

INSPIRE ACTIVE ADVENTURERS

OREGON TOURISM COMMISSION

YEAR IN REVIEW FY 2018-2019



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.

ABOUT THIS REVIEW

ORS 284.148 requires the OTC to submit an annual report due each October 1 to the Legislative Fiscal Officer (LFO) that identifies sources and uses of funds. This year in review is not the LFO report identified in statute, but instead provides an overview of agency programming, metrics on return on investment, geographic equity and community support.

OTHER REPORTS

In addition to this review, Travel Oregon produces or contributes to the following required and as requested reports:

- Comprehensive Annual Financial Report (CAFR), annually
- Audit/Financial Review, biennially
- Strategic Plan & Budget, biennially
industry.traveloregon.com/strategicplans
- OTC reports, quarterly
industry.traveloregon.com/commissionmeetings
- Wine Country License Plate program executive summary, annually
- Legislative Fiscal Office reports
- Legislative Revenue Office reports
- Legislative committees reports





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*Cover & back cover: Creative from 2019 Only Slightly
Exaggerated marketing campaign*

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*





MESSAGE FROM THE CEO



In 2003, the Oregon tourism industry, the governor, legislators, private business owners and trade associations were certain that Oregon was so special that people from all over the world would treasure their time spent here, whether they traveled solo or with friends and family. They were certain the

positive economic and social value of tourism would be undeniable. They were certain it was time to recognize that tourism jobs are good jobs and that tourism could be harnessed to help Oregon's struggling economy. So, together, they passed the Oregon Tourism Investment Proposal — HB 2267.

Collectively, as a statewide tourism industry we have successfully grown Oregon's share of an expanding global tourism industry. According to the 2017 Tourism Advertising Evaluation and Image Study by Longwoods International, every dollar Travel Oregon spends on domestic advertising generates \$157 in new visitor spending and \$8 in state and local taxes. Relatedly, when the Oregon Tourism Investment Proposal went into full effect in 2005, Oregon's share of visitor spending was 0.97%. By 2017 (the most recent numbers available), our share had grown to 1.19%. And lest you wonder if 0.22% is significant, every 0.1% of share is equivalent to shifting over \$1 billion from other destinations to Oregon. So, the 0.22% is equal to a \$2.3 billion shift in Oregon's share of visitor spending.

Since 2003:

- Visitor spending is up 89% (from \$6.5 billion to \$12.3 billion).
- Direct employment is up 37% (from 84,500 jobs to 115,400).
- Employee earnings are up 111% (from \$1.7 billion to \$3.6 billion).
- Out-of-state and international visitors traveling throughout the state account for 76% of all overnight travel spending.
- State and local taxes generated by visitors are up 127% (from \$246 million to \$560 million).

We also know the industry needs broad and diverse roots to ensure stability and resilience. We need to continue concentrating on developing and protecting the places that attract visitors while giving our partners the tools they need to inspire these visitors to choose their destination. We also recognize the power of marketing to educate our visitors on ways to visit more popular places in a sustainable way or travel to lesser-known areas, all to enhance the visitor experience and spread the economic impact that comes with visitation.

We are on a mission to share and protect Oregon. We love all the wonders of Oregon — from culinary delights in Portland to backcountry hut touring in the Wallowas to kayaking on the Willamette River — and that means we need to protect them and share their stories with the world, so others will love and protect them too.

Todd Davidson

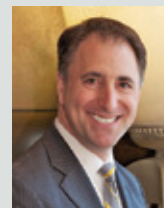
Todd Davidson
CEO

OREGON TOURISM COMMISSION



Governor
Kate Brown

Nine governor-appointed members oversee the Oregon Tourism Commission. Three commissioners represent the tourism industry-at-large, five represent the lodging sector and one represents the public-at-large. Commissioners approve and oversee the budget and strategic plan that directs the actions of the staff.



Chair
Scott Youngblood



Vice Chair
Nigel Francisco



Don
Anway



Richard
Boyles



Lucinda
DiNovo



Maria
Ponzi



Mia
Sheppard



Kenji
Sugahara



Greg
Willitts

FINANCIAL SUMMARY

TAX OVERVIEW

In 2016, the Oregon legislature passed HB 4146 increasing the Oregon Tourism Investment Proposal of 2003 (HB 2267) from a 1% statewide lodging to tax to 1.8% effective July 1, 2016 and decreasing to 1.5% July 2020. State law currently mandates 30% of the statewide lodging tax received by Travel Oregon be used to implement two distinct programs in support of Oregon's seven tourism regions and local communities:

- 10% of statewide lodging tax funds are directed to the Competitive Grants Program.
- 20% of statewide lodging tax funds are directed to the Regional Cooperative Tourism Program.

FY 2018-19 PROGRAM FUNDING & EXPENDITURES

July 1, 2018 - June 30, 2019

SOURCES

Statewide Lodging Tax Revenue	\$40,579,697
Other	\$528,832
TOTAL	\$41,108,529

USES

Global Marketing	\$13,225,618
Global Strategic Partnerships	\$1,955,781
Regional Cooperative Tourism Program*	\$7,627,374
Competitive Grants Program*	\$6,013,775
Global Sales	\$3,265,888
Destination Development	\$1,881,428
Administration & Operations	\$3,894,300
TOTAL	\$37,864,164

*Uses include administrative expenditures for program implementation. Grant disbursements include awards from prior years.

WINE COUNTRY LICENSE PLATE PROGRAM

In 2011, the Oregon legislature passed SB 442 creating the Oregon Wine Country license plates, in turn initiating two programs for the tourism industry: a matching grant and regional tourism promotion program. Travel Oregon administers the programs ensuring 100% of these specialty plates' sales are used to help advance wine and culinary tourism promotions and initiatives.

July 1, 2018 - June 30, 2019

SOURCES

Wine Country License Plates Revenue	\$401,290
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USES

Regional Tourism Promotion	\$114,428
Grants	\$198,739
TOTAL	\$313,167

"Oregon is a special place, and our travel and tourism industry showcases the best beauty and wonder of our state, while also growing and strengthening our economy. Travel-related spending, jobs and earnings are vital components to our state's healthy economy. Oregonians share a love for the outdoors, and being able to explore and connect with everything our state offers supports the health and well-being of our people."

- Governor Kate Brown

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%▲)

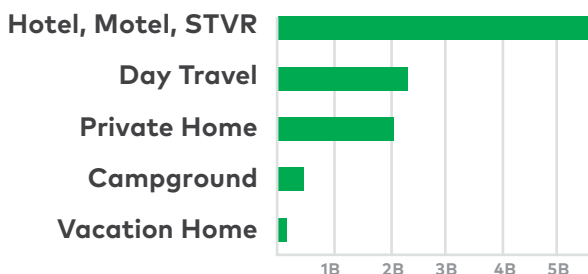
Source: Dean Runyan Associates

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

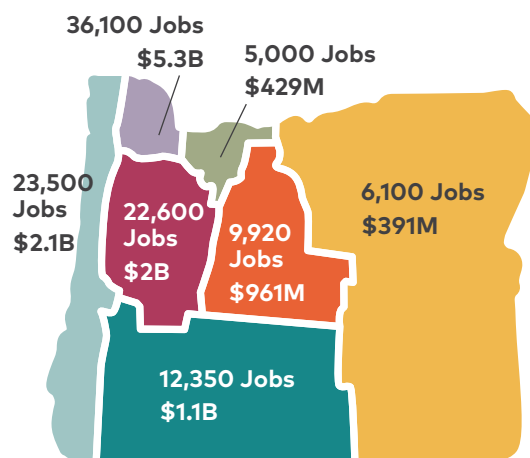
VISITOR SPENDING BY TYPE OF LODGING



	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



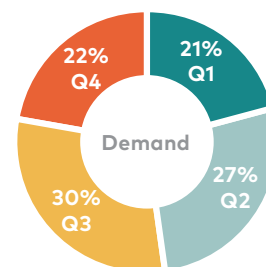
Source: Dean Runyan Associates

LODGING TRENDS (YOY)

Demand
15.9M (1.4%▲)

Revenue
\$1.96B (2.3%▲)

Occupancy
64.8% (-0.9%▼)

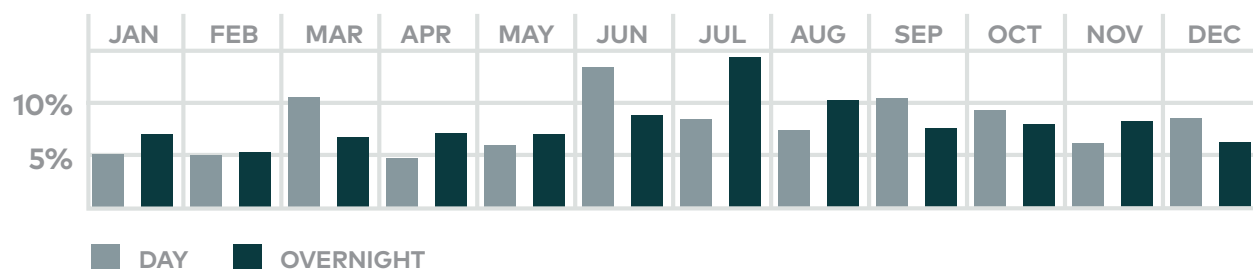


Source: STR, Inc.

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)

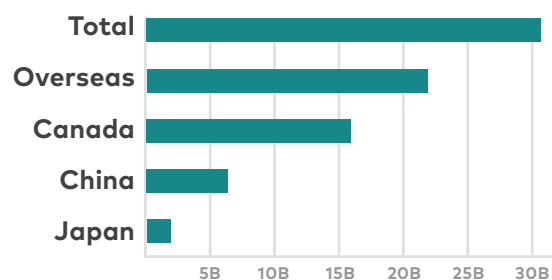
Los Angeles	569,006	(-2.1%▼)
SF Bay Area	560,256	(5.8%▲)
Denver	190,605	(7.1%▲)
Phoenix	168,193	(-1.4%▼)
Seattle	144,331	(9.1%▲)

OR Airports (YOY)

Oregon	4,227,222	(4.8%▲)
Portland	3,623,580	(3.8%▲)
Eugene	217,179	(7.5%▲)
Medford	202,609	(12.1%▲)
Bend	172,415	(14.9%▲)

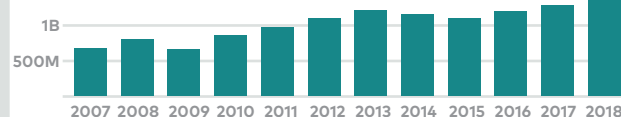
Source: U.S. Department of Transportation (O&D Survey, T100), Dean Runyan Associates

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

ADMINISTRATION & OPERATIONS

DIVERSITY, EQUITY & INCLUSION

Oregonians can be some of the friendliest folks and we want the world to know, feel and experience for themselves how welcoming Oregon is. We are also aware more can be done to ensure that all visitors feel welcome, safe and respected as they travel throughout our beautiful state. With that goal, Travel Oregon has produced our first-ever equity statement.

To further this work, Travel Oregon has:

- Executed staff trainings with the intention of reaching a shared understanding of equity issues.
- Crafted “Community Agreements” with all staff members, which are intended to help us invite one another into community and navigate conflict.
- Been intentional in the reflection of equity in our programs of work.

OFFICE LOCATIONS

PORTLAND OFFICE

51 staff members

Travel Oregon
319 SW Washington St., Suite 700
Portland, OR 97204

PDX AIRPORT OFFICE

3 staff members

Oregon Welcome Center at PDX
7000 NE Airport Way, Suite 2201
Portland, OR 97218

SALEM OFFICE

7 staff members

Travel Oregon
530 Center St., Suite 200
Salem, OR 97301

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.



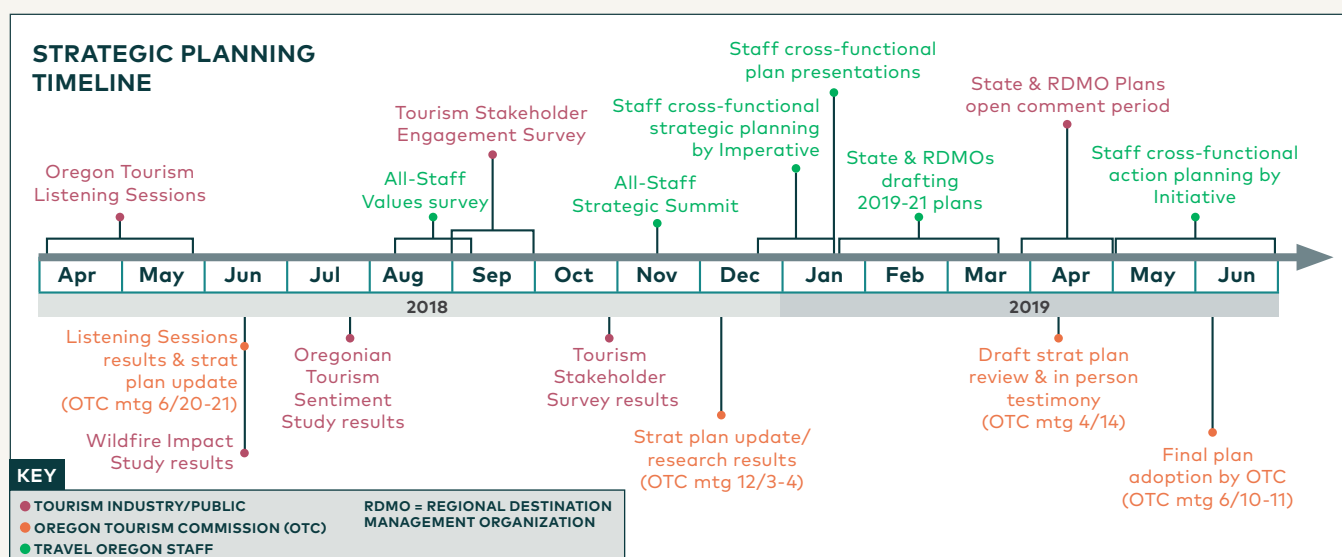
Travel Oregon staff at Salem Waterfront Park

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

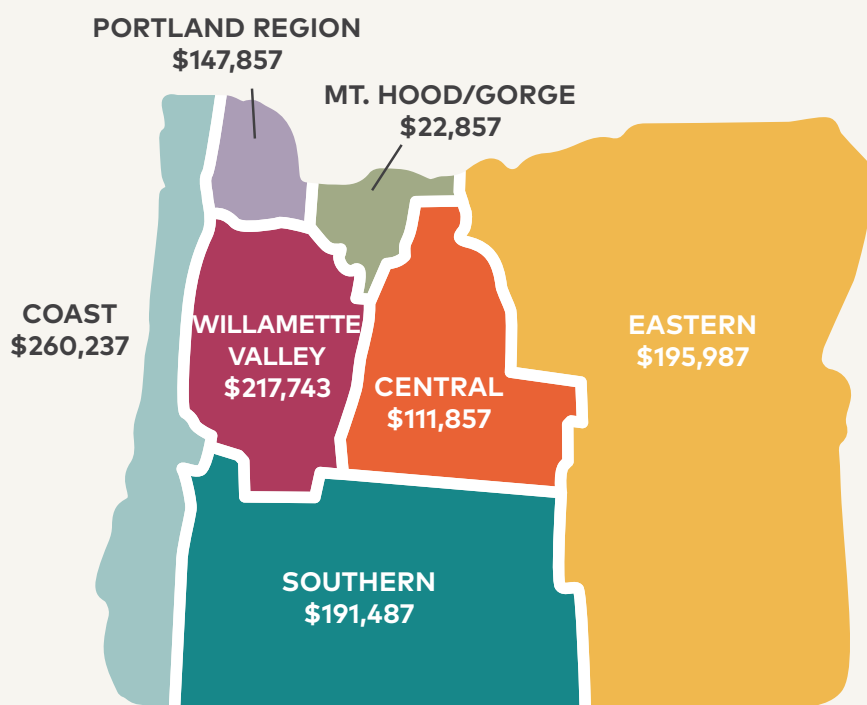


COMPETITIVE GRANTS PROGRAM

Per statute, Travel Oregon directs 10% of statewide lodging tax revenue to a competitive grants program. The program awards grants for projects that contribute to the development and improvement of communities throughout Oregon by means of the enhancement, expansion and/or promotion of the tourism industry.

In 2018, Travel Oregon awarded funding for both Competitive Small Grants and Competitive Medium Grants. The Competitive Small Grants program funds requests up to \$20,000 with a required 10 percent cash match. 2018-19 awarded projects ranged from \$2,880 to \$20,000. Even the smallest amount provides a big impact for Oregon communities. These projects are scheduled to be complete by November 15, 2019. Travel Oregon's Competitive Medium Grants program funds requests between \$20,000-\$100,000 with a required 25 percent cash match. 2018-20 awarded projects ranged from \$20,000 to \$100,000. These projects are scheduled to be complete by July 23, 2020.

SMALL & MEDIUM GRANTS AWARDED: \$1,148,025



"With the Travel Oregon phase 2 grant we have been able to realize the organizational structure that we developed through the assessment in phase 1."

\$100,000 award to Association of Oregon Counties

"The feasibility study funded by the grant could not have been undertaken without this assistance — and the knowledge gained has been critical for the planning and, ultimately, the execution of our capital campaign."

\$30,000 award to Cascades Raptor Center

"We have thoroughly enjoyed working with Travel Oregon's small grants program and appreciate the opportunity this program provides for regional projects to undertake new initiatives and expand their impact."

\$20,000 award to Eugene Civic Alliance

"The Travel Oregon grant definitely lent credibility to the Spence Mountain trail project and helped with other funding sources. Total investment to date from both public and private sources exceeds \$500,000. Thank you for the opportunity to grow more beautiful trails in Klamath County!"

\$20,000 award to Klamath Trails Alliance

COMPETITIVE SMALL GRANTS PROGRAM

- Up to \$20,000
- Number of projects funded: 23
- Grant dollars awarded by Travel Oregon: \$348,640
- Amount leveraged: \$2,427,996
- Community support letters: 93
- Projects scheduled to be complete by: Nov. 15, 2019

SMALL GRANTS AWARDED

ORGANIZATION NAME	PROJECT NAME	TOURISM REGION	\$ AWARDED
Baker County Tourism - Basecamp Baker	PinkBike.com Mountain Bike Feature Baker and Union counties	Eastern Oregon	\$13,150
Baker County Tourism - Basecamp Baker	Baker County Delegation Go West Summit	Eastern Oregon	\$10,780
Cape Blanco Heritage Society	Cape Blanco Lighthouse Model	Oregon Coast	\$13,500
City of Canby	Canby Tourism Plan	Willamette Valley	\$13,500
City of Cascade Locks	Cascade Locks Gorge Hubs Project	Mt. Hood/Gorge	\$20,000
City of Independence	Independence Downtown Wayfinding Project	Willamette Valley	\$20,000
Columbia River Maritime Museum	Columbia River Maritime Museum Interpretive Sign Panels	Oregon Coast	\$12,000
Cottage Theatre	ACT III Theatre Expansion	Willamette Valley	\$20,000
Eastern Oregon Regional Theatre Inc	Baker Orpheum Theatre Phase 4 Construction Documents	Eastern Oregon	\$20,000
Eugene Civic Alliance	Civic Park: Pre-Opening Strategic Services	Willamette Valley	\$20,000
Friends of Sumpter Valley Dredge	Enhancing the Visitor Experience at Sumpter Valley Dredge	Eastern Oregon	\$20,000
Klamath Trails Alliance	Spence Mountain Trail Development	Southern Oregon	\$20,000
Lake County Chamber of Commerce	Lake County Geological Features Mapping Project	Southern Oregon	\$8,630
Marshfield High School	Stranger, Stop and Cast an Eye @ the Marshfield Pioneer Cemetery	Oregon Coast	\$2,880
Neighborhood Economic Development Corporation	Oregon Farmers Market Brand Development and Market Directories	Statewide	\$20,000
Oregon Adaptive Sports	Inclusive Marketing Project	Central Oregon	\$9,000
Oregon Electric Railway Historical Society	Trolley barn upgrade	Willamette Valley	\$7,000
Oregon Electric Railway Historical Society	Restoration parts for interurban car # 1067	Willamette Valley	\$20,000
Port of St. Helens	Bayport RV & Marine Park Improvements	Portland Region	\$20,000
Sunset Empire Park & Recreation District	Beach Wheelchair Storage Locker Project	Oregon Coast	\$9,000
Tillamook Offroad Trail Alliance Pacific City Pathways (TORTA)	Pacific City Mountain Bike Trail Project	Oregon Coast	\$20,000
Umatilla County Historical Society	Heritage Station Museum LED Sign Project	Eastern Oregon	\$10,000
Wallowa Mountains Hells Canyon Trails Association	BC Creek Bridge	Eastern Oregon	\$19,200

PROJECT EXAMPLE

BEACH WHEELCHAIR STORAGE LOCKER \$9,000 GRANT

With this grant award, Sunset Empire Park & Recreation District was able to install three weatherproof lockers specifically designed to store beach wheelchairs — creating accessibility for visitors experiencing mobility challenges by providing them with a way to explore the beach.



COMPETITIVE MEDIUM GRANTS PROGRAM

- \$20,000-\$100,000
- Number of projects funded: 12
- Grant dollars awarded by Travel Oregon: \$799,385
- Amount leveraged: \$10,530,608
- Community support letters received: 74
- Project scheduled to be complete by: July 23, 2020

MEDIUM GRANTS AWARDED

ORGANIZATION NAME	PROJECT NAME	TOURISM REGION	\$ AWARDED
Association of Oregon Counties	Oregon Coast Trail - Phase II	Oregon Coast	\$100,000
Butte Creek Mill Foundation	Rebuild and Restoration of the Butte Creek Mill and Ice House	Southern Oregon	\$60,000
Cascades Raptor Center	Expansion Feasibility Study	Willamette Valley	\$30,000
City of Amity	Branding and Communications for Amity Area Tourism	Willamette Valley	\$20,000
City of St. Helens	St. Helens Wayfinding Signage Phase 1 Implementation	Portland Region	\$75,000
Coos County	Whiskey Run, Phase II	Oregon Coast	\$100,000
Friends of the Oregon Caves and Chateau	Plans to restore and retain the Historic Character of the Oregon Caves Chateau	Southern Oregon	\$100,000
Lane Council of Governments	Connecting Oregon's Scenic Bikeways to the World's Largest Bicycle Network: U.S. Bicycle Route System	Willamette Valley	\$34,385
Liberty Theatre Foundation Inc	Liberty Theatre Restoration Phase III	Eastern Oregon	\$100,000
Portland Parks Foundation	Footbridge Over Burnside	Portland Region	\$50,000
Salem's Riverfront Carousel	Salem's Riverfront Carousel - "The Stables:" Expanding Visitors Opportunities at the Carousel	Willamette Valley	\$30,000
Warm Springs Community Action Team	Warm Springs Reservation Old Commissary Renovation, Visitor Kiosk, and Marketing	Central Oregon	\$100,000

PROJECT EXAMPLE

BUTTE CREEK MILL & ICE HOUSE RESTORATION \$60,000 GRANT*

With this grant award, the Butte Creek Mill Foundation has been able to fund key aspects of the Butte Creek Mill restoration, so that it's fully operational, maintains its historic integrity and includes ADA accessibility and an interpretive center highlighting local history and Native American culture.

"The Butte Creek Mill Foundation is in the home stretch of fundraising with over \$2.1 million of our \$2.5 million budget to date! Travel Oregon was one of our first grant requests funded for our project — it set the tone for the past year in funding."

– Butte Creek Mill Foundation

**This project has been awarded a total of \$80,000 from Travel Oregon.*



BEFORE



AFTER



COMPETITIVE LARGE GRANTS PROGRAM

- Number of projects funded: 1
- Grant dollars awarded by Travel Oregon: \$10 million (\$2.5 million annually for four years)
- Amount leveraged: \$85 million
- Statewide support letters received: 11

In December 2017, Travel Oregon awarded the Eugene-based organization, Oregon21, a \$10 million grant for the 2021 World Athletics Championships to take place in Oregon on August 6-15, 2021. To date, Oregon21 has received half of the awarded grant for a total of \$5 million.

The World Athletics Championships is the crown jewel of track and field sports — a 10-day spectacle of awe-inspiring performances from the best athletes in the world. The World Athletics Championships Oregon21 will be the largest sporting event held in the world in 2021, and the largest sporting event our state has ever welcomed. Oregon will be the first state in the U.S. to host this event — showcasing Oregon on an international scale.

OREGON21'S FOUR KEY GOALS:

1. Engage communities throughout Oregon and the United States, innovate how the world experiences sport and be a global platform for advancing diverse programs that leave a lasting legacy.
2. Work with Travel Oregon to highlight the entire state of Oregon, encompassing all seven tourism regions, and create an event that is “Authentically Oregon.” Produce and deliver an experience that will create lasting memories for those who attend and spur a desire to visit in those watching from afar.
3. Benefit Oregon businesses by tapping into local resources and expertise at every level of event operations.
4. Offer opportunities to all regions of the state to host team training camps prior to the event.

Planning and committee work is underway to achieve the four key goals outlined above.

ESTIMATED IMPACT

A preliminary economic impact report conducted by ECONorthwest in 2015 estimated attendees will spend \$52 million directly at the event — and a total of \$138 million throughout the state. It's estimated more than 60% of event visitors will come from outside Oregon.

REGIONAL COOPERATIVE TOURISM PROGRAM

Oregon is divided into seven tourism regions: Oregon Coast, Portland, Mt. Hood/Gorge, Willamette Valley, Southern Oregon, Central Oregon and Eastern Oregon.

Per statute, Travel Oregon directs 20% of statewide lodging tax revenue to the Regional Cooperative Tourism Program (RCTP) – investing resources directly into each of the seven tourism regions on a pro rata basis.

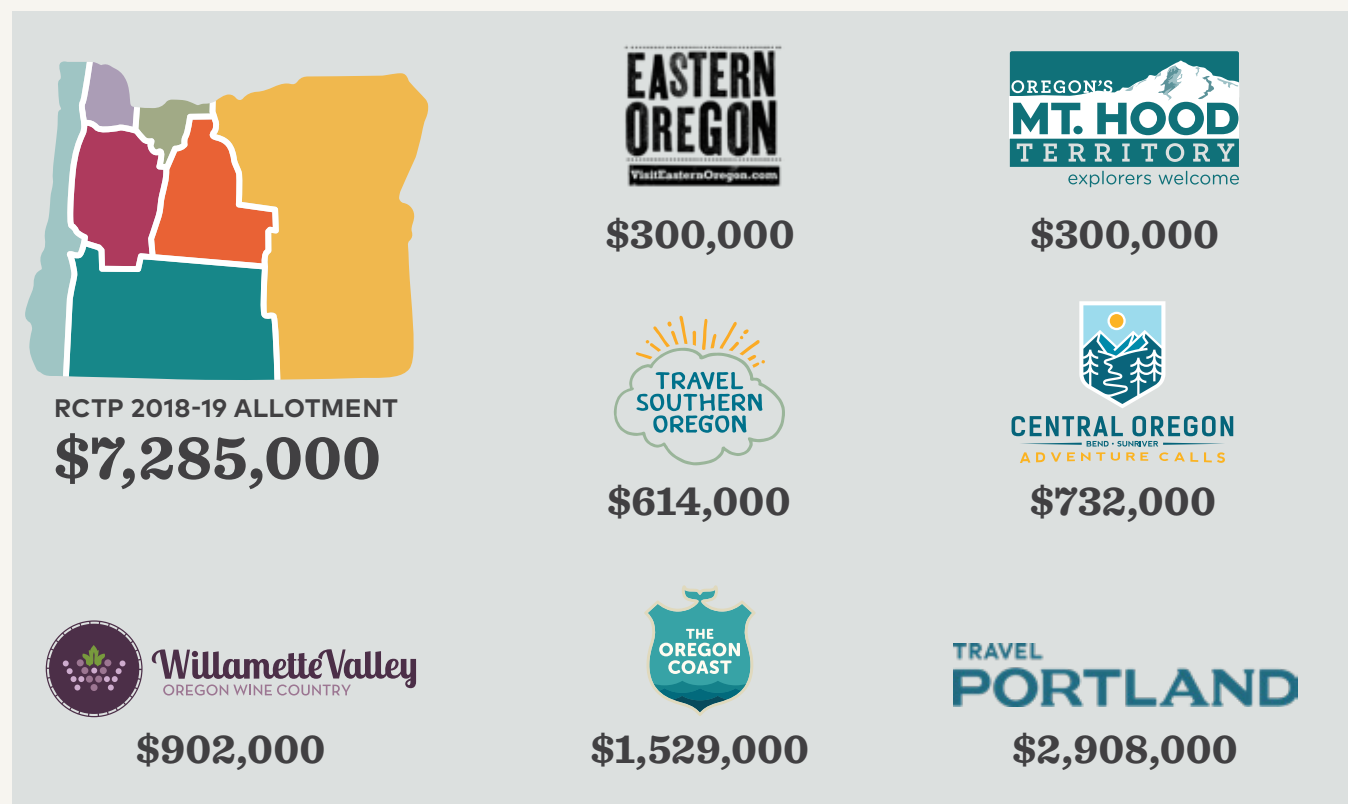
Through a competitive Request for Proposal (RFP) process, Regional Destination Management Organizations (RDMOs) are approved by the OTC. RDMOs are the regional representatives that are responsible for developing, submitting, and implementing regional plan proposals for use of state dollars. In 2018, the OTC approved each of the seven RDMO proposals, Travel Oregon executed contracts beginning July 1, 2019 with each RDMO to fulfill on the program guidelines, align with Travel Oregon and support their region in tourism marketing, sales and development.

The following several pages include one programmatic investment stemming from RCTP per region. All RCTP investments by region can be viewed at industry.traveloregon.com/RCTP.

“The Regional Cooperative Tourism Program has encouraged us as a region to align our strategic planning with Travel Oregon’s planning. As a rural region that allows us to leverage our industry investments in ways that have much more impact than if we were lifting alone.”

- Bob Hackett

Associate Director,
Travel Southern Oregon





EASTERN OREGON

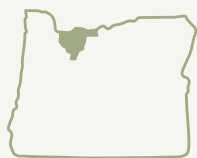
RCTP allotment: \$300,000

REGIONAL INVESTMENT SPOTLIGHT

175TH ANNIVERSARY OF THE OREGON TRAIL \$7,500 INVESTMENT

In response to stakeholder feedback and presented with an incredible opportunity to showcase the region's rich culture and heritage, Eastern Oregon Visitors Association invested RCTP funds to develop and promote the 175th anniversary of the Oregon Trail.

Aligning key partners, creating beautiful promotional materials and marketing the 175th anniversary, Eastern Oregon saw more visitors engage with heritage sites along the Oregon Trail — the National Historic Oregon Trail Interpretive Center in particular. The region saw an increase in visitor spending and overnight bookings throughout all four sub-regions of Eastern Oregon. The opportunity also helped reinvigorate the Oregon Trails Marketing Coalition to come together, continue to meet and capitalize on future marketing opportunities.



MT. HOOD & COLUMBIA RIVER GORGE

RCTP allotment: \$300,000

REGIONAL INVESTMENT SPOTLIGHT

TRAILHEAD AMBASSADORS \$19,384 INVESTMENT

Every year, millions of visitors head to the Mt. Hood/Gorge region to experience the jaw-dropping views and satisfy their outdoor adventure cravings. With the increase in visitation to the region's hiking trails, there's also been an uptick in hikers not being as prepared or well-versed in trail etiquette as they could be. In 2018, using RCTP dollars, Oregon's Mt. Hood Territory launched the Trailhead Ambassador volunteer program to:

- Reduce trailhead and trail congestion.
- Improve safety and security on the regions' busiest trails.
- Promote responsible hiker ethics such as "Leave No Trace" and *Ready, Set, Gorge!*
- Encourage visitors to spread their economic impact throughout the region.
- Support land managers with regular trail feedback.

In the first year, the results exceeded expectations with 94 trained volunteers donating nearly 1,900 hours over 20 weekends to improve the experience for more than 23,700 visitors at 10 of the region's most popular trailheads.





SOUTHERN OREGON

RCTP allotment: \$614,000

REGIONAL INVESTMENT SPOTLIGHT

ROGUE VALLEY WINE COUNTRY SUPPORT

\$14,000 INVESTMENT

Struggling to gain traction with unified marketing and communications, the Rogue Valley's wine country was not fully capitalizing on its amazing potential as a wine and agritourism destination. To better support the area's wineries, restaurants, lodging properties and destination marketing organizations, Travel Southern Oregon, utilizing RCTP funds, invested directly in capacity-building, grant-writing assistance and strategic planning to bring the various players together to form the Rogue Valley Vintners (RVV).

Served by a 16-member board, the RVV now serves as the Rogue Valley wine country's regional marketing and communications entity. Providing effective, cohesive branding, marketing, media and destination development partnership opportunities, RVV is helping to make the Rogue Valley a world-class wine destination.



CENTRAL OREGON

RCTP allotment: \$732,000

REGIONAL INVESTMENT SPOTLIGHT

COMMERCIAL AIR SERVICE DEVELOPMENT & MARKETING FUND

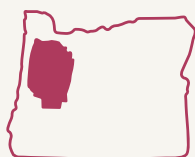
\$50,000 INVESTMENT

With 78% of Central Oregon stakeholders identifying air service retention and development essential to tourism in the region, Central Oregon Visitors Association invested RCTP dollars in the Commercial Air Service Development and Marketing Fund. The fund not only ensures existing flight frequency and air carrier commitment at the Redmond Airport (RDM), but also grew non-stop air service routes by 5%.

Funding the required seat Revenue Guarantee mandated by United Airlines and Sun Country Airlines, RDM now boasts non-stop daily commercial air service to and from Chicago, Las Vegas and Los Angeles, a third flight to Denver, and an additional flight on summer Saturdays from San Francisco. Additionally, Allegiant Air announced their return to RDM with year-round, twice-weekly flights to both Las Vegas and Phoenix beginning this fall.



TOP PHOTO: LAURA ARBO



WILLAMETTE VALLEY

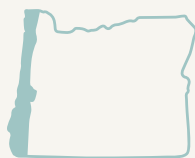
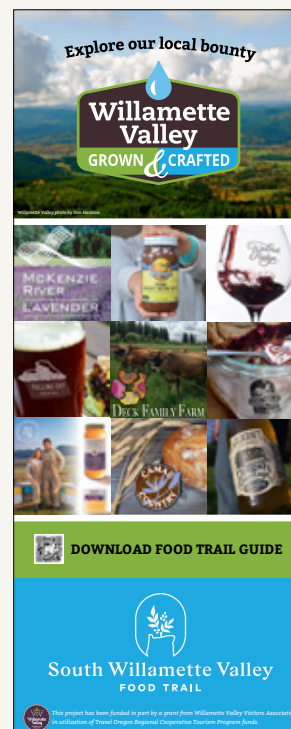
RCTP allotment: \$902,000

REGIONAL INVESTMENT SPOTLIGHT COMPETITIVE GRANT PROGRAM

\$159,495 INVESTMENT

To better support regional tourism marketing initiatives and stakeholder concerns around tourism seasonality fluctuations and workforce development, the Willamette Valley Visitors Association established a competitive grant program with RCTP funds.

Investing in local governments and non-profits such as Albany Park and Recreation, City of Willamina, McKenzie Community Development and the Willamette Valley Sustainable Foods Alliance, the grant program has been able to fund destination development, marketing efforts, way-finding signage and website optimization projects, to name a few.



OREGON COAST

RCTP allotment: \$1,529,000

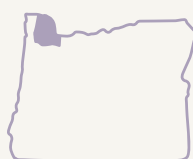
REGIONAL INVESTMENT SPOTLIGHT OREGON COAST TRAIL

\$89,885 INVESTMENT

The nearly 400-mile long Oregon Coast Trail is a world-class tourism project meant not only to stimulate tourism industry alignment and partnerships between cities, counties, state and federal agencies and coastal-based organization, but also to inspire visitation and economic stimulus across the entire Coast region.

By investing RCTP dollars in this signature trail, the Oregon Coast Visitors Association has supported trail planning, mapping, trail signage, new trail development, trail enhancement and rehabilitation, as well as trail maintenance volunteers and trainings. They also launched the first-ever Oregon Coast Trail website complete with detailed maps, photos and visitor info: www.outdoorproject.com/articles/navigating-oregon-coast-trail.





PORTLAND REGION

RCTP allotment: \$2,908,000

REGIONAL INVESTMENT SPOTLIGHT VISITOR DEVELOPMENT FUND \$750,000 INVESTMENT

Through an unprecedented public/private partnership, the Visitors Development Initiative was created via an increase of the Multnomah County Transient lodging tax rate. The Visitors Development Fund (VDF) expends these revenues as well as a portion of those collected through vehicle rental taxes to maximize hotel occupancy and vehicle rentals through the attraction of convention and meetings business in the Portland Region.

With strong support from the local destination marketing organizations, Travel Portland invested RCTP dollars to support citywide convention business to create compression in the market to increase occupancy, rates and visitors to Multnomah, Washington, Clackamas and Columbia County.



Investing in the VDF paid big dividends with eleven large conventions secured at the Oregon Convention Center, representing a total of more than 41,000 contracted room nights, generating a citywide economic impact calculation of \$40:\$1. This ROI exceeds the target set of \$17:\$1 for leisure travel business in non-peak months (Nov. – Mar.) and \$40:\$1 in peak months.

GLOBAL STRATEGIC PARTNERSHIPS

Developing strong relationships with businesses, non-profits and government to enhance Oregon tourism investments and their impacts.

KEY PARTNERSHIP SPOTLIGHTS



Assisting in the development and launch of the **Oregon Tourism Leadership Academy** — a new program aimed at advancing tourism leaders' full potential to strengthen the industry.

Travel Oregon Investment:
\$35,000 & staff time



Helping visitors take a taste of Oregon wine home with them, **Oregon Wines Fly Free** allows Alaska Airlines Mileage Plan™ members to check up to one case of Oregon wine for free.

Travel Oregon Investment:
staff time



Supporting **SportOregon** to promote and market Oregon as a desirable destination for a wide-variety of sporting events.

Travel Oregon Investment:
\$55,000 & staff time



Working to connect Regional Development Officers, RDMO staff and the Oregon Tourism Studio program participants to support the **Rural Opportunity Initiative**.

Travel Oregon Investment:
staff time



Celebrating the 10th anniversary of Oregon-based animation studio LAIKA's film, **Coraline**, to raise more than \$10,000 for wildfire recovery projects and promote Oregon historical theaters.

Travel Oregon Investment:
\$10,000 & staff time



PARTNERSHIP SPOTLIGHT U.S. CAPITOL CHRISTMAS TREE

Since 1970, the U.S. Forest Service has provided a tree to appear on the West Lawn of the U.S. Capitol in Washington, D.C. for the holiday season. In 2018, the U.S. Capitol Christmas Tree came from the Willamette National Forest. An incredible opportunity to share Oregon's outdoor splendor with the nation, Travel Oregon partnered with Willamette Valley tourism entities, non-profit Choose Outdoors and the U.S. Forest Service to assist with community outreach, creative branding, social media, content creation, media and communications. More than 10,000 ornaments were created by Oregonians to decorate the Oregon Christmas trees in Washington, D.C. The Oregon congressional delegation participated in multiple celebratory events around the tree including the lighting ceremony.

WILDFIRES

In recent years, Oregon has seen an increase in the size and duration of wildfires — negatively impacting Oregon communities and the travel and tourism industry. To provide visitors with up-to-date wildfire messaging and to support the industry and agency partners, Travel Oregon focuses its efforts in three categories:

Preventative

- Coordinate with partner agencies to communicate with visitors what they can do to prevent wildfires, and how they can have a safe and fun trip in Oregon.
- Share resources with industry partners, so they are available before an emergency occurs in-hand.

During

- Communicate to visitors that “Oregon is open for business,” unless the Governor’s Office states otherwise.
- Redirect visitors to areas not actively fighting wildfire(s) or experiencing reduced air quality.
- Direct consumers to industry partner channels for the most up-to-date, local information.
- Participate in partner agency and community meetings to ensure messaging coordination and communicate tourism industry impacts to other agencies.

Recovery

- Promote communities impacted by wildfires.
- Work in partnership with other agencies to identify, connect and leverage resources.

VISITOR PERCEPTION STUDY

In 2018, Travel Oregon conducted an economic impact study finding that the 2017 Oregon wildfires resulted in \$51 million lost in visitor spending and \$16 million lost in earnings for employees and working proprietors in the travel and tourism industry.

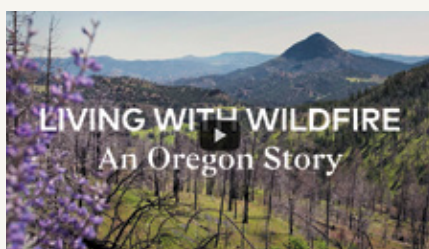
More than half of the businesses surveyed believed Oregon would see a decline in visitation due to the possible perceived risk and diminished destination image caused by wildfires. To test this theory, we worked with Longwoods International to conduct an additional study in 2019 to better understand the impact wildfires had on travelers during the event and the potential long-term impact on Oregon tourism.

In spring 2019, Travel Southern Oregon completed a visitor wildfire perception report for the Southern Oregon region, which had similar findings: www.southernoregon.org/industry/reports-documents

The visitor perception study found that among visitors who already thought of Oregon as a great destination, wildfires did not reduce the desire to come to the state. However, for those with a less positive image of Oregon as a destination perceived a higher risk, and their desire to travel to Oregon was, and is, negatively impacted by wildfires.

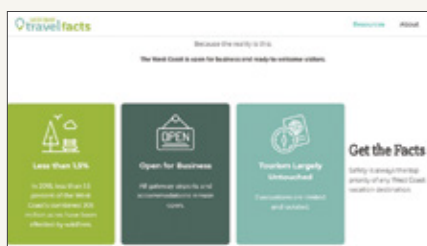
Additionally, with every wildfire, this perception can have a snowball effect and continue to negatively impact travel behavior. For destinations impacted by wildfires to endure, they must create and maintain a strong brand to build resiliency among visitors and help them overcome their concerns as it relates to their travel plans.





WILDFIRE VIDEO

To provide context and background on wildfires in Oregon, we produced a wildfire video to clarify wildfire misconceptions, offer a call to action to visit communities impacted by wildfire and provide reminders on how not to start human-caused wildfires.



WEST COAST TRAVEL FACTS

Working collaboratively with Visit California and the Washington Tourism Alliance, we produced westcoasttravelfacts.org to help eliminate wildfire misperceptions in the west while also giving visitors multi-state itineraries and a plethora of resources to make informed travel-related decisions.

GOVERNOR'S COUNCIL ON WILDFIRE RESPONSE

The Governor's Council on Wildfire Response formed in late January and has been meeting throughout the year. The council is tasked with reviewing Oregon's existing wildfire response and recommends comprehensive policy and program changes to meet current and future wildfire challenges.

Travel Oregon is participating in the Economic Recovery Subcommittee helping to identify policies and procedures to improve the resilience of local communities and economies to a range of possible disruptions caused by wildfires. The final plan will be submitted to the governor in fall 2019.

DESTINATION DEVELOPMENT

Creating robust and sustainable tourism economies by developing authentic, world-class experiences for travelers that aim to preserve, enhance and celebrate the local landscape and culture.

VISITOR EXPERIENCE DEVELOPMENT & ENHANCEMENT

Leading on, partnering with and, at times, directly funding tourism development-related projects across the state is a key component of our work to support the continued development of the Oregon visitor experience. This past year, Travel Oregon assisted with 31 projects across the state. We directly contributed \$86,876 and leveraged an additional \$36,150 in partner contributions to support and complete projects that make Oregon a better place to live in and travel to.



CULINARY & AGRITOURISM PROJECT HIGHLIGHT

Travel Oregon launched the **Oregon Food Trails** program to partner with tourism destinations across state to identify, assess and promote the diversity of their food-related experiences to visitors during all four seasons of the year. Our state's most unique culinary and agritourism experiences are often off-the-beaten-path, the Oregon Food Trails program seeks to inspire visitors to travel to those more rural areas and develop a stronger connection to the amazing Oregon products our farms and makers create.

Oregon Tourism Studio communities and local agritourism businesses partnered to develop four Oregon Food Trails, comprised of 196 businesses. Each food trail highlights three thematic elements that showcase the key features of its food-related experiences.

- **Great Umpqua Food Trail** highlights farmers markets, riverscapes and boutique wine.
- **East Gorge Food Trail** highlights orchard fruits, craft culture and cascade volcano views.
- **Wild Rivers Coast Food Trail** highlights berries, seafood and scenic landscapes.
- **South Willamette Valley Food Trail** highlights world-class wine and family-friendly farms.

OUTDOOR RECREATION PROJECT HIGHLIGHT

In collaboration with the Oregon Coast Visitors Association, Travel Oregon produced a **Fat Tire Biking the Oregon Coast** brochure series featuring twelve unique routes and six bicycle tourism businesses that rent or shuttle fat bikes from Brookings to Astoria. Capitalizing on emerging trends in adventure cycling, the brochures inspire visitors to experience lesser-traveled sections of the Oregon Coast, especially during the fall, winter and spring.



PHILANTHROPIC PROJECT HIGHLIGHT

Travel Oregon developed the Travel Oregon Forever Fund in 2012 to enable residents and visitors to give back to tourism-related projects that make Oregon a better place to live and visit. When people spend money at participating businesses a portion of the proceeds are donated to projects across the state.

In 2018, \$42,525 was raised providing seven project beneficiaries with \$6,000 each:

1. Oregon Coast: Explore Nature
2. Portland Region: Gateway Green
3. Southern Oregon: Restoring the North Umpqua Trail
4. Central Oregon: Cascade Lakes Mountain Bike Trail
5. Willamette Valley: Bunchgrass Trail Rehabilitation
6. Mt. Hood/Gorge: Ready, Set, GOrge!
7. Eastern Oregon: Oregon Desert Trail

To boost Travel Oregon Forever Fund donations during the 2019 Oregon Governor's Conference on Tourism, we partnered with Falling Sky Brewing to create the **Long Distance Lager** beer. \$1 from every pint sold during the conference was donated to the fund — raising \$810.

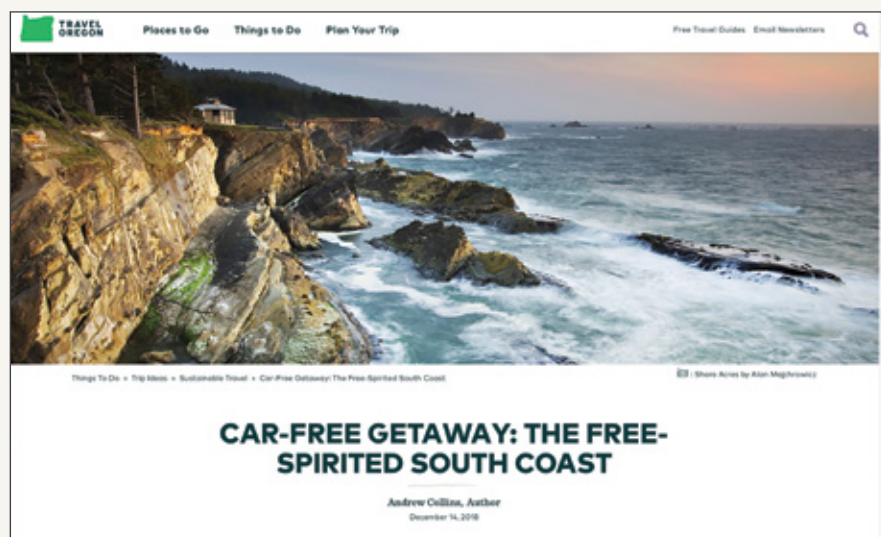


TRANSPORTATION PROJECT HIGHLIGHT

In an effort to enable more equitable access and reduce existing congestion in tourism destinations across the state, Travel Oregon identified and published **158 car-free visitor transportation services** on traveloregon.com. This new and robust visitor transportation information is featured on all city pages of the website, so visitors know what car-free options are available.

Additionally, the transportation section features **10 new car-free itineraries and stories** — providing a replicable approach for visitors reaching signature Oregon destinations without adding another passenger vehicle to our roads. Some of the car-free itineraries include:

- Florence and the Central Coast
- Taste the Good Life in Eugene
- The Free-Spirited South Coast
- Klamath Falls and Crater Lake





OREGON OUTDOOR RECREATION NETWORK

The Oregon Outdoor Recreation Network (OORN), comprised of 25 active partners, has a shared purpose of “ensuring access to world-class outdoor experiences for everyone.” Travel Oregon serves in the network management role and helps to advance seven priority strategies through multisectoral action teams:

1. Increase diversity in the outdoors:

Supported First Gentleman Dan Little’s Roadmap to the Outdoors initiative to increase engagement of youth and under-represented communities in the outdoors.

2. Quantify the economic impact of outdoor recreation — Economic Impact Study Action Team:

Released a request for proposal and selected a firm.

3. Develop a communications plan for responsible recreation — Communications Action Team:

Kicked-off the development of a statewide communications plan for responsible recreation.

4. Develop a statewide outdoor recreation network — Network Design Action Team:

Convened 46 stakeholders across Oregon — sharing outdoor recreation information and updates, exploring opportunities and barriers, fostering greater communication and collaboration in and across regions of the state.

Published the Oregon Outdoor Recreation Network Phase II Report.

5. Develop a signature trails strategy — Signature Trails Action Team:

Supported the 2018 Annual Oregon Trails Summit (201 attendees) and the Oregon Trail Coalition and Oregon Mountain Biking Coalition meetings.

Secured a firm to develop an advocacy tool outlining the signature trail vision and how that vision might be realized on Oregon Coast Trail.

6. Develop a statewide transportation strategy — Transportation Action Team:

Began collaboration with University of Oregon to develop transportation strategies to the outdoors from the Eugene area in preparation for the World Athletics Championships Oregon21.

7. Create an office of outdoor recreation:

Supported onboarding of the new Director of the Oregon Office of Outdoor Recreation.

Assigned a representative to serve on the Governor’s Task Force on Outdoor Recreation.



Governor Brown and First Gentleman Dan Little speak at the Oregon Outdoor Recreation Summit.

2019 OREGON OUTDOOR RECREATION SUMMIT

Travel Oregon, in partnership with Oregon State University, First Gentleman Dan Little, Oregon Parks & Recreation Department, Oregon Office of Outdoor Recreation and Oregon Department of Fish & Wildlife hosted the 2nd Oregon Outdoor Recreation Summit. A total of 331 people attended.

“The sessions really changed the way I think about marketing Oregon’s outdoors (for the better). I am going to be much more thoughtful when discussing inclusion, wellness and land management.”

“This felt like a conference with a heart, a real love for the place, the people, and the connection between it all.”

OREGON AGRITOURISM NETWORK

In 2015, Travel Oregon launched the Oregon Agritourism Network to cultivate Oregon's agritourism potential and advance Oregon's agriculture, food and beverage industries. Farmers, ranchers, chefs, food processors, guides, planners, regulators and community leaders are all encouraged to be a part of the network. This past year, to support the network, we have:

- Engaged 82 agritourism stakeholders across two Oregon agritourism coordination meetings.
- Delivered three workshops at the Oregon State University Small Farms Conference in Corvallis.
- Provided culinary and agritourism technical assistance to 125 farmers/landowners and 10 agencies/organizations.



JONI KABANA

RESOURCES FOR INDUSTRY PARTNERS

In consultation with these industry networks, Travel Oregon develops resources to support the industry more broadly. This past fiscal, we directly contributed \$131,700 to 25 industry projects and leveraged an additional \$77,900 in partner contributions.

INDUSTRY PROJECT HIGHLIGHTS

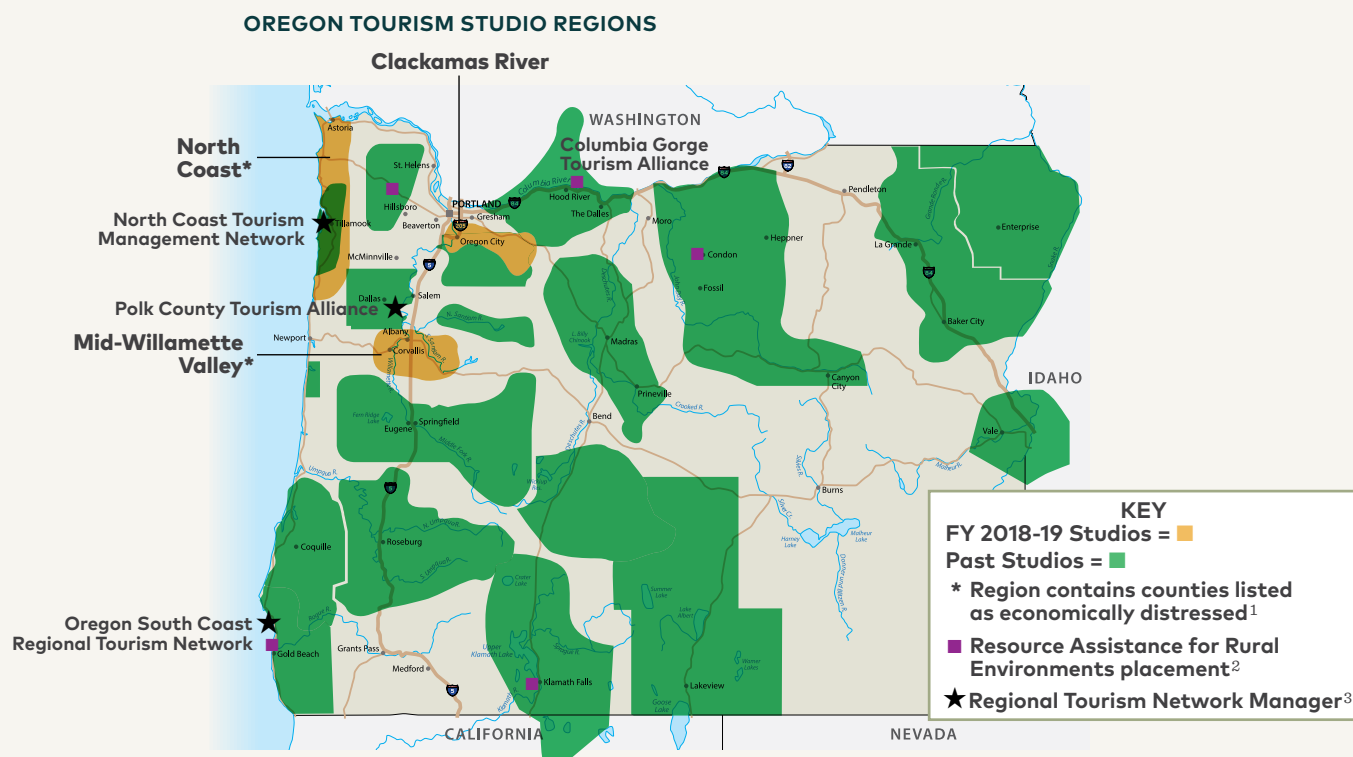
To support the success of new Oregon Food Trails and their participating businesses, we produced the **Oregon Food Trails Community Toolkit** and delivered three **Oregon Food Trail Business Engagement Workshops**, where a total of 88 businesses attended.

To increase awareness, support and funding for the completion of the Historic Columbia River Highway reconnection project, we funded the Oregon Department of Transportation's **Historic Columbia River Highway State Trail: Road to Connection communications plan**. Once the final five miles (including two segments between Viento State Park to Hood River) are completed, the state trail will offer 73 miles of multi-use, vehicle-free access to the Columbia River Gorge, connecting visitors to communities and boosting local economies.

To better understand visitor demographics, motivating factors for visiting, locations traveled to, overall satisfaction and suggestions to improve the visitor experience on Oregon's north coast, Travel Oregon partnered with the University of Oregon to conduct a **visitor opportunity study**. Key findings were used in the 2018 North Coast Tourism Studio — relating ways to reduce traffic congestion and increase longer and overnight trips.

OREGON TOURISM STUDIO PROGRAM

To help communities across the state increase their economic vibrancy by improving their appeal as visitor destinations, Travel Oregon offers the Oregon Tourism Studio program. The program helps communities cultivate regional visions, identify strategies to harness the power of tourism and develop unique experiences in culinary and agritourism, outdoor recreation, cultural heritage tourism and more.



¹Source: Business Oregon, based on data from the U.S. Bureau of Labor Statistics, U.S. Bureau of Economic Analysis and Oregon Employment Department. March 1, 2019. ²Resource Assistance for Rural Environments (RARE) Program placements are intended to increase the capacity of rural communities to improve their economic, social, and environmental conditions. ³Regional Tourism Network Managers are responsible for leading a cohesive, resilient network that supports the network's agreed upon vision and goals.

North Coast Studio

This Destination Management Tourism Studio — taking place through a series of workshops in Garibaldi, Seaside, Cannon Beach, Tillamook and Astoria — engaged 115 local stakeholders in developing a regional tourism vision, devising solutions to address critical management issues and planning to enhance cultural heritage and outdoor recreation visitor experiences.

The studio also resulted in the formation of a region-wide tourism network and three action teams focused on creating a trailhead ambassador program, developing visitor transportation options and launching a stewardship communication campaign.

Mid-Willamette Valley Studio

This Tourism Experience Studio engaged 42 local stakeholders in Corvallis to develop and grow culinary and agricultural tourism opportunities in the area. The studio focused on ways to promote local businesses, expand upon collaborative tourism experiences and support the regional food system to create a thriving destination with strong agricultural roots.

The studio resulted in the formation of an action team focused on developing the Mid-Willamette Valley Food Trail.

Clackamas River Recreation Studio

This first-ever River Recreation Studio which took place in Estacada and Oregon City, engaged 61 stakeholders in developing a unique approach to grow and manage the visitor experience on the upper and lower Clackamas River.

The studio resulted in the formation of an action team focused on developing a trailhead ambassador program.



RARE placements

POST-STUDIO SUPPORT

To support momentum ignited during Oregon Tourism Studios, Travel Oregon offers a suite of services and development opportunities for communities that have graduated from the program. This past year, we have:

- Provided \$90,500 for five tourism development staff positions placed at organizations throughout Oregon through the Resource Assistance for Rural Environments (RARE) Program, in partnership with the University of Oregon. These funds helped leveraged an additional \$201,500 contributed by RDMOs, DMOs, and other local/regional partners to support the positions.
- Hosted a two-day Network Design Training for 17 regional network managers and core team members from across the state to collaborate and share best practices on effective tourism network management.
- Provided technical assistance to 13 entities on grant writing, tourism network design and project development consulting to 21 communities.
- Supported and co-funded four post-Oregon Tourism Studio Summits in Oregon's Outback, Klamath Basin, Columbia River Gorge and Polk County.

ADDITIONAL EDUCATION & TRAINING

Together, we can do something even greater. These opportunities are tailored to extend the reach and impact of Oregon's efforts so that we maximize the resources of the entire Oregon tourism industry.

OREGON GOVERNOR'S CONFERENCE ON TOURISM

The Governor's Conference exists to bring the tourism industry together to educate, inspire and connect. Through innovative programming, we help advance, guide and align Oregon's seven tourism regions.

Highlights

- Hosted at the new Graduate Eugene hotel
- 463 stakeholders attended from all seven regions
- 572 room nights were sold
- 42 businesses exhibited
- 38 sponsors supported the conference
- 12 tourism awards were given



Oregon Governor's
Conference on Tourism

TRAVEL OREGON 101

This complimentary seminar is designed to benefit visitor-related businesses, organizations and communities. Participants come away with an increased knowledge of the many opportunities available through Travel Oregon and the network of local, regional, national and international industry partners.

Highlights

- Nine seminars (both in person and online) took place across the state — engaging more than 290 people



GUEST SERVICE TRAINING

Travel Oregon and the Oregon Restaurant & Lodging Association Education Foundation have partnered with the American Hotel & Lodging Educational Institute to bring the Oregon travel and tourism industry an accredited and internationally recognized customer service training program, Guest Service Gold®.

Highlights

- 23 new trainers have been qualified to deliver Guest Service Gold trainings
- 705 new students received Guest Service Gold certification



INTERNATIONAL SALES DEVELOPMENT WORKSHOPS

In partnership with RDMOs, we support international sales development workshops. With workshops tailored to each region's specific needs, local businesses are invited to attend for free, coming away with the tools to better market to and provide services for international visitors.

Highlights

- Workshops took place in the Mt. Hood/Gorge and Eastern Oregon regions — engaging 31 locals — resulting in seven one-on-one appointments with local businesses and a new Eastern Oregon-only itinerary for visitors.

"This training was very informative. I didn't consider working in the hospitality [industry] but I would now."

– Guest Service Gold
program participant

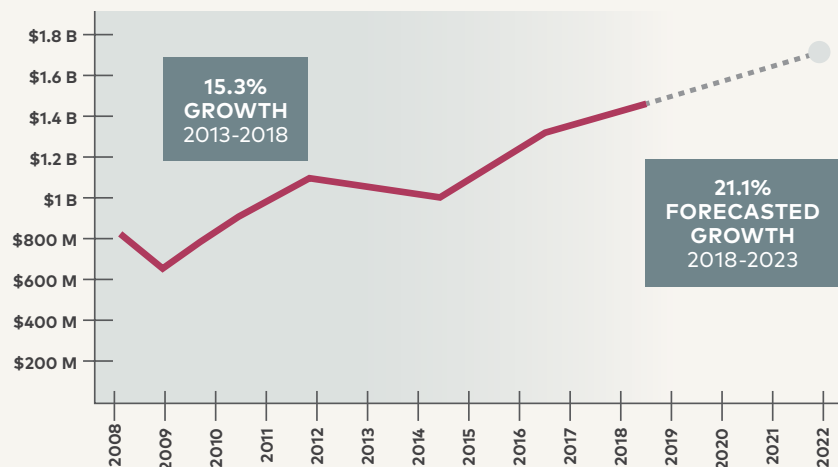
GLOBAL SALES

Increasing international inbound leisure travel to Oregon through travel trade, media, marketing and consumer events in key international markets and by supporting international nonstop airline service.

INTERNATIONAL VISITOR SPENDING

In 2018, international visitors spent \$1.39 billion in Oregon, a 4.9% increase from 2017, compared to the national average of 1.2%.

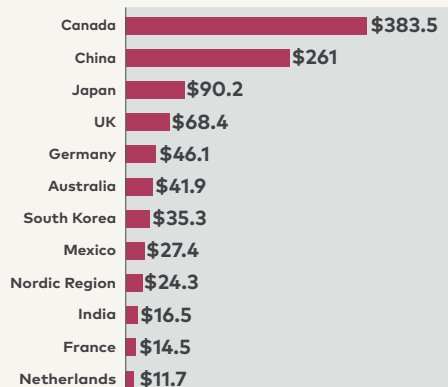
TOTAL INTERNATIONAL SPENDING IN OREGON



*Source: Tourism Economics

2018 SPENDING BY COUNTRY

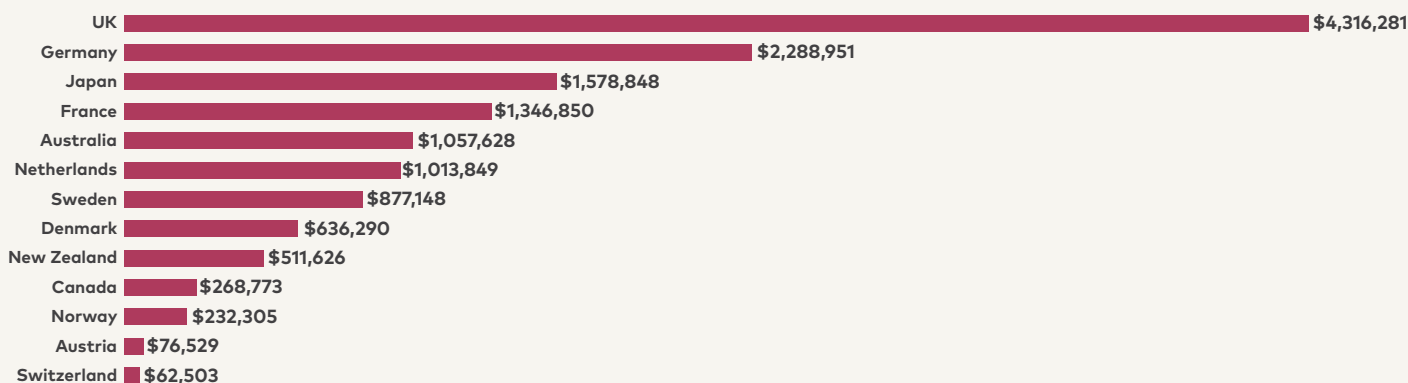
In millions of dollars



INTERNATIONAL MEDIA

By bringing international media on press trips to experience all that Oregon has to offer, from Dufur to Anthony Lakes and the North Umpqua, we're able to influence authentic media coverage across the globe. With the help of RDMOs, DMOs and local businesses throughout the state, Travel Oregon hosted 38 international media/press trips — resulting in 1,146 online and print Oregon travel stories published in other countries.

TOTAL EARNED MEDIA VALUE



NEW ZEALAND HERALD

The New Zealand Herald published two stories in their travel magazines, "Bend in the Road" and "Portland Three Ways" based on journalist Stephanie Holmes' familiarization trip to Oregon. These 6-pages of print and digital coverage reached an estimated 1.1M New Zealanders and was valued at \$147,000.



LE POINT MAGAZINE

"Bouillon de nature en Oregon," published in Le Point magazine — comparable to Time Magazine for France — had a media value of \$138,000 for print and \$68,000 for web for a total of \$206,000.

TRAVEL TRADE FAMILIARIZATION TRIPS

Throughout the year, Travel Oregon hosts international tour operators/agents — bringing them across Oregon on travel trade familiarization trips (FAMs) — giving them an in-person taste of Oregon's foods, outdoor recreation assets, friendly communities and more. With help from our partners, we hosted 27 FAMs with tour operators/agents from 14 countries — including two Brand USA co-sponsored MegaFams from Mexico and Australia/New Zealand.

As a result of Travel Oregon's work internationally, tour operators/agents from across the globe began offering 425 new Oregon experiences, such as tour itineraries/packages, available to international visitors to book — featuring more than 850 Oregon hotels.

NEW OREGON EXPERIENCES FOR GLOBAL VISITORS

- Amplitudes Creator de Voyages, based in France, added a new 16-day Oregon-only itinerary featuring the Portland region, the Oregon Coast, Southern Oregon, Central Oregon, Eastern Oregon and the Mt. Hood/Gorge Region.
- Flight Centre, based in the United Kingdom, added two new fly-drive itineraries exclusively featuring Oregon:
 - The Oregon Coast & Mountains tour, a six-night itinerary with overnights in Portland, Cannon Beach, Newport and Sisters.
 - Oregon Highlights Tour, a 10-night itinerary with overnights in Portland, Astoria, Tillamook, Florence, Ashland, Sunriver and Mt. Hood.
- DTA, based in Chengdu, China, created two new “VIP” small group packages under their U Best Holiday brand. These exclusive six and nine-day programs feature the Oregon Coast, Portland, Mt. Hood/Gorge and Willamette Valley regions.
- JTB World, based in Japan, created a three-day multi-state group tour itinerary that includes stops in Portland, Bend and Crater Lake National Park.

OREGON ROAD RALLY

Travel Oregon hosts the Oregon Road Rally to bring tour operators/agents, influencers and media from key international markets together for an epic seven-day FAM across the state.

The Oregon Road Rally will continue to have long-term ROI, however immediate successes include:

- 25 agents and media participated from 10 countries: Germany, France, U.K., China, Australia, New Zealand, Korea, Canada, US and The Netherlands.
- Participants met with representatives from all seven regions — with over 120 appointments taking place.
- More than 140 Oregon tourism partners and businesses helped make the FAM a success.
- 400 social media posts took place with 61,295 engagements.
- Intrepid Travel, an Australian-based tour operator, is updating their Oregon itinerary for 2020, including an additional overnight.
- CRD, a German-based tour operator, now offers additional overnights in Baker City and Pendleton and offers Portland Spirit Cruises as an optional excursion.
- Explorer Fernreisen, a German-based tour operator, included an Oregon/Washington fly drive tour called “River Wild!” in their Explorer Self Drive Brochure, which is being distributed as a supplement in their USA Brochure.



Travel Courier, a Canadian travel magazine featured Oregon Road Rally with a 4-page article

TRADESHOWS & SALES MISSIONS

Travel Oregon, with partners from all seven regions, attends trade shows and sales missions in order to showcase Oregon on a global scale. Through this international outreach, we generated 740 travel trade and media leads last year alone. These leads are shared with each of the seven RDMOs to follow up on and make direct relationships.



CONNECTING KEY MARKETS

Oregon boasts 11 international nonstop flights to Portland International Airport:

- | | |
|---------------------|---------------|
| ▪ Amsterdam | ▪ Guadalajara |
| ▪ London Heathrow* | ▪ Tokyo |
| ▪ Reykjavik * | ▪ Toronto* |
| ▪ Frankfurt | ▪ Calgary |
| ▪ San Jose Del Cabo | ▪ Vancouver |
| ▪ Puerto Vallarta | |

*seasonal flights



GLOBAL MARKETING

Inspiring statewide overnight travel through innovative advertising and world-class messaging and content.

ADVERTISING CAMPAIGNS

In fall 2018 and spring 2019, Travel Oregon re-launched the extremely successful **Only Slightly Exaggerated** (OSE) campaign with new art and animation. OSE's core strategy is encouraging visitors to find happiness off the beaten path, all over Oregon. To disperse visitation and economic impact throughout the state, we showcased new tourism experiences and a wide variety of destinations across all seven regions. To increase shoulder season visitation, we promoted winter travel by producing seven stand-alone limited edition, collectible posters, which were only available to visitors in-region.



KEY MARKETS



For each campaign, Travel Oregon creates advertising co-operative opportunities available to each regional tourism entity to fit their budget and leverage our media buys. We produce digital assets — available in campaign toolkits — to be used by tourism entities across the state at no cost to them.

To bring the OSE campaign to life and motivate visitation to rural communities, we partnered with the Oregon Cultural Trust to create the **Oregon Mural Trail**. Seven whimsical hand-painted murals were painted by the Oregon-based non-profit, Forest for the Trees, bringing the campaign's captivating artwork to public spaces in Forest Grove, The Dalles, Yachats, Prineville, Ontario, Oakridge and Roseburg.



CAMPAIGN RESULTS

Video views	31,788,987
Sessions on traveloregon.com	1,755,737
Paid & organic impressions across TV, digital, billboard, cinema, search and social	266,138,925
Enews subscribers	116,300
Facebook fans	449,890
Twitter followers	131,892
Instagram followers	290,773
Visitor guide orders	50,174
PR circulation	174,600,000

"ONLY SLIGHTLY EXAGGERATED" JAPAN ACTIVATION

As one of Oregon's top-three international markets, Travel Oregon brought OSE to Japan over four days with a pop-up activation. Taking over the café and lobby of the Hotel Koe in Tokyo's heavily trafficked Shibuya neighborhood, the event showcased Oregon as a destination filled with stunning natural beauty and breathtaking cityscapes. Decorated with a lush interior reminiscent of the natural environment of Oregon, consumers could experience our state in Japan through animated holograms, a 13-foot tall rendering of the rabbit featured in the OSE video, dioramas of the seven tourism regions at the event space and an Oregon-inspired menu at the café.

- More than 100 industry/media and 500 consumers attended.
- With social content, radio broadcast spots and the live event, the activation resulted in 4.37 million impressions; 50,288 video views; 33,695 engagements and 3,160 website clicks.



Traveloregon.com had a record year with
4.2 million web sessions

INTEGRATED & DIGITAL CONTENT

Our sense of place and an understanding of our history and shared values drives Travel Oregon's approach to telling the story of Oregon. With our content across all owned and managed print and digital platforms, we aim to be the most trusted resource for Oregon travel information and trip inspiration.

- Total stories published: 240
- Website traffic: 4.2 million sessions (up 6.1% over 2017-18)
- Potential travelers reached via social media: 2.9 million

Travel Oregon specializes in telling stories about the places in Oregon we love while creating nuanced, meaningful content that is helpful to the reader. Our stories are conversational and convey simple truths about the wondrous places of Oregon without making our audience feel like they're being marketed to. We are deliberate in our content to inspire people to stay a little longer, explore a little further — getting off the beaten path, so they can experience all of Oregon — creating more widespread economic impact and job creation.



SPANISH CONTENT

To more effectively reach and inspire Spanish speaking travelers from the north-west to take part in Oregon's outdoor recreation opportunities, we partnered with ViveNW and former OPB journalist Roxy De La Torre to leverage the momentum of our OSE campaign by providing Spanish content on traveloregon.com.

While we have maintained a Spanish language website that caters to the Mexico market via traveloregon.mx and published a Spanish language print guide promoting Scenic Byways with the Oregon Department of Transportation, spring 2019 marks the first time we created digital content for domestic Spanish speaking audiences.

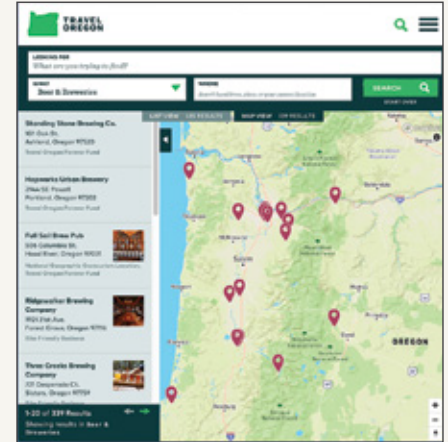


OREGON TOURISM INFORMATION SYSTEM (OTIS)

OTIS is a collaborative platform used for sharing and maintaining Oregon's tourism listings and content, so visitor information is robust and up-to-date on traveloregon.com. Since relaunching OTIS in 2017, industry adoption has grown from 26 partners utilizing the platform to 85 partners.

Key partners include:

- Oregon Parks & Recreation Department
- Oregon State Marine Board
- Oregon Wine Board
- Oregon Restaurant and Lodging Association
- Recreation.gov
- And numerous destination marketing & management organizations



VISITOR LIFECYCLE MANAGEMENT (VLM)

In summer of 2019, we launched the VLM platform — marking a significant step toward a data-driven approach optimizing the effectiveness of Travel Oregon's marketing. Consumer data being collected is utilized to identify where consumers are in their travel planning process and will then help guide them as they move through the cycle. The traveloregon.com website fly-ins and consumer email newsletters have been built, tested and launched in the new VLM environment allowing us to offer more personalized and timely content that drives visitors to specific activities and disperse visitation to rural areas while also promoting shoulder season travel, thereby optimizing our economic impact across the state.



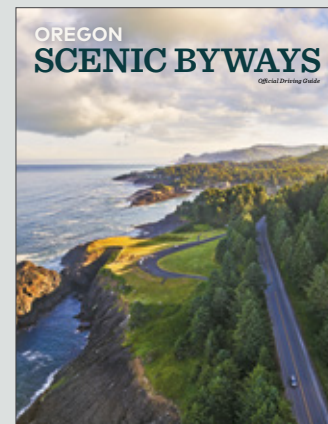
VISITOR GUIDES

Travel Oregon Visitor Guide

Number distributed: 257,000

Oregon Scenic Byways Official Driving Guide

Number distributed: 115,000



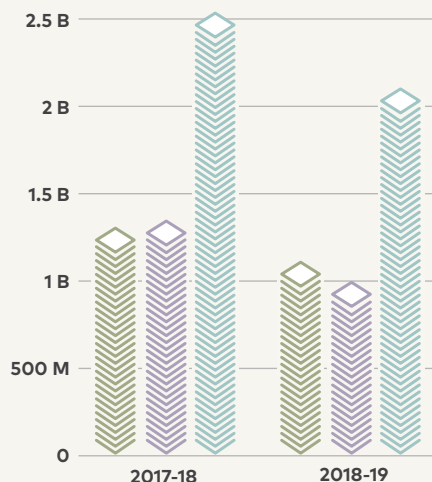
CONSUMER MEDIA & INDUSTRY COMMUNICATIONS

Travel Oregon works to support and empower tourism partners through media outreach, creating third-party endorsements that are an effective and efficient way to inspire travelers to choose Oregon as their vacation destination. In 2018-19, we saw success in both consumer and industry coverage:



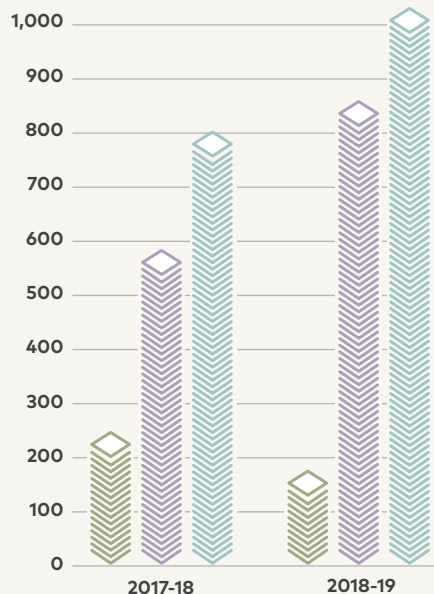
Circulation

FY 2017-18 vs. FY 2018-19



Media Articles

FY 2017-18 vs. FY 2018-19



SOLAR ECLIPSE COLLABORATION

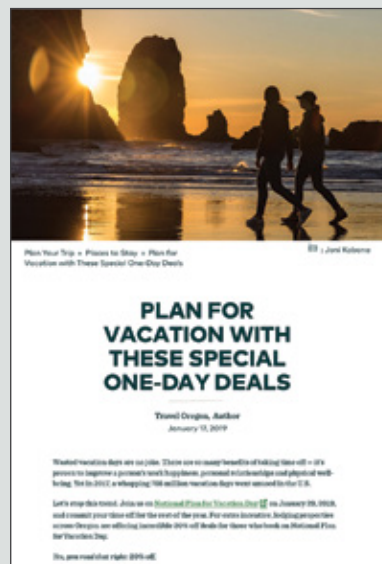
Travel Oregon received both a Mercury Award by the National Council of State Tourism Directors and a Public Relations Society of America Spotlight Award for our 2017 solar eclipse collaborations with federal, state, local and tribal partners.



U.S. TRAVEL
ASSOCIATION

INDUSTRY.TRAVELOREGON.COM

In order to better serve the Oregon tourism industry and ensure we facilitate quick access to the latest trends, research and opportunities for our partners, we redesigned and relaunched our industry site in 2019.



To further enhance media coverage and support partners, Travel Oregon:

- Participated in **National Plan For Vacation Day** – inviting visitors and locals to book a hotel room at a discounted rate. 50 hotels participated across the state, seeing an uptick in bookings during January:

"We experienced a 25% increase in bookings from this promotion. Well done! Hope this will be an annual thing!" – **Barbara Sidway, Geiser Grand Hotel, Baker City**

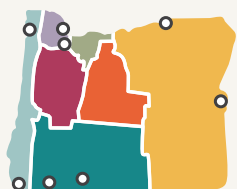
- Created the **Travel Matters video** – highlighting why travel matters to communities across Oregon.

- Attended **deskside meetings** with top-tier media in New York, Washington D.C., Los Angeles and San Francisco.

- Co-hosted with Travel Portland the first ever **Oregon Media Marketplace** to connect RDMOs with more than 40 Oregon freelance journalists.



WELCOME CENTERS



Travel Oregon operates eight staffed welcome centers at key entry points around the state.

The newest center, located on I-5 south of Ashland at the ODOT Siskiyou Rest Area, opened its doors to Oregon's

visitors on July 31, 2019. It offers important visitor amenities including a children's play area, device charging stations, a wide array of printed brochures and guides for each region, and comfortable furniture. Changeable campaign artwork throughout the center serves to inspire visitors and tie in Travel Oregon's marketing efforts.

Welcome centers are an essential part of a visitor's experience, providing in-person engagement with Travel Oregon's brand. We can offer visitor services throughout the state, thanks to critical partnerships with the following agencies and organizations:

- Oregon Parks & Recreation Department
- Oregon Department of Transportation
- Oregon Travel Information Council
- Port of Portland, Portland International Airport
- SAGE Center, Port of Morrow
- Seaside Visitors Bureau, City of Seaside
- Travel Southern Oregon
- End of the Oregon Trail Interpretive & Visitor Information Center, Clackamas County Tourism & Cultural Affairs

VISITOR STATISTICS

- Travel Oregon Welcome Centers received visitors from all 50 states and at least 61 countries.
- Top five countries visitors came from: Canada, Germany, United Kingdom, France and Australia.
- More than 190,000 travelers visited at least one of the welcome centers with August seeing the highest volume of visitation.
- The Welcome Center at PDX reported the highest number of visitors: 58,600, approximately 30% of the total visitor volume across all centers.

"We had outstanding service at the visitor center just now! Staff were amazing and friendly! We are from Minnesota and they were above and beyond 'Minnesota Nice'!"

– Lindsay, Minnesota

"She was the friendliest and most helpful member of travel staff I have come across in all my years of travel. She was very knowledgeable and obviously enjoyed her job, taking the time to ensure I got the most of my time here."

– Nick, Australia

"I am happy, for the staff there is very passionate. I can enjoy coffee, exquisite postcard."

– Yongji, China

VISITOR COUNTS

