

Q3 FY 24/25 QUARTERLY REPORT

This quarterly report presents industry trends and highlights some of Mt. Hood Territory's key projects during Q3 of FY 24/25, January – March 2025.

Executive Summary

FY Q3 2025



Highlights

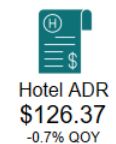
During the Q3 of FY 25, TRT collections saw negative results across the county's sub-regions. The I-5, OTS, and Rural submarkets posted YoY TRT losses every month of FY Q3 2025. TRT Collections began fiscal year trending ahead of FY 2023 and 2024 levels, though after December, levels are closely following FY 2022 levels. Though the Mt. Hood Region showed double-digit growth in both January and February before declining again in March. Total TRT collections were up 2.7% in January, though the following two months posted declines of 3.6% and 2.4% respectively. The I-205 region was the only other outside of Mt. Hood to have a positive growth month, though this occurred in March and increased by 0.9%. The most notable decline came from the rural region seeing TRT decline by -30.6% YoY

When comparing quarter-to-date data versus the previous year, hotel performance in Q3 had negative results. All KPI's display YoY losses when compared to the previous year quarter-to-date. -4.2% RevPAR loss was driven by a -7.5% loss in demand, as opposed to a 0.7% decrease in ADR. Despite declining demand, a 4.1% decline in supply men that occupancy for the market only declined 3.5% in Q3. Despite rate only falling slightly, revenue still declined 8.1% due to a sharp decline in YoY shoulder season demand. Compared to Q3 of last fiscal year, the only LOS segment change was a 1% decrease in guests staying 6+ days

Clackamas County takes over as region occupancy and ADR leader from Portland and Mt. Hood, as the market enters the shoulder season of demand. During Q3, it was the only region that displayed YoY occupancy growth when compared to FY Q3 the previous year. All regions posted ADR declines when compared to FY Q3 of the previous year, with Clackamas staying flat while Regions like Willamette Valley saw up to 14.4% declines.

Overseas arrivals to the US grew 5.4% in January but saw a 2.34% decline in February and a greater 11.6% drop in March representing the first meaningful decline since the pandemic. Easter - which shifted from March last year to April this year - contributed to weakness. Most notable were declines in visits from Mexico and Canada.

Despite economic headwinds and declines in international visits, air travel held steady for the first quarter with a slight increase of 0.9% for the first quarter of the calendar year compared to the same time last year. This quarter compared to the same quarter in 2024, US hotel occupancy was 58.4%, a 1.3% increase ADR saw a 6% jump whilst RevPAR rose by 7.4% to \$92.



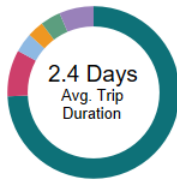
Q3 FY 24/25 – RESEARCH & DATA

Summary Report

FY Q3 2025



Average Trip Duration



1 day: 74%
2 days: 9%
3 days: 4%
4 days: 3%
5 days: 4%
6+ days: 6%



Vs. **2.5**
QOQ Q2 24/25

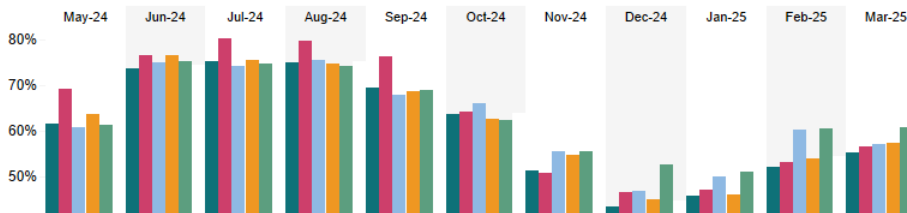


Vs. **2.4**
YOY Q3 23/24

Source: Datafy

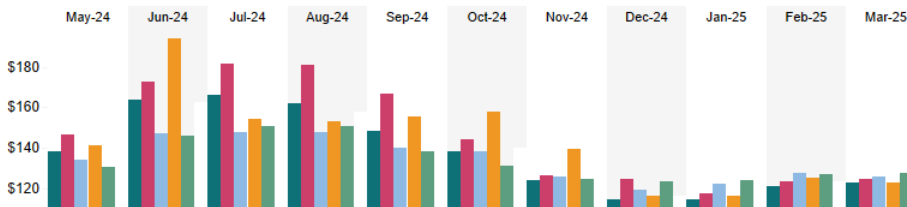
OCC by Region

Statewide Mt. Hood/Gorge Portland Willamette Valley Clackamas



ADR by Region

Statewide Mt. Hood/Gorge Portland Willamette Valley Clackamas



Source: STR

TRT By Region

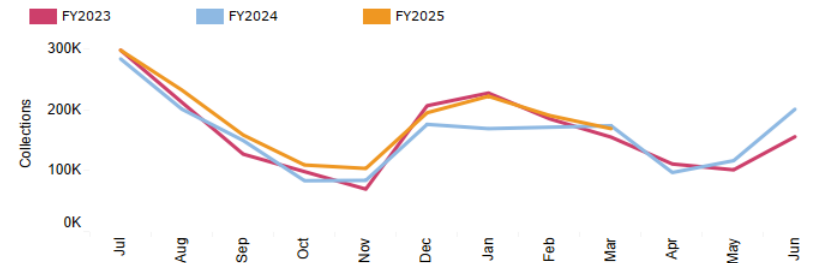
| | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun |
|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|-----|-----|-----|
| I-5 | \$192.6K | \$207.2K | \$155.5K | \$143.8K | \$112.6K | \$112.7K | \$104.5K | \$104.3K | \$118.6K | | | |
| I-205 | \$178.3K | \$161.8K | \$166.2K | \$129.5K | \$104.4K | \$101.8K | \$92.5K | \$98.2K | \$121.5K | | | |
| Mt. Hood | \$298.4K | \$232.8K | \$158.8K | \$109.4K | \$103.7K | \$195.5K | \$222.6K | \$190.9K | \$169.3K | | | |
| OTC | \$64.0K | \$60.5K | \$42.5K | \$38.4K | \$33.0K | \$38.2K | \$30.8K | \$33.7K | \$37.7K | | | |
| Rural | \$20.6K | \$17.5K | \$16.5K | \$6.5K | \$4.8K | \$6.0K | \$4.7K | \$8.8K | \$6.6K | | | |
| Total | \$753.9K | \$679.8K | \$539.5K | \$427.6K | \$358.5K | \$454.2K | \$455.1K | \$435.9K | \$453.7K | | | |

% Change YOY

| | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun |
|----------|--------|--------|-------|--------|--------|--------|--------|--------|--------|-----|-----|-----|
| I-5 | +5.2% | +15.3% | -5.9% | -0.4% | -4.5% | +9.8% | -13.6% | -15.2% | -2.6% | | | |
| I-205 | -4.8% | +3.0% | -2.7% | +22.6% | -19.5% | -5.9% | -18.0% | -12.7% | +0.9% | | | |
| Mt. Hood | +5.0% | +15.6% | +6.0% | +31.0% | +23.3% | +10.8% | +31.5% | +11.2% | -2.7% | | | |
| OTC | +3.9% | +9.5% | -3.7% | -1.0% | -1.3% | +3.9% | -9.5% | -6.0% | -3.3% | | | |
| Rural | +32.8% | -5.3% | -3.8% | +15.1% | -31.0% | -3.7% | -23.2% | -5.1% | -30.6% | | | |
| Total | +3.0% | +11.1% | -1.4% | +13.1% | -3.6% | +5.6% | +2.7% | -3.6% | -2.4% | | | |

TRT Earnings by Month

Last Four Fiscal Years



Source: Oregon's Mt Hood Territory

Q3 FY 24/25 – RESEARCH & DATA

Hotel Review

FY Q3 2025



Clackamas FY Q3 2025 Performance

Quarter-to-Date vs. Previous Year Quarter-to-Date

| | | | | | |
|-----------|-------|--------|--------|--------|---------|
| Occupancy | ADR | RevPAR | Supply | Demand | Revenue |
| 57.4% | \$126 | \$73 | 227.5K | 130.6K | \$16.5M |
| -3.5% | -0.7% | -4.2% | -4.1% | -7.5% | -8.1% |

Performance by Month

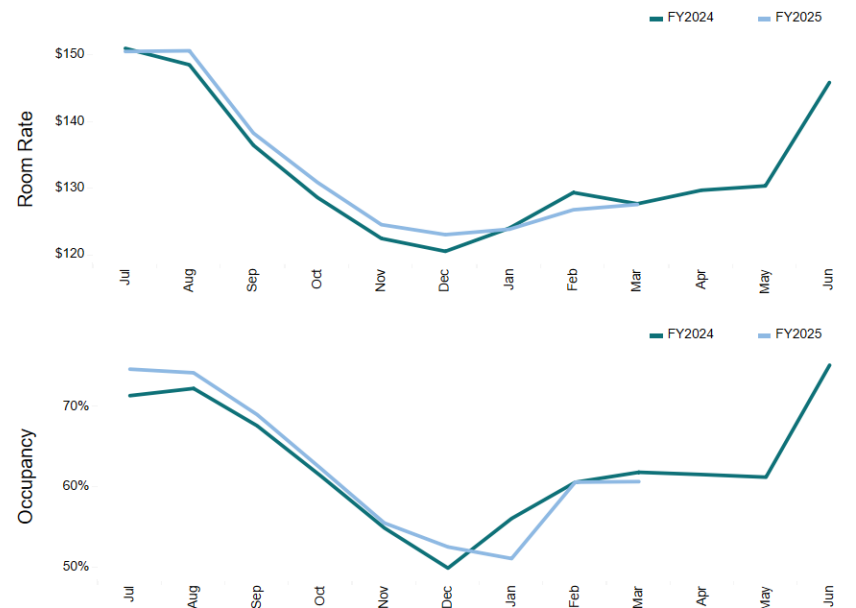
| | OCC | YOY% | ADR | YOY% | RevPAR | YOY% | |
|-----|-----------|-------|-------|-------|--------|------|-------|
| Jan | Clackamas | 51.2% | -8.9% | \$124 | -0.1% | \$63 | -9.0% |
| Feb | Clackamas | 60.6% | +0.0% | \$127 | -2.0% | \$77 | -2.0% |
| Mar | Clackamas | 60.7% | -1.9% | \$128 | -0.1% | \$78 | -2.0% |

Source: STR

Fiscal Year-to-Date Performance

Clackamas

| | | | | | |
|-----------|-------|--------|--------|--------|---------|
| Occupancy | ADR | RevPAR | Supply | Demand | Revenue |
| 62.5% | \$135 | \$84 | 704.8K | 440.3K | \$59.3M |
| +1.1% | +0.9% | +2.0% | -2.5% | -1.4% | -0.5% |



Powered by SYMPHONY | TOURISM ECONOMICS

NOTE: Q3 we started to see dips in occupancy, ADR, and RevPAR for hotel lodging, January being the softest of the three months.

Q3 FY 24/25 – RESEARCH & DATA

Hotel Competitive Performance

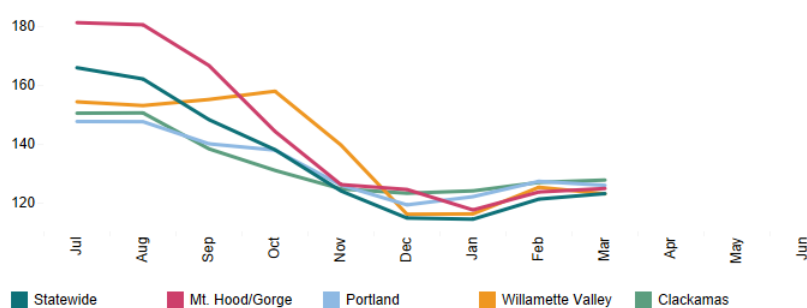


Clackamas FY Q3 2025 Performance

| | | OCC | YOY% | ADR | YOY% |
|-----|-------------------|-------|--------|-------|-------|
| Jan | Clackamas | 51.2% | -8.9% | \$124 | -0.1% |
| | Mt. Hood/Gorge | 47.3% | +9.1% | \$118 | +6.5% |
| | Portland | 50.2% | -6.2% | \$122 | -1.5% |
| | Statewide | 45.9% | +0.5% | \$114 | -1.4% |
| | Willamette Valley | 46.2% | -11.0% | \$116 | -1.4% |
| Feb | Clackamas | 60.6% | +0.0% | \$127 | -2.0% |
| | Mt. Hood/Gorge | 53.3% | +0.1% | \$124 | +3.6% |
| | Portland | 60.4% | +4.3% | \$127 | -1.6% |
| | Statewide | 52.3% | +0.5% | \$121 | -1.5% |
| | Willamette Valley | 54.0% | -5.9% | \$125 | +0.3% |
| Mar | Clackamas | 60.7% | -1.9% | \$128 | -0.1% |
| | Mt. Hood/Gorge | 56.7% | -4.4% | \$125 | +1.3% |
| | Portland | 57.1% | -7.1% | \$126 | -4.7% |
| | Statewide | 55.5% | -3.3% | \$123 | -3.2% |
| | Willamette Valley | 57.3% | -4.8% | \$123 | -3.5% |

ADR by Market

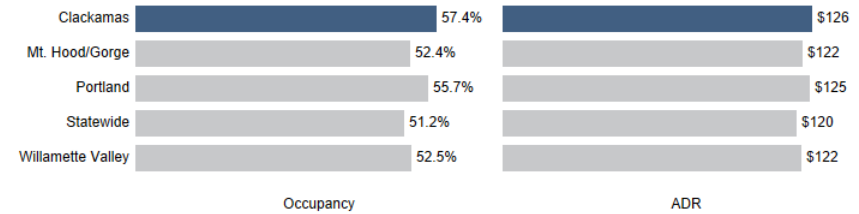
Fiscal Year-to-Date



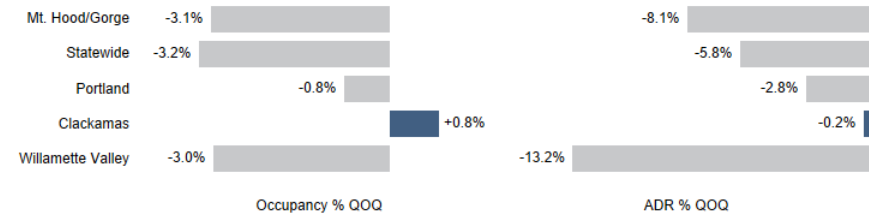
Source: STR

Quarter-to-Date Performance

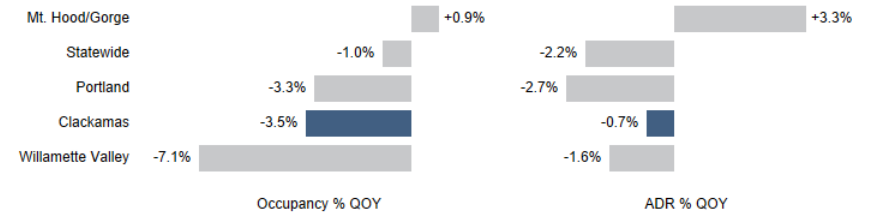
Performance by Market



% Change vs. Previous Quarter



% Change vs. Previous Year



Q3 FY 24/25 – RESEARCH & DATA

Visitor Trends

FY Q3 2025



January

Cluster Visitation

| Cluster | Visitor Days |
|---------------------------------|--------------|
| Clackamas County Communities | 802,499 |
| Parks & Recreation Land | 180,946 |
| Main Streets | 165,218 |
| Other Top Sites | 159,343 |
| Lodging | 86,968 |
| Visual and Performing Arts | 12,043 |
| Trails | 11,317 |
| Wineries | 9,955 |
| Breweries Cideries Distilleries | 7,696 |
| Rivers & Lakes | 7,375 |
| Agritourism | 7,361 |
| Heritage Sites | 5,679 |

February

Cluster Visitation

| Cluster | Visitor Days |
|---------------------------------|--------------|
| Clackamas County Communities | 725,711 |
| Parks & Recreation Land | 148,921 |
| Main Streets | 146,326 |
| Other Top Sites | 129,095 |
| Lodging | 78,901 |
| Wineries | 12,481 |
| Breweries Cideries Distilleries | 10,640 |
| Trails | 10,618 |
| Visual and Performing Arts | 10,040 |
| Agritourism | 7,075 |
| Rivers & Lakes | 5,822 |
| Heritage Sites | 4,559 |

March

Cluster Visitation

| Cluster | Visitor Days |
|---------------------------------|--------------|
| Clackamas County Communities | 924,087 |
| Main Streets | 260,064 |
| Parks & Recreation Land | 235,098 |
| Other Top Sites | 190,842 |
| Lodging | 109,017 |
| Agritourism | 63,217 |
| Wineries | 28,893 |
| Visual and Performing Arts | 15,086 |
| Trails | 11,482 |
| Breweries Cideries Distilleries | 9,595 |
| Rivers & Lakes | 8,211 |
| Heritage Sites | 5,962 |

Source: Datafy

Powered by SYMPHONY | TOURISM ECONOMICS

This data is filtered for visitors from 50+ miles away.

Q3 FY 24/25 – RESEARCH & DATA

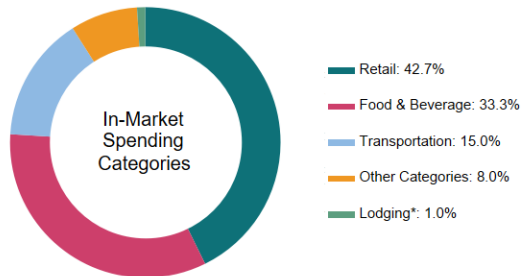
Visitor Spending

FY Q3 2025



Visitor Credit Card Spending

Card Spend
\$175.4M
 -3.2% QOY

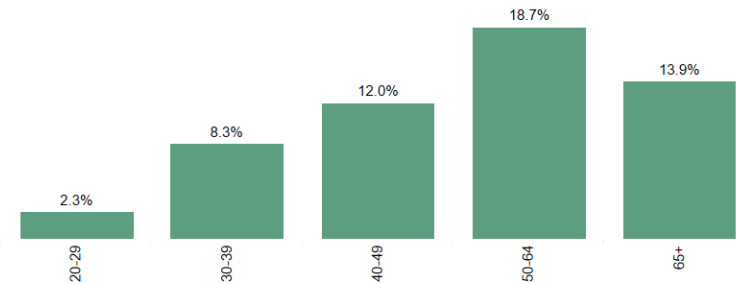


*Lodging spend represents in-market spend only.

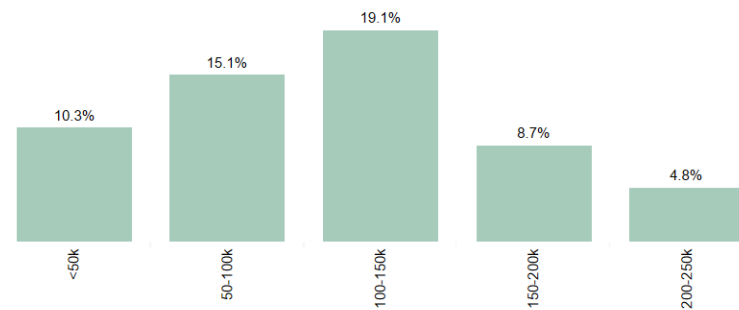
Source: Transunion

Visitor Credit Card Spending by Demographic

Age



Household Income



Powered by **SYMPHONY** | TOURISM ECONOMICS

TransUnion credit card data includes all major credit card spending in destination. Only purchases made with a physical credit card via swipe, insert or tap are included. This results in lower representation for things booked ahead of time out of destination and/or online, like lodging.

Q3 FY 24/25 – PROJECT HIGHLIGHTS



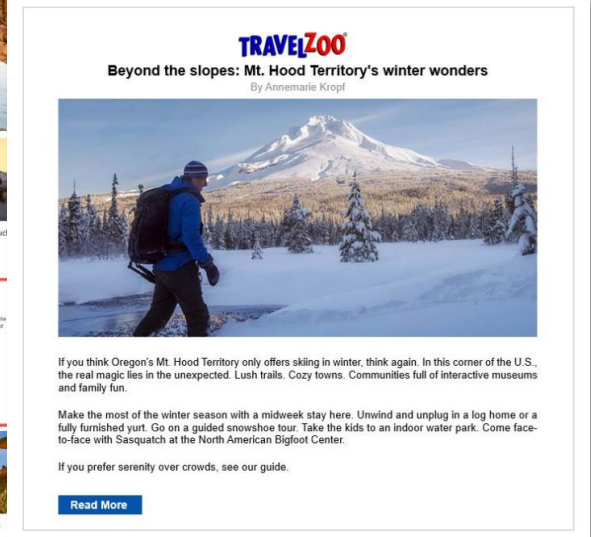
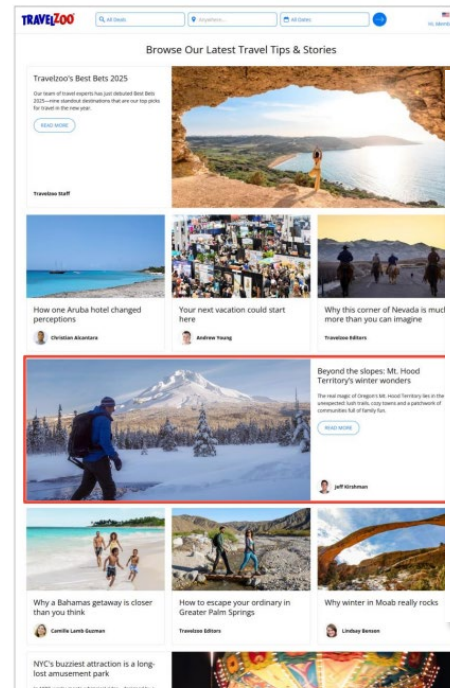
Maximizing Portland Region's Sub-Region Funds

Our Winter Awareness Campaign with Travelzoo (December 1, 2024 – March 31, 2025) advanced our thriving economy strategic priority while stretching every dollar. Funded by Portland Region dollars distributed to sub-regions and amplified with fiscally efficient Clackamas County Tourism advertising funds, the campaign told the full Mt. Hood Territory winter story from peak to valley floor.

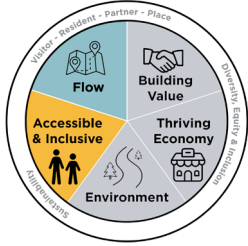
The effort generated 3.77 million impressions (26% above the guarantee) and **24,394 engagements** across the destination gallery and on social media. Users spent **531 cumulative hours** with the content – 31 hours over the target – and averaged nearly two minutes per session. Social engagements surpassed the 1,600 benchmark by 500%, demonstrating the content's appeal.

Crucially, Travelzoo enabled us to highlight our numerous tourism partners and businesses offering winter fun – including guided snow excursions, indoor activities, cozy lodging, vibrant downtowns and Cellar Season wine events – thereby broadening consideration beyond ski resorts. Heat mapping identified dining, indoor activities, and family fun as the most popular interests.

Portland, Los Angeles, Seattle-Tacoma, San Francisco Bay Area and Phoenix converted best, confirming demand from both drive- and fly-markets.



Q3 FY 24/25– PROJECT HIGHLIGHTS



Leveraging Willamette Valley Region Relationships

The Willamette Valley Visitors Association (WVVA) played a key role in helping Clackamas County Tourism further its strategic priorities around visitor flow and an accessible and inclusive environment by amplifying our nuanced messaging around the iconic Wooden Shoe Tulip Festival.

Each spring, visitors come from all over to witness the colorful tulip fields, but many don't realize how much more there is to explore nearby, including attractions, outdoor adventures and family friendly spots. WVVA helped amplify tips to potential visitors about experiencing local businesses and communities around Wooden Shoe Farm by sharing our messaging through its March consumer newsletter and blog, reaching a broad, engaged audience already interested in Oregon's unique spring travel experiences.

WVVA also helped highlight the EnChroma colorblind glasses collaboration we did with the Wooden Shoe Tulip Farm at the festival. These special glasses allowed colorblind visitors to see the full vibrancy of the tulips — many for the first time. Promoting this offering showed the region's commitment to accessible travel and created a shareable experience that resonated with a broader audience than we could have reached.

WVVA NEWSLETTER STATS:

- 39.84% open rate (6,002 opens)
- 4.1% CTR; 50% of clicks (124) went to Wooden Shoe



The Latest News From the Willamette Valley

Hello from the Willamette Valley! We hope you're enjoying the early days of spring so far!



Tulip Festival Blooms Near Woodburn

The [Wooden Shoe Tulip Festival](#)—one of the Willamette Valley's most cherished traditions—is open through April 27 near Woodburn.

The festival includes 40 acres of colorful tulips alongside local food vendors, a variety of children's activities, carnival rides, a tulip market, and more. Farm tours, floral workshops, and other fun activities are available, as well.

Starting this year, attendees with red-green color blindness can borrow [specialized EnChroma outdoor color blind glasses](#)—free of charge. The glasses filter light and adjust color wavelengths to help attendees see colors more accurately.

Friendly tip: [Festival tickets](#) are only available online and in advance. If possible, plan a midweek visit to enjoy a bit more solitude. After your visit, make time for other [fun adventures around Woodburn](#)—like meeting alpacas and tasting local wines.

Q3 FY 24/25 – METRIC HIGHLIGHTS

PRIORITY MESSAGES

Q3 aligned with Mt. Hood Territory's winter peak, so our messaging balanced destination stewardship with economic growth. We spotlighted small businesses through Cellar Season, indoor family fun, Mt. Hood base camp communities and winter lodging highlights. Audience insights also guided us to keep evergreen drivers such as the travel planner and newsletter front and center.

Message Highlights:

- Winter lodging
- Midweek deals
- Otter Dos/Take Care Out There
- Why Guides
- Indoor family activities
- Cellar Season
- Mt. Hood homepage
- Travel planner & consumer newsletter



1,048,154,955

Impressions



4,425,969

Engagements



37,313

Partner Conversions

DATAFY MARKETING ATTRIBUTION

Datafy captures behaviors of visitors who were served our ads then traveled to the destination.



15,504

Room Nights



\$22,728,179.10

Visitor Spend



\$516.96 : \$1

ROAS

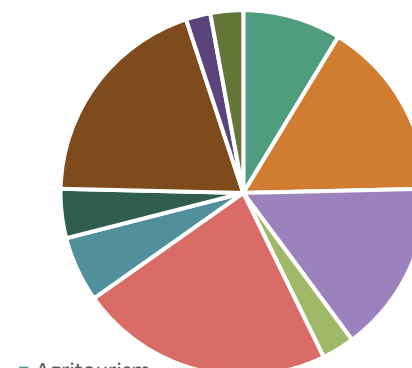
(Return on Ad Spend)

OPTIMIZATIONS & LEARNINGS

Previously, Datafy used extrapolation, which estimates total reach beyond device counts for its advertising attribution reports. Datafy's recent shift to a more conservative model based on individual devices provides a more accurate, verifiable minimum reach. The attribution and ROAS appear lower this quarter, partly because the reach calculation now uses this more conservative count. This change ensures that our results are measured against a more rigorous and transparent baseline.

PARTNER ENGAGEMENT

Q3 outreach included a relatively high ratio of outdoor recreation partners as we prepared for spring/summer messaging.



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

138

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

Oregon's Mt. Hood Territory Clackamas County Tourism



TOURISM DEVELOPMENT COUNCIL

Luke Spencer

Chair

Clackamas River
Outfitters
Estacada

Holly Pfortmiller

Vice Chair

Best Western Plus
Rivershore
Oregon City

Amy Barton

Clackamas River Basin
Council
Clackamas

Katen Patel

K10 Hotels, Milwaukie
Inn
Milwaukie

Brian Crow

Clackamas County Fair
& Event Center
Canby

Mike Quinn

Mt. Hood Skibowl Winter
& Summer Resort
Government Camp

Patrick Dawsey

Residence Inn Lake
Oswego
Lake Oswego

Ryan Tignor

iTrip
Clackamas County

Tessa Koch

TMK Creamery &
Distillery
Canby

Lizzie Keenan – 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 24/25 STRATEGIC OUTCOMES



Build local tourism value through relevant tourism resources and awareness.

Enhance authentic experiences so businesses, communities and the economy thrive.

Encourage behaviors and practices that benefit the natural environment.

Improve the awareness and experience of Mt. Hood Territory as an inclusive and accessible destination.

Drive visitation that aligns with the specific needs of a place including regional and seasonal needs.