



**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.
 - o **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

Culinary = Food, Wine, Beer, Cider = 55%
Heritage + Arts & Culture = 44%
Events = 24%
Outdoors = 20%

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

Culinary = Food, Wine, Beer, Cider = 90%
Heritage + Arts & Culture = 70%
Outdoors = 29%
Events = 29%

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.

For more information regarding this survey contact:

Irene Bernards, Director of Marketing & PR

ibernards@TravelSalem.com

503.581.4325 ext. 127

or

Taylor Cantonwine, Marketing Coordinator

tcantonwine@TravelSalem.com

503.581.4325 ext. 125

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)

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

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

160/47%	Food
132/39%	Heritage/History Museums
105/31%	Arts & Culture
102/30%	Shopping
98/29%	Events
97/29%	Outdoor
93/27%	Wineries
75/22%	Visiting Friends & Family
56/16%	Beer & Cider
51/15%	Agriculture
44/13%	Children's Activities
26/8%	Sports Event Participant
17/5%	Other
15/4%	Sports Event Spectator

7. Did any of the following Travel Salem marketing strategies assist with your decision to visit? (check all that apply)

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

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

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

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

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
- 2% each Colorado, Pennsylvania, Illinois, Minnesota
- 1% each Montana, Maine, Texas, Alabama
- .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
- .5% each India, Germany, England, Australia, Mexico

13. 26% of respondents subscribed to Travel Salem's communications (blog & events)

(end)