

TRAVEL



OREGON

MARKET SNAPSHOT

September 2023

Clayton Cotterell

FOCUS MARKETS

- Canada
- Germany including Austria & Switzerland
- Japan
- United Kingdom

MARKET SNAPSHOTS

- Brief economic look
- Who travels to Oregon?
- What inspires these travelers?
- How do they book their trips?
- Air service/how do these visitors travel here?
- New Products & key accounts
- Spending
- Trends for the future

WHO TRAVELS TO OREGON? AND HOW?

- Repeat US visitors
- Age 30+ couples & families
- Age 55+ couples & some multi generational groups
- Spring holidays
- Use lower prices during the off-season April-Jun and Sep/Oct
- Travel Preference:
 - Individual – FIT travel: Fly Drive or Motorhome tours (road trips)
 - Visit a region rather than a particular place
 - Often combine several states (e.g. Washington State, Oregon, and California)

CANADA



CANADA MARKET SNAPSHOT

- Travel from Canada to US is forecasted to reach 97% of 2019 levels in 2023
- Will surpass pre-pandemic levels in 2024
- Largest inbound travel market for the US
- Forecasted to make up 29% of all international inbound
- Spending by travelers from Canada expected to exceed levels from 2019 in 2024
- Canadians' likelihood to travel to the US has increased from 41% in March 2021 to 48% in March 2023



CANADA MARKET AIR SERVICE

- Air capacity from Canada to the US in 2023 is expected to reach 90% of 2019 levels.
- Canada to Portland (PDX) direct services include:
 - From Vancouver: Air Canada: YVR-PDX, 3 x daily, PDX-YVR, 4 x daily
 - From Toronto: Air Canada: YYZ-PDX & PDX-YYZ, 1 x daily
 - From Calgary: WestJet: YYC-PDX, 2 x daily (operated by WestJet Encore)

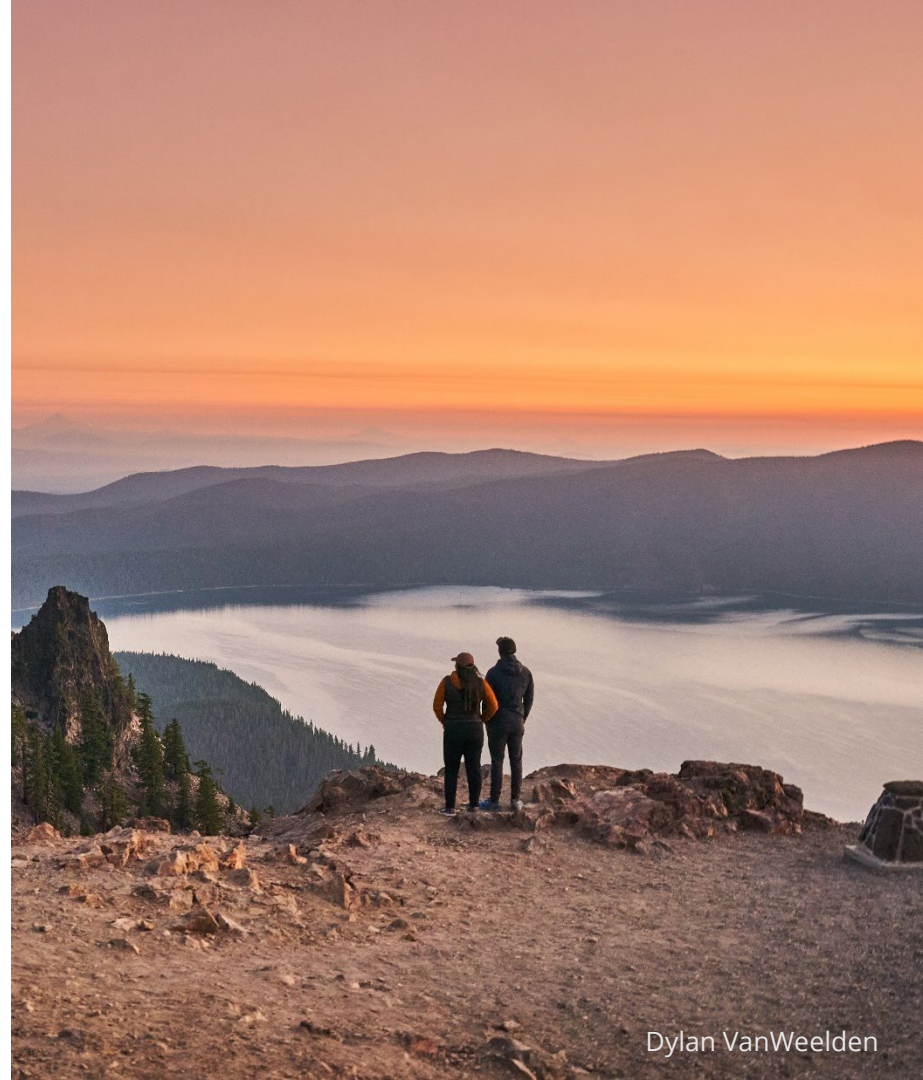


CANADA MARKET TRENDS & SEGMENTS

- Luxury/exclusivity
- Wellness / conscious travel
- Outdoor spaces
- Live like a local - longer stays, more meaningful experiences
- Indigenous tourism
- Road trippers: Self-drive travelers looking for the ultimate Oregon road trip
- Outdoor Adventurers: Active enthusiasts who travel to ski, hike, bike & explore
- Urban Explorers: Travel to experience Oregon's culinary treasures, special events & cultural highlights

CANADA MARKET FUTURE TRENDS

- Flexcations more popular
- The return of price and value prioritization



CANADA 23/24

CONSUMER

- Vancouver Outdoor Adventure Show
- Vancouver CANUCKS Professional Hockey Team Partnership
- Brand USA investments

TRADE

- Authentik USA FAM Tour and Webinar Training
- New this year: Brand USA Canadian Travel Trade Sales Mission 2024

AIRLINE PARTNERS

- Air Canada
- WestJet

MEDIA

- In Market Representation to field Paid and Earned Media opportunities
- Press Trips and FAMS

VANCOUVER CANUCKS

Travel Oregon and Vancouver Canucks Partnership

- Largest fanbase in Western Canada, 3.3M Fans in BC
- Consistent appearance of brand across all assets displaying key messaging to fans
- Leverage the partnership to connect and educate Canucks fans to make Oregon a travel choice for all British Columbians

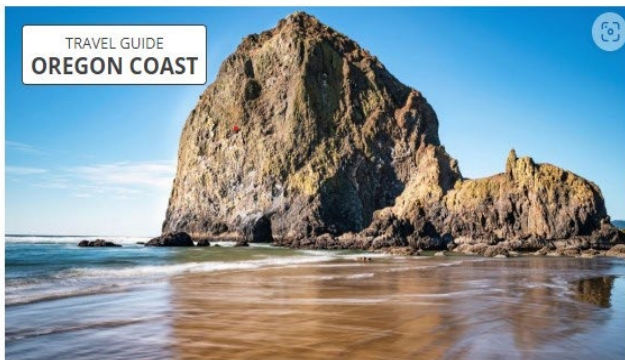


AUTHENTIK USA

Travel Oregon and Authentik USA Partnership

- Oregon trained Travel Agents
- Actively promoting Oregon as a premier destination
- Works directly with local hotels and attractions

AUTHENTIK
USA



ACCOMMODATION



Accommodation - Hotel
Kathryn Riverfront Inn

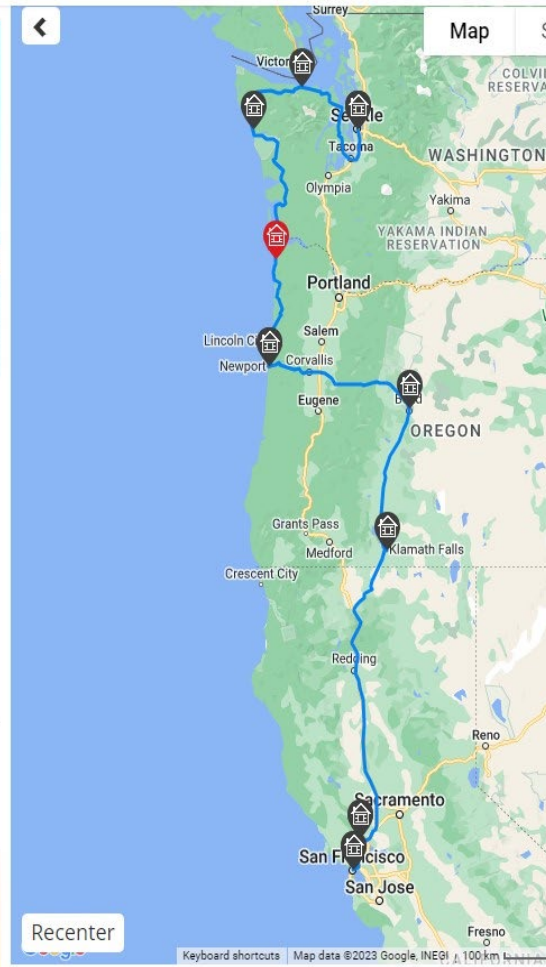
[Change my accomodation +](#)

Day 7 - Oregon Coast

[Hide details ^](#)



Road trips Car rental



GERMANY, AUSTRIA, SWITZERLAND



GERMAN MARKET SNAPSHOT

- Germany, Austria, and Switzerland make up the German-speaking market.
- German is the first language of the vast majority.

Germans have A LOT of vacation days:

- Average of 25-30 paid vacation days annually for salaried employees
- Total 35-44 days of PTO
- 10 -14 public holidays annually
- Thirteenth-month salary and/ or vacation bonus common

GERMAN MARKET AIR SERVICE

- Germany to Portland (PDX) access includes:
 - DELTA/KLM: AMS-PDX (excellent access from several German airports to AMS), Year-round, Daily
 - CONDOR: FRA-PDX, Seasonal, mid-May – mid-September, 3x per week (Tue, Fri, Sun), 2024: May 17 – Sept 22
 - ICELANDAIR: KEV-PDX (feeder flights from 4 German and 2 Swiss cities), Seasonal, beginning of May – end of December, 4-6x per week, 2024: May 5 – December 22



GERMAN MARKET TRENDS

SEE & DO

- Pristine destinations
- Soft adventure (rafting, zip-lining, hiking)
- Shopping (brands & outlets)
- Sightseeing (must-see attractions, Instagram spots)
- Informative and entertaining city tours (walking tours, bike tours, themed tours)
- Foodie/culinary tours, wine and craft beer culture
- Famous places (e.g. from movies or celebrities)
- Road trips

INSPIRATION

- Family and friends - their experiences and recommendations
- Articles in newspapers and magazines
- Online/Social media
- Internet search engines etc.
- Radio and TV features

SPENDING

- Average Daily Spend in 2022: \$300 - \$350
- Paid an average of 30% more for vacation since the pandemic
- Generally, travel spending is at an all time high
- The average spend for a US trip per booking is approx. \$9,000

GERMAN MARKET FUTURE TRENDS

- Flexibility in booking procedures
- Safety in a destination
- Authenticity, hospitality, and good monetary value
- Sustainability



KEY TOUR OPERATORS IN GERMANY, AUSTRIA AND SWITZERLAND

GERMANY

- CANUSA
- America Unlimited
- FTI
- Argus Reisen
- CRD
- DER Touristik
- Faszination Fernweh
- Turlane

SWITZERLAND

- Hotelplan
- Knecht Reisen
- Go2Travel
- Para Tours
- Kuoni

AUSTRIA

- Amerikareisen.at (in 2023 bought by America Unlimited)

NEW OREGON PRODUCT

GERMANY

- ADAC/CRD: Electric Vehicle Fly Drive Tour
- Faszination Fernweh: 16-day Oregon-only Fly Drive Tour (all 7 regions)
- Turlane: 14-day Oregon-only Fly Drive Tour (all 7 regions)
- TUI: Oregon-only fly drive tour (TBC)
- CANUSA: possibly Why Guides offers
- Diamir: working on an Oregon RV product with Cruise America

SWITZERLAND

- Hotelplan: 16-day Oregon-only Fly Drive Tour (all 7 regions)
- Para Tours: OR-WA fly drive tour (already have a 16-day, all regions OR-only fly drive tour in their program)

GERMAN MARKET TRAVEL PRODUCT

The screenshot shows a travel website interface. At the top, there are social media icons for Instagram and Facebook, a phone number (+49 6231 8379640), and an email address (info@true-america.de). The main header includes the brand name 'T.r.u.e. America', a logo, a search icon, a 'Termin' button, and a 'Menü' button. The main content area features a background image of a lighthouse. On the left, there is a 'WESTKÜSTE' button and three icons representing people, a heart, and trees. The main title is 'Die Wunder Oregons', followed by a descriptive paragraph: 'Auf dieser 16-tägigen Tour könnt Ihr die atemberaubenden Wunder des Bundesstaates Oregon erkunden. Lasst Euch bezaubern!'. At the bottom left, there is a breadcrumb link 'Startseite > Westküste'. On the right, a yellow box displays the price 'ab 2.399 € pro Person' and a list of inclusions: '✓ Flug', '✓ Hotels', '✓ Mietwagen', '✓ Versicherungsschein', and '✓ Insidertipps'. A 'Angebot anfordern' button is located at the bottom of this box.

Instagram Facebook +49 6231 8379640 info@true-america.de

T.r.u.e. America

WESTKÜSTE

Die Wunder Oregons

Auf dieser 16-tägigen Tour könnt Ihr die atemberaubenden Wunder des Bundesstaates Oregon erkunden. Lasst Euch bezaubern!

Startseite > Westküste

ab 2.399 €
pro Person

- ✓ Flug
- ✓ Hotels
- ✓ Mietwagen
- ✓ Versicherungsschein
- ✓ Insidertipps

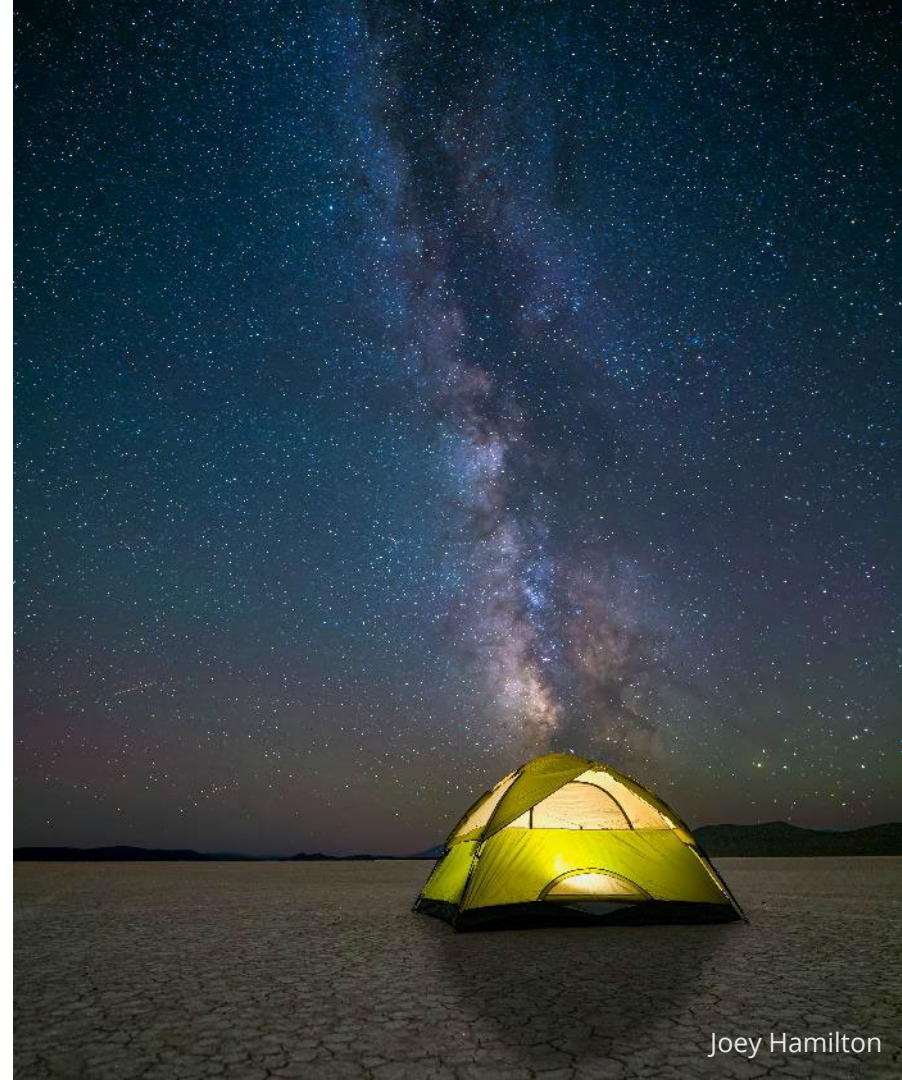
Angebot anfordern

JAPAN



JAPAN MARKET SNAPSHOT

- Stock prices increased 30% YTD
- Unfavorable currency exchange
- Low inflation
- January -May 2023 travel to US is 36% of 2019 numbers
 - 347% increase over 2022
- Post-pandemic self-restraint lingers



JAPAN MARKET AIR SERVICE

To Portland

Delta Air Lines is planning to launch Haneda
– Portland direct flight in Fall 2023 or Spring
2024.

To Seattle

(From Narita- NRT)

JL: Japan Airlines - Daily

(From Haneda -HND)

NH: All Nippon Airways - Daily

DL: Delta Air Lines - Daily

To San Francisco

(From NRT / HND)

JL: Japan Airlines – Daily (*both airports)

NH: All Nippon Airways – Daily (*both
airports)

UA: United Airlines – Daily (*both airports)

ZG: ZIPAIR Tokyo – 5 days a week (*NRT
only)

(From KIX)

UA: United Airlines – Daily

To Vancouver, Canada

(From NRT / HND)

AC: Air Canada – Daily (*both airports)

NH: All Nippon Airways – Daily (*both
airports)

JL: Japan Airlines – Daily (*NRT only)
(From Osaka- KIX)

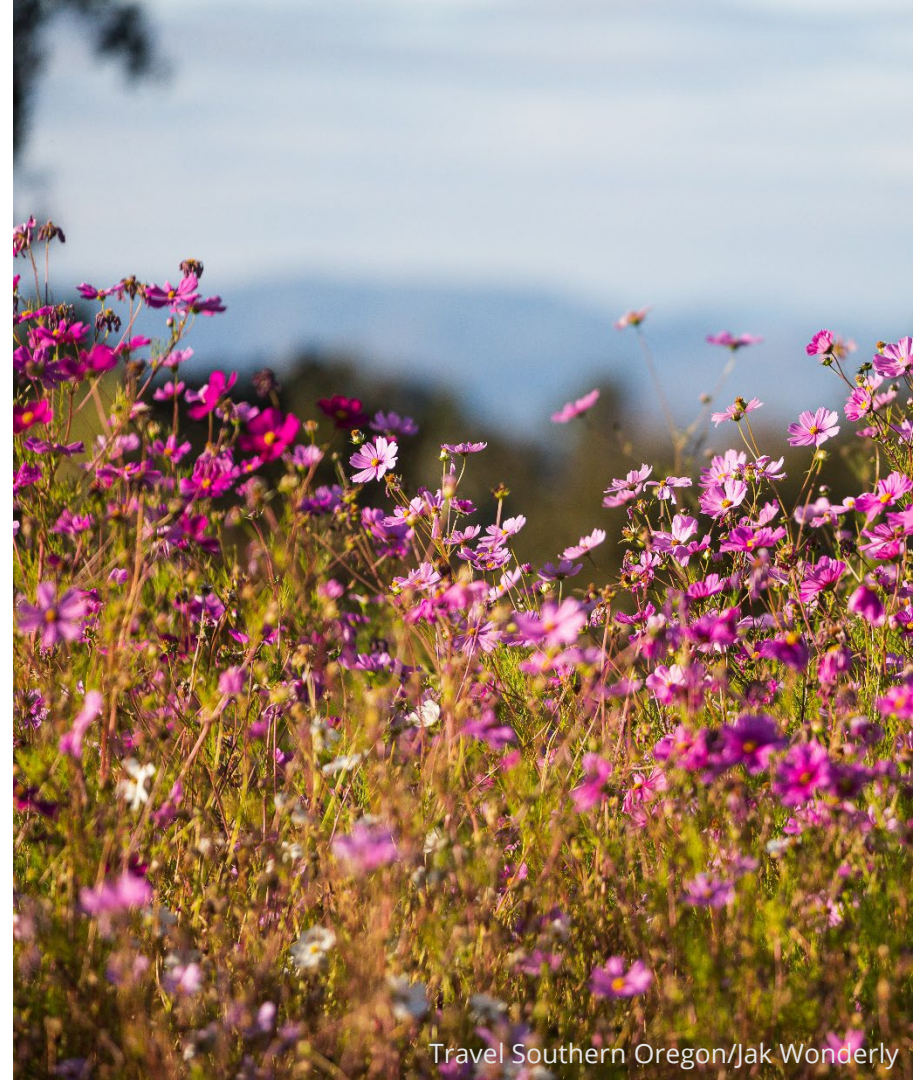
AC: Air Canada – 4 Days a week (summer
only)

JAPAN MARKET TRENDS

- Value for money: Travel to the USA offers more than enough emotional and experiential value to compensate for the increased cost.
- Ease of travel: There are concerns regarding the difficulty of travel to Europe (the major long-haul competing destination), especially to France.
- New ideas: untapped experiences and attractions, seeing the outdoors with a guide!
- Detailed information closely tied with product development: tariff, connectivity with Japanese receptive operators
- Gesture of welcoming back Japanese travelers: Japanese language information

JAPAN MARKET FUTURE TRENDS

- Higher interest in Wellness-themed travel
- Emphasis on Sustainability
- Higher interest in Workcation (Working Vacation)
- Traveling with a Purpose



KEY TOUR OPERATORS FOR OREGON

FIT Package Tours

- H.I.S
- JTB

Escorted Tours

- JTB
- JST
- Hankyu Travel International, etc.

Groups (Educational Trips, etc.)

- JTB
- TOBU TOP TOURS
- Nisshin Travel Service, etc.



UNITED KINGDOM

An aerial photograph of a vast vineyard in Southern Oregon. The foreground shows neat rows of grapevines with some leaves turning yellow. A dirt road runs alongside the vines. In the middle ground, there are more vineyard sections, some with green leaves and others with yellowing foliage. A small farmstead with several buildings is visible. The background features rolling hills and mountains covered in dense evergreen forests under a clear blue sky.

UK MARKET SNAPSHOT

- New King & new Prime Minister
- Slow GDP growth at 0.2%
- Inflation gradually falling but high interest rates
- Poor currency exchange
- UK outbound travel increasing
- Forecasted return to pre-pandemic travel in 2024
- Number one overseas market for Oregon
- London Heathrow top foreign airport serving US



UK MARKET AIR SERVICE



Launched service in June 2022

SCHEDULE

Summer 2023

- Daily service operated by Boeing 777-200
- Total seats 235: 8 First, 49 Club, 40 WT+ and 138 economy

Winter 2023/24

- Up to 4 services per week operated by the Boeing 787
- Totals seats 214: 35 Club, 25 WT+ and 154 economy



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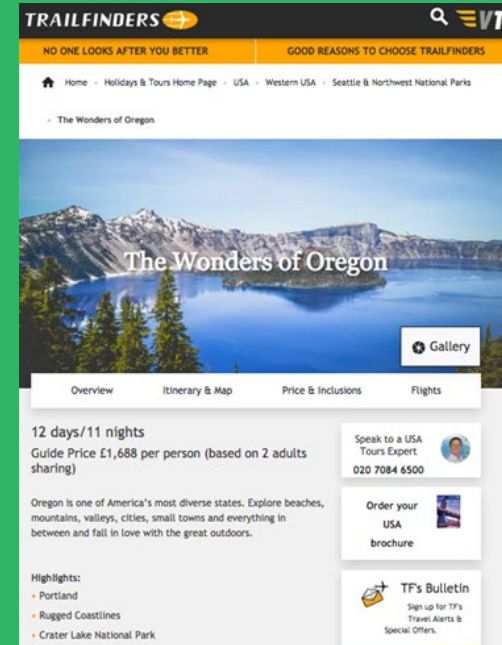
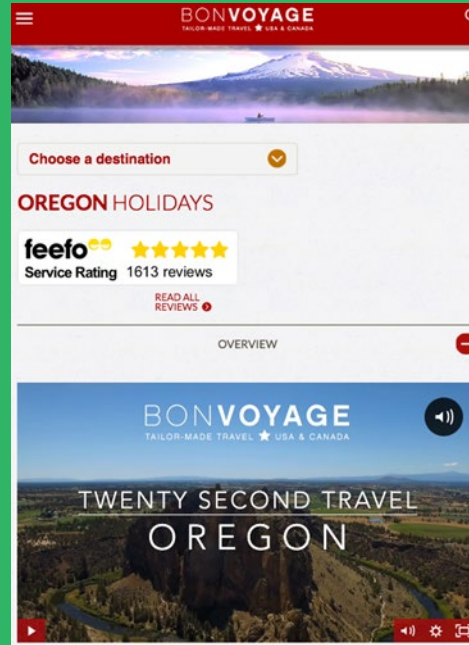


UK MARKET TRENDS

- Continued pent-up spending power and desire for a 'trip of a lifetime'
- Sustainable tourism
- Airfares remain high
- Higher booking revenue
- Boutique and/or unique accommodations
- Multi-generational travel

KEY TOUR OPERATORS IN UK

- America As You Like It
- AmeriCan & Worldwide Travel
- American Sky
- Audley Travel
- British Airways Holidays
- Bon Voyage
- Flight Centre
- North America Travel Service
- Trailfinders
- Wexas Travel



UK MARKET NEW PRODUCT

SCOTT DUNN

- Extraordinary Pacific Northwest

BON VOYAGE

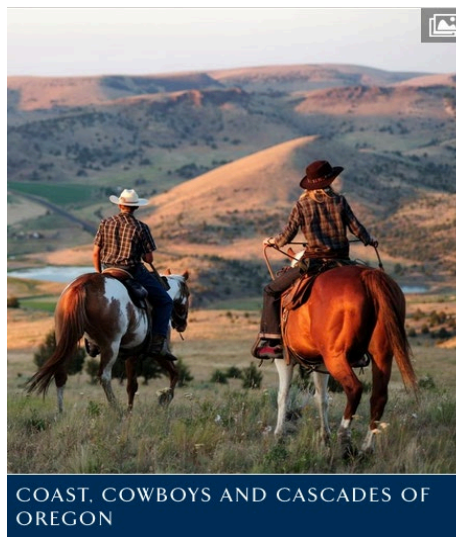
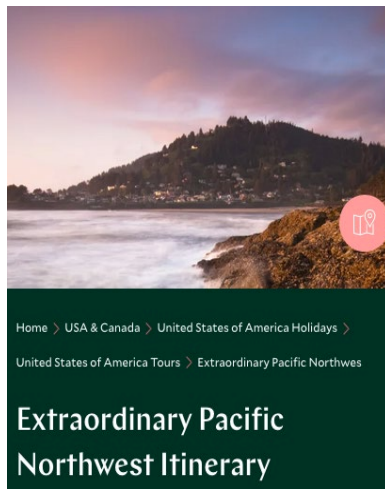
- Exploring the Oregon film Trail
Fly-drive

RED SAVANNAH

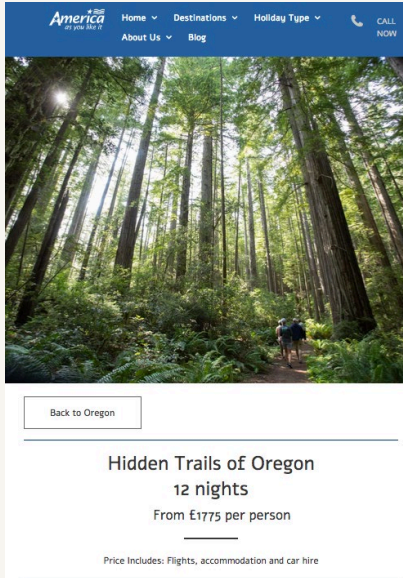
- Coast, Cowboys and Cascades of
Oregon Fly-drive

AMERICAN SKY

- Wonders of Oregon by
Motorhome



UK MEDIA TRAVEL OREGON DOMINATED THE 2023 VISIT USA MEDIA AWARDS



- Held in London on the 4th of July.
- Aaron Millar from Armchair Productions scooped the Best Broadcast Award for Travel Oregon's podcast series *The Hidden Trails of Oregon*.
- Abi Jackson from PA Media won Best Regional Newspaper Feature for her article *A Special City Full of Surprises*, following her participation in the British Airways inaugural Portland flight press trip in June 2022.

US TRAVEL ASSOCIATION'S ESTO MERCURY AWARD-HIDDEN TRAILS OF OREGON PODCAST



- Award for Outstanding Video, Film or Podcast Series
- 90,000 downloads
- 60,000 hours of engagement



RHS HAMPTON COURT PALACE GARDEN FESTIVAL

THE OREGON GARDEN



- Exhibited alongside Brand USA & Trailfinders at this annual week-long flower show that attracts over 130,000 visitors over 7 days.

TRADE EVENT & MEDIA CAMPAIGNS

- Engaged with product managers, commercial managers and luxury travel agents during two separate hosted events and welcomed other VIP visitors to the Oregon Garden and to enjoy a taste of Oregon wine.
- Bespoke content was included in The Times and Telegraph Newspapers.



An aerial photograph of a winding river flowing through a vast, green, grassy landscape. The river is dark blue and meanders across the terrain, which is dotted with small, dark green shrubs and patches of lighter green grass. The text "Thank you" is overlaid in the center of the image in a white, serif font.

Thank you