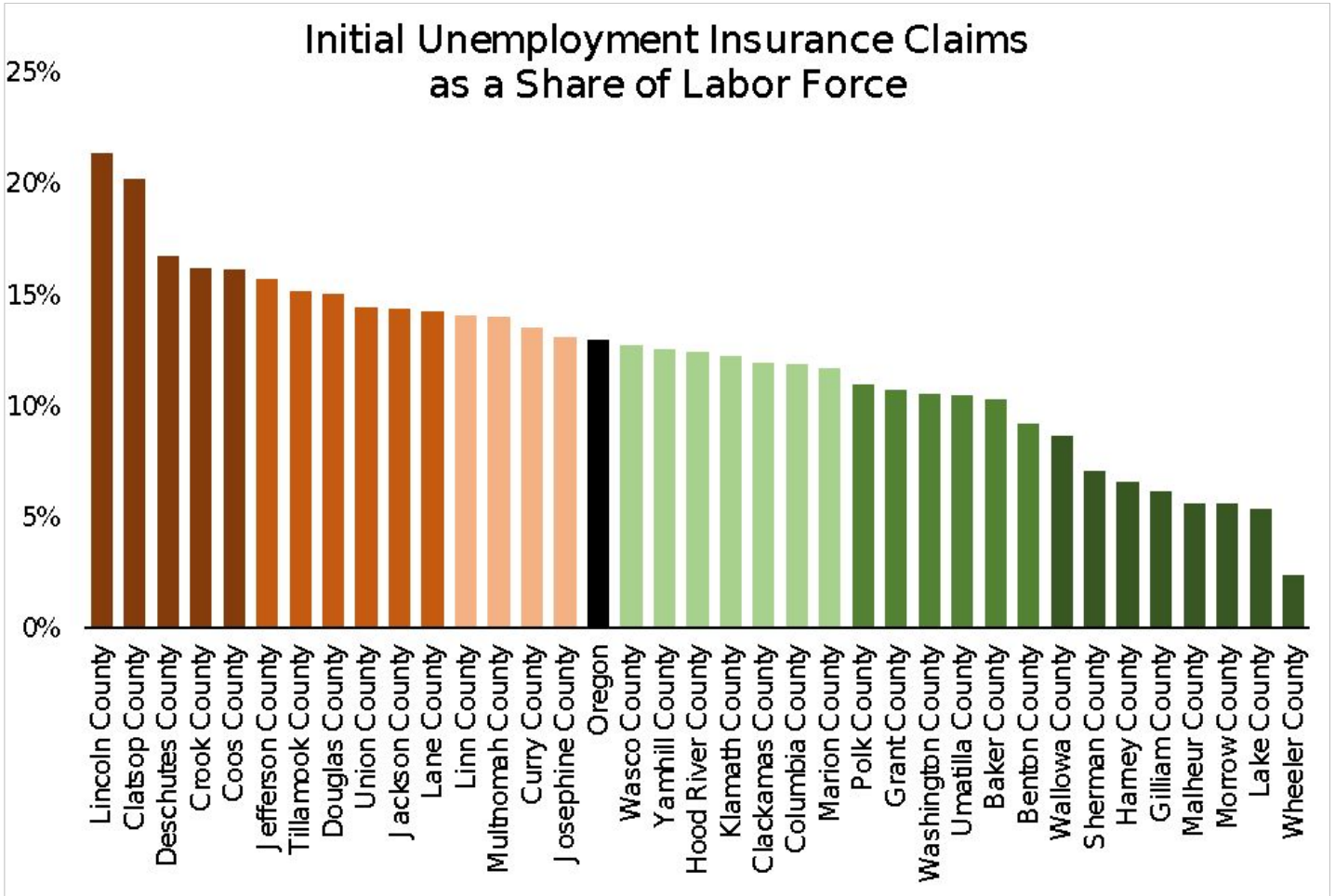
VISIT BEND

Business + Marketing Plan Presentation | FY 2021

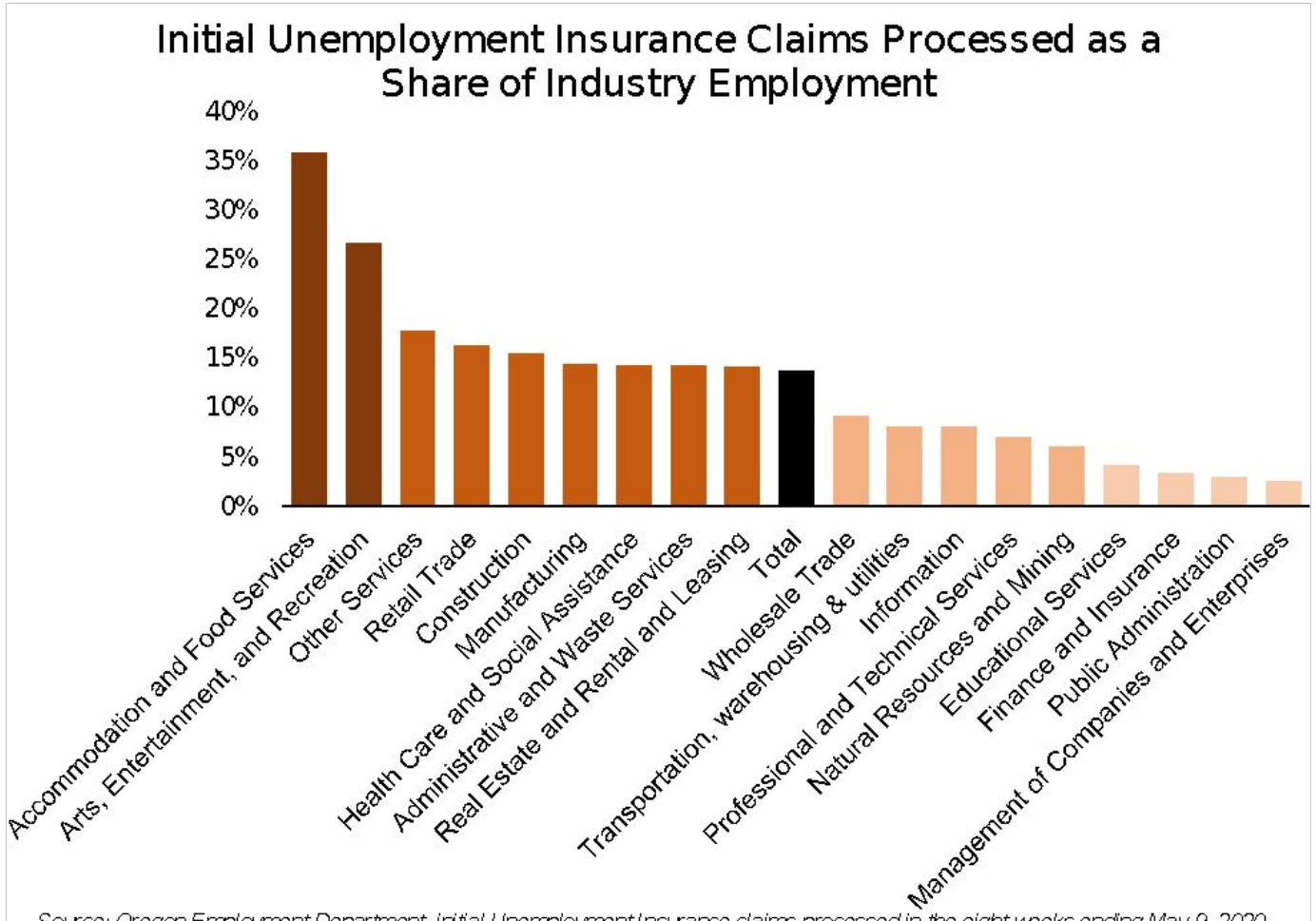
VISIT BEND

Industry Briefing – Workforce + Employment



Source: Oregon Employment Department, initial Unemployment Insurance claims processed in the eight weeks ending May 9, 2020.

Industry Briefing – Workforce + Employment



Source: Oregon Employment Department, initial Unemployment Insurance claims processed in the eight weeks ending May 9, 2020.

Industry Briefing – Workforce + Employment

Deschutes County Unemployment Insurance Claims Processed

Source: Oregon Employment Department

	Claims Processed 8 Weeks Since COVID	December 2019 Employment	COVID Claims as a Share of Dec EMP	Share of Total COVID Unemployed	Share of Weekly Unemployment Insurance Claims							
					3/21/2020	3/28/2020	4/4/2020	4/11/2020	4/18/2020	4/25/2020	5/2/2020	5/9/2020
Accommodation and Food Services	4,127	10,798	38.2%	26.2%	44.2%	29.7%	24.9%	24.2%	25.0%	19.4%	18.0%	18.1%
Health Care and Social Assistance	2,485	13,936	17.8%	15.6%	16.0%	16.4%	15.3%	16.3%	15.8%	14.9%	13.4%	13.3%
Retail Trade	2,022	11,867	17.0%	12.5%	4.7%	9.1%	14.2%	13.3%	13.9%	15.6%	16.5%	12.8%
Manufacturing	1,572	5,675	27.7%	9.8%	7.1%	12.1%	8.1%	8.3%	10.6%	12.8%	9.9%	9.3%
Construction	1,314	7,418	17.7%	8.0%	8.3%	7.6%	10.2%	8.3%	6.5%	6.4%	7.1%	9.5%
Arts, Entertainment, and Recreation	805	3,277	24.6%	5.0%	3.9%	4.8%	5.3%	4.1%	5.8%	5.2%	5.6%	5.5%
Administrative and Waste Services	801	4,684	17.1%	4.9%	3.5%	4.6%	4.7%	4.5%	5.3%	5.6%	6.7%	6.0%
Other Services	723	3,575	20.2%	4.4%	3.5%	4.1%	4.4%	4.7%	4.0%	5.0%	5.2%	5.5%
Professional and Technical Services	445	4,506	9.9%	2.6%	1.6%	2.0%	2.6%	3.0%	2.4%	3.1%	3.8%	4.5%
Wholesale Trade	373	2,239	16.7%	2.3%	0.6%	1.6%	1.6%	3.7%	2.6%	2.7%	2.9%	3.0%
Real Estate and Rental and Leasing	319	1,347	23.7%	1.9%	0.8%	1.9%	2.2%	2.1%	1.5%	2.2%	1.8%	3.5%
Educational Services	292	4,994	5.8%	1.8%	2.3%	1.4%	1.6%	1.9%	2.1%	1.8%	1.9%	2.2%
Information	215	1,954	11.0%	1.2%	0.9%	1.4%	1.4%	1.3%	0.8%	0.8%	1.8%	2.4%
Public Administration	194	3,092	6.3%	1.2%	1.1%	1.4%	1.3%	1.1%	1.0%	1.6%	1.2%	0.9%
Transportation and Warehousing	208	2,405	8.6%	1.2%	0.5%	0.7%	0.9%	1.4%	1.0%	1.6%	2.6%	2.6%
Finance and Insurance	85	2,110	4.0%	0.5%	0.4%	0.2%	0.5%	0.6%	0.9%	0.7%	0.6%	0.3%
Agriculture, Forestry, Fishing and Hunting	84	1,018	8.3%	0.5%	0.4%	0.7%	0.4%	0.6%	0.3%	0.4%	0.9%	0.6%
Management of Companies and Enterprises	17	969	1.8%	0.1%	C	C	C	0.3%	0.3%	C	C	C
Utilities	6	453	1.3%	0.0%	C	C	C	C	C	C	C	C
Mining	C	63	NA	C	C	C	C	C	C	C	C	C
Total	16,118	86,460	18.6%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Tourism Sector Totals	6,954	25,937	79.8%	43.7%	52.8%	43.7%	44.4%	41.6%	44.7%	40.2%	40.1%	36.3%

Industry Briefing – Industry Roundtables

Lodging

Restaurants/Breweries

Tour Operators + Outfitters

Retail

TRT Data + Projections

	FY14/15	CHANGE	FY15/16	CHANGE	FY16/17	CHANGE	FY17/18	CHANGE	FY18/19	CHANGE	FY19/20	CHANGE
JUL	$881,867	50.4%	$1,167,521	32.4%	$1,253,078	7.3%	$1,415,547	13.0%	$1,392,621	-1.6%	$1,577,419	13.3%
AUG	$870,733	42.6%	$1,021,591	17.3%	$1,109,525	8.6%	$1,347,492	21.4%	$1,343,926	-0.3%	$1,458,091	8.5%
SEP	$565,927	22.4%	$739,451	30.7%	$839,649	13.6%	$820,801	-2.2%	$945,580	15.2%	$1,021,424	8.0%
OCT	$440,768	27.6%	$530,277	20.3%	$664,833	25.4%	$650,738	-2.1%	$734,036	12.8%	$795,824	8.4%
NOV	$295,095	36.8%	$357,600	21.2%	$458,649	28.3%	$426,303	-7.1%	$495,457	16.2%	$539,082	8.8%
DEC	$380,893	31.8%	$434,108	14.0%	$541,672	24.8%	$506,919	-6.4%	$567,940	12.0%	$592,304	4.3%
JAN	$328,996	43.9%	$399,620	21.5%	$467,385	17.0%	$475,959	1.8%	$554,007	16.4%	$595,797	7.5%
FEB	$377,576	43.7%	$428,240	13.4%	$475,558	11.0%	$499,784	5.1%	$533,904	6.8%	$654,810	22.6%
MAR	$492,377	38.1%	$542,242	10.1%	$686,690	26.6%	$673,381	-1.9%	$741,513	10.1%	$304,024	-59.0%
APR	$474,418	43.8%	$571,271	20.4%	$635,713	11.3%	$690,587	8.6%	$737,773	6.8%	$103,288	-86.0%
MAY	$587,528	36.0%	$614,788	4.6%	$766,845	24.7%	$803,357	4.8%	$915,959	14.0%	$228,990	-75.0%
JUN	$794,235	32.1%	$887,415	11.7%	$1,021,403	15.1%	$1,081,683	5.9%	$1,210,933	11.9%	$484,373	-60.0%
FY END	$6,490,413	37.5%	$7,694,125	18.5%	$8,920,998	15.9%	$9,392,551	5.3%	$10,173,649	8.3%	$8,355,426*	-17.9%

*FY20 projected TRT is now off 21.2% from original projections of $10.6 million

= Record Month = Projection

Industry Briefing – TRT Data

Hotel, Motel, Resort, OTA															
		July	August	September	October	November	December	January	February	March	April	May	June	Total Year	
2018	2017/18	$1,141,693	$1,086,135	$659,175	$531,967	$330,526	$379,113	$323,792	$355,163	$507,184	$538,880	$630,252	$816,414	$7,300,294	
2019	2018/19	$1,128,099	$1,102,577	$785,476	$614,296	$404,335	$427,165	$376,484	$369,784	$531,575	$549,580	$700,162	$993,238	$7,982,771	
2020	2019/20	$1,452,618	$1,122,377	$788,167	$667,801	$386,579	$421,362	$395,638	$440,901	$269,062				$5,944,505	
	% Change	29%	2%	0%	9%	-4%	-1%	5%	19%	-49%					3.57%

Vacation Rental															
		July	August	September	October	November	December	January	February	March	April	May	June	Total Year	
2018	2017/18	$165,402	$155,212	$86,523	$47,787	$34,853	$71,772	$47,425	$47,976	$53,971	$40,435	$56,558	$95,865	$903,779	
2019	2018/19	$137,911	$115,559	$59,286	$30,647	$22,985	$59,555	$43,074	$45,095	$55,037	$48,907	$62,202	$100,360	$780,618	
2020	2019/20	$155,736	$126,309	$84,030	$60,984	$41,748	$65,923	$53,187	$50,369	$31,449				$669,735	
	% Change	13%	9%	42%	99%	82%	11%	23%	12%	-43%					17.67%

B&B, Boarding House															
		July	August	September	October	November	December	January	February	March	April	May	June	Total Year	
2018	2017/18	$10,870	$10,686	$6,730	$4,719	$1,871	$2,692	$1,869	$2,303	$3,526	$3,648	$5,959	$8,167	$63,040	
2019	2018/19	$10,554	$10,169	$8,058	$4,619	$2,147	$2,403	$2,250	$1,951	$2,437	$3,331	$4,452	$6,868	$59,239	
2020	2019/20	$9,665	$9,408	$8,050	$4,791	$2,183	$2,073	$921	$1,803	$1,888				$40,782	
	% Change	-8%	-7%	0%	4%	2%	-14%	-59%	-8%	-23%					-8.54%

RV Park															
		July	August	September	October	November	December	January	February	March	April	May	June	Total Year	
2018	2017/18	$22,678	$22,198	$14,111	$7,255	$1,677	$990	$1,098	$1,148	$2,580	$4,708	$11,636	$21,318	$111,397	
2019	2018/19	$25,182	$26,687	$17,337	$8,608	$2,284	$1,283	$1,448	$1,159	$2,780	$5,930	$14,044	$22,490	$129,232	
2020	2019/20	$30,694	$27,552	$36,946	$12,669	$3,223	$1,461	$1,975	$1,456	$2,879				$118,855	
	% Change	22%	3%	113%	47%	41%	14%	36%	26%	4%					36.98%

Airbnb															
		July	August	September	October	November	December	January	February	March	April	May	June	Total Year	
2018	2017/18	$74,905	$73,261	$54,262	$59,010	$57,376	$52,352	$101,775	$93,194	$106,150	$102,916	$89,195	$99,977	$964,373	
2019	2018/19	$90,876	$88,934	$75,423	$75,867	$63,706	$77,534	$130,751	$115,915	$149,684	$130,025	$135,098	$122,689	$1,256,502	
2020	2019/20	$120,607	$116,171	$106,547	$105,213	$92,575	$89,697	$168,488	$155,660	$0				$954,958	
	% Change	33%	31%	41%	39%	45%	16%	29%	34%	-100%					9.93%

Industry Briefing – Hotel Occupancy Data

Hotel Industry Occupancy Report (STR)

Occupancy (%)		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	FY total
2015	2014/15	86.5%	87.1%	72.9%	63.7%	46.6%	50.8%	48.9%	56.9%	64.2%	67.5%	71.5%	82.0%	66.5%
2016	2015/16	90.4%	84.8%	80.3%	65.7%	51.2%	52.1%	53.6%	59.6%	66.6%	75.3%	73.3%	85.2%	69.3%
2017	2016/17	88.8%	86.2%	84.6%	74.1%	58.4%	56.3%	52.3%	57.1%	66.8%	66.3%	72.6%	82.2%	70.9%
2018	2017/18	88.2%	85.3%	78.2%	69.3%	49.9%	52.3%	48.5%	54.6%	68.9%	70.8%	72.4%	83.2%	68.6%
2019	2018/19	83.1%	83.7%	79.6%	69.2%	52.4%	51.0%	48.4%	49.9%	62.6%	67.2%	72.5%	80.9%	66.7%
2020	2019/20	84.9%	84.5%	78.8%	67.4%	51.2%	48.4%	46.0%	55.3%	36.5%	17.6%			57.2%
		2.2%	1.0%	-1.0%	-2.6%	-2.3%	-5.1%	-5.0%	10.8%	-41.7%	-73.8%			-14.2%

ADR ($)		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	FY total
2015	2014/15	$137.93	$139.80	$115.72	$107.07	$98.23	$99.56	$99.17	$102.78	$107.96	$105.86	$115.13	$130.19	$115.96
2016	2015/16	$151.10	$147.86	$123.41	$111.16	$97.57	$100.19	$99.44	$101.90	$105.15	$110.17	$119.19	$138.92	$120.50
2017	2016/17	$163.54	$155.43	$128.30	$114.92	$102.54	$103.39	$99.38	$103.70	$110.77	$108.96	$123.50	$146.29	$125.81
2018	2017/18	$170.15	$175.86	$129.24	$113.94	$101.84	$101.18	$96.47	$101.88	$110.34	$115.16	$125.42	$151.64	$129.40
2019	2018/19	$171.93	$167.59	$130.09	$115.28	$100.65	$99.66	$100.16	$104.50	$111.28	$112.96	$126.67	$150.08	$128.52
2020	2019/20	$174.60	$167.80	$130.79	$117.55	$103.17	$102.88	$99.21	$104.84	$100.85	$80.29			$128.18
		1.6%	0.1%	0.5%	2.0%	2.5%	3.2%	-0.9%	0.3%	-9.4%	-28.9%			-0.3%

RevPAR ($)		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	FY total
2015	2014/15	$119.28	$121.75	$84.34	$68.24	$45.80	$50.62	$48.52	$58.48	$69.32	$71.49	$82.30	$106.75	$77.11
2016	2015/16	$136.58	$125.41	$99.13	$74.99	$49.98	$52.18	$53.34	$60.78	$70.08	$82.99	$87.40	$112.64	$83.46
2017	2016/17	$145.27	$133.95	$108.61	$82.51	$59.89	$58.23	$51.98	$59.26	$74.02	$72.22	$89.66	$120.27	$89.20
2018	2017/18	$150.15	$150.06	$101.08	$78.96	$50.81	$52.91	$46.80	$55.60	$76.05	$81.49	$90.75	$126.22	$88.78
2019	2018/19	$142.94	$140.30	$103.58	$79.75	$52.77	$50.86	$48.52	$52.15	$69.61	$75.89	$91.84	$121.37	$85.68
2020	2019/20	$148.19	$141.82	$130.09	$79.25	$52.77	$49.83	$45.68	$57.93	$36.77	$14.14			$73.33
		3.7%	1.1%	25.6%	-0.6%	0.0%	-2.0%	-5.9%	11.1%	-47.2%	-81.4%			-14.4%

Supply		July	August	September	October	November	December	January	February	March	April	May	June	Total Year
2015	2014/15	87,575	87,575	88,170	91,109	88,170	91,109	91,109	82,292	91,109	88,170	91,109	88,170	1,065,667
2016	2015/16	91,109	91,109	88,170	91,109	88,170	93,062	93,062	84,056	93,062	90,060	93,062	90,060	1,086,091
2017	2016/17	85,095	85,870	83,070	86,397	83,610	86,397	86,397	76,860	86,397	86,790	86,397	86,790	1,020,070
2018	2017/18	89,683	89,683	86,790	89,683	86,820	89,745	89,745	81,060	89,745	86,850	89,745	90,420	1,059,969
2019	2018/19	93,434	93,434	90,420	93,434	93,570	96,689	96,658	87,584	96,658	93,540	96,658	93,540	1,125,619
2020	2019/20	96,658	96,658	93,540	96,658	93,540	96,658	96,658	87,584	96,658	93,540			948,152
		3.5%	3.5%	3.5%	3.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%			-15.8%

Demand		July	August	September	October	November	December	January	February	March	April	May	June	Total Year
2015	2014/15	75,730	76,265	64,264	58,068	41,111	46,325	44,573	46,824	58,501	59,547	65,131	72,291	708,630
2016	2015/16	82,355	77,279	70,828	59,877	45,168	48,463	49,912	50,134	62,022	67,841	68,237	70,142	752,258
2017	2016/17	74,885	74,004	70,342	63,999	48,700	48,624	46,378	44,596	57,732	57,526	65,107	71,357	723,250
2018	2017/18	79,141	76,525	67,883	62,152	43,319	46,933	43,536	44,239	61,859	61,460	64,932	75,262	727,241
2019	2018/19	77,680	78,221	71,994	64,638	49,060	49,341	46,828	43,569	60,463	62,840	70,082	75,650	750,366
2020	2019/20	82,039	81,689	73,732	65,164	47,848	46,817	44,650	48,397	35,353	16,682			542,371
		5.6%	4.4%	2.4%	0.8%	-2.5%	-5.1%	-4.7%	11.1%	-41.5%	-73.5%			-27.7%

Revenue ($)		July	August	September	October	November	December	January	February	March	April	May	June	Total Year
2015	2014/15	$10,445,675	$10,661,996	$7,436,502	$6,217,393	$4,038,189	$4,611,935	$4,420,191	$4,812,662	$6,315,786	$6,303,611	$7,498,569	$9,411,753	82,174,262
2016	2015/16	$12,443,859	$11,426,377	$8,740,665	$6,831,969	$4,406,885	$4,855,692	$4,963,474	$5,108,823	$6,521,415	$7,473,980	$8,133,254	$9,744,142	90,650,535
2017	2016/17	$12,361,999	$11,502,123	$9,025,094	$7,359,527	$4,976,569	$5,006,012	$4,991,220	$4,624,774	$6,395,115	$6,268,158	$8,040,747	$10,438,494	90,989,832
2018	2017/18	$13,465,723	$13,457,755	$8,773,145	$7,081,550	$4,411,642	$4,748,810	$4,199,846	$4,507,216	$6,825,273	$7,077,819	$8,143,916	$11,412,716	94,105,411
2019	2018/19	$13,355,705	$13,108,858	$9,365,856	$7,451,215	$4,938,079	$4,917,397	$4,690,069	$4,552,756	$6,728,355	$7,098,516	$8,877,539	$11,353,249	96,437,594
2020	2019/20	$14,324,114	$13,707,708	$9,643,368	$7,660,182	$4,936,404	$4,816,450	$4,429,597	$5,073,956	$3,565,353	$1,366,419			69,523,551
		7.3%	4.6%	3.0%	2.8%	0.0%	-2.1%	-5.6%	11.4%	-47.0%	-80.8%			-27.9%

Industry Briefing – Short Term Rental Occupancy Data

Occupancy (%)

		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	FY total
2015	2014/15				43.0%	35.9%	40.8%	33.1%	37.8%	43.0%	43.7%	41.1%	55.3%	41.5%
2016	2015/16	73.7%	63.9%	43.3%	40.2%	34.1%	43.7%	35.7%	42.7%	48.7%	47.7%	42.5%	60.2%	48.0%
2017	2016/17	72.0%	67.3%	60.4%	50.3%	41.7%	51.3%	41.8%	43.4%	47.0%	42.8%	42.3%	55.2%	51.3%
2018	2017/18	69.0%	62.6%	54.4%	48.4%	41.1%	45.7%	42.7%	46.0%	49.5%	52.1%	53.5%	61.1%	52.2%
2019	2018/19	73.9%	68.6%	61.1%	48.5%	43.3%	48.3%	39.2%	41.6%	47.9%	46.7%	45.6%	57.3%	51.8%
2020	2019/20	63.4%	67.2%	59.9%	50.0%	46.5%	50.6%	62.3%	73.0%	53.8%	54.0%			58.1%
		-14.2%	-2.0%	-2.0%	3.1%	7.4%	4.8%	58.9%	75.5%	12.3%	15.6%			

ADR ($)

		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	FY total
2015	2014/15				$138.04	$138.67	$147.83	$138.64	$137.52	$143.06	$138.49	$152.88	$158.83	$143.77
2016	2015/16	$168.85	$170.54	$162.96	$152.51	$183.93	$206.43	$189.20	$192.16	$196.96	$181.31	$201.41	$211.66	$184.83
2017	2016/17	$220.95	$218.37	$211.63	$184.42	$192.77	$205.02	$205.02	$200.92	$198.71	$202.23	$208.24	$236.59	$207.07
2018	2017/18	$255.61	$270.56	$222.98	$194.72	$211.25	$226.08	$190.96	$191.67	$198.68	$205.55	$259.27	$235.70	$221.92
2019	2018/19	$258.28	$235.93	$211.24	$187.42	$201.79	$222.85	$207.22	$207.38	$204.79	$192.69	$207.68	$222.23	$213.29
2020	2019/20	$244.91	$248.90	$205.98	$203.72	$221.53	$204.30	$186.79	$179.17	$171.72	$173.78			$204.08
		-5.2%	5.5%	-2.5%	8.7%	9.8%	-8.3%	-9.9%	-13.6%	-16.1%	-9.8%			

RevPAR ($)

		Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	FY total
2015	2014/15				$59.33	$49.74	$60.26	$45.84	$52.00	$61.57	$60.51	$62.86	$87.83	$59.99
2016	2015/16	$124.39	$108.97	$70.60	$61.35	$62.74	$90.29	$67.61	$82.01	$95.85	$86.54	$85.66	$127.42	$88.62
2017	2016/17	$159.07	$147.00	$127.88	$92.82	$80.42	$120.07	$85.66	$87.21	$93.30	$86.60	$88.19	$130.50	$108.23
2018	2017/18	$176.46	$169.39	$121.39	$94.18	$86.73	$103.32	$81.62	$88.17	$98.44	$107.11	$138.81	$143.91	$117.46
2019	2018/19	$190.96	$161.63	$129.13	$90.84	$87.30	$107.60	$81.21	$86.32	$98.12	$90.03	$94.63	$127.33	$112.09
2020	2019/20	$155.22	$167.38	$123.31	$101.92	$102.99	$103.47	$116.43	$130.72	$92.41	$93.76			$118.76
		-18.7%	3.6%	-4.5%	12.2%	18.0%	-3.8%	43.4%	51.4%	-5.8%	4.1%			

Supply - Listing Nights

		July	August	September	October	November	December	January	February	March	April	May	June	Total Year
2015	2014/15				2,436	2,523	2,946	2,925	2,357	2,895	2,442	3,057	2,971	24,552
2016	2015/16	3,213	3,637	3,481	3,883	5,127	6,269	6,733	6,378	6,567	6,160	8,128	7,784	67,360
2017	2016/17	8,323	8,426	8,380	7,572	7,857	9,508	9,579	10,729	13,726	12,760	15,642	17,858	130,360
2018	2017/18	21,410	26,114	21,215	17,445	16,760	21,142	16,824	15,700	17,108	17,271	22,003	21,891	234,883
2019	2018/19	26,220	26,993	24,219	21,986	19,687	23,246	25,036	22,863	25,010	26,351	28,482	30,822	300,915
2020	2019/20	32,771	33,713	30,379	27,285	26,530	32,964	30,255	27,140	28,592	18,780			288,409

Booked - Listing Nights

		July	August	September	October	November	December	January	February	March	April	May	June	Total Year
2015	2014/15				1,047	905	1,201	967	892	1,246	1,067	1,257	1,643	10,225
2016	2015/16	2,367	2,324	1,508	1,562	1,749	2,742	2,406	2,722	3,196	2,940	3,457	4,686	31,659
2017	2016/17	5,992	5,672	5,064	3,811	3,278	4,874	4,002	4,657	6,445	5,464	6,624	9,850	65,733
2018	2017/18	14,780	16,349	11,550	8,438	6,881	9,662	7,191	7,222	8,477	9,000	11,780	13,366	124,696
2019	2018/19	19,386	18,527	14,805	10,656	8,517	11,224	9,811	9,516	11,983	12,312	12,978	17,660	157,375
2020	2019/20	20,769	22,671	18,187	13,651	12,334	16,695	18,859	19,801	15,387	10,133			168,487

Revenue ($)

		July	August	September	October	November	December	January	February	March	April	May	June	Total Year
2015	2014/15				$144,528	$125,496	$177,544	$134,065	$122,668	$178,253	$147,769	$192,170	$260,958	$ 1,483,450.22
2016	2015/16	$399,668	$396,335	$245,744	$238,221	$321,694	$566,031	$455,215	$523,060	$629,484	$533,051	$696,274	$991,839	$ 5,996,615.25
2017	2016/17	$1,323,932	$1,238,595	$1,071,694	$702,825	$631,900	$999,267	$820,490	$935,684	$1,280,686	$1,104,985	$1,379,382	$2,330,412	$ 13,819,851.93
2018	2017/18	$3,777,916	$4,423,385	$2,575,419	$1,643,047	$1,453,611	$2,184,385	$1,373,193	$1,384,241	$1,684,210	$1,849,950	$3,054,201	$3,150,366	$ 28,553,925.07
2019	2018/19	$5,007,016	$4,371,075	$3,127,408	$1,997,148	$1,718,645	$2,501,268	$2,033,035	$1,973,428	$2,453,999	$2,372,399	$2,695,271	$3,924,582	$ 34,175,274.93
2020	2019/20	$5,086,536	$5,642,812	$3,746,158	$2,780,982	$2,732,351	$3,410,789	$3,522,673	$3,547,745	$2,642,256	$1,760,913			$34,873,213.35

Industry Briefing – Recent Hotel Occupancy Data

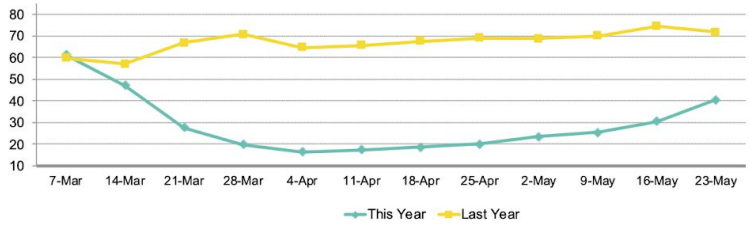
Tab 3 - Day Trend Bend, OR+: Visit Bend

Visit Bend

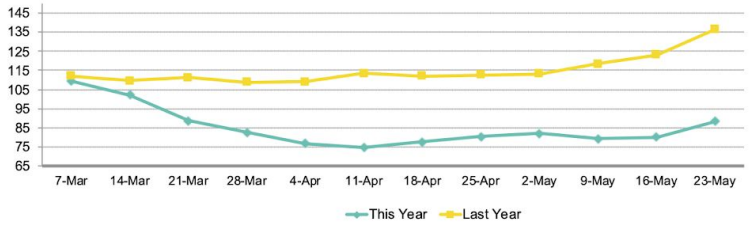
For the Week of May 17, 2020 to May 23, 2020

Currency: USD - US Dollar

Weekly Occ (%) - Mar 07, 2020 to May 23, 2020



Weekly ADR - Mar 07, 2020 to May 23, 2020



	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa			
																						Current Week									
Occupancy (%)	Apr					May																							Current Week	Run 28	Run MTD
	26	27	28	29	30	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23			
This Year	17.6	23.7	24.8	26.6	23.9	23.2	24.7	20.3	25.6	28.7	28.6	25.2	25.4	25.2	23.4	32.1	31.7	32.1	31.9	32.1	31.3	26.2	33.6	35.4	36.9	39.0	47.7	65.3	40.6	30.1	31.5
Last Year	48.0	64.4	70.7	71.7	71.6	74.0	80.6	47.4	68.2	78.3	88.1	79.9	64.3	63.2	43.9	71.9	82.3	88.5	86.5	72.7	75.9	47.9	65.7	75.7	74.6	65.2	79.7	94.0	71.8	71.3	71.2
Percent Change	-63.4	-63.2	-64.9	-62.9	-66.6	-68.7	-69.4	-57.1	-62.5	-63.3	-67.5	-68.5	-60.6	-60.1	-46.7	-55.4	-61.5	-63.7	-63.2	-55.8	-58.8	-45.2	-48.9	-53.3	-50.6	-40.1	-40.1	-30.5	-43.5	-57.8	-55.7
ADR	Apr					May																							Current Week	Run 28	Run MTD
	26	27	28	29	30	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23			
This Year	80.93	80.31	80.38	84.55	82.25	80.77	83.83	75.25	78.43	77.91	79.72	77.20	81.16	83.40	75.92	75.47	77.29	79.45	78.61	84.61	88.30	77.78	78.71	81.93	82.78	83.90	95.55	101.50	88.34	83.03	83.23
Last Year	103.23	107.78	114.26	115.11	110.67	117.62	119.07	104.37	115.46	122.69	126.72	121.77	115.36	114.04	108.24	119.35	125.22	128.69	129.66	121.26	120.61	112.65	119.04	128.01	127.05	123.46	152.49	170.18	136.41	122.91	120.31
Percent Change	-21.6	-25.5	-29.6	-26.6	-25.7	-31.3	-29.6	-27.9	-32.1	-36.5	-37.1	-36.6	-29.6	-26.9	-29.9	-36.8	-38.3	-38.3	-39.4	-30.2	-26.8	-31.0	-33.9	-36.0	-34.8	-32.0	-37.3	-40.4	-35.2	-32.4	-30.8
RevPAR	Apr					May																							Current Week	Run 28	Run MTD
	26	27	28	29	30	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23			
This Year	14.21	19.04	19.95	22.51	19.67	18.74	20.69	15.28	20.05	22.38	22.80	19.43	20.59	21.05	17.74	24.19	24.52	25.54	25.04	27.20	27.63	20.40	26.42	28.98	30.51	32.74	45.62	66.30	35.85	24.99	26.25
Last Year	49.57	69.43	80.80	82.58	79.22	87.05	96.00	49.45	78.74	96.10	111.61	97.28	74.20	72.11	47.48	85.81	103.08	113.88	112.12	88.19	91.58	53.95	78.20	96.95	94.84	80.48	121.53	160.01	97.99	87.58	85.69
Percent Change	-71.3	-72.6	-75.3	-72.7	-75.2	-78.5	-78.4	-69.1	-74.5	-76.7	-79.6	-80.0	-72.2	-70.8	-62.6	-71.8	-76.2	-77.6	-77.7	-69.2	-69.8	-62.2	-66.2	-70.1	-67.8	-59.3	-62.5	-58.6	-63.4	-71.5	-69.4
Supply	Apr					May																							Current Week	Run 28	Run MTD
	26	27	28	29	30	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23			
This Year	2,978	2,978	2,978	2,978	2,978	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	21,273	84,787	69,897
Last Year	3,128	3,128	3,128	3,128	3,128	3,128	3,128	3,128	3,128	3,128	3,128	3,128	3,128	3,128	3,128	3,128	3,128	3,128	3,128	3,128	3,128	3,128	3,128	3,128	3,128	3,128	3,128	3,128	21,896	87,584	71,944
Percent Change	-4.8	-4.8	-4.8	-4.8	-4.8	-2.8	-2.8	-2.8	-2.8	-2.8	-2.8	-2.8	-2.8	-2.8	-2.8	-2.8	-2.8	-2.8	-2.8	-2.8	-2.8	-2.8	-2.8	-2.8	-2.8	-2.8	-2.8	-2.8	-2.8	-3.2	-2.8
Demand	Apr					May																							Current Week	Run 28	Run MTD
	26	27	28	29	30	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23			
This Year	523	706	739	793	712	705	750	617	777	873	869	765	771	767	710	974	964	977	968	977	951	797	1,020	1,075	1,120	1,186	1,451	1,985	8,634	25,522	22,049
Last Year	1,502	2,015	2,212	2,244	2,239	2,315	2,522	1,482	2,133	2,450	2,755	2,499	2,012	1,978	1,372	2,249	2,575	2,768	2,705	2,275	2,375	1,498	2,055	2,369	2,335	2,039	2,493	2,941	15,730	62,407	51,244
Percent Change	-65.2	-65.0	-66.6	-64.7	-68.2	-69.5	-70.3	-58.4	-63.6	-64.4	-68.5	-69.4	-61.7	-61.2	-48.3	-56.7	-62.6	-64.7	-64.2	-57.1	-60.0	-46.8	-50.4	-54.6	-52.0	-41.8	-41.8	-32.5	-45.1	-59.1	-57.0
Revenue	Apr					May																							Current Week	Run 28	Run MTD
	26	27	28	29	30	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23			
This Year	42,324	56,702	59,402	67,045	58,563	56,941	62,875	46,428	60,944	68,015	69,280	59,061	62,578	63,970	53,902	73,512	74,511	77,620	76,091	82,669	83,975	61,993	80,287	88,079	92,718	99,505	138,640	201,471	762,692	2,119,099	1,835,064
Last Year	155,059	217,181	252,740	258,316	247,789	272,299	300,303	154,669	246,286	300,596	349,102	304,302	232,099	225,563	148,504	268,421	322,436	356,212	350,723	275,864	286,448	168,747	244,623	303,251	296,653	251,739	380,159	500,508	2,145,681	7,670,592	6,164,945
Percent Change	-72.7	-73.9	-76.5	-74.0	-76.4	-79.1	-79.1	-70.0	-75.3	-77.4	-80.2	-80.6	-73.0	-71.6	-63.7	-72.6	-76.9	-78.2	-78.3	-70.0	-70.7	-63.3	-67.2	-71.0	-68.7	-60.5	-63.5	-59.7	-64.5	-72.4	-70.2
Census %	Apr					May																									
	26	27	28	29	30	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23			
Census Props	40	40	40	40	40	41	41	41	41	41	41	41	41	41	41	41	41	41	41	41	41	41	41	41	41	41	41	41			
Census Rooms	2,978	2,978	2,978	2,978	2,978	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039	3,039			
% Rooms Participants	72.1	72.1	72.1	72.1	72.1	70.6	70.6	70.6	70.0	70.6	70.6	70.6	70.6	70.6	66.8	70.6	70.6	70.6	70.6	70.6	70.6	70.6	70.6	70.6	70.6	70.6	70.6	70.6			

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Industry Briefing – Traveler Sentiment

Industry Briefing – Traveler Sentiment

Americans Who Will Take a Vacation/ Weekend Getaway for their Next Trip

45% Already Know Exactly Where They Will Go

42% Will Travel in their Personal Car

84% Will Stay in the United States

Average Trip Distance: **539 Miles**

40% Will Visit a Beach Destination

44% Will Visit a Park on their Trip

55% Will Stay in a Hotel

74% Will Go to Restaurants

79% Will Research How Their Destination is Managing the Covid-19 Situation

Destination Analysts

Preparations Already Completed for Next Leisure Trip

(% of travelers selecting any of the following)

Talked to friends/relatives about trip (31.7%)

Researched things to see and do on trip (23.3%)

Booked hotel, motel or inn (22.4%)

Bought plane tickets (17.9%)

Booked passage of a cruise liner (9.7%)

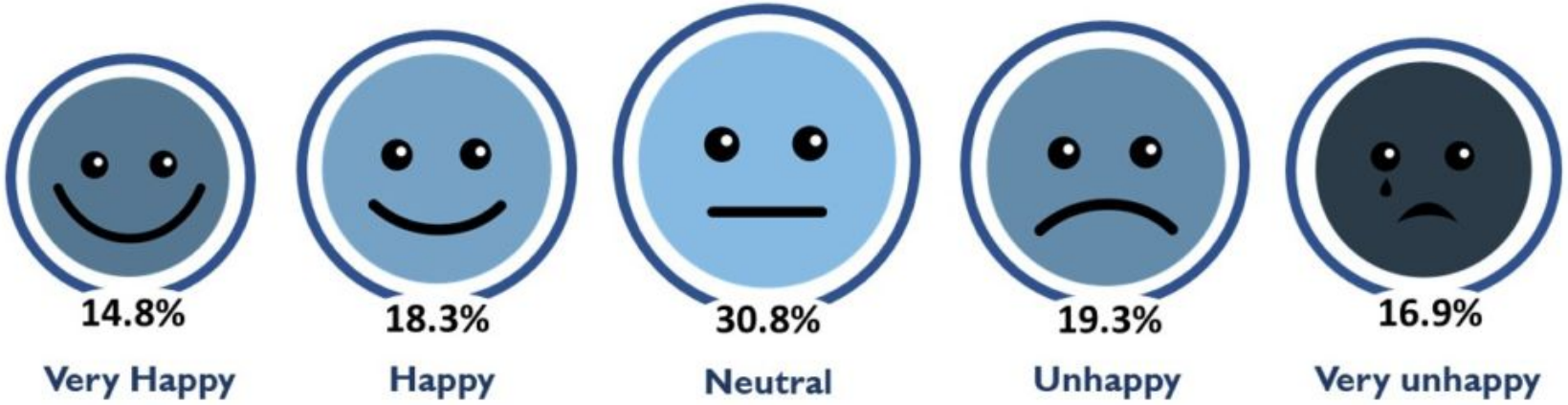
Purchased train tickets (5.6%)

None of these (29.6%)

Destination Analysts

Industry Briefing – Community Sentiment

How would you feel if you saw an advertisement today promoting your community as a place for tourists to come visit when it is safe?



Destination Analysts

Visit Bend

COVID-19 Recovery Strategy

VISIT BEND BEND

Hyper-local // Never Have I Ever ⟶ This Is Bend

Outdoors — Solo/few people: hiking, SUP, fishing, waterfalls, POI, kayak/canoe, trail running ⟶ Small groups — lake picnics, river, beer, gravel biking, MTB

STRATEGY

COVID-19

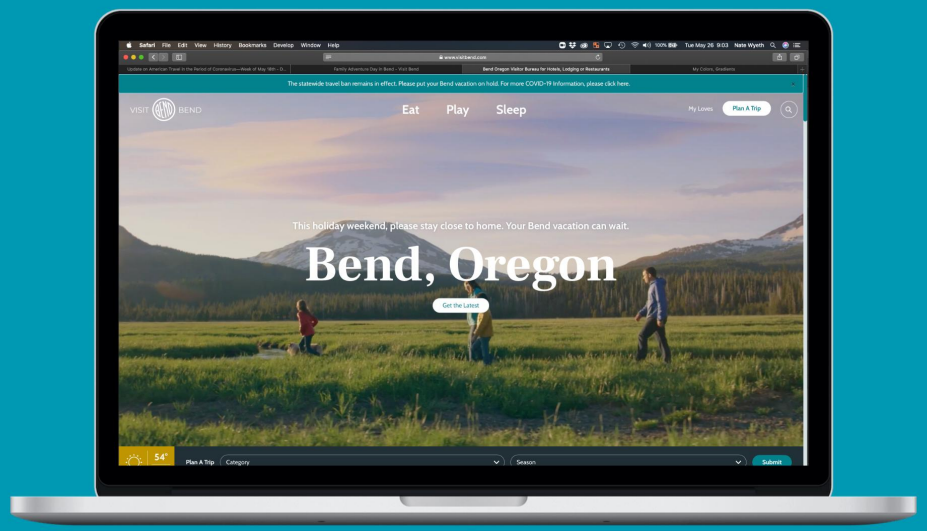
- Building website functionality, updating website content
- Blog posts to align with kindness, indoor life, etc.
- Standard social posting
- Number of new COVID-19 cases in OR decreases
  - Phase I Oregon Re-opening
- Hyperlocal campaign development
- Restaurants + bars + limited services open
- PR
- Hyperlocal organic launch to locals
- Organic posts to social + 3rd Party Platforms
- People resume planning travel
  - USFS opens trailheads and day use areas
- This Is Bend Campaign Developement
- Travel restrictions lifted by Governor
  - Phase II Oregon Re-opening
- Regional targeting
- Digital advertising
- Native Display Ads - blog content or landing pages
- Engage Influencers + Traditional journalists
- Hotels + STRs see rise in occupancy
- Portland, larger market targeting
- Radio - OPB, etc.
- Television
- Vaccine

VISIT BEND

Summer 2020 Marketing Plan

Reminder: Not the Time to Visit Bend

Visit Bend currently finds itself in a place where it is necessary to flip its core function, discourage travel, slash budgets, and halt out of area marketing, all while being aware of the toll the closure is having on those that depend on tourism to thrive.



Never Have I Ever Campaign Overview

The Never Have I Ever campaign is a take on the adolescent game encouraging locals and regional visitors to discover attractions, restaurants, tours, and other draws that they have not yet experienced during their time in Bend.

Bend Ale Trail – COVID Version

In June the Bend Ale Trail turns 10 years old. However, the planning and launch have been put on hold.

With restaurants and bars re-opening, we have an opportunity to engage with locals while introducing some new breweries as part of this interim Bend Ale Trail campaign. Prizing and redemption will be easier and will help to facilitate the economic recovery.

COVID-19 Recovery – Media Strategy

1. Following our organic, local push, we'll spend a small amount on the targeting of repeat visitors as travel restrictions are eased. **TIMING:** When appropriate to do so. In line with gov't recommendations (June-July). **GOALS:** Spur economic recovery, drive referral traffic, increase engagement. **TACTICS:** Paid social, programmatic, PR, influencers, native, owned media.

2. Expand to primary demographics in Portland Metro + Oregon. **TIMING:** TBD based upon guidance from officials (July-August). **GOALS:** Continue economic recovery, driver referral traffic, increase engagement. **TACTICS:** Paid social, programmatic, native, video, PR, influencers, connected TV, OPB, streaming audio.

3. Full transition from Never Have I Ever to This Is Bend. Primarily Portland + I-5 corridor targeting identified cohorts. **TIMING:** September onward if prior goals are met. **GOALS:** Website traffic (referral traffic), CTR, TRT, Occupancy demand, engagement. **TACTICS:** paid social, programmatic, native, video, PR, influencers, connected TV, cable + broadcast TV, streaming audio, terrestrial radio, podcasts, print.

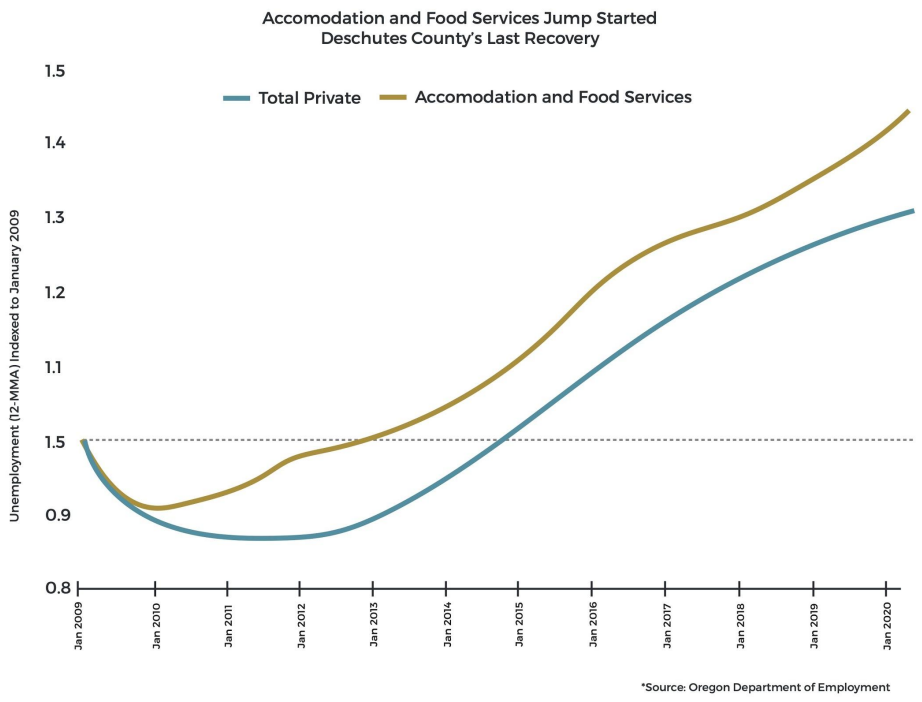
*We do not intend to spend any money marketing until the travel bans have been lifted. All investments are subject to change and based upon best financial forecasts.

Visit Bend

Forecasting & Business Plan

VISIT BEND BEND

The Economics of Recovery



Travel, both business and pleasure, were placed on hold for two months and are now only beginning to slowly ramp back up. Restaurants were closed across the nation and those that stayed open only offered limited takeout menus. Although other industries, such as personal care services, health care, and education have seen significant impacts they do not compare to the disruption we have seen in the leisure and hospitality sector.

Despite the severity of this current shock there is some room for optimism. The travel and tourism sector is very resilient, particularly here in Central Oregon. Coming out of the Great Recession the travel and tourism sector began to rebound and add jobs years before any other industry started posting notable job gains.

As we begin to shift our focus towards the recovery from the Great Lockdown we can be confident that once the health crisis is resolved that our local economy and the leisure and hospitality sector will bounce back relatively quickly, just as we have in the past.

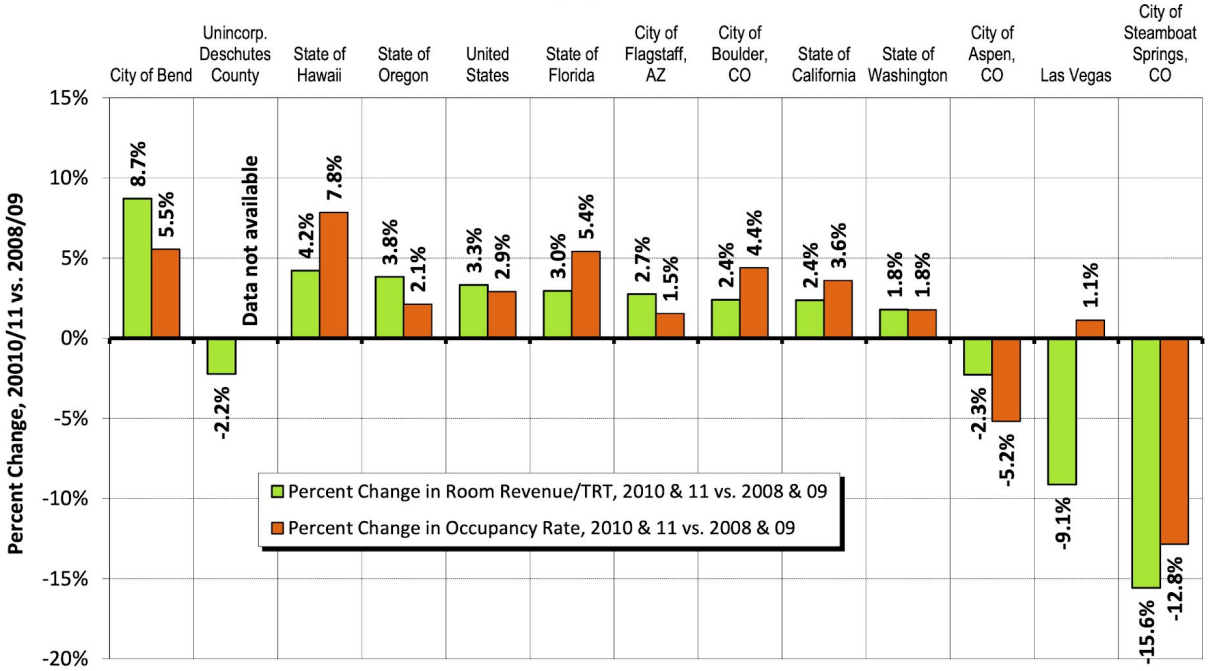
*Data and words from Damon Runberg, State of Oregon Economist

The Economics of Recovery

Recession Rebound Comparative Analysis

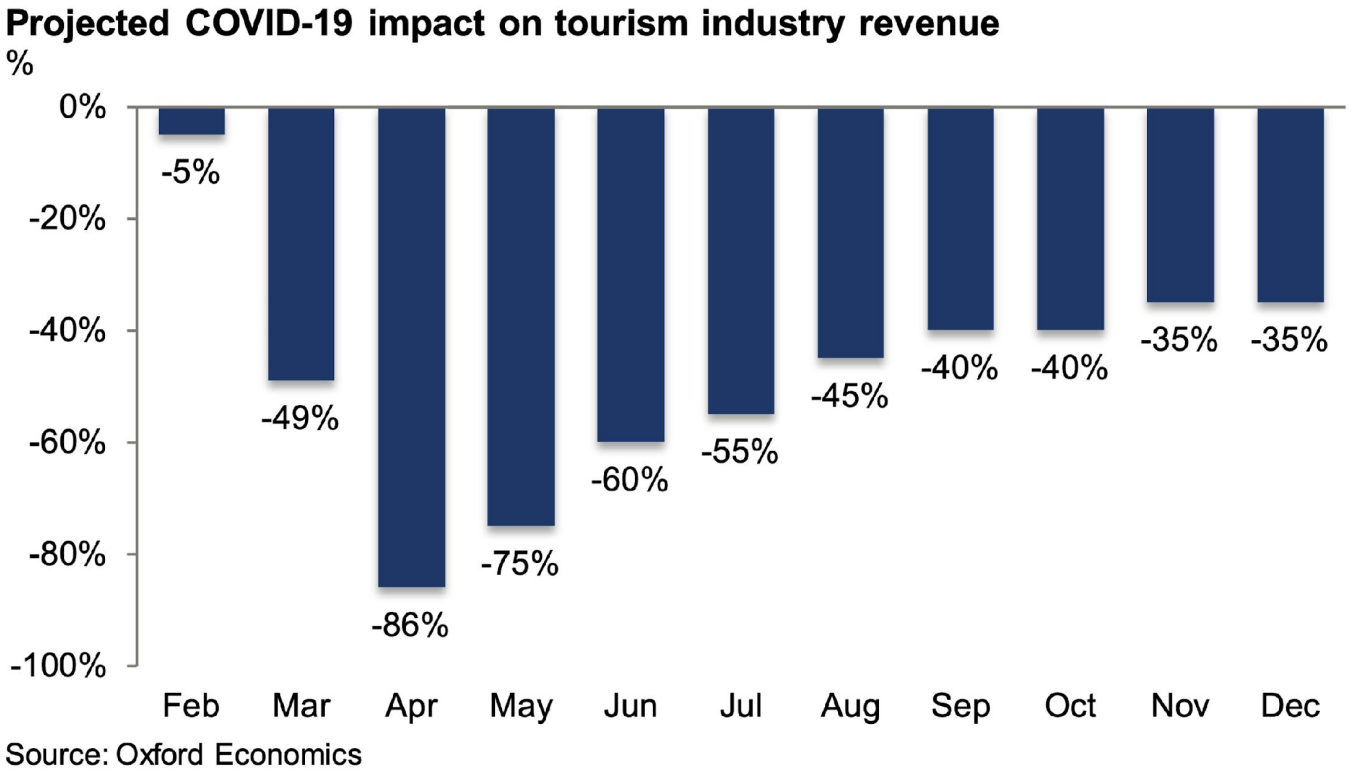
Estimated Percent Change in Hotel Room Revenues/TRT and Hotel Occupancy Rates

Bend vs. Selected Geographic Areas 2010 & 11 vs. 2008 & 09

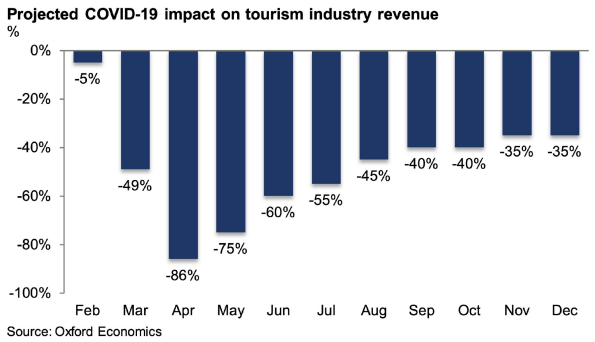


Source: STR (room revenue & occupancy); City of Bend (TRT); Deschutes County (TRT); City of Steamboat Springs (TRT); City of Boulder (TRT); City of Aspen (TRT).
Note: STR estimates of hotel occupancy & room revenue are based on reporting properties representing approximately 70% of U.S. hotel rooms, plus extrapolated estimates for non-reporting properties. STR is widely recognized as the global leader in hotel performance benchmarking.

Visit Bend – Financial Forecasting



Visit Bend – Financial Forecasting



Visit Bend
City Funding Revenue Forecast - Preliminary based upon Oxford Economics Forecast

Line Item Description	Actual May-19	Actual Jun-19	Actual Total - FY 2019	Actual Jul-19	Actual Aug-19	Actual Sep-19	Actual Oct-19	Actual Nov-19	Actual Dec-19	Actual Jan-20	Actual Feb-20	Actual Mar-20	Actual Apr-20	Forecast May-20	Forecast Jun-20	Forecast Total - FY 2020	Forecast Jul-20	Forecast Aug-20	Forecast Sep-20	Forecast Oct-20	Forecast Nov-20	Forecast Dec-20	Forecast Jan-21	Forecast Feb-21	Forecast Mar-21	Forecast Apr-21	Forecast May-21	Forecast Jun-21	Forecast Total - FY 2021
Forecasted YOY % Change per Oxford Economics Forecast	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	-86%	-75%	n/a	-60%	-55%	-45%	-40%	-40%	-35%	-35%	-30%	-30%	-30%	-25%	-25%	n/a
City Funding Revenue	218,353	292,502	**3,118,431**	380,868	540,987	428,619	313,019	260,351	160,924	177,499	189,623	198,802	93,342	30,569	73,126	**2,847,729**	152,347	243,444	235,740	187,811	156,211	104,601	115,374	132,736	139,161	65,339	22,927	54,844	**1,610,537**

Line Item Description	Actual Total - FY 2019	Forecast Total - FY 2020	Forecast Total - FY 2021	Forecast YOY Change $ - FY 2020	Forecast YOY Change $ - FY 2021	Forecast YOY Change % - FY 2020	Forecast YOY Change % - FY 2021
City Funding Revenue	3,118,431	**2,847,729**	**1,610,537**	(270,702)	(1,237,192)	**-8.7%**	**-43.4%**

Forecast * May-20	Forecast * Jun-20	Forecast Total - FY 2020	Forecast * Jul-20	Forecast * Aug-20	Forecast * Sep-20	Forecast * Oct-20	Forecast * Nov-20	Forecast * Dec-20	Forecast * Jan-21	Forecast * Feb-21	Forecast * Mar-21	Forecast** Apr-21	Forecast** May-21	Forecast** Jun-21	Forecast Total - FY 2021
-86%	-75%	n/a	-60%	-55%	-45%	-40%	-40%	-35%	-35%	-30%	-30%	-30%	-25%	-25%	n/a
30,569	73,126	**2,847,729**	152,347	243,444	235,740	187,811	156,211	104,601	115,374	132,736	139,161	165,772	187,318	201,866	**2,022,383**

FY 2021 Budget

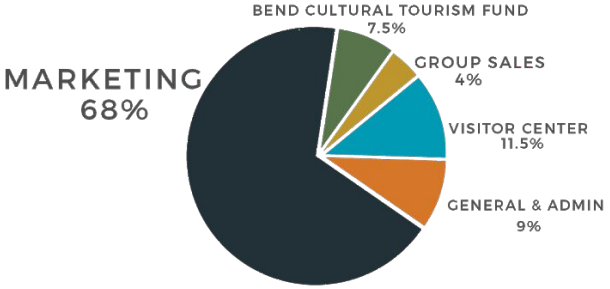
YEAR TO YEAR COMPARISON

REVENUE	FY 2020	FY 2021	VARIANCE $	VARIANCE %
City Funding - 9.0%	2,016,176	1,425,324	(590,852)	(29.3%)
City Funding - 1.4%	831,552	581,437	(250,116)	(60.2%)
City Funding - Prior Years	(70,200)	-	70,200	(100.0%)
Retail Sales	105,376	62,730	(42,646)	(40.5%)
Advertising	79,901	71,056	(8,845)	(11.1%)
Other Revenue	7,576	-	(7,576)	(100.0%)
Total	2,970,382	2,140,547	(829,835)	(27.9%)

EXPENSES	FY 2020	FY 2021	$	%
Marketing	1,703,353	1,516,715	(186,638)	(11.0%)
Group Sales	309,118	98,370	(210,748)	(68.2%)
Cultural Tourism Fund	217,915	160,107	(57,808)	(26.5%)
Visitor Center	292,879	325,016	32,137	11.0%
General & Administration	416,489	240,339	(176,151)	(42.3%)
Total	2,939,754	2,340,546	(599,208)	(20.4%)
NET INCOME (LOSS)	30,628	(200,000)	(230,627)	(753.0%)

PRIMARY BUDGET ALLOCATIONS

FY 2021



FY 2021 Strategic Plan

Following seven consecutive record years, Bend's tourism industry must be creative, innovative, and nimble as we start to recover from the devastating economic damage caused by the COVID-19 pandemic.

Visit Bend's strategic plan for FY2021 is to focus its resources on quality, branded destination marketing efforts. Reinvesting tourism dollars into programs that target and attract visitors who will leave a positive impact on the community will be Visit Bend's primary priority, focusing on quality over quantity. We will reinvent what it means to be a sustainable and responsible community, while again welcoming tourists who will leave a positive impact both financially and socially.

FY 2021 Primary Strategies

Economic Development: Visit Bend is constantly engaged in dialogue with similar mountain towns experiencing tourism-related issues stemming from from the COVID-19 pandemic. It is through this filter that Visit Bend is committed to a marketing plan that will responsibly promote tourism and help local businesses find stable ground as we generate tax revenue for the vital services supported by the city's general fund. Through Visit Bend's concious branding efforts, the team will develop and implement programs to aid in bringing back living-wage work in the hospitality industry, enhancing the city's year-round livability for guests and residents alike.

Stewardship: Despite the economic downturn related to COVID-19, Bend remains a popular retreat for outdoor recreation. This requires a robust platform encouraging sustainability and responsible behavior among all users. Visit Bend's sustainability efforts have been modeled by more than 20 similar mountain towns around the country, providing a toolkit and roadmap for a new generation of destination management organizations. Sustainability and stewardship will play a vital roll in Visit Bend's COVID-19 recovery strategy.

Brand Development: Advertising the Bend brand through strategically targeted media represents Visit Bend's largest driver of traffic to visitbend.com, which flows qualified traffic to stakeholders throughout the region. In FY2021, Visit Bend will reimagine what it means to be great storytellers, creating content that can be adapted more strategically to target the right audience throughout the long journey to economic recovery. Using research-based media buying, Visit Bend will efficiently spend its significantly-reduced advertising budget while supporting a brand reflective of Bend's values, maintaining the vision of our community for both visitors and locals.

Diversification of Tourism Offerings: Outdoor recreation is the foundation of Bend's tourism appeal, which is helpful for the recovery mission ahead. As part of Visit Bend's continued effort to diversify the city's tourism offerings, fiscal Year 2021 will continue cultivation of Bend's non-outdoor recreation tourism offerings, lending support to Bend's hampered arts + culture industry through the Bend Cultural Tourism Fund and other marketing campaigns. Additionally, Visit Bend-led campaigns including Tenth Month and Bend Ale Trail Month will increase shoulder season visitations and drive the economy during the slowest times of the year.

FY 2021 Goals + Objectives

ECONOMIC DEVELOPMENT

- Recover from monthly 85% YOY decreases in TRT collections to a 20% monthly YOY decrease by fiscal year end
- Continue to invest in arts + cultural programs through the BCTF, diversifying Bend's recovering tourism industry
- Wisely invest Visit Bend's reserve fund, created at the suggestion of city council, when the time is right to assist in the economic recovery and development
- Stabilize and grow jobs within the hospitality industry, course-correcting from a loss of nearly 7,000 local tourism-related jobs during the COVID-19 pandemic

BRAND DEVELOPMENT

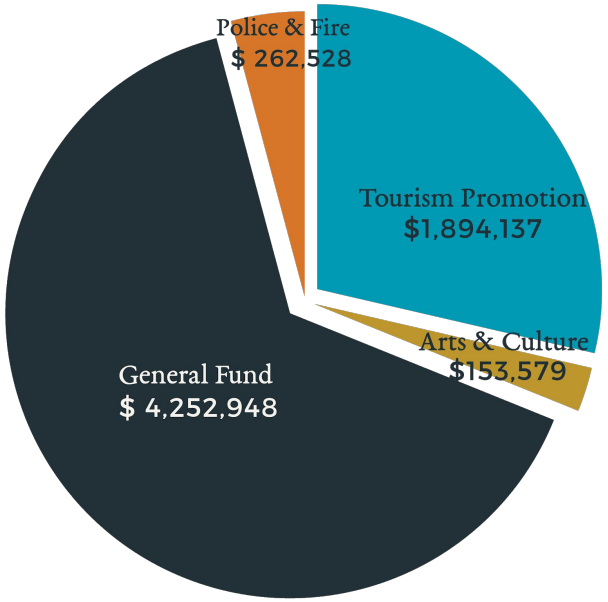
- Maintain Visit Bend's position as the most effective and most compassionate DMO in our region, serving as a model for destination marketing and management organizations during the recovery from the COVID-19 pandemic
- Launch This Is Bend signature campaign, providing a sense of pride to locals while effectively and considerately marketing our destination to visitors most likely to leave a positive impact on this community following their vacation

STEWARDSHIP

- Establish Bend as a leader in sustainable and responsible tourism through effective partnerships and collaborations which contribute to increased protection of our most valuable asset, the outdoors
- Increase reach and frequency of sustainability-related messaging to visitors once they're here, utilizing stronger partnerships and involvement with local land managers and nonprofit organizations

PROJECTED FY 2021 TOTAL TRT COLLECTIONS

$6,563,191



*FY2021 projected TRT is off 21.45% YOY from FY2020

VISIT BEND

Questions + Answers