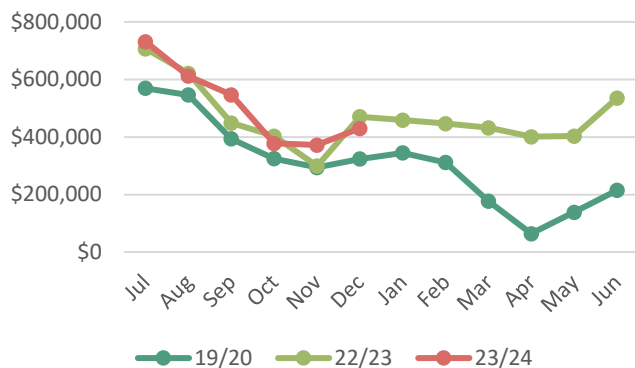


Q2 FY 23/24 QUARTERLY REPORT

This quarterly report presents industry trends and highlights some of Mt. Hood Territory's key projects during Q2 of FY 23/24, October – December 2023.

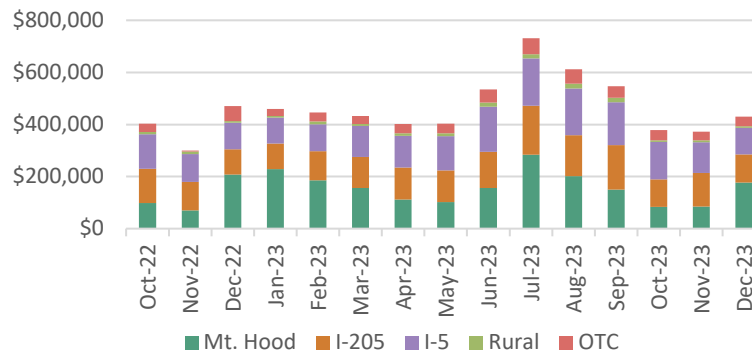
OF NOTE THIS QUARTER: Q2 marks the beginning of the winter season, but relatively mild weather throughout November and December meant that Mt. Hood was still awaiting snow to open ski areas at the end of the quarter.

Clackamas County TRT Earnings



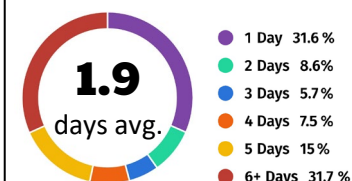
Data Source: Clackamas County Lodging Tax Collections

Clackamas County TRT Earnings By Region



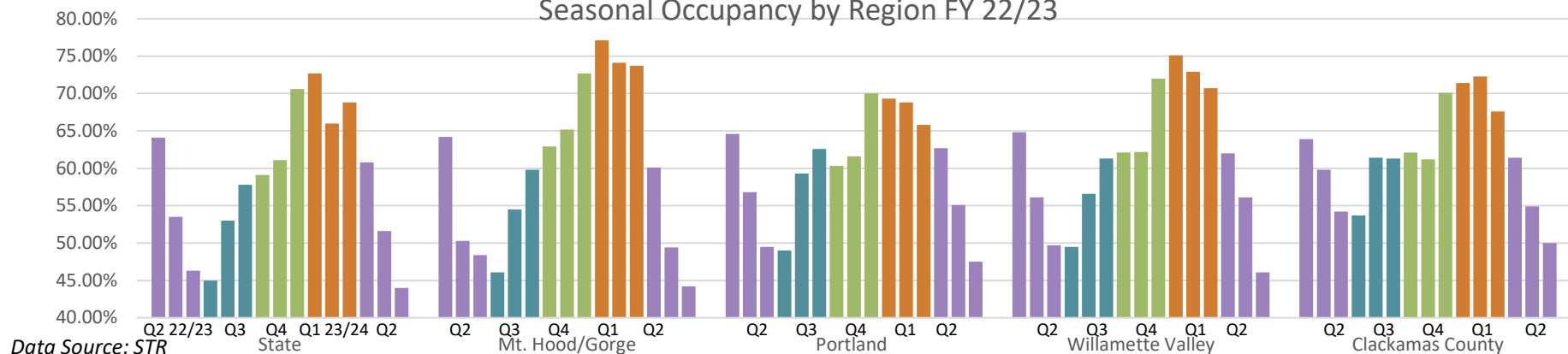
Data Source: Clackamas County Lodging Tax Collections

Length of stay Q2 23/24



↓ vs. **2.5** Q1 23/24
 ↓ YOY vs. **2.5** Q2 22/23

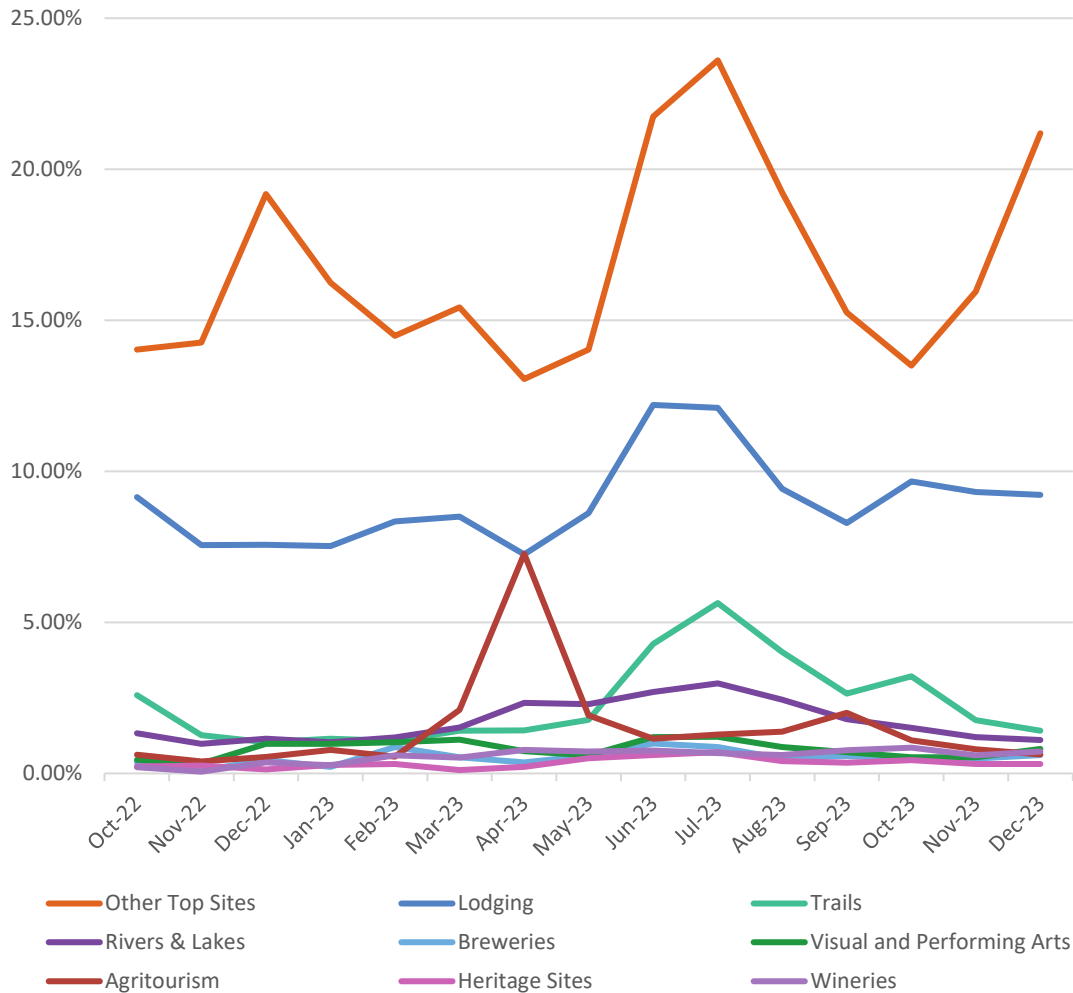
Seasonal Occupancy by Region FY 22/23



Data Source: STR

Q2 FY 23/24 - VISITOR TRENDS

Percentage of Visitors to Activity Type



Data Source: Datafy

* From 50+ miles away

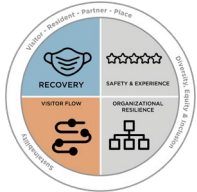
** Other Top Sites includes ski resorts and attractions that don't fit other categories

KEY TAKEAWAYS

- This data tracks the percentage of total visitors* to Clackamas County who visited certain types of attractions and sites.
- Agritourism drops in December after fall harvest season concludes and Visual and Performing Arts Sites has a boost in December, likely as more holiday performances take place during that period.
- YOY increases across activity types don't necessarily reflect more visitors but shows that visitors were likely to engage in activities across different categories.

Oct 23	change YOY	Nov 23	change YOY	Dec 23	change YOY
Other Top Sites 13.5%	↓	Other Top Sites 15.95%	↑	Other Top Sites 21.2%	↑
Lodging 9.67%	↑	Lodging 9.32%	↑	Lodging 9.22%	↑
Trails 3.22%	↑	Trails 1.77%	↑	Trails 1.42%	↑
Rivers & Lakes 1.51%	↑	Rivers & Lakes 1.2%	↑	Rivers & Lakes 1.11%	↓
Agritourism 1.1%	↑	Agritourism 0.8%	↑	Visual and Per... 0.81%	↓
Wineries 0.85%	↑	Wineries 0.6%	↑	Wineries 0.73%	↑
Visual and Per... 0.54%	↑	Visual and Per... 0.54%	↑	Agritourism 0.63%	↑
Breweries Cid... 0.51%	↑	Breweries Cid... 0.5%	↑	Breweries Cid... 0.61%	↑
Heritage Sites 0.44%	↑	Heritage Sites 0.31%	↑	Heritage Sites 0.31%	↑

Q2 FY 23/24 – PROJECT HIGHLIGHTS



HARVEST TRAIL

After hearing interest from agritourism partners in coming together to help promote each other, Mt. Hood Territory launched a pilot program of the Harvest Trail, a gamified passport connecting fall harvest festivals at 5 local farms. The passport encouraged people to visit multiple farms, participating in activities at each to earn a beanie and provide a Thanksgiving meal to a local family for each completed stamp card. Participating businesses expressed appreciation for the collaboration fostered by program, which supported the agritourism sector and encouraged shoulder season visitation to the destination with visitors from 22 cities and as far away as Puyallup, WA and Riverside, CA.

Throughout October, we promoted the Harvest Trail in local print and news media outlets and social media. It was also picked up by popular local social media accounts focused on family activities. In its first year the program surpassed expectations with 111 completed passports.



124 completed passports

214,000
Social Media Impressions

4,700
Social Media Engagements

5,200+
Web page views



RESIDENT SENTIMENT SURVEY

Mt. Hood Territory conducted a resident sentiment survey. Our last resident sentiment survey was conducted in 2019 as part of our Sustainable Destination Assessment from George Washington University. The 2023 survey followed up on the recommendation for regular resident sentiment monitoring and included questions from 2019 as well as new questions informed by the current tourism landscape.

1,847
Unique
Responses

80%
Completion
Rate

800+
Newsletter
Sign-Ups

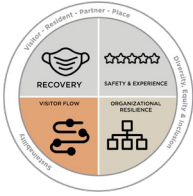
Clackamas County Public and Government Affairs helped us reach beyond our usual audiences, meeting our goal to have each region of the county well represented in responses. Responses from the survey were shared with tourism leads across Clackamas County's cities and regions.

Overall, the survey found that residents felt more negatively towards tourism in 2023 than they did in the original 2019 survey. However, residents still showed a high satisfaction with tourism's benefit, especially for local businesses. The survey also showed that residents felt their personal interactions with visitors were largely positive. The greatest negative impact cited in the survey responses was tourism's effect on the natural environment. Responses will inform the tourism planning process and help monitor destination health.

View the full resident survey responses here:

<https://www.mthoodterritory.com/full-county--final-report.pdf>

Q2 FY 23/24 – PROJECT HIGHLIGHTS



RESEARCH SHARING & COMMUNITY TOURISM LEAD MEETING



Community Tourism Lead/TDC Meeting

To serve as a resource for our local tourism community, Mt. Hood Territory shares our data with partners and community tourism leads. In Q2, we invited tourism leads from all of our communities as well as the Tourism Development Council to a joint meeting to share recent research, including our 2023 resident sentiment survey and destination insights from Datafy. Research findings were presented for the full county as well as divided into urban, mountain and valley regions for discussion with our community stakeholders.

To spread the benefits of our research and data to even more partners, Mt. Hood Territory and the Mt. Hood Gorge Region started hosting “research office hours.” Partners can book an appointment to dive into visitor trends for their specific site or community using Mt. Hood Territory’s contract with Datafy and the Mt. Hood Gorge Region’s contract with Placer.ai, a similar first-party data tracking platform.



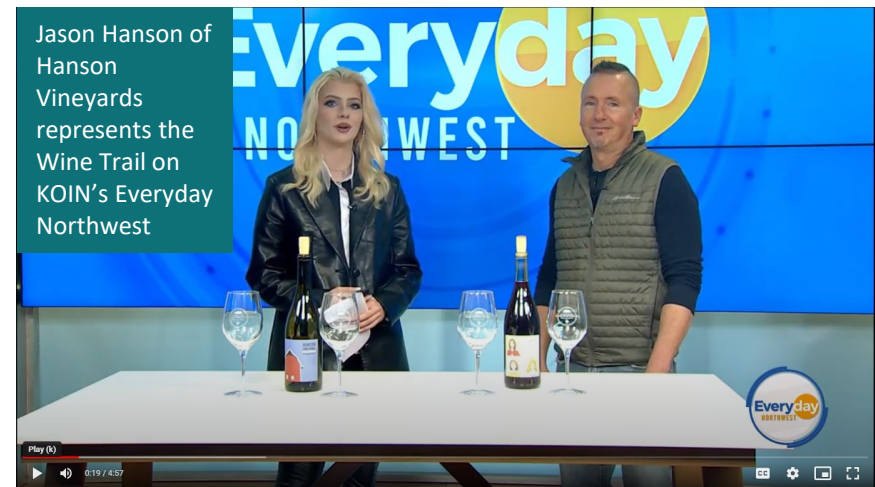
PARTNER PR MEDIA TRAININGS

Giving partners the opportunity to represent Mt. Hood Territory tells an authentic story of our destination by incorporating diverse voices. Beginning in Q2, we are now providing complimentary media training to partners that are invited to participate in broadcast opportunities through our contract with Lawrence PR. Media trainings help partners gain confidence and skills relevant beyond their media appearance with Mt. Hood Territory.



Media training is the most important way to ensure your message is being articulated clearly and concisely. Media training gives a spokesperson confidence, knowledge and the on-camera skills needed to provide a great interview for the media. The Lawrence PR team, many of them former journalists, are experts in the field and know exactly what the media needs to produce a good story.

-Lawrence PR



Q2 FY 23/24 - METRIC HIGHLIGHTS

PRIORITY MESSAGES

Our Q2 timeframe fell over one of Mt. Hood Territory's two shoulder seasons, so most of the messaging effort went toward supporting tourism industry recovery, our first strategic outcome. We promoted timely small businesses, such as museums, art galleries, family farms and local boutiques and restaurants. Several messages tied into the organization's product development work, such as our Adventure Trails. We also uplifted individual community efforts.

Message Highlights:

- Fall page
- Harvest Trail
- Tap Trail
- Oregon Trail for kids
- Holiday shopping
- Art galleries
- Highway 26 dining
- Sandy's covered patios



30,969,638

Impressions



1,603,470

Engagements



46,012

Partner Conversions

DATAFY MARKETING ATTRIBUTION

Datafy captures behaviors of visitors who were served our ads then traveled to the destination. The below attribution numbers show results of our advertising during Q2.



9,502

Room Nights



\$21,564,597

Visitor Spend



\$602.07 : \$1

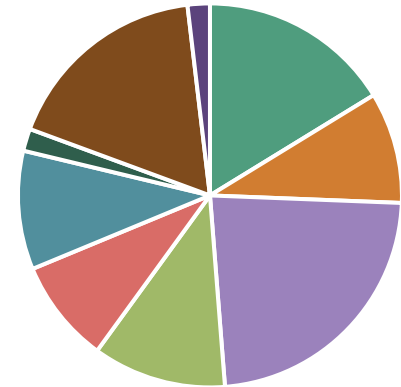
ROAS (Return on Ad Spend)

OPTIMIZATIONS & LEARNINGS

To boost consumer newsletter engagement, streamline our email list and ensure compliance with Google's stricter 2024 bulk emailer standards, we tackled email hygiene in Q2. We launched an incentivized email campaign to re-engage inactive subscribers and gather valuable user feedback about our monthly newsletter while removing inactive users. For an optimized user experience, we are A/B testing newsletter designs. A more responsive audience paves the way for future campaign success.

PARTNER ENGAGEMENT

Q2 included outreach around the Harvest Trail and Christmas tree farms, sharing research with community tourism groups, and updates to the shopping category of the website listings.



- Agritourism
- Recreation
- Food/Beverage
- Retail Shopping
- Lodging
- Heritage
- Art
- Community Organizations
- County Departments

160

Partners actively engaged with via email, phone or in person.

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

