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Industry Report

EXECUTIVE SUMMARY

Travel Medford reports a 2.4% increase year-over-year in the first quarter (July-Sept.) in Transient Lodging Tax (TLT) collected. The \$562k of Travel Medford's share of TLT revenue was a record QI, up 2.2% from the previous QI record set in 2021. The total TLT amount from August and September were the second-most for those respective months. Additionally, the TLT revenue from intermediaries was a record high for QI by 8%. July was an all-time high in TLT for intermediaries.

TRANSIENT LODGING TAX: Actual vs. Prediction (2025-26)

		Hotels	Intermediaries	Total TLT	Projection	Difference
	JUL	\$ 137,168	\$ 39,608	\$ 176,776	\$ 182,334	(\$ 5,558)
Q1	AUG	\$ 171,037	\$ 37,664	\$ 208,701	\$ 199,081	\$ 9,620
	SEP	\$ 140,226	\$ 36,774	\$ 177,000	\$ 169,159	\$ 7,841
	ОСТ					
Q2	NOV					
	DEC					
	JAN					
Q3	FEB					
	MAR					
	APR					
Q4	MAY					
	JUN					
	TOTAL	\$ 448,431	\$ 114,046	\$ 562,477	\$ 550,575	\$ 11,902

+2.2%
Q1 TLT TO
PROJECTION

+2.4%

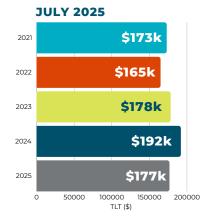
Q1 TLT COMPARED TO Q1 FY 24-25

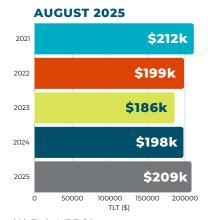
The City of Medford imposes an 11% Transient Lodging Tax (TLT) on overnight stays in hotels, motels and intermediaries (RV Parks, short term rentals and campgrounds) within the city limits. The figures shown in the table are Travel Medford's 25% share of the net TLT.

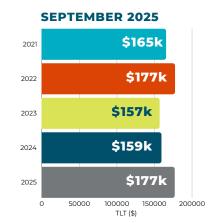
TLT CHART: Fiscal Year 2025-26



TLT BY MONTH: Quarter 1







NOTE: Lodging includes hotels & intermediaries (AirBnb, VRBO)

Industry Report

INDUSTRY METRIC TABLE

QI	Med	ford	Jackson	County	Oregon		
2025-26	Quarter	% Chg YOY	Quarter	% Chg YOY	Quarter	% Chg YOY	
Occupancy Rate	75.8%	3%	75.6%	3%	71.9%	-2%	
Average Daily Rate	\$134.06	4%	\$144.96	3%	\$197.37	4%	
RevPar	\$101.61	6%	\$109.60	6%	\$141.82	2%	

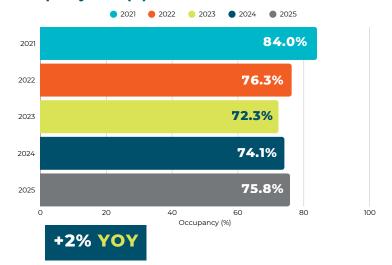
Occupancy Rate: Percentage of Rooms booked (Room Demand / Room Supply)
Average Daily Rate: Avg. of booked nights (ADR = Revenue / Room Demand)
RevPar = Revenue Available Per Room (ADR x Occupancy Rate)
Room Demand: Booked Room Nights during reporting period
Room Supply: Number of Room Nights available during reporting period

YEAR-TO-DATE JULY 2025	Medford		Jackson	County	Oregon		
To SEPT 2025	Quarter	% Chg YOY	Quarter	%Chg YOY	Quarter	% Chg YOY	
Occupancy Rate	75.8%	3%	75.6%	3%	71.9%	-2%	
ADR	\$134.06	4%	\$144.96	3%	\$197.37	4%	
RevPar	\$101.61	6%	\$109.60	6%	\$141.82	2%	
Room Demand	202,812	3%	440,014	4%	6.1 M	-1%	
Room Supply	267,587	1%	581,931	1%	8.5 M	1%	
Room Revenue	\$27.2 M	7%	\$63.8 M	7%	\$1.21 B	4%	

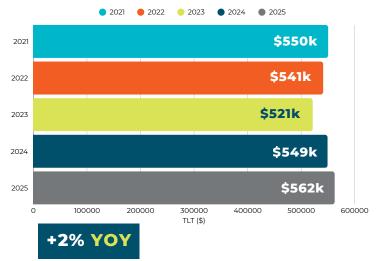
Sources: STR & AirDNA Hotels & Intermediaries

QUARTERLY TOURISM TRENDS: Quarter 1 (July-Sept)

Occupancy Rate (%)



TLT - Total Revenue

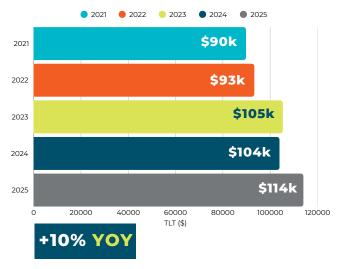


NOTE: TLT is Travel Medford's share (25% of net TLT receipts)

Average Daily Rate (ADR)



TLT - Intermediaries



Medford Market Visitation: Q1 July-Sept



TOURISM PROMOTION SUMMARY

Travel Medford subscribes to Datafy, LLC, a location tracking software that provides information about visitor behavior to use for strategic planning and marketing purposes. To register as a data point in the platform, a person must originate from more than 50 miles away from Medford and visit at least one point of interest as pre-determined by Travel Medford staff.

490,393 Total Trips

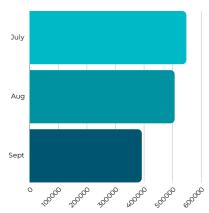


1,362,052 Visitor Days

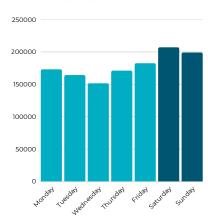


2.8 Avg. Length of Stay

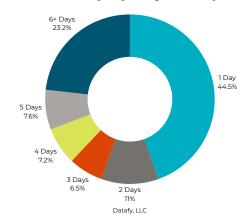
Visitors Per Month



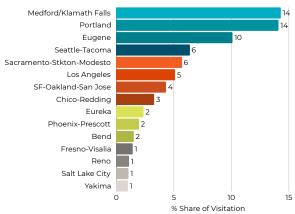
Visitors by Day



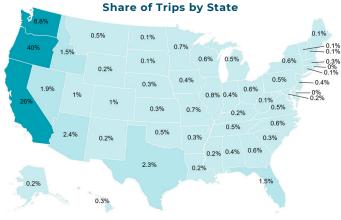
Visitor Days by Length of Stay



Designated Market Area (DMA) Visitation

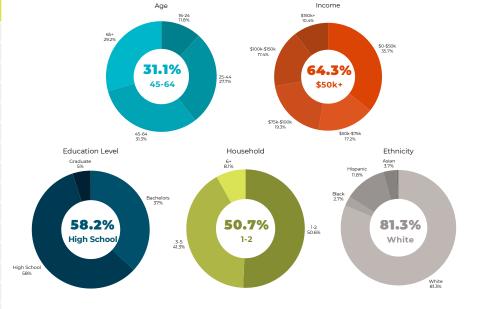






DMA	Avg. Length of Stay	Share of Visitor Days
Phoenix-Prescott	3.1 Days	2.0%
Portland	3.0 Days	14.1%
Spokane	2.9 Days	1.0%
Seattle-Tacoma	2.9 Days	6.4%
Salt Lake City	2.9 Days	1.1%
Los Angeles	2.9 Days	5.1%
Reno	2.8 Days	1.1%
San Diego	2.8 Days	1.0%
SF-Oakland-San Jose	2.8 Days	4.3%
Eugene	2.7 Days	10.1%
Fresno-Visalia	2.7 Days	1.4%
Sacramento-Stkton-Modesto	2.7 Days	5.7%
Bend	2.6 Days	1.5%
Eureka	2.4 Days	2.4%
Chico-Redding	2.4 Days	3.3%

Visitor Demographics



Tourism Promotion



TOURISM PROMOTION SUMMARY

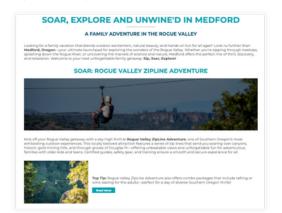
Our marketing and communications efforts demonstrated strong performance across social media, website engagement, press relations, and advertising. Social channels saw steady growth in both audience size and engagement, driven by consistent content output and targeted campaign support. Paid partnerships with social media influencers, and UGC contributors continue to grow our reach and engagement. Website traffic increased, with improvements in session duration reflecting relevant content updates. Additionally, advertising initiatives delivered solid results, optimizing spend while increasing reach and supporting lead-generation goals. Press relations activity generated meaningful visibility that secured high-quality media placements. We hosted the Travel and Words Conference in September that brought over 30 media to Medford. The conference was bookended by FAM trips that hosted 10 media for an indepth look at the Rogue Valley.

WEBSITE & SOCIAL MEDIA

ACTIVE USERS: 90K

TOP PAGES

SOAR. EXPLORE & UN'WINE: 26K OFFICIAL GUIDE TO MEDFORD: 21K TOP EVENTS AND FESTIVALS: 21K





Followers: 19.3K Increase: +423 **Reach: 60.7K**

Top content by views



Just spent a weekend in Medford, Oregon...

Fri Sep 12, 9:04am

 303K 334

♥ 2.9K



Sip. Savor. Stay awhile. The Rogue Valley is...

→ 184

Sun Aug 3, 9:00am • 11K 338

11



Followers: 37.5K Increase: +527 Reach: 770K

Top content by views



Welcome Solé Brunch & Lounge in downto...

Wed Aug 27, 1:12pm 89.3K **703** 36



Before summer slips away, we found...

Thu Sep 4, 1:55pm

→ 71.1K ● 1.2K

33 ♣ 55

VISITOR GUIDE DISTRIBUTION

1,985 **DIRECT VISITOR GUIDE REQUESTS**

50 STATES

8 OREGON WELCOME CENTERS 72 LOCAL DISTRIBUTION AREAS

111 SITES IN NORTHERN CALIFORNIA



NEWSLETTER

MOVED TO 2X PER MONTH IN SEPTEMBER

221 NEW SIGNUPS OPEN RATE: 31.3%

CTR: 4.1%



WHERE WE'RE ADVERTISING



Z EXPEDIO REPORT SNAPSHOT

Direct Booking Campaign (Aug.-Sept.)

\$545,430 **Gross Room Revenue**

\$17.80 to \$1 **Return on Ad Spend (ROAS)**

\$30,593 3,963 **Room Nights Generated Ad Spend**

Tourism Promotion



PRESS RELATIONS SUMMARY

Sunset

Medford was named a "Top Small Town" by the Sunset Travel Awards, resulting in coverage from: KOIN







"Active travel with a glass of wine—we'll drink to that." -Sunset Magazine on Medford









No. 2: Rogue Valley, Oregon

regule valley, Olegon, with a dress, of the microclimates and varying elevation, allows for the cultivation of a wide range of grape varieties. This diversity results in the production of distinct wines, marking the outdoor activities add to the appeal of the

FOOD&WINE

6 American Fruit Capitals to Visit in Season by Julekha Dash

Medford is home to Harry & David, where you can take a factory tour to see how the staff packages the coveted buttery Comice pears. EdenVale Winery makes an organic, estate-grown sparkling pear cider from Seckel pears, which you can enjoy while exploring the historic mansion and gardens. The hard cider, sometimes called "perry," can also be found at Blossom Barn, a solar-powered farm that produces ciders with cherry, apple, and other fruit flavors.





Wine Country Reinvented *By Casey Hatfield-Chiotti*

Rogue Valley: The Chameleon

During its 150-year history, Southern Oregon's Rogue Valley has remained highly experimental, producing a diverse range of wines, from excellent chardonnay to pinot gris, and Italian varietals to Iberian wines. At the Applegate Valley winery Quady North, visitors can try a varied portfolio that includes Rhône varietals and a dash of France's Loire Valley. The full-bodied Steelhead Run Vineyard Viognier has notes of stone fruit but a mineral backbone, while its Cabernet Franc is structured and smoky.

Set in the foothills outside Jacksonville, DANCIN Vineyards transports guests to Europe with its Tuscan architecture and Burgundy-style pinots. Crisp, complex chardonnays shine, and visitors can pair wood-fired pizzas with award-winning Roque Valley Barbera. Just 15 minutes away, wine lovers can try an inky malbec or an acidic yet creamy sauvignon blanc at the 26-acre Padigan estate vineyard.



"Romantic Oregon Wine Country Escapes for Fall" by Jean Chen Smith

DANCIN | MEDFORD

Located in Medford, DANCIN Vineyards is home to Burgundian-style pinot noirs, chardonnays, syrah, zinfandel and port wines. It is the birthplace of the Vinum New World Pinot Noir glass by Riedel, promoting the fruit and acidity. The glass's distinct tulip shape is meant to distribute the aromas harmoniously, while minimizing the depth of the alcohol. The grounds are surrounded by lush trees and gardens, with an outdoor patio. Enjoy an artisan pizza and a glass of wine as you take in the views; the vineyard has an elevation up to 1,800 feet. There is also live music throughout the year. 4477 S. Stage Road, Medford; www.dancin.com



Freelance Writer Portland Monthly, The Daily Beast, Mansion Global, and The New York Post









- Selected from National RFP in Fall of 2024
- 2 Day Conference
- NORTHWEST TRAVEL & LIFESTYLE WRITERS CONFERENCE 50+ Regional Association Representatives



Farm to Table Dinner at Table Rock Vineyards



Welcome Reception at **Edenvale Winery**



Immersive Experiences (fly casting, star gazing, corn hole)



"You will be a tough act to follow. You showed Medford in the best possible light. Both evening events were over the top wonderful and I thank you for your part in making Travel & Words a success." -Allen Cox, Chief Editoral Director

Event Promotion



EVENT PROMOTION SUMMARY

The first cycle of funds for the redesigned Community Partnership Grant were awarded during the first quarter. Overall, 26 applications were received for a variety of events across our three pillars. The events that were awarded funds included \$10,000 for events at Rogue X and Lithia and Driveway Fields as well as multiple downtown events. Supported events were a mix of those that drive tourism and those that enhance Medford as a tourism destination.

1,031
EVENTS ON
EVENT CALENDAR

COMMUNITY PARTNERSHIP GRANT FUND (Budget Line 812.6)

#	Event Name	Event Month	Funds Awarded	In-Kind Amount	Total Support	Event Classification(s)					
	2025 EVENTS										
1	Ashland Folk Collective (Fry Family Farm)	Summer	\$1,500		\$1,500	Arts & Culture					
2	Craterian Theater	Aug-June	\$3,500		\$3,500	Arts & Culture					
3	Sasquatch Open Pro Am	Aug	\$1,000		\$1,000	Sports & Recreation					
4	Britt Music & Arts Festival	July-Sept	\$2,500		\$2,500	Arts & Culture					
5	Challenger Invitational Volleyball	Aug	\$2,000		\$2,000	Sports & Recreation					
6	Southern Oregon Golf Championships	Aug	\$1,000		\$1,000	Sports & Recreation					
7	Cascade Girl Oregon Honey & Mead Festival	Sept	\$500		\$500	Food, Wine & Agritourism					
8	Medford Rogue Rotary Pickleball Fest	Sept	\$1,000		\$1,000	Sports & Recreation					
9	Dia de Los Muertos	Nov	\$1,500		\$1,500	Arts & Culture					
		2026 E	VENTS								
10	Travel Southern Oregon Travel Jam	Feb	\$3,500		\$1,500	Food, Wine & Agritourism					
11	CEVA Rogue Valley Classic	Mar	\$2,500		\$2,500	Sports & Recreation					
12	Southern Oregon Speedway	Apr-Sept	\$5,000		\$5,000	Sports & Recreation					
13	Southern Oregon Open	May	\$3,500		\$3,500	Sports & Recreation					
14	Southern Oregon Classic & Culinary Feast	June	\$3,200	\$1,800	\$5,000	Sports & Recreation					
15	Savor Southern Oregon	June	\$2,905		\$2,905	Food, Wine & Agritourism					
	TOTAL		\$35,105	\$1,800	\$36,905						

ROGUE X EVENTS (Budget Line 812.62)

#	Event Name	Event Month	Funds Awarded	In-Kind Amount	Total Support	Event Classification(s)
1	ACO Medford Major - Fall	Oct 2025	\$3,500		\$3,500	Sports & Outdoors
2	ACO Medford Major - Winter	Jan 2026	\$3,500		\$3,500	Sports & Outdoors
3	49 th Annual Medford Rod & Custom Show	April 2026	\$3,000		\$3,000	Sports & Outdoors
	TOTAL		\$10,000	\$0	\$10,000	

Event Promotion (cont.)



DOWNTOWN EVENTS (Budget Line 812.62)

#	Event Name	Event Month	Funds Awarded	In-Kind Amount	Total Support	Event Classification(s)
1	32nd Great Medford Multicultural Fair	Sept 2025	\$2,500		\$2,500	Downtown
2	Forks & Friends (Downtown Restaurant Week)	Oct 2025	\$5,000		\$5,000	Downtown
3	The Rogue Marathon	Oct 2025	\$1,500	\$5,000	\$6,500	Downtown
4	Ride For A Cause	Oct 2025	\$0	\$1,500	\$1,500	Downtown
5	Winter Lights Festival	Dec 2025	\$2,500		\$2,500	Downtown
6	Rogue Comic Con	May 2026	\$2,500		\$2,500	Downtown
	TOTAL	\$14,000	\$0	\$20,500		

LITHIA & DRIVEWAY FIELDS EVENTS (Budget Line 826)

#	Event Name	Event Month	Funds Awarded	In-Kind Amount	Total Support	Event Classification(s)
1	USA Softball Fall Showcase	Oct 2025	\$5,000		\$10,000	Sports & Outdoors
2	Cascade Collegiate Conference Soccer Championships	Nov 2025	\$5,000		\$10,000	Sports & Outdoors
	TOTAL		\$10,000	\$0	\$10,000	

TOTAL EVENT PROMOTION (Budget Line 812.61)

Event Classification	# of Events	Funds Awarded	In-Kind Amount	Total Support
Arts & Culture	4	\$9,000	\$0	\$9,000
Downtown	6	\$13,500	\$6,500	\$20,000
Food, Wine & Agritourism	3	\$6,905	\$0	\$6,905
Sports & Recreation	13	\$39,200	\$1,800	\$41,000
TOTAL	26	\$68,605	\$8,300	\$76,905

Visitor Services



VISITOR SERVICES SUMMARY

The "Taste of the Rogue" campaign at the Medford Airport continues to be popular for local wineries and we've seen an uptick in encounters. Travel Medford launched the Rogue Valley Digital Wine Guide in September, which now features all wine tasting rooms along with an interactive map to guide visitors through wine country. Sign ups have been strong. Travel Medford hosted a dinner at DANCIN for a group of Danish Receptive Tour Operators who were on a statewide tour with Travel Oregon; the group was very impressed with the beautify and serenity of the Rogue Valley.

ROGUE VALLEY AIRPORT INFORMATION DESK DATA

	Volunteer/ Staff Hours	Phone Calls	Visitor Inquiries	Aiport Inquiries	Explore Board	Hootboard Interactions	Total Interactions	Arriving Flights	Passenger Capacity
JUL	155	17	626	349	2,387	1,549	4,928	274	22,550
AUG	106	22	372	267	2,521	1,488	4,670	201	18,374
SEP	126	16	479	312	2,346	881	4,034	263	23,212
ОСТ	128	21	326	265	2,225	1,741	4,578	265	21,095
NOV									
DEC									
JAN									
FEB									
MAR									
APR									
MAY									
JUN									
TOTAL	387	55	1,477	928	7,254	3,918	13,632	738	64,136
TOTAL YTD 24-25	540	95	1,306	1,122	7,805	3,708	14,036	658	61,122
% Chg	-28%	-42%	13%	-17%	-7%	6%	-3%	12%	5%

*Arriving Flights = when VIC was staffed

OTHER VISITOR SERVICES & PROGRAMS

	Visit	ors	Taste of	the Rogue	Passp	oorts	Total	OVE	RALL
	Downtown	Rogue X	Flights	Encounters	Sign Ups	Check-ins	Interactions	INTERACTIONS	
JUL	155	1,242	14	234	16	35	1,682	JUL	6,610
AUG	106	1,042	14	112	15	17	1,292	AUG	5,962
SEP	85	733	13	107	52	8	985	SEP	5,019
ОСТ	82	879	20	172	325	48	1,506	ОСТ	6,084
NOV								NOV	
DEC								DEC	
JAN								JAN	
FEB								FEB	
MAR								MAR	
APR								APR	
MAY								MAY	
JUN								JUN	
TOTAL	346	3,017	41	453	83	60	3,959	TOTAL	17,591
TOTAL YTD 24-25	243	4,446	28	273	89	18	5,069	TOTAL YTD 24-25	19,105
% Chg	42%	-32%	46%	99%	-7 %	233%	-22%	% Chg	-8%

*Note: Started tracking at Rogue X in January 2024

Destination Development (Sports)



SPORTS TOURISM SUMMARY

The first quarter allowed multiple opportunities to promote current and future events in Medford while also beginning to highlight the outdoor adventures our region offers. A busy summer offered opportunity to promote and support a wide range of events while plans began for upcoming events in Fall and Spring/Summer of 2026. And work continued on the Sports Strategic Plan as we strategize on how to achieve the sports tourism goals for Medford and Southern Oregon.

Q1 KEY DATES/EVENTS

Aug. 25 - Sept. 1 - Southern Oregon Golf Championships

Aug. 30 - Challenger Invitational

Sept. 27- Hyrox Crossfit Competition

Sports Tourism Promotion:

- Attended the American Cornhole Organization (ACO) World Championships in Tulsa, OK and an the ACO Tahoe Major to promote the ACO World Championships in Medford in 2027
- Multiple segments on the Ace Sports Radio discussing upcoming events and key elements of the growth in sports tourism
- Distributed Mt. Bike Trails Map to local bike shops, chambers of commerce, visitors centers, and hotels in Southern Oregon
- Continued conversations with United Soccer League about potential expansion teams in Medford

Event Support:

 Provided support for the Sasquatch Open, the Southern Oregon Golf Championships, Challenger Invitational, Medford Rotary Pickleball Fest, and The Den's Hyrox Crossfit Competition

Sports Tourism Strategic Plan:

- Hosted a special meeting for a Southern Oregon Sports Commission deep dive on strategic plan report
- Created a "one-sheet" to showcase the overall findings and directions of the strategic plan
- Released document to stakeholders with request for feedback
- Began work on short-term, medium-term, and long-term goals associated with the plan

Looking Forward:

- American Legion Baseball Regionals committee was formed and began meeting for the regional events in August of 2026 & 2027
- Established year-long partnership with Southern Oregon Cornhole to promote regional events, ACO Majors, and ACO World Championships in 2027
- Hosted meetings to begin planning for the return of the Oregon Youth Soccer Association's President's Cup

HIGHLIGHTS

11

RFPs Reviewed

8

Event Directors Contacted

12

Sports Events
Attended

9.6K

SOSC Social Reach

41.3K

SOSC Social Views

245

Sports Outreach (Meetings, emails, calls)

54%

Newsletter Open Rate



Left: Darren and T.J. promoting Medford at the ACO Lake Tahoe Major in California.

Right: Darren and Joe Brett promoting sports tourism and Southern Oregon Sports Commission on the ACE Sports Radio

