

A group of cyclists is riding across the Steel Bridge in Portland, Oregon. The bridge is a large steel truss structure with a wide, paved path for cyclists. In the background, the city skyline is visible, featuring several modern high-rise buildings. The sky is overcast, and the water of the river below is calm. The overall scene is a mix of urban infrastructure and recreational activity.

OREGON TOURISM COMMISSION MEETING

DECEMBER 6, 2023

TRAVEL
PORTLAND



JEFF MILLER
President & CEO

SMITH TRAVEL RESEARCH

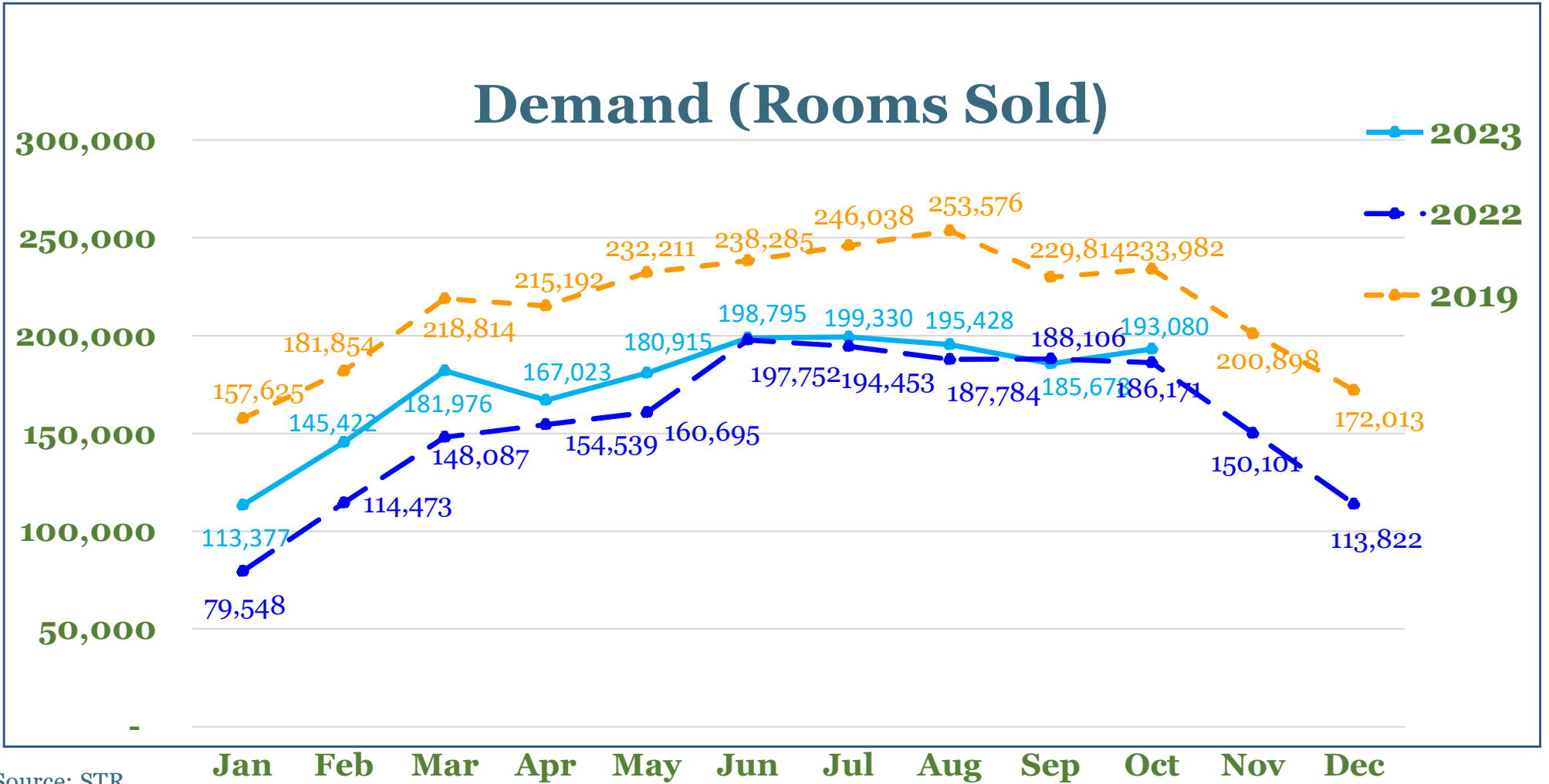


PORTLAND HOTEL COMP SET COMPARISION DOWNTOWN (October 2023)

	Current Month - October 2023 vs October 2022						Year to Date - October 2023 vs October 2022					
	Occ %		ADR		Room Rev	Room Sold	Occ %		ADR		Room Rev	Room Sold
	2023	2022	2023	2022	Percent Change from October 2022		2023	2022	2023	2022	Percent Change from YTD 2022	
Downtown / CBD												
Denver Downtown	75.6	76.1	234.57	224.29	5.6	1.0	71.2	68.3	216.64	204.99	12.2	6.2
Seattle CBD, WA	76.3	75.3	226.92	223.09	3.8	2.0	70.6	67.3	231.37	218.76	14.8	8.6
Salt Lake Downtown+	70.2	69.5	167.53	162.50	4.2	1.0	69.4	67.0	169.87	164.42	7.0	3.6
San Diego CBD, CA	75.4	76.9	256.82	255.88	-0.6	-0.9	76.5	73.6	257.66	248.14	8.5	4.5
Phoenix Central, AZ	71.1	69.4	232.91	219.38	7.4	1.2	68.8	65.7	222.66	203.71	14.2	4.4
Nashville CBD, TN	84.0	84.3	330.49	327.50	2.8	1.9	77.4	75.4	298.86	286.32	13.9	9.1
Austin CBD, TX	76.4	78.7	356.31	349.85	2.1	0.3	69.6	70.1	262.43	253.24	5.6	1.9
San Antonio CBD, TX	64.1	66.9	177.74	192.22	-9.3	-1.9	63.0	63.6	174.44	175.05	3.2	3.6
Minneapolis CBD, MN	64.5	55.4	193.53	181.46	28.4	20.4	54.0	48.7	173.20	169.00	21.2	18.3
San Francisco Market St, CA	65.1	65.9	252.29	242.66	3.3	-0.6	62.5	60.5	254.61	234.57	19.8	10.3
Anaheim - Disneyland, CA	82.5	85.5	268.92	246.01	7.2	-2.0	76.9	75.1	242.71	228.96	8.8	2.6
Long Beach, CA	75.1	75.3	183.20	174.80	7.2	2.3	74.2	74.2	182.50	168.57	9.7	1.3
Vancouver, BC Downtown	80.6	79.5	229.35	193.45	20.2	1.3	80.5	72.4	246.29	224.25	22.6	11.6
Portland Central City+	61.9	59.7	165.63	168.14	2.3	3.8	57.7	52.8	164.61	164.83	9.2	9.4

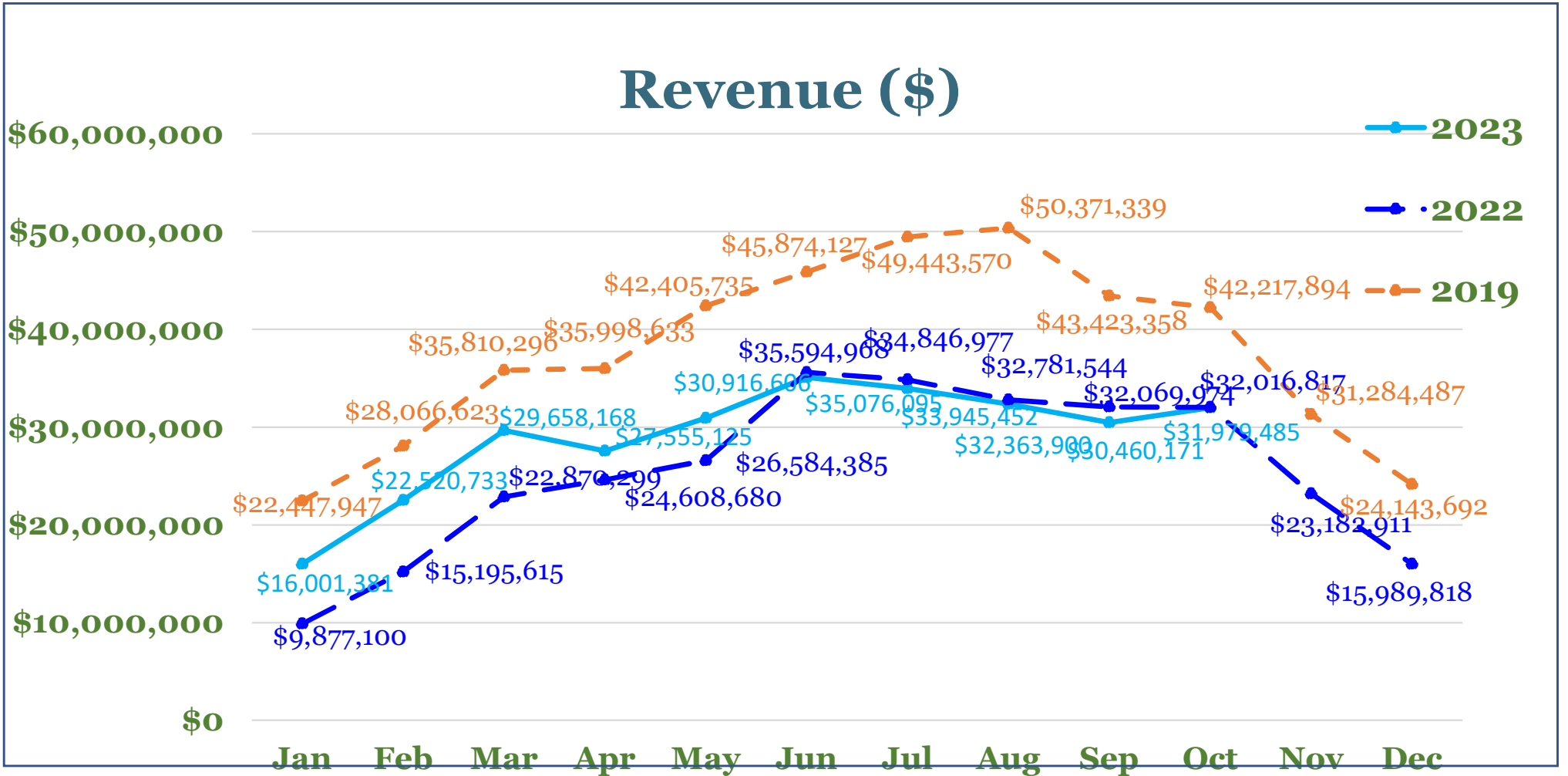
*This represents compound growth on top of a significantly stronger 2022 in these destinations

PORTLAND HOTEL PERFORMANCE: CENTRAL CITY



Source: STR

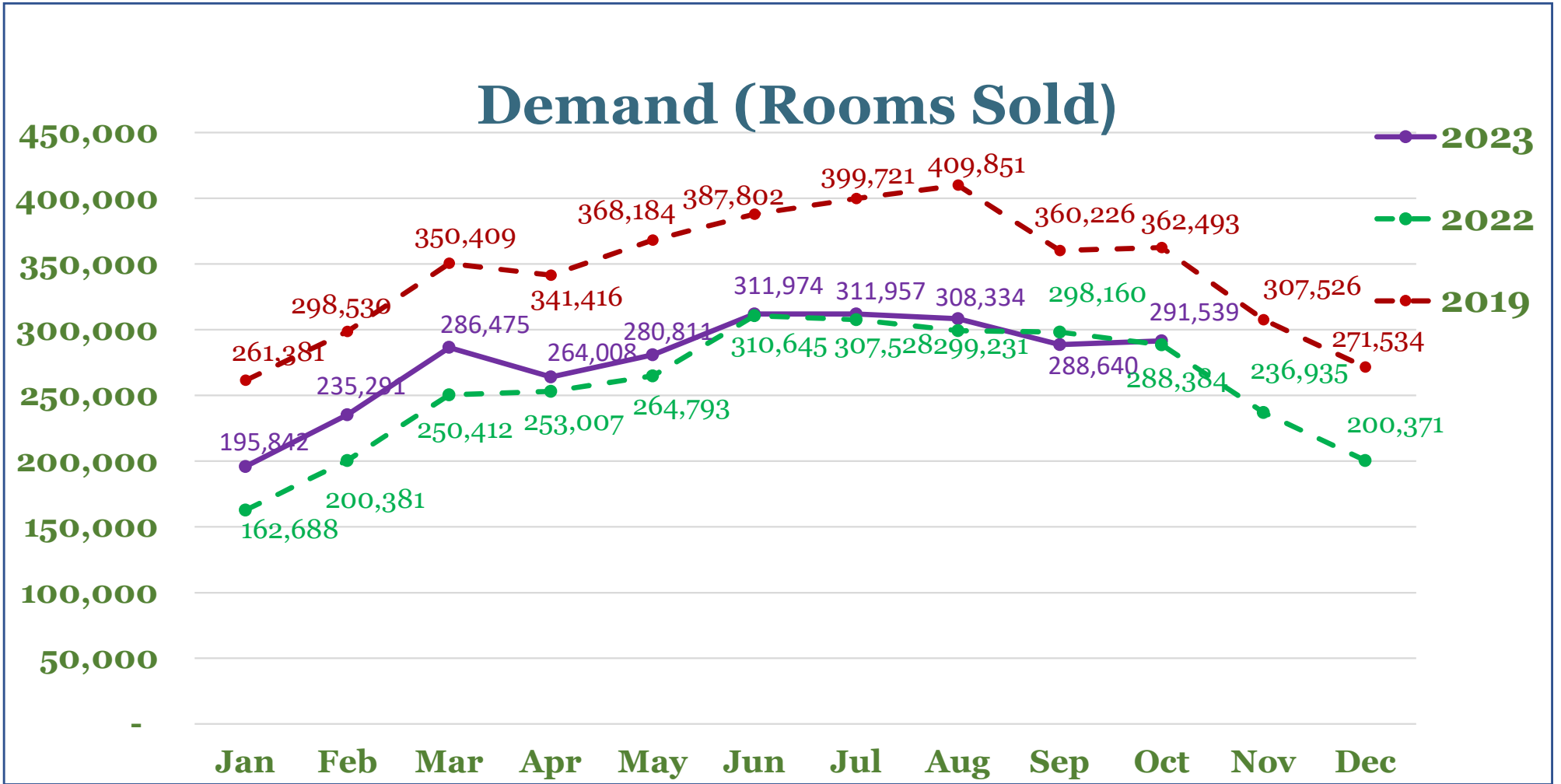
PORTLAND HOTEL PERFORMANCE: CENTRAL CITY



Source: STR

PORTLAND HOTEL PERFORMANCE: CITY OF PORTLAND+

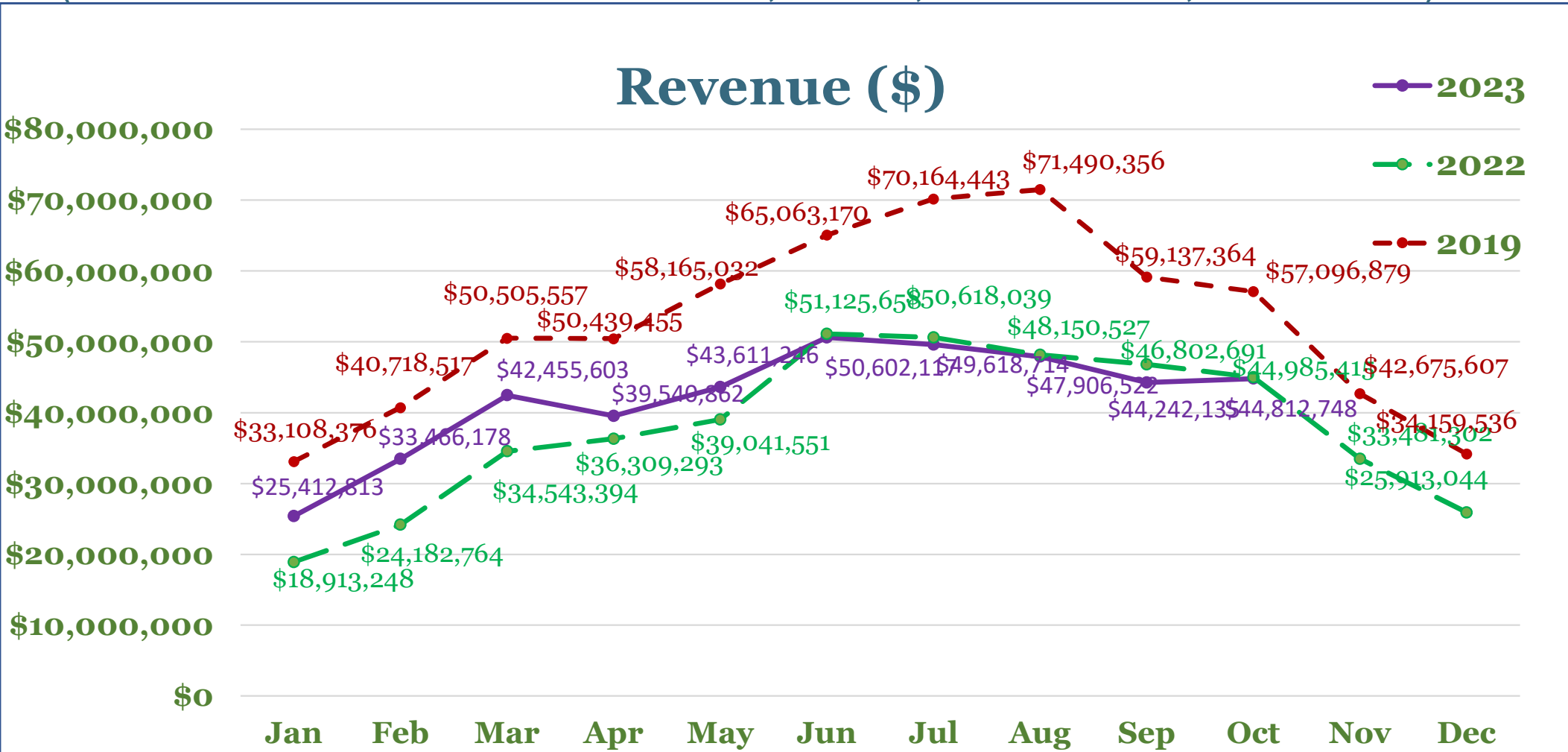
(CITY OF PORTLAND+ INCLUDES CENTRAL CITY, AIRPORT, JANTZEN BEACH, AND EASTSIDE)



Source: STR

PORTLAND HOTEL PERFORMANCE: CITY OF PORTLAND+

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



Source: STR

STR REPORT - CITY OF PORTLAND+

Revenue	2023
This Year	421,250,291
Last Year	394,374,427
Percent Change	7%

Revenue	2023									
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct
This Year	25,412,996	33,003,958	42,480,462	39,540,862	43,611,688	50,617,811	49,620,166	47,961,302	44,242,135	44,758,911
Last Year	18,911,197	24,814,813	34,556,605	36,768,520	39,069,459	51,053,789	50,545,219	48,088,126	46,614,771	43,951,929
Percent Change	34%	33%	23%	8%	12%	-1%	-2%	0%	-5%	2%

+19%

-1%

FY24 BUDGET CUT

	Budget	Slow Recovery	No Recovery	Decline
<i>% YoY (TID TLT combined)</i>	+17%	+4%	0%	-4%
<i>% of the FY19</i>	90%	80%	77%	74%
<i>Bottomline with no expense cut</i>	-	-\$2.8M	-\$3.6M	-\$4.4M
<i>Proposed program cut</i>	-	-\$1.3M	-\$2.1M	-\$2.9M
<i>Dip into Reserve</i>	-	-\$1.5M	-\$1.5M	-\$1.5M



MEGAN CONWAY
Chief Strategy Officer

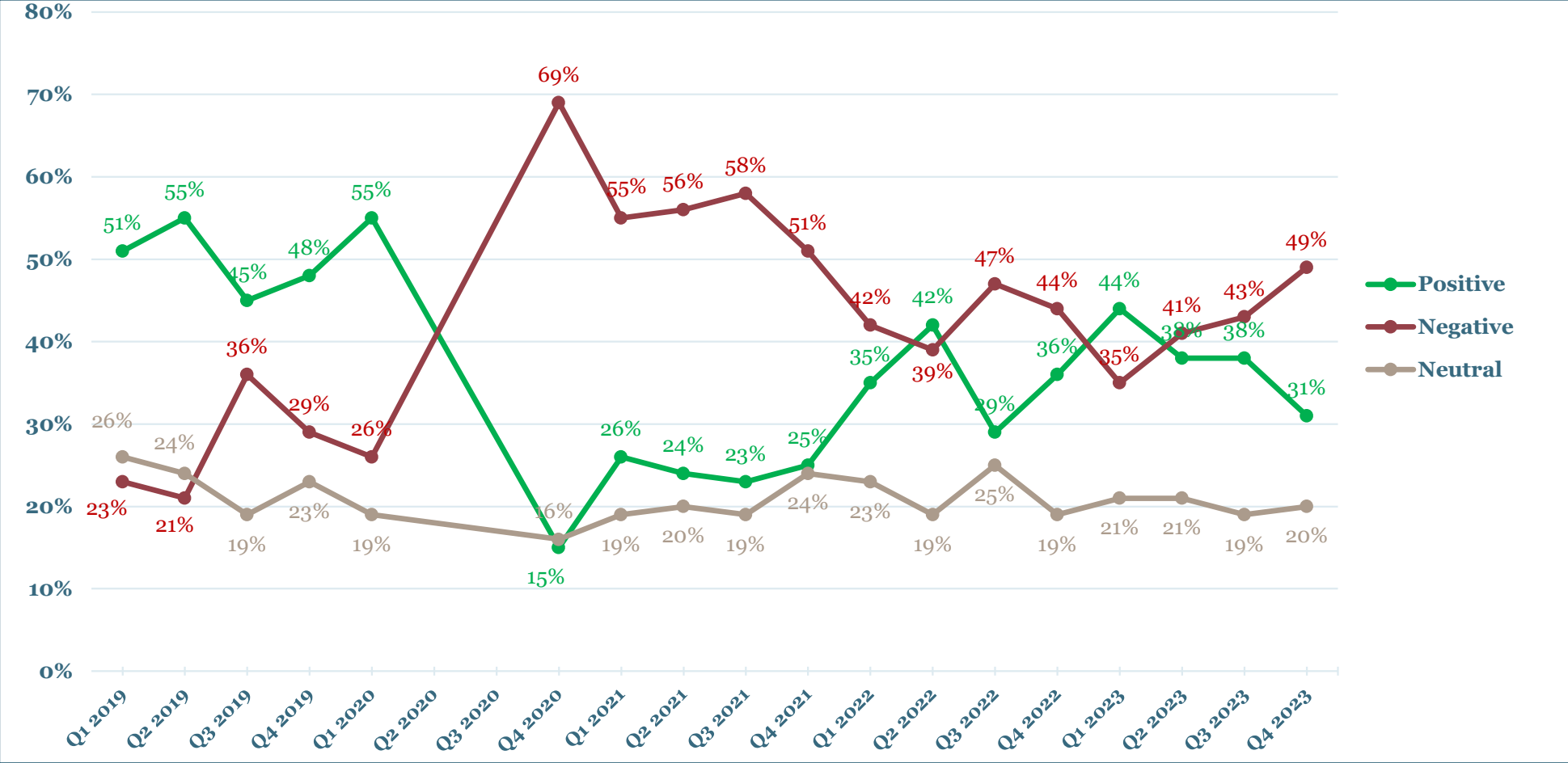
PORTLAND QUARTERLY NATIONAL CONSUMER SENTIMENT SURVEY

Q4 2023 (OCTOBER 2023)
N = 1240

TRAVEL
PORTLAND

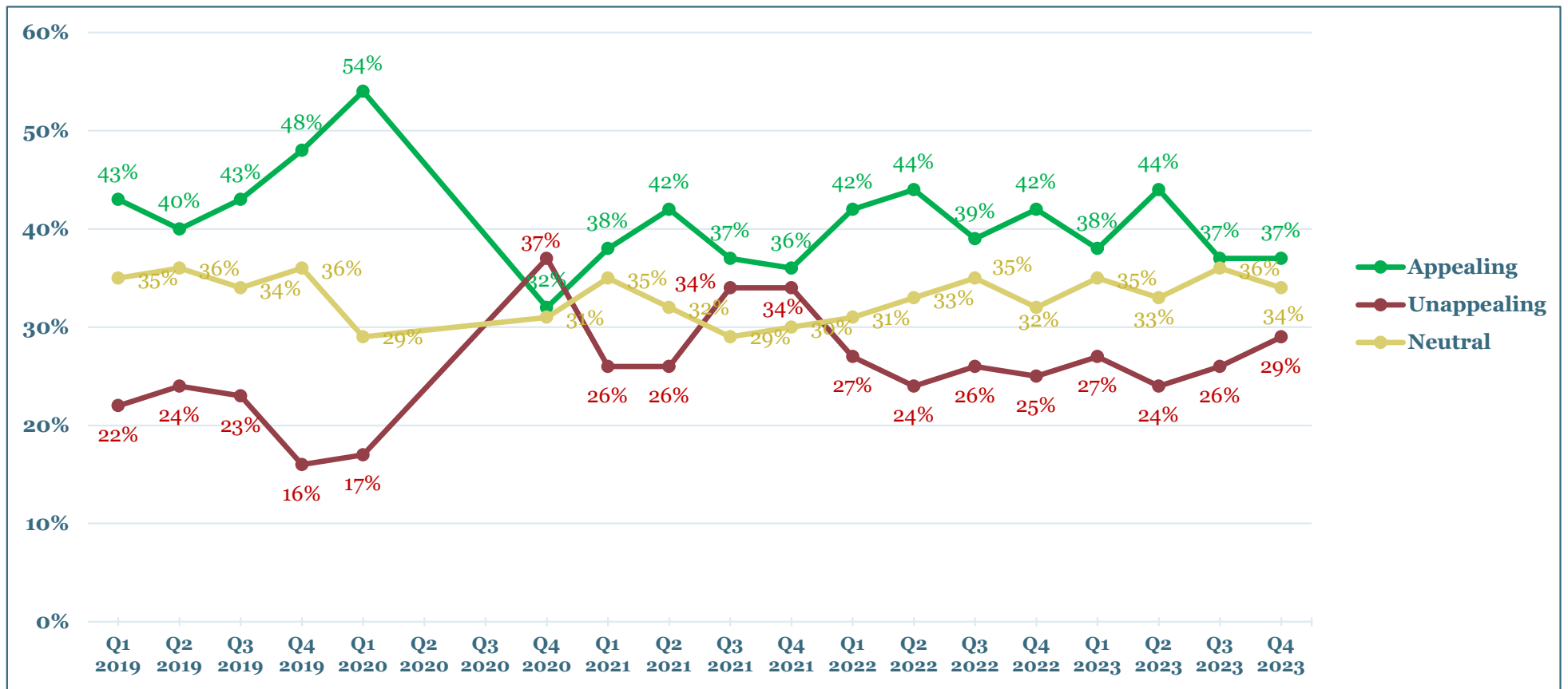
PORTLAND CONSUMER RESEARCH

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



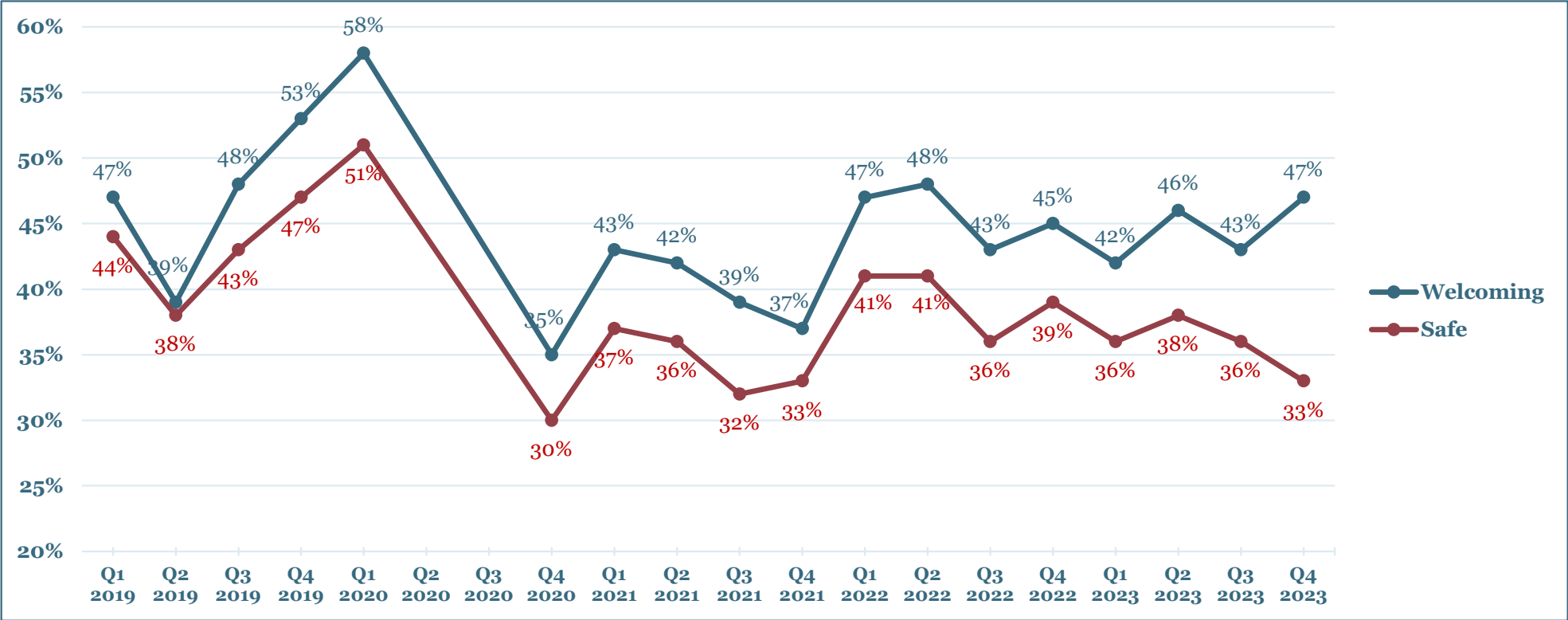
PORTLAND CONSUMER RESEARCH

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



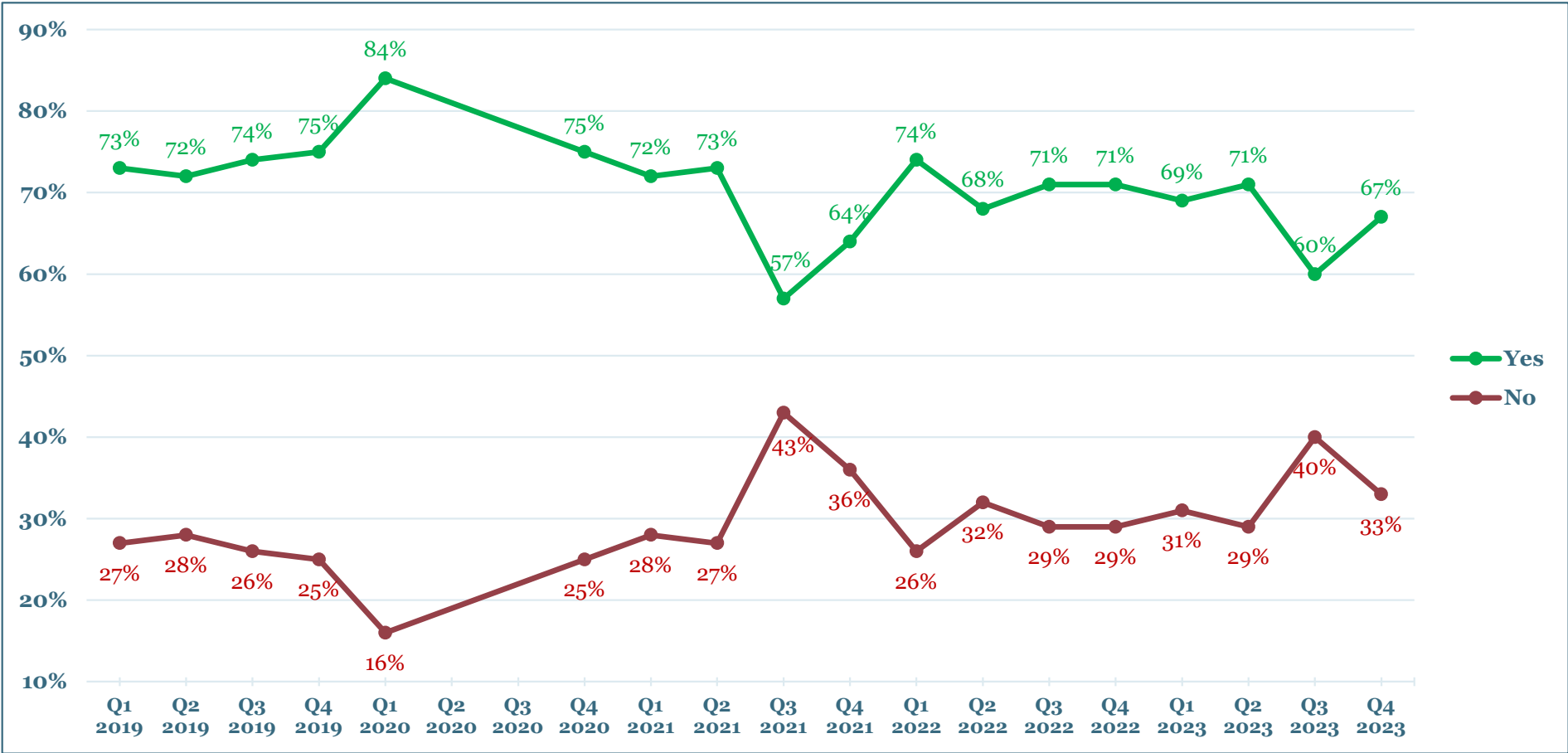
PORTLAND CONSUMER RESEARCH

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 before, are you likely to visit again?



PUBLIC RELATIONS

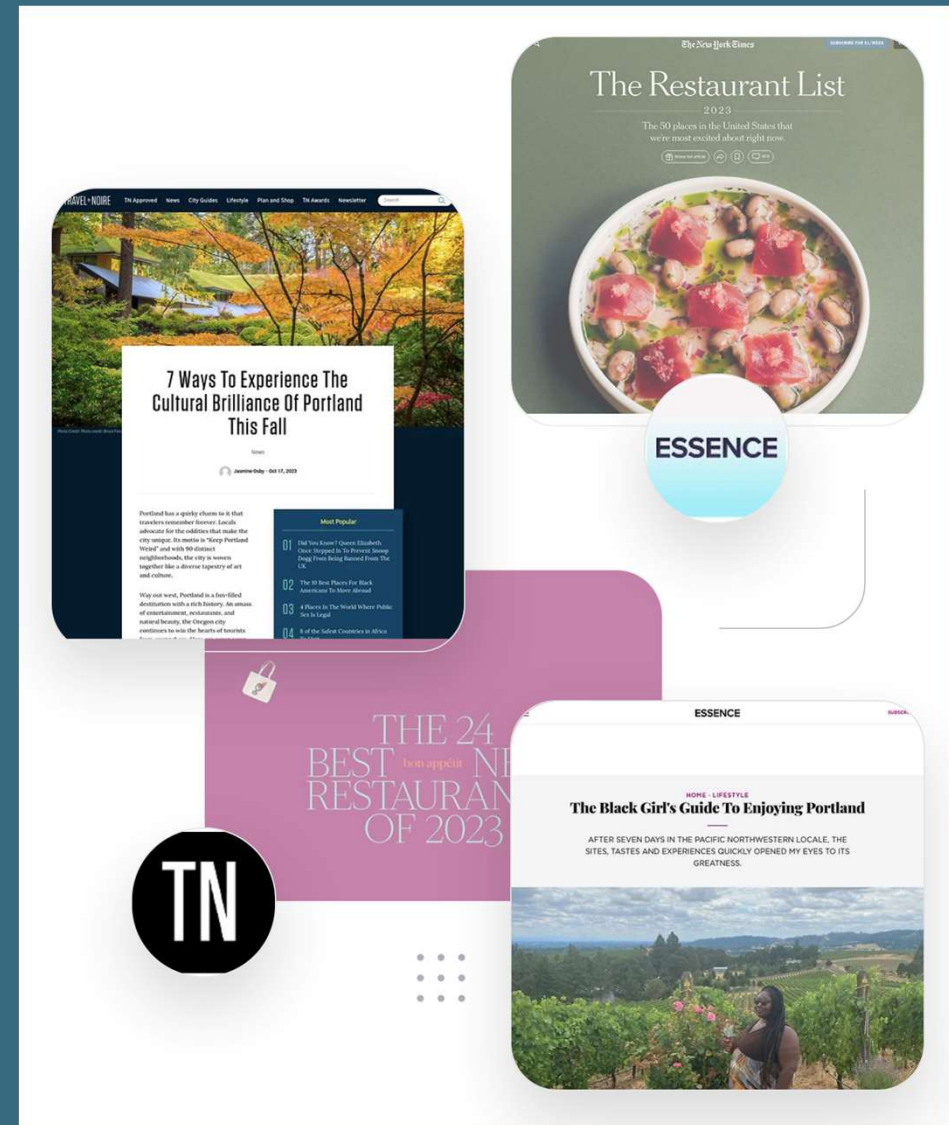


PUBLIC RELATIONS

Media interest in Portland regarding travel remains strong

2022-23

- Travel Portland hosted 115 travel journalists and content creators
- More than 320 positive media placements and 5.2 billion impressions
- More than 1,000 EDI engagements with media



THE 24 BEST *bon appétit* NEW RESTAURANTS OF 2023

A whole head of cauliflower isn't typically the sort of dish I lie awake thinking about. So imagine my surprise when I sliced into the one served at Portland, Oregon's dazzling new Haitian restaurant, Kann. Rubbed with jerk spices, cooked over a crackling wood fire, and lazing in a cooling pool of sour coconut cream, it was one of the most exhilarating things I tasted all year. Little moments of joy and wonder like this one overwhelmed us as we ate our way across the country in search of the Best New Restaurants of 2023.

The New York Times

The Restaurant List

2023

The 50 places in the United States that we're most excited about right now.

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Lilia Comedor
Portland

Cafe Olli
Portland

HOME · LIFESTYLE

The Black Girl's Guide To Enjoying Portland

AFTER SEVEN DAYS IN THE PACIFIC NORTHWESTERN LOCALE, THE SITES, TASTES AND EXPERIENCES QUICKLY OPENED MY EYES TO ITS GREATNESS.



TRAVEL+NOIRE TN Approved News City Guides Lifestyle Plan and Shop TN Awards Newsletter Search

7 Ways To Experience The Cultural Brilliance Of Portland This Fall

News

Jasmine Osby · Oct 17, 2023

Portland has a quirky charm to it that travelers remember forever. Locals advocate for the oddities that make the

Most Popular

TRAVEL+NOIRE TN Approved News City Guides Lifestyle Plan and Shop TN Awards Newsletter Search

How to Spend 24 Hours in Black-owned Portland

Black Owned Business, Destination Diaries

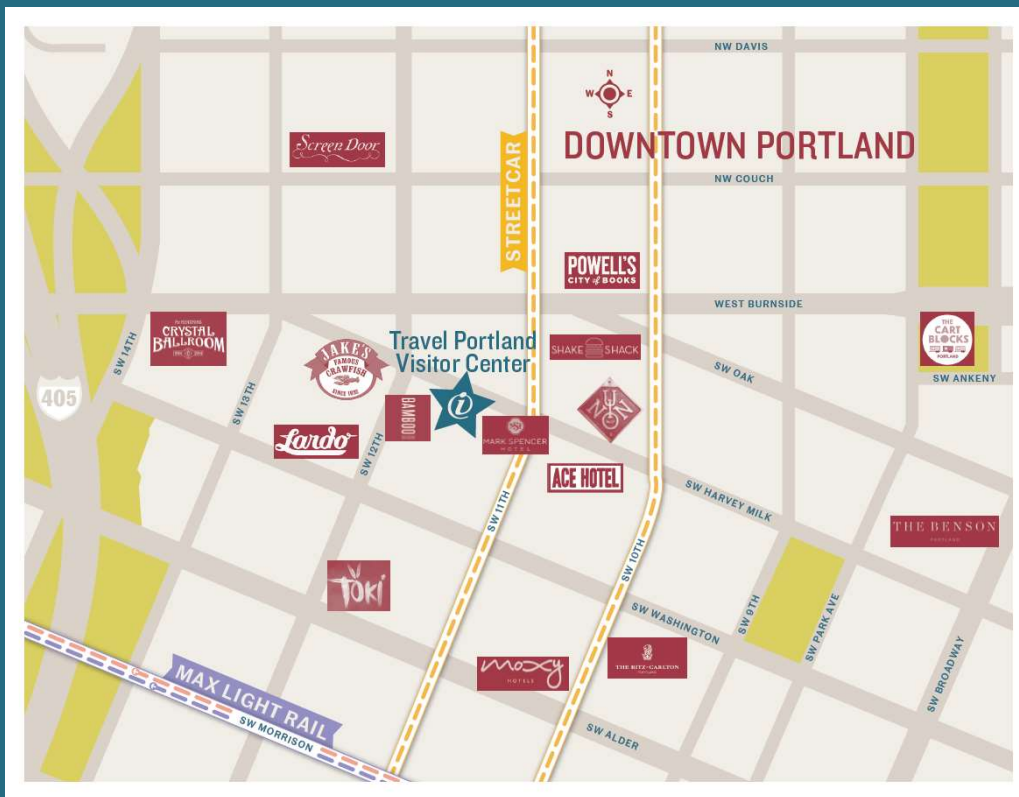
Rafael Peña · Aug 15, 2023

STRATEGIC COMMUNICATIONS

- New endeavor seeks to align messaging, open communications to improve national coverage of Portland's challenges and address decline in reputation
- Current national front page media coverage often excludes Portland stakeholders or omits how the city is responding to challenges
- Other cities have enacted similar plans in response to similar circumstances

VISITOR CENTER





- Serving visitors 7 days a week
- KultureCity Sensory Inclusive™ Certified Venue
- Activations for West End Wednesdays & Pacific NW Experience
- Pop-up visitor information at Portland Marathon, Bookfest, Holiday Press Event

MARKETING



OUR APPROACH



ALWAYS-ON + LEISURE CAMPAIGN

Month											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

PR, social, content, Adwords, OTAs

ROI per dollar of
media spend: \$62*

**PORTLAND
YOURSTOSHARE**

*Phocuswright, 2023



Every neighborhood has a story.
Every corner has a tale.
Every street holds a legacy.

It's time to share the Portland
we all know and love.

DESIGN DIRECTIONS



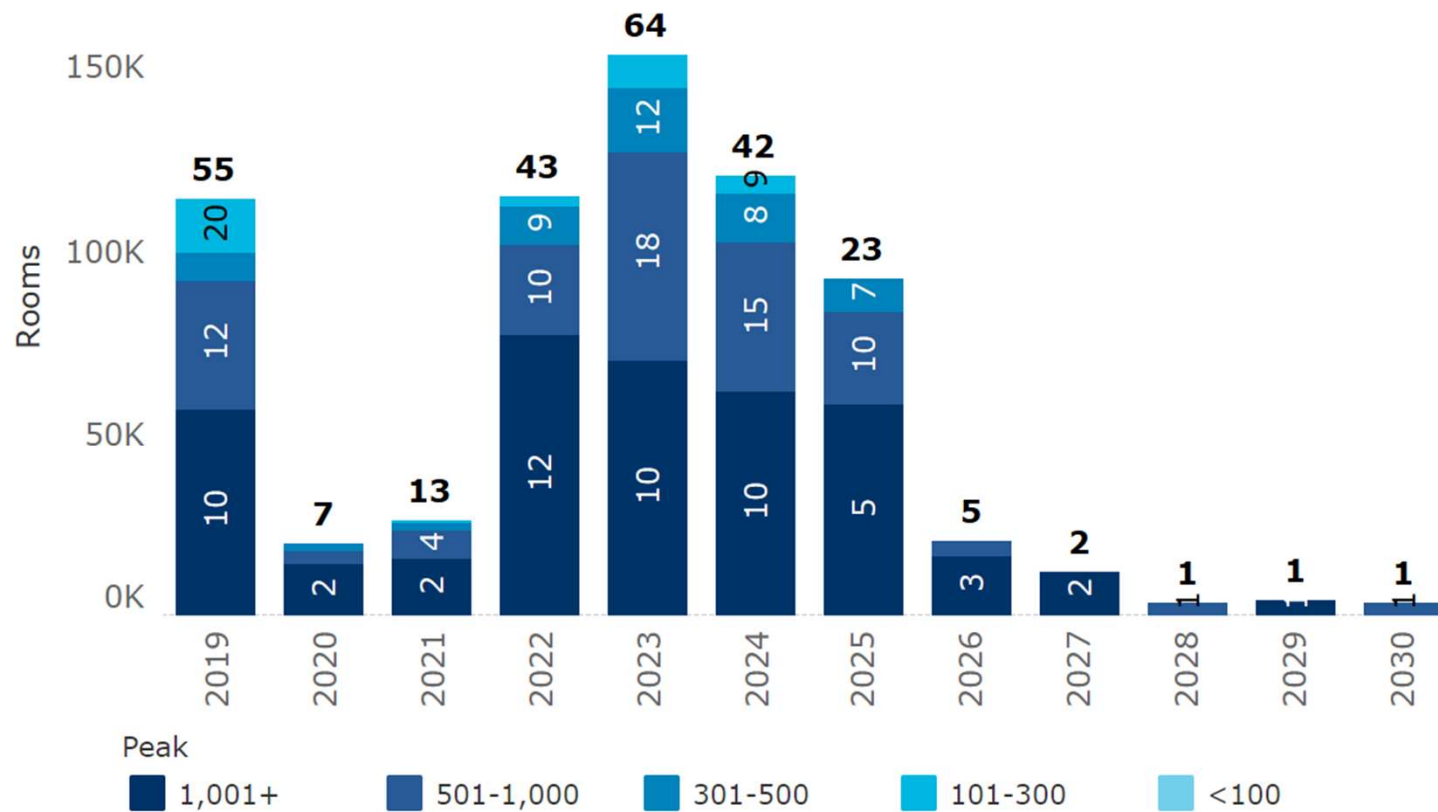
CONVENTION SALES



CONVENTION MARKET HEADWINDS

Booked Room Nights

Events and requested room nights



PORTLAND CITYWIDE BOOKINGS

Booked Room Nights by Year & Month

Total requested room nights currently on the books by event date

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2019	2.1K	7.8K	18.0K	10.3K	13.9K	5.8K	17.9K	2.0K	13.8K	7.0K	6.1K	10.6K	115.4K
2020	3.8K	11.2K	5.7K										20.7K
2021						30		2.9K	11.3K	10.4K	1.7K	1.4K	27.7K
2022	641	3.8K	27.4K	9.8K	19.4K	14.8K	10.9K	5.3K	5.7K	16.0K	1.5K	512	115.9K
2023	3.3K	7.1K	25.2K	15.0K	28.5K	14.3K	12.1K	7.4K	7.7K	13.9K	8.0K	11.8K	154.4K
2024	9.0K	13.6K	13.8K	15.6K	11.3K	19.3K	20.8K	466	1.8K	13.4K	2.2K		121.2K
2025		2.5K	8.2K	8.4K	4.8K	36.8K	5.2K	2.1K	7.6K	7.7K	9.9K		93.1K
2026	2.7K	6.4K	2.9K		3.5K					6.4K			22.0K
2027				7.3K							5.8K		13.1K
2028								4.7K					4.7K
2029									5.9K				5.9K
2030							4.6K						4.6K

PORTLAND CITYWIDE TENTATIVE BUSINESS

Open Opportunities (Rooms) by Year & Month

Click to filter table and bar chart by month & year of event

Market Segment: All

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2023										628	5,387	11	6,026
2024	2,373	6,820	7,402	6,802	7,836	12,109	7,969	5,642	11,710	4,060	3,755	1,425	77,903
2025	7,473	4,818	12,092	12,465	9,558	14,632	16,765	2,060	10,066	15,691	7,869	2,777	116,266
2026	850	7,653	20,129	10,994	3,557	6,930	7,410	6,597	10,106	3,711	6,328	1,315	85,580
2027	2,350	7,917	9,377	6,787		9,811	4,522	2,225		9,000	603		52,592
2028	0	3,817	1,950	3,186	8,286	0	9,803	5,380		2,190	603	0	35,215

IT PAYS TO PLAN ON PORTLAND PROMOTION

- Promotion ran
Dec. 2022 - May 2023
- 62,428 Definite Room
Nights



It Pays to Plan on
PORTLAND

Earn up to \$20,000 in room rebates
by booking an event with 25+ rooms in 2023, 2024 or 2025.

Travel Portland Incentive

- ✓ **\$20 rebate per actualized room night**, paid directly to the Group.
- ✓ **Hosted site visit in Portland** for two customers (includes airfare, airport transportation, city tour). Bidding hotel(s) to offer complimentary accommodations based on availability.



CURRENT HOTEL BUSINESS PROMOTION



Plan on
PORTLAND
and Profit!

Unlock room rebates up to \$7,000
for events with 50+ rooms on peak! *(see details)*



Travel Portland Incentive

- ✓ \$7 rebate per actualized room night by contracting an event with 50 or more rooms on peak night (and 150+ total rooms) in 2023, 2024 or 2025.
- ✓ Hosted site visit for one customer (includes airfare, airport transportation, city tour). Bidding hotel(s) to offer complimentary accommodations based on availability.

RECENT WINS

American Counseling Association

- March 2027
- 1350 Peak, 5,374 Total

Defense Health Agency

- April 2024
- 1,734 Peak, 6,468 Total

Association of Zoos & Aquariums

- September 2026
- 1,200 peak, 5,800 total

American Animal Hospital Association

- 667 Peak, 2,724 total
- September 2026

DIVERSE MEETINGS - COMING SOON!

Business	Date	Attendees
Center for Asian Pacific American Women	August 2023	35
Affiliated Tribes of Northwest Indians	January 2024	400
Kappa Alpha Psi Fraternity, Inc	March 2024	400
National Tribal Youth Association	July 2024	2,000

CONVENTION MARKETING

It's not only about the meeting planner anymore

From



Towards



SPORT OREGON PARTNERSHIP

Travel Portland Investment

NCAA Bid Portal

Sports ETA

SPORT[®] OREGON



THANK YOU

TRAVEL
PORTLAND

