VISIT
CENTRAL
OREGON

MONTHLY RESEARCH UDPATE

JULY 2026 REVIEW

Executive Summary

VISIT CENTRAL OREGON

Central Oregon Tourism Trends

- Room night Demand among Central Oregon Region hotels declined in July, as properties sold 5.0% fewer room nights compared to one year prior. Room Supply dropped at a similar rate, down 4.9% Year-over-Year (YoY), netting flat (-0.1%) YoY Occupancy throughout the region. Central Oregon Region hotels averaged 80.2% Occupancy for the month. Average Daily Rate (ADR) also fell, dropping 6.7% YoY to land at $221 for the month.
    - Occupancy changes across the four regional submarkets ranged from a 6.8% increase in Redmond to a 5.1% decrease in Jefferson County. Average Occupancy hovered in the low 80s in all regions except Jefferson, which posted an Occupancy of 72.8%. ADR fell in three of the four submarkets, with only Jefferson County seeing an increase (+1.8%)
    - Year-To-Date through July, hotel performance across the region showed Demand falling at a slightly slower rate than Supply, resulting in an Occupancy gain of 0.7%. ADR dropped 2.6% and averaged $163.
        - *Note: STR has not published results for Crook County for several months due to lack of reporting properties in that market.*
- In July, short-term rental listing nights sold (Demand) throughout Central Oregon increased 0.4% compared to last year, while Available Listings (Supply) increased 1.5%. As a result, Occupancy rose 0.2% YoY to average 78.3% in July.
    - Occupancy grew in three of Central Oregon's six submarkets and declined in the other three. Prineville reported the greatest increase in Occupancy with a gain of 7.4%, and Maupin saw the greatest decrease of 4.5%.
    - ADR advanced in Central Oregon, rising 7.9% YoY across the region. All six submarkets posted ADR gains, with Maupin experiencing the greatest YoY increase (+16.6%).
    - Year-To-Date through July, Occupancy declined across the Central Oregon region and in all six submarkets. YTD ADR has increased throughout Central Oregon and in every submarket except Bend, which dropped 2.6%.
- Passenger volume at Redmond Municipal Airport (RDM) decreased in July, falling 4.9% YoY to 129,683 total passengers. Year-To-Date (YTD), RDM has welcomed 749,176 passengers – down just 0.5% compared to last year.

Source: STR, AirDNA, and Redmond Municipal Airport

Mountain Town Trends

VISIT CENTRAL OREGON

Regional Insights – July 2026
West Region Mountain Market Summary

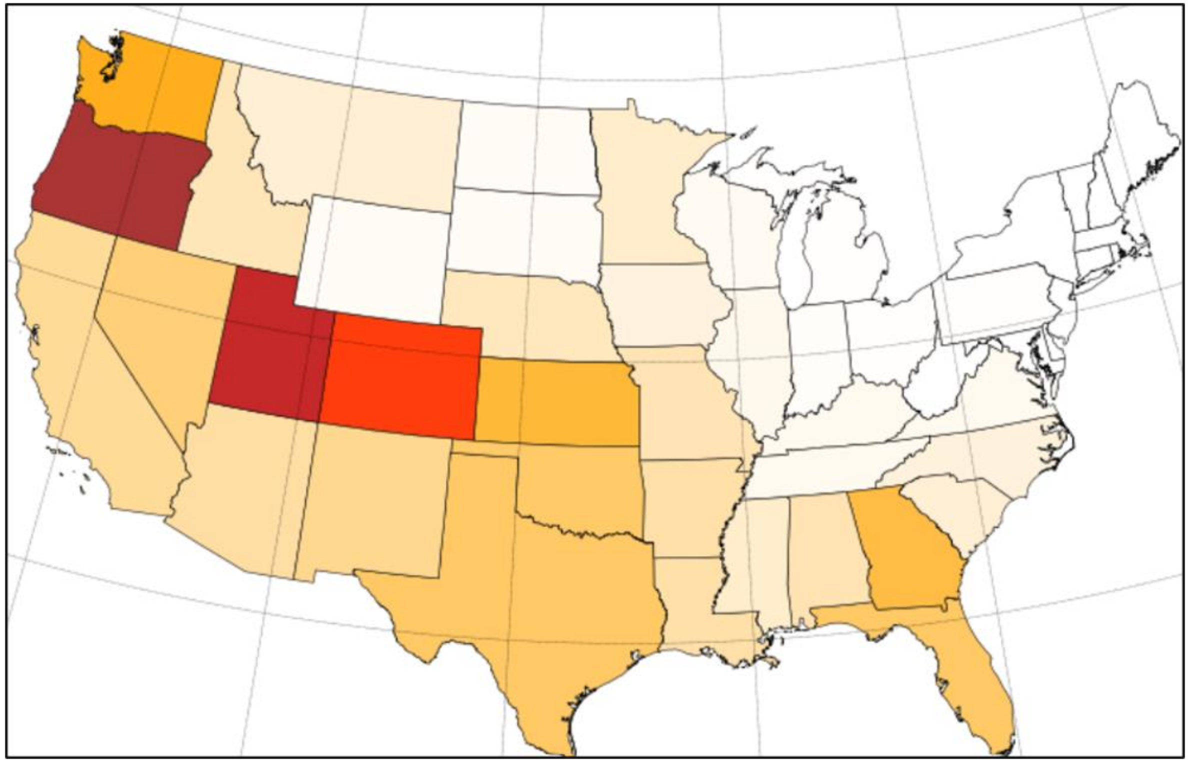
- “All three primary lodging metrics were almost unchanged between June 30 and July 31. Overall, seasonal occupancy is up 2.7% (2.8% last month), ADR is up 5.7% (5.6% last month), and RevPAR remains strong, up 8.6% (8.5% last month).”
- “4th of July was strong, but the rest of the month didn’t play out as hoped.”
- “Booking Pace was up 3.1% in July, but was weaker than last year, while the more affordable September and October were on the positive side of the booking spectrum.”
- “While it’s good to see December get a jump on booking pace, that may also reflect price sensitivity, with ADRs for the early winter down considerably.”
- “There is migration down from the top of the price ladder, with Luxury properties giving up some of their dominant strength to the less-pricey Moderate options, while Economy properties may be getting the benefit of a similar shift down from the Moderate tier.”

Source: DestiMetrics (8/13/2026)

Mountain Town Trends

Wildfire & Smoke Likely Playing a Role in July Activity

- "Wildfire was an issue throughout parts of the West in July, with significant fires in Colorado, Utah, Oregon, and Washington, while the Northern Rockies were largely spared."
- "Of particular note in the West are the Cottonwood fire in Utah, the Willow fire in Colorado, and at the end of the month the Grasshopper fire in Oregon."
- "Bookings made in July for arrival in July, show a drop in booking pace for the Pacific Northwest, Colorado, and Utah, while clearer areas such as the northern Rockies, the high Sierra, and Southeast paced positively versus last year."



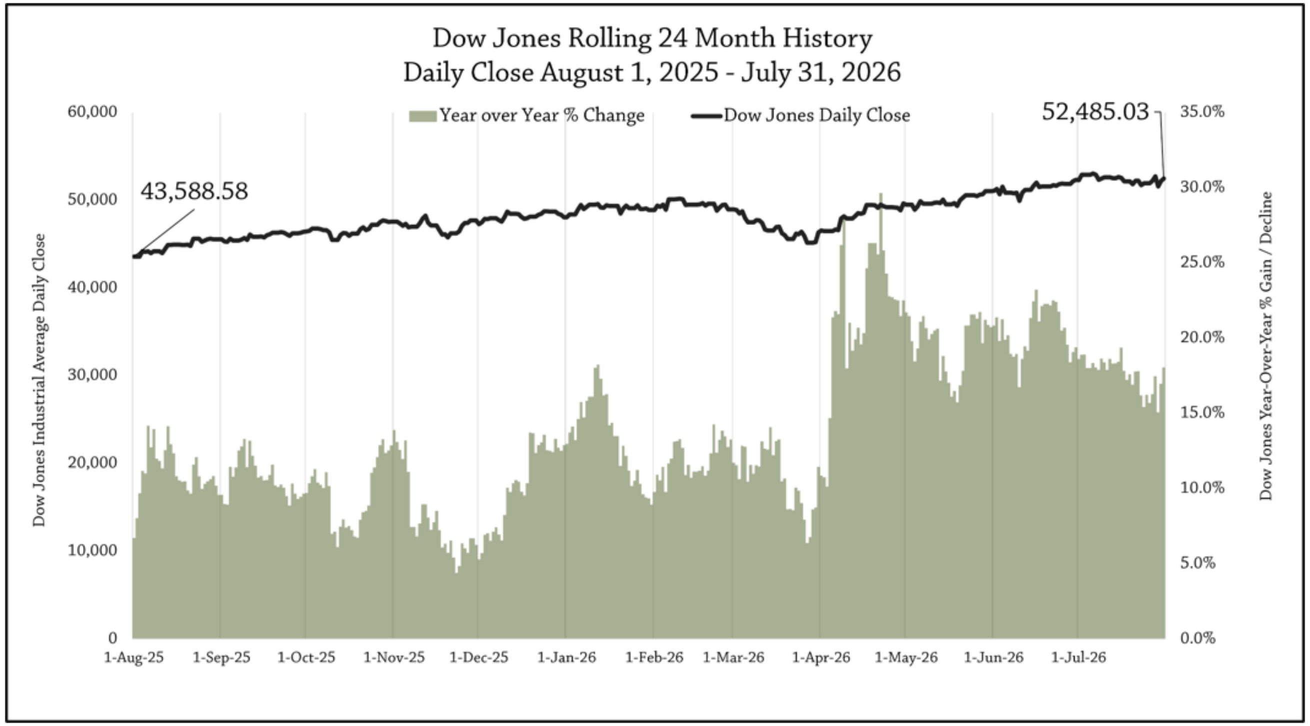
Source: DestiMetrics (8/13/2026)

U.S. Market Review

Economic Review

The Dow Jones Industrial Average

- "The DJIA was close to flat in July, adding just 0.3% over the course of the month, or 165.83 points."
- "This is the weakest month for the Dow since the war-inspired -5.4% decline in March, but the DJIA finished the month at another all-time high monthly close of 52,485.03 points."
- "This is the fourth consecutive record close for the market."
- "And while strong financial markets create wealth for invested consumers, there are signs that higher-end travel consumers are starting to feel the same pinch that economy and moderate level travelers have been experiencing for the better part of the last year."

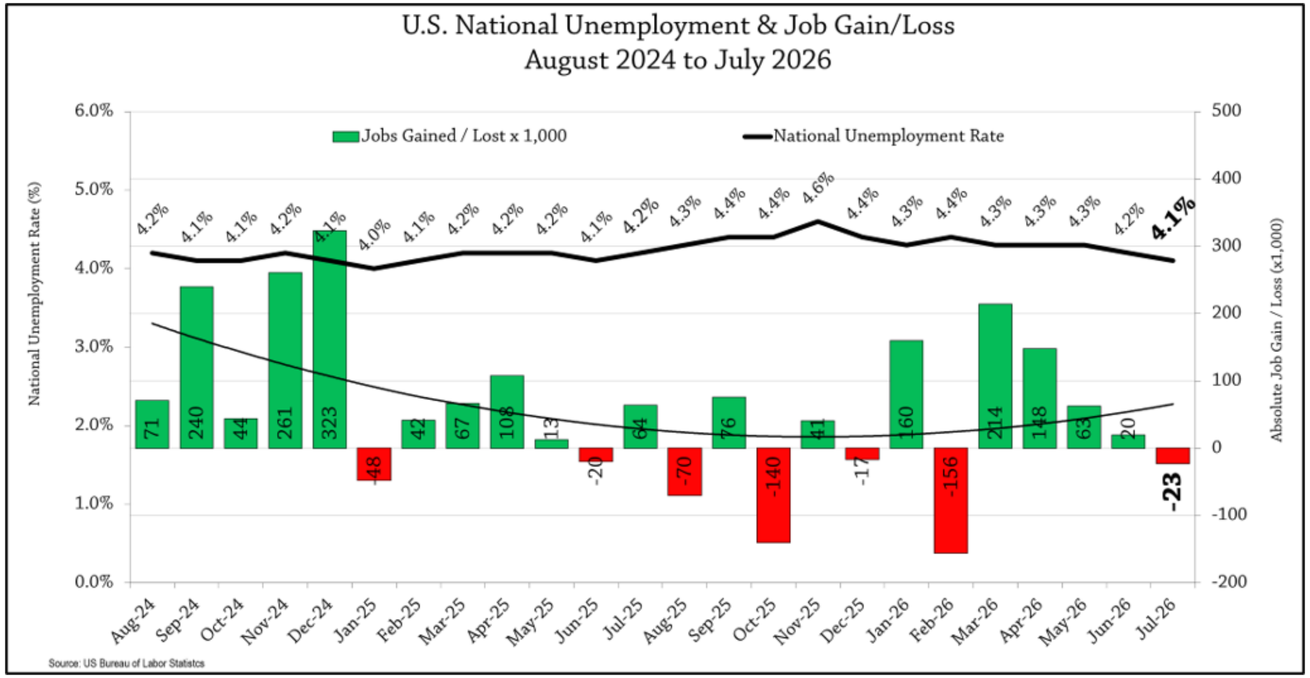


Source: *DestiMetrics (8/13/2026)*

Economic Review

The National Unemployment Rate

- "Job Creation and the National Unemployment Rate were both down in July, with job creation well short of estimates and unemployment easing a bit."
- "The economy shed 23,000 positions during the month, a net difference of -103,000 jobs from the original 80,000 gain that was forecast. Equally concerning is the adjustment to May and June numbers, with May adjusted down 66,000 and June by 37,000."
- "The unemployment rate was essentially unchanged, dropping slightly to 4.1% from 4.2% last month, with the lower number stemming from job seekers and workers leaving the workforce."
- "The Accommodations and Food Services subsector also lost jobs last month, with Accommodations bleeding 23,500 positions, while Food Services added a modest 2,600."

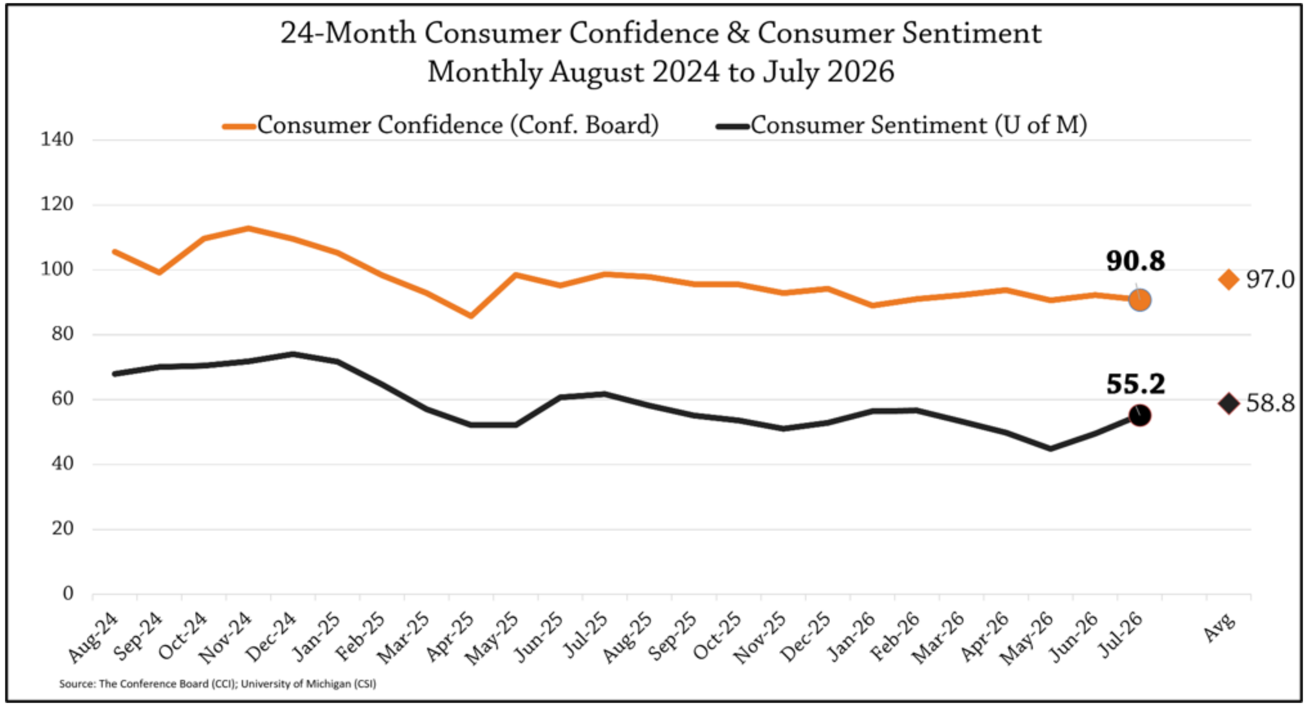


Source: DestiMetrics (8/13/2026)

Economic Review

The Consumer Confidence and Consumer Sentiment Index

- “The CCI and CSI went in different directions in July, with the CCI losing some ground from already stagnant levels, while the CSI jumped up into ‘less-bad’ territory after a few months near record lows.”
- “The CCI dropped a moderate -1.4 points from an upwardly adjusted June reading of 92.2 points.”
- “This is the 19th YOY decline in the CCI going back to January 2025, and the index has been below 100 points since then.”
- “Consumers’ feelings about current conditions declined in July and their outlook for the next six months was unchanged in weak territory, with both outlooks reflecting concerns about inflation and jobs.”
- “The CSI increased for the second month in a row, adding 5.7 points to last month’s 49.5 to bring it to 55.2.”



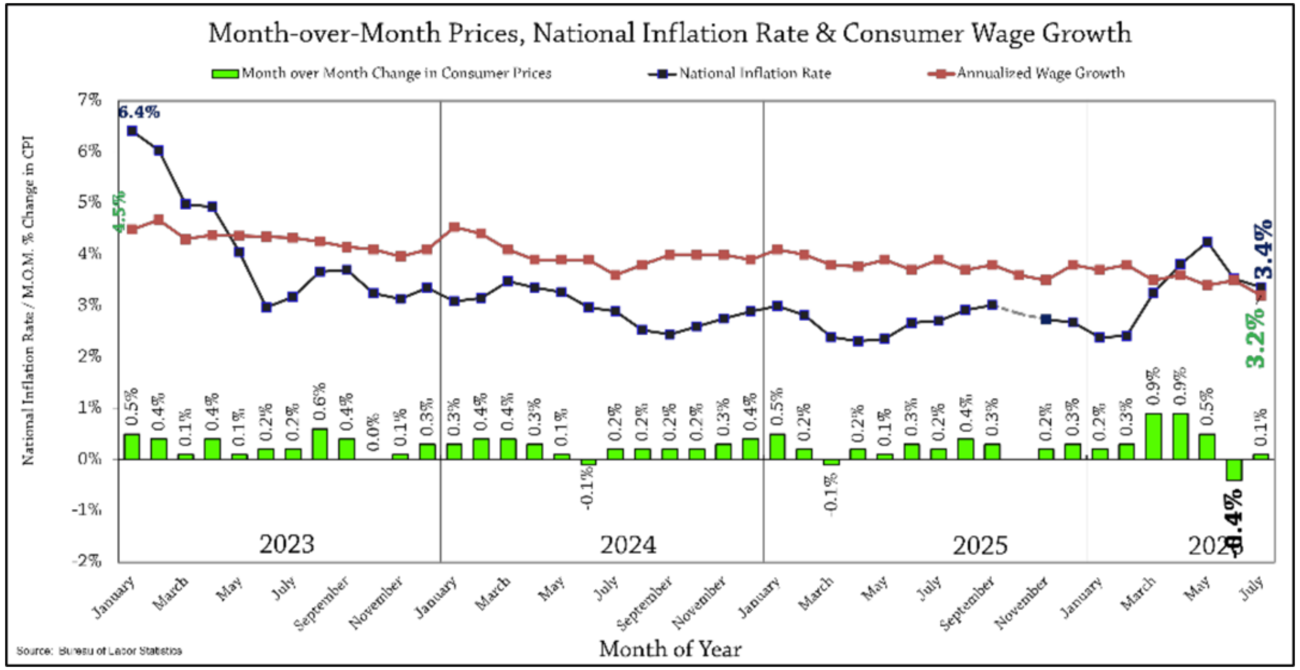
Source: DestiMetrics (8/13/2026)

Economic Review

VISIT CENTRAL OREGON

The National Inflation Rate

- “National Inflation Rate and the Consumer Price Index (CPI) rose a slight 0.1% in July from June, and the national inflation rate remained high at 3.4%.”
- “This is the fifth consecutive month that inflation has been above 3%, but it’s retreated from the 4.2% rate recorded in May.”
- “Key to the slight drop in inflation in July was an easing of energy prices, with gasoline down -2.1% from June, good news for the travel industry. But despite the decline, those same gas prices remain up a dramatic 24.6% from July 2025.”
- “Airfares were up 2.2% from last month, continuing their upward trend, and are currently up 25.5% YOY.”
- “Consumer prices are increasing faster than wages for three of the last four months.”



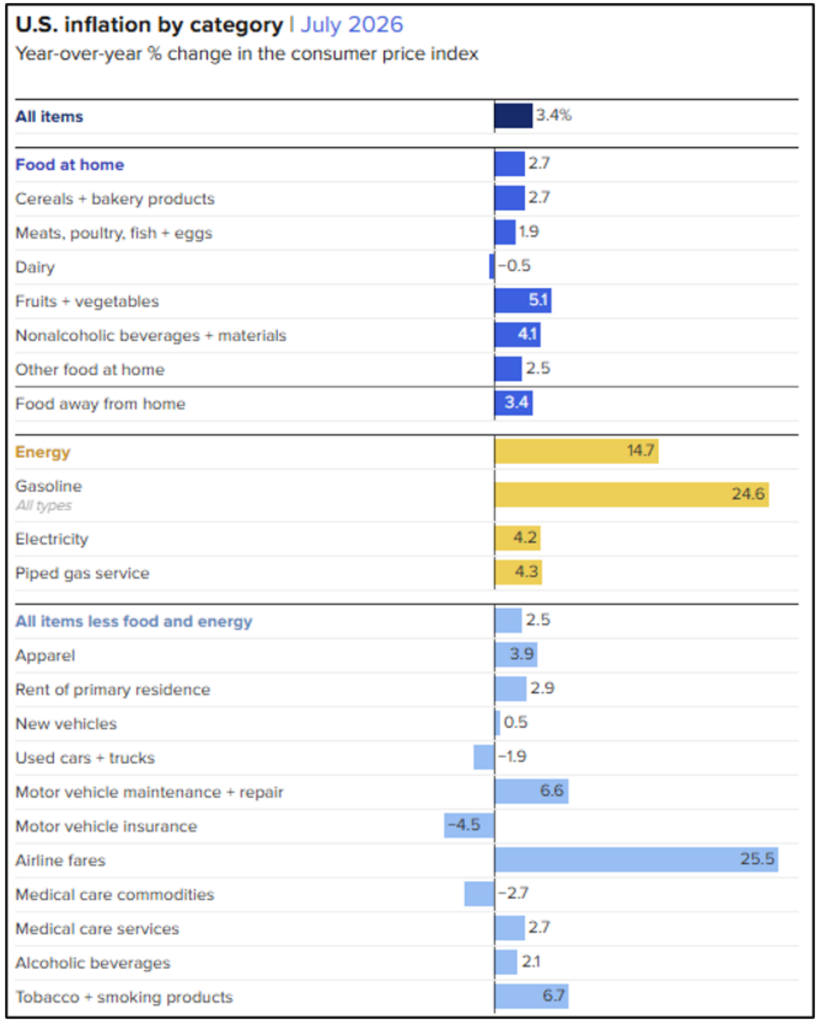
Source: *DestiMetrics (8/13/2026)*

Economic Review

VISIT CENTRAL OREGON

Inflation By Category

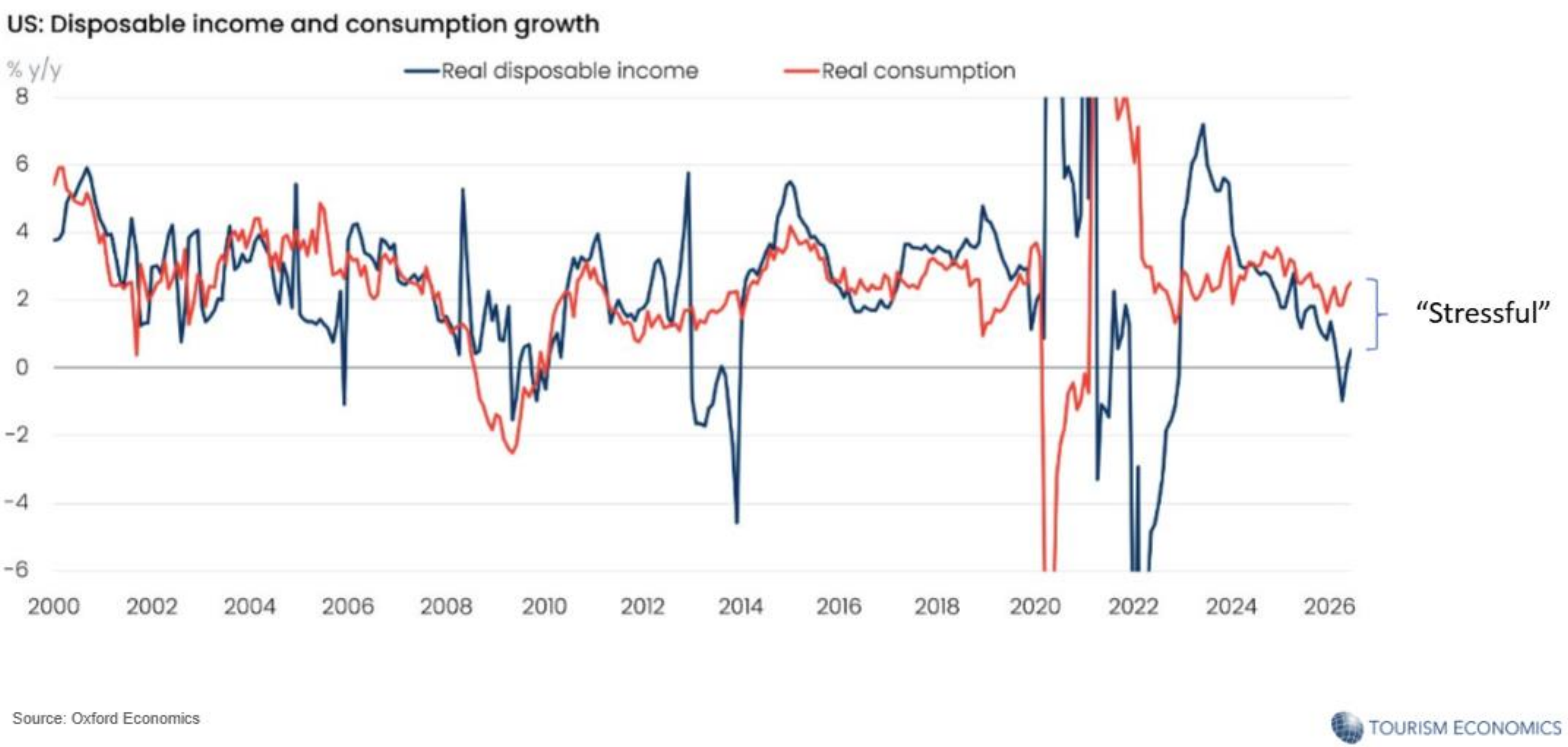
- "Consumer prices rose in July — a reversal of the pullback in June — but showed inflation broadly moderating, even as energy remained sharply higher than a year ago."
- "Energy prices increased 14.7% for the 12 months ended in July amid doubts that the U.S. and Iran could reach a broader resolution to the conflict."
- "Gasoline prices were up 24.6% over the year. Consumers paid a national average of $4.04 per gallon as of Wednesday, according to AAA — up from about $3.14 a year ago."
- "Airline fares also rose 25.5% over the past 12 months, according to the CPI data."
- "The oil shock didn't put too much pressure on grocery prices, which have been a particular pain point for most U.S. households. Food prices climbed 3% over the last year, according to the CPI data, with food at home prices up 2.7%."



Source: CNBC & BLS (8/12/2026)

U.S. Spending Trends

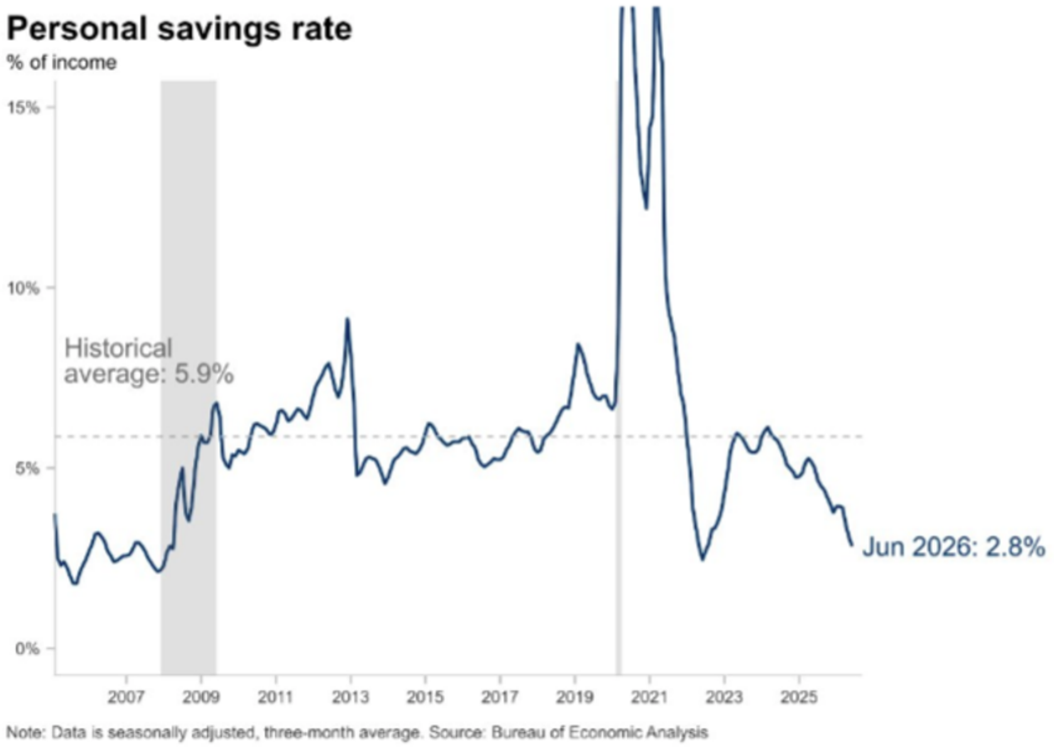
Spending is outpacing income



Source: Oxford Economics (August 2026)

U.S. Personal Saving Trends

Savings are taking a hit



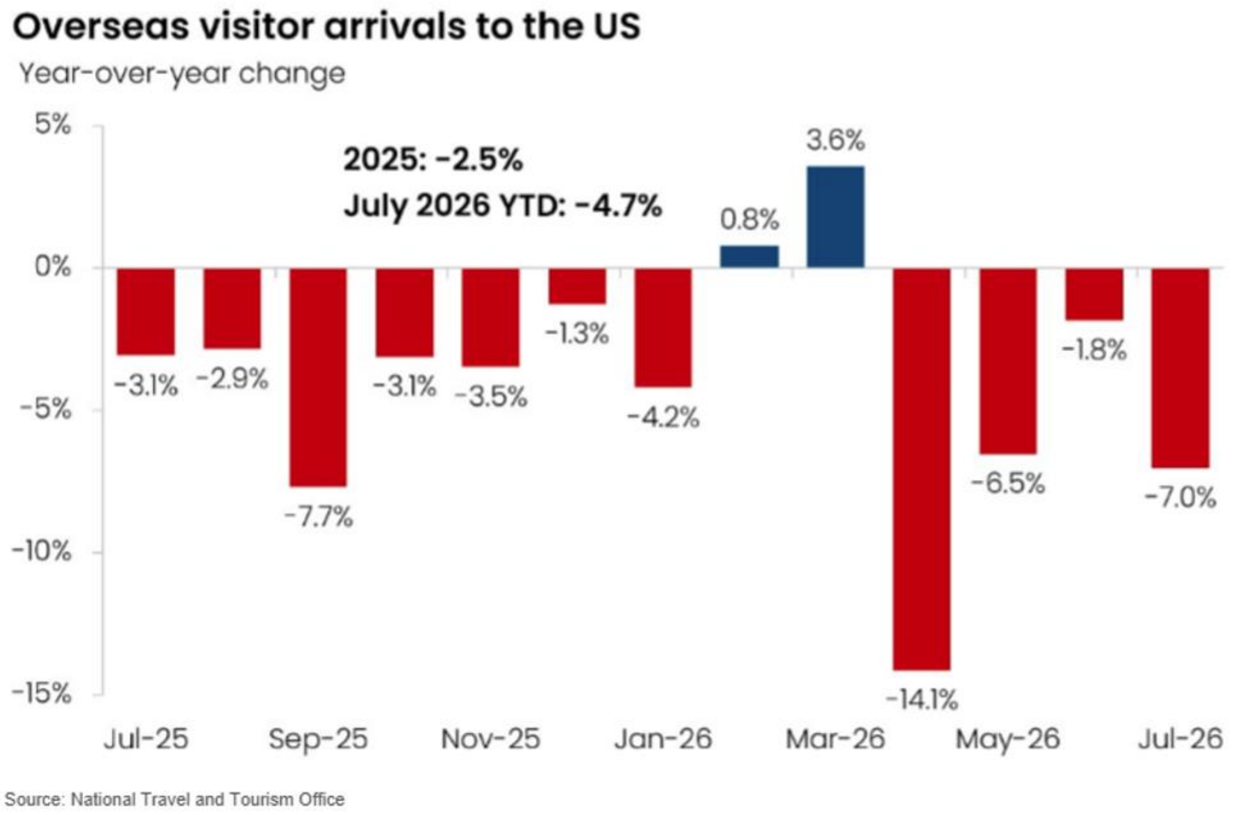
…so spending may lose momentum in the coming months

TOURISM ECONOMICS

Source: Bureau of Economic Analysis & Tourism Economics (August 2026)

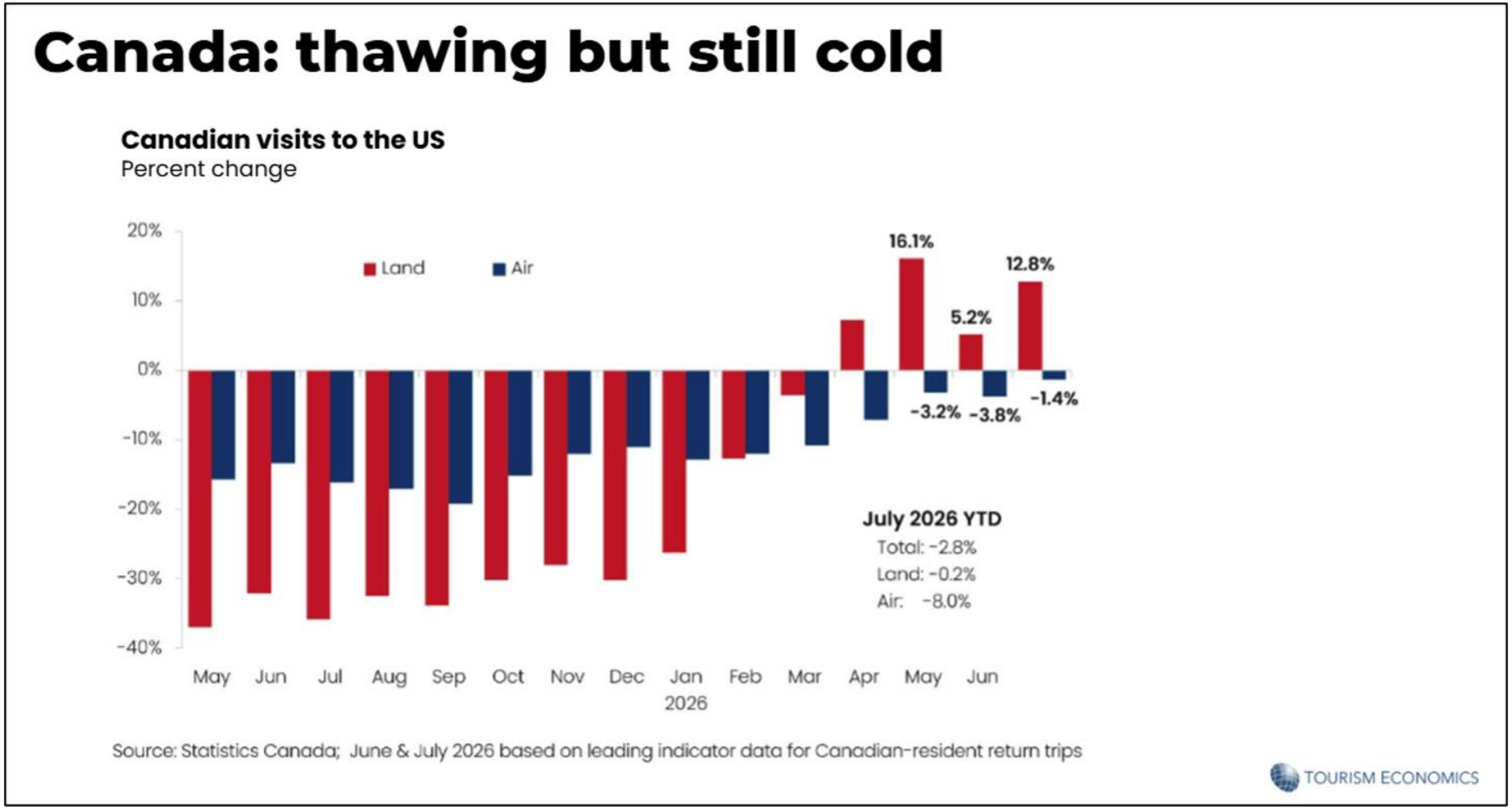
Overseas Visitation

Overseas visitors to the US in decline



Source: NTTO & Tourism Economics (August 2026)

Canadian Visitation

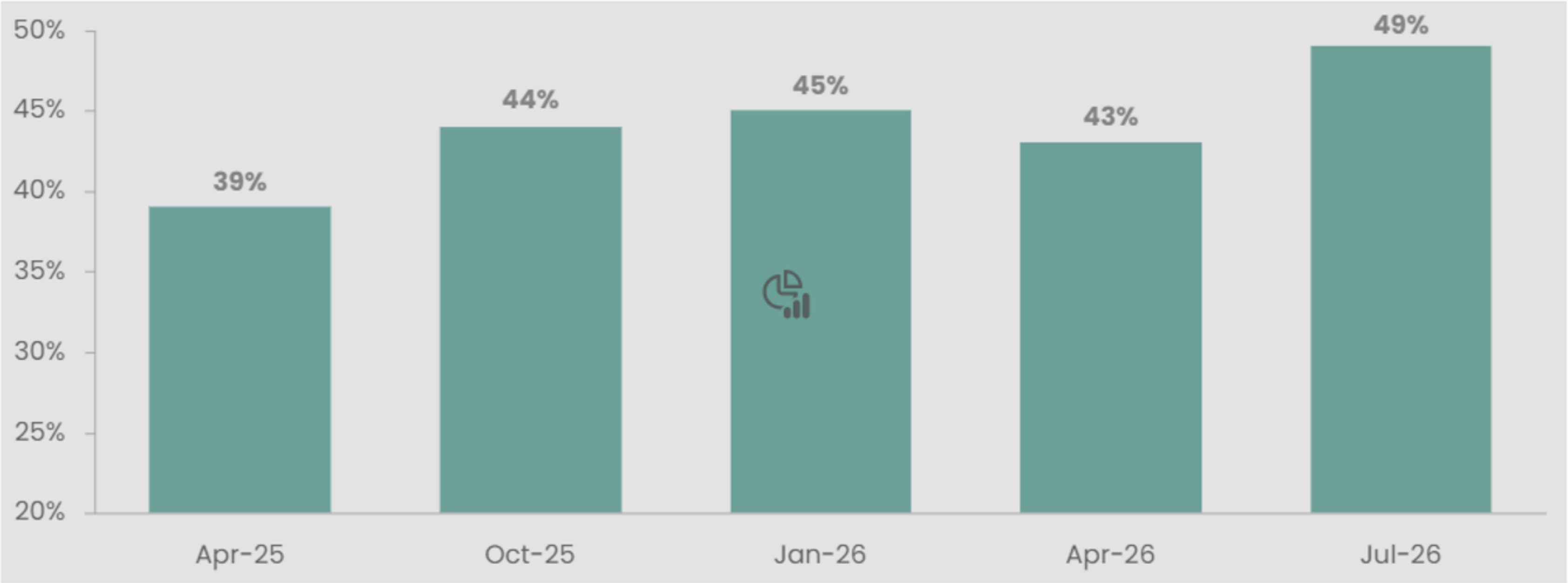


Source: Statistics Canada & Tourism Economics (August 2026)

Canadian Visitation Intent

Canadian intent to visit the US is rising

Percent of Canadian travelers intending to visit the US
Next 12 months; booked or planning

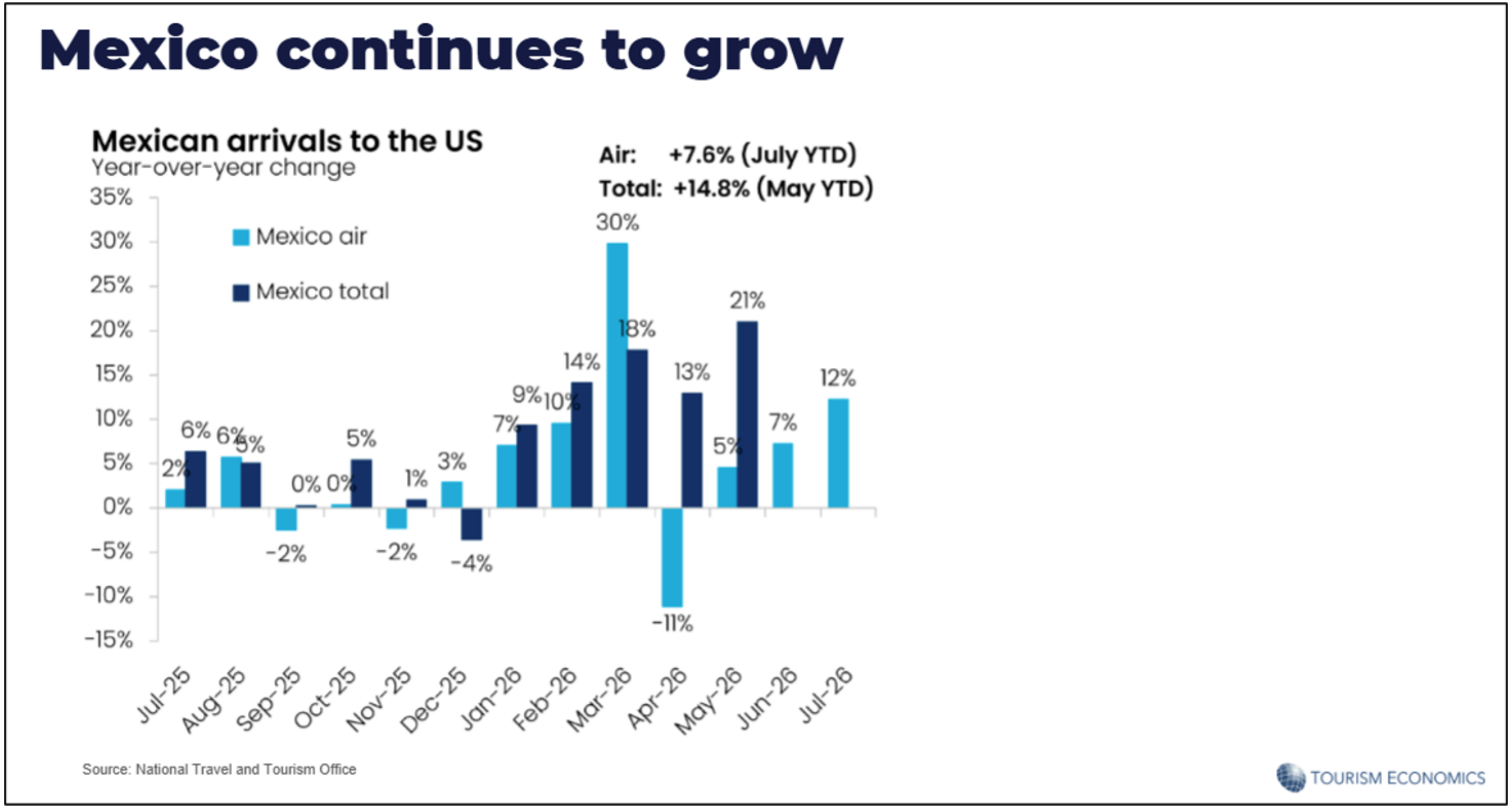


Source: Longwoods International, Canadian Travel Sentiment Study, July 2026 vs. previous waves

TOURISM ECONOMICS

Source: Longwoods International & Tourism Economics (August 2026)

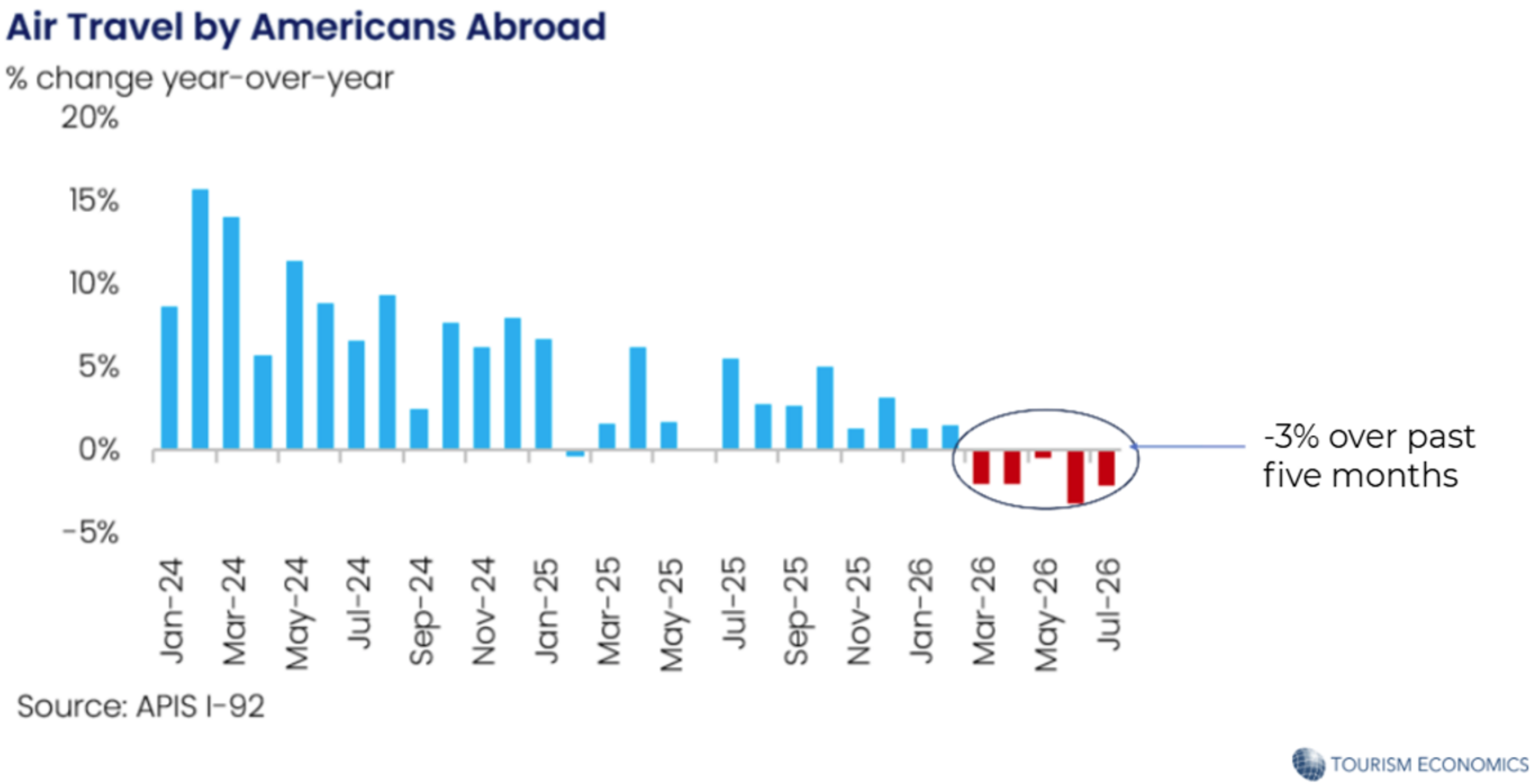
Mexican Visitation



Source: NTTO Canada & Tourism Economics (August 2026)

Outbound Travel Trends

And outbound travel is slipping



Source: Apis I-92 & Tourism Economics (August 2026)

Economic Review

U.S. Hotel Demand

- "CoStar and Tourism Economics made significant upward adjustments to the 2026-27 U.S. hotel forecast. For 2026, projected gains in average daily rate (ADR) and revenue per available room (RevPAR) were upgraded 1.1 ppts and 1.6 ppts, respectively. Occupancy was lifted to 63.1% – a 0.3 ppt lift from the previous forecast."
- "The hotel industry sold a record number of room nights in the first half of the year, an increase of 11.4 million compared with 2025, while room revenue climbed by more than $5.4 billion. The industry outperformed our expectations on stronger leisure and business travel, fueled in part by the World Cup and America 250 celebrations. In the next six months, we expect slightly lower gains than in the first half of the year, but top-line growth will still be driven by ADR."

TOURISM ECONOMICS
AN OXFORD ECONOMICS COMPANY

STR CoStar

U.S. Hotel Forecast

YoY – year over year (% change)

	2025 Actual	2026 Forecast	2027 Forecast
Supply (YoY)	+0.6%	+0.4%	+0.6%
Demand (YoY)	-0.6%	+1.7%	+1.1%
Occupancy	62.3%	63.1%	63.4%
ADR (YoY)	+1.0%	+3.1%	+1.6%
RevPAR (YoY)	-0.2%	+4.4%	+2.1%

Source: CoStar and Tourism Economics (8/6/2026)

U.S. Short Term Rentals Review

VISIT CENTRAL OREGON

Short Term Rentals Update July 2026

- "U.S. short-term rental performance strengthened in July, with RevPAR up 7.2% YoY, ADR up 6.9%, and occupancy up 0.3%."

- "The occupancy trend in 2026 has been one of accelerating growth, although with some starts and stops. The first seven months of 2026 saw nearly identical occupancy to 2025, with the year beginning slightly lower and ending July slightly higher (+0.3%)."
  - "On an aggregate year-to-date basis, 2026 occupancy is 0.3% lower than in the first seven months of 2025."

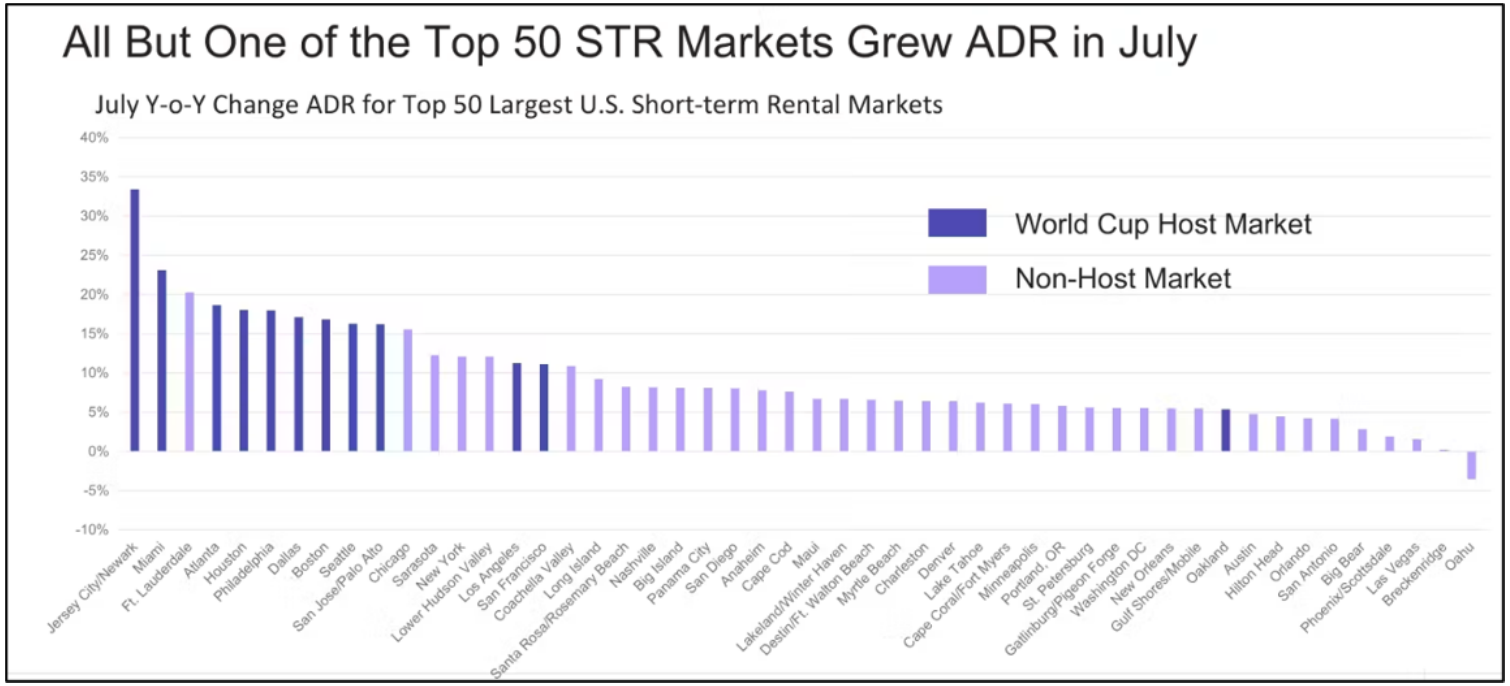
- "World Cup host cities continued to see strong pricing gains, but ADR growth broadened across the market, with 49 of the top 50 markets recording increases."
  - "Average daily rate growth had been tracing a zig-zag path around 2% in 2026, but saw sharp upturns in June (+3.9%) and July (+6.9%). In fact, July's growth rate was the fastest seen since August 2024."

Source: AirDNA (8/12/2026)

U.S. Short Term Rentals Review

Short Term Rentals Update
World Cup 2026

- “The increase in prices produced ADR growth in 49 of the top 50 markets, with 41 seeing growth of more than 5%. While almost all locations saw increasing ADR, the top spots were dominated by World Cup host and adjacent cities.”
- “The market serving the final match, the most expensive sporting event in history, Jersey City/Newark (+33.4%), had the highest ADR growth. Several host cities, including Philadelphia (+18.0%), Boston (+16.8%), and Seattle (+16.3%), continued to enjoy significant year-over-year boosts to ADR despite hosting only a single game in July.”



Source: AirDNA (8/12/2026)

U.S. Short Term Rentals Review

VISIT CENTRAL OREGON

Short Term Rentals Update July 2026 (continued)

- “According to pacing data, which compares current on-the-books reservations with those made by the same time the previous year, the rest of 2026 looks bright from a demand standpoint, with five straight months pacing more than 15% ahead after a relatively weak August.”
  - “However, two data issues add nuance to the picture. The first is a calendar shift that moved Labor Day weekend from August to September, artificially deflating August’s demand while boosting September’s. This may account for as much as 5-8% of September’s demand.”
  - “The other factor is lead time, or how many days before a reservation guests book their listings. Lead times had been consistently declining for several years until they increased in October and November 2025. After that, there were a few more months of decline before four months of either longer or constant lead times.”

Key U.S. Short Term Rental Performance Metrics for July 2026

- Available listings reached 1.75 million, a 2.6% increase YoY
- Demand nights were up 2.0%
- Occupancy averaged 68.4%, up 0.3% YoY
- Average Daily Rates (ADR) climbed to $317.55, up 6.9% from last year
- Revenue per Available Rental (RevPAR) increased 7.2% year-over-year (YoY) to $217.17

Source: AirDNA (8/12/2026)

Smith Travel Research Hotel Performance

STR - Definitions

- **Average Daily Rate (ADR)** – A measure of the average rate paid for rooms sold, calculated by dividing room revenue by rooms sold.
  - ADR = Room Revenue / Rooms Sold
- **Demand (Rooms Sold)** – The number of rooms sold in a specified period (excludes complimentary rooms).
- **Supply (Rooms Available)** – The number of rooms in a hotel or set of hotels multiplied by the number of days in a specified period.
- **Occupancy** – Percentage of available rooms sold during a specified period. Occupancy is calculated by dividing the number of rooms sold by rooms available.
  - Occupancy = Rooms Sold / Rooms Available
- **Room Revenue** – Total room revenue generated from the guestroom rentals or sales.
- **Revenue Per Available Room (RevPAR)** – Total room revenue divided by the total number of available rooms.
  - RevPAR = Room Revenue / Rooms Available

Source: STR

MONTHLY RESEARCH REPORT

TRAVEL OREGON MONTHLY LODGING STATISTICS

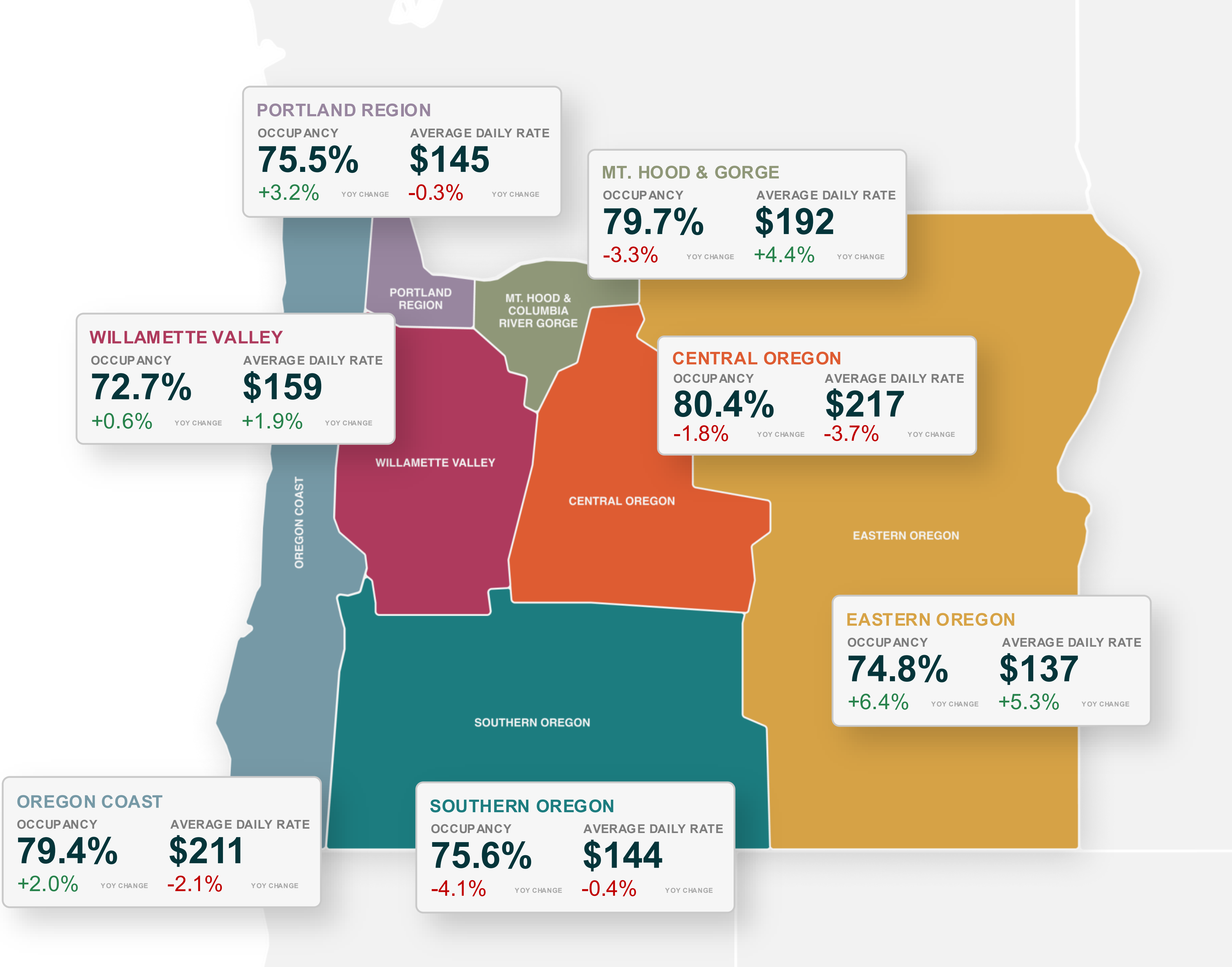
JULY 2026

UNITED STATES

- Occupancy: 69.9% (+2.1% YOY)
- ADR: $170 (+5.3% YOY)

OREGON STATEWIDE

- Occupancy: 76.2% (+0.7% YOY)
- ADR: $166 (-0.3% YOY)



Source: STR & Travel Oregon

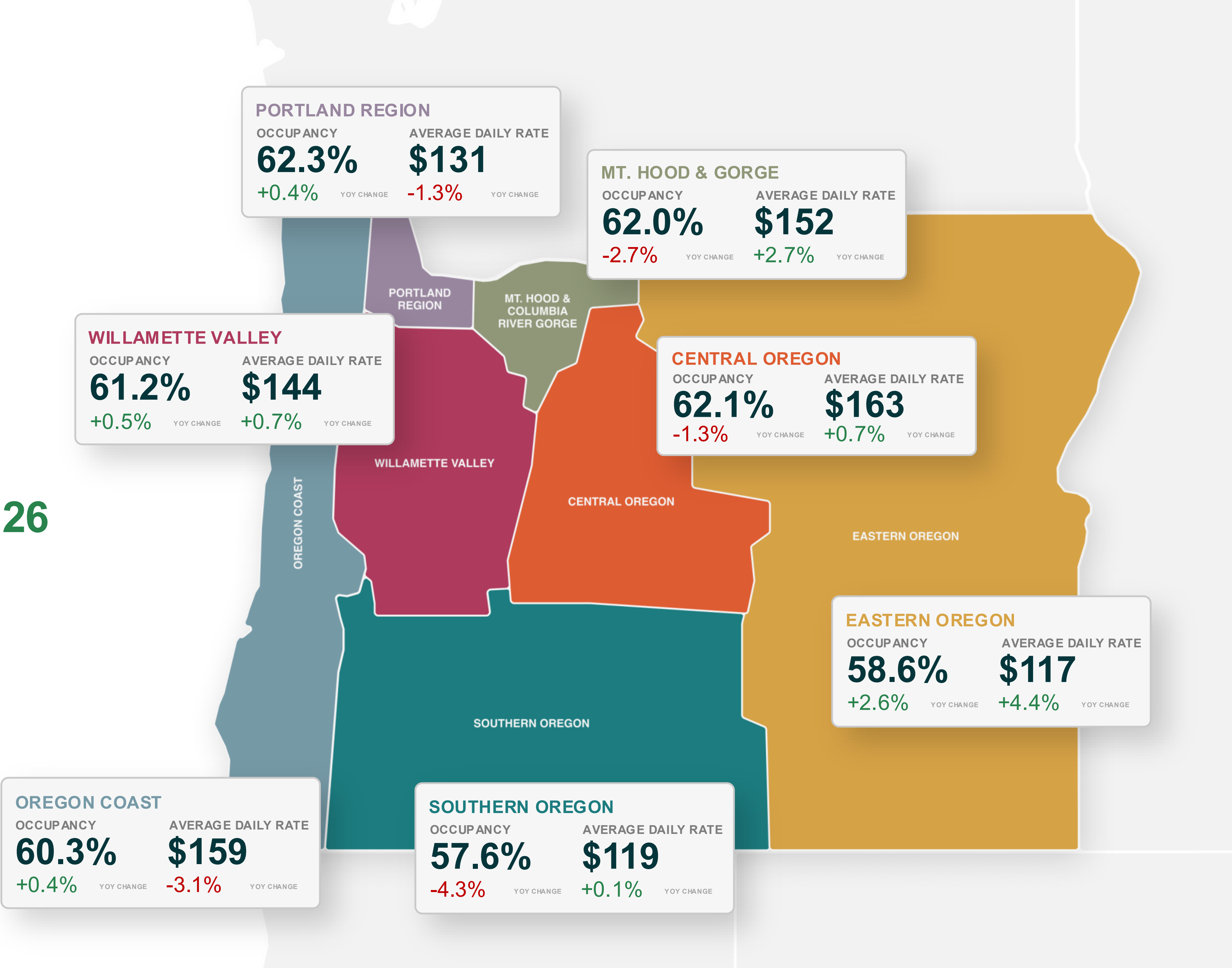
MONTHLY RESEARCH REPORT

TRAVEL OREGON MONTHLY LODGING STATISTICS

CALENDAR YEAR 2026
(JANUARY-JULY 2026)

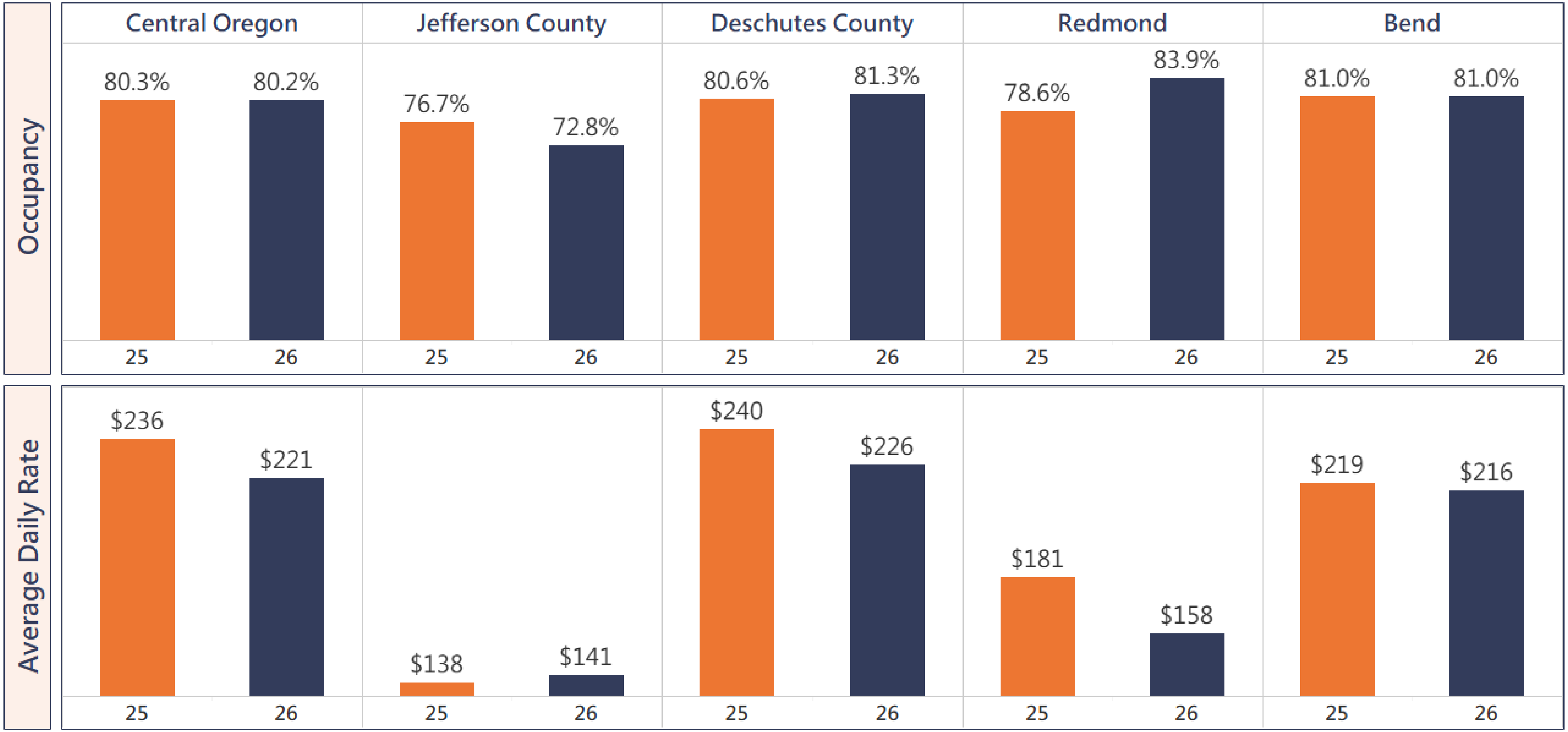
UNITED STATES
- Occupancy: 64.5% (+1.8% YOY)
- ADR: $165 (+3.5% YOY)

OREGON STATEWIDE
- Occupancy: 61.1% (-0.8% YOY)
- ADR: $140 (-0.7% YOY)



Source: STR & Travel Oregon

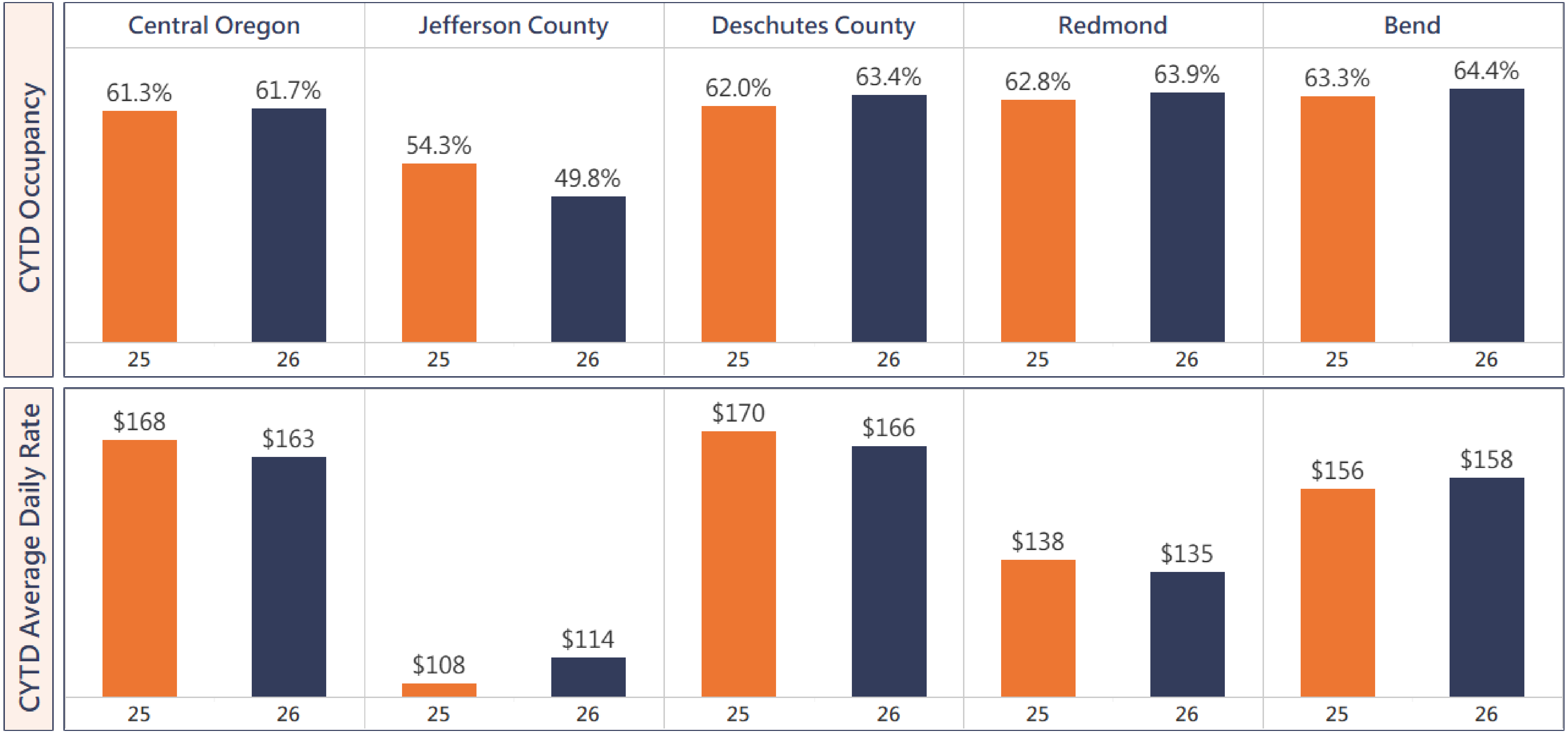
Regional Summary – July 2026



Source: STR

Note: Crook County does not have a large enough sample size to report

Regional Summary – CYTD 2026



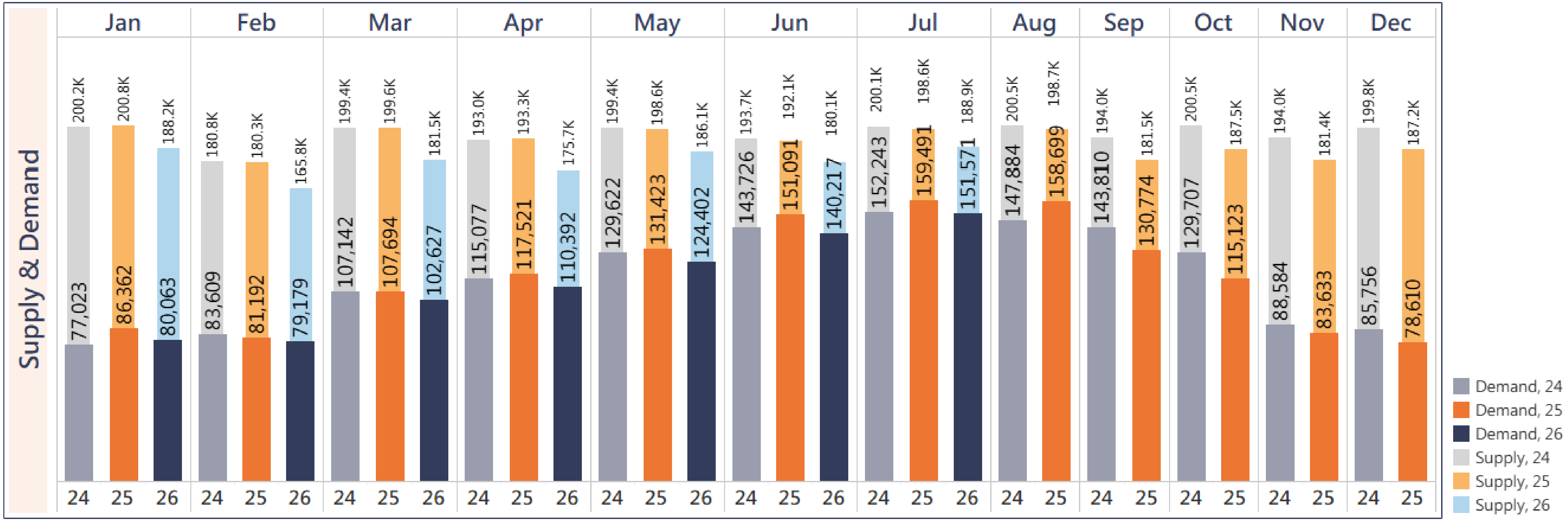
Source: STR

Note: Crook County does not have a large enough sample size to report


Central Oregon
Region

Central Oregon – July 2026

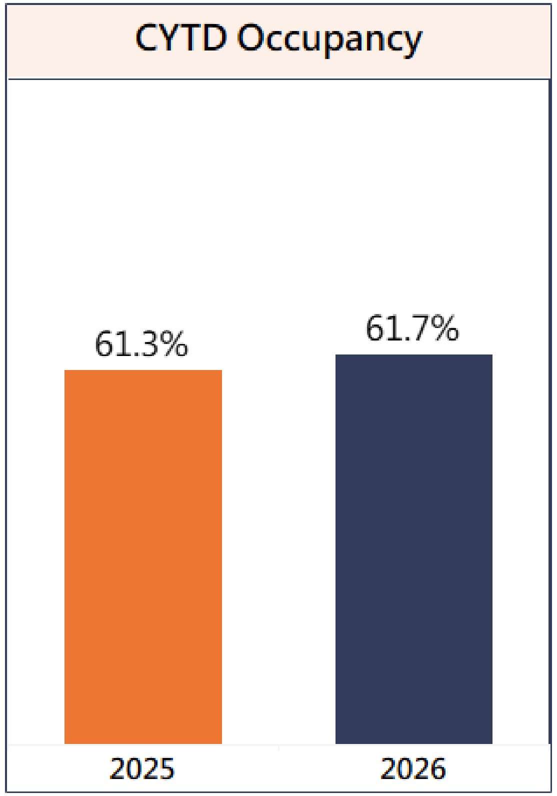
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Jul '26	80.2%	$220.52	$176.93	188,914	151,571	$33,423,875
YOY	-0.1%	-6.7%	-6.9%	-4.9%	-5.0%	-11.4%

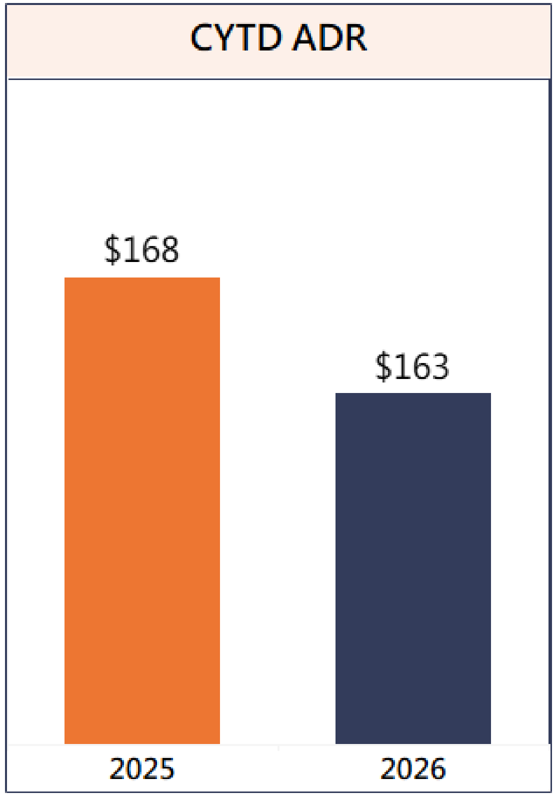


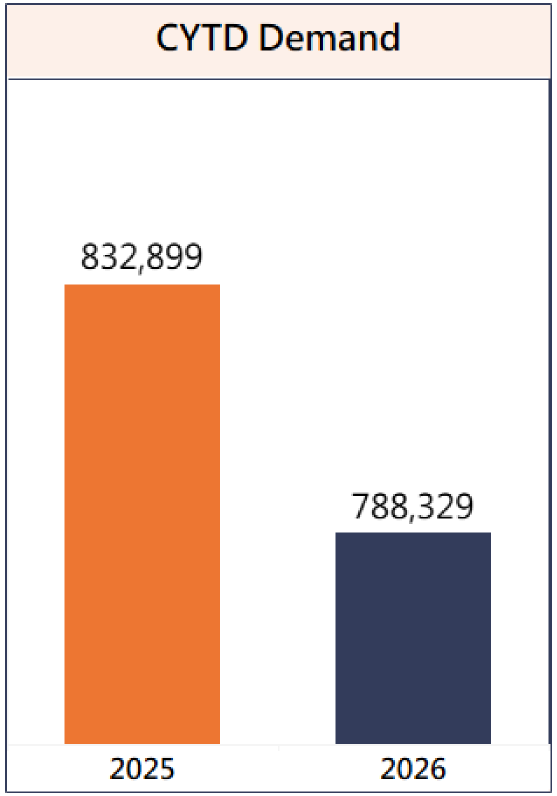
Source: STR

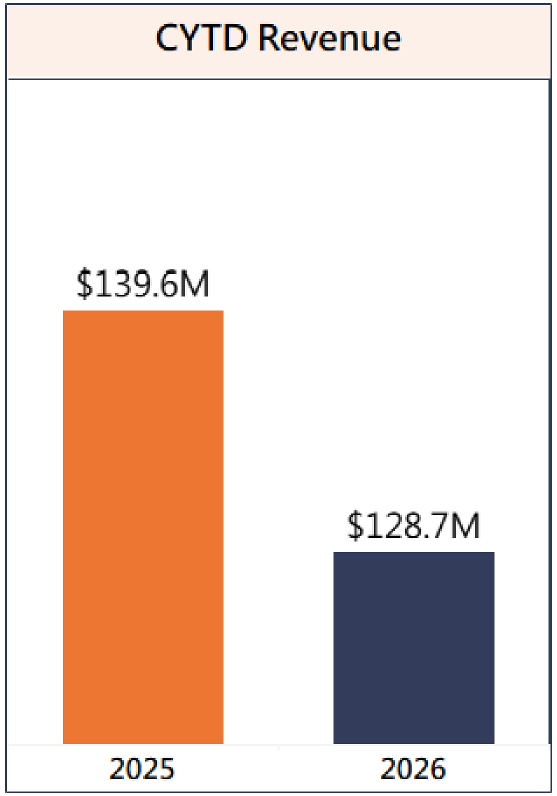
Central Oregon – CYTD 2026

	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
CYTD '26	61.7%	$163.24	$100.76	1,277,180	788,329	$128,683,399
YOY	0.7%	-2.6%	-1.9%	-6.0%	-5.4%	-7.8%



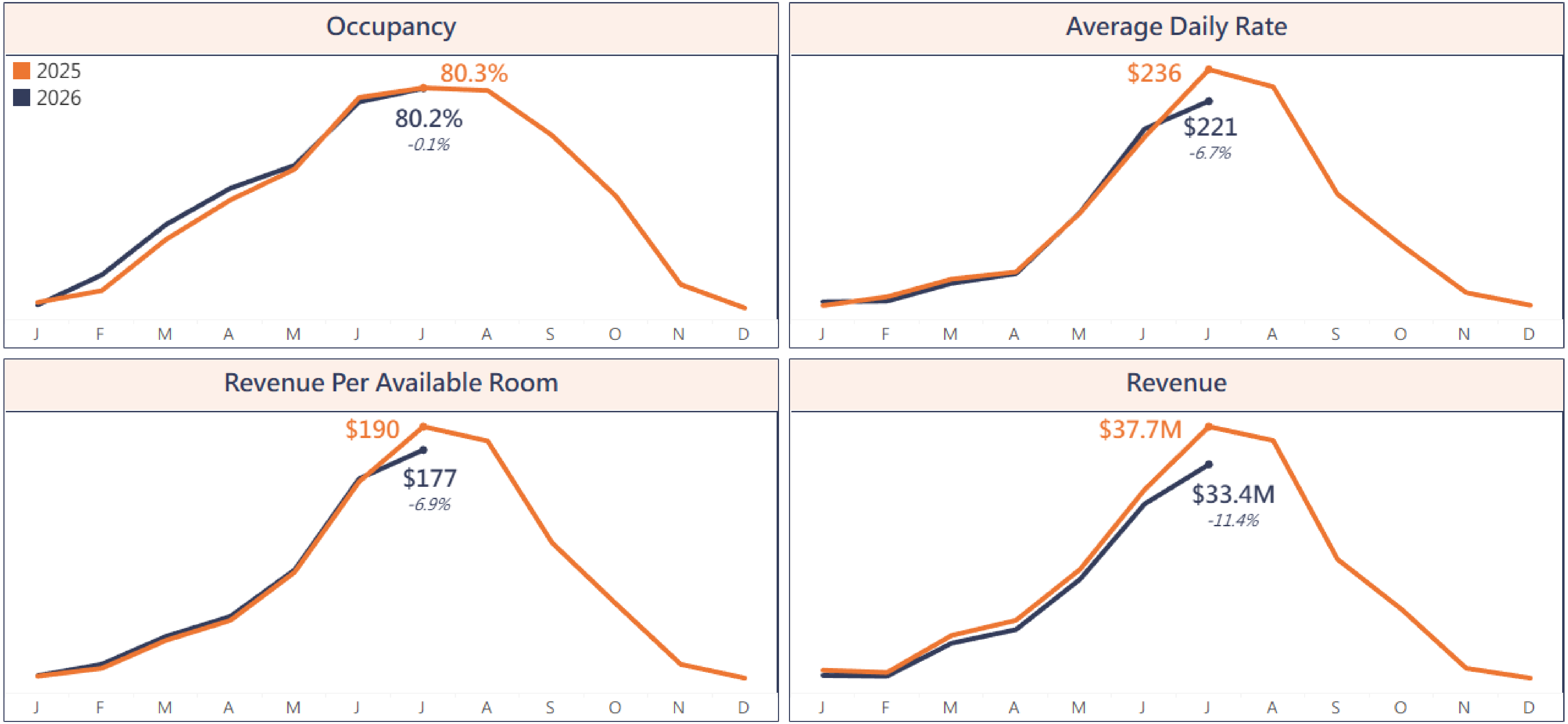






Source: STR

Central Oregon – July 2026



Source: STR

Central Oregon – July 2026

VISIT CENTRAL OREGON

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1 Occ 70.4% ADR $181 Demand 4,228	2 Occ 68.2% ADR $192 Demand 4,092	3 Occ 79.2% ADR $234 Demand 4,755	4 Occ 79.3% ADR $240 Demand 4,759
5 Occ 60.7% ADR $185 Demand 3,646	6 Occ 72.1% ADR $185 Demand 4,330	7 Occ 78.6% ADR $189 Demand 4,718	8 Occ 81.9% ADR $208 Demand 4,915	9 Occ 83.5% ADR $218 Demand 5,009	10 Occ 90.8% ADR $285 Demand 5,451	11 Occ 92.6% ADR $285 Demand 5,556
12 Occ 69.1% ADR $203 Demand 4,150	13 Occ 76.8% ADR $195 Demand 4,612	14 Occ 80.6% ADR $198 Demand 4,835	15 Occ 84.2% ADR $203 Demand 5,051	16 Occ 80.7% ADR $213 Demand 4,846	17 Occ 86.0% ADR $257 Demand 5,164	18 Occ 88.5% ADR $257 Demand 5,313
19 Occ 70.0% ADR $197 Demand 4,296	20 Occ 78.9% ADR $198 Demand 4,838	21 Occ 85.8% ADR $210 Demand 5,263	22 Occ 90.4% ADR $223 Demand 5,547	23 Occ 89.7% ADR $234 Demand 5,503	24 Occ 93.4% ADR $288 Demand 5,730	25 Occ 94.3% ADR $288 Demand 5,782
26 Occ 76.0% ADR $206 Demand 4,663	27 Occ 81.6% ADR $201 Demand 5,004	28 Occ 85.6% ADR $203 Demand 5,251	29 Occ 87.5% ADR $207 Demand 5,369	30 Occ 84.3% ADR $201 Demand 5,173	31 Occ 88.4% ADR $239 Demand 5,421	

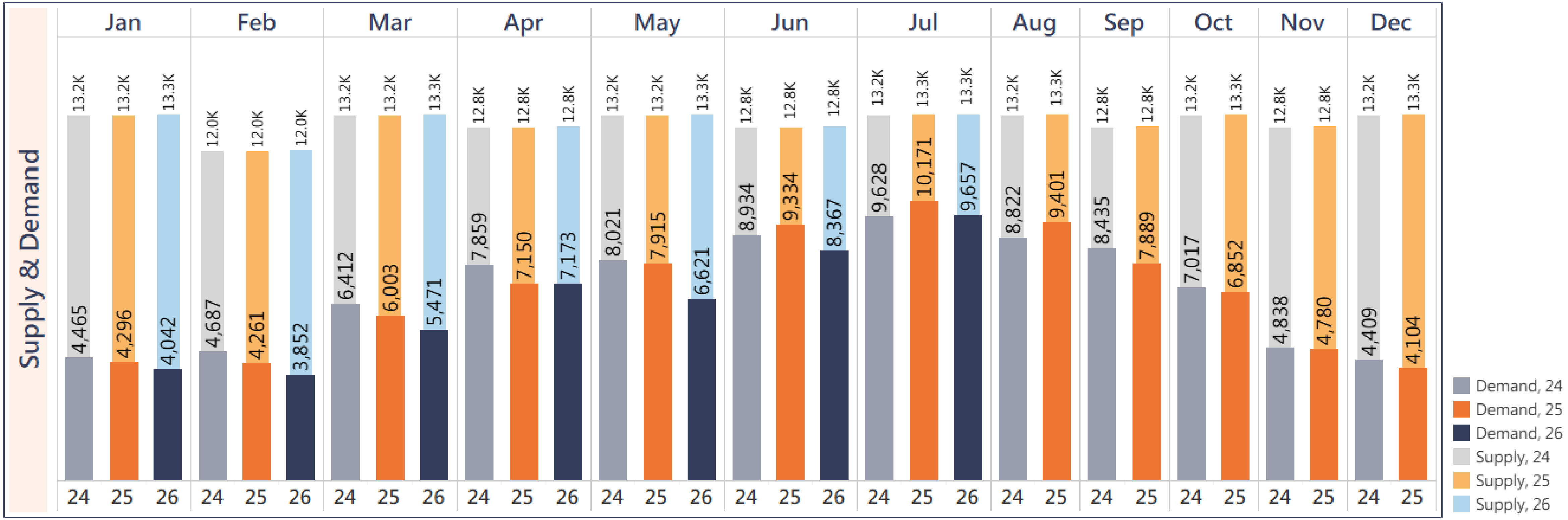
Source: STR

Jefferson County

Jefferson County – July 2026

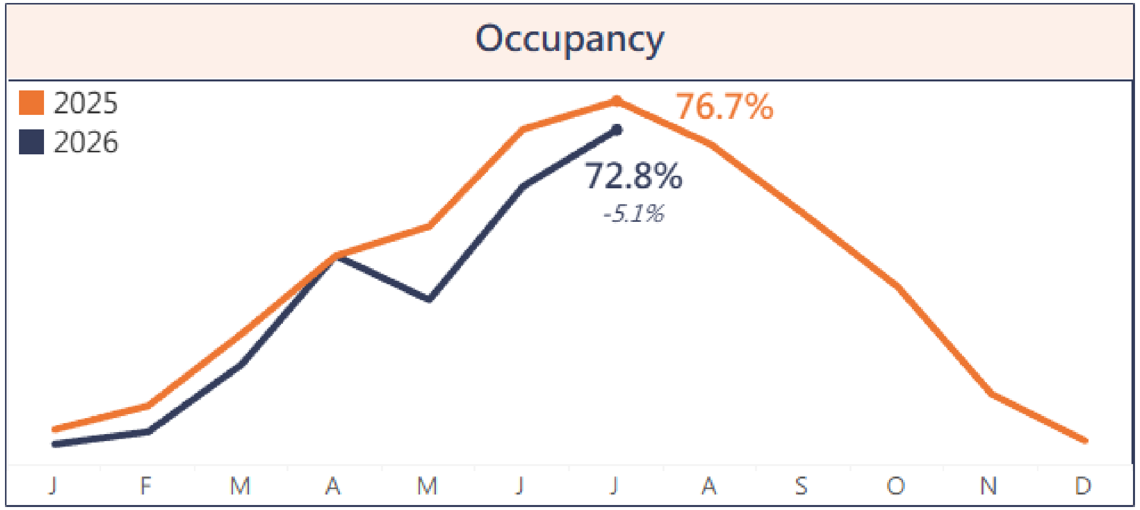
VISIT CENTRAL OREGON

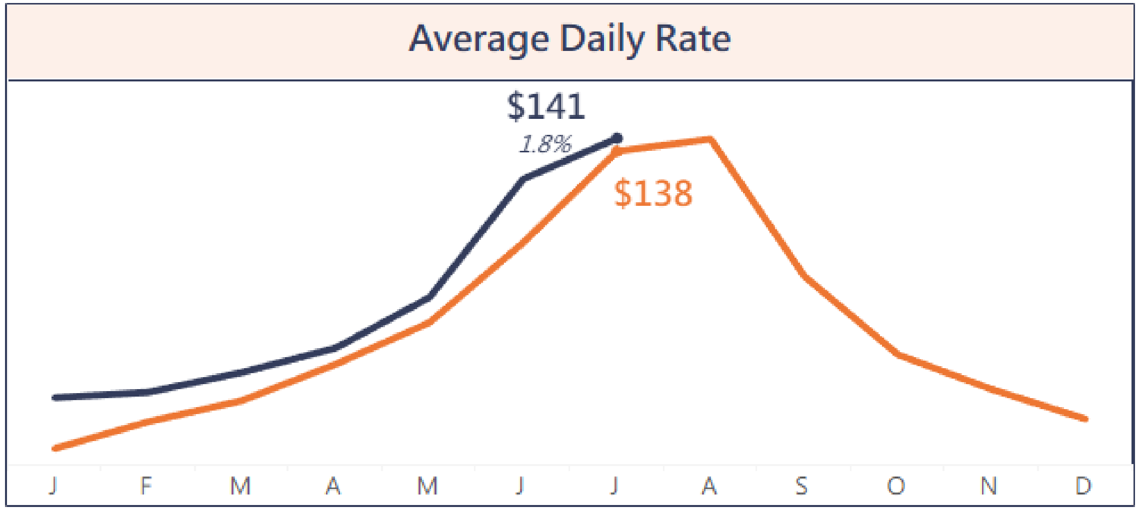
YOY Jul '26	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Jul '26	72.8%	$140.69	$102.40	13,268	9,657	$1,358,664
YOY	-5.1%	1.8%	-3.3%	0.0%	-5.1%	-3.3%

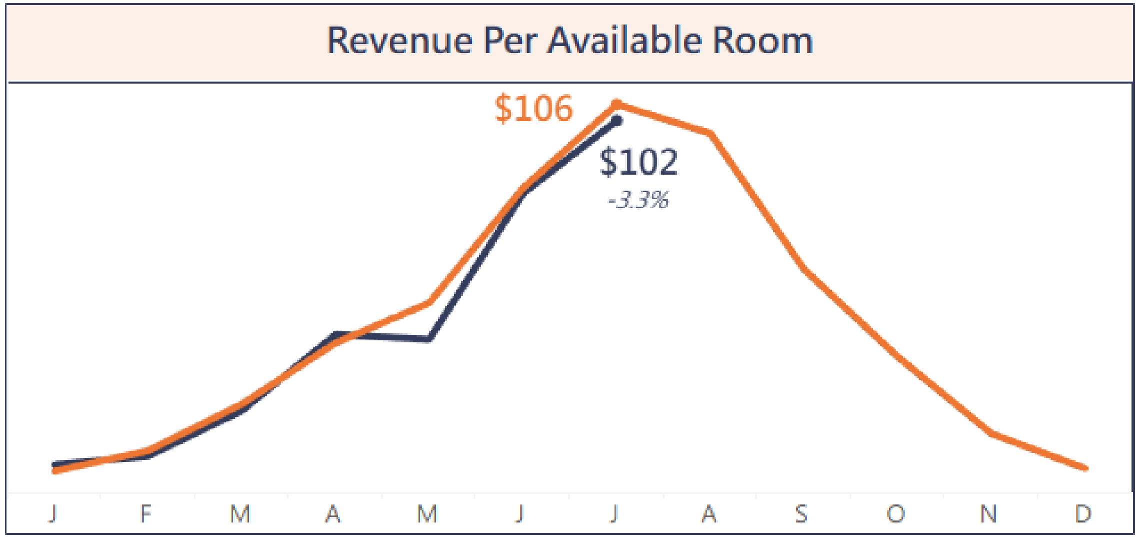


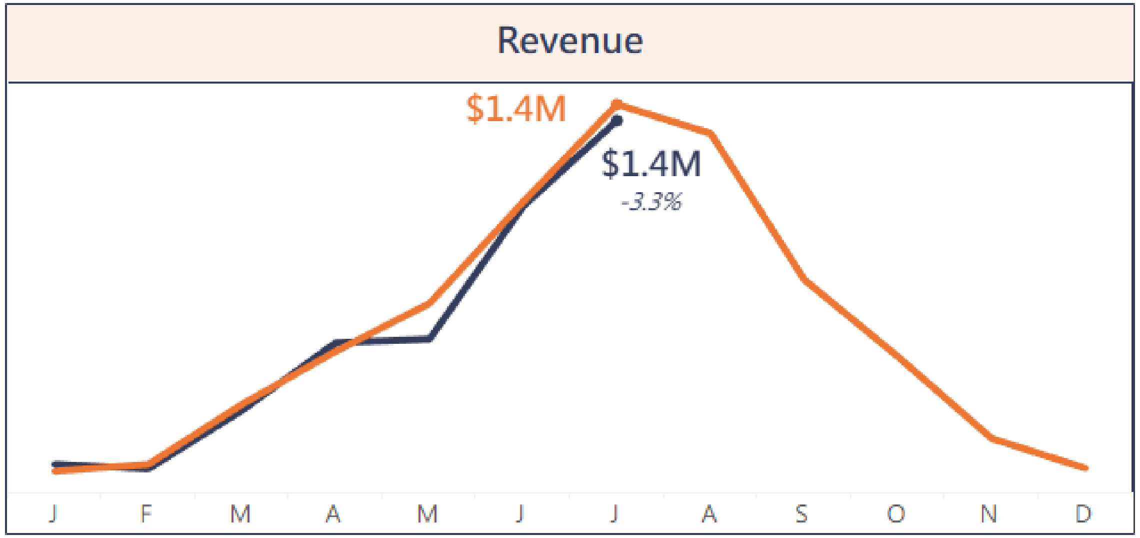
Source: STR

Jefferson County – July 2026







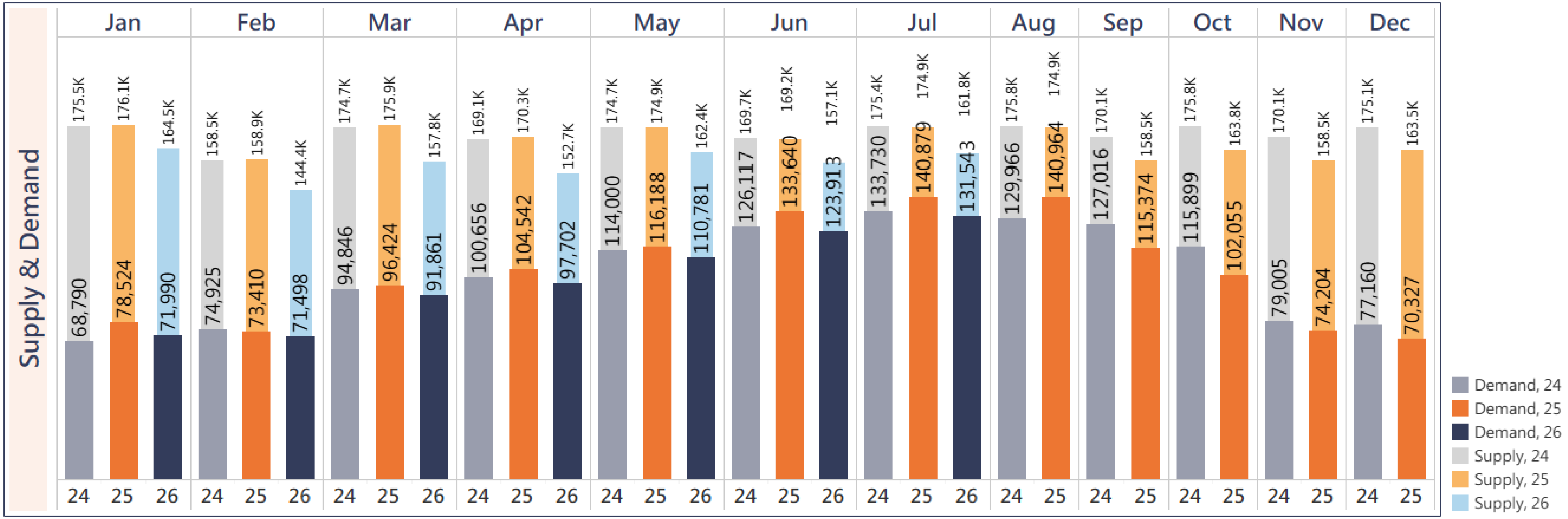


Source: STR

Deschutes County

Deschutes County – July 2026

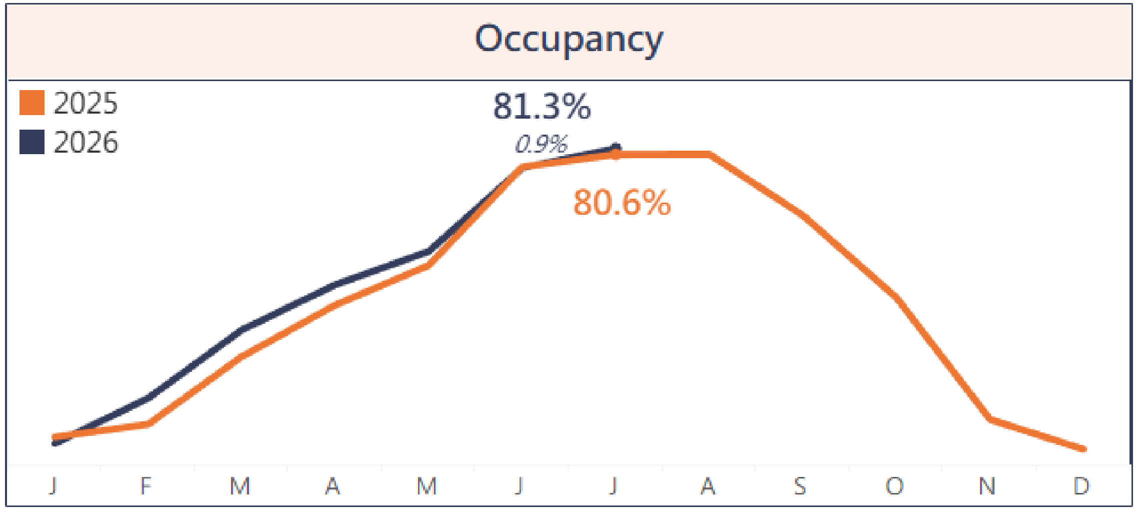
	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
Jul '26	81.3%	$225.77	$183.60	161,758	131,543	$29,698,392
YOY	0.9%	-6.0%	-5.1%	-7.5%	-6.6%	-12.2%

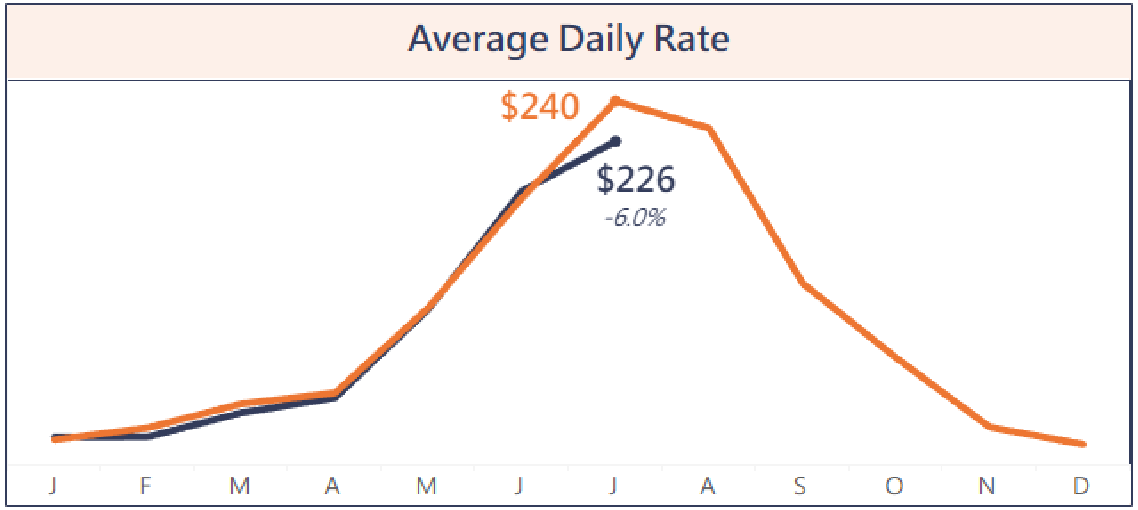


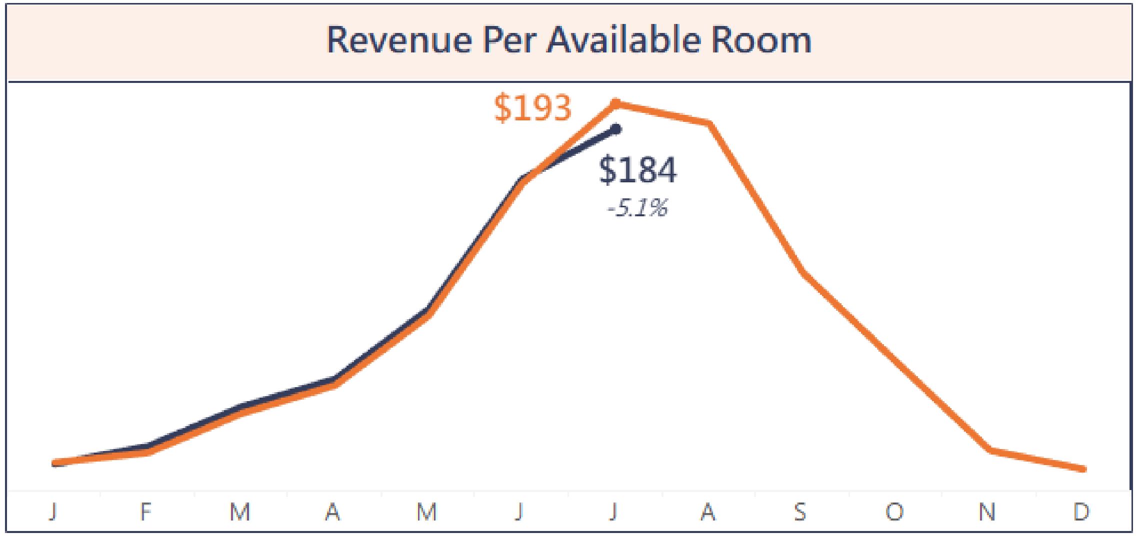
Source: STR

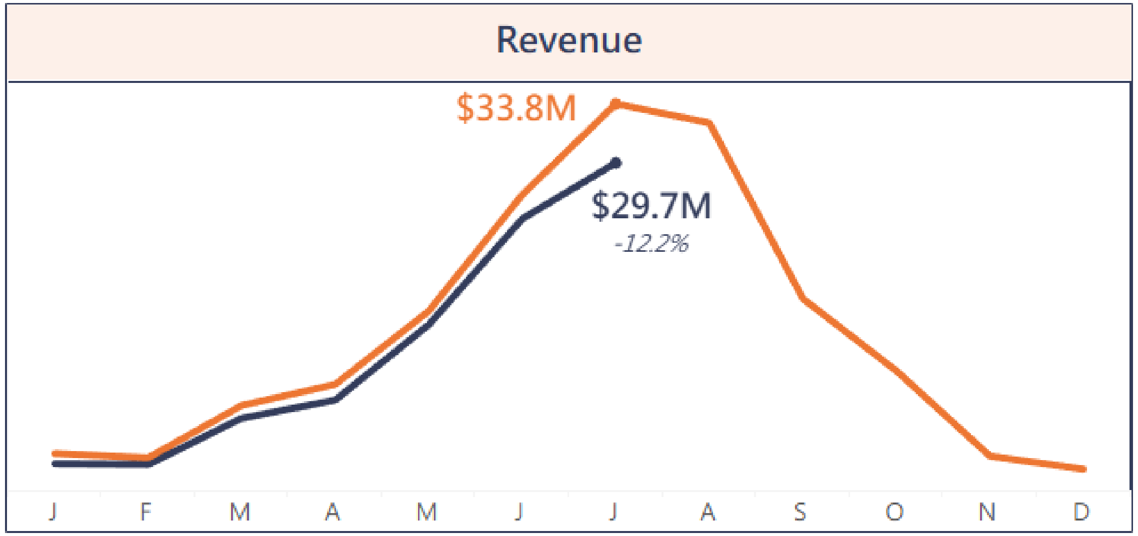
Deschutes County – July 2026

VISIT CENTRAL OREGON









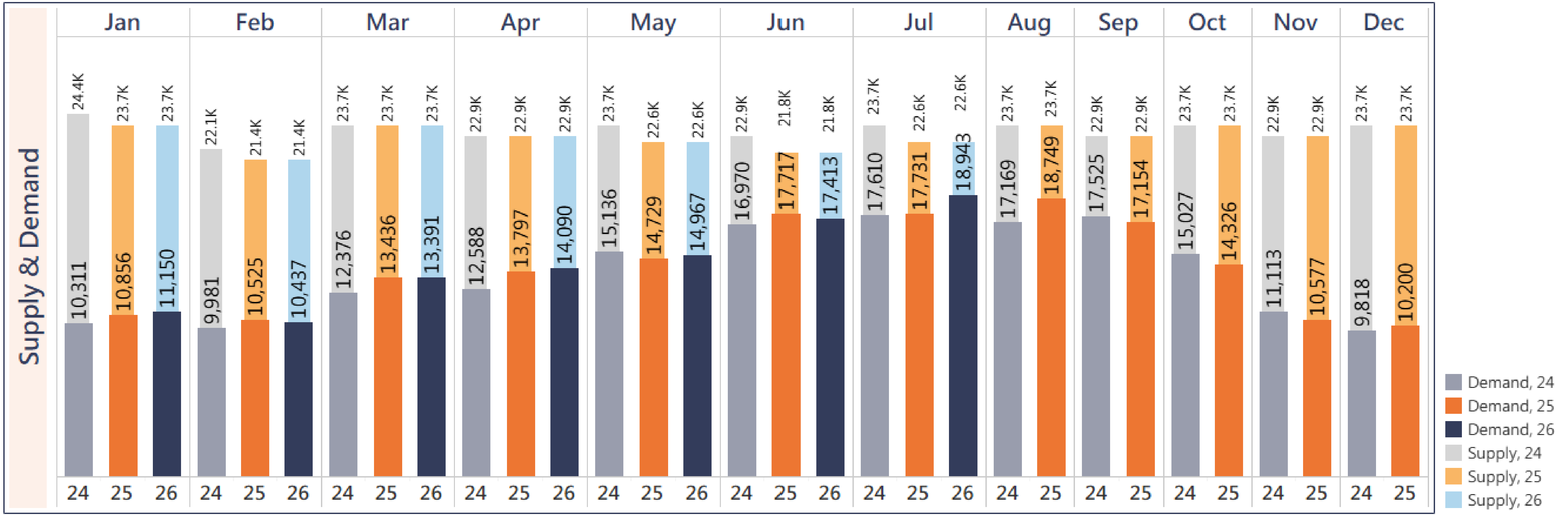
Source: STR


Redmond

Redmond – July 2026

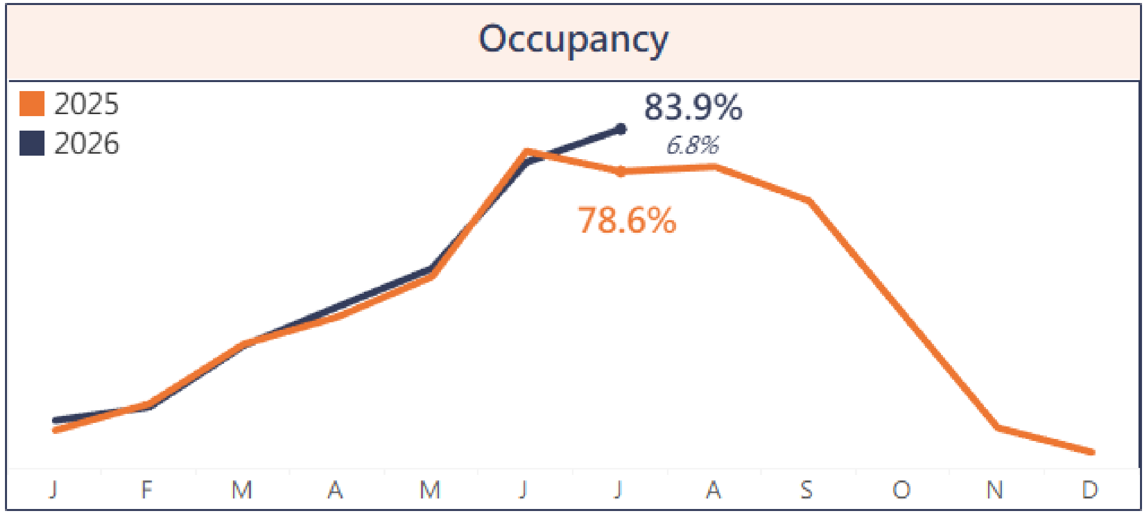
VISIT CENTRAL OREGON

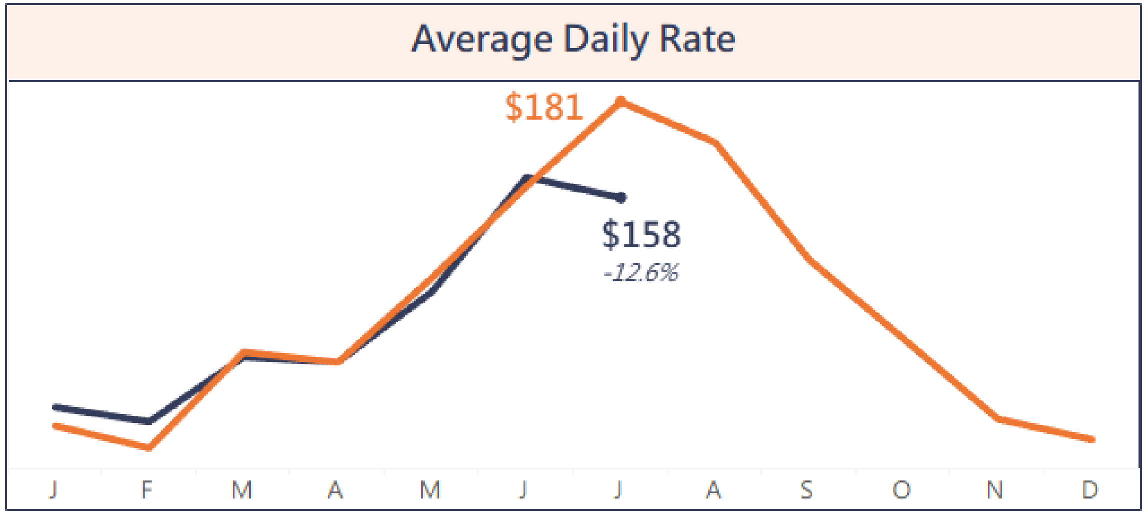
Jul '26	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
	83.9%	$157.88	$132.52	22,568	18,943	$2,990,771
YOY	6.8%	-12.6%	-6.6%	0.0%	6.8%	-6.6%

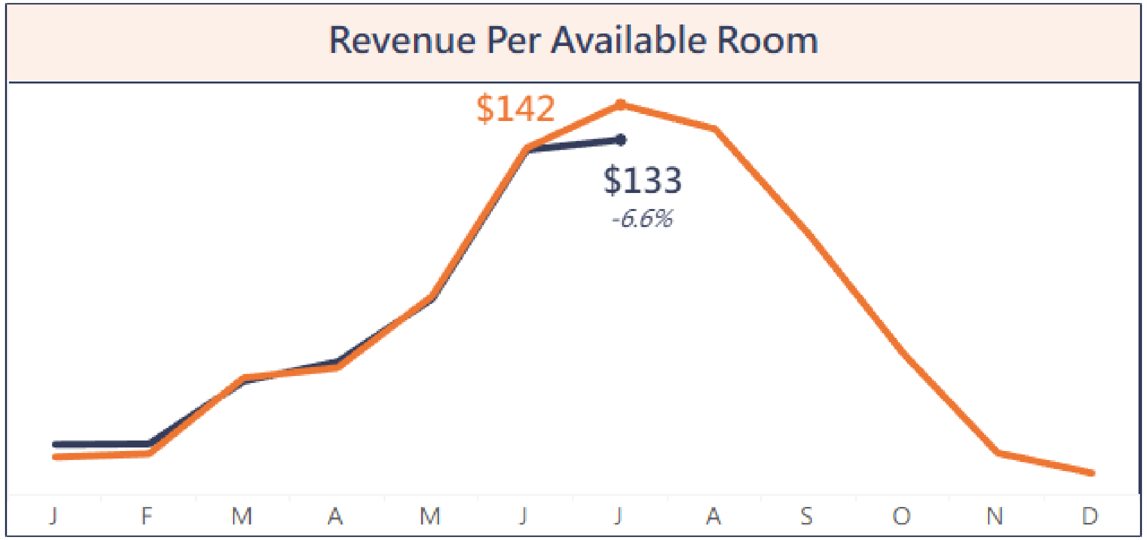


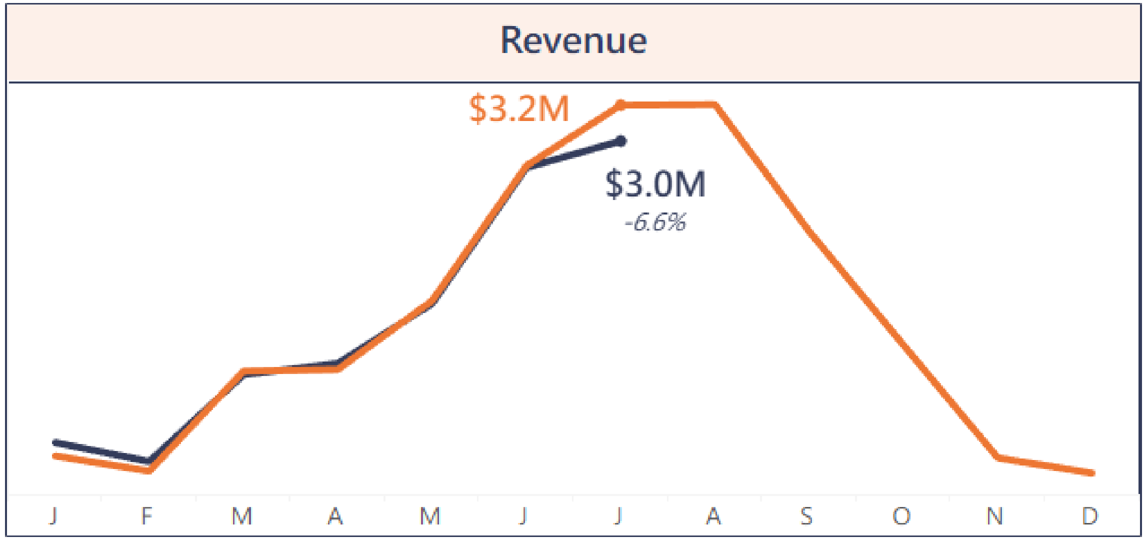
Source: STR

Redmond – July 2026







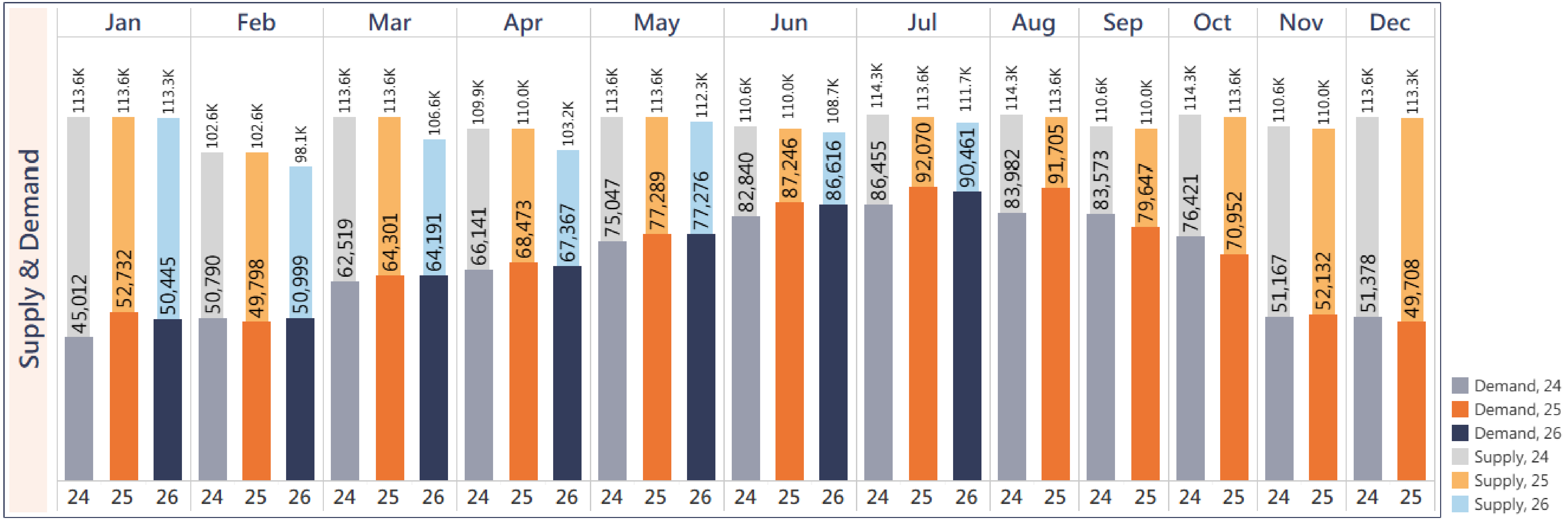


Source: STR


Bend

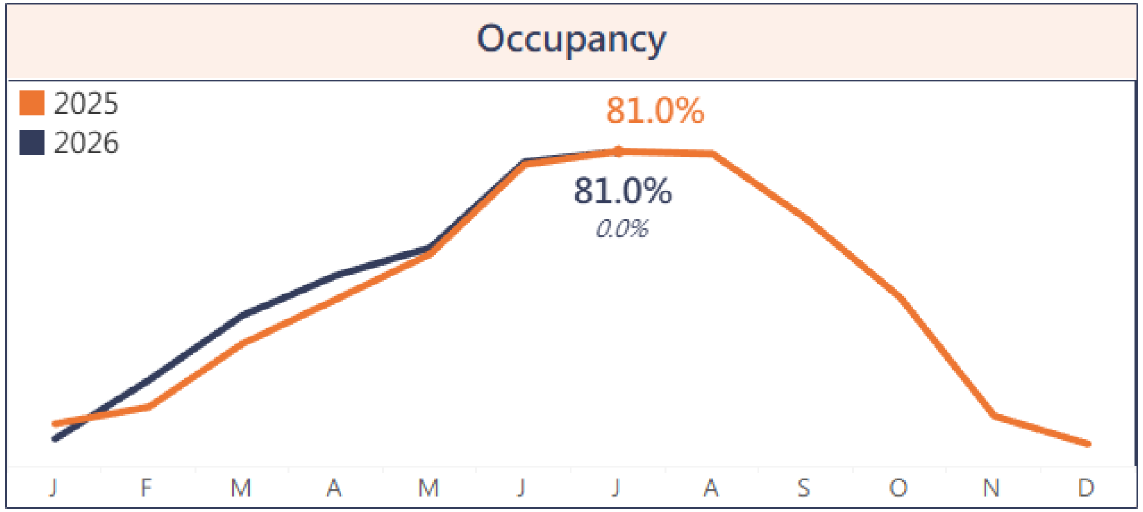
Bend – July 2026

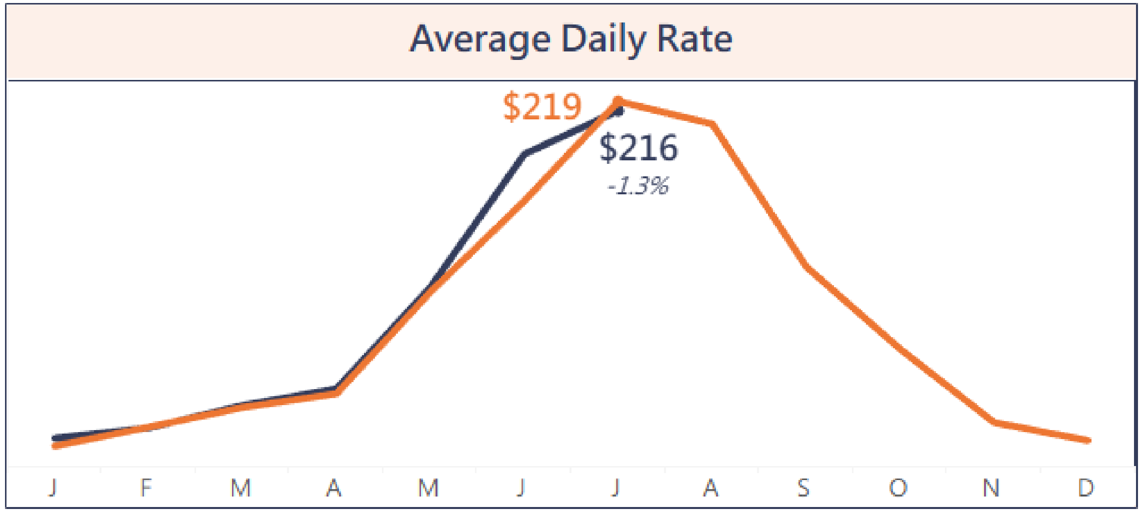
Jul '26	Occupancy	ADR	RevPAR	Supply	Demand	Revenue
	81.0%	$215.60	$174.67	111,662	90,461	$19,503,679
YOY	0.0%	-1.3%	-1.4%	-1.7%	-1.7%	-3.1%

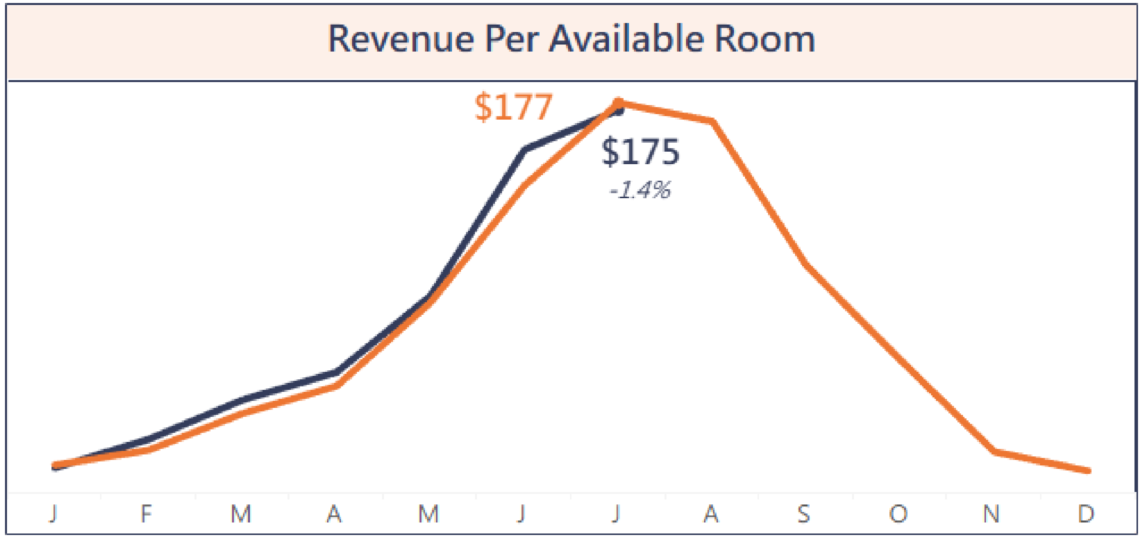


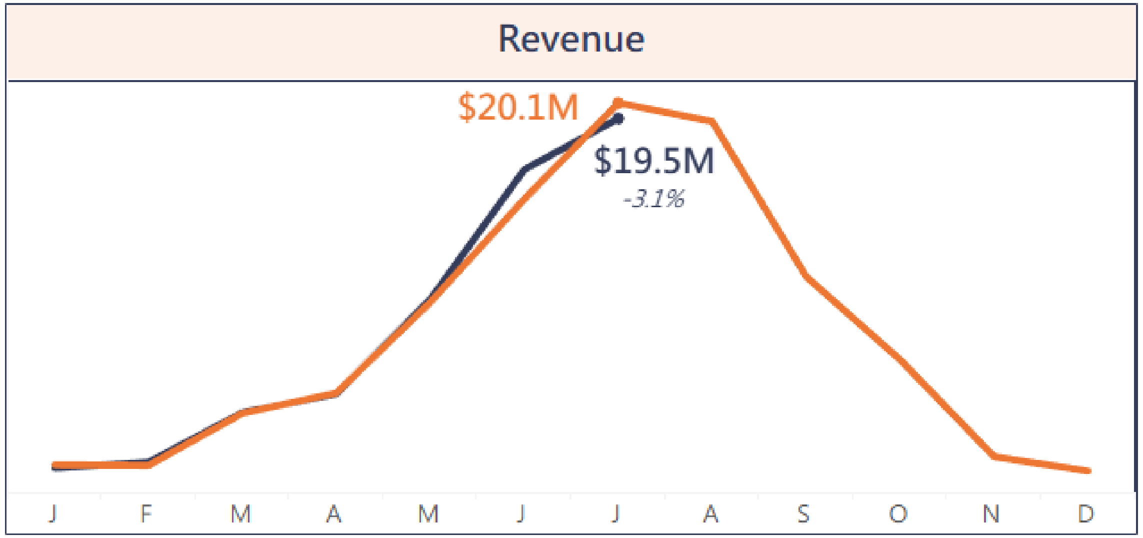
Source: STR

Bend – July 2026









Source: STR

Bend – July 2026

VISIT CENTRAL OREGON

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
			1 Occ 72.9% ADR $165 Demand 2,641	2 Occ 69.1% ADR $173 Demand 2,501	3 Occ 82.2% ADR $216 Demand 2,979	4 Occ 81.7% ADR $220 Demand 2,958
5 Occ 61.7% ADR $166 Demand 2,234	6 Occ 73.3% ADR $173 Demand 2,654	7 Occ 80.2% ADR $178 Demand 2,906	8 Occ 85.1% ADR $208 Demand 3,081	9 Occ 85.7% ADR $215 Demand 3,103	10 Occ 91.4% ADR $292 Demand 3,312	11 Occ 93.9% ADR $291 Demand 3,402
12 Occ 69.9% ADR $194 Demand 2,530	13 Occ 76.8% ADR $185 Demand 2,780	14 Occ 83.1% ADR $191 Demand 3,010	15 Occ 86.2% ADR $199 Demand 3,123	16 Occ 82.6% ADR $210 Demand 2,993	17 Occ 84.3% ADR $260 Demand 3,052	18 Occ 88.1% ADR $261 Demand 3,192
19 Occ 68.7% ADR $182 Demand 2,579	20 Occ 77.7% ADR $184 Demand 2,916	21 Occ 86.3% ADR $202 Demand 3,239	22 Occ 91.3% ADR $231 Demand 3,425	23 Occ 89.8% ADR $233 Demand 3,372	24 Occ 93.4% ADR $297 Demand 3,505	25 Occ 94.1% ADR $295 Demand 3,531
26 Occ 77.0% ADR $205 Demand 2,890	27 Occ 81.3% ADR $183 Demand 3,051	28 Occ 86.2% ADR $184 Demand 3,234	29 Occ 87.3% ADR $193 Demand 3,276	30 Occ 84.0% ADR $188 Demand 3,154	31 Occ 88.5% ADR $235 Demand 3,322	

Source: STR

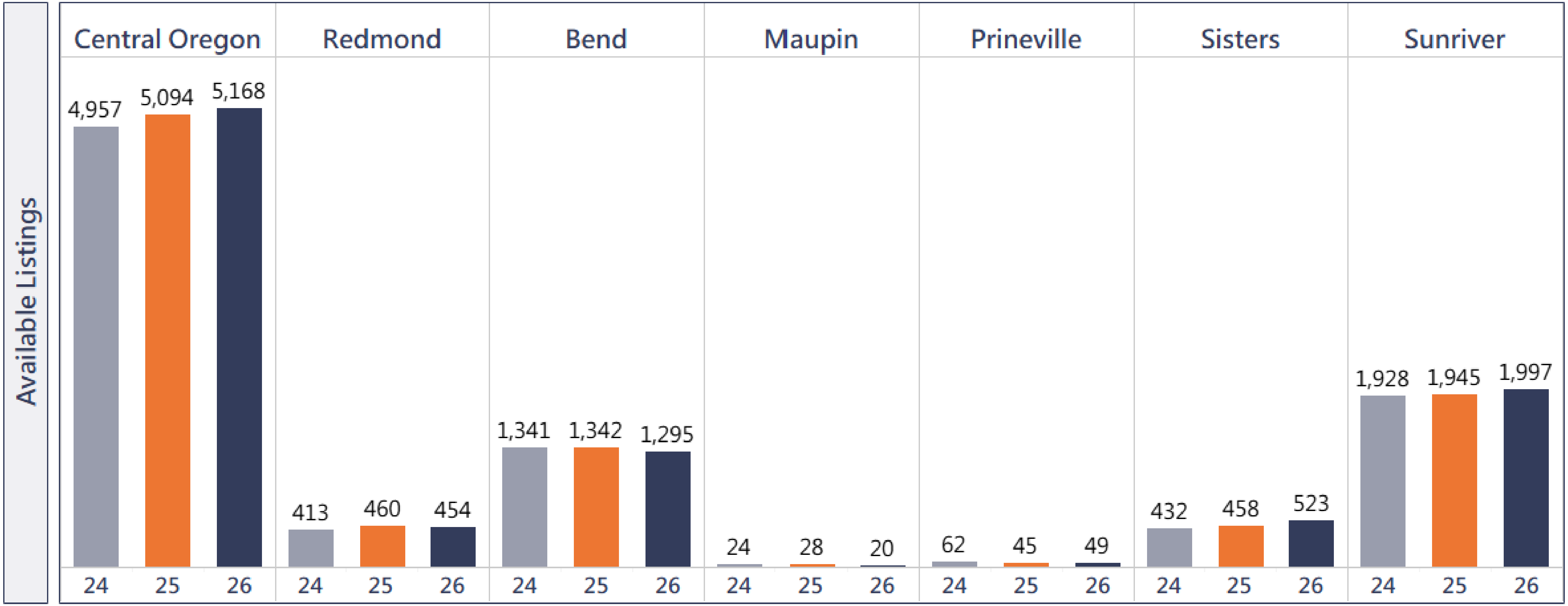
Airbnb & Vrbo Short Term Rental Performance

AirDNA - Definitions

- **Available Listings** – Total number of listings whose calendars had at least one day classified as available or reserved during the reporting period.
- **Average Daily Rate** – Average daily rate (ADR) of booked nights in USD (ADR = Total Revenue / Booked Nights).
- **Demand (Nights Booked)** – Total number of nights booked during the reporting period.
- **Supply (Nights Available)** – Total number of nights available during the reporting period.
- **Occupancy Rate** – Occupancy Rate = Total Booked Days / (Total Booked Days + Total Available Days). The calculation only includes vacation rentals with at least one Booked Night.
- **Revenue (USD)** – Total revenue (in US dollars) earned during the reporting period. Includes the advertised price from the time of booking, as well as cleaning fees.
- **RevPAR** – Revenue Per Available Rental = ADR * Occupancy Rate

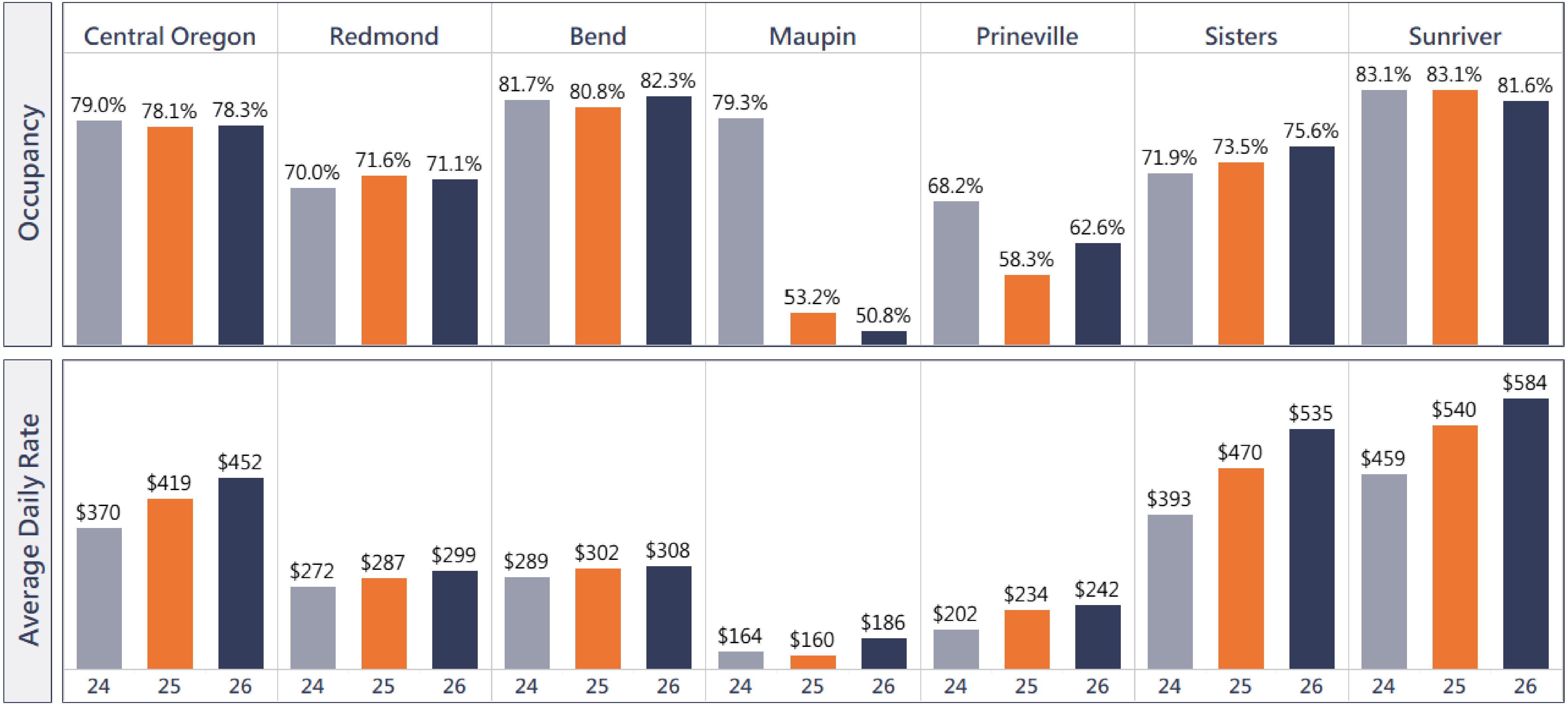
Source: AirDNA

July 2026 Regional Summary



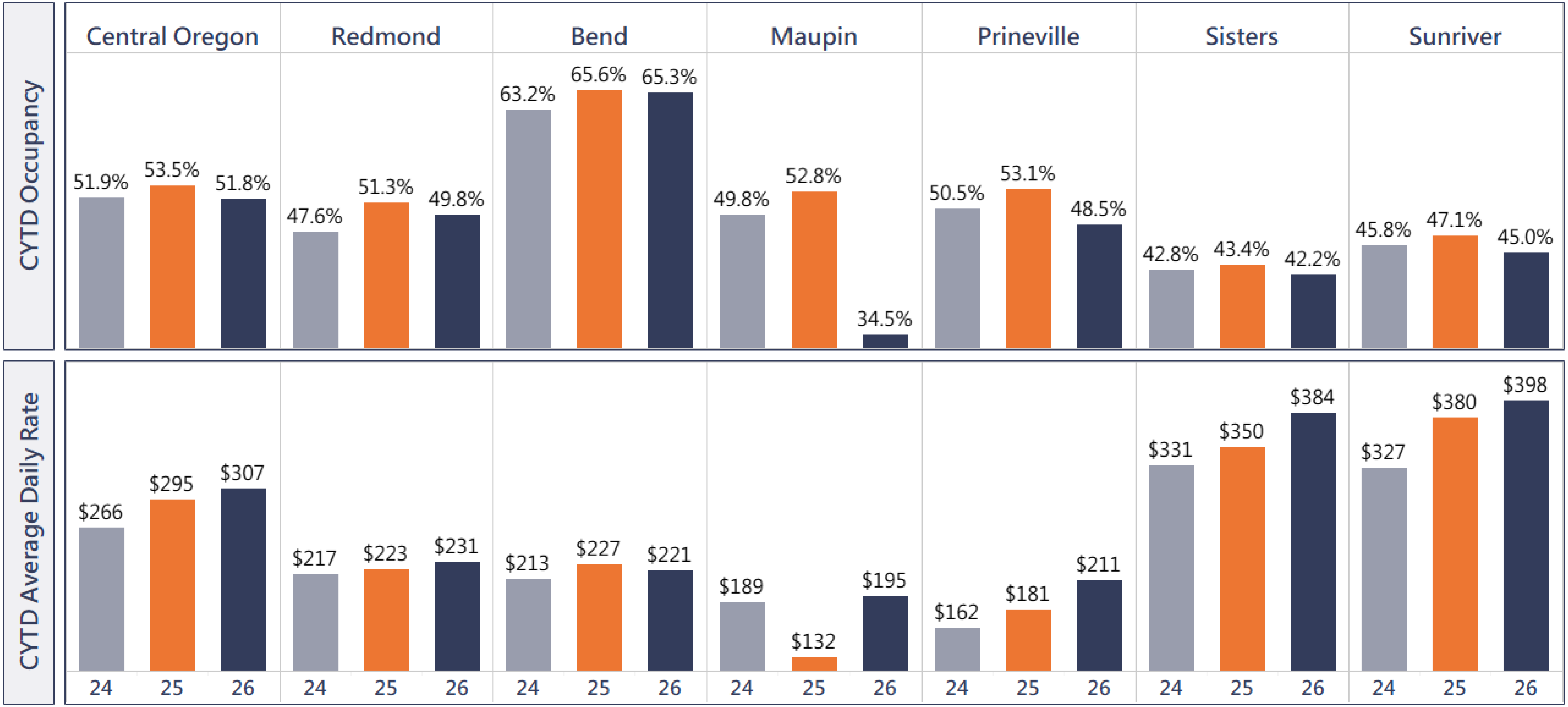
Source: AirDNA, 'Entire Place' Listings only

July 2026 Regional Summary



Source: AirDNA, 'Entire Place' Listings only

Calendar YTD Through July 2026

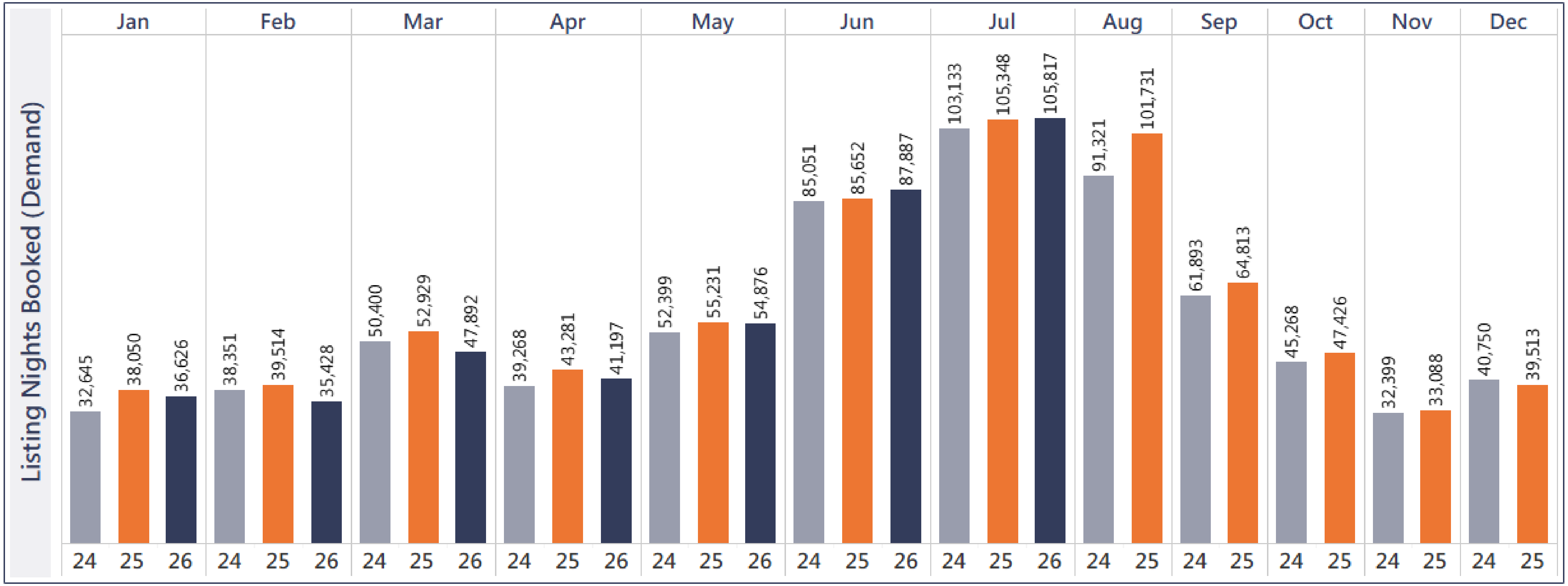


Source: AirDNA, 'Entire Place' Listings only

Central Oregon Region

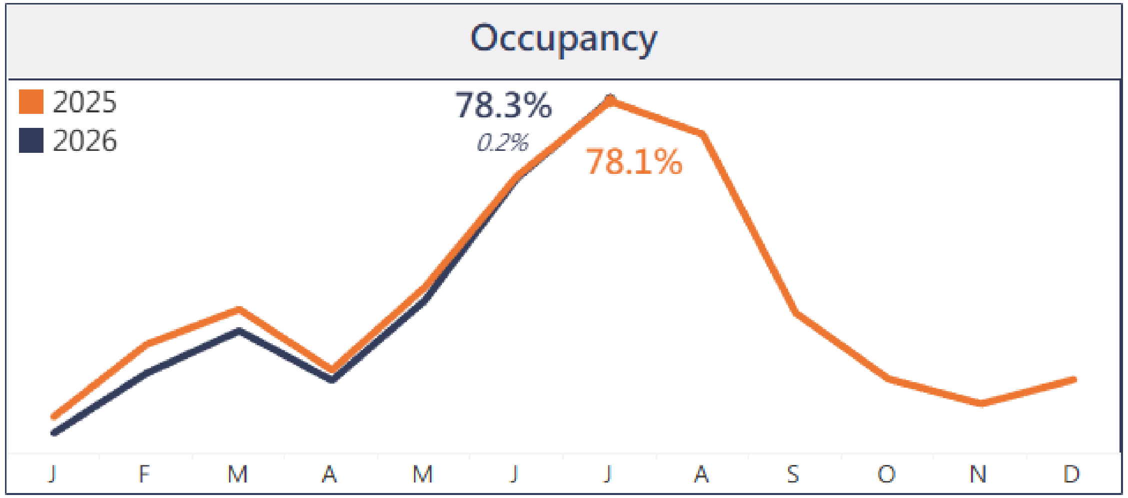
Central Oregon – July 2026

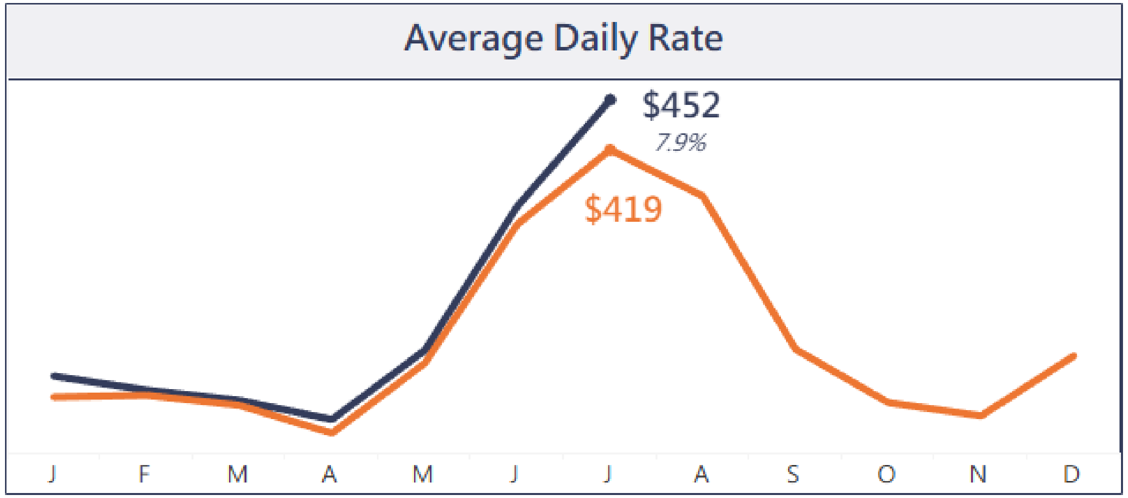
	Occupancy	ADR	RevPAR	Available Listings	Demand	Revenue
Jul '26	78.3%	$452.25	$354.17	5,168	105,817	$47,856,212
YOY	0.2%	7.9%	8.1%	1.5%	0.4%	8.4%

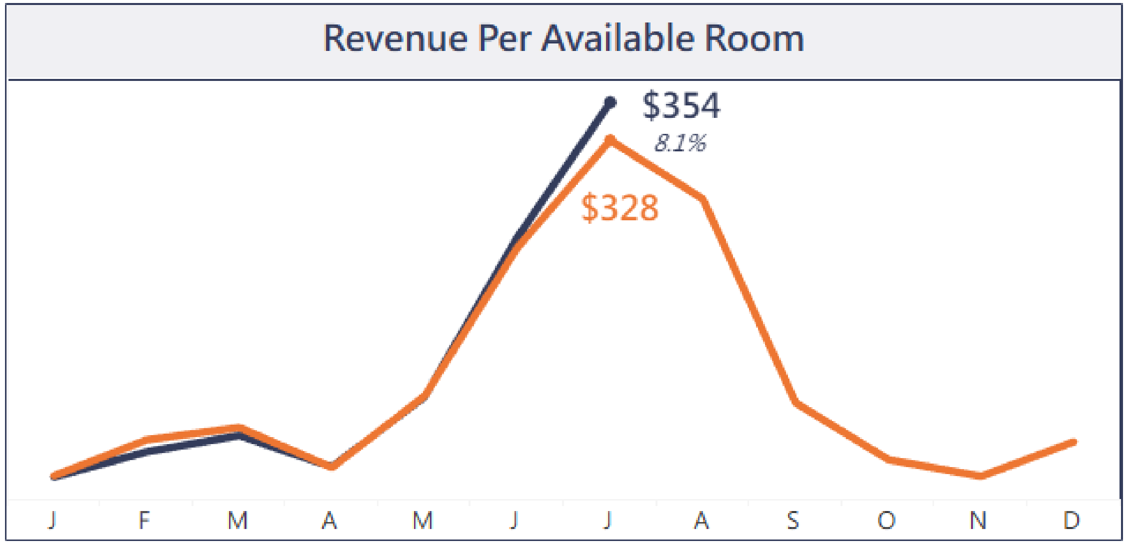


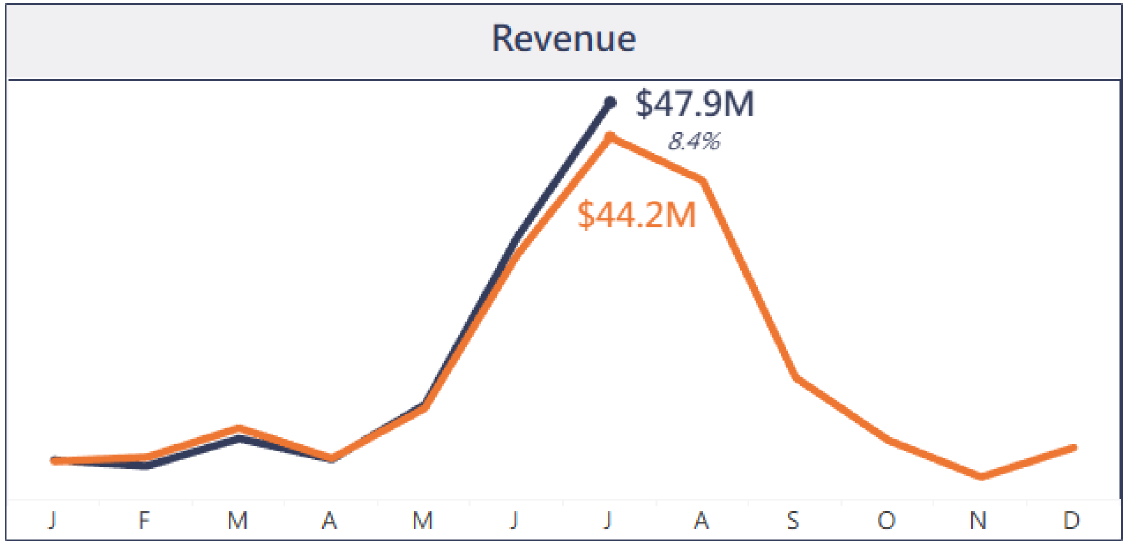
Source: AirDNA, 'Entire Place' Listings only

Central Oregon – July 2026







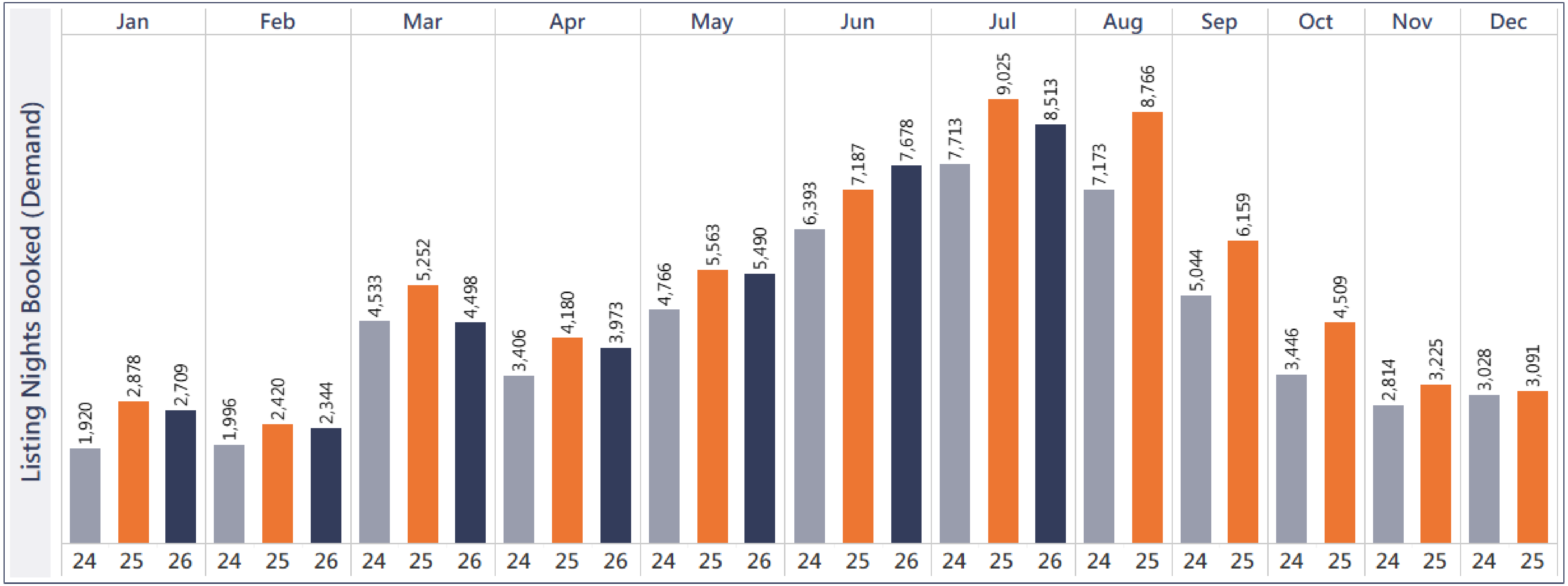


Source: AirDNA, 'Entire Place' Listings only

Redmond

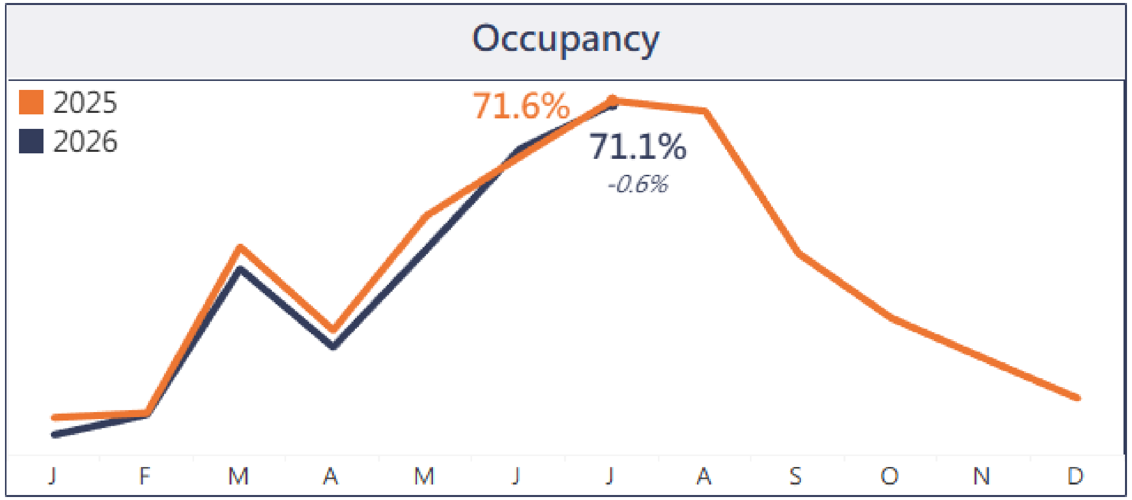
Redmond – July 2026

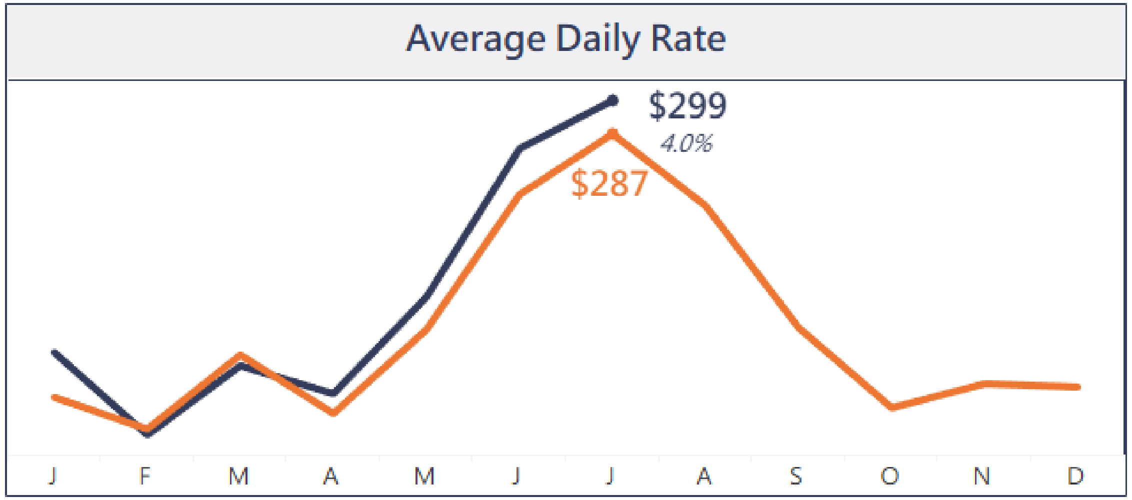
	Occupancy	ADR	RevPAR	Available Listings	Demand	Revenue
Jul '26	71.1%	$298.71	$212.51	454	8,513	$2,542,917
YOY	-0.6%	4.0%	3.3%	-1.3%	-5.7%	-1.9%

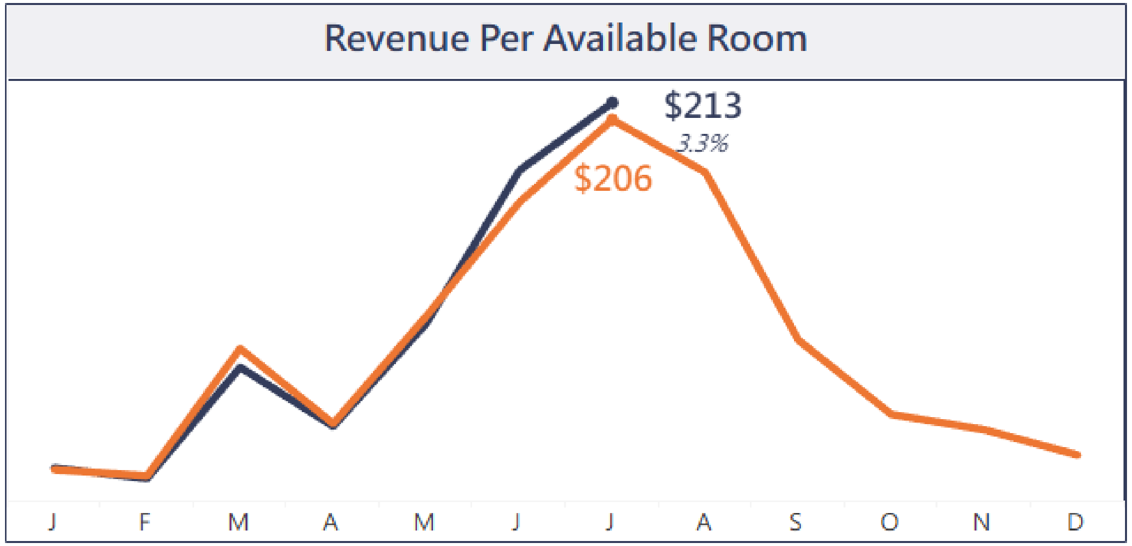


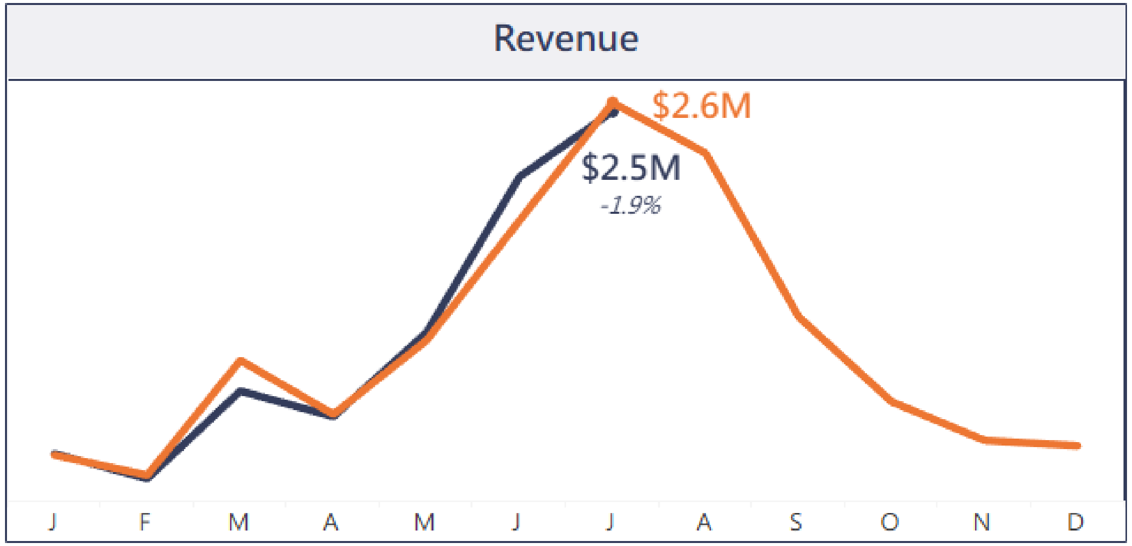
Source: AirDNA, 'Entire Place' Listings only

Redmond – July 2026









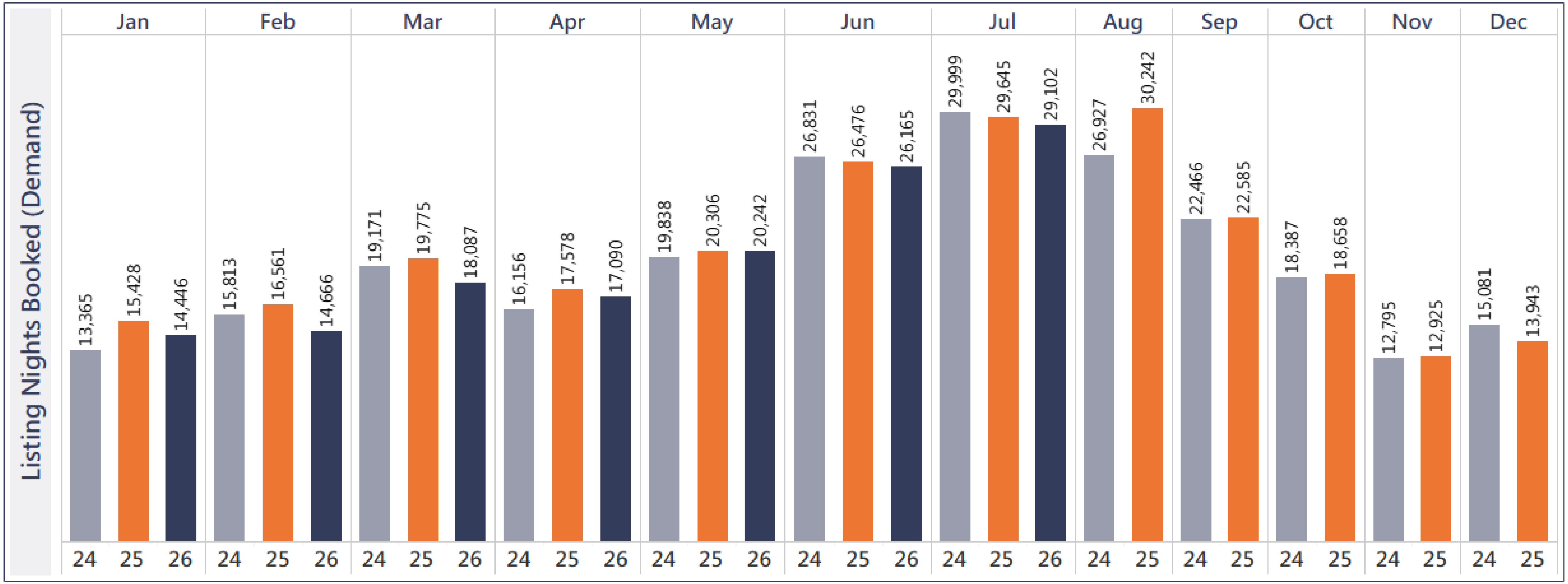
Source: AirDNA, 'Entire Place' Listings only


Bend

Bend – July 2026

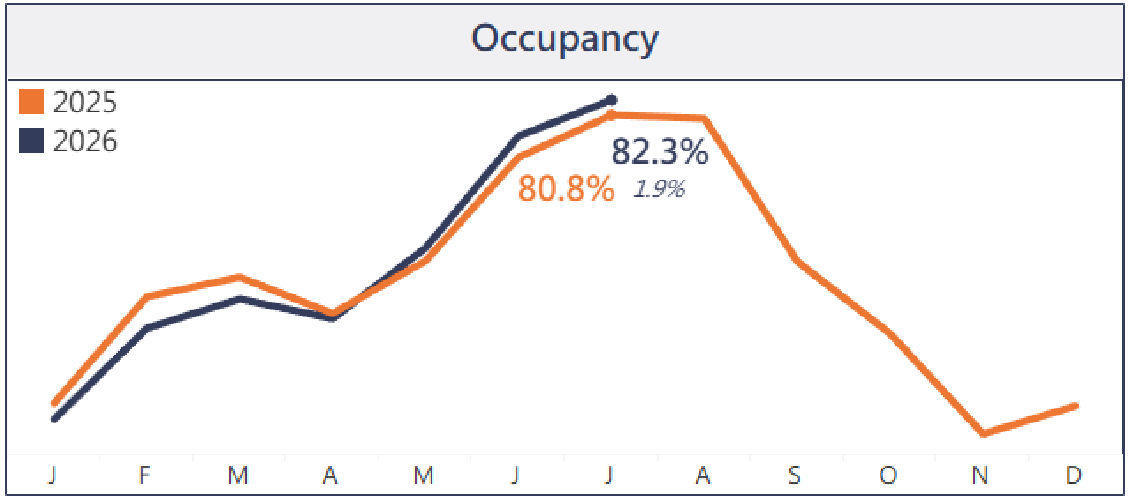
VISIT CENTRAL OREGON

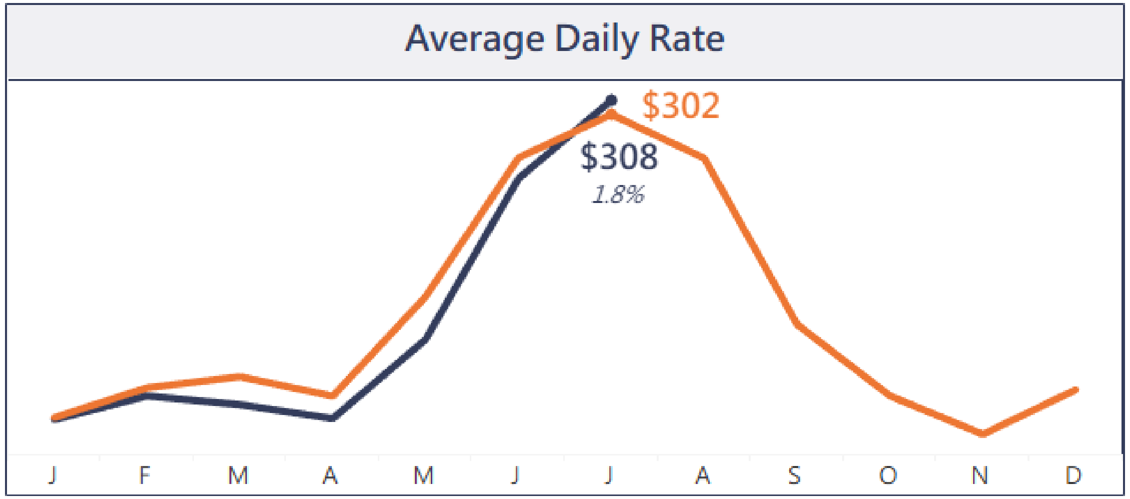
	Occupancy	ADR	RevPAR	Available Listings	Demand	Revenue
Jul '26	82.3%	$307.70	$253.29	1,295	29,102	$8,954,558
YOY	1.9%	1.8%	3.8%	-3.5%	-1.8%	0.0%

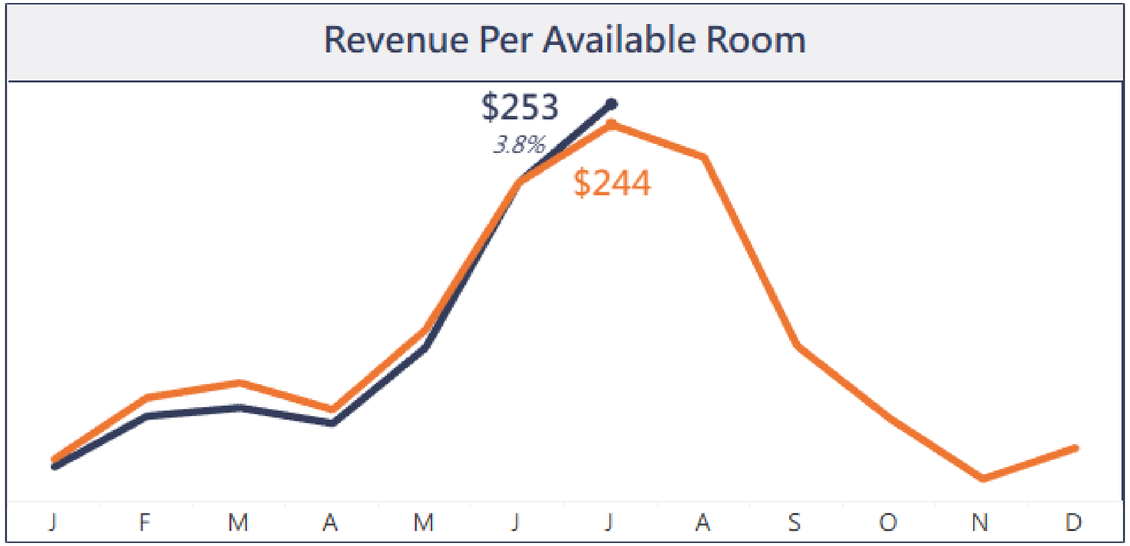


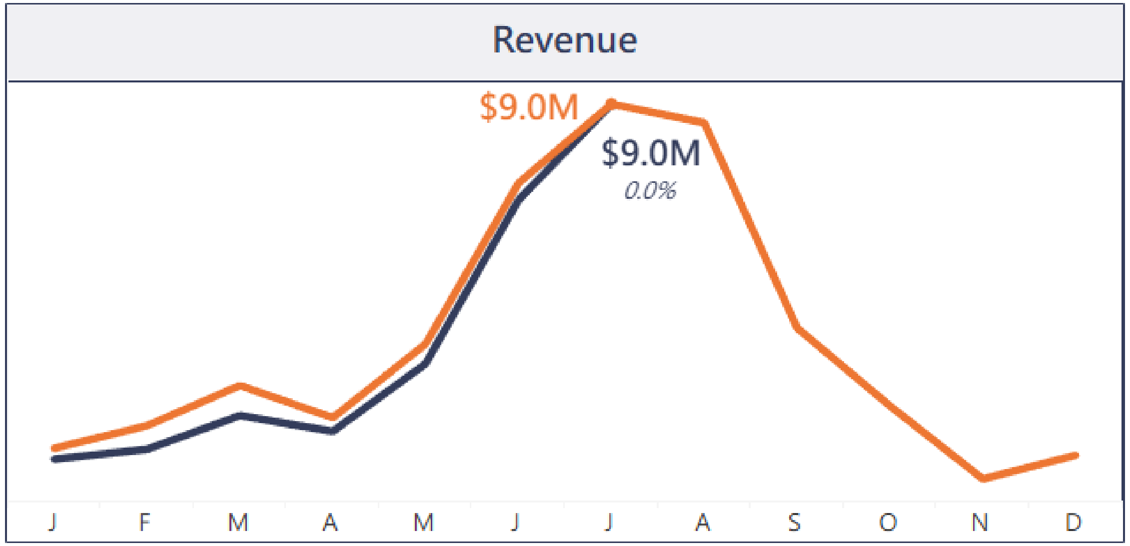
Source: AirDNA, 'Entire Place' Listings only

Bend – July 2026









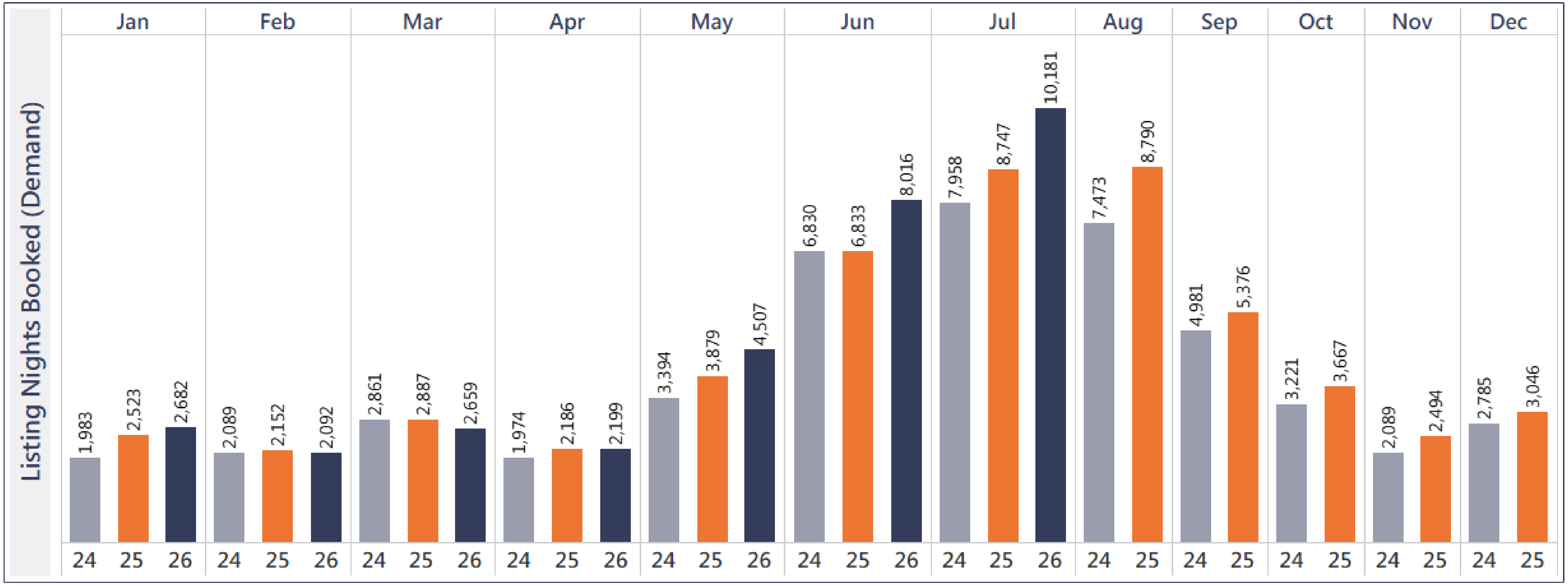
Source: AirDNA, 'Entire Place' Listings only


Sisters

Sisters – July 2026

VISIT CENTRAL OREGON

	Occupancy	ADR	RevPAR	Available Listings	Demand	Revenue
Jul '26	75.6%	$534.55	$404.06	523	10,181	$5,442,257
YOY	2.9%	13.7%	17.0%	14.2%	16.4%	32.4%

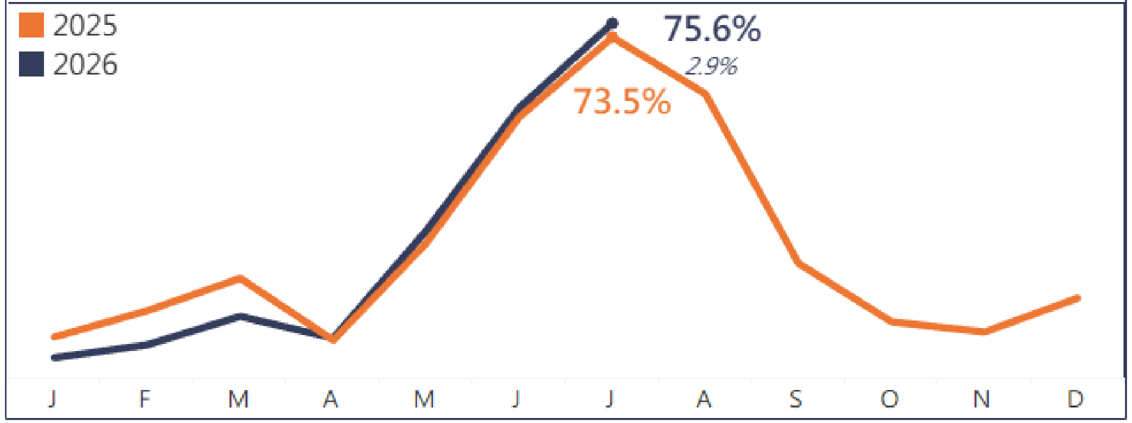


Source: AirDNA, 'Entire Place' Listings only

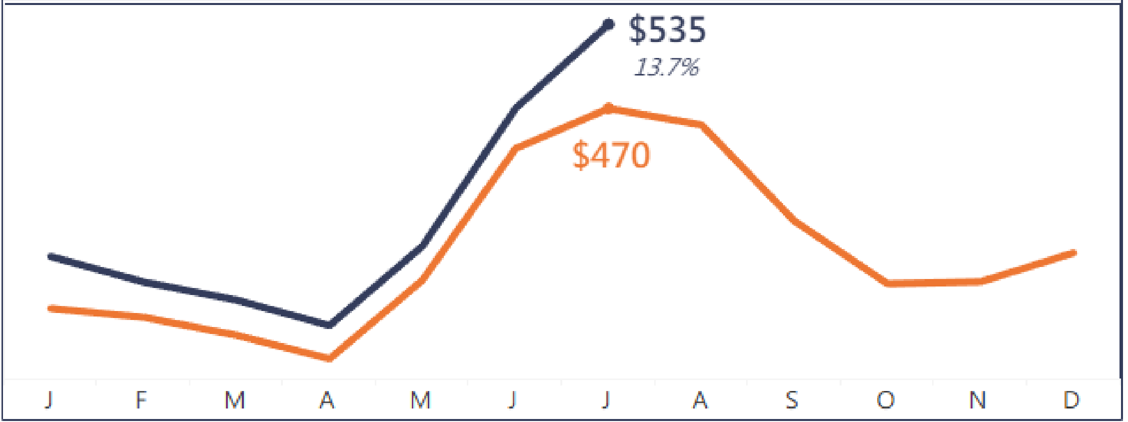
Sisters – July 2026

VISIT CENTRAL OREGON

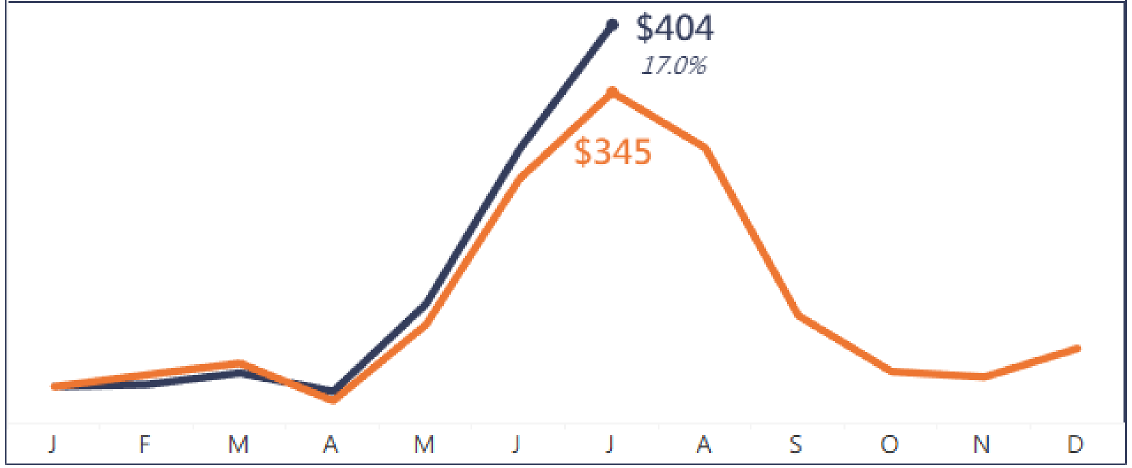
Occupancy



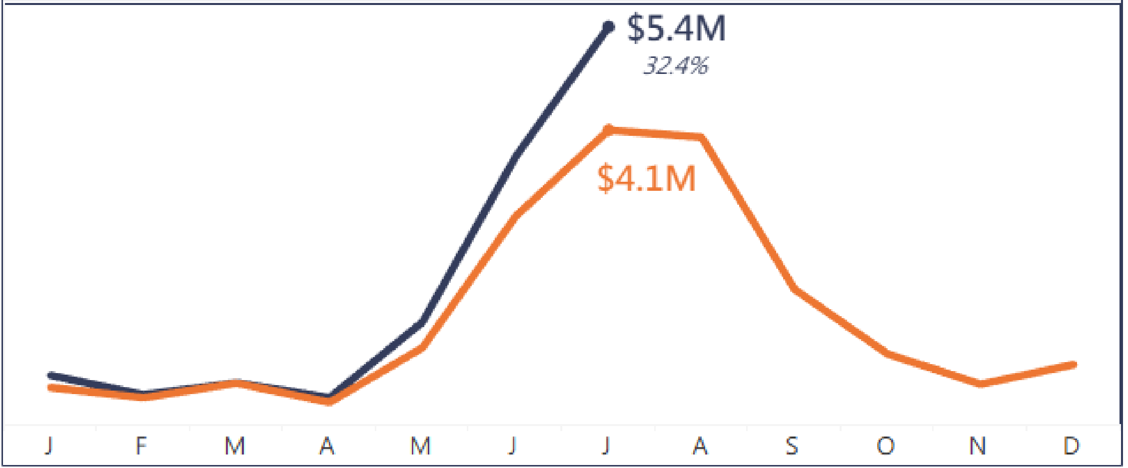
Average Daily Rate



Revenue Per Available Room



Revenue

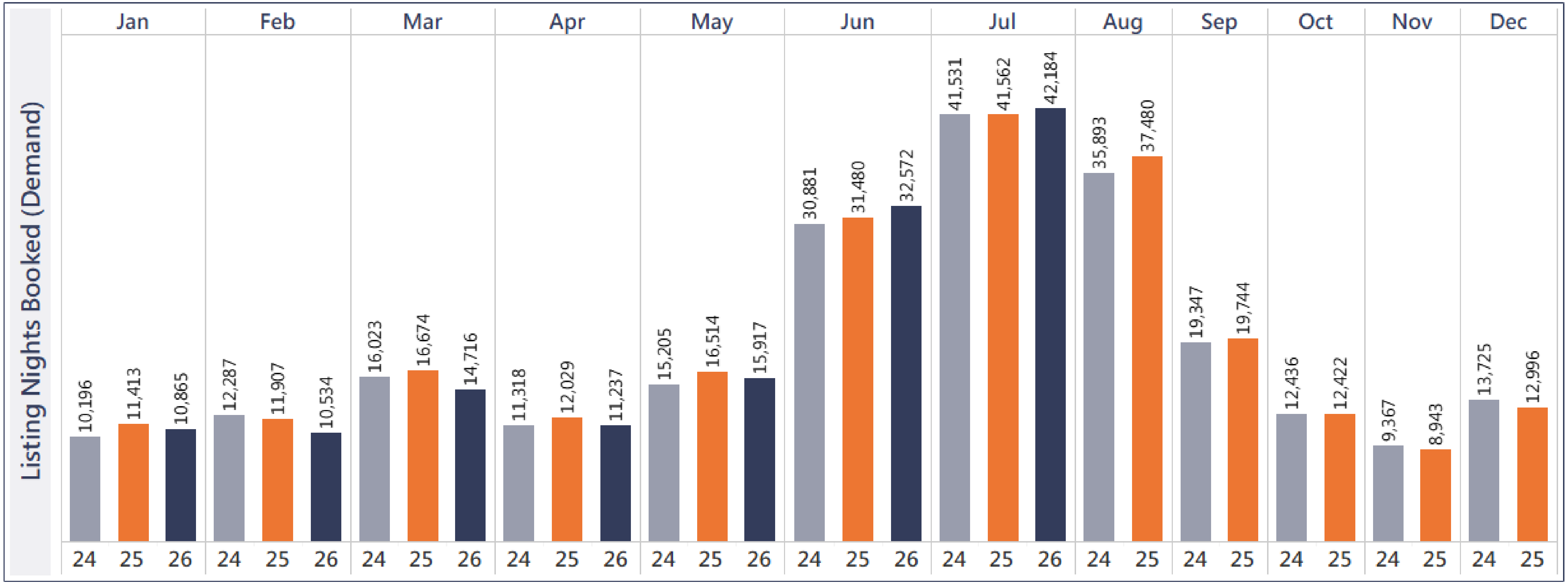


Source: AirDNA, 'Entire Place' Listings only


Sunriver

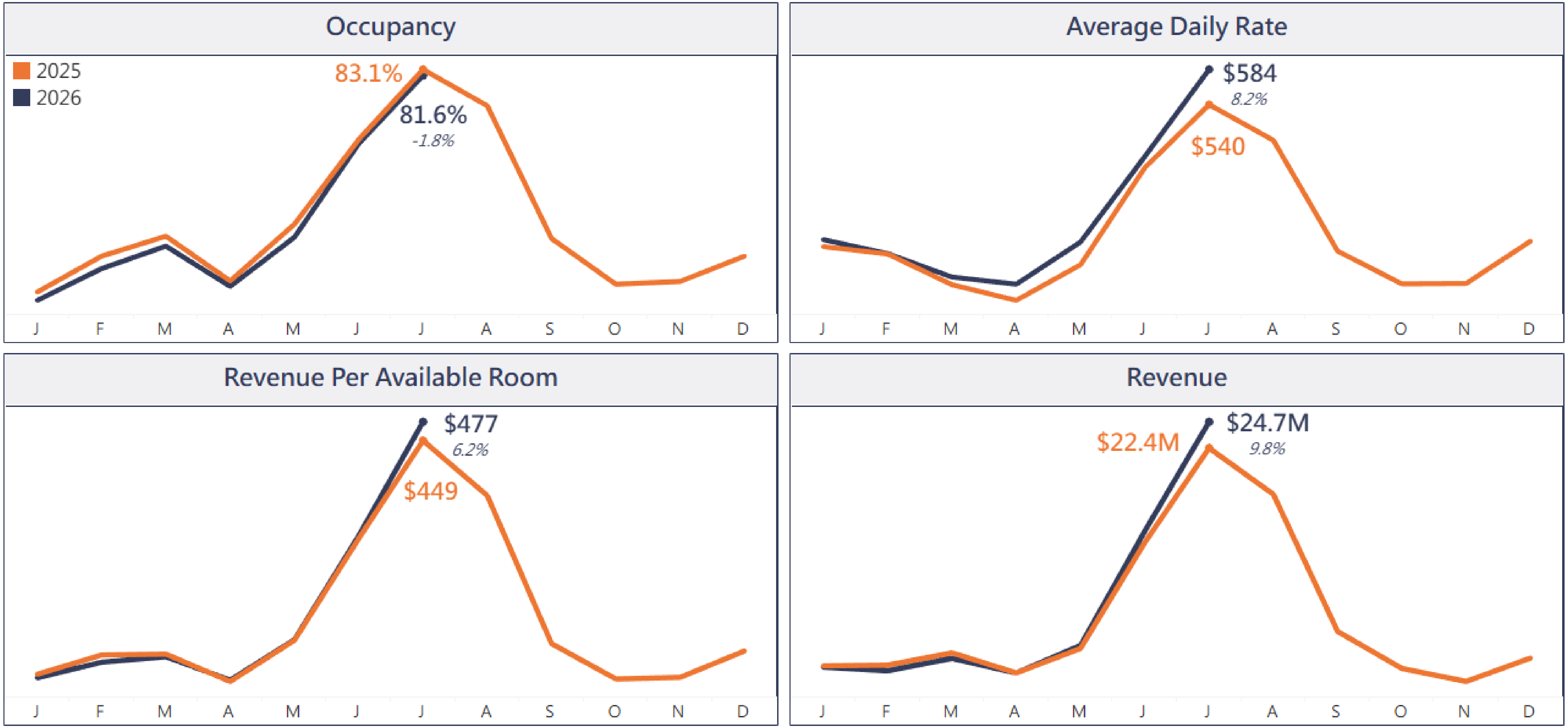
Sunriver – July 2026

	Occupancy	ADR	RevPAR	Available Listings	Demand	Revenue
Jul '26	81.6%	$584.36	$476.56	1,997	42,184	$24,650,624
YOY	-1.8%	8.2%	6.2%	2.7%	1.5%	9.8%



Source: AirDNA, 'Entire Place' Listings only

Sunriver – July 2026

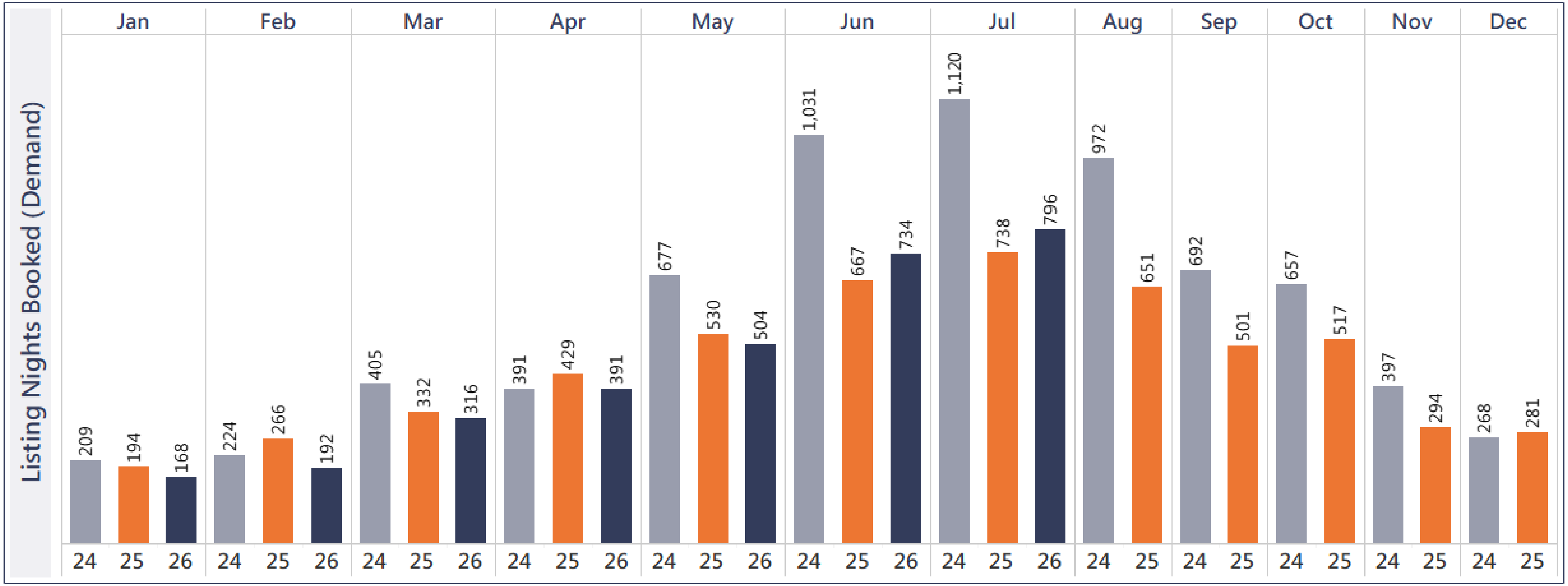


Source: AirDNA, 'Entire Place' Listings only


Prineville

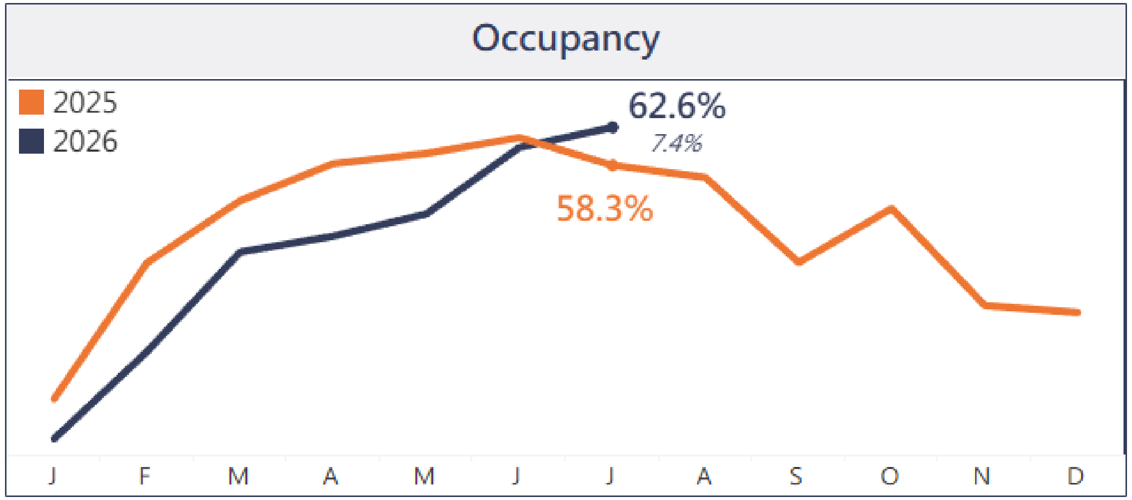
Prineville – July 2026

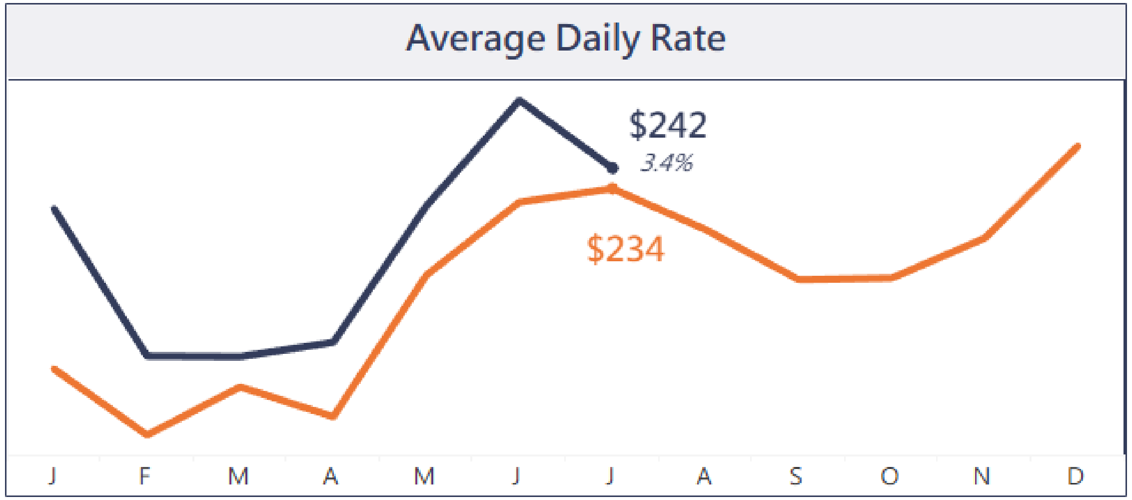
	Occupancy	ADR	RevPAR	Available Listings	Demand	Revenue
Jul '26	62.6%	$242.49	$151.87	49	796	$193,026
YOY	7.4%	3.4%	11.0%	8.9%	7.9%	11.6%

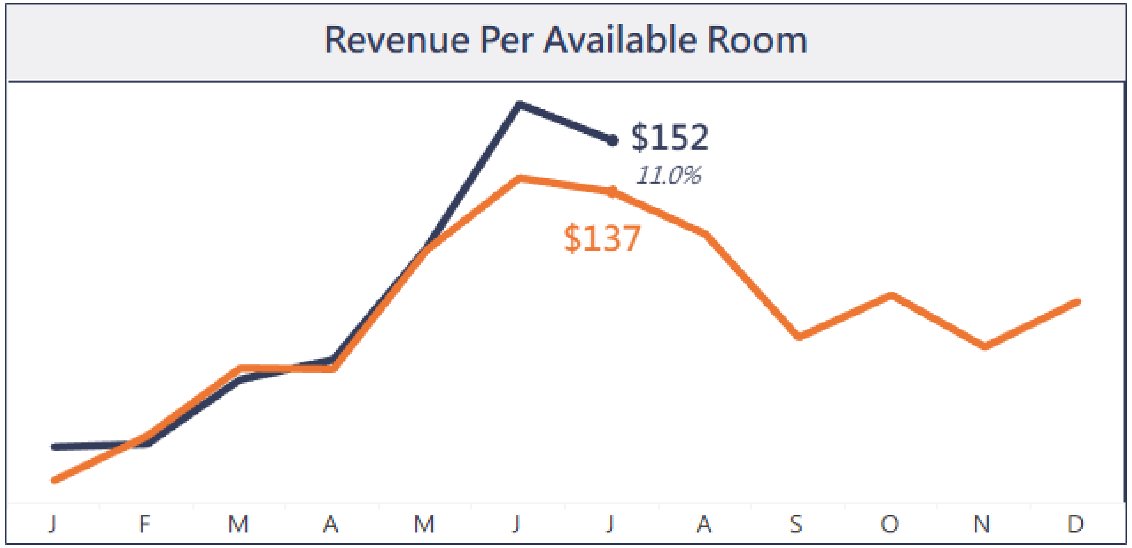


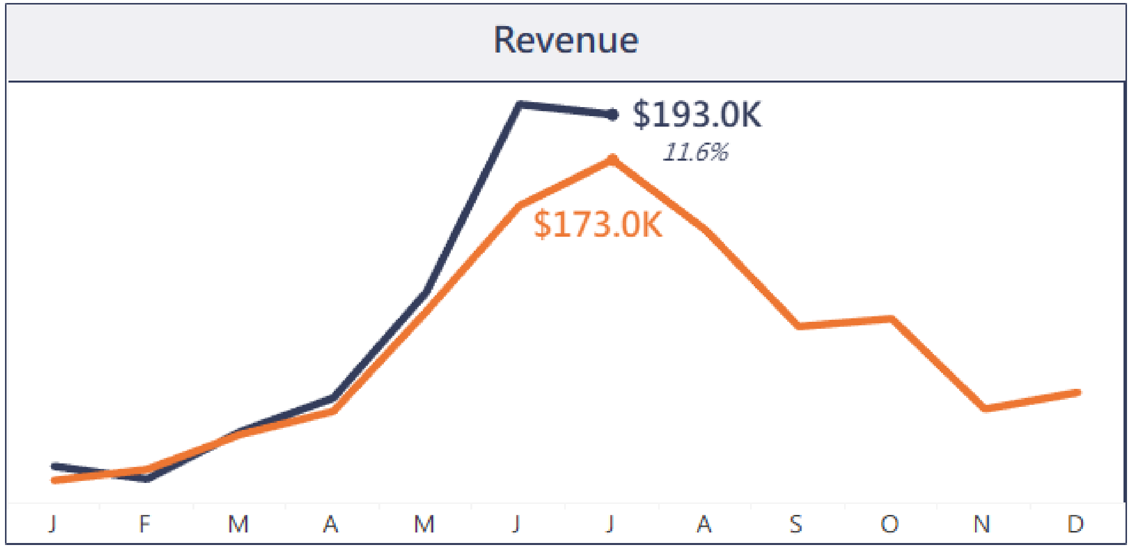
Source: AirDNA, 'Entire Place' Listings only

Prineville – July 2026







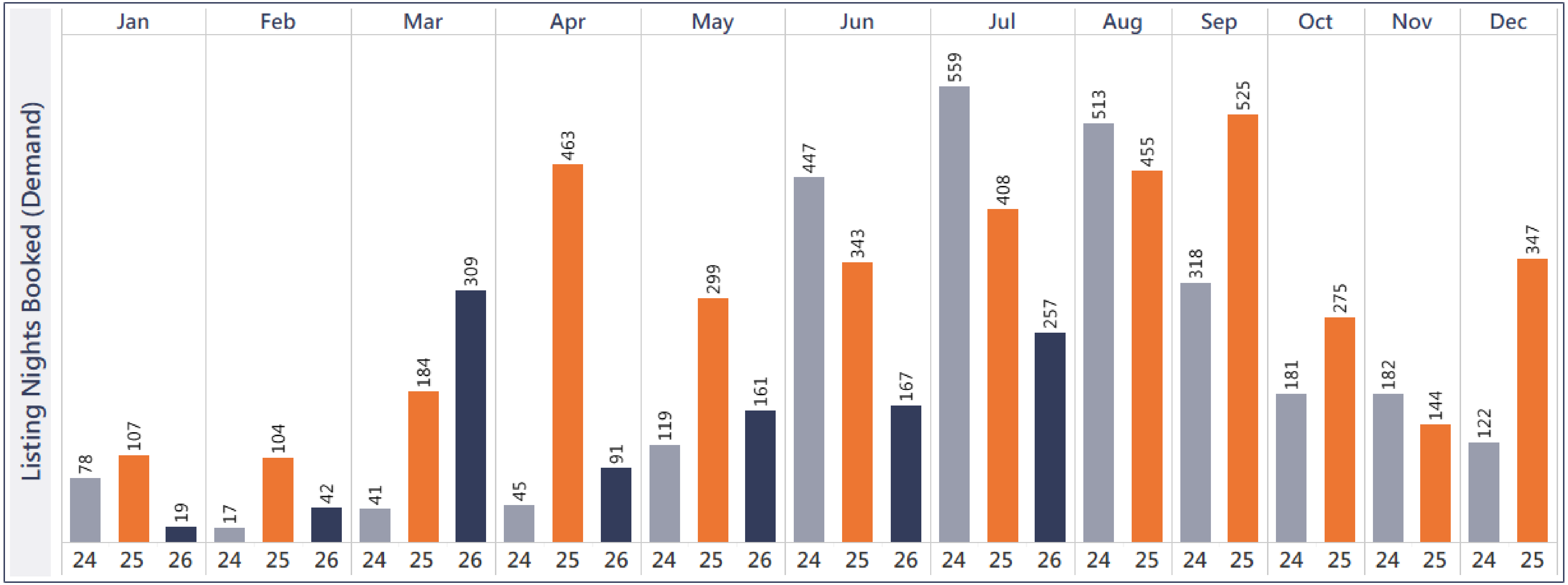


Source: AirDNA, 'Entire Place' Listings only

Maupin

Maupin – July 2026

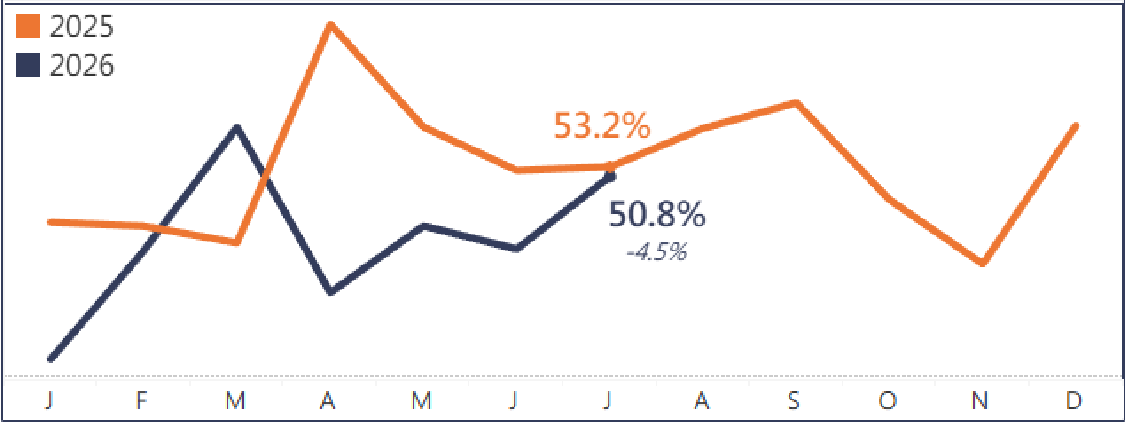
	Occupancy	ADR	RevPAR	Available Listings	Demand	Revenue
Jul '26	50.8%	$186.19	$94.57	20	257	$47,851
YOY	-4.5%	16.6%	11.3%	-28.6%	-37.0%	-26.5%



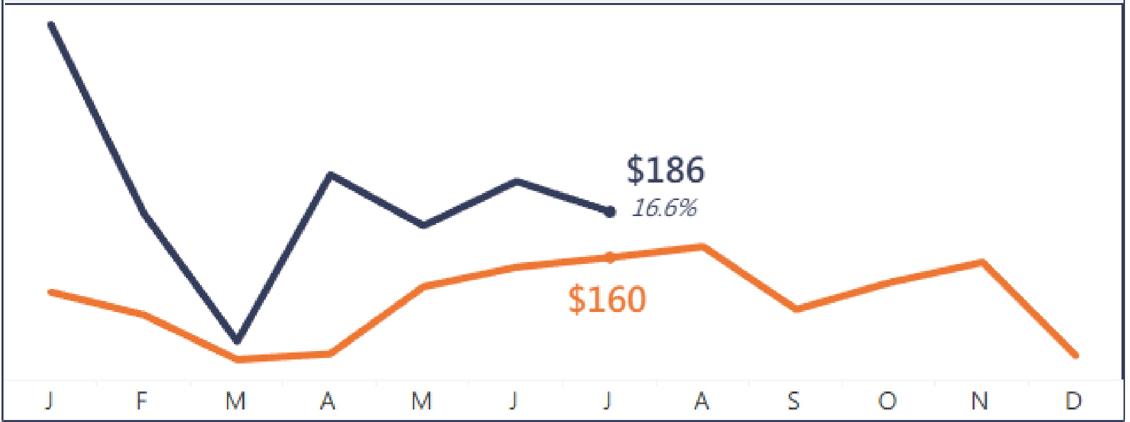
Source: AirDNA, 'Entire Place' Listings only

Maupin – July 2026

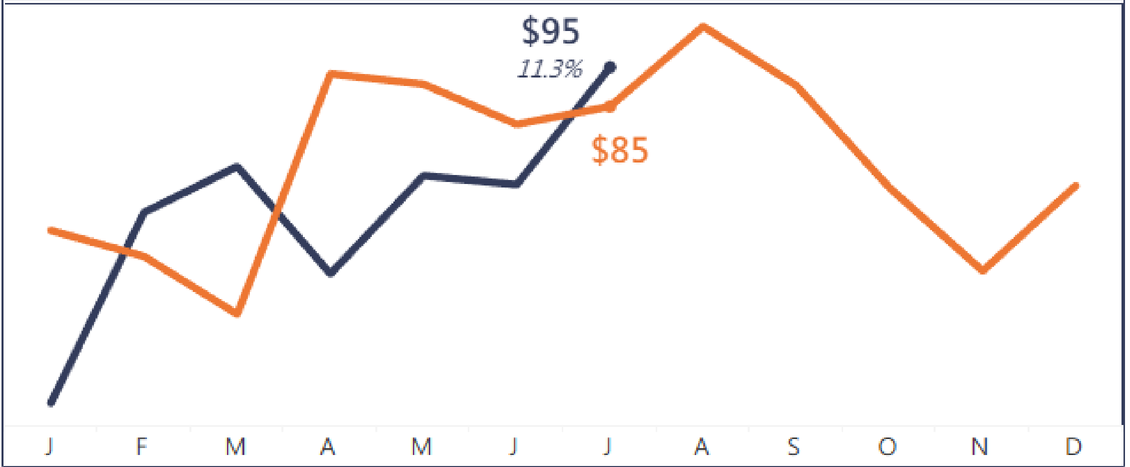
Occupancy



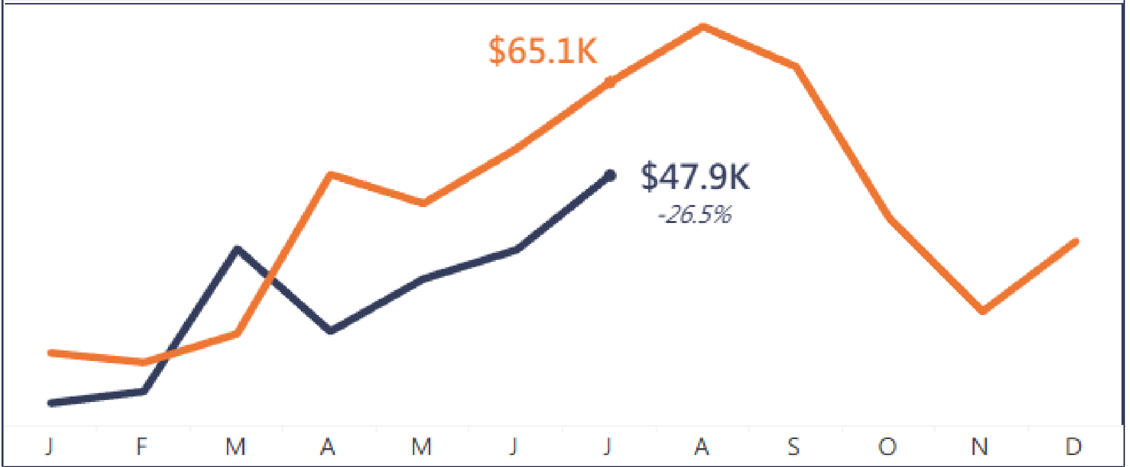
Average Daily Rate



Revenue Per Available Room



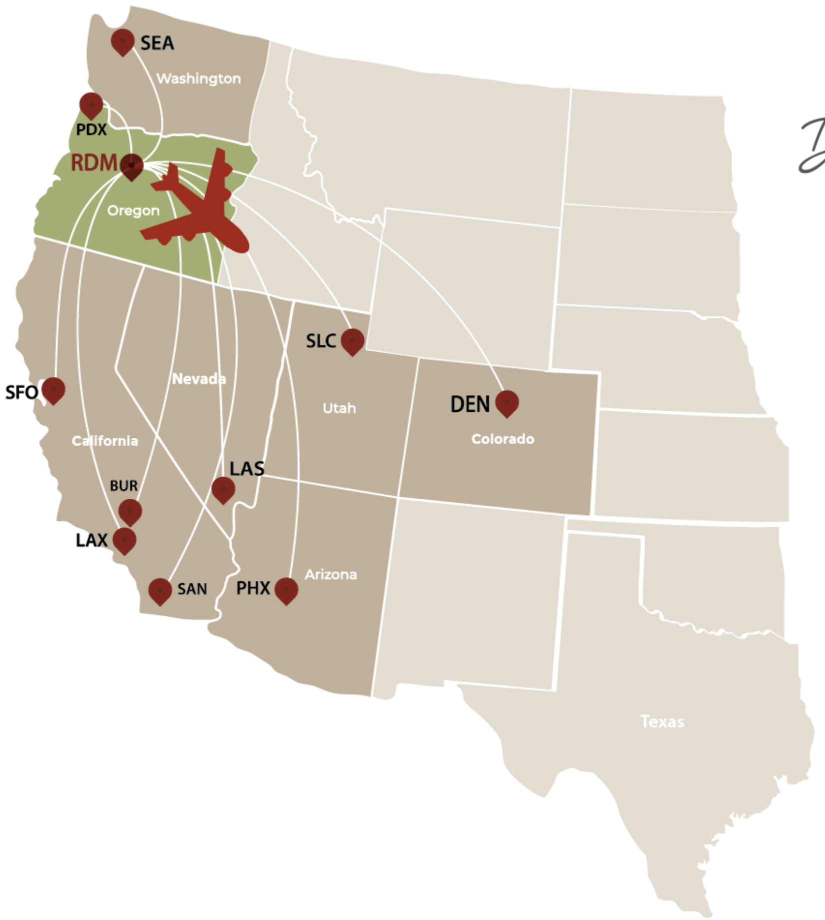
Revenue



Source: AirDNA, 'Entire Place' Listings only

Redmond Municipal Airport

RDM: Route Map

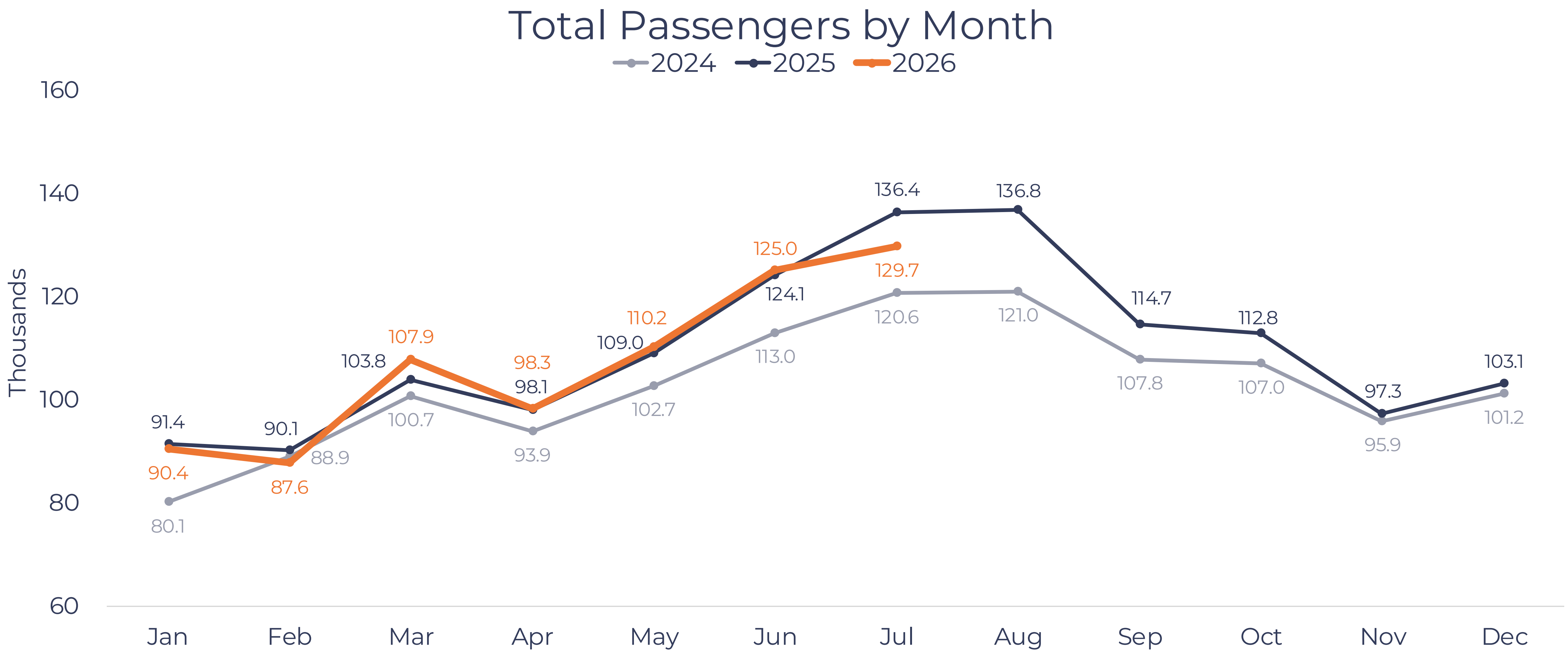


Direct Service to:

BURBANK
DENVER
LAS VEGAS
LOS ANGELES
PHOENIX
PORTLAND
SALT LAKE CITY
SAN DIEGO
SAN FRANCISCO
& SEATTLE

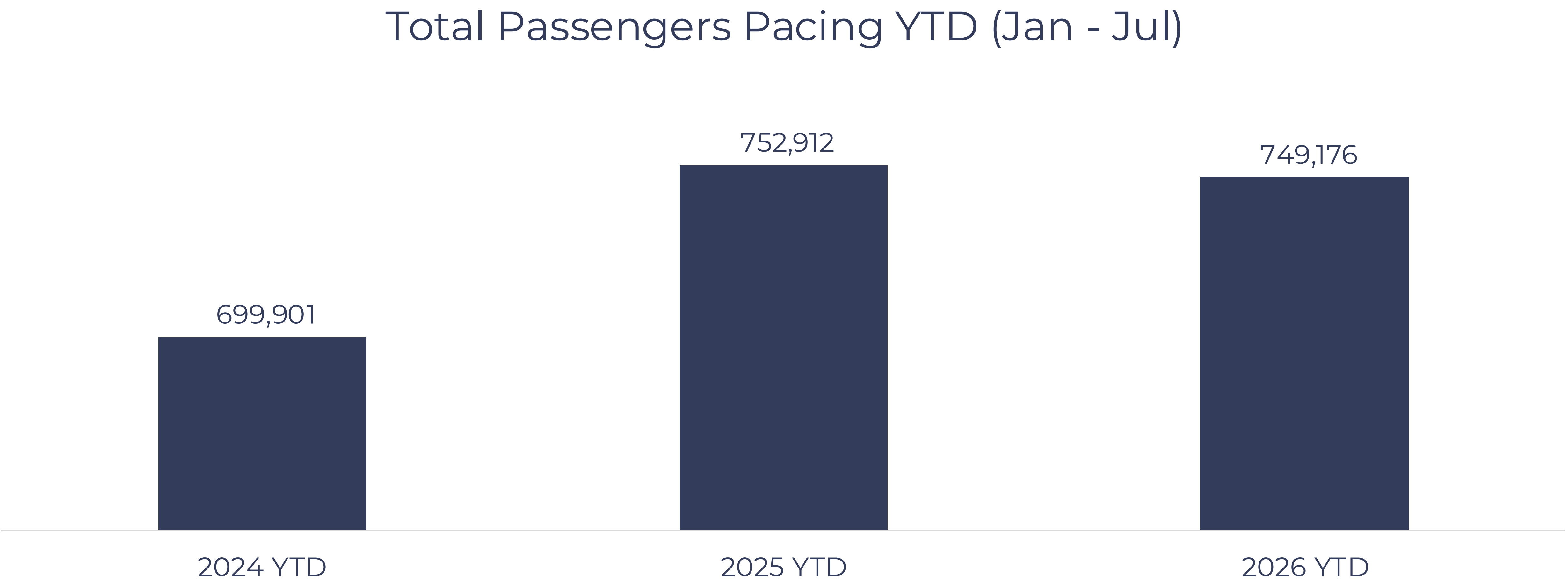
Source: Redmond Municipal Airport

RDM: Monthly Passengers



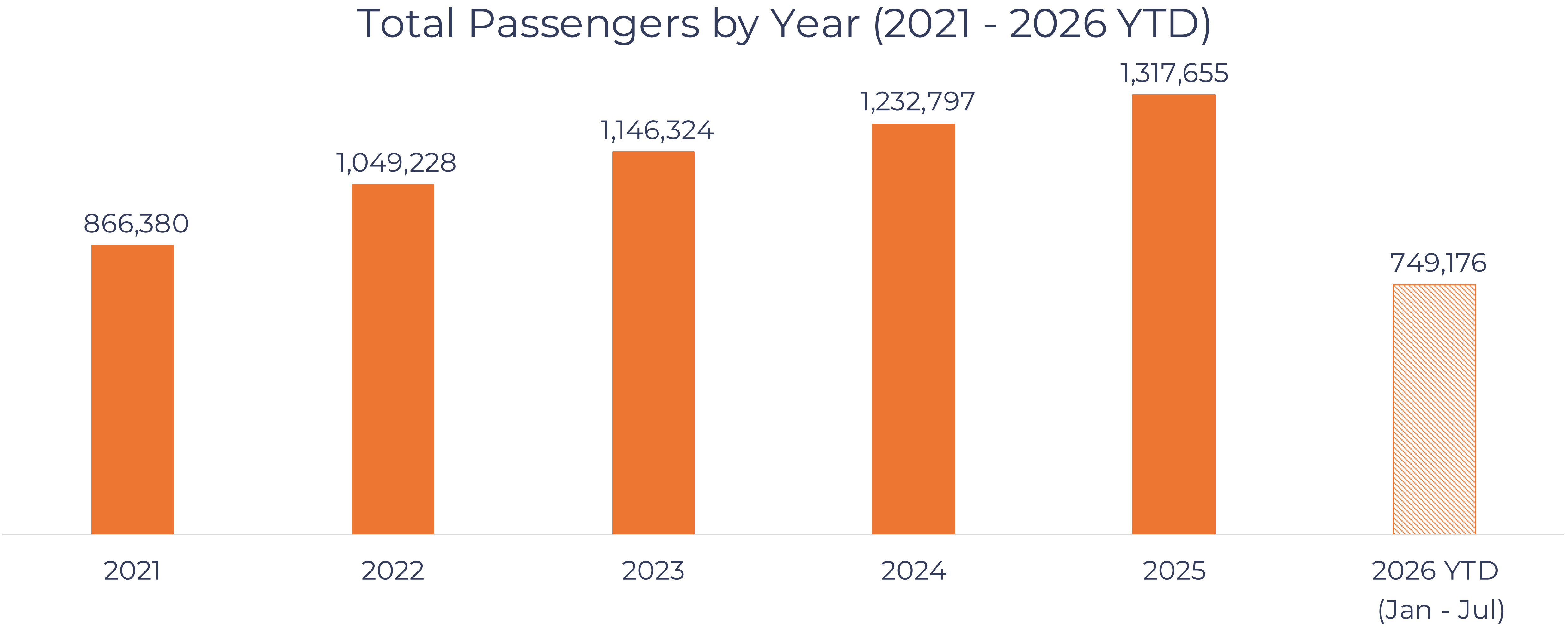
Source: Redmond Municipal Airport

RDM: Passenger Pacing



Source: Redmond Municipal Airport

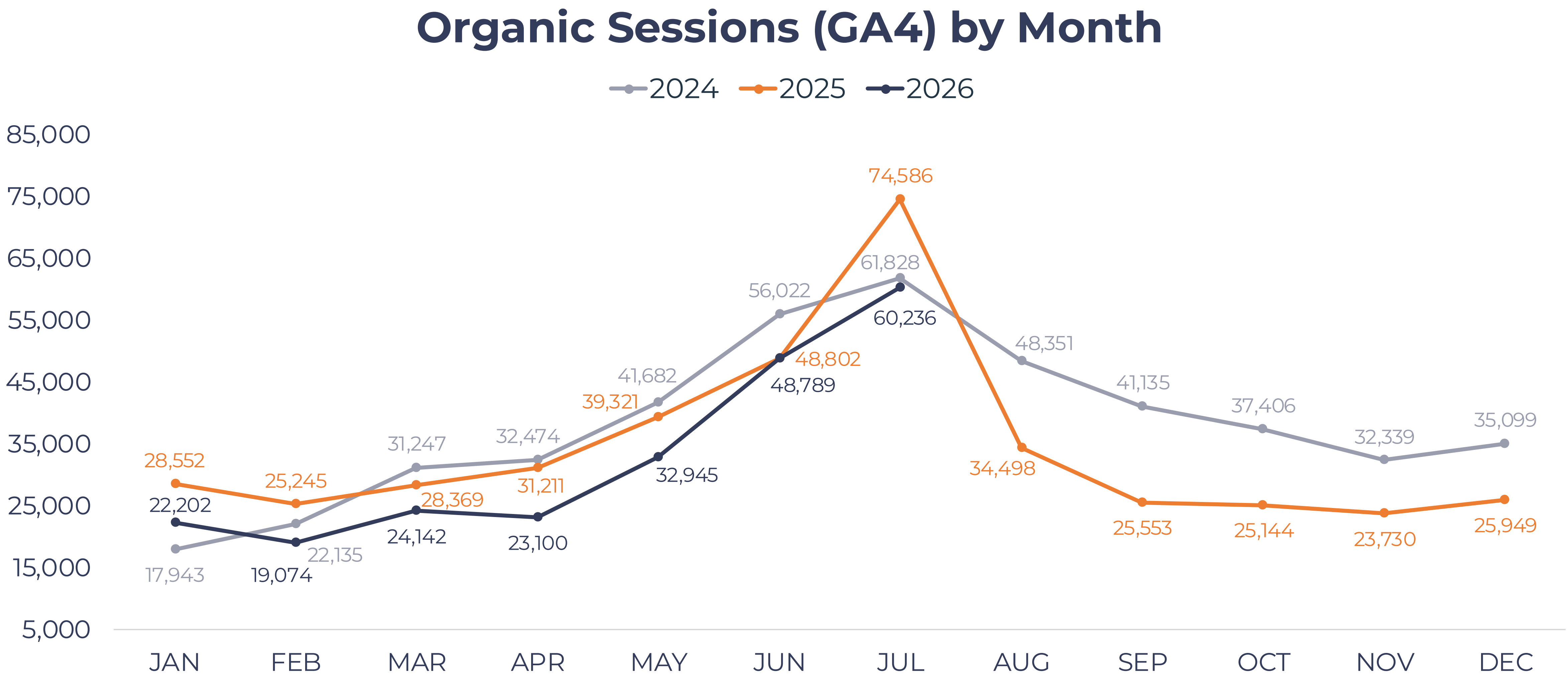
RDM: Passenger Volume



Source: Redmond Municipal Airport

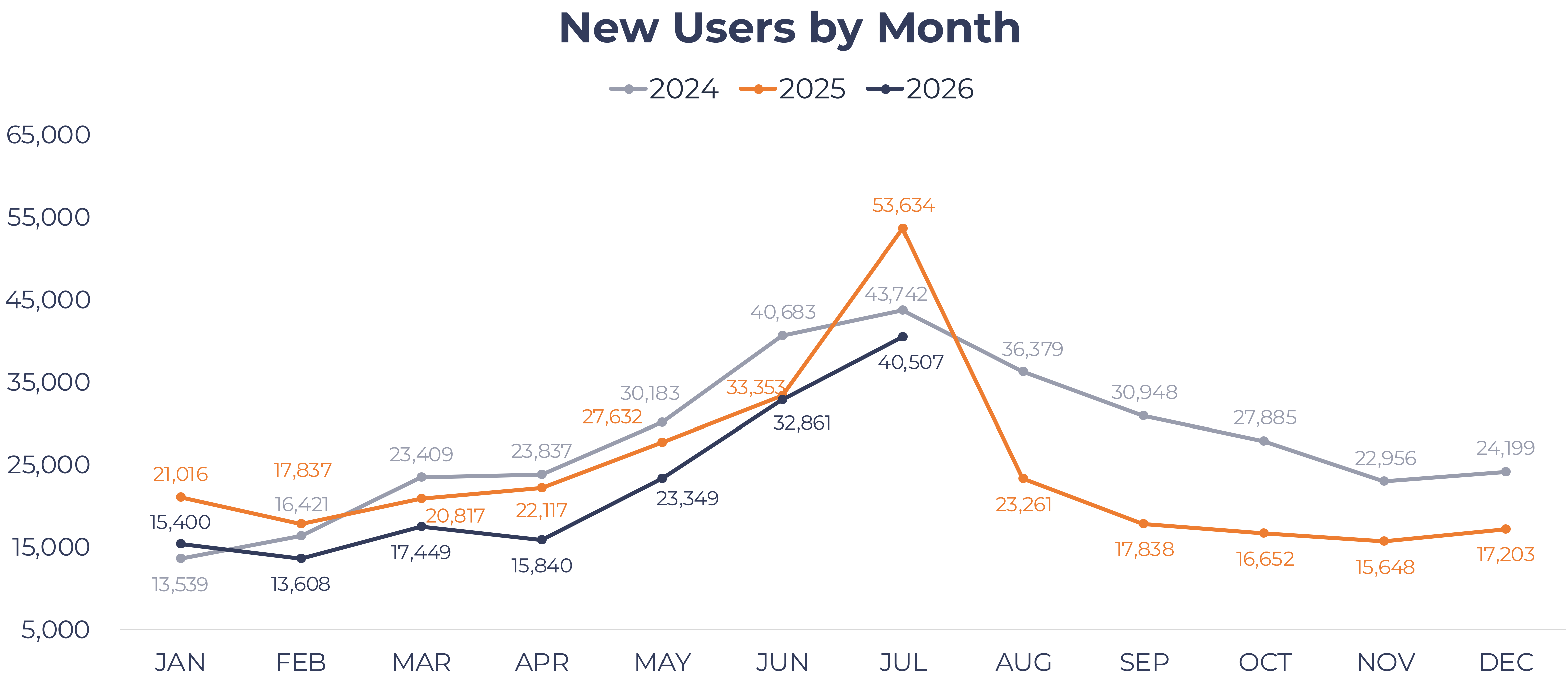
Marketing & Advertising Metrics

Organic Website Performance



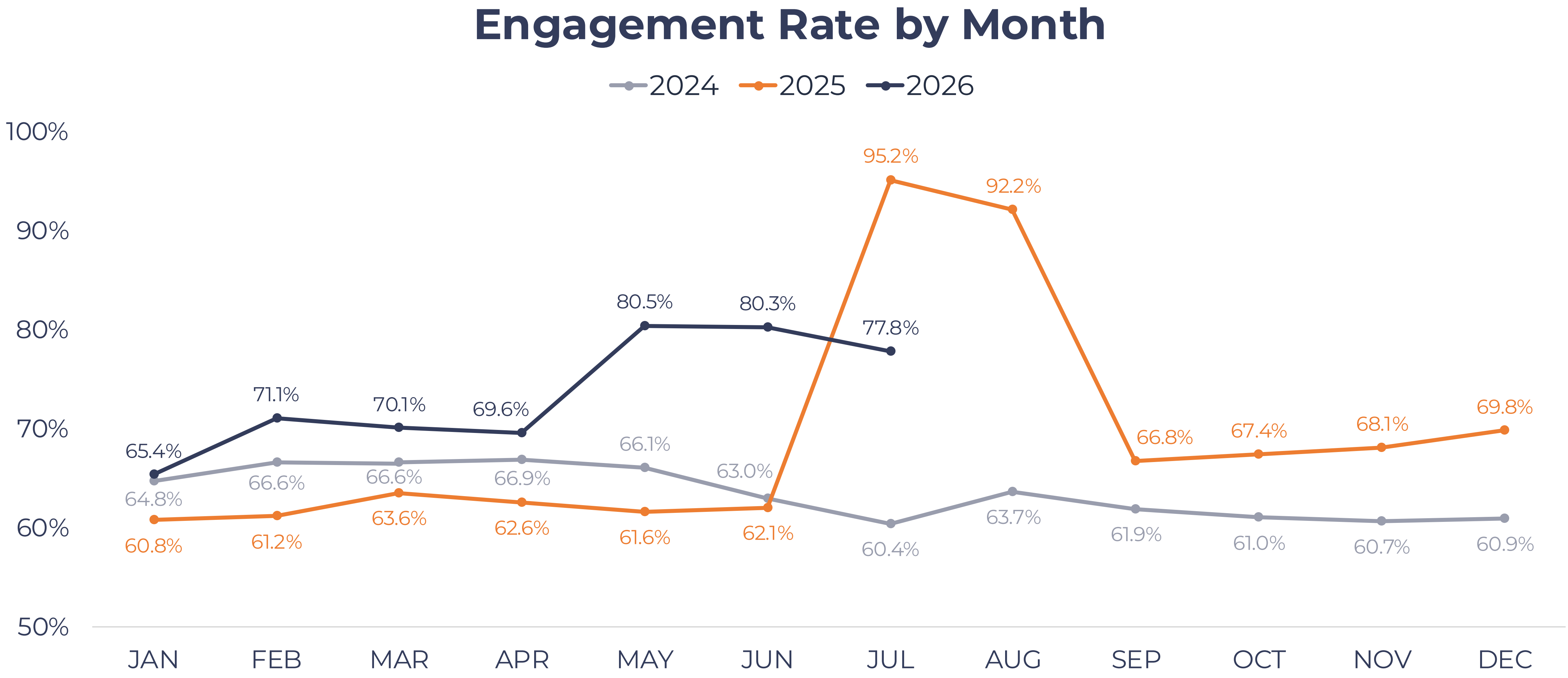
Source: GA4

Organic Website Performance



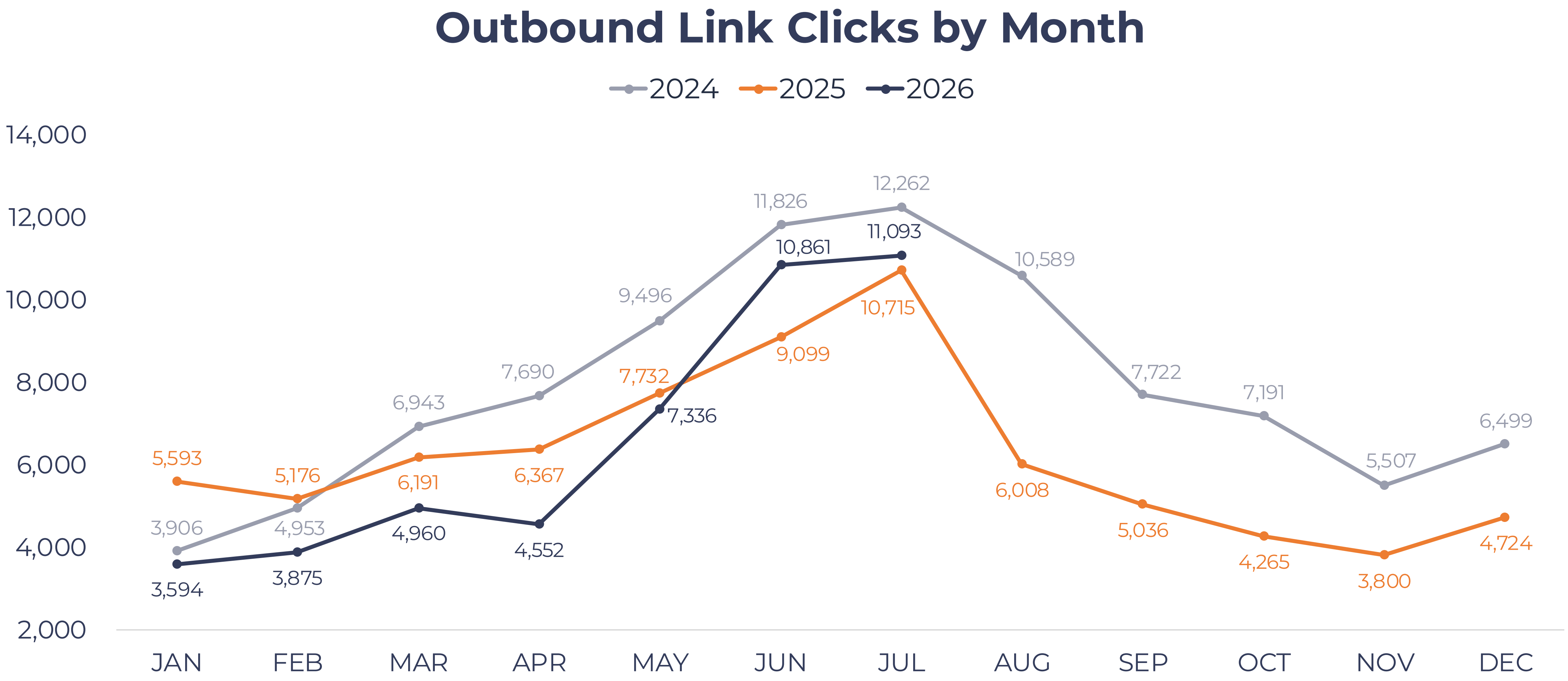
Source: GA4

Organic Website Performance



Source: GA4

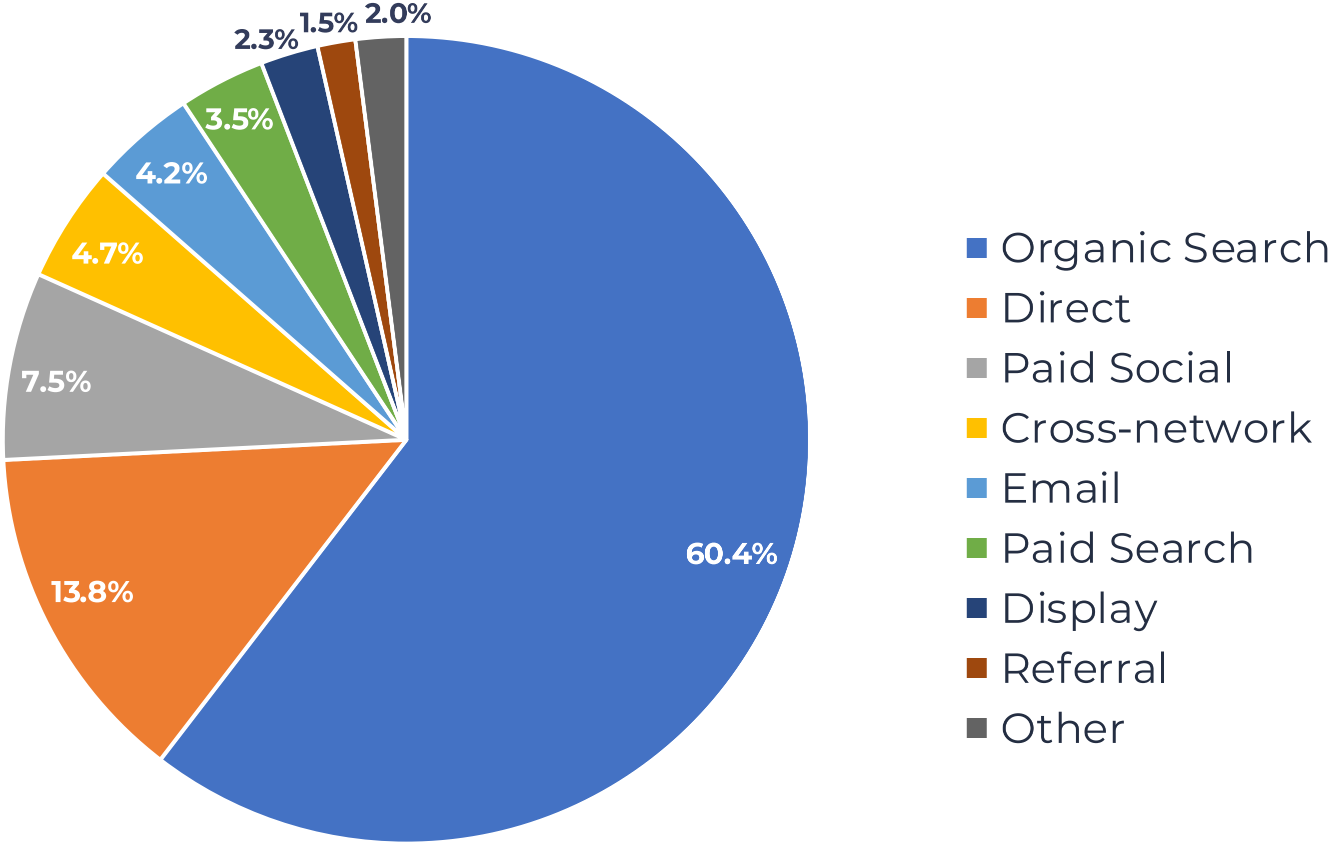
Organic Website Performance



Source: GA4

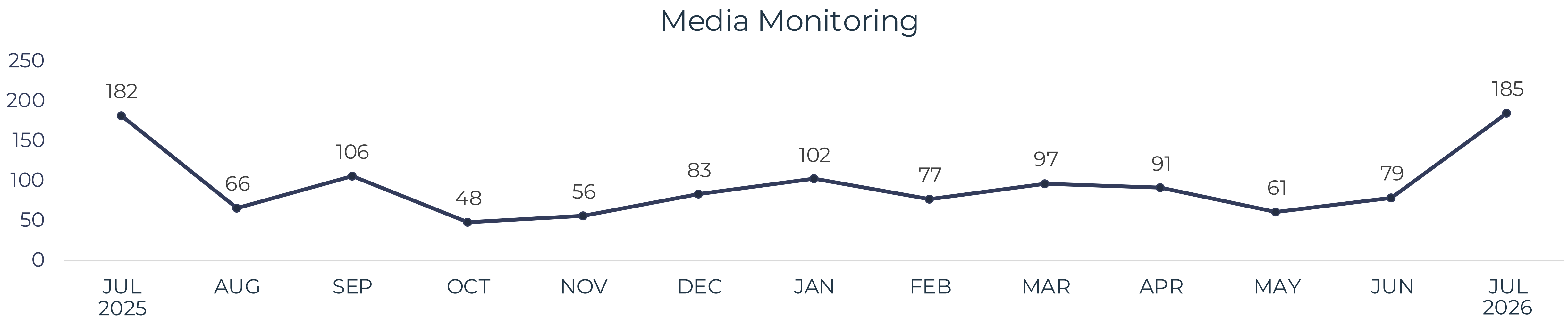
Website Conversion Overview

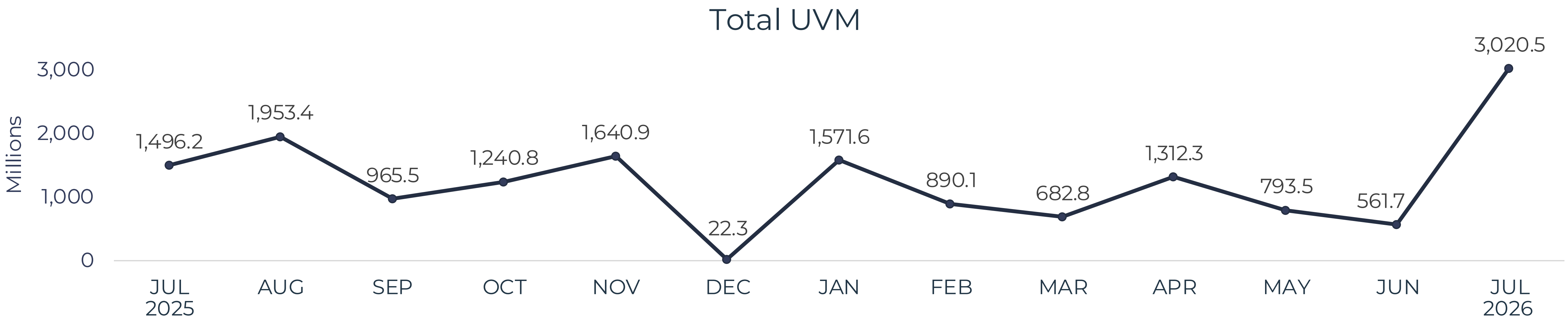
July 2026 – Monthly Channel Distribution



Source: GA4

Earned Media Overview





Source: GA4

Top Pages – July 2026

Rank	Page Path and Screen Class	Total Users	Engagement Rate
1	/summer-activities-central-oregon	10,328	46%
2	/vacation-planning/resources/fire-information/	6,224	76%
3	/calendar-of-events/bend/	5,240	91%
4	/calendar-of-events/	3,045	91%
5	/	2,981	65%
6	/calendar-of-events/bend/page/2/	2,965	98%
7	/calendar-of-events/bend/page/3/	2,225	99%
8	/calendar-of-events/bend/page/4/	1,727	99%
9	/articles/how-to-float-the-deschutes-river-in-bend-oregon/	1,509	76%
10	/calendar-of-events/page/2/	1,450	99%

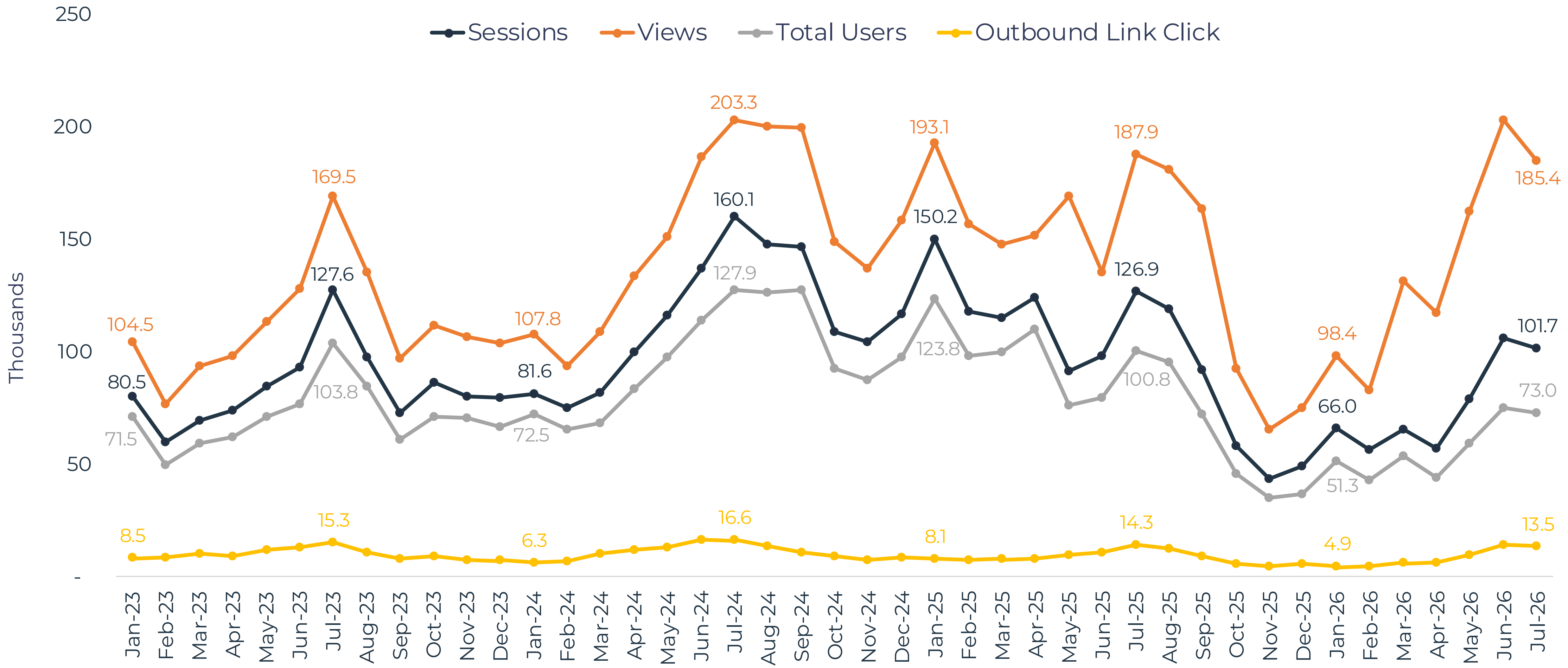
Source: GA4

Top Cities – July 2026

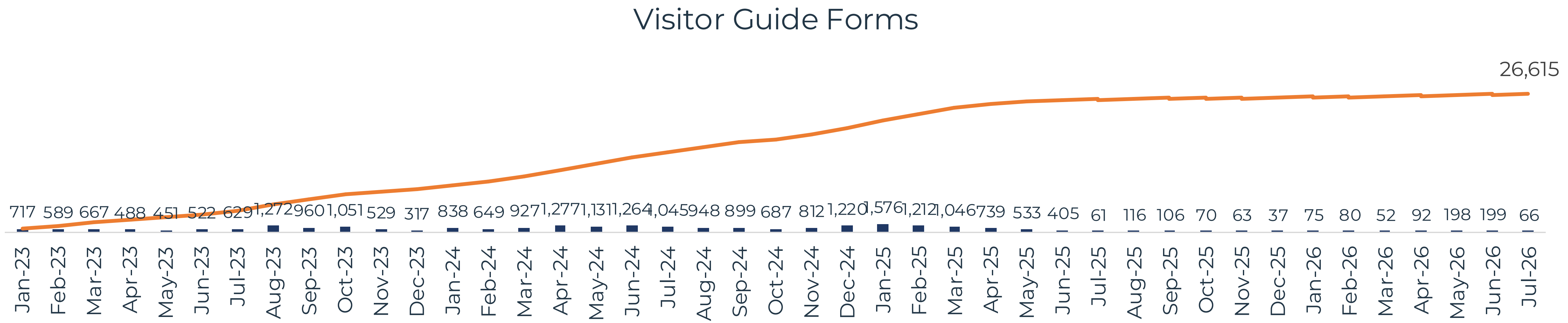
Rank	City	Total Users	Engagement Rate
1	Portland, OR	7,215	76%
2	Bend, OR	5,815	80%
3	Seattle, WA	3,496	74%
4	Los Angeles, CA	3,197	61%
5	Ashburn, VA	1,523	89%
6	Redmond, OR	1,515	81%
7	Las Vegas Valley, NV	1,339	60%
8	San Francisco, CA	924	62%
9	Sunriver, OR	919	84%
10	San Jose, CA	917	67%

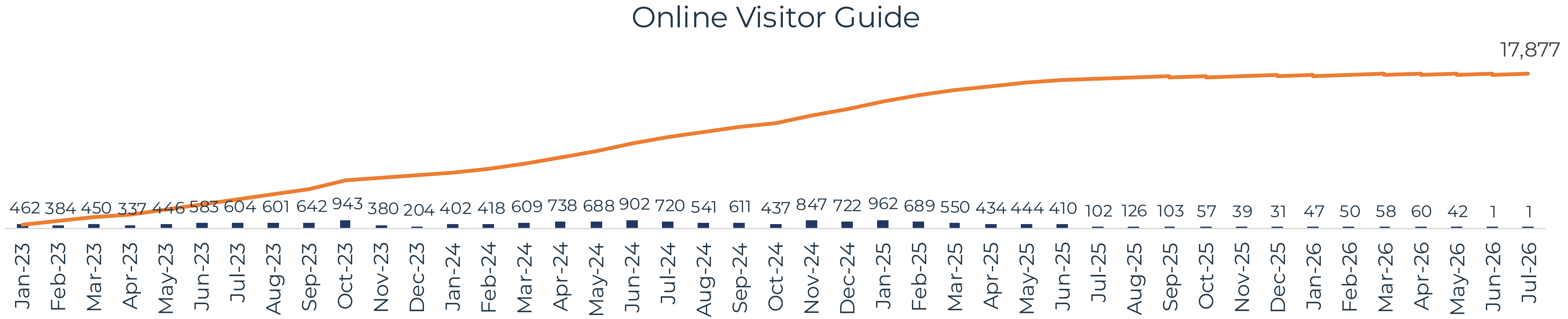
Source: GA4

GA4 – Website Conversions

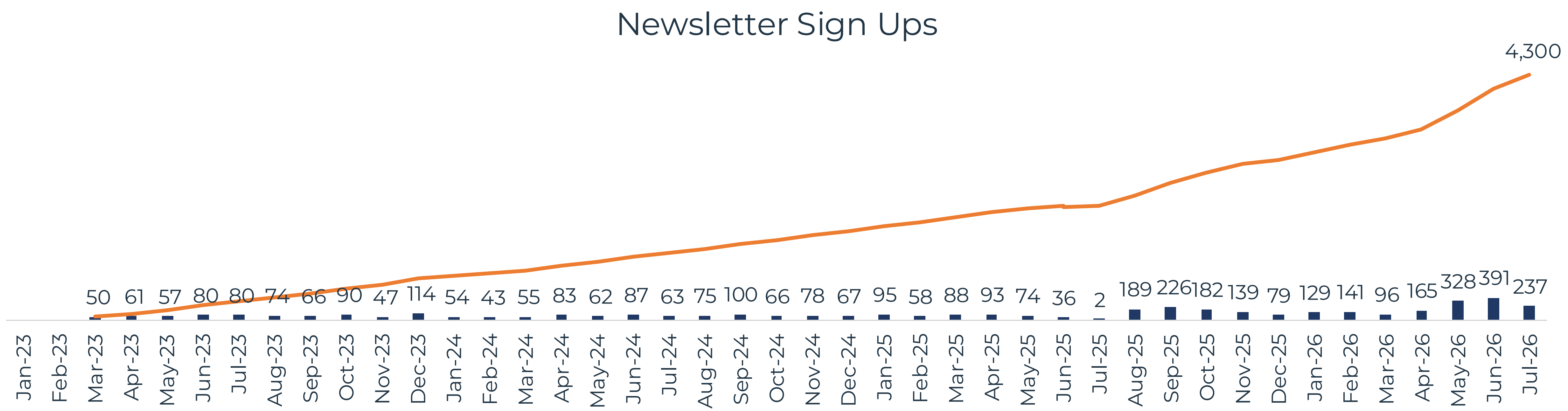


GA4 – Form Sign-Ups



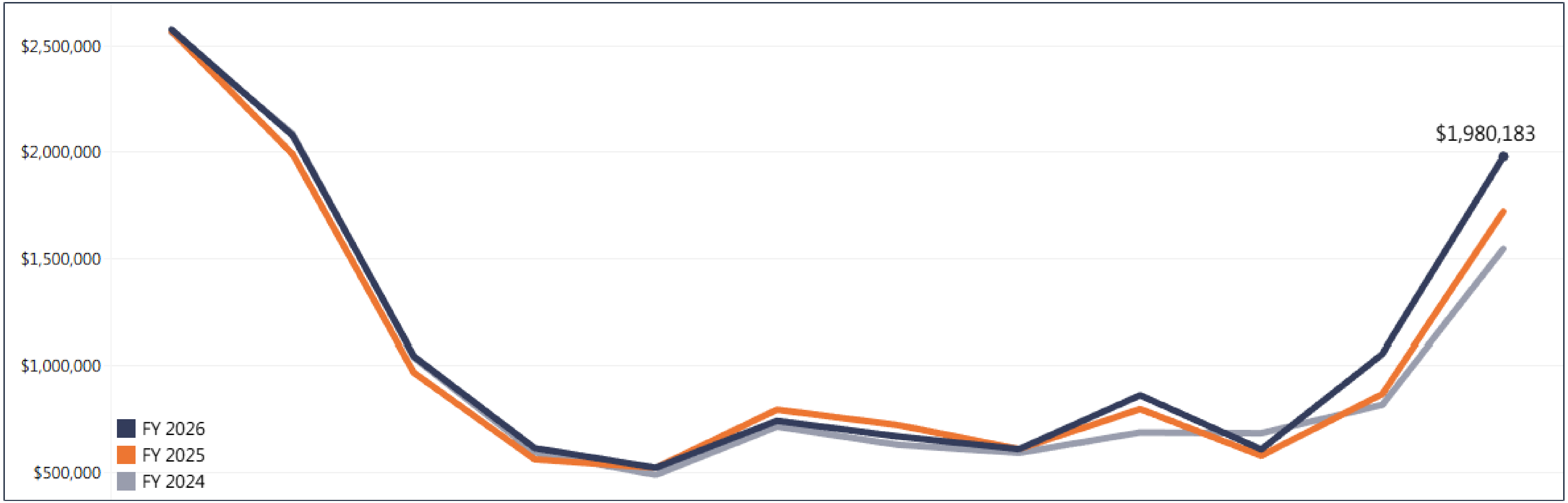


GA4 – Form Sign-Ups



Tax Data

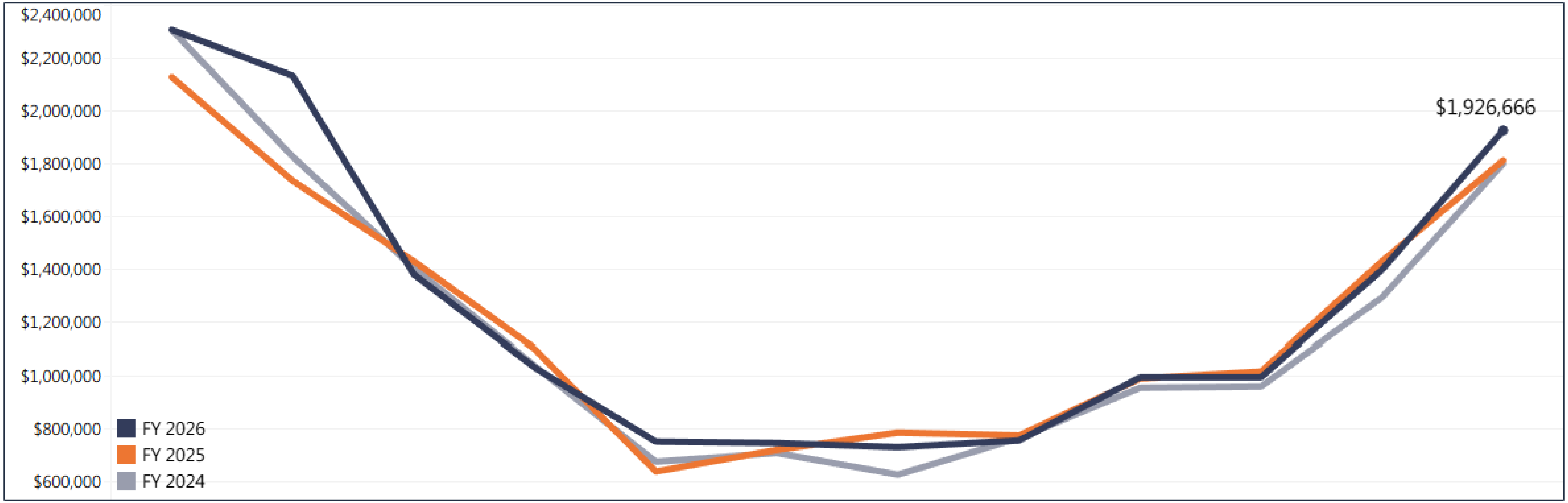
Deschutes County TRT



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Grand Total
FY 2024	$2,565,305	$2,087,111	$1,041,361	$594,840	$488,910	$715,793	$630,377	$592,725	$688,300	$685,040	$818,357	$1,547,217	$12,455,336
FY 2025	$2,569,948	$1,991,747	$970,045	$561,597	$522,630	$795,668	$723,071	$610,495	$798,731	$579,070	$869,145	$1,722,177	$12,714,324
FY 2026	$2,578,186	$2,079,664	$1,046,617	$614,620	$522,543	$743,237	$669,629	$610,215	$863,495	$608,606	$1,056,613	$1,980,183	$13,373,608

Source: Visit Central Oregon

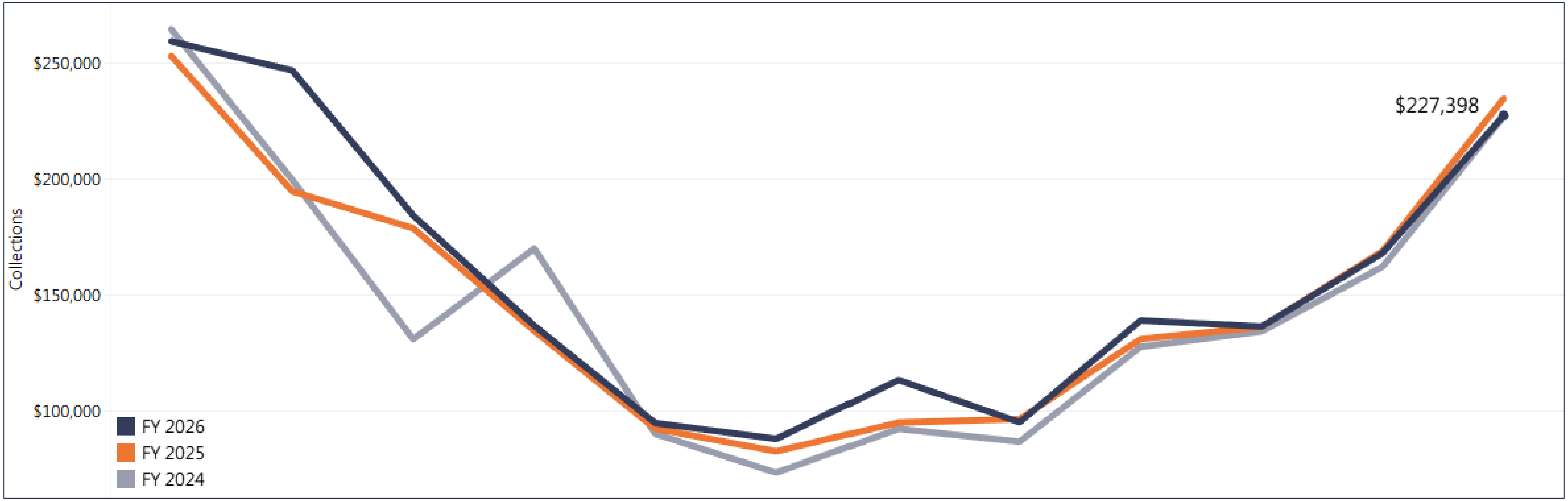
City of Bend TRT



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Grand Total
FY 2024	$2,307,659	$1,827,477	$1,405,440	$1,039,060	$677,024	$710,152	$627,949	$766,920	$957,239	$961,859	$1,295,071	$1,801,272	$14,377,122
FY 2025	$2,128,891	$1,735,905	$1,431,393	$1,102,605	$639,631	$721,839	$787,185	$776,345	$991,863	$1,018,193	$1,431,659	$1,813,139	$14,578,648
FY 2026	$2,308,157	$2,133,826	$1,381,806	$1,032,906	$753,005	$747,635	$732,125	$757,531	$996,443	$996,830	$1,399,672	$1,926,666	$15,166,602

Source: Visit Central Oregon

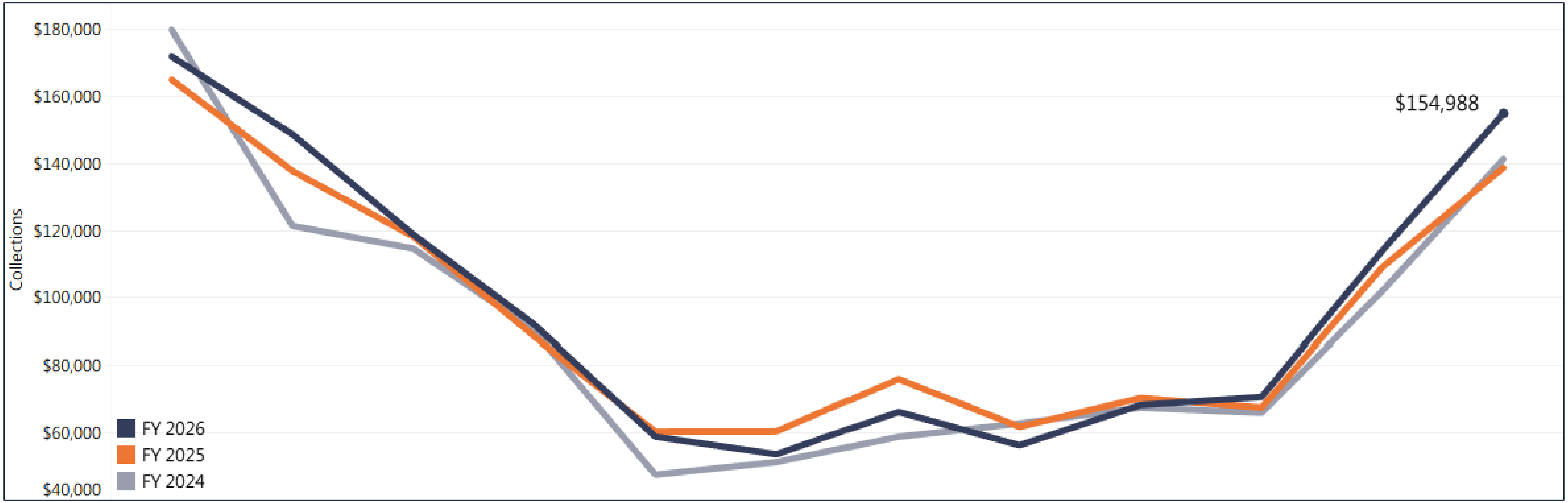
City of Redmond TRT



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Grand Total
FY 2024	$264,600	$199,705	$130,845	$170,000	$89,992	$73,232	$92,157	$86,595	$127,583	$134,233	$162,102	$226,982	$1,758,026
FY 2025	$253,085	$194,692	$178,755	$134,468	$92,210	$82,461	$94,863	$96,345	$130,936	$136,138	$168,856	$234,706	$1,797,515
FY 2026	$259,421	$246,839	$184,227	$136,685	$94,644	$87,801	$113,237	$94,981	$138,929	$136,303	$168,018	$227,398	$1,888,483

Source: Visit Central Oregon

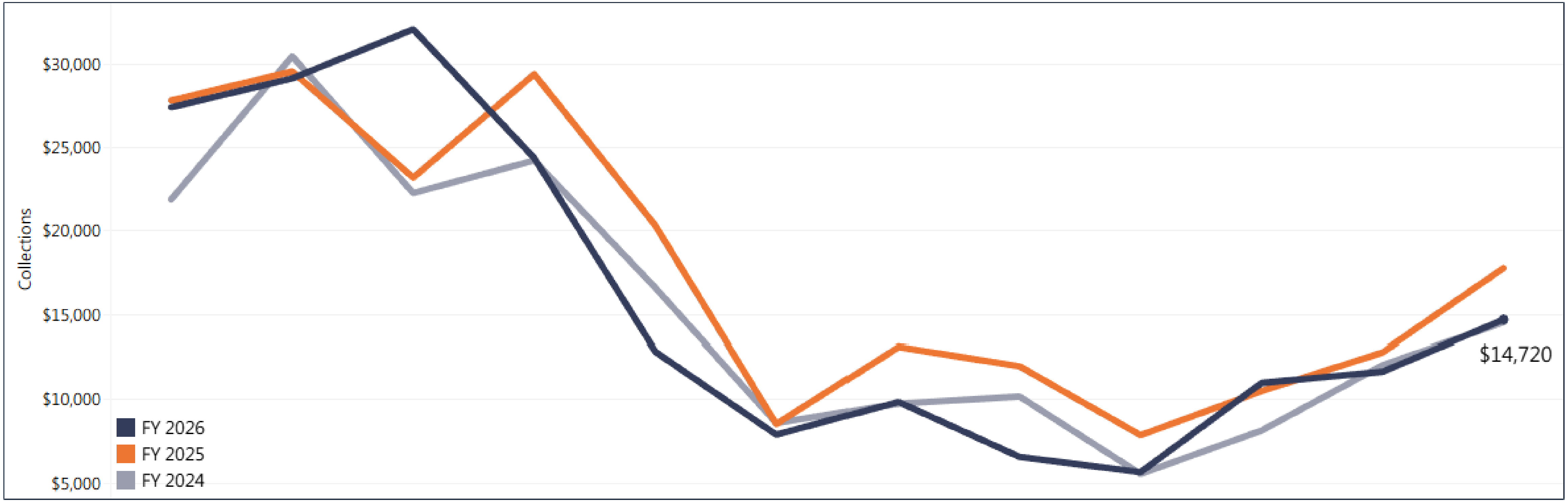
City of Sisters TRT



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Grand Total
FY 2024	$180,018	$121,391	$114,610	$90,110	$47,462	$51,226	$58,794	$62,743	$67,463	$65,962	$102,014	$141,354	$1,103,147
FY 2025	$165,094	$137,787	$118,204	$88,430	$60,310	$60,369	$76,017	$61,736	$70,371	$67,476	$109,127	$138,735	$1,153,656
FY 2026	$172,044	$148,750	$118,787	$91,926	$58,805	$53,553	$66,206	$56,231	$68,284	$70,653	$114,091	$154,988	$1,174,318

Source: Visit Central Oregon

City of La Pine TRT



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Grand Total
FY 2024	$21,901	$30,457	$22,277	$24,227	$16,621	$8,610	$9,762	$10,191	$5,564	$8,158	$12,058	$14,561	$184,387
FY 2025	$27,814	$29,543	$23,197	$29,385	$20,343	$8,548	$13,129	$11,992	$7,883	$10,520	$12,812	$17,793	$212,959
FY 2026	$27,405	$29,127	$32,067	$24,370	$12,864	$7,912	$9,865	$6,583	$5,670	$11,001	$11,667	$14,720	$193,251

Source: Visit Central Oregon

Consumer Sentiment Data

American Travel Sentiment Study Wave 109

*Survey fielded July 7-9, 2026; US National Sample of 1,000 adults 18+

American Travel Sentiment Wave 109 Highlights

Key Findings:

1. **Concerns About Gas Prices Decrease**
   Concerns about gas prices impacting travel decisions have decreased to 28%, down 11.3 points from June 2026 (40%). The percentage of travelers reducing the number of trips they're taking due to gas prices has returned to April 2026 levels (36%), a decrease of 4.2 points since June 2026 (41%).
2. **Top Leisure Travel Motivator: Spending Time with Family and Friends**
   The top motivator for leisure travel is to spend time with family and friends (39%), up 7.7 points from August 2025. Rest and relaxation is also a top motivator, with two in ten travelers (19%) selecting it as their primary motivation.
3. **AI in the Trip Planning Process**
   Four in ten travelers (41%) are likely to use AI in their trip planning process, up 6.3 points from August 2024 (34%). Three in ten (28%) report having used AI to plan a recent trip, a 9.0-point increase from August 2024. Of those who have used AI to plan a recent trip, half (54%) used it to find attractions and activities.

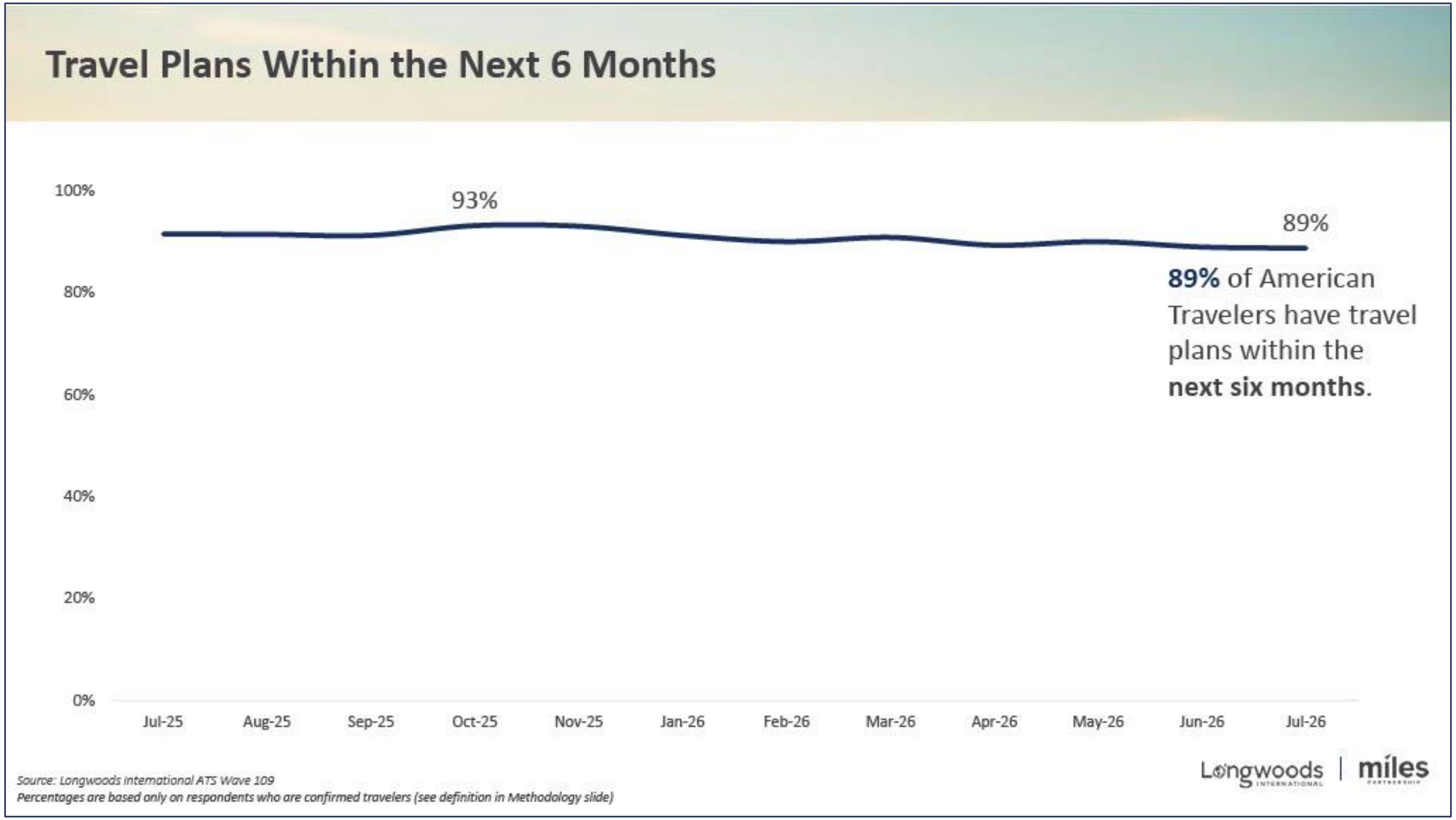
Source: Longwoods International ATS Wave 109

Longwoods International | miles partnership

Source: Longwoods International

American Travel Sentiment Study Wave 109

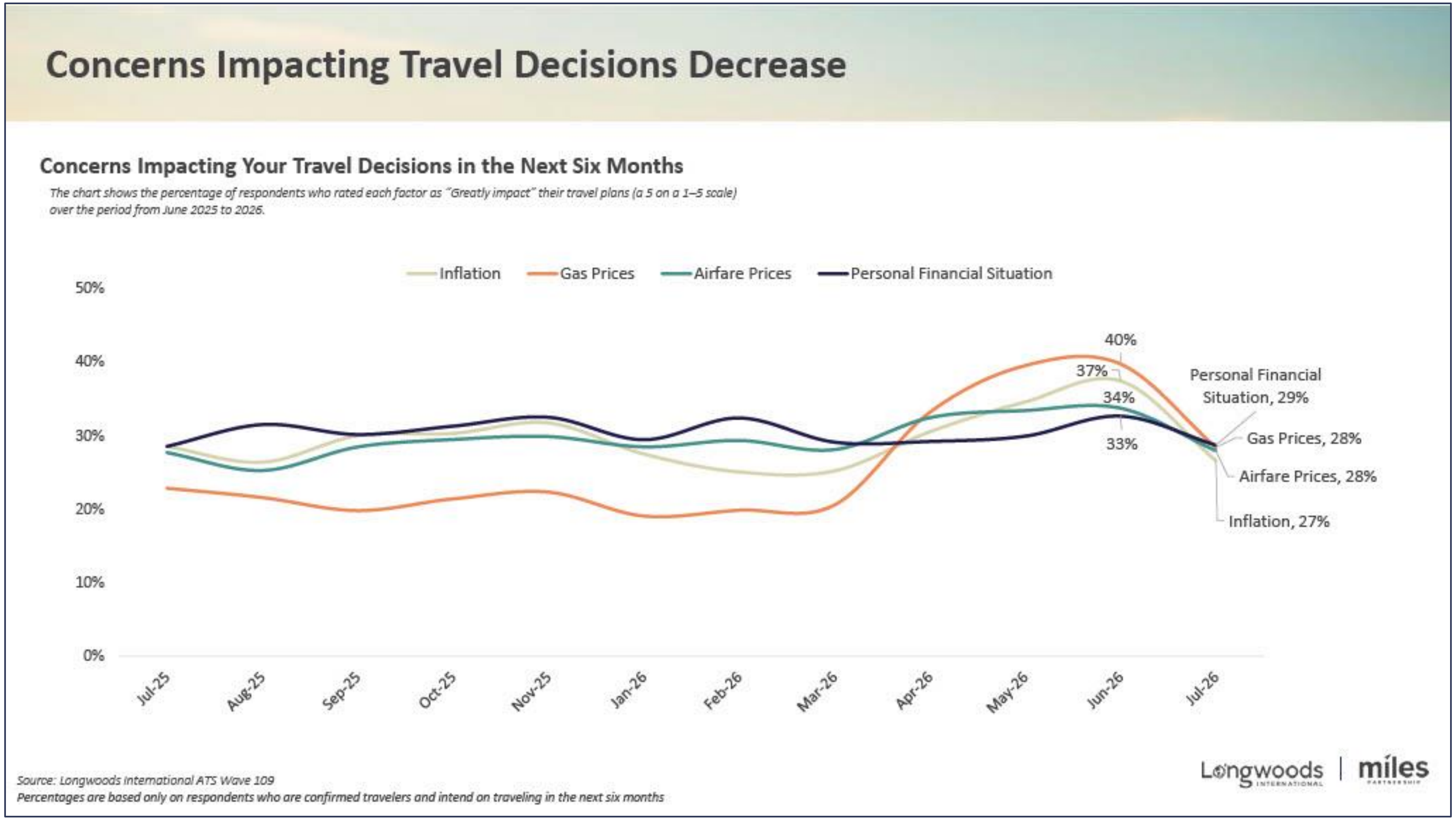
*Survey fielded July 7-9, 2026; US National Sample of 1,000 adults 18+



Source: Longwoods International

American Travel Sentiment Study Wave 109

*Survey fielded July 7-9, 2026; US National Sample of 1,000 adults 18+



Source: Longwoods International

American Travel Sentiment Study Wave 109

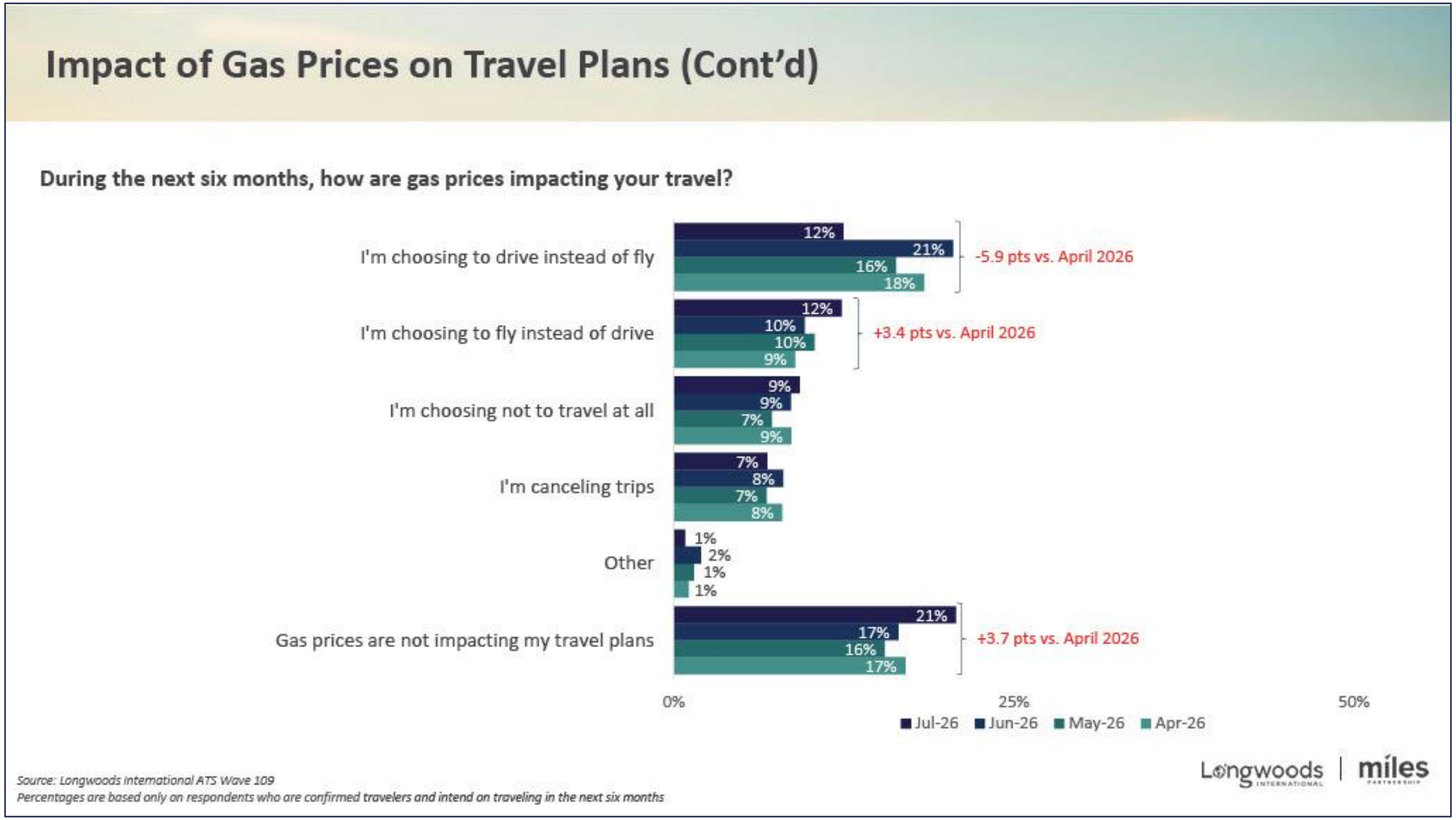
CENTRAL OREGON

*Survey fielded July 7-9, 2026; US National Sample of 1,000 adults 18+

Source: Longwoods International

American Travel Sentiment Study Wave 109

*Survey fielded July 7-9, 2026; US National Sample of 1,000 adults 18+

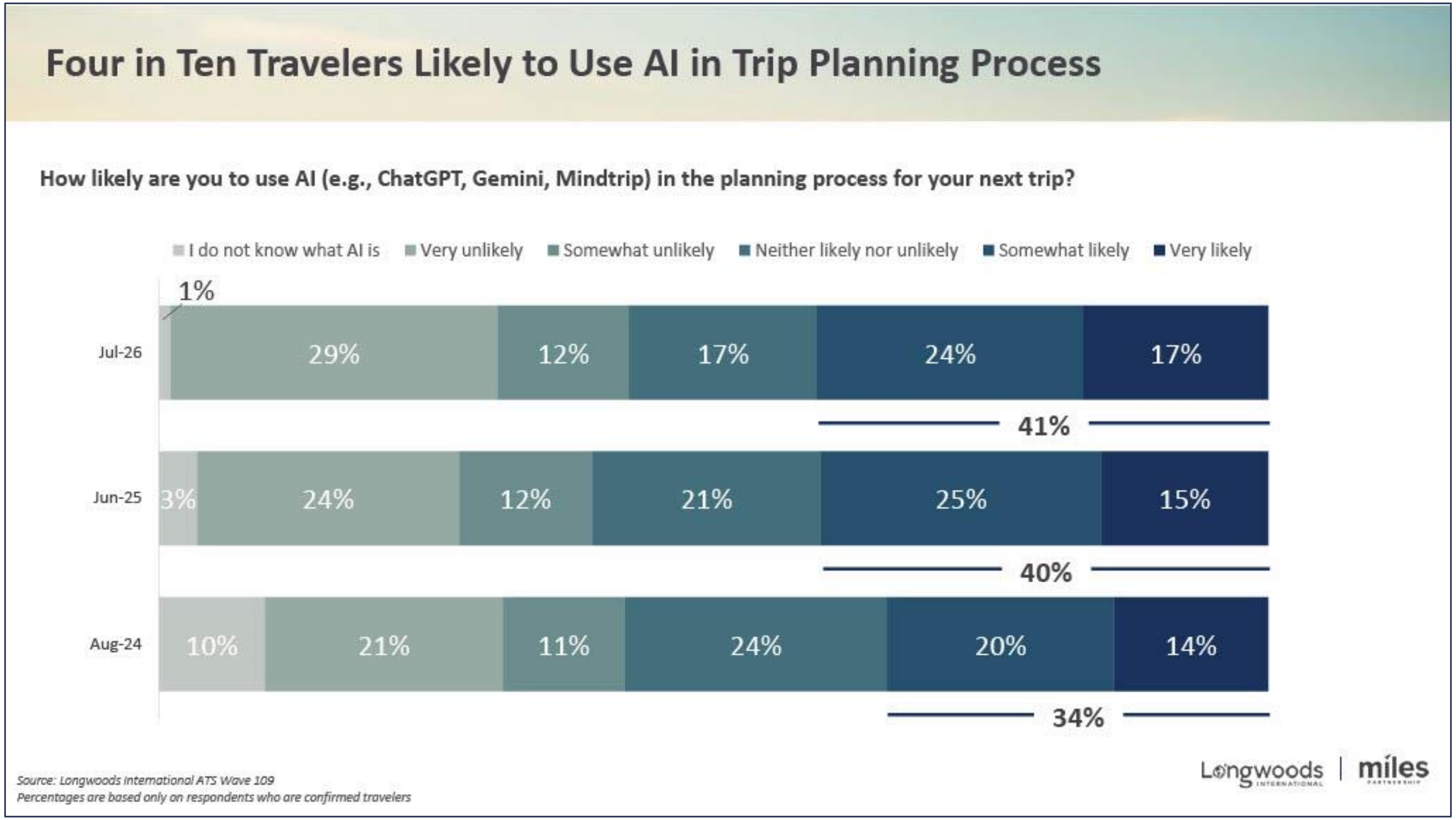


Source: Longwoods International

American Travel Sentiment Study Wave 109

CENTRAL OREGON

*Survey fielded July 7-9, 2026; US National Sample of 1,000 adults 18+



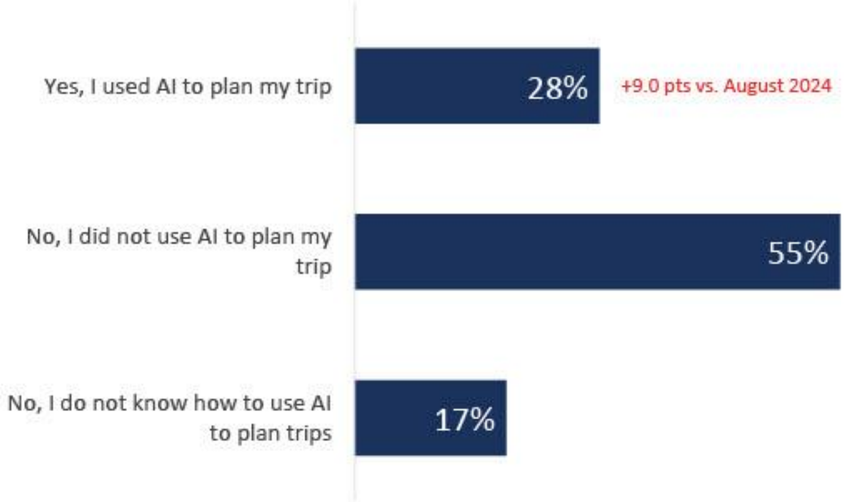
Source: Longwoods International

American Travel Sentiment Study Wave 109

*Survey fielded July 7-9, 2026; US National Sample of 1,000 adults 18+

Three in Ten Travelers Used AI to Plan a Recent Trip

In the last six months, have you used AI (e.g., ChatGPT, Gemini, Mindtrip) to help plan your trip?



28% of travelers **used AI to plan a recent trip**, up 9.0 points since August 2024 (19%). Only **17% do not know how to use AI to plan trips**.

Source: Longwoods International ATS Wave 109
Percentages are based only on respondents who are confirmed travelers and have taken a trip in the last six months

Longwoods International | miles

Source: Longwoods International

American Travel Sentiment Study Wave 109

*Survey fielded July 7-9, 2026; US National Sample of 1,000 adults 18+

American Travel Sentiment Methodology

The American National Travel Sentiment Study is the most comprehensive and longest-running survey of its kind, offering valuable insights into the factors influencing American travel behaviors.

Key Details:
- Survey Date: July 7 – 9, 2026
- Sample Size: 1,000 U.S. adults (18+)
- Margin of Error: ±3%
- Representative of U.S. population demographics (age, gender, region)

Travelers are only respondents that have taken a trip in the last 3 years and intend to take a trip in the next 2 years.

Conducted with support from Miles Partnership, this study remains a vital tool for understanding the dynamic landscape of American travel.

Longwoods | miles

Source: Longwoods International

Canadian Travel Sentiment Study Wave 6

*Survey fielded July 9-14, 2026; Canadian National Sample of 1,000 adults 18+

Key Highlights

- **Recent Travel Activity Improves Year-Over-Year**
  28% of Canadian travelers visited the U.S. in the last 6 months, up from 23% in July 2025, while 51% did not travel and had no intent, down from 60%.
- **Intent to Travel to the U.S. Increases from April 2026**
  49% intend to visit in the next 12 months, up from 43% in April 2026. 37% have not yet booked their travel and 12% have already done so.
- **U.S. Policy Deterrence Declines as No Influence on Travel Plan Rises**
  56% say U.S. policies make them less likely to travel, down from 63% in July 2025, while 25% say policies have no influence, up from 18% in July 2025.
- **Switching to Other International Destinations Declines While Domestic Substitution Remains the Top Alternative**
  Only 16% would switch to an international destination other than U.S., down from 25% in April 2026, while 37% would replace a U.S. trip with a domestic trip, down from 42% in July 2025.
- **Avoidance of Certain U.S. Areas Increases**
  19% of policy-concerned travelers say they will alter their itinerary to avoid certain U.S. areas, up from 11% in January 2026.
- **Recognition of U.S. Attractions Peaks While Safety Concerns Persist**
  Agreement that the U.S. has "lots to see and do" reached a study-period high of 91%, while only 37% agree the U.S. is a safe place to visit.

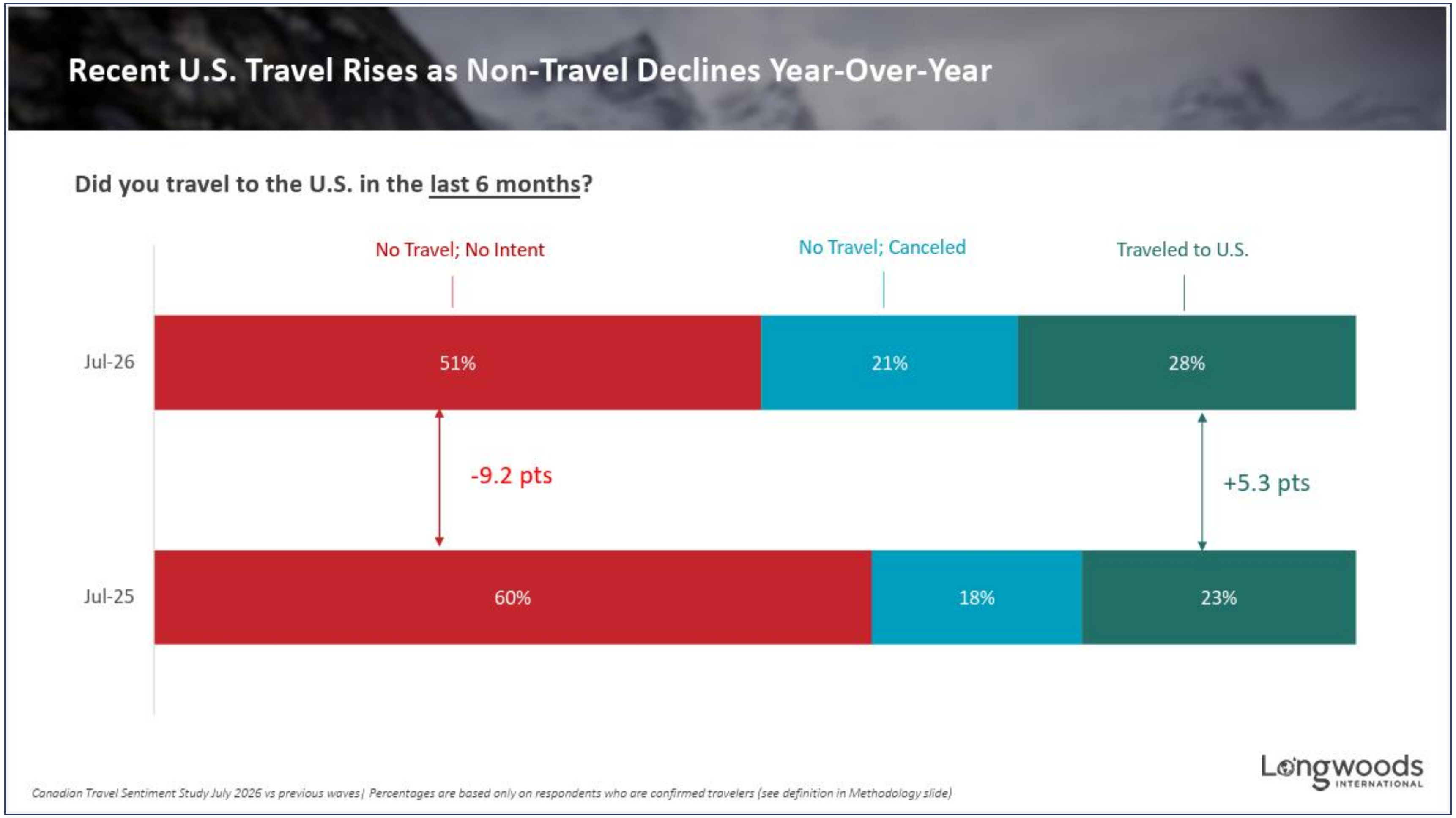
Longwoods INTERNATIONAL

Canadian Travel Sentiment Study July 2026

Source: Longwoods International

Canadian Travel Sentiment Study Wave 6

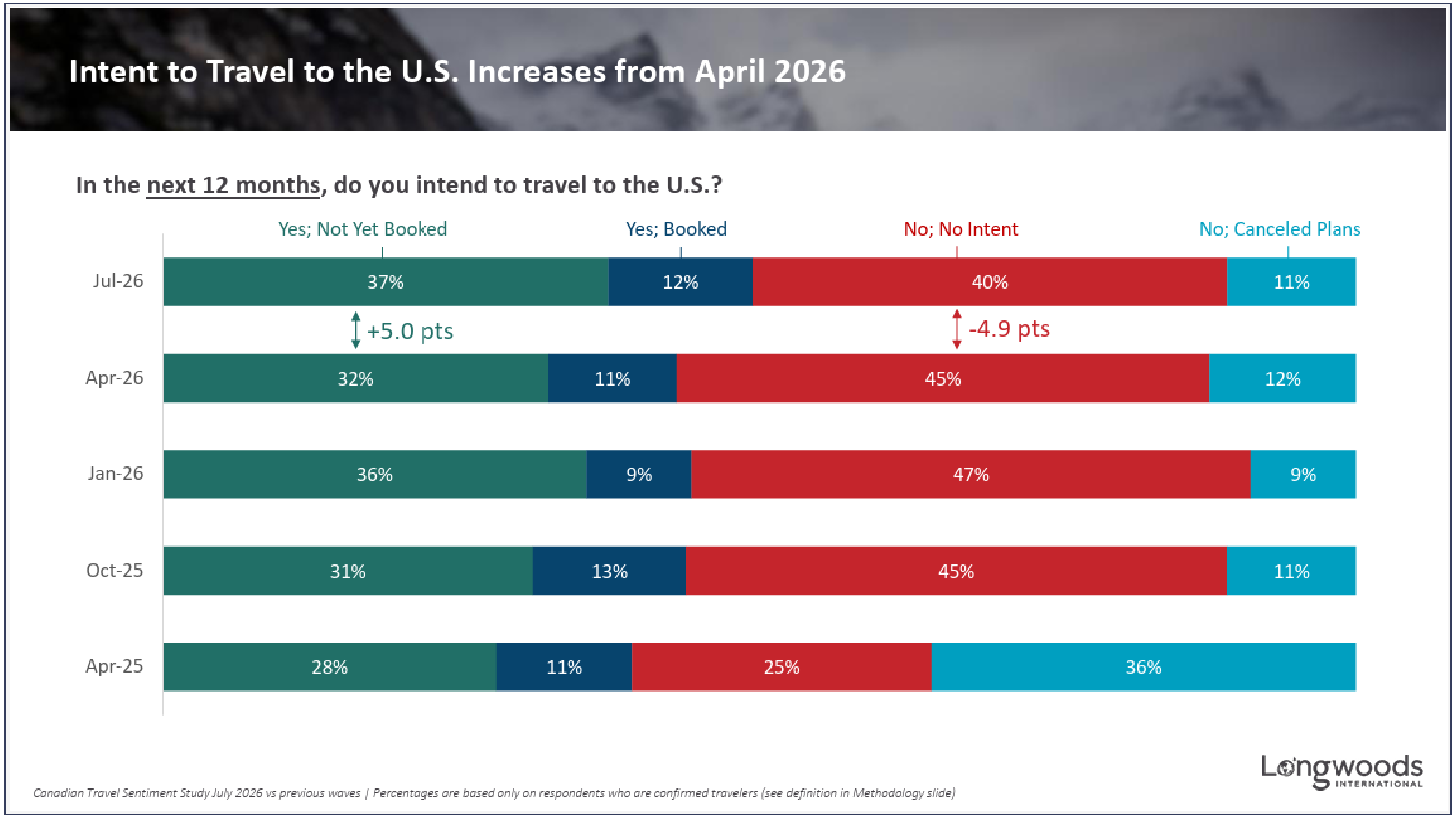
*Survey fielded July 9-14, 2026; Canadian National Sample of 1,000 adults 18+



Source: Longwoods International

Canadian Travel Sentiment Study Wave 6

*Survey fielded July 9-14, 2026; Canadian National Sample of 1,000 adults 18+



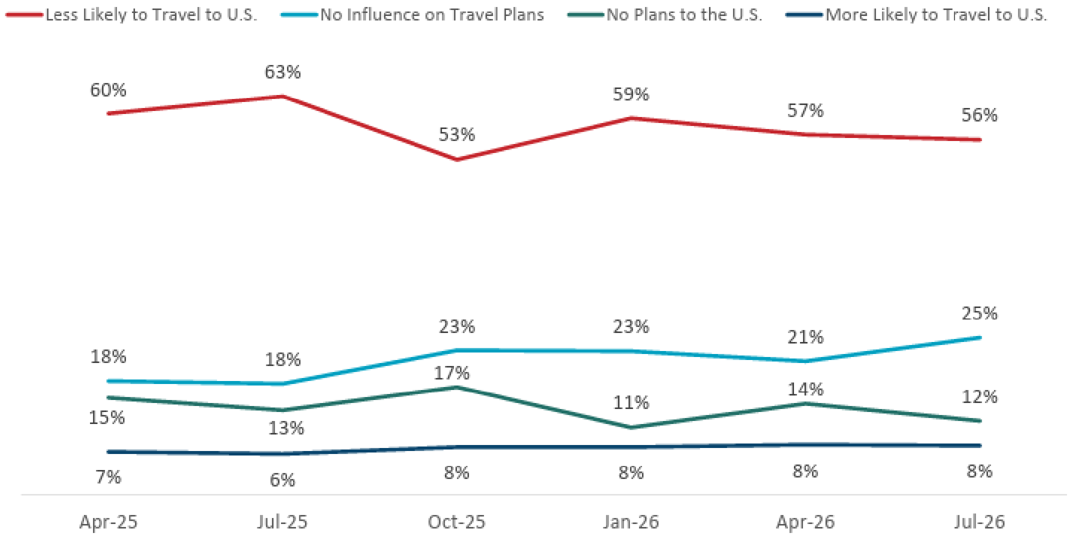
Source: Longwoods International

Canadian Travel Sentiment Study Wave 6

*Survey fielded July 9-14, 2026; Canadian National Sample of 1,000 adults 18+

U.S. Policy Deterrence Declines from July 2025 as No Influence on Travel Plan Rises

Are current U.S. Government policies, trade practices, and/or political statements influencing you to change your travel plans to the U.S. in the next 12 months?



Compared with July 2025, the share of Canadian travelers who say U.S. policies make them **less likely to travel declined from 63% to 56%,** while the share saying policies have **no influence increased from 18% to 25%.**

Longwoods International

Canadian Travel Sentiment Study July 2026 vs previous waves | Percentages are based only on respondents who are confirmed travelers (see definition in Methodology slide)

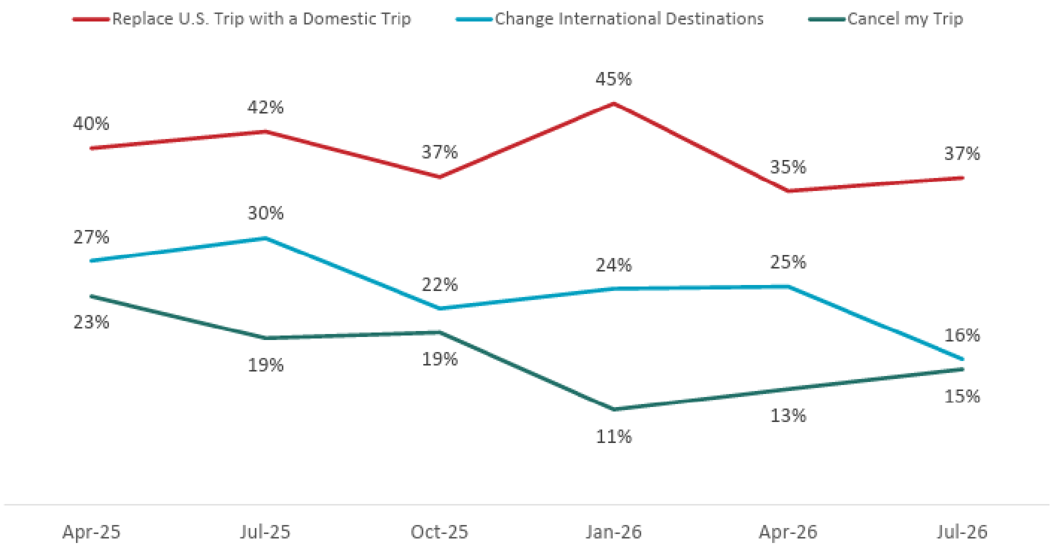
Source: Longwoods International

Canadian Travel Sentiment Study Wave 6

*Survey fielded July 9-14, 2026; Canadian National Sample of 1,000 adults 18+

Shift to International Destinations Falls from April 2026

For respondents shifting away from U.S. travel: You indicated that the current U.S. government policies are influencing your travel plans to the U.S., how will you change your travel plans to the U.S. in the next 12 months?



Only 16% of affected travelers say they will switch to another international destination, down from 25% in April 2026. Domestic replacement remains the **top alternative at 37%,** while **15% say they will cancel their trip**.

Canadian Travel Sentiment Study July 2026 vs previous waves | Percentages are based only on respondents who are confirmed travelers and indicated U.S. policies and politics are influencing their travel plans

Longwoods International

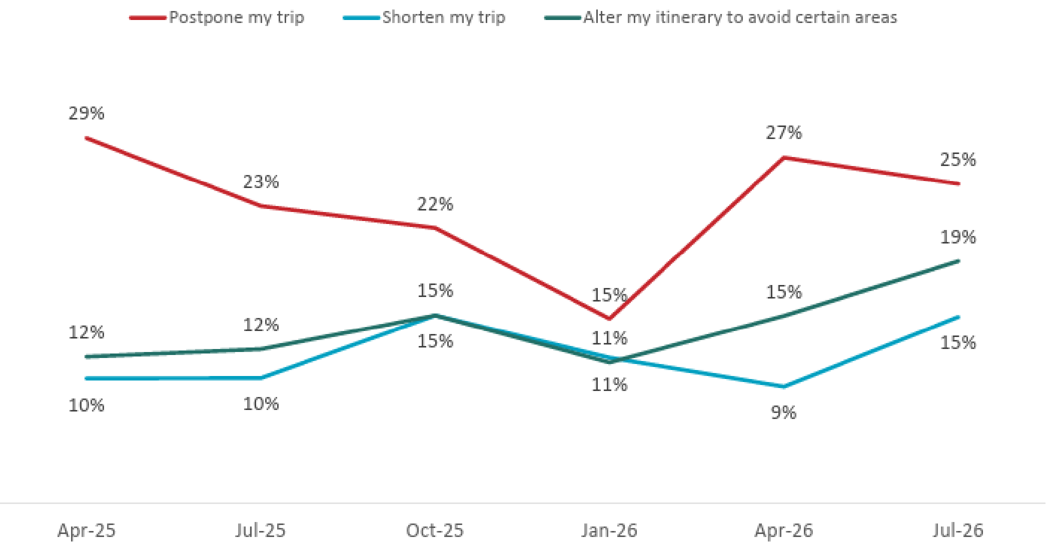
Source: Longwoods International

Canadian Travel Sentiment Study Wave 6

*Survey fielded July 9-14, 2026; Canadian National Sample of 1,000 adults 18+

Avoidance of Certain U.S. Areas Reaches 19% Among Policy-Concerned Travelers

For respondents modifying but maintaining U.S. Travel: You indicated that the current U.S. government policies are influencing your travel plans to the U.S., how will you change your travel plans to the U.S. in the next 12 months?



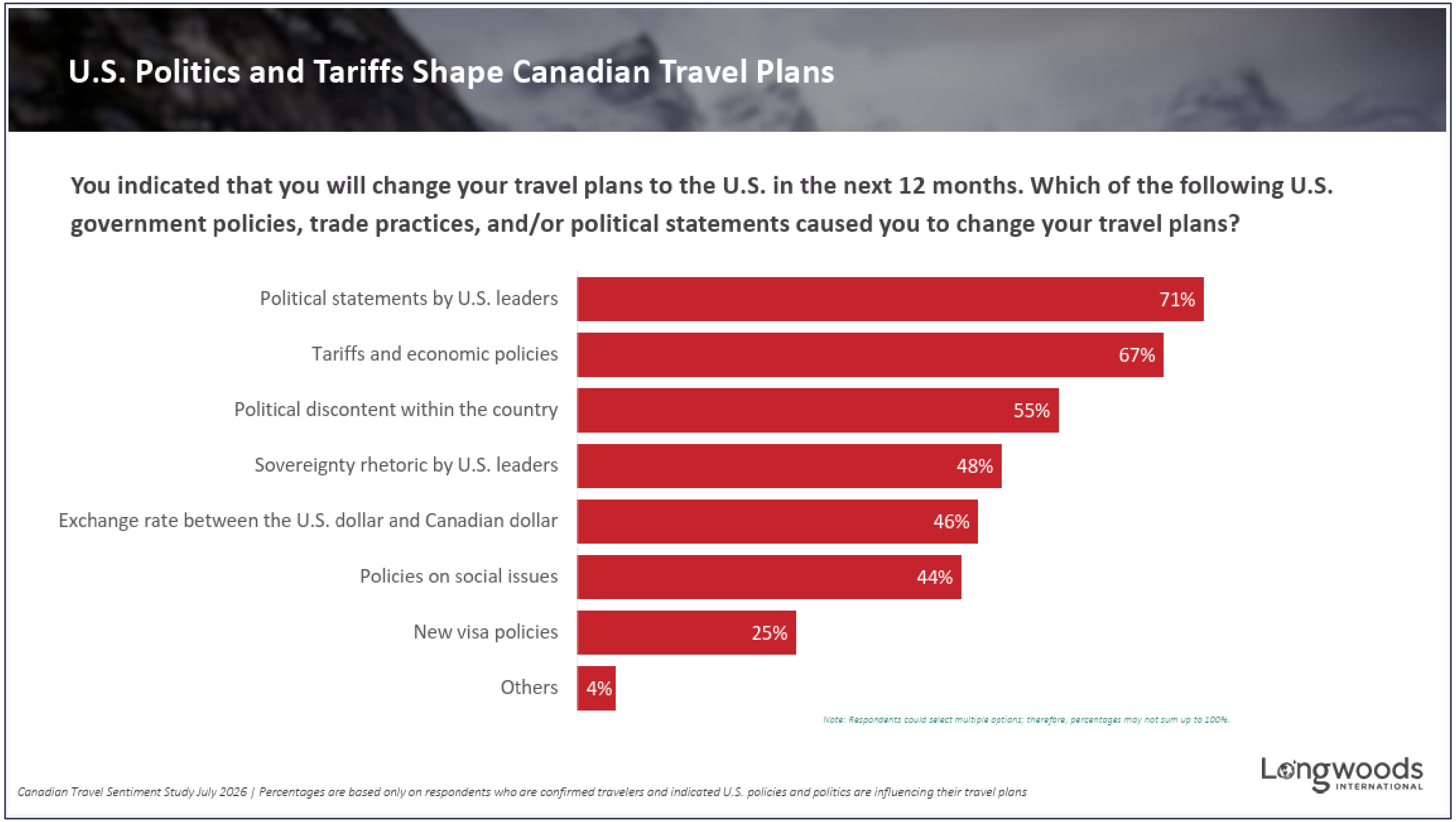
Among policy-concerned travelers, **avoidance of certain U.S. areas continued to increase to 19%** from **11%** in January 2026, an 8.0-point increase.

Canadian Travel Sentiment Study July 2026 vs previous waves | Percentages are based only on respondents who are confirmed travelers and indicated U.S. policies and politics are influencing their travel plans

Source: Longwoods International

Canadian Travel Sentiment Study Wave 6

*Survey fielded July 9-14, 2026; Canadian National Sample of 1,000 adults 18+



Source: Longwoods International

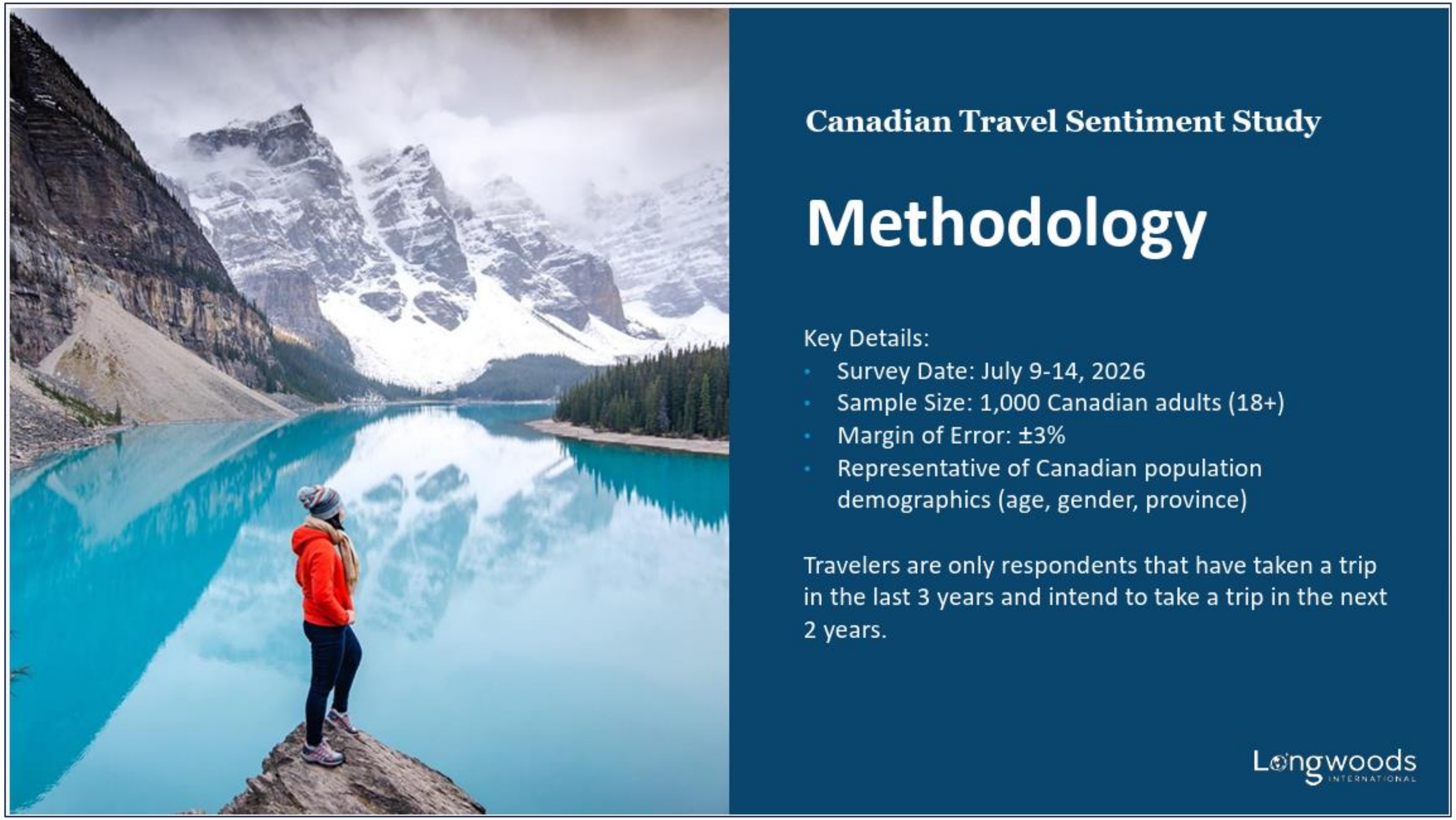
Canadian Travel Sentiment Study Wave 6

*Survey fielded July 9-14, 2026; Canadian National Sample of 1,000 adults 18+

Source: Longwoods International

Canadian Travel Sentiment Study Wave 6

*Survey fielded July 9-14, 2026; Canadian National Sample of 1,000 adults 18+



Source: Longwoods International

VISIT CENTRAL OREGON

BLUE ROOM RESEARCH