



TRAVEL



OREGON

2023-25 Lookback Report

09.12.2025

Cape Perpetua
Scenic Area

PACIFIC OCEAN

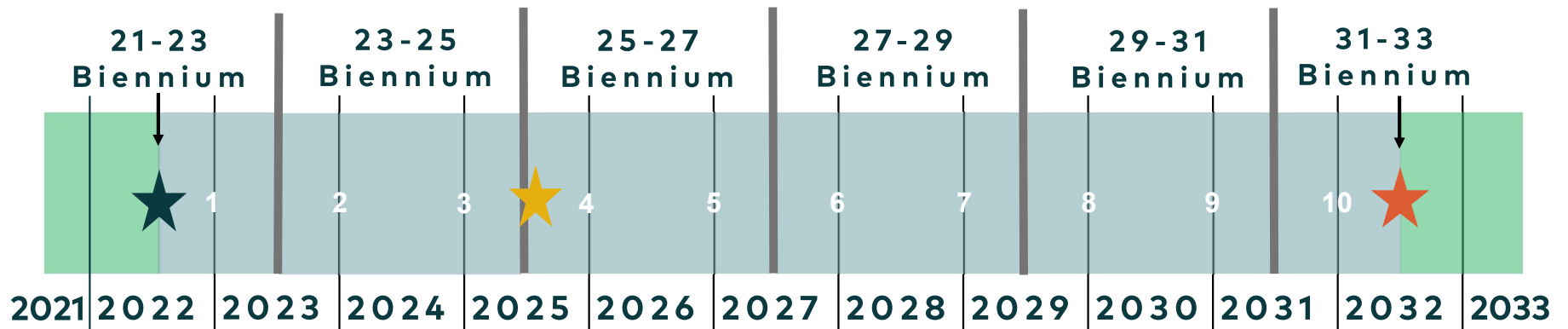


WHAT IS THE 2023-25 BIENNIAL LOOKBACK REPORT?

- Opportunity to assess past strategic progress
- Compilation of notes and feedback from 2023-25 Action Plan leads
- Not a comprehensive strategic plan update, but a snapshot of wins from select strategies

10-YEAR VISION JOURNEY

3.5 BIENNIAL PLANS LEFT

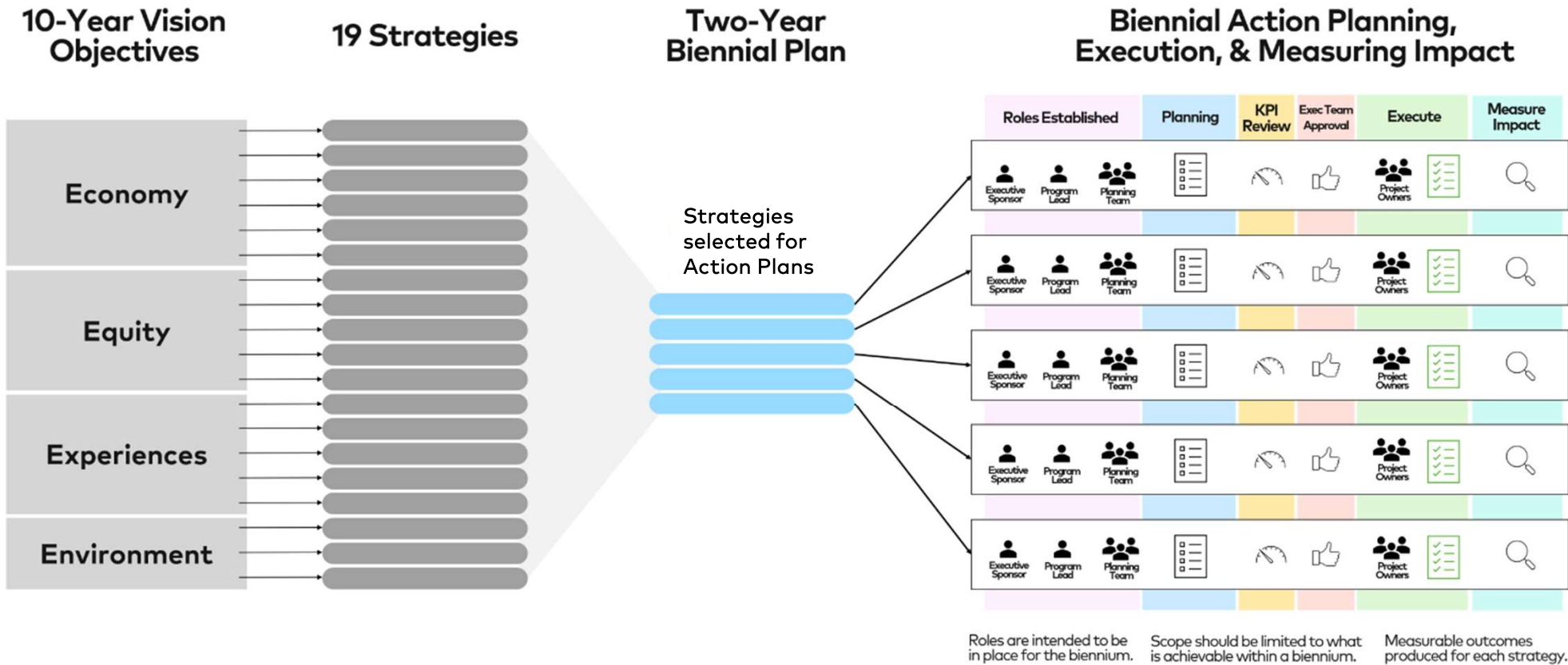


-  Adoption of current 10 Year Vision
-  You are here
-  Adoption of next 10 Year Vision

Strategic Action Planning & Execution Process



A repeatable process of prioritization, planning, & execution to bring the Travel Oregon vision to reality.



23-25 STRATEGIES

ACTION PLAN SELECTION CRITERIA

- Strategies are foundational or need to be completed to start other strategies
- Help achieve multiple Strategic Vision KPIs
- Can be implemented within the biennium and do not have significant capacity constraints
- May be mandated by the state
- And vetted with the industry through the Tourism Industry Partner Survey (TIPS)

2023-25 STRATEGIES BY OBJECTIVE

ECONOMY

- Advance Perception of Tourism Value

EXPERIENCES

- Expand Destination Management Engagement + Reduce High Visitation Pressures via Niche Product Investment
- Attract and Retain Tourism Workforce
- Support Development of Experiences for Underserved
- Assist Communities in Crisis

EQUITY

- Elevate Voices of Underserved Communities
- Integrate DEI Agencywide

STRATEGIC WINS

ECONOMY

ADVANCE PERCEPTION OF TOURISM VALUE

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



ADVANCE PERCEPTION OF TOURISM VALUE WINS

- Successful Resident Sentiment study enabled the first-ever Tourism Workforce Sentiment Study
- Policy Maker Outreach Score tool launched
- Increased workforce trainings and activations
- TLT 20th Anniversary video created
- Sentiment insights directly shaped the Improve Visitor Behavior action plan

STRATEGIC WINS **EXPERIENCES**

ATTRACT AND RETAIN TOURISM WORKFORCE

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



ATTRACT AND RETAIN TOURISM WORKFORCE WINS

- Built relationships with 5 of 9 local workforce boards
- Added workforce-specific questions to TIPS survey
- Sponsored WORKing Together conference
- Launched Travel Oregon 101 video
- 121,020 tourism related jobs in Oregon for 2024

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).



ASSIST COMMUNITIES IN CRISIS

WINS

- Developed a statewide Crisis Communications Plan
- Funded creation of 7 regional crisis comms plans
- Formed an industry task force with regional reps
- \$900K to support events and activations in Central Portland

EXPAND DESTINATION MANAGEMENT ENGAGEMENT + REDUCE HIGH VISITATION PRESSURES

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

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).



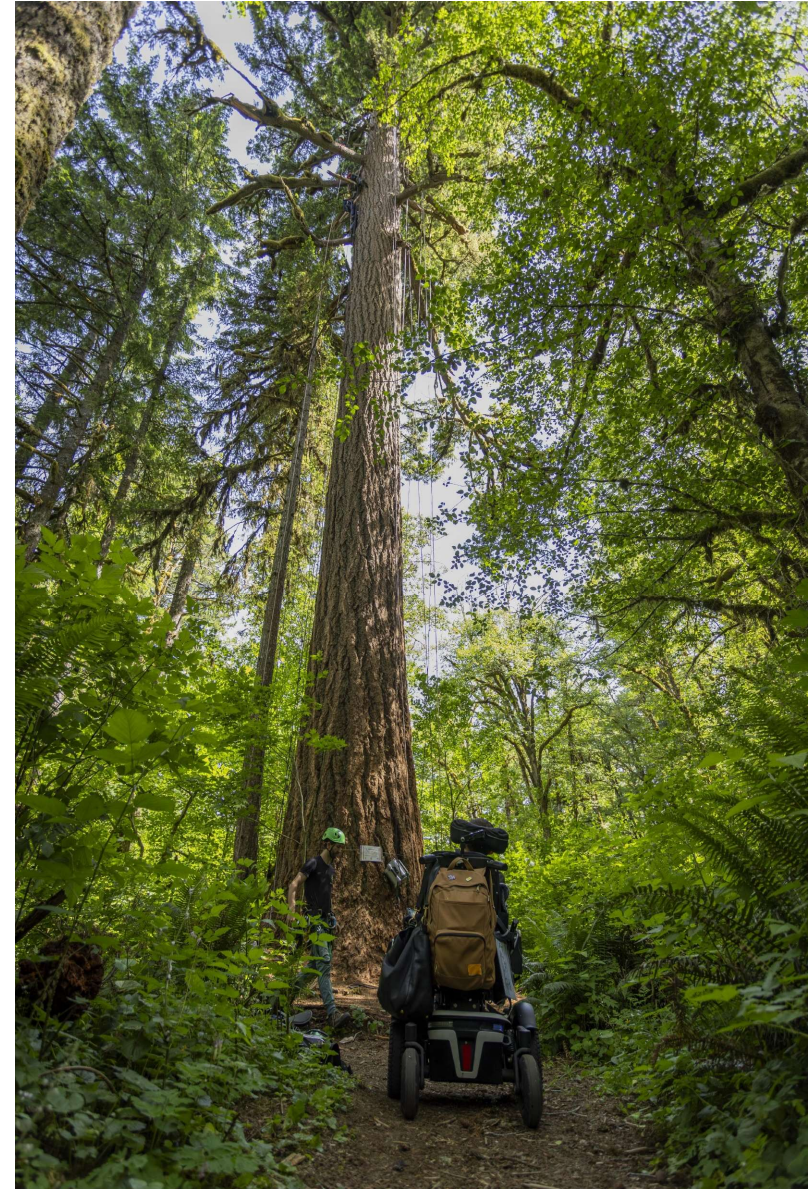
Cody Rheault

EXPAND DESTINATION MANAGEMENT ENGAGEMENT + REDUCE HIGH VISITATION PRESSURES WINS

- Hosted Central Oregon Destination Management Studio
- Set baseline metrics through Resident Sentiment and TIPS surveys
- Partnered with the Travel Foundation to study destination management tactics in other states + countries
- Destination Bootcamp

SUPPORT DEVELOPMENT OF EXPERIENCES FOR UNDERSERVED COMMUNITIES

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.



SUPPORT DEVELOPMENT OF EXPERIENCES FOR UNDERSERVED COMMUNITIES WINS

Wheel the World Partnership

- First state "Accessibility Verified"
- 328 businesses in 21 communities were assessed

Recreation Ready

- 4 rural communities (McKenzie River, Cave Junction, La Grande, Newberg) advancing water recreation, trails and dark sky tourism

STRATEGIC WINS

EQUITY

ELEVATE VOICES OF UNDERSERVED COMMUNITIES

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



ELEVATE VOICES OF UNDERSERVED COMMUNITIES

WINS

- Strengthened relationships with Oregon's nine Tribes
- Sponsored 18 Pride festivals statewide
- Industry events: GovCon and She LEADS
- Built continuity and trust through sustained community outreach

INTEGRATE DEI AGENCYWIDE

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



INTEGRATE DEI AGENCYWIDE

WINS

Implemented inclusive recruitment strategies:

- All hiring teams completed unconscious bias training
- Improved standardization of interview and selection process

NEXT STEPS

2023-25 STRATEGIES

- The work under these strategies is ongoing
- Some transition to everyday work/core delivery while others remain as action plans with new priorities



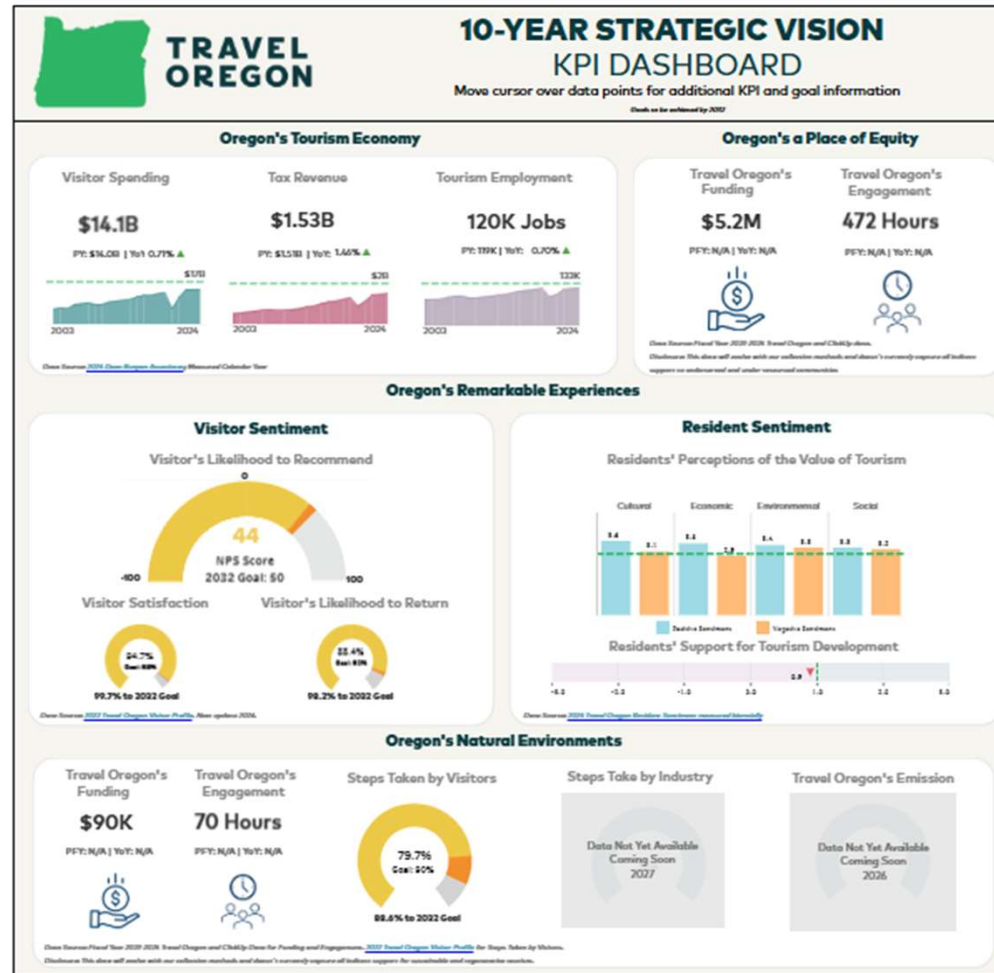
KEY LEARNINGS

2023-25 BIENNIUM

- The importance of setting up foundational work first
- Flexibility to adjust to the current moment is key
- Capacity challenges

KPI GOAL PROGRESS

10-YEAR STRATEGIC VISION KPI DASHBOARD



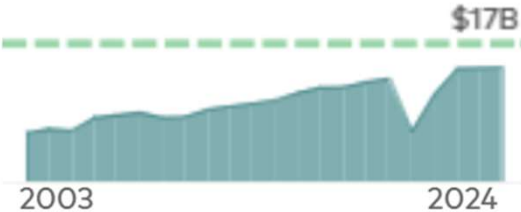
KPI UPDATE

OREGON'S TOURISM ECONOMY

Visitor Spending

\$14.1B

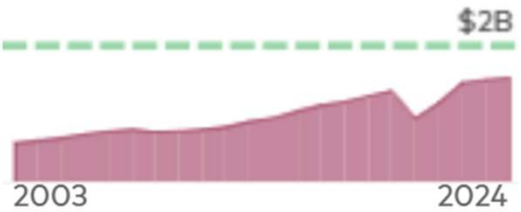
PY: \$14.0B | YoY 0.71% ▲



Tax Revenue

\$1.53B

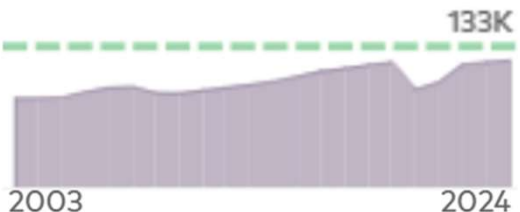
PY: \$1.51B | YoY: 1.46% ▲



Tourism Employment

120K Jobs

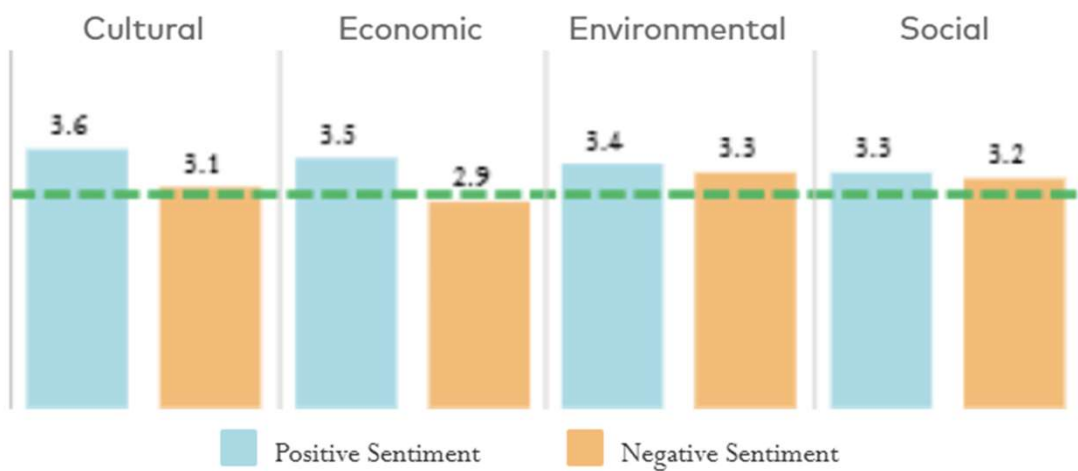
PY: 119K | YoY: 0.70% ▲



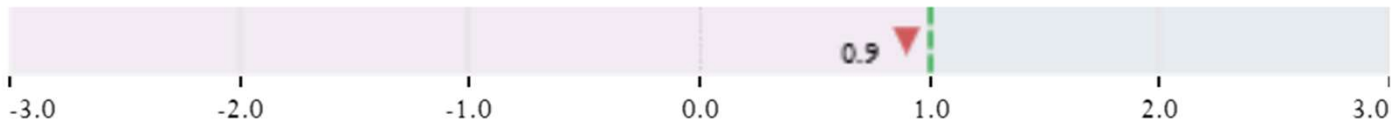
KPI UPDATE

RESIDENT SENTIMENT

Residents' Perceptions of the Value of Tourism



Residents' Support for Tourism Development



KPI UPDATE

VISITOR SENTIMENT



2025-27 SELECTED STRATEGIES

ECONOMY

- Improve Visitor Behavior

EXPERIENCES

- Support Development of Experiences for Underserved
- Assist Communities in Crisis

EQUITY

- Develop a Racial Equity Plan with Partners
- Integrate DEI Agencywide

ENVIRONMENT

- Implement a Tourism Climate Action Plan

THANK YOU

