

Travel Oregon has partnered with Dean Runyan Associates to provide the Travel Industry with a monthly "**Oregon Travel Barometer.**" The Barometer is a quick-read dashboard of key travel indicators designed to show changes in the metrics that affect Oregon's tourism industry. Where applicable there is a deeper dive available for each indicator, so you can review the data in greater detail.

November 2018 Report Highlights

Following are a few observations from the November 2018 Oregon Travel Barometer report:

- Oregon's statewide lodging demand and revenue continue to show positive growth in November 2018 (Lodging Demand: +4.6% YOY; Lodging Revenue: +5.3% YOY).
 - Among all Oregon regions Central Oregon reported the largest growth in lodging demand and revenue in November 2018. Mt.Hood/Gorge showed the biggest decrease in both lodging demand and revenue.
 - Year-over-year growth in Oregon's November lodging demand and revenue was higher than that of the national and regional averages.
- The West Coast (except California) average gasoline prices in November 2018 were 14.8% higher than a year before.
- The total number of deplaned passengers at Portland International Airport was up (4.4% YOY) in November 2018 versus November 2017.
- The number of international deplaned passengers at PDX increased (41.8% YOY) in November 2018 vs. November 2017.
- Employment in Oregon's Accommodation & Food Services sector was up 0.9% in November 2018 vs. November 2017.

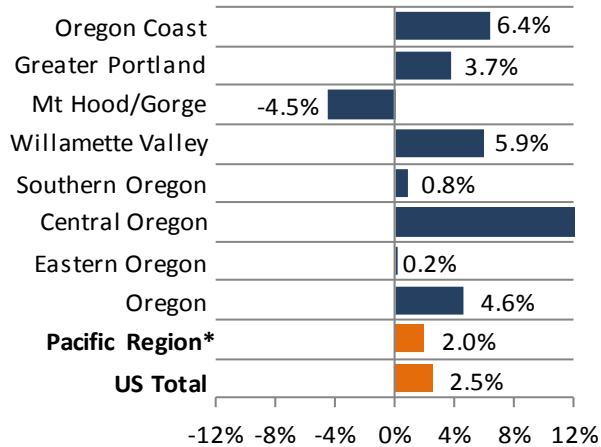
The Oregon Travel Barometer will be updated on a monthly basis (with lag time to compile the indicators). We will notify you via the Travel Oregon Industry eNewsletter as each new report becomes available (go to www.traveloregon.com/industry to subscribe). To see an archive of past Travel Barometers, [click here](#).

Many thanks,
The Travel Oregon Research Team

OREGON LODGING TRENDS¹

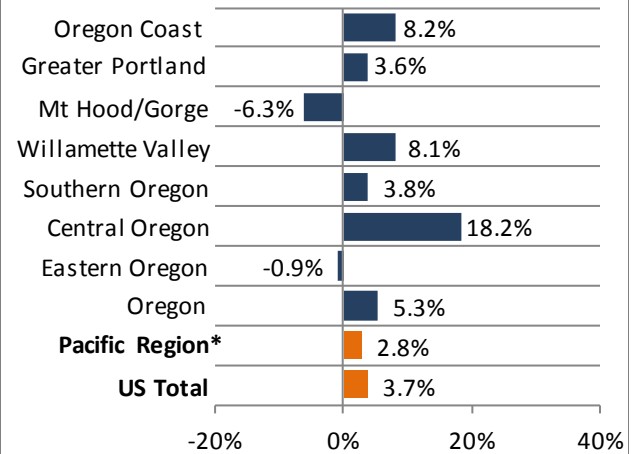
Yr/Yr Change in Lodging Demand Nov 2018

[Data](#)



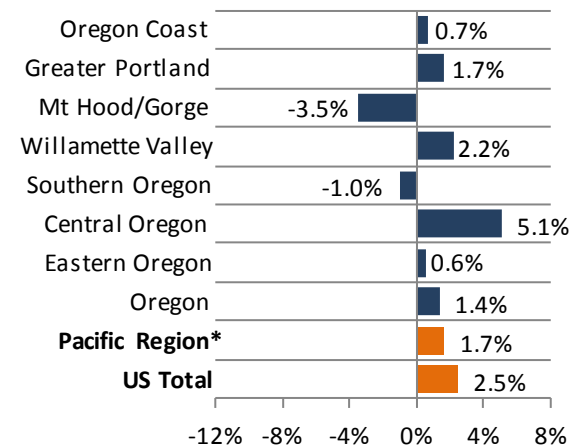
Yr/Yr Change in Lodging Revenue Nov 2018

[Data](#)



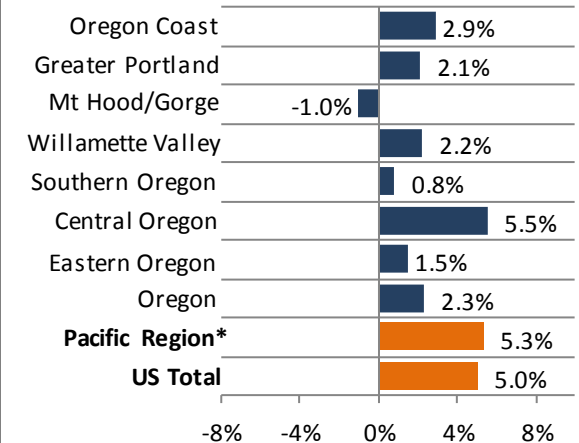
Yr/Yr Change in Lodging Demand Nov 2018 (YTD)

[Data](#)



Yr/Yr Change in Lodging Revenue Nov 2018 (YTD)

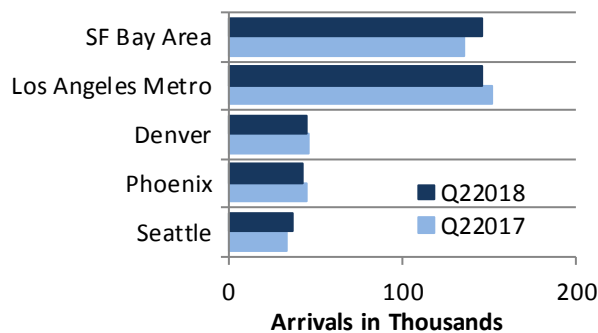
[Data](#)



OREGON DOMESTIC AIR TRAVEL²

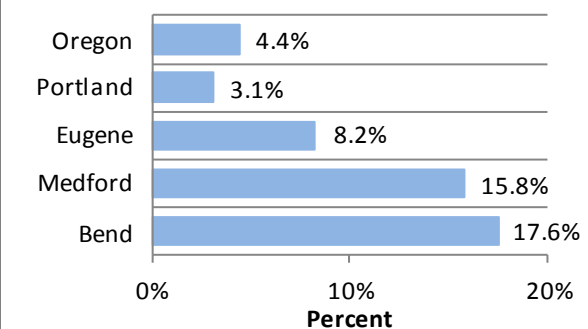
Top 5 Origin Markets: Q2 2018 vs. Q2 2017

[Data](#)



Yr/Yr Change in Air Arrivals: Q2 2018

[Data](#)



*The Pacific Region includes the states of Alaska, California, Hawaii, Oregon and Washington.

PRICES				TRANSPORTATION			
West Coast (except CA) Gas Prices (\$ per gallon)³ Data				Oregon Gasoline Volume (000 gals/day)⁷ Data			
Monthly: 2yrs	Nov 2018	Nov (%)	YTD ⁴ (%)	Monthly: 2yrs	Oct 2018	Oct (%)	YTD ⁴ (%)
	\$3.15	14.8%	16.1%		4,451.8	1.2%	-3.0%
Portland Metro Room Rates¹ Data				Domestic Air Visitors to Oregon² Data			
Monthly: 2yrs	Nov 2018	Nov (%)	YTD ⁴ (%)	Quarterly: 2yrs	Q2 2018	Q2 (%)	YTD ⁴ (%)
	\$127.60	-0.1%	0.4%		1,089,343	4.4%	6.0%
PDX Average Airfare per Passenger² Data				Total Deplanned Passengers at PDX⁸ Data			
Quarterly: 2yrs	Q2 2018	Q2 (%)	YTD ⁴ (%)	Monthly: 2yrs	Nov 2018	Nov (%)	YTD ⁴ (%)
	\$187.37	-1.5%	-0.7%		796,715	4.4%	4.5%
West Urban CPI Food Away From Home⁵ Data				International Deplanned Passengers at PDX⁸ Data			
Monthly: 2yrs	Nov 2018	Nov (%)	YTD ⁴ (%)	Monthly: 2yrs	Nov 2018	Nov (%)	YTD ⁴ (%)
	278.829	3.3%	3.4%		28,333	41.8%	15.8%
OREGON EMPLOYMENT⁶ (Seasonally Adjusted)				NATIONAL AND STATE INDICATORS (March 2007=100)			
Leisure & Hospitality Employment Data				Traveler Sentiment Index (TSI)⁹ –Likely Oregon Visitors			
Monthly: 2yrs	Nov 2018	Nov (%)	YTD ⁴ (%)	Quarterly: 2yrs	Q3 2018	Q3 (%)	
	210,600	0.7%	2.0%		126	-2.3%	
Accommodation & Food Services Employment Data				OR Index of Leading Economic Indicators (OILI)¹⁰ Data			
Monthly: 2yrs	Nov 2018	Nov (%)	YTD ⁴ (%)	Monthly: 2yrs	Nov 2018	Nov (%)	6Mo ¹¹ (%)
	183,500	0.9%	1.9%		101.70	1.1%	-1.2%

Sources and Notes:

- Lodging metrics are based on reports of STR, Inc.
- Domestic Air Travel data is based on the Origin and Destination Survey of the U.S. Department of Transportation. This survey represents a 10 percent sample of the ticket itineraries of domestic passenger flights of U.S. air carriers.
- U.S. Energy Information Administration, Regular All Formulations Retail Gasoline Prices
- YTD Year-over-Year Change is based on last available value for each metric.
- U.S. Bureau of Labor Statistics.
- Oregon Employment Department.
- U.S. Energy Information Administration
- Port of Portland, Aviation Statistics
- MMGY Global. TSI is a quarterly metric of consumer attitudes toward leisure travel based on available time and finances, interest, affordability, safety of travel and quality of service. The TSI is released in February (Q1), April (Q2), July (Q3) and October (Q4). Base: Total Respondents/Likely to visit Oregon.
- Oregon Office of Economic Analysis. The OILI applies the Conference Board’s methodology for the U.S. National Leading Index to Oregon-specific components. The OILI value is subject to change due to the standard deviation changes. It is released in February, May, August and November.
- 6 Month Annualized Change.

This report does not imply Oregon’s participation in any increase or decrease in the various metrics offered.