



TRAVEL



OREGON

State of Travel in Oregon
House Committee on Economic Development, Small
Business, and Trade

5.30.24

Kenji Sugahara

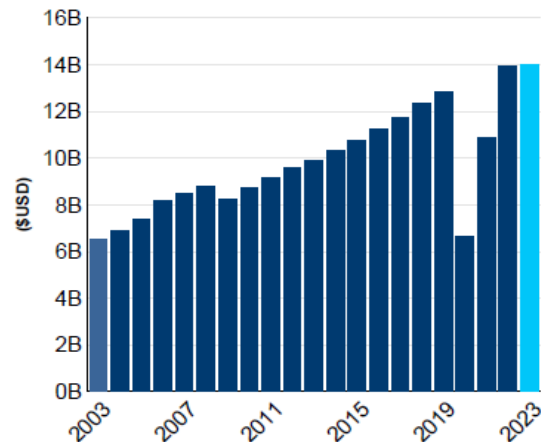
About Travel Oregon

- Our vision is that Oregon is a welcoming destination where tourism drives economic prosperity, benefits the natural environment and celebrates rich, diverse cultures.
- Semi-independent state agency funded by state Transient Lodging Tax of 1.5%
- Efforts include marketing, sales, grantmaking, destination stewardship, research and more

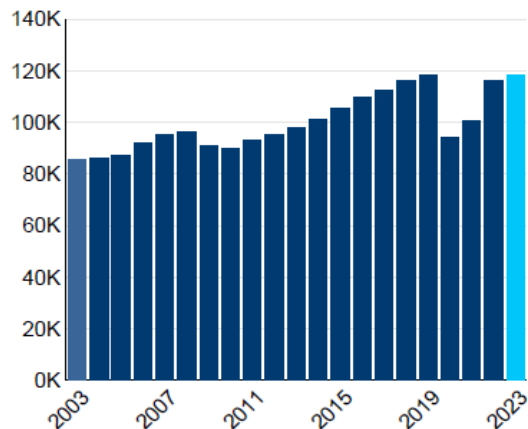


Economic Impact

- \$14 billion in direct travel spending in Oregon in 2023
- Travel generated 118,500 jobs across the state, returning to pre-pandemic numbers. Maintained role as largest traded sector employer in the state.
- Employees and proprietors earned \$4.5 billion in 2023
- \$651 million in local and state tax revenue from travel activity last year
- Oregonians accounted for 36% of visitor spending, other domestic visitors 59% and 4% came from international visitors



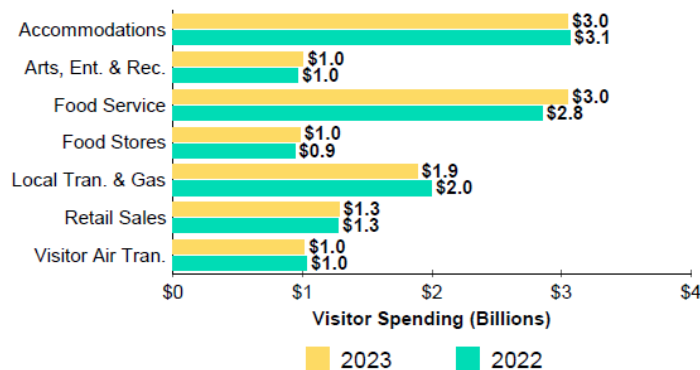
Oregon Travel Spending



Direct Travel Employment

Oregon / Spending

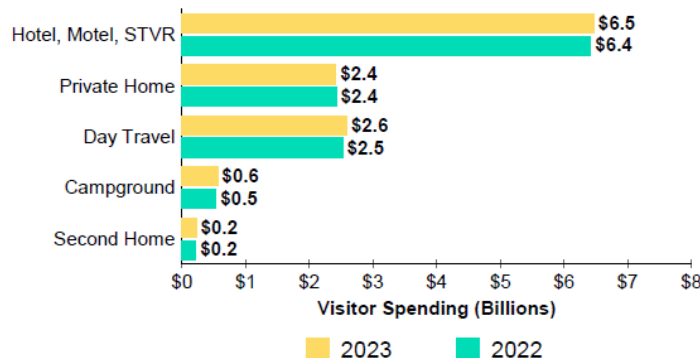
Visitor Spending by Commodity Purchased



The largest increase in spending came from Food Service (\$197 million), while the largest reduction in spending came from Local Tran. & Gas (-\$118 million).

Sources: Oregon Department of Revenue, Dean Runyan Associates, Omnitrak Group, KeyData Dashboard, STR LLC., AirDNA

Visitor Spending by Accommodation Type

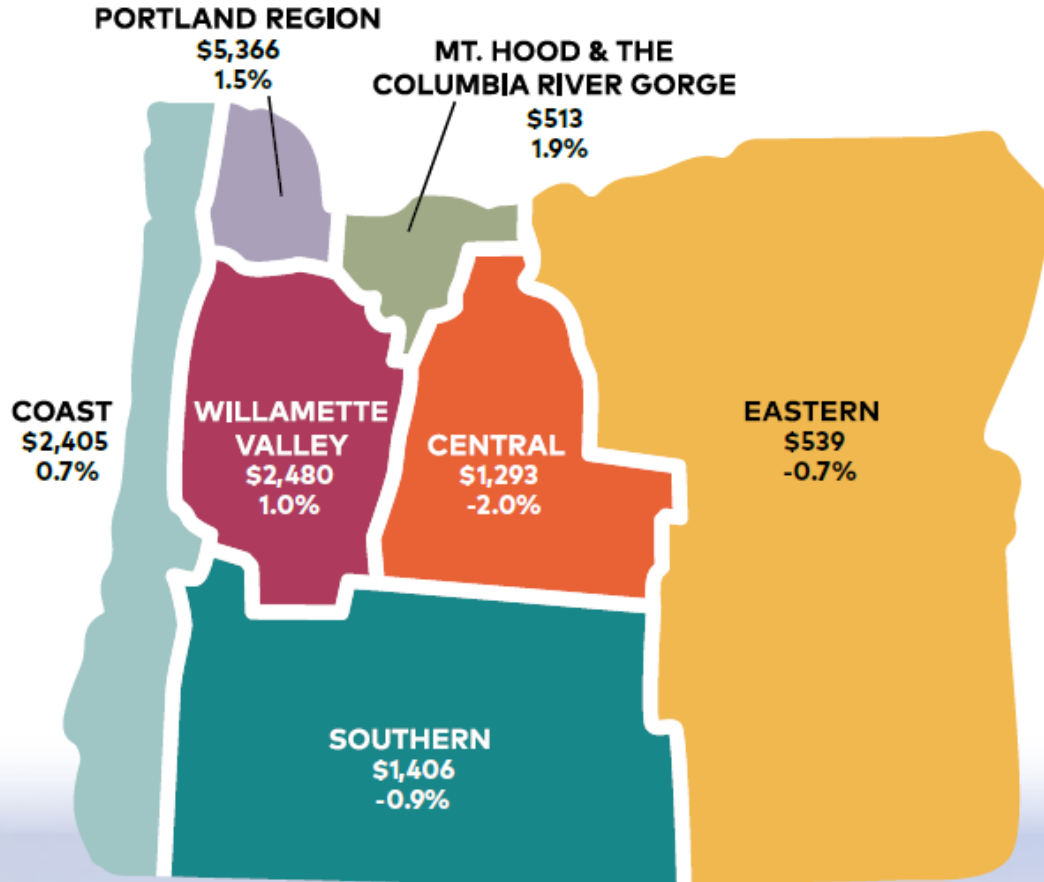


Visitors who stayed in a hotel, motel or short-term vacation rental (STVR) spent a combined \$6.5 billion in 2023, an **increase of 0.7%** compared to 2022.

Visitor Spending by Accommodation Type includes spending on all commodities by where the visitors spend the night or for day-trips.

Sources: Oregon Department of Revenue, Dean Runyan Associates, STR LLC., KeyData Dashboard, U.S. Census Bureau, Omnitrak Group

Regional spending in 2023 (in millions) and % change compared to 2022

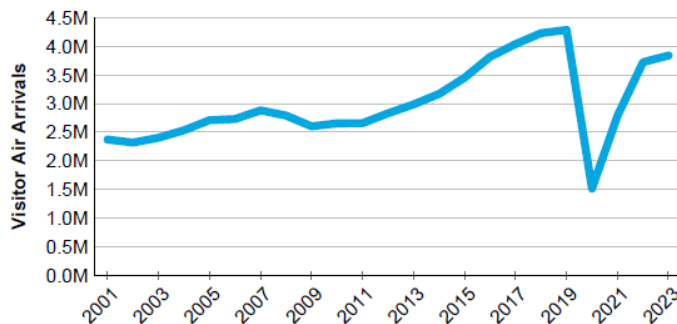


Regional Impacts

- We analyze based on our seven tourism region model
- Six regions have significantly surpassed their pre-pandemic spending figures
- While Portland Region is up YOY, the region is only 95% recovered to pre-pandemic spending
- Largest YOY growth in Mt. Hood Gorge region followed by Portland Region
- Central Oregon saw largest YOY reduction

Oregon / Visitor Volume

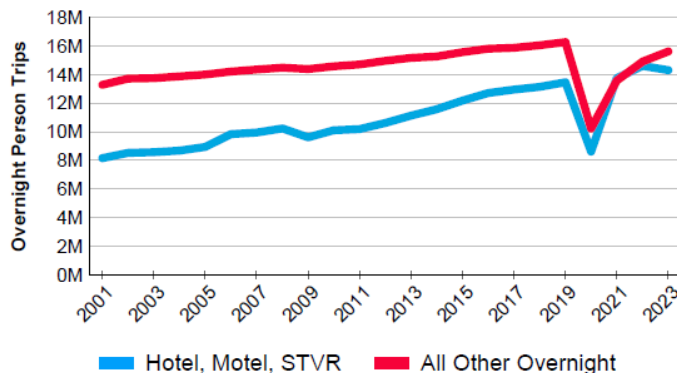
Air Passenger Visitor Arrivals / U.S. Air Carriers



In 2023, Oregon welcomed 3.8 million U.S. visitors who traveled to the state by plane, a 3% increase compared to the previous year. This is still 450,000 less than the visitors who traveled to Oregon by plane in 2019.

Sources: Bureau of Transportation Statistics, Dean Runyan Associates

Overnight Volume

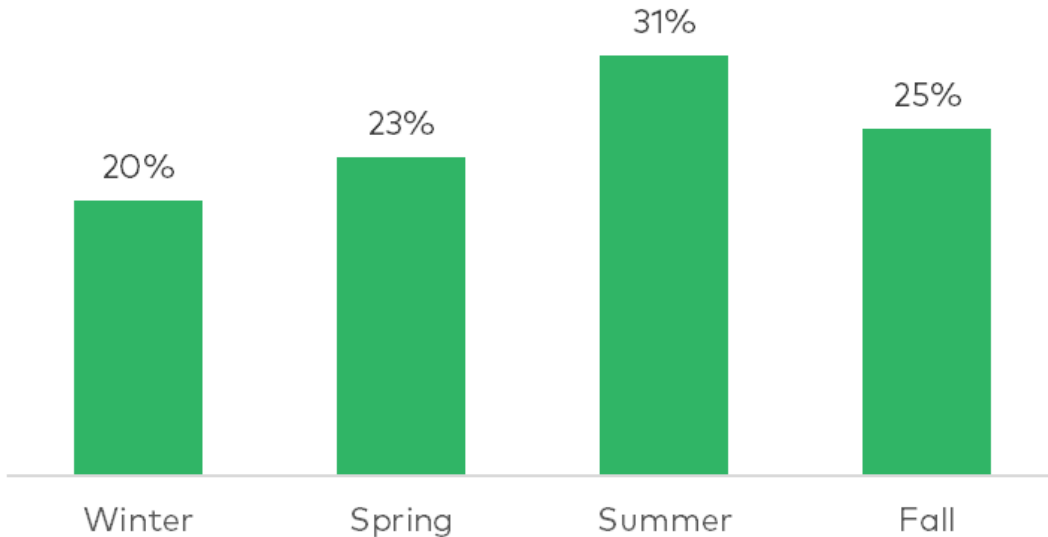


Overall, overnight-visitor volume grew by 1.4% in 2023 compared to the previous year. The number of visitors who stayed in a hotel, motel, or STVR decreased by 2% and the number of visitors who camped, stayed with friends and family, or stayed in a second home grew by 4.7%

Sources: Oregon Department of Revenue, Dean Runyan Associates, Omnitrak Group, Oregon State Parks, STR LLC., KeyData Dashboard, AirDNA, U.S. Census Bureau

Seasonality

Visits by Season 2023



- Travel Oregon works to spread the positive economic impact of tourism across seasons
- Unsurprisingly, visitation is highest in the summer and lowest in the winter
- In addition to a significant reduction in occupancy in the winter, room rates also decrease



Joshua Rainey

Visitor Sentiment

- 95% of visitors are satisfied or very satisfied with their trips to Oregon
- Scenic beauty and relaxation are the largest motivators for a trip to Oregon
- Enjoying local food and drink was most popular activity, followed by outdoor recreation
- 88% say they are likely to return to Oregon soon—repeat visitors stay longer and spend more

Travel Oregon with Travel Oregon



Meet Your Oregon Guides

Get to know Oregon from people who love Oregon. Find an expert guide to embark on epic adventures.

Filter by Activity



Wavecrest Discoveries

Based in Oregon Coast



Travel Oregon with James



Chockstone Climbing Guides

Based in Central Oregon



Guided Kayak Tours - Newport

Based in Oregon Coast



Portland Spirit Tours on The Explorer Jetboat

Based in Portland Region



Astoria Underground Tour

Based in Oregon Coast



Kayak Tillamook County

Based in Oregon Coast



Travel Oregon with Anika

- Year-round marketing campaign, active across 15 markets in traditional and social media platforms as well as owned content
- Focus on "Go with a Guide" message
- Objectives:
 - Welcome all
 - Reach new audiences
 - Stronger, more personal connections to Oregon
 - Disperse visitors
 - Address seasonality
 - Drive travel bookings

EXAMPLE CONTENT





Tourism Ecosystem

- Travel Oregon strives to drive visitation to and across the state, aligning with local Destination Management/Marketing Organizations (DMOs)
- Stable local funding allows DMOs to plan, leverage resources
- Travel Oregon can increase support for communities as they face challenges (e.g. post-wildfire, Portland's recovery)

Questions?



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Todd Davidson, Chief Executive Officer