

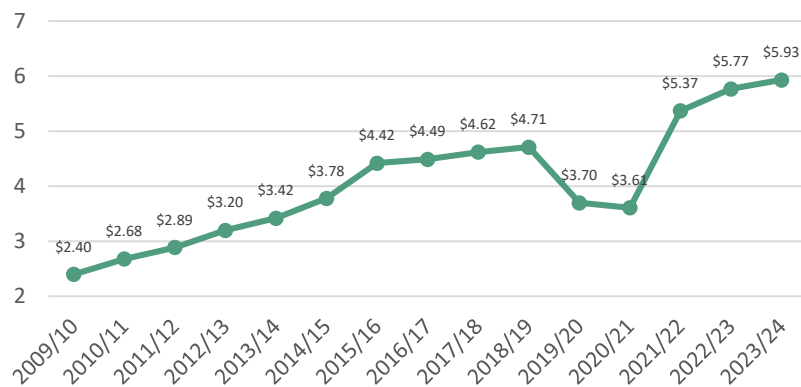


FY 23/24 ANNUAL REPORT

TRANSIENT ROOM TAX AND SMITH TRAVEL RESEARCH

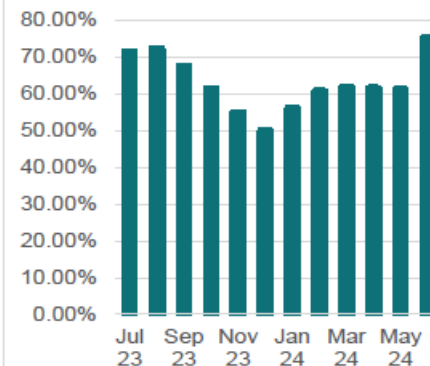
Clackamas County Tourism's mission is to improve the quality of life for residents by optimizing the economic impacts of the tourism industry. The statistics shared here are indicators of the industry's benefits as an economic driver.

Clackamas County TRT Revenue by FY
(\$millions)

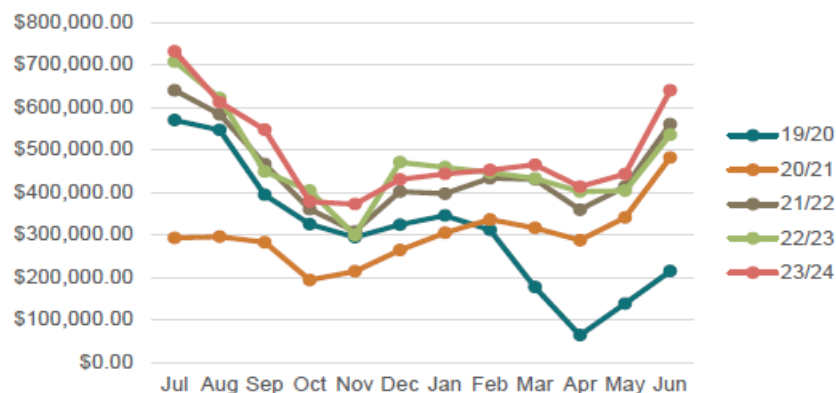


TRT earnings (left) continue to show strong recovery Yr/Yr at a similar pace to FY 22/23. Compared to last FY, seasonal occupancy (left) was a bit more balanced this year with June as the peak month, vs. last year it was July and August.

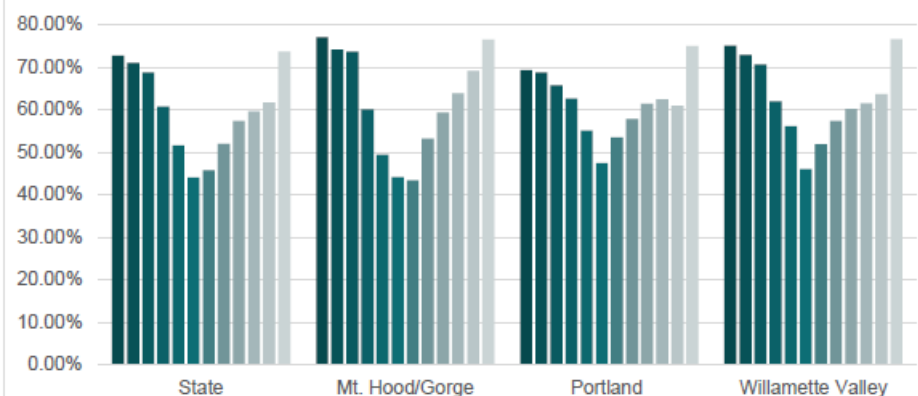
Clackamas County-
Seasonal Occupancy
% FY 23/24



Clackamas County TRT Earnings

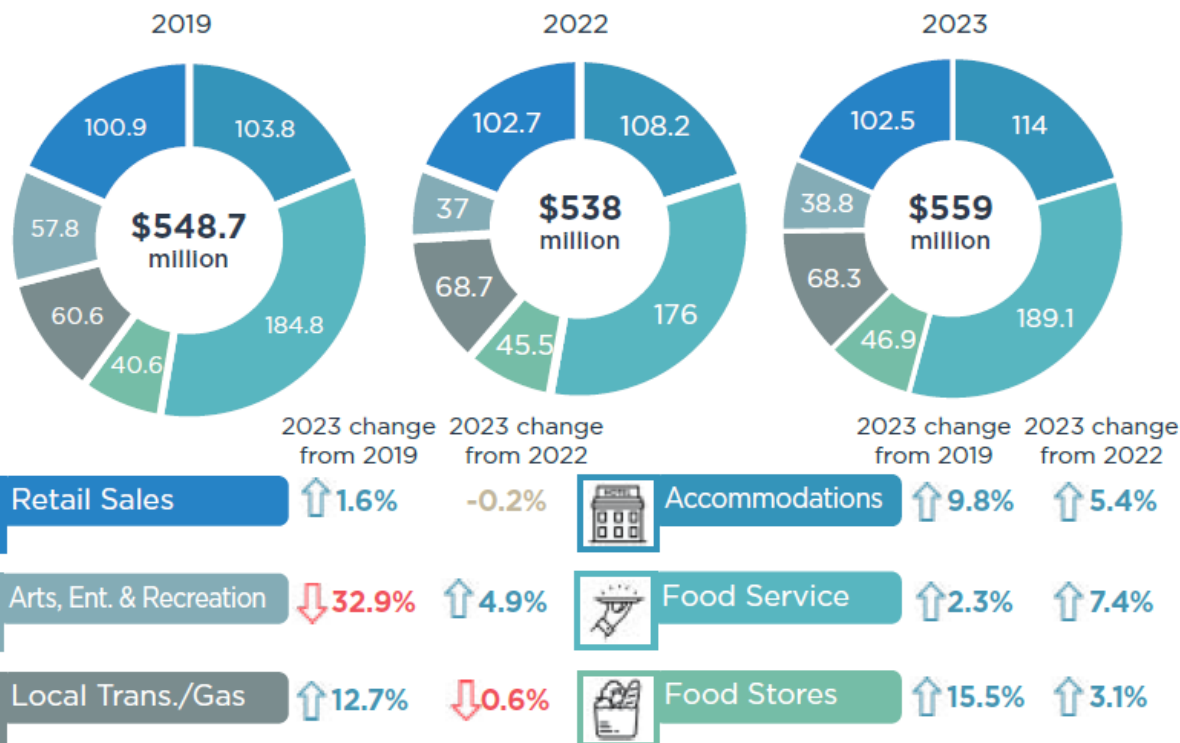
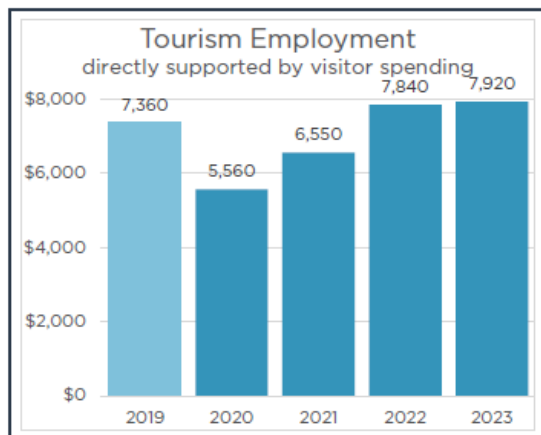
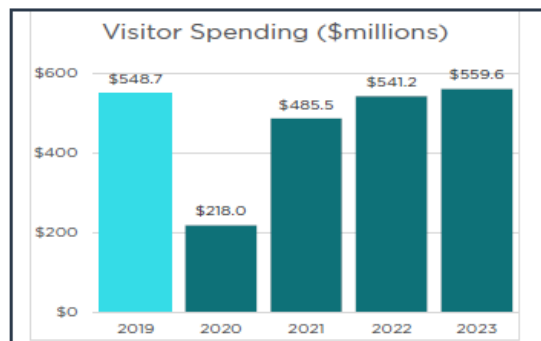


Seasonal Occupancy by Region FY 23/24



2023 ECONOMIC IMPACT MEASUREMENTS

VISITOR SPENDING BY SECTOR



LOCAL IMPACT

In 2023 the average visitor...



spent **\$60**

↑3% from 2019
(vs. \$58/day)

↑3% YOY from 2022
(vs. \$58/day)



stayed for **3.0** days

↑3% from 2019
(vs. 2.9 days)

↓3% YOY from 2022
(vs. 3.1 days)



Tourism generated
local taxes of **\$5.7M**

↓5% from 2019
(vs. \$6.0M)

↑3.5% YOY from 2022
(vs. \$5.5M)

FY 23/24 – DATAFY VISITOR TRENDS

While TRT is up Yr/Yr, Datafy is showing a decrease in annual visitation as well as a decrease in average length of stay in FY 23/24. When looking at length of stays, one and two day trippers increased while longer stay visitors to our county decreased. We also had a higher percentage of repeat visitors this year than last year. Visitors in this data are filtered as non-Clackamas County residents who are visiting from 50+ miles away.

Overview : 7/1/23 - 6/30/24



▼ -6.4%
vs. 7/1/22 - 6/30/23



▼ -22.6%
vs. 7/1/22 - 6/30/23



▼ -0.5 Days
vs. 7/1/22 - 6/30/23

Overview : 7/1/23 - 6/30/24

Mountain



▲ 2.6%
vs. 7/1/22 - 6/30/23



▼ -0.6 Days
vs. 7/1/22 - 6/30/23

Urban



▼ -10.2%
vs. 7/1/22 - 6/30/23



▼ -0.4 Days
vs. 7/1/22 - 6/30/23

Valley



▼ -11.2%
vs. 7/1/22 - 6/30/23

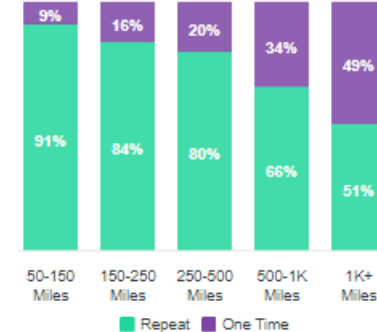


▼ -0.4 Days
vs. 7/1/22 - 6/30/23

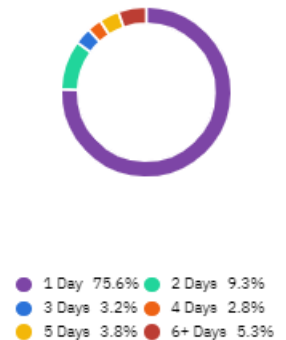
Comparison of Trips



Trips by Distance



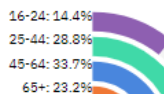
Trips by Length of Stay



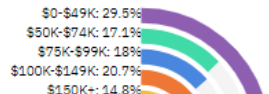
Avg Length of Stay: 2.2 Days

Visitor Demographics

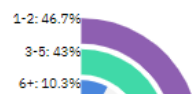
Age



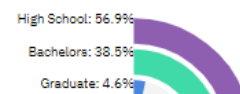
Income



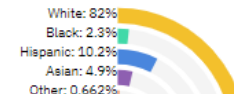
Household



Education Level

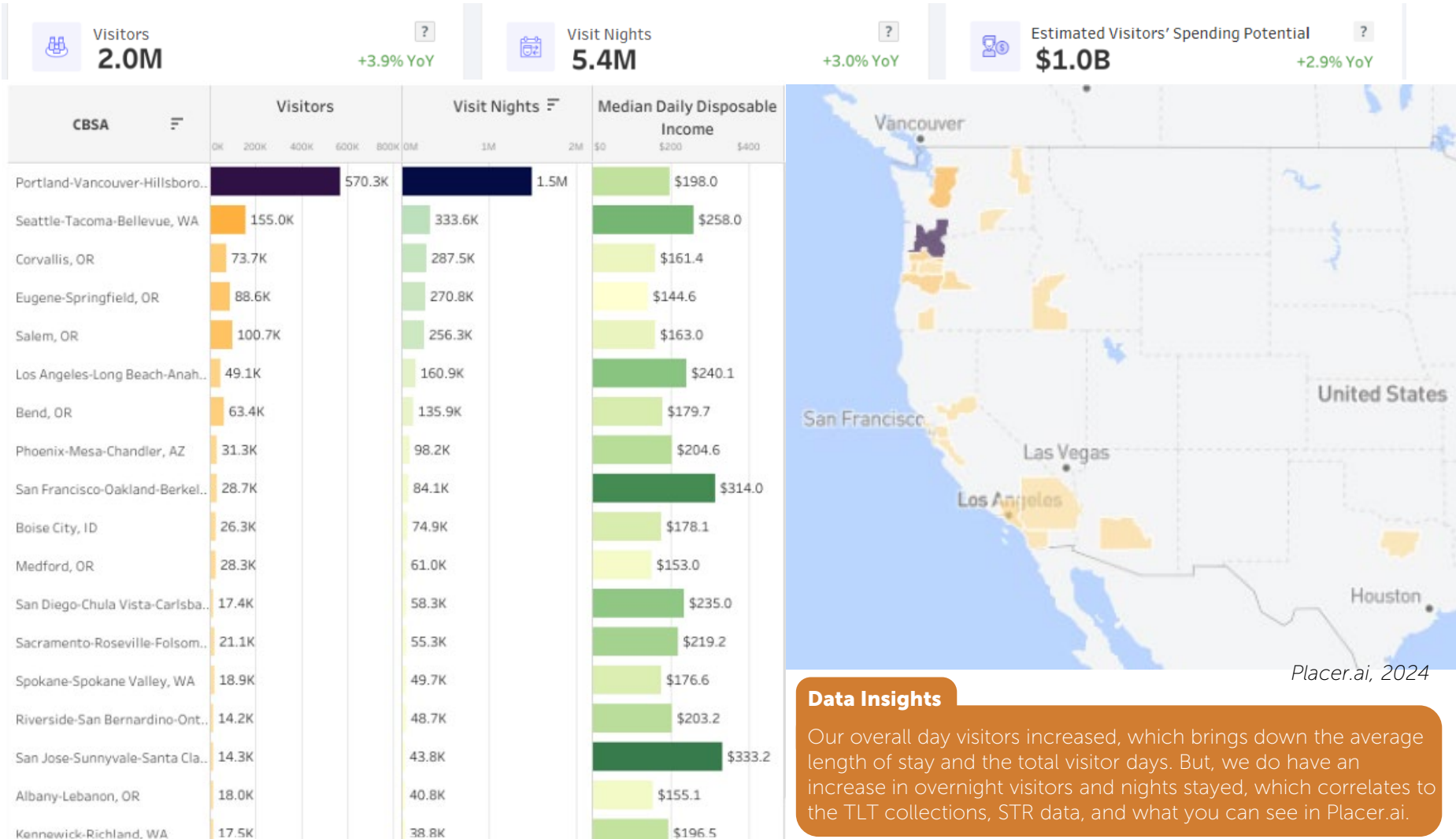


Ethnicity



FY 23/24 – PLACER.AI MARKET DATA

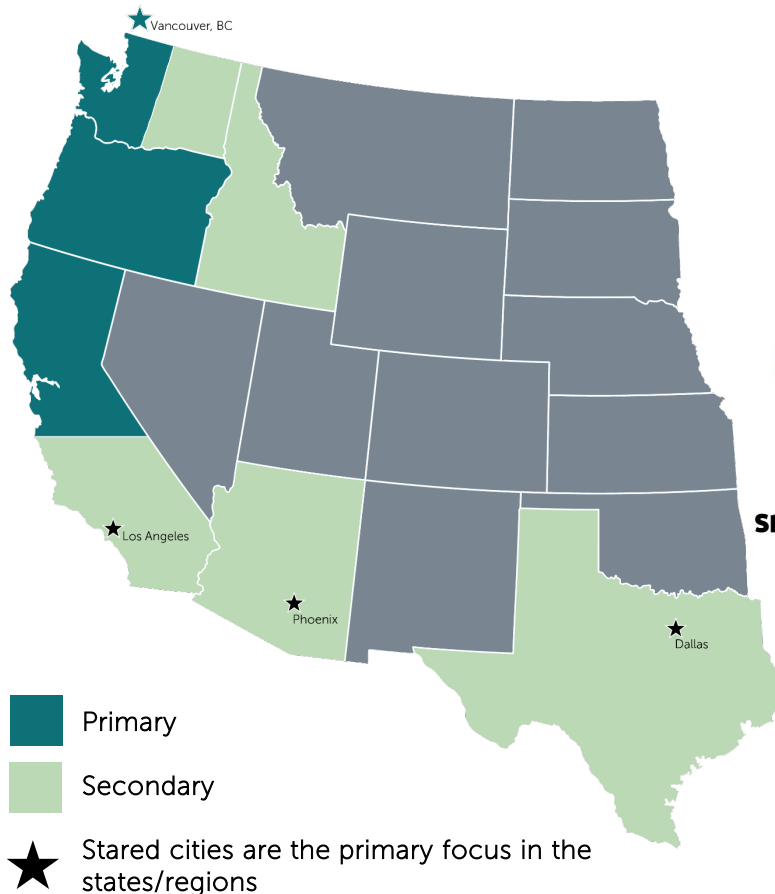
Placer.ai's data showcases where visitors came from that visited Clackamas County in FY 23/24 and the differences in their median disposable income. Visitors in the data below are defined as those from the US that spent the night in the county and stayed no more than 31 days. Compared to last year, we have notable increases across the board in overnight visitors, overnight visits, and potential spending from those visitors based on the disposable income of their markets. This means we attracted more high potential spending overnight visitors in FY 23/24 vs. FY 22/23.



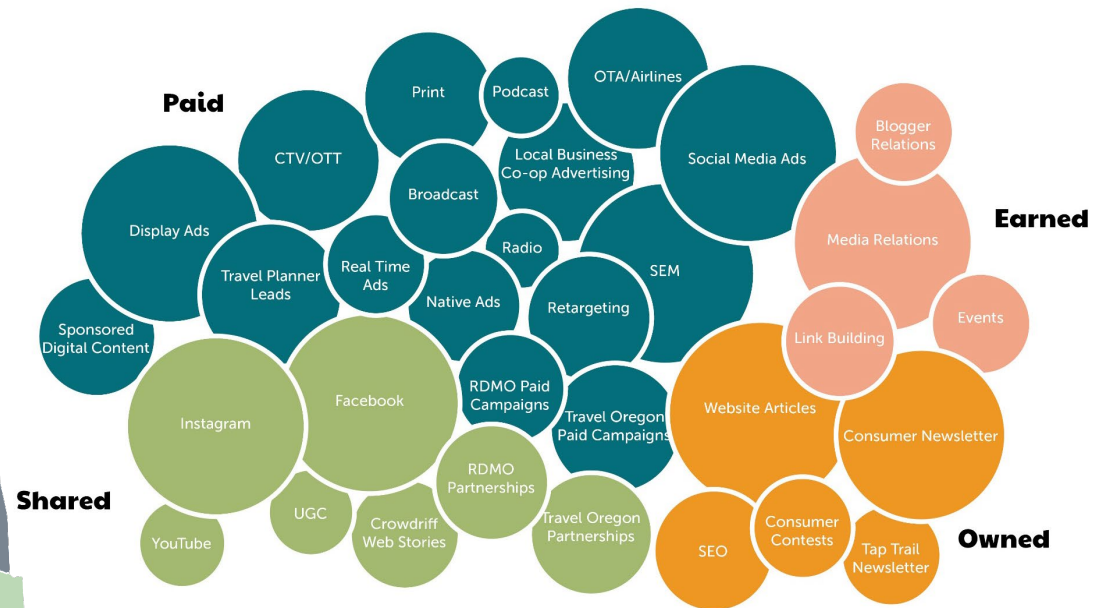
FY 23/24 – MARKETING OVERVIEW

The marketing team had a highly productive FY 23-24, the first complete year with a fully staffed team post-COVID, including a Marketing Program Lead, a Senior Communications and Content Specialist and a Senior Digital Marketing and Social Media Specialist. This increased capacity allowed the team to initiate procurement for key needs such as social media advertising services, travel planner production and search engine optimization. Additionally, the PR program was revitalized with Lawrence PR as the agency of record, leading to a significant increase in priority message impressions in Q3. By incorporating more short-form content alongside strategic long-form pieces, the team was able to feature more tourism partners and events across all regions compared to FY 22-23.

Geographic Markets



Marketing Mix



Note: Glossary of terms available in Appendix

FY 23/24 – MARKETING METRIC HIGHLIGHTS

PRIORITY MESSAGES

PEAK SEASONS: When promoting peak summer and winter seasons, the marketing team emphasized destination management messages aligned with the organizations strategic outcomes for safety and visitor flow. Key initiatives included encouraging midweek lodging, promoting 'Otter Dos,' advocating for guided experiences, highlighting dining and activities along Highway 26, promoting Molalla and Estacada recreational opportunities and supporting car-free travel options.

SHOULDER SEASONS: The marketing team strategically positioned spring and fall as desirable travel seasons, actively supporting small businesses and communities across all regions to advance tourism recovery, one of the organization's strategic outcomes. In addition to highlighting Development Team products like the Harvest Trail and Tap Trail, we spotlighted museums, art galleries, visitor-facing farms, local boutiques and restaurants.



190,384,939

Impressions



11,441,754

Engagements



195,161

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 advertising attribution results during FY 23-24.



48,364

Room Nights



\$69,392,400

Visitor Spend



\$525.82 : \$1

ROAS (Return on Ad Spend)

EVENTS

Clackamas County Tourism recognizes events' critical role as destination drivers, experience enhancers and platforms for communities to celebrate their authentic identity, including through diversity, equity and inclusion. In FY 23-24, our team made significant strides in increasing the number of events promoted through our website's events calendar and broadening the variety of event types represented across the destination and its regions.



496

Events

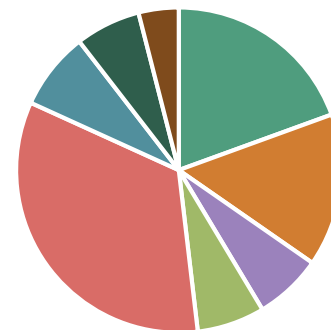


164%

Yr/Yr Increase

PARTNER PROMOTION

Partners from all tourism pillars and regions were highlighted across every marketing program channel, including media and influencer outreach, original content creation on mthoodterritory.com, social media and digital advertising.

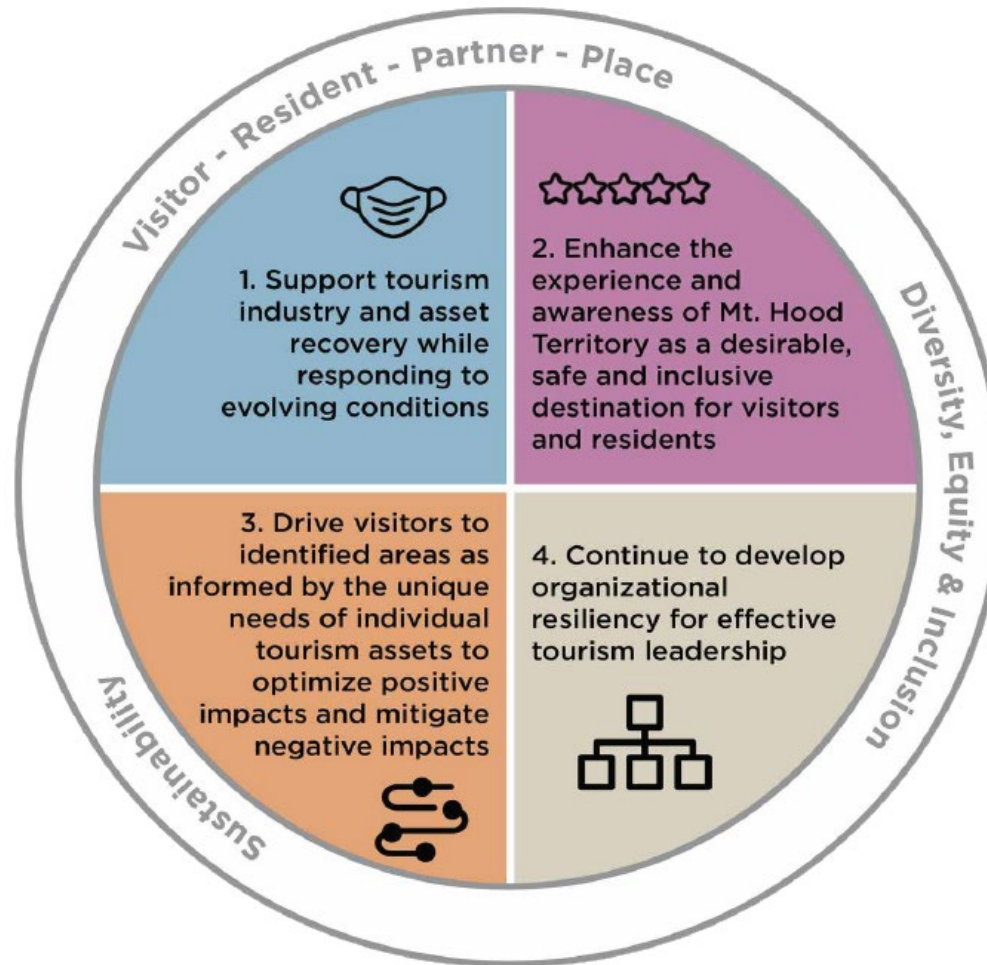


401

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

FY 23/24 – STRATEGIC OUTCOMES

Clackamas County Tourism's four key strategic 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).



FY 23/24 – STRATEGIC 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 their ongoing impacts and related events.

FY 23/24 marked the sunset of Clackamas County's Business Recovery Centers (BRC) program. Clackamas County Tourism (CCT) was crucial in promoting the Centers' efforts to attract visitors and aid industry recovery. CCT partnered with the West Linn and Lake Oswego BRC to market their Wander Willamette campaign with Here Is Oregon and KOIN. CCT employed a variety of marketing elements, including on-site TV segments at partner businesses, in-studio appearances with TV hosts, custom digital content, display ads and social media posts.



150M+
Impressions



7.5K+
clicks to
wanderwillamette.com

Shatrine Krake, the Business Recovery & Resource Director, expressed her gratitude, stating:
"Partnering with Clackamas County Tourism has been instrumental in bringing visitors back to West Linn and Lake Oswego."

In FY 23/24 Clackamas County Tourism offered partners numerous trainings and conference scholarships to support our strategic outcome of providing direct support to partners and effective leadership of Clackamas County's tourism industry. We brought **43 partners** on FAM Tours to **12 visitor-facing tourism businesses**. Through our scholarship opportunities we helped **11 partners** attended the 2024 Oregon Governors Conference on Tourism and **5 partners** attend the 2023 Oregon Main Street Conference. **Twenty agritourism partners** attend OMHT's 2024 Agritourism Summit. Our Strategic Investment Program webinars, Datafy demonstrations, Google Ad, and Accessibility Trainings for Visitor-Facing businesses were also of considerable interest to partners, with total combined attendance of about **80 partners**.



FY 23/24 – STRATEGIC OUTCOMES

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.

This spring Clackamas County Tourism partnered with industry leader Travel Unity for board and staff training on inclusion work specific to the tourism sector. Their mission to make travel welcoming to people of all backgrounds aligns with our priority to enhance the experience of our destination as safe and inclusive for visitors and residents. Our work together includes actionable next steps to strengthen partner engagement, authentically represent the destination, expand audience and increase representation in our programs. Support from Travel Unity continues through spring of FY24/25.

FY23/24 marked our second year distributing emergency kits to vacation rental properties. We distributed over **150 kits** this year alone. We have now provided **405 emergency kits** to **249 vacation** rental properties that will serve a total of **2,000 visitors** in case of a variety of natural disasters. This increases our destinations effectiveness in responding to a disaster while supporting 2,000 visitors in 'sheltering in place' scenarios in the event of a natural disaster. Our value being met is increased safety of every visitor who stays in a property.

Watch a video highlighting the emergency kits project



Disaster Management Operations
 Coordinator Brenna Cruz:

"By equipping rental properties with emergency kits and evacuation maps, we significantly improved the readiness of both residents and visitors. This project has not only enhanced individual preparedness but also fostered a greater sense of community resilience."

FY 23/24 – STRATEGIC OUTCOMES

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.

In FY 23-24, our marketing efforts successfully extended the economic impact of the Wooden Shoe Tulip Festival by inspiring visitors to explore other areas of Clackamas County. The marketing team encouraged longer stays and greater local engagement by strategically redirecting festival attendees to nearby attractions and experiences. Through a well-crafted mix of promoted content, social media posts, YouTube videos and a partnership with the Willamette Valley Visitors Association, Clackamas County Tourism effectively showcased the diverse offerings of this vibrant region.



10.5k+

YouTube views

97% completion rate



558 clicks

To partner websites



Our international travel trade work continues to grow, building relationships through the two business-to-business shows as well as a consumer show in Vancouver, B.C. This past year alone saw a record **14 contracts** signed, with hotel, activity and even vacation rental partners working with receptives, tour operators and travel agencies overseas. International FAM tours also paid off big as Mt. Hood Territory was able to secure **two more group tour contracts** with Globus and Destination America, adding TMK Creamery and Terra Vina Wines to their 2025 tour schedules.



FY 23/24 – STRATEGIC OUTCOMES

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.

Clackamas County Tourism provides countywide tourism leadership through data informed programs, investing in county-wide tools and research and providing leaders across the community with access to this information. To make these tools more accessible to partners, this year staff started research happy hours where partners meet one on one with a staff member who helps gather data specific to their needs. Partners are able to access tools like Datafy and Placer.ai, resident and stakeholder surveys and US Travel's information. Looking to improve transparency about our programs and access to information, we are partnering with Tourism Economics to develop a dashboard of Clackamas County specific information. Reporting using this tool begins in FY24/25.

In alignment with our mission to improve the quality of life for residents, Clackamas County Tourism conducted a Clackamas County specific resident sentiment survey to better understand locals' feelings about tourism. Over **1,800 local residents** completed the survey allowing us to provide community leads with responses specific to their communities. In general, residents continue to report high satisfaction with the tourism industry's benefit and report personal interactions with visitors as positive. The greatest negative impact cited was the effect on the natural environment. These and other findings inform Clackamas County Tourism planning, priorities and programs.

This year the Tourism Development Council adopted updated 5-year strategic priorities. Informed by research, data, industry trends and best practices that include the resident, visitor and partner perspective and considering the impacts on place. These priorities keep tourism programs relevant to the community needs guiding the work of the TDC and staff annually. Efforts in FY24/25 and beyond will support the mission and master plan by addressing these priorities. View the 5-year strategic priorities: <https://www.mthoodterritory.com/final-strategic-priorities-objectives-and-strategies-2024.pdf>



DATAFY



Placer.ai

SYMPHONY | TOURISM ECONOMICS

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

Catherine 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

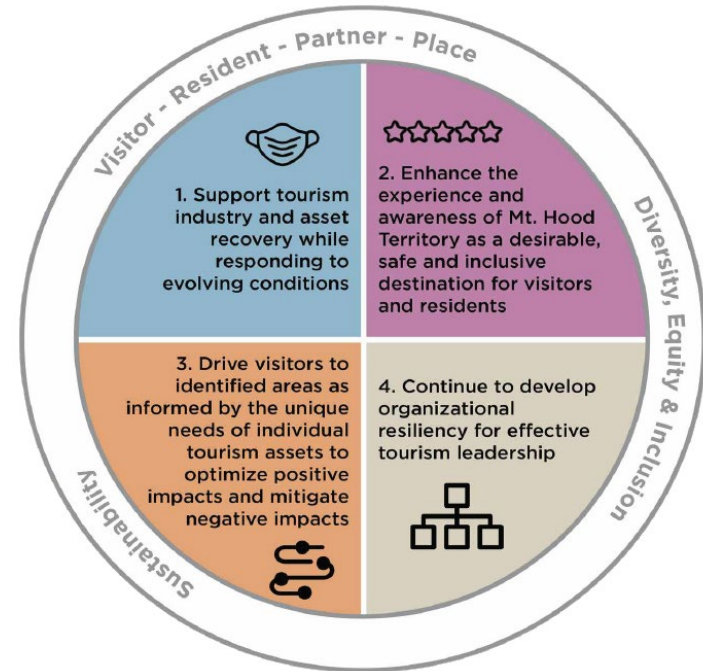
MISSION

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



APPENDIX: GLOSSARY OF TERMS

Consumer Contests

Clackamas County Tourism employees contests to increase potential visitor awareness, engagement and conversions, such as signing up for the consumer newsletter or ordering a travel planner. In FY 23-24 they were also used to re-engage potential visitors and past visitors who were already signed up for the consumer newsletter, but had not opened an email in six months.

Crowdriff Web Stories

Google now has its own form of visually driven content called Google Web Stories. Crowdriff, visual content marketing software for travel and hospitality brands, offers a tool that allows Clackamas County Tourism to easily turn content into short-form videos for Google Web Stories. The team can then embed those stories into the website for further user engagement.

CTV/OTT

CTV is short for "connected TV" and is a marketing term that describes video advertisements on televisions connected to the internet. CTV includes smart TVs, TV streaming devices and gaming consoles. Viewers can access digital content on these devices through built-in apps or external platforms such as Roku, Apple TV, or Amazon Fire Stick. OTT, "over-the-top" is also related to streaming video, but CTV is limited to TV screens, while OTT can be accessed on almost any device with a screen.

Link Building

Acquiring links from authority sites that go to mthoodterritory.com pages. This is a search engine optimization best practice. Clackamas County Tourism most actively acquires these links while earning digital stories through media relations efforts.

Local Business Co-op Advertising

This term refers to Clackamas County Tourism's marketing co-op program that supports local tourism businesses and city-level DMOs.

Native Ads

A native ad is paid advertising designed to blend in with the look and feel of the content they appear in. An example is an ad appearing in an e-newsletter that looks like the other stories promoted in it.

OTA

OTA stands for "online travel agency" and refers to businesses that allow users to search for and book travel products such as air tickets, lodging, car rentals and tours, such as Expedia, TravelZoo and Kayak.

RDMO Paid Campaigns

Portland Region, Willamette Valley Visitors Association or Experience Mt. Hood & The Gorge paid marketing campaigns Clackamas County Tourism participates in (either free to us or a paid partnership with the Region).

RDMO Partnerships (Shared)

Clackamas County Tourism pitches and partners with Travel Portland, Willamette Valley Visitors Association and Experience Mt. Hood & The Gorge, so they share posts, Stories and Reels and Mt. Hood Territory across social media channels.

Real Time Ads

Clackamas County Tourism participates in real-time ads that are meant to help visitors while they are in the destination, from tips about safety to less crowded trails and attractions. The ads are geofenced, so visitors need to be in the local area to receive them.

Retargeting

These are ads aimed at re-engaging users who have previously interacted with a brand or visited a website but did not complete a desired action. These ads are designed to "follow" the user as they browse other websites or use apps and provide them with additional information that motivates them to take action, such as booking a stay or signing up for a travel planner.

SEM

This term stands for search engine marketing, a digital marketing strategy that uses paid advertising to improve a website's visibility in search engine results.

SEO

This term stands for search engine optimization, the process of improving a website's content and structure to help search engines and users find it.

APPENDIX: GLOSSARY OF TERMS CONTINUED

Tap Trail Newsletter

Clackamas County Tourism sends tailored quarterly newsletters to Tap Trail participants, notifying them of Trail partner specials and other relevant beverage news to boost engagement.

Travel Oregon Paid Campaigns

Travel Oregon paid marketing campaigns Clackamas County Tourism participates in (either free to us or a paid partnership with Travel Oregon).

Travel Oregon Partnerships (Shared)

Clackamas County Tourism pitches and partners with Travel Oregon, so they share posts, Stories and Reels and Mt. Hood Territory across social media channels.

UGC

This term refers to user generated content, which is any form of content, such as images, videos, text and audio, created and shared by users on an online platform. Clackamas County Tourism actively searches for and encourages user generated content across social media platforms.