

Q3 report

2024-2025 | JAN, FEB, MAR

THE MOST OREGON
PART OF OREGON



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Q3 executive summary

Transient Occupancy Tax (TOT) revenues are pacing 10% ahead of last year, through March, being driven by a 2.5% increase in hotel ADR and a 2% increase in occupancy. To date, five months have produced the highest TOT on record.

MARKETING

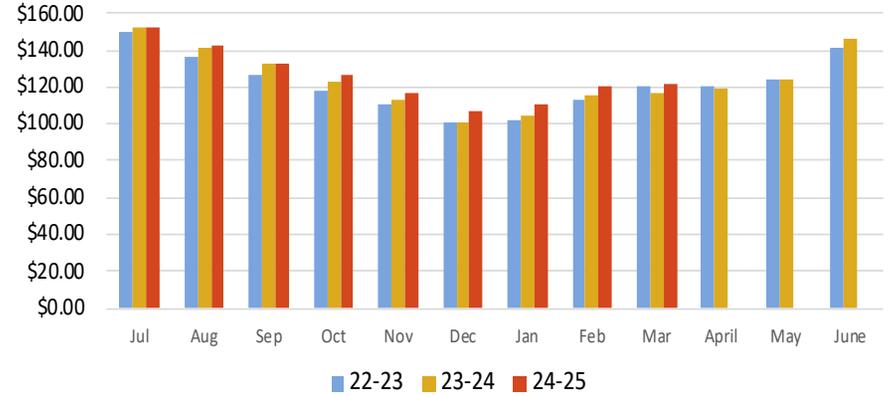
ADVERTISING 5,625,820 Digital Impressions (Online Ads, Google Ads, Social Media, Blogs, Expedia) 187,397 Print Ad Impressions	YTD 16,608 Hotel Room Nights \$2,311,770 Hotel Revenue	PUBLIC RELATIONS 102,267,400 Earned Media Impressions \$799,060 Earned Media Value
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SALES

CONVENTIONS YTD ACTUALS \$377,781 EEI 635 Room Nights	TENTATIVE \$961,980 1,886 Est. Room Nights	FUTURE BOOKINGS \$3,012,912 EEI 4,446 Est. Room Nights
SPORTS YTD ACTUALS \$12,616,617 EEI 21,105 Room Nights	TENTATIVE TBD EEI 8,152 Est. Room Nights	FUTURE BOOKINGS \$56,258,031 EEI 43,844 Est. Room Nights

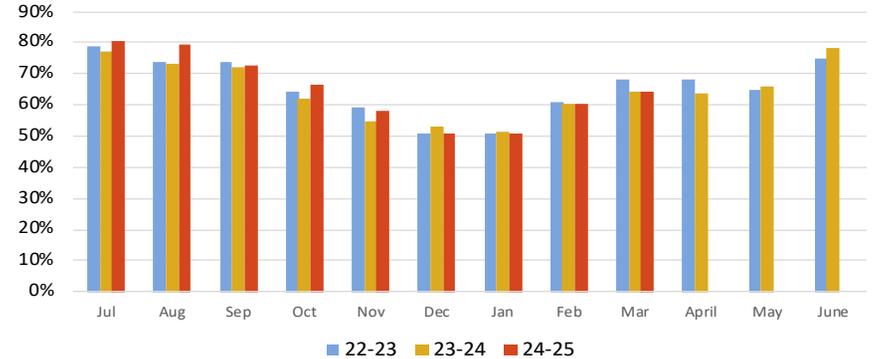
AVERAGE DAILY RATE (STR)

2024 HOTEL ADR IS +2.5%



OCCUPANCY (STR)

2024 HOTEL OCCUPANCY IS +2%



SALEM TOT REVENUES

Travel Salem Influenced
\$2,725,355
 TOTAL
\$3,804,356

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.



The Enchanted Forest

PERFORMANCE MEASUREMENT*	24-25 ACTUAL	% GOAL	24-25 ANNUAL GOAL	23-24 ACTUAL
1 Estimated Economic Impact	\$793,300,000	100%	↑2% = \$796,926,000	\$781,300,000
2 Salem Transient Occupancy Tax (TOT)**	\$3,804,356	75%	↑5% = \$5,084,494	\$4,842,375
3 Leverage	\$1,683,697	73%	\$2,300,000	\$2,809,379
4 Consumer Engagement	124,574,219	63%	↑15% = 197,435,763	171,683,272
5 Visitor Information Network Attendance	59,997	52%	↑6% = 114,203	107,739
6 Earned Media Impressions	102,267,400	79%	↑5% = 128,990,400	122,848,000
7 Social Media Reach***	5,936,538	43%	↑12% = 13,924,456	12,432,550
8 Online Visits****	279,318	93%	↑10% = 301,027	273,661
9 Convention & Sports Actual Room Nights	21,105	58%	↑10% = 36,354	33,049

* 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.

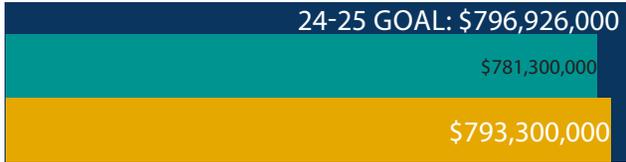
*** Methodologies may change year to year as vendors update their algorithms; year-over-year changes may not be comparable

KPM: a closer look

YEAR-OVER-YEAR COMPARISON & HIGHLIGHTS

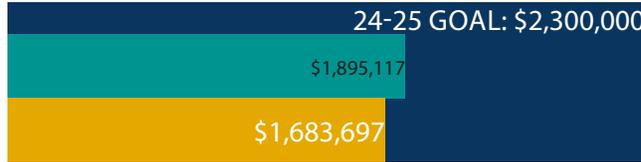
23-24 ACTUALS 24-25 YTD ACTUALS 24-25 ANNUAL GOAL

1 ESTIMATED ECONOMIC IMPACT



The 2024 Estimated Economic Impact, according to Travel Oregon's "Impact of Travel p2024" report for the two-county region, was \$793.3 million (99.5% of goal).

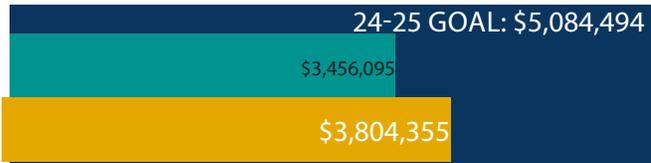
3 LEVERAGE



Q3 Leverage for 24-25 is at 73% of our goal. We expect to reach our goal during Q4.

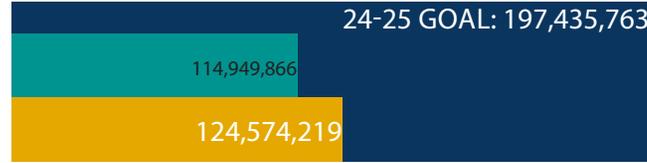
Leverage is down 11% year over year due to timing and economic uncertainty which is impacting business contributions.

2 SALEM TRANSIENT OCCUPANCY TAX (TOT)

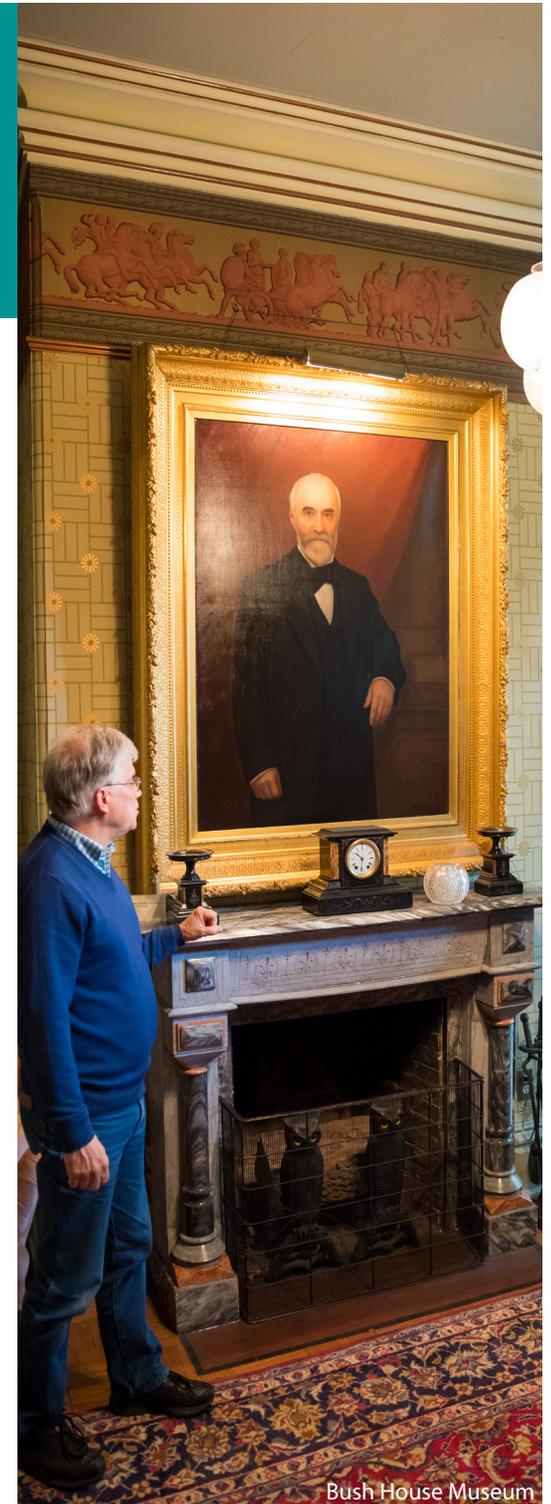


TOT increased 10% from the previous year due to increases in hotel ADR and occupancy (75% of goal).

4 CONSUMER ENGAGEMENT



Overall consumer engagement increased 8% year over year due to timing of advertising placement (63% of goal).

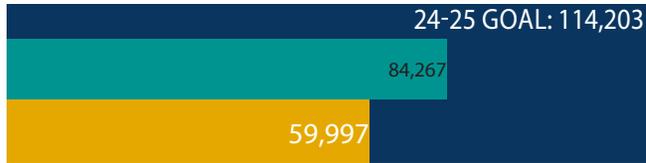


23-24 ACTUALS

24-25 YTD ACTUALS

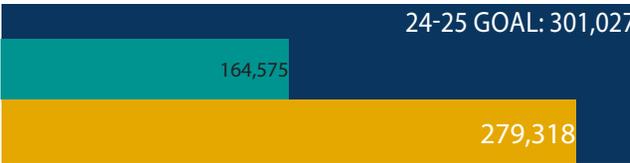
24-25 ANNUAL GOAL

5 VISITOR INFORMATION NETWORK



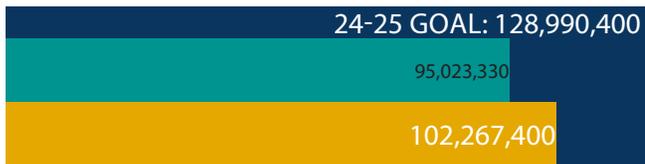
Visitor Information Network attendance decreased by 29% year over year due to a lack of signage on I-5, which should be replaced in FY 25-26, and the loss of two satellite visitor info locations due to remodeling (The Hotel Salem, Best Western Plus Mill Creek Inn).

8 ONLINE VISITS



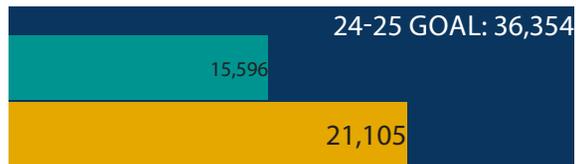
Published 3 blogs that drove 25,275 webpage views. Blogs highlighted art, music & theater throughout the region; accessible & adaptive fun; and winery Cellar Season (93% of goal).

6 EARNED MEDIA IMPRESSIONS



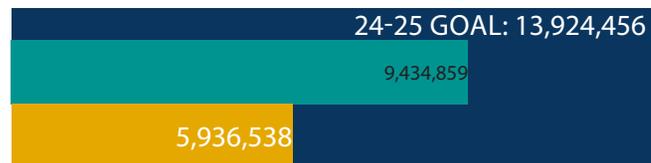
Public relations was transitioned to a contractor for FY 24-25, which is generating PR in the pipeline (8% decrease due to timing).

9 CONVENTION & SPORTS ROOM NIGHTS



Actualized room night production has increased 35% compared to Q3 of last year. The increase is due to USA Softball 10B/12B Western Nationals tournament and timing.

7 SOCIAL MEDIA REACH



STPA marketing budget reductions resulted in: 1) Decreased social media boosting, and 2) The transition of social media and content creation to a part-time contractor. This led to a 37% decrease in social media reach.



Xicha Brewing

core areas of focus

Strategic Imperative: INCREASE VISITOR-RELATED ECONOMIC IMPACT

EXTERNALLY FOCUSED

INTERNALLY FOCUSED

Destination Experience [DE]

Create transformative experiences utilizing deep industry expertise & unsurpassed product knowledge that connect visitors and residents.

Destination Development [DD]

Enhance destination appeal and competitive edge through strategic and sustainable initiatives and product development.

Destination Marketing [DM]

Blaze The Most Oregon Part of Oregon brand and promote the region as a premier destination to create demand for group & leisure travelers.

Organization Optimization [OO]

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

Destination Experience [DE]		Destination Development [DD]		Destination Marketing [DM]		Organization Optimization [OO]	
OBJECTIVE	MEASUREMENT	OBJECTIVE	MEASUREMENT	OBJECTIVE	MEASUREMENT	OBJECTIVE	MEASUREMENT
1. Expand the footprint of destination information, engagement & proactive outreach	→ Visitor network traffic & visitor promotional outreach	1. Develop product for the non-peak season (Nov-Mar) when visitation is lower (e.g., campaigns, trails, events)	→ Increase shoulder season product	1. Unite Mid-Willamette Valley partners through shared vision, advocacy & collaboration	→ Implement a unified messaging strategy with economic development partners	1. Leverage complex & dynamic funding streams to maximize economic impact	→ Maintain diversified revenue streams and successfully implement the Tourism Promotion Area program
2. Strengthen the capacity of the tourism ecosystem by providing industry training & resources	→ Number of industry partners reached through education & training, and any resulting outcomes	2. Work with the Salem Area Sports Commission (SASC) to cultivate the sports/recreation sector by recruiting new opportunities and growing existing events	→ Increase sports/recreation sector bookings	2. Craft messaging that differentiates the region's unique attributes through inspirational & actionable content	→ Shift messaging to highlight the people linked to iconic places & focus on defining attributes	2. Adapt human resources to meet industry demands	→ Ensure adequate staffing levels
3. Provide customized group services that respond to the needs of meeting & event planners	→ Number of groups assisted & expand customized services provided	3. Assist the cultural & heritage sector with planning, collaboration & evaluation	→ Improved cultural heritage communications deliverables	3. Secure citywide room nights through innovative group sales strategies	→ Increase group bookings	3. Hone communication & strategic collaboration across program areas	→ Utilize streamlined and effective communication systems
4. Capture visitor feedback through proactive outreach & respond to opportunities with sales and marketing	→ Number of surveys completed and any resulting outcomes	4. Identify & influence initiatives that improve destination accessibility (e.g., wayfinding, commercial air service)	→ New transportation-related initiatives underway	4. Target shoulder season visitation through coordinated sales & marketing efforts	→ Increase shoulder season room nights	4. Utilize technology to streamline productivity & spur innovation	→ Adopt new technology as needed
				5. Promote tourism industry awareness and engage community ambassadors through locally targeted initiatives	→ Increase resident engagement	5. Implement multifaceted vision for new headquarters building	→ Headquarters building operating and fully functional
				6. Leverage key partnerships & strategies to amplify reach & effectiveness	→ Increase visitor engagement	6. Ensure transparency & accountability through detailed reporting, research and stakeholder communications	→ Track stakeholder satisfaction levels and deliver meaningful & user-friendly reports and industry communications
				7. Utilize data & research to anticipate & capitalize on trends & marketing opportunities	→ Utilize data & research to influence marketing decisions		

CORE AREAS OF FOCUS:

Q3 highlights

Below are initiatives from the year that demonstrate progress in Core Areas of Focus from the 2020-25 Strategic Plan

funding sources key



DESTINATION EXPERIENCE (DE)

Create transformative experiences utilizing deep industry expertise & unsurpassed product knowledge that connect visitors with the people and the place.

DE

DESTINATION DEVELOPMENT (DD)

Enhance destination appeal and competitive edge through strategic and sustainable initiatives and product development.

DD

VISITOR CENTER DISPLAYS

[DE 1]



The Salem Visitor Center featured the following exhibits:

- Artists in Action "Parasol Project" display for Cherry Blossom Day and season.
- Willamette Heritage Center "Sheep to Shawl" event.
- The Lord & Schryver Conservancy and Englewood Park.



WHEEL THE WORLD [DD 4]



Travel Salem is partnering with Travel Oregon and Wheel the World (WTW) to ensure every visitor can explore and experience the Salem region without limitations. This initiative is about accessibility.

Ten locations are being assessed and will receive a report with suggested enhancements to meet the needs of all visitors. WTW also expands Salem's marketing message of accessibility throughout the world.

MID-WILLAMETTE VALLEY TOURISM ECONOMIC DEVELOPMENT CONSORTIUM (DD 1,4)



Greg Leo provided an update on Oregon legislative initiatives that affect tourism and hospitality and how stakeholders can get involved in the legislative process/advocate for the tourism industry and their communities.

CORE AREAS OF FOCUS:

Q3 highlights

Below are initiatives from the year that demonstrate progress in Core Areas of Focus from the 2020-25 Strategic Plan

funding sources key

grant FUNDED	tot FUNDED	wcp FUNDED	stpa FUNDED	wvva FUNDED	flex FUNDED	blend FUNDED
Funded by grants	Funded by Transient Occupancy Tax	Funded by Wine Country Plate program	Funded by Salem Tourism Promotion Area	Funded by the Willamette Valley Visitors Association	Funded by private revenue sources	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 & leisure travelers.



ORGANIZATION OPTIMIZATION (OO)

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



CASCADIA EDUCATIONAL CONFERENCE [DM 3,4,6]



Salem hosted the MPI Cascadia Educational Conference (Mar 2025) generating 375 roomnights.

Travel Salem and the Salem Convention Center co-presented an educational session and participated with the mainstage panel. These opportunities highlight Salem, its venues, and build destination brand for hosting successful events.



2025-2030 STRATEGIC PLAN [OO 1,2,3,4,5,6]

Travel Salem engaged diverse sectors of the industry through comprehensive surveys and facilitated focus group sessions to gather insights and feedback on regional perspective. The plan was adopted by the Travel Salem Board and available on the TravelSalem.com website.



25-26 SALEM & MID-VALLEY VISITOR GUIDE [DM 2,4,6]



Published 120,000 copies of the 2025-26 Visitor Guide with new content promoting the region. Distribution is underway to 800 locations throughout Oregon, Washington, California and British Columbia.

The Visitor Guide also serves as the response piece to advertising and relocation inquiries.



TENANT SPACE AVAILABLE [OO 5]



The daylight basement of Travel Salem's headquarter building is fully renovated and ready for lease.

DESTINATION MARKETING [DM]

Q3 highlights

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

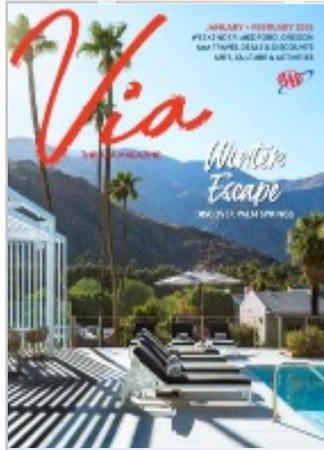


public relations

MSN LIFESTYLE

"It's Almost Time to Celebrate Cherry Blossoms at the Oregon State Capitol"

Ad Value: \$40,000
Circulation: 8,000,000

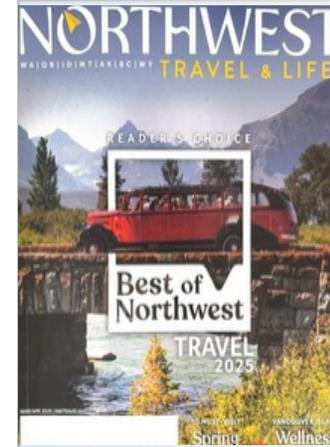


VIA MAGAZINE

"Raise the Curtain: Historic Theaters are Restored as Community Centers"

Highlighted: The Elsinore Theatre

Ad Value: \$28,000
Circulation: 3,600,000



NORTHWEST TRAVEL & LIFE

"10 Must See Spring Gardens"

Highlighted: The Oregon Garden

Ad Value: \$8,700
Circulation 125,000

social media

CHERRY BLOSSOMS AT THE OREGON STATE CAPITOL

Combined Reach: 76,000



Cherry Blossom Day at the Capitol!

SWEET TREATS IN THE SALEM REGION

Featured: Gerry Frank's Konditorei, Dough Hook Bake Shop & Maravilla's Bakery

Combined Reach: 27,000



SEBRIGHT GARDENS (VIDEO)

Combined Reach: 38,000





Travel Salem is pleased to present the 24-25 Third 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 2020-2025 Strategic Plan and the 2024-25 Business Plan, and drive toward the imperative to increase visitor related economic impact through four core areas of focus: destination experience, destination development, destination marketing, and organization optimization.

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