



**OREGON TOURISM
COMMISSION
FEBRUARY 2021**

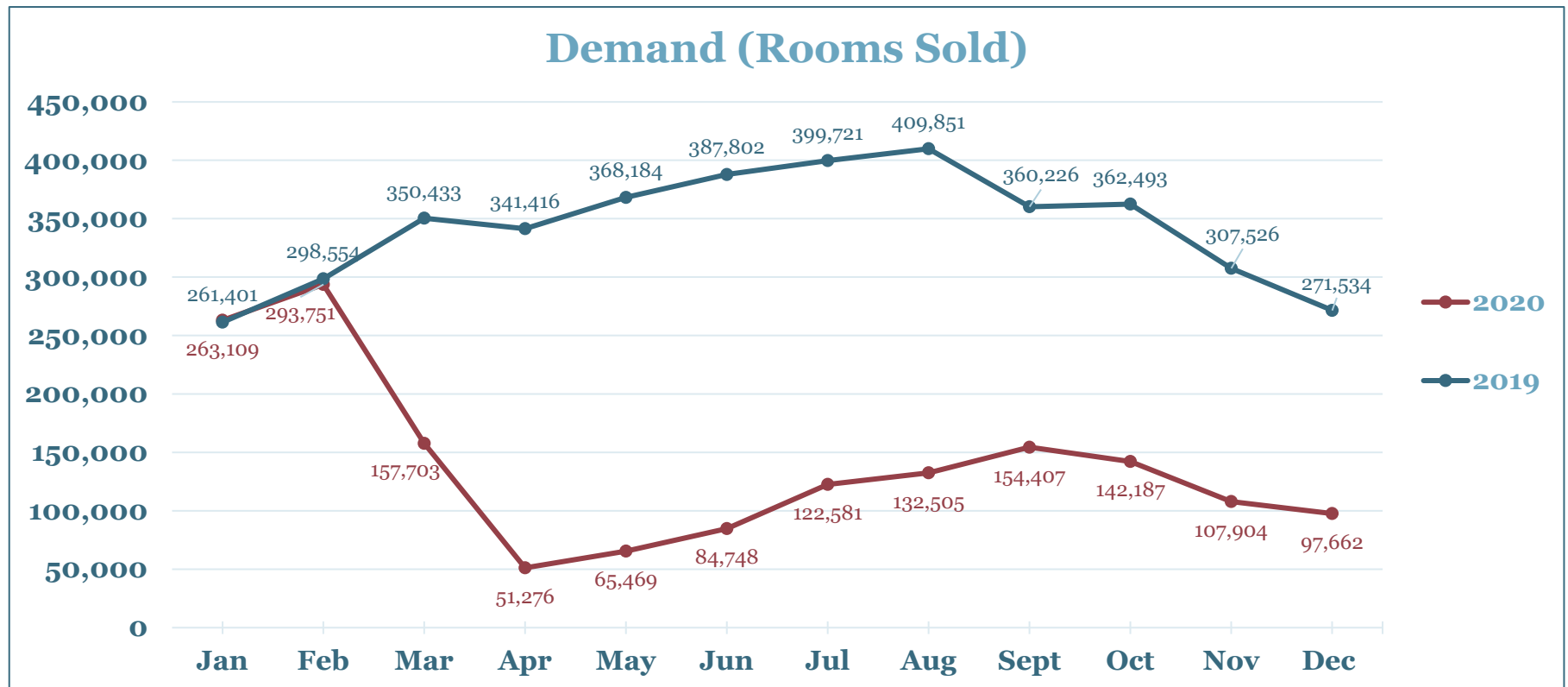
**TRAVEL
PORTLAND**

DEAN RUNYAN

| | 2011 | 2019 | PERCENT CHANGE |
|---------------------------|------------|------------|----------------|
| SPEND | \$3,899 Bn | \$5,633 Bn | +44% |
| EARNINGS | \$882 MM | \$1,570 Bn | +78% |
| JOBS (Incremental) | 28,560 | 36,930 | +29% |
| LOCAL TAXES | \$76,214 | \$138,905 | +82% |
| STATE TAXES | \$83,523 | \$138,863 | +66% |
| TOTAL TAXES | \$159,737 | \$277,768 | +74% |

PORTLAND HOTEL PERFORMANCE: CITY OF PORTLAND+

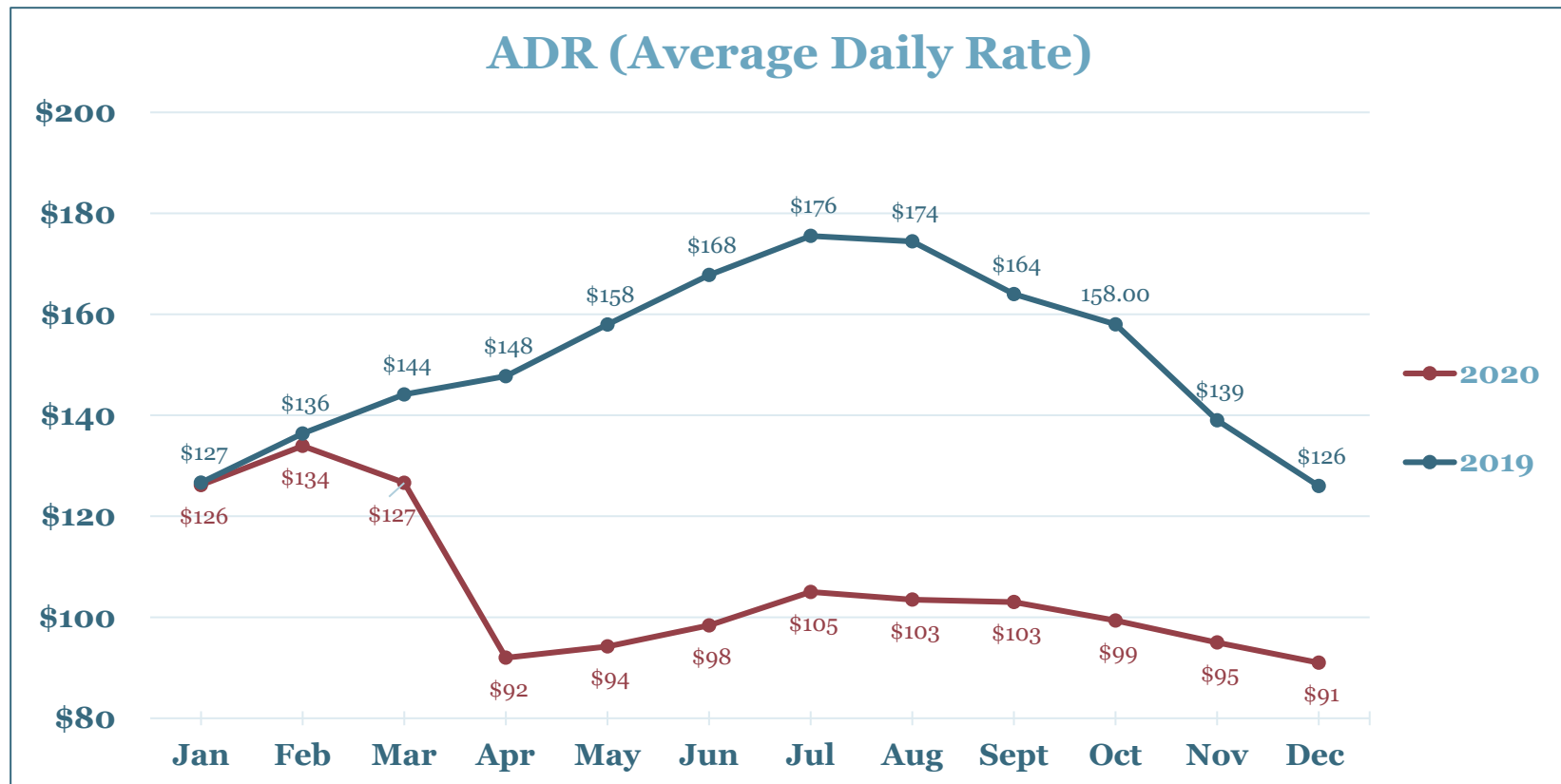
(CITY OF PORTLAND+ INCLUDES CENTRAL CITY, AIRPORT, JANTZEN BEACH, AND EASTSIDE)



Source: STR

PORTLAND HOTEL PERFORMANCE: CITY OF PORTLAND+

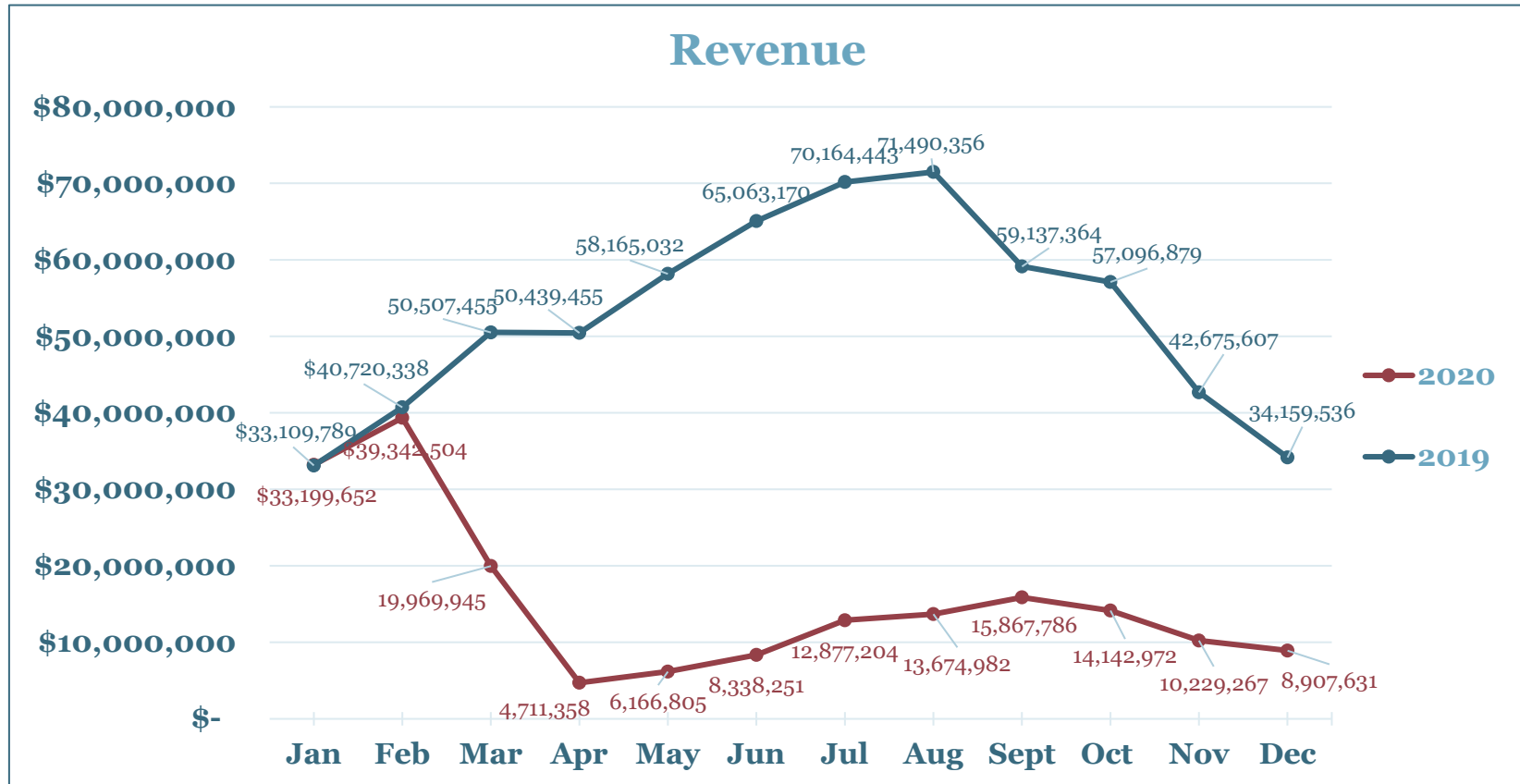
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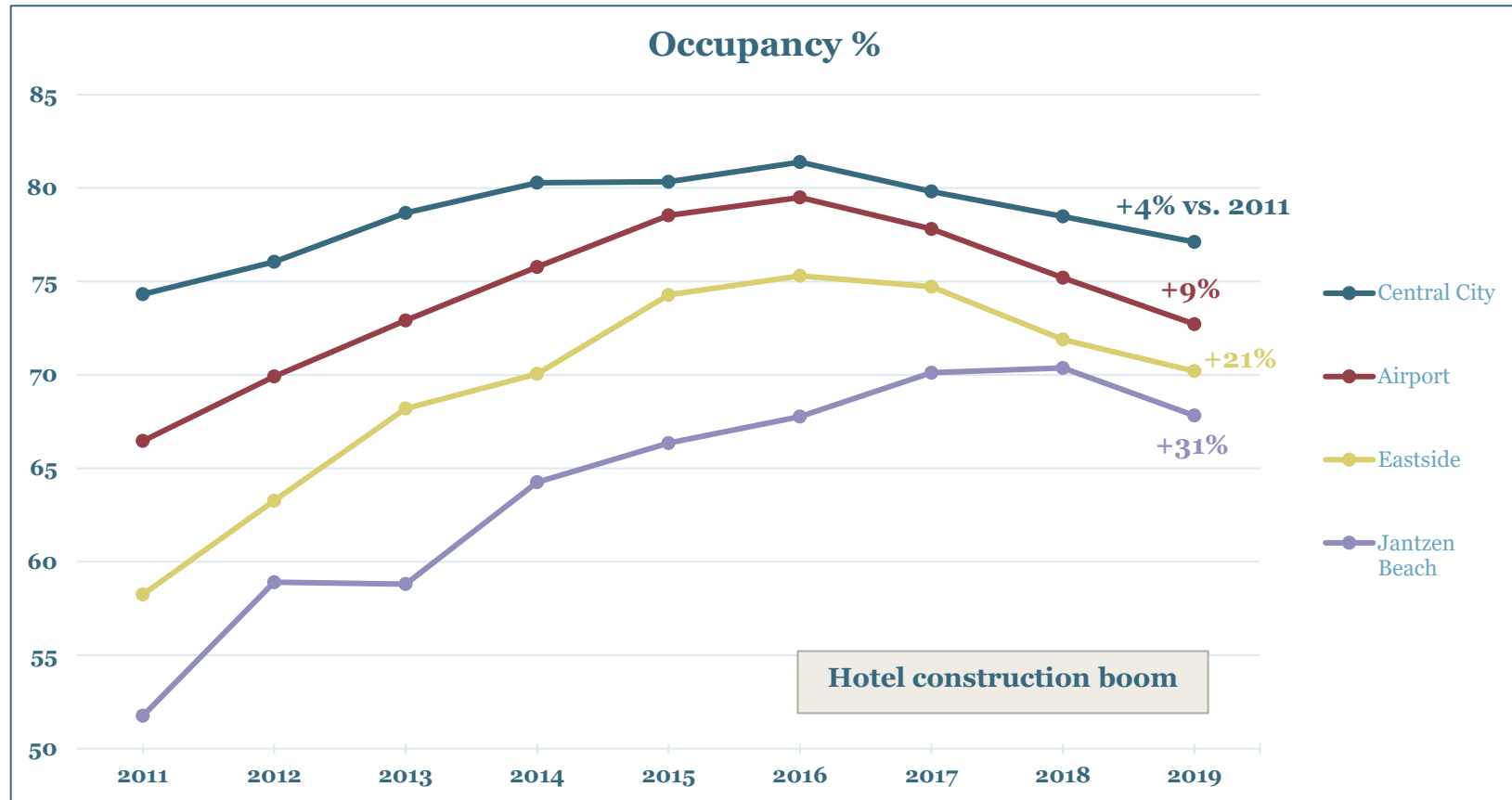
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(CITY OF PORTLAND+ INCLUDES CENTRAL CITY, AIRPORT, JANTZEN BEACH, AND EASTSIDE)



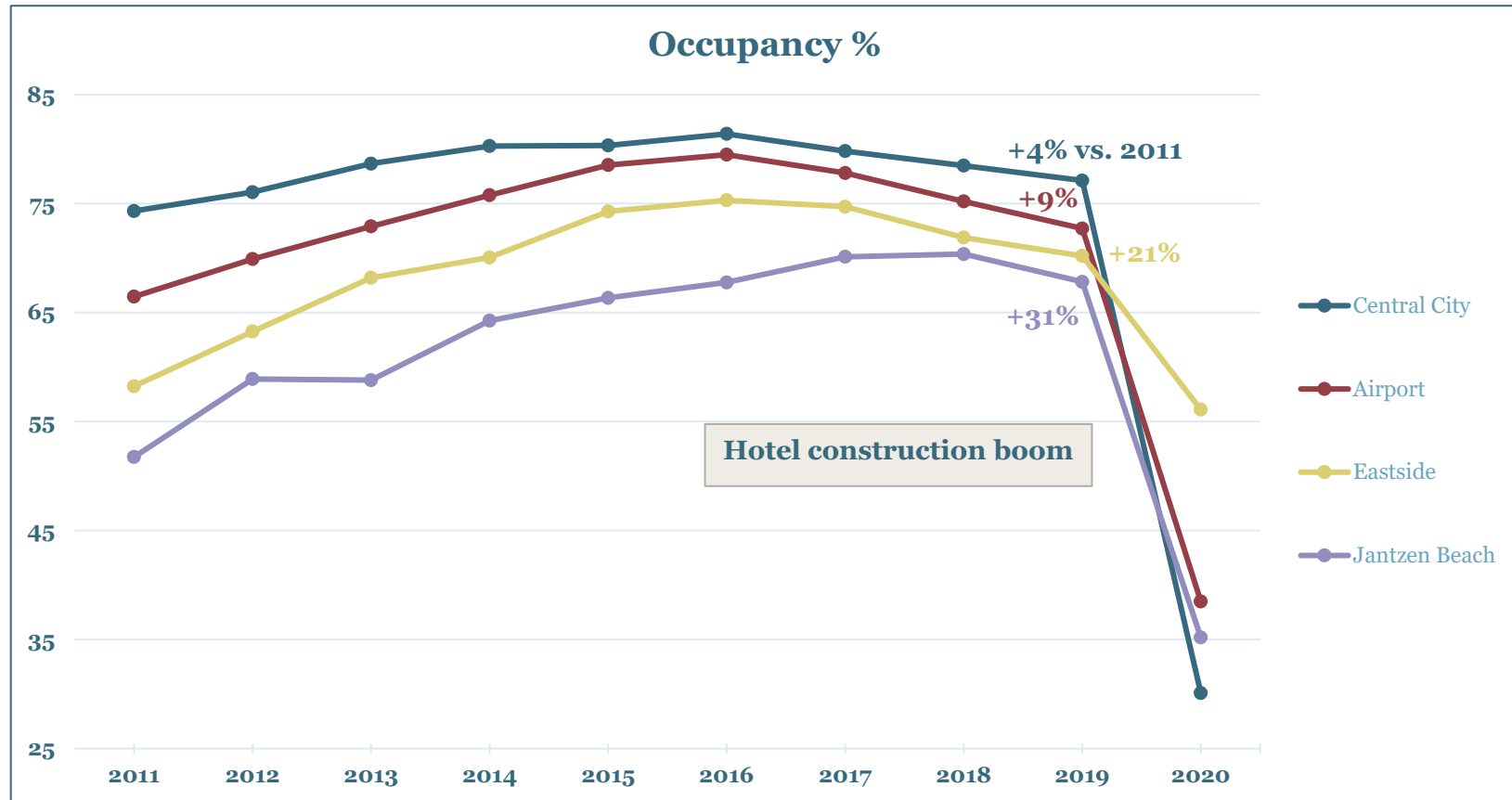
Source: STR

PORTLAND HOTEL OCCUPANCY CHANGES (2011-2019)



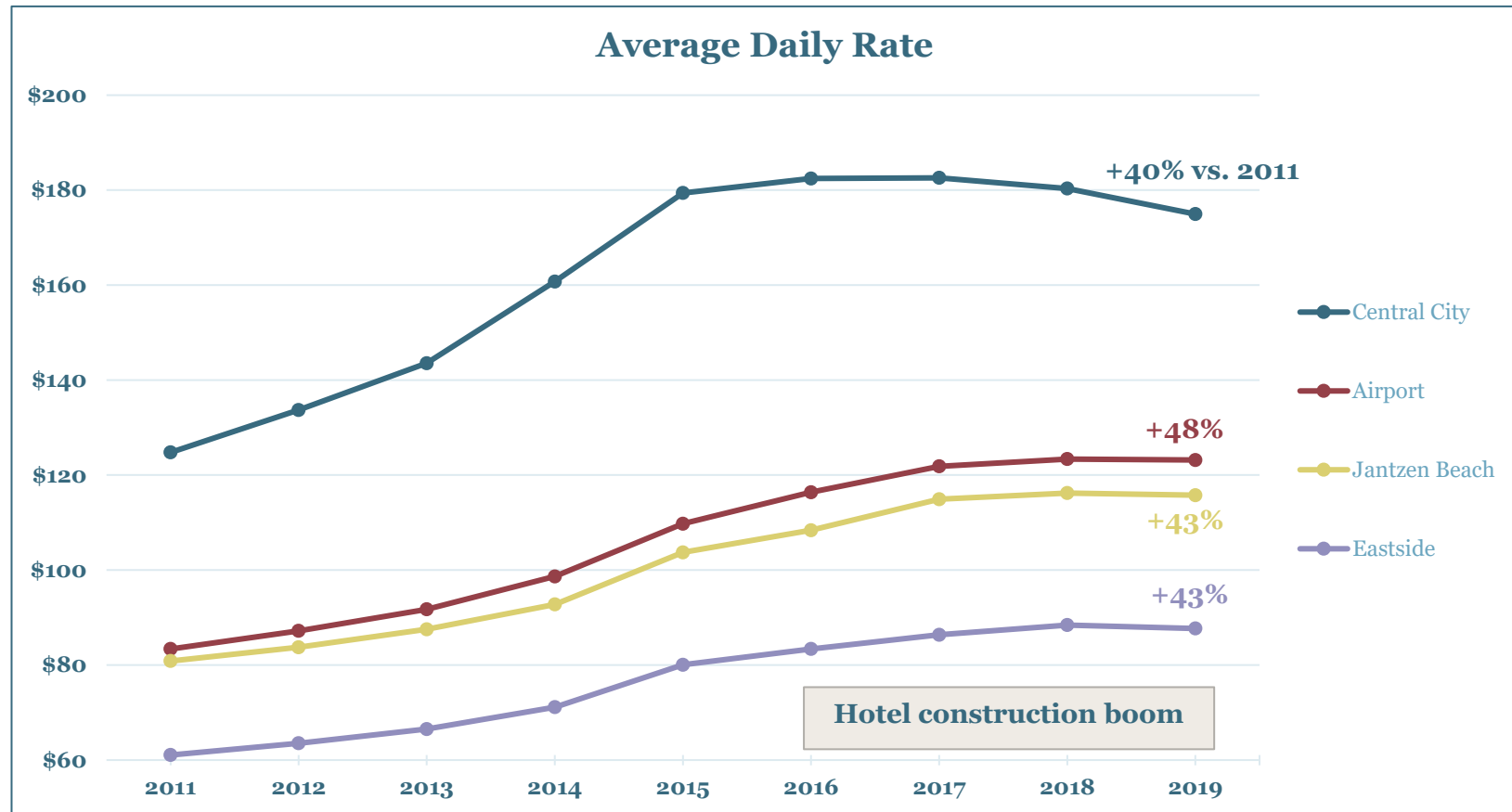
Source: STR

PORTLAND HOTEL OCCUPANCY CHANGES (2011-2020)



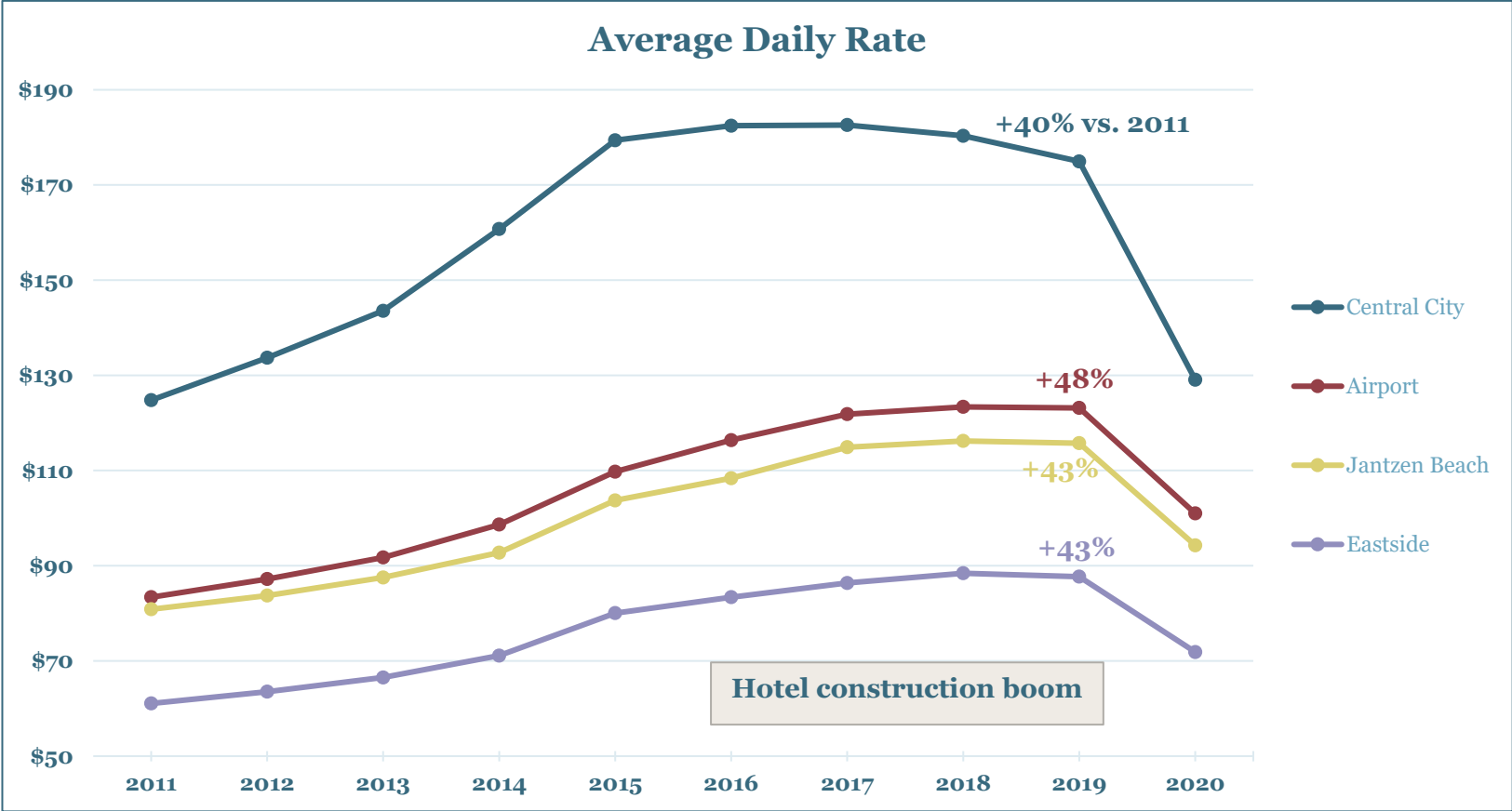
Source: STR

PORTLAND HOTEL AVERAGE DAILY RATE CHANGES (2011-2019)



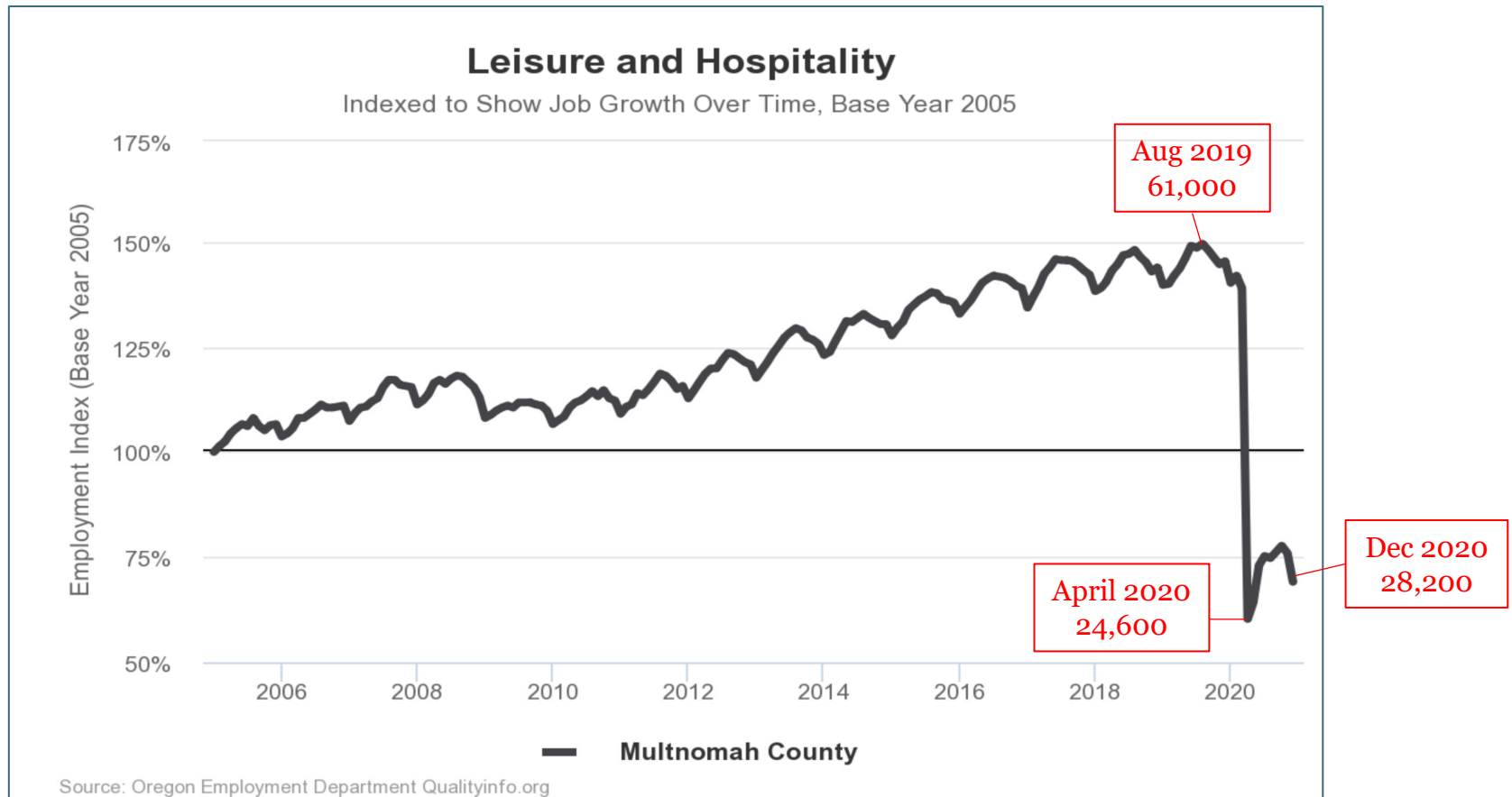
Source: STR

PORTLAND HOTEL AVERAGE DAILY RATE CHANGES (2011-2020)



Source: STR

MULTNOMAH COUNTY EMPLOYMENT DATA – LEISURE AND HOSPITALITY SECTOR



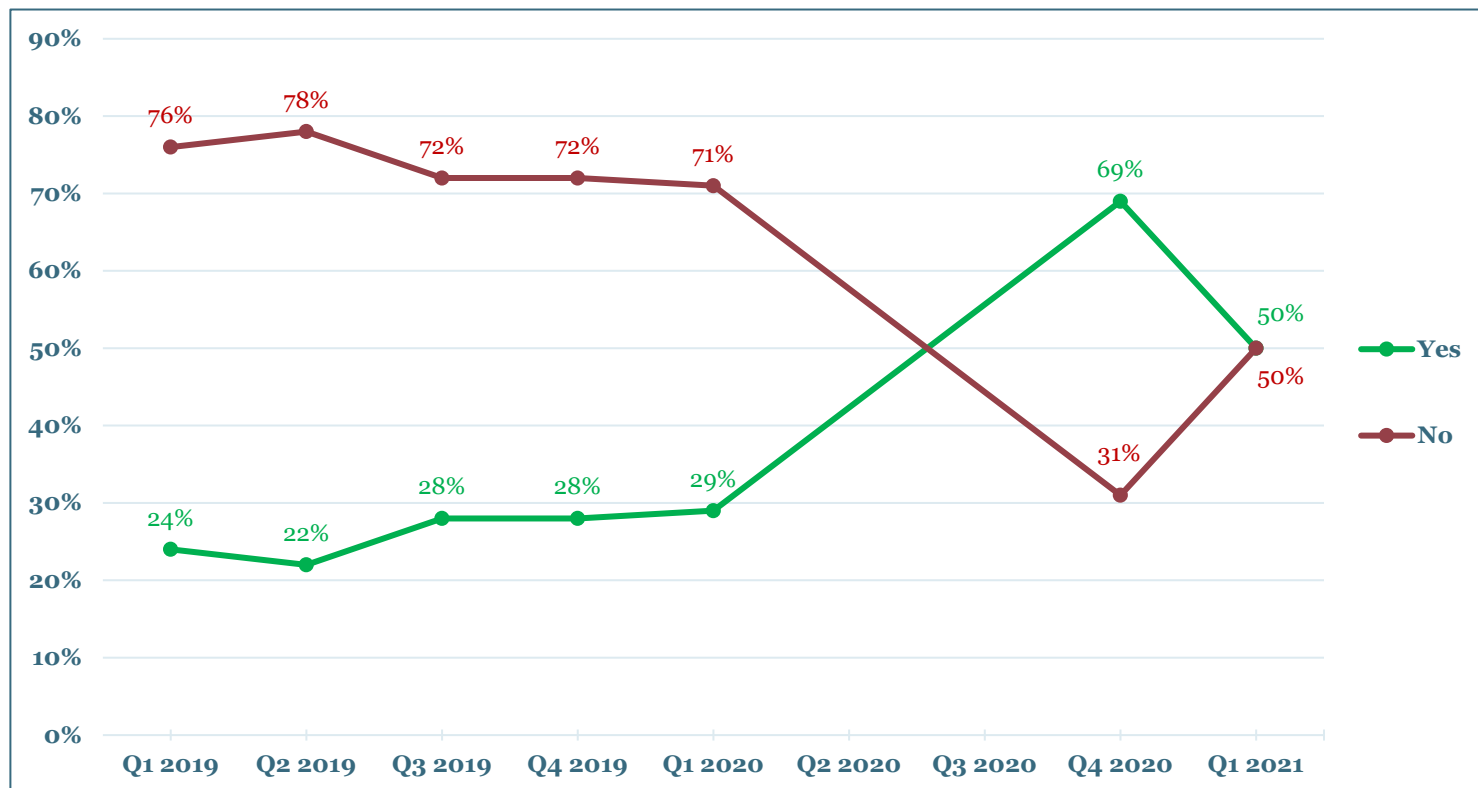
FORECAST UPDATE

| | FY19 ACT | FY20 ACT | FY21 BUD (MAY 20) BOARD APPROVED | FY21 BUD (NOV 20) WORKING BUDGET | FY21 BUD (FEB 21) SCENARIO 1 |
|---|---------------------|---------------------|-------------------------------------|-------------------------------------|---------------------------------|
| REVENUES | | | | | |
| City/County Transient Lodging Tax (1%) | \$6,935,320 | \$6,174,375 | \$3,772,778 | \$1,821,888 | \$1,276,831 |
| Tourism Improvement District (TID - 2%) | \$13,786,128 | \$12,697,600 | \$7,507,828 | \$3,802,082 | \$2,776,590 |
| TLT/TID Combined | \$20,721,448 | \$18,871,975 | \$11,280,606 | \$5,623,970 | \$4,053,421 |
| MERC (OCC Contract) | \$4,391,069 | \$4,124,500 | \$2,315,927 | \$1,461,783 | \$1,461,783 |
| Cooperative Programs | \$124,835 | \$134,769 | \$0 | \$0 | \$0 |
| Partnership Dues | \$453,592 | \$421,798 | \$0 | \$0 | \$0 |
| Fees (i.e., Housing) | \$447,175 | \$325,340 | \$0 | \$0 | \$0 |
| Cultural Tourism | \$332,777 | \$342,441 | \$187,000 | \$187,000 | \$187,000 |
| Visitor Development Fund (VDF) | \$0 | \$60,000 | \$840,000 | \$0 | \$0 |
| Regional Coop Tourism Program (RCTP) | \$2,916,006 | \$1,267,443 | \$3,143,500 | \$3,143,500 | \$3,143,500 |
| Total Revenues | \$29,386,902 | \$25,548,266 | \$17,767,033 | \$10,416,253 | \$8,845,704 |
| EXPENSES | | | | | |
| Convention Sales | \$5,440,350 | \$4,435,807 | \$2,366,623 | \$2,361,133 | \$2,361,133 |
| International Affairs | \$2,518,685 | \$1,856,643 | \$878,025 | \$671,468 | \$671,468 |
| Marketing & Research | \$9,041,670 | \$8,011,897 | \$3,557,537 | \$3,204,085 | \$3,204,085 |
| Communications & PR | \$0 | \$0 | \$940,676 | \$692,573 | \$692,573 |
| Regional Coop Tourism Program (RCTP) | \$2,919,387 | \$1,267,443 | \$3,143,500 | \$3,143,500 | \$3,143,500 |
| Convention Services & Events | \$1,263,808 | \$1,054,431 | \$610,874 | \$578,426 | \$578,426 |
| Community Engagement | \$1,248,361 | \$938,852 | \$436,822 | \$460,963 | \$460,963 |
| Visitor Services | \$369,022 | \$472,123 | \$40,555 | \$37,646 | \$37,646 |
| Events | \$416,718 | \$245,250 | \$0 | \$0 | \$0 |
| Program Support | \$3,263,852 | \$3,190,671 | \$3,154,882 | \$3,773,719 | \$3,773,719 |
| One-time VDF offset for Conv Sales | \$0 | \$0 | \$440,000 | \$0 | \$0 |
| Deferred Rent (overstatement of rent) | \$0 | \$0 | \$0 | (\$637,645) | (\$637,645) |
| One-time TBD | \$0 | \$0 | \$150,000 | \$0 | \$0 |
| One-time TBD | \$0 | \$0 | \$400,000 | \$0 | \$0 |
| PPP Loan (Forgivable) | \$0 | \$0 | \$0 | \$0 | (\$1,395,000) |
| Non-Personnel Hold-backs | \$0 | \$0 | \$0 | \$0 | (\$2,400,000) |
| Grand Total Expenses | \$26,481,853 | \$21,473,117 | \$16,119,494 | \$14,285,868 | \$10,490,868 |
| Net Increase or Decrease (Profit/Loss) | \$2,905,049 | \$4,075,149 | \$1,647,538 | (\$3,869,615) | (\$1,645,164) |

- The latest budget forecast shows further erosion of TID/TLT revenue
- Updates include PPP forgivable loan, \$1.395M for relief of FY21 expenses
- Scenario planning for program spending is in process
- Determining the TID/TLT growth curve is critical
- Careful planning on reserve spending
 - Targeted reserves
 - Upcoming increase in rent >\$1M annually FY23
- Scenario planning for staff in process

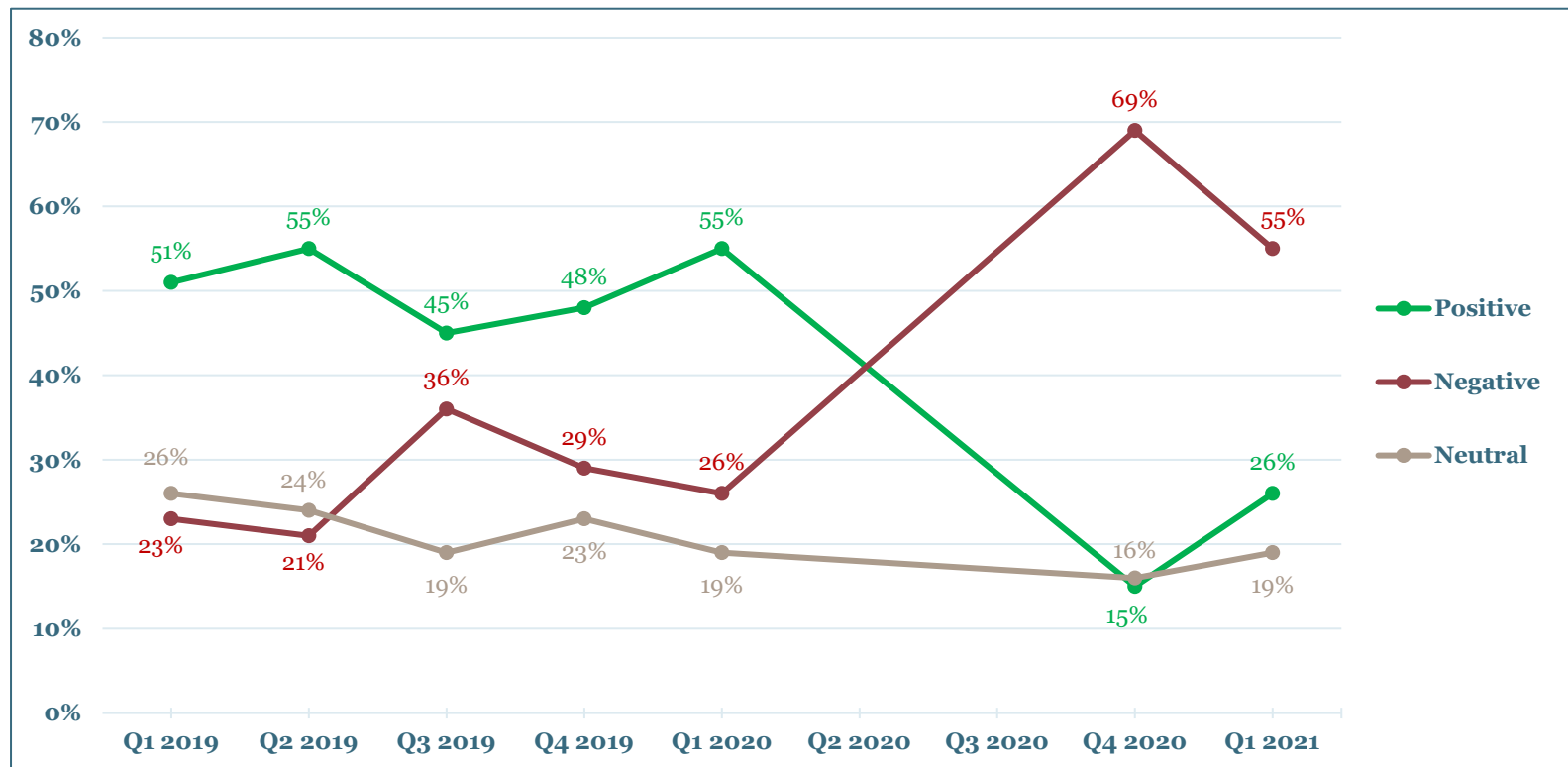
PORTLAND CONSUMER RESEARCH

Q: Have you heard of Portland being mentioned in the news/media in the past 2 months?



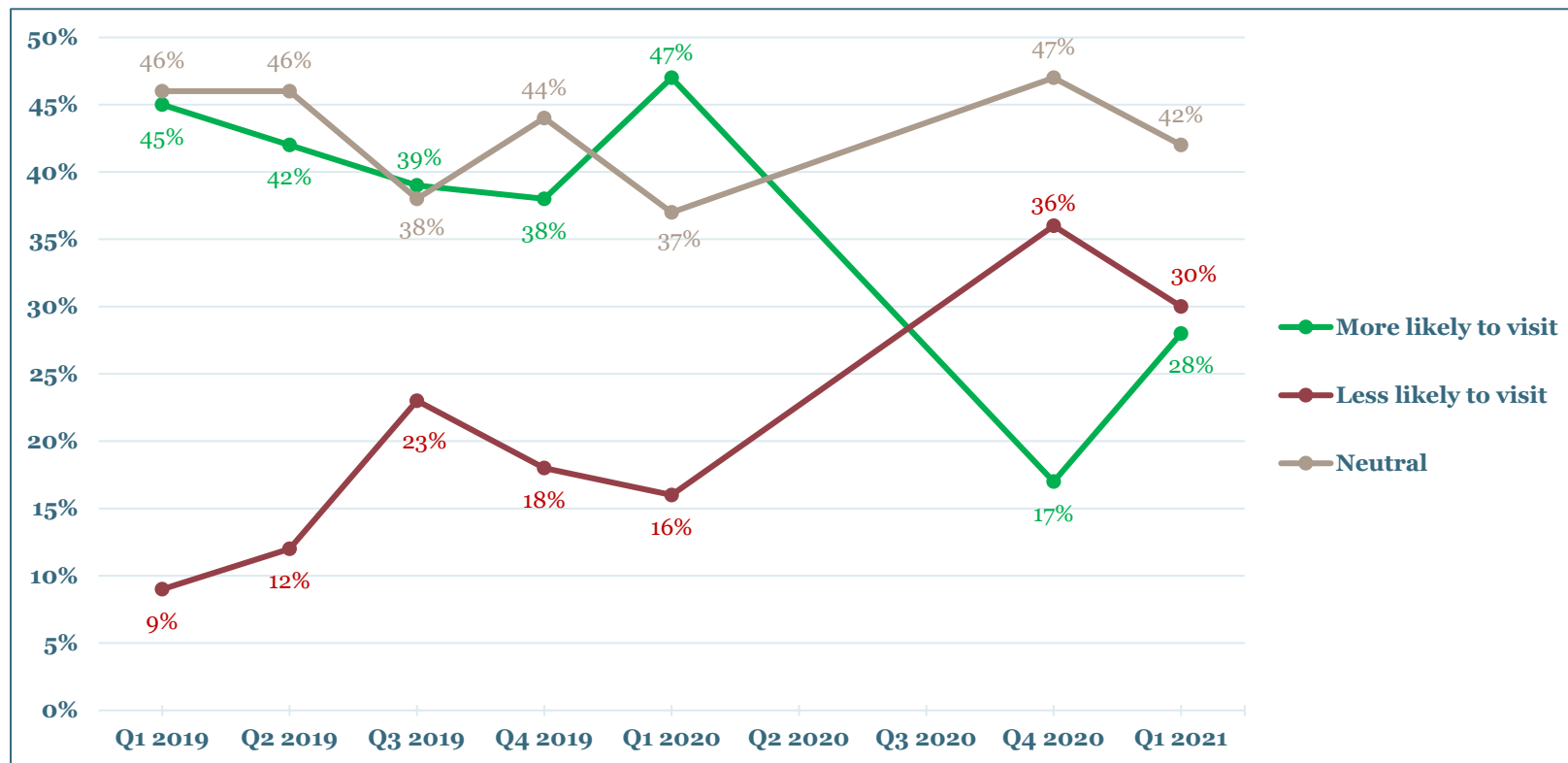
PORTLAND CONSUMER RESEARCH

Q: Would you consider the general tone of media coverage you saw or heard about Portland to be:



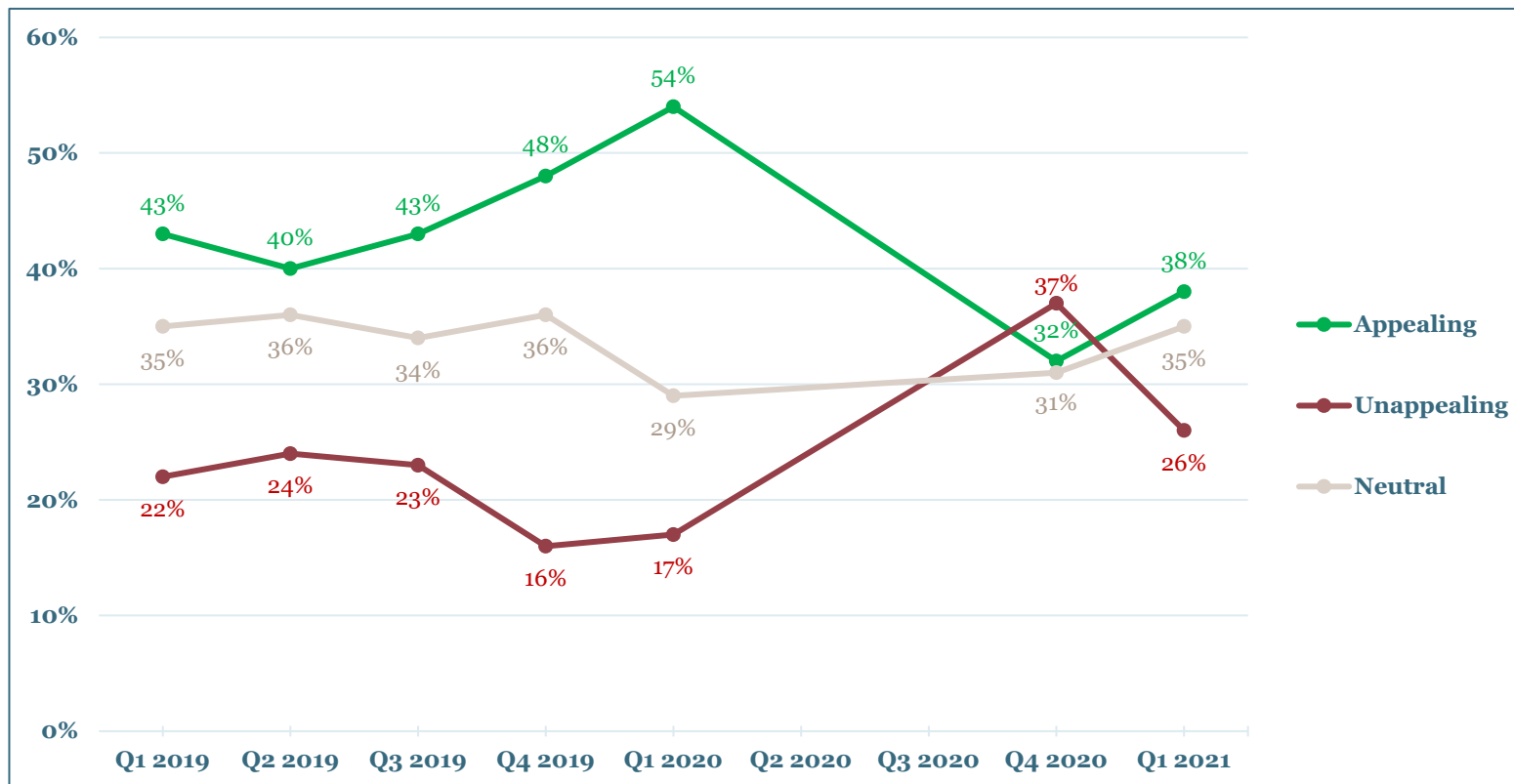
PORTLAND CONSUMER RESEARCH

Q: Would media coverage you have seen/heard about Portland make it more or less likely you would visit?



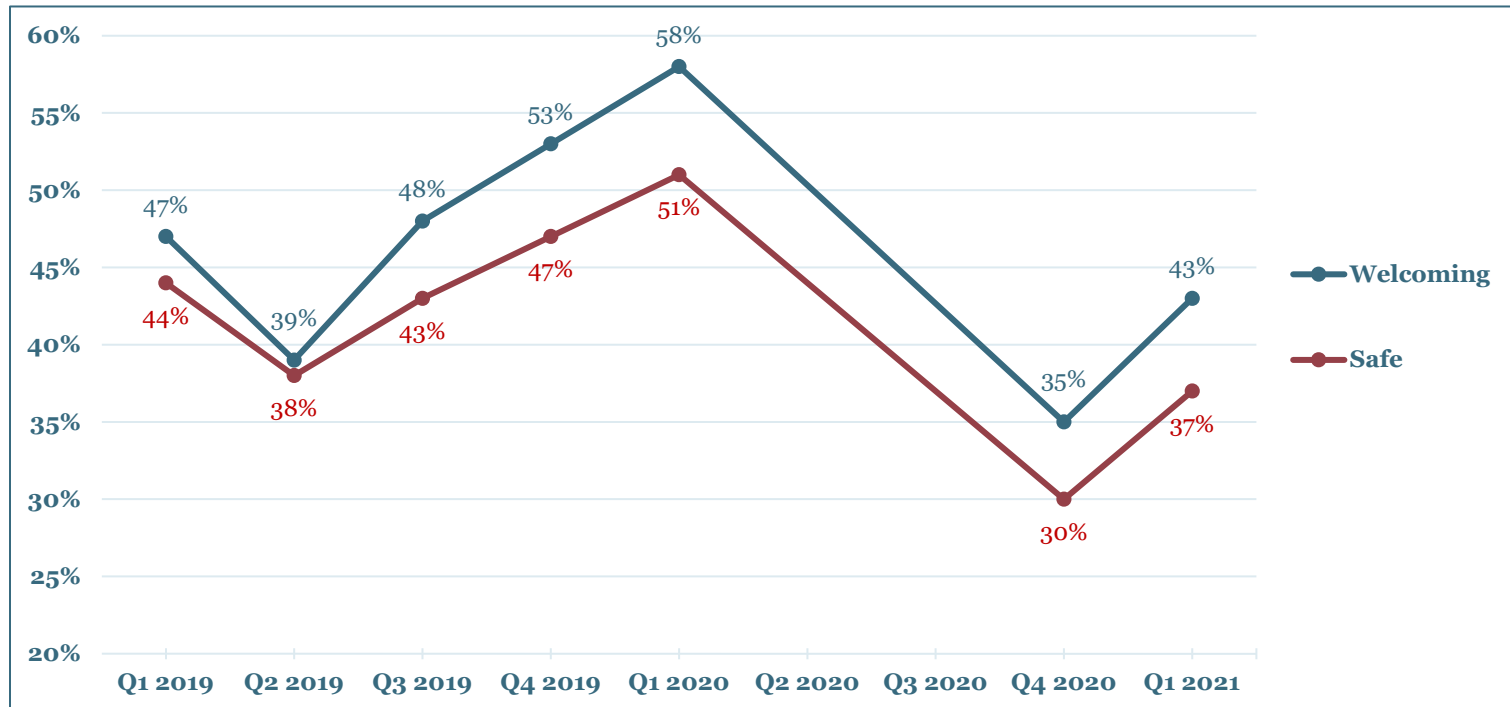
PORTLAND CONSUMER RESEARCH

Q: How appealing is Portland as a potential vacation destination to you?



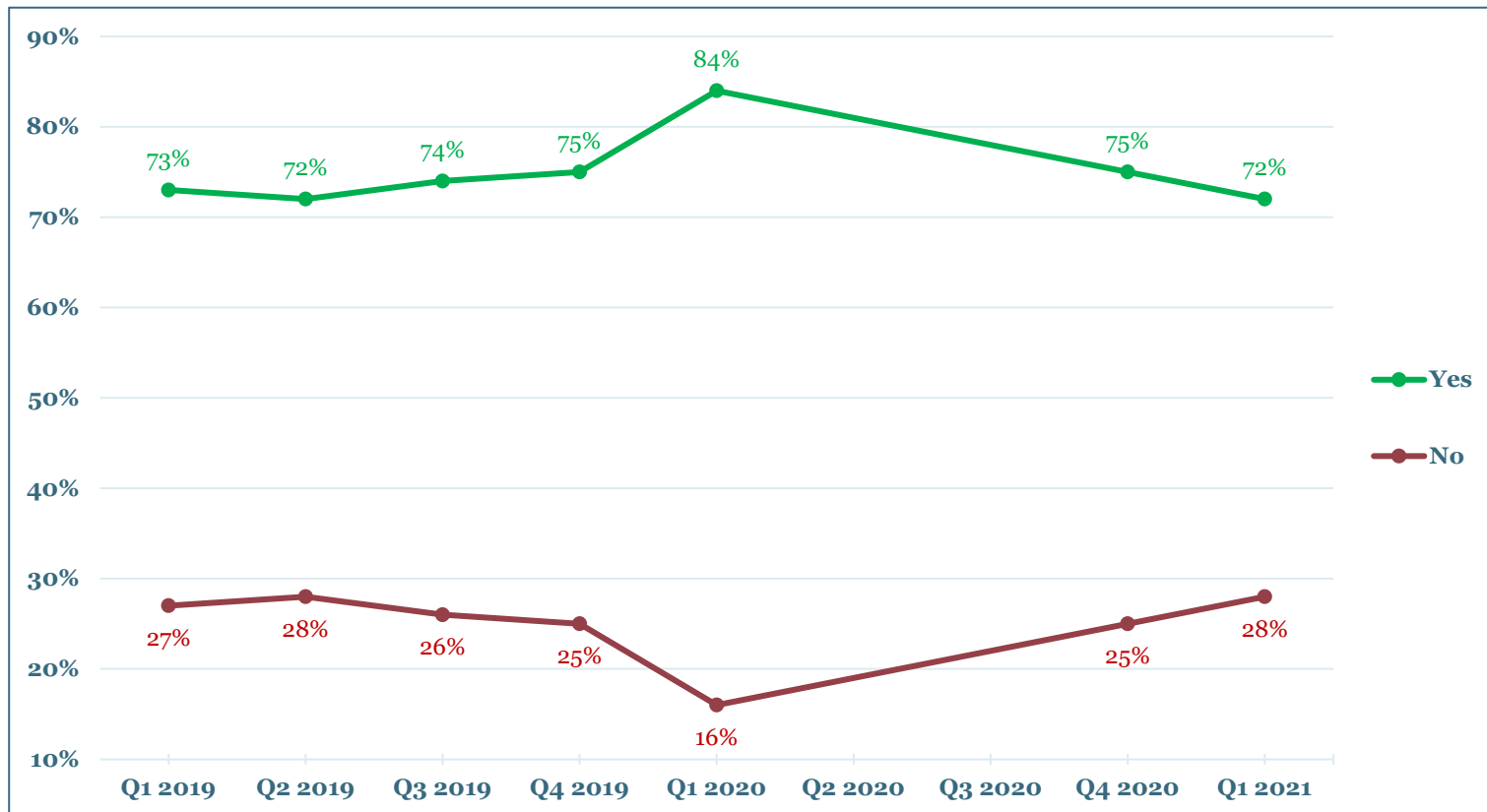
PORTLAND CONSUMER RESEARCH

Q: Portland is a welcoming destination. (AGREE - Top 2 Box)
VS.
Q: Portland is a safe destination. (AGREE - Top 2 Box)



PORTLAND CONSUMER RESEARCH

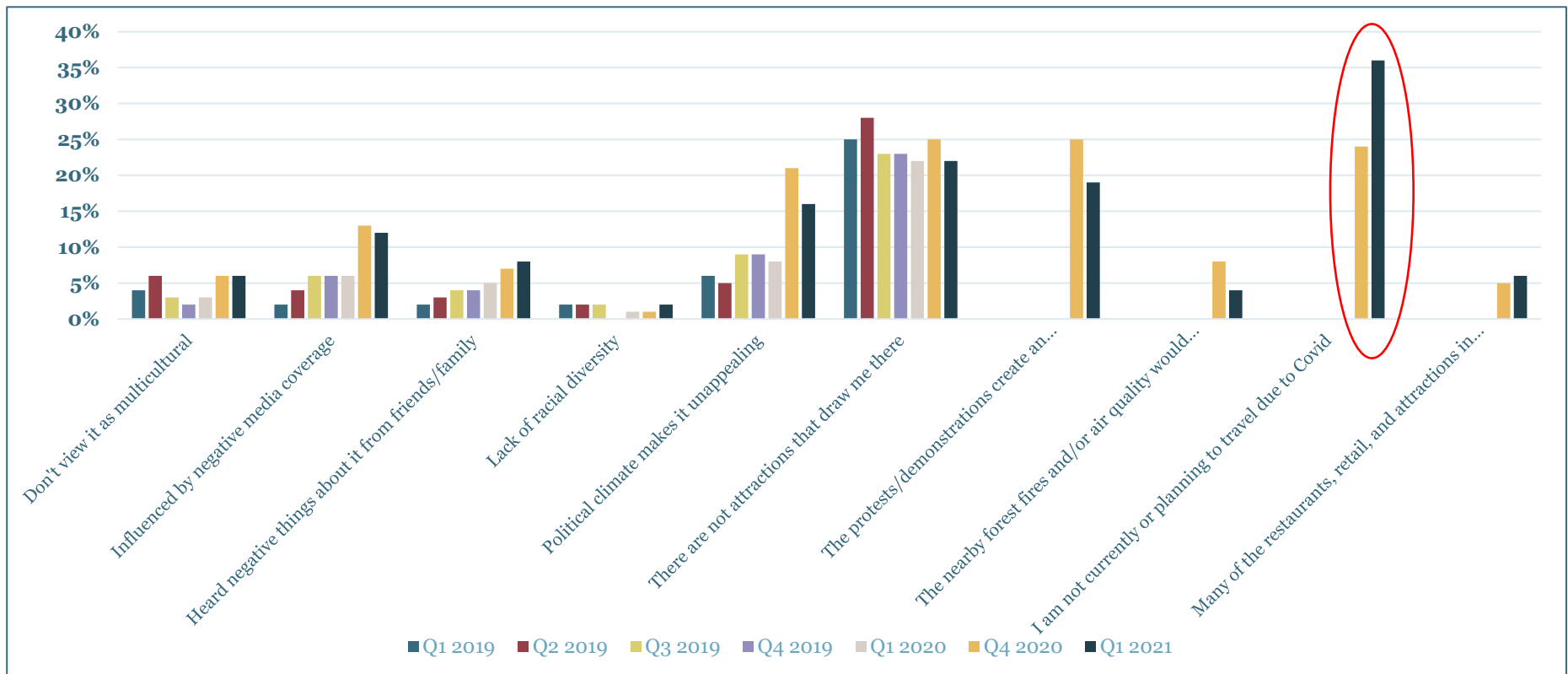
Q: If you have visited Portland, are you likely to visit again?



PORTLAND CONSUMER RESEARCH

Q: Why is Portland not a likely destination for you to visit?

(Among those who have visited Portland and are not likely to visit again OR have not visited and are not likely to ever visit)



Q7. Are there any need areas that your hotel has that could be assisted with additional TID-funded support?

- **Reputation management** (6 responses)
 - “Overall support on why travelers should come to Portland. We have seen too much National and Regional media regarding how bad our downtown area is with protests, riots and closed business. We need to rewrite the story being told on Portland.”
- **Cleanup/homelessness/safety** (4 responses)
 - “Too many homeless issues and safety concerns with ongoing rioting. Travelers need to feel safe to choose Portland again in the future.”
- **Taxes and incentives** (3 responses)
 - “On the ground rebates and incentives to reimburse private marketing initiatives and incentives (tax deductions?) to target group business.”
- **Promoting all of Portland** (4 responses)
 - “I have always stressed that Travel Portland needs to Embrace and help hotels outside of the downtown core. Conventions needs to be placed on back burner for right now and concentrate on transient tourism.”

AIRBNB MARKETING PARTNERSHIP

Landing page

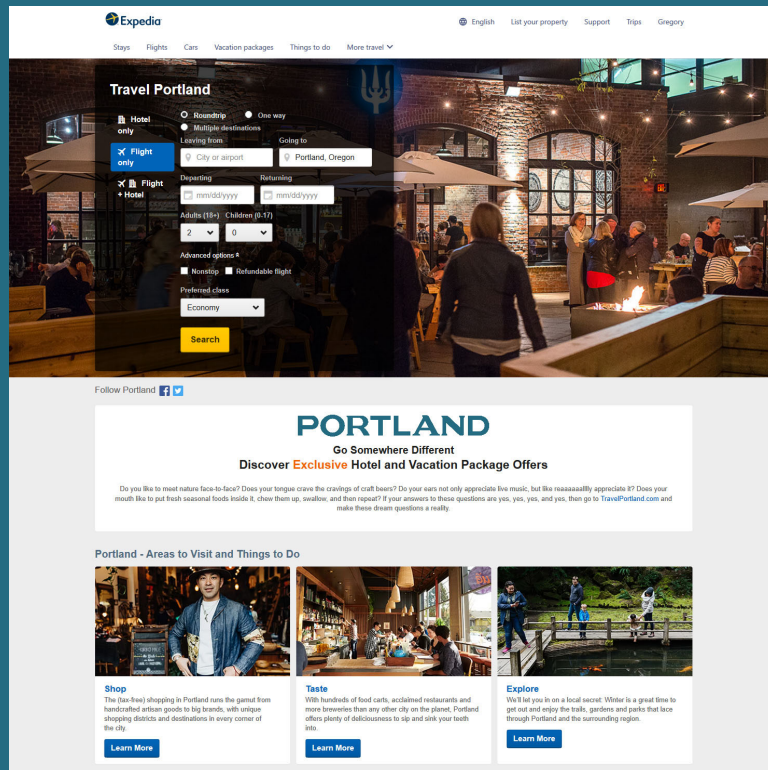
- Alberta
- Boise
- Cully
- Downtown
- Foster-Powell
- Food Cart Finder

Airbnb to promote via

- E-newsletter
- Social media



WHERE THE BANNERS DRIVE



Booking widget: all hotels in Portland



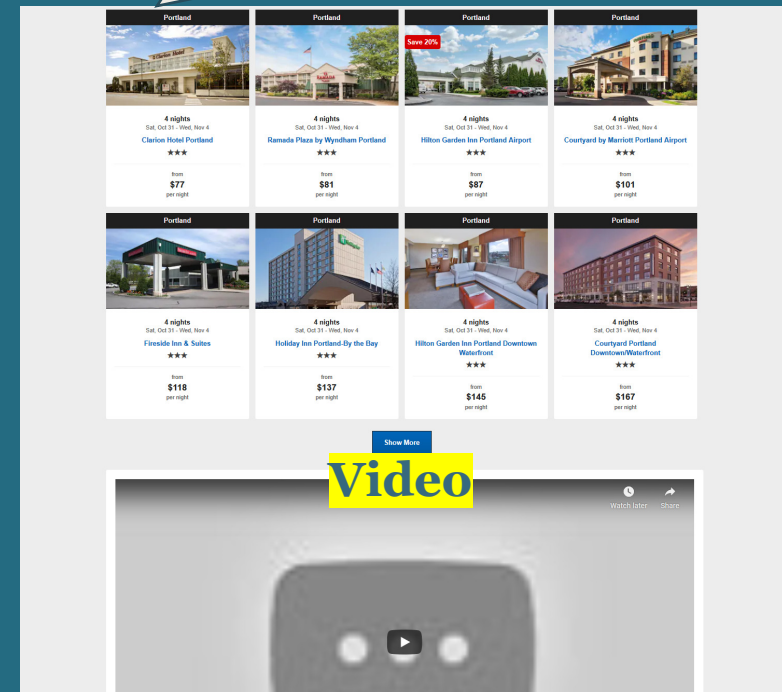
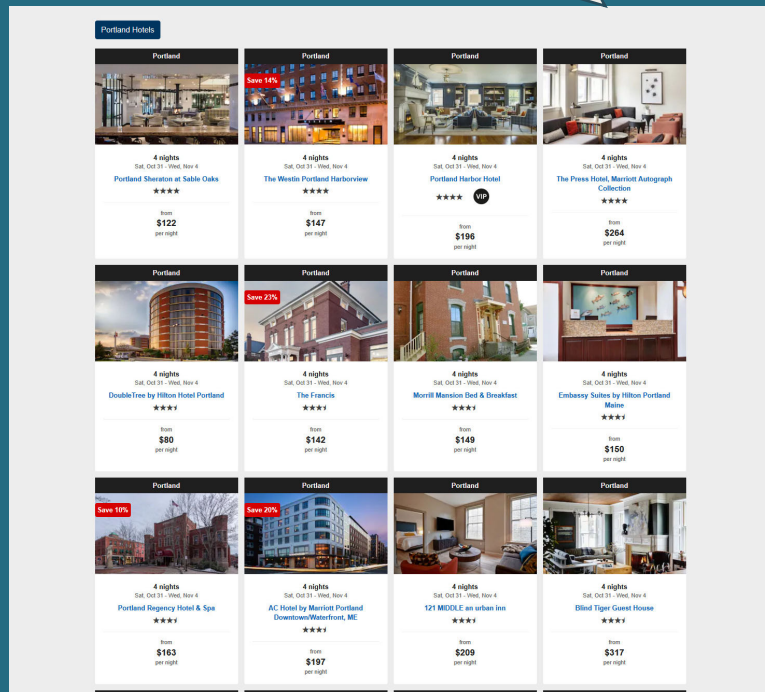
Inspirational prose: ~70 words



Destination content/storytelling

Messages also shared via social & content strategy

Hotel listings. (Properties can work with OTA reps to leverage the promotion, create packages/deals, carve out additional share of voice, etc.)



FOOD CART FINDER

Find the Perfect Cart

Start typing e.g. 'Senegalese', 'breakf.

Popular Filters

Japanese, Thai, Tacos, Curry, Falafel,
Noodles, Bahn Mi, Latin American,
Mediterranean, Sandwiches, Rice Bowls,
Gyros, Dumplings

Dietary Filters

- ☐ Vegetarian options
- ☐ Strictly Vegetarian
- ☐ Vegan options
- ☐ Strictly Vegan
- ☐ Gluten-free options
- ☐ Strictly Gluten-free
- ☐ Halal
- ☐ Kosher

203 carts found



Burgers x

Popular Filters

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Dietary Filters

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- ☐ Strictly Gluten-free
- ☐ Halal
- ☐ Kosher

11 carts found



Union Burger



Credit: Jacqueline Gormley

American

Known for: Burgers
Vegetarian Options

GOOGLE REVIEWS:

4.7 ★★★★★

 Northeast
Portland

FULL DETAILS 



THANK YOU

TRAVEL
PORTLAND