

Q4 FY 24/25 QUARTERLY REPORT

This quarterly report presents industry trends and highlights some of Clackamas County's Office of Tourism's key projects during Q4 of FY 24/25, April - June 2025.

During Q4 of FY 24/25 due to a drop in lodging demand, county-wide TRT collections saw primarily negative year-over-year comparisons. The I-205 region was the only one to post YOY TRT losses every month of Q4. Both the Online Travel Sales (OTS) and Mt. Hood region displayed YOY growth in all three months, though county-wide figures were driven down by the underperformance in the I-5 and rural regions. Despite YOY declines two out of the three months in Q4 FY 24/25, TRT collections finish the fiscal year up 1.8% YTD when compared to FY 23/24.

The STR report shows that hotel performance in Q4 FY 24/25 was underwhelming compared to the previous year. All KPIs displayed YOY declines except for Average Daily Rate (ADR) which grew 1.4% YOY. Revenues in the quarter were down 4.4% YOY, primarily driven by a 5.9% demand loss over the same period. This was slightly offset by a supply decline of 4.1% YOY, which saw occupancy only dip 1.8% YOY. Supply declines helped offset demand loss, enabling RevPAR to remain flat, declining only 0.4% YOY.

Statewide, the Mt. Hood/Gorge Region took over as region leader in occupancy and ADR from the Portland Region in Q4, surpassing Clackamas County occupancy and ADR rates as the market entered the summer travel season. The Mt. Hood/Gorge Region was the only statewide region to experience revenue, demand, occupancy or RevPAR growth in Q4. The Portland Region saw Key Performance Indicators (KPI) declines across the board, as Clackamas County saw YOY declines in everything but growth rate.

U.S. hotel performance softened in July, with occupancy down 1.0% and RevPAR off 1.1% YOY, while ADR was flat. Year-to-date, ADR is up 1.1% and RevPAR 0.4%. Luxury outperformed with rate and demand gains, while Economy and Independents posted the steepest declines.

The Bureau of Labor Statistics (BLS) revised their May and June job reports down by a combined 258K jobs, slightly raising the unemployment rate to 4.2% after gaining only 73K jobs in July. U.S. 12-month inflation was 2.7%. Consumer prices were up 1% from the start of the year, but 24.7% more than five years ago.



Hotel Occ Tax
\$1.5M
 -1.3% QOY
 (As of Q4 2025)



Visitor Spending
\$210.5M
 -2.9% QOY



Hotel Demand
148.9K
 -5.9% QOY



Hotel ADR
\$138.05
 +1.4% QOY

Q4 FY 24/25– RESEARCH & DATA: TRT Collections

TRT By Region

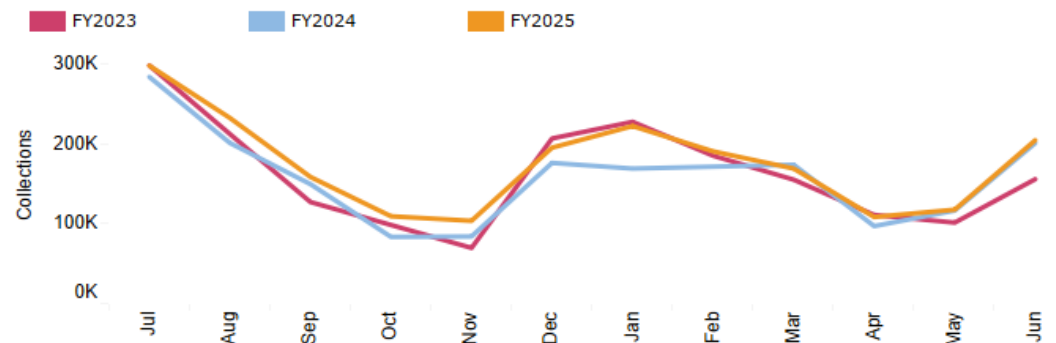
	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
I-5	\$192.6K	\$207.2K	\$155.5K	\$143.8K	\$112.6K	\$112.7K	\$104.5K	\$104.3K	\$118.6K	\$137.9K	\$144.5K	\$189.7K
I-205	\$178.3K	\$161.8K	\$166.2K	\$129.5K	\$104.4K	\$101.8K	\$92.5K	\$98.2K	\$121.5K	\$117.8K	\$127.3K	\$156.6K
Mt. Hood	\$298.4K	\$232.8K	\$158.8K	\$109.4K	\$103.7K	\$195.5K	\$222.6K	\$190.9K	\$169.3K	\$108.5K	\$117.7K	\$204.9K
OTC	\$64.0K	\$60.5K	\$42.5K	\$38.4K	\$33.0K	\$38.2K	\$30.8K	\$33.7K	\$37.7K	\$36.9K	\$43.3K	\$59.1K
Rural	\$20.6K	\$17.5K	\$16.5K	\$6.5K	\$4.8K	\$6.0K	\$4.7K	\$8.8K	\$6.6K	\$6.7K	\$13.3K	\$12.4K
Total	\$753.9K	\$679.8K	\$539.5K	\$427.6K	\$358.5K	\$454.2K	\$455.1K	\$435.9K	\$453.7K	\$407.8K	\$446.1K	\$622.6K

% 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%	-5.1%	+4.5%	-2.6%
I-205	-4.8%	+3.0%	-2.7%	+22.6%	-19.5%	-5.9%	-18.0%	-12.7%	+0.9%	-6.2%	-5.9%	-9.2%
Mt. Hood	+5.0%	+15.6%	+6.0%	+31.0%	+23.3%	+10.8%	+31.5%	+11.2%	-2.7%	+11.8%	+1.0%	+1.8%
OTC	+3.9%	+9.5%	-3.7%	-1.0%	-1.3%	+3.9%	-9.5%	-6.0%	-3.3%	+1.8%	+5.9%	+3.6%
Rural	+32.8%	-5.3%	-3.8%	+15.1%	-31.0%	-3.7%	-23.2%	-5.1%	-30.6%	-25.0%	+10.9%	-12.9%
Total	+3.0%	+11.1%	-1.4%	+13.1%	-3.6%	+5.6%	+2.7%	-3.6%	-2.4%	-1.3%	+0.7%	-2.7%

TRT Earnings by Month

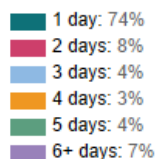
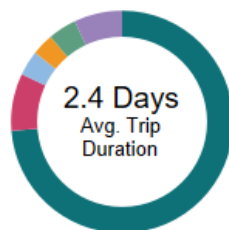
Last Four Fiscal Years



Source: Oregon's Mt Hood Territory

Q4 FY 24/25– RESEARCH & DATA: Trips and Occupancy

Average Trip Duration

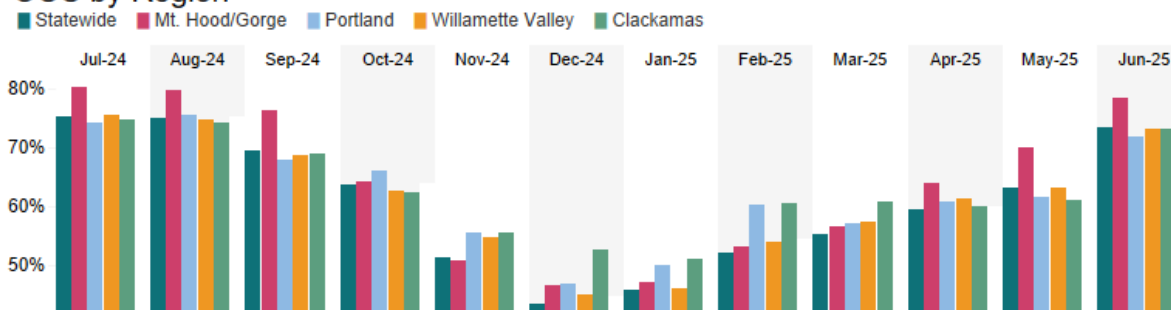


 Vs. **2.4**
QOQ Q3 24/25

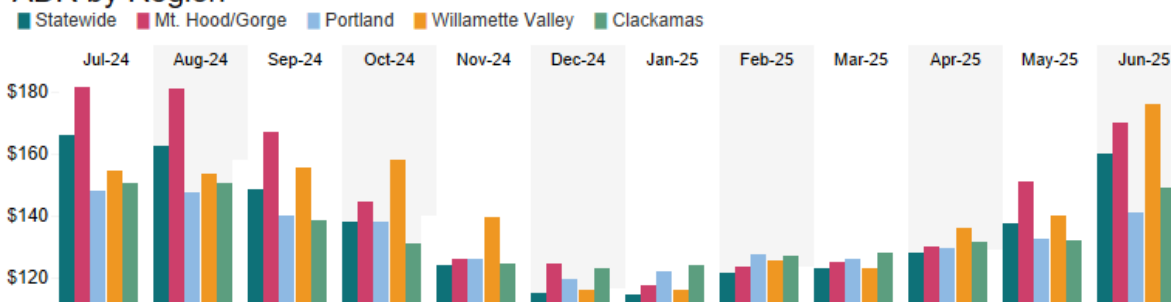
 Vs. **2.2**
YOY Q3 23/24

Source: Datafy

OCC by Region



ADR by Region



Source: STR

Q4 FY 24/25– RESEARCH & DATA: Hotel Review

Clackamas FY Q4 2025 Performance

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

Occupancy	ADR	RevPAR	Supply	Demand	Revenue
64.7%	\$138	\$89	230.0K	148.9K	\$20.6M
-1.8%	+1.4%	-0.4%	-4.1%	-5.9%	-4.6%

Performance by Month

	OCC	YOY%	ADR	YOY%	RevPAR	YOY%	
Apr	Clackamas	60.2%	-2.3%	\$131	+1.2%	\$79	-1.2%
May	Clackamas	61.1%	-0.3%	\$132	+1.1%	\$81	+0.8%
Jun	Clackamas	73.1%	-2.7%	\$149	+1.9%	\$109	-0.8%

Fiscal Year-to-Date Performance

Clackamas

Occupancy	ADR	RevPAR	Supply	Demand	Revenue
63.0%	\$135	\$85	934.7K	589.2K	\$79.8M
+0.3%	+1.0%	+1.3%	-2.9%	-2.6%	-1.6%



Q4 FY 24/25- RESEARCH & DATA: Hotel Competitive Perf.

Clackamas FY Q4 2025 Performance

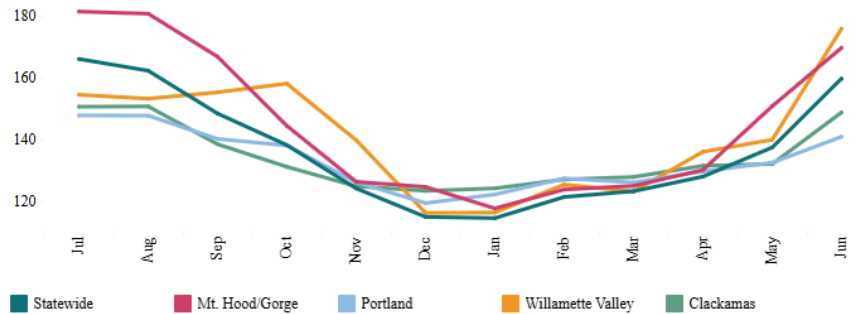
		OCC	YOY%	ADR	YOY%
Apr	Clackamas	60.2%	-2.3%	\$131	+1.2%
	Mt Hood Gorge	64.0%	+0.1%	\$130	-0.3%
	Portland	60.9%	-2.4%	\$130	-5.8%
	Statewide	59.6%	+0.1%	\$128	-3.2%
	Willamette Valley	61.2%	-0.4%	\$136	+0.2%
May	Clackamas	61.1%	-0.3%	\$132	+1.1%
	Mt Hood Gorge	69.9%	+1.0%	\$151	+2.8%
	Portland	61.6%	+1.1%	\$132	-1.3%
	Statewide	63.2%	+2.5%	\$137	-0.6%
	Willamette Valley	63.1%	-1.0%	\$140	-0.9%
Jun	Clackamas	73.1%	-2.7%	\$149	+1.9%
	Mt Hood Gorge	78.4%	+2.5%	\$170	-1.8%
	Portland	71.7%	-4.5%	\$141	-4.3%
	Statewide	73.4%	-0.3%	\$160	-2.6%
	Willamette Valley	73.0%	-4.7%	\$176	-9.4%

ADR by Market

Fiscal Year-to-Date

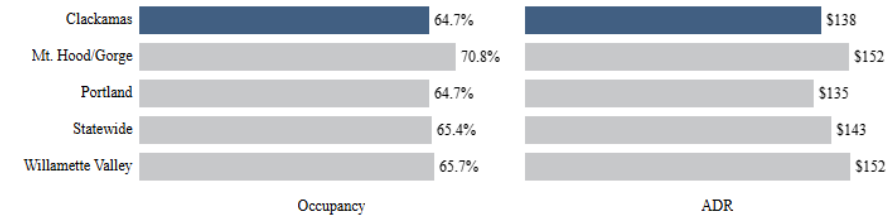
Measure

ADR

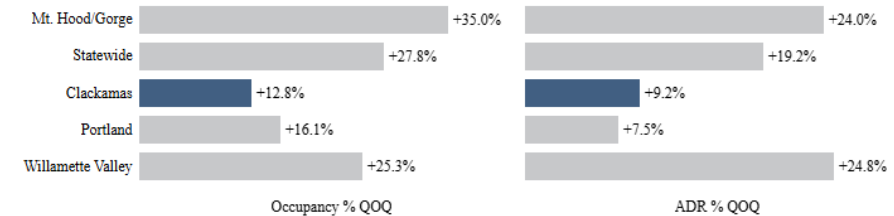


Quarter-to-Date Performance

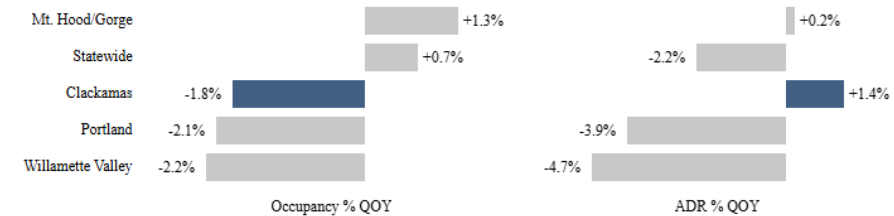
Performance by Market



% Change vs. Previous Quarter



% Change vs. Previous Year



Q4 FY 24/25– RESEARCH & DATA: Visitor Trends

April

Cluster Visitation

Cluster	Visitor Days
Clackamas County Communities	817,997
Parks & Recreation Land	188,850
Main Streets	183,475
Other Top Sites	131,011
Agritourism	75,135
Lodging	73,113
Wineries	34,633
Rivers & Lakes	16,450
Trails	12,805
Visual and Performing Arts	8,005
Breweries Cideries Distilleries	6,392
Heritage Sites	4,481

May

Cluster Visitation

Cluster	Visitor Days
Clackamas County Communities	965,448
Parks & Recreation Land	223,548
Main Streets	187,226
Other Top Sites	166,910
Lodging	100,479
Agritourism	25,970
Rivers & Lakes	19,520
Wineries	18,506
Trails	16,894
Breweries Cideries Distilleries	8,872
Visual and Performing Arts	7,607
Heritage Sites	7,600

June

Cluster Visitation

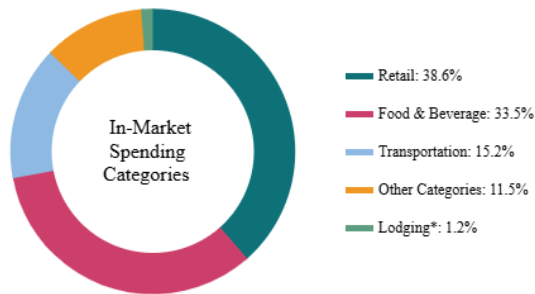
Cluster	Visitor Days
Clackamas County Communities	1,192,247
Parks & Recreation Land	431,105
Other Top Sites	319,763
Main Streets	306,672
Lodging	195,163
Trails	55,991
Rivers & Lakes	30,622
Agritourism	19,597
Wineries	19,113
Visual and Performing Arts	17,996
Breweries Cideries Distilleries	16,785
Heritage Sites	13,261

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

Q4 FY 24/25– RESEARCH & DATA: Visitor Spending

Visitor Credit Card Spending

Card Spend
\$210.5M
-2.9% QOY



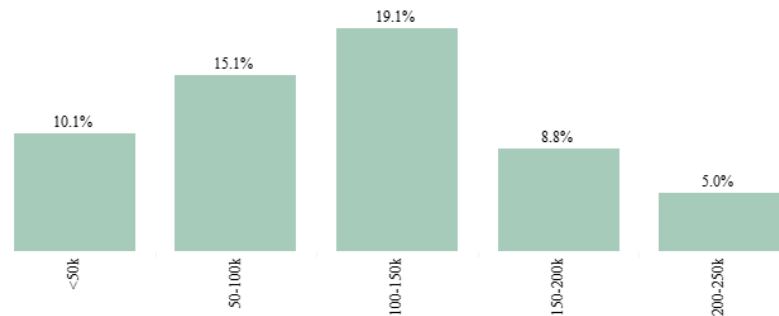
*Lodging spend represents in-market spend only.

Visitor Credit Card Spending by Demographic

Age



Household Income



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.

Q4 FY 24/25– PROJECT HIGHLIGHTS



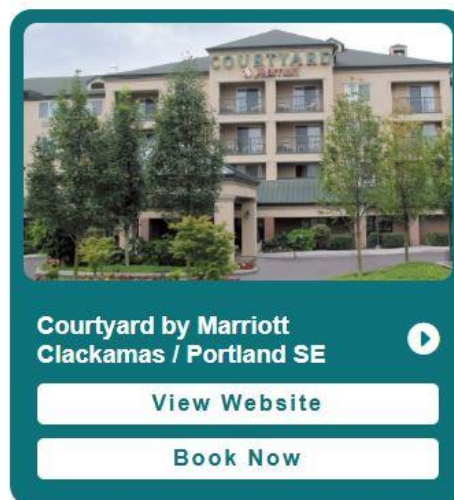
A LODGING-FIRST APPROACH

Clackamas County's Office of Tourism has expanded its content strategy by partnering with guest writers to create lodging-focused articles highlighting lodging properties across the county. Written in a first-person style, these stories offer readers an authentic glimpse into what it's like to experience each accommodation. By spotlighting details that set properties apart — whether a riverside view or resort-level amenities — the articles inspire travelers to choose their stay first and then explore the activities nearby. We've also developed authentic, high-quality vertical video of on-property experiences for use in our own social media campaigns and advertising by partnering with Crowdriff content creators. This "stay-first" approach shows how lodging is more than just a place to rest; it's the foundation of a memorable trip.

"When I checked into my room at Mt. Hood Oregon Resort, I almost didn't leave. I collapsed into a plush bed outfitted with memory foam bedding, snuggled up with a book on the couch and threw a log on the corner fireplace (available in select rooms) to round out the cozy vibes." – *Guest Writer Matt Wastradowski*

Alongside storytelling, we've enhanced the Places to Stay page to improve functionality, simplify navigation and ultimately better serve visitors and partners. Each hotel listing now features a prominent "Book Now" button linking directly to the property's Book Direct platform, making reservations simple. We've also added direct website links for every lodging property so travelers can easily find more details. Combined with our guest-driven content, these updates strengthen the way we connect visitors with exceptional lodging experiences in Mt. Hood Territory. Q4 represents the first full quarter where the cumulative effects of all improvements have been realized.

Places to Stay Page FY 24/25 YOY Performance



Q4 FY 24/25– PROJECT HIGHLIGHTS



NEW ACCESSIBLE TRAVEL SECTION ON WEBSITE

Last year's TravelAbility Conference inspired our team to rethink how we share content about accessible travel experiences in Clackamas County. Instead of simply listing accessible locations, we wanted a way to convey authenticity and heart. We invited guest writers with different abilities to share their lived experiences in our destination. Their perspectives give readers a genuine sense of what it's like to explore the county, blending accessibility with adventure. The response from these writers has been overwhelmingly positive, and their unique ideas and stories have transformed our content into a resource that is both meaningful and practical for visitors with many different abilities.

ACCESSIBLE TRAVEL

Oregon's Mt. Hood Territory is an unforgettable experience, and accessible travel options ensure that everyone can enjoy our breathtaking scenery, outdoor adventures and charming communities. Travel with guides who offer accessible options or visit lower-mobility friendly trails throughout the area. There are also many options and ways to experience inclusive events and destinations for those with invisible disabilities as well. Walk quietly through forest trails or book a private tour of an historic home and tour at your own pace. Whether you're visiting one of the boardwalks or enjoying a quiet farm visit, Mt. Hood Territory offers a variety of welcoming experiences.

Looking for great trip ideas? Check out the articles below to help inspire your next adventure.

Trip Ideas



Wilsonville Hearts

Photographer-storyteller duo Downs & Towns capture the vibrant spirit of Wilsonville's new...

[Read More](#)



Farm Fresh Fun: A Day At Frog Pond Farm

Discover the charm of Frog Pond Farm in Oregon's Mt. Hood Territory....

[Read More](#)



End Of The Oregon Trail Interpretive Center Offers Accessible Look Into Oregon's History

Visit the End of the Oregon Trail Interpretive Center in Oregon City....

[Read More](#)



Oregon's Biggest Mystery: Finding Sasquatch

Oregon's North American Bigfoot Museum is a must-visit location, where exhibits, folk...

[Read More](#)



Rainbow Campground: An Advanced Wheelchair Camping Experience In Oregon's Wilderness

Find out about this rugged, wheelchair camping adventure location along the Clackamas...

[Read More](#)



Graham Oaks Nature Park: A Wheelchair-Accessible Park Experience In Oregon

Visit this accessible, family-friendly destination with scenic trails, wildlife and peaceful oak...

[Read More](#)

Today, this work lives on an accessible travel landing page under the "Plan Your Trip" section of our website. What began as a simple idea has become a growing hub of resources, set for a complete revamp soon as we continue to expand the stories we share. And we're not stopping there. We're already planning more guest articles, reflecting our ongoing commitment to making Mt. Hood Territory welcoming for all.



<https://www.mthoodterritory.com/accessible-travel>

Q4 FY 24/25– PROJECT HIGHLIGHTS



PARTNER TRAININGS

In Q4, Experience Mt. Hood and the Gorge, the Mt. Hood and Columbia River Gorge Regional Destination Management Organization (RDMO), focused on partner engagement. The Region hosted a series of trainings in partnership with Mt. Hood Territory and Travel Oregon.



PARTICIPATING REGIONAL PARTNERS:

21 (East Loop FAM)

22 (West Loop FAM)

10 (Tourism 101)

Frontline Worker Familiarization (FAM) Tours:

This two-part training followed the East and West sides of the Infinity Loop Map, the main visitor resource for Experience Mt. Hood and the Gorge. Participants included visitor center workers, hotel front desk staff, and other partners that interface regularly with visitors. The tours gave participants first-hand experience of sites on Mt. Hood and in the Gorge that have capacity for visitors and let participants experiences some of our alternative transportation options in the region. The FAM tours replicated a similar model to that of Clackamas County's Office of Tourism Frontline FAMs. This type of training helps improve visitor interactions, enhances the accuracy of information available including responsible travel messaging, and optimizes visitor flow to sites that have capacity during the busy summer season.

Tourism 101 Training:

Experience Mt. Hood and the Gorge hosted a Tourism 101 session on Mt. Hood, to help inform tourism-related businesses of the opportunities available through the RDMO and DMO partners. We debuted our new online toolkit of business support tools and had guest presentations from Travel Oregon as well as the Tourism Office's contracted social media agency, Fish Marketing, for additional skills training.

Q4 FY 24/25– PROJECT HIGHLIGHTS



INTERNATIONAL TRAVEL TRADE SHOWS

Q4 for international sales and promotion centered around IPW, the largest travel trade show in the USA, put on by Brand USA, the tourism marketing arm of the United States. Our team attended as a delegate with the Portland Region booth, representing all of Clackamas County at over **40 meetings spanning 3 days**. In addition, we provided a scholarship to Lori Cabantoy, sales manager from Mt. Hood Oregon Resort, to join us at the show. They have since signed two new contracts with tour operators, which will add to the hundreds of room nights the hotel has already booked with other operators through our support with travel trade leads, increasing visitation to our area.

Examples of some of our best leads from IPW include:

- G2 Travel, North American Division
- Club Tourism International (Japan)
- Rendezvous Roadtrips (UK)
- Travelhome (Netherlands)
- Tourmart (South Korea)
- Globus (USA)
- Harmke Kraak (Netherlands)
- Itine-Rari (Italy)

Follow up with the above leads included shared itineraries, information, as well as e-introductions with over 20 hotel, activity, farm, winery, outdoor recreation and guided outfitter partners.



Q4 FY 24/25– METRIC HIGHLIGHTS

PRIORITY MESSAGES

Q4 aligned with our off-peak spring season, leading into the peak summer months. Messaging emphasized strategic visitor flow management around the popular Wooden Shoe Tulip Festival and highlighted multi-day events and holidays — from the Upper Clackamas Whitewater Festival to Memorial Day Wine Tasting to the Lake Oswego Art Festival — to drive visitation and support a thriving economy. Content also underscored responsible travel, with a focus on wildfire prevention.

Message Highlights:

- Spring lodging getaways
- Whitewater rafting/Why Guides
- Things to do around Wooden Shoe
- Flower farms
- Art festivals
- Spring events
- Wineries
- Responsible travel/wildfire preparedness



932,584,557

Impressions



4,169,722

Engagements



43,324

Partner Conversions

DATAFY MARKETING ATTRIBUTION

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



13,365

Room Nights



\$24,771,087

Visitor Spend



\$656.33 : \$1

ROAS

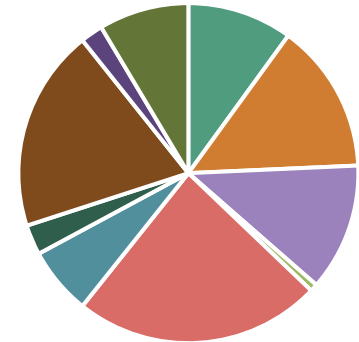
(Return on Ad Spend)

OPTIMIZATIONS & LEARNINGS

Instagram posts and profiles now appear in Google search results. By optimizing content for search, tourism businesses can ensure they are visible when potential visitors are actively searching. We're advising partners to treat Instagram profiles as a searchable resource by prioritizing clear, descriptive keywords and alt-text in post captions, business and location descriptions in bios, hashtags that reflect genuine search behavior and location tagging.

PARTNER ENGAGEMENT

Q4 has a relatively large engagement with "other" category, mostly due to event sponsorships for a variety of organizations.



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

140

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

Oregon's Mt. Hood Territory Clackamas County's Office of 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's Office of 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.