

GLOBAL MARKET UPDATE & FORECAST

ROGERS ARENA

Plan your trip to Oregon now.



AIR CANADA

TRAVEL OREGON

FISHING IN THE DARK PRESENTED BY **TRAVEL OREGON**

SHOTS	5	LA	1	6:32	O	SHOTS	3
HITS	0			1st		HITS	8
PENALTIES	0					PENALTIES	1
BLOCKED SHOTS	0					BLOCKED SHOTS	1
FACEOFFS WON	0					FACEOFFS WON	7

TRAVEL 50/50 CURRENT TOTAL: \$117,935 LAK 5 1 6:32 O 3 VAN 50/50 CURRENT TOTAL: \$117,935 TRAVEL OREGON

WE ARE ALL CANUCKS 122 101 WE ARE ALL CANUCKS

VANCOUVER CANUCKS SPONSORSHIP



VAKANTIEBEURS TRADESHOW, THE NETHERLANDS



VISIT USA SWITZERLAND & HOLIDAY WORLD DUBLIN



DELTA AIR LINES OREGON WINE DESTINATION SEMINAR



PRIMARY MARKETS

- **Australia**
- **Canada**
- **France**
- **Germany**
- **Japan**
- **South Korea**
- **Netherlands**
- **UK**



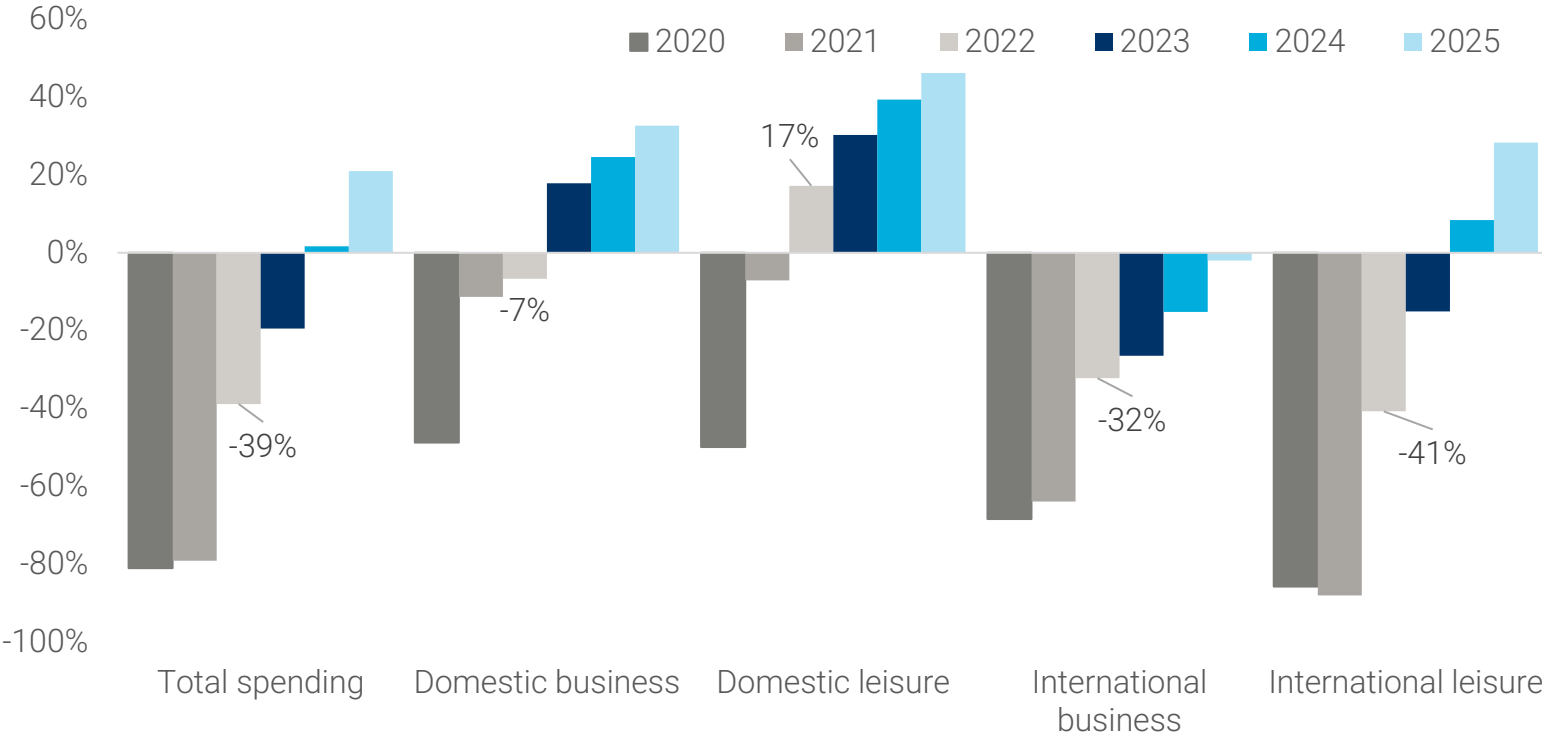


1 US inbound recovery

International visitor recovery is underway, but takes longer than the domestic recovery

Visitor spending by segments, US

Percent different from 2019, US

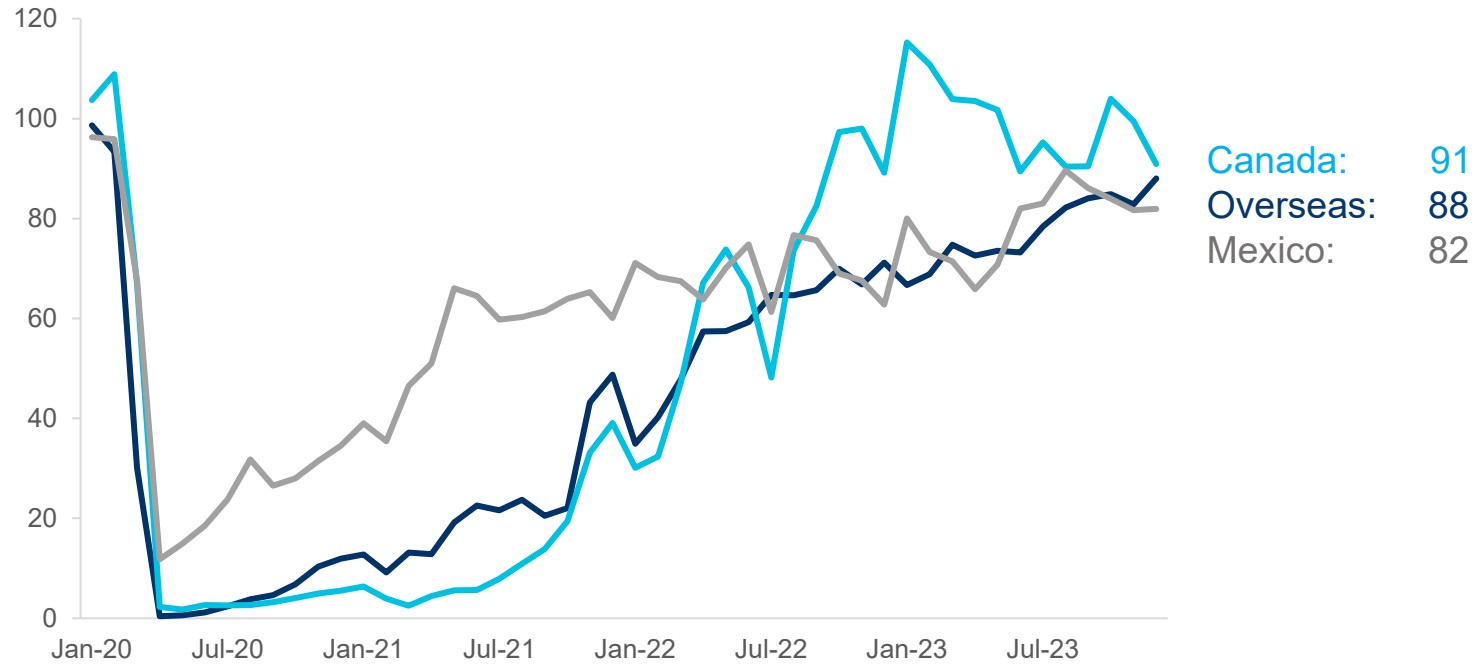


Note: Spending is nominal.
Source: Tourism Economics

International inbound is gaining momentum

International visits to USA

2019 = 100 (same month comparison)

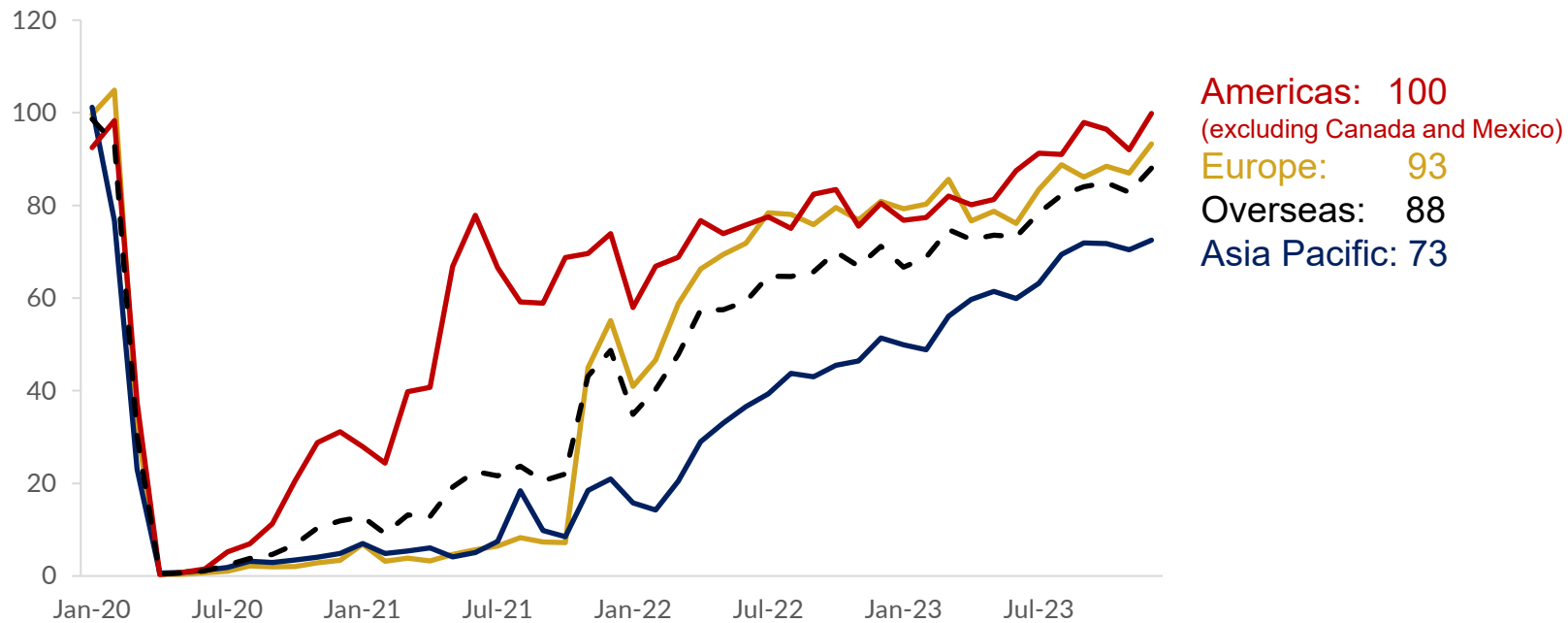


Source: NTTO, data through Dec-23

...across every overseas region

Global regions visits to USA

2019 = 100 (same month comparison)

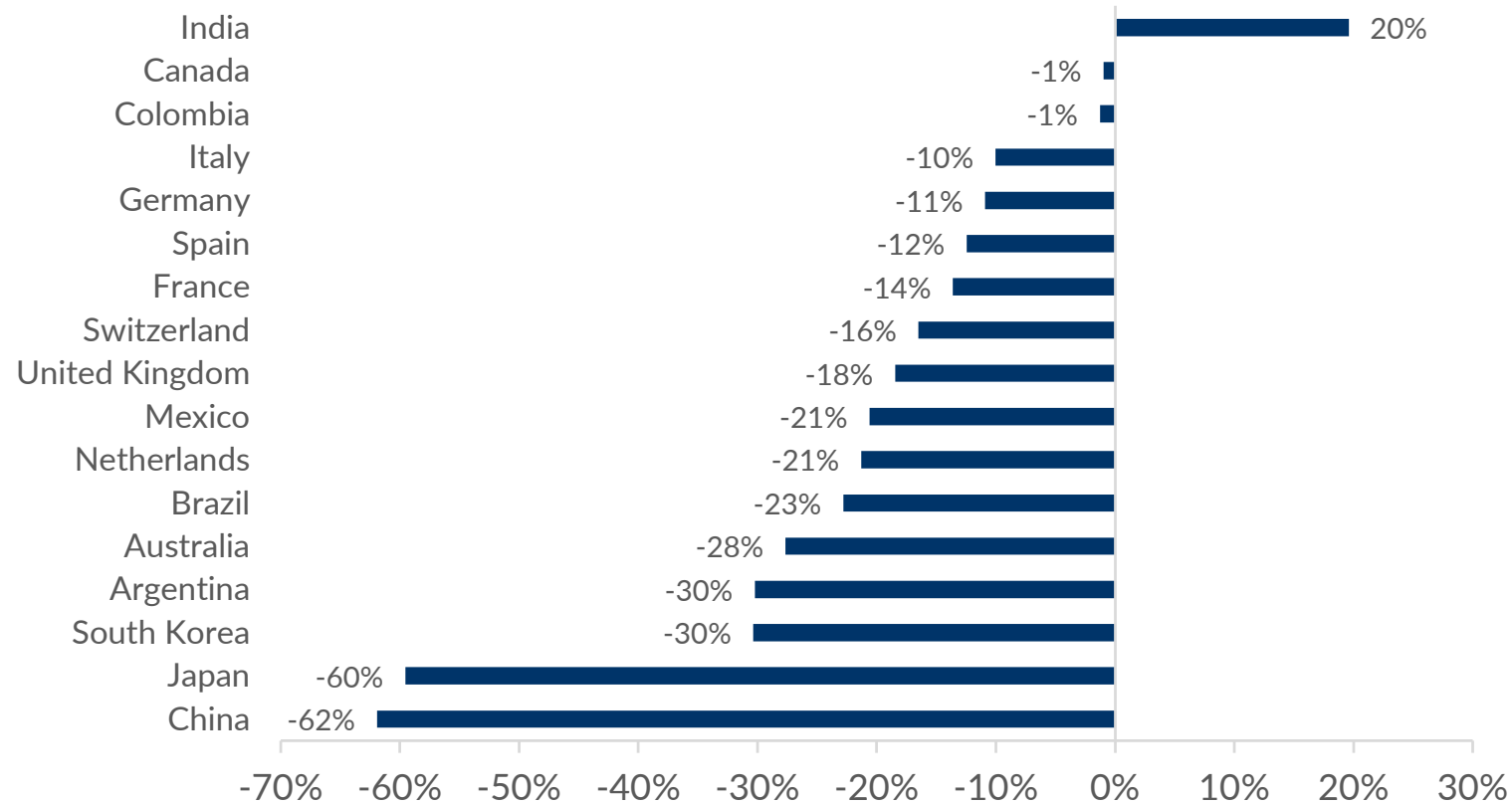


Source: NTTO, data through Dec-23

Plenty of room for growth (inbound to US)

Major source country arrivals

% change relative to 2019 (Dec 2023 YTD)



Source: I-94/ADIS

Source: Tourism Economics

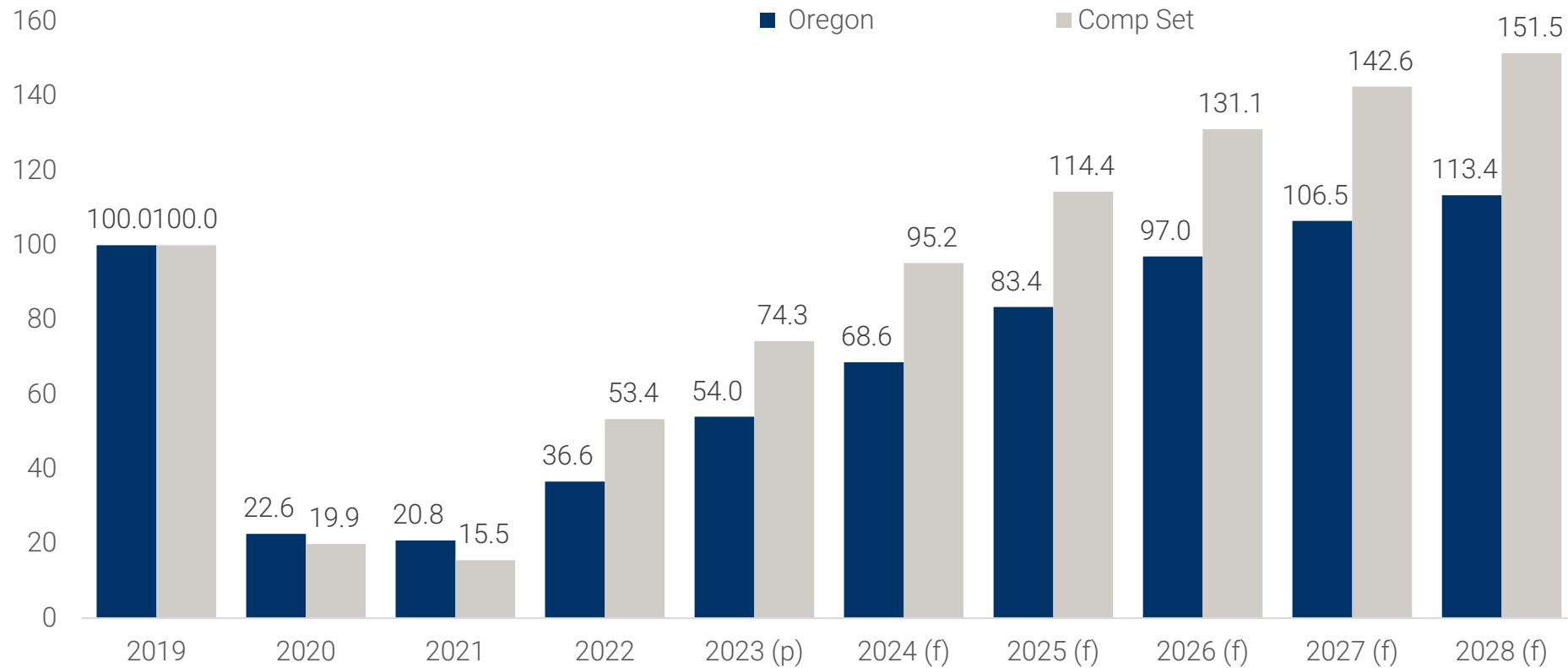
A scenic view of a river flowing through a dense forest. The river is in the foreground, with rocky banks and some fallen branches. The forest is lush and green, with tall trees lining the banks. The sky is a deep blue, suggesting a clear day. Overlaid on the image is a large white number '2' and the text 'Oregon inbound forecast' in a white, sans-serif font.

2 Oregon inbound forecast

Total international visitor spending

Visitor spending: Total international

Index (2019=100)

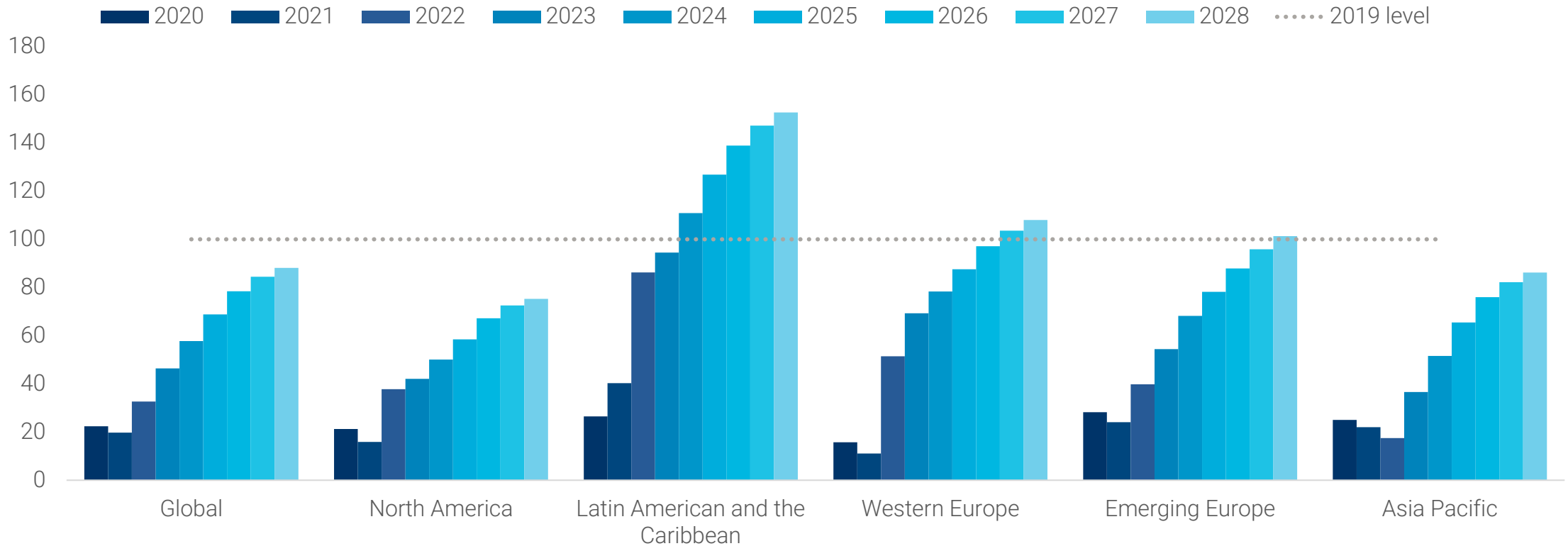


Note: Comparable Set is defined as Oregon, Colorado, Idaho, Nevada, Washington;
Spending is nominal;
2023 is preliminary actuals.
Source: Tourism Economics

Oregon: Spending by origin region (real)

Visitor spending by regions

Index (2019=100), Oregon, 2024 to 2028 are forecast values, 2022 dollars



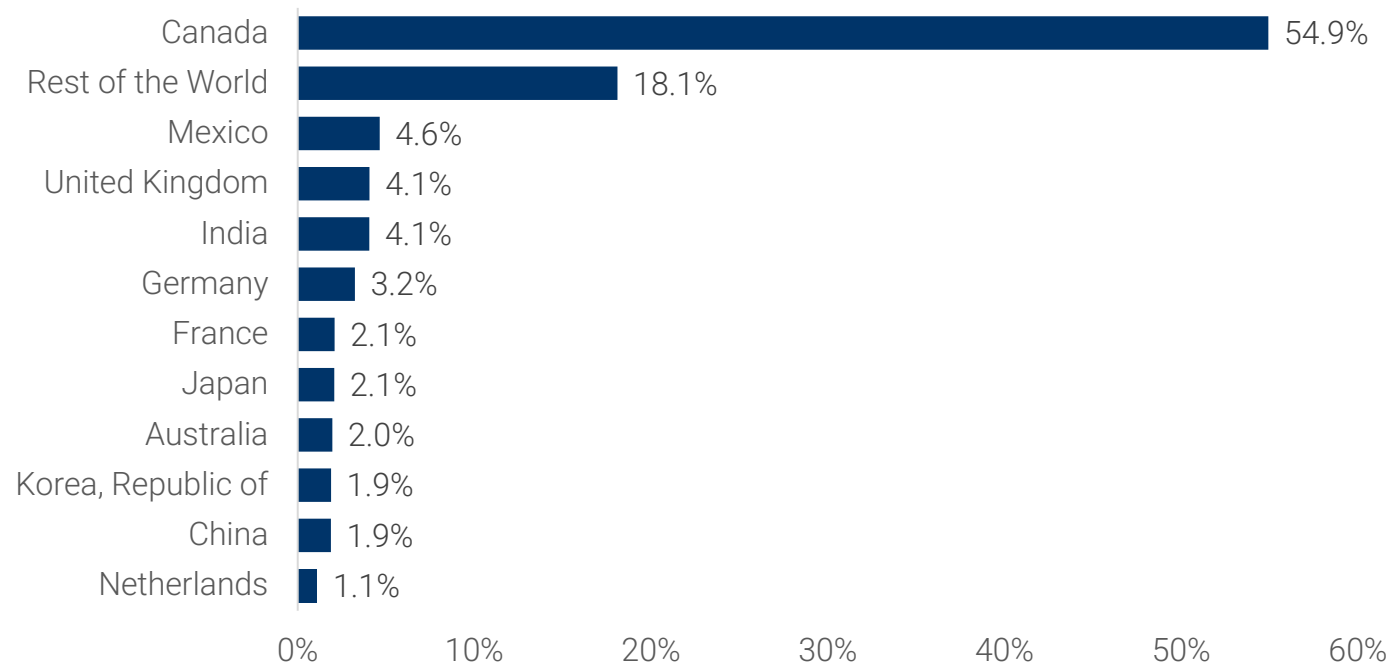
Note: Spending is in real dollars ;
 Emerging Europe includes countries such as Russia, Turkey, Poland, Hungary;
 2023 is preliminary actuals.
 Source: Tourism Economics

Canada, Mexico, the UK and India are particularly important origin markets

Canada accounted for more than half of international visits in 2023, followed by Mexico. United Kingdom and India were the two most important overseas markets.

Share of visits by origin, 2023

Oregon



Note: Rest of the world refers to total international excluding the listed countries ;
2023 is preliminary actuals.

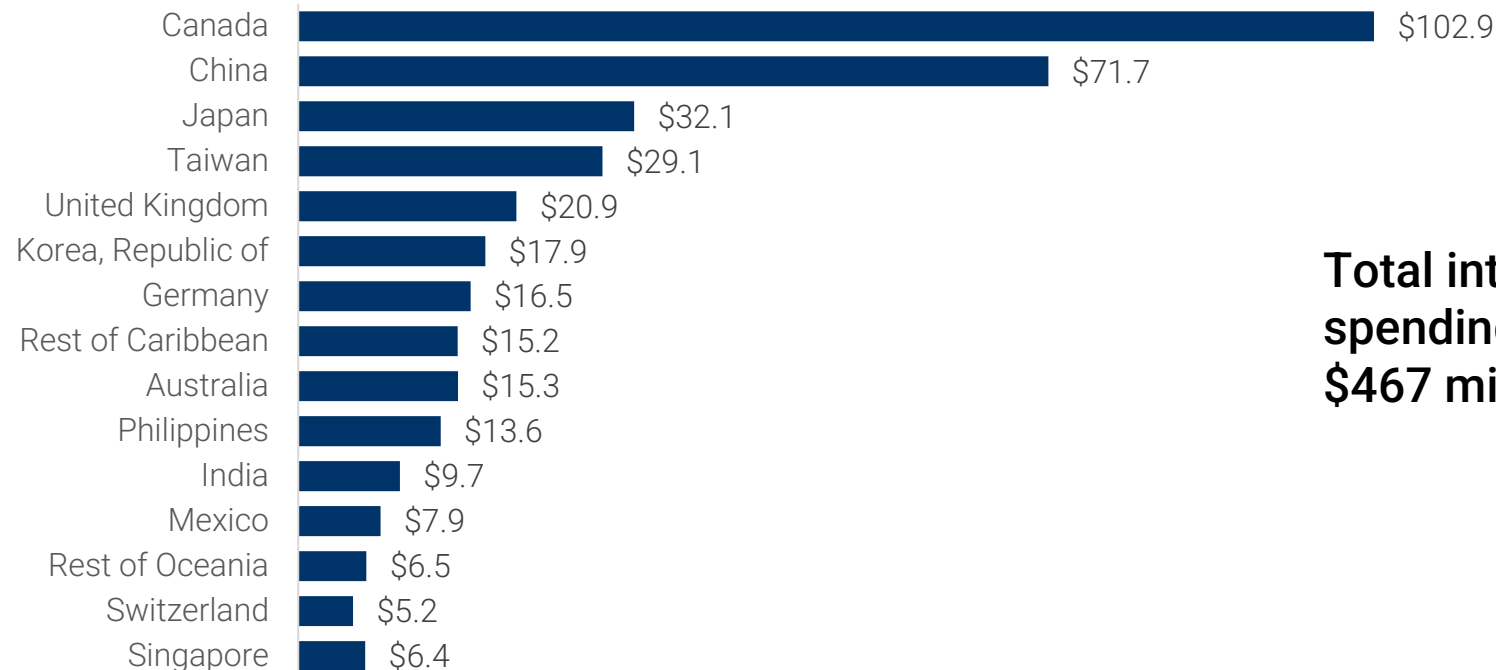
Source: Tourism Economics

Canada, Asia Pacific, and Western Europe offer long-term growth potential

Canada, Asia Pacific, and Western Europe will grow significantly by 2030. For example, visitors from Canada are forecasted to spend \$102.9 million more in 2030 than in 2024.

Forecast change in spending in Oregon 2030 relative to 2024

\$ millions, in 2022 dollars

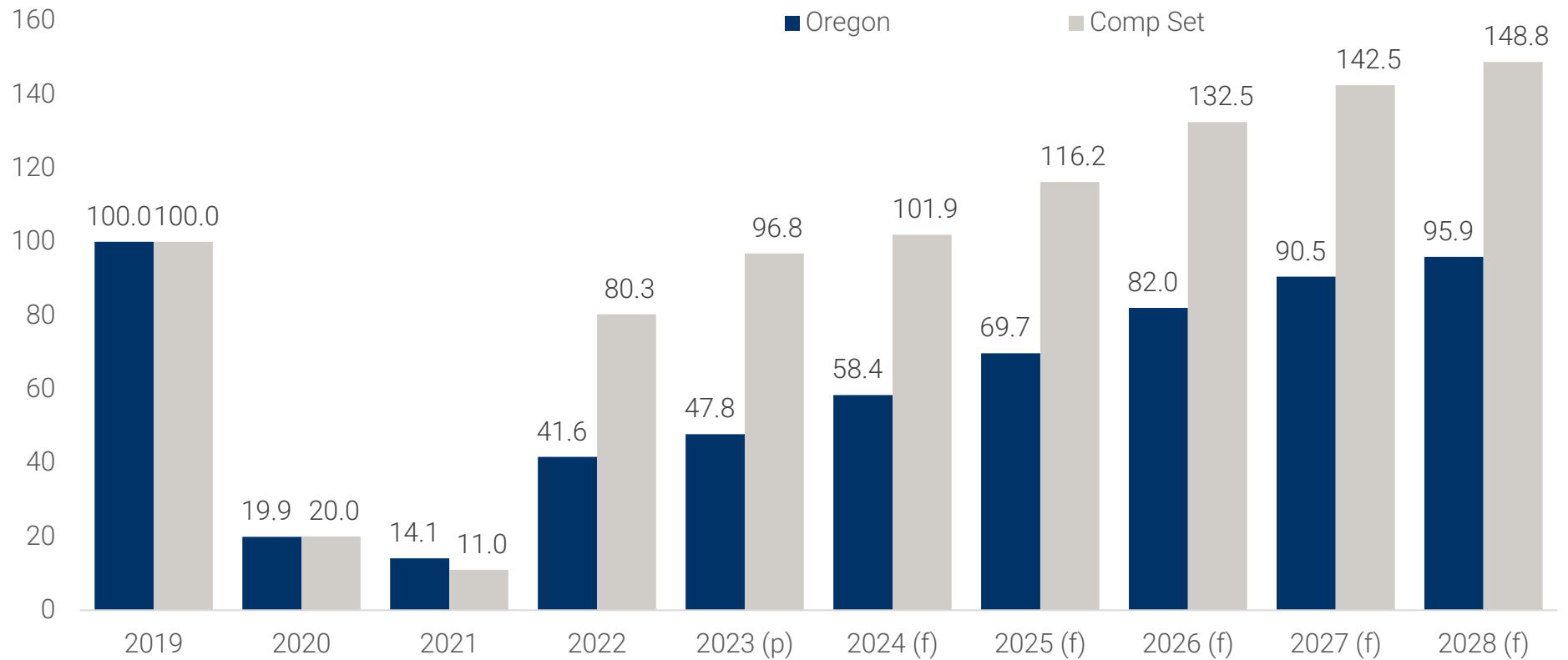


**Total international visitor
spending growth:
\$467 million (2022 dollars)**

Canada visitor spending

Visitor spending: Canada

Index (2019=100)

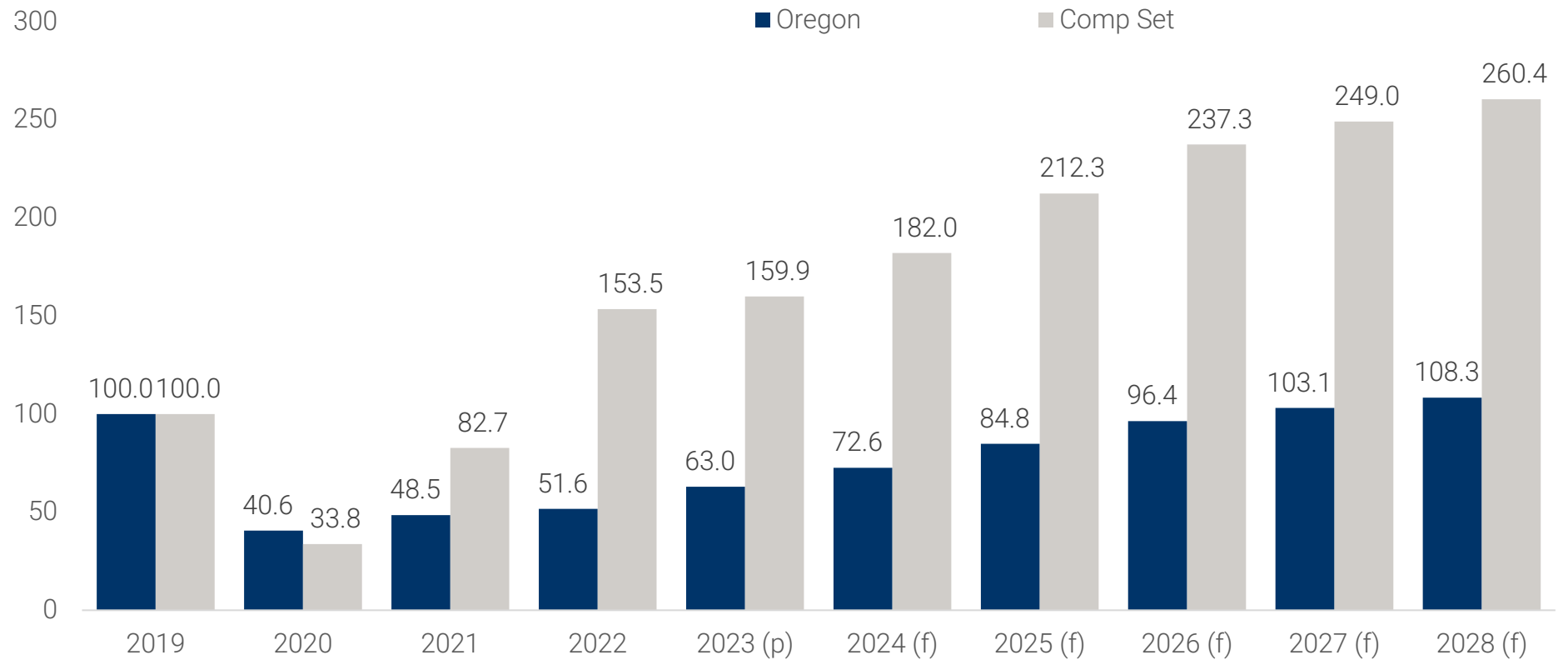


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Source: Tourism Economics

Mexico visitor spending

Visitor spending: Mexico

Index (2019=100)

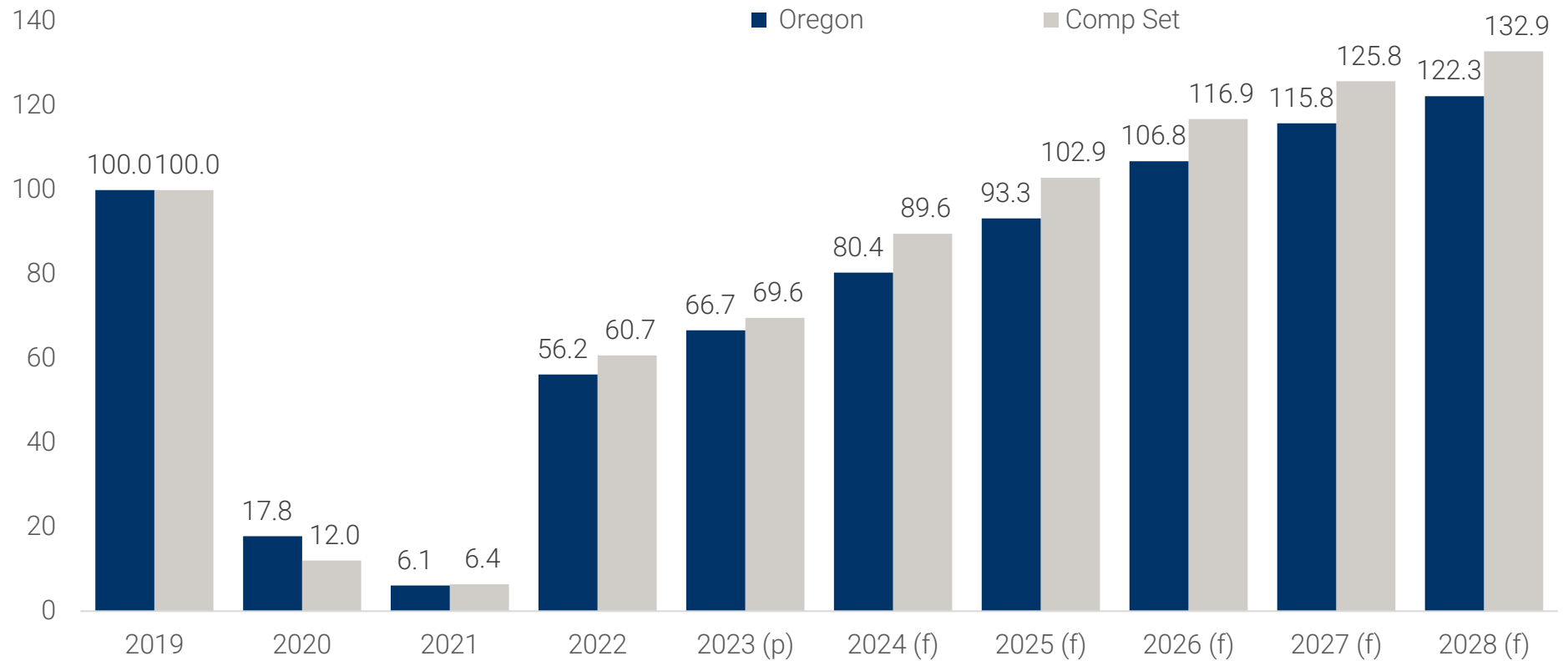


Note: Comparable Set is defined as Oregon, Colorado, Idaho, Nevada, Washington;
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Source: Tourism Economics

United Kingdom visitor spending

Visitor spending: United Kingdom

Index (2019=100)

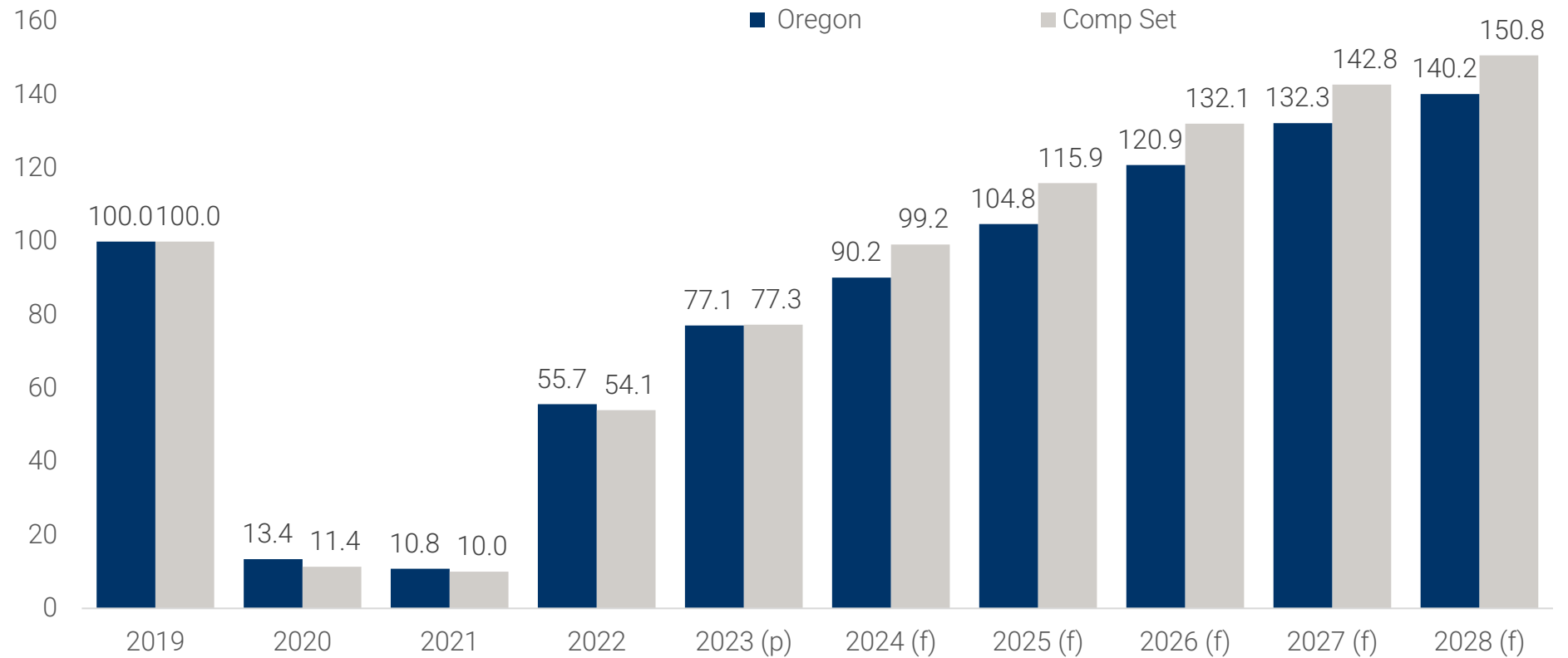


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Spending is nominal ;
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Source: Tourism Economics

Germany visitor spending

Visitor spending: Germany

Index (2019=100)

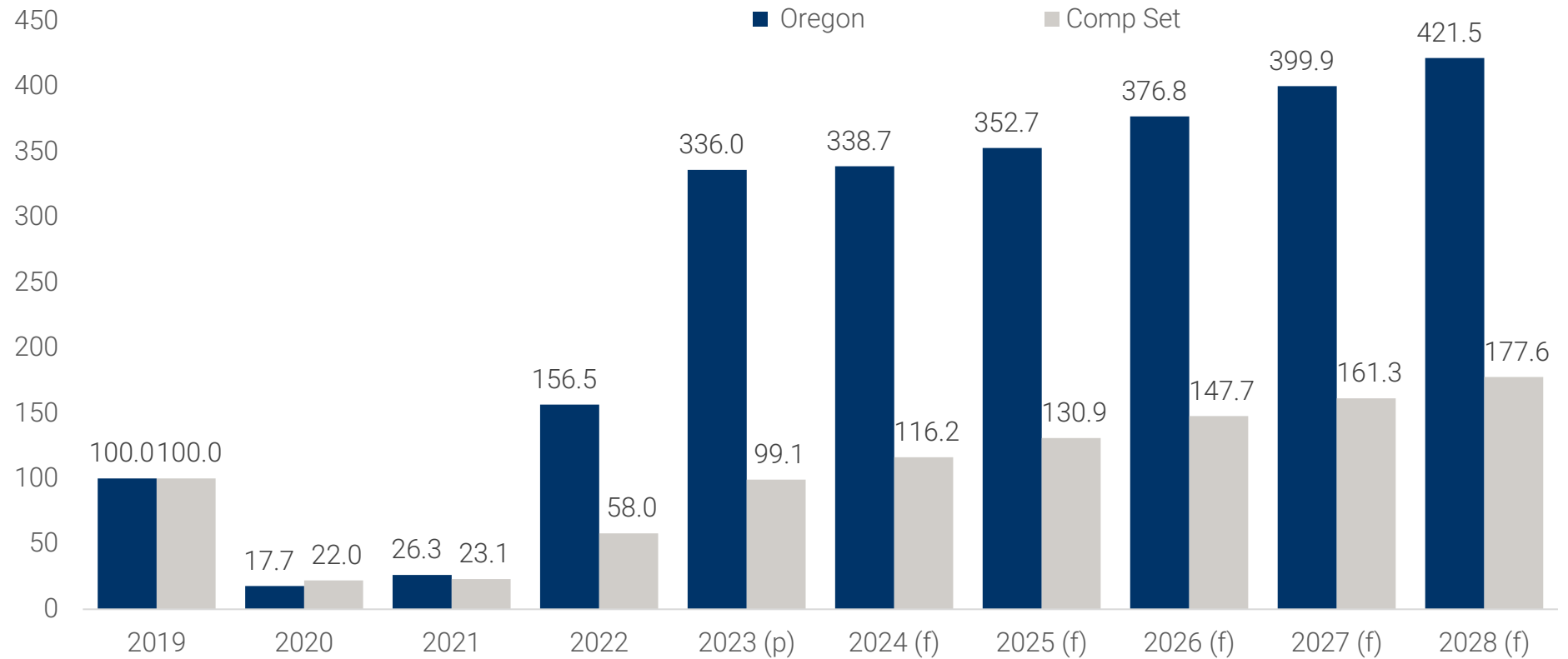


Note: Comparable Set is defined as Oregon, Colorado, Idaho, Nevada, Washington;
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2023 is preliminary actuals.
Source: Tourism Economics

India visitor spending

Visitor spending: India

Index (2019=100)



Note: Comparable Set is defined as Oregon, Colorado, Idaho, Nevada, Washington;
Spending is nominal ;
2023 is preliminary actuals.
Source: Tourism Economics

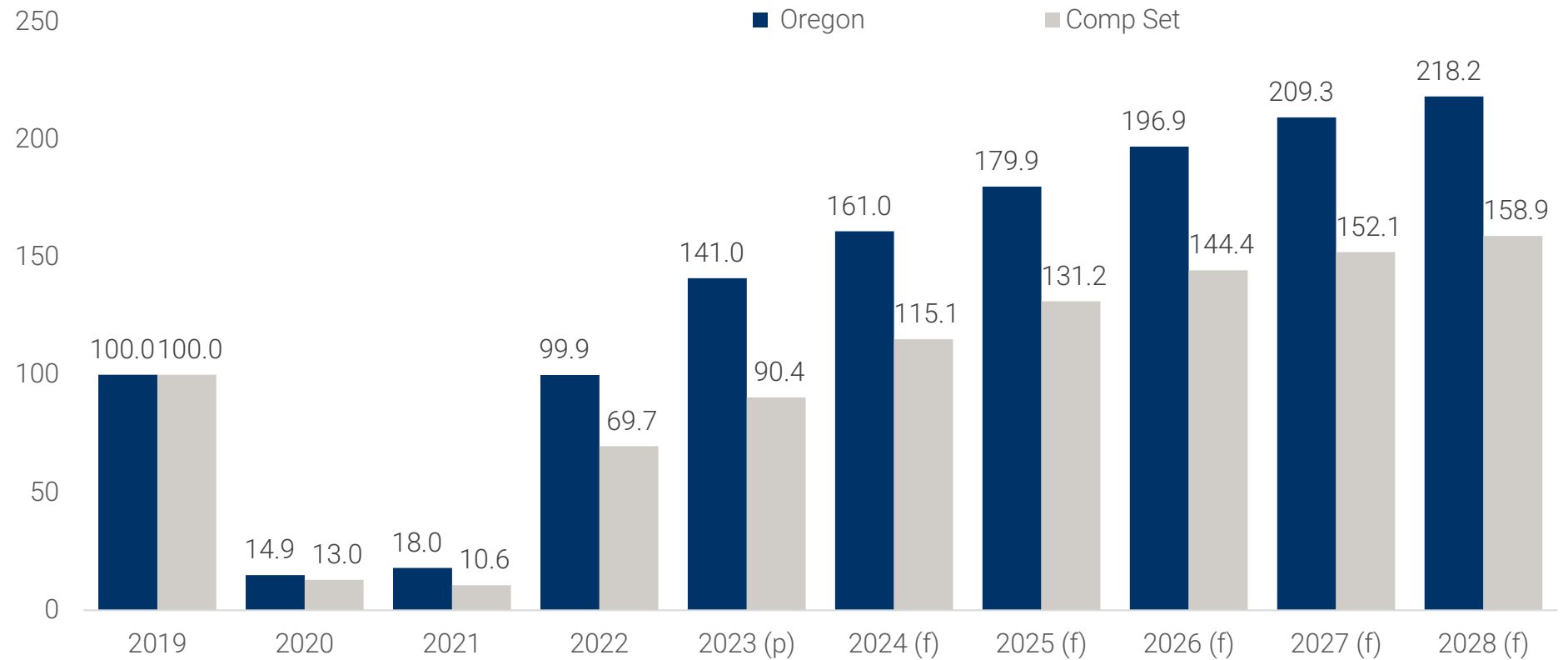
A scenic view of a river flowing through a dense forest. The river is the central focus, winding through the landscape. The surrounding area is filled with tall, green trees, creating a lush and natural environment. The sky is visible in the background, showing some light clouds. Overlaid on the image is a large white number '3' and the word 'Appendix' in a clean, sans-serif font.

3 Appendix

France visitor spending

Visitor spending: France

Index (2019=100)

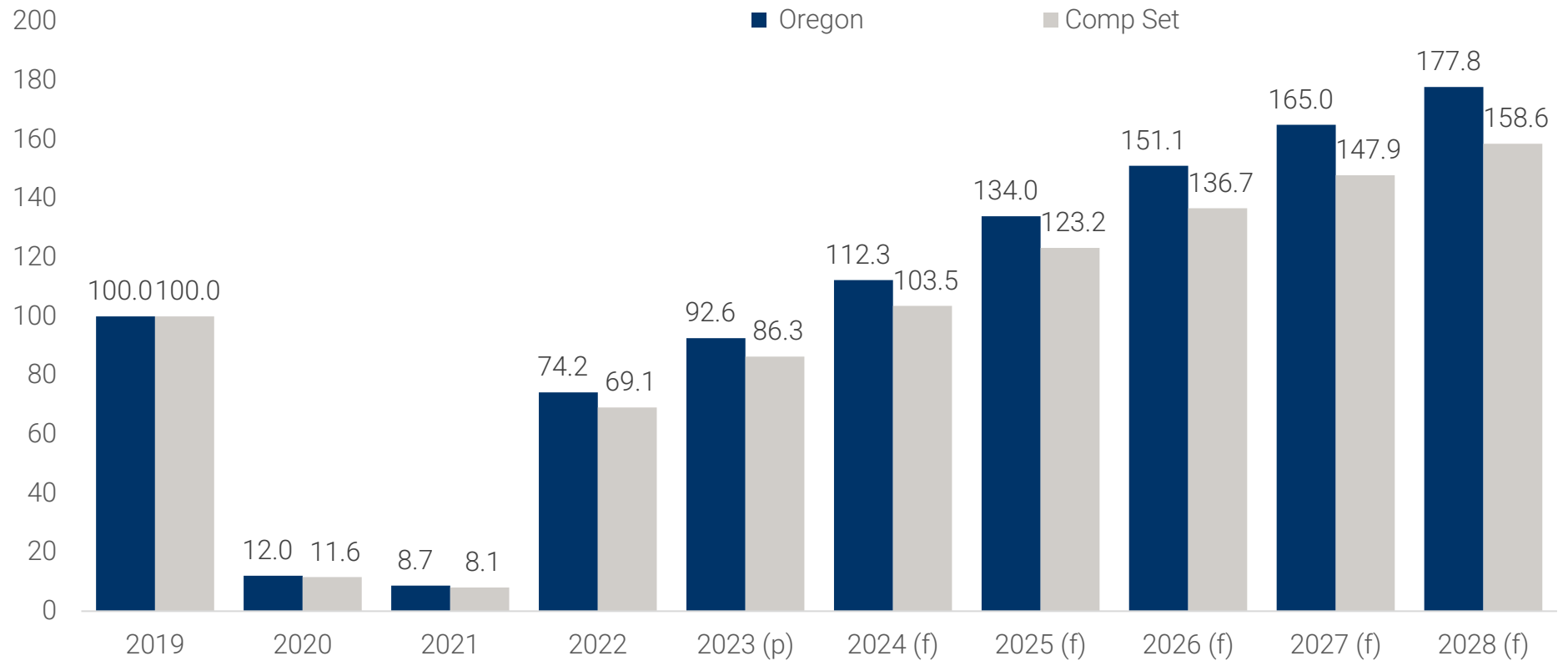


Note: Comparable Set is defined as Oregon, Colorado, Idaho, Nevada, Washington;
Spending is nominal ;
2023 is preliminary actuals.
Source: Tourism Economics

Netherlands visitor spending

Visitor spending: Netherlands

Index (2019=100)

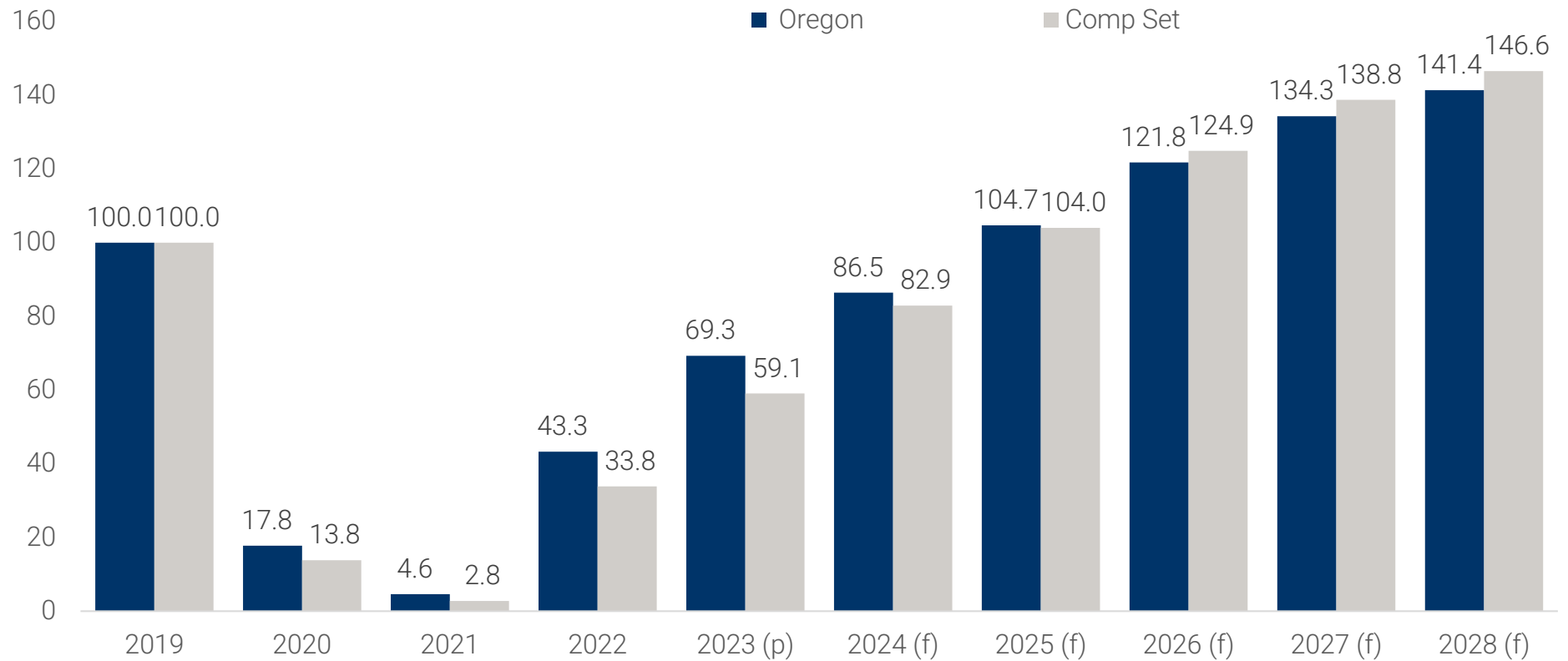


Note: Comparable Set is defined as Oregon, Colorado, Idaho, Nevada, Washington;
Spending is nominal ;
2023 is preliminary actuals.
Source: Tourism Economics

Australia visitor spending

Visitor spending: Australia

Index (2019=100)

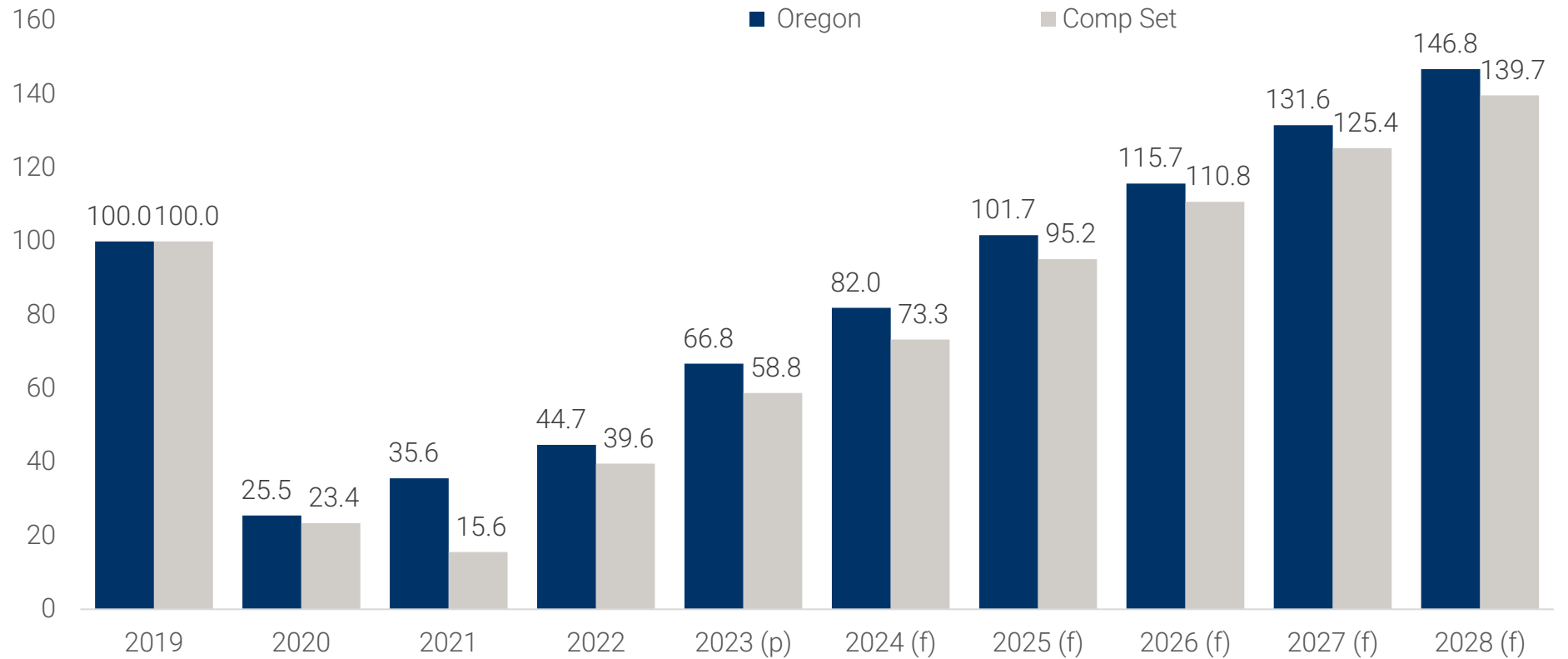


Note: Comparable Set is defined as Oregon, Colorado, Idaho, Nevada, Washington;
Spending is nominal ;
2023 is preliminary actuals.
Source: Tourism Economics

South Korea visitor spending

Visitor spending: South Korea

Index (2019=100)

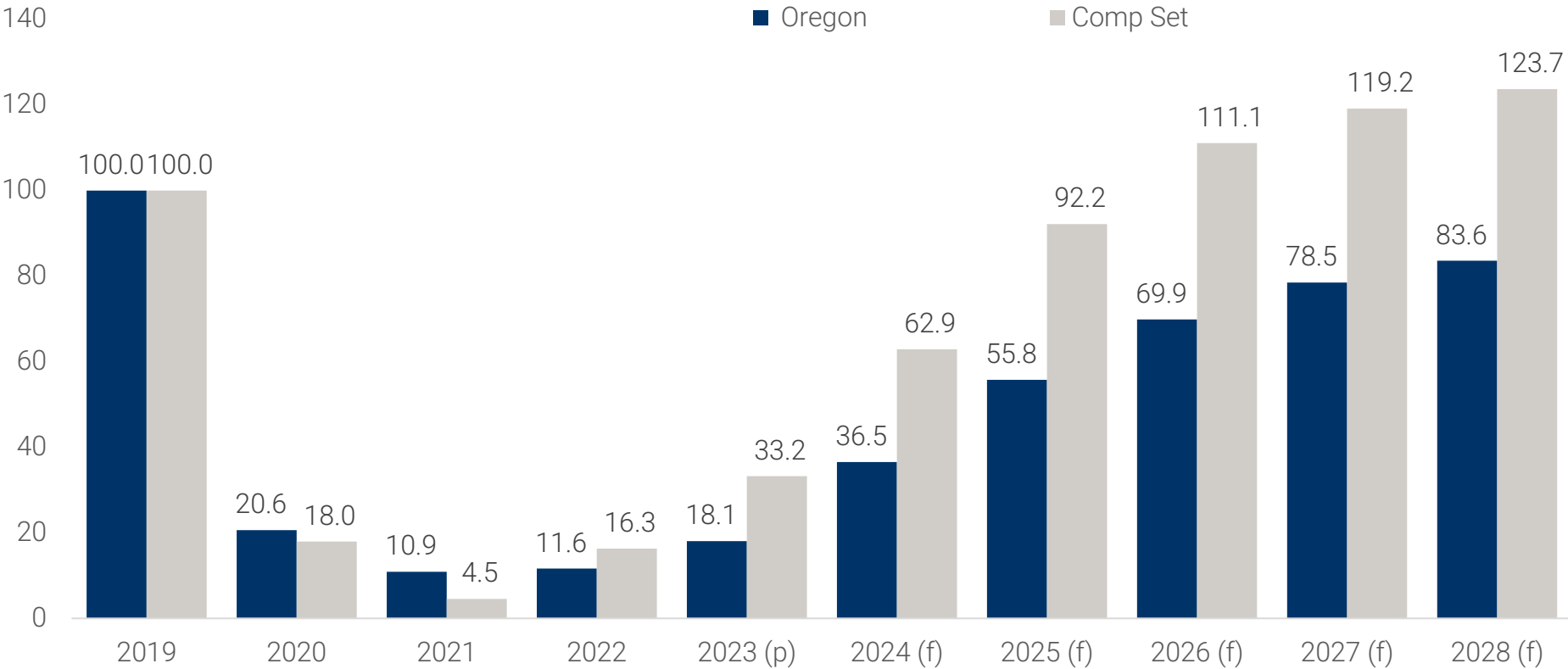


Note: Comparable Set is defined as Oregon, Colorado, Idaho, Nevada, Washington;
Spending is nominal ;
2023 is preliminary actuals.
Source: Tourism Economics

Japan visitor spending

Visitor spending: Japan

Index (2019=100)

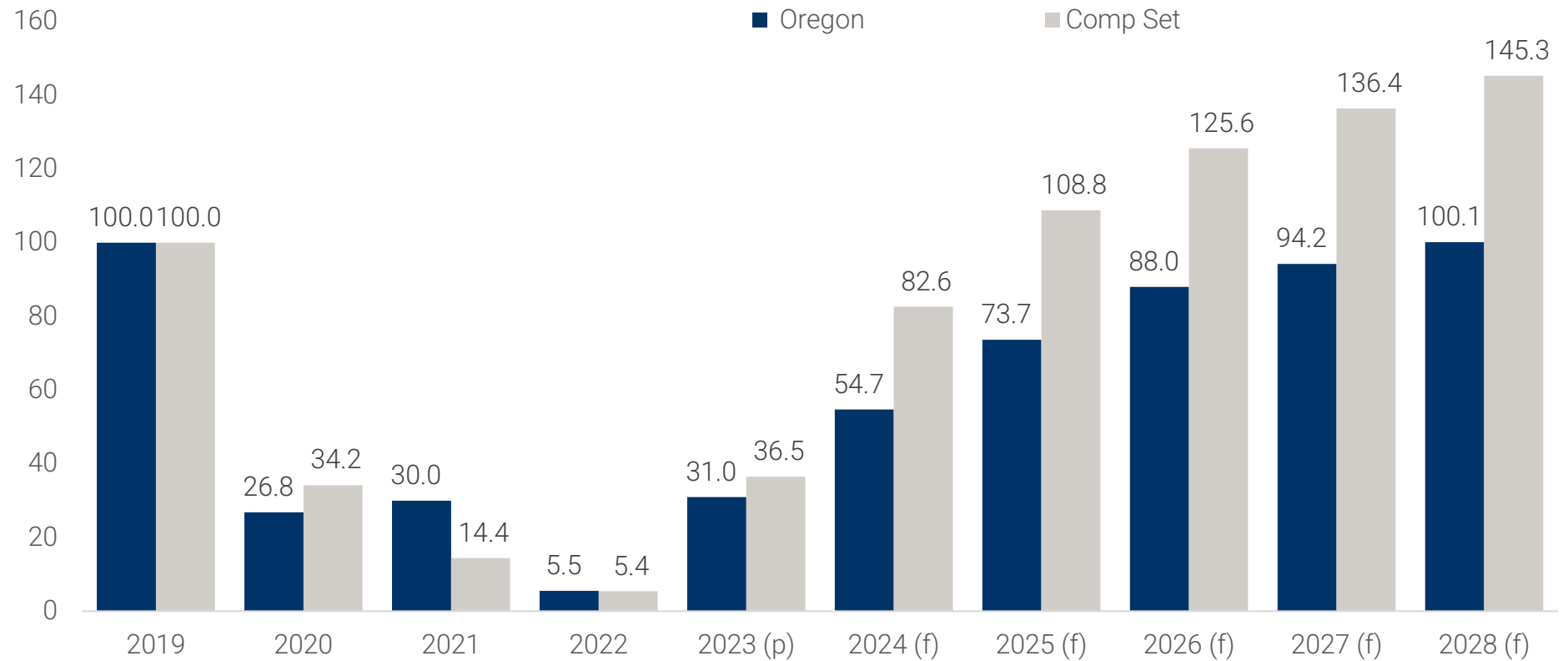


Note: Comparable Set is defined as Oregon, Colorado, Idaho, Nevada, Washington;
Spending is nominal ;
2023 is preliminary actuals.
Source: Tourism Economics

China visitor spending

Visitor spending: China

Index (2019=100)



Note: Comparable Set is defined as Oregon, Colorado, Idaho, Nevada, Washington;
Spending is nominal ;
2023 is preliminary actuals.
Source: Tourism Economics