



Travel Salem “We Can Prove It”

Salem, Oregon

May 2009

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The Role of Tourism

- “Tourism is a job creator on its own but it's also essentially the front door to the rest of the economy.”

Duncan Wyse, President

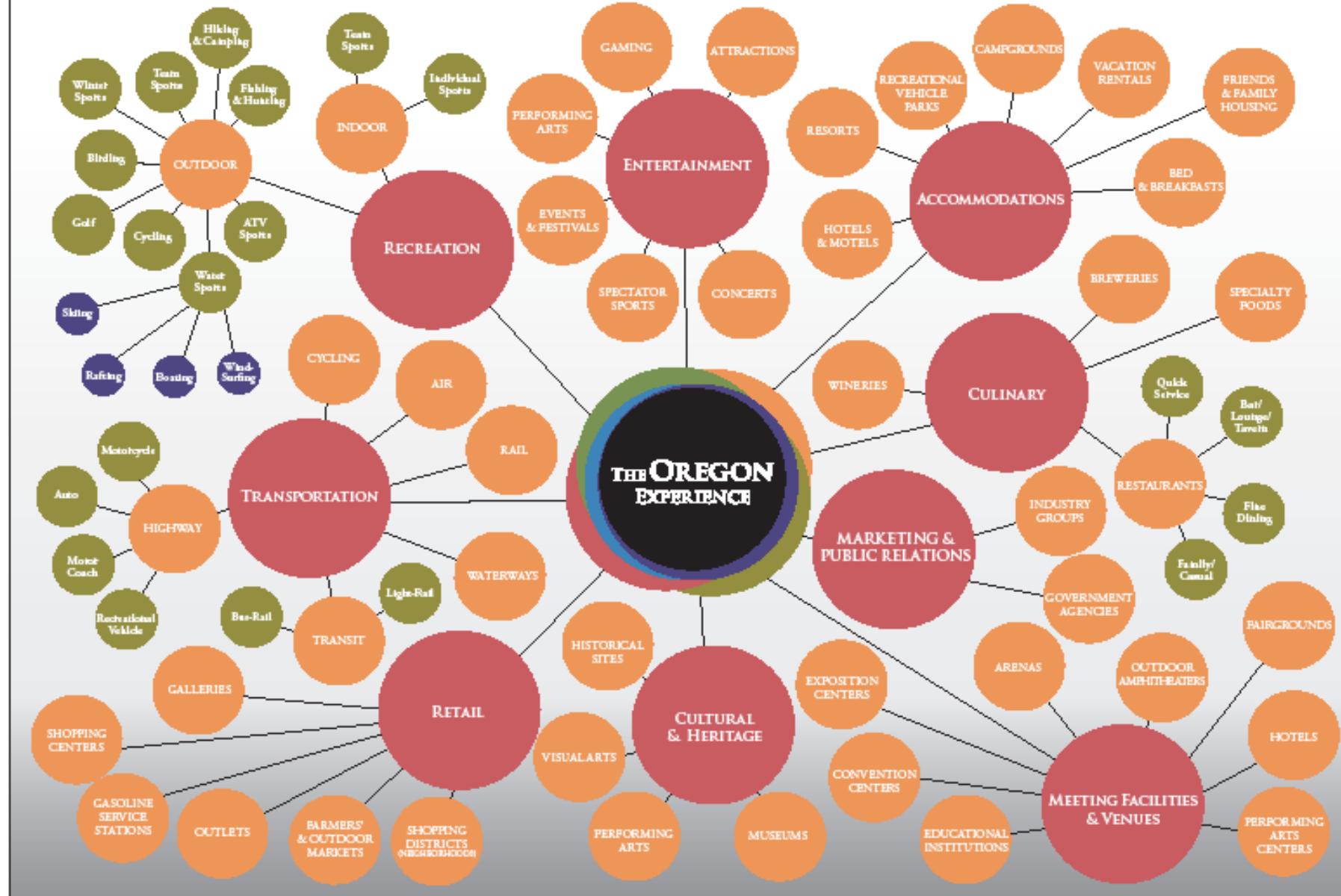
Oregon Business Council

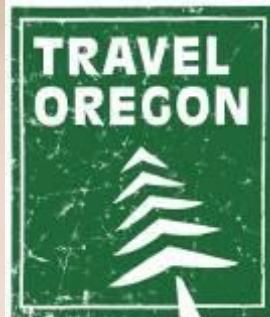
Feb 2009 Tourism/Hospitality Consortium Summit

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TOURISM & HOSPITALITY INDUSTRY CLUSTER MAP

The Industry Cluster map is designed to be a visual narrative of the relationships or categories that make up an industry. It immediately demonstrates the strategic interdependence that defines an industry. The map can be developed on multiple levels to show additional corresponding relationships that support any given sector or the whole industry, (examples: agriculture, real estate development, production and processing services). This specific map has been created to show what makes up the tourism industry from the standpoint of what the consumer experiences and what is actually marketed and sold. It is important to understand that the industry benefits as a whole when each of the categories is healthy and vibrant—it's what makes Oregon a destination point rather than a stop-over point.

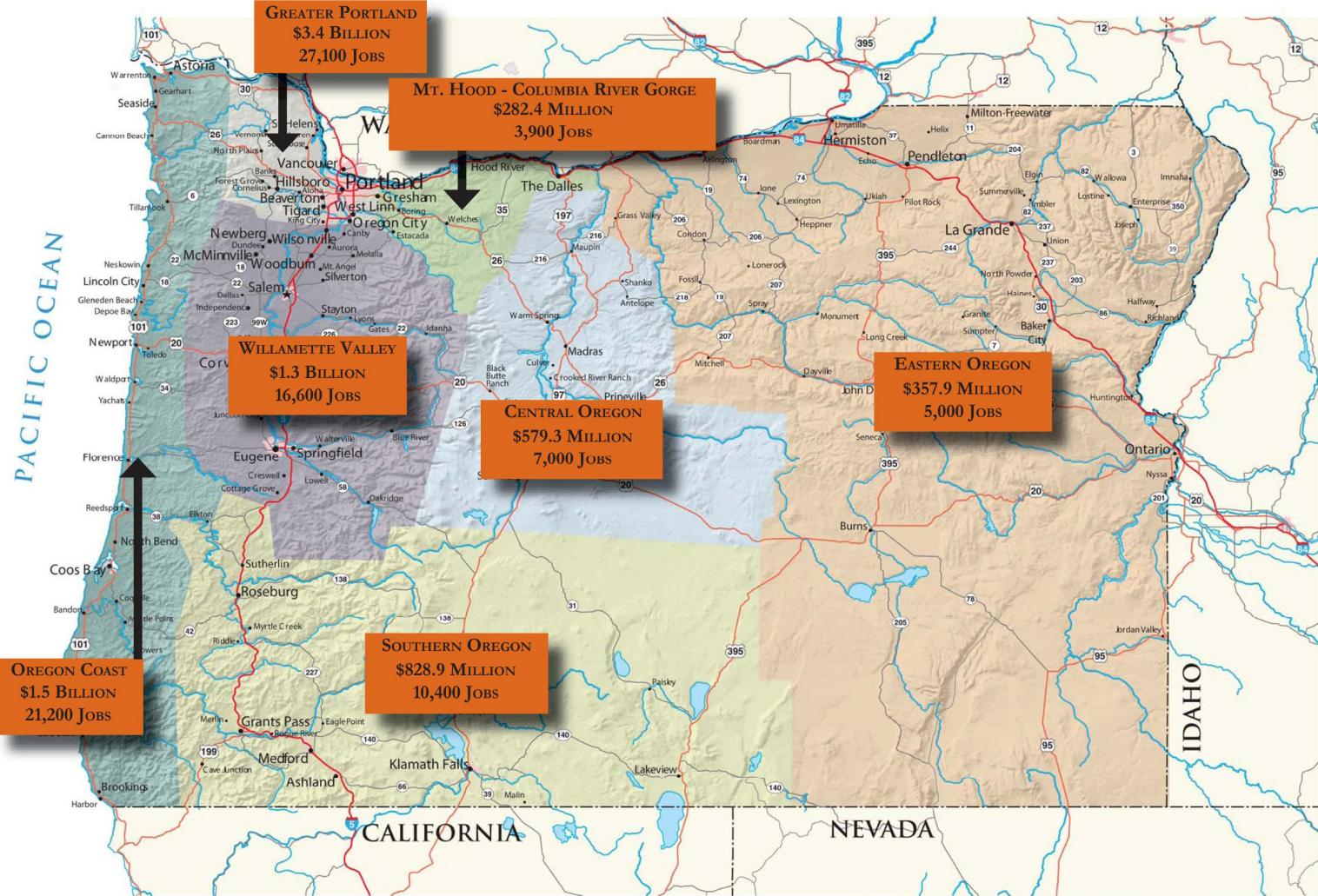




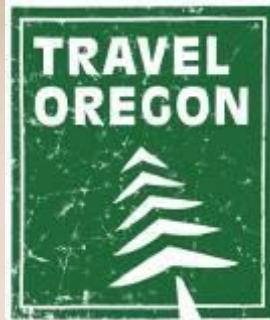
What is Oregon's Tourism and Hospitality Industry?

- \$8.4 billion in travel spending in 2007
- 93,400 direct jobs for Oregonians/40,000 additional indirect jobs
- \$2.1+ billion in payroll and earnings annually
- \$322 million in state and local taxes annually
- Marion County
 - \$357 million visitor spending
 - 3920 jobs/\$74 million earnings
 - \$14.9 million in tax revenues

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Investing in Oregon's Tourism Industry

- Pre-2004, Oregon's tourism budget was:
 - 46th lowest of the 50 states
 - Oregon was losing market share to other states
- Fact: Oregon needed an economic stimulus
 - Nationwide Unemployment 6.2% - Oregon 8.5%
- Tourism Investment Proposal passes in 2003:
 - Statewide: 1% Statewide Lodging Tax implemented in 2004
 - Local lodging taxes:
 - Existing local rates and allocations for tourism were "grandfathered"
 - Increases in local tax rates with at least 70% dedicated to tourism are allowed

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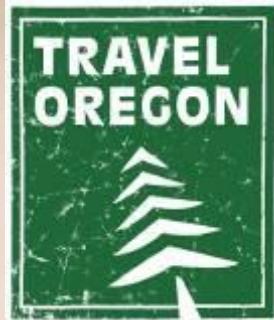


And Today... ...Compared to 2003

- Visitor Spending - Up 28%
- Direct Employment - Up 6%
- Earnings - Up 18%
- State and Local Tax Revenue - Up 30%

- Oregonians Support the Tourism Industry
 - 95% say “Important to Economy”
 - 82% say “Improves Quality of Life”
 - 77% believe industry is “Environmentally Friendly”

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Travel Oregon's Key Objectives

- #1 Maximize the return on public and private investments in tourism.
- #2 Drive year-round travel from visitors in our domestic target audience and lengthen their average stay by encouraging them to be destination-oriented in this state.
- #3 Drive online marketing leisure visitors to Oregon from our primary international target markets: Germany, UK, Japan, Mexico, Canada, and European and Asian feeder markets.
- #4 Provide leadership and support through collaboration with local, regional, national, tribal and private-industry tourism entities.

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DMO's & RDMO's

➤ DMO = Destination Marketing Organization

- A Destination Marketing Organization is an organization whose primary function is to attract visitors to its locale for the purpose of enhancing the local economy through purchase of room nights, food and beverage, retail items, transportation, visitor services, etc. In Oregon, local DMO's work with their Regional Destination Marketing Organization (RDMO) to cooperatively leverage budgets, advertising, services, and information for the benefit of all tourism entities in the region.
- **Examples:** Travel Salem (which works closely with Salem Area Chamber), Albany Visitors Association, Corvallis Tourism

➤ RDMO = Regional Destination Marketing Organization

- Oregon is divided into seven tourism regions. Each region has identified one Destination Marketing Organization (DMO) to act as its Regional Destination Marketing Organization. The RDMO partners with Travel Oregon for the purpose of attracting visitors to their specific region.
- **Examples:** Seven regions shown on previous slides & in your packet. Our region is the Willamette Valley Visitors Association.

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tourism industry Partnering

Local Tourism & Hospitality Industry

(Business, Organization, Individual)

Example: Salem-Keizer Volcanoes



Local Destination Marketing Organizations

(DMO)

Example: Travel Salem



Regional Destination Marketing Organizations

(RDMO)

Example: Willamette Valley Visitors Association



Travel Oregon

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Domestic Consumer Marketing

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The Results: ROI

- Most successful campaign we've ever run
(32% more efficient than last campaign)
- Every \$1.31 spent on media generates a new trip to Oregon
- Every \$1.00 spent on media generates:
 - \$159 in visitor spending
 - \$6 in new state and local tax revenue

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Source: Longwoods research commissioned by Travel Oregon





Seven Regions

- \$11.5 million collected in 2008
- Up to 15% goes to the regions
 - 1.65 million total in 2006
 - 1.78 million total in 2008
- **Breakdown of dollars that each region received for their 2008/09 Regional Cooperating Marketing Programs:**

- Mt. Hood/Columbia River Gorge	\$66,113
- Eastern Oregon	\$74,888
- Central Oregon	\$163,240
- Southern Oregon	\$176,509
- Willamette Valley	\$219,254
- Oregon Coast	\$455,717
- Metro Portland	\$627,904

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OUTDOORSY STUFF

TIMBERLINE LODGE, MOUNT HOOD

PROVE YOUR LOVE

EAST TWO REGIONS
REGION TOUR

FOODIE STUFF

Includes wineries, brew pubs, cafés and crab shacks all across the state



Foodie Stuff



Outdoorsy Stuff

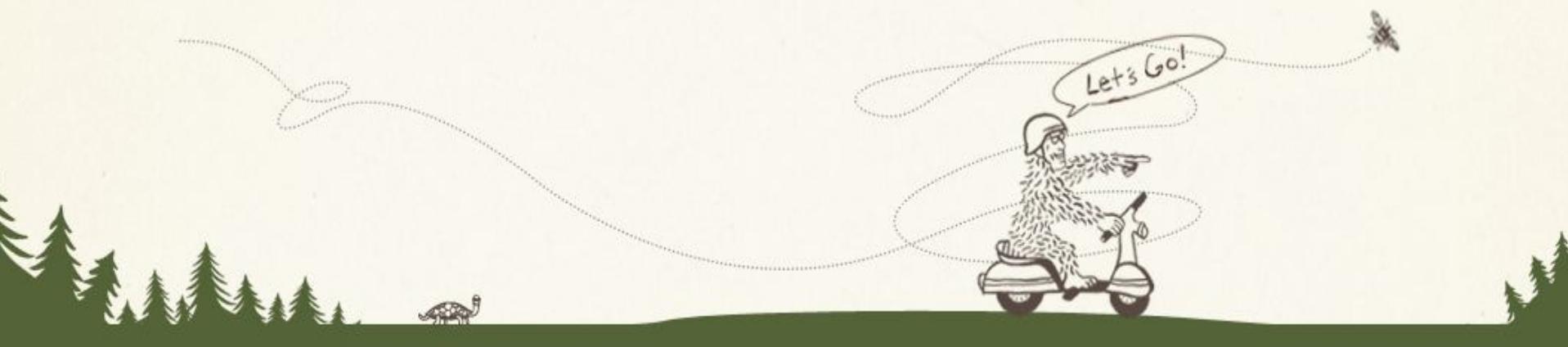


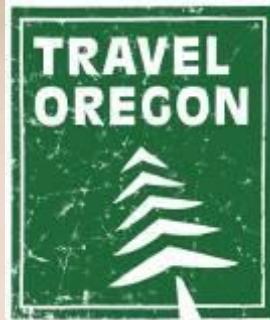
Events



Landmarks

Start the Challenge! 





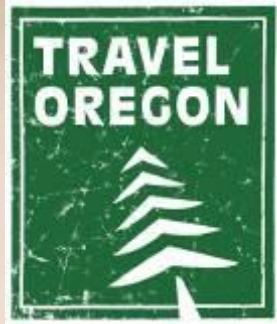
International & Domestic Travel Trade Department

- In-country representatives in major markets
- Public relations
- Research trips
- Tour operators/Receptive tour operators
- Travel agent education
- Trade shows
- Cooperation with air carriers

- Consumer Awareness:
 - Travel Channel Europe
- "Oregon Uncovered" Series – 15 episodes, 48M households across Europe.



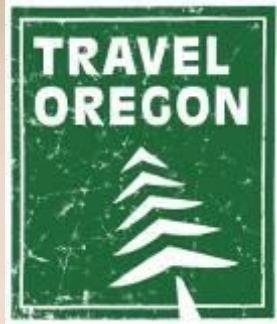
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Tourism Development

- Industry Communication
- Niche Product Development
- Rural Tourism Studios
- State Welcome Centers
- Scenic Byways
- Governor's Conference on Tourism
- Policy & Research
- Tourism & Hospitality Consortium
- Q Care Customer Service Training
- GeoTourism / National Geographic Project

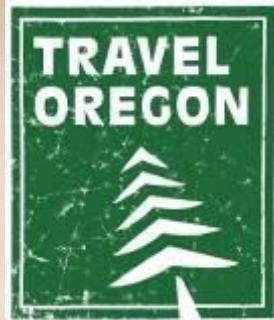
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Tourism & Hospitality Consortium

- Mission: The tourism/hospitality industry seen as a primary socio-economic driver of Oregon's economy
- "What's Good For Tourism and Hospitality is Good for Oregon and what's Good For Oregon is Good for the Tourism and Hospitality Industry"

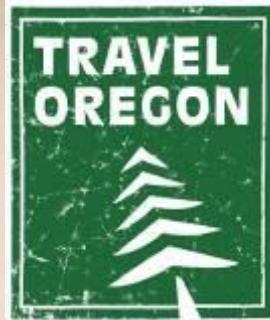
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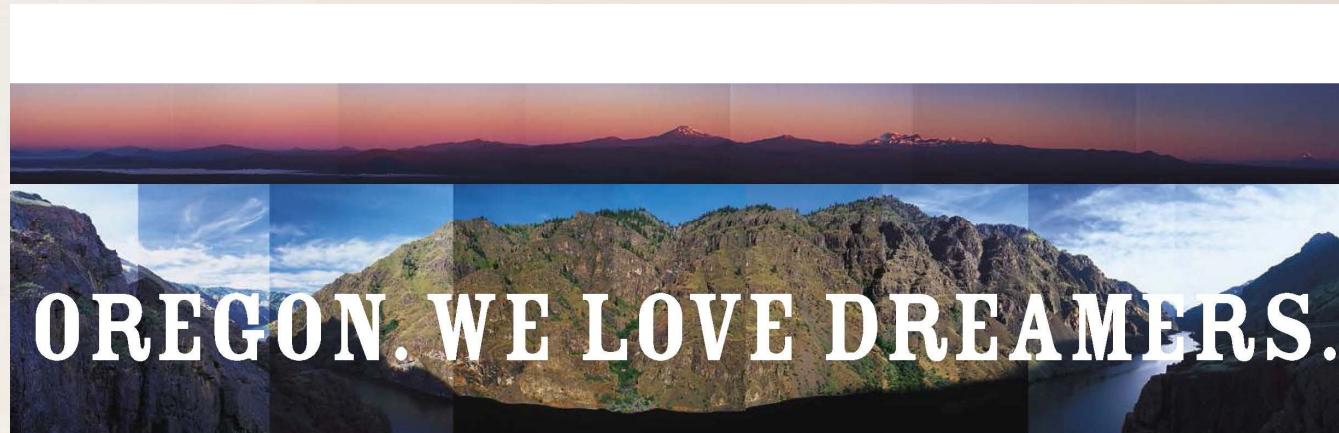
Tourism & Hospitality Consortium

- Consortium Steering Committee
 - Alana Audette, COVA
 - Bill Cross, OACVB
 - Matt Garrett, Director, ODOT
 - Tim Wood, Director, State Parks
 - Steve McCoid, CEO, Oregon Restaurant Assn.
 - Jeff Hampton, CEO, Oregon Lodging Assn.
 - Kari Westlund, CEO, CVALCO
 - Cheryl Gribskov, Director, Travel Information Council
 - Jeff Miller, Travel Portland
 - Roy Elicker, Director, ODFW
 - Katy Coba, Department of Agriculture
 - Todd Davidson, CEO, Travel Oregon

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Oregon is the Priority



In a country that's grown old and become set in its ways, where there are ways that things are done and there are people who do the things that are done and that's that, Oregon decides her beaches will not be turned into property wars between the rich. Oregon decides her cities and her forests will live in harmony.

In a country where "public" has become the code word for "poor," Oregon stubbornly adheres to the original intent of public transportation being for the *public*. As in everyone. Where on a bus, a man in a suit sits next to a man in dreadlocks. And occasionally, they strike up a conversation about what needs to be done about the

public schools because both of their children go to public schools.

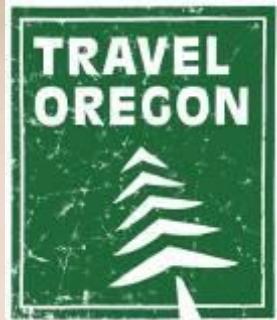
In a country where everything was just getting swept into a landfill, Oregon decided its mountains and rivers and valleys and deserts and coast were all much too important to fill with garbage. And so Oregon found a better way to deal with its waste.

In a country where OK is too often *OK*, Oregon is that troublemaker in the back who keeps piping up and challenging the status quo if there might be a better way. But of course if you asked Oregon,

Oregon would say it's something different. Oregon would say it is a refuge for idealism. Where it's still possible to grow the best hazelnut. Where it's still possible to turn your idea into a ten-billion-dollar company. Where it's still possible to truly enjoy life. Where possibility is still a real possibility. And maybe, if Oregon keeps questioning and keeps challenging, Oregon just might change the minds of a few, who just might influence a few more, who just might change the world for the better.

Why not?

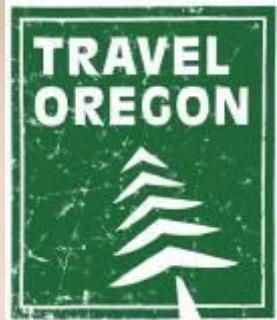
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Consortium Timeline

- 2003 Passage of Tourism Investment Proposal
- Initial Group Meets in 2004
- 2005 Announcement of Consortium
- 2006 Strategic Plan Adopted
- 2007 Perception Survey/Collateral
- 2008 Strategic Plan Revisited
- 2008/09 Town Halls/Summit

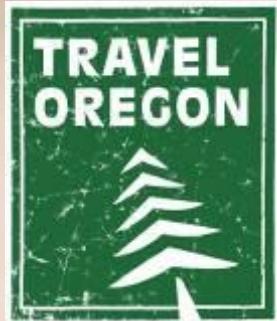
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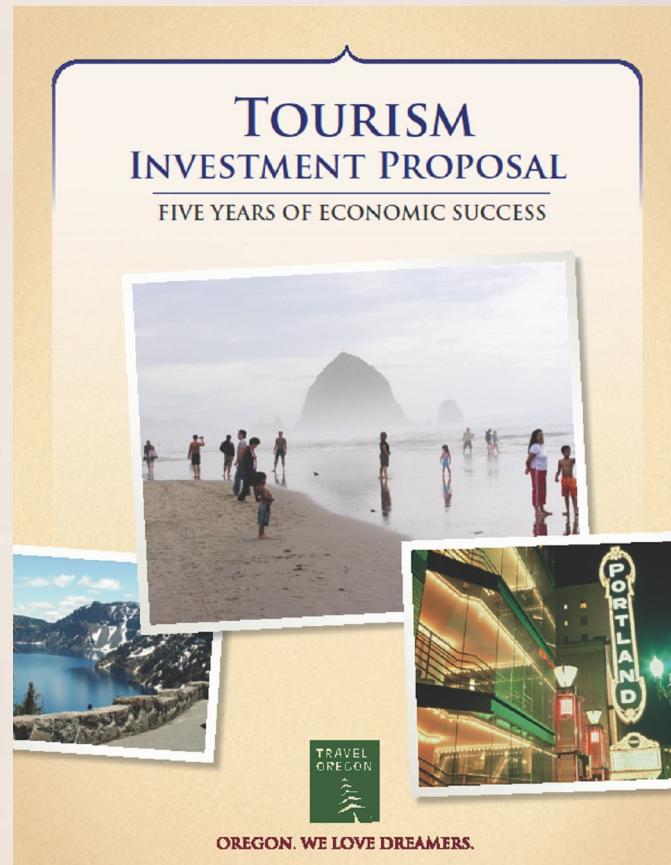
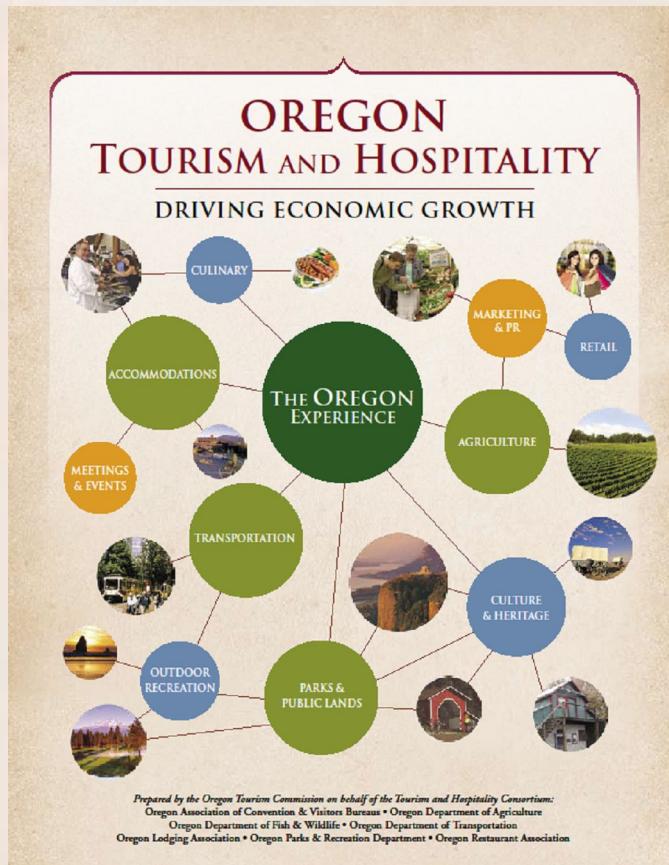
Strategic Plan

- Four Imperatives
 - Clearing House
 - Leadership
 - Communication
 - Oregon Product & Experience

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Messaging Collateral



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Perception Survey

OREGON TOURISM & HOSPITALITY

AN INDUSTRY EMBRACED ACROSS THE STATE

OREGONIANS OVERWHELMINGLY SUPPORT THE
TOURISM AND HOSPITALITY INDUSTRY

77%
ENVIRONMENTALLY FRIENDLY

82%
IMPROVE QUALITY OF LIFE

95%
IMPORTANT TO ECONOMY

For most Oregonians, tourism helps reflect the values that we hold dear.¹ Tourism is a sustainable industry that enables us to showcase our state's natural beauty, our rugged and creative spirit, and our respect for the environment and one another.

WHAT'S GOOD FOR TOURISM IS GOOD FOR OREGON

In 2003, when Oregon was facing one of the highest unemployment rates in history, the Oregon State Legislature and Governor Ted Kulongoski signed into law and enacted the Oregon Tourism Investment Proposal. The investment in Oregon's future has paid off!

\$1 spent on state marketing = \$159 in visitor spending and \$1 spent on state marketing = \$6 in state and local tax revenue.²

Tourism and hospitality industry members in every region of the state collaborate on dozens of strategic marketing programs every year. These and other efforts brought more than 21 million overnight visitors to Oregon—for an average stay of four nights.

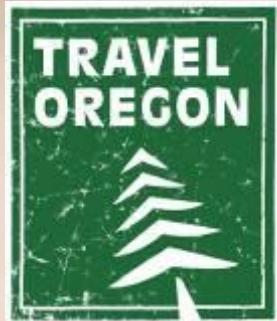
Continued dedication to the state's tourism industry, will keep this powerful economic engine running strong.

¹ Oregon Tourism Public Perception Survey, The Nelson Report, 2007.
² Advertising Accountability Study, Longwoods International, 2007.

DIRECT TRAVEL SPENDING & JOBS CREATED

Region	Direct Travel Spending	Jobs Created
Portland	\$1.5 Billion	21,200 jobs
Central Oregon	\$3.4 Billion	27,100 jobs
Southern Oregon	\$1.5 Billion	16,600 jobs
Northwest	\$282.4 Million	3,900 jobs
Southwest	\$579.3 Million	7,000 jobs
East	\$357.9 Million	5,500 jobs
Total	\$850.9 Million	10,400 jobs

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Initial Roundtable - Portland

Business & Tourism
Travel & Tourism as it relates to the business environment of Oregon

Oregon Business and Travel Oregon proudly present the Travel & Tourism Roundtable Event of 2008. The roundtable event will be an open conversation about the interconnections, dynamics and perceptions that exist between tourism and businesses in Oregon. The roundtable discussion will be featured in a stand-alone supplement to Oregon Business. The supplement will be distributed along with an upcoming issue of Oregon Business to its readership of over 50,000 business executives and government leaders.

Possible Topics:

- What is Travel Oregon's role in branding the state and are they representing the values of our businesses and public?
- Is tourism embedded in business directly and indirectly? What are some examples?
- Does hospitality play an important role in developing good employees in general?
- How can business and tourism better interact?

Possible Sector Representation by Invitations Only:

Transportation	Manufacturing
Tourism	Lodging
Retail	Culinary
Finance	Public Agencies
Construction	High Tech
Entertainment	Utilities
Recreation	Elected Officials

For general information please contact Anna J. Marketing Manager for M&S America, KATE GOLDBRICK KATE@GOLDBRICK.COM, 503-461-8641



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Oregon Business Magazine



**IMPACT
OREGON**

business. tourism.
(AND EVERYWHERE THEY MEET.)

PLUS
ADDING IT ALL UP | BRINGING IT ALL HOME

A SUPPLEMENT TO OREGON BUSINESS MAGAZINE

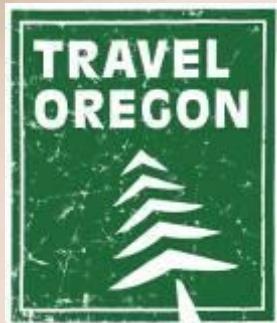
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Regional Roundtables



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Roundtable Summaries

JACKSONVILLE NOVEMBER 20, 2008

Panelists:
Bob Hackney, Southern Oregon Regional Economic Development, Inc.
Bob Hackney, marketing manager, Southern Oregon Shakespeare Festival
Jeff Hampton, executive director, Oregon Lodging Association
Carolyn S. Hill, chief executive officer, Southern Oregon Visitors Association
Anne Jenkins, senior vice president, Medivac Visitors & Convention Bureau
Scott West, chief strategy officer, Travel Oregon
Charles Willis, general manager, Xanterra Parks & Resorts/Crater Lake Lodge

The tall brick walls of Jacksonville's historic Redmen's Hall provided the backdrop for a spirited discussion on the ties between business and tourism, and what today's visitors hold for them both. About 50 people from a wide range of businesses attended the Town Hall on Nov. 20, hosted by the Southern Oregon Visitors Association and Travel Oregon.

"Town Hall is a great name for what we are doing," said moderator Carolyn S. Hill, chief executive officer of the Southern Oregon Visitors Association. "Traditionally, a town hall is when citizens could come together and talk about common issues. And that's what we will be doing—talking about the interdependence between industries."

The role of tourism
Jeff Hampton, executive director of the Oregon Lodging Association, offered a quick glimpse at the effect the tourism and hospitality industries have on the state's economy: \$8.3 billion in direct impacts, with overnight visitors accounting for half of that spending.

Tourism has an effect on virtually every business sector, said Scott West, chief strategy officer for Travel Oregon. "A tourism perspective when doing things like recruiting businesses plays into our entire picture."

In this region, tourism and economic development leaders are used to working together to make visitors want to come. The Southern Oregon Lodging team points its resources to promote the region as a great place to locate, explained Tim Fox, executive director of SORED. "A great living environment is actually parallel with a great business environment, so we are making those two things work together."

"We need to articulate to the voters where we are on this issue," Fox said.

Legislative Issues
Panelists agreed that the gas tax immediately took center stage. Panelists agreed that, despite economic conditions, transportation issues will move forward in the 2009 Legislature. "We are contributing to the economic health of the state by investing in the infrastructure," Fox said. "That has a dramatic impact on our ability to compete in the global market."

The imminent increase in Oregon's minimum wage also sparked a spirited discussion. A restaurant owner in the audience predicted labor cuts and shorter hours of operation at some businesses, and the demise of others.

"One thing that hinders what we do here is the higher minimum wage," said Charles Willis, general manager of Crater Lake Lodge. "That has a tendency to block large corporations from coming to state."

Panelists agreed that the minimum wage issue is of huge importance to the tourism industry and one that is difficult to educate the public about. "I don't think citizens understand the wealth brought to Oregon by visitors," Fox said. "The tourism industry is a wealth generator and that \$8 billion (in direct impacts) represents a lot of small businesses, which employ 60-70 percent of the workers in Oregon."

Anne Jenkins, senior vice president of the Medivac Visitors & Convention Bureau, pointed out that the minimum wage issue is of huge importance to the tourism industry and one that is difficult to educate the public about. "I don't think citizens understand the wealth brought to Oregon by visitors," Fox said. "The tourism industry is a wealth generator and that \$8 billion (in direct impacts) represents a lot of small businesses, which employ 60-70 percent of the workers in Oregon."

EVERYWHERE THEY MEET.

"I can't think of any industry in my region that's not touched by tourism. Everything is interconnected, and that's why it is so critical that each one of us understands how to work together."

Anne Jenkins
Medivac Visitors & Convention Bureau

Business + **EVERYWHERE THEY MEET.** **Tourism.**

Photo: Photos by Steve Lohman for Travel Oregon.

LINCOLN CITY DECEMBER 12, 2008

Panelists:
Joe Aher, Bureau of Land Management
Michelle Duarte, Whidbey Guest Habitat
Doug Hunt, Umpqua Bank
Caroline Morris, Oregon Coast Visitors Association
Rebecca Morris, Oregon Coast Visitors Association
Terry Thompson, Lincoln County Commissioners
Scott West, chief strategy officer, Travel Oregon

Baby Boomers continue to retire, you will have fewer and fewer people coming into the workforce to replace them."

The ethnicity of the coast population is also changing. One audience member predicted that children of Hispanic heritage will soon make up 50% of Lincoln County school enrollment. "We're changing age-wise, but we are also changing culturally and that's going to be a challenge for us," he said.

Attracting and retaining employees is made more difficult with the lack of healthcare, day care and affordable housing, problems that affect the entire coast. Fifteen years ago, pointed out Joe Aher of the Bureau of Land Management, the difference between median home price and median income was 120%; today it's 400%.

"In Lincoln County, the population has become heavily weighted toward retired individuals. As the Baby Boomers continue to retire, you will have fewer and fewer people coming into the workforce to replace them."

Doug Hunt
Umpqua Bank

Sustainability and eco-tourism
The increasing popularity of eco-tourism is having a significant effect on coastal venues. "People don't want to be entertained any more, they want to be educated," Aher said.

Changing demographics
While the number of people living on the Oregon Coast has not changed appreciably, the make-up of the population has. That has profound implications for the coastal economy. "In Lincoln County, the population has become heavily weighted toward retired individuals," said Doug Hunt of Umpqua Bank. "As the people who live here get older, the resources of the South Coast have been used to attract the eco-tourists, who are not as affected by that."

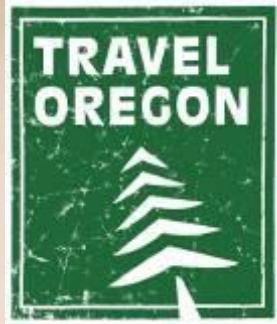
Photo: Photos by Steve Lohman for Travel Oregon.

REBECCA MORRIS
Oregon Coast
Visitors Association

MICHELLE DUARTE
Whidbey Guest
Habitat

GABRIELLE MCENTEE-WILSON
Mo's Enterprises

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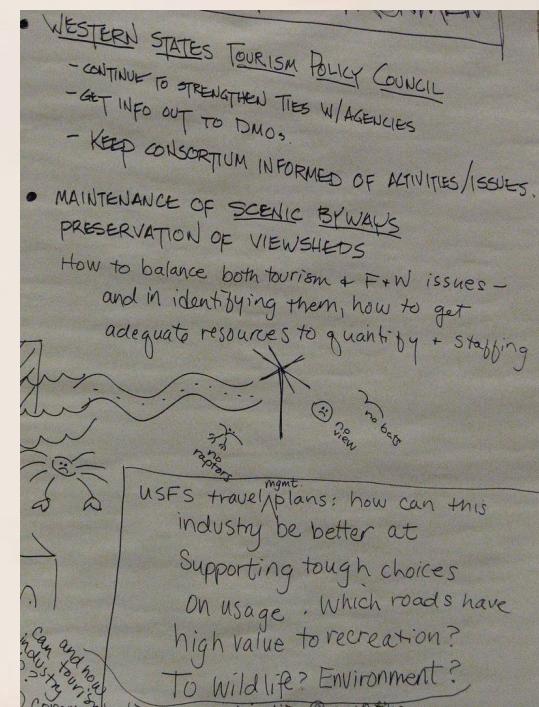
Strategic Plan Reviewed

- Randy Harrington Facilitated
- Review of Initial Plan
- Findings:
 - Protect Room Tax Funding Base
 - Protect Local Funding Obligations
 - Address Local and State Issues
 - Tourism is Success – More Recognition
 - Offer Solutions – Not Always \$'s

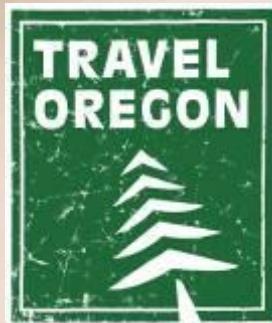
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Consortium Summit



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Summit Outcomes

OVERVIEW: Transportation and tourism are intrinsically linked in Oregon. The state's reputation for beautiful scenery and outstanding recreation has led to a marked increase in tourist demand for activities such as bicycling, driving tours and hiking excursions. The state is well known for its light rail service to Portland International Airport, which has direct connections to major hubs across the country, plus non-stop international flights to five countries. Amtrak also operates several popular runs.

CHALLENGES & OPPORTUNITIES: Oregon's tourism industry is facing challenges such as the uncertain economy and rising fuel prices. The state's transportation system is also under pressure to accommodate more visitors. The state's transportation infrastructure, including its roads and bridges, is aging and in need of repair. The state's tourism industry is also facing challenges such as the increasing cost of travel and the need to compete with other states and countries for tourists.

STRATEGIES: The state is working to develop a comprehensive tourism strategy that includes improving transportation infrastructure, promoting outdoor recreation, and developing new tourism products and services. The state is also working to improve its tourism marketing efforts, including developing a statewide tourism website and creating partnerships with local tourism organizations.

OUTCOMES: The state's tourism industry is expected to continue to grow, driven by factors such as the state's natural beauty, its strong outdoor recreation opportunities, and its growing reputation as a destination for adventure tourism. The state's transportation infrastructure is also expected to improve, making it easier for visitors to get around and explore the state's many attractions.



DOMESTIC CONSUMER MARKETING

An important step in building a thriving tourism economy is getting visitors to actually visit Oregon. Consumer marketing programs are key in building the state's reputation as a premier vacation destination. Travel oriented consumer marketing units engage consumers in the Oregon brand, motivate them to actively seek more information, and make planning an Oregon vacation fun. This collaborative strategy has built momentum, resulting in four years of significant growth in response rates.

Challenges & Opportunities: The economy is an issue that the tourism industry is facing consumers to think carefully before spending their vacation dollars. Cost-saving strategies include making last-minute bookings in search of deals; traveling closer to home; taking shorter trips; and postponing trips.

The consumer: Travelers are seeking value-based, experiential destinations—unique, authentic and meaningful interactions with the people and the culture of the places they visit.

The media: An increase in media channels, with audiences ranging from five to five million, mean consumers are becoming accustomed to accessing content wherever and whenever they want to.

Strategies: Nimble tactics: Successful marketing campaign will create flexibility in the budget—contingency funding for tactical short-term initiatives to respond to the changing environment.

Expanded offerings: The trend toward education-based travel offers businesses an opportunity to expand or launch new visitor offerings to include eco-tourism, geo-tourism, and value-tourism elements.

A focused message: Continued investments in all things digital, including enhancing websites with engagement tools such as multimedia content. Other strategies include providing branded environments (such as GoSeeOregon.com) but also leveraging social media tools that already exist (such as TripAdvisor.com) and giving consumers tools to tell their own travel stories, such as blogs.

####

An Inside Look:

"People don't want to be entertained any more; they want to be educated," says Joe Adcox, Bureau of Land Management. Half of the Oregon Shakespeare Festival's ticket sales are now online, and many sales result from week-of-show e-mails. "We have to be more flexible than we've ever been to attract new patrons," says marketing director Bob Hackett. "We need to reach people in a way that works for them."



2009 TOURISM & HOSPITALITY CONSORTIUM INDUSTRY SUMMIT REVIEW

More than 70 industry leaders from throughout Oregon listened intently as Kent Werhord, chair of the Oregon Tourism Commission, finalized plans for devoting an entire day to discussing issues of importance to the tourism industry—and then remained there until

"These are very remarkable times, with big issues on the horizon," Werhord told a full conference room at the Salem Conference Center recently. "The time is ripe with great opportunity, lots of achievement and significant risk, as sweeping policy changes are introduced at the state and national levels."

"Our tourism is created to identify and support a leadership network, and we all want to engage in the responsibilities of that leadership."

—Kent Werhord, chair, Oregon Tourism Commission

"Ours is a very complex industry and now is the time to improve understanding of its complexities. The people in this room can do a collective powerhouse of energy—darn you and I hope you do it," Werhord said.

THE ONE VOICE POTENTIAL: The annual meeting of the Tourism & Hospitality Consortium Industry Summit was convened to discuss the若干 topics in a challenging time when the tourism industry is changing rapidly, consortium members have the opportunity to share management practices, and speak with one voice on critical issues as the industry develops, grows, and helps shape Oregon's future. "I really feel that the vision of the consortium summit will solidify with what we do today," Werhord said.

In his welcoming remarks, Duncan Wyrne, president of the Oregon Business Council, urged listeners to "think boldly" about how best to bring a shared image of Oregon to the world for the future. "Tourism is a job creator in its own," he said, "but it's also essentially the first door to the rest of the economy."

PUTTING IT INTO PERSPECTIVE

The summit schedule was built around discussion of six topics of importance to the industry today: transportation, land use, public lands and environment, marketing, energy and the workforce. The topics were identified during a series of regional tourism and hospitality "town halls," an ongoing discussion sponsored in part by the Tourism & Hospitality Consortium.

"These topics have permeated through the town halls we've had so far," said Todd Deeschen, CEO of Tavel Oregon, as he explained the day's schedule: a brief overview of each topic by a subject matter expert, followed by group discussions to explore the issues in depth.

David Shesley, director of marketing research for the U.S. Travel Association, set the stage for the day's discussions with his keynote talk on the state of the industry. His title slide was met with a collective groan from the audience. "The National Outlook...Look Out!" he said.

"The major point here is, if you didn't like 2008, you're not going to like 2009," he said. Some things to look out for: the downward trend in business travel is intensifying, the outlook for air travel is up in the air, leisure travelers are aggressively looking for value, and the trend to travel to foreign destinations is continuing.

For its part, Oregon's tourism industry is doing well. After the annual Marion County Outlook Forum was held in Oregon last October, attendees gave Portland a "phenomenally high" location score, Shesley said. And on a brand-new website for sustainable tourism,

www.visitoregon.org, Oregon has more case studies posted than any other state.

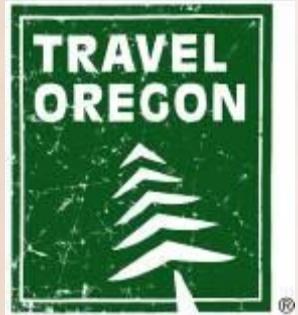
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What's Next

- Plan Development Past 2009 Legislature
- Stronger Collateralization of Messages
- More Local Outreach – Town Halls
- Calendar of Industry Events/Participation

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Thank You

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