Visit McMinnville

Research Insights
May 28, 2024

THE CURRENT SITUATION: CONFLICTING SIGNALS

Nationally:
- Inflation is sticky, which has led the Fed to keep interest rates higher for longer, which dampens economic growth…..AND….corporate earnings are strong, and the stock market (Dow/S&P/Nasdaq) is at an all time high….BUT…
- Concerns about inflation and personal finances remain elevated and consumer confidence is declining….AND….consumers are spending more on travel than they ever have, and travel demand remains healthy

In McMinnville:
- Hotel Occupancy has declined Year-over-Year for 15 straight months….AND….Average Daily Rate continues to hit all time highs and Revenue is healthy….BUT….
- Short term rental Supply continues to grow….AND….short term rental Occupancy and Average Daily Rate are keeping up with the pace

Smith Travel Research
Hotel Data

STR HOTEL DATA – OREGON LODGING STATISTICS (YEAR-TO-DATE)

OREGON LODGING STATISTICS
Year To Date (YTD): January - April 2024

Region	Occupancy (%) YTD	Occupancy (%) % Chg YOY	Room Rate ($) YTD	Room Rate ($) % Chg YOY	RevPAR ($) YTD	RevPAR ($) % Chg YOY	Room Supply YTD	Room Supply % Chg YOY	Room Demand YTD	Room Demand % Chg YOY	Room Revenue ($) YTD	Room Revenue ($) % Chg YOY
United States	59.9	-1.2%	$155.75	1.8%	$93.33	0.6%	671,594,002	0.6%	402,417,002	-0.6%	$62,676,617,441	1.2%
Pacific	62.9	-1.4%	$189.69	-0.6%	$119.27	-2.0%	98,257,566	0.9%	61,782,001	-0.5%	$11,719,131,835	-1.1%
Statewide	53.7	-0.3%	$125.38	0.9%	$67.37	0.6%	8,443,349	-0.4%	4,536,890	-0.7%	$568,831,921	0.2%
Central	49.2	-4.2%	$123.17	1.2%	$60.61	-3.0%	721,927	0.8%	355,260	-3.4%	$43,757,479	-2.3%
Coast	48.8	-2.4%	$134.42	-0.7%	$65.60	-3.1%	1,353,162	-1.6%	660,344	-4.0%	$88,764,619	-4.6%
Eastern	45.1	-4.6%	$98.87	1.7%	$44.63	-3.0%	611,280	-0.4%	275,903	-5.0%	$27,278,419	-3.3%
Mt. Hood/Gorge	55.0	-0.8%	$121.87	1.1%	$66.97	0.3%	270,480	-1.1%	148,629	-1.9%	$18,113,023	-0.9%
Portland	58.9	1.8%	$131.13	0.0%	$77.18	1.8%	3,226,509	0.2%	1,899,000	2.0%	$249,006,476	2.0%
Southern	49.0	-0.9%	$99.38	-0.5%	$48.67	-1.5%	1,035,240	0.1%	506,988	-0.9%	$50,384,344	-1.4%
Willamette Valley	57.8	1.1%	$126.85	4.0%	$73.29	5.1%	1,257,511	-1.9%	726,492	-0.8%	$92,156,743	3.1%

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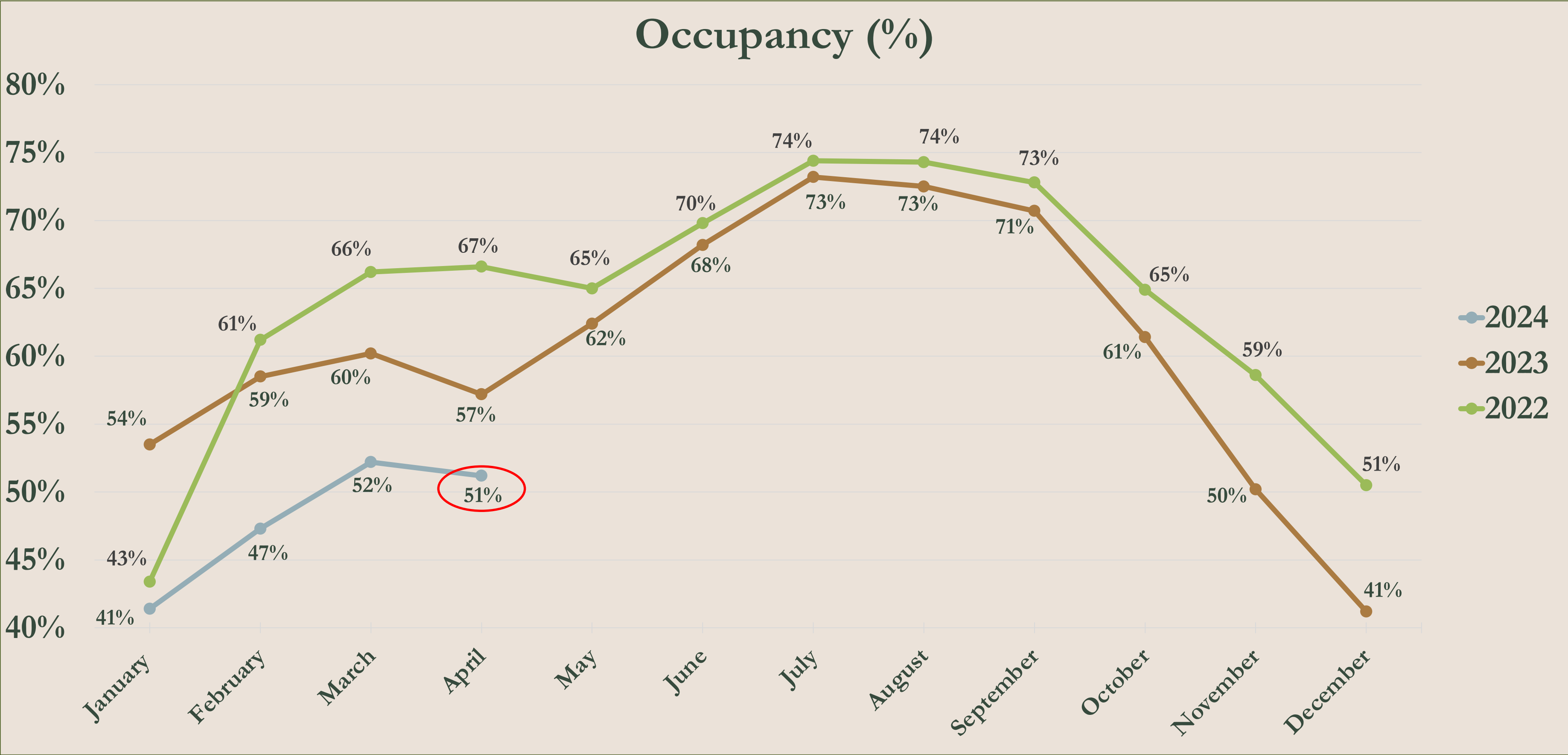| Region	Occupancy (%) YTD	% Chg YOY	Room Rate ($) YTD	% Chg YOY	RevPAR ($) YTD	% Chg YOY	Room Supply YTD	% Chg YOY	Room Demand YTD	% Chg YOY	Room Revenue ($) YTD	% Chg YOY
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HOTEL OCCUPANCY BY MONTH

Occupancy (%)

	2024	2023	2022
January	41%	54%	43%
February	47%	59%	61%
March	52%	60%	66%
April	51%	57%	67%
May		62%	65%
June		68%	70%
July		73%	74%
August		73%	74%
September		71%	73%
October		61%	65%
November		50%	59%
December		41%	51%

2022 Occupancy = 64.0%   2023 Occupancy = 60.8%

Source: STR

HOTEL AVERAGE DAILY RATE BY MONTH

Average Daily Rate ($)

2024 | 2023 | 2022

	January	February	March	April	May	June	July	August	September	October	November	December
2024	$133	$142	$151	$156								
2023	$127	$137	$138	$157	$153	$177	$184	$186	$184	$161	$150	$137
2022	$111	$123	$128	$144	$155	$173	$179	$177	$176	$160	$143	$132
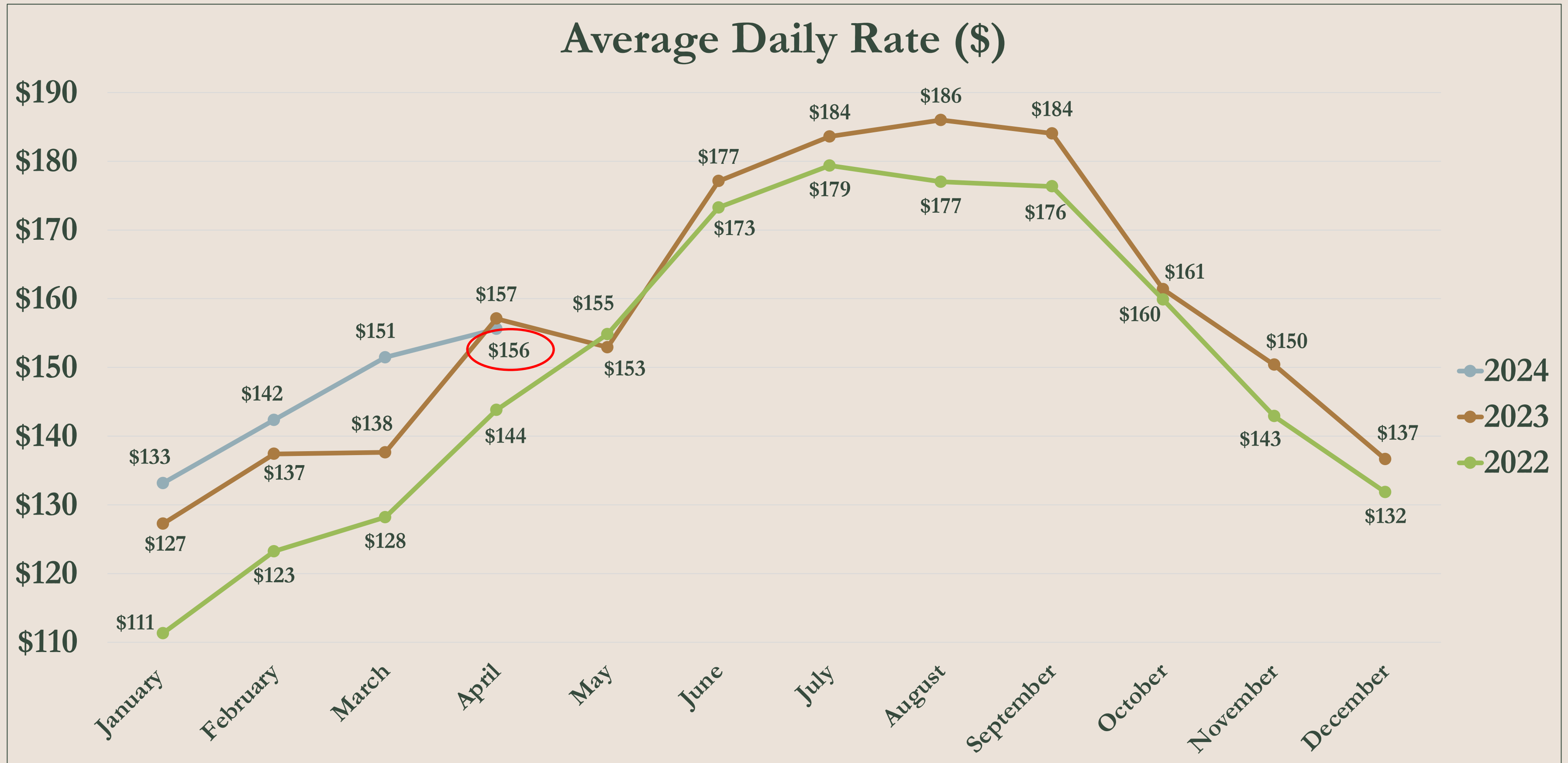
2022 ADR = $153.15   **2023 ADR = $160.20**

Source: STR

HOTEL DEMAND (ROOMS SOLD) BY MONTH

Demand (Rooms Sold)

Month	2022	2023	2024
January		6,116	4,733
February	6,049		4,889
March	6,887		5,974
April	7,272	6,336	5,664
May	7,133		
June	7,547		
July	8,368		
August	8,295		
September	7,825		
October	7,027		
November		5,562	
December	4,710		
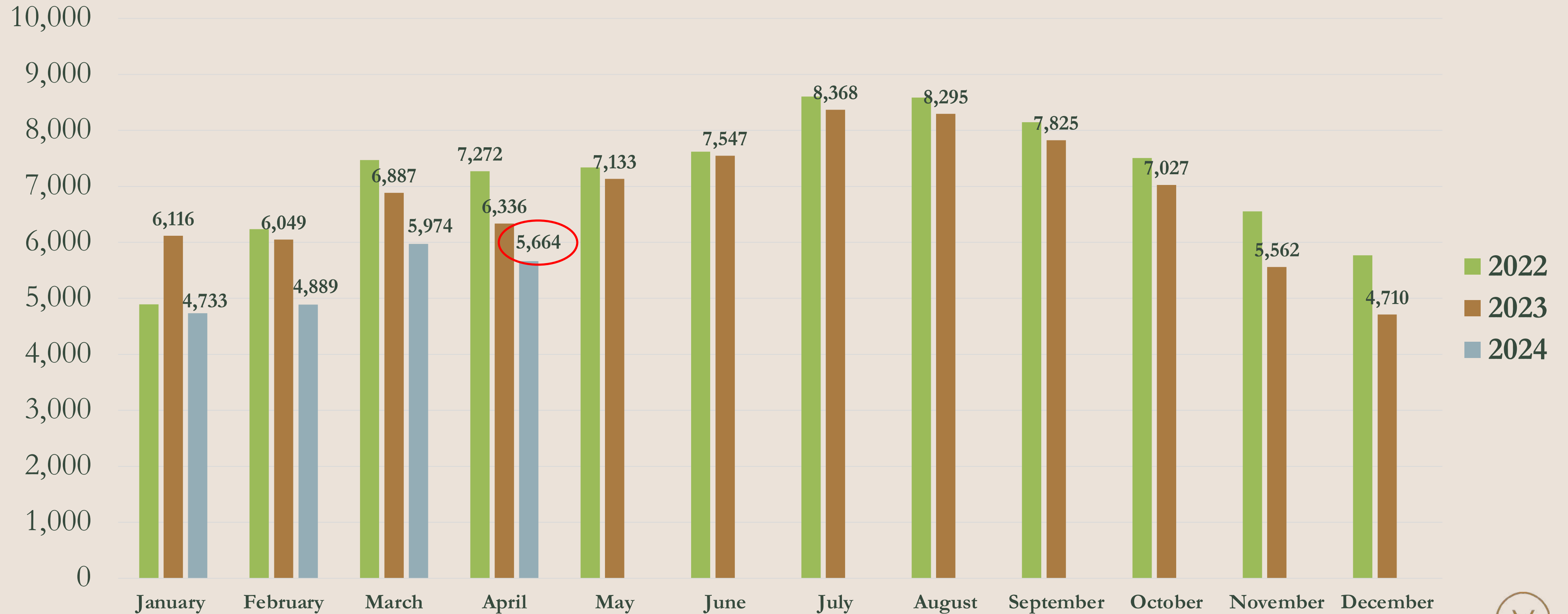
2022 Demand = 85,998 Rooms　　**2023 Demand = 81,855 Rooms**

HOTEL REVENUE BY MONTH

Revenue ($)

Year	Color
2024	(blue)
2023	(brown)
2022	(green)

2024 (blue): January $630,234 · February $695,993 · March $904,821 · April $881,261

2023 (brown): January $778,231 · February $831,131 · March $947,921 · April $995,316 · May $1,090,840 · June $1,320,272 · July $1,543,535 · August $1,542,896 · September $1,436,877 · October $1,133,852 · November $836,468 · December $643,601

2022 (green): January $544,552 · February $768,358 · March $957,427 · April $1,045,706 · May $1,136,360 · June $1,336,734 · July $1,536,306 · August $1,519,951 · September $1,440,238 · October $1,199,833 · November $936,840 · December $760,811

2022 Revenue = $13.2 Million   **2023 Revenue = $13.1 Million**

Source: STR

VM

AirDNA Short Term Rental Data

(Airbnb & Vrbo listings)

AIRDNA SHORT TERM RENTAL DATA – TOTAL ACTIVE LISTINGS

Total Active Listings
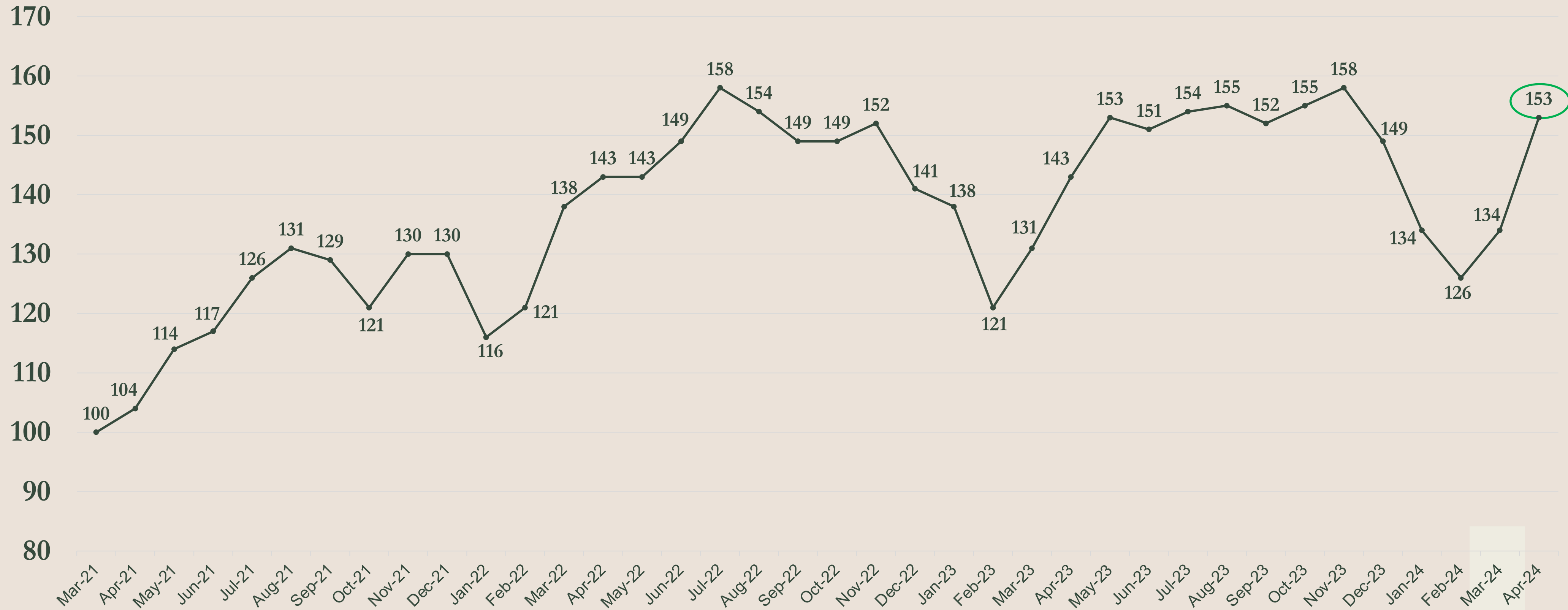
AIRDNA SHORT TERM RENTAL DATA – AVAILABLE LISTINGS UNIT SIZE

Current Available Listings Unit Size

Source: AirDNA

AIRDNA SHORT TERM RENTAL DATA – OCCUPANCY (%)

Occupancy (%)

Month	2024	2023	2022
January	29%	38%	37%
February	36%	42%	46%
March	41%	45%	50%
April	47%	50%	55%
May		54%	57%
June		59%	63%
July		74%	74%
August		54%	69%
September		67%	70%
October		58%	60%
November		45%	48%
December		33%	42%

Source: AirDNA
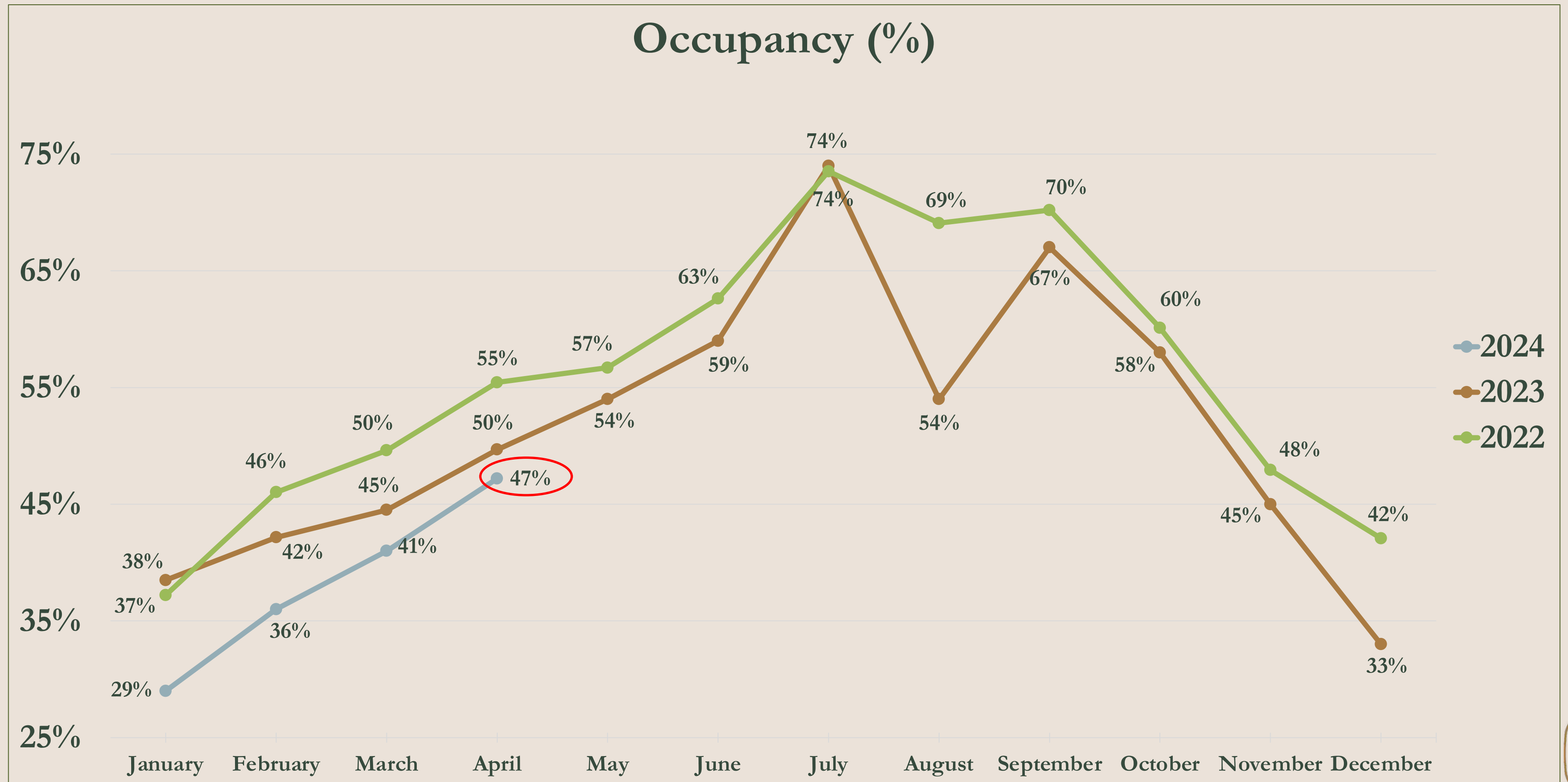
AIRDNA SHORT TERM RENTAL DATA – AVERAGE DAILY RATE ($)

Average Daily Rate ($)

Legend:
- 2024
- 2023
- 2022

2024: January $255, February $271, March $269, April $275

2023: January $239, February $242, March $244, April $258, May $270, June $281, July $305, August $298, September $300, October $282, November $261, December $250

2022: January $226, February $235, March $246, April $254, May $286, June $315, July $304, August $303, September $320, October $298, November $270, December $251

Visit McMinnville

BLUE ROOM RESEARCH

• 2025 •

ANNUAL CITY COUNCIL

Budget Review

Visit
McMinnville

Founding: Vision, Mission, & Values
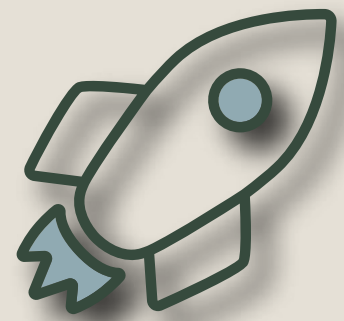
Mission

Guide the development of McMinnville as a year-round destination, responsibly promote its assets, and enrich the visitor experience while supporting livability for locals.

Vision

Cultivate the visitor economy in McMinnville to enhance quality of life for our community.

Values

• Develop and nurture collaborative partnerships.

• Embrace innovation and possibility.

• Operate transparently, inclusively, and equitably.

• Honor community.

Visit McMinnville

What is economic development & why do we need it?

Economic development is the creation of **wealth** from which community **benefits** are realized. It's an **investment** in developing economic growth to enhance the prosperity and quality of life for **all residents**.

Foundational goals and strategies
Are meant to be broadly beneficial across multiple industry sectors

- Accelerate growth in living-wage jobs across balanced array of industry sectors. (MAC-Town: Goal One)

- Improve systems for economic mobility and inclusion. (MAC-Town: Goal Two)

- Maintain and enhance our high quality of life. (MAC-Town: Goal Three)

Target sector goals and strategies
Are intended to pursue opportunities and improve Outcomes within clusters or sectors of related industries

- Sustain and innovate within traditional industry and advanced manufacturing. (MAC-Town: Goal Four)

- Foster opportunity in technology and entrepreneurship. (MAC-Town: Goal Five)

- Be a leader in hospitality and place-based tourism. (MAC-Town: Goal Six)

- Align and cultivate opportunities in craft beverage and food systems. (MAC-Town: Goal Seven)

- Proactively assist growth in education, medicine and other sciences. (MAC-Town: Goal Eight)

Pillars of Sustainable Operation

Economic Development

Identity

Stewardship
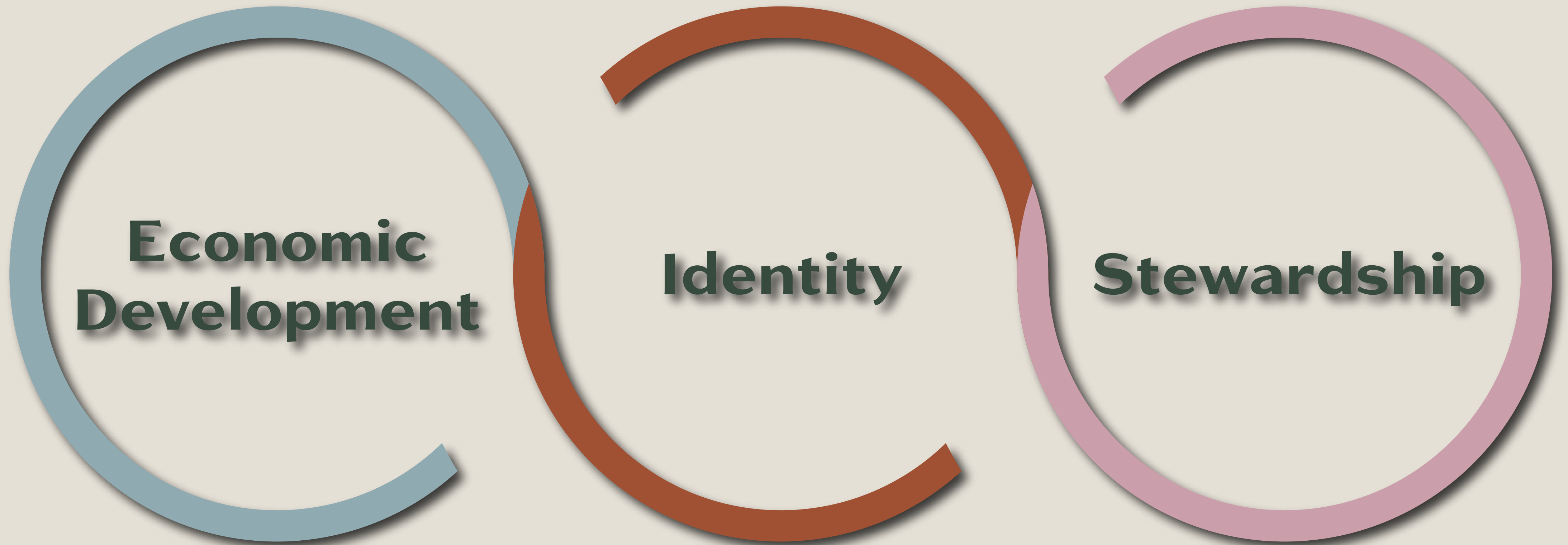
Destination Development Priorities *(to date)*

PRIORITIES

- ☑ **Stewardship**
- ☑ **Destination Diversification**
- ☑ **Accessibility**

Development Tactics
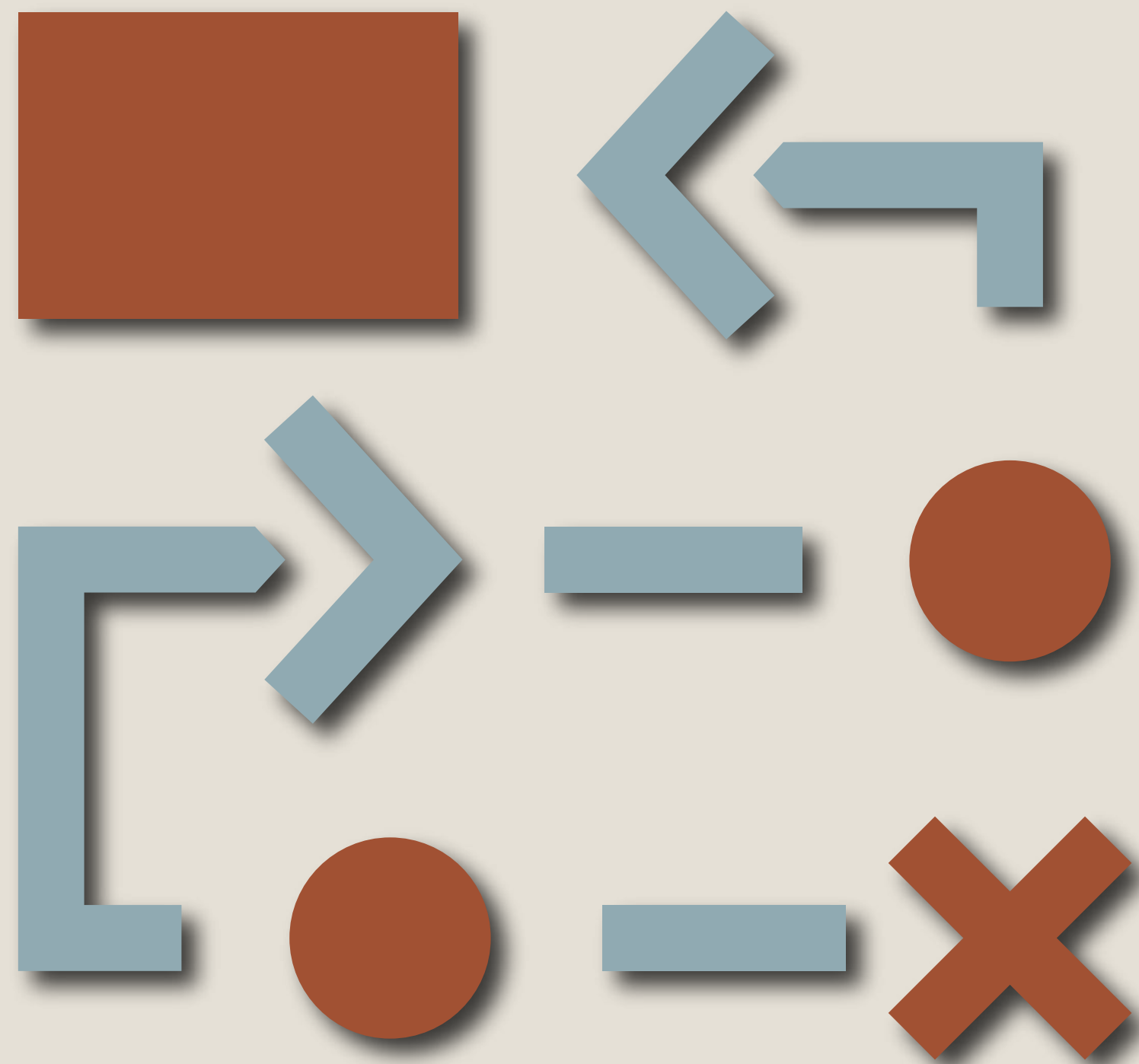
- **Communication**
- **Convening**
- **Data**
- **Capacity Building Through Human Capital**
- **Grants**

Destination Development Team

Lisa Macy-Baker
Destination Development Manager

Olivia Rovang
Destination Development Coordinator
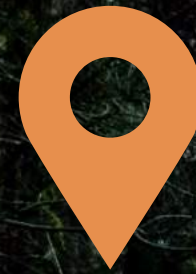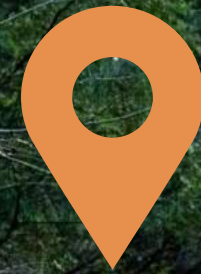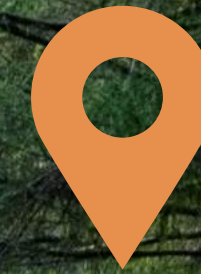
RARE | AmeriCorps

QUARRY PARK

Roughly $30k in Grant Funding Feasibility Studies + Economic Impact Analysis

Trip Generation & Site Access Report

Site Plan + Build Costs

PBS

March 29, 2023

Jeff Knapp, President
Visit McMinnville
328 Davis Street #1
McMinnville, Oregon 97128

Via email: jeff@visitmcminnville.com

Regarding: Trip Generation and Site Access Study
Proposed Quarry Park
SW 2nd Street and NW Meadows Drive
McMinnville Oregon
PBS Project 78061.000

Dear Mr. Knapp:

PBS Engineering and Environmental Inc. (PBS) is pleased to submit this trip generation and site access study for the proposed Quarry Park (Park). The report is intended to inform the Quarry Park Feasibility Study and Conceptual Trail Plan of traffic, parking, and other transportation issues as the project moves forward. The report is based on our site visit, meeting with City of McMinnville (City) staff, review of relevant documents, our traffic engineering investigation.

BACKGROUND
Visit McMinnville has prepared the Quarry Park Feasibility Study and Conceptual Trail Plan for a City park that will provide mountain bike and pedestrian trails. The 12-acre site is currently undeveloped and owned by the City, tax lot number R4419AD00700. See Figure 1 for a vicinity map.

This study is based on the conceptual site plan. See Figure 2.

Trip Generation and Distribution
Proposed Trip Generation
The City does not have a formal code provision regarding traffic impact analysis (TIA). Based on correspondence with the City's Senior Planner Tom Schauer, the City previously developed a guideline that a TIA would be required for a development with trip generation increases of 200 or more average daily trips (ADT), or 20 or more PM peak hour trips. A TIA may also be required if there are specific known concerns due to operations or accident history.

The trip generation for the proposed park is based on the Institute of Transportation Engineers (ITE) *Trip Generation Manual*, 11th Edition. The trip generation is based on a public park owned and operated by a municipal agency (ITE land use code 411). The ITE fitted curve equations were applied, and the independent variable was the number of acres for the proposed land use. The trip generation results are summarized in Table 1. The ITE recommends using trip generation estimates with caution due to the small sample size. Detailed trip generation calculations are attached for reference.

Quarry Park Conceptual Plan
McMinnville, Oregon
05 January 2022

Legend
- Site Boundary
- Access Trail
- Hiking Only Trail
- Easy Flow/Jump Trail
- More Difficult Flow/Jump Trail
- Most Difficult Flow/Jump Trail
- Vegetative Screening
- Restrooms
- Food Truck

City of McMinnville

Visit McMinnville

CYCLE YAMHILL COUNTY

PANTHER CREEK
MOUNTAIN
BIKE PARK

Partner Organizations

TRAVEL
OREGON

U.S. DEPARTMENT OF THE INTERIOR
BUREAU OF LAND MANAGEMENT

RARE
EST 1994

AmeriCorps

Tommy's

CYCLE YAMHILL
COUNTY

Visit
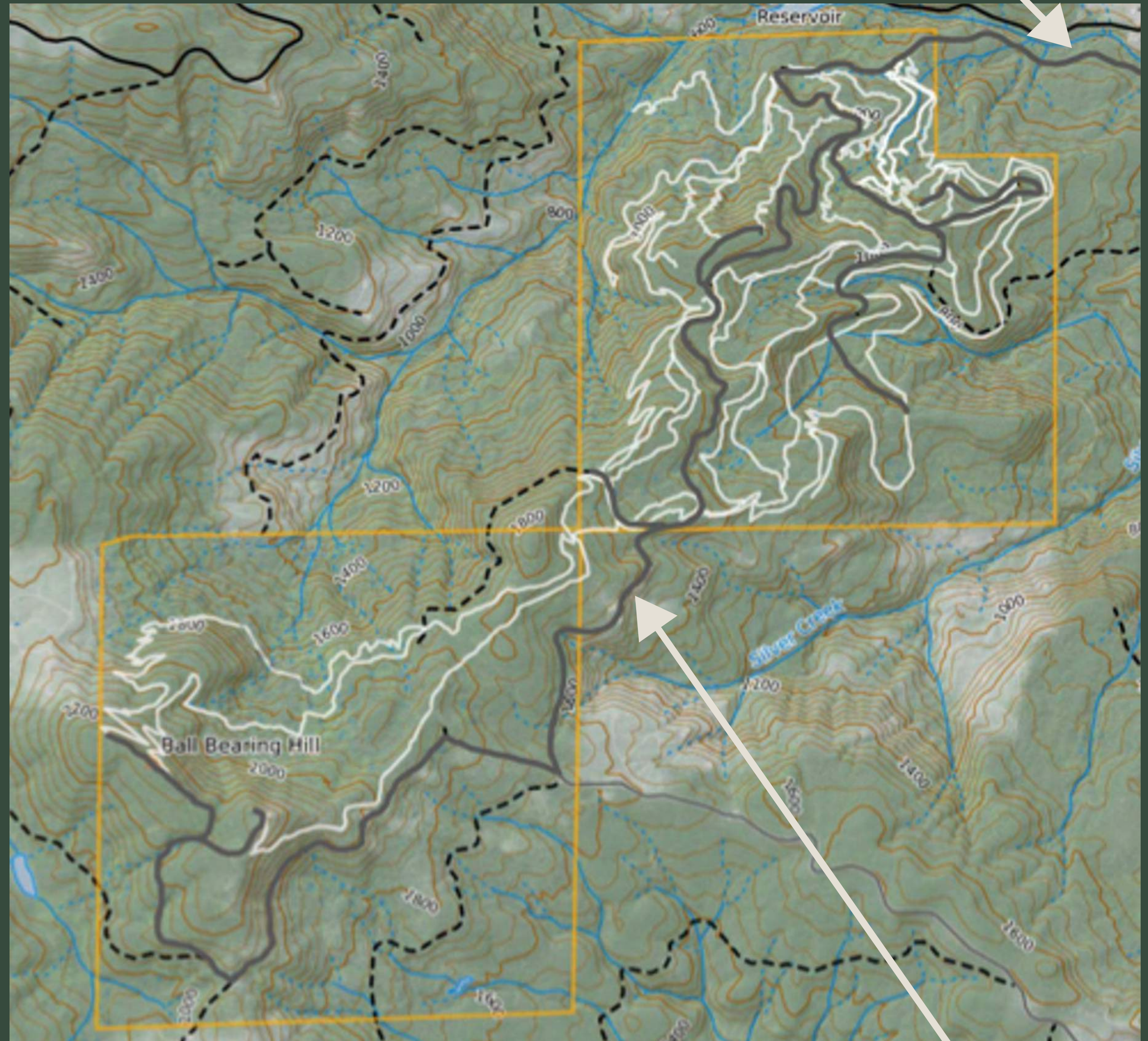McMinnville

PANTHER CREEK MOUNTAIN BIKE PARK

PANTHER CREEK
MOUNTAIN
BIKE PARK

Proposed
Maps

Proposed trails in three phases.

Phases not yet specified but likely 7-10 miles per phase with a mix of beginner, intermediate and advanced skill trails.
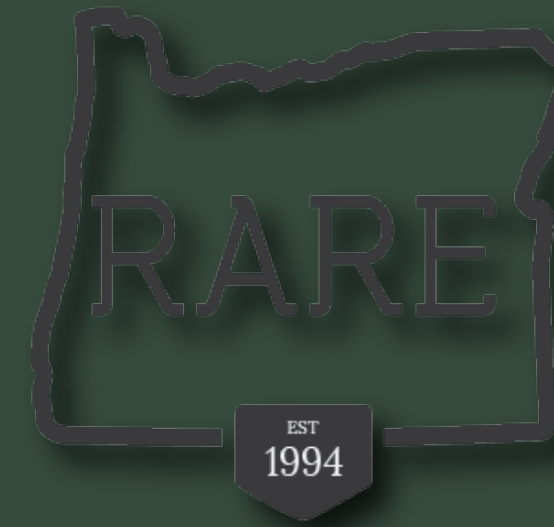
Panther Creek Road

Von Road

GRAVEL TRAIL SYSTEMS

Partner Organizations

RARE
EST 1994

AmeriCorps

TRAVEL OREGON

Visit McMinnville

Tommy's

CYCLE YAMHILL COUNTY

1843 YAMHILL COUNTY
OREGON

GRAVEL TRAIL SYSTEMS

Project Overview

CYCLE YAMHILL COUNTY
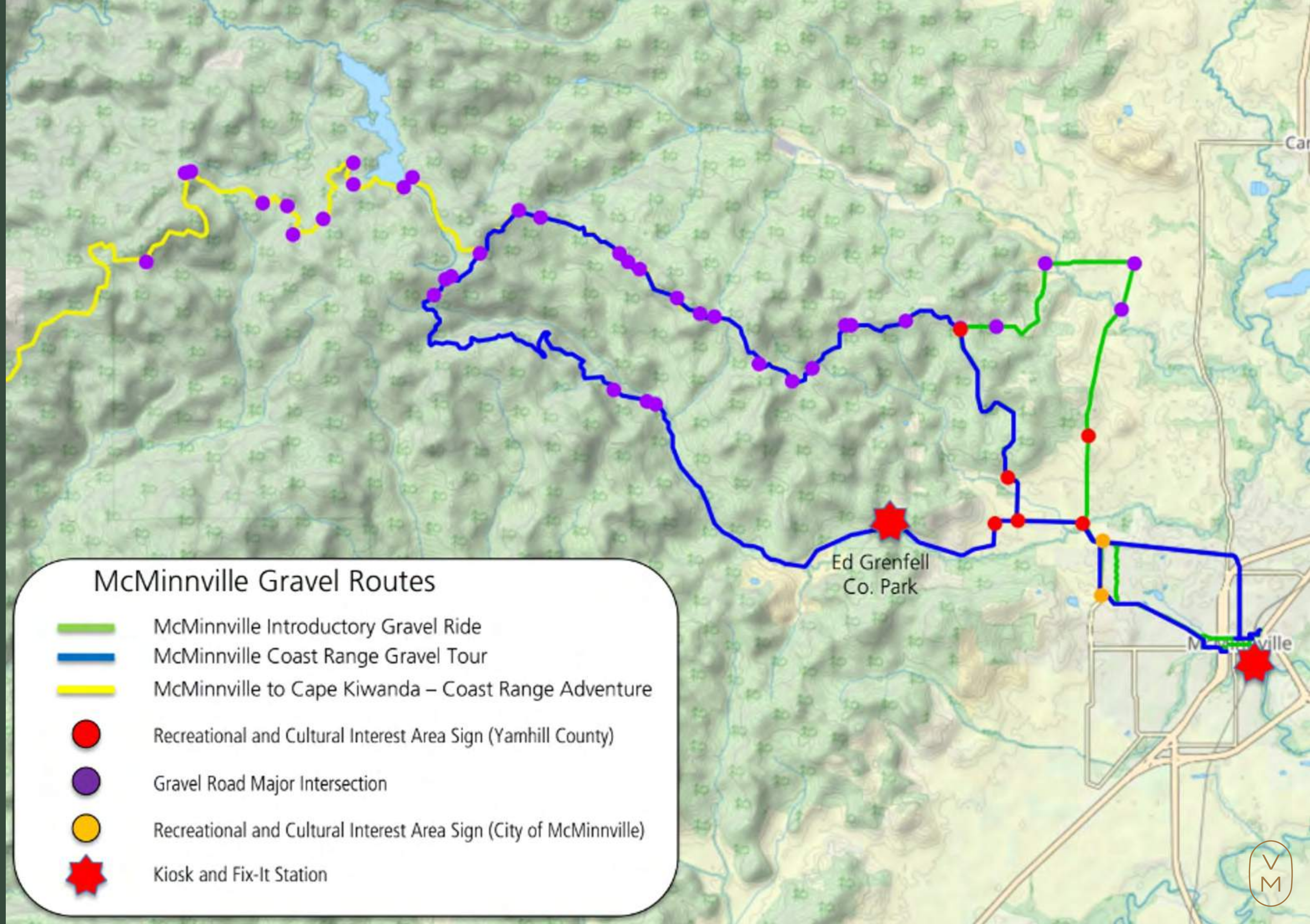
McMinnville Gravel Routes

━━━ McMinnville Introductory Gravel Ride

━━━ McMinnville Coast Range Gravel Tour

━━━ McMinnville to Cape Kiwanda – Coast Range Adventure

🔴 Recreational and Cultural Interest Area Sign (Yamhill County)

🟣 Gravel Road Major Intersection

🟠 Recreational and Cultural Interest Area Sign (City of McMinnville)

⭐ Kiosk and Fix-It Station

Ed Grenfell Co. Park

McMinnville

GRAVEL TRAIL SYSTEMS

Signage Overview

Route XYZ ←

Route ABC →

24"

24"

6 ft MIN.

5 ft MIN.

Paved shoulder

B - ROADSIDE ASSEMBLY RURAL AREA

CROWN Z

LINEAR TRAIL

WILARK TRAILHEAD

←

16
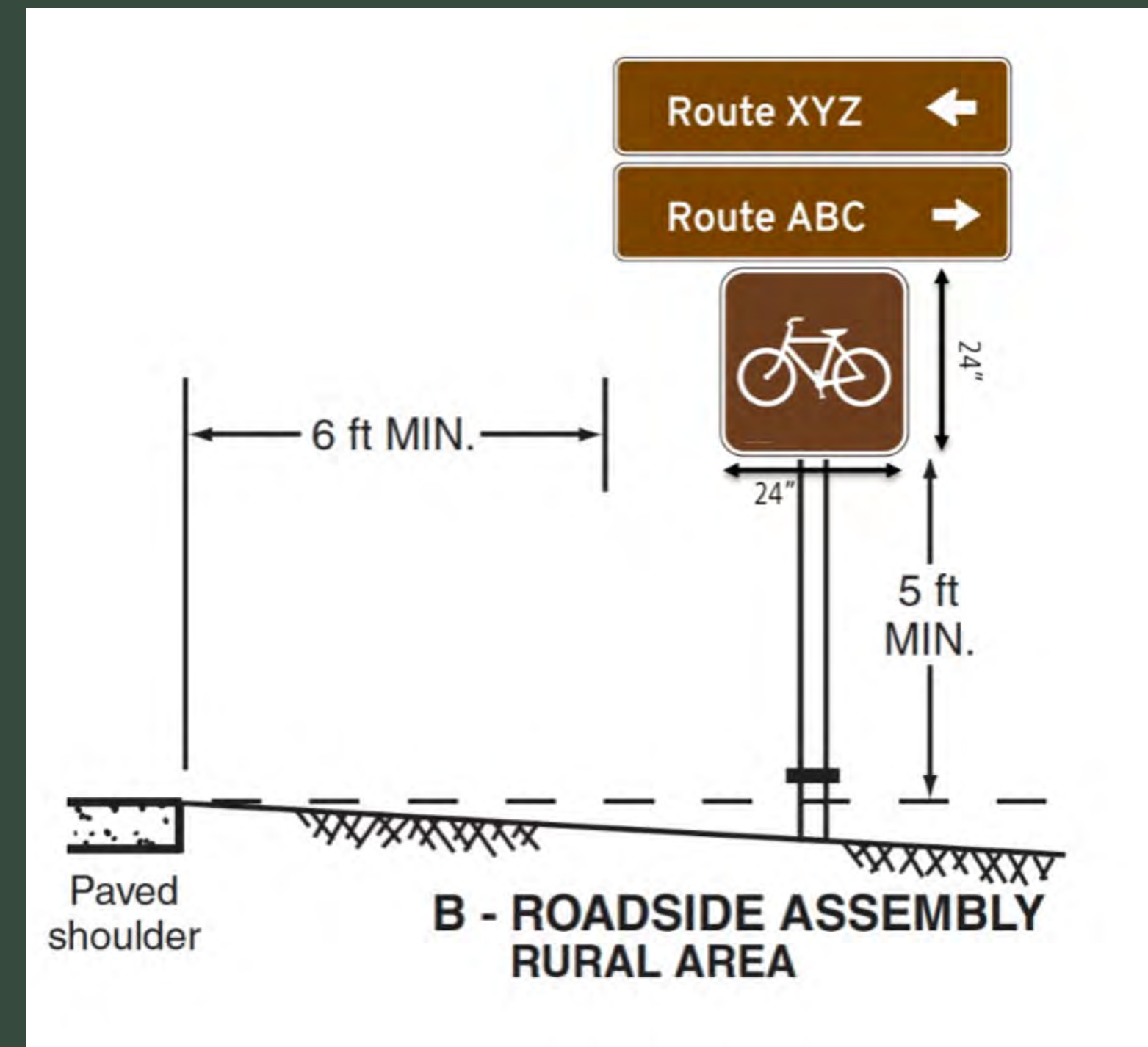
GRAVEL TRAIL SYSTEMS

Info Kiosks

Planned Locations

- Ed Grenfell Park – McMinnville, OR
- Buelah City Park – Yamhill, OR

Future Locations

- Tommy's Bike Shop – McMinnville, OR
- Multiple Coastal Towns, near trailheads

Partners:

NEW ENERGY WORKS
design • build • timberframing • woodworks

EXPLORE TUALATIN VALLEY

SEA REACH LTD.

THE OREGON COAST

Convening: Yamhill Rivers Access

Providing recreational access to communities along the Yamhill River.

Boating Access - DRAFT
Yamhill Rivers Recreation Workshops
07 February 2024

Three community engagement meetings to date.

Current vs Proposed Yamhill River access map.

Convening: **Yamhill Rivers Access**

$6,000 in grant funding to date, with Visit McMinnville contributing $1,500.

We are hopeful for additional grant funding from the National Park Service.

Convening: Art Alley Project

$50,000

Convening & T-Mobile Grant Assistance

Capacity: Hello McMinnville!

HELLO!
MCMINNVILLE
+ COMMUNITY CONNECTED +

Four Urban Renewal District
clean-up days in 2023.

Capacity: How We Show Up

McMinnville

- Adopt a Road Program
- Art Alley Convening + T-Mobile Grant
- Block Captain Program
- Gallery Theater Board
- MACPAC - Parks and Rec Advisory Committee
- Make Music McMinnville Board
- McMinnville Economic Vitality Leadership Committee
- McMinnville High School Career Pathway Job Shadow
- McMinnville Leadership Group
- McMinnville Urban Renewal Advisory Committee
- McMinnville Vagrancy Task Force
- MDA MacFresco Committee
- MDA Promotions Committee
- MDA Promotions Committee
- MEDP + Workforce Committee
- Stable Table
- Third Street Streetscape Advisory Committee
- Walnut City Music Festival Board

Region + State + Beyond

- Chemeketa Hospitality Advisory Committee
- Cycle Yamhill County
- Edible Landscapes of Yamhill County Board
- George Fox Hospitality Advisory Committee
- International Pinot Noir Celebration
- Oregon Destination Association Board
- Oregon Tourism Leadership Academy
- Oregon Wine Board Marketing Committee
- Willamette Valley Visitors Association Board
- Wine Country License Plate Advisory Committee
- Wine Country Pride Social Media Support
- Yamhill County CASA Board
- Yamhill River Committee
- YCAP Development Committee

Speaking Engagements

- Charleston Wine + Food
- Grant's Pass - TLT Committee + City Council
- Oregon City - TLT Committee + City Council
- Oregon Destination Association Conference
- Oregon Destination Boot Camp
- Oregon Governor's Tourism Conference
- Oregon Outdoor Recreation Summit
- Oregon Tourism Leadership Academy
- Sisters - TLT Committee + City Council
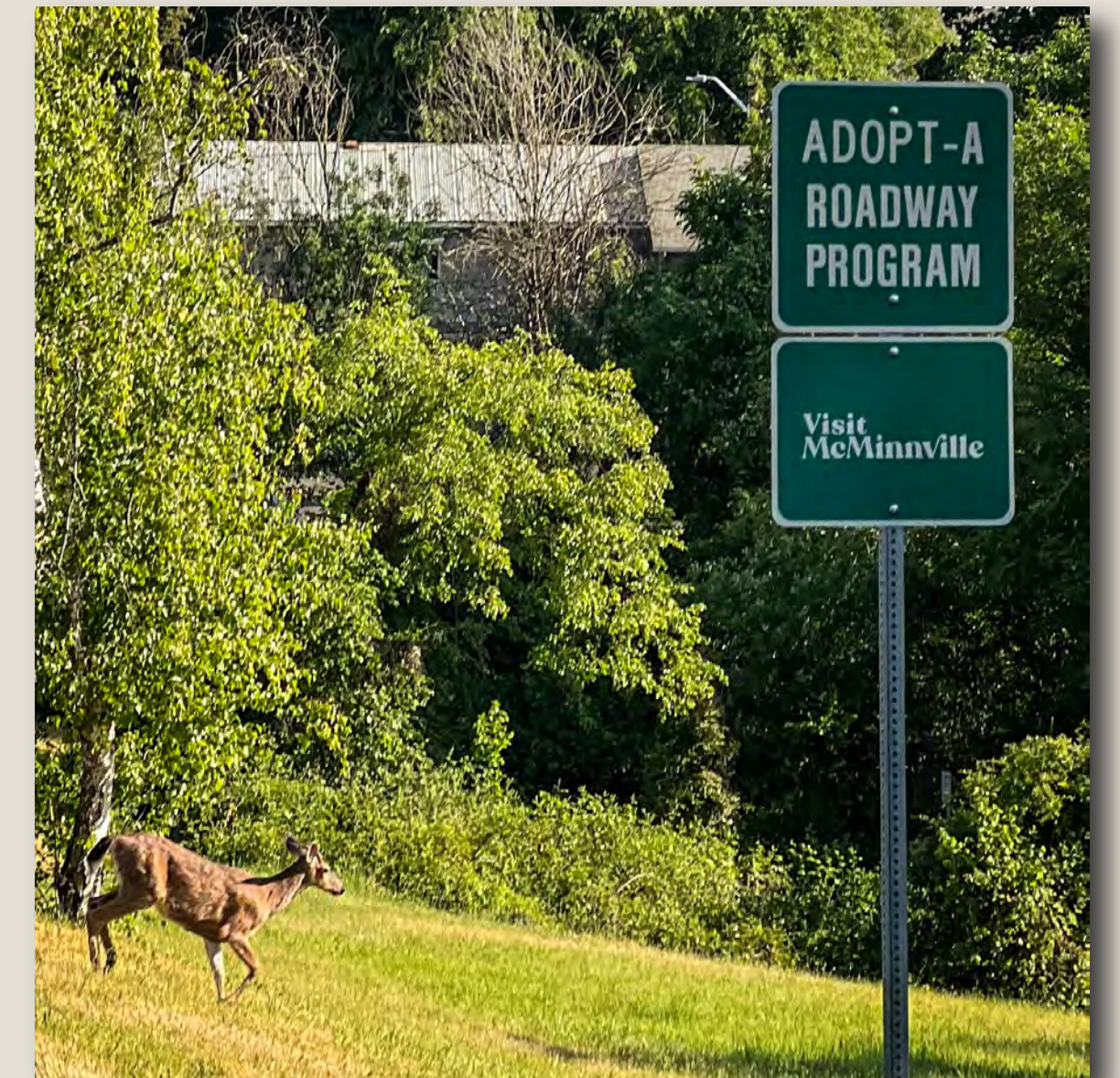
Communication: CRUSH✳

✳ 25+ Monthly episodes/Issues produced in English and Spanish.

✳ CRUSH has supported 22+ local writers and 30+ local artists

✳ CRUSH is distributed through the News-Register to 7,000+ local residents monthly

Approximately 10k copies are printed each month!

Over 2 years, **$90k** contributed to directly supported local Artists, writers, photographers and printers!
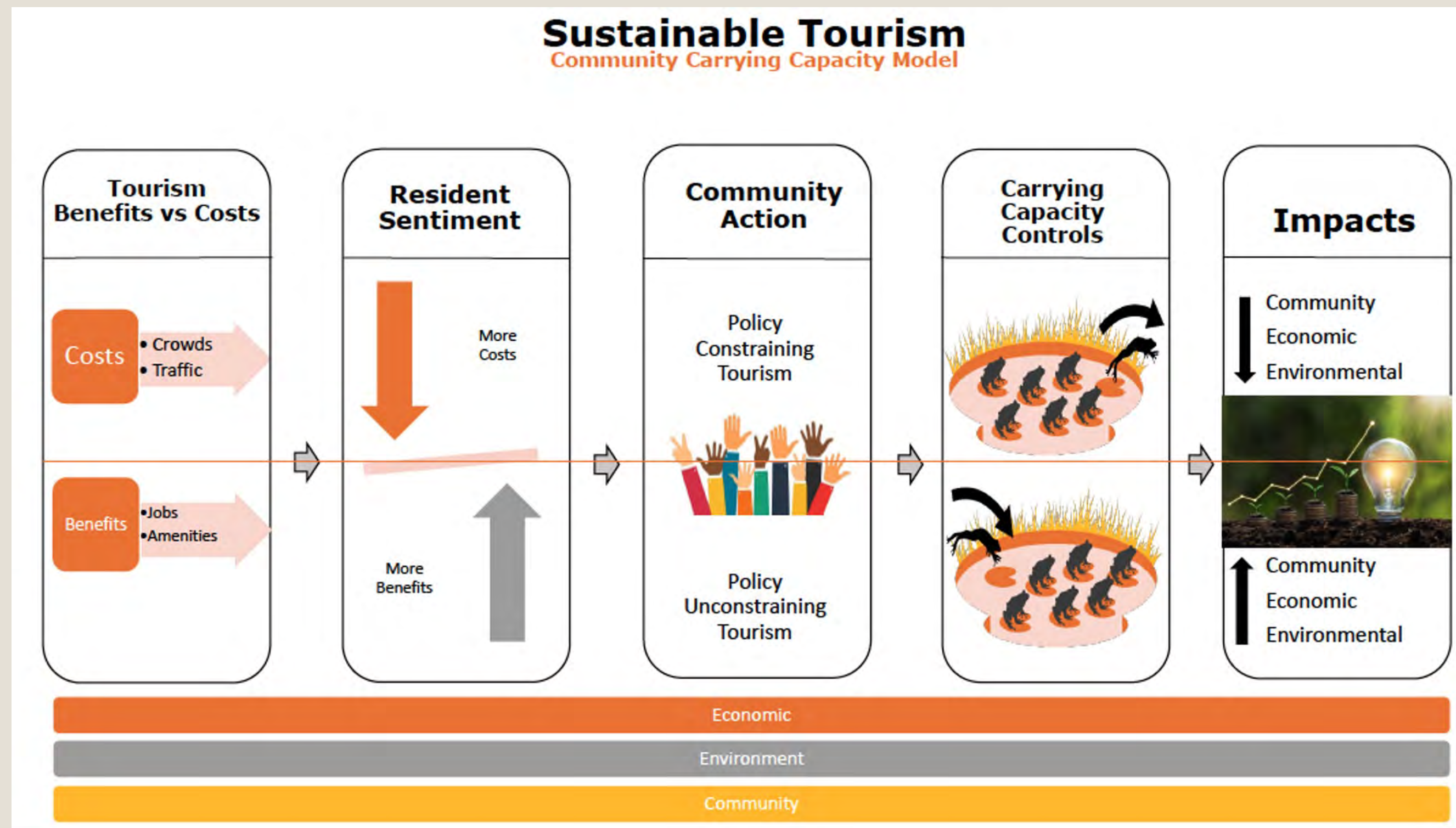
Data & Tools

2025 Budget & Planning

FISCAL YEAR 2025 PROPOSED BUDGET

FY24 Budgeted Operating Income
- **10.5% Increase | $1,347,475**

YTD Actual
- **6.6% Increase | To Be Determined**

. . . .

FY25 Budgeted Operating Income
- **3% Increase   • $1,358,297**

2025 Budget & Planning

VISIT MCMINNVILLE ORGANIZATIONALLY

- Organizational Stability and Growth +
Full New Department and Admin + HR

- Stronger Board Engagement

- Increase Local Awareness of VM's
Work in the Community and Value

2025 Budget & Planning

DESTINATION DEVELOPMENT

• **Strategic Expansion of Internal Community Communication Efforts**

• **Standing Up Community Connectivity and Capacity Program (Hello McMinnville)**

• **Increased Destination Development Support around Outdoor Recreation, Arts and Culture, Workforce, and Food Systems**

• **Sports Tourism Opportunity Analysis**

• **California Peer Share Trip**

2025 Budget & Planning

MARKETING AND COMMUNICATIONS

• **Expand Capacity**

• **Improve Social Media Strategy, Cadence, and Engagement**

• **Launch New Website Build in Winter 2025**

• **Expand Development/Community Support by expanding CRUSH and exploring other connectivity opportunities**

• **Target Lifestyle Earned Media with a food-focused + sense-of-place messaging**
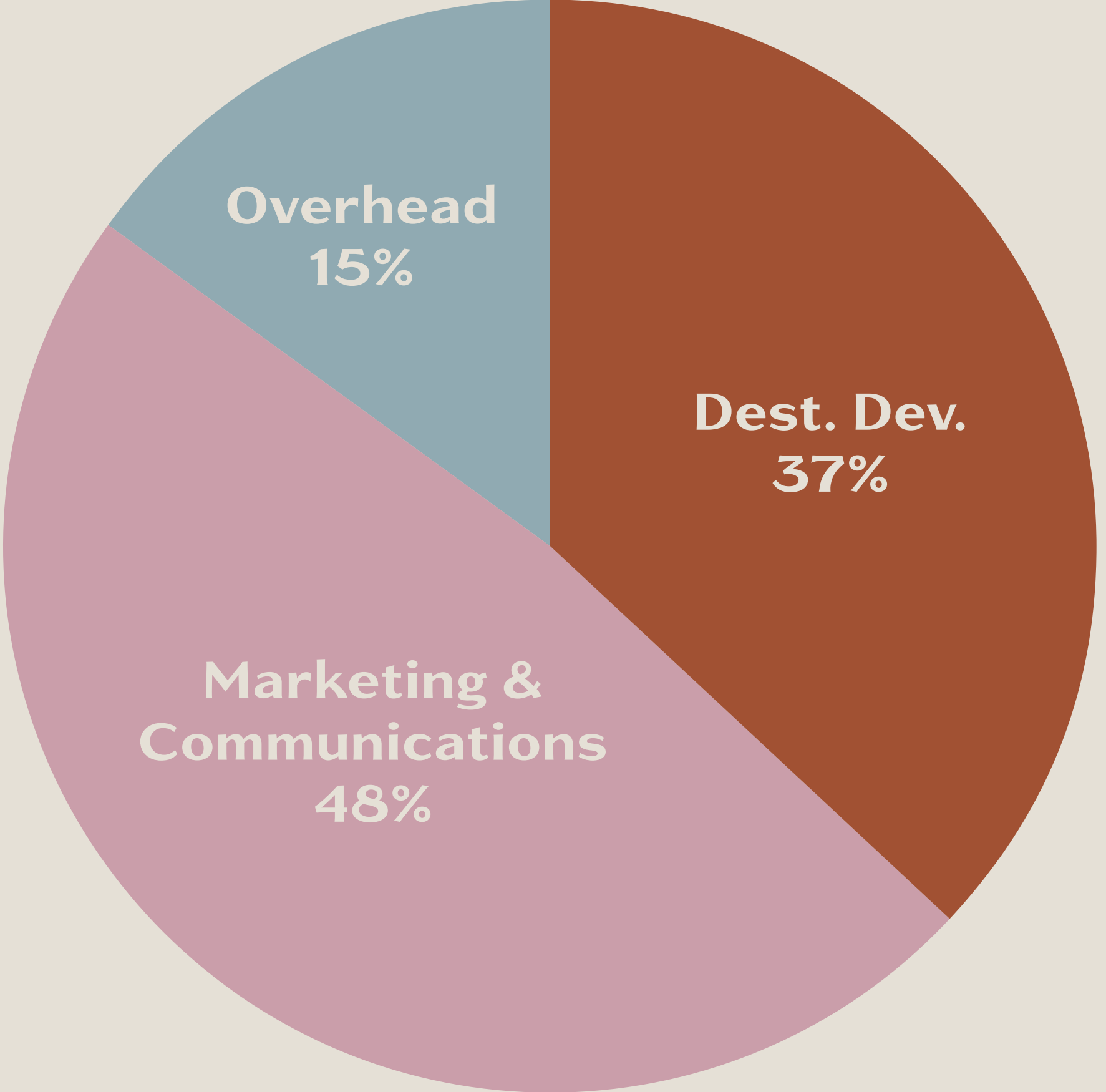
2025 Budget & Planning

FY25 PROPOSED BUDGET

Personnel 45%
Dest. Dev. 16%
Overhead 11%
Marketing & Communications 28%
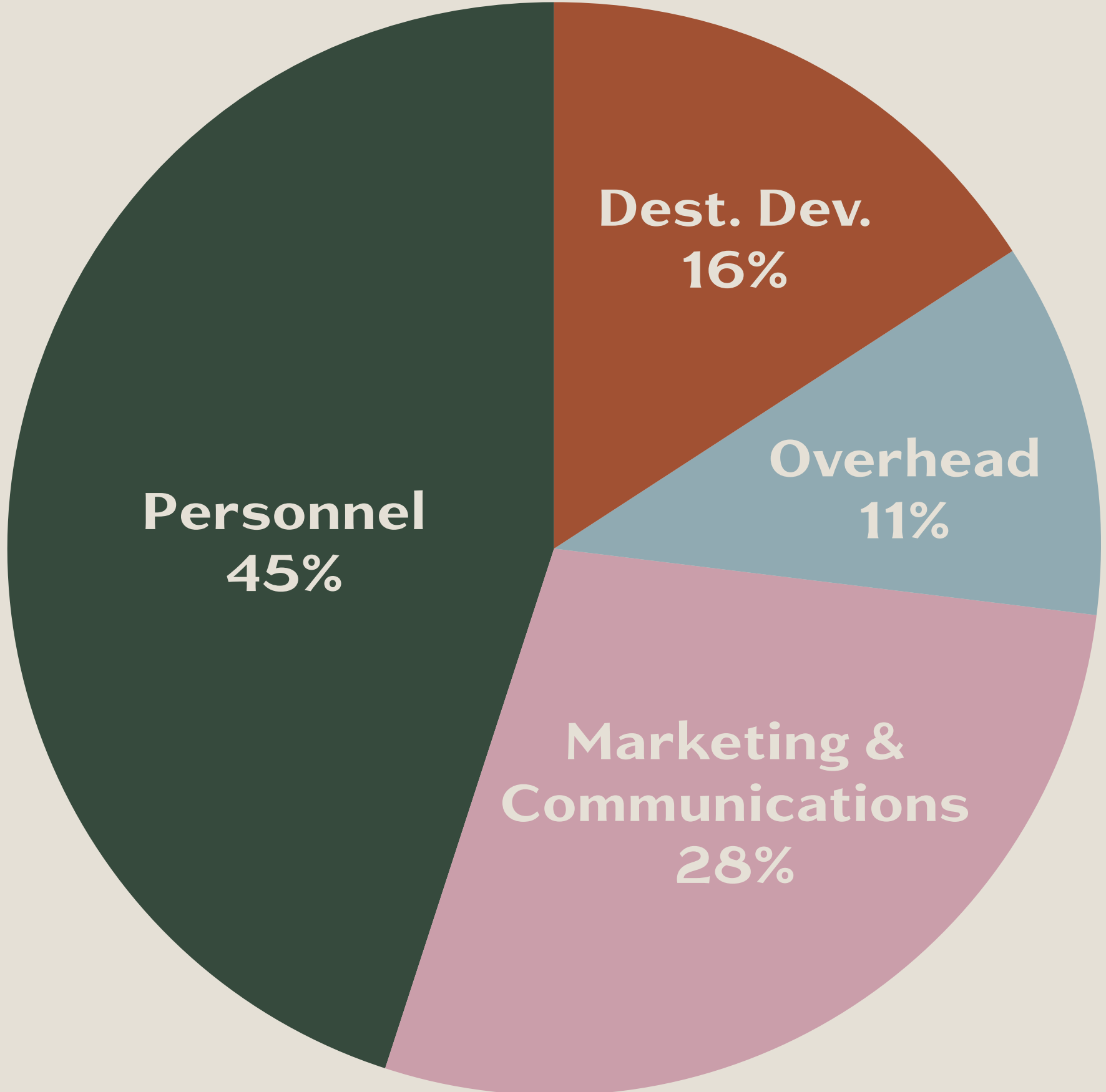
FY25 PROPOSED BUDGET
Inclusive of Staffing

Overhead 15%
Dest. Dev. 37%
Marketing & Communications 48%

We CULTIVATE the VISITOR ECONOMY *in* McMINNVILLE to ENHANCE the QUALITY of LIFE IN OUR COMMUNITY