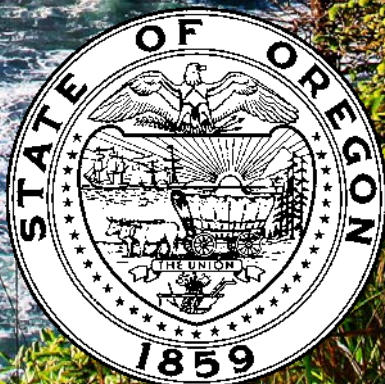
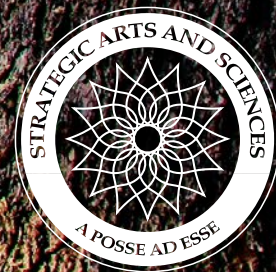


OREGON TOURISM INDUSTRY ACTION PLAN

2014 - '16



Report produced by
Strategic Arts & Sciences

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First Readers

This report could not have been completed without the careful review and guidance offered by the following generous volunteers serving as First Readers.

- Alice Trindle, Eastern Oregon Visitors Association
- Danielle Cowan, Executive Director, Clackamas County Tourism & Cultural Affairs
- Kristin Dahl, Director, Destination Development, Travel Oregon
- Carolyn Hill, Southern Oregon Visitors Association
- Tom Hogue, Economic Development Specialist, Department of Land Conservation Development, State of Oregon
- Shawn Irvine, Economic Development Director, City of Independence
- Scott West, Chief Strategy Officer, Travel Oregon
- Kari Westlund, Travel Lane County

Industry Focus Meeting Participants

Alice Trindle, Eastern Oregon Visitors Association	Kerrie Walters, Grants Pass Tourism
Anne Jenkins, Travel Medford	Leslie Scott, Oregon Truffle Festival
Ashley Massey, Oregon State Marine Board	Liora Sponko, Lane Arts Council
Bill Cross, ODMO	Lisa Dawson, NE Oregon Economic Development District
Billie Moser, Travel Portland	Mark Halley, Moss Springs Packing
Bob Morus, Phelps Creek Winery	Mary Pat Parker, Visit Corvallis
Bob Hackett, Oregon Shakespeare Festival	Michael Donovan, Irvine Family Vineyards
Brad Niva, Rogue Wilderness Adventures	Natalie Inouye, Travel Lane County
Brad Hicks, The Chamber of Medford/Jackson County	Nigel Francisco, Ninkasi Brewing
Brian Sykes, Oregon Rafting	Pat Beard, Pendleton Chamber of Commerce
Carolyn Hill, Southern Oregon Visitors Association	Pat McShane, InnSight Hotel Management Group
Chris Dent, BLM, Recreation & Rivers	Pierre Zreik, Allison Inn
Chris Lake, Umpqua Community College	Robb Bell, Cathedral Ridge
Chris Bebo, Provenance Hotels	Robert Canaga, Travel Lane County
Christine Collier, Willamette Valley Vineyards	Roger Fuhrman, ODFW
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David Millman, Domain Drouhin	Sean Robbins, Business Oregon
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Erik Andersson, Pacific Power	Sheryl Kelsh, Chehalem Valley Chamber
Geoff Laird, Rogue Canyon Outfitters	Stephanie Seamans, Confederated Tribes, Umatilla Reservation
Ginger Savage, Crossroads Carnegie Art Center	Steve Thomson, King Estate
Greg Newland, Travel Portland	Steve McCoid, ORLA
Holly Howell, Port of Cascade Locks	Tim Kennedy, Don Carlo Vineyard
Jeanette Pilak, Sisters Outdoor Quilt Show	Todd Montgomery, OSU-Cascades
Jennifer Roe, Roe Outfitters	Tom Danowski, Oregon Wine Board
Jim Bernau, Willamette Valley Vineyards	Tom Hogue, Department of Land Conservation & Development
Jon Rahl, City of Seaside Visitors Bureau	Tomi Douglas Anderson, City of Eugene
Karen Schaaf, West Columbia Gorge Chamber	Valerie Warren, Visit Bend
Kari Westlund, Tourism & Hospitality Consortium	Vijay Patel, A-1 Hospitality Group
Katera Woodbridge, Lincoln City VCB	Wayne Bailey, Youngberg Hill Vineyards
Ken Wright, Ken Wright Cellars	Wayne Purcell, Riverhouse Hotel
	Zach Collier, NW Rafting Company



STATEWIDE TRAVEL & TOURISM INDUSTRY ACTION PLAN

Part 1: Background & Long-Term Vision

There is an “Oregon” point of view, and like most magical things it is hard to define. It involves a passion for the outdoors and respect for the land, water and sky. It celebrates creativity, independence, common sense and craftsmanship. Of course it is also part of the Oregon point of view to discuss, engage and take action.

The starting point for this plan, this conversation, this call to action, is the simple belief that we have something special here in Oregon. We feel it in our hearts, and hundreds of thousands of visitors from around the world tell us every single day. We have been listening to those people, to see what *they* see; the wonder at exploring and discovering nature’s beauty first hand, the simple joy of farm to table cuisine; the magic of an amazing wine or craft brew shared by friends; a chance to be a part of an exuberant and creative culture.

The rest of the world wants the Oregon Experience. And we are getting better and better at making that experience available to more and more people from more and more countries—statewide, all seasons.

If you are paying attention you might now ask, “Who is the ‘we’ of which you speak?” “Who ‘gets’ it?” The “we” are talented, engaged, future-focused people in Oregon’s travel and tourism industry. We recognize the powerful opportunity for coordinated action to optimize the potential for sustainable economic development.

The industry accounts for 9.6 billion dollars a year in revenue and 94 thousand jobs. Some of us may not even be aware of the fact that we are part of the industry. If you are reading this document, you should go ahead and count yourself “in.” Our simple goal is to identify shared priorities that will help move Oregon’s travel and tourism industry forward—and to set in motion the means to accomplish real work. We see the action plan working to achieve short term goals as well as guiding sustained and long term efforts. The results of that work will show up as a better Oregon Experience for our visitors, environmental and lifestyle sustainability for Oregon communities, and a chance to set the global standard for year round economic development through tourism.

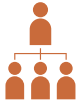
In 2014, Oregon’s Tourism and Hospitality Industry Consortium (Consortium), in partnership with Travel Oregon, invited stakeholders from a variety of Oregon tourism industry groups and guilds to participate in a survey and series of focus group sessions designed to identify key priorities for a statewide Industry Action Plan for 2014-16.

Strategic Arts and Sciences (SAS) assisted in the facilitation of cross-industry conversations and the administration of the survey and industry poll. This effort is an extension of the regional industry “Listening Sessions” that were conducted across the state in 2013 to incorporate regional-specific

perspectives, needs, and desires into the Travel Oregon’s 2013-15 Strategic Plan. This effort builds on that foundational work to call out points of focus and shared values across the industry and prioritize *action steps* that industry leaders are willing and able to engage in. In other words, this is not about redefining a strategic vision for the industry but is instead about getting real work done!



TWO-YEAR CYCLES. Every two years the Action Plan will be updated to continue to work in alignment with the Travel Oregon Strategic Plan, with alternating planning years (2014-16 Industry Action Plan, 2015-17 Travel Oregon Strategic Plan, and so on).



LEADERSHIP. Action Plan projects will be chartered and supported under the leadership of the Tourism & Hospitality Industry Consortium.

The Industry Vision

The following ideas came from the ongoing conversations and efforts to define and develop the Oregon Experience. There are several elements that we are confident show up whenever anyone discovers and defines the Oregon Experience for themselves.

THE OREGON EXPERIENCE IS:

- Authentic
- Inviting exploration
- Connected to nature
- Shaped by craftsmanship and quality
- Aesthetic, beautiful
- Widely accessible

WE CAN ALSO SAY WITH SOME CONFIDENCE WHAT THE OREGON EXPERIENCE IS NOT:

- A manufactured destination
- Ostentatious and flagrantly expensive
- Passive
- Inhospitable or unfriendly
- A rip-off or bad value

Feel free to add to these lists. In fact, we would love for you to go to the Oregon Experience Industry Action Plan website [\[insert link to new website here\]](#) and help us refine our definitions of what is and what is not the Oregon Experience.

Whatever the Oregon Experience is, it is at the heart of what we want to offer visitors in Oregon. But the intentionally vague and personal definitions of the Oregon Experience are not enough to build an Action Plan around. We need a true “industry vision” to guide our actions. Oregon’s travel and tourism industry is emerging as Oregonians take a fresh look at our state, its stunning resources, and the rest of the world. We are realizing just how good we have it here. We want to protect what we have. We want to share it with others. We want it to continue to be vibrant long into the future. For all of that to happen, travel and tourism must serve as a powerful economic engine for the state. Not just economically “viable.” Not “break even.” The vision we are describing is one where travel and tourism dollars are a major pillar of our state’s overall economic health.

There are two major contentions against the idea of developing (and depending on) a robust travel and tourism industry. The first has to do with the belief by some that the industry does not provide living wage jobs. The second is that tourism is an industry that depends on a healthy national and global economy; we could have an outstanding industry with no visitors if the world economy is in upheaval. It is not the goal of this document to debate these perspectives. For more information, we

encourage you to check out the facts on the impact of the industry to Oregon’s economy at this link [\[insert website link\]](#). **Every** job in Oregon has value. The tourism industry in Oregon doesn’t apologize for offering entry level positions. In fact, the industry offers opportunities to Oregonians where transferable skills necessary for long-term vocational success are learned in addition to the multi-career opportunities that it provides throughout the state. **Every** industry is dependent on national and international economic vitality. But, the travel and tourism industry is powerful precisely because it simultaneously protects and monetizes Oregon’s resources while it invites green, agricultural, craft and artisan-oriented industries to thrive.

This is why the Action Plan includes the voices of Oregon’s wine industry, craft brewers and distillers, farmers, chefs, guides and artists. It is also supported by land use planners, governmental agencies focused on resource management, information science industries, universities, hospitals, hoteliers, and roads-rail-ships-airport professionals. Travel and Tourism is an industry that enables and benefits from the success of other complementary businesses in the state.

20-Year Vision

During one of the listening sessions, at a break, a participant said,

“There are regions in Italy where you see the combination of beautiful countryside’s and villages, amazing food and wine, and then you see that the people seem to be living in a way that answers the big question, ‘What’s the meaning of life?’.”

This same harmony, this same potential, this same experience is present in Oregon. To the degree that people are able to travel, learn, and explore, Oregon will always be on the top of the list of rare and magical places where people connect with core life values. Oregon can’t be built or engineered. It can’t be replicated. It is one of a kind, and therefore it is a treasure to be managed with the profound care that will ensure Oregon thrives for hundreds—or thousands of years into the future.

In this high speed digital world, it is not fashionable to talk about planning beyond a few months or years. But this plan sets out to look well into the future, while keeping our eyes on the choices we are making today. We know that this amazing place exists in a delicate balance of weather, water, geology, trees, wildlife, and people. The promise of a long term vision for Oregon is to learn how to share our treasure with the world—without destroying the treasure in the process.

The travel and tourism industry is successful when:

- Every community in Oregon acknowledges and benefits from the steady flow of international and domestic visitors.
- Oregon is recognized internationally as a state that is “doing tourism right;” for the visitors and for the state’s precious wild and scenic resources.
- Oregon manages the growth of the industry to ensure economic strength and consistent quality in the Oregon Experience.
- Oregon offers formal and informal training to people throughout the state to deliver a consistent and outstanding visitor experience.
- Oregon leverages the power of communication technology to assist travelers as they plan, enjoy, and relive their Oregon Experience.
- Travelers extend their experiences with the purchase of Oregon products and services after their trip.

Oregon’s travel and tourism industry is recognized as the global standard for delivering unsurpassed authentic visitor experiences and optimizing economic success without damaging or degrading the natural world at the heart of the Oregon Experience.

Being Oregonians we know you will want to word-smith, amend, debate, and flat-out contradict a lot of how we have described this long term vision. In fact we are kind of counting on it. That’s why we want you to add your voice, critique, ideas, and changes by following this link [\[insert website link here\]](#).

Vision Narrative

Visitors from around the world continue to discover the wonder of the Oregon Experience. They have heard from their friends about the amazing vistas, food, and wine. They have read about the history of the state and the story told in the geography and wilderness. They come year round and they have found the Oregon Experience is by no means limited to the summer months—or one zip code or another. Before they even arrive they are a part of a larger conversation with people who made a similar trip last year—or last week. After they return they are framing pictures of Crater Lake or rapids in the Deschutes to remind them every day of the feeling of life and connection that they experience firsthand.

Visitors are always impressed with how easy it is to plan a trip, discover whole regions, meet local people and artisans, and challenge themselves at whatever level they seek. Savvy visitors know, however, that the personal challenge is an essential part of the experience. It is the thing they must do for themselves. It is where the Oregon Experience unfolds and pays off in ways that are as distinct as every individual traveler.

Visitors marvel at the balance we have achieved; welcoming thousands of people to pristine wilderness areas and keeping the guide ropes and rules to the exact minimum necessary to protect those wilderness areas and ensure a great experience for everyone. They recognize that Oregonians love sharing where they live, work, and play. They love inviting people into the world of fishing, skiing, cycling, cooking, hiking, and living that is so natural in Oregon.

And visitors appreciate the value they experience. Their jaws drop when they appreciate that every inch of the Oregon Coast is accessible to all, all the time. They are shocked that the people of Oregon have avoided the kind of price inflation that affects other destinations. They have a moment of deep appreciation for the quality they experience at every step of their journey. They are happy to come back; happy to refer their friends and family; happy to stay a little longer and spend a little more. They see themselves as a part of a virtuous cycle where their dollars actually help make Oregon better.

Taking Action

The key word in this whole document is “action.” We want stuff to get done. We want problems to be solved. We want things to get better. For those of us close to the industry, we have come to lean on Travel Oregon for leadership and resource support in these efforts. And Travel Oregon is an active participant in convening the meetings and facilitating the writing associated with this Action Plan. But Travel Oregon has a plate full of goals, initiatives and challenges that are core to their Strategic Plan to drive economic growth by optimizing the marketing, sales & development resources of the state.

So this Action Plan is a formal invitation for *everyone* to get involved and to help out as they can.

Here is a basic hierarchy of “action” for you to consider:

AWARENESS: Yep, just being aware of industry issues can be a big help. Being actively aware means that you will think about the impact on potential tourism as new businesses are developed, as land use choices are made, and as resources are spent in your community. You will learn what you can about the industry—and hopefully stand as an active supporter of the goals of the industry for Oregon’s long term future.

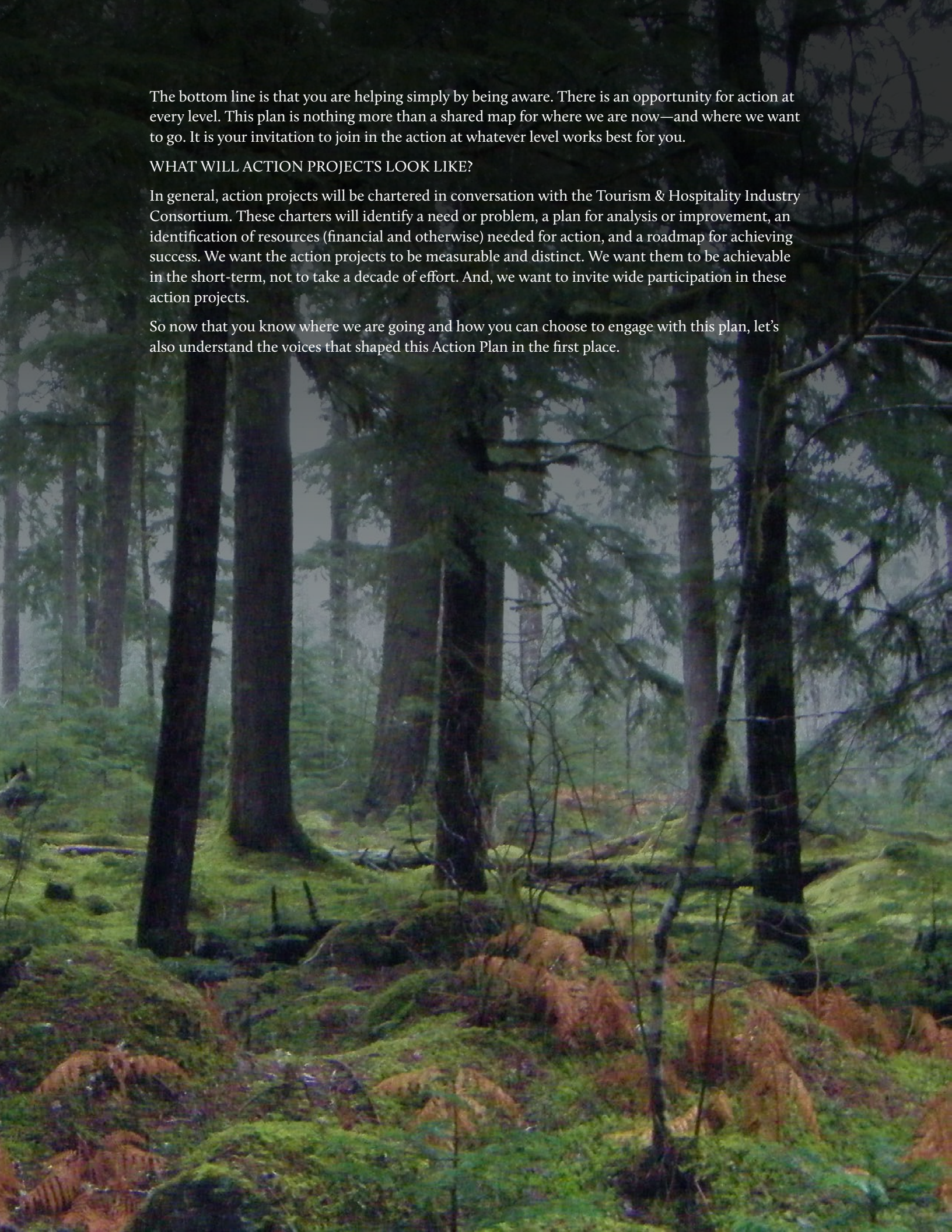
COMMUNICATOR: As a communicator you are not only aware, but you are willing and able to engage with other formal and informal leaders about issues related to travel and tourism. You are ready to be at the table to speak to why the industry is important. You are able to offer current facts and figures about the industry’s economic impact.

AMBASSADOR: Now you are really a part of the tribe. You are actively working to bring the message of travel and tourism to everyone around you. You are an advocate for the state; you are a contributor to social media extolling the wonder of the Oregon Experience; you are an active networker looking to put people in touch with one another to make your community that much more attractive to potential visitors.

GUILD LEADER: Your passion might be making wine, but you see the connection between your passion and the people who come here from around the world. You recognize that they may have come for the wine, but their assessment of the experience is much richer and more complex. You are ready to work with hoteliers, restaurateurs, artists, city officials, transportation professionals, educators and the like to help complete a full-featured experience for visitors.

ACTION LEADER: Now you are working to tackle a specific challenge. It may have been identified formally in this plan, or it may be an issue that is urgent and demanding. You are making the calls to help pull together the resources, expertise, and plans to make the Oregon experience better. You are not in it for the credit or the money (there probably won’t be much of either). You are acting because it is the right and important thing to do.

INDUSTRY LEADER: Through many successful efforts you have achieved a level of credibility and confidence that is respected by people throughout the travel and tourism industry—as well as within other major institutions like state government, manufacturing, education, and medicine. You are asked to speak about the state of the industry; to give support or challenge to ideas for the future, to act as a center of gravity to attract resources for large, multi-year, transformative projects.

A misty forest scene with tall evergreen trees and a forest floor covered in moss and ferns. The trees are dark and stand against a light, hazy background. The ground is covered in vibrant green moss and brown ferns, creating a rich, textured foreground.

The bottom line is that you are helping simply by being aware. There is an opportunity for action at every level. This plan is nothing more than a shared map for where we are now—and where we want to go. It is your invitation to join in the action at whatever level works best for you.

WHAT WILL ACTION PROJECTS LOOK LIKE?

In general, action projects will be chartered in conversation with the Tourism & Hospitality Industry Consortium. These charters will identify a need or problem, a plan for analysis or improvement, an identification of resources (financial and otherwise) needed for action, and a roadmap for achieving success. We want the action projects to be measurable and distinct. We want them to be achievable in the short-term, not to take a decade of effort. And, we want to invite wide participation in these action projects.

So now that you know where we are going and how you can choose to engage with this plan, let's also understand the voices that shaped this Action Plan in the first place.

Part 2: Industry Feedback

Strategic Arts and Sciences implemented the following feedback gathering process to produce the Action Plan:

1. **Industry Survey** (anonymous, electronic)
2. **Industry Poll** (conducted “live” through audience voting technology at the 2014 Governor’s Conference)
3. **Focus Group Sessions**

The focus group sessions invited industry “guild” groups to engage in discussions facilitated by Strategic Arts and Sciences consultants Randy Harrington and Carmen Voilleque in 3-hour sessions held in various locations around the state. The focus group conversations focused on perceptions of the industry today, vision and optimization of “The Oregon Experience”, focus and priorities for the next two years, and action steps with a willingness to participate.

This Action Plan provides key themes and directives that emerged from the feedback gathering process. More detailed summary reports of each focus group as well as survey and polling data are available through Travel Oregon.

1. Industry Survey

The survey included participants from a diverse range of industry groups including visitor attractions, public activities, lodging, agritourism, wineries, craft beer, food and restaurants, golf, transportation and marketing.

HIGHEST PRIORITIES FOR THE ACTION PLAN ACCORDING TO SURVEY RESPONSES:

- 86%** Rural Tourism
- 83%** Transportation
- 73%** Natural Resources
- 69%** Recreation on Public Lands

THE LOWEST RATED PRIORITIES INCLUDED:

- 45%** Food Manufacturing
- 41%** Activity Regulation

In addition to rating individual questions, there were several survey comments that added more perspective to top priorities for the Action Plan. The following list represents the Top Ten Priorities (in no particular order).

- Funding
- Winter Tourism
- Rural Tourism
- Industry Influence/Respect
- Partnerships/Collaboration
- Infrastructure
- Transportation
- Regulations
- Marketing & Awareness
- Messaging & Telling Our Story



2. 2014 Governor’s Conference Poll

A live audience poll was conducted at the 2014 Governor’s Conference on Travel and Tourism that confirmed our assumption that industry leaders view travel and tourism as one of the most important drivers of Oregon’s economic success. Specific questions asked and data gathered at the conference are listed in the Appendix.

3. Industry Focus Groups

Strategic Arts and Sciences met with the following industry groups:

GUIDES & OUTFITTERS



WINERIES



ARTS & CULTURE



ECONOMIC DEVELOPMENT



ORLA (RESTAURANTS & LODGING)



ODMO & CONSORTIUM MEMBERS



A high-level summary of key themes, priorities and action items for each industry group session follows.*

**Note: Full session summary reports for each industry session can also be obtained through Travel Oregon.*

Industry Strengths

It wasn't hard for each group to list the many strengths of Oregon's tourism industry now and in the future.

- Collaboration Leadership
- Product
- Shared Values Funding
- National Name Recognition
- Forecasting
- Diverse Experience
- Portland Tourism
- Authenticity
- Reputation
- Culinary Destination
- Agricultural Sector
- State Pride
- Authentic Businesses
- State Pride
- Natural Resources
- Accessibility
- Diverse Attractions
- No Sales Tax
- Culture
- Collaboration
- Quality
- Weather
- Physical Beauty
- Wine & Beer
- Partnerships
- Strong Brand
- Arts & Crafts
- Artisan Culture



Guides & Outfitters

No group embodies Oregon’s adventurous spirit better than the Guides and Outfitters. These are people who have grown up in the Oregon wilderness, logging thousands of trips through the back country and down Oregon’s scenic and wild rivers. There are fishers, outdoors experts, whitewater specialists, snowshoe and cross country ski guides, wildlife enthusiasts, hunting guides—and more. They share a reverence for Oregon wilderness. They are quick to laugh and joke. And they speak with candor and intensity about protecting Oregon’s natural beauty.

The Guides and Outfitters are an interesting group because they are consummate outdoors people, yet they are on the front line of dealing with the intensive bureaucratic, regulatory challenges enforced by the Bureau of Land Management, U. S. Forest Service, Department of Fish and Wildlife, Parks and Recreation Departments, and the Department of Transportation (among others). As one participant said, *“The good news is that we all want the same thing; to protect our wilderness.”* The other good news is that representatives from these agencies were a part of this conversation—and are in an ongoing conversation with the Guides and Outfitters to work out solutions to the practical challenges that come up when people get up close and personal with wilderness and wild rivers.

FEEDBACK HIGHLIGHTS:

- **Participation.** Most of us are small business owners so it can be hard to get an invitation for a “seat at the table”, but we are willing to volunteer and participate.
- **Point Person.** Assigning a point person or coordinator for the guides and outfitters would make a big difference in facilitating our participation in efforts.
- **Partnerships/Alignment.** With each other, agencies, and Travel Oregon. An integrated platform for Guides & Outfitters to communicate and collaborate would be valuable.
- **Oregon & Border-state Focus.** Oregon, California, Idaho and Washington are the main source of our guides and outfitters tourism business.
- **Land & Water Use.** BLM strategy, Forest Service strategy and trail maintenance, Oregon State Marine Board, regulations, etc.
- **Repeat Visitors.** Most of our clients are repeat visitors –people from Oregon or neighboring states that visit at least once a year.
- **Authenticity.** An “authentic” Oregon experience is to see the country and all it has to offer with a local guide.
- **Promotion.** More specific data and marketing for Guides & Outfitters would help us as we are small businesses. We need to best leverage the work Travel Oregon is doing.



Wineries

Oregon wines continue to find themselves in the top ten lists of wine enthusiasts from around the world. *“When you look at the range of varietals, the quality, and the volume of wine we produce, there is little doubt that Oregon is one of the premier wine regions in the world,”* remarked one of the session participants. With all the awards and accolades about Oregon wines, you might think the wine makers and industry professionals would be aloof or pretentious; but you would be wrong. *“We get along, we help each other, and we are in this together.”* That sentiment, along with equal parts determination, scientific curiosity, attention to detail, humility, and humor set the tone for one of the most compelling conversations in this effort.

Wine is huge in Oregon. It is a major industry in and of itself, and it is a centerpiece to Oregon’s travel industry. People discover Oregon as a glass of pinot noir is poured in Florida, London, or Hong Kong. People come to Oregon to see and experience our rich wine regions first hand. Wine was one of the major common denominators identified by most other industry groups as a “defining feature” of Oregon’s attraction as a destination.

After listening to these professionals weigh in on the industry, it is also clear that wine is a complex industry. It is competitive and dependent on a wide range of variables over which wine makers have little control. It is an industry with one foot in classic agriculture—and another foot in agricultural tourism. You have to be a farmer, a winemaker, and tourist guide all at the same time.

It is not that these people were complaining. Far from it. Instead their observations spoke to a deep awareness of the complex ecosystem on which the wine industry depends. This was a practical, real world conversation highlighting steps that will make the wine industry a better steward of the land—and a better partner in fulfilling the promise of The Oregon Experience.

FEEDBACK HIGHLIGHTS:

- **Annual Calendar.** Monthly focus areas for the tourism industry everyone can plan toward.
- **Winter Tourism.** We need to focus on winter events to attract visitors.
- **Research & Data.** Gather data on wine visitor behaviors for marketing & advocacy.
- **Cross-Industry Facilitated Conversations.** Wine, beer and spirits should all be talking.
- **Visitor Targeting.** The typical wine country visitor is of an affluent demographic. We need to know more about those visitors—what they want, what they like to do, what else they are looking for in a visit. A wine-consumer focused tourism study would be highly valued.
- **Messaging/Message Coordination.** Promoting the wine industry and assisting us with message coordination. Travel Oregon is likely doing a lot more than any of us know because most of us are owner-operated and focused on our business and don’t know what we should be leveraging.
- **Funding.** Funding is always an issue, and in our industry it is critical. We need to fund winery promotion as it can help a lot of other aspects of the region as well.





Arts & Culture

“We think arts and culture should be a part of everything.”

This sentiment was at the heart of a wonderful conversation about the power of arts and culture to make, well, *everything* better.

“The farmers in Eastern Oregon get it; they know the best way to tell their story is through art.”

“Art and culture are the anchors that attract tourists and businesses to a region. It is what defines quality of life.”

The group was represented by artists, educators, and world class performing arts resources like the Oregon Shakespeare Festival.

As you might imagine, they were not shy. What you might not guess is how business savvy they were in their analysis and suggestions.

“We know budgets are tight, we know we have to do for ourselves, and we know we can make things better.”

The group recognized the importance of understanding the data in the industry, and of forming strong relationships with governmental, educational, and business partners. The Arts and Culture group was also clearer than most on how to leverage their existing infrastructure to galvanize action efforts and get real work done.

FEEDBACK HIGHLIGHTS:

- **Collaboration.** The arts contribute to all areas of tourism – regional, attractions, food/beverage, lodging, museums and heritage – everything. We want to work with everyone.
- **Cross-Industry Facilitated Conversations.** What is the leadership structure in the industry and how do we participate and gain access? How do we align better with other partners? For us to collaborate we need someone to “handle the day” – bring people together and be the catalyst to force participation.
- **Social Media Training.** A comprehensive statewide social media strategy connected (#traveloregon) and we need training on how to leverage and use social media.
- **Open Hours.** Opening hours so that there are things for tourist to do... Closed on Sundays is not acceptable! When serving primarily local economies it can be hard to sustain long opening hours.
- **Way Finding.** Enhanced way finding is critical. Strengthen authentic points of interest in every community.
- **Data.** We all sit on a bunch of data... Is there a way to create synergy with these data and share it more effectively? Sharing data methodology with smaller and mid-sized groups is also critical.

TAKING ACTION/PRIORITIES. Just making the list would be huge. The stakeholders; the inventory; the people that we have who can say “yes”; our circles of influence and interaction.

- **Representation.** Be sure that every RDMO has representation from arts and culture on their board. Have a Chamber of Culture instead of a Chamber of Commerce. Arts and culture is not a separate thing; we want to weave it in to all of the other aspects of the industry.



Economic Development

Let's just come right out and say it; travel and tourism is a primary strategic resource for Oregon's near term and long term economic success. From the very beginning of the discussion it was clear that these professionals were dialed in and ready to offer substantial ideas and guidance to the statewide Action Plan.

The participants were clear that tourism should *always* have a seat at the table as Oregon considers its options for strong economic development in an uncertain future. Unlike many economic conversations, this one was optimistic, practical, future-focused, and inviting. It is about seeing the catalytic potential of a strong partnership between tourism and business to support agriculture, recreation, lodging, education, and employment. As one participant explained it, *"Many businesses that are nationally recognized in the state are also "authentic"—they are true representations of the spirit Oregon has to offer (Nike, Columbia, Keen – track, outdoors, recreation) and it's the same with food production. Our businesses underline every aspect of our climate and culture unique to the state."* This group was amazing at picking out specific examples (like the film industry in Oregon) and connecting its success to a larger narrative that would benefit the economy across the entire state.

This group was predictably very engaged with the power and potential of policy to shape a vibrant industry while ensuring protections and security for our natural and cultural resources. This group, more than most, saw the "big picture." They saw the profound interdependence of government, business, and institutional resources and the necessity to *"be on the same page with respect to priorities."*

FEEDBACK HIGHLIGHTS:

- **Way-Finding & Signage.** Actively help communities and leaders do a better job with making signage decisions. Share the good stories and examples to inspire more tourism focus.
- **Business Tours.** The tours that are happening are full – this is a need/desire that can benefit both tourism and economic development. Promote the businesses already doing it, as well as get more businesses to do it. Manufacturers need to be educated on the value of doing it – specifically for tourism and hospitality visitors (not just other business executives or board members) – open businesses up to the public.
- **Agriculture.** Connect with agricultural organizations to make them aware of the ag-tourism opportunities and the number of people that want to be engaged in that – understanding that being on a ranch or on a farm is something that appeals to people.
- **Foster Statewide Partnerships.** People are already doing work that is overlapping effort – can we work together to pick a few areas to focus on and leverage our work at an action level. The "tourist overlay" should drive more decisions on resources.
- **Case Study.** Show how a business can incorporate the Oregon brand into ongoing marketing. Develop a simple manual and later even a program to help businesses do it – small consulting contracts, etc. as the next step – example "grow Oregon" effort.
- **Tourism + Business Message.** Tourism promotion across the state should include economic development messages too – marry the two more often – the "made in" stamp – bring your business.
- **Shared Resources.** Cooperative "back room operations" – web presence, calendaring, insurance, legal needs, etc. These are a huge burden for small businesses and we could make that easier.
- **Oregon Film Industry.** There are scouts coming here who are totally unaware of the diversity of locations outside the Portland area – we can promote diversity of the state and ease of access.
- **Land Use.** Fees, usage, regulations, monitoring, and advocacy.
- **Two Oregons.** There is the "cowboy" and the "urban hipster" image of Oregon. We need to market this reality as a strength not a weakness.



It is no surprise that people who make their living in restaurants and lodging are dialed into the economic power of travel and tourism. What was surprising was how open and engaged the group was as they saw their own wants and needs in the light of the larger statewide industry agenda. *“We see this as a ‘whole state, all year’ issue.” “It is not a Portland thing or a Salem thing—or a summer thing or a winter thing.”* Representatives from around the state offered ideas and opinions about where Oregon can make a few changes—that will yield the biggest potential results.

This group offered deeply considered and reasoned opinions about how to leverage the existing destination management organization infrastructure—along with enhanced alliances with regional business and educational resources to “activate” Oregon’s statewide tourism potential. This group was also unique in their understanding of which efforts in the past have worked and which have not.

“It is all about marketing and it is not about marketing at all. Marketing is just a part of the equation.”

“We can do so much more with our marketing if we can really create alignment and everyone becomes a marketer.”

Sound crazy? Nope. This group offered example after example of partnerships with urban events, cultural events, athletic events, natural and historic venues, and educational resources resulting in a better Oregon Experience.

“We are the entrepreneurs, we are on the front lines. This is what we do.”

FEEDBACK HIGHLIGHTS:

- **Mobile Strategy.** Everything is mobile now, especially once the visitor is here – they are using their phone to decide where to go, what route to take, where and what to eat, best places to stop for attractions, ticket purchases, etc. It’s all about getting to them on that mobile device.
- **Land Use.** Significant heavy lifting needed in this area.
- **Ease of Doing Business/Business Consulting.** Make it easy for people who are thinking of doing business here to connect and move here. Consulting and technical assistance.
- **Data on Businesses Locating in Oregon.** It would be nice to have a way to track businesses that come to Oregon –what brought them here?
- **Education.** Continued education on how important tourism is to the state is critical. It may seem simplistic, but it is crucial to help state leaders and business leaders see the value of tourism.
- **Development.** We are good at promoting to attract new tourism businesses – but many businesses are “on their own” when it comes to fulfilling the promise of the Oregon Experience.
- **Talent.** Good employees are hard to come by. We need more talent in the tourism and services industry across the state to consistently deliver quality experiences for visitors.
- **Infrastructure.** Locations, facilities, etc. for new businesses to enter the market and no funding to improve the downtowns of small communities. We need to rehab buildings, fill vacant storefronts, etc.
- **Hospitality/Lodging.** Our hospitality/lodging & services industry is a key economic driver for many of our communities – more education/consulting needed to improve consistency and quality. Front line people need to be able to tell the tourism story – everyone should be able to promote Oregon.
- **Transportation.** As it relates to rural travel and getting people around the state. Also interests of freight vs. community beauty and appeal can be an issue.
- **Air Service.** Air service is key for international tourism. We need more air service to the state in general – international service to Portland, but also services to other areas.
- **Highlighting Emerging Industries.** If we don’t capture emerging industry opportunities and entrepreneurs, we lose the key awareness. Tourists could be interested as well.



These are people who think about, plan, and problem-solve to make The Oregon Experience real every single day. *“We wear a lot of hats.”* Destination Management Organizations (DMOs) are constantly working to make tourism *work* in Oregon.

There is an ongoing conversation about “two Oregons.” There is the hipster, future-ready, trendy, urban Oregon—and there is the adventurous, outdoor, rugged, cowboy Oregon. What works in one part of the state may not work in another. What works for one demographic won’t work for another. *“We are the glue that makes things come together, makes things better, and makes things happen.”*

When we talk about a statewide action plan, it is a plan that will affect these people directly. The role of the DMOs and the Consortium are central to the success of this effort—and the potential of the industry as a whole. That said, this group was very clear that they know their success depends on working well with each other and industry partners.

FEEDBACK HIGHLIGHTS:

- **Data.** We have a great deal of data that is available, but it is the analysis that is needed to mold it to each industry group and each specific message for better use/promotion across the industry.
- **Industry Facilitated Conversations.** We need to continue the conversation for how best to deliver the Oregon Experience.
- **Online Forum.** Online forum where people can talk about the plan and act on initiatives as it evolves – a place where people in the industry can collaborate and keep momentum going for action.
- **Winter Tourism.** We need to promote that there is a lot to do in the winter, and that the weather is not just rain. Much more!
- **International Focus.** We need to explain the importance of international tourism for industry influence and success.
- **Industry Influence.** We need to change how we view ourselves – we need to see ourselves as a legitimate and strong player at the economic development table for the state. Claim our role and don’t wait to be invited.
- **Welcome Centers/Rest Area/Visitor Centers.** Everyone agrees this is an issue but no one knows how to solve it. So many interests and planning constraints are involved. Hard to solve.
- **Messaging/Story. Template for narrative.** Smaller providers need more support in how to use data, research, and marketing from Travel Oregon – skill sets vary, so any assistance is valuable.
- **Product Branding.** We need to elevate the “made in Oregon” element of all the products we produce in this state. A shared logo on every product, on websites, in all marketing.
- **Recruiting/Jobs.** We need to recruit and attract talented, skilled people to the industry to provide the customer service we need.
- **Funding.** Stable and equitable!

Industry Opportunities

The realm of opportunities for the tourism industry in Oregon is as diverse as the players in the industry. Here are just a few highlights of the wealth of opportunities available for pursuing with a well-articulated action plan:

- Wine Tourism
- Product Recognition
- Authenticity
- Agricultural Tourism
- Professionalism
- Alignment
- Cross-Industry Conversations
- International Market
- Next Generation
- General Campaign
- Participation
- Partnerships
- Border States
- Airport Service
- Education
- Mobile/Social
- Walking Paths
- Urban Centers
- Craftsmanship
- Arts & Culture
- Food & Spirits
- Music
- Sports
- Beer-Making
- Cheese-Making
- Agritourism
- Rural Oregon
- Film Industry
- Welcome Centers
- UO/OSU

Conclusions

Industry Perceptions

In social psychology, self-awareness is a precursor to intentionality, reasoning, and problem solving. The same is true for institutional economic drivers like education, health care, agriculture, and travel and tourism. To the degree that an industry can see itself as an entity, dependent on a wide array of professionals, businesses, marketers, and service providers, it can then begin to make deliberative and galvanizing moves for the benefit of all. A central theme in this initial statewide Action Plan is a call out to everyone in Oregon to consider how their professional and social role connects to creating a great experience for visitors. To what degree are we all ambassadors to the state? Does a professional at Oregon Department of Transportation see herself as a part of Oregon's tourism industry? How about a cab driver in Portland or a fish and wildlife biologist on the coast?

Certainly there are roles that are in closer orbit to the experience of visitors. There are thousands of people who can unequivocally connect their livelihoods to the success of Oregon's travel and tourism industry. But the bigger point here is for the entire state to acknowledge the powerful economic forces in play within the industry. Can we all see the connection between a vibrant travel and tourism economy and the ability to safeguard precious natural resources? Can we all see a continuum of entry level jobs, career employment, entrepreneurs and aspirational professions? Can we make our resources attractive and accessible—and perhaps enhance them at the same time?

Managing Tension Points In The Industry

It became clear in the focus group conversations that in order for Oregon to achieve this grand vision, some fundamental tension points within the industry and the state will need to be carefully managed. Three major tension points emerged in the course of writing this Action Plan:

1. Coming to terms with capacity and the limits of growth
2. Celebrating local distinctiveness while delivering a unified “Oregon Experience”
3. Utilizing data and developing measures planned, unified, and effective industry action

These topics are substantial and complex. There is no expectation that any single effort will resolve these tension points. Instead, there is the belief that we can make ongoing incremental improvements in the way we plan, apply resources, measure impact and effectiveness, and act as stewards to the experiences that attract our state's visitors.

1. Coming to Terms with Capacity and the Limits of Growth

The word “balance” shows up a lot in what people say they want for Oregon's future. For this reason, any action we take as part of this plan must address the following questions:

- **Balance.** How do we develop plans to optimize balance across the calendar and across the state's geographical regions? This shows up as “shoulder season” variances in seasonal attractions; too many visitors to areas in peak times; and the lack of product development in rural and remote communities.
- **Transportation.** How do we develop a transportation infrastructure within the state that makes it easier for people to experience more within a single trip? How can we add overnight stays to visitors coming for a convention or a sporting event? What more can we do to encourage intrastate air transportation—as well as high speed rail?
- **Event & Conference Venues:** How do we fund and develop large event and conference venues that can make Oregon a competitor for national and international gatherings?
- **Land Use.** How do we optimize land use regulations to allow for true agritourism experiences? How do we make it viable for hoteliers and restaurateurs to develop resources to profitably support more access to agribusiness?

2. Celebrating “Local” while Delivering a Unified Oregon Experience

A major theme in all the discussion sections centered on the idea of “authenticity.” Visitors adore the quirky, unpretentious, sometimes slap-dash nature of the Oregon Experience. It is not just about tasting wine, it is about tasting wine with the people who made the wine and so on.

Travel Oregon continues to do an outstanding job creating a strong and coherent brand for Oregon and developing scalable marketing tactics that invite and celebrate local contributions while reinforcing a single narrative. The “Seven Wonders” campaign is a perfect example of an effort to strike a balance and offer all of Oregon to visitors. Local and regional DMO’s, similarly, work hard to deploy impactful marketing campaigns for their areas. Taking action to build the necessary foundations and infrastructure to deliver on the experience of these state wonders requires asking ourselves:

- **Regional Collaboration.** How do we continue to engage and optimize the RDMO network as a connective and balancing resource for local communities throughout the state? How do we ensure that these regions are dialed into Oregon’s statewide campaigns and international marketing efforts? How do we develop and deploy product development and effective local marketing resources?
- **Education & Advocacy.** How do we educate and engage local political leaders to understand and enable visitor-friendly resources in their communities? How do we break out of the “zero sum” thinking that means that funding one thing means not funding something else?
- **Visitor Safety.** How do we develop infrastructure and policies to ensure visitor comfort and safety? How do we manage the challenge of Oregon’s homeless population and the threat that transients pose to the feeling of security demanded by visitors?
- **Crowd Management.** How do we manage the practicalities of large groups convening in locations for brief periods of time? Whether it is available parking in downtown Ashland or a major sporting event in Portland or Eugene, how do we make sure the visitor has an outstanding experience and that local merchants benefit as much as possible?
- **Mobile Tools.** How do we create a web enabled, mobile ready infrastructure to empower visitors to explore Oregon with the confidence of an Oregon native? How do we gather, curate, and disseminate the information in a way that is reliable, accurate, timely, and friendly?

3. Utilizing Data and Developing Measures for Industry Action

A major outcome of the feedback gathering process thus far has been the almost universal agreement in the value of data to define and build strong positive perceptions of the industry. For the past ten years the travel and tourism industry has done an outstanding job of gathering, curating, publishing and educating with regards economic impact measures, travel statistics and demographics. We have learned that there is a lot we can measure and a lot we can know—and that this knowledge is powerful.

A major goal for this plan is to set the stage for ongoing two-year strategic planning and action cycles for the industry. At the heart of the goal is the desire to develop a robust, transparent, compelling approach that encourages maximum participation for anyone who wants to weigh in and voice an idea or opinion. At the same time, we want the process to be manageable, affordable, practical, and measurable. Happily, technology can enable many of these values. But we also know that real action requires levels of buy-in and leadership that only come when people work together—shoulder to shoulder—to get things done. Together we will need to answer questions like:

- **Dashboard.** What would a comprehensive travel and tourism industry “dashboard” look like? What measures would be offered? What kinds of goals will they imply?
- **Optimization.** Is there a way to optimize the effectiveness of ongoing and one-off research efforts? Can we imagine an industry accessible data warehouse? What other ongoing research should we invest in? Are there ways to gather and repurpose data from other state, local, and federal agencies? How can we partner with others industries (airlines, chambers of commerce etc.) to leverage their research and strategic priorities?
- **Garnering Resources for Action.** How do we attract and empower resources to “get things done” that are identified as goals within the plan? How are resources managed for these efforts? How are the projects managed?
- **Accountability.** How does the industry monitor the activities and progress of volunteers that contribute time and resources to the identified priority actions?

Part 3: 2-Year Industry Action Plan

Action Already Underway

There are good examples of how fostering connections and collaboration can galvanize efforts around a common cause across the industry. These groups have been able to engage in thinking together about the future and to establish firm alignment around action items. They offer inspiration for what this plan can accomplish if it works.

Oregon Agritourism Working Group March-June 2014

This year, a working group of stakeholders in the Agritourism industry came together to brainstorm areas of commonality and potential alliance.

The outcome is a five-year plan with a variety of action items:

- Create a database of proponents/ stakeholders
- Prioritize and draft legislative concepts to be advanced by diverse agritourism proponents
- Increase knowledge among community leaders and elected officials about opportunities and specific barriers to agritourism in their regions
- Identify/engage key commissions, guilds, associations
- Develop a sustainable funding strategy
- If feasible, develop a uniquely Oregon definition/brand of agricultural tourism that reflects diversity of products and experiences
- Coordinate with existing youth/farm education programs, including through OSU-4H and ODA, to integrate agricultural education in schools
- Develop sustainable funding strategy
- Develop local strategies for increasing agritourism in partnership with existing agritourism businesses
- Document lessons for other communities
- Develop support materials for new communities e.g. Farmer/rancher guide to agritourism

Cycling

People in the industry have been engaged in an organized effort around cycling for a decade now. And while it took significant time and dedication, real action has been realized. Recently, an industry working group successfully rallied resources and commitment across the industry to complete the following action items:

1. Complete Historic Columbia River Hwy Trail
2. Initiate planning for an Oregon Coast Pathway
3. Improve Oregon Transportation Connections for Bicyclists
4. Develop Network of Gravel Road Trails for Biking
5. Develop more Recreations and Family-Friendly Riding Opportunities in Oregon

To learn more about this inspiring industry effort, including detailed meeting notes and the five strategies, visit the following link: <http://industry.traveloregon.com/industry-resources/product-development/bicycle-tourism-development/oregon-bicycle-tourism-partnership/>

2-Year Priorities

It would be overwhelming to include all of the feedback gathered for this Action Plan over the course of 2014. The dedicated and passionate people that turn the wheels of the tourism industry in Oregon are overflowing with ideas for how to make things better. The challenge is not in finding the great ideas, but in finding ways to bring those ideas to life.

While we can't do everything in the next two years, some priorities rose to the top of every conversation in 2014:

- Facilitate Cross-Industry Conversations
- Introduce an Online Interactive Forum
- Increase Participation/Collaboration
- Neighboring State Partnerships
- Generate Messaging For Each Group

For this first 2-Year Action Plan, we recommend choosing five core areas where a focused effort will make a big difference and serve to lay the foundation for future action efforts to come. This Action Plan is about supporting the change and forward-movement that is already in progress, building the necessary infrastructure, and fostering the critical collaboration that will build the platform we need to succeed now and in the future.

What We Know For Sure

Without exception, every industry conversation touched at some point on three critical needs:

1. Product
2. Capacity
3. A Convener

The nature of the “solutions” for each of these areas differed across guilds, regions and people, but everyone agreed that foundational work in each is *essential* in order to realize the vision of Oregon as the #1 outdoor recreation destination in the country. This Action Plan is a response to these known industry needs and designed to build the necessary foundation and infrastructure to drive future action efforts.

LEADERSHIP. In general action projects will be chartered and supported under the leadership of the Tourism & Hospitality Industry Consortium.



2014-16 Action Items:

I. CROSS-INDUSTRY FACILITATED COLLABORATION

1. Facilitated Sessions Resourced:
 - Continue conversations with additional key industry groups
2. Marketing & Communication Alignment
 - **Interactive Online Forum + Social Media Action Plan Support:** Professionally produced “hub” for ongoing collaboration, relevant regular reporting, partner communication, and methodology for driving the Action Plan. Participants will be able to comment, give & receive feedback, sign up to work on things, and more.
 - **Annual Calendar:** For cross-industry collaboration & promotion (strong social media component). (not events/consumer information)

II. EDUCATION AND MESSAGING

1. Higher Education/Industry Training:
 - Stop the brain drain - partner with providers to ensure we are producing a “next generation” of industry talent.
2. Industry Jobs & Talent Recruitment:
 - Design initiative for attracting talented, skilled people for industry jobs and careers.
3. Media Training:
 - Practical use of social tools (Instagram, etc.) for better education and messaging delivery efforts across the industry.
4. Localization of Content & Data
 - Generating/collecting content & assist in telling local stories/branded messaging
 - Create templates for stories, messaging, content collection and marketing efforts

III. TOOLS

1. Data:
 - Inventory existing data/research from all industries and make available
 - Identify relevant future needs
 - Prioritize for funding
 - Results need to be scalable, sharable and actionable.
2. Dashboard:
 - Create a data dashboard for visitor data specific to industry partner specialty areas (wine, cycling, recreation, etc.) as well as regional data.

IV. FUNDING

1. Dedicated Funding:
 - Geographical/Industry equity
 - Acknowledge and work to resolve urban/rural challenges
 - Target industry segment funding needs (Arts, Craft Beverages, Agri-tourism, etc.)
2. Human Capacity:
 - Funding dedicated to increase human resources and capacity in industry and geographical areas of most need.
3. Outside Funding:
 - Identify outside sources and help partners align for success
 - Sources (grants, etc.) – aligned and mapped to needs

V. POLICY & INFRASTRUCTURE NEEDS

1. Transportation:
 - Way-finding – branded and aligned; all segments seek assistance
 - Funding – identify and prioritize opportunities
 - Safety
2. Statewide Technical Delivery Capacity:
 - Improve statewide digital accessibility for consumers
 - Create statewide partner digital platform for delivery
3. Land Use:
 - New thinking on allowed uses with practical regulation
 - Enable access to financing and insurance
 - Consistent local regulations and model county code
4. Outdoor Recreation
 - Create comprehensive outdoor recreation plan for Oregon



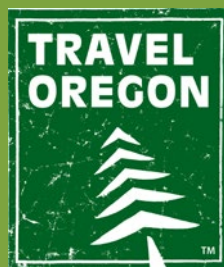
Action Plan Outcomes

These five areas of action are ambitious to be sure. And each contribution—from awareness, to ambassadorship to actual leadership—will make a difference as we all work together to build these foundational areas of infrastructure and development. These actions will pave the way for future action efforts designed to realize our long term vision for Oregon’s travel and tourism industry.

As this Action Plan takes hold we would expect:

- Travel and tourism data will be an expected part of economic development discussions statewide.
- People will acknowledge the profound advantages that are at hand if Oregon is able to continue to develop its world class Oregon Experience.
- People will be able to call out the specific economic, environmental, and cultural performance indicators that flow from a successful travel and tourism model.
- We will recognize the incredible value of investments made in our tourism infrastructure.
- City and state politicians will seek the council of industry professionals and will work to bolster the resources and relationships that attract visitors and create jobs.

With these actions, we can envision a future where every person living and working in Oregon can see how they impact and contribute to our thriving tourism industry. By securing this necessary foundation, we guarantee that Oregon will continue to be recognized as a state that is building an exceptional tourism industry while maintaining a high level of professionalism and environmental stewardship to protect our beautiful state long into the future.



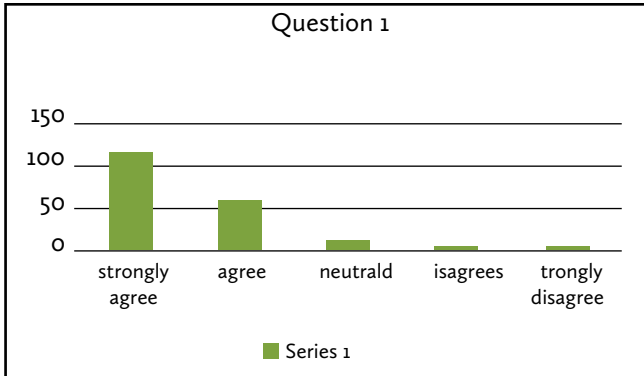
Appendix

Governor's Conference

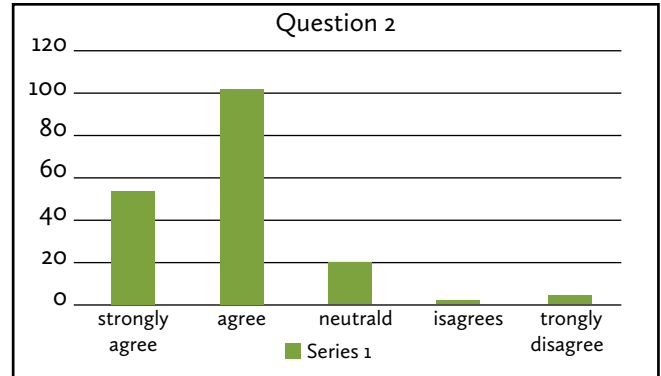
Live Poll Results

Close to 200 industry leaders participated and offered the following input.

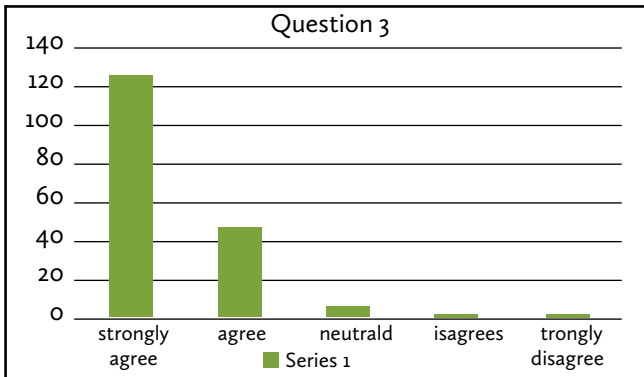
The Oregon Experience from a consumer's perspective (dreaming/planning/visiting/sharing) is changing quickly as the way they make travel choices evolve.



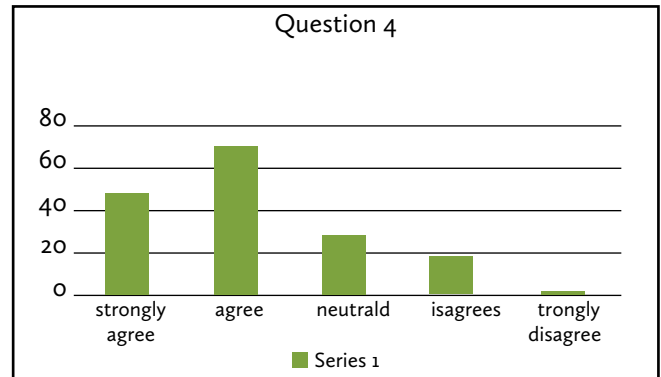
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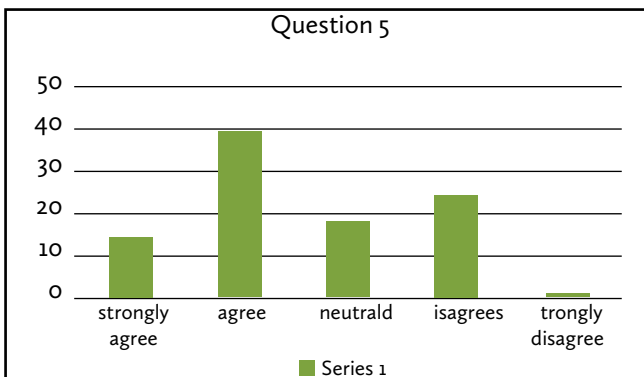
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