

# STRATEGIC PLAN PROGRESS REPORT

FEBRUARY 2020



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.

This Strategic Plan Progress Report (SPPR) is a high-level summary of key initiatives and programs embedded within Travel Oregon's 2019-21 Strategic Plan. The plan was adopted by the Oregon Tourism Commission following review by the Governor, Oregon Legislative Assembly, Oregon travel industry trade associations, applicable state agencies, Oregon's tourism industry and the public. This SPPR is provided to the Oregon Tourism Commission and shared with Oregon's tourism industry and other interested parties to report on program advancement, key learnings, agency and industry performance metrics and general updates on the 2019-21 Travel Oregon Strategic Plan since the Commission's last meeting.





# MESSAGE FROM CEO



Dear Commissioners,

As we welcome a new year and a new decade, I look forward to being with you in Independence, Oregon – a thriving small community on the banks of the Willamette River. Our industry partners in the Willamette Valley are excited to welcome us to their

revitalized community. Should you arrive early, or stay late – there are plenty of engaging activities for you to enjoy including:

- 200 wineries in the [Willamette Valley AVA](#) – over 20 within 25 miles of Independence
- Birding and wildlife viewing at [Baskett Slough National Wildlife Refuge](#)
- [Explore Polk Co. on bicycle](#) – ride many of the cycling routes in Polk. Co. for off-road cycling – check out [Black Rock Mountain Bike Trails](#)

Overnight accommodations will be at the new [The Independence](#) (A Trace Hotel) located at [201 Osprey Lane, Independence](#). The hotel features a rooftop deck overlooking the Willamette River, 24-hour bike work room, EV parking and overnight rooms that include: in-room bike storage, original art by local artists and locally made bath products. Our meeting location is just a few short blocks away at the [Independence Event Center](#) (555 Main St.).

Our agendas are designed to help make our time together productive and informative. We'll be receiving, reviewing and discussing updates on:

- Oregon21 Grants
- Oregon Tourism Workforce Assessment
- Travel Oregon 2021-23 Strategic Plan Roadmap
- 2020 Legislative Session
- Tourism Economic International Research
- “Take Care Out There” Initiative
- Only Slightly Exaggerated (OSE) Fall Campaign Recap and Spring Campaign development

On Monday evening February 24, starting at 6:30 p.m. we will join local industry and RDMO partners for dinner at Valkyrie Wine Tavern (301 South Main St.) Dress for the evening is casual and the location is easily walkable from hotel and meeting space.

Thank you for your continued service to the Oregon Tourism Commission and to the State of Oregon. Should you have questions on any of the materials provided, please don't hesitate to contact me in advance.

Safe travels and we'll see you in Independence!

Best regards,

**Todd Davidson**  
CEO

## OREGON TOURISM COMMISSION



Chair

**Scott Youngblood**



Vice Chair

**Nigel Francisco**



**Don Anway**



**Richard Boyles**



**Lucinda DiNovo**



**Maria Ponzi**



**Mia Sheppard**



**Kenji Sugahara**



**Greg Willitts**



An aerial photograph showing a blue and white checkered hot air balloon floating over a dark, reflective body of water. To the left, a dense forest with trees in shades of green and yellow borders the water. In the background, rolling golden-brown fields are visible under a soft, hazy sky.

# VISION

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

# MISSION

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

# VALUES

## EVERGREEN

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

## TRAILBLAZE

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

## TRUE NORTH

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

## CANOPY

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



# EQUITY STATEMENT

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

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

## **We are committed to the following shared values:**

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

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



PHOTO: RUSS ROCA





CENTENNIAL  
BRIDGE  
BUILT 1987





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### SUPPORT AND EMPOWER OREGON'S TOURISM INDUSTRY

- 21** Offer development and training opportunities to meet the needs of the industry
- 22** Support and enhance an industry-leading information network as the trusted source for all things Oregon
- 23** Convene industry action networks to influence stakeholder action and increase collaboration

### CHAMPION THE VALUE OF TOURISM

- 24** Grow and align strategic partnerships and stakeholder base to leverage resources and build capacity
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### RUN AN EFFECTIVE BUSINESS

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# OREGON TOURISM COMMISSION BRIEFING

Monday, Feb. 24, 2020  
1–3 p.m.

Independence Civic Center  
555 South Main St.  
Independence, OR 97351

**Welcome and Introductions**

Chair Youngblood

**Oregon21 Grant Update**

Lisa ITEL, Michelle Woodard  
& Sarah Massey

**Oregon Tourism Workforce Assessment**

Andrew Grossmann, Ladan  
Ghahramani & Andrew Dyke

**Spring Meetings Preview**

Destination Capitol Hill

Sara Morrissey

Rural Tourism Conference

Carole Astley

**2021-23 Strategic Plan Roadmap**

Scott West

**Review of Feb. 25 Commission Meeting agenda**

Todd Davidson

**Other Business**

Chair Youngblood

TRAVEL



OREGON



# OREGON TOURISM COMMISSION MEETING

Tuesday, Feb. 25, 2020  
9 a.m.-12 p.m.

Independence Civic Center  
555 South Main St.  
Independence, OR 97351

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

<b>Welcome and Introductions</b>	Chair Youngblood
<b>Chair Remarks</b>	Chair Youngblood
<b>Local Welcome</b>	
<b>Public Comment</b>	Chair Youngblood
<b>Commission Business</b>	Chair Youngblood
Review of Commission Packets	
CEO Evaluation Process	
<b>Commission Action</b>	Chair Youngblood
Approval of Minutes	
Appointment of Nominating Committee	
<b>Reports, Updates &amp; Discussions</b>	
Tourism Economic International Research	Petra Hackworth & Geoff Lacher
“Take Care Out There” Initiative	Andrew Grossmann, Kelda Schmidt & Bonnie Lippitt
Only Slightly Exaggerated Campaign	
Fall Campaign Recap	Bryan Mullaney
Spring Campaign Development	Katy Clair
2020 Legislative Session	Sara Morrissey
<b>Other Business</b>	Chair Youngblood
<b>Adjourn</b>	Chair Youngblood

*If you have any questions or comments related to today's proceedings or presentations, please email us at [industry@traveloregon.com](mailto:industry@traveloregon.com) and indicate “February 2020 Commission Meeting” in the subject line.*

*Next Tourism Commission Public Meeting – June 16, 2020, Lakeview, Oregon*





# OPTIMIZE STATEWIDE ECONOMIC IMPACT

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

## PRODUCT DEVELOPMENT AREAS OF STATEWIDE SIGNIFICANCE

### Oregon Food Trails

The North Coast Food Trail, established in 2018, was rebranded in early 2020 to join the established Oregon Food Trails brand. The content of the trail will remain mostly unchanged, featuring 85 businesses along the northern section of the Oregon Coast, from Seaside to Neskowin. The new brochure format will allow Travel Oregon to better market the amazing culinary and agritourism experiences available along the North Coast as part of the Oregon Food Trails family.

### Oregon Food Trails Business Engagement Workshop

On January 27-28 Visit Tillamook Coast conducted two business engagement workshops for returning and new businesses on the North Coast Food Trail; Travel Oregon attended these meetings.

On February 4, Travel Oregon delivered an Oregon Food Trails Business Engagement Workshop for businesses participating in the new Mid-Willamette Valley Food Trail. The workshop comes in advance of the launch of the food trail to help businesses build and improve collaboration and partnerships along the trail. The content of the workshop included a session on demystifying marketing, exercises around visitor readiness and presentations around how to bolster exposure by working with local DMOs and the Willamette Valley Visitors Association (WVVA). The event was also a great networking opportunity for the 50 businesses participating in the trail.

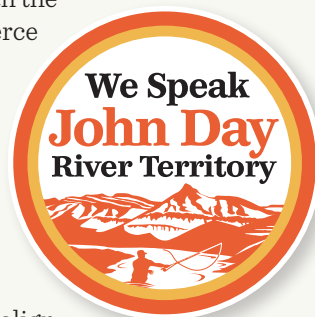
*Support high-use destinations to manage the impacts that stem from visitation*

## FRONTLINE STAFF TRAINING

### We Speak John Day River Territory

Travel Oregon partnered with the Condon Chamber of Commerce and the John Day River Territory Tourism Studio Steering Committee to develop a We Speak John Day River Territory program. We Speak programs educate and train frontline tourism staff in destinations to improve and align

local interpretation of the destination. Participating destinations compile key information about signature tourism opportunities and host trainings for local tourism staff related to them. The intended outcome of the program is broader awareness and communication across the destination about experiences and assets available to visitors and how visitors can best access and enjoy them.



The local proponents finalized their program logo at the start of 2020 and confirmed that they will focus their initial trainings on the topics below:

- Cultural heritage of the John Day River Territory.
- Hiking in and around the John Day River Territory.
- Tourism events in the Condon area.

Next steps are for the Condon Chamber of Commerce to compile content for each topic and host public information sessions as part of their monthly chamber meetings to educate frontline staff about these tourism opportunities in their destination.

### Oregon Guest Service Gold Spanish Language Version

### Guest Service

To continue to increase the accessibility of our programs, Travel Oregon partnered with the Oregon Restaurant and Lodging Association Education Foundation (ORLAEF) to develop a Spanish language version of the internationally accredited Oregon Guest Service Gold® program. The new version of the program is available online and ORLAEF is in the process of identifying trainers that can deliver the content to groups through in-person trainings in destinations.





## Oregon Guest Service Gold Scholarship Opportunity

To support increased adoption of the Oregon Guest Service Gold® program, Travel Oregon partnered with the ORLAEF to launch a scholarship opportunity for destination marketing and/or management organizations in Oregon to receive funding to support local participation in the program. Up to \$20,000 is available for distribution on a rolling basis to entities that submit an expression of interest to ORLAEF before June 26.

*Inspire overnight leisure travel  
from key markets*

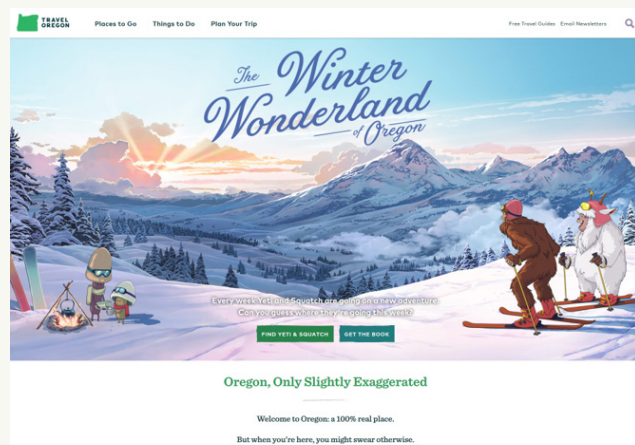
## FALL MARKETING CAMPAIGN 2019/2020

On October 15 the fall campaign (in the Only Slightly Exaggerated [OSE] style) launched with weekly “chapters” following the adventures of Yeti and Squatch on traveloregon.com. The full story was made into a physical book (2,000 in English, 500 in Spanish) available to consumers through online orders, at regional book reading events, state Welcome Centers and through regional partners. The book was also available in PDF on traveloregon.com in English and Spanish.



### Web

Yeti and Squatch’s journey was brought to life through an [interactive story](#) on traveloregon.com. With each weekly chapter, website visitors were given the option to find Yeti and Squatch, or order a copy of the book; visitors who opted to find the big-footed buds were



dropped into the current week’s chapter and provided inspiring trip ideas that paralleled the adventures of Yeti and Squatch. Visitors were also able to navigate to previously released chapters, find out when the next chapter would be released and explore previous iterations of the OSE campaign.

### Owned Content

More than 50 stories were featured on a [new website template](#) that replicated chapters of a book. We continued to showcase the illustrations’ real-life locations and promote the availability of campaign posters at Travel Oregon Welcome Centers. We focused on video content, producing seven 15-second clips that connected to campaign themes and two [book trailers](#) that caused spikes in book orders. As the seasons changed, stories that highlighted winter itineraries and lodging options resonated with our audience.

To reach Spanish-speaking travelers, we translated seven regional winter itineraries and hyper-targeted them across social.



### Traveloregon.com – Results

The content was well-received by our audience. Traffic and engagement (session duration), were up 23.5% and 14.1% respectively compared to last fall’s campaign.

YoY - All Users	2018/19 10/20 - 12/21	2019/20 10/15 - 12/16	Change
Number of sessions	757,060	935,184	23.5%
Number of users	573,986	734,711	28.0%
Pageviews	2,302,399	4,318,637	87.6%
Pages/session	3.04	4.62	52.0%
Avg. session duration	1:39	1:53	14.1%
Bounce rate	71.1%	75.1%	5.6%
% New sessions	757,060	935,184	23.5%



### Key Learnings:

- 23.27% of visitors clicked to deeper content from the weekly landing pages. While this was lower than last year's campaign (25%), it still shows that visitors are inspired by the specific creative of the campaign and seek to re-create these experiences.
- Birding (Klamath), hot springs (Willamette Valley) and fishing (John Day) were the most popular activity pages with nearly 45% of all campaign related page views. This reinforced the fact that visitors are interested in a broad array of winter experiences beyond snow activities.

### Co-Op Content

Three RDMOs (Oregon Coast, Willamette Valley and Southern Oregon) participated in Travel Oregon's fall content co-op program. Part of the RCTP program, the co-ops offered three tiers of participation for regions (\$5,000, \$10,000 and \$15,000) with a 50% match by Travel Oregon.

Deliverables for the participating region included stories on [traveloregon.com](#), paid social media support, influencer tours (Instagram takeovers, photo assets and web stories), and the opportunity to partner on premium content (video and photo assets).

The effort sparked the production of nine stories, three influencer trips and one premium content video shoot for the Oregon Coast. Themes included [winter recreation near Crater Lake](#), [foodie stops in the Willamette Valley](#) and the [photo-worthy Central Oregon Coast](#). The social media promotion targeted demographics outside of Oregon, amplifying the voices of these RDMOs in key drive markets.

### Paid Media Results Overview

(See appendix A for Paid and Social Media parameters)

The campaign results were strong; below is a recap of performance by channel:



### Custom Partnerships

- Our custom partnership included Portland Monthly and Travel+Leisure. Across all ad units, the partners averaged a click-through-rate (CTR) of 0.66%, which was more than the industry benchmark of 0.1%.
- In print, we partnered with Portland Monthly to run two sets of print ads. The December issue included a three-page spread on the front cover which featured three images; the January issue had a folded insert which featured eight images.

### Digital Banners

- For digital display, we partnered with Pinterest and Sunset Magazine to leverage the weekly roll-out of the Yeti and Squatch story. The strategy led to a 0.64% CTR, which was more than the industry benchmark of 0.1%.
- Remarketing banner ads on Google's ad network continued to be a productive strategy.
  - Compared to last fall, and with a 32% decrease in spend, we generated a 206% increase in clicks (13,594) with a 78% decrease in cost per click (CPC) (\$0.67).
  - Compared to digital display partners, our remarketing buy had the lowest CPC at \$0.67 and the lowest cost per thousand (CPM) at \$3.27.
  - Against the same partners, the remarketing buy had the lowest cost per booking at \$60.58.

### Online Travel Agency (OTA)

- OTA partnerships with TripAdvisor and Sojern performed well. This proved that engaging with visitors in the traveling mindset is an effective strategy.
  - From a web performance standpoint, our OTA buy surpassed last year's buy, generating 51% more sessions and better engagement with a 6% less spend.
  - From an attribution standpoint, our OTA buy generated more bookings (11,923) with a lower cost per booking than last year (\$18.66 vs. \$23.24).

### Search

- Paid search continued to be a consistent and effective traffic driver. Compared to last fall, and with a 6.2% decrease in spend, we increased clicks by 91%. We also decreased CPC by 51%, decreased bounce rate by 7%, increased pages per session by 195%, and increased average session duration by 36%.



## Out of home (OOH)

- OOH placement in Portland included one billboard across the street from Powell's Books and six Trimet MAX wraps featuring the John Day River and the Three Sisters.
- Both placements have effectively doubled their value with bonus days<sup>1</sup>, totaling over \$93,000 in added value.

## Key Takeaways:

- Paid Media
  - We recognize the importance of continual optimization and conducted a mid-campaign review. From this review, we saw Sojern's great performance and reallocated funds to expand upon this success.
  - OTAs remain a vital component to drive bookings during our campaigns.
  - We are exploring opportunities to use the OTAs in a year-round/always-on capacity.
  - Despite a lack of media spend, Los Angeles continued to rise in both Adara's and Sojern's origin market rankings.
- Paid Search
  - Allowing for more real-time optimizations versus pre-determined regional buckets allowed us to be more competitive in generating cheaper clicks.
  - Competition for seasonal keywords is high during the winter, especially for ski, snowboard and mountain keywords.
  - Coast related keywords perform very well in winter even though it isn't a high traffic time for the region.

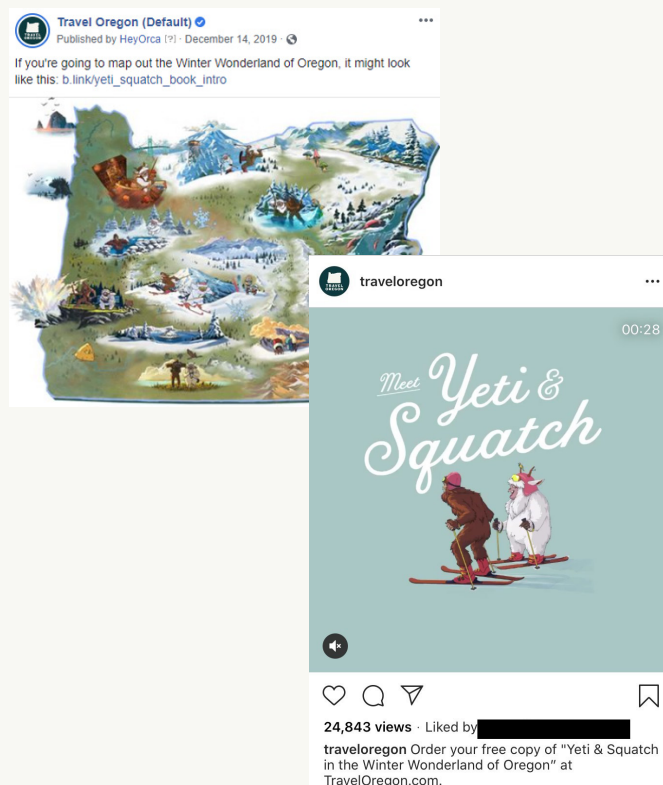
## Social

As the Yeti and Squatch story unfolded, we used Facebook, Instagram and Twitter to roll out weekly content to engage fans and connect them to traveloregon.com.

The social media goal was to leverage the inspiration of Yeti and Squatch's trip to activate our audience and immerse them in a range of things and places they could experience in Oregon. We used the following tactics to meet our goal:

## Awareness Ads

- Still illustrations were released each week to represent each of the seven regions of Oregon on Facebook, Instagram, Instagram stories and Twitter. They also included the interactive panoramic versions on Facebook, GIPHY stickers and the map illustration.
- Key Performance Indicator (KPI): engagement within channel.
- Result: 21 million impressions with a CPM of \$3.13; this was below our target of \$5. Most significantly, these units generated more impressions and a lower cost than the previous fall campaign (17.5 million and \$3.71, respectively).



## Video Ads

- These consisted of weekly videos showcasing what can be experienced in each region in the winter, as well as trailers for the Yeti and Squatch book. The videos ran across Facebook, Instagram and Twitter.
- KPI: video views within the channel.
- Result: For the video units, the final cost per view (CPV) of \$0.016 was below our target of \$0.03. On average, across the 2 milion views, people watched the videos for an 81% completion rate, which was higher than the average rate of 67.7% across other videos we've published.

<sup>1</sup> Bonus days are days are additional days the ads remain up that we did not pay for.





- Click Ads
  - These directed people to book chapters, regional winter trips, the book order form, digital download form, information on where to find posters, book tour events and select Spanish language content across Facebook, Instagram and Twitter.
  - KPI: clicks to traveloregon.com.
  - Result: We garnered 163,698 clicks to the winter regional pages, trip ideas and other promotional content. The final CPC of \$0.40, was well below our target of \$0.51. In addition, the number of clicks surpassed our target of 129,412 by more than 20%.
  - The Spanish translations of regional winter itineraries proved to be effective, with the [Willamette Valley piece](#) ranking a CPC of \$0.09 (well below the goal of \$0.51 CPC).

#### Breakdown of Results by Ad Unit:

Ad Unit	Spend	Goal	Achieved	Total
Awareness	\$66,235.08	\$5 CPM	\$3.13 CPM	21.22 million impressions
Video (views)	\$34,942.41	\$0.03 CPV	\$0.016 CPV	2.2 million views
Traffic (clicks)	\$65,588.34	\$0.51	\$0.40	163,698 clicks

#### Key Takeaways:

- During launch week the audience needed more guidance to show that the illustrations were part of a greater storyline. Our mixed media approach to unveil the weekly content educated our audience on this campaign and allowed us to exceed our campaign KPIs.

- The illustrations of the OSE campaign were a fan favorite, and the posters will be an enduring memento of the campaign. Going forward, it's important to remember that utilizing physical items such as posters, postcards or patches is still a powerful tool to ensure the longevity of the effort and connect with audiences.
- People of all ages loved the Yeti and Squatch book. Many shared the moment they held the book for the first time and showed excitement for obtaining the campaign posters.



- Willamette Valley's Terwilliger Hot Springs creative (week four), was a top performer in terms of awareness, video views and clicks. This, together with comments on the high use of hot springs locations in Oregon, shows that our audience has an interest in both wellness and the sustainability of these locations.
- The top performing videos across all channels were the book trailers. On Facebook, the Birding in Southern Oregon video had the highest view through rate of 56%.
- Localized content garners high engagement from our Spanish audience and many share their enthusiasm by tagging family or partners. The most common question asked was: "Where is this?", which provides great community management opportunities for deeper engagement from Travel Oregon.

#### Book Distribution

To drive email subscriptions, we made 1,000 copies of the Yeti and Squatch book available for pre-order. Within the first week, we had 660 pre-orders, so we expanded the number of available books to 2,000. Books were available for pre-order from campaign launch through the end of November with a total of 1,947 requests fulfilled for the printed copy of the book.



## Welcome Centers

The Welcome Centers distributed Yeti and Squatch books, posters, stickers and an illustrated winter activity tear-off map to visitors. Visitors also had the opportunity to take photos with the Yeti and Squatch cut-out. Welcome Center staff reported the campaign collateral increased visitation and awareness of their locations, as visitors showed up seeking out the coveted collectibles.



## Communications/Public Relations

The Communications team influenced 35 stories with a circulation of 40.2 million and an average story score of 8.5/10 for the fall campaign. Comparatively, last fall's campaign garnered 62 stories, a circulation of 61 million, and an average story score of 9.2. We anticipated this year's numbers to be lower as coverage of a campaign generally declines as the campaign ages.

## Yeti and Squatch Book Tour

To raise additional awareness and media coverage of the Yeti and Squatch book, the Communications team executed nine book reading events around the state with local "celebrity" readers at bookstores and libraries in all seven regions.

Stops along the tour included Powell's City of Books (Portland Region), North American Bigfoot Center, (Hood/Gorge), Klindt's Booksellers (Hood/Gorge), TreeHouse Books (Southern), Betty's Books (Eastern), The Book Bin (Willamette Valley), Roundabout Books (Central), Siuslaw Public Library (Coast) and Curry Public Library (Coast).



## Book Tour Key Learnings:

- The readings averaged around 50 people per event. Powell's and the Bigfoot Center had the most attendance at around 100 each.
- The PR team created a printed "most, best, exaggerated" map playing off the "exaggerated" part of Only Slightly Exaggerated. The map was in high demand at the signing tables and helped expand the "what to do" content.
- Many people asked who wrote/illustrated the book. For future projects, giving credit to who created it would be helpful to include.
- Attendees responded favorably to multilingual versions of the book (English and Spanish). Many wanted copies for their school library.
  - There are two final Yeti and Squatch reading events planned at the Hillsboro and Woodburn Public Libraries at the end of February. Roxy de la Torre, a bilingual multimedia journalist, presenter and producer, will be the guest reader, reading the book to attendees in Spanish. Spanish language copies of the book will be available at the events.

## Overall PR Key Learnings:

- The independent bookstore angle was celebrated by media in print, digital and broadcast outlets. The theme allowed us to pitch outlets we normally don't work with, such as Literary Arts.
- Cheryl Strayed reading the book at the Powell's kick-off was a big news draw. The event and book were featured on the cover of The Oregonian's "Books" section (print and digital).
- Most media coverage was about the statewide tour, illuminating the larger story of the campaign's impact across the state.





## SPRING 2020 MARKETING CAMPAIGN UPDATE

For the last two years, OSE has been an extremely successful campaign. As the marketing team reviewed the brief for FY 20/21, we evaluated if we should continue this work and determined it's time to evolve for the following key reasons:

- Our objectives have broadened.  
Strengthening shoulder season/year-round overnight visitation necessitates that we consider new creative ideas and campaign structure that will inspire travelers to visit all over Oregon, all year.
- We need to continue to innovate.  
OSE was surprising and attention-grabbing when it launched because of its unique use of animation for a travel/tourism ad. A third year of this style won't garner the same response we've seen in the past.
- The copycats are coming.  
While it may not be a 1:1 copy, just like we saw with the 7 Wonders campaign, the copycats are on their way. We need to continue to be one step ahead of the category and competition.

The team is currently exploring a new campaign that works for all seven regions throughout the entire year. We need a campaign idea that captures a universal truth about Oregon, true for any location, activity, or season. This work is in-depth and involves a multitude of partners, and it needs time to develop.

In the meantime, we have a unique opportunity to take OSE to Los Angeles in spring of 2020. We will utilize the 2018 OSE creative (the original :90s video from launch) and target the world-class creative in L.A. This is a market we've been wanting to go into for a long time, and we believe this is the perfect time. We chose L.A. for the following reasons:

- L.A. has consistently been one of Oregon's top origin markets. According to Adara, in spring of 2018, L.A. was 10th in overall Oregon bookings. By spring of 2019, it was 6th.
- Travelers from L.A. tend to book longer trips and spend more money while they're in Oregon. They stay an average of six days and spend \$205 a day (\$1269 per trip).<sup>2</sup>

We will use our current creative in the L.A. market, saving our production budget for new campaign work. We will not put paid media behind the OSE creative in L.A.

We are also working to determine the right balance of budget to maintain a presence in our traditional markets (Seattle, Portland, San Francisco and Boise) while focusing enough of the budget to make a strong impact in L.A. We will share more information on spring at the February commission meeting.

## MURALS

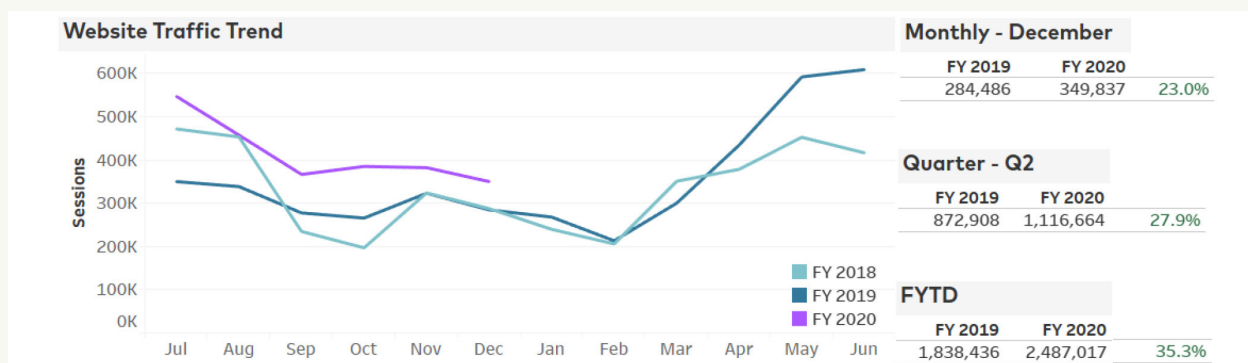
On October 25, the eighth OSE mural was unveiled with a ribbon-cutting ceremony in the city of Gold Beach. The mural, which features a coastal scene from the spring 2019 OSE campaign, was created in partnership with the Oregon Coast Visitors Association (OCVA) and Forest For The Trees, a nonprofit organization dedicated to the creation of contemporary public art.



<sup>2</sup> For comparison, here are other markets: San Francisco – 4.5 nights, \$885 spend per trip; Seattle – 3.4 nights \$595 spend per trip; Boise – 4.2 nights, \$137 spend per trip; Portland - 2.7 nights, \$468 spend per trip



## DIGITAL CONSUMER PLATFORMS

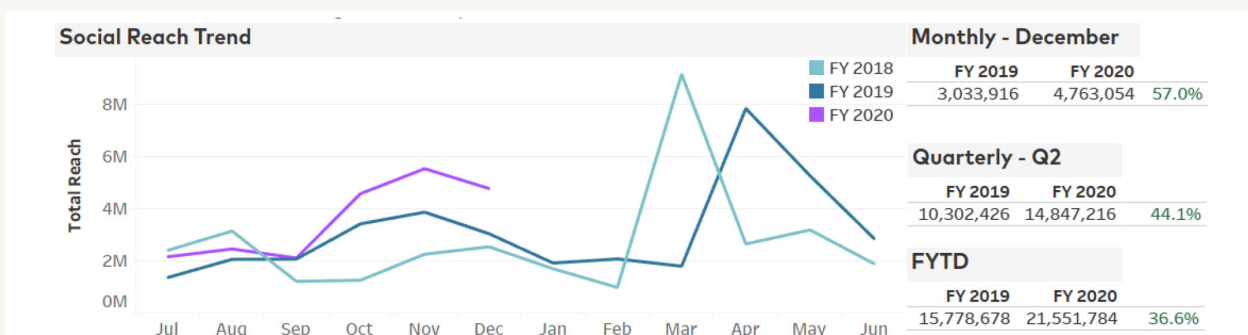


The fall campaign helped boost traffic to traveloregon.com and resulted in traffic being up 27.9% in Q2 compared to the same period last year (see campaign section for full report). This was slightly (5.35%) under our quarterly goal of 1,179,195 sessions. Since we were up 23% on last quarter's goal, we're still in a good position to hit our annual goal of 5.3 million sessions by the end of June.

Organic search continued to be the largest driver of traffic by volume (up 42% over the same period last year), and traffic from across many sources (social, paid campaign efforts, referral<sup>3</sup>) was up compared to the same period last year.

A total of 25,343 unique keywords drove traffic to traveloregon.com; this was approximately 10% more than a year ago. The team continued to improve the discovery of the site via search both from a structural and content standpoint, including monthly event roundups, more locals guides and seasonal/holiday content.

Overall social media reach for the quarter was up 44.1% with engagement across Facebook at 0.18%, Instagram at 5.81% and Twitter at 2.34%. These numbers were within reach of our FY19/20 goals of .25%, 6% and 3%, respectively. For Q2, social drove 240,246 sessions, making it the second largest traffic source for traveloregon.com after search (both organic and paid). This was up slightly (0.35%) compared to the same period last year.



<sup>3</sup> Referral traffic: Consumers who click on a traveloregon.com link from another website.



## Content highlights:

- To boost visitation during off-peak season, especially to gap-area destinations, we produced three winter itineraries for each region. Dispersion efforts included [local's picks](#) and [holiday events](#). Pieces showcasing lodging in [off-the-grid places](#) and [winter wine country](#) were also popular. Stories promoting [wellness](#), particularly in [nature](#) and [detoxing](#), encouraged off-the-beaten-path discovery while [Native American history](#) brought depth to our storytelling.
- As expected, seasonal and timely content performed well on our social channels; this quarter, the top performing posts across our platforms included [fall foliage](#), [whale watching on the coast](#), winter hot springs and [cozy winter cabin getaways](#).
- Instagram stories continued to drive engagement and clicks to traveloregon.com. This quarter we published 59 stories with an average retention-rate of 74% to support the campaign and always-on content. Our monthly round-up of top things to do continued to be a click driver. Other top performers included the alert about ski areas opening, the [Yeti or Squatch quiz](#) and the [Why do you love Fall in Oregon](#) quiz.
- In support of Global Sales hosting French influencers [Mountains Legacy](#) on an adventurous trip through Oregon, we coordinated a two-day Instagram takeover and coinciding web story. The social media posts featured both English and French text.



## PUBLISHING &amp; CONTENT

## Content update

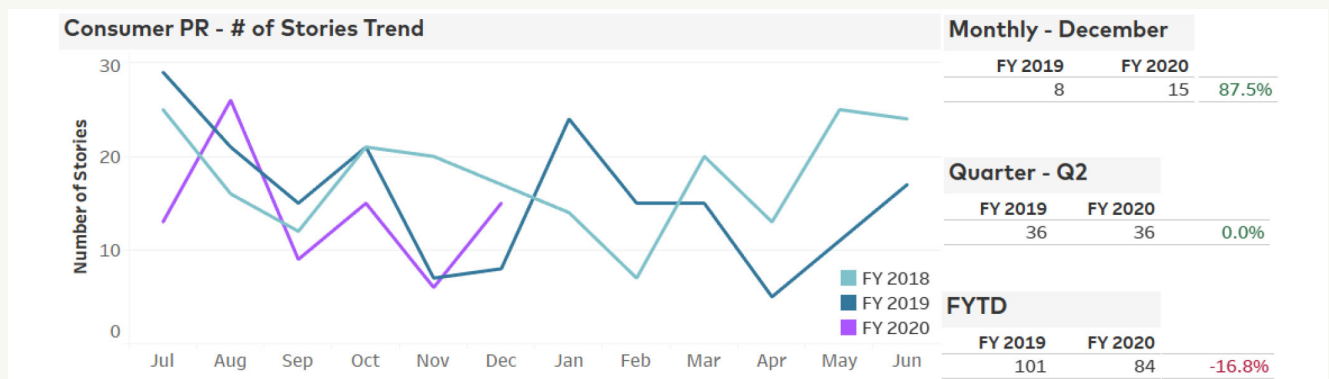
The content team produced, published and distributed 55 stories in Q2. The publishing lineup included:

- 18 news stories designed to keep Oregon top of mind with content related to a three-month booking time frame.
- Six seasonal features that took a long-form approach to storytelling, prompting an emotional desire to travel to Oregon.
- 11 special project stories to support partner requests (i.e. Oregon Wines Fly Free) and/or specific events, including five sponsored stories and three Ski Oregon articles.
- 37 refreshed and 15 new stories in support of the fall campaign, including seven region-specific itinerary stories and seven Spanish-language translations.

Winter seasonal features included [snowshoe adventures](#) statewide, [wellness retreats](#) in Central Oregon, [winter camping tips](#), locals' picks in [Mt. Hood and the Gorge](#), [movie locations and events](#), and a video about [Hart Mountain National Antelope Refuge](#).

## Oregon Mountain Bike Destinations

We promoted [Oregon mountain bike destinations](#) on Facebook and Instagram to support product development work by Destination Development, testing ads against two versions of the Active Adventurer demographic. This will lay the framework for hyper-targeted ads in spring to influence experienced mountain bikers to take trips to Oregon and inspire newcomers to the sport.





## CONSUMER COMMUNICATIONS

Q2 resulted in excellent top-tier media coverage (online and print) in Seattle Magazine, Los Angeles Times, Sunset, Outside and Huffington Post, among others. In total, we garnered 36 stories with a circulation of 266 million and an average story score of 7.8/10. Our goals for FY 19/20 are 182 stories and a circulation of 899 million, and we're at 46% and 69%, respectively. In comparison, Q2 of FY18/19 saw 29 stories, 84.6 million circulation and average story score of 8.5/10. This quarter, we were above YOY numbers in circulation and number of stories, but narrowly missed our story score goal, primarily due to the coverage in Q2 being comprised of roundup stories, which score lower than feature stories.

Please see Appendix B for Q2 consumer coverage.



### Visit McMinnville New York City Media Event (October 2019)

In early October, the Communications team supported a Visit McMinnville media event at VICE Munchies in NYC. Media attendees included the New York Times, Wall Street Journal, Travel + Leisure, Every Day with Rachael Ray, Food Network and Martha Stewart Living, to name a few. Media events like this help Travel Oregon and our partners establish new and cultivate existing relationships with top-tier national media, keeping Oregon top-of-mind when they begin story ideation. Following the event, Farideh Sadeghin, Culinary Director at Munchies, came to Oregon and visited McMinnville, Willamette Valley and the Oregon Coast. Her producer at VICE has also expressed interest in coming to Oregon to shoot footage for multiple episodes of its YouTube weekly video series.

### National Plan for Vacation Day

[National Plan For Vacation Day](#) (NPFVD) was celebrated on Tuesday, January 28. This annual campaign, spearheaded by the U.S. Travel Association, encourages people to plan their time off for the rest of the year. In support of this initiative, Travel Oregon and the Oregon Restaurant and Lodging Association

(ORLA) partnered with hotel properties around the state to offer a [20% discount](#) for anyone who booked between January 28-31 for a future stay. In addition, we created an [industry toolkit](#) to share with our regional partners through our industry newsletter.

Objectives:

- Raise awareness for NPFVD and the health benefits of taking vacations.
- Support hotels across the state by creating interest and demand for them during the shoulder season.
- Inspire and incentivize overnight trips with discounted hotel rates.
- Garner consumer and industry media coverage highlighting inspirational trip ideas and the partnership between Travel Oregon/ORLA and hotels across the state.

### Press Trips

On October 6-11, the Communications team hosted freelancer [Hadley Meares](#), whom we first connected with during last year's L.A./San Francisco media tour. Hadley's primary outlets include: Atlas Obscura, The History Channel Online, and LA Weekly. The trip focused on the Oregon Trail, ghost towns and unique history around the state. View her itinerary [here](#). We will share any resulting coverage in upcoming reports.

## MARKETING INSIGHTS AND VISITOR SERVICES (MIVS)

### Research

In 2019, Travel Oregon supported the Oregon Wine Board and the University of Oregon's Institute for Policy Research and Engagement (IPRE) to conduct a [survey](#) of visitors to three of Oregon's major wine regions (Rogue Valley, Umpqua Valley and Columbia Gorge).

This project was made possible partly by an Oregon Wine Country License Plate Matching Grant. The extensive intercept and online survey investigated winery visitors' sociodemographic, trip behavior, perception of each wine region and satisfaction with their experience.

The research team identified following key findings that the wine and tourism industry should consider as they work to strengthen Oregon's wine sector:

- Winery visitors often prioritize experience over wine.
- Create a more welcoming environment and offer more inclusive experiences at tasting rooms geared towards younger demographics and wine novices who may be less knowledgeable about varietals and food pairings.
- Wine complements Oregon's emerging agritourism sector.



- Oregon's wine and tourism industries benefit from collaboration.
- Continue to foster and elevate a uniquely Oregon brand.
- Focus more marketing attention on millennials.
- Winery staff can make or break a positive winery experience.

### Visitor Life Cycle Management (VLM)

In Q2 we continued our focus on getting the consumer email preference center up and running. Our goal is to have it live by the end of January.

The team also enabled secured domains for webpages hosted via Marketo which allows us to encrypt the data being passed between the user and the servers. This provides enhanced security for our subscribers.

We also finalized the design of our new email welcome series that gets triggered when a new subscriber joins a Travel Oregon newsletter. The goal of this program is to welcome new subscribers to the email program and interact with them while they are showing high engagement with Oregon. Implementation will begin as soon as the preference center is complete.

Lastly, the team finalized the design and build out of the [VLM Quiz](#), which is a BuzzFeed<sup>4</sup> inspired quiz designed to get people to share their data in exchange for customized road trip recommendations. The quiz provides an important avenue for visitors to share their bookings dates with us. Gaining booking data is one of the cruxes when determining where visitors are in the visitor lifecycle. The quiz will be connected to Marketo in Q3 after the preference center is live.

### Email

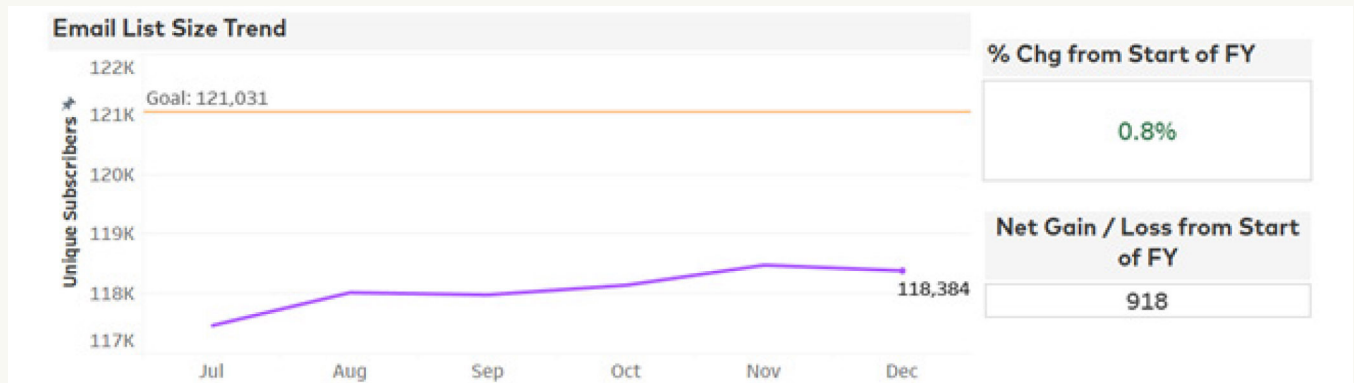
Travel Oregon's consumer email marketing programs were identified as a key initiative for FY 19/20. The email programs allow for ongoing communication with potential travelers to keep Oregon top of mind.

Total list size at the end of Q2 was 118,384, up 0.8% from the start of the year. Our goal for the fiscal is to increase the email list size by 4% by the end of June.

Looking at our newsletter lists for the quarter, the general and outdoor lists saw an overall decrease in subscribers YOY, where the culinary list grew by 166% YOY. The increase in the culinary list was largely attributed to 1,100 new subscribers from the Emerald City Adventures Sweepstakes. From an engagement standpoint, each list showed an increased open rate YOY with the culinary list leading the pack with an outstanding 31.5% open rate. The general list came in at 28% and outdoor at 29%.

Our CTR showed room for improvement. Each list was flat or down compared to the prior year. The general list was down 31% YOY. The outdoor list was flat at 15% and the culinary list was down 27% YOY. This led to a decrease in referrals to the website. The team is working to make sure we have impactful content mixed with niche content to ensure we have popular stories mixed with more unique content.

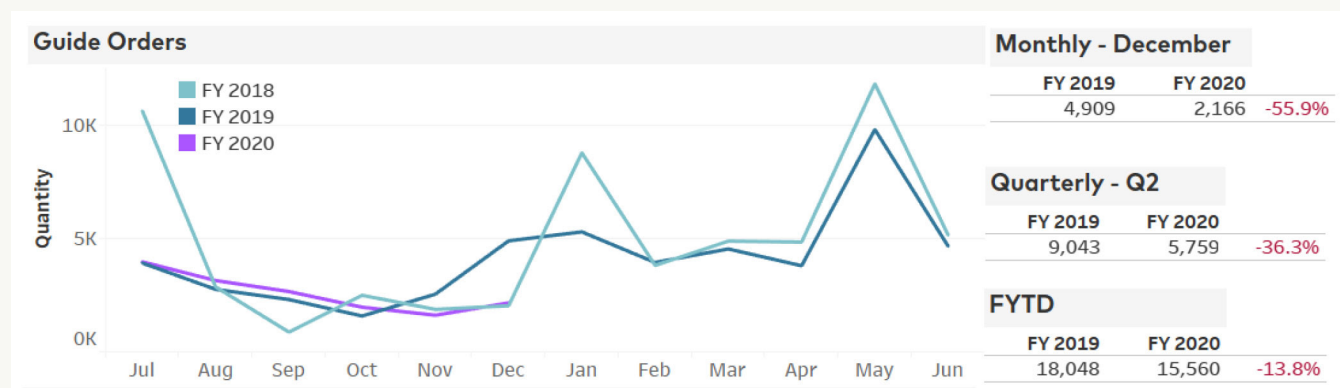
The team used the Yeti and Squatch book to drive subscribers and, while we received more than 3,000 book requests (print and digital), only 497 of them were new subscribers to our newsletter. An additional 530 were existing subscribers.<sup>5</sup> While the book was very popular, it didn't drive the number of subscribers



<sup>4</sup>BuzzFeed quizzes are designed to be short, fun, highly visual quizzes that aim to tell you something about yourself.

<sup>5</sup>We did not receive email addresses from the remaining book orders because entering an email address was not required for a book order due to legal requirements.

## Fulfillment



that we were hoping and took attention away from other email acquisition strategies like the blanket sweepstakes and visitor guide program. We'll take this as a learning into future campaigns.

Travel Oregon received 5,759 individual guide orders in Q2, representing a 36% decrease compared to Q2 of FY18/19. The dedicated email promoting guide orders was sent in December of FY18/19, boosting Q2 orders. This year, the guide promotion email was sent in January, the results of which will be reflected in Q3. Our FY 19/20 goal is to increase guide orders by 5%.

## TRADE & CONSUMER SHOWS

### Discover USA Consumer Show: Zeist, Netherlands, November 2019

BuroSix represented Travel Oregon for Visit USA's Netherlands-based consumer show, Discover USA/Canada, in Zeist. The Dutch continue to have a strong interest in travel to Oregon as a result of the popular Dutch television show "Wie is De Mol," which aired an entire season filmed in Oregon in 2017.

### NTA Travel Exchange: Fort Worth, Texas, December 8-12, 2019

Travel Oregon was a sponsor of NTA Travel Exchange in Fort Worth, Texas. Travel Exchange is NTA's annual tradeshow, which includes one-on-one scheduled meetings with domestic and Canadian group tour operators, and receptive tour operators. The conference also provides valuable networking and educational opportunities. As part of the sponsorship, Travel Oregon had a wellness-themed 10x20 booth and more than 40 confirmed one-on-one appointments. Oregon had a delegation of 13, representing several regions, lodging properties and attractions. Travel Oregon also hosted a dine-around for more than 50 tour operators

that showcased Oregon cuisine and allowed partners dedicated networking time with key clients. In a meeting during NTA, Travel Oregon learned that Collette Vacations has seen an 104% increase in bookings YOY for their Oregon and California tour.

### American Bus Association (ABA) Marketplace: Omaha, Nebraska, January 10-15, 2020

ABA's Annual Meeting and Marketplace is a business-to-business sales platform connecting Oregon sellers/suppliers with buyers from 800 qualified tour and motor coach operators via pre-scheduled appointments and networking opportunities. Travel Oregon co-sponsored a 10x20 booth with Travel Portland and eight additional Oregon delegates. While attending the show, Travel Oregon took appointments with more than 30 tour operators. This platform provides the opportunity for maintaining current relationships and developing new business opportunities. For example, Terrapin Tours, a domestic tour operator out of New Hampshire, is developing a new Pacific Northwest tour for 2021 with the help of Travel Oregon.

## SALES MISSIONS

### German Sales Mission: October 27-30, 2019

Travel Oregon organized a sales mission in Germany including delegates from: Travel Portland, Tualatin Valley, OCVA and the Greater Newport Chamber of Commerce. The mission included trade meetings and trainings in five German cities beginning with a Visit USA Germany agent training trade show where more than 100 top agents from several agencies participated in 30-minute workshop style Oregon presentations throughout the day. As a result, one German company has already developed an Oregon itinerary for motorcycle tours for their 2020 product line-up, both online and in print.



### **Scandinavia Sales Calls: Denmark, Copenhagen, October 30-November 1, 2019**

Travel Oregon and Atlantic Link, our Scandinavian in-market office, conducted sales calls and training in several offices in Copenhagen in October. As a result, several tour operators have registered to attend Go West Summit in Portland this March.

## **MEDIA FAMS**

### **Georgia Straight: Vancouver, B.C., December 27-30, 2019**

Travel Oregon welcomed an editor from Georgia Straight, a news website in Vancouver that receives 1.7 million unique visits monthly. This journalist also has a weekly food column on CBC radio. The focus of her trip was food, wine, cooking and family travel. This visit fulfilled media strategies for Canada – visits during shoulder season and family travel – a market Travel Oregon is just starting to tap into.

### **Dreamscapes Magazine: Canada, January 20-28, 2020**

Travel Oregon was excited to welcome a prominent freelance journalist on assignment for Dreamscapes Magazine (circulation of 110,000), the travel supplement to the Globe and Mail, Canada's top daily newspaper. The Oregon feature will be a three-page story with images that will be heavily focused on food, wine, and behind-the-scenes, quirky and unique elements of Oregon. This journalist visited Portland, Eugene for the Oregon Truffle Festival, the Coast and the Willamette Valley. This is an incredible and rare opportunity for Oregon to be featured in Canada's top daily publication.

## **MEDIA EXPOSURE**

### **Michelin Green Book Travel Guide: Portland, 2019**

Travel Oregon participated in an event with Travel Portland in Paris, France for the introduction of the new Portland Michelin Green Book Travel Guide. Travel Portland has been collaborating with Michelin for five years, which led to the production of the guide for Portland, specifically. Michelin guides are famous throughout the world, but especially in the French market as the guides are a highly trusted source of travel recommendations which are chosen based on Michelin's writers' experiences in a destination. Attendees included 33 top French media and travel trade representatives, which resulted in two articles immediately after the event. Travel Oregon, who has also worked with Michelin over the years, was happy to support Travel Portland and take part in the event with media and trade clients.

### **Papersky Magazine: Japan, November 2019**

Travel Oregon hosted a press trip for the quarterly Japanese travel and lifestyle publication, Papersky Magazine, in September 2019. Delta Air Lines hosted four roundtrip tickets for the crew and America's Hub World Tours provided ground transportation for the ten-day press trip. The entire November issue focuses on Oregon and cycling throughout the state. The crew rode six themed cycle routes (Wine, Lighthouse, Doughnut, Fossils, Fishing & Lodge) in five regions, and also participated in the Crater Lake Ride the Rim. They also highlighted several Oregonians for their "Bike People in Oregon" section telling the unique stories of a variety of innovators and creative entrepreneurs in the cycling industry. This press trip presented a unique opportunity to showcase multiple regions of the state on a much deeper level to a highly engaged Japanese audience. To help promote the release of the issue, Travel Oregon co-sponsored four in-market events with Papersky. Papersky has also been promoting Oregon content and the Oregon issue on their social channels.



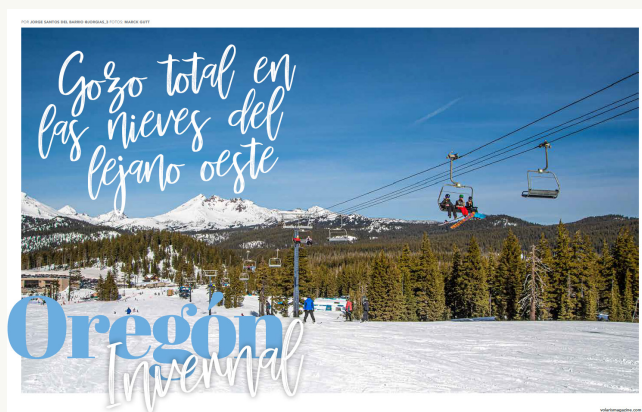
### Delta Air Lines Sky Magazine - Japan, January 2020

In partnership with the Port of Portland, Travel Oregon and WVVA, Travel Oregon hosted an editorial team from Delta Air Lines in-flight Sky magazine in November 2019. The January 2020 cover story focused on handmade Oregon products and upcycling and will rest in nearly one million seat back pockets during January and February, inspiring travelers throughout Asia to consider Oregon for their next adventure.



### V de Volaris Magazine: Mexico, January 2020

V de Volaris Magazine, Volaris' in-flight magazine, sent a journalist and photographer to visit Oregon last winter. The article was published in the January issue and highlights Central and Southern Oregon winter activities. Circulation for the publication is 44,000 and readership is 440,000+. Volaris offers nonstop service from Guadalajara to PDX, a flight that performs extremely well for the airline. In 2019, the flight carried more than 80,000 passengers, a 32% increase from 2018. The in-flight magazine was a target publication for Travel Oregon, and features shoulder season content – another goal for coverage.



### Guide2travel.ca: Canada, November 2019

Travel Oregon hosted a Canadian writer in 2019 for the Oregon Truffle Festival and a trip to Southern Oregon. While she fulfilled her assignment commitment, she recently published another travel story highlighting a 365-mile road trip in Southern Oregon. The story covers Ashland, Jacksonville, Grants Pass, Roseburg, Crater Lake National Park, Klamath Falls and wineries in the region. We have an ongoing relationship with this journalist, and she continues to produce content well after her trip. Read the article [here](#).

## TRADE FAMS

### Premier World Discovery: Domestic, December 13-15, 2019

Travel Oregon and Travel Portland assisted in hosting Premier World Discovery's annual team meeting and staff retreat/fam. Based out of Southern California, PWD brings several motor coach tours to Oregon every year and has been an important, long term client for Oregon. The 33 attendees were able to familiarize themselves with the Oregon product they sell during the winter season. Premier World Discovery's current Oregon itinerary includes 10 departures for the 2020 season.



## NEW PRODUCT

### WestJet Vacations: Canada

WestJet Vacations added Oregon hotel product for the first time in Portland, including The Jupiter, Hotel Lucia, The Heathman Hotel and Woodlark. Travel Oregon has been working closely with WestJet Vacations since the April 2019 launch of WestJet's daily, year-round service from Calgary to PDX. Their product manager will attend Go West 2020, visiting Portland for the first time.

### British Airways: London, U.K., December 2019

British Airways announced new year-round non-stop service from London to PDX in December. The service will start June 1, offering flights five days a week during summer and four during winter. A representative from British Airways Holidays visited Oregon in January and met with local hoteliers and partners. Delta Air Lines will continue to offer daily service from London to PDX April through October.

### Anderson Vacations: Canada, December 2019

Since 1993, Anderson Vacations has taken pride in surpassing the expectations of travelers with top-value group tours, custom groups, self-drive trips and independent travel options to hundreds of destinations across Canada and beyond. Travel Oregon has had a close relationship with Anderson for many years and has been working to develop new product for their clients. In winter 2019, Anderson vacations added two new self-drive Oregon tours. The six-day itinerary can be viewed [here](#) and the new 11-day itinerary [here](#).

## MARKETING PROGRAMS

### Travel Oregon In-House Training Sessions: China, December 2019

Travel Oregon's China team conducted a series of in-house trainings for Jin Jiang Travel, Qyer and Spring Travel. The 27 attendees consisted of travel product managers from two of the largest brick and mortar travel companies in China – Jin Jiang and Spring Travel—as well as marketing staff and digital content specialists from qyer.cn. Qyer is an influential, user-



generated and curated travel and tourism content platform. As a result of this training, Jin Jiang Travel is developing a west coast, family focused free and independent traveler (FIT) product that includes four nights in Oregon.

### Viva Holidays Roadshow: Australia, December 2019

Travel Oregon participated in the Viva Holidays Roadshows in Brisbane, Sydney and Melbourne, Australia. During the roadshow our in-market team hosted 16, 12-minute training sessions for 350 Viva agents. Viva Holidays is a trusted travel brand in Australia and has been in operation for 40 years. This was a first-time opportunity for Travel Oregon, leveraging awareness among travel trade professionals



### CANUSA: Germany, January 2020

This January, German tour operator, CANUSA, launched a new promotional video featuring Oregon. This was created in partnership with Travel Portland and Brand USA. The video was filmed during a fam tour in Oregon this fall and has been shared via their social channels, e-newsletter and on metro station digital screens in Hamburg, reaching as many as 500,000 passengers daily. CANUSA is a long-time Oregon partner and one of Germany's top tour operators for individual travelers to the U.S., with offices in several major German cities. Travel Oregon has collaborated with CANUSA on many successful marketing campaigns throughout their channels over the years. Last year, CANUSA sold more than 12,000 room nights in Oregon.

# SUPPORT AND EMPOWER OREGON'S TOURISM INDUSTRY

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

## OREGON TOURISM INFORMATION SYSTEM (OTIS)

### OTIS.traveloregon.com

In Q2, the team took OTIS training on the road to WVVA in Salem and Eastern Oregon Visitors Association (EOVA) in La Grande. Below are training totals for Q2:

- Total trained: 40 (21 via webinar, 19 in person)
- Total new users: 15
- Total new organizations: 5

As mentioned in the previous Strategic Plan Progress Report, on August 26, 2019, functionality launched enabling the team to report on OTIS activity. Below is the first full quarter of data:

### Platform Usage Report

Region	New Listings Created	Updated Listings	Deleted Listings
Central Oregon	52	638	58
Eastern Oregon	14	557	58
Mt. Hood & Columbia River Gorge	51	447	67
Oregon Coast	392	1,054	771
Portland Region	281	1,284	744
Southern Oregon	86	945	84
Willamette Valley	662	3,763	3,323
<b>Totals for Q2</b>	<b>1,538</b>	<b>8,688</b>	<b>5,105</b>

## COMPETITIVE GRANT PROGRAM

### Oregon Wine Country License Plates Matching Grants Applications Due February 21

Travel Oregon is currently accepting applications for the 2020-2021 Oregon Wine Country License Plates Matching Grants Program. The program awards grants to eligible applicants for projects that promote wine and/or culinary tourism. Travel Oregon administers the Oregon Wine Country License Plates Matching Grants Program, which is funded through sales of the Oregon Wine Country license plate. The grant award announcement will be made on April 22.

### Oregon Trails Coalition Funding Opportunities Webinar

Travel Oregon participated in a January 31 webinar hosted by the Oregon Trails Coalition to showcase grant opportunities for trail projects. Other funders on the panel include the Oregon Parks and Recreation Department, Oregon Department of Transportation and National Park Service. This is the third consecutive year the webinar has taken place in January, reaching an audience of more than 200. Since opening its Competitive Grants program in the fall of 2017, approximately 16% of Travel Oregon's Competitive Small and Competitive Medium Grant dollars have funded non-motorized trail development projects. Travel Oregon has awarded \$310,816 to both trail planning and development/construction.

### Oregon Main Street Network Meeting Presentation

Travel Oregon spoke at the Oregon Main Street Network Meeting on January 24. More than 40 attendees were able to learn and ask questions about Travel Oregon's Competitive Grants program. The Oregon Main Street Program works to create high-quality places and build stronger communities through preservation-based economic development. Emphasis is placed on revitalizing the downtown core.

## MEETING SERVICES

### Oregon Rural Tourism Conference

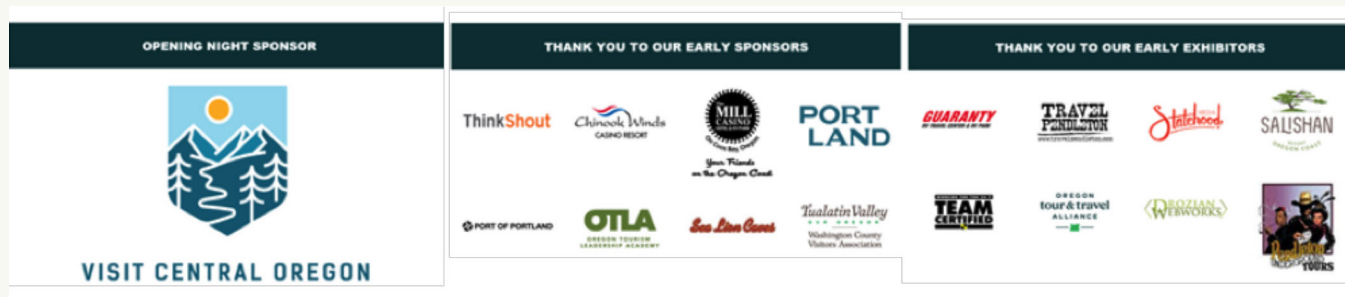
Registration is now open for the April 26-28 Oregon Rural Tourism Conference at Sunriver Resort. More information available at [www.oregonruraltourismconference.com](http://www.oregonruraltourismconference.com).

A few of the rural-focused workshop sessions being offered include:

- Champion the Value of Tourism – Advocating for the Industry
- How Can Inclusion and Equity Initiatives Benefit My Business?
- No PR? No Problem!
- Developing Amazing Visitor Experiences – From Product Development and Partnerships to Marketing and Beyond
- The International Traveler – Education & Cultural Norms

Check out all the conference workshop sessions and their descriptions [here](#).





A big thank you to our early Sponsor and Exhibitor partners who are helping make this conference affordable for our rural partners around the state:

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

## WELCOME CENTERS

### Q2

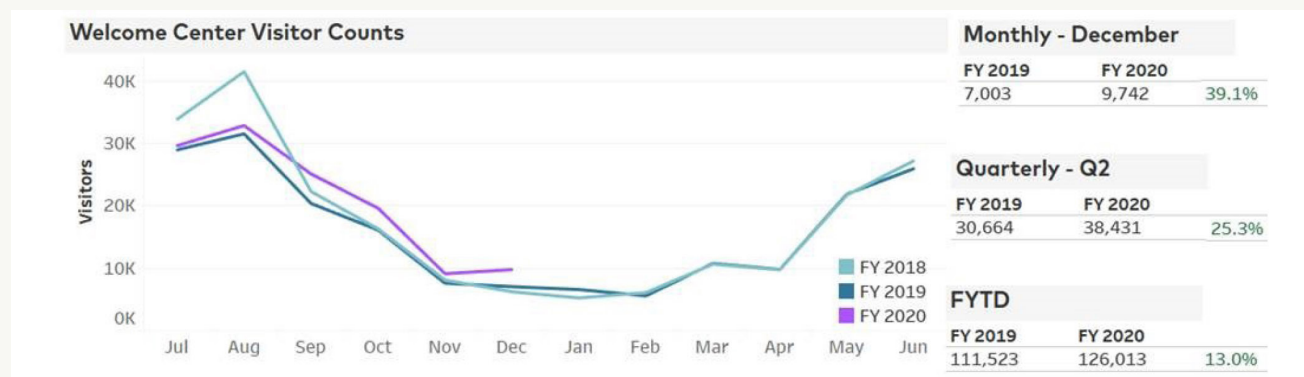
Travel Oregon Welcome Center total visitors for Q2 were up 25% compared to FY 18/19, primarily due to the addition of the new Ashland Welcome Center, now the eighth center in the program. Ashland welcomed approximately 8,000 visitors in Q2.

- The Boardman Welcome Center (SAGE Center) posted the most significant quarterly visitor increase over last year: 20% (6,231 vs. 4,942) due to an increase in special event attendance (the Harvest Festival and Winter Market) and an increase in school group tours.
- Welcome Center visitation at PDX dropped approximately 22% for the quarter (8,635 vs. 10,526).

### Training and Development

State Welcome Center staff attended an annual season debrief meeting in Klamath Falls, held at the Running Y, October 17-19, 2019. The agenda included:

- Digital guestbook tablet performance results.
- Data collection goals.
- Best practices on digital guestbook visitor engagement.
- Visitor feedback about the marketing campaign and the impact of campaign collateral.
- Overview of the fall campaign.
- Welcome center brochure program performance.
- Visitor inquiry trends and potential resources needed to support those.



Additionally, Discover Klamath presented an overview for the team about local attractions and other insights pertinent to the visitor experience. The team explored area attractions first-hand during a fam tour that included Train Mountain Railroad Museum, Klamath and Western Railroad, Kla-Mo-Ya Casino, Favell Museum, the Baldwin Hotel and the Ross Ragland Theater.

*Convene industry action networks to influence stakeholder action and increase collaboration*

## OREGON AGRITOURISM WORKING GROUP

### **Oregon Agritourism Steering Committee**

Travel Oregon has formed a new short-term Oregon Agritourism decision-making committee to help refine strategies that drive agritourism in Oregon and assess the capacity of partner organizations to advance the key priority initiatives developed in 2019 by the Agritourism Working Group. Invitations to join this committee have been extended to key partners including Association of Oregon Counties, Department of Land Conservation and Development, Oregon Dairy and Nutrition Council, Oregon Department of Agriculture, Oregon Farm Bureau and Oregon Wine Board, among others. Three meetings of this committee are planned between February and April.

## OREGON DESTINATION MANAGEMENT NETWORKS

### **Oregon South Coast Regional Tourism Network (OSCRTN)**

The OSCRTN completed their initial metrics for their 2019 network meetings. In 2019, more than 180 attended a quarterly network meeting representing 105 organizations throughout Curry, Coos and coastal Douglas Counties.

OSCRTN core team member, Marie Simonds, was promoted to Executive Director of the Wild Rivers Coast Alliance, the philanthropic grant making department of Bandon Dunes Golf Course. Marie was a founding steering committee member of both the Southern Oregon Coast and Wild Rivers Coast Tourism Studios and has been actively supporting action team projects since the studios concluded.

### **Polk County Tourism Alliance**

The Polk County Tourism Alliance, in collaboration with Travel Salem, hired Kaitlyn Cook as their new Destination Development Manager to support the Polk County area in achieving their 15-year vision and project priorities stemming from the Polk County Rural Tourism Studio. Her initial projects areas include enhancing culinary and agritourism, outdoor recreation and sub-regional marketing. Kaitlyn is a former Resource Assistance for Rural Environments (RARE) participant who served with the City of Pendleton around city planning and affordable housing. Travel Oregon will co-fund Kaitlyn's position with Travel Salem and the communities of Dallas, Monmouth and Independence.

## OREGON TOURISM STUDIO ACTION TEAM PROGRESS

### **Clackamas River Recreation Studio**

We Love Clean Rivers will be awarded an Oregon Tourism Studio grant to lead the River Ambassador Action Team with support from Oregon's Mt. Hood Territory. This action team will deploy river ambassadors to five strategic put-in locations along the river during the 2020 peak recreation season. Ambassadors will inform users of stewardship and safety best practices and highlight the abundance of recreation services around the Clackamas River. With leadership in place and added capacity, the action team has also secured \$25,000 from Clackamas County's Tourism Development grant program to support the development of this program.

## CAPACITY BUILDING IN OREGON TOURISM STUDIO REGIONS

### **Oregon Rural Tourism Conference Sponsorships Awarded**

Travel Oregon's Destination Development team allotted \$10,000 to support tourism development efforts across the state by awarding scholarships to attend the Oregon Rural Tourism Conference. The focus of these scholarships is centered around network managers, Oregon Food Trail leaders, tourism-focused RARE placements and active Oregon Tourism Studio steering committee leads. With this support, we aim to empower, educate and inspire leaders through resource sharing, community building and networking opportunities that strengthen Oregon's rural tourism industry.



# CHAMPION THE VALUE OF TOURISM

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

## REGIONAL COOPERATIVE TOURISM PROGRAM

### RCTP Internal Dashboard Update

RCTP developed an additional dashboard for internal Travel Oregon departmental use. This interactive platform allows for Travel Oregon teams to explore 2019-2021 regional plans and their associated investments.

This tool was developed to empower staff with the information they need to leverage regional investments and more generally, be informed on programming. Currently, the platform is for internal use only, but we may extend this offering to RDMO partners in the future.

- The new dashboard can be viewed [here](#).
  - Please utilize the “Introduction & Table of Contents” tab in order to get yourself acquainted with the system.

### RCTP Investments - Regional Highlights

#### Central Oregon – Regional Mural Installations

- Visit Central Oregon is working with stakeholders to develop a series of murals. Murals are currently slated for Madras and Warm Springs.

#### Eastern Oregon – Eastern Oregon Regional Grant Fund

- Number of Applications: 43
- Total Amount Requested: \$322,202.40
- Next Steps: EOVA to allocate \$81,850 through a review committee process to occur in January.

#### Hood-Gorge – Strategic Investment Fund

- Number of Applications: 9
- Total Amount Requested: \$119,307
- Next Steps: Hood-Gorge to complete call-backs to applicants with follow up questions and requests for more information. Once complete, final review and confirmation of disbursement amounts set to occur.

#### Oregon Coast – Live Culture Coast

- The Oregon Coast Visitors Association (OCVA) assisted with the funding and execution of [Live Culture Coast](#), a ten-day event on the Southern Oregon Coast in October that focused experiences in art, culture and food.
  - Attendance:
    - 512 tickets sold
  - Reach:
    - Social Media: 789,500 impressions
    - LCC website: 20,000 page views
    - Print distribution: 67,000
    - Radio: 224
    - Broadcast: 268,00 impressions delivered

#### Portland Region – Oregon Tourism Leadership Academy (OTLA) Scholarships

- Six tourism leaders have been accepted from the Portland Region into OTLA, which is set to kick-off following the Oregon Rural Tourism Conference. The Portland Region will utilize RCTP funding to subsidize participation in the program.

#### Southern Oregon – Strategic Investment Fund

- Oregon Outback Dark Skies Project
  - The Southern Oregon region is investing in the development of an Oregon Outback Dark Sky Network (ODSN). The current goal of this network to continue connecting with folks in Lake County and garnering support and awareness around the Dark Skies program. This cohort is ultimately working towards an International Dark-Sky Association (IDA) official sanctuary designation.
  - More information can be found [here](#).

#### Willamette Valley – RARE Update

- Allocated funding towards a Willamette Valley Tourism RARE – work includes Willamette Water Trail, Oregon Food Trails, and bike route curation projects.
  - Workshops for the Willamette River Trail begin at the end of April.
  - Two food trails are set to launch: Mid-Willamette Valley and Great Oaks Food Trails.
  - Survey being developed around the Bike Friendly Business program. Assessing effectiveness in the Willamette Valley and cyclist usage.

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

## INDUSTRY COMMUNICATIONS

We had a strong Q2 with 141 stories, with a circulation sum of 243 million and an average story score of 7.8/10. These numbers were down compared to Q2 FY 18/19 which saw 370 stories, a circulation of 470 million and average story score of 8.3/10. We anticipated this change as last year's Q2 numbers were elevated due to the fall campaign launch/Oregon Mural Trail and Capitol Christmas Tree. Despite the decrease, this year's Q2 numbers were strong against our FY 19/20 goals of 254 stories and 201 million in circulation (we are at 86% and 65%, respectively). Influenced coverage included the Alexa Wine Quiz, Oregon21 and the launch of the Only Slightly Exaggerated Yeti and Squatch campaign.

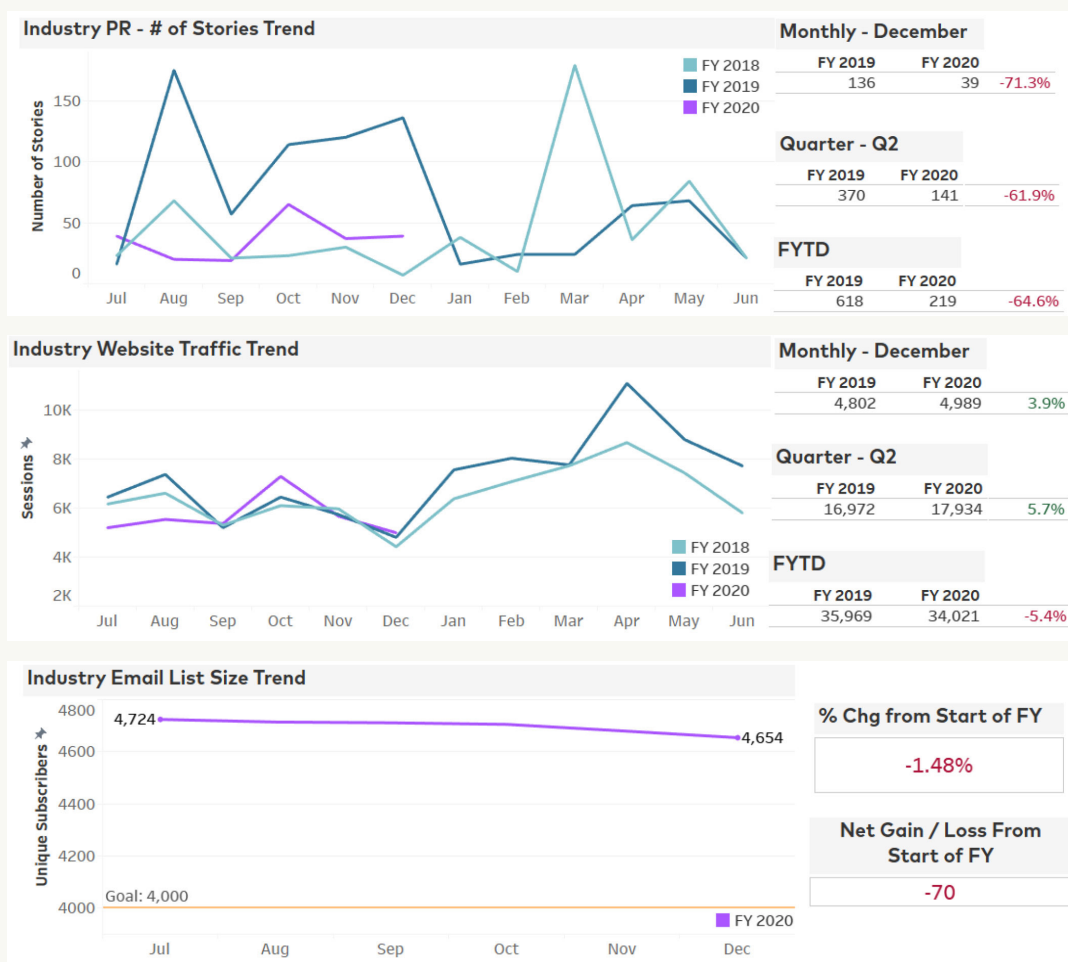
Please see Appendix B for Q2 industry coverage.

### Q2

In Q2 we saw a 5.4% decrease in traffic to industry.traveloregon.com compared to Q2 in FY 18/19. The slight decrease is likely due to the new site launch in June 2019, coinciding with Google search functionality. We expect to see this level out over time.

YoY - All Users	2018 Q2	2019 Q2	Change
Number of sessions	17,934	16,972	-5.4%
Number of users	10,816	10,691	-1.2%
Pageviews	40,683	42,473	4.4%
Pages/Session	2.40	2.37	-1.2%
Avg Session Duration	2:07	2:09	1.6%
% New Sessions	73.6%	79.0%	7.4%

The general industry newsletter subscriber list decreased by 1.48% from the start of Q1. We did, however, see 86 new subscribers. The negative number reflects a combination of error and opt-out contacts. We continue to see a high open rate with our industry newsletters; the open rate for Q2 was 28%-34% based on newsletter type. Content that receives the highest readership is typically grant related or opportunities that present a specific call-to-action relevant to industry partners statewide.





# RUN AN EFFECTIVE BUSINESS

## FINANCIALS

### 2019/20 FYTD

The commission adopted budget anticipates transient lodging tax (TLT) income for FY 19/20 of \$41,300,000. TLT income fiscal year-to-date through December 31, 2019 is \$25,415,203, or 61.5% of TLT budget. Fiscal year-to-date agency expenses, grants and RCTP disbursements, and future programming reserves total \$26,816,777, or 44.5% of budget; programmatic and payroll expenses are well within budget.

Proceeds from Wine Country License Plate sales fiscal year-to-date through December 31, 2019 total \$221,240, averaging \$36,873 per month (six deposits). \$85,125 in grants and \$22,761 in tourism promotion funding has been distributed this fiscal year-to-date.

### Recruiting – Integrated Marketing

We're happy to announce that the role of Integrated Marketing Content Editor has been filled by Kayla Brock. Kayla is a graduate of the Richmond American University in London (Journalism) and brings more than four years of editorial and broadcasting experience of covering news, arts and culture and travel. Most recently, she was a multi-media producer at FOX 12 Oregon (KPTV) where she did everything from managing the national feed of the Congressional impeachment proceedings to doing sideline Instagram stories at Trailblazer games. In her spare time, she is a photography enthusiast and has done work as a portrait photographer and as an AirBnB photo tour host.

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

### IT Platform and Resources Modifications

Travel Oregon has developed an IT Task Force consisting of agency staff members and a consultant with expertise in the field of IT infrastructure management and facilitation that will lead the discussion and discovery phase of identifying agency needs. Priority areas identified to improve efficiency include project management, CRM, collaboration tools to help strengthen communication within the industry and the agency's daily work, teleconferencing and improvements to the agency's intranet site. The task force will convene several times beginning in February and will continue to meet through July.

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

### Leadership Development

In addition to updates being considered for various policies in the Travel Oregon Employee Handbook, also on deck is the creation of a specific manager/supervisor handbook to reinforce expectations and clarify policy and procedures related to managing staff. This handbook creation is being done in concert with one of the trainers for Oregon statewide "foundations" management training and will take place in the second half of 2020. This effort ties together with educational trainings that will align us more closely with DAS leadership standards.

### Collaboration Through Candid Conversations with Scott Crabtree

As a follow-up to our Culture Summit trainings in November 2019, HR continues to execute staff development opportunities that build upon the themes of the summit and utilize our Community Agreements to navigate difficult conversations. This workshop, led by Scott Crabtree of Happy Brain Science, will emphasize how a healthy mix of assertion and cooperation leads to true collaboration.

### Wellness Committee Launch

Travel Oregon has convened an internal wellness committee to finalize and support the execution of our wellness plan. Key areas of focus will include policies, stress management, nutrition, tobacco-cessation, physical activity and finances.

*Establish cross-functional strategies in alignment with state and agency values to improve interdepartmental communication, workflows, productivity and outcomes*

To support this initiative, we convened our directors and program managers in August and December 2019 to better understand their cross-functional needs and thoughts to improve interdepartmental communication, workflows, productivity and outcomes. This groups ask was for the agency to evolve our strategic planning, work planning and budgeting at both the executive level and the department/studio level to better support existing agency timelines and provide clearer agency focus and budget narratives that support the work. As a

result, we convened an additional set of meetings with a small internal cross-functional team to draft an updated strategic planning process outline and timeline as we head into planning for the 2021-2023 biennium, as well as a process outline for standardized work-planning and budgeting. Major components of the process outline and timeline for future strategic/work planning include:

- Extending the core elements of priority initiatives of the 2019-2021 strategic plan into 2021-2023 to allow for more focused interdepartmental planning at the executive level.
- Providing time to operationalize the plan and set clear two-year outcomes to support interdepartmental productivity and indicators to better track deliverables.
- Standardizing department and studio-level work planning and budgeting to better support interdepartmental communication and workflows.

The executive team evaluated the future strategic/work planning process, provided refinement and approved the major components and timeline in mid-January.

## UPCOMING INDUSTRY EVENTS

### February

- February 28 – Conversation with Funders

Travel Oregon will be participating with the Oregon Cultural Trust, Oregon Arts Commission, Oregon Heritage Commission and Oregon Humanities in sharing grant opportunities with potential applicants during round table conversations across the state. Participation of funders has increased this year with Oregon Parks and Recreation Department and the Oregon Community Foundation planning to attend each event. Travel Oregon has also invited the Regional Destination Management Organizations to participate.

### March

- March 9 – North Coast Tourism Management Network Community Forum

This forum will be the community's first introduction to North Coast Tourism Management Network efforts. The agenda will include updates and next steps related to the North Coast Tourism Studio action team projects. Presentations will focus on North Coast tourism and opportunities for engagement to leverage momentum around complex solutions to tourism management challenges.

- March 10 (Pendleton), March 12 (Bend) – Conversations with Funders

Travel Oregon will be participating with the Oregon Cultural Trust, Oregon Arts Commission, Oregon Heritage Commission and Oregon Humanities in sharing grant opportunities with potential applicants during round table conversations across the state. Participation

of funders has increased this year with Oregon Parks and Recreation Department and the Oregon Community Foundation planning to attend each event. Travel Oregon has also invited the Regional Destination Management Organizations to participate.

- March 24-27 – Go West Summit

Go West Summit will take place in Portland in March. In addition to hosting the opening event, Travel Oregon will host four pre-conference and two post-conference fam tours, in partnership with all seven regions, to further showcase Oregon as a premier destination. Go West Summit provides international and U.S. based receptive tour operators a venue to meet with the highest quality suppliers from the west to generate tourism business into the western United States. The summit is regarded by participating tourism and travel professionals as a premier conference as well as an efficient and economical mechanism for booking international business.

### April

- April 14-15 and 21-23 – Willamette River Recreation Studio Community

Travel Oregon, in partnership with WVVA and a local steering committee, will deliver a recreation tourism development workshop series to the Willamette River area, including river-adjacent communities from Springfield to Milwaukie.

Initially, Travel Oregon will deliver community input sessions which will include an overview of river recreation with a focus on world-class case studies, innovative programs and an information gathering component to understand needs, gaps and opportunities in specific segments along the river.

### May

- May 5-7 – AdventureELEVATE

AdventureELEVATE is an annual North American-based, two-day intensive educational and networking conference that brings together the adventure travel industry. The conference is organized by the Adventure Travel Trade Association, which runs more than a dozen conferences and events worldwide. This year, the conference will be held in Eugene, Oregon. 250 conference attendees are expected, representing tour operators, guides, travel writers and tourism agencies. Travel Oregon is hosting two fam tours prior to the conference and the closing night event.

- May 19 – Willamette River Recreation Studio Region-Wide Summit

The summit will showcase draft action plan strategies developed based on feedback gathered during community input sessions, insights from the steering committee, results of a Willamette River research study and successful examples of collaborations and sustainable recreation development.



# APPENDIX A

## PAID MEDIA

### Parameters:

- Timing: 10/15/19 – 1/1/20.
- Markets: Portland, Seattle, Boise, Eugene and Bend.
- Target: The “Winter Wanderer” (adults aged 25-54 who prefer active vacations, doing new things and exploring different locations and activities throughout the winter months).
- Budget: \$909,316.

### Key Strategies:

- Inspire “Winter Wanderers” by aligning with regional partners to capture local interest and feature regional wintertime activities.
- Engage our audience with the week-by-week story of the Yeti and Squatch journey and reward active followers with the free limited-edition book.
- Drive bookings by connecting with our target audience through Online Travel Agencies (OTAs) while they are most likely to book.

## SOCIAL MEDIA

### Targeting parameters for the campaign:

- Timing: 10/15/19-12/16/19.
- Markets: Oregon and retargeted audience from OSE in Washington, western Idaho and northern California.
- Platforms: Facebook, Instagram and Twitter.

# APPENDIX B

## Earned media coverage highlights (CONSUMER)

- Seattle Magazine, [“A Roadtrip to the Oregon Coast is the Perfect Weekend Getaway.”](#) An article about road tripping the Southern Oregon Coast and inland toward Elkton.
- LA Times, [“Enjoy the outdoor lifestyle on a weekend trip to Bend, Ore.”](#) An article about things to see and do in Bend.
- Departures, [“250 Reasons to Add This Small Oregon Town to Your Travel Bucket List—Especially for Wine Lovers.”](#) An article about things to see and do and places to stay in McMinnville.
- Huffington Post, [“What’s The Difference Between All The Types Of Salt?”](#) An article about why we should pay more for artisan salt. Features Jacobsen Salt Co. Abigail Abesamis was on the pre-Feast tour to the Coast.
- Feed Me Dearly, [“We Be Feastin’”](#) An article about visits to Oregon; including the Willamette Valley and Coast (stops along the pre-Feast tour).
- 1859 Oregon’s Magazine, [“Doing It Big in The Dalles This Columbia Gorge City.”](#) An article about things to see and do in The Dalles.
- OregonLive, [“Ski season is here: Mt. Hood Meadows joins Timberline, Bachelor in daily operations.”](#) An article details the opening of the Mt. Hood ski season.
- UrbanBlissLife, [“Top 10 Best Things To Do in Cannon Beach.”](#) An article of things to see and do in Cannon Beach; stops on the pre-Feast tour.

## Earned media coverage highlights (INDUSTRY)

- Skift, [“Destination Storytelling 2020: A Guide to Telling Great Stories.”](#) A round up of impactful storytelling from DMOs; includes the Only Slightly Exaggerated campaign.
- Portland Business Journal, [“Five Things for Wednesday, including Sondland in the spotlight and Alexa’s take on Oregon wine.”](#) A roundup that features the announcement of the Alexa Oregon Wine Quiz. Mo Sherifdeen is quoted.
- MediaPost, [“Travel Oregon Experiments With Voice Search To Drive Wine Industry Awareness.”](#) An article features the announcement of the Alexa Oregon wine Quiz. Linea Gagliano is featured.
- OPB, [“More State Funding Sought As Eugene Prepares For 2021 World Track Championships.”](#) An article about the preparations for the 2021 World Track Championships.
- KATU, [“Oregon Film Trail ties film and mental health history in Salem.”](#) An article about Travel Oregon awarding a competitive grant to Oregon Film to develop the new Oregon Film Trail.
- Ashland Tidings, [“Cooking up a Southern Oregon food trail.”](#) An article about a Southern Oregon food trail workshop focusing on culinary and agritourism.
- Curry Pilot, [“Tourism: Oregon Mural Trail runs through Gold Beach.”](#) An article about the Oregon Mural Trail installation in Gold Beach and the ribbon cutting event.
- OregonLive, [“Cheryl Strayed reads Travel Oregon’s new ‘Yeti and Squatch’ storybook, and other Oregon book news.”](#) (online and print)
- Lake County Examiner, [“Lake County Round-up impresses in Vegas.”](#) An article about the Lake County Round-Up being among the delegates that traveled to Las Vegas with Travel Oregon for Cowboy Christmas.

## PRESS RELEASES

- [“Hey Alexa! Play the “Oregon Wine Quiz!”](#) Travel Oregon’s press release announcing the innovative Oregon wine quiz on the Alexa app.
- [“A Tale of Two Big-Footed Buds Discovering Winter Adventures in Oregon.”](#) Travel Oregon’s press release announcing, “Yeti & Squatch in the Winter Wonderland of Oregon.”

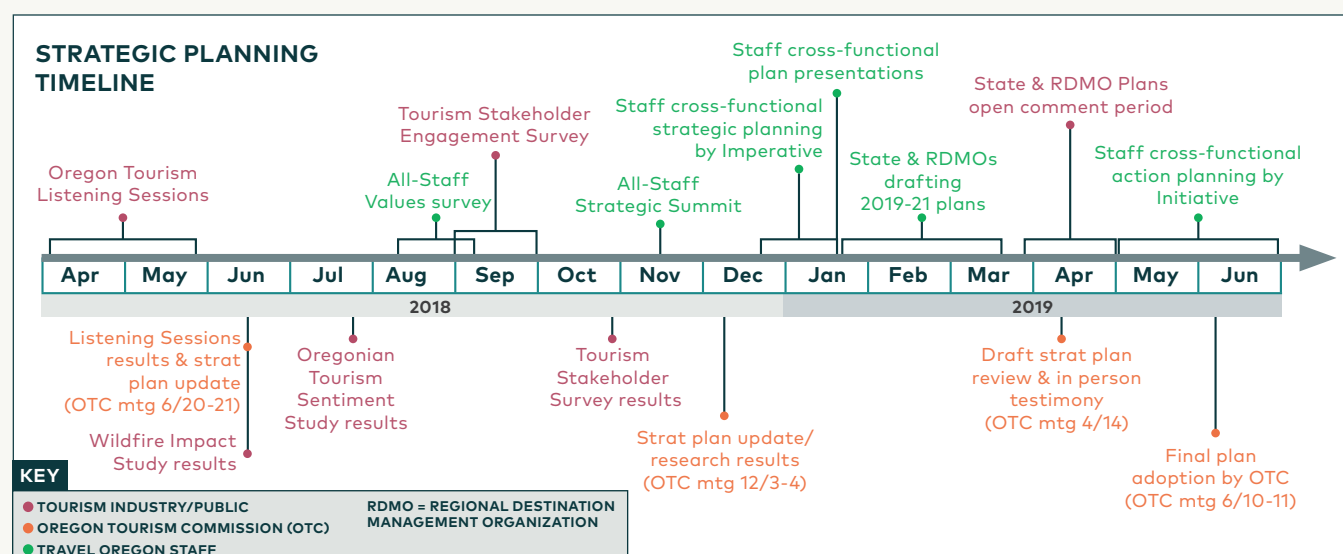


# STRATEGIC PLANNING

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

## 2019-2021 OVERVIEW

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



# RETURN ON INVESTMENT

## DASHBOARD: 2018

### TRAVEL IMPACTS SUMMARY

**Spending (YOY)**  
\$12.3B (4.2%▲)

**Employment (YOY)**  
115.4K (2.9%▲)

**Earnings (YOY)**  
\$3.6B (8.9%▲)

**Tax Receipts (YOY)**  
\$1.3B (5.8%▲)

Source: Dean Runyan Associates

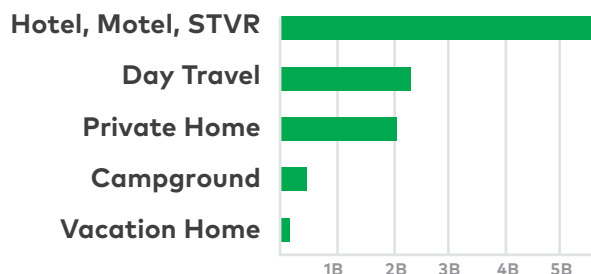
### VISITOR VOLUME & AVERAGE SPENDING

**Person Trips (YOY)**  
29.1M (1.1%▲)

**Per Person Trip (YOY)**  
\$287 (2.7%▲)

Source: Dean Runyan Associates

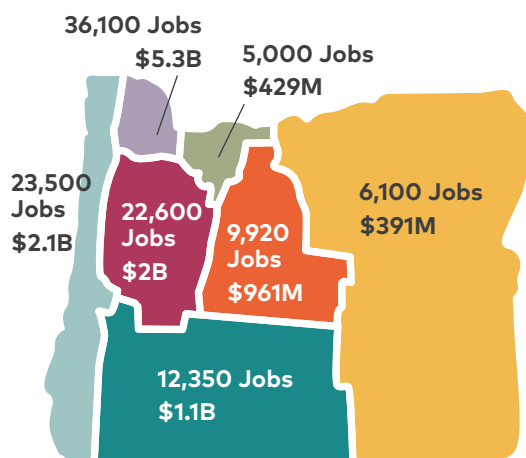
### VISITOR SPENDING BY TYPE OF LODGING



	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



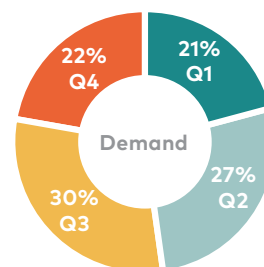
Source: Dean Runyan Associates

### LODGING TRENDS (YOY)

**Demand**  
15.9M (1.4%▲)

**Revenue**  
\$1.96B (2.3%▲)

**Occupancy**  
64.8% (-0.9%▼)



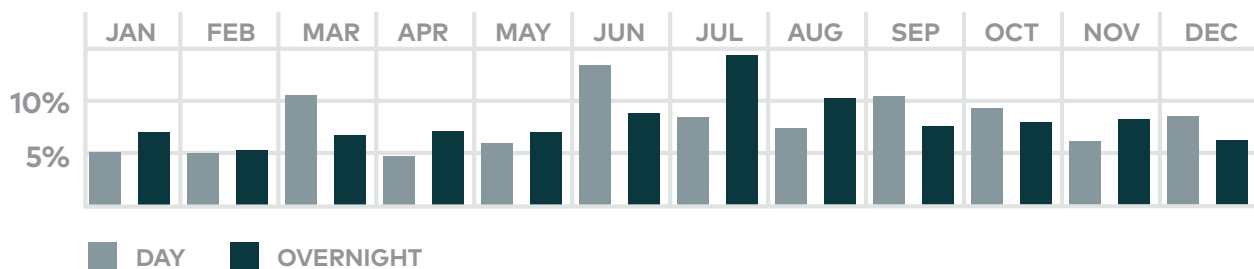
Source: STR, Inc.

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

Source: Longwoods



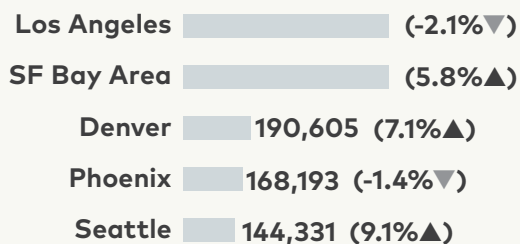
## DOMESTIC TRIPS SEASONALITY



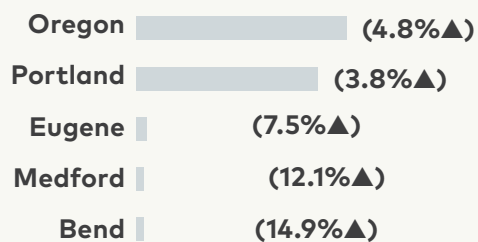
Source: Longwoods

## DOMESTIC VISITOR AIR ARRIVALS

## Top 5 Origin Markets (YOY)

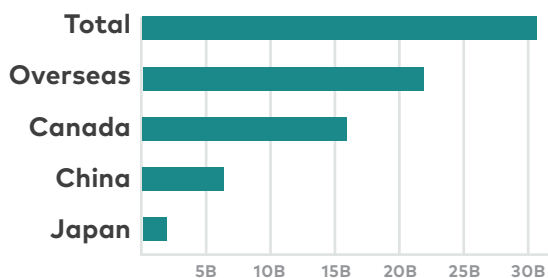


## OR Airports (YOY)



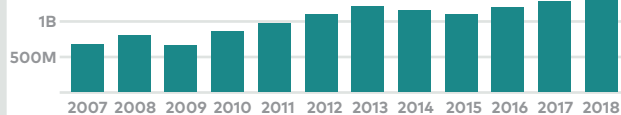
Source: U.S. Department of Transportation (O&amp;D Survey, T100), Dean Runyan Associates

## 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

# Oregon Tourism Commission

## Profit & Loss Budget vs. Actual

July 1 - December 31, 2019

	July 1 - December 31, 2019	Annual Budget	Over (Under) Budget	% of Budget
<b>Sources:</b>				
Lodging Tax Income	25,415,203	41,300,000	(15,884,797)	61.5%
Interest Income	113,601	150,000	(36,399)	75.7%
Misc. Revenue	14,057	-	14,057	100.0%
Conference/Event Revenue	14,993	100,000	(85,007)	15.0%
Welcome Center Brochure Program	26,684	40,000	(13,316)	66.7%
Grant Funds	-	-	-	0.0%
Federal Grant Funds	-	-	-	0.0%
<b>Total Budgeted Sources:</b>	<b>25,584,539</b>	<b>41,590,000</b>	<b>(16,005,461)</b>	<b>61.5%</b>
Beginning Balance - Regional	7,538,000	7,538,000	-	100.0%
Beginning Balance - Grants	4,589,138	4,589,138	-	100.0%
Beginning Balance - All other TO programs	8,838,810	8,838,810	-	100.0%
<b>Total Sources</b>	<b>46,550,487</b>	<b>62,555,948</b>	<b>(16,005,461)</b>	<b>74.4%</b>
<b>Uses:</b>				
<b>Future Programming - Statutory</b>				
Regional - future (net of administrative expense)	4,752,643	7,723,100	(2,970,457)	61.5%
Grants- future (net of administrative expense)	2,312,783	3,758,300	(1,445,517)	61.5%
<b>Total Future Programming - Statutory</b>	<b>7,065,427</b>	<b>11,481,400</b>	<b>(4,415,973)</b>	<b>61.5%</b>
<b>Other Programming &amp; Reserves</b>				
Operating Reserve (from Admin/Ops Budget)	228,500	228,500	0	100.0%
Immediate Opportunity Fund (from Admin/Ops Budget)	160,000	160,000	0	100.0%
Marketing & Sales Development (from G. Marketing Budget)	0	7,431,484	-7,431,484	0.0%
<b>Total Future and Other Programming &amp; Reserves</b>	<b>388,500</b>	<b>7,819,984</b>	<b>-7,431,484</b>	<b>4.97%</b>
<b>Total Future and Other Programming &amp; Reserves</b>	<b>7,453,927</b>	<b>19,301,384</b>	<b>(11,847,457)</b>	<b>38.6%</b>
<b>Expense</b>				
Global Marketing	5,137,765	15,155,861	(10,018,096)	33.9%
Global Strategic Partnerships	1,151,076	2,357,961	(1,206,885)	48.8%
Global Strategic Partnerships - RCTP	7,850,259	8,074,900	(224,641)	97.2%
Global Strategic Partnerships - Grants	619,757	4,960,838	(4,341,081)	12.5%
Global Sales	1,696,968	3,283,000	(1,586,032)	51.7%
Destination Development	906,873	2,436,982	(1,530,109)	37.2%
Administration & Operations	2,000,153	4,709,188	(2,709,035)	42.5%
<b>Total Expense</b>	<b>19,362,851</b>	<b>40,978,729</b>	<b>(21,615,879)</b>	<b>47.3%</b>
<b>Total Uses:</b>	<b>26,816,777</b>	<b>60,280,113</b>	<b>(26,031,852)</b>	<b>44.5%</b>
<b>Net Income</b>	<b>19,733,710</b>	<b>2,275,835</b>	<b>17,457,875</b>	
<b>Wine Country License Plate Program:</b>				
<b>Sources:</b>				
Wine Country License Plate Sales	221,240	-	221,240	100.0%
Beginning Balance for Distribution: Tourism Promotion	267,155	267,155	-	100.0%
Beginning Balance for Distribution: Grants	387,617	387,617	-	100.0%
<b>Total Sources</b>	<b>876,012</b>	<b>654,772</b>	<b>221,240</b>	
<b>Uses:</b>				
Tourism Promotion	22,761	267,155	(244,394)	8.5%
Grants	85,125	387,617	(302,492)	22.0%
<b>Total Uses</b>	<b>107,886</b>	<b>654,772</b>	<b>(546,886)</b>	
<b>Net Income</b>	<b>768,126</b>	<b>-</b>	<b>768,126</b>	
<b>Total Net Income</b>	<b>20,501,835</b>	<b>2,275,835</b>	<b>18,226,001</b>	



# Oregon Tourism Commission

## Balance Sheet

As of December 31,  
2019

### ASSETS

#### Current Assets

##### Checking/Savings

Unrestricted Cash 22,343,927

Cash - Grants 4,120,589

Cash - committed for future RCTP & Grants 8,965,846

Restricted Cash - Wine Country Plates 954,656

Total Checking/Savings 36,385,018

Accounts Receivable 25,154

Other Current Assets 79,486

Total Current Assets 36,489,659

Fixed Assets 333,000

Other Assets 32,982

**TOTAL ASSETS 36,855,641**

### LIABILITIES, EQUITY & FUND BALANCES

#### Liabilities

##### Current Liabilities

Accounts Payable 1,628,894

Other Current Liabilities 484,813

Total Current Liabilities 2,113,707

Long Term Liabilities 0

Total Liabilities 2,113,707

#### Equity & Fund Balances

Regional (RCTP) 6,653,063

Grants 2,312,783

Invested in capital assets 333,000

Reserved for prepaids 106,300

Operating Reserve 3,148,422

Reserved for IOF 1,500,000

Restricted for Wine Country Plates 954,656

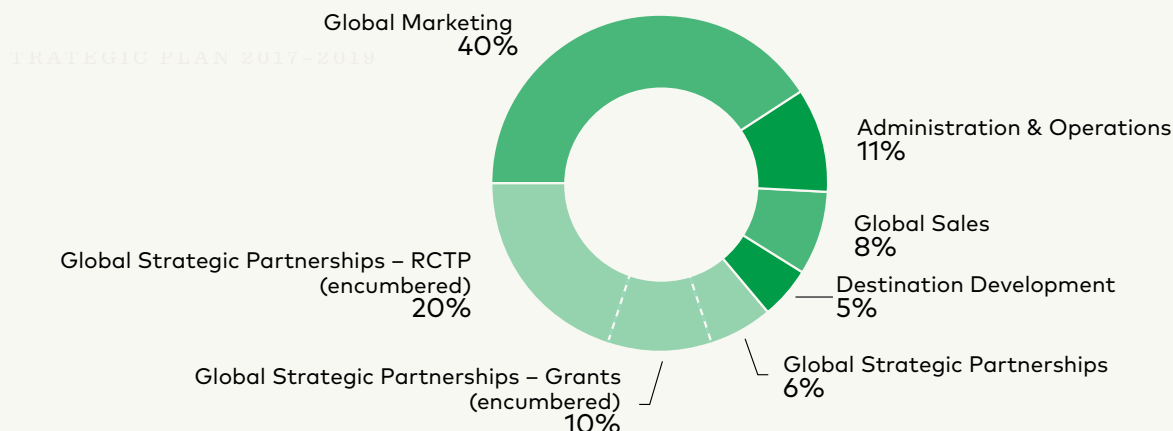
Net income 19,733,710

Total Equity and Fund Balances 34,741,935

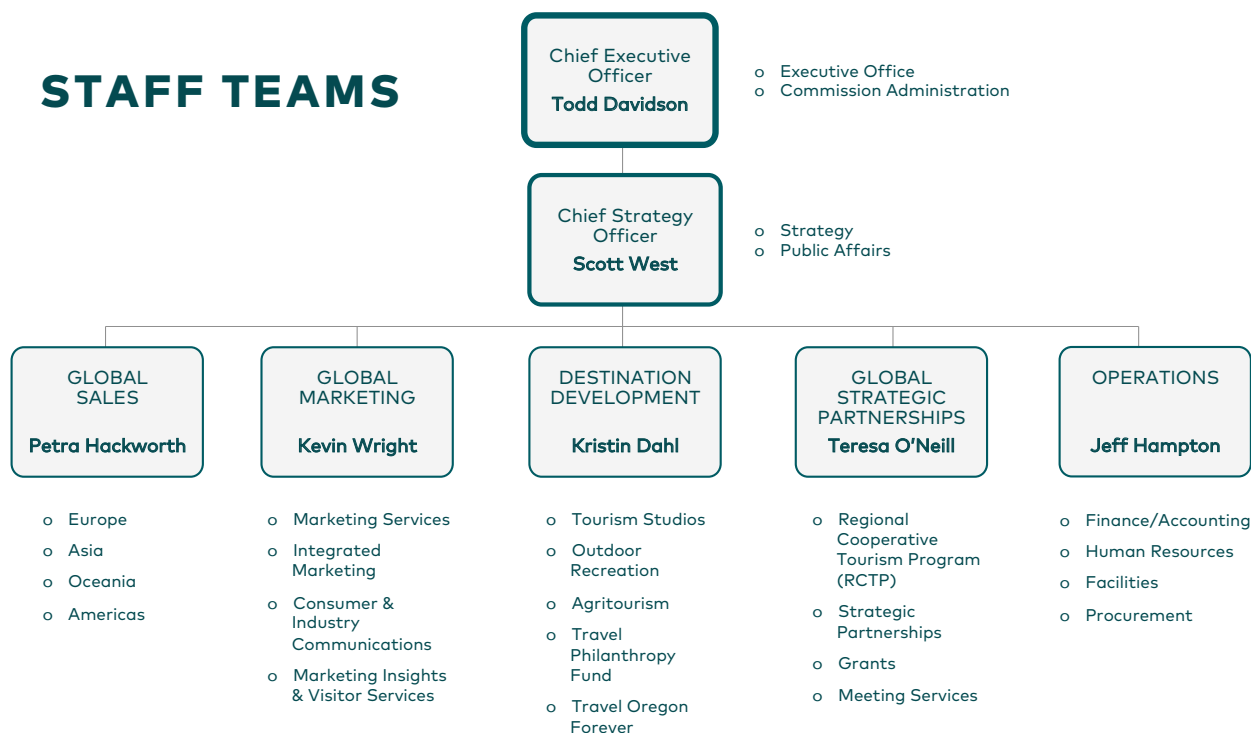
**TOTAL LIABILITIES, EQUITY & FUND BALANCES 36,855,641**

## 2019-21 BIENNIAL BUDGET

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



## STAFF TEAMS







RITNER CREEK  
BRIDGE

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