

TRAVEL OREGON

**OREGON TOURISM COMMISSION MEETING
PORTLAND**

April 14, 2025

TRAVEL OREGON 2025-2027 STRATEGIC BIENNIAL PLAN

Oregon Tourism Commission



TRAVEL  OREGON

REGROUNDING **STRATEGIC VISION**

OUR VISION

Oregon is a welcoming destination where tourism drives economic prosperity, benefits the natural environment and celebrates rich, diverse cultures.

REGROUNDING **STRATEGIC VISION**

OUR MISSION

**We inspire travel that uplifts Oregon communities.
Collaborating with partners to align as stewards of Oregon,
we work to optimize economic opportunity, advance equity
and respect the ecosystems, cultures and places that make
Oregon...Oregon.**

VALUES

INTEGRITY

Our words match our actions. We measure the impact of our work, celebrate successes, adapt and change course when necessary, and continually improve together.

EQUITY

We lead through a lens of racial equity and commit to making systemic changes, so Oregon is a more equitable place to live and visit.

COMMUNITY

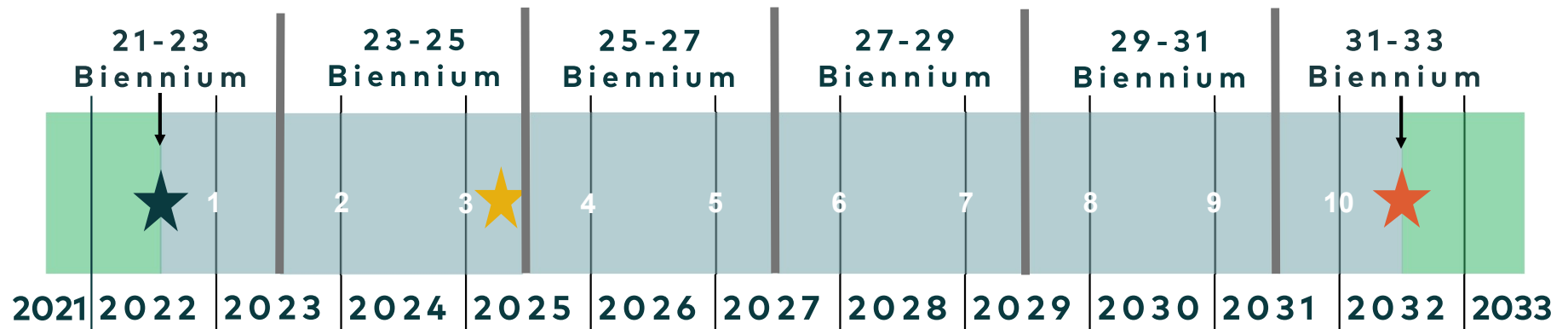
We honor the people, cultures and places of Oregon. We nurture our relationships with colleagues, the tourism industry and local communities as we collaborate to make better Oregon experiences.

STEWARDSHIP

We lead through a lens of destination stewardship to build resiliency for a regenerative future.

10-YEAR VISION JOURNEY

3.5 BIENNIAL PLANS LEFT



- ★ Adoption of current 10 Year Vision
- ★ You are here
- ★ Completion of 10 Year Vision

25-27 STRATEGIES

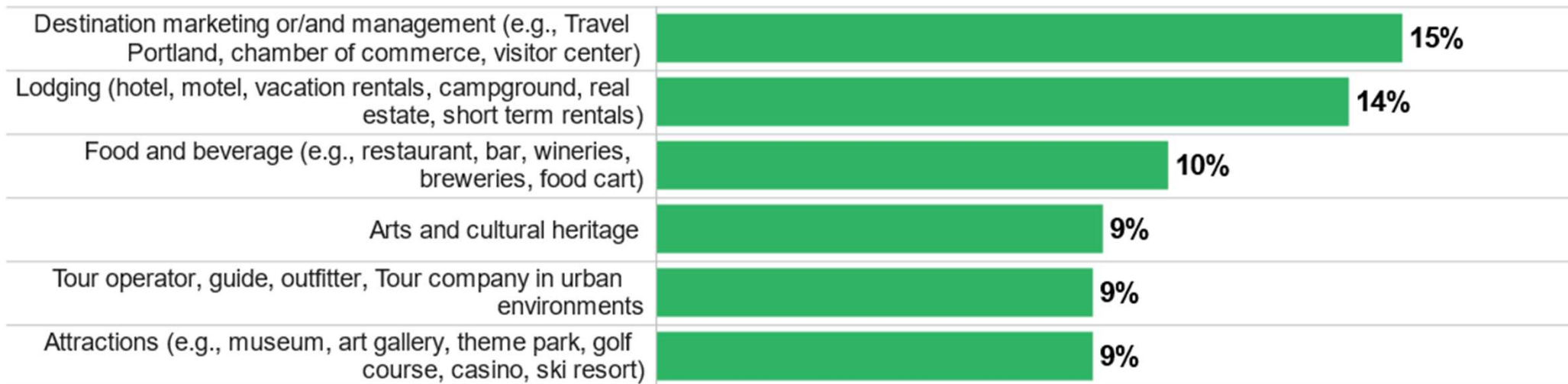
BIENNIAL PLANNING & BUDGET PROCESS TO DATE



TOURISM INDUSTRY PARTNER SURVEY (TIPS)

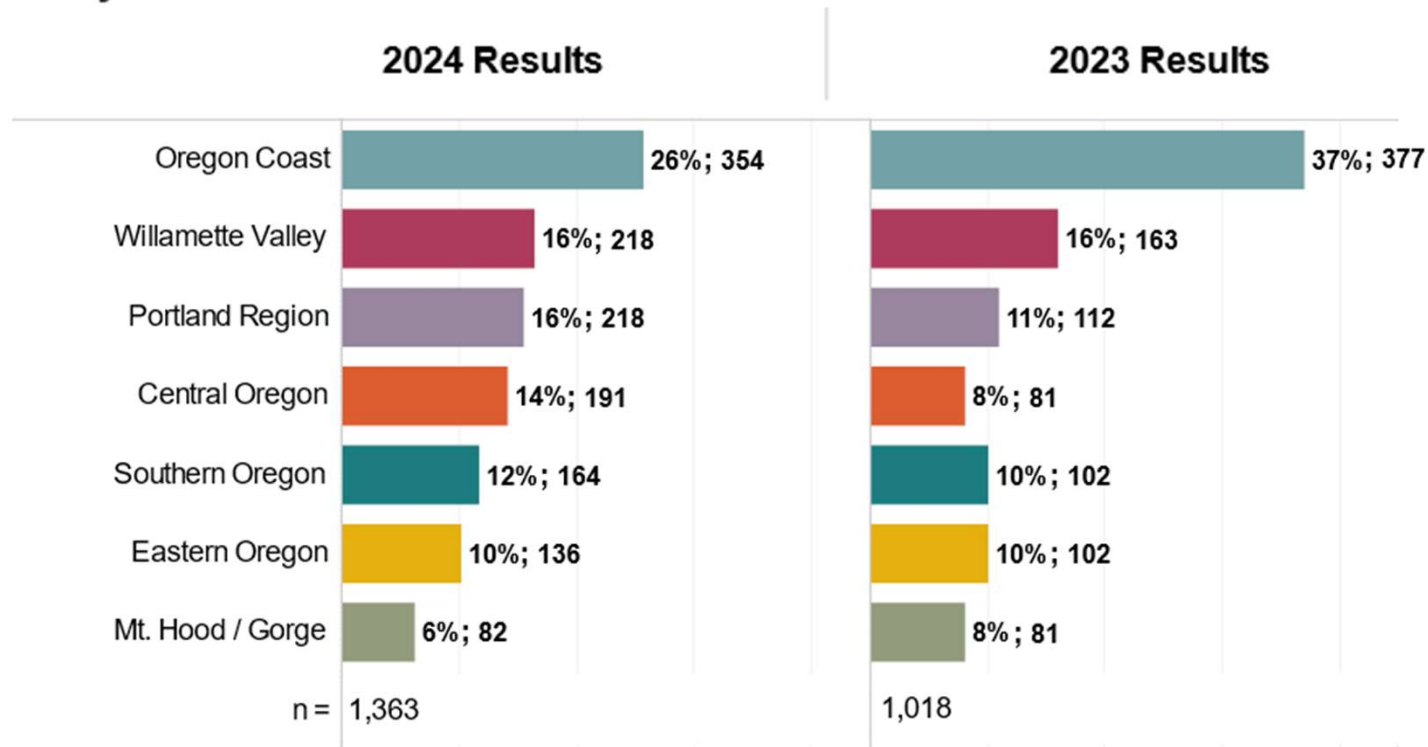
TOURISM INDUSTRY PARTNER SURVEY RESULTS

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



TOURISM INDUSTRY PARTNER SURVEY RESULTS

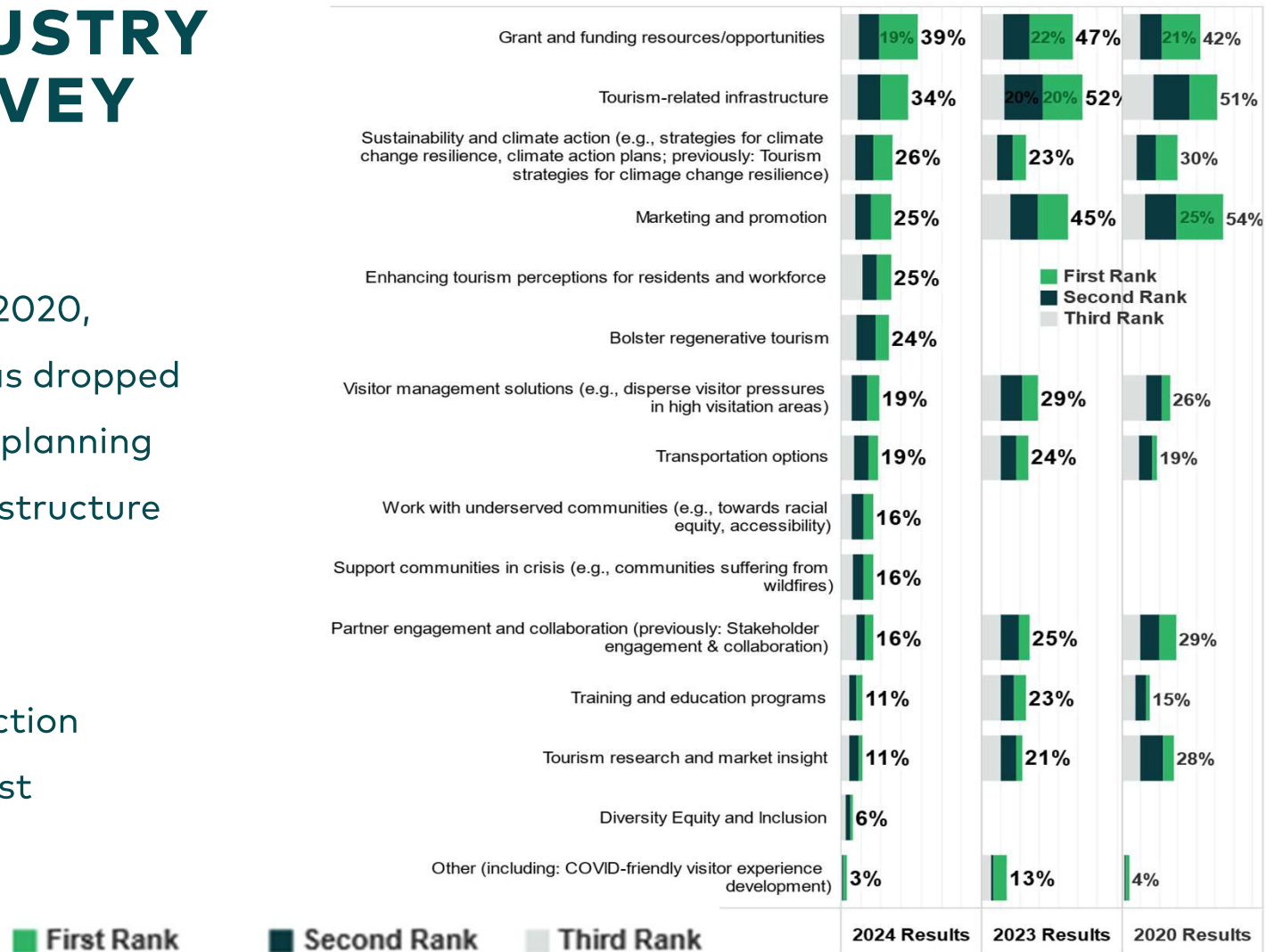
In which region do you primarily work, or in which region is your business/organization primarily located? If you are currently unemployed, in which region do you live?



TOURISM INDUSTRY PARTNER SURVEY RESULTS

- According to partners since 2020, marketing and promotion has dropped in importance for long-term planning with grant funding and infrastructure becoming more prominent.
- Sustainability and climate action remains strong amongst most partners over time.

Please identify the three areas that you believe should be emphasized for longer-term tourism planning over the next 2 - 5 years. (Rank top three priorities within this list)



OBJECTIVES & STRATEGIES

These four interconnected objectives will bring our mission to life — helping us reach our vision with priority strategies.

»» Oregon's tourism economy is flourishing.

»» Oregon is striving to be a place of equity.

»» Oregon delivers remarkable experiences.

»» Oregon respects its natural environments.

REQUIRED TO OPERATE

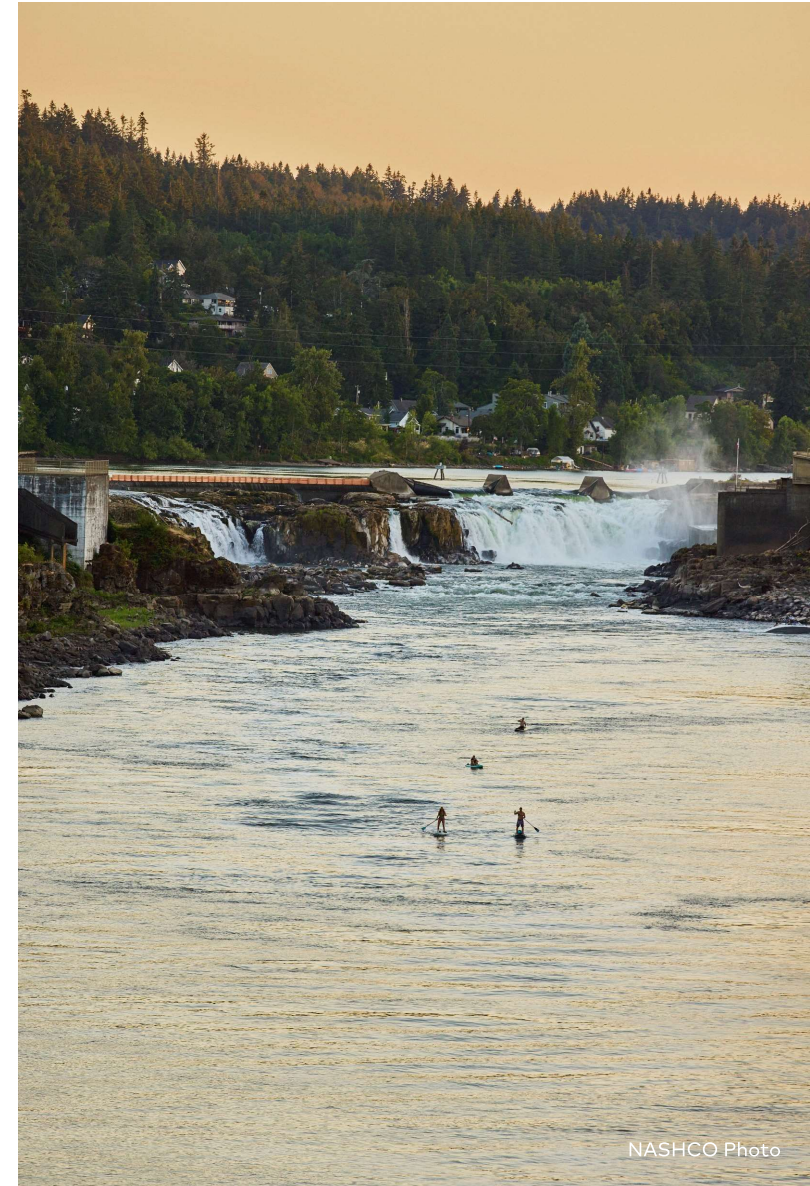
- Welcome Center Management
- Employee Benefit Management
- Payroll
- Matching Grants
- Competitive Grants
- RCTP



DEFINITIONS

CORE DELIVERY

- Our Core Delivery work is comprised of programs and projects that are often repeated but should be reviewed annually.
- Core Delivery work aligns with our strategies or optimize Travel Oregon's ways of working.
- This work is planned through Travel Oregon's annual planning cycle completed by functional teams and departments.



NASHCO Photo

CORE DELIVERY STRATEGIES

2025-27 Core Delivery

Advance Perception of Tourism Value

Attract and Retain Tourism Workforce

Increase Social Equity within Oregon's Tourism Workforce

Create Target Promotions Focused on Visitor Passions/Trends

Elevate Voices of Underserved Communities

Expand Destination Management Engagement

Tell Authentic Stories about Oregon Cultures

Increase Demand by Engaging Diverse Audiences

Reduce High Visitation Pressures via Niche Product Investment

DEFINITIONS

ACTION PLANS

- Action plans are meant to establish funding and scope of projects focused on the biennium timeline – these are “foundation builders” for future efforts at Travel Oregon or existing program areas needing new direction or improvement.
- An Action Plan's scope should be limited to what is achievable within a biennium and the plan should directly impact our Strategic Vision KPIs.
- Once an action plan is finished then that strategy is complete for the biennium.
- The 19 strategies will be reviewed during each biennial planning cycle to determine the next round of strategies requiring action plans.



ACTION PLAN STRATEGIES

2025 – 27 Action Plans

Improve Visitor Behavior ★

Develop a Racial Equity Plan with Oregon Partners ★

Integrate DEI Agencywide

Support Development of Experiences for the Underserved

Assist Communities in Crisis

Implement a Tourism Climate Action Plan ★

★ = New for 2025-27

PENDING

- Work pending completion of other strategies
- Work requiring yet-to-be hired staff
- Work that requires other foundational work to be completed/defined (e.g. Regenerative Tourism Lens)
- Work not yet ready to begin for other reasons



PENDING STRATEGIES

2025 – 27 Pending

Support Welcoming Destinations by Engaging Industry Partners

Bolster Regenerative Tourism

Sustain Natural Resources

Equip Industry to Apply Regenerative Tourism

MEASURING PROGRESS

KPI BASELINES

Annual Visitor Spending
Tourism Employment
Tourism Tax Revenue
Funding Underserved & Under-Resourced
Engagement Underserved & Under-Resourced
Resident Social Perception
Resident Cultural Perception
Resident Economic Perception
Resident Environmental Perception
Resident Support for Tourism
Visitor Satisfaction
Visitor Likelihood to Recommend Score
Visitor Likelihood to Return Score
Funding Supporting Greenhouse Gas Emissions
Engagement Supporting Greenhouse Gas Emissions
Visitors Reduce Greenhouse Gas Emissions

**16 of 18
KPIs have
baselines
set**

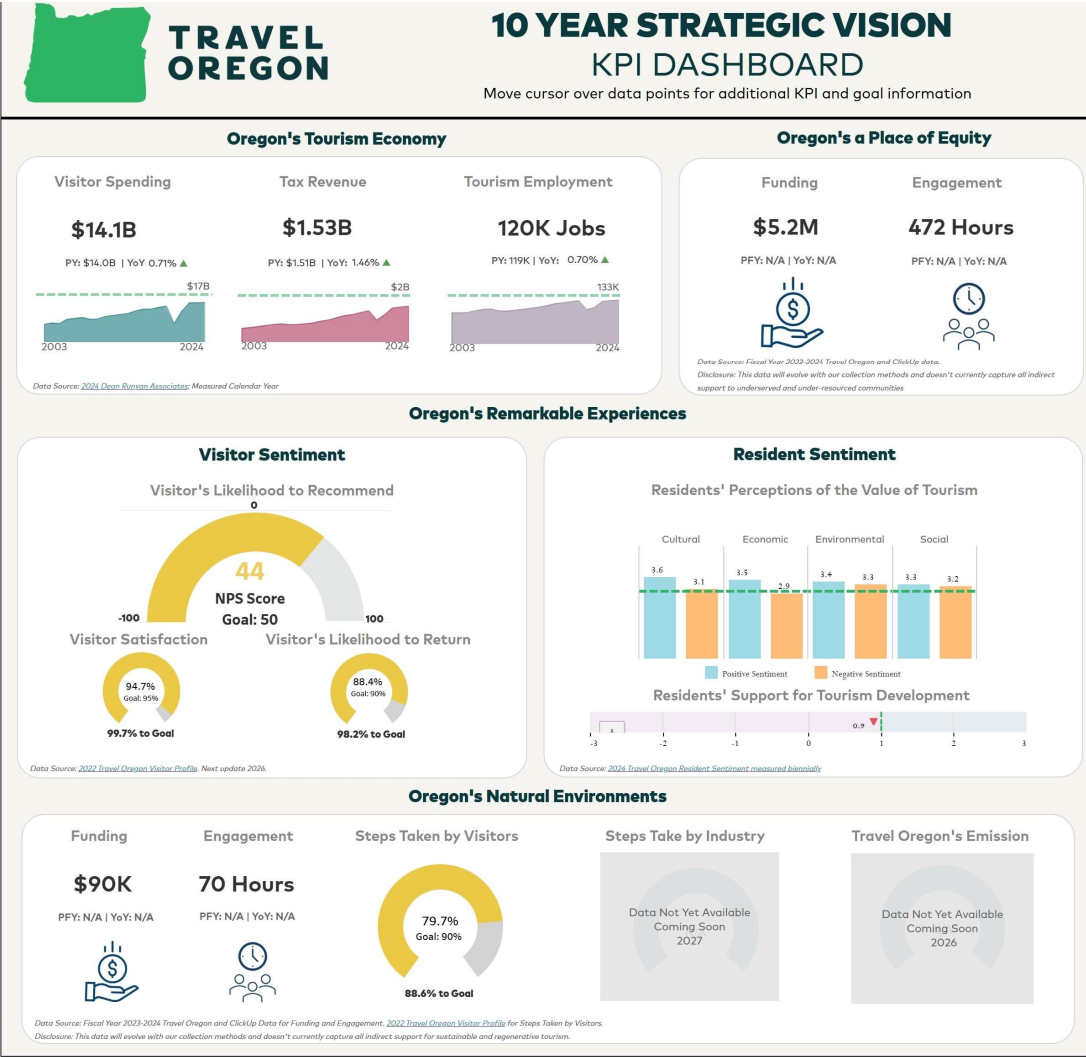
KPI GOALS

Annual Visitor Spending
Tourism Employment
Tourism Tax Revenue
Resident Social Perception
Resident Cultural Perception
Resident Economic Perception
Resident Environmental Perception
Resident Support for Tourism
Visitor Satisfaction
Visitor Likelihood to Recommend Score
Visitor Likelihood to Return Score
Travel Oregon's Greenhouse Gas Emissions
Visitors Reduce Greenhouse Gas Emissions

**13 of 18
KPIs have
goals set**

STRATEGIC VISION DASHBOARD

Coming soon to the
Travel Oregon
Industry website



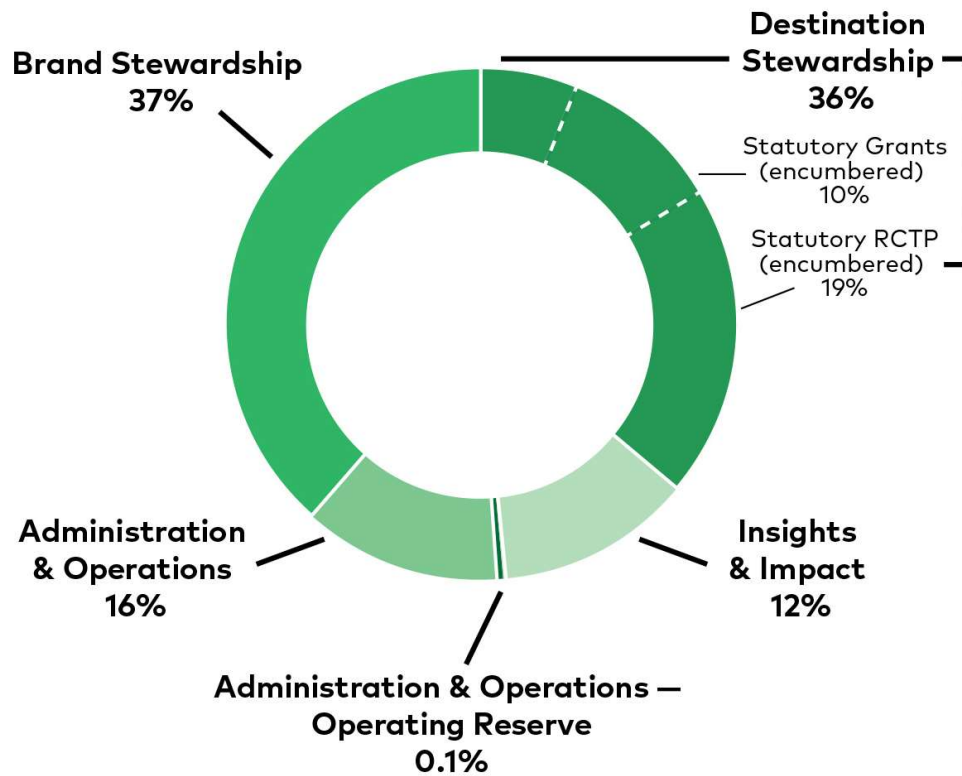
KPI AREAS OF FOCUS

- Support for tourism development
- Visitor spending
- Visitor satisfaction
- Visitor likelihood to recommend score
- Visitor likelihood to return



BUDGETS

2025-27 STRATEGIC PLAN PROPOSED BUDGET



* Percents shown are of all sources of revenue and income.

Transient Lodging Tax	89,200,000
Transient Lodging Tax from FY2024	672,700
Other Income	2,441,500
Total	92,314,200

Program budgets:	
Brand Stewardship	33,979,700
Destination Stewardship	5,993,300
Competitive Grants** (10% encumbered)	8,920,000
RCTP** (20% encumbered)	17,840,000
Insights & Impact	11,130,700
Administration & Operations	14,310,500
Administration & Operations – Operating Reserve	140,000
Total	92,314,200

** Percents shown are statutory requirements applied to TLT forecasted for 25–27 biennium

2025-27 BIENNIAL BUDGET

(LFO) ORS 284.126

	2025-27
Income:	
Transient Lodging Tax	89,200,000
Other	2,441,500
	<u>91,641,500</u>
Expenses:	
Personnel	28,697,000
Services, Supplies, and Equipment	39,002,410
Special Payments	24,474,790
	<u>92,174,200</u>
To fund Operating Reserve	140,000

Notes:

- “Special payments” are Grants and RCTP, net of Administrative expenses; the Administrative expenses are split between Personnel and SSE.
- Budget deficit will be funded from unanticipated revenue from FY2024, \$672,700.

2025-27 DRAFT STRATEGIC PLAN

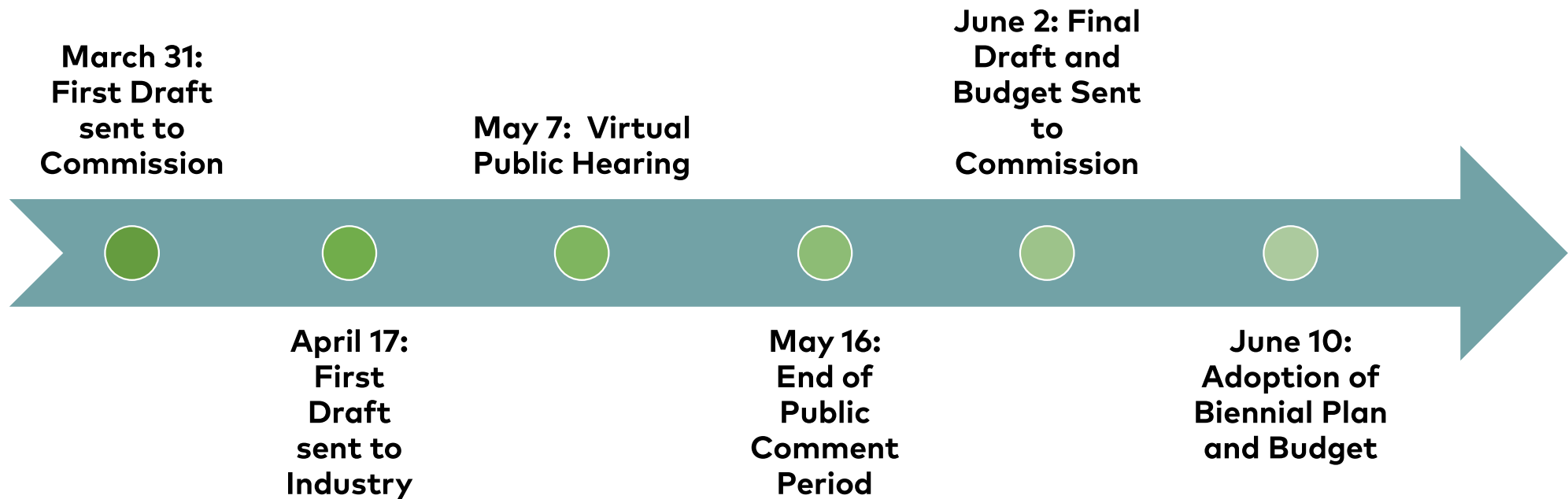
PROPOSED BUDGET

Wine Country License Plates Programs

ORS 805.274

Transfers from ODOT	\$850,000
Special Payments:	
Matching Grants	\$425,000
Tourism Promotion Distributions	\$425,000
Total	\$850,000

STRATEGIC PLAN NEXT STEPS



TRAVEL OREGON 25-27 BIENNIAL STRATEGY OVERVIEW



VISION

Oregon is a welcoming destination where tourism drives economic prosperity, benefits the natural environment and celebrates rich, diverse cultures.

MISSION

We inspire travel that uplifts Oregon communities. Collaborating with stakeholders and partners to align as stewards of Oregon, we work to optimize economic opportunity, advance equity and respect the ecosystems, cultures and places that make Oregon...Oregon.

VALUES

INTEGRITY
COMMUNITY

EQUITY
STEWARDSHIP

OBJECTIVES

Oregon's tourism **economy** is flourishing.

Oregon is striving to be a place of **equity**.

Oregon delivers remarkable **experiences**.

Oregon respects its natural **environments**.

KPIs

Annual visitor spending, tourism employment, and tax revenue

Travel Oregon funding + engagement supporting underserved and under-resourced communities

Resident sentiment on tourism + visitor satisfaction, visitor Net Promoter Score and visitor likelihood to return to Oregon

Travel Oregon's greenhouse gas (GHG) emissions + our funding + engagement dedicated to GHG reduction in Oregon

STRATEGIES

Advance Perception of Tourism Value

Improve perception of the value of tourism and increase advocacy among industry workforce, residents and policymakers.

Tell Authentic Stories About Oregon Cultures

Tell authentic, honest stories accurately reflecting the historic and present intersecting identities and cultures of Oregon's communities.

Increase Demand by Engaging Diverse Audiences

Increase demand by leveraging Oregon's brand through engagement of broader audiences inclusive of Oregon's diverse cultures, people and places.

Improve Visitor Behaviors

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.

Create Targeted Promotions on Visitor Passions/Trends

Create flexible, targeted promotions that address visitor pressures — dispersing visitation and economic impacts — by focusing on visitor passions and market research/trends.

Expand Destination Management Engagement

Expand opportunities for residents and tourism partners to actively engage and collaborate in destination management processes; provide timely feedback loops.

Integrate DEI Agencywide

Ensure diversity, equity and inclusion (DEI) is emphasized and integrated agencywide, from programming and procurement to employee recruitment and training.

Develop a Racial Equity Plan with Oregon Partners

Work in collaboration with industry partners to develop and implement a racial equity plan incorporating the strategies from the State of Oregon DEI Action Plan

Increase Social Equity w/n Oregon's Tourism Workforce

Increase awareness of, advocate for and advance social equity within Oregon's tourism workforce

Support Welcoming Destinations by Engaging Industry Partners

Engage with industry partners to apply the racial equity lens — supporting welcoming destinations and helping reduce impacts of racial inequities.

Elevate Voices of Underserved Communities

Foster deep relationships with and elevate the voices of historically and currently underserved and under-resourced communities.

Support Development of Experiences for Underserved

Support the development of new and existing tourism-related facilities and products (e.g., visitor experiences, attractions, and public spaces) to better serve historically and currently underserved and under-resourced communities.

Bolster Regenerative Tourism

Stimulate and bolster regenerative tourism business and product development opportunities in urban, rural and tribal lands, providing visitors with immersive Oregon experiences.

Reduce High Visitation Pressures Via Niche Product Investment

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).

Assist Communities in Crisis

Provide resources and assistance to tourism-related businesses, organizations and communities that are experiencing, or have experienced, crises (e.g., wildfires, drought, global pandemic).

Attract & Retain Tourism Workforce

Utilize partnerships to advance educational and career opportunities to develop, attract and retain Oregon's tourism workforce.

Implement a Tourism Climate Action Plan

Work in tandem with partners to create and implement a climate action plan in alignment with Executive Order 20-04 to reduce tourism industry carbon emissions.

Sustain Natural Resources

Partner with and support resource management agencies (tribal, local, state, federal) to sustain natural resources and mitigate visitor impacts on public and tribal land and waterways.

Equip Industry to Apply Regenerative Tourism

Provide the tourism industry with opportunities to better understand how tourism impacts the environment, livability and community well-being, as well as how to apply the Regenerative Tourism Lens to their work.

LENSES

These three lenses help guide day-to-day decisions throughout our action-planning and programming efforts:

- Prosperity Lens
- Racial Equity Lens
- Regenerative Tourism Lens

Legend

25-27 Action Plans –

Strategies that need cross-functional input and funding to expand existing program areas or kickstart new program areas.

Core Delivery – Strategies being maintained or advanced annually via departmental and functional team programs.

Pending – Strategies that are waiting on other action plans' completions or new staff to be hired.

THANK YOU