

OREGON'S RESTAURANTS

BUILDING CAREERS, SERVING CUSTOMERS,
STRENGTHENING OREGON'S ECONOMY.

OREGON *Restaurant* ASSOCIATION

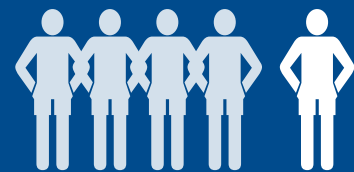
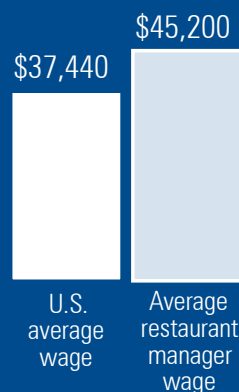
Building Careers

Oregon's restaurants are the cornerstone of the state's jobs and employment, providing career opportunities for more Oregonians than any other private sector employer.

- Restaurants are Oregon's largest private sector employer, providing jobs for 120,000 people—one in 14 payroll workers in the state.
- Nearly half of all adults have worked in a restaurant during their career.
- Nearly 80 percent of restaurant employees earn above minimum wage—and nine percent earn greater than Oregon's per-capita income.
- Restaurants employ more minority managers than any other industry in America.
- One in four Oregonians found their first job in a restaurant.
- One in four hospitality businesses are owned by African-Americans, Hispanics or Asian-Americans—higher than the average for all businesses.

Sources: U.S. Department of Labor, U.S. Census Bureau and National Restaurant Association.

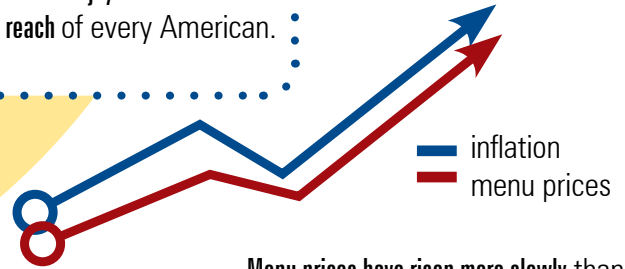
Restaurant managers and many other restaurant employees earn higher than average wages - the average restaurant manager earns more than \$45,000 annually.



Four out of five salaried restaurant employees began their careers on hourly wages.



Once a luxury only the very wealthy could afford, dining out is now **an enjoyable convenience within the reach** of every American.



Menu prices have risen more slowly than the inflation rate over the past quarter century.

Serving Customers

Today, eating out has become so cost-effective that the typical Oregonian consumes an **average of 5.3 meals or snacks prepared away from home each week.**

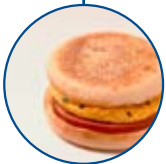
- Oregon's restaurants are committed to serving our customers by investing in our industry and its people and giving back to our communities.
- There are now more than 9,000 restaurants in Oregon.
- Almost half of all adult Oregonians are patrons of a restaurant on any given day.
- Greater diversity on the menu is the biggest trend in restaurant dining.
- The average American worked an hour and a half to pay for a popular lunchtime sandwich in 1940. Almost 60 years later, the average American worked fewer than nine minutes to pay for one.
- Nine out of ten restaurants make charitable contributions, over half of which are in excess of \$500 annually.
- "Giving back to the community" is the most important reason cited by restaurateurs for participating in community relations activities.

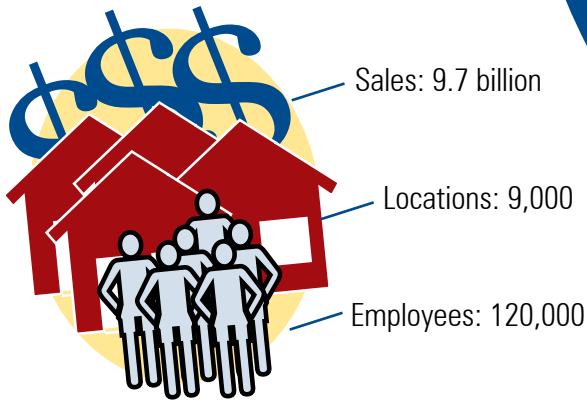
Sources: U.S. Department of the Treasury, U.S. Department of Commerce, Federal Reserve Bank of Dallas, National Restaurant Association.

Strengthening Oregon's Economy

Every day in Oregon, restaurants touch people's lives for the better. Almost half of all adult Oregonians are patrons of a restaurant on any given day.

- Restaurants employ more than 120,000 Oregonians, plus 48,000 in supporting businesses. Only local government employs more people than the restaurant industry.
- The restaurant industry is made up of small businesses. Nearly three-quarters of all restaurants in the state are single owner-operator with fewer than 20 employees.
- These businesses have a big impact on other industries. Every dollar spent in restaurants generates an additional \$1.07 in sales for supporting businesses.
- By the numbers: Oregon's 9,000 restaurants posted sales of \$4.7 billion in 2005 and have a total overall economic impact of \$9.7 billion in Oregon—7.6 percent of the Gross State Product.





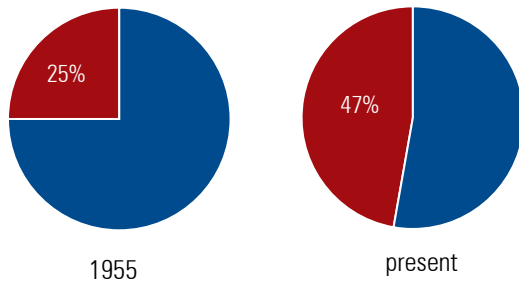
THE IMPACT

The Cornerstone of Travel and Tourism

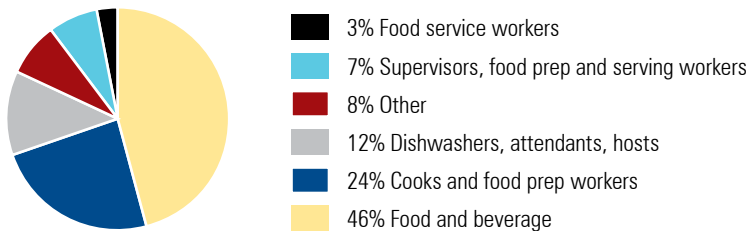
Travel and tourism has a big impact on the restaurant industry. Travelers and visitors account for between 15 percent and 30 percent of sales at restaurants. Tourism is one of our state's largest industries and restaurants are the biggest component.

Restaurants account for the largest share of economic activity in travel and tourism; 23% of the tourist dollar is spent on food.

Restaurant Industry Share of the Food Dollar



Restaurant Industry Occupations



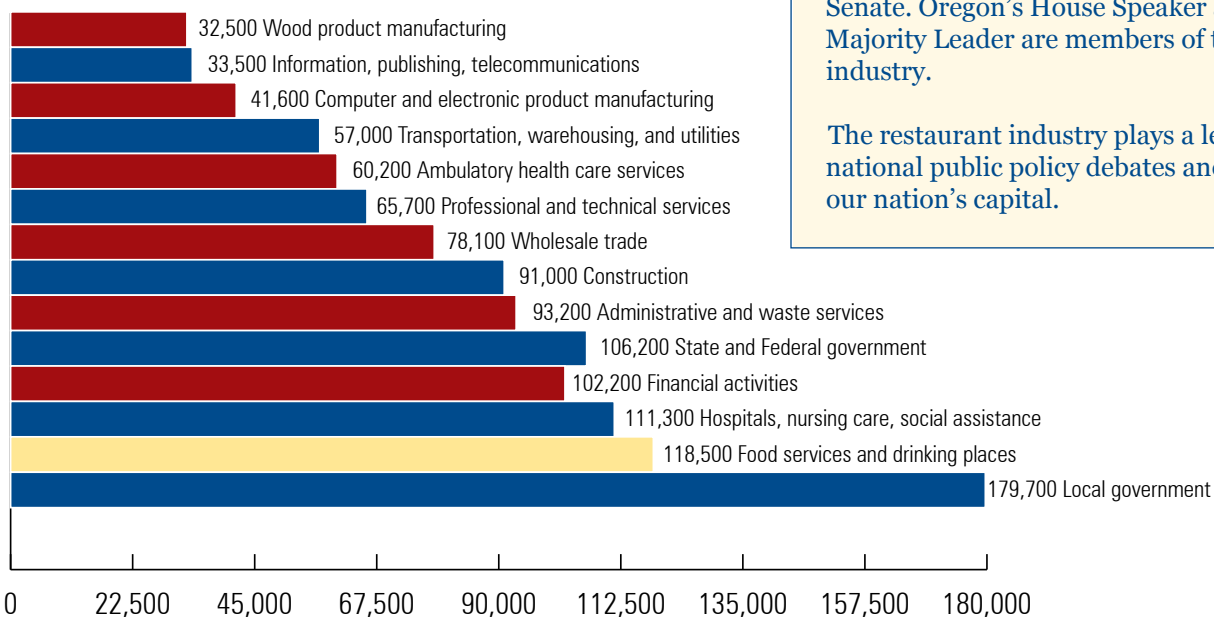
At the Public Policy Table

Acknowledged as one of the most powerful political forces in the state, Oregon's restaurant industry promotes a pro-business agenda on critical issues like minimum wage, labor issues, and local government control over business.

Members of the hospitality industry are community leaders. More than fifteen industry members hold elected offices in Oregon—city councils, county commissions, judges, the Oregon House and the Senate. Oregon's House Speaker and the House Majority Leader are members of the hospitality industry.

The restaurant industry plays a leading role in national public policy debates and is a major force at our nation's capital.

2005 Oregon Industry Employment Comparison



OREGON *Restaurant* ASSOCIATION

STRATEGIC PLAN

Recognizing that Oregon's restaurants are the cornerstone of careers, communities, and the state's economy, the Oregon Restaurant Association Board of Directors adopted the following strategic plan on April 5, 2005.

Vision: To position hospitality as one of the primary Oregon industries that drive the future of the state.

Mission: To be the catalyst for starting an influential circle of hospitality industry leaders, thus positioning hospitality as the cornerstone of Oregon's economy, its communities and employment base.

Primary Objective: Establish and then maximize the visibility and influence of Oregon's hospitality industry.

Primary Strategies

Strategy #1: Establish an active network of 500 industry leaders, including "self-selected" leaders and those who have a substantial vested interest in Oregon's hospitality industry.

- Each ORA board member to identify leaders inside of Oregon's hospitality industry with whom they have a relationship or with whom they have the ability to create a relationship.
- Create an organized communications platform that establishes a solid and consistent link to identified members of the Oregon Hospitality Leadership Network.
- Develop a formal invitation process for engaging the identified influencers. Leaders are asked to accept and commit to being informed, inform each other, "evangelize" the message: "If it's good for hospitality, it's good for Oregon," and respond to requests for action and assistance.
- Establish and then manage an industry-wide database of all identified industry leaders and influencers who have opted into the Hospitality Leadership Network.
- Establish a method for tracking and reporting on key developments that result from the influence of the newly formed Hospitality Leadership Network.
- Create an accessible forum, a method for communication, which will keep people consistently engaged.

Strategy #2: Establish an alliance of industry organizations that can play both a support and driver role in positioning the hospitality industry at the forefront of policy makers' and opinion shapers' minds.

- Engage the leadership of prospective alliance organizations who are dependent upon Oregon's hospitality industry.
- Hold a series of forums within each alliance partner organization to introduce the vision and mission to staff members, thereby enrolling their support and focus.
- Identify industry leaders within each alliance organization who will accept and commit to being part of Oregon's Hospitality Leadership Network.
- Create and organize an event where the identified industry leaders from all the alliance organizations can gather.

Strategy #3: Identify the centers of influence in Oregon's communities and work to populate them with members of the Hospitality Leadership Network.

- Identify Oregon's 10 MSA urban centers.
- Develop an Oregon Power Map that reflects all primary centers of power and influence within of the identified MSA urban centers, including elected officials.
- Solicit identified hospitality industry leaders from the Power Map for participation in the Hospitality Leadership Network.
- Plan and hold an event specifically for Hospitality Leadership Network participants who hold positions on the Power Map.

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8565 SW Salish Ln Ste 120
Wilsonville OR 97070
p:503.682.4422 www.ora.org