we can control (clicks to traveloregon.com, content engagement, video views, etc.).

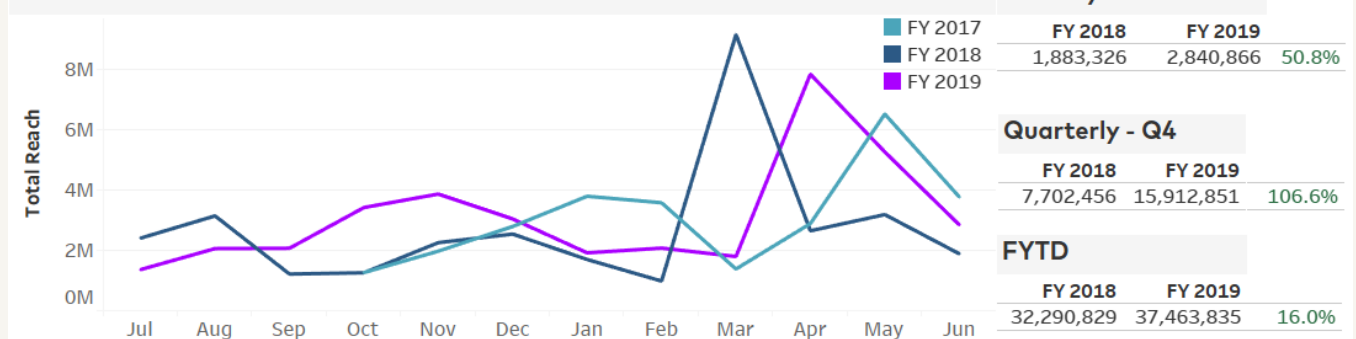
In Q4 we experimented with original content using Instagram’s new quiz functionality in stories. In April, we launched a multi-day series titled “Local Lingo,” inspired by a feature in our 2016-17 Visitor Guide. Replicating a quiz-show format, this **Instagram series** was produced over a single afternoon and shot interview style, where people on the street were asked to pronounce Oregon locations such as The Dalles, Yachats, Heceta, Willows and the infamously mispronounced Willamette Valley. The final product included gameshow-style graphics and sounds and was released in two parts on April 1 and 2 – boosting Instagram engagement before spring campaign launch.

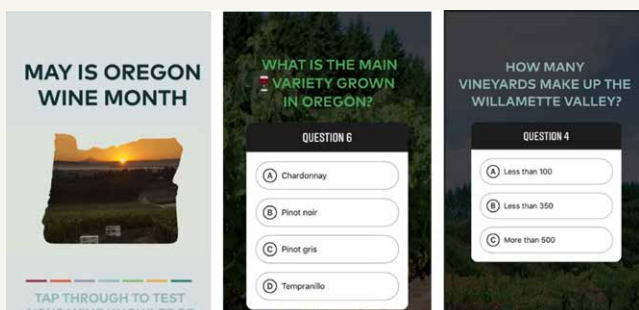
“Local Lingo” was highly engaging, generating more than 123,312 impressions with 60% of viewers completing the entire story. Our average retention rate was above 50%.



Social Media

Social Reach Trend





In May, we continued the experimentation with a wine quiz in support of Oregon Wine Month. Produced with input from Oregon Wine Board, this Instagram story incorporated poll features to test and educate our audience on various aspects of Oregon wine. Questions started easy and then became more difficult. As predicted, we saw a significant drop in audience retention and viewership as the difficulty increased.

The wine quiz had a retention rate of 58% and was a great learning experience in testing a more educational style video compared to the informational and inspirational ones we typically post. It is noteworthy, however, that 8,894 viewers completed the 10-question quiz!

Q4

The Outdoor list saw strong gains with subscribers up 55% YOY. The Culinary and General lists saw YOY decreases in subscribers, 19% and 54%, respectively. Engagement for the quarter was strong for all three lists. This continued to be the trend as we maintained a more active audience. Open and click-through rates all beat YOY numbers except for the culinary click-through rate, which was the only engagement metric down for the quarter.

Email Marketing

Travel Oregon's consumer email marketing programs were identified as a key initiative for FY 18-19. The email

programs allow for ongoing communication with potential travelers to keep Oregon top of mind.

Annual

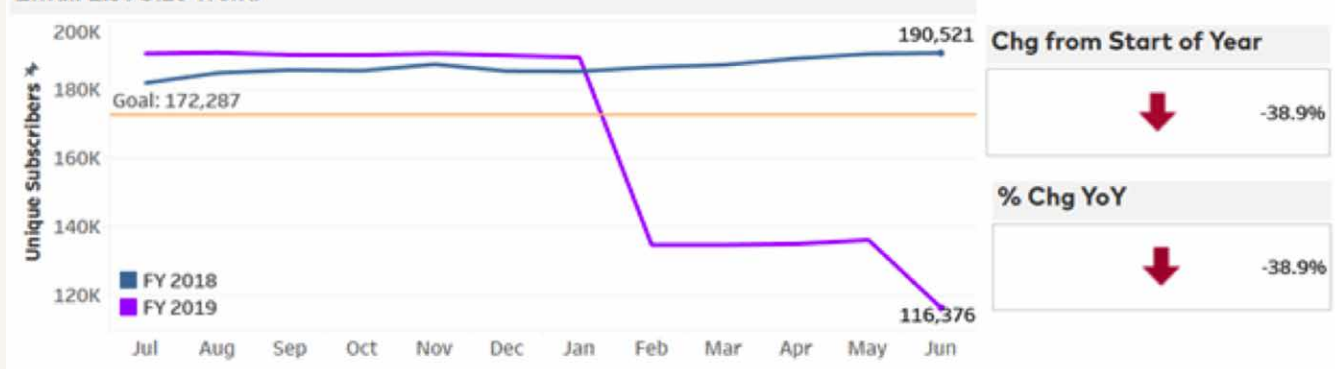
We anticipated a decrease in subscribers due to the upcoming regulations from General Data Protection Regulation (GDPR) which force us to remove certain unidentifiable subscribers within our database. Ahead of the scheduled data cleanse related to GDPR in June, we performed necessary list cleansing maintenance in February to help improve our email deliverability. While the cleanse in February removed more subscribers than originally planned, it was the best action because these subscribers were no longer engaging with our emails and were hurting our deliverability and sender score. We removed the remaining subscribers associated with GDPR in June. Now that we have Marketo, it will allow us to perform list cleansing maintenance on an ongoing basis to avoid large one-off purges in subscribers, maintain a more engaged email database and improve email deliverability.

We ended the year with 116,376 subscribers across all three email lists. This was a 38.9% drop in subscribers for the fiscal year. However, with these purges, we increased our active subscribers⁷ from 55% to 78.8% YOY. For FY 19-20, we are prioritizing email acquisition as one of our top goals.

Email open and click rates were strong and are above general travel and publishing industry standards⁸.

Email	Open Rate Goal	Actual Open Rate (average)	Click Rate Goal	Actual Click Rate (average)
Core	17.9%	22%	19.7%	19%
Culinary	22.6%	29%	23%	19%
Outdoor	23.5%	29%	24.4%	23%

Email List Size Trend



⁷Active subscriber – defined as having opened an email within the last 6 months or clicked on an email within the last 12 months.

⁸Travel Industry Open Rate 20.03%; Click Rate 2%; Media & Publishing, Open Rate, 21.92%; Click Rate 4.55% via [Mailchimp 2019 Benchmarks](#)

PUBLISHING & CONTENT

Revenue Update:

FY 18-19 was a record year for our publishing program. We closed the year after generating nearly \$806,000 in sales, which was 2.6% above our goal of \$785,400 and 9% above sales from FY 17-18. Highlights from our publishing program this fiscal are:

- For the first time ever, the 2019-20 Visitor Guide generated over a half-million in ad revenue dollars and still accounts for more than 60% of total revenue.
- Increased digital products and increased sales have resulted in a 13% decrease in costs while expanding the scale and scope of content produced.
- Travel Oregon's portion of the revenue share saw a 27% increase from FY 17-18
- On the digital side, our email products and sponsored content program, Your Story Everywhere (YSE)⁹, continued to be popular with partners. Consider:
 - YSE revenue has doubled since it debuted in FY 16-17 and was 11% above our revenue goal.
 - YSE stories garner higher than average time spent; additionally, some advertisers have mentioned seeing direct bookings from these sponsored products.
 - Our email program is one of the first products to sell out annually. Click rates for ads garnered an astounding average of 3.5%¹⁰.

Q4 update:

We produced, published and distributed 86 stories in Q4. The publishing lineup included:

- 20 news stories designed to keep Oregon top of mind with content related to three-month booking timeframe.
- 6 seasonal features that took a long-form approach to storytelling, prompting an emotional desire to travel to Oregon.
- 9 thematic story collections (featuring 40+ stories) to support the spring campaign.
- 10 Spanish-language stories as part of spring campaign and diversity, equity and inclusion (DEI) efforts.
- 8 cycling-focused stories that promoted the Oregon Timber Trail, Cycle Oregon, Oregon Scenic Bikeways' 10-year anniversary and ride events.

- 24 special project stories produced to support special partner requests and/or specific partner events, including 11 sponsored stories.

Summer seasonal features included an exploration into **Northeast Oregon's indigenous cultures**, a round-up of bike-friendly lodging along **Oregon Scenic Bikeways**, a wine lover's itinerary of **tempranillo in the Umpqua Valley**, a look into **Woodburn's Mexican heritage and celebrations**, a guide to paddling the **Lower Columbia River Water Trail**, a video feature of pro runner **Lauren Fleshman**, and a collection of **car-free getaways in Oregon** in preparation of increased visitation.

#OregonMade Grant Update

The first film funded by our partnership with Oregon Film and the #OregonMade Foundation premiered on May 20 at a packed theater at the Portland Art Museum. *Our Trails Too* tells the story of Mercy, a queer African American woman, who is on a journey to transform our state into a recreation hub for people of color. The film is currently being pitched to film festivals regionally and was shown at the Portland Eco Film Fest on September 26.



This film was part of our partnership with Oregon Film to support local filmmakers/content creators who are producing innovative content about Oregon that inspires travel to or around the state.

The program is administered through the #OregonMade Foundation, not Travel Oregon's grant program. The grants are offered quarterly and focus on different themes that support Travel Oregon marketing objectives. The three other films currently in the works are:

- Oregon Winter: Two short films celebrating the magic of Oregon's winter (release date in fall 2019).

⁹Your Story Everywhere (YSE) is a program offered by Travel Oregon that allows partners to purchase a custom-produced story on TravelOregon.com that is promoted through a media buy on Facebook.

¹⁰Consider that in Q4, across all ad formats and placements display ad CTR is just 0.05%. <https://www.smartinsights.com/internet-advertising/internet-advertising-analytics/display-advertising-clickthrough-rates/>

- **Diversity in the Outdoors:** Tells the story of two women, Aly Nichlas and Analise Cleopatra, who cycle 325 miles across Oregon's desert and forest trails (release date TBD).
- **Outdoors & Health:** "Teens in Trees" follows three urban adolescents from Portland as they ditch their devices and adventure offline into Opal Creek Wilderness' old growth forest to spend the night high in a tree canopy (release date in December 2019).

This content partnership will be renewed in FY 19-20. For this fiscal year, we're focusing on creating two more adventure films, a film based on a specific niche and several experimental shorts designed to be used across social.

Scenic Byways Update:

We reprinted the current version of the Scenic Byways guide in French, German, Chinese and English this quarter. As stated in past reports, this is part of a longstanding partnership with Oregon Department of Transportation (ODOT) and allows us to focus on creating educational and inspirational content and allows ODOT fulfill its obligation of providing travelers navigable information on Oregon's roadways. For this partnership, ODOT contributed nearly \$200,000 in production support.

Other content highlights include:

- 10 new stories to support spring campaign, including four related to social media influencer trips themed on **pet travel**, **culinary interests**, **ambitious adventures** and **family fun** featuring an LGBTQ blended family
- 2 stories to mark National Travel & Tourism Week relating to this year's "**Travel Matters**" and "**Made in America**" themes
- 2 stories about accessible outdoor recreation, featuring **ADA-friendly trails** and **guided adaptive sports**

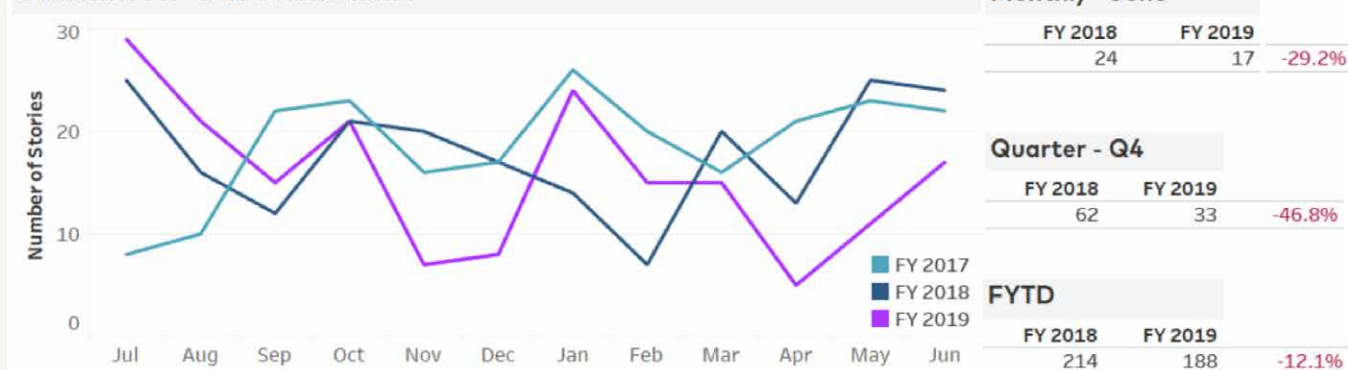
- Continued partnership with Ski Oregon highlighting seasonal offerings, such as **ski and snowboard camps** on Mt. Hood, **spring skiing**, a variety of **summer ski area activities** and **mountain biking opportunities**, as well as a spotlight on legendary surfer and snowboarder **Gerry Lopez**
- Annual partnership with Oregon Wine Board for Oregon Wine Month that included an updated story about **biodynamic wineries**, Facebook click ads, Instagram Story quiz, and a feature in the Alexa wine activation
- Offering beginner tips with a first-timer's guide to **Steens Mountain**, an **airport roundup**, information about **crabbing and clamming clinics**, and how to book a **last-minute camping trip** at Oregon State Parks
- Increased efforts to use Instagram Stories to distribute website content, from **spring campaign stories** to highlighting **seasonal trip ideas and upcoming events**
- Sharing wildfire prevention messages, such as **campfire tips**, around key holiday weekends on Facebook and **Instagram**.

CONSUMER COMMUNICATIONS

Q4

In Q4, the Communications team garnered 33 stories with a circulation of 364.8 million and an average story score of 8.4/10. Comparatively, during Q4 last year, we garnered 62 stories with a circulation of 358.6 million and an average story score of 8. We are pleased that our story score and circulation improved, signifying a higher number of top-tier publications, Oregon feature stories and links to traveloregon.com. Story count was down due to Q4 FY 17-18 yielding more reactive media requests and immediate results from our NYC media tour.

Consumer PR - # of Stories Trend



Annual

Overall for FY 18-19, we secured 188 consumer stories with a circulation of 1.16 billion and average story score of 8.34/10. For comparison, in FY 17-18 where we garnered 214 stories with a circulation of 1.2 billion and story score of 8.3. As we close out the fiscal year, we are pleased to have met internal goals, although we were just shy of matching last year's numbers for circulation and number of stories. Earned media coverage helps us fulfill the Strategic Plan imperatives of Championing the Value of Tourism and Optimizing Statewide Impact by highlighting Oregon as a vacation destination.

Coverage Highlights

Note: [View all Q4 consumer coverage](#)



Oregon Media Marketplace

On June 27, the Communications team, in partnership with Travel Portland's PR team, hosted the inaugural Oregon Media Marketplace at Plaza del Toro in SE Portland. The purpose of this event was to connect top local freelancers and journalists with our RDMO partners through one-on-one meetings to share ideas and establish relationships. A networking reception followed the marketplace, featuring appetizers, music and Oregon wine (including Oregon Solidarity Rosé) and craft beer.

Overall, the media marketplace was a huge success with 45 media attending and participation from all seven RDMOs. It was a mutually beneficial outcome for everyone involved. Our partners were able to establish new relationships with media, and the media received new story ideas and contacts for future references. We were thrilled with the outcome and heard wonderful feedback from both our partners and the media who attended. Our hope is to make this a biannual event.

MARKETING INSIGHTS & VISITOR SERVICES

Research

Traveloregon.com Website User Study:

This survey on traveloregon.com started in January 2019 and will run through February 2020. This is part of a larger study of state tourism office websites being conducted by Destination Analysts (a leading tourism research and marketing company). The primary objective is to develop a website user profile (demographics, psychographics, attitudinal and behavioral information about website users, as well as content sought on the website). The study is comprised of two surveys including a website intercept survey that is completed when a website user visits traveloregon.com and the follow-up survey sent after the website user's intended date of travel.

Interim findings (six months of survey fielding) reflect the objective of Travel Oregon's content team to be the most trusted source for travel inspiration and information to Oregon:

- Most out-of-state website users are gathering information specifically for leisure travel (82.8%).
- The primary objective of using traveloregon.com is to search for inspiration/travel ideas and gather information on places to go/things to do.
- Nearly 40% of out-of-state and 70% of in-state website users gathering trip information on traveloregon.com could potentially be converted by the website in making the decision to take a trip to and within Oregon.
- Nearly 80% of out-of-state survey respondents visited Oregon post-use of traveloregon.com (78.3%).



- Almost two-thirds of out-of-state website users reported visiting four or more cities/towns during their visit to Oregon after using the website (62.3%).
- The average incremental trip¹¹ lasted 4.3 days, with reported in-market spending of \$399.18 per day for each visitor and their immediate party.
 - This is nearly double what we see for the average traveler to Oregon in our Dean Runyan & Associates Oregon Travel Impacts report.
- Travel Oregon will share more comprehensive results from the study following delivery of the final report in early 2020.

Visitor Life Cycle Management (VLM)

VLM is a project that guides consumers through the travel decision making process. Using this, we are able to better identify where travelers are in the visitor lifecycle and simultaneously provide them with the right content at the right time to move them to the next step on their decision-making journey. We have officially completed phase 1 of the VLM project. We have now selected and launched our new marketing automation platform, Marketo. In this phase, we cleansed and merged our consumer databases, migrated our email program to Marketo and have begun sending emails out of the new platform. We are now on to phase 2 of the project, which will include aligning our email program with industry best practices. Some of the improvements you can expect to see are a transactional email template refresh, an email preference center, a welcome email series and email reactivation campaigns.

Fulfillment

The end of FY18-19 marked the completion of our first year working with fulfillment vendor Source Logistics. We have been pleased with the successes of this partnership, including faster shipping and processing times, improved customer service, and cost-effective distribution of individual and bulk orders.

Guide Orders

There were more than 50,000 individual guide orders for FY18-19. While that represents a 16.7% drop YOY, it is a 10% increase over FY16-17. (FY17-18 was an atypical year as it included the Total Solar Eclipse, which helped to significantly boost guide orders for the period.)

Takeaways from auditing our social content for FY 18-19:

- Facebook provided our largest audience reach (21.8 million, compared to 14.6 million on Instagram and 6.8 million on Twitter), while Instagram had the most engagement (6.18%, compared to 0.25% for Facebook and 2.54% on Twitter).
- From a traffic standpoint, Facebook was our most valuable platform, providing 687,302 clicks to traveloregon.com (85% of all social traffic) compared to 56,629 and 19,780 clicks respectively from Instagram and Twitter.
- On Instagram, we continued to experiment with both engagement and click-driven Instagram stories. While there are no industry standards for stories, on average, 50% of folks who watch our stories watch them to the end.
- There's a marked difference between Instagram scrollers and those who watch content via Instagram TV (IGTV). IGTV is more of a "lean back" platform and viewers appear to desire more meaningful content. Long form features such as our "Living with Wildfire," "Freeland Distilling" and "Shipwrecks" videos that were longer garnered a much longer view time than shorter videos such as Moments of Zen or advertising spots.

Key focus areas for social in FY 19-20:

- Explore the viability of TikTok¹² to reach younger audiences. The first step will be to test this platform for the fall campaign.
- Experiment with content formats and platforms.

¹¹Incremental trip is one in which a visitor decided to visit Oregon based on their experience with the website.

¹²TikTok is a social platform for creating and sharing short lip-sync, comedy, and talent videos. It is much like Snapchat and Vine and extremely fun to use. In September 2018, TikTok surpassed Facebook, Instagram, YouTube, and Snapchat in monthly installs in the App Store. <https://www.vox.com/culture/2018/12/10/18129126/tiktok-app-musically-meme-cringe>

- Explore monetization and co-op opportunities for partners with Instagram stories – given the popularity of our sponsored content program, YSE, we will explore ways to extend those concepts on social media.
- Collaborate with Global Sales to examine how we can ensure more efficient account management, content creation and delivery across both the global Travel Oregon social accounts and our domestic accounts.

TRADESHOWS & SALES MISSIONS

Brand USA Sales Mission Tokyo, Japan and Seoul, Korea: July 2019

Travel Oregon met with 15 key Japanese tour operators and buyers in one-on-one, business to business appointments during the annual Brand USA Japan & Korea Sales Mission in Tokyo, Japan and Seoul. This event provided the opportunity to network and meet with 30 members of the Japanese media. As a result of meetings, popular Japanese tour operator, H.I.S., chose to highlight Oregon product with a familiarization (FAM) tour for their top travel agents in fall 2019. This tour will provide first-hand experience of Oregon as a tourism destination helping agents sell Oregon tours to their clients. This FAM tour is co-sponsored by Delta Air Lines Japan.

Festival of the Globe India Day Mela Fair: Silicon Valley, August 16-17

The Festival of the Globe India Day Mela Fair is a two-day event with over 250 booths and exhibits on products, services, travel, arts, crafts, literature, fashion and designs targeted to the Indian consumer. The event was promoted throughout the Bay Area and attended by over 15,000 people. At this event Travel Oregon distributed Oregon collateral and met directly with the Indian consumer. For the generally affluent Indian consumer, Oregon serves

as an enticing destination for a family vacation. Many Indian travelers make their way to Oregon from Silicon Valley and Universities in California where they come to visit family members working and studying in the U.S. Participation in consumer shows is an easy way to promote Oregon to those visitors. This was Travel Oregon's second year participating. Throughout the day, multiple people who stopped at the Oregon booth last year came by to say how much they enjoyed their Oregon trip and plan to return. The final visitors to the booth (pictured) traveled throughout Oregon on a vacation this year, with the exception of the Coast, which they plan to visit for 10 days in the spring of 2020.

MEDIA FAMS

Boulevard Magazine, Canada: June 2019

Travel Oregon hosted the managing editor of Boulevard Magazine (Surrey), which will result in a five-page Oregon feature story with photos. This edition of Boulevard targets the luxury lifestyle of affluent Chinese consumers in the Greater Vancouver B.C. area. This trip highlighted Portland, the Willamette Valley, Coast and the McKenzie River. Gaining media exposure in the Chinese Canadian market is a goal for Travel Oregon.

The Café on TV3: New Zealand, May-July 2019

New Zealand's number one morning lifestyle program, the Café on TV3, came to Oregon to film via a Travel Oregon hosted FAM tour in May. Hawaiian Airlines and Intrepid Travel were partners for the crew's trip. The Café on TV3 reaches 50,000 viewers daily who are key decision makers for their households. As a result of this trip, The Café on TV3 created and aired four segments on Oregon. Each segment was five minutes long and aired over four consecutive weeks in July. Portland, Mt. Hood and Central Oregon were all highlighted during the segments. The team decided to air the segments in July because it is during New Zealand's winter and encourages off-peak season bookings to Oregon. At the end of each segment, there was a call to action directing viewers to sign up to win an Intrepid Travel: Oregon Discovery Tour. 2,900 viewers entered to win the tour.

- View the Café on TV3 segments [here](#).
- View the Intrepid Travel: Oregon Discovery Tour product page [here](#).

The Independent, Ireland: July 2019

An Irish journalist who visited Oregon last fall on a Travel Oregon hosted FAM tour and has since produced a number of articles and television appearances sharing her experience, continues publish articles about Oregon. The latest was July's edition of The Independent, Ireland's largest selling daily newspaper.



TRADE FAMS

Collette Vacations, Domestic Market: August 2019

The product manager and tour director for North America from Collette Vacations visited Oregon for the first time in August to update and add to Collette's 2021 Oregon tour product. Collette Vacations is one of North America's most established and largest group tour operators and has been critical in bringing multiple tour groups to Oregon every year. The trip included the South Coast, Willamette Valley, Portland, Mt. Hood/The Gorge and the Central and North Coast. Highlights included the Elkton Butterfly Center, The Mill Casino, stops along the Wild Rivers Coast Food Trail, Albany Carousel, Oregon Gardens, Gathering Together Farm, multiple wineries in the Willamette Valley, Overleaf Lodge, Inn at Cape Kiwanda, Kelly's Marina, and more local businesses and destinations. Each stop on the trip featured a group-friendly location for tours and will result in updates to Collette Vacation's Oregon tour product.

MEDIA EXPOSURE

Mafengwo.cn – China, July 2019

Travel Oregon's China social media team worked with the marketing team at Mafengwo to launch an Oregon landing page on their mobile app and website. Mafengwo.cn, similar to TripAdvisor, is a social networking app and website that allows users to post their own travel guides/blogs and travel reviews.



This platform has more than 5 million ratings and reviews and includes booking channels for flights, hotels, tours and experiences. The new Oregon landing page brings Oregon to life for Chinese consumers that may otherwise have not found information on Oregon in the past.



Travel Courier, Canada: June 2019

Oregon was the feature cover story in the June edition of Travel Courier, Canada's top travel trade publication. The editor joined the Oregon Road Rally in 2019 and this feature cover story was a direct result of the trip. The digital edition of this publication has an online circulation of 41,000. Read the article [here](#).

Boulevard Victoria, Canada: June 2019

The feature travel story "Jewels of Oregon" was in Boulevard Victoria's June issue as a result of an April media visit that was hosted by Travel Oregon. The six-page spread highlights Portland, the Willamette Valley and the Coast with photos. The publication has a circulation of 30,000 and is a leading lifestyle magazine published bi-monthly throughout Greater Victoria and is the sister-publication to Boulevard Magazine Surrey.



AMA (Alberta Motor Association) Travel, Canada: July 2019

AMA Travel, similar to AAA, featured Oregon Food Trails in the editorial section of their website. This article highlights the East Gorge, Wild Rivers Coast, North Coast and Great Umpqua Food Trails. The

Canadian visitor tends to travel to and through Oregon's rural communities, so a feature on Oregon Food Trails is a perfect fit for AMA's audience. AMA has been in business for 92 years and is Western Canada's number one travel agency. The page can be viewed [here](#).

NEW PRODUCT

Western Leisure, Domestic: June 2019

After visiting Oregon in June 2019 on a Travel Oregon hosted FAM tour, the CEO of Western Leisure immediately created a new wine country-focused itinerary, highlighting wineries, activities and farms in the Willamette Valley. The itinerary package also includes a night in Newport. This itinerary has four nights in Oregon and will be available to consumers to book in summer 2020.

NTA – Nippon Travel Agency, Tokyo Japan – September 2019

NTA – Nippon Travel Agency, the oldest tour operator and travel agency in Japan, has developed three new tour packages featuring five nights in Portland, OR. The company has also created a new, seven-night student graduation trip that includes Portland and Los Angeles, CA. These tours began selling in September and are offered via online and print catalogs. NTA is currently developing new packages that include Crater Lake National Park and the Wooden Shoe Tulip Festival in the Willamette Valley. All of these new products have been developed as a result of a Travel Oregon and Delta Air Lines sponsored product development FAM tour in October 2018.

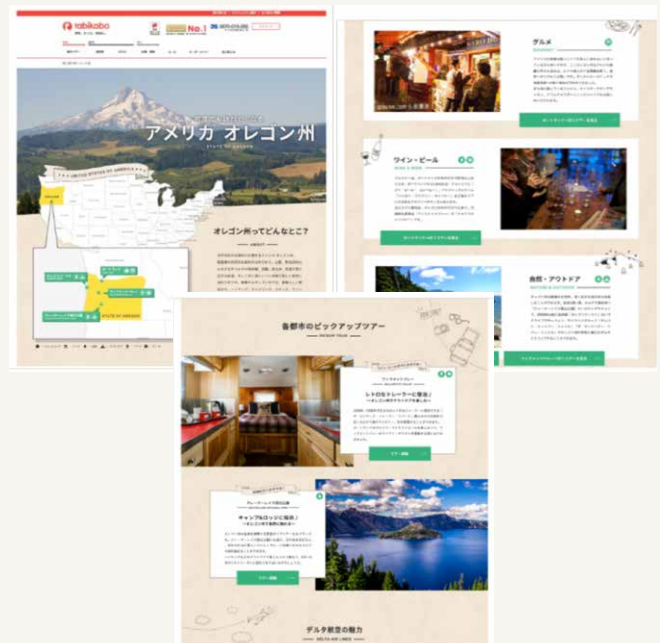


MARKETING PROGRAMS

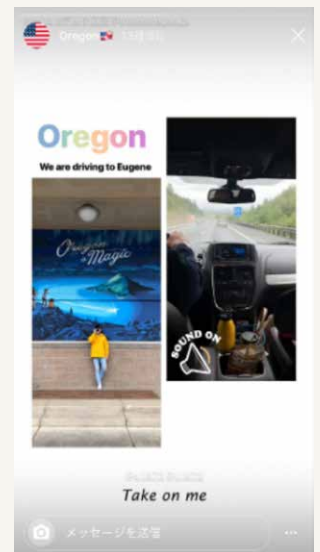
OSE Japan Activation Update and Additional Results

As mentioned in the June 2019 report, Travel Oregon brought the OSE campaign to Tokyo, Japan in March, and through a follow-up FAM tour with influencers from Japan as they followed the Oregon Mural Trail through the state. Below are additional results from the activation, including tour operator bookings, social media influencer impressions and initial results from Delta Air Lines Sky Club micro-activation.

- The tour operator partners from the activation, H.I.S. and Tabi Kobo, have released their Oregon tours booking data for 2019. As of August, H.I.S. has booked 74 of their (5-7 day) Oregon tours – a 340% increase from the previous year, and Tabi Kobo has booked 83 of their (5-6 day) Oregon tours.



- The social media posts by the Japanese influencer that followed the Oregon Mural Trail resulted in 11.6 million views on Instagram, Twitter and Asahi Digital.
- In July and August, Travel Oregon collaborated with Delta Air Lines on an OSE promotion in the Delta Air Lines Sky Club at Tokyo, Narita Airport. The lounge was decorated with seven regional miniature



dioramas developed for Travel Oregon’s activation in Tokyo. The OSE film played on loop in the club, Travel Oregon Japanese brochures were available for guests, and Oregon wine and beer were served during the two-month promotion. This micro-activation was well received, inspiring affluent travelers to consider Oregon for their next vacation. The total number of visitors to the lounge was between 30,000-36,000.



Expedia: Spring 2019

In April, Travel Oregon partnered with Expedia Canada to increase spring travel to Oregon. The month-long campaign targeted Canadians who had recently searched for US destinations on Expedia. Canadians tend to book their own travel online (62%) with the number one booking platform being an OTA, with Expedia being the number one OTA in Canada. The campaign resulted directly in 2,000 hotel room nights, 274 flights with 2,800 passengers, and a gross booking of \$431,508. For every \$1 U.S. dollar invested, this campaign resulted in \$34.50 U.S. dollars in revenue.

In May, Travel Oregon, in partnership with Brand USA, ran a winter booking campaign on Expedia Australia. The timing of the campaign was chosen because May is “Ski Month” in Australia and consumers have their winter holidays top of mind. The landing page on Expedia.com.au included content about the various ski resorts and winter experiences across the state as well as other winter recreation options, video content and a direct booking portal. As a direct result of this campaign, an additional 143 room nights were booked, resulting in a booking revenue total of \$38,135 for Oregon hoteliers. There were 1,104 views of the campaign landing page and 1.3 million media impressions.

Travelzoo Canada Campaign, Canada: Spring 2019

Travel Oregon partnered with Travelzoo for a spring campaign to reach Canadians in markets that can drive or fly to Oregon. This was a two-part campaign, pairing editorial content with hotel booking options through Travelzoo’s “Top 20 Deals” roundup on their website. Targeting consumers across multiple platforms (email, web, mobile and social media), the campaign far surpassed the contracted 5 million viewer reach.

Results for sponsored editorial story:

- Total reach: 5,572,524
- Page views: 18,191
- Outbound clicks: 2,137
- Average time on story: 4:20 minutes
- Scroll rate (to bottom of page): 63%
- Total viewing hours: 973

Top 20 Oregon hotel offer results:

- Emails: 1.5 Million
- Clicks to deal page: 1,529
- Clicks to hotel booking link: 164
- Estimated revenue: \$25,000
- Estimated bookings: 55
- Estimated room nights: 125

NEW TOURISM STUDIO CONTENT

Oregon Business Magazine Highlights the Oregon Food Trails

Travel Oregon worked with Oregon Business Magazine to create a companion video to the fall 2018 article on the Oregon Food Trails program. The video provides an informational and visual overview of the program, as told through narration by two participants of the East Gorge Food Trail. You can watch the new video on our industry [YouTube channel](#).

Travel Southern Oregon Coast (TSOC) Landing Pages on [traveloregon.com](#)

Travel Southern Oregon Coast and Travel Oregon have published up-to-date city pages for the 12 TSOC communities. Each city’s content was developed in partnership with local proponents so that each city page promotes an accurate presentation of the destination. More than 20 new OTIS listings were developed in the area as part of this effort and the results of this work was presented at the Oregon South Coast Regional Tourism Network meeting on September 19 in Gold Beach. You can review the updated content on [travelsouthernoregoncoast.com](#).

SUPPORT AND EMPOWER OREGON'S TOURISM INDUSTRY

Offer development and training opportunities to meet the needs of the industry

MEETING SERVICES

The Industry Services department name has been changed to the Meeting Services department to better reflect the program of work.

Rural Tourism Conference – April 26-28, 2020 – Central Oregon/Sunriver Resort

Staff from various departments are working cross-functionally to focus on the needs of Oregon's rural communities and develop the conference vision, strategy development and program content design:

- **Conference Vision:** The Rural Tourism Conference supports rural communities through continued investment in education, development and leveraging of partnerships for a healthy Oregon tourism ecosystem.
- **Conference Mission:** The Rural Tourism Conference is Travel Oregon's rural-focused platform that delivers practical and applicable education, collaboration and networking opportunities to support our destination management organizations, businesses and industry partners in rural communities.

Desired Conference Outcomes:

- Participants feel welcomed and engaged and understand how to integrate that welcoming message in their own communities.
- An understanding of how to optimize economic impact and livability in rural destinations.
- Clarity on available resources and tools for developing tourism and running an effective business/organization in a rural destination.
- An understanding of how and who to collaborate with in order to champion the value of tourism.

Conference structure:

- Open Networking Reception (Sunday, April 26, 2020)
- General Sessions (Monday/Tuesday, April 27-28, 2020)
- Educational Concurrent Sessions (Monday/Tuesday, April 27-28, 2020)

Education focus areas:

Using Travel Oregon's 2019-2021 Strategic Imperatives and Initiatives, the conference education focus areas have been identified utilizing rural tourism data from Travel Oregon industry surveys and research, and data collected from several working sessions of key stakeholder groups. Survey data from the RDMO's regional priorities will help to shape the focus of the conference educational sessions.

2019-2021 Strategic Overview for the 2020 Oregon Rural Tourism Conference

IMPERATIVES			
Optimize Statewide Economic Impact	Support and Empower Oregon's Tourism Industry	Champion the Value of Tourism	Run an Effective Business (in a rural community)
INITIATIVES - EDUCATION FOCUS			
Align and optimize Travel Oregon marketing programs and empower the industry to do the same Global Marketing	Offer development and training opportunities to meet the needs of the industry Rural Tourism Conference	Grow and align strategic partnerships and stakeholder base to leverage resources and build capacity Partnerships, Grants & RCTP	Deploy agency-wide digital training on agency expectations and utilization of shared technology platforms Global Marketing
Facilitate the development of world-class tourism product and experiences with a focus on priority gap areas Destination Development	Fulfill and respond to unforeseen opportunities and challenges as defined by Oregon's tourism industry Strategy	Activate, engage and inspire new and existing advocates through compelling communication tools and messaging Communications	Prioritize professional development and wellness through a diverse, equitable and inclusive culture of learning and continuous improvement DEI
Support high-use destinations to manage the impacts that stem from visitation Research			
Inspire and grow overnight leisure travel from key international markets Global Sales			

Rural Tourism Conference timeline highlights:

September 2019 – Sponsor and Exhibitor Partnerships program launched

October 2019 – Speaker outreach begins

November 2019 – Scholarship application opens

December 2019 – Details finalized and registration testing

January 2020 – Registration and room block reservations open

April 26-28, 2020 – RTC at Sunriver Resort/Central Oregon

Travel Oregon 101

In-person seminars and webinars have been set for the remainder of the calendar year:

October 7 – Oregon Coast Visitors Association People's Coast Summit / Garibaldi
2 in-person seminars

October 15 – Post - Oregon Tourism Commission meeting / Troutdale
In-person seminar

November 20 – Statewide webinar

December 9 – Post-Oregon Tourism Commission meeting / Florence
In-person seminar

PRODUCT DEVELOPMENT TRAININGS

Tour Operator, Guide and Outfitter (TOGO) 101 Training

Travel Oregon will host its next TOGO training in Cascade Locks November 5-6. This will be a level 101 training and is being facilitated by Bend-based contractor, Consulting Sensei. The training aims to address the unique marketing and operational needs of outdoor travel businesses. Attendees will learn high-impact marketing and communication strategies, and how to navigate land-use permits and set-up successful operations.

OREGON TOURISM STUDIOS

Travel Oregon is embarking on a new season of Oregon Tourism Studios that includes the delivery of three Culinary and Agritourism Studios during the fall. The curricula is refreshed to include customized outcomes dedicated to the Oregon Food Trails program which all three regions have emphasized as the first priority project to come out of the studio. In winter 2020, Travel Oregon will be delivering the second Tourism Experience Studio to be focused on river recreation.

Fall Oregon Tourism Studio Schedule

1. Rogue Valley Culinary & Agritourism Studio

(October 23-24): This Tourism Experience Studio will be convened in partnership with Travel Medford, Travel Southern Oregon, and a steering committee comprised of local and regional organizations to serve communities within the Rogue Valley area of Jackson and Josephine counties. In addition to a culinary and agritourism education for businesses across the subregion, this region has identified the development of an Oregon Food Trail as a priority outcome of this two-day workshop.

2. Central Coast Culinary & Agritourism Studio

(November 12-13): This Tourism Experience Studio will be convened in partnership with Travel Lane County and OCVA to serve communities in Lincoln and coastal Lane counties. A subregion rich with wild foods, foraging and fishing, this studio will focus on developing the area's unique culinary, agricultural and aquacultural assets into new or expanded visitor experiences. Key priorities for initial studio outcomes include developing an Oregon Food Trail, increasing supply chain connections to maximize purchasing power and identifying opportunities to connect the upcoming Central Oregon Coast Food Trail with its existing counterparts along the Southern Oregon Coast, Douglas County, South Willamette Valley and the North Coast.

3. Polk County Tourism Studio – Food Trail

Development Workshop (November 14): As a follow-up to the Polk County Rural Tourism Studio that concluded in 2015, Travel Oregon will partner with Travel Salem, WVVA, and local leaders to deliver a culinary and agritourism training with the intention of developing an Oregon Food Trail in the Polk County area.

4. Willamette River Recreation Studio

(February-May 2020, dates TBD): This Tourism Experience Studio will be convened in partnership with WVVA, Willamette Riverkeeper, and local and regional leaders, and focus on recreation development opportunities along the Willamette River. Program design will expand upon the structure of the recent Clackamas River Recreation Studio and include intensive work with the steering committee to help shape the delivery of the program. Travel Oregon initiated a series of meetings with these stakeholders starting in September, leading up to public workshops and events in winter 2020. A FAM tour for Travel Oregon and the local steering committee was hosted in September to highlight river recreation along the Willamette River in preparation for hosting the studio next year.

OREGON TOURISM STUDIO FOLLOW-UP SUPPORT

Fall Oregon Tourism Studio Reconvening Meetings

This fall, the Community-Based Services team is planning several Oregon Tourism Studio reconvening meetings in the John Day River Territory, Klamath Basin and Oregon's Outback to help guide communities in the development of existing and new projects. These meetings will be an opportunity to celebrate recent successes and re-engage the community in new tourism development projects. In addition, community year-end project status reports are being conducted to help develop the Community-Based Services strategy for follow-up support for 2019-2020.

Support and enhance an industry-leading information network as the trusted source for all things Oregon

WELCOME CENTERS

Q4

Quarterly visitor counts were down slightly (1.8%) across all centers, with the largest decrease in visitation reported by the Oregon City and Klamath Falls Welcome Centers. Both centers reported a 34% decrease in quarterly visitor traffic representing a combined total of 4,170 fewer visitors.

The Ontario and Klamath Falls Welcome Centers opened for the spring on May 1 after being closed for the winter season.

Annual

Overall walk-in visitor counts across all centers were down 8.1% for FY 18-19. This decrease is largely due to the fiscal year comparison against FY 17-18 which had a 42% visitor increase for the month of August during the eclipse.

The FY 18-19 visitor count across all centers was nearly 200,000. At this time next year, counts for the new Welcome Center in Ashland will be included and are anticipated to raise the total visitor counts to approximately 250,000.

Training and Development

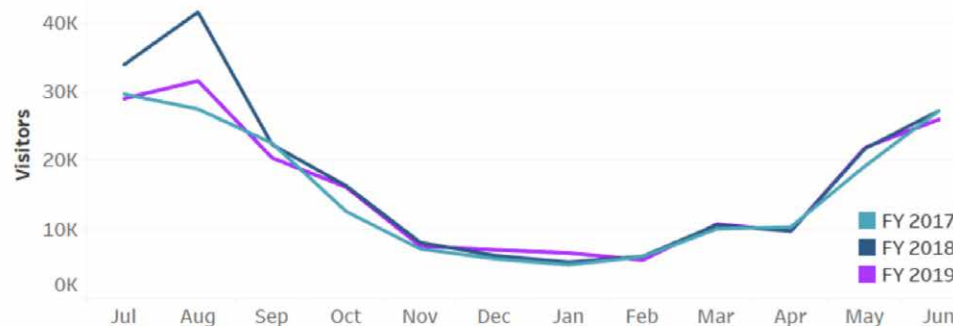
Managers from each welcome center gathered in Ashland for the seasonal kick-off meeting May 16-19. The meeting focused on Travel Oregon campaign initiatives and program updates including visitor counting procedures and data collection goals. Additionally, Travel Southern Oregon presented a regional overview, highlighting emerging visitor attractions and providing updates on existing destinations. The last day concluded with a FAM tour of the area to experience local attractions first-hand, including a hard-hat visit to the new Ashland Welcome Center.

Ashland Welcome Center

Travel Oregon executed a contract with TSO for the staffing of the new Ashland Welcome Center in April. A preview tour of the new welcome center was held for the TSO Board of Directors in May. TSO began welcome center staff recruitment through a local staffing agency, resulting in the hire of the Welcome Center manager in May, and six travel advisors in early June.

On June 7, ODOT and Travel Oregon partnered to hold a private ribbon cutting event and facility tour to acknowledge the work of stakeholders involved in the successful completion of the project, more than ten years in the making. Attendees included city and state

Welcome Center Visitor Counts



Monthly - June

FY 2018	FY 2019	
27,222	25,948	-4.7%

Quarterly - Q4

FY 2018	FY 2019	
58,647	57,567	-1.8%

FYTD

FY 2018	FY 2019	
208,706	191,896	-8.1%

officials, DMO and RDMO partners, representatives from the local police and fire departments, and other local tourism businesses.



Staff training for the new manager and travel advisors was a priority during the month of June. The welcome center opening date hinged on ODOT's Rest Area opening timeline, which was in flux for the majority of Q4. Despite that, our work was completed, and we were ready to open the center in July. The Global Marketing team also began planning for an official, consumer-facing, week-long Grand Opening event for visitors leading into Labor Day. The event featured a farmers market of local vendors, purveyors, and entertainers each day during the celebration.

OREGON TOURISM INFORMATION SYSTEM (OTIS)

Statewide, strategic integration of OTIS was a key initiative for the last biennium. The focus of Q4 was making critical software updates to the foundation of OTIS. Updates are noted below:

- **Travefy¹³:** As mentioned in the last report, the team was working to integrate the Travefy platform with OTIS. However, after a significant amount of discovery, we decided not to integrate with Travefy. Travefy no longer supports critical functionality needed to make this partnership possible. The team is open to possibly reviewing this partnership again should anything change.
- **Platform usage:** The team is currently working on implementing tracking and usage reports within the platform. This will enable us to have a better handle on how partners use the platform. We expect this functionality to go live in Q2.
- **How-to videos:** The team identified several "how-to" videos we would like to create to support partners. The first priority is a series of three videos explaining how the OTIS API¹⁴ works. The primary audience for these first few videos is developers who work on DMO sites.

Annual

18-19 was a highly successful growth year for OTIS.

- Before the launch of OTIS, there were 26 organizations leveraging Orb. Two years later, we are 85 organizations strong (not including TO) and growing (227%).
- A goal of OTIS is to streamline listing management efforts for DMOs so that they can be efficient and share their content widely. We've been able to do this by providing partners with a free, open-source API. Twelve organizations are using this API to power their website with OTIS listings.
- We are positioned to meet content partners where they are at. This past year we launched functionality called Rest API Integration Application (RAIA). This interface enables us to pull partner content automatically. Our first successful integration was with the Oregon Wine Board (OWB). They created a feed of tasting room listings that OTIS imports nightly for updates.
- Lastly, trainings decreased YOY by 40%. This was not unexpected as there were several existing DMO partners needing to be re-trained and a lot of momentum with the launch of the new database. That said, opportunity remains to onboard new DMOs and enhance trainings to provide additional educational opportunities.

Convene industry action networks to influence stakeholder action and increase collaboration

REGIONAL COOPERATIVE TOURISM PROGRAM (RCTP)

2017-2019 Financial Review

The RCTP team at Travel Oregon has been working with Aldrich Advisors LLC to perform a financial review of 2017-2019 RCTP investments. Each region was asked to provide Aldrich with the following financial details:

- Budget vs. Actuals summary
- Transaction listing or detail of expenditures for selected RCTP investments

¹³Travefy is a software platform enabling Travel Oregon to create itineraries and proposals. The team uses it to collaborate with RDMOs to create media and travel trade familiarization (FAM) itineraries.

¹⁴API (Application Programming Interface) allow applications such as databases and websites to communicate with one another programmatically.

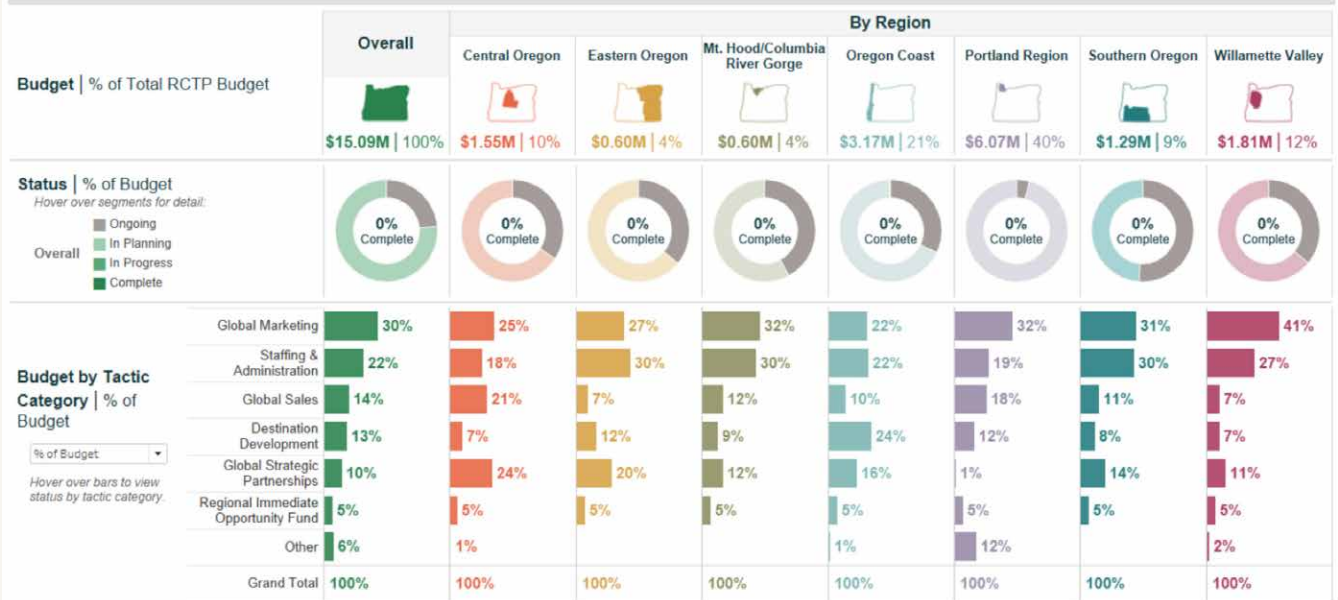
RCTP Plan Summary: Biennium

Fiscal Year View

Biennium



To view a regional plan in greater detail, click on a region's logo below:

**2017-2019 RCTP Report**

Per RCTP guidelines, The RCTP team at Travel Oregon has developed a comprehensive report of investments and activities associated with the 2017-2019 biennium. The full report can be viewed [here](#). An online report format was chosen to more succinctly showcase the true nature of the variety of RCTP investments, and specific communities that they impact.

2019-2021 Regional Plans & 2019-2021 Dashboard

Finalized plans have been developed and published. A redeveloped RCTP program tracking dashboard with updated 2019-2021 investments/programming has been published. Both, the finalized regional plans and the 19-21 dashboards can be viewed [here](#).

OREGON OUTDOOR RECREATION NETWORK

Travel Oregon serves in a network management role, convening the core team and active partner meetings, and coordinating the work of the action teams.

Communications Action Team Update

The Communications Action Team was created to develop and deploy a statewide communications plan for responsible recreation in Oregon. The communications plan will address topics like “Leave No Trace”

principles, stewardship, preparation, appropriate gear and other outdoor recreation issues common across the state.

The plan incorporates flexibility to adapt messaging to each region and outdoor sector, giving us the ability to align our messaging with a broad group of stakeholders and reach visitors and Oregonians alike. The Communications Action Team has contracted with Maxwell PR agency to develop a communications toolkit to ensure content can be widely distributed and easily integrated into existing local, regional, state and



federal communications platforms. The toolkit will contain newsletter copy, sample social media posts, printable collateral and a simple, widely recognized icon and slogan we hope will become part of our ethos and fabric as Oregonians. Target launch for the full communications plan is February 14, 2020 with an initial launch of toolkit components in the fall of 2019.

Diversity in the Outdoors/Roadmap to the Outdoors Action Team

As Oregon's First Gentleman, Dan Little has made it his personal passion to increase access to the outdoors for all Oregonians. The First Gentleman's initiative, titled "Roadmap to the Outdoors," serves as an action team focused on reducing barriers for people getting outdoors and increasing the engagement of youth and under-represented communities. Strategies for success are built around improved marketing and communications, infrastructure, transportation, education and representation on leadership boards and commissions that reflect the demographics of Oregon.

A team of partners convenes monthly to advance these recommendations. For the past several months, meetings have primarily focused on providing participation and economic impact policy recommendations for the Governor's Task Force on Outdoor Recreation.

Economic Impact Action Team Update

The Economic Impact Study Action Team is focused on designing and delivering a statewide study that will estimate the economic impact and economic contribution of outdoor recreation in Oregon. The study will include analyses of the total spending on outdoor recreation in Oregon, as well as direct and secondary impacts of outdoor recreation including employment and tax revenue from both locals and visitors (people traveling more than 50 miles from their home). Through a RFP process, the action team has selected Earth Economics to complete the economic impact study. The action team is in regular communication with Earth Economics to move this project forward. The economic impact study should be completed in the spring of 2020.

Signature Trails Action Team Update

The Signature Trails Action Team was created to identify and collectively support the development and ongoing maintenance of priority signature trail systems that have the potential to be world-class and, when completed, will make a major difference in Oregon. In spring, the Signature Trails Action Team hired Alta Planning + Design to develop a presentation and advocacy tool that shares the broader vision of

signature trails, while also imagining a future state of the Oregon Coast Trail – a fully realized signature trail, an integrated experience that includes access to transportation and lodging providers, consolidated info on guides and outfitters, and information and booking services available in a single online site. This resource will be used to help advance the Oregon Coast Trail project and initiate conversations with land managers, potential funders and elected officials about the potential of signature trail projects across the state. The action team has been providing active feedback to Alta Planning + Design, and the final deliverable is scheduled to be delivered in late September. The first presentation will take place at the Oregon Trails Summit, October 4-5 in Roseburg.

Transportation Action Team Update

The Transportation Action Team was created to complete a statewide transportation strategy that identifies tourism and outdoor recreation transportation solutions for high-use areas. In spring 2019 the action team began negotiating a contract with the University of Oregon to focus on providing transportation strategies to the outdoors from the Eugene area, leveraging the much anticipated 2021 IAAF World Athletics Championships coming to Eugene. This contract is currently being finalized.

Network Design Action Team Update

The Oregon Outdoor Recreation Network active partners met in early June, to debrief the Oregon Outdoor Recreation Summit, share action team updates, and to continue discussions on how best to evolve the Active Partner network. In August, the Oregon Outdoor Recreation Network core team met to re-structure format going forward. Outreach efforts are underway to recruit another four to five active partners, who will join the next meeting in December at Timberline Lodge. In September, the Oregon Outdoor Recreation Network action team lead call was reinstated, providing a regular opportunity for this group to share and receive updates, and to explore opportunities for collaboration.

Also in September, the Oregon Outdoor Recreation Summit management team met to debrief this year's event and consider next steps. A decision was made to host the next Oregon Outdoor Recreation Summit in the fall of 2020; ideally, located in the Mt. Hood/Columbia Gorge region. Next steps are to establish a management structure for this event, and to set early preparations in motion.

OREGON AGRITOURISM NETWORK

Oregon Agritourism Coordination & Strategy Meeting

On July 25, Travel Oregon hosted an Agritourism Coordination & Strategy Meeting in Cascade Locks. This meeting was the latest in a series that Travel Oregon has been convening in partnership with agencies, organizations and producers since the launch of the Oregon Agritourism Network in 2012. Feedback from meeting attendees stated the engagement offered valuable networking and opportunities to share ideas for a unified direction forward. Travel Oregon is committed to continuing to convene stakeholders in Oregon, including the Oregon Agritourism Steering Committee, and is currently working to set revised priority outcomes for the 2019-21 biennium.

DESTINATION-BASED NETWORKS

Columbia Gorge Tourism Alliance (CGTA)

The CGTA is in the process of hiring a network manager that is being partially funded by Travel Oregon. With added capacity and convening power, they hope to make a greater impact with established priority projects that will continue to help them to achieve their 15-year vision. This is a six-month contract position that will support and build on the network strategy and development efforts of the last two years.

Oregon South Coast Regional Tourism Network (OSCRTN)

The OSCRTN Network management and coordination is evolving to include additional staff support for middle and back of the house network activities. Julie Miller, the network manager that is being partially funded by Travel Oregon, has been hired to be the Executive Director for the Travel Southern Oregon Coast (TSOC). The alignment of the network and TSOC through shared leadership will make for a strong connection that leverages the momentum and leadership to create meaningful impact for communities.

Polk County Tourism Alliance (PCTA)

The previous network manager/destination development manager, Norah Owings, has moved on from her role with the PCTA. Her position is now open for applications through Travel Salem and is being partially funded by Travel Oregon. This role will focus on supporting the PCTA, the leadership committee that is developing projects and priorities stemming from the Polk County Rural Tourism Studio.

Fulfill and respond to unforeseen opportunities and challenges as defined by Oregon's tourism industry

OUTDOOR RECREATION & WILDFIRE

Travel Oregon is participating on both the Governor's Task Force on Outdoor Recreation as well as the Governor's Council on Wildfire Response. Sara Morrissey, Public Affairs Manager, is the agency's representative for both groups.

Governor's Task Force on Outdoor Recreation

The **Governor's Task Force on Outdoor Recreation** has been meeting since April 2019 and is working to develop high-level recommendations on the following topics:

- Economic development of rural and urban areas to ensure equal access to the outdoors.
- Balancing improved access to the outdoors with environment and natural resource protection.
- Increasing outdoor participation, especially among youth and traditionally underserved communities.

Policy recommendations were due late September and will be reviewed and evaluated by the task force during the fall. A smaller subcommittee, on which Travel Oregon is represented, is also meeting to recommend funding sources for outdoor recreation investments. The task force will submit a report of recommendations to the Governor in spring 2020.

Governor's Council on Wildfire Response

The **Governor's Council on Wildfire Response** was formed in late January and has been meeting throughout the year. The council is tasked to review Oregon's existing wildfire response and recommend comprehensive policy and program changes to meet current and future wildfire challenges. Travel Oregon is providing comments and suggestions for policy and programs to the Economic Recovery Subcommittee (which falls under the general Recovery Committee). The Council will submit a report of recommendations to the governor in late fall 2019.

WILDFIRE RESPONSE

A combination of wetter weather, lower temperatures and more robust and coordinated campaigns around fire safety resulted in a less intense wildfire season for 2019. While some drier autumn months remain, state agencies are optimistic that this year will reflect drastically fewer wildfire impacts than previous years.

Travel Oregon continued its partnership with Visit California and Washington Tourism Alliance on revamping and updating the West Coast Travel Facts website to include an air quality map that includes live video links and inspirational multi-state itineraries to encourage travelers to modify their trip if they are impacted by a wildfire. The new website launched September 27.

Sara Morrissey attended the Pacific Northwest Economic Region's Annual Summit in Saskatoon Canada to present on both the 2017 Travel Oregon wildfire economic impact study and the 2018 wildfire perception study that looked at how wildfires impacted visitor behavior, perception and future travel plans. An executive summary of the visitor perception report will be released fall 2019.

As part of their FY19-21 plans, RDMOs have been directed to set aside 5% of state funds for recovery and preparedness. This funding can be utilized by regions and partners to drive visitation to a specific community or region post-disaster or be spent on resiliency efforts.

CHAMPION THE VALUE OF TOURISM

Grow and align strategic partnerships and stakeholder base to leverage resources and build capacity

STRATEGIC PARTNERSHIPS

Deschutes Brewery Partnership

Global Strategic Partnerships and Global Marketing teamed up with Deschutes Brewery to make the “Only Slightly Exaggerated IPA” to celebrate all things Oregon. This incredible connection is a testament to the power of partnerships to elevate the Oregon brand while raising awareness of our partners and the great work they do. The Communications team pitched the collaboration resulting in segments on KPTV’s “More Good Day Oregon” news program and KGW’s “Tonight with Cassidy.” This seasonal brew comes in 12-ounce bottles in six and 12 packs. The beer is available in 32 states and in all major retail outlets, convenience and liquor stores, as well as restaurants and bars.



New Seasons Market Partnership

Global Strategic Partnerships and Global Marketing have been able to leverage all the cross functional work with the Oregon Food Trails and Destination Development through an exciting partnership with New Seasons Market. Travel Oregon and New Seasons Market had a co-branded booth on site at FEAST Portland, which was located at the entrance of the main



event: Big FEAST. The booth featured Travel Oregon and Oregon Food Trails brands. Travel Oregon also created a canvas shopping bag featuring Travel Oregon and Oregon Food Trails logo as a giveaway item. In addition, Travel Oregon created Oregon Food Trail-focused videos featuring Maya Lovelace of Yonder, in “FEAST Fab Collab,” Runcible Cider from the East Gorge Food Trail, and The Great Umpqua Food Trail. These videos were promoted by Travel Oregon, FEAST and New Seasons Market.

Portland Cambia Classic

Travel Oregon was a sponsor of the 2019 Portland Cambia Classic and Women’s Leadership Summit, August 29 – September 1. This year’s Summit focused on “Keeping Portland Resilient,” sharing powerful stories of women who have found success because of their ability to navigate challenging situations. The sponsorship also included four playing spots in the Cambia pro-am. All four spots were filled by young women from The First Tee—a program that helps young people instill life-enhancing values and promote healthy choices through the game of golf.



2019 World Athletics Championships

Travel Oregon and partners from Travel Lane County, Travel Portland, University of Oregon, Sport Oregon, Oregon21 and the governor’s office traveled to Doha, Qatar, for the 2019 World Athletics Championships, September 27-October 6. Travel Oregon staffed a booth at the IAAF Congress, where team members had the opportunity to connect with National Member Federations to promote Oregon locations as potential training camps for visiting teams. Travel Oregon partnered with the Oregon Governor’s Office, USA Track and Field and IAAF to host a media event in Doha at the USA House to further promote Oregon21.

Travel Oregon produced two 30-second vignettes for global broadcast to be used during the last five days of the IAAF 2019 World Athletics Championships in Doha. The vignettes were broadcast across many international markets and the U.S., with scripted content on Oregon in several languages. This broadcast opportunity was key to promoting Oregon as a destination to visit before, during and after the IAAF World Championships in Oregon21 to a global audience.

Activate, engage and inspire new and existing advocates through compelling communication tools and messaging

INDUSTRY COMMUNICATIONS

Q4

The Communications team garnered 153 stories with a circulation of 171.8 million and average story score of 8.4/10. These numbers all showed a YOY increase compared to Q4 17-18, with 141 stories, 139.6 million circulation and story score of 7.8/10.

Annual Reporting: Industry

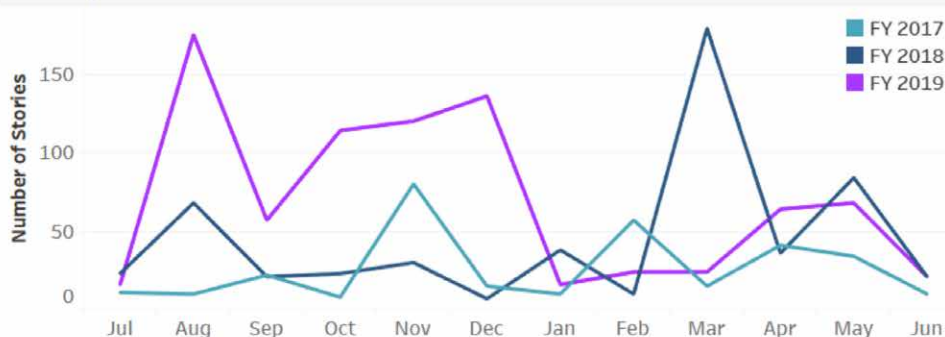
During FY 18-19, the Communications team secured a record-breaking 834 stories with a circulation of 932.7 million and story score of 8.1/10, compared to FY 17-18 where we garnered 543 stories with a circulation of 1.2 billion and a score of 8.1. That represents a 54% increase in the number of stories placed compared to FY 17/18. Moreover, for the 17-19 biennium, 1375 stories resulted in a 154% increase from the previous biennium. FY 18-19 numbers can be largely attributed to coverage we received from the Capitol Christmas Tree (284 stories, 438.1 million circulation and 8.3/10 score), a special partnership project with the Willamette National Forest and WVVA. Additionally, we received significant coverage from the wildfire

impact study/wildfire recovery coalition project last summer, and OSE re-launch in spring. Overall, we exceeded internal goals for story count and score, but were slightly down in circulation, predominantly because industry coverage tends to run in regional publications with lower readership numbers (but highly engaged audience). Industry coverage helps fulfill our strategic imperatives of Championing the Value of Tourism and Optimizing Statewide Impact by telling the stories of Oregonians and the positive economic impact that the travel and tourism industry generates.

Coverage Highlights



Industry PR - # of Stories Trend



Monthly - June

FY 2018	FY 2019	
21	21	0.0%

Quarter - Q4

FY 2018	FY 2019	
141	153	8.5%

FYTD

FY 2018	FY 2019	
540	835	54.6%

National Travel and Tourism Week (May 5-11)

National Travel and Tourism Week (NTTW) is the U.S. Travel Association's annual campaign to unite the travel and tourism industry across the country to celebrate the value of tourism for our economy, businesses and personal well-being. This year's theme was **Travel Matters**, to recognize the numerous ways travel enriches and strengthens local communities.

As in previous years, Todd Davidson, alongside members of the Communications team hit the road and met with editorial boards, business writers, travel writers, radio hosts and broadcast journalists around the state to share the 2018 Dean Runyan Economic Impact Report and highlight the power of tourism in Oregon. Stops were made in Portland, Astoria, Eugene, Bend, Baker City, La Grande, Pendleton and The Dalles. Overall the tour garnered great regional coverage including stories in *The Bend Bulletin*, *Portland Business Journal* and *OPB* to name a few.

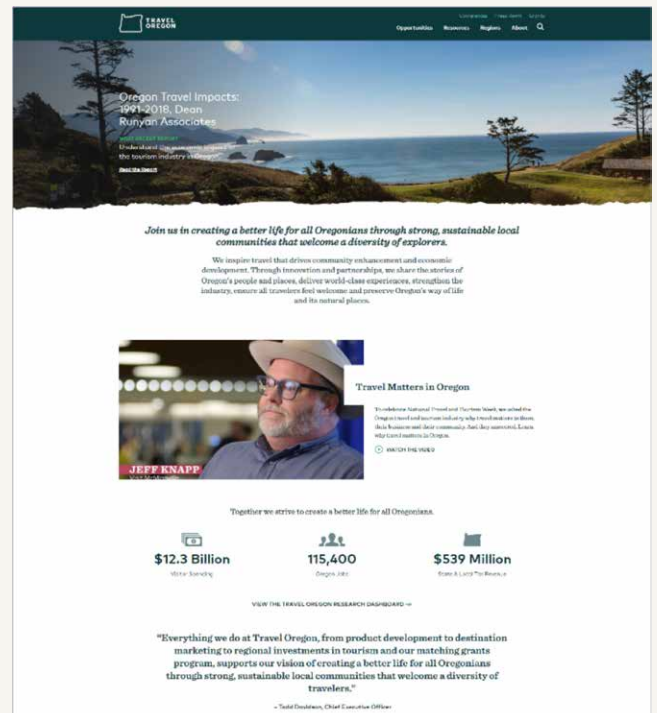
All Q4 results can be found in the Earned Media Coverage Appendix.

Industry.traveloregon.com

We soft-launched the new industry website on June 11. The *official* launch of the website to industry partners went out June 25, via dedicated email and posts to Twitter and LinkedIn.

The primary reasons for the redesign included:

- Improve user experience: Based on survey feedback from both the industry and staff, it was clear that information was hard to find and that the keyword search was not effective.
- Optimize content: The previous site was coded before content was optimized for mobile, an ever-growing traffic driver.
- Address technical debt: The previous website was running off a version of WordPress that was at least 10 versions behind.



- Update brand: The previous version of the industry site was still using branding from 2012.

Q4

In Q4 we saw an increase of 24% in traffic to industry.traveloregon.com due to the Governor's Conference, the industry awards and the launch of the new industry site. The new site was revealed through Breaking News on June 25 and received by 4,635 industry contacts.

Annual

In FY 18-19, web traffic increased 13% YOY. The web traffic increase was due to grant opportunities, Governor's Conference, job opportunities and the launch of the new industry site in June.

Industry Website Traffic Trend



Monthly - June

FY 2018	FY 2019	
4,338	5,428	25.1%

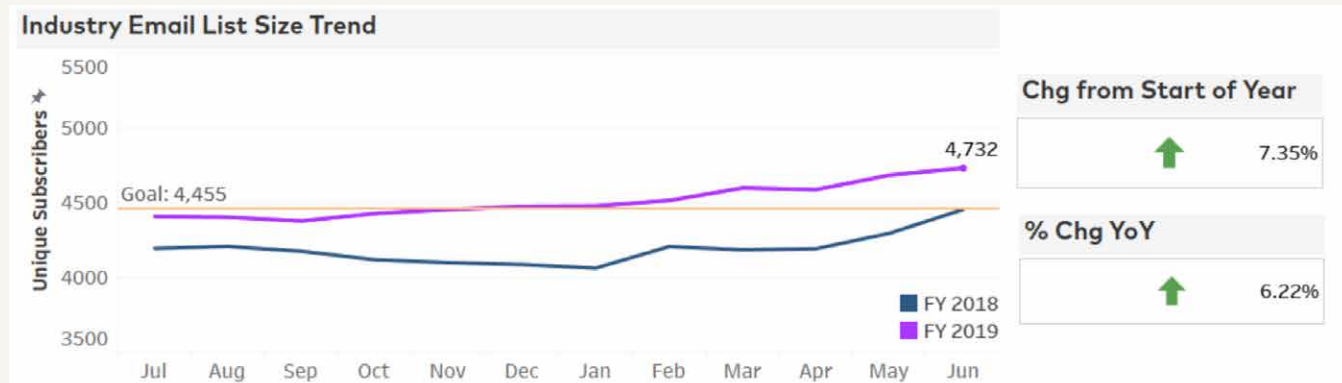
Quarter - Q4

FY 2018	FY 2019	
15,686	19,392	23.6%

FYTD

FY 2018	FY 2019	
55,180	62,504	13.3%

Industry Newsletter Subscribers



Q4

Our industry newsletter subscriber list increased by 5% from last year. Content that receives the highest readership is grant related, or opportunities that present a specific call-to-action for industry partners.

Annual

Industry newsletter subscribers increased by 6.22% from last year. Engagement was high with an average open rate of 28% and an average click rate of 12%.

PUBLIC AFFAIRS

Two Federal bills (H.R. 3851 and S. 2203) were introduced in July that are focused on reauthorizing Brand USA. Brand USA provides an excellent market entry for Travel Oregon and provides us with the leverage needed to extend our international presence across the globe. Travel Oregon has partnered with Brand USA on multiple recent efforts including the OSE ad campaign in Tokyo and developing online destination training modules via Brand USA's Discovery program. Travel Oregon has reached out to the Oregon delegation to communicate the importance of renewing Brand USA this year and is requesting co-sponsorship of the bills. Both Oregon Senators are in support as are Representatives Bonamici, Blumenauer, Schrader and Walden.

RUN AN EFFECTIVE BUSINESS

FINANCIALS

2019-20 FYTD

The Commission adopted budget anticipates Transient Lodging Tax (TLT) income for FY 19-20 of \$41,300,000. TLT income fiscal year to date through August 31 is \$7,584,929, or 18.4% of TLT budget. Funds from prior periods for the RCTP program for this fiscal year are \$7,538,000; beginning balances for the Grants program total \$4,589,138 including funds awarded but not disbursed in prior period. Fiscal year-to-date agency expenses, Grants and RCTP disbursements, and future programming reserves total \$10,607,763, or 23.7% of budget; programmatic and payroll expenses are well within budget.

Proceeds from Wine Country License Plate sales fiscal year-to-date through August 31 is \$112,376, averaging \$37,459 per month. \$22,761 has been distributed in tourism promotion funding this fiscal year-to-date.

Deploy agency-wide IT training on agency expectations and utilization of shared technology platforms

IT Platform and Resources Modifications

Travel Oregon is in process of sourcing potential contract services support to make improvements and enhancements to agency Share Point settings, mapping and functionality. Our work in this area and direction on integration improvements will be discussed and informed by input via cross-functional user groups and a use/needs analysis. Travel Oregon moved from a local server environment to cloud Fall of 2017 and ongoing work on the priorities established in our Strategic Plan will guide the modifications to our MS 365 work environment.

MS 365 Training for staff

Once modifications to Share Point have taken place, we will turn our attention to getting all staff members up-to-speed on new design, functionality and expectations for use. All employees will undertake formal training, some individual and some in group setting, through a variety of means, including on-site and off-site user

training on MS 365 applications as well as through computer-based distance learning. We will provide post training satisfaction surveys to solicit feedback as well as providing resource materials to reinforce learning. An important element of this process is assessing understanding and providing for ongoing support.

Streamlining and Consolidation of subsequent software

In addition to MS 365, Travel Oregon staff use a variety of platforms such as Salesforce and Basecamp to manage and accomplish their goals. As was done prior to cloud migration, we will again inventory all software and IT services that staff are currently working with. Our intent in the process is to streamline and standardize the environment while also pursuing efficiencies that lead to a reduction in agency IT costs. Discontinuation of, or merging of existing software accounts, will take place only once we have evaluated our software needs, identified alternative and preferred solutions, trained staff and established clear use expectations.

Prioritize professional development and wellness through a diverse, equitable and inclusive culture of learning and continuous improvement

New Community-Based Services Manager Joins Destination Development Department

Travel Oregon welcomed Bri Matthews as the Destination Development's new Community Based-Services Manager. In her role, Bri will provide follow-up support to Oregon Tourism Studio communities. She will provide strategic, effective support to OTS community leaders; work cross-functionally to optimize and share community success stories in addition to training and development resources through traveloregon.com; and act as a liaison between communities and the greater Destination Development department. She will also oversee the OTS Matching Grants Program in partnership with the Grants team.

*Continuously improve, communicate
and ensure alignment on policies
and procedures*

Following a meeting with the Department of Administrative Services (DAS) contracting and procurement specialists, we have determined to more closely align our purchasing and contracting policies with other state agencies. As of July 1, we have increased our contract threshold limit to \$10,000, meaning that all small procurement purchases or services under the threshold no longer require a contract. While no contract is required for program expenses below this threshold, all program managers and departments are required to maintain communications records, documentation to substantiate the need and purpose of expenditures, deliverables received. Department heads continue to have the responsibility to review, authorize and approve payment on all expenses. Staff trainings have been provided during all-staff meetings and through voluntary “lunch-and-learn” sessions made available monthly.

APPENDIX – Q4 CONSUMER COVERAGE

TRAVEL OREGON EARNED MEDIA COVERAGE Q4, Fiscal Year 18/19				
CONSUMER				
Date	Publication	Headline	Summary	Link
APRIL				
4/24/2019	seattlemag.com	"Recharge in the Pacific Northwest's Original Beach Town"	An article suggesting ways to spend time in Seaside.	Link
4/24/2019	via.com	"10 Classic Summer Activities"	A round up of suggested summer activities on the west coast.	Link
4/25/2019	mnn.com	"How an earthquake and El Nino created the Neskowin Ghost Forest"	An article about the Neskowin Ghost Forest, inspired by TO content and OSE campaign.	Link
4/26/2019	afar	"Portland's Favorite Outdoor Playground Is Making Its Post-Wildfire Comeback"	An article about the impacts of the wildfires on the Columbia Gorge and what you can do now.	Link
4/30/2019	forbes.com	"This Portland Coffee Brand Is Creating Zero Waste Cafes"	A story about Nossa Familia in Portland.	Link
MAY				
5/2/2019	latimes.com	"Escapes: Chongqing, China, is all about food, glorious food"	A travel roundup includes a teaser of an upcoming story on Depoe Bay.	Link
5/6/2019	VIA	"10 Classic Summer Activities"	A roundup of suggested summer activities on the west coast.	(PRINT)
5/9/2019	foodandwine.com	"20 Cookbook Gift Ideas for Your Mom (Or to Keep for Yourself)"	A round up of cookbooks including Salt & Straw; cookbook release at NYC activation.	Link
5/17/2019	cbsnews.com	"No Exit!"	A segment with Jane Pauley that included ODOT messaging curated by TO and Weinstein PR.	Link
5/22/2019	nytimes.com	"Unlikely Hikers hit the trail"	An article about the Portland-based instagram account, Unlikely Hikers, that features LGBTQ and people of color recreating in the outdoors.	Link
5/26/2019	forbes.com	"Atticus Hotel In McMinnville: Oregon Wine Country's Most Luxurious Lodging"	An article about the Atticus hotel and McMinnville as a charming wine country destination.	Link

5/26/2019	latimes.com	"A different Oregon unfolds in the wild, wild east"	An article featuring a relaxing weekend trip in Eastern Oregon.	Link
5/26/2019	LA Times	"No rush, it's rustic"	An article featuring a relaxing weekend trip in Eastern Oregon.	(PRINT)
5/30/2019	latimes.com	"Escapes: In search of solitude in eastern Oregon"	An article featuring a relaxing activities to do in Eastern Oregon.	Link
5/30/2019	nytimes.com	"36 Hours in Bend, Ore. (and Environs)"	An article about things to see and do in Bend and Central Oregon.	Link
JUNE				
6/3/2019	Fatherly	"25 Family Destinations That Redefine Unplugged"	A roundup includes off-grid vacation spots featuring Minam Rover Lodge.	Link
6/1/2019	Food & Wine	Arbequina Olive Oil Recipe	Salt & Straw cookbook recipe featured in June issue; cookbook release was part of the NYC Salt and Straw event.	(PRINT)
6/3/2019	nytimes.com	"Summer Reading"	A round up of summer reading recommendations that includes the Salt&Straw Cookbook; Cookbook released at NYC activation.	Link
6/5/2019	rd.com	"The Best Hiking Trails in Every State"	A round up of the best hikes in every state; includes Drift Creek Falls.	Link
6/6/2019	Outside	"10 Amazing Glamping Spots in North America"	A roundup features The Vintages in Dayton, Oregon.	Link
6/10/2019	forbes.com	"Top American Summer Wine Festivals"	A round up of wine festivals around the country; includes IPNC in McMinnville.	Link
6/10/2019	vogue.com	"We're in a New Age of Innovative - And Nondairy! - Ice Cream"	A round up about dairy free icecream, mentioning Salt&Straw; NYC activation.	Link
6/11/2019	rachelraymag.com	"Cookbook Crush"	An article about the new Salt & Straw Cookbook, released at the NYC summer series activation.	Link
6/13/2019	Family Circle	"25 Vacation Spots Where You and the Kids Can Get Your Splash On"	A roundup features The Sunriver Resort.	Link

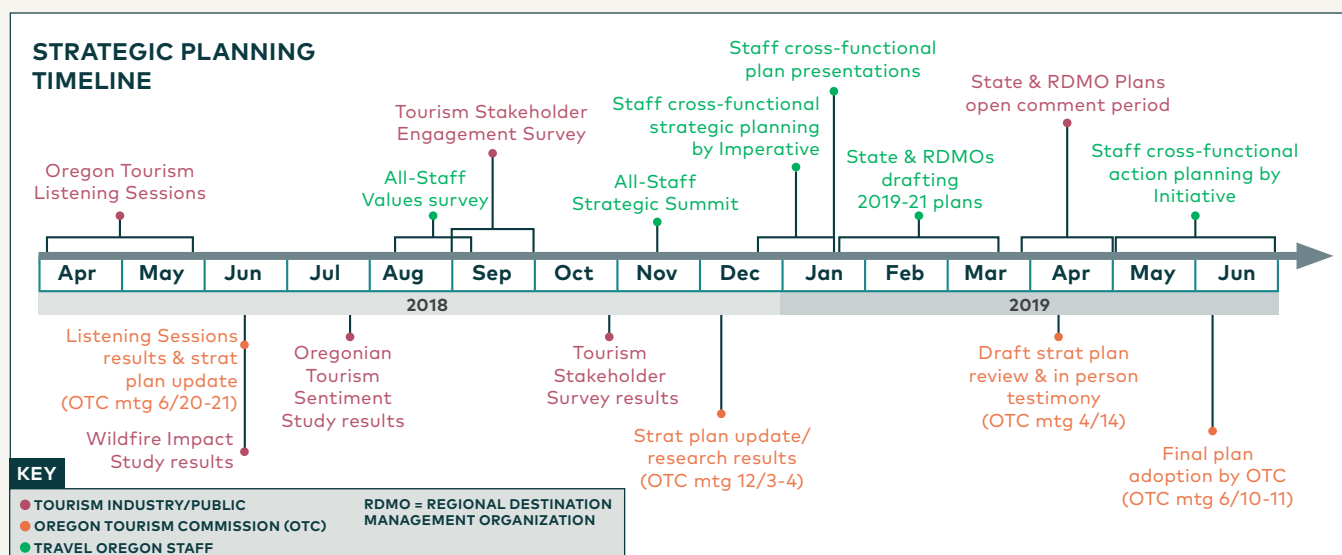
6/17/2019	adweek.com	"How Wine Companies Build Their Brands With Little Advertising"	A round up of wineries that have subtly, yet impactfully rebranded; includes Stoller wine.	Link
Link	cosmopolitan.com	"These Are the Best Cookbooks of 2019"	A round up of the best cookbooks; includes Salt&Straw cookbook, released at the NYC activation.	Link
6/17/2019	travelchannel.com	"Where to Honeymoon in Every State (Plus D.C. and Puerto Rico)"	A round up of the best honeymooning destinations around the country; includes Headlands Lodge.	Link
6/19/2019	bloomberg.com	"The Columbia River Gorge Is a Low-Key Food and Wine Paradise"	An article about the Hood River and the Columbia River Gorge; includes TO wildfire study mention.	Link
6/27/2019	foodandwine.com	"5 Delicious Ways to Support (and Enjoy) National Parks This Summer"	A round up of 5 brands that are partnering with National Parks Foundation, featuring Salt & Straw's June Camping Series.	Link

STRATEGIC PLANNING

In June, the commission adopted Travel Oregon's 2019-21 Strategic Plan, which guides our work with key initiatives and measurements — aligning staff, programs and investments around clear strategies. At the core of the plan is the reinforcement of our strategic evolution as a Destination Management Organization. This is a progression that reflects the maturity of Oregon's globally recognized tourism industry and is possible because of our long-standing, resolute focus on market-driven and responsive marketing, along with innovative sales, strategic partnerships and the robust development of new tourism products and experiences that we market and share with the world.

2019-2021 OVERVIEW

STRATEGIC IMPERATIVES			
OPTIMIZE STATEWIDE ECONOMIC IMPACT	SUPPORT & EMPOWER OREGON'S TOURISM INDUSTRY	CHAMPION THE VALUE OF TOURISM	RUN AN EFFECTIVE BUSINESS
STRATEGIC INITIATIVES			
Align and optimize Travel Oregon sales, marketing, development and partnership programs and empower the industry to do the same	Offer development and training opportunities to meet the needs of the industry	Grow and align strategic partnerships and stakeholder base to leverage resources and build capacity	Deploy agency-wide IT training on agency expectations and utilization of shared technology platforms
Facilitate the development of world-class tourism product and experiences with a focus on priority gap areas	Support and enhance an industry-leading information network as the trusted source for all things Oregon	Activate, engage and inspire new and existing advocates through compelling communication tools and messaging	Prioritize professional development and wellness through a diverse, equitable and inclusive culture of learning and continuous improvement
Support high-use destinations to manage the impacts that stem from visitation	Convene industry action networks to influence stakeholder action and increase collaboration	Improve industry and public feedback channel/process	Continuously improve, communicate and ensure alignment on policies and procedures
Inspire overnight leisure travel from key markets	Fulfill and respond to unforeseen opportunities and challenges as defined by Oregon's tourism industry		Establish cross-functional strategies in alignment with state and agency values to improve interdepartmental communication, workflows, productivity and outcomes Prioritize improvement of employee and industry engagement in identified areas of greatest need



RETURN ON INVESTMENT

DASHBOARD: 2018

TRAVEL IMPACTS SUMMARY

Spending (YOY) \$12.3B (4.2%▲)	Employment (YOY) 115.4K (2.9%▲)
Earnings (YOY) \$3.6B (8.9%▲)	Tax Receipts (YOY) \$1.3B (5.8%▲)

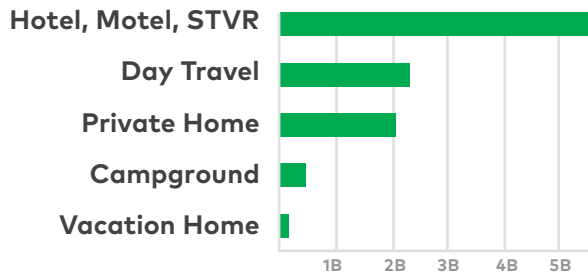
Source: Dean Runyan Associates

VISITOR VOLUME & AVERAGE SPENDING

Person Trips (YOY) 29.1M (1.1%▲)	Per Person Trip (YOY) \$287 (2.7%▲)
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Source: Dean Runyan Associates

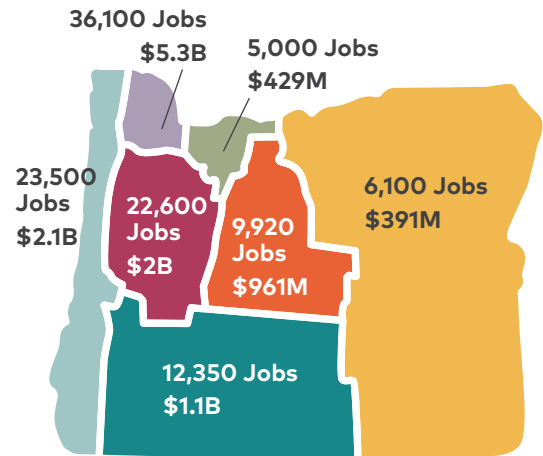
VISITOR SPENDING BY TYPE OF LODGING



	Value	% of Total	YOY Chg
Hotel, Motel, STVR	\$5575.6M	52.4%	3.8%▲
Day Travel	\$2290.4M	21.5%	3.7%▲
Private Home	\$2101.9M	19.8%	4.4%▲
Campground	\$478.4M	4.5%	4.2%▲
Vacation Home	\$189.3M	1.8%	2.2%▲

Source: Dean Runyan Associates

TOURISM EMPLOYMENT & REVENUE



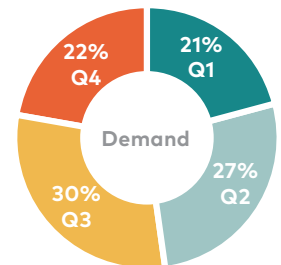
Source: Dean Runyan Associates

LODGING TRENDS (YOY)

Demand
15.9M (1.4%▲)

Revenue
\$1.96B (2.3%▲)

Occupancy
64.8% (-0.9%▼)

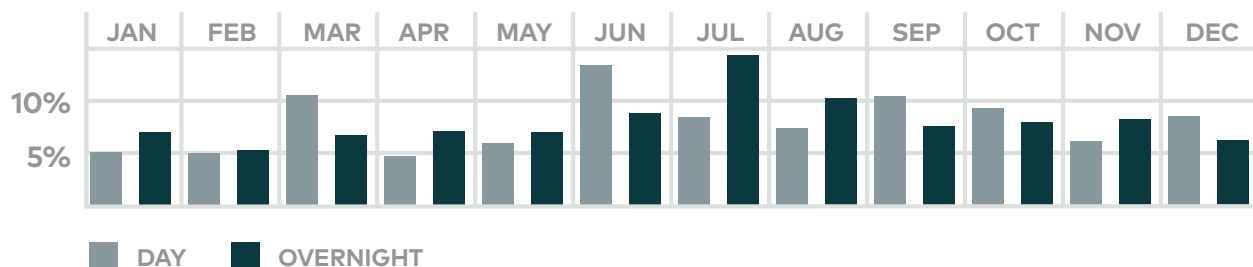


Source: STR, Inc.

Every \$1 invested in the 2017 Oregon ad campaign generated \$157 in visitor spending & about \$8 in state and local tax revenue.

Source: Longwoods

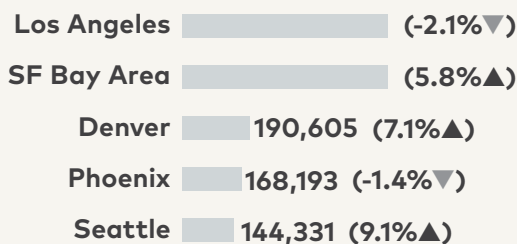
DOMESTIC TRIPS SEASONALITY



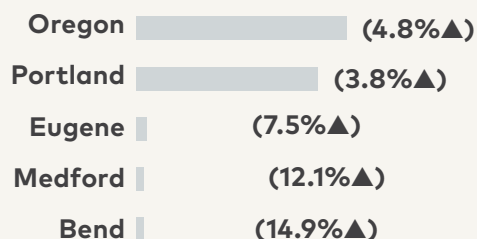
Source: Longwoods

DOMESTIC VISITOR AIR ARRIVALS

Top 5 Origin Markets (YOY)

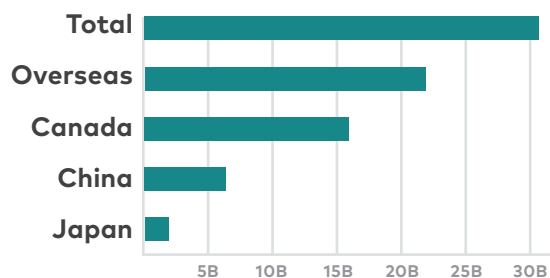


OR Airports (YOY)



Source: U.S. Department of Transportation (O&D Survey, T100), Dean Runyan Associates

TOP MARKETS: INTERNATIONAL SPENDING



Source: Tourism Economics

INTERNATIONAL SPENDING



Source: Tourism Economics

INTERNATIONAL VISITATION

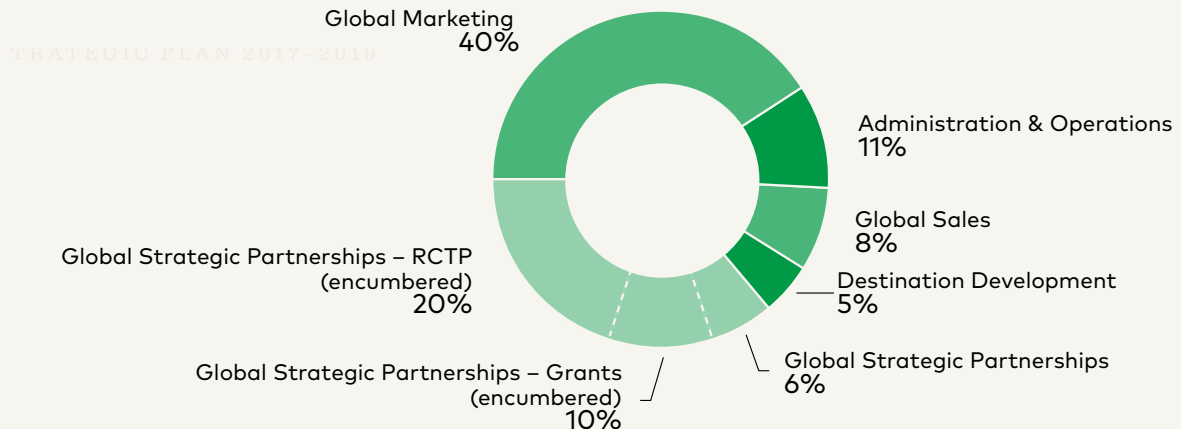
Volume (YOY)
1.1M (3.9%▲)

Spending (YOY)
\$1.4B (4.9%▲)

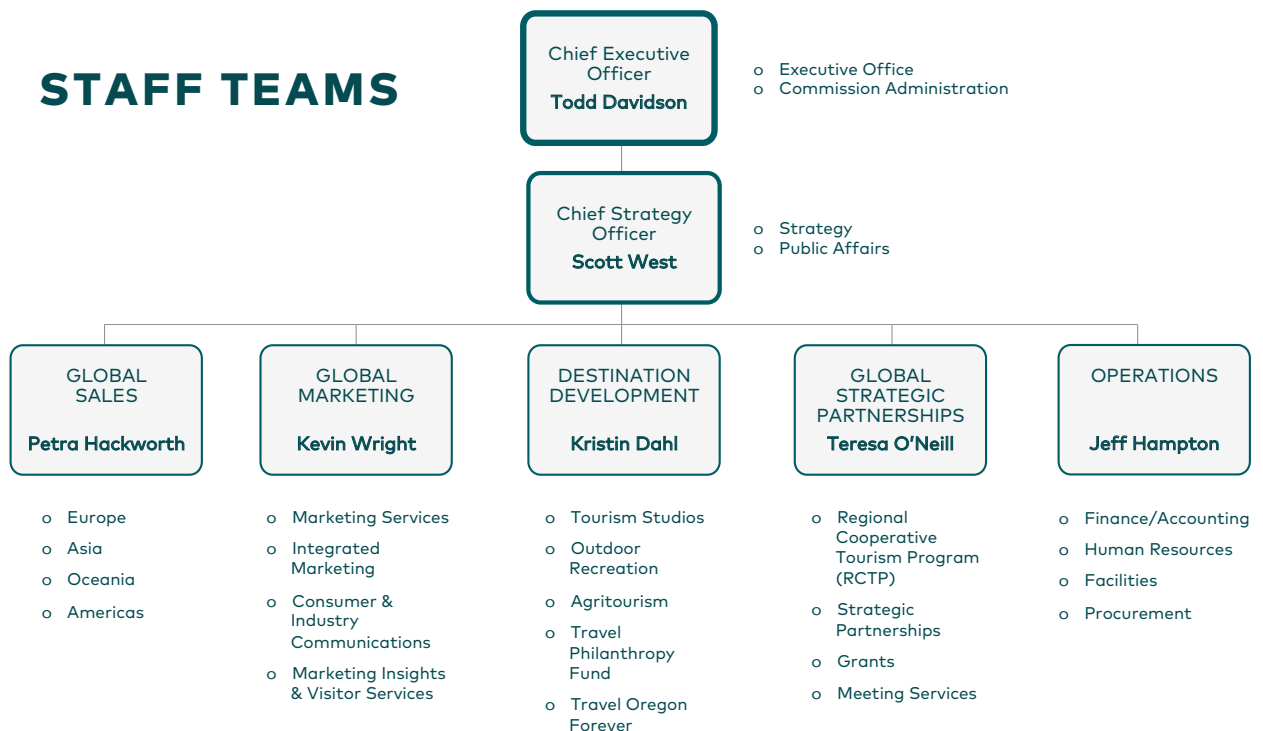
Source: Tourism Economics

2019-21 BIENNIAL BUDGET

State Lodging Tax Revenue	\$77,900,000
Other Sources	\$640,000
TOTAL	\$78,540,000
Global Marketing	\$31,101,000
Global Strategic Partnerships	\$4,350,000
Global Strategic Partnerships – Grants (encumbered)	\$7,790,000
Global Strategic Partnerships – RCTP (encumbered)	\$15,580,000
Global Sales	\$6,473,000
Destination Development	\$4,200,000
Administration & Operations	\$9,046,000
TOTAL	\$78,540,000



STAFF TEAMS





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