Visitors Profile Study
Salem & the Mid-Willamette Valley
June 2019 - March 2020

Travel Salem implemented the Visitors Profile research project for eight months in 2019-20. The study was to be conducted for a full year but was cut short due to the outbreak of COVID-19 in March 2020.

Below is the summary of the Visitors Profile Study with the most notable findings.

summary

1. The region’s traveling party consists of 2.5 adults and 0.4 children
   o Although some traveling parties include children it continues to be a low percentage. This is reflected in #11 the detail regarding the age of visitors (68% between the age of 45-65+ and 32% between 18-44)

2. Visitors spend an average of $560 per visit per traveling party (average of $187 per person per day)

3. 51% of visitors to the region are day visitors
   With half of all visitors to the region visiting for the day it is imperative to offer the best customer service and provide more luring information about the region to convert these day travelers into future overnight visitors.

4. 49% of visitors to the region are overnight visitors
   o 4.7 nights is the average overnight stay (a 135% increase from last study conducted in 2011-12 which was 2 nights)
   o Accommodations used
     ▪ 20% Friends & Family
     ▪ 19% Hotel/Motel
     ▪ 4% Vacation Rental
     ▪ 3% Bed & Breakfast
     ▪ 3% RV
     ▪ 0.5% Campground
5. Visiting friends and family (VFF) is still the primary reason (27\%) for travel to the two-county region. This substantiates the importance of reaching out to locals and converting them into ambassadors for the area.
   - Commercial accommodations are used by 7\% of VFF, with 20\% staying with friends and family.

After VFF travel, the top 10 reasons that motivated travel to the region include:

- 25\% Heritage
- 24\% Events
- 22\% Food
- 21\% Wine
- 20\% Outdoors
- 19\% Arts & Culture
- 12\% Shopping
- 12\% Beer or Cider
- 9\% Other
- 9\% Spur of the Moment

6. Once in the region these are the top 10 activities visitors actually did:

- 47\% Food
- 39\% Heritage
- 31\% Arts & Culture
- 30\% Shopping
- 29\% Events
- 29\% Outdoor
- 27\% Wineries
- 22\% Visiting Friends & Family
- 16\% Beer & Cider
- 15\% Agriculture

Shopping jumped from 12\% (what motivated travel) to 30\% (actual activities).
Shopping is notably important to a visitor’s experience.

These findings substantiate the three main pillars that Travel Salem bases the majority of its marketing strategies – Cultural Heritage, Culinary and Recreation.
7. When asked which Travel Salem marketing strategies assisted with their decision to visit, 72% of respondents selected those highlighted in red:

- 21% Word of Mouth
- 18% Social Media
- 17% Visitors Guide
- 11% Visitors Center or Kiosk Site
- 9% TravelSalem.com
- 8% Other
- 6% Advertisement
- 5% Signage
- 6% Another website
- 6% Article

Word of Mouth, at 21%, was the largest influence on a visitor’s decision to travel to the region. Once again, highlighting the importance of locals serving as ambassadors for the region.

Social Media continues to grow as a major consumer influencer and is a critical communication channel influencing word of mouth recommendations by consumers sharing their experiences with friends and family. This engagement with consumers is authentic & voluntary and serves as an endorsement from an unbiased third-party source.

8. Survey respondents rated their satisfaction with their visit to the Salem region as an 8.7 out of 10 (10 = best)

9. The top 5 areas the Salem region could improve upon included:
   - 35/10% Nightlife
   - 33/10% Other
   - 30/9% Cleanliness
   - 27/8% Transportation
   - 27/8% Road Conditions

10. Respondents were asked to describe the Salem region in 3 words. The top 20 responses were:

1. Beautiful (breathtaking, spectacular, pretty, lovely)
2. Friendly
3. Historical (vintage)
4. Natural (nature, wilderness, trees, forest)
5. Entertaining (fun)
6. Good (gracious, kind, happy, helpful, caring, nice)
7. Verdant (green, lush)
8. Clean
9. Weather (temperate, hot, cold, warm, rainy)
10. Central (location, hub, accessible)
11. Wine (Pinot noir)
12. Classic
13. Exciting (energized, lively, eventful)
14. Charming (quaint, enchanting)
15. Peaceful (quiet, serene)
16. Diverse (variety)
17. Interesting (unexpected)
18. Capitol (government)
19. Authentic
20. Relaxing (relaxed, laid back)

99.9% of words to describe the region were positive illustrating visitor’s sentiment.
11. **36%** of visitors to the region are **65+** years of age with **18%** between **35-44**

- 36% = 65+
- 17% = 55-64
- 15% = 45-54
- 18% = 35-44
- 10% = 25-34
- 5% = 18-24

12. **96%** of the respondents were from the U.S with **27** states represented

- **44%** Oregon
- **14%** California
- **12%** Washington
- 3% each Arizona & Nevada 3% each
- 2% each Colorado, Pennsylvania, Illinois, Minnesota
- 1% each Montana, Maine, Texas, Alabama
- 0.5% each Louisiana, Utah, Florida, Michigan, Vermont, Arkansas, Iowa, Indiana, New York, Virginia, Missouri, Oklahoma, Ohio, Massachusetts

**4%** of the respondents were International visitors

- 1% Canada
- 0.5% each India, Germany, England, Australia, Mexico

Oregon, California and Washington travelers continue to be vital to the region’s tourism industry. Without a doubt, domestic visitation is the strongest market for the Salem region pulling visitors from 27 U.S. states.

Due to COVID-19 international travel is expected to stay in decline and not return until 2024.

13. **26%** of respondents subscribed to Travel Salem’s communications (blogs & events)

This illustrates interest in the region and the importance of frequent communication to encourage repeat visits.

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Original Data

Survey Sites:
- Travel Salem Visitors Center (74)
- Oregon State Fair (56)
- Deepwood Estate & Gardens (53)
- Willamette Heritage Center (15)
- Art Fair & Festival (30)
- Spirit of Oregon (16)
- World Beat Festival (15)
- NW Ag Show (13)
- Oregon State Capitol (10)
- Bush House Museum (9)
- Gilbert House Children’s Museum (8)
- Left Coast Cellars (7)
- Downtown Salem (State Street) (6)
- Andante Vineyards (5)
- Grand Hotel Salem (3)
- Capitol City Classic (3)
- Willamette Valley Vineyards (17)

Completed Surveys: 340

1. **How many people are in your traveling party?** 2.5 adults and 0.4 kids on average

2. **How much money do you plan to spend/have you spent during your visit?** $560 per party = $120 per day

3. **Are you visiting for the day?** 172/51% Yes

4. **Are you staying overnight?** 161/49% Yes
   - **If yes, how many nights?** 4.7 average
   - **Where are you staying?**
     - 68/20% Friends & Family
     - 64/19% Hotel/Motel
     - 13/4% Vacation Rental
     - 9/3% Bed & Breakfast
     - 9/3% RV
     - 2/0.5% Campground
5. **Why did you come to the Salem area? (check all that apply)**

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>92/27%</td>
<td>Friends &amp; Family</td>
</tr>
<tr>
<td>86/25%</td>
<td>Heritage/History &amp; Museums</td>
</tr>
<tr>
<td>82/24%</td>
<td>Events</td>
</tr>
<tr>
<td>76/22%</td>
<td>Food</td>
</tr>
<tr>
<td>73/21%</td>
<td>Wineries</td>
</tr>
<tr>
<td>68/20%</td>
<td>Outdoor Recreation</td>
</tr>
<tr>
<td>66/19%</td>
<td>Arts &amp; Culture</td>
</tr>
<tr>
<td>42/12%</td>
<td>Shopping</td>
</tr>
<tr>
<td>41/12%</td>
<td>Beer or Cider</td>
</tr>
<tr>
<td>32/9%</td>
<td>Other</td>
</tr>
<tr>
<td>30/9%</td>
<td>Spur of the Moment</td>
</tr>
<tr>
<td>28/8%</td>
<td>Agriculture</td>
</tr>
<tr>
<td>27/8%</td>
<td>Children’s Activities</td>
</tr>
<tr>
<td>19/6%</td>
<td>Business or Conference</td>
</tr>
<tr>
<td>19/6%</td>
<td>Sports Event Participant</td>
</tr>
<tr>
<td>7/2%</td>
<td>Sports Event Spectator</td>
</tr>
</tbody>
</table>

6. **What type of activities are you doing on your visit? (Check all that apply)**

<table>
<thead>
<tr>
<th>Percentage</th>
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<tbody>
<tr>
<td>160/47%</td>
<td>Food</td>
</tr>
<tr>
<td>132/39%</td>
<td>Heritage/History Museums</td>
</tr>
<tr>
<td>105/31%</td>
<td>Arts &amp; Culture</td>
</tr>
<tr>
<td>102/30%</td>
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<td>15/4%</td>
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7. Did any of the following Travel Salem marketing strategies assist with your decision to visit? (check all that apply)

- **Word of Mouth**: 72/21%
- **Social Media**: 63/18%
- **Travel Salem Visitor Guide**: 52/17%
- **Visitor Center or Kiosk Site**: 38/11%
- **Travel Salem Website**: 31/9%
- **Other**: 26/8%
- **Salem Advertisement**: 19/6%
- **Signage**: 15/5%
- **Another website**: 10/6%
- **Article**: 20/6%

8. How satisfied are you with your experience in Salem? 8.7/10

In your opinion, what could the Salem region improve upon?

- **Nightlife**: 35/10%
- **Other**: 33/10%
- **Cleanliness**: 30/9%
- **Transportation**: 27/8%
- **Road Conditions**: 27/8%
- **Outdoor Recreation**: 22/6%
- **Events**: 22/6%
- **Dining & Restaurants**: 22/6%
- **Lodging**: 21/6%
- **Signage**: 17/5%
- **Arts & Culture**: 17/5%
- **Heritage/History Museums**: 16/5%
- **Customer Service**: 8/2%
- **Friendliness of local residents**: 8/2%
- **Agriculture**: 6/2%
- **Children’s Activities**: 6/2%
- **Beer & Cider**: 3/0.8%
- **Winery**: 2/0.5%

10. List three words that describe the Salem region
Detailed responses available upon request
11. Age
   - 65+ = 36% (96)
   - 55-64 = 17.2% (46)
   - 45-54 = 14.6% (39)
   - 35-44 = 18% (47)
   - 25-34 = 9.7% (26)
   - 18-24 = 5% (13)

12. 96% of the respondents were from the U.S with 27 states represented.
   - 44% Oregon
   - 14% California
   - 12% Washington
     - 3% each Arizona & Nevada 3% each
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