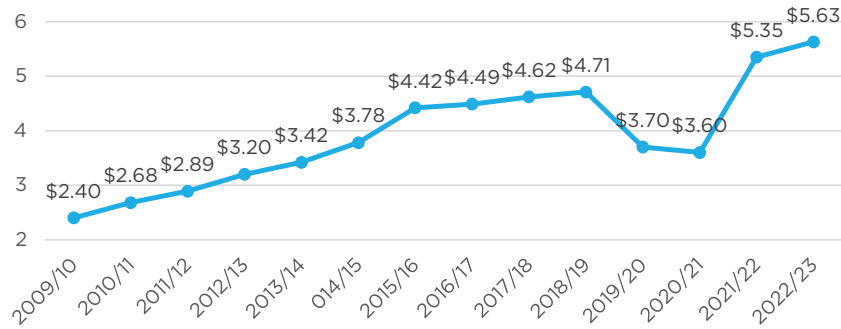


FY 22/23 Annual Report

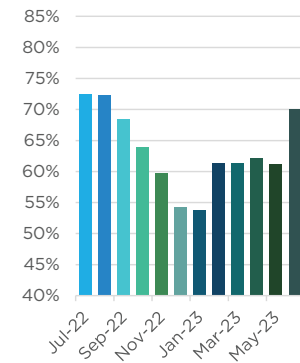
Clackamas County Tourism's mission is to improve the quality of life for residents by optimizing the economic impacts of the tourism industry. The statistics shared here are indicators of the industry's benefits as an economic driver.

Clackamas County TRT Revenue by FY
(\$millions)

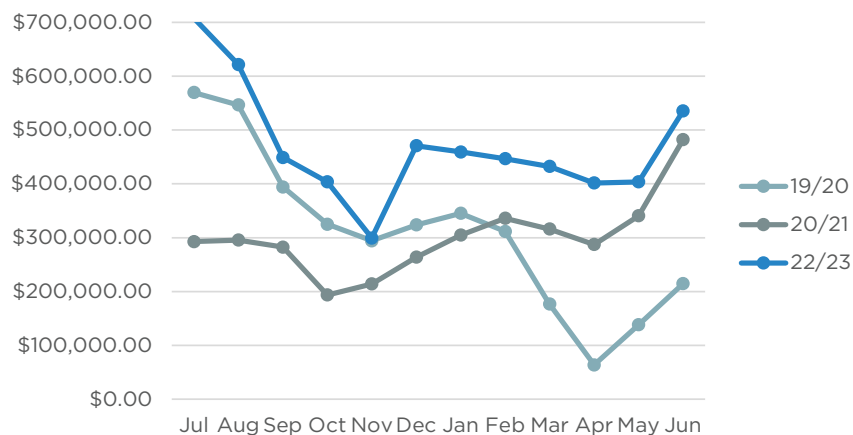


TRT earnings (left) show strong recovery, with FY 22/23 performing above prepandemic levels (first part of FY 19/20). FY 22/23 seasonal occupancy (right) shows lower occupancy rates during the winter months. When compared to regional and state trends for the same time period (below) Clackamas County's winter occupancy remains stronger with less marked seasonal change during FY 22/23.

Clackamas County -
Seasonal Occupancy % FY
22/23

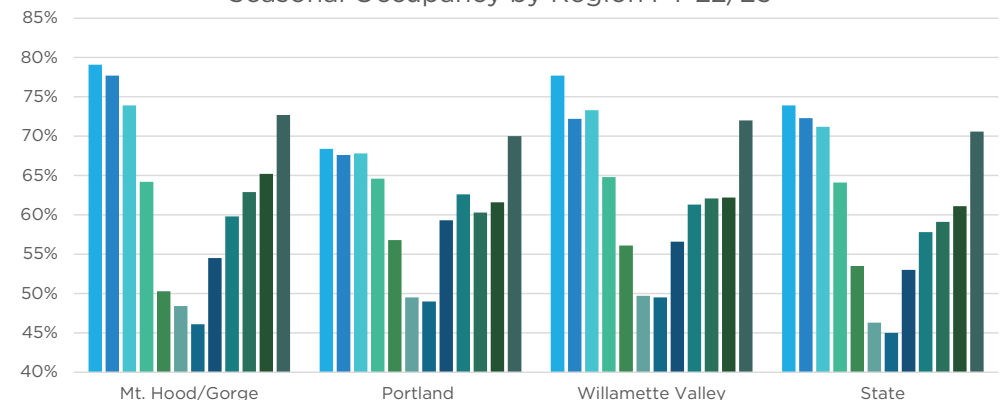


Clackamas County TRT Earnings



Clackamas County TRT Collections

Seasonal Occupancy by Region FY 22/23

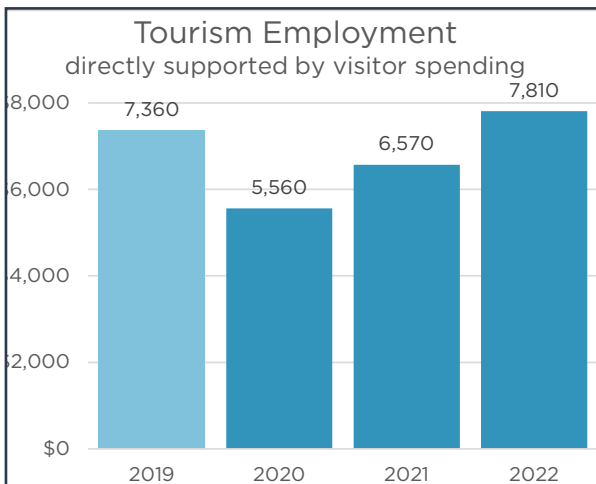
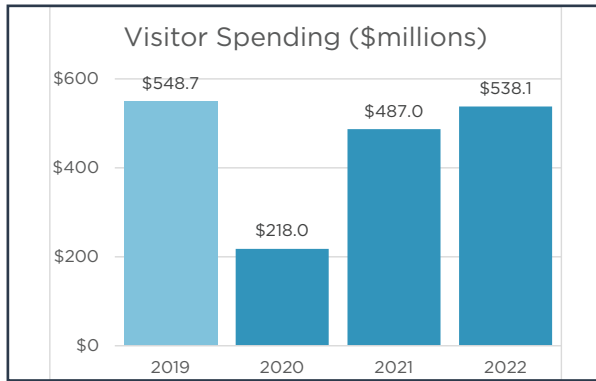


Smith Travel Research (STR)

2022 Economic Impact Measurements

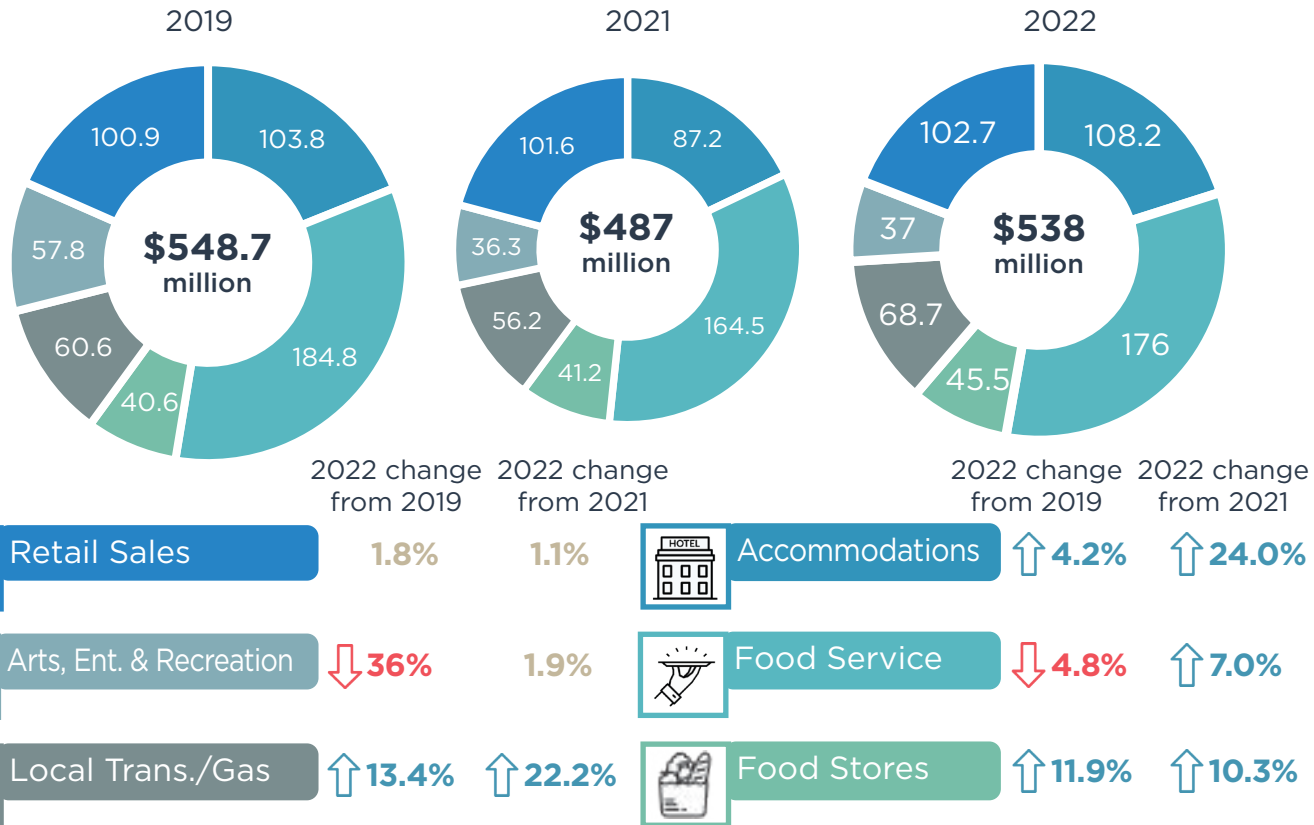
VISITOR SPENDING BY SECTOR

Overall, 2022 visitor spending in Clackamas County reached **98%** of 2019 (prepandemic) levels. Below is a breakdown of total visitor spend by commodity purchased in (\$millions).
Details may not add to totals due to rounding. - Dean Runyan & Associates



Dean Runyan & Associates

Earnings and Employment include CARES Act support for 2020



LOCAL IMPACT

In 2022 the average visitor...



spent **\$58** daily

0% from 2019
(vs. \$58/day)



stayed for **3.1** days

↑7% from 2019
(vs. 2.9 days)



Tourism generated
local taxes of **\$5.4M**

↓10% from 2019
(vs. \$6.0M)

↓11% YOY from 2021
(vs. \$65/day)

↓6% YOY from 2021
(vs. 3.3 days)

↑25% YOY from 2021
(vs. \$4.3M)

Dean Runyan & Associates

industry.traveloregon.com/resources/research

FY 22-23 Datafy Visitor Trends

Datafy leverages data sources like geolocation, spending, demographics, transportation and more to turn “big data” into reportable and actionable insights. These insights help destination managers with decision making. Datafy represents trends of data rather than precise number counts in a destination because of the variables in how the data is collected. On the next few pages, the data is set to represent all visitors from FY22/23 whose main residence is from 50+ miles away from Clackamas County.

All of Clackamas County

Overview : 7/1/22 - 6/30/23



Mountain

Overview : 7/1/22 - 6/30/23



Urban

Overview : 7/1/22 - 6/30/23



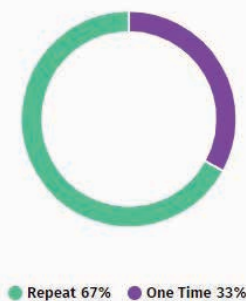
Valley

Overview : 7/1/22 - 6/30/23



The above shows a significant increase in unique visitors in FY 22/23 over FY 21/22 with a relatively stable number of total visitor trips. This is likely due to the fact that FY 21/22 was still relatively impacted by COVID with a significant number of in-state repeat visitors. In FY 22/23 we saw an increase in fly and drive markets from others states, so while there are a larger number of unique visitors than the previous year, we see little change in total trips because there were fewer repeats within the year from those visitors.

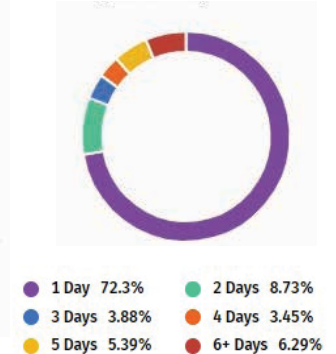
Comparison of Trips



Trips by distance from destination

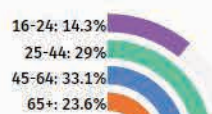


Length of Stay

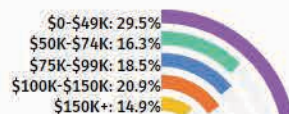


Visitor Demographics

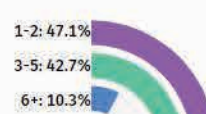
Age



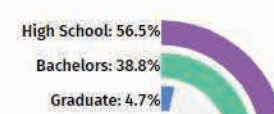
Income



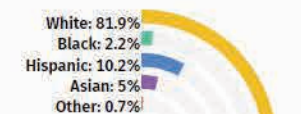
Household



Education Level



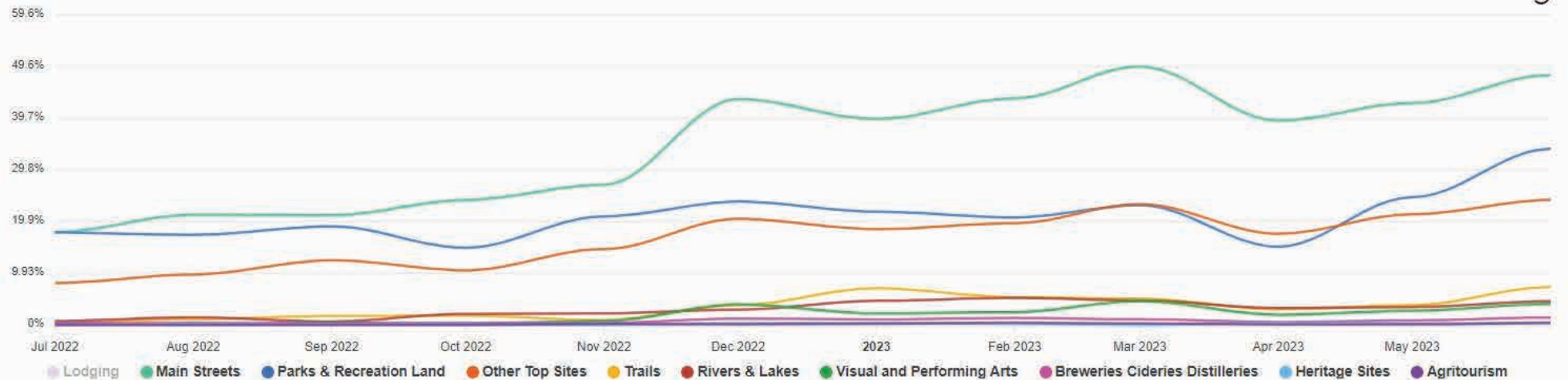
Ethnicity



FY 22-23 Datafy Visitor Trends

The below data shows the correlation of all visitors (50+ miles away) who stayed in lodging and what type of activity areas they visited over the course of their trip(s) during FY 22/23. Visitation to main streets increased starting November 2022 and continued to see increases over the holidays as well as spring break 2023.

Correlation Over Time



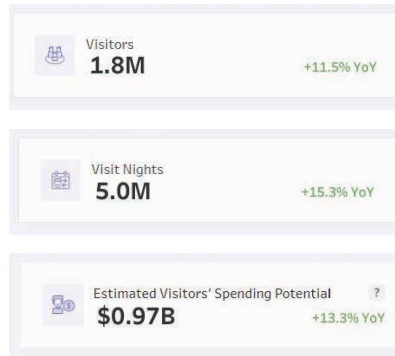
To the right are top visited “sites” in Clackamas County in FY 22/23. Though Datafy is not able to capture a true visitor count, this data is incredibly valuable in identifying trends. Here, you will notice our highest visited tourist attraction areas are those mostly based on Mt. Hood. This aligns with our understanding of top tourism sites in the region. However, when looking at the overall trip visitation in the previous Datafy page, the urban (Portland) region still receives the highest number of overall visitor trips in the county by more than double as compared to the Mt. Hood region. This could be due to the proximity to Portland city attractions, Clackamas County’s urban lodging options for Portland and/or a close place to visit friends and family or one of our main streets.

polygon	trips
Hood National Forest Zigzag Distric...	1,470,026
Clackamas Town Center PR	582,234
Wilsonville Main Street	527,304
Government Camp Main Street	205,147
Summit parking lot MHG	191,055
Timberline Summit Ski Area MHG	189,904
Sandy Main Street	174,836
Villages of Mt. Hood Main Street	150,302
Oregon City Main Street	136,171
Timberline Lodge & Ski Area	83,814
Lake Oswego Main Street	81,705

Willamette River - lower PR	80,178
Mt Hood Skibowl MHG	67,257
Happy Valley Main Street	65,814
Mt. Hood National Forest Clackamas D...	53,251
West Linn Main Street	47,774
Cascadia Center for Arts & Crafts	43,849
Wooden Shoe Tulip Farm WV	42,844
Monarch Hotel & Conference Center	42,511
Molalla Main Street	38,526
Canby Main Street	37,099
Clackamas River - lower PR	36,229

FY 22-23 Placer.ai Visitor Trends

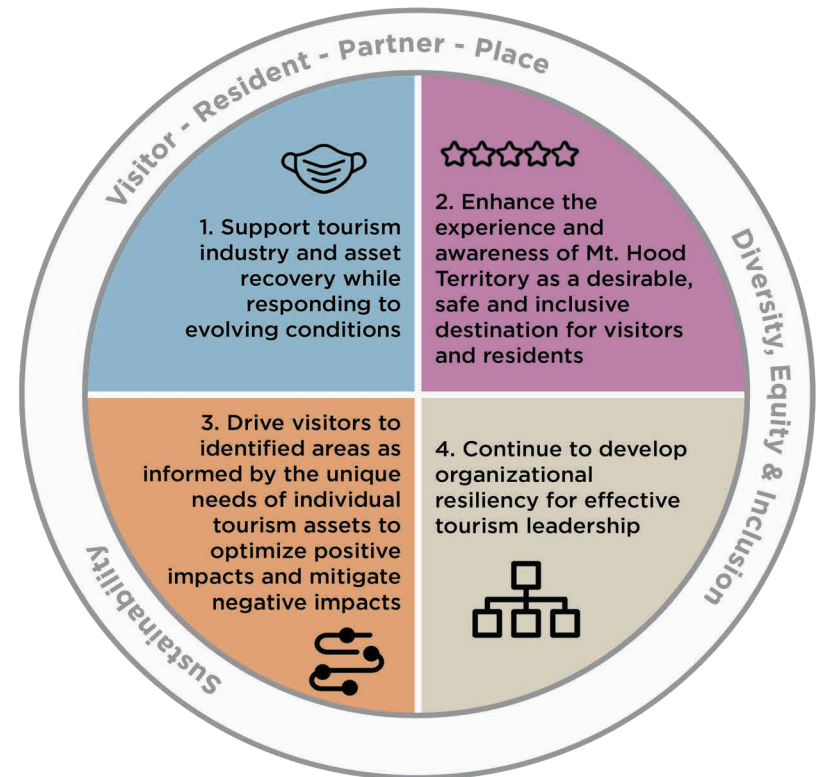
With the Mt. Hood/Gorge Region's access to data platform Placer.ai, we were able to pull a FY 22/23 tourism report for Clackamas County top visitor markets including daily disposable income. This data represents visitors from the US that spent the night in the county and stayed no more than 31 days.



CBSA	≡	Visitors				Visit Nights				Median Daily Disposable Income			
		0K	200K	400K	600K	800K	0K	500K	1000K	1500K	2000K	\$0	\$200
Portland-Vancouver-Hillsboro..		0.57M				1.5M						\$199.6	
Seattle-Tacoma-Bellevue, WA		0.15M										\$256.1	
Corvallis, OR		73.7K				0.31M						\$162.4	
Salem, OR		98.6K				0.28M						\$163.0	
Eugene-Springfield, OR		85.2K				0.26M						\$146.9	
Bend, OR		64.5K				0.14M						\$179.9	
Los Angeles-Long Beach-Anah..		42.8K				0.14M						\$240.9	
Phoenix-Mesa-Chandler, AZ		29.6K				0.10M						\$207.8	
San Francisco-Oakland-Berke..		30.1K				86.1K						\$313.8	
Boise City, ID		24.6K				69.4K						\$179.3	
Medford, OR		25.3K				61.7K						\$152.8	
San Diego-Chula Vista-Carlsba..		14.8K				53.5K						\$233.4	
Sacramento-Roseville-Folsom..		19.9K				50.2K						\$222.6	
Spokane-Spokane Valley, WA		17.8K				48.8K						\$174.8	
Riverside-San Bernardino-Ont..		12.6K				45.7K						\$200.0	
Albany-Lebanon, OR		17.2K				37.4K						\$154.4	
San Jose-Sunnyvale-Santa Cla..		12.4K				36.7K						\$325.8	
Kennewick-Richland, WA		16.7K				35.5K						\$198.0	

FY 22/23 Strategic Outcomes

Clackamas County Tourism set four key strategic outcomes for FY 22/23. These outcomes came out of a planning process involving stakeholder feedback, the Tourism Development Council and staff. The Strategic Outcomes respond to the current state of the tourism industry with the goals of recovery as well as optimizing tourism's impact across the communities of Clackamas County. In addition to the four Strategic Outcomes, Clackamas County applies three key lenses to all of our work: sustainability; Diversity, Equity and Inclusion; and the key stakeholders of Visitor, Resident, Partner and Place (VRPP). The following pages recap the intent of each Strategic Outcome and give examples of how Tourism's work during FY 22/23 supported the outcomes.



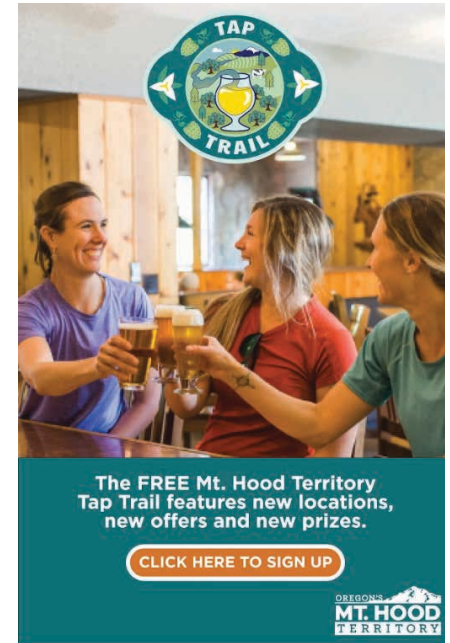
Outcome 1: Tourism Recovery

“Support tourism industry and asset recovery while responding to evolving conditions”

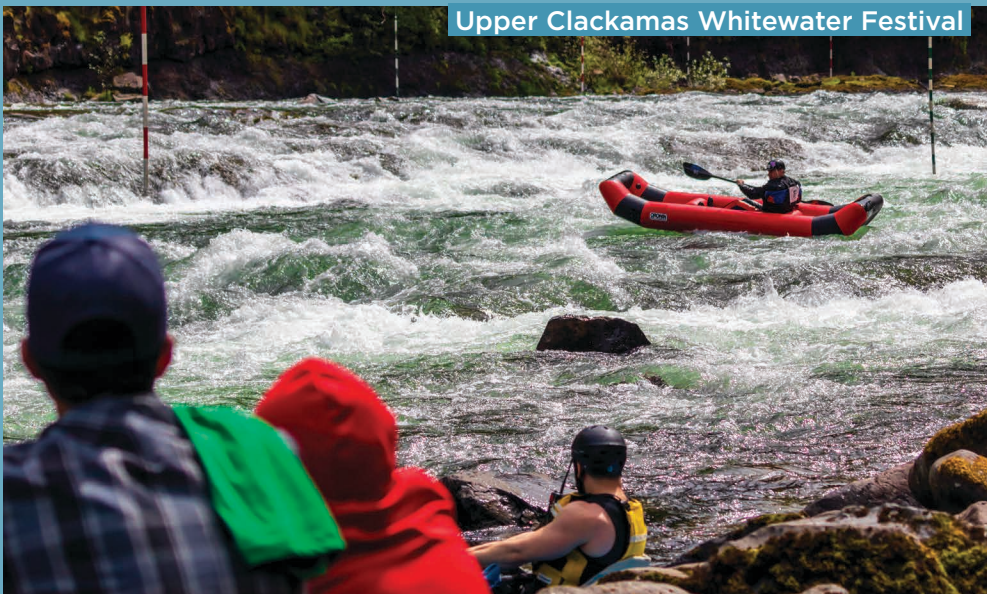
A survey of tourism partner businesses ranked impacts of COVID-19 and the 2020 Riverside Fire as barriers to their success and identified lasting effects to the visitor experience. This outcome is focused on those specific needs and acknowledges the possibility of ongoing impacts and future disruptive events.

To support tourism industry recovery following COVID, Clackamas County Tourism leaned in to providing direct support to businesses. Marketing support came in the form of **specially tailored collaborations**, as well as an **expanded Marketing Support Co-Op Program**. Co-Op offerings included print and digital marketing with local and global ad outlets. Price to participate ranged from \$50 - \$750 to meet the needs of diverse partner businesses. A total of 45 businesses participated in the FY 22/23 Co-Op program, many using multiple offerings.

Not all sectors within the tourism industry were impacted equally by COVID. Among the hardest hit were food and beverage as well as heritage assets. In January 2023, Clackamas County Tourism **refreshed and rebranded our Tap Trail, Wine Trail and Heritage Trail**. The new look and feel of the trails paired with improved functionality. We supported the relaunch of the passes with tailored paid advertising campaigns. The program refresh resulted in 12k views of the Heritage Trail content, 477 Tap Trail sign ups and 418 Wine Trail sign ups. The Tap Trail and Wine Trail together drove 237 visits to business via gamified passport check-ins and redemptions.



Upper Clackamas Whitewater Festival



In FY 22/23 impacts of the 2020 Riverside Wildfire were still effecting the Upper Clackamas River recreation assets and the nearby community of Estacada. Clackamas County Tourism funded a request from the National Forest Foundation leveraging federal funding to **restore the Rainbow Campground and Riverside Trail**, year-round recreation assets. Additionally, Mt. Hood Territory provide an **event sponsorship for the 2023 Upper Clackamas Whitewater Festival** to assist the event's recovery momentum after a 3-year hiatus due to COVID and the wildfire. These investments support immediate community needs as well as develop long-term destination assets.

Outcome 2: Safe and Inclusive

“Enhance the experience and awareness of Mt. Hood Territory as a desirable, safe and inclusive destination for visitors and residents”

This outcome considers both perceptions of Mt. Hood Territory as a destination, as well as elements of safety in the on-the-ground experience. It encompasses DEI values and travel for all. It also considers safety for visitors and residents in the face of natural disasters.

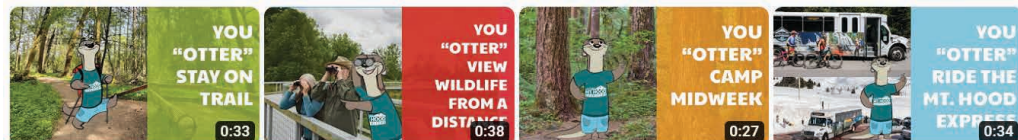


We launched our **“Otter Do” campaign** featuring an animated river otter offering a friendly invitation for visitors to travel responsibly in Mt. Hood Territory. The campaign addresses visitor safety as well as destination health and its effect on residents. “Otter Do” messaging was supported with paid advertising, resulting in 13k page views and over 3,300 conversions. YouTube video content received nearly 30,000 views across 6 videos. The “Otter Do” page was one of our top 10 most visited pages for FY 22/23, and contributed to **safe behaviors and perceptions of responsible tourism**.

Otter Dos ▶ Play all

No matter when you visit Mt. Hood Territory, you're set to have a great time. Each season presents its own list of things you should know to ensure your trip is as good as possible. The Mt. Hood...

Otter Do Responsible Travel Videos



Why Should You Stay On Trail And Practice Leave No...

Oregon's Mt. Hood Territory
29K views • 9 months ago

Be Safe And View Wildlife From A Distance

Oregon's Mt. Hood Territory
122 views • 7 months ago

Top Reasons To Camp Midweek

Oregon's Mt. Hood Territory
17 views • 8 months ago

Best Way To Travel Up Mt. Hood - Ride The Mt. Hood...

Oregon's Mt. Hood Territory
100 views • 10 months ago

The **Sandy Actors Theatre** received a **Strategic Investment Program grant** from Mt. Hood Territory in the amount of \$20,000 to replace stadium style seating with **ADA-friendly and flexible seating options that will enable all guests to attend and better enjoy performances** regardless of physical or mobility challenges. The improvements will work to expand visitation to new and diverse audiences.



Sandy Actors Theatre

From recent wildfire experience, we knew that visitors staying in vacation rental properties were the most difficult to support during disasters. To address this need, we provided 72-hour **emergency kits with customized Clackamas County emergency information** to vacation rental properties registered with Clackamas County TRT. The project delivered supplies for 1,136 people to 151 properties, most in rural Clackamas County. This project benefitted both visitors and residents' safety in the destination by easing strain on first responders.



Emergency Kits for Vacation Rentals

Outcome 3: Visitor Flow

“Drive visitors to identified areas as informed by the unique needs of individual tourism assets to optimize positive impacts and minimize negative impacts”

Clackamas County is a large destination, with varied needs across geographic and industry sector areas. This outcome focuses on supporting areas that are at capacity and driving visitors to underutilized assets.

Knowing that there is a demand for outdoor recreation in our destination and that many areas especially on Mt. Hood experience negative impacts from overuse, Mt. Hood Territory created an **outdoor recreation map for the Molalla River Recreation Corridor**. Mt. Hood Territory convened Molalla tourism leaders and worked with Travel Oregon to complete and distribute the brochure map, which included recreation assets as well as agritourism experiences, dining and shopping around Molalla. This project takes an identified interest area - outdoor recreation - and provides an alternative experience in an area with capacity.

Molalla River Corridor Recreation Map CITY OF MOLALLA



You'll find all kinds of adventure in the forests and farms across the Wild & Scenic Molalla Corridor—and we'll cover those soon enough—but the city of Molalla itself rewards visitors who take time to stroll the cozy downtown core, dive into its historic charms, and embrace a wide range of fun attractions.

Want to ride a miniature train, dive into regional history, or actually shydive from more than three miles up? You can do it all (and then some) in Molalla. Here's a sampling of ideas and attractions to help you plan a memorable trip to the friendly community.

- **Molalla Train Park:** Since 1954, Molalla Train Park has offered joyous rides on miniature trains to kids of all ages. Today, the four-acre park features a 2,000-foot-of-track—all of which can be explored with rides that showcase ponds, shrubs, bridges, and impressive forested scenery. Rides typically last 7-10 minutes and are offered May-October.

- **Escape Molalla:** Do you think you and your friends or family can solve all the puzzles and make it out in time? Find out at Escape Molalla, the city's beloved escape room. There you'll be locked in

forests, and the Molalla River winding through it all.

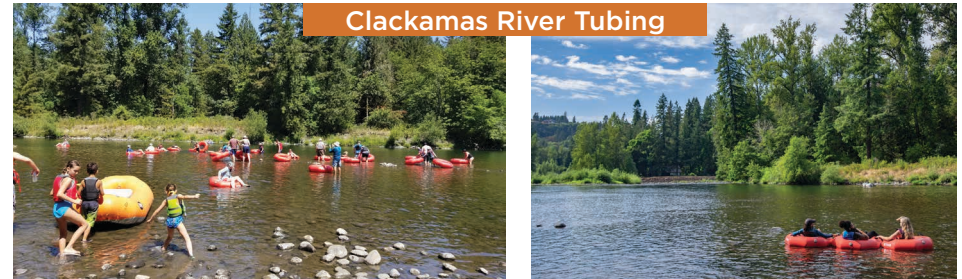
- **Molalla Museum Complex:** Since time immemorial, the Molalla people have hunted, fished, foraged, and lived in and around present-day Molalla. More recently, European-American settlers and farmers moved to the forested foothills of Mount Hood in the mid-1800s, transforming the region forever. Get a feel for that history at the Molalla Museum Complex, which includes several structures, displays, exhibits, and artifacts that cover the area's Native American populations, European settlement, the rise and fall of the local timber industry, and other fascinating topics.

- **Molalla Buckaroo:** The famous Molalla Buckaroo has been showcasing some of the country's best cowboys and cowgirls for more than a century and remains a regional icon today. Enjoy a dose of small-town charm over Independence Day weekend with an on-site carnival, Molalla's Rodeo Walk of Fame, five days of rockin' rodeo events, and a nightly fireworks display.

- **Enjoy a filling meal:** Chefs all over Molalla source their ingredients from local ranchers and farmers to craft fresh, filling, and flavorful dishes. Enjoy a variety of burgers, sandwiches, and barbecue-influenced dishes at The Humble Pig Cafe, Mexican fare from the Taqueria La Sileta food truck, or pies and wings from Bear Creek Pizza and Pub.



To address summer congestion along the popular stretch of the Clackamas River, Mt. Hood Territory **convened a group of land managers and partners to put together an informational campaign promoting alternative float options**. Working with State and County Parks and nonprofit groups like We Love Clean Rivers, we worked to mitigate the negative impacts through visitor dispersal. Learnings from the 2022 season went on to improve the following year of the initiative.



Lodging tax collections showed that Clackamas County's urban Portland region hotels were continuing to recover more slowly than other regions of Clackamas County, so we ran a **spring lodging campaign through Expedia featuring our Portland Region properties**. The campaign had nearly 17M impressions with 6,475 clicks to a custom landing page within the Expedia platform. This campaign resulted in the booking of 2,481 room nights with an estimated \$392,000 in gross bookings for our target properties.

Urban (Portland Region) Expedia Campaign

expedia group
media solutions

Search Oregon's Mt. Hood Territory

Going to Lake Oswego

Check-in Feb 4. Check-out Feb 5.

☐ Add a flight ☐ Add a car

☐ I need multiple places to stay

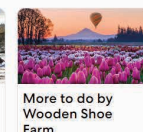
Search

Sponsored content by Mt. Hood Territory



Best Oregon spring activities

Spring is a time of rebirth. If you're like us, your wanderlust also grows by the second. It's been a rough few years, and you deserve a vacation to make new memories with family and friends. We know these times might feel financially uncertain. If you're watching your spending, you've come to a great place to about hotel savings, so you don't have to sacrifice one of a kind experiences, farm-fresh flavors and handcrafted goods. Do more with less.



Outcome 4: Organizational Resiliency

“Continue to develop organizational resiliency for effective tourism leadership”

Informed by COVID’s impact on Transient Room Tax revenue, this outcome focuses on organizational capacity to provide needed tourism programs and leadership responsive to the dynamic needs of the destination. Resiliency includes financial reserves to provide consistent tourism functions.

In FY22/23 we reached our goal for contingency reserve, **establishing a reserve that supports confident programming** and provides some stability from the short-term impacts of fluctuations in Transient Room Tax collection. The team also **added capacity and expertise** in communications, public relations, digital advertising and database management through industry leading contractors and passionate staff. Reaching this level of organizational stability and capacity expands the tourism resources available to partners and communities throughout Clackamas County and improves efficiencies.

Mt. Hood Territory Staff Team



Clackamas County Tourism brought back many of our **partner trainings and conference sponsorships** in FY 22/23, supporting our outcome of effective leadership of Clackamas County’s tourism industry. We brought back favorite in-person programs including the Annual Agritourism Summit and Frontline FAM Tours. We added new programs like Google Ad training to meet current partner needs. We had 104 partners attend our hosted trainings, and also provided sponsorships to allow 18 partners to attend specialized trainings and conferences beyond Mt. Hood Territory’s offerings.



In FY 22/23 we were able to **invest in data tools** to ensure strategic tourism development. Contracting with Datafy shows us visitor trends across industry sectors and geography of our region. We are already seeing the benefits of this investment, incorporating first-party data into audience targeting to **optimize our marketing**. Through the Mt. Hood Gorge Region we’ve also invested in Placer.ai visitor data. We are excited to **serve as a resource for local and community partners to get specialized data** to enhance their understanding of their own visitor trends.

Oregon's Mt. Hood Territory Clackamas County Tourism



TOURISM DEVELOPMENT COUNCIL

David Penilton – Chair

America's Hub World Tours
Oregon City

Luke Spencer – Vice Chair

Clackamas River Outfitters
Estacada

Caterine Connall Nyland

Best Western Agate Beach (remote)
Sandy

Tessa Koch

TMK Creamery & Distillery
Canby

Gail Yazzolino

End of the Oregon Trail Interpretive & Visitor Information Center
Oregon City

Holly Pfortmiller

Best Western Plus Rivershore
Oregon City

Katen Patel

K10 Hotels, Milwaukie Inn
Milwaukie

Samara Phelps - Executive Director

Clackamas County Tourism

MISSION

Enhance the quality of life for residents by optimizing the economic impacts of the tourism industry derived from the County's Transient Room Tax.

VISION

Serve as the leading force to grow and sustain tourism in Clackamas County through effective and efficient marketing and asset development strategies, and by building strong partnerships with businesses, organizations, other governmental entities and citizens.

FY 23/24 STRATEGIC OUTCOMES

Strategic outcomes from FY 22/23 were carried over to guide strategies for FY 23/24.

