

Q1 report

2025-2026 | JULY, AUGUST, SEPTEMBER



IRONMAN 70.3 OREGON

THE MOST OREGON
PART OF OREGON



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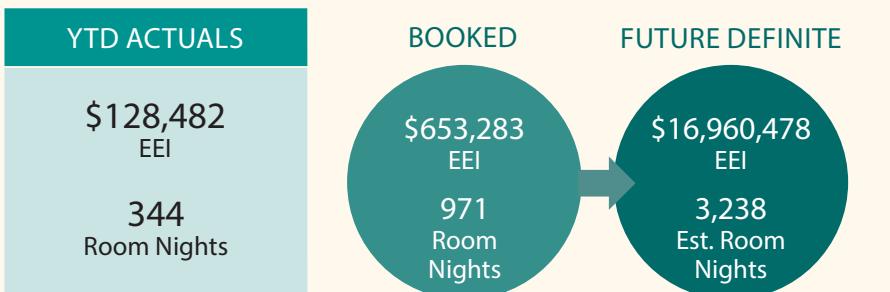
Q1 executive summary

Transient Occupancy Tax (TOT) revenues decreased 5.6% YOY for the first quarter, driven by a 1.8% decrease in hotel ADR and a 3% decrease in occupancy. Oregon is seeing hotel revenue decreases due to the economic downturn. Online visits increased YOY 42% due to Google ads on additional channels and social media reach increased 46% YOY due to increased focus on paid content.

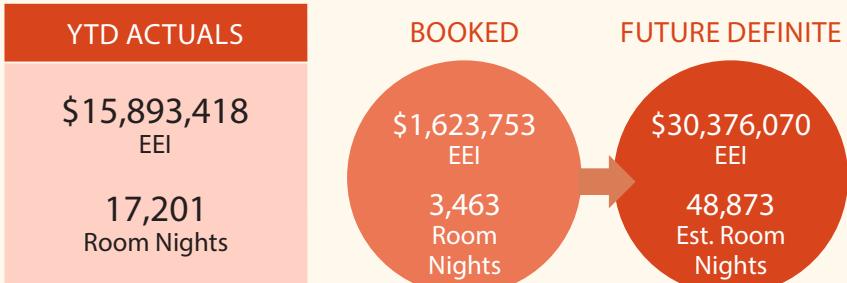
MARKETING



SALES CONVENTIONS

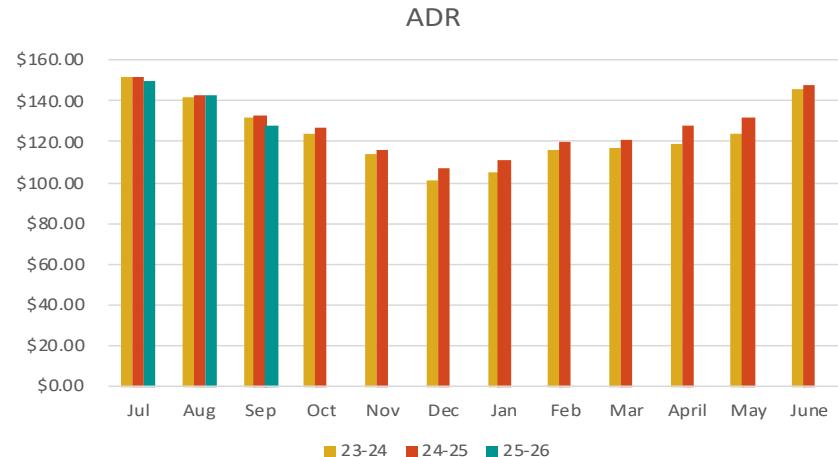


SPORTS



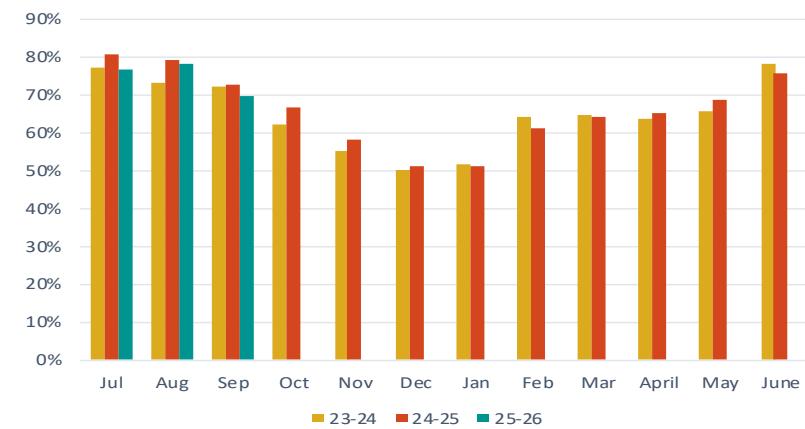
AVERAGE DAILY RATE (STR)

2025-26 HOTEL ADR -1.8%



OCCUPANCY (STR)

2025-26 HOTEL OCCUPANCY -2.96%

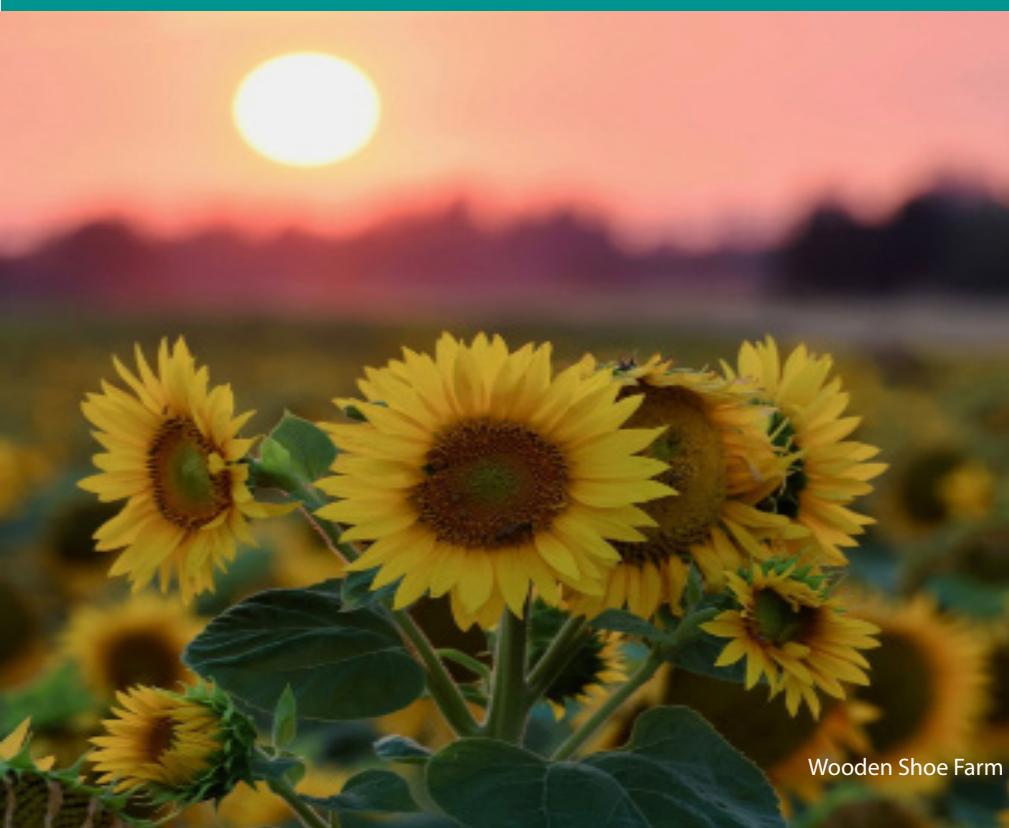


*Sports & Convention stats may vary quarter to quarter based on timing of available data and/or event cancellations.

key performance measurements

Key performance measurements are tracked to provide a picture of the overall economic health of the Salem & Mid-Willamette Valley tourism industry. When evaluating progress, these nine selected indicators should be considered alongside other measurements such as financial resources, program staff and advertising support. Environmental influences and other economic trends are also considered to gain better insight into the health of the industry.

Specific tourism-based activities also provide context for evaluating the bigger picture and can reveal trends and key market factors that influence how the organization makes adjustments in program initiatives. Travel Salem is not the sole contributor or driver to the region's tourism-based economic outcomes. However, the organization takes a leadership role in economic development and tourism promotion to help shape industry results.



Wooden Shoe Farm

PERFORMANCE MEASUREMENT*	25-26 ACTUAL	% GOAL	25-26 ANNUAL GOAL	24-25 ACTUAL
1 Estimated Economic Impact	\$	%	↑2% = \$809,166,000	\$793,300,000
2 Salem Transient Occupancy Tax (TOT)**	\$1,519,748	27%	↑5% = \$5,563,931	\$5,298,982
3 Leverage	\$762,844	26%	\$2,900,000	\$2,859,290
4 Consumer Engagement	28,445,372	14%	↑15% = 201,394,658	175,125,790
5 Visitor Information Network Attendance	22,494	26%	↑6% = 85,071	80,256
6 Earned Media Impressions	14,916,618	10%	↑5% = 148,871,415	141,782,300
7 Social Media Reach***	2,298,226	20%	↑12% = 11,346,838	10,131,106
8 Online Visits****	128,521	28%	↑10% = 452,386	411,260
9 Convention & Sports Actual Room Nights	17,545	56%	↑10% = 31,520	28,655

* Targets are based on normal market conditions and don't take into consideration significant impacts such as pandemic, recession, depression, natural disasters, fuel anomalies, etc..

** Outcomes influenced by fluctuations in ADR, occupancy. Currently, data only available through Aug.

*** Methodologies may change year to year as vendors update their algorithms; year-over-year changes may not be comparable

KPM: a closer look

YEAR-OVER-YEAR COMPARISON & HIGHLIGHTS

24-25 ACTUALS

25-26 YTD ACTUALS

25-26 ANNUAL GOAL

1 ESTIMATED ECONOMIC IMPACT

25-26 GOAL: \$809,166,000

\$793,300,000

TBD

The 2025 Estimated Economic Impact, for the two-county region, will be available May 2026.

3 LEVERAGE

25-26 GOAL: \$2,900,000

\$269,698

\$762,844

Q1 leverage for 25-26 is at 26% of our goal and 180% over FY 24-25 actuals. The YOY increase is attributed to the timing of recognizing WVVA's budget as leverage, which occurred in Q2 of 24-25.

2 SALEM TRANSIENT OCCUPANCY TAX (TOT)

25-26 GOAL: \$5,563,931

\$1,611,173

\$1,519,748

TOT is below average for the quarter by 5.6%. This trend is being seen across the state of Oregon. The downturn in the economy is the major driver of this decrease.

4 CONSUMER ENGAGEMENT

25-26 GOAL: 201,394,658

24,035,351

28,445,372

Overall consumer engagement increased 18% YOY due to increased social media reach.



Paddle Boarding on Willamette River

24-25 ACTUALS

25-26 YTD ACTUALS

25-26 ANNUAL GOAL

5 VISITOR INFORMATION NETWORK

25-26 GOAL: 85,071

21,063

22,494

Visitor Information Network attendance increased 7% YOY due to the installation of visitor information signage on I-5.

8 ONLINE VISITS

25-26 GOAL: 452,386

90,527

128,521

Online visits increase of 42% over previous year due to expansion of Google ads strategy, which now includes video assets on additional channels (i.e., YouTube) driving more visits to our site, events, historic sites and garden hopping.

6 EARNED MEDIA IMPRESSIONS

25-26 GOAL: 148,871,415

19,325,000

14,916,618

The 23% decrease YOY is due to the timing of publication for several stories that are slated to run in Q2 or Q3.

9 CONVENTION & SPORTS ROOM NIGHTS

25-26 GOAL: 31,520

16,698

17,545

Actualized room night production increased 5% YOY due to increased IRONMAN participants and spectators.

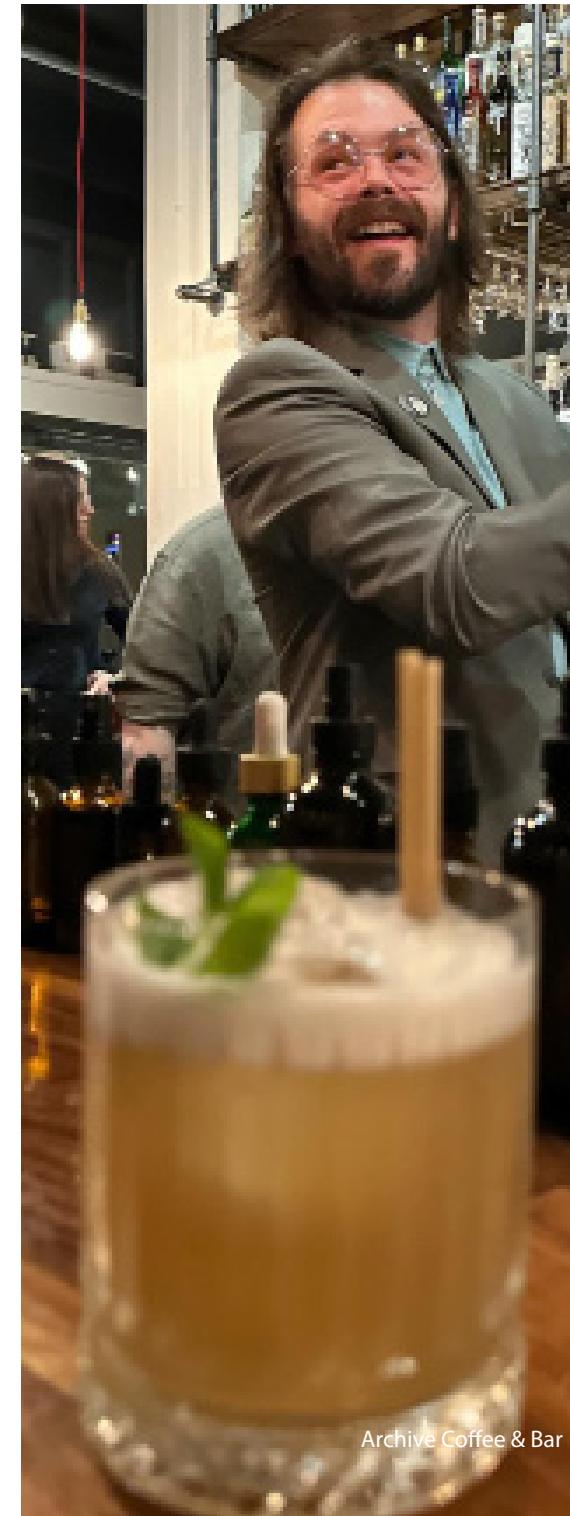
7 SOCIAL MEDIA REACH

25-26 GOAL: 11,346,838

1,569,539

2,298,226

The 46% increase is due to more video content running across all channels and increased focus on both organic and paid content on TikTok.



core areas of focus

Strategic Imperative: INCREASE VISITOR-RELATED ECONOMIC IMPACT

EXTERNALLY FOCUSED

DESTINATION MARKETING

Blaze the Most Oregon Part of Oregon brand and promote the region as a premier destination to create demand for group and leisure travelers and connect visitors with the people and the place.

DESTINATION MANAGEMENT

Enhance destination appeal & create transformative experiences utilizing deep industry expertise, partnerships, advocacy, sustainable tourism initiatives & strategic product development.

INTERNALLY FOCUSED

ORGANIZATIONAL OPTIMIZATION

Develop long-term stable funding, strategic staffing levels & the technology & tools to support a robust Destination Marketing & Management Organization.

OBJECTIVE

MEASUREMENT

1. Implement dynamic communications & industry relations programs to enhance the perception of the region with consumers & residents
 - - Annual visitor & resident sentiment surveys
 - Social media sentiment
 - Media engagement & impressions
 - In-person visitor comment
 - Speakers bureau impact
2. Implement strategic sales & marketing initiatives to drive more group & sports business
 - - Sales pipeline reports
 - ROI (Estimated Economic impact calculator)
 - Post trade show reports
 - Post group surveys
3. Refresh Travel Salem brand to celebrate the unique character of the region
 - Survey brand resonance with visitors, residents & stakeholder
4. Drive shoulder season visitation (Nov-Mar)
 - Advertising calendar, geo-tracking, hotel data, Avelo passengers & sales pipeline report
5. Highlight regional EDI experiences to meet all consumer needs
 - Apply an EDI lens to all strategies & initiatives
6. Identify & engage with strong & emerging consumer target audiences (e.g., Latinx, Hispanic, generational travelers) to increase reach & visitation
 - Partner with Mid-Willamette Valley leaders & organizations (e.g., Hispanic Business Alliance, AARP, Center 50+); increased visitation from target audiences

OBJECTIVE

MEASUREMENT

1. Develop & implement a sports master plan to maximize destination potential
 - Annual venue capacity, quality & footprint of existing events, new business recruitment, improvements to venue inventory
2. Engage with partners to retain & recruit commercial air service
 - Grow existing service & secure new service
3. Research & identify regional EDI experiences to broaden demographic reach & improve destination accessibility
 - Increase EDI assets & experiences
4. Advocate on behalf of the industry to promote key priorities that enhance livability & destination experience
 - Annual visitor & resident sentiment surveys
5. Unite Mid-Willamette Valley partners through shared vision, advocacy & collaboration
 - Implement a unified messaging strategy with economic development partners

OBJECTIVE

MEASUREMENT

1. Leverage complex & dynamic funding streams to maximize economic impact
 - Maintain diversified revenue streams
2. Adapt human resources to meet industry demands
 - Ensure adequate resources through a mix of in-house staffing & contractors
3. Hone communication & strategic collaboration across program areas to efficiently & seamlessly execute initiatives
 - Utilize streamlined & effective communication systems
4. Utilize technology to streamline productivity & spur innovation
 - Adopt new technology as needed
5. Ensure detailed reporting, research & stakeholder communication to educate, engage & empower the industry
 - Deliver meaningful, user-friendly reports & industry communications

CORE AREAS OF FOCUS:

Q1 highlights

Below are initiatives from the year that demonstrate progress in Core Areas of Focus from the 2025-30 Strategic Plan

funding sources key



DESTINATION MARKETING

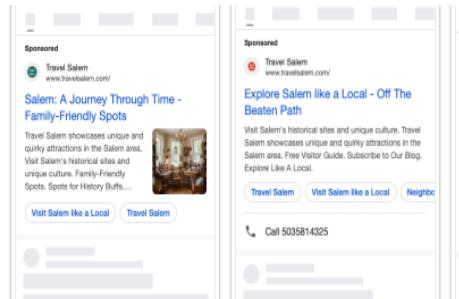
Blaze the Most Oregon Part of Oregon brand and promote the region as a premier destination to create demand for group and leisure travelers and connect visitors with the people and the place.

GOOGLE SEARCH ADS [DM 1]



Travel Salem launched a "Always On" Google ad campaign that focused on search themes such as: Travel, Blog, Places to Stay, Events, Wineries, Salem, Road Trips, Oregon, Willamette Valley, Hotels, Plan your trip to Oregon, Sports, Meetings, Visitor Guide, Cycling, Road Biking Trails, Unusual & Quirky Spots in the Salem Area and Fall Harvest Festivals.

Resulting in 2,553,566 impressions and 53,669 clicks to TravelSalem.com.



STREAMING BROADCAST COMMERCIALS [DM 1]



Streaming Broadcast commercials were launched in Seattle during September and will run through November 2025. The commercials promote travel to the Mid-Willamette Valley (Marion/Polk/Yamhill Counties) to wine, food and travel enthusiasts. Dallas Texas will be the target market for a February 2026 campaign.

Both Seattle and Dallas are important target markets for the regions wineries and overall tourism.



TRAVELSALEM.COM TRANSPORTATION INFO [DM 1,5]



Updated the transportation page on TravelSalem.com to assist travelers with accessibility and navigating downtown Salem's new parking program. Airport, shuttle, Amtrak, GreyHound, Cherriots transit and a map of local EV charging stations were among the section updates.



Q1 BLOGS [DM 1]



Q1 Blogs featured locations from throughout the Salem and Mid-Willamette Valley region. (6,673 blog subscribers)

- Spots to Swim, Paddle & Cast A Line in the Salem Area
- Unusual Salem-Area Spots for Curious Visitors
- Take a Fall Hike Around the Salem Region



CORE AREAS OF FOCUS:

Q1 highlights

Below are initiatives from the year that demonstrate progress in Core Areas of Focus from the 2025-30 Strategic Plan

DESTINATION MANAGEMENT

Enhance destination appeal & create transformative experiences utilizing deep industry expertise, partnerships, advocacy, sustainable tourism initiatives & strategic product development.

TEAM SALEM [DMGMT 4,5]

tot
FUNDDED

Travel Salem convened a Team Salem meeting comprised of hotel and venue partners to coordinate sales efforts and officially launch the Agility fund promotional campaign. This initiative will support business generation through targeted group incentives ad marketing outreach.

DEVELOPMENT & MANAGEMENT UPDATE [DMGMT 4,5]

blend
FUNDDED

Travel Salem continued development and management collaboration with the following groups:

- Travel Salem Downtown Advisory Committee - Updating the downtown business map & advocacy regarding safety & cleanliness.

- Mid-Willamette Valley Tourism Economic Development Consortium - Hosted the Oregon Film Office to discuss "film tourism" - consumers who visit film locations

- Resilient Headwaters - Grant management related to Santiam Canyon trail development.



funding sources key

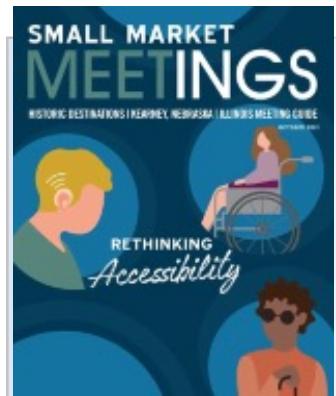


DESTINATION MARKETING [DM]

Q1 highlights

Notable & top-performing public relations articles & social media posts

public relations



SMALL MARKET MEETINGS

"On Site In Salem, Oregon"

Highlighted: Salem Convention Center, Willamette Heritage Center, Oregon State Fair & Expo, The Kroc Center, The Grand Hotel, Holman Hotel, Holiday Inn, Best Western Mill Creek Inn, Independence hotel & Willamette Valley Vineyards.

Ad Value: \$15,000

Circulation: 22,000

lonely planet

LONLEY PLANET

"10 of the Best Things to Do in Oregon"

Highlighted: Breitenbush Hot Springs

Ad Value: \$21,600

Circulation: 5,900,000



KATU TV

"Tree Climbers Flock to Silver Falls for International Festival"

Ad Value: \$16,000

Circulation 1,231,000



social media

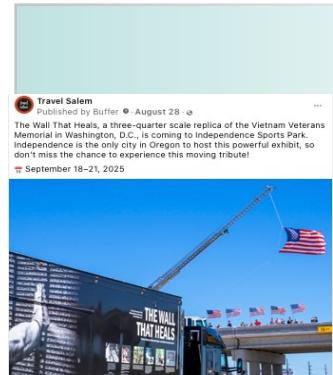


"THE WALL THAT HEALS"

Traveling exhibit: Replica of the Vietnam Veterans Memorial in Washington, D.C. I

Combined Views: 152,381

Engagements: 2,004



DRINKS TO KEEP YOU COOL

Highlighted: Flosa Dirty Soda, Palateria y Neveria la Super 2, Wabi Sabi

Combined Views: 42,795

Engagements: 1,506



BEEHIVE STATION

Combined Views: 78,856
Engagements: 2,145



Salem Art Fair & Festival



Travel Salem is pleased to present the 25-26 First Quarter Report, pursuant to City of Salem Contract Section 1.8. The contract stipulates quarterly reports include a financial report, an overview of activities and performance measurement data, and a clear demonstration of how Transient Occupancy Tax funds and Salem Tourism Promotion Area funds are used on projects, programs, and initiatives, in Salem.

This report fulfills these contractual requirements. All programs and services tie back to Travel Salem's 2025-30 Strategic Plan and the 2025-26 Business Plan, and drive toward the imperative to increase visitor related economic impact through four core areas of focus: destination marketing, destination management and organization optimization.

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