



**TRAVEL**  **OREGON**

2023-2025 Strategic  
Plan Development

**4.3.23**

Photo credit: dronscape

# PLAN DEVELOPMENT

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# FRAMEWORK FOR 23-25 STRATEGIC PLAN DEVELOPMENT

# PROPOSED APPROACH



# TIMELINE AND ACTIVITIES

## February 2023

### Activities

- Develop and deploy stakeholder survey
- Complete pre planning activities for 23-25 budget
- Develop 23-25 strategic planning report template (based on Strategic Vision outline)
- Share 23-25 strategic planning approach with staff, industry and key partners
- Share 23-25 revenue forecast at Commission meeting (Feb. 22)

## March 2023

### Activities

- Review and analyze stakeholder survey results (by 3/17)
- Confirm "Do It Now" and "Do it Next" priorities post stakeholder survey results
- Commence initial draft 23-25 budget
- Prepare key strategic plan information for Governor's Conference

## April 2023

### Activities

- Share key strategic plan information at Governor's Conference (April 3)
- Finalize draft 23-25 budget
- Finalize draft strategic planning report
- Connect with regions to connect their plans to the draft 23-25 strategic plan

## May 2023

### Activities

- Send draft 23-25 budget and strategic plan to Commission (May 1)
- Send draft 23-25 budget and strategic plan to key stakeholders and post for public comment (May 10)
- Conduct virtual public hearing on draft 23-25 budget and strategic plan (Mid-May)
- Close public comment period (May 31)
- Modify draft 23-25 budget and strategic plan (as needed)

## June 2023

### Activities

- Send draft 23-25 budget and strategic plan to Commission (June 5)
- Commission meeting to adopt 23-25 budget and strategic plan (June 13)
- Submit 23-25 budget to Legislative Financial Office (June 20)
- Connect with regions to connect their plans to the 23-25 strategic plan

# PRIORITIZED STRATEGIES FROM 10-YEAR VISION

# PRIORITIZATION CRITERIA

## **We will prioritize strategies that...**

- Have the greatest impact to our vision, mission, and objectives
- Its completion is dependent on other strategies getting started
- Create opportunities for cross functional synergies
- Help achieve multiple KPIs
- May be mandated by the state
- Align with insights provided by the stakeholder survey and other insights
- Support multiple regions

# OREGON'S TOURISM ECONOMY IS FLOURISHING

*Oregon's tourism industry contributes to strong, balanced and optimized economic growth.*

## STRATEGIES

- 1. Improve perception of the value of tourism and increase advocacy among industry workforce, residents and policymakers.**
- 2. Tell authentic, honest stories accurately reflecting the historic and present intersecting identities and cultures of Oregon's communities.**
- 3. Increase demand by leveraging Oregon's brand through engagement of broader audiences inclusive of Oregon's diverse cultures, people and places.**
- 4. Create flexible, targeted promotions that address visitor pressures — dispersing visitation and economic impacts — by focusing on visitor passions and market research/trends.**
- 5. Align and support communications across the tourism industry to improve visitor behaviors and experiences with timely information, responsible recreation practices and respect for all communities.**
- 6. Expand opportunities for residents and tourism stakeholders to actively engage and collaborate in destination management processes; provide timely feedback loops.**



# OREGON IS STRIVING TO BE A PLACE OF EQUITY

*Oregon's tourism industry is contributing to decrease inequities that harm historically and currently underserved and under-resourced communities.*

## STRATEGIES

- 1. Work in collaboration with stakeholders to develop and implement a racial equity plan incorporating the strategies from the State of Oregon Diversity, Equity and Inclusion Action Plan.**
- 2. Ensure diversity, equity and inclusion (DEI) is emphasized and integrated agencywide, from programming and procurement to employee recruitment and training.**
- 3. Increase awareness of, advocate for and advance social equity within Oregon's tourism workforce.**
- 4. Engage with industry stakeholders to apply the racial equity lens – supporting welcoming destinations and helping reduce impacts of racial inequities.**
- 5. Foster deep relationships with and elevate the voices of historically and currently underserved and under-resourced communities, including BIPOC, Oregon's nine federally recognized tribes and LGBTQIA+ communities.**

# OREGON DELIVERS REMARKABLE EXPERIENCES

*Stakeholders are aligned on the identification and promotion of experiences making Oregon a thriving place to live and visit.*

## STRATEGIES

- 1. Support the stewardship and development of new and existing tourism experiences and amenities.**
- 2. Stimulate and bolster regenerative tourism business and product development opportunities in urban, rural and tribal lands, providing visitors with immersive Oregon experiences.**
- 3. Reduce high visitation pressures and increase community livability by investing in the development of niche tourism product that is based on growing visitor demand and Oregon's competitive advantage (e.g., outdoor recreation, culinary, agritourism, arts and culture).**
- 4. Provide resources and assistance to tourism-related businesses, organizations and communities that are experiencing, or have experienced, crises (e.g., wildfires, drought and global pandemic).**
- 5. Utilize partnerships to advance educational and career opportunities to develop, attract and retain Oregon's tourism workforce.**

# STAKEHOLDER SURVEY RESULTS



# 2023 Oregon Tourism Industry Stakeholder Survey

Statewide Summary of Results | March 2023

**DRIFTLINE**  
CONSULTING

for



# PURPOSE

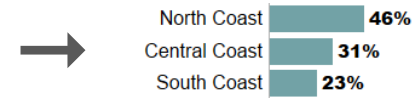
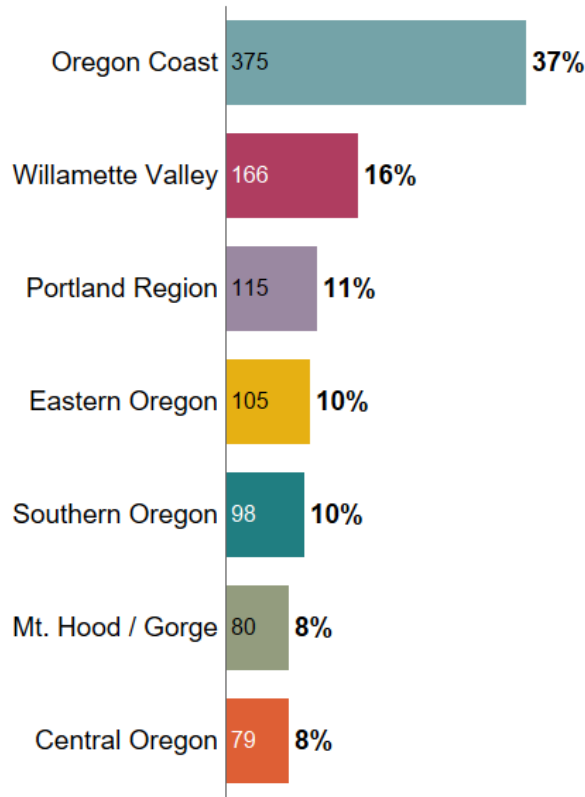
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- The 2023 Oregon Tourism Industry Stakeholder Survey was designed to solicit feedback from individuals and organizations linked to the tourism industry.
- As Travel Oregon embarks on its 10-year strategic vision, the results of the survey will help inform strategic direction for Travel Oregon and RDMOs.
- The survey will be used to make funding and programmatic decisions related to marketing, grants, tourism-related infrastructure, visitor management, and more. Findings are incorporated into both Travel Oregon's and RDMO's strategic plans.

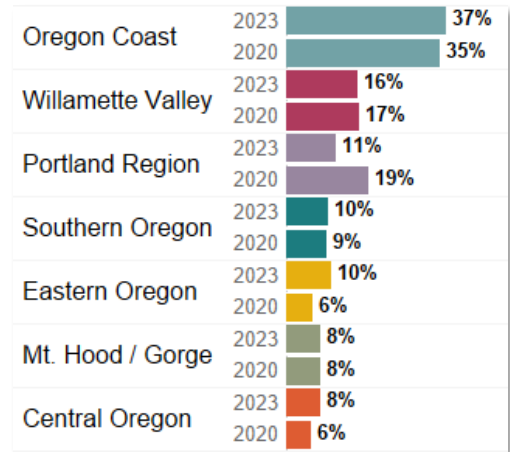
# DATA COLLECTION: RESPONSES BY REGION

- A total of **1,018** valid responses were collected.
- The overall composition of the survey sample by region closely resembles results from 2020.

## Number & Percent of Responses by Region



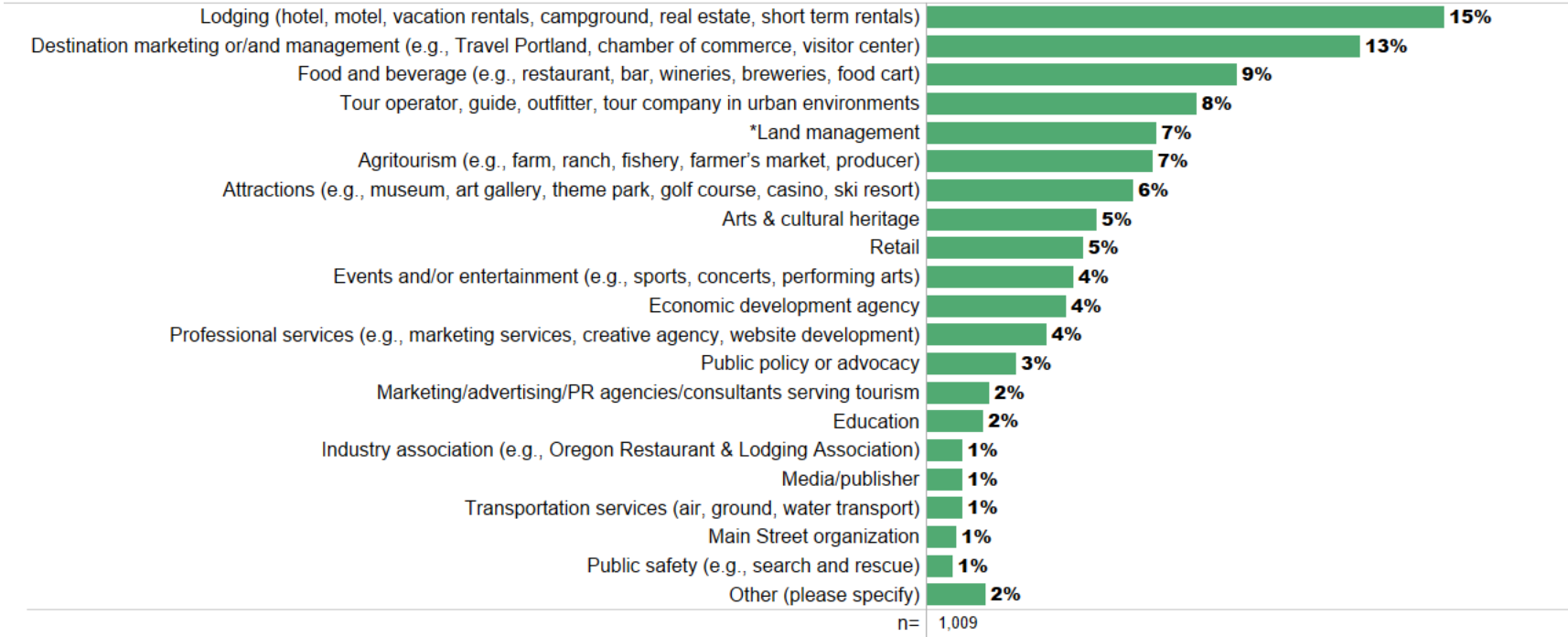
## Percent of Responses by Region vs 2020



Source: 2023 Oregon Tourism Stakeholder Survey

# TOURISM INDUSTRY SECTOR

In what sector of the tourism industry do you primarily work?



\*Answer option abbreviated in reporting.  
Where applicable, "Other" responses have been re-coded into appropriate categories.  
Source: 2023 Oregon Tourism Stakeholder Survey

# STRATEGIES

Please read the following 5 strategies that are being prioritized by Travel Oregon, and rank them based on priority for your community, from 1=highest priority to 5=lowest priority.

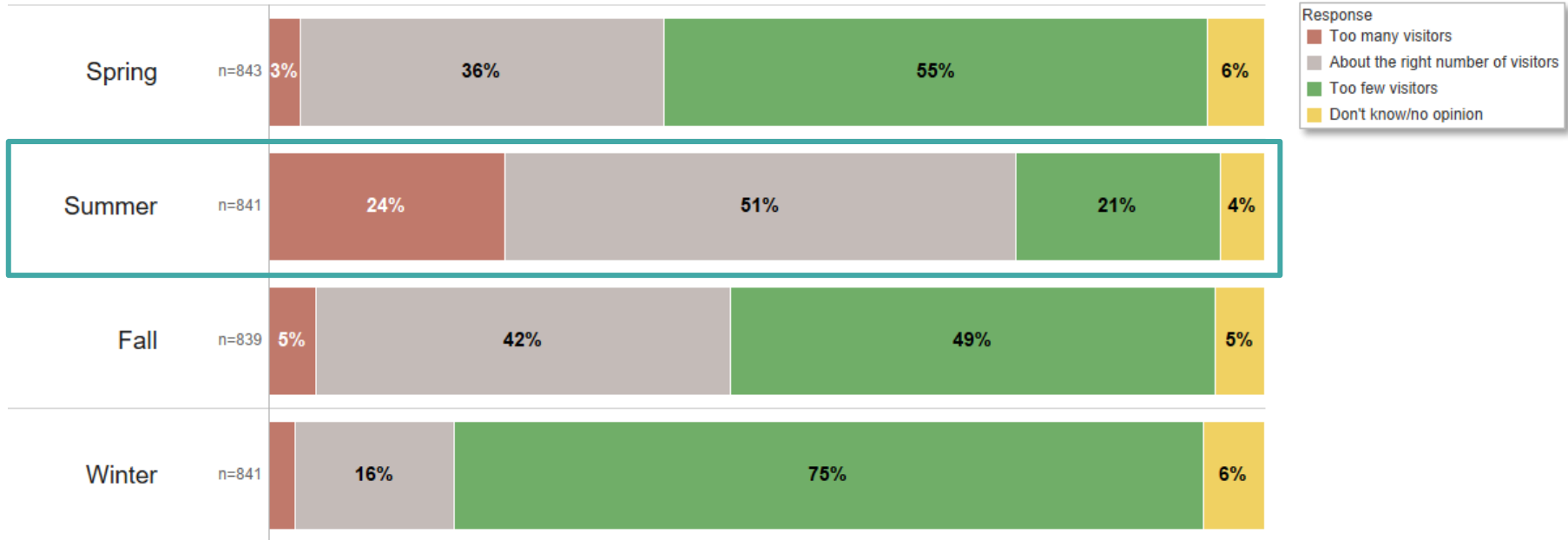
<p><u>STRATEGY 1:</u> Improve perception of the value of tourism and increase advocacy among industry workforce, residents and policymakers.</p>	36%	21%	13%	15%	14%
<p><u>STRATEGY 3:</u> Reduce high visitation pressures and increase community livability by investing in the development of niche tourism product that is based on growing visitor demand and Oregon's competitive advantage (e.g., outdoor recreation, culinary, agritourism, arts and culture).</p>	29%	21%	21%	16%	12%
<p><u>STRATEGY 4:</u> Provide resources and assistance to tourism-related businesses, organizations and communities that are experiencing, or have recently experienced, crises (e.g., wildfires, drought, global pandemic, houselessness).</p>	16%	21%	24%	25%	12%
<p><u>STRATEGY 5:</u> Utilize partnerships to advance educational and career opportunities to develop, attract and retain Oregon's tourism workforce.</p>	11%	20%	22%	22%	24%
<p><u>STRATEGY 2:</u> Ensure diversity, equity and inclusion (DEI) is emphasized and integrated agencywide, from programming and procurement to employee recruitment and training.</p>	8%	16%	19%	19%	37%

Source: 2023 Oregon Tourism Stakeholder Survey



# NUMBER OF VISITORS IN EACH SEASON

With respect to the number of visitors that your community receives each season, would you say there are:

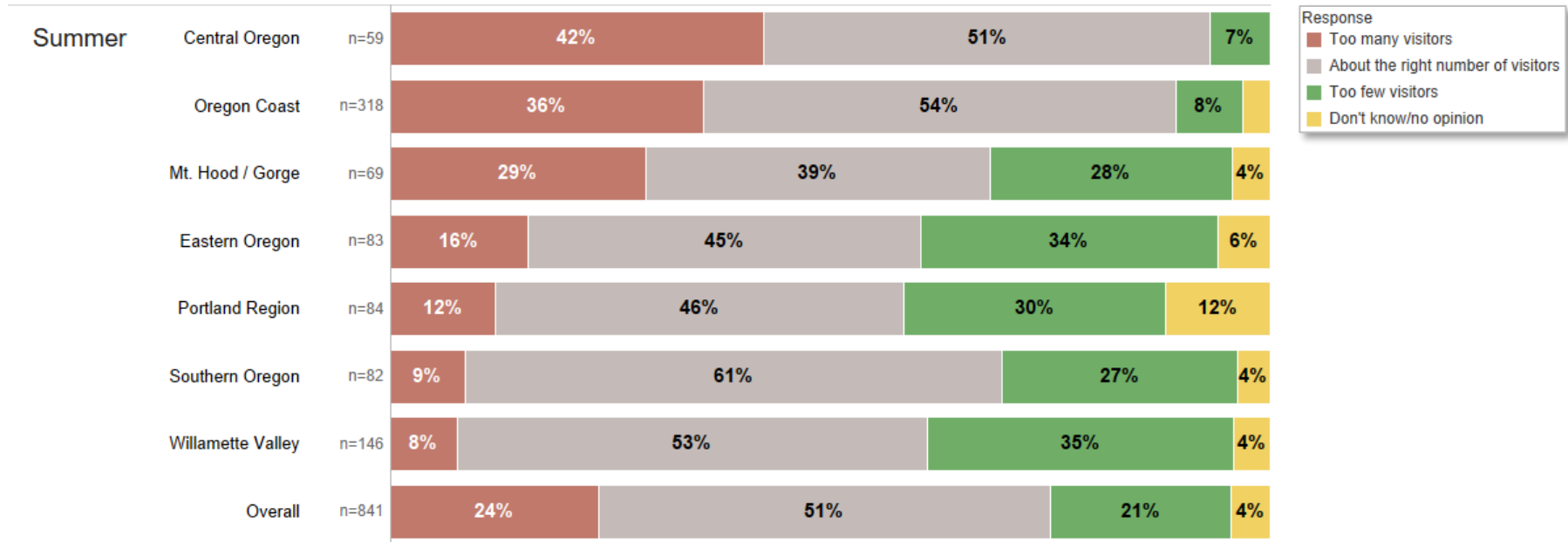


Source: 2023 Oregon Tourism Stakeholder Survey

# NUMBER OF VISITORS IN SUMMER

## BY REGION

With respect to the number of visitors that your community receives each season, would you say there are:



Response

- Too many visitors
- About the right number of visitors
- Too few visitors
- Don't know/no opinion

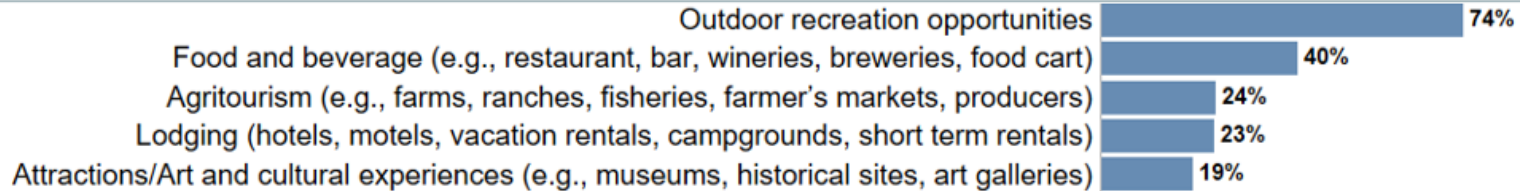
\*Sorted by percent responding "Too many visitors"  
 Source: 2023 Oregon Tourism Stakeholder Survey

# STRENGTHS & AREAS THAT NEED FOCUS (TOP 5)

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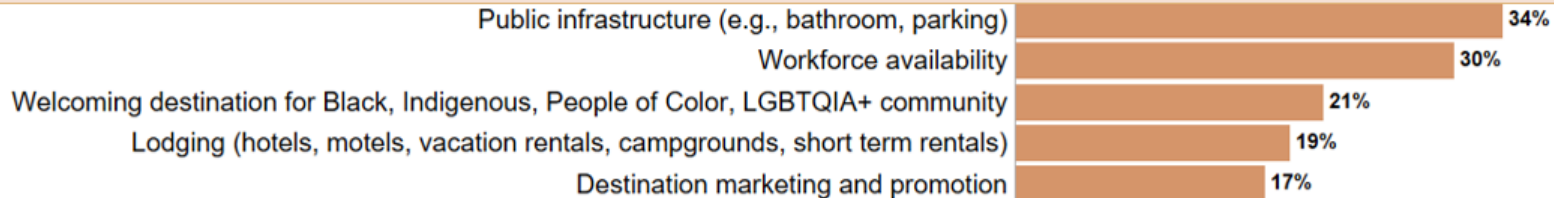
## **Top 5 Strengths:**

“Please identify up to three areas that you consider strengths in your community”

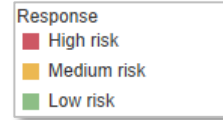


## **Top 5 Areas That Need Focus:**

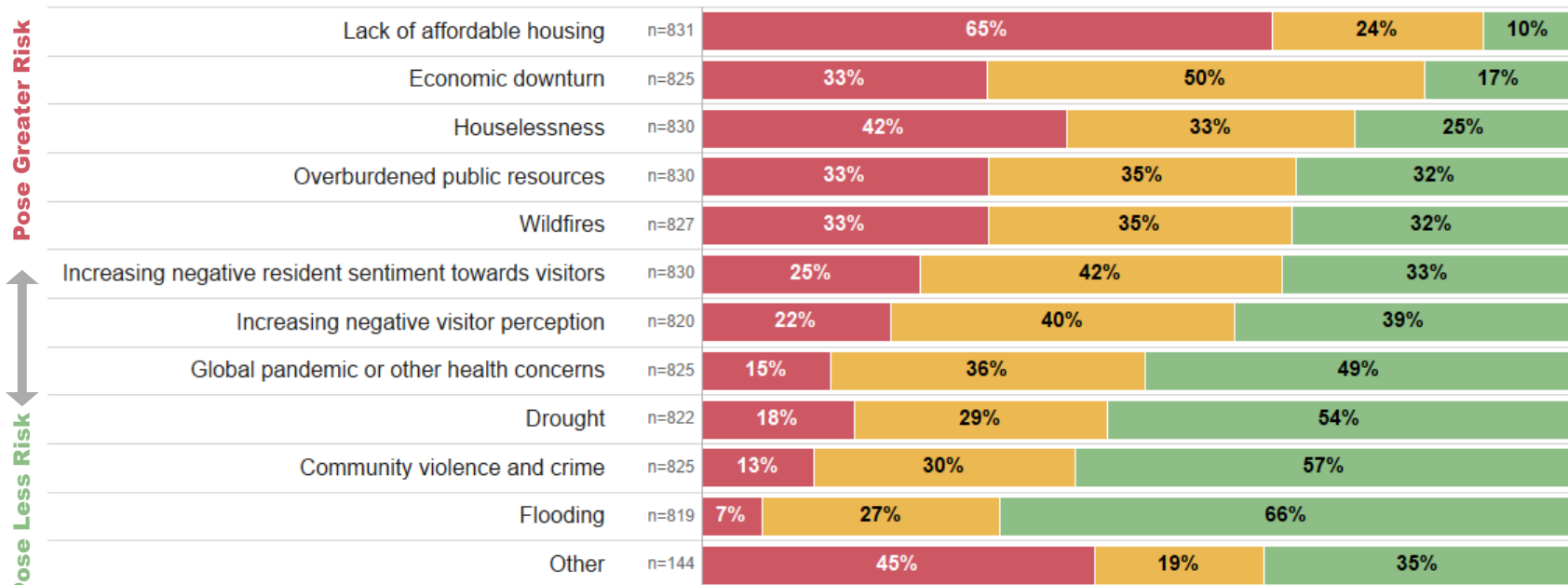
“Please identify up to three areas that your community needs to focus on to improve residents' and visitors' experiences:”



# COMMUNITY CHALLENGES OVERALL



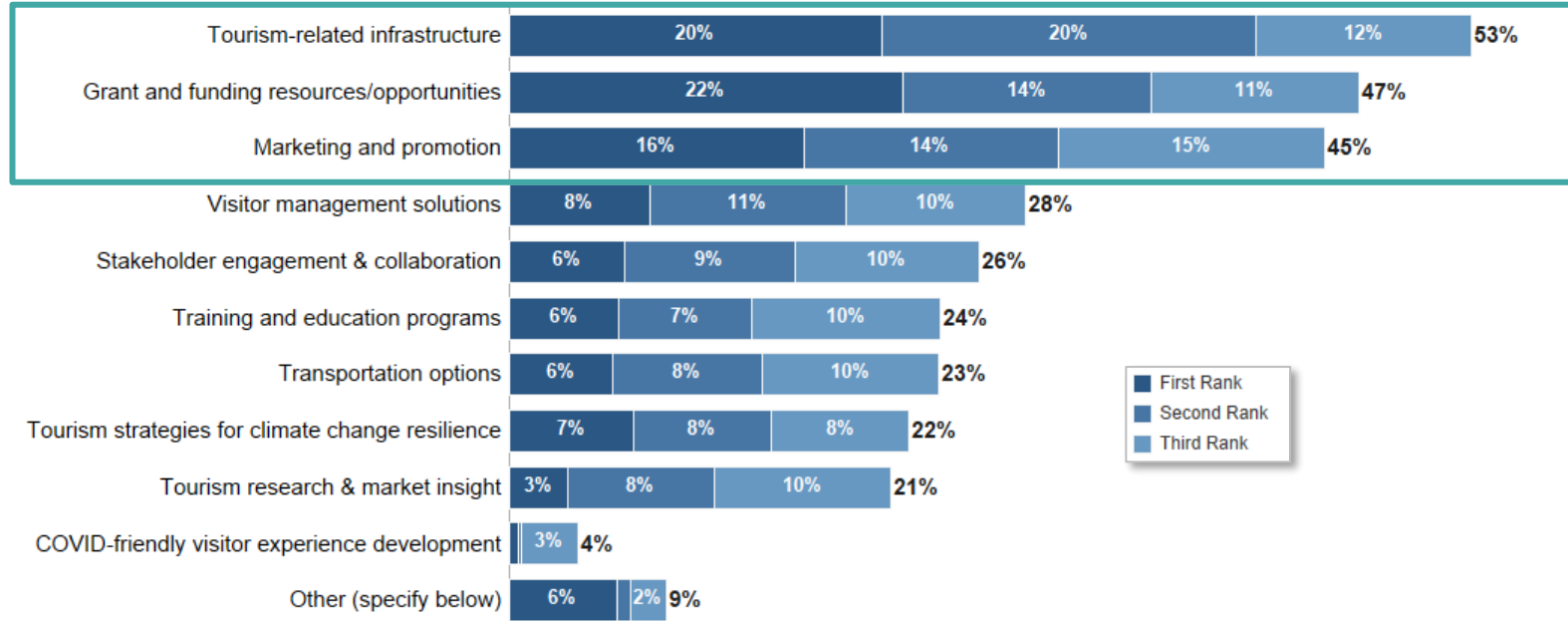
Please rate the extent to which each challenge poses a risk to tourism in your community:



\*Categories sorted in descending order by the percent of respondents selecting "High Risk" or "Medium Risk"  
Source: 2023 Oregon Tourism Stakeholder Survey

# LONG-TERM PLANNING PRIORITIES

Please identify the three areas that you believe should be emphasized for tourism planning over the next 2 to 5 years in Oregon:



Source: 2023 Oregon Tourism Stakeholder Survey

# ECONOMIC IMPACTS

# OREGON TOURISM PERFORMANCE

## COVID-19 Impacts

	IN 2003	IN 2020	IN 2022	CHANGE (2003-22)
<i>Direct Employment</i>	85,590 jobs	92,300	117,360	+37%
<i>Employee Earnings</i>	\$1.7 billion	\$3.1 billion	\$4.3 billion	+154%
<i>Visitor Spending</i>	\$6.5 billion	\$6.5 billion	\$13.8 billion	+113%
<i>Taxes (State/Local)</i>	\$242 million	\$416 million	\$643 million	+166%

Source: Oregon Travel Impacts, Dean Runyan Associates, 2022

# 2023-2025

## TLT REVENUE FORECAST

### **Current** *(Revised 12.2022)*

2021-2022	\$35,786,306
2022-2023	\$38,000,000
Total TLT Adopted 2021-2023	\$73,786,306

### **Proposed**

2023-2024	\$42,000,000	(+4% ~\$40.5M)
2024-2025	\$45,700,000	(+9% over FY24)
Total TLT Forecast 2023-2025	\$87,700,000	(+19% over current BY21-23)



Thank you

