

Q3

report

2025-2026 | JAN, FEB, MAR



SALEM CAPITOL

THE MOST OREGON
PART OF OREGON



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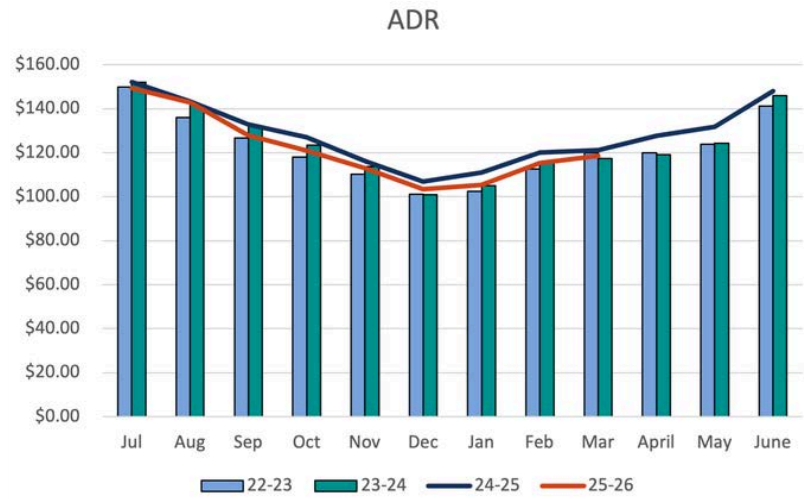
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Q3 executive summary

Transient Occupancy Tax (TOT) revenues decreased 4.6% YOY, driven by a 3.6% decrease in hotel ADR and a 2.6% decrease in occupancy. TravelSalem.com website visits were 390% above prior year due to a strategic shift in paid search advertising targeting always on evergreen content running simultaneously on high-traffic networks. Convention and sports room nights increased 7% year over year reflected by post-event surveys from meeting and event planners and lodging facilities. Attendance at three group sales tradeshows rounded out the quarter securing 35 appointments with meeting planners resulting in quality leads, RFPs and familiarization tours of Salem. The economy is having an impact but we remain committed to our programming and outreach.

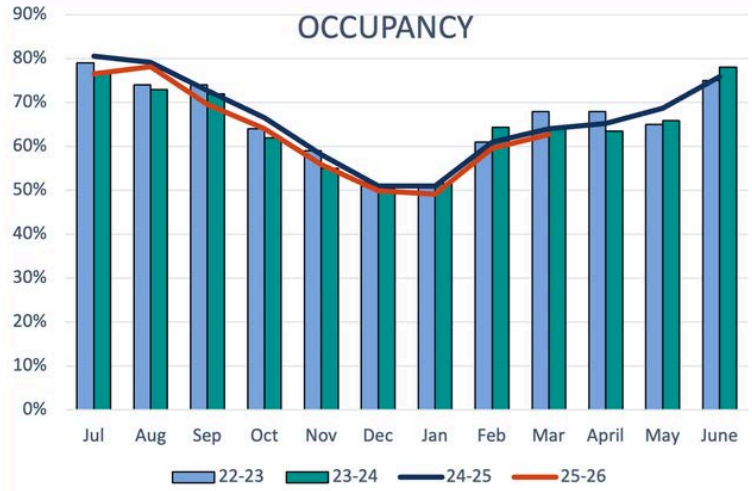
AVERAGE DAILY RATE (STR)

2025-26 HOTEL ADR -3%



OCCUPANCY (STR)

2025-26 HOTEL OCCUPANCY -3.3%



MARKETING

YTD

ADVERTISING

11,380,421
Digital Impressions
(Online Ads, GoogleAds, Social Media, Blogs, Expedia)

264,574
Print Ad Impressions

17,773
Hotel Room Nights

\$2,386,524
Hotel Revenue

PUBLIC RELATIONS

131,628,618
Earned Media Impressions

\$507,600
Earned Media Value

SALES

CONVENTIONS

YTD ACTUALS

\$590,388
EEI

993
Room Nights

BOOKED

\$17,862,904
EEI

36,054
Room Nights

FUTURE DEFINITE

\$19,323,792
EEI

37,581
Est. Room Nights

SPORTS*

YTD ACTUALS

\$18,319,394
EEI

21,527
Room Nights

BOOKED

\$18,243,570
EEI

35,535**
Room Nights

FUTURE DEFINITE

\$49,479,157
EEI

54,186
Est. Room Nights

* 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 65% higher than actuals, yet Actual EEI is less than 1% higher. 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

Travel Salem Influenced
\$2,632,241

TOTAL TOT
\$3,630,407

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.



Enchanted Forest

PERFORMANCE MEASUREMENT*	25-26 ACTUAL	% GOAL	25-26 ANNUAL GOAL	24-25 ACTUAL
1 Estimated Economic Impact	TBD	%	↑2% = \$809,166,000	\$793,300,000
2 Salem Transient Occupancy Tax (TOT)**	\$3,630,407	65%	↑5% = \$5,563,931	\$5,298,982
3 Leverage	\$2,441,091	84%	\$2,900,000	\$2,859,290
4 Consumer Engagement	176,100,758	87%	↑15% = 201,394,658	175,125,790
5 Visitor Information Network Attendance	57,588	67%	↑6% = 85,071	80,256
6 Earned Media Impressions	131,628,618	88%	↑5% = 148,871,415	141,782,300
7 Social Media Reach***	12,174,276	107%	↑12% = 11,346,838	10,131,106
8 Online Visits****	1,369,406	303%	↑10% = 452,386	411,260
9 Convention & Sports Actual Room Nights	22,520	71%	↑10% = 31,520	28,655

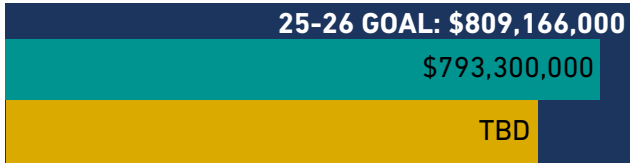
* Targets are based on normal market conditions and don't take into consideration significant impacts such as pandemic, recession, depression, natural disasters, fuel anomalies, etc.
 ** Outcomes influenced by fluctuations in ADR, occupancy. Currently, data only available through Aug.
 *** Methodologies 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

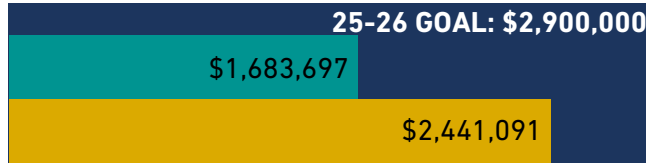
24-25 ACTUALS	25-26 YTD ACTUALS	25-26 ANNUAL GOAL
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1 ESTIMATED ECONOMIC IMPACT



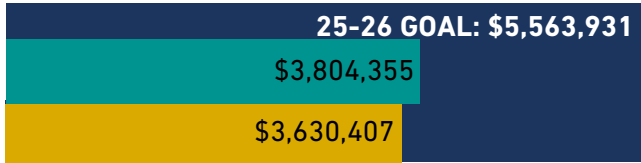
The 2025 Estimated Economic Impact, for the two-county region, will be published by Travel Oregon in May 2026.

3 LEVERAGE



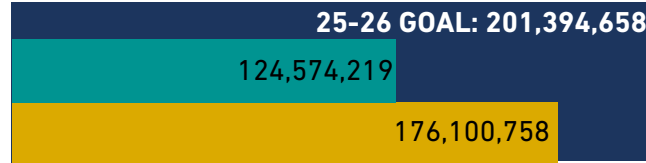
Q3 leverage is 84% of goal, and 45% higher than prior year actuals. This is due to the timing of when 24-25 WVVA data was recognized, which will level out as the year progresses.

2 SALEM TRANSIENT OCCUPANCY TAX (TOT)

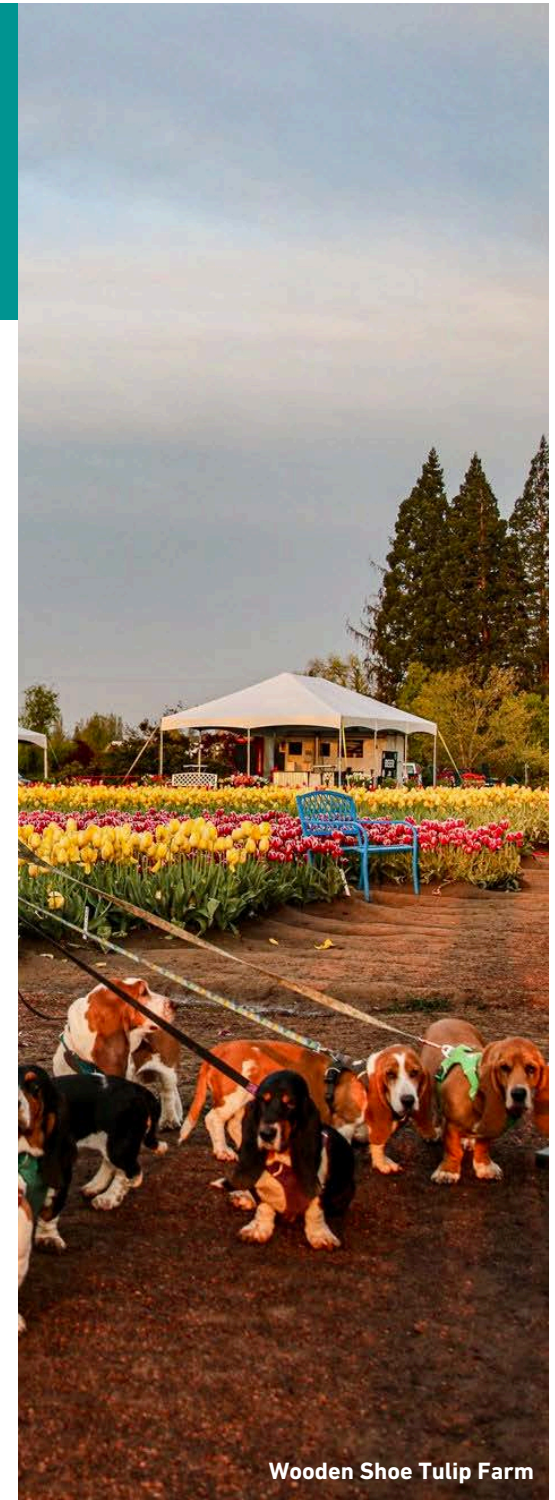


Transient Occupancy Tax (TOT) revenues decreased 4.6% YOY, driven by a 3.6% decrease in hotel ADR and a 2.6% decrease in occupancy. With gas prices reaching \$5+ per gallon and economic uncertainty, consumers are being more conservative in their discretionary spending.

4 CONSUMER ENGAGEMENT



Overall consumer engagement increased 41% YOY due to more social media engagement and website visits.



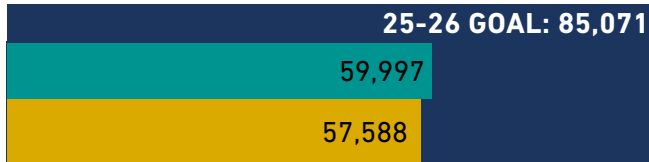
Wooden Shoe Tulip Farm

24-25 ACTUALS

25-26 YTD ACTUALS

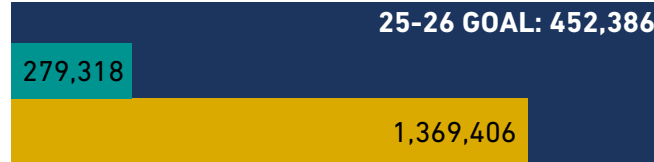
25-26 ANNUAL GOAL

5 VISITOR INFORMATION NETWORK



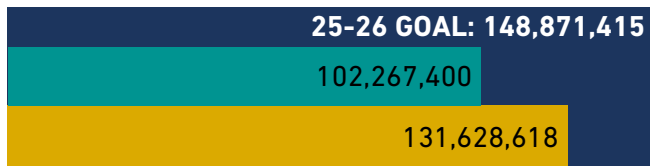
Visitor Information Network attendance decreased 4% year over year, primarily due to three hotels no longer participating as satellite visitor center locations: Best Western Mill Creek Inn, Holiday Inn, and Hotel Salem.

8 ONLINE VISITS



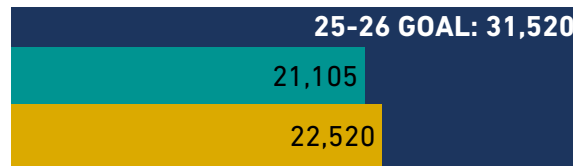
Online visits increased 390% over the previous year due to a strategic shift in paid search advertising, including two Performance Max campaigns targeting evergreen content and seasonal lodging across multiple high-traffic networks simultaneously, including Google Search, YouTube, Gmail and Display.

6 EARNED MEDIA IMPRESSIONS



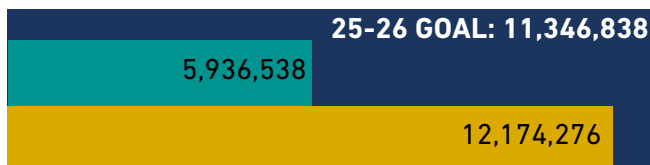
Earned media impressions increased 29% YOY, driven by editorial placements in major publications such as Yahoo Travel, which reaches an audience of more than 26 million readers.

9 CONVENTION & SPORTS ROOM NIGHTS

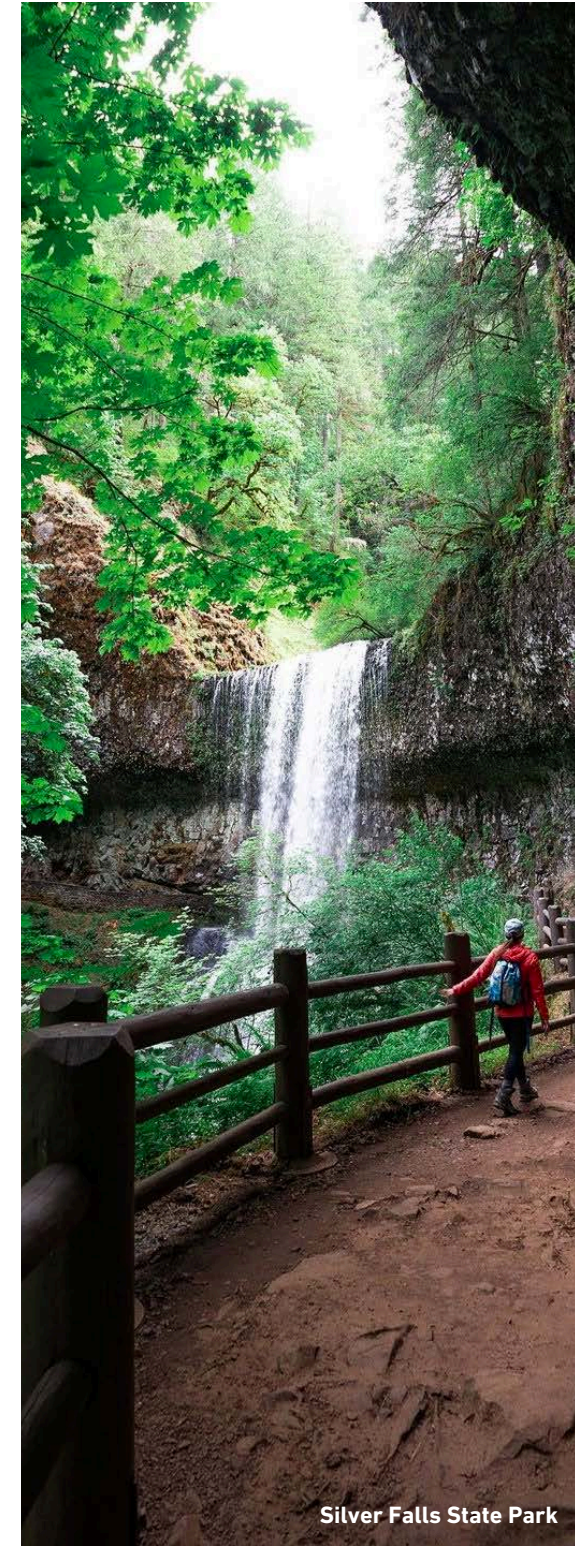


Convention and sports room nights increased 7% YOY. Travel Salem has seen increased participation from event organizers and lodging partners in post-event surveys, resulting in higher-quality data. This improved data collection is providing a clearer and more accurate understanding of event visitation and overall participation.

7 SOCIAL MEDIA REACH



Social media reach increased 105% YOY, driven by a focus on short-form video content across platforms such as YouTube Shorts and TikTok. Consistent posting significantly boosted audience engagement and visibility. Keyword-rich captions improved content discoverability in search results, amplifying reach.



Silver Falls State Park

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

- | | |
|--|---|
| <ol style="list-style-type: none"> 1. Implement dynamic communications & industry relations programs to enhance the perception of the region with consumers & residents 2. Implement strategic sales & marketing initiatives to drive more group & sports business 3. Refresh Travel Salem brand to celebrate the unique character of the region 4. Drive shoulder season visitation (Nov-Mar) 5. Highlight regional EDI experiences to meet all consumer needs 6. Identify & engage with strong & emerging consumer target audiences (e.g., Latinx/Hispanic, generational travelers) to increase reach & visitation | <ul style="list-style-type: none"> ➔ Annual visitor & resident sentiment surveys • Social media sentiment • Media engagement & impressions • In-person visitor comment • Speakers bureau impact <ul style="list-style-type: none"> ➔ Sales pipeline reports • ROI (Estimated Economic impact calculator) • Post trade show reports • Post group surveys <ul style="list-style-type: none"> ➔ Survey brand resonance with visitors, residents & stakeholder <ul style="list-style-type: none"> ➔ Advertising calendar, geo-tracking, hotel data, Avelo passengers & sales pipeline report <ul style="list-style-type: none"> ➔ Apply an EDI lens to all strategies & initiatives <ul style="list-style-type: none"> ➔ Partner with Mid-Willamette Valley leaders & organizations (e.g., Hispanic Business Alliance, AARP, Center 50+); increased visitation from target audiences |
|--|---|

OBJECTIVE

MEASUREMENT

- | | |
|--|---|
| <ol style="list-style-type: none"> 1. Develop & implement a sports master plan to maximize destination potential 2. Engage with partners to retain & recruit commercial air service 3. Research & identify regional EDI experiences to broaden demographic reach & improve destination accessibility 4. Advocate on behalf of the industry to promote key priorities that enhance livability & destination experience 5. Unite Mid-Willamette Valley partners through shared vision, advocacy & collaboration | <ul style="list-style-type: none"> ➔ Annual venue capacity, quality & footprint of existing events, new business recruitment, improvements to venue inventory ➔ Grow existing service & secure new service ➔ Increase EDI assets & experiences ➔ Annual visitor & resident sentiment surveys ➔ Implement a unified messaging strategy with economic development partners |
|--|---|

OBJECTIVE

MEASUREMENT








- | | |
|--|--|
| <ol style="list-style-type: none"> 1. Leverage complex & dynamic funding streams to maximize economic impact 2. Adapt human resources to meet industry demands 3. Hone communication & strategic collaboration across program areas to efficiently & seamlessly execute initiatives 4. Utilize technology to streamline productivity & spur innovation 5. Ensure detailed reporting, research & stakeholder communication to educate, engage & empower the industry | <ul style="list-style-type: none"> ➔ Maintain diversified revenue streams ➔ Ensure adequate resources through a mix of in-house staffing & contractors ➔ Utilize streamlined & effective communication systems ➔ Adopt new technology as needed ➔ Deliver meaningful, user-friendly reports & industry communications |
|--|--|

CORE AREAS OF FOCUS:

Q3 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	 tot FUNDED	 wep 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

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.

TRAVEL SALEM 2026-27 VISITOR GUIDE [DM 1]



Travel Salem released the 2026-27 Visitor Guide, distributing 120,000 copies across 800 locations throughout Oregon, Washington, California and British Columbia, putting the region directly in the hands of prospective visitors across the Pacific Northwest and beyond.



GROUP SALES TRADESHOWS [DM 2]



- Meeting Professionals International Cascadia: Conducted 20 appointments with meeting planners, sponsored the First Timers Reception (50 attendees), generating 2 follow-up virtual presentations and 1 planner FAM to Salem (April 20-21).
- Greater Oregon Society of Government Meeting Professionals Conference: Met with 7 planners across 5 Oregon state departments.
- Government Meeting Planners Lunch N' Learn: Connected 8 local government planners with 6 Salem venues, generating 1 RFP.



KPTV ADVERTISING CAMPAIGN [DM 4]



Year-to-date, the KPTV weather cam and digital ad campaign has generated 521 broadcast weather cam views and mentions, and 3,029,444 digital impressions, producing an estimated 300 hotel room nights and \$42,000 in hotel revenue.



TRAVEL SALEM AD PLACEMENTS [DM 4]



- Travel Oregon February Culinary E-Newsletter
 - 58,000 impressions
 - Highlighted Salem's beer scene
 - Drove traffic to the Beer Month blog on TravelSalem.com
- Travel Oregon March Outdoor E-Newsletter
 - 85,000 impressions
 - Highlighted the region's gardens
 - Drove traffic to the 2025 Garden Hopping blog on TravelSalem.com
- TravelOregon.com Ad: 167,354 impressions, 786 clicks, 0.47% click-through rates

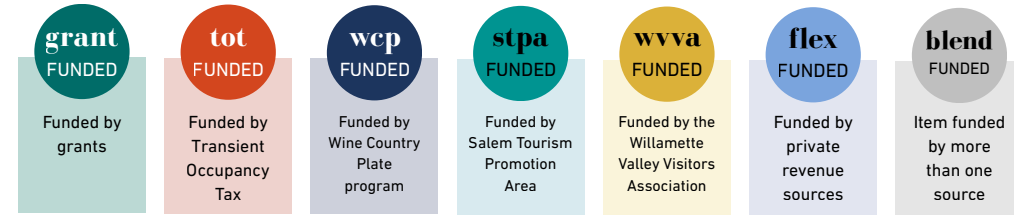


CORE AREAS OF FOCUS:

Q3 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 MANAGEMENT

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

ORGANIZATIONAL OPTIMIZATION

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

RESILIENT HEADWATERS TRAIL DEVELOPMENT [DMGMT 3, 4]



The Resilient Headwaters project added 1.35 miles of new trail in the Santiam Canyon, expanding accessible outdoor recreation in the region. Community volunteers contributed more than 720 hours, reflecting strong community investment in growing the region's trail network.



INTERNSHIP PROGRAM [DMGMT 4]



Developed an internship program to support cultural heritage organizations with limited capacity while providing interns with real-world experience. Interns have been placed with the Willamette Heritage Center and the Salem Multicultural Institute with meaningful project work underway.



AMERICA 250 GRANT [00 1]



Travel Salem was awarded an America 250 grant to install a photo mural installation on the outside of their headquarter's building located on Center Street. The mural highlights the region's indigenous people, scenic beauty and broader historical context that shaped Oregon and our nation.

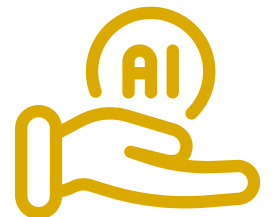


ORGANIZATION AI AUDIT [00 4]



AI was used to identify where routine tasks, such as research, content creation and administrative work could be streamlined. Reducing time on those tasks enables staff to focus on higher-value work that requires creativity, critical thinking and relationship-building.

Each department received a report with AI recommendations that are flexible, enabling them to adopt AI at their own pace and within budget, ultimately improving efficiency and overall productivity.



DESTINATION MARKETING [DM]

Q3 highlights

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

funding sources



public relations



YAHOO TRAVEL

"Oregon's Largest State Park Has a Famous 7-Mile Trail That Takes You to 10 Waterfalls"

Highlighted: Silver Falls State Park

Ad Value: \$39,000
Circulation: 26,600,000

YAHOO!
TRAVEL



AFAR MEDIA

"Where to Go for Spring Break: 5 Great U.S. Road Trips for Every Family"

Highlighted: Enchanted Forest, Gilbert House, Wooden Shoe Tulip Festival

Ad Value: \$26,250
Circulation: 2,500,000

AFAR



NORTHWEST TRAVEL & LIFE MAGAZINE

"Skip the Crowds, Find the Flowers: A Weekend in Salem"

Highlighted: Oregon State Capitol, The Oregon Garden, Wooden Shoe Tulip Festival

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

social media



"YOZAKURA: NIGHT TIME CHERRY BLOSSOM VIEWING"

Highlighted: Oregon State Capitol

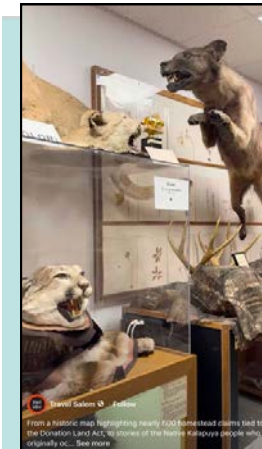
Combined Views: 155,414
Engagements: 6,189



"RAMEN SPOTS AROUND THE REGION"

Highlighted: Ibendoo Ramen, Akai Ramen & Izakaya, Kagoshima Ramen House, Fin and Fowl Kitchen, Ginza Sushi & Ramen

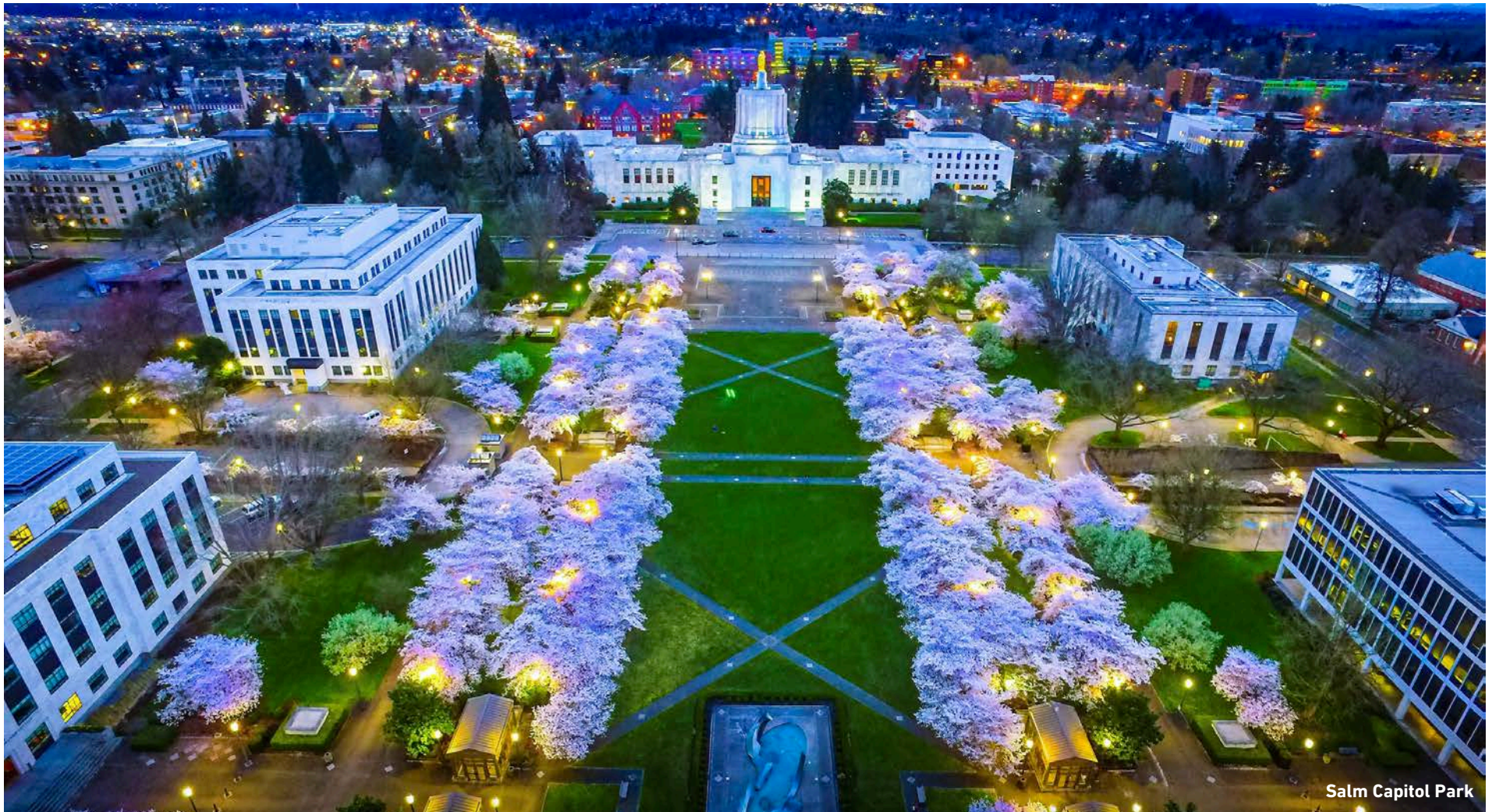
Combined Views: 71,682
Engagements: 2,470



"HIDDEN GEM"

Highlighted: Polk County Museum

Combined Views: 25,405
Engagements: 1,164



Salm Capitol Park



Travel Salem is pleased to present the 2025-26 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 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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