Q4 report

2025-2026 | APR, MAY, JUNE



WORLD BEAT DRAGON BOAT RACE

THE MOST OREGON
PART OF OREGON

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Q4 executive summary

Visitor spending in the Salem region generated $822.1 million in estimated economic impact in 2025, up 3.6% from 2024 and reaching 102% of goal. Social media reach increased 58%, online visits rose 391%, and convention and sports room nights grew 10%. Earned media impressions declined 3% as outreach shifted toward smaller, more qualified travel audiences. Total leverage decreased 4% because 2024-25 included higher earned media value and one-time grant contributions. Salem TOT revenues declined 5%, consistent with lower hotel ADR and occupancy.

MARKETING

YTD

ADVERTISING

15,125,717
Digital Impressions
(Online Ads, Google Ads, Social Media, Blogs, Expedia)

377,068
Print Ad Impressions

25,514
Hotel Room Nights

$3,571,670
Hotel Revenue

PUBLIC RELATIONS

137,501,483
Earned Media Impressions

$745,753
Earned Media Value

SALES

CONVENTIONS

YTD ACTUALS

$3,019,938
EEI

6,100
Room Nights

BOOKED

$18,315,233
EEI

37,049
Room Nights

FUTURE DEFINITE

$17,346,571
EEI

33,469
Est. Room Nights

SPORTS*

YTD ACTUALS

$21,779,177
EEI

25,278
Room Nights

BOOKED

$14,010,280
EEI

25,383**
Room Nights

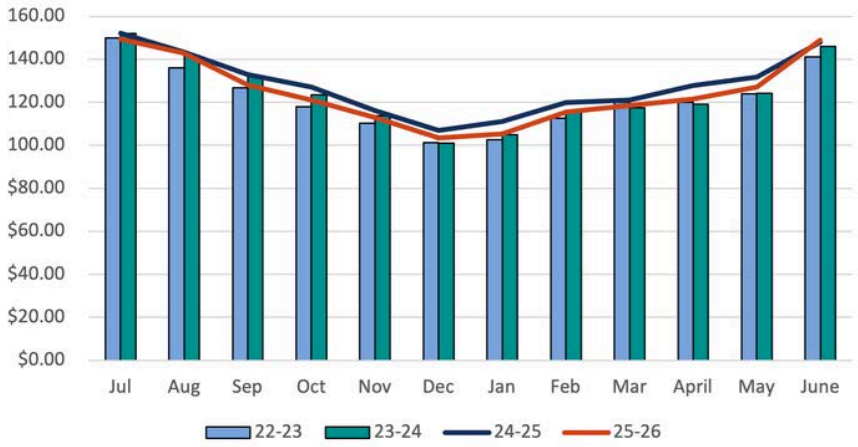
FUTURE DEFINITE

$37,088,010
EEI

39,999
Est. Room Nights

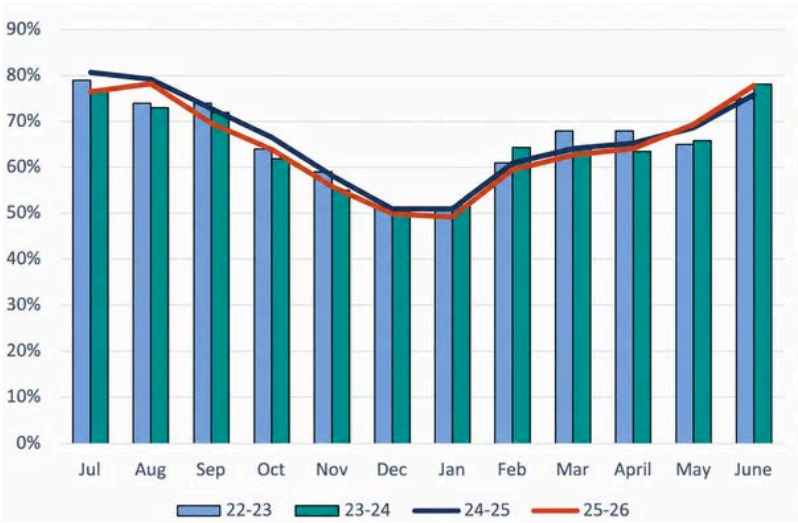
AVERAGE DAILY RATE (STR)

2025-26 HOTEL ADR -2.8%



OCCUPANCY (STR)

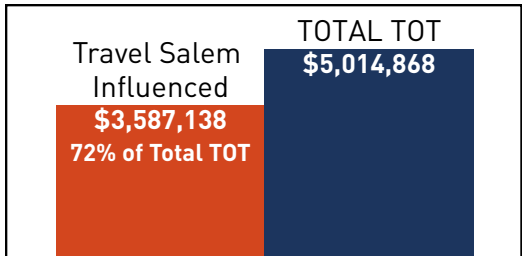
2025-26 HOTEL OCCUPANCY -2.1%



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

** Year-to-date booked room nights are less than 1% higher than actuals, yet Actual EEI is 55.4% higher than Booked EEI. This is largely driven by significantly higher ADR—more than double—during IRONMAN compared to the rest of the year. As a result, even with similar room nights, the elevated IRONMAN rates disproportionately increase the EEI.

SALEM TOT



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.



Brooks Gardens Peonies

PERFORMANCE MEASUREMENT*	25-26 ACTUAL	% GOAL	25-26 ANNUAL GOAL	24-25 ACTUAL
1 Estimated Economic Impact	$822,100,000	102%	↑ 2% = $809,166,000	$793,300,000
2 Salem Transient Occupancy Tax (TOT)**	$5,014,868	90%	↑ 5% = $5,563,931	$5,298,982
3 Leverage	$2,730,986	94%	$2,900,000	$2,859,290
4 Consumer Engagement	198,084,999	98%	↑ 15% = 201,394,658	175,125,790
5 Visitor Information Network Attendance	81,738	96%	↑ 6% = 85,071	80,256
6 Earned Media Impressions	137,501,483	92%	↑ 5% = 148,871,415	141,782,300
7 Social Media Reach***	16,008,423	141%	↑ 12% = 11,346,838	10,131,106
8 Online Visits****	2,021,257	447%	↑ 10% = 452,386	411,260
9 Convention & Sports Actual Room Nights	31,011	98%	↑ 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.

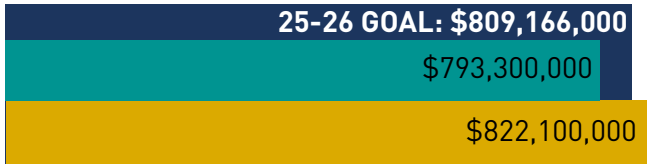
*** Methodologies may change year to year as vendors update their algorithms; year-over-year changes may not be comparable.

KPM: a closer look

YEAR-OVER-YEAR COMPARISON & HIGHLIGHTS

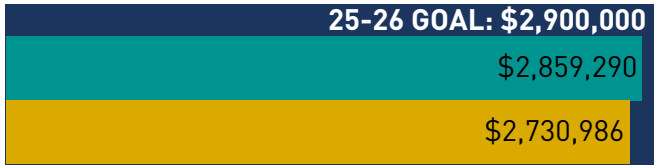
24-25 ACTUALS | 25-26 YTD ACTUALS | 25-26 ANNUAL GOAL

1 ESTIMATED ECONOMIC IMPACT



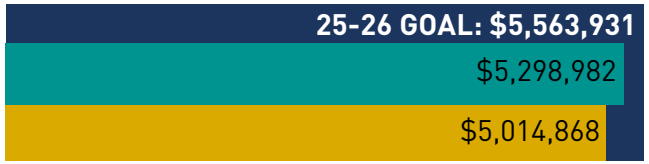
The 2025 Estimated Economic Impact, according to Travel Oregon's "Economic Impact of Travel 2025" report for the two-county region, was $822.1 million (102% of goal).

3 LEVERAGE



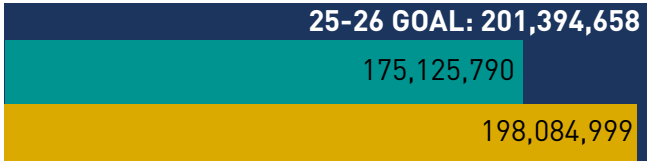
Total leverage decreased 4% YOY because 24-25 included more earned media value and one-time grant contributions. Increased WVVA and Marion Berries partnerships partially offset the decline.

2 SALEM TRANSIENT OCCUPANCY TAX (TOT)



Transient Occupancy Tax revenues decreased 5% YOY, reflecting a 2.8% decline in hotel ADR and a 2.1% decline in occupancy.

4 CONSUMER ENGAGEMENT

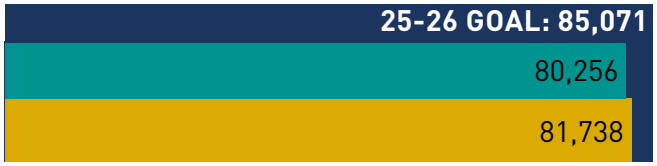


Overall consumer engagement increased 13% YOY and reached 98% of goal. The increase was due to social media and Google advertising.


Jones Farm Produce

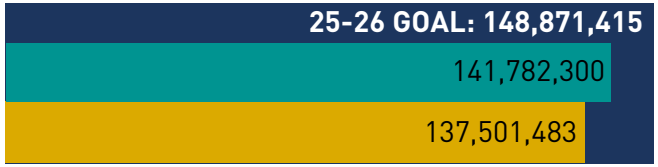
24-25 ACTUALS | 25-26 YTD ACTUALS | 25-26 ANNUAL GOAL

5 VISITOR INFORMATION NETWORK



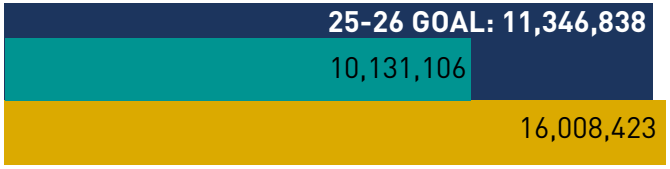
Visitor Information Network attendance increased 2% YOY but fell short of the 85,071 goal after two hotels stopped serving as satellite visitor center locations (due to staff changes and renovations).

6 EARNED MEDIA IMPRESSIONS



Earned media impressions decreased 3% YOY as strategy shifted toward regional and national travel publications with smaller but more qualified travel audiences.

7 SOCIAL MEDIA REACH



Social media reach increased 58% YOY, reaching 141% of the annual goal, driven by more short-form video, increased TikTok ad spend and search-optimized captions.

8 ONLINE VISITS



Online visits increased 391% YOY and reached 447% of the annual goal. This growth was driven by a strategic shift in paid search advertising, including two campaigns targeting evergreen content and seasonal lodging across multiple high-traffic networks simultaneously, including Google Search, YouTube, Gmail and Display.

9 CONVENTION & SPORTS ROOM NIGHTS



Convention and sports room nights increased 8% YOY:

- IRONMAN led all events with 7,500 room nights
- Jim Sherman Memorial NW Championships
- Western Nationals (12, 14, 16 & 18A)
- Capital Cup youth tournaments


The Oregon Garden

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.

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., Latino Business Alliance, AARP, Center 50+); increased visitation from target audiences

DESTINATION MANAGEMENT

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

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

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. 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:

Q4 highlights

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

funding sources key

- **grant FUNDED** — Funded by grants
- **tot FUNDED** — Funded by Transient Occupancy Tax
- **wcp FUNDED** — Funded by Wine Country Plate program
- **stpa FUNDED** — Funded by Salem Tourism Promotion Area
- **wvva FUNDED** — Funded by the Willamette Valley Visitors Association
- **flex FUNDED** — Funded by private revenue sources
- **blend FUNDED** — Item funded by more than one source

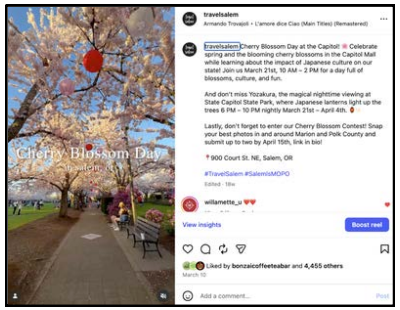
DESTINATION MARKETING [DM]

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.

CHERRY BLOSSOM PHOTO CONTEST [DM 1]

stpa FUNDED

Travel Salem hosted the Cherry Blossom Photo Contest from March 5-April 15, inviting the community to submit their favorite cherry blossom photos from around the region. The campaign generated 532,000+ impressions across Instagram, Facebook and TikTok, driving visibility for the region during peak cherry blossom season. Two winners were selected.

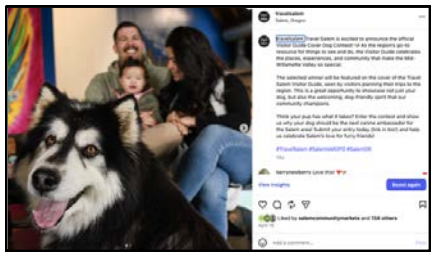


2027 VISITOR GUIDE COVER DOG CONTEST [DM 3]

tot FUNDED

Travel Salem's 2027 Visitor Guide cover dog contest generated 33,000 Facebook and Instagram impressions while engaging the community and building local pride. The winning dog will be unveiled on the 2027 cover.

Special thanks to Kuma for serving as Salem's ambassador for the past five years.



GROUP SALES & SPORTS [DM 2]

stpa FUNDED

- Salem hosted three Jehovah's Witnesses Conventions at the Oregon State Fairgrounds in May, each drawing 1,400 attendees. Combined, these citywide conventions represented an estimated $1.9 million in visitor spending for the community.
- The Oregon Battle of the Books 2026 convention (April 10–12) brought 500 attendees to Chemeketa Community College, generating an estimated $128,714 in economic impact.

OREGON BATTLE OF THE BOOKS ™

GROUP SALES & SPORTS [DM 2]

stpa FUNDED

New business booked and hosted for the quarter included:

- Boys State Volleyball Championship (May 29–30): $316,597 estimated economic impact.
- Pure Focus Sports Small School Showcase (June 5-7): $364,880 estimated economic impact.
- High School National Invitational (June 12–13): $448,285 estimated economic impact.



CORE AREAS OF FOCUS:

Q4 highlights

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DESTINATION MANAGEMENT [DMGMT]

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

GREAT OAKS FOOD TRAIL [DMGMT 3]

grant FUNDED

Updated food trail brochures and maps with participating businesses and attractions. New brochures distributed throughout Travel Oregon's Welcome Centers, expanding the trail's reach to visitors across Oregon.



INTERNSHIP PROGRAM [DMGMT 4]

stpa FUNDED

Five interns supported Salem's cultural institutions this quarter: four placed at the Riverfront Carousel, B-17 Museum, Willamette Heritage Center and Salem Multicultural Institute, and one working alongside Travel Salem on the Experience Salem brochure. Work included digitizing 1,000+ historical photos at the Riverfront Carousel, cataloging WWII artifacts at the B-17 Museum and improving World Beat Festival attendee surveys, helping these institutions preserve and share their history.





ORGANIZATIONAL OPTIMIZATION [OO]

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

2025 SALEM REGION TRAVEL ECONOMIC IMPACT REPORT [OO 5]

tot FUNDED

Travel Salem produced the 2025 Travel Trends report, turning state economic data into a picture of what tourism means for the region. Visitor spending in Marion and Polk Counties generated an estimated $822.1 million in economic impact in 2025, up 3.6% from 2024. Overnight trips rose 1.9% to 2.8 million, and visitors stayed 7.2 million nights in the region. Tourism supported 8,050 jobs (up 1.2%) and $261.4 million in wages (up 5.2%). Visiting friends and relatives accounts for a higher proportion of stays in the market compared to the state: private home stays account for 38% of overnight visitor spending, compared to 25% statewide.



DESTINATION MARKETING [DM]

Q4 highlights

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

funding sources

tot FUNDED

stpa FUNDED

public relations



House Beautiful

HOUSE BEAUTIFUL

"30 Most Beautiful Places in the World to See Cherry Blossom Trees Burst Into Bloom"

Highlighted: Oregon State Capitol State Park

Ad Value: $33,471
Circulation: 3,700,000



Portland Monthly

PORTLAND MONTHLY

"What To Do in Oregon in May"

Highlighted: Schreiner's Gardens, Adelman Peony Gardens

Ad Value: $6,300
Circulation: 625,000



NORTHWEST TRAVEL & LIFE

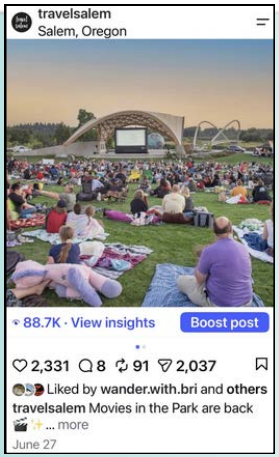
NORTHWEST TRAVEL & LIFE MAGAZINE

"Now in the Northwest: What's Happening in Oregon in June"

Highlighted: World Beat Festival

Ad Value: $5,700
Circulation: 125,000

social media



"MOVIES IN THE PARK ARE BACK"

Highlighted: Gerry Frank Rotary Amphitheater in Riverfront Park

Combined Views: 199,594
Engagements: 5,522



"WORLD BEE DAY"

Highlighted: Flying Bee Ranch

Combined Views: 59,308
Engagements: 1,535



"NEW BRUNCH SPOT"

Highlighted: Clink!

Combined Views: 55,647
Engagements: 1,296


Wooden Shoe Tulip Farm

Travel Salem is pleased to present the 2025-26 Fourth 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 three core areas of focus: destination marketing, destination management and organizational optimization.

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