

TRAVEL OREGON

Destination Management Situational Analysis Tool

October 14, 2019

2019-2021 STRATEGIC OVERVIEW

IMPERATIVES			
Optimize Statewide Economic Impact	Support and Empower Oregon's Tourism Industry	Champion the Value of Tourism	Run an Effective Business
INITIATIVES			
<ul style="list-style-type: none"> Align and optimize Travel Oregon sales, marketing, development and partnership programs and empower the industry to do the same Facilitate the development of world-class tourism product and experiences with a focus on priority gap areas Support high-use destinations to manage the impacts that stem from visitation Inspire overnight leisure travel from key markets 	<ul style="list-style-type: none"> Offer development and training opportunities to meet the needs of the industry Support and enhance an industry-leading information network as the trusted source for all things Oregon Convene industry action networks to influence stakeholder action and increase collaboration Fulfill and respond to unforeseen opportunities and challenges as defined by Oregon's tourism industry 	<ul style="list-style-type: none"> Grow and align strategic partnerships and stakeholder base to leverage resources and build capacity Activate, engage and inspire new and existing advocates through compelling communication tools and messaging Improve industry and public feedback channel/process 	<ul style="list-style-type: none"> Deploy agency-wide IT training on agency expectations and utilization of shared technology platforms Prioritize professional development and wellness through a diverse, equitable and inclusive culture of learning and continuous improvement Continuously improve, communicate and ensure alignment on policies and procedures 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
KEY MEASURES			
<ul style="list-style-type: none"> Quantify variations in lodging demand, average length of stay and visitation volume to establish a baseline index of seasonal trends in overnight trip characteristics in year one and reduce seasonal variations across all regions in year two Increase Oregon's market share of total U.S. visitor spend (international and domestic) Monitor an index of destination management needs Grow strategic partner investment 	<ul style="list-style-type: none"> Increase stakeholder survey responses by 5 percent in each region* over the biennium and ensure statewide representation (*10 percent in Portland Region) Develop an aggregate measurement system for tracking industry engagement, set baseline and determine future growth 	<ul style="list-style-type: none"> In year one, set baseline of earned media and circulation that mentions economic impact and number of jobs; increase in year two by 10 percent Local travel and tourism investments remain stable or grow 	<ul style="list-style-type: none"> Meet or exceed executive branch performance expectations for reporting and accountability 100 percent of employees are trained on and engaged in agency work on culture, equity and inclusion 100 percent of staff trained on use of agency-wide established technology platforms, values, policies and performance expectations Maintain or improve employee engagement and satisfaction scores

2019-2021 STRATEGIC OVERVIEW

IMPERATIVES

Optimize Statewide Economic Impact

Support and Empower Oregon's Tourism Industry

Champion the Value of Tourism

Run an Effective Business

INITIATIVES

- Align and optimize Travel Oregon sales, marketing, development and partnership programs and empower the industry to do the same
- Facilitate the development of world-class tourism product and experiences with a focus on priority gap areas
- Support high-use destinations to manage the impacts that stem from visitation
- Inspire overnight leisure travel from key markets

- Offer development and training opportunities to meet the needs of the industry
- Support and enhance an industry-leading information network as the trusted source for all things Oregon
- Convene industry action networks to influence stakeholder action and increase collaboration
- Fulfill and respond to unforeseen opportunities and challenges as defined by Oregon's tourism industry

- Grow and align strategic partnerships and stakeholder base to leverage resources and build capacity
- Activate, engage and inspire new and existing advocates through compelling communication tools and messaging
- Improve industry and public feedback channel/process

- Deploy agency-wide IT training on agency expectations and utilization of shared technology platforms
- Prioritize professional development and wellness through a diverse, equitable and inclusive culture of learning and continuous improvement
- Continuously improve, communicate and ensure alignment on policies and procedures
- 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

KEY MEASURES

- Quantify variations in lodging demand, average length of stay and visitation volume to establish a baseline index of seasonal trends in overnight trip characteristics in year one and reduce seasonal variations across all regions in year two
- Increase Oregon's market share of total U.S. visitor spend (international and domestic)
- Monitor an index of destination management needs
- Grow strategic partner investment

- Increase stakeholder survey responses by 5 percent in each region* over the biennium and ensure statewide representation (*10 percent in Portland Region)
- Develop an aggregate measurement system for tracking industry engagement, set baseline and determine future growth

- In year one, set baseline of earned media and circulation that mentions economic impact and number of jobs; increase in year two by 10 percent
- Local travel and tourism investments remain stable or grow

- Meet or exceed executive branch performance expectations for reporting and accountability
- 100 percent of employees are trained on and engaged in agency work on culture, equity and inclusion
- 100 percent of staff trained on use of agency-wide established technology platforms, values, policies and performance expectations
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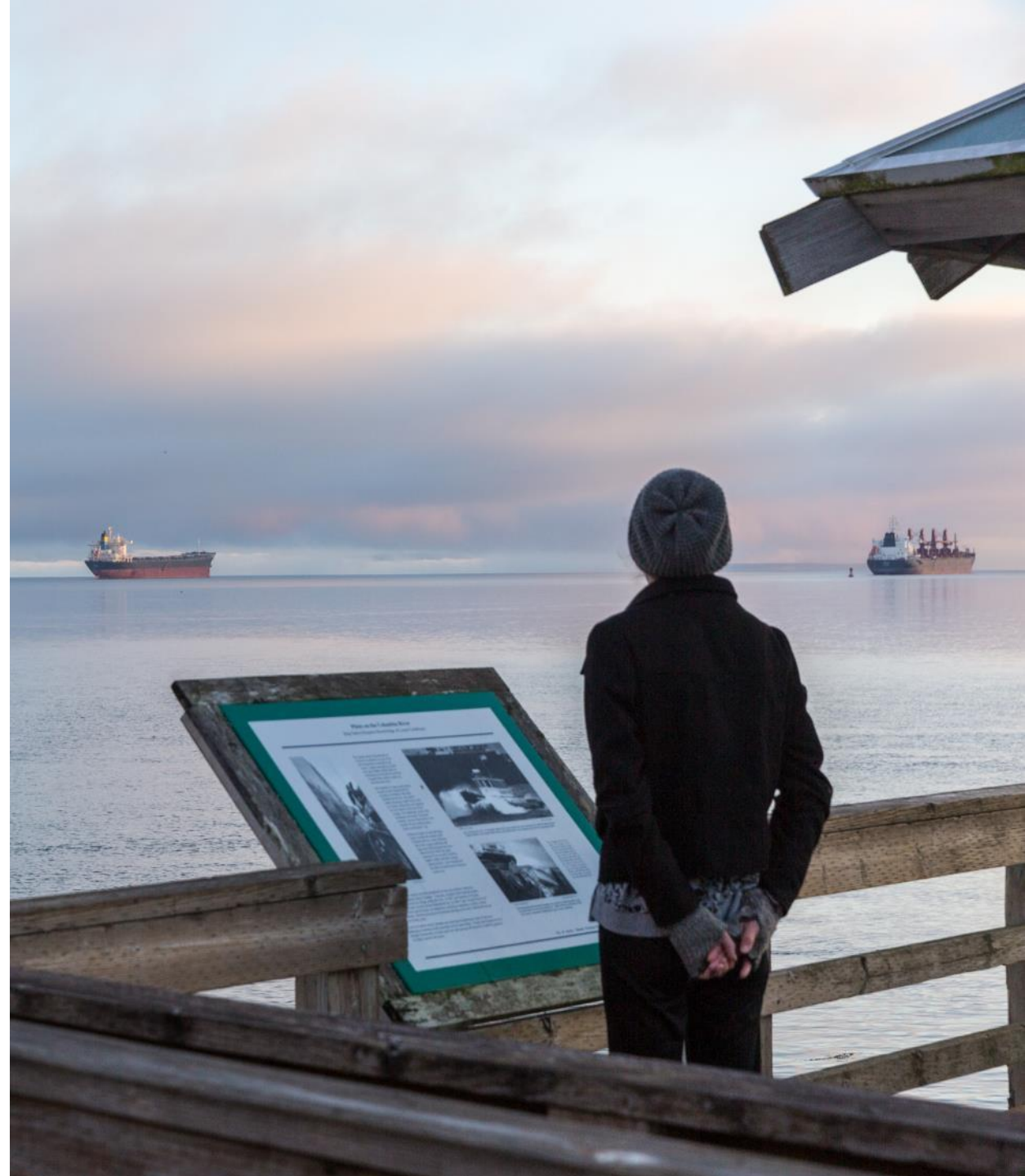
BACKGROUND

- Travel Oregon continues to evolve into a Destination Management Organization
- We've identified a broader set of destination issues and related solutions to lead, support or advocate on
- Our 2017-2019 strategic plan had a key measure to develop a baseline of destination management needs
- Our 2019-2021 strategic plan has a key measure to monitor an index of destination management needs



OVERVIEW OF TOOL

- Visualizes data collected through research by displaying it onto a heat map of Oregon at a zip code level
- Helps Travel Oregon prioritize future work in destinations
- Supports the initial work of the cross functional action teams working to support high-use destinations and develop world-class experiences in gap areas



OPPORTUNITIES ANALYZED

1. Manage tourism growth and protect assets
2. Alleviate congestion during peak seasons
3. Increase off-peak visitation
4. Create positive interaction between tourists and residents
5. Educate community leaders and policymakers on value of tourism
6. Identify and foster partnerships to mitigate impacts
7. Influence an ethos of conservation and sustainability
8. Increase the adoption of sustainable business practices



DATA COLLECTION

Initial data was collected from:

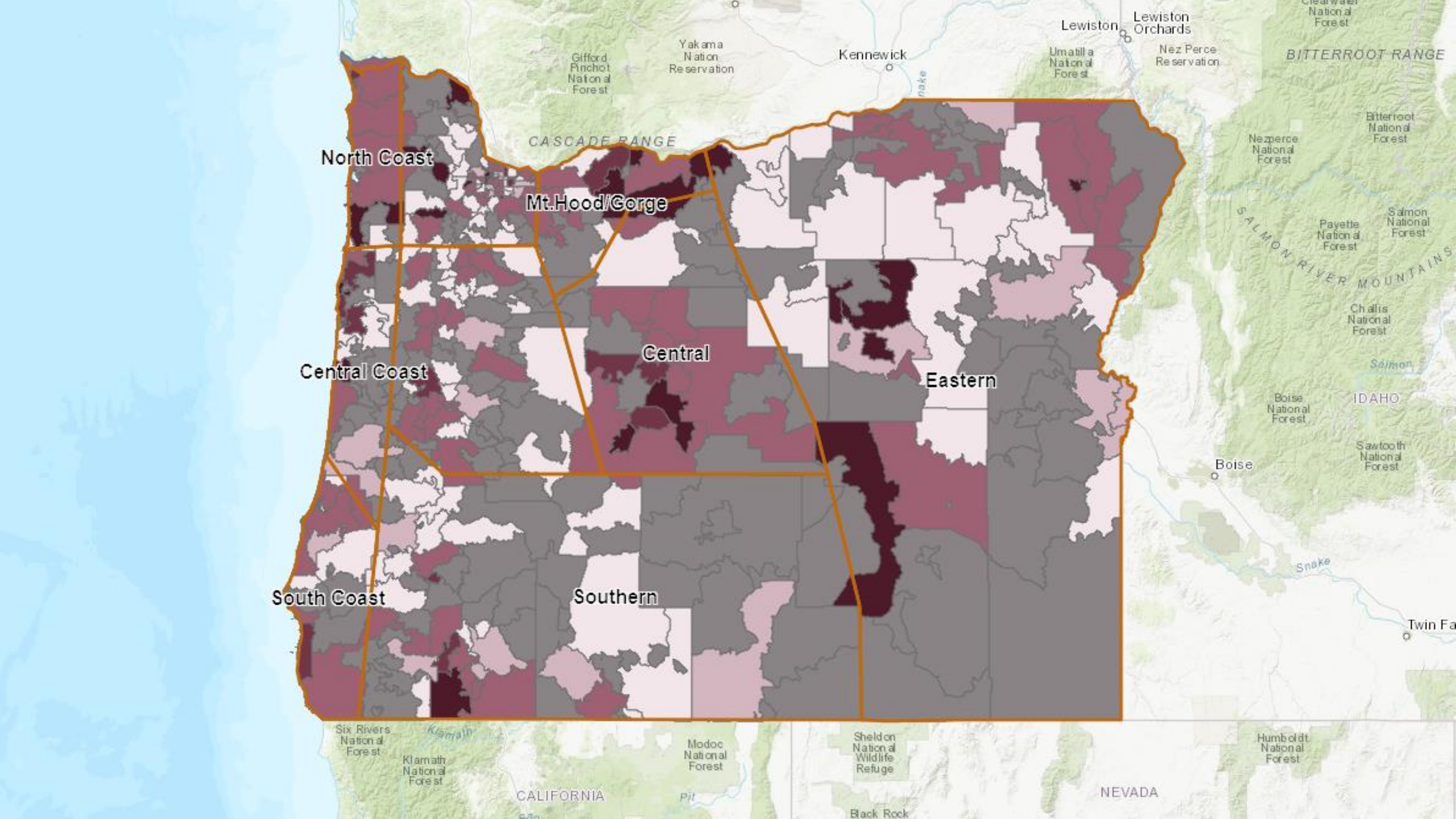
2018 Engagement Survey

- Open from August 2018 to September 2018
- Received more than 1,520 responses
- Used a 5-point scale

2018 Resident Sentiment Study

- Open from June 2018 to September 2018
- Received more than 1,470 responses
- Used a 5-point scale





LESSONS LEARNED

- We developed a replicable methodology that is already informing future research
- We learned how to improve survey designs related to:
 - Capturing geography
 - Measurement scales
 - Distribution and outreach
- We validated previous assumptions
- We have a new way to easily digest data to make informed decisions



A scenic photograph of two mountain bikers riding along a narrow, rocky path that leads into the ocean. The path is flanked by large, dark, textured rock formations. The bikers are wearing helmets and casual riding gear. The lead biker is in the foreground, splashing through shallow water, while the second biker follows closely behind. The background features a large, prominent rock formation on the left and a hazy, golden sunset sky. The overall mood is adventurous and serene.

THANK YOU