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State Tourism Office
Website User & Conversion Study

September 2020

Summary of Aggregate Findings

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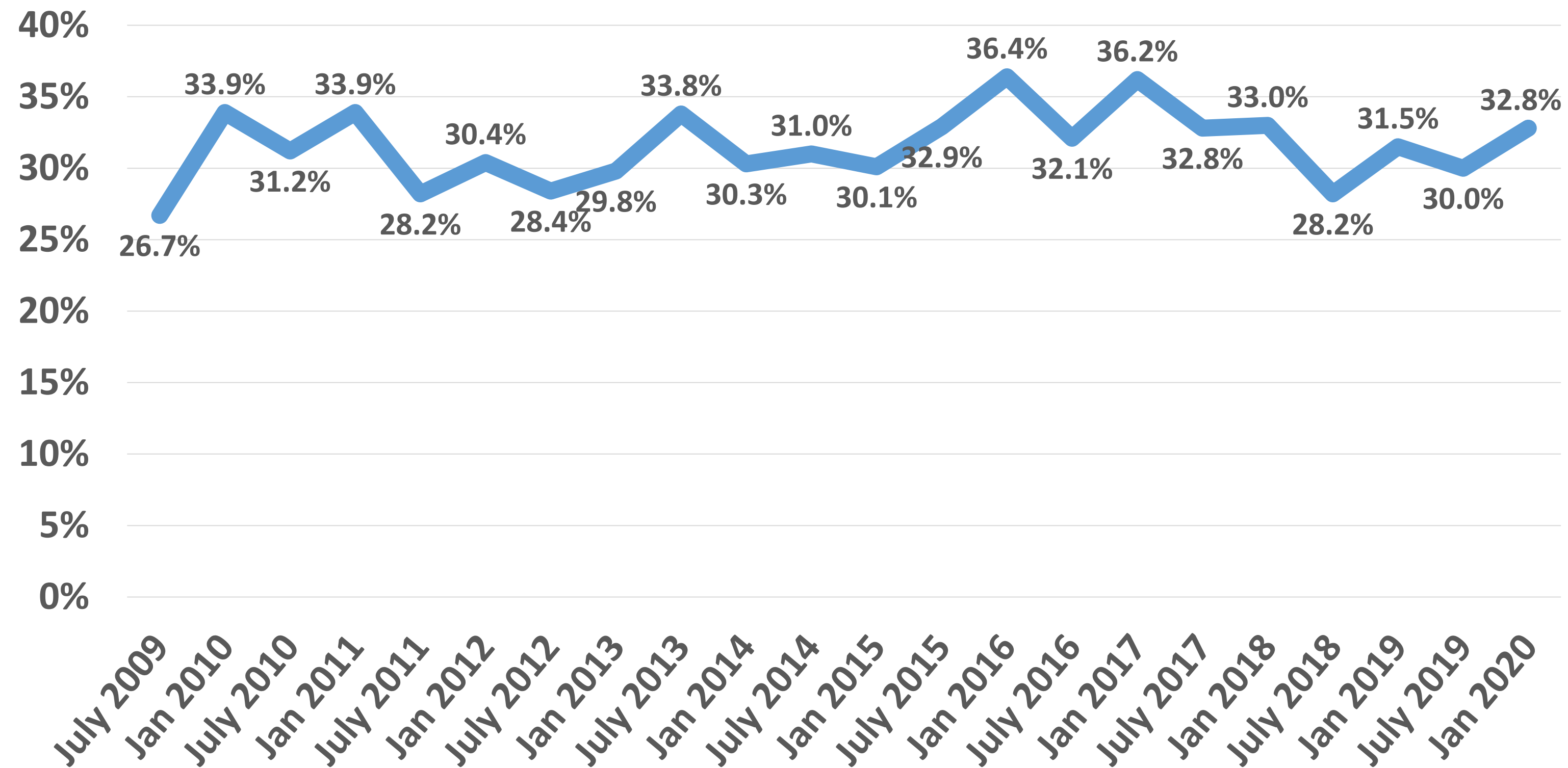
BACKGROUND: TRAVELERS' RELATIONSHIP TO STATE TOURISM OFFICE WEBSITES

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Background: Travelers' Use of Destination Websites—Historic Perspective

American Leisure Travelers' Use of Destination Websites
### 2009-2020

In a time in which travel-related content is ubiquitous across media and travelers are accessing more of it than ever, Destination Marketing Organization (DMO) websites remain an ever-important resource throughout travelers' journeys– from the inspiration to take a trip to the essential details of their itineraries. In fact, in January 2020, one-third of American leisure travelers reported having used a DMO website in the past year to research and/or plan travel—a figure that is up from July 2009*.

*Source: Destination Analysts' *The State of the American Traveler*TM , a quarterly national survey of 2,000+ American leisure travelers

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Background: Travelers' Use of Destination Websites

Planning Resources

Trust, Use and Importance in Destination Selection
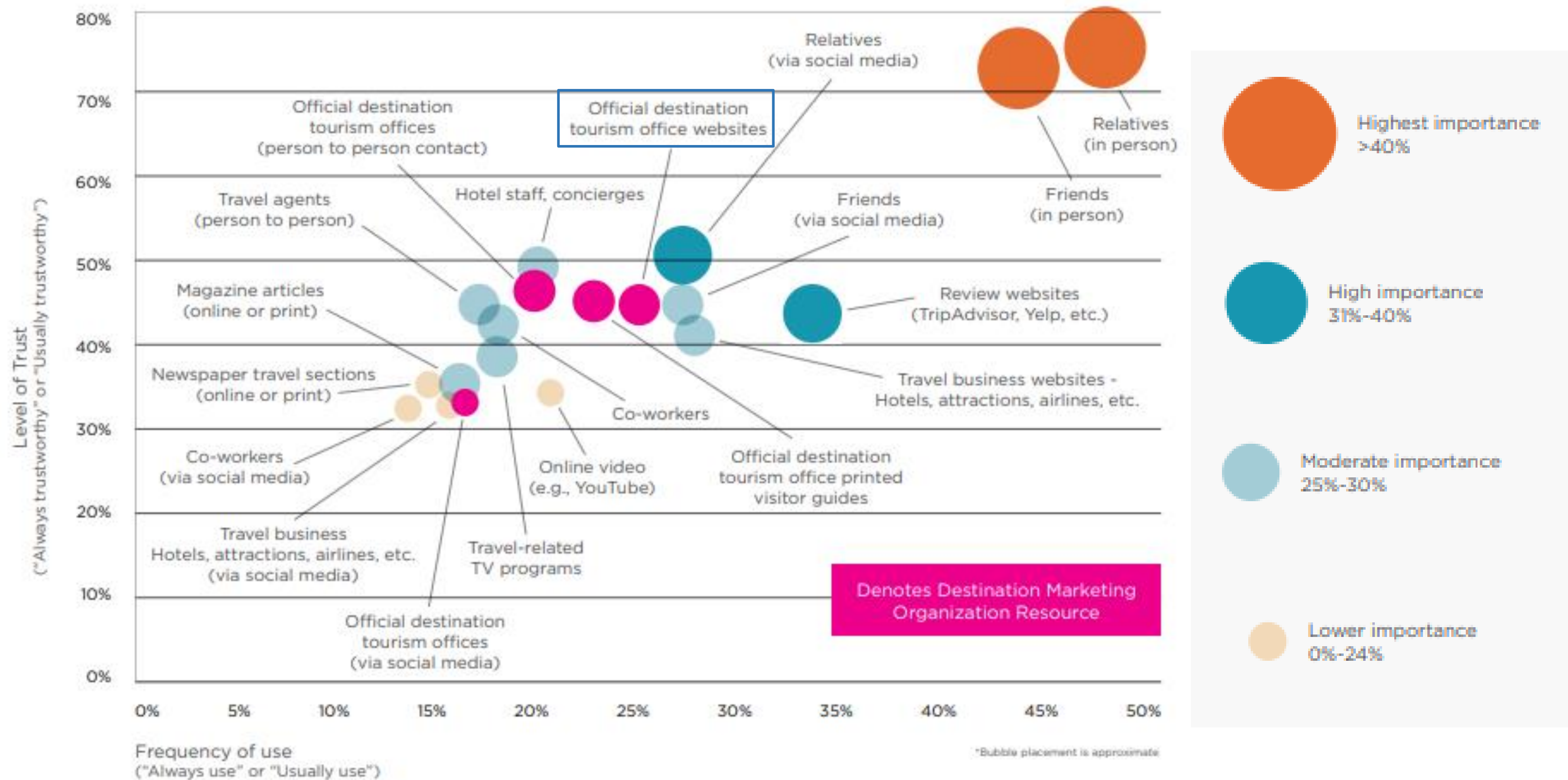
The chart at left provides a comparative view of the key resources used in travel research by mapping their frequency of use (X-axis) against the level of trust travelers place in them (Y-axis) and their weight of importance in the destination decision process (bubble size)*. DMO websites occupy an important position in the landscape of travel resources. These sites are amongst the most trusted and valued resources after travelers' direct contact with their own friends and family. And while they do not yet have the same rate of use as reviews websites such as TripAdvisor and Yelp, they are seen as having equal importance to these sites in travelers' paths to selecting the destinations they will visit.

*Source: Destination Analysts' *The State of the American Traveler*TM ---Technology Edition, April 2018. Base: 2,000 American leisure travelers.

Background: Travelers' Use of Destination Websites

In addition to being a commonly used and trusted travel planning resource, DMO websites are seen by their users as "inspirational," "valuable," "well-organized," and "authoritative" sources of information. The word cloud at right provides an illustrative summary of the words and phrases used to describe DMO websites in qualitative usability research Destination Analysts conducted on such sites. Users of these sites focus on their comprehensiveness and expertise in relaying their value.

Source: Destination Analysts; Usability studies of 8 DMO websites.

RESEARCH OVERVIEW & METHODOLOGY

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Research Overview & Objectives

This report presents the aggregate findings of the nine (9) participating State Tourism Offices in the Official State Tourism Office Website User & Conversion Study. This research was conducted on behalf of these State Tourism Offices from May 2017 through December 2019. The nine (9) states of Alaska, Colorado, Florida, Georgia, Kentucky, Louisiana, Oregon, South Dakota, and Wyoming participated in this cooperative research project and twelve months of consecutive data collection was conducted for each state individually and then aggregated herewith.

The primary objectives of this research were to:

- **Determine Website Return on Investment:** The total amount of direct visitor spending in the participating states that was generated by and attributable to their websites (i.e., the amount of visitor spending in the state that would NOT have occurred in the absence of the website).

- **Develop a Website User Profile:** Demographic, psychographic, attitudinal and behavioral information about website users, as well as content sought on the website.

Above: Logos of the nine participating State Tourism Offices.

Methodology

The Website User & Conversion Study was comprised of two surveys:

(1) The **Website User Intercept Survey** that was completed when a website user was on any participating state tourism office website, and

(2) The **Website User Follow-up Survey** sent after the website user's intended date of travel.

The, findings presented within this report includes data collected in the Website User Intercept Survey and the Follow-up Survey between May 2017 and December 2019.

Above: Example of the Website User Intercept Survey as shown on LouisianaTravel.com.
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Website User Intercept Survey: Upon arriving at the participating State Tourism Office website, a survey appeared requesting site visitors to answer a few questions. The survey questionnaire looked into topics such as website users' motivations for visiting the site, how far along they were in their destination decision process and their anticipated month of travel within the state, as well as permission to send them a follow-up survey after their planned travel.

Website User Follow-up Survey: Survey respondents to the initial Website User Intercept Survey were asked which month they expected to visit the state. At the end of the reported month, these respondents were emailed an invitation to take the Follow-Up Survey. This survey questionnaire asked respondents about topics related to their visitation to the state destination and questions relevant to developing estimates of the website's return on investment.

Methodology (continued)

The data from the two surveys was then combined for each respondent, providing a robust set of data on site users. For each respondent, beginning with their initial planning interactions with the website, the research process allows for tracking actual subsequent in-market behavior. Ultimately, this research technique allowed Destination Analysts to develop estimates of the proportion of users who were converted to a visit by the website and other metrics needed for developing reliable return on investment estimates.

The study's overarching methodology is summarized in the following flow chart:
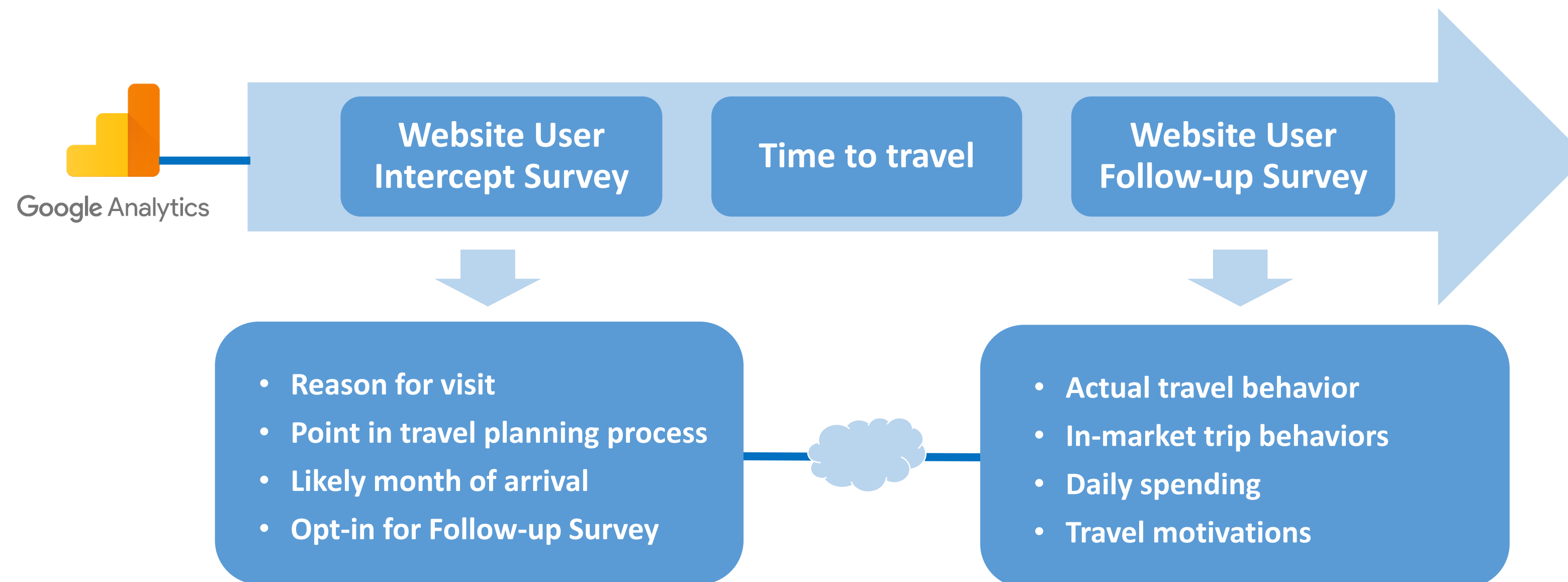
Data weighting: When examining combined data from multiple State Tourism Office (STO) websites, it is important to note that different STO websites experience different levels of user traffic due to a variety of factors. Data presented within this report describing the average website user was weighted to account for these different levels of user traffic. With this weighting plan, the data accurately reflects the overall population of STO website users.

Methodology (continued)

The economic impact estimates derived for this report include all direct spending in the participating states by two types of out-of-state visitors: those who took incremental trips and those who extended the length of their trip based on information found on the website. These two visitor types are distinguished following:

- Out-of-state visitors on **incremental trips** had not fully made up their mind to visit the state destination when they came to the website and stated that the website influenced their decision to ultimately visit the state. Influence on the decision to visit was based on two follow-up survey questions. To be considered an incremental visitor, respondents who had not made up their mind to visit prior to arriving at the website (as stated in the intercept survey) must then state in the follow-up survey that the website helped them make their decision to visit and that it was "Important" or "Very important" to their decision to visit.

- Out-of-state website visitors who **extended their stay** in a participating state can be leisure travelers, business travelers or convention/meeting attendees. Leisure travelers who did not state that the website influenced their decision to visit, and all business and convention travelers were asked a series of questions about the influence of the website on their ultimate length of stay. Economic impact estimates for this group only include spending during reported "additional" days in-market generated by the website.
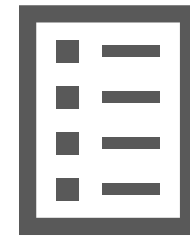
The chart below shows how the website's total ROI estimates were calculated:

Trips Generated
$$$$

+

Trips Extended
$$$$

=

Total ROI
$$$$

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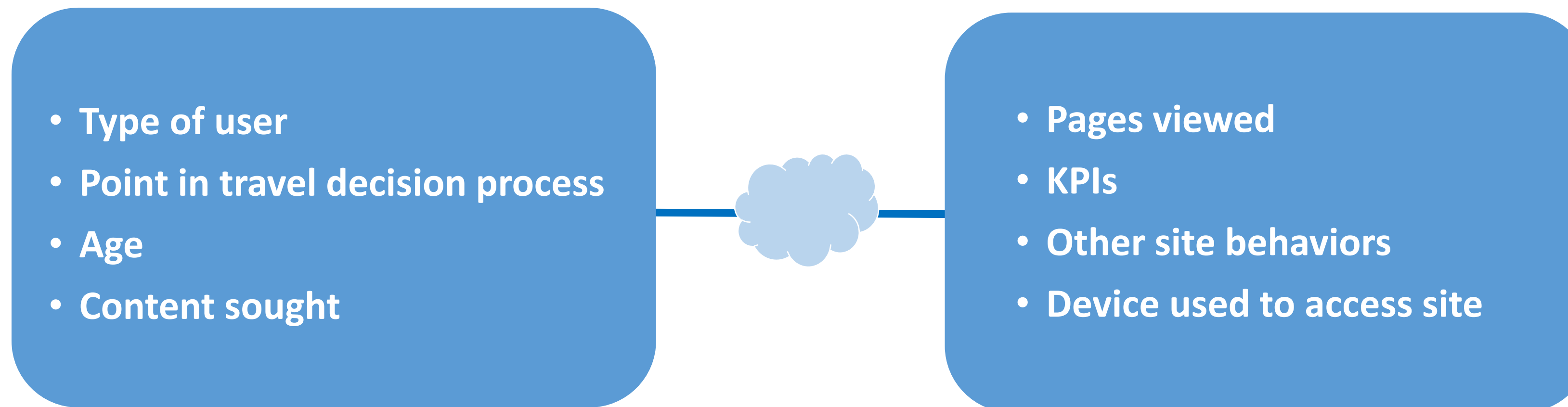
Website Analytics

As the Website User Intercept Survey allows for the integration with the site's analytics, this research includes an analysis of site behaviors and key site performance metrics by user groups identified in the Website User Intercept Survey. Findings derived from the website analytics are also presented within this report.

Website User Intercept Survey

Google Analytics

- **Type of user**
- **Point in travel decision process**
- **Age**
- **Content sought**

- **Pages viewed**
- **KPIs**
- **Other site behaviors**
- **Device used to access site**

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KEY FINDINGS OF STATE TOURISM OFFICE WEBSITE USERS

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# STO WEBSITE USER OUT-OF-STATE KEY FINDINGS

Potential Visitors

70.1% Of out-of-state website users were **potential visitors** who used a state tourism office website to plan a trip to the destination

43.7% Of out-of-state potential visitors were **subject to influence by the website in making the destination decision** ("Interested" and "Considering")

Visitation to Destination
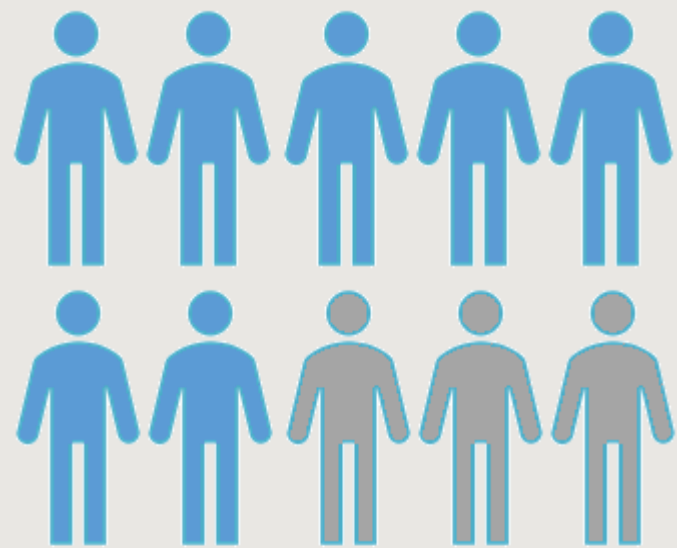
70.0% of survey respondents visited the destination post-use of the website

Destination Trip Details

50.3% were on a **vacation**
7.8% were on a **weekend getaway**

On average, out-of-state visitors spent **5.6 days** & **5.0 nights** in the destination

The average visiting travel party spent **$416.16** in-market, per day

61.0% stayed overnight in a hotel, motel or inn in the destination

Likelihood to Recommend a State Tourism Office Website

Out-of-state website users who visited rated their likelihood to recommend the website to others planning a trip to the destination an **8.5** on average using a 10-point scale

Website Influence on Destination Decision and Length of Stay

64.7% Said the website **influenced their decision to visit the destination**

54.6% Of those influenced by the website to visit said the website was **"Important"** or **"Very important"** to their decision

68.8% Of those who stated that the website influenced the number of days they spent in market reported that it **increased their length of stay**

These out-of-state visitors increased their length of stay by an average of **2.1 days**

Out-of-State Website ROI

$57.03

per real, new website user

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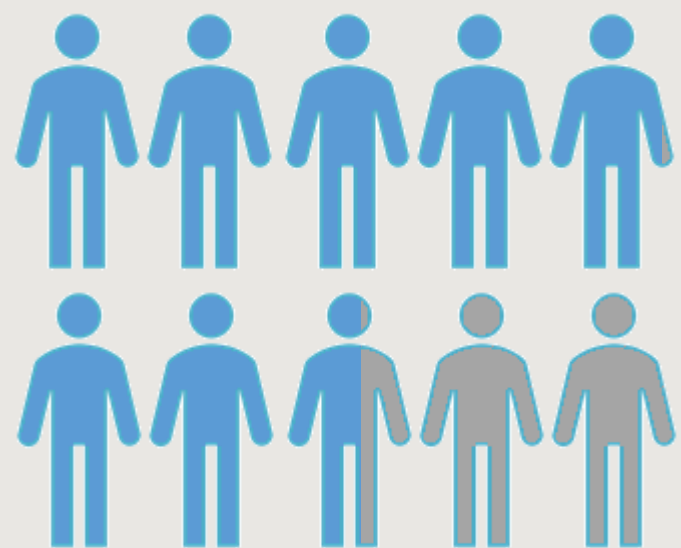# STO WEBSITE USER IN-STATE KEY FINDINGS

Potential Visitors

42.3% Of in-state website users were **potential visitors** who used the website to plan a trip to the destination

68.2% Of in-state potential visitors were **subject to influence by the website in making the destination decision** ("Interested" and "Considering")

Visitation within the Destination

75.7% of survey respondents traveled within the destination post-use of the website

Destination Trip Details

31.9% were on a **weekend getaway**
17.6% were on a **vacation**

On average, in-state visitors spent **3.6 days** & **2.8 nights** within the destination

The average visiting travel party spent **$351.08** in-market, per day

47.3% stayed overnight in a hotel, motel or bed & breakfast in the destination

Likelihood to Recommend a State Tourism Office Website

In-state website users who traveled within the destination rated their likelihood to recommend the website to others planning a trip to the destination an **8.5** on average using a 10-point scale

Website Influence on Destination Decision and Length of Stay

67.7% Said the website **influenced their decision to travel within the destination**

60.6% Of those influenced by the website to travel within the destination said the website was **"Important"** or **"Very important"** to their decision

57.4% Of those who stated that the website influenced the number of days they spent in market reported that it **increased their length of stay**

These out-of-state visitors increased their length of stay by an average of **2.1 days**

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STATE TOURISM OFFICE
WEBSITE USER PROFILE

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State Tourism Office Website Users—Key Definitions

The following terms are used within this section and defined below:

Average state website user –

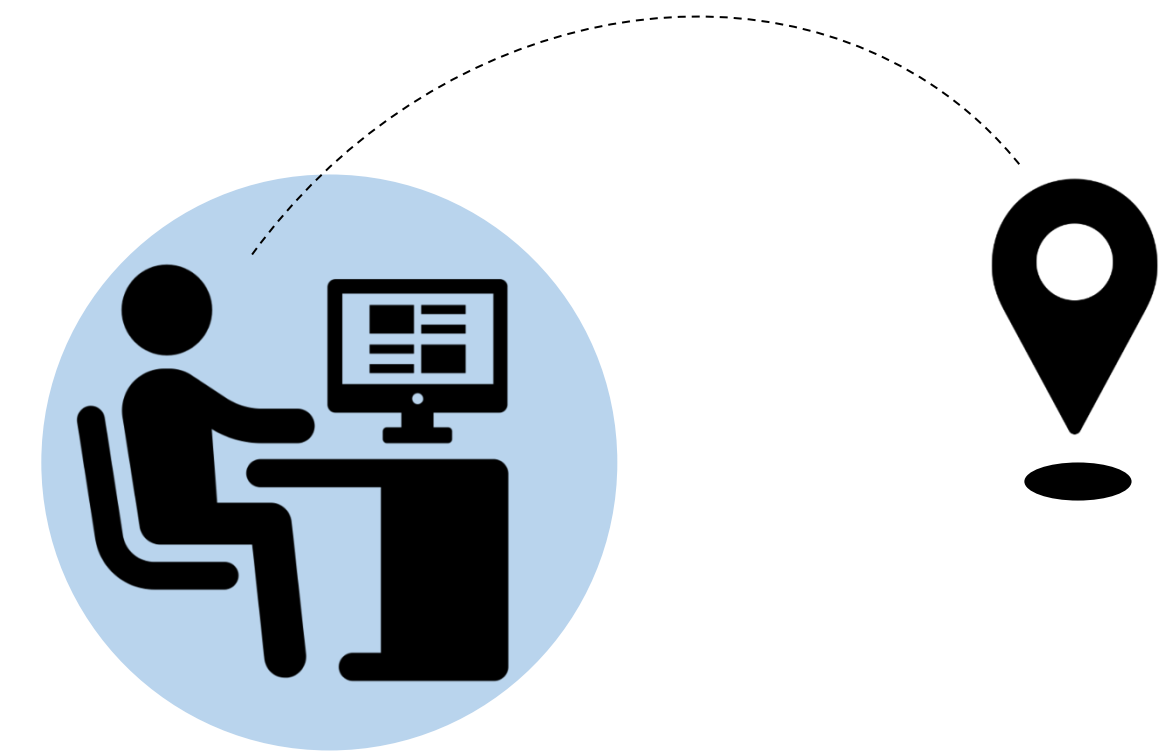Aggregate data from website users surveyed on all participating STO websites.

In-state website user –

Average Website User Intercept Survey respondent who resides within the participating states.

Out-of-state website user –

Average Website User Intercept Survey respondent who resides outside the participating states.

Residence

Nearly three-quarters of STO website users live outside the website they were visiting. The chart on the right illustrates the percentage of website users surveyed who live inside the states being studied and those who live outside the state. Nearly three-quarters were out-of-state residents (72.0%), an important distinction, as only spending in the state by non-residents is potentially counted in the website's ROI estimates. Nearly 30 percent of website users surveyed were in-state residents (28.0%).

Residence
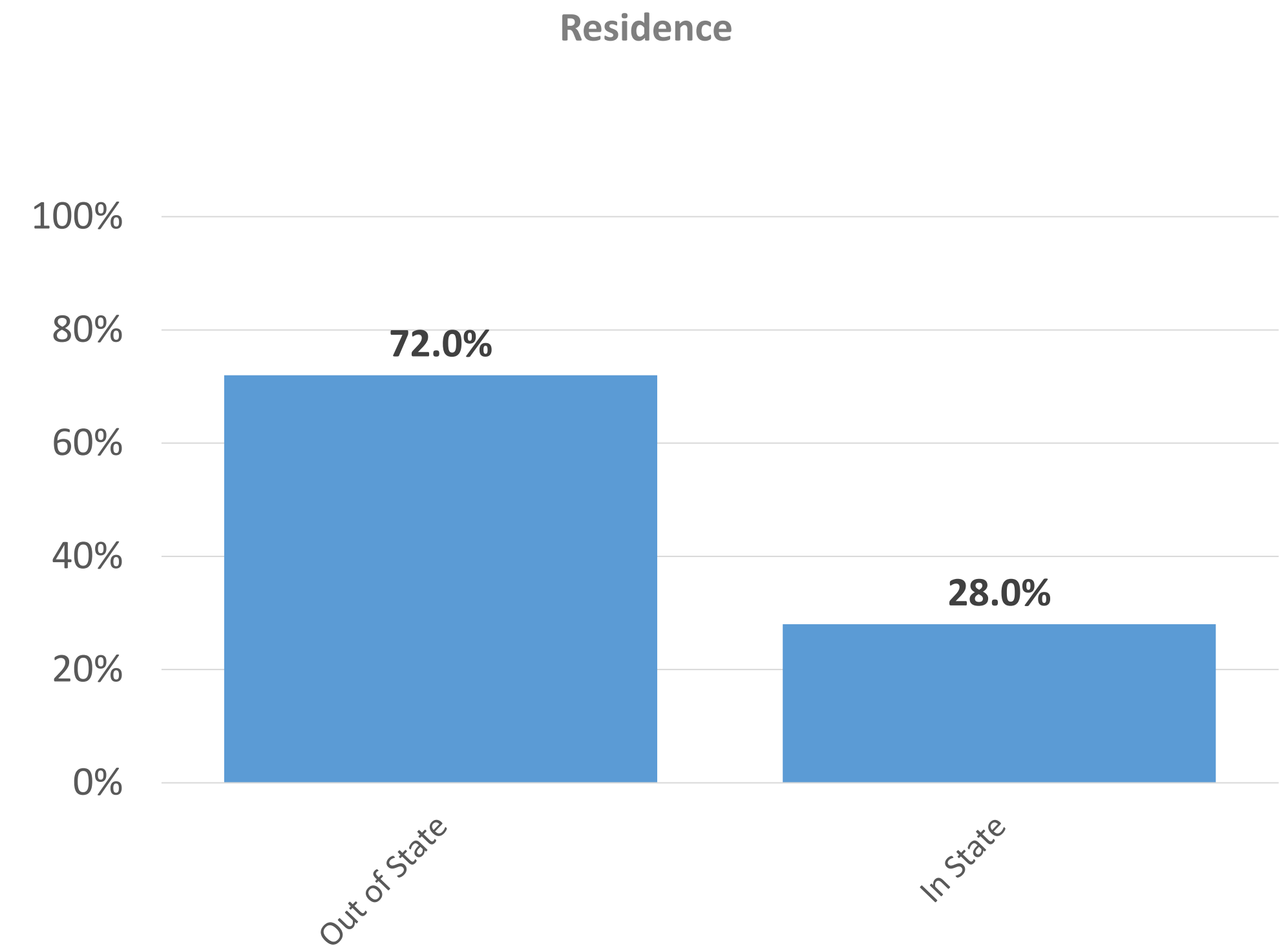
Question: Do you currently live in [STATE]?
Base: All respondents; 412,150 responses.

Type of Site User

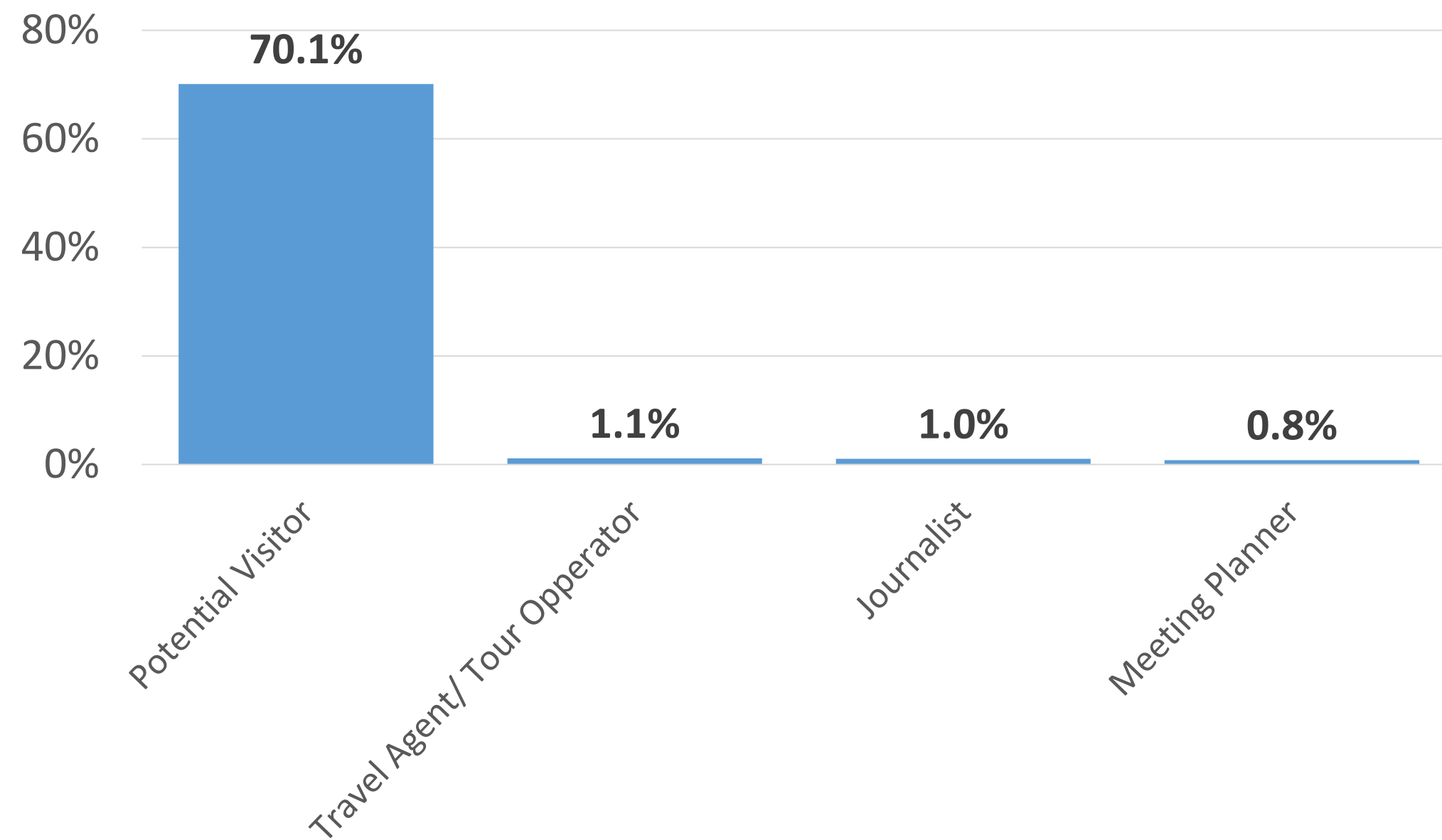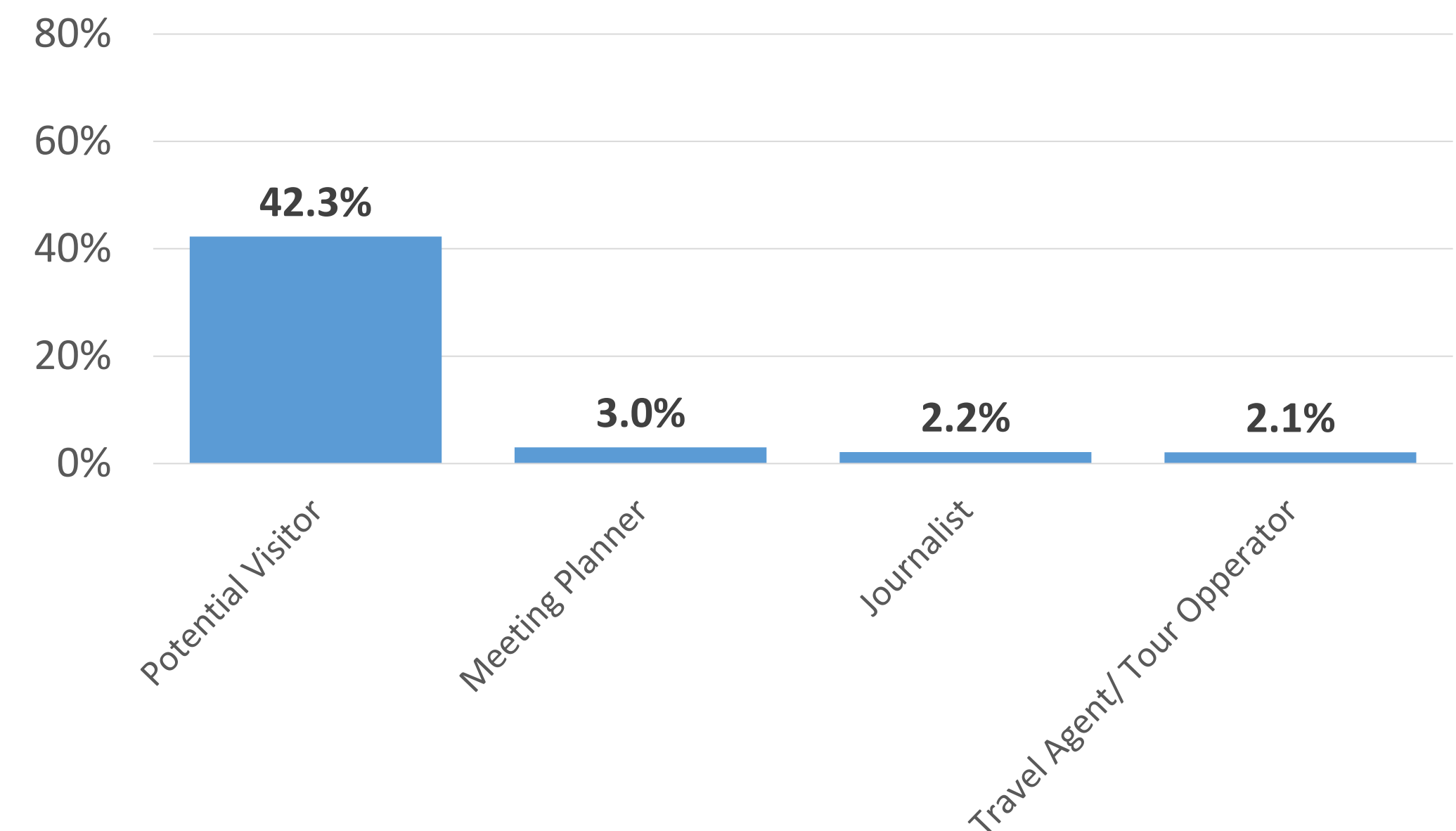While STO websites attract and serve a diverse audience, over two-thirds of out-of-state website users reported being potential visitors gathering travel-related information about their respective destination (70.1%) compared to four-in-ten in-state website users (42.3%). One of the first questions asked in the Website User Intercept Survey identified the user's reason for visiting the website. The charts below show the percentage of each type of website user surveyed on all participating STO websites separated by out-of-state and in-state residents.

Type of Site User – Out-of-state

Category	Percentage
Potential Visitor	70.1%
Travel Agent/ Tour Opperator	1.1%
Journalist	1.0%
Meeting Planner	0.8%

Question: Which of the following best describes you? (Select one)
Base: All out-of-state respondents planning a trip; 258,379 responses.

Type of Site User – In-state

| Category	Percentage
Potential Visitor	42.3%
Meeting Planner	3.0%
Journalist	2.2%
Travel Agent/ Tour Opperator	2.1%

Question: Which of the following best describes you? (Select one)
Base: All in-state respondents planning a trip; 126,147 responses.

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Point in Travel Planning Process

Over 40 percent of out-of-state website users gathering trip information on an STO website could potentially be converted by the website in making the decision to visit their state destination (43.7%). The remainder of these out-of-state users had already made up their mind to visit the destination when they used the website (54.4%).

Mobile users were more likely to be influenced by the website in making the ultimate decision to visit a state. Approximately two-thirds of in-state mobile users were "interested" or "considering" travel, and therefore potentially convertible by an STO website into a visitor (68.2% mobile vs. 43.7% desktop).

Point in Travel Planning Process – Out-of-state

54.4% Decided
30.3% Interested
13.3% Considering
2.0% Other

43.7% Subject to influence in making the destination decision
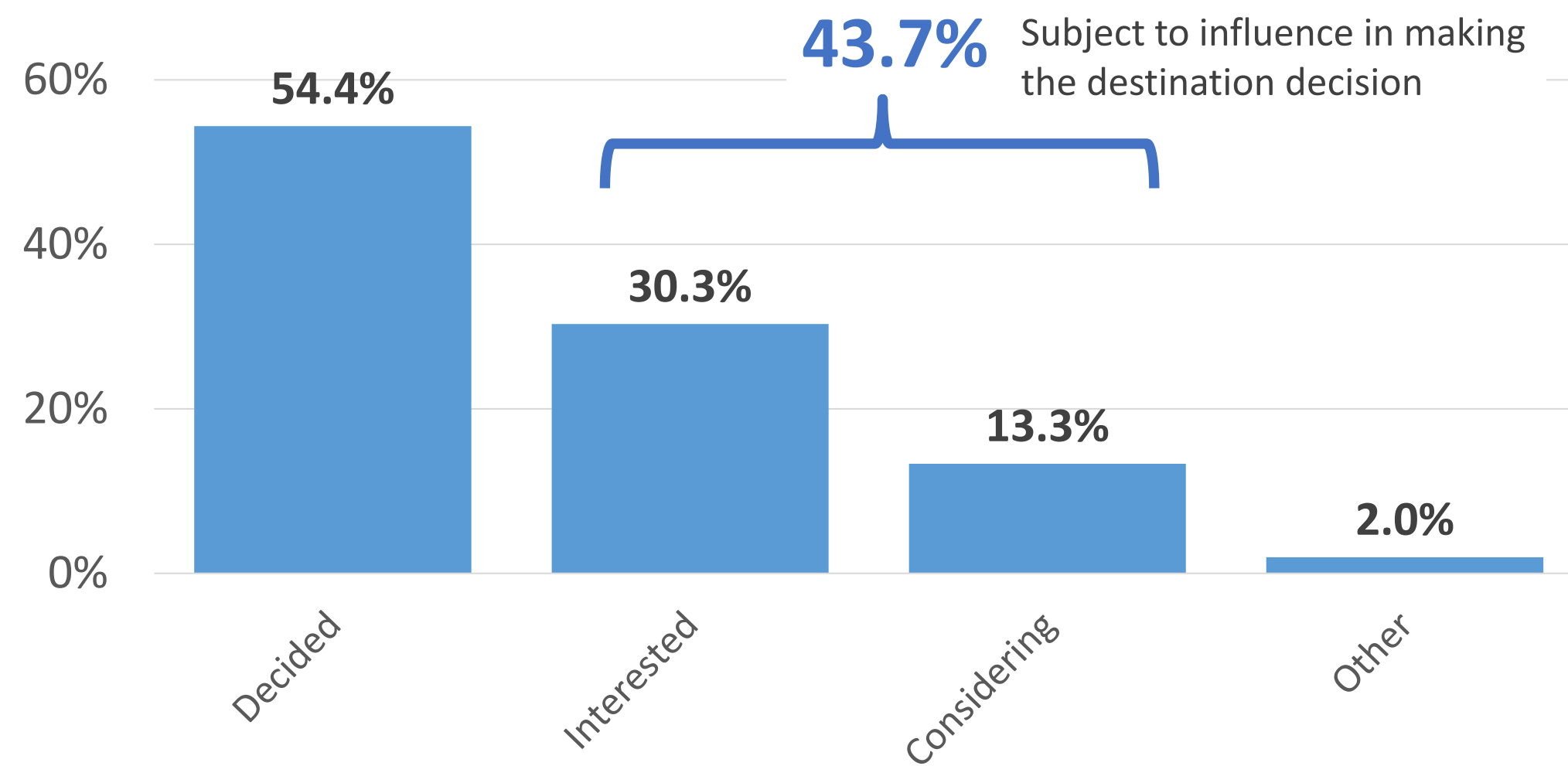
Question: Which best describes where you are in the trip planning process?
Base: All out-of-state respondents gathering information for a trip; 192,739 responses.

Point in Travel Planning Process – In-state

31.0% Decided
35.6% Interested
32.6% Considering
0.8% Other

68.2% Subject to influence in making the destination decision
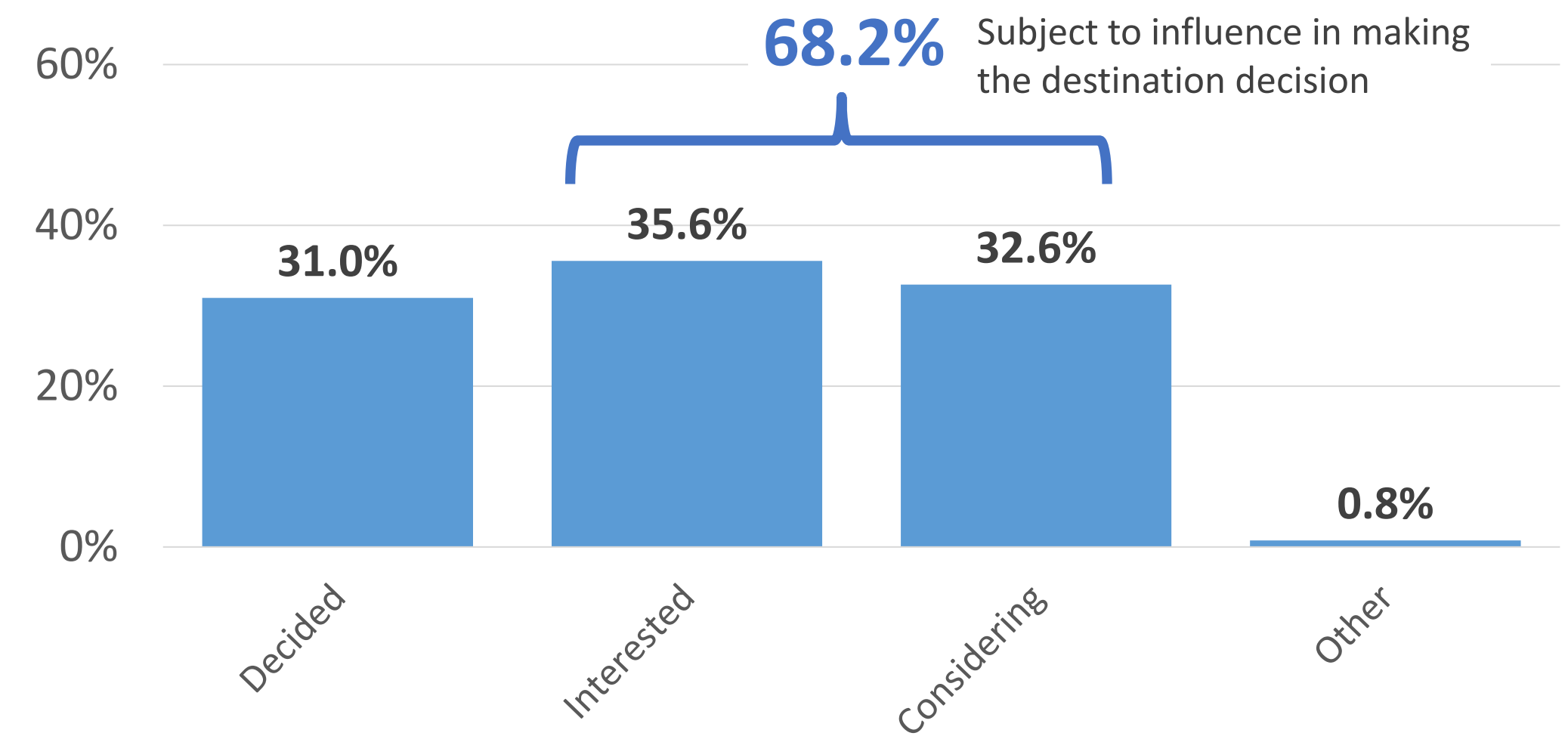
Question: Which best describes where you are in the trip planning process?
Base: All in-state respondents gathering information for a trip; 49,517 responses.

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Intended Type of Trip

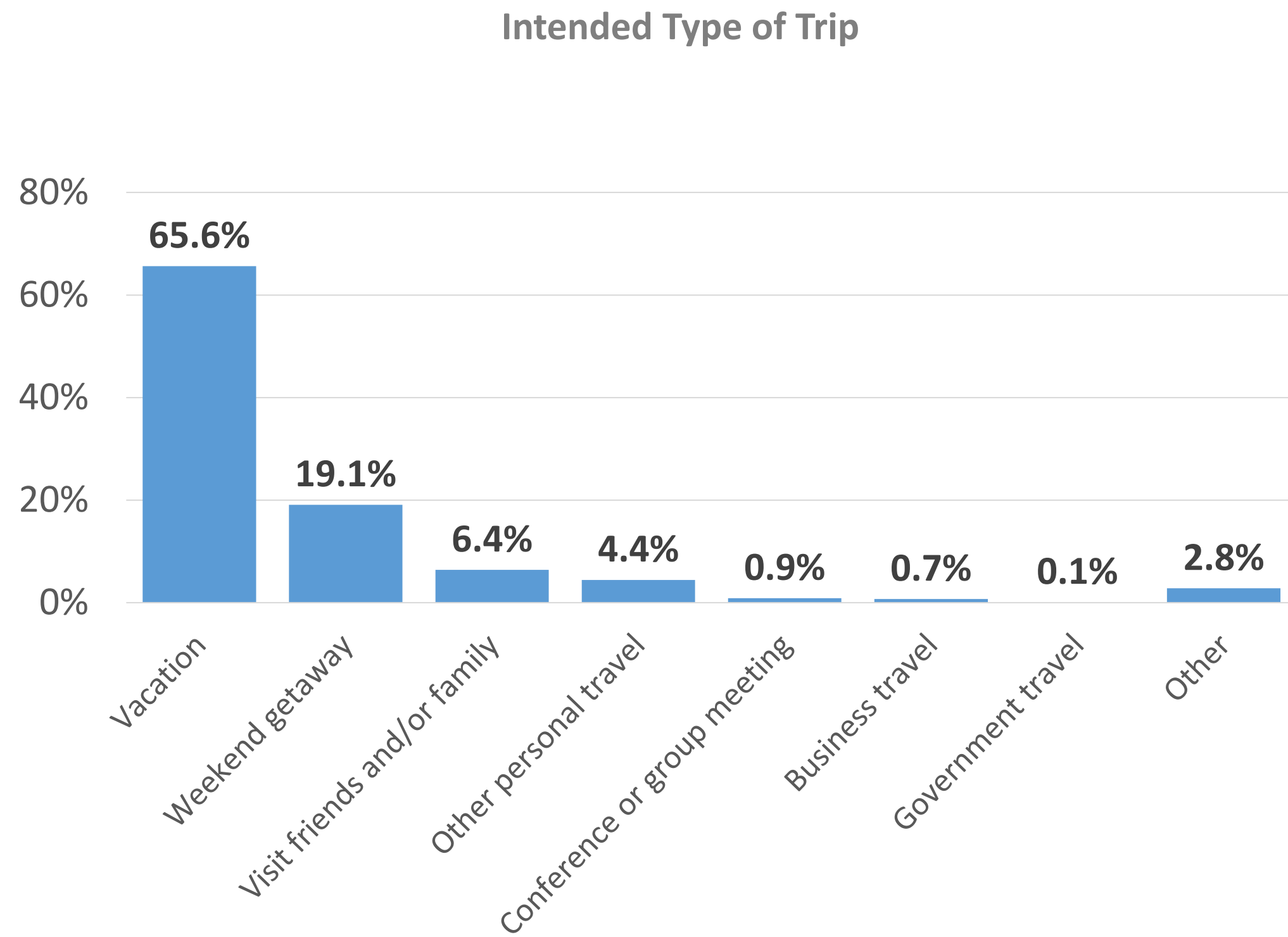**The majority of website users gathering information for a trip were planning leisure travel (84.7%).** In total, 65.6 percent planned to take a vacation and 19.1 percent intended to take a weekend getaway. On average, these website users planned to spend 4.9 days in the state they intended to travel to on their trip.

Intended Type of Trip

Vacation — 65.6%
Weekend getaway — 19.1%
Visit friends and/or family — 6.4%
Other personal travel — 4.4%
Conference or group meeting — 0.9%
Business travel — 0.7%
Government travel — 0.1%
Other — 2.8%

Intended Length of Trip

4.9 Days

Question: Which best describes the type of travel to [STATE] you are planning or considering? (Select one)   Base: All respondents gathering information for a trip; 242,043 responses.
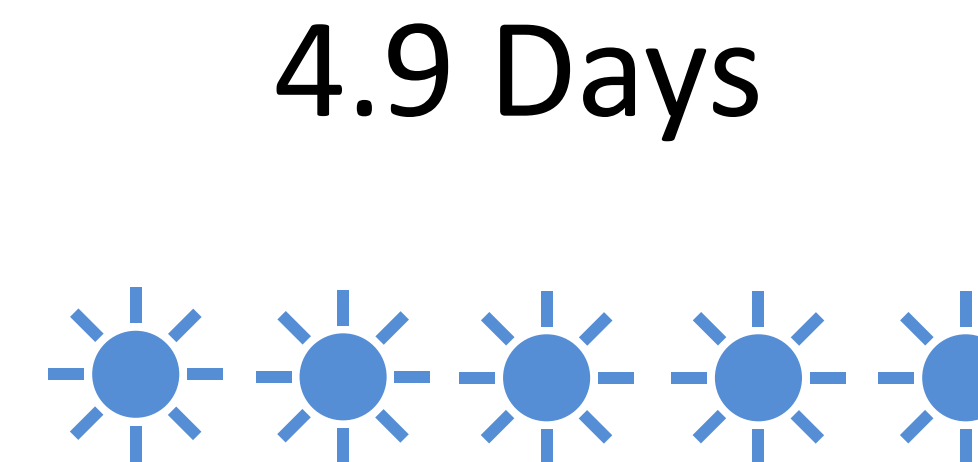
Question: How many days are you likely to stay in [STATE] on this planned or potential trip? Base: All respondents gathering information for a trip; 242,043 responses.

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Travel Planning Tasks Completed & Primary Objective of Website Visit

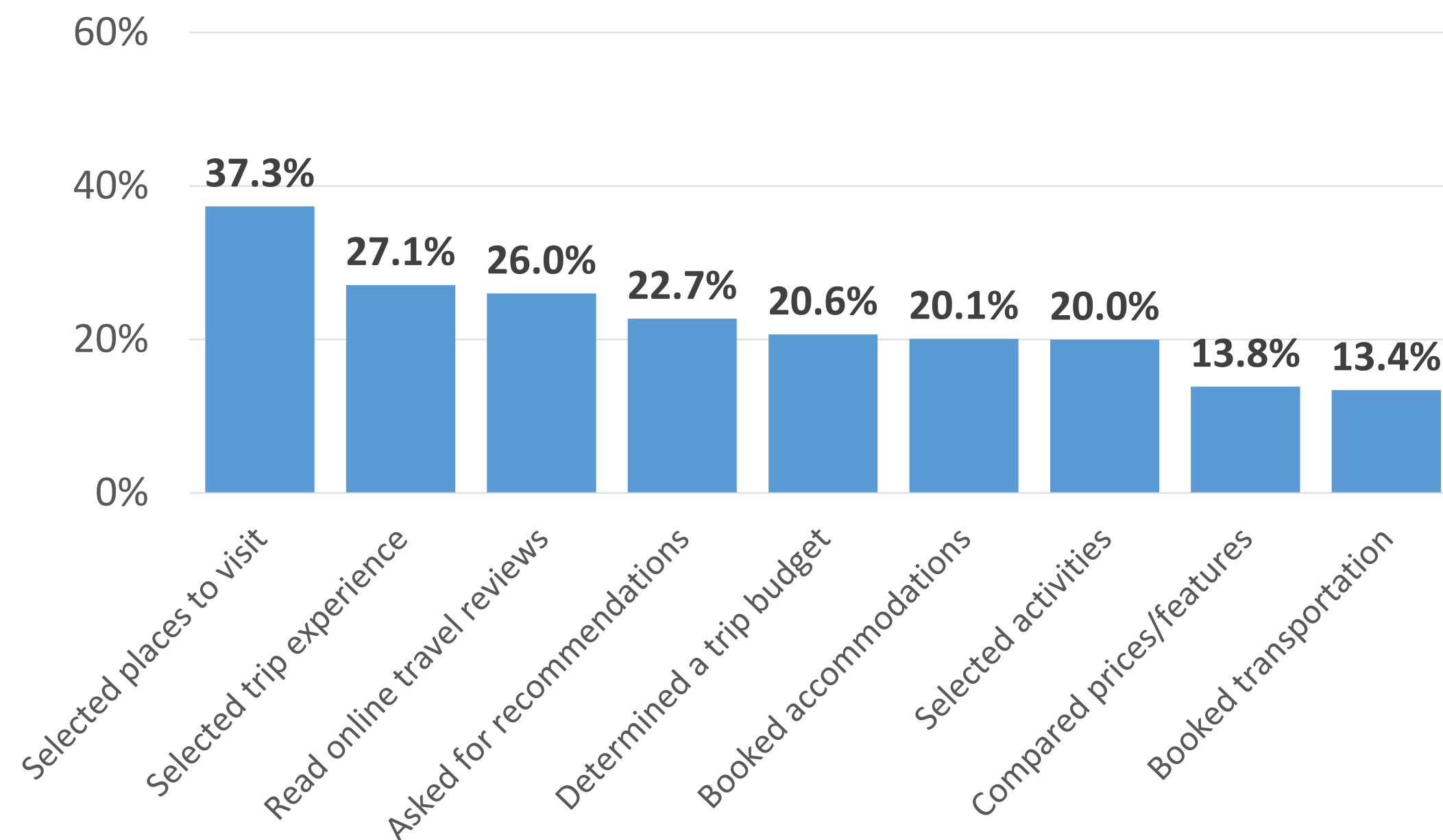**Over three-quarters of STO website users have already selected places to visit on their trip (37.3%).** Other travel planning tasks completed—reported by 20 percent or more potential visitors—were selecting the type of trip experiences (27.1%), reading online travel reviews (26.0%), asking for recommendations/advice (22.7%), determining a trip budget (20.6%), booking accommodations (20.1%) and selecting activities (20.0%).

The primary objective of using the state website was to gather information on specific places to go and things to do (46.5%). This was followed by one-third who were searching for inspiration/travel ideas (33.3%) and one-fifth who were using the website to compare features of places to go and/or things to do for their trip itinerary (20.2%).

Travel Planning Tasks Completed

Primary Objective of Website Visit

Searching for inspiration, 33.3%

Gathering information, 46.5%

Comparing the features, 20.2%
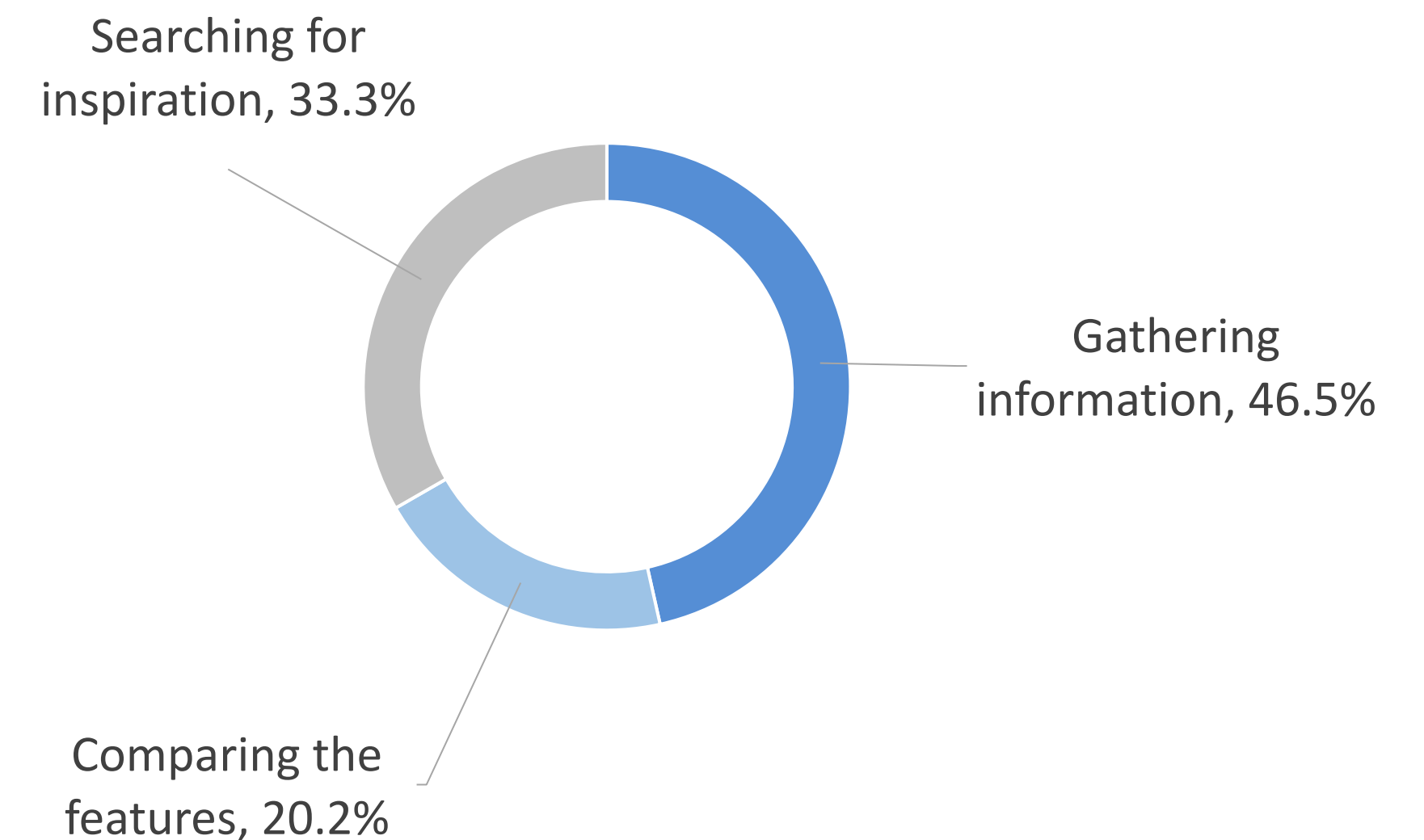
Question: Which of the following have you already done for this planned or potential trip? (Select all that apply) Base: All respondents gathering information for a trip; 242,043 responses.
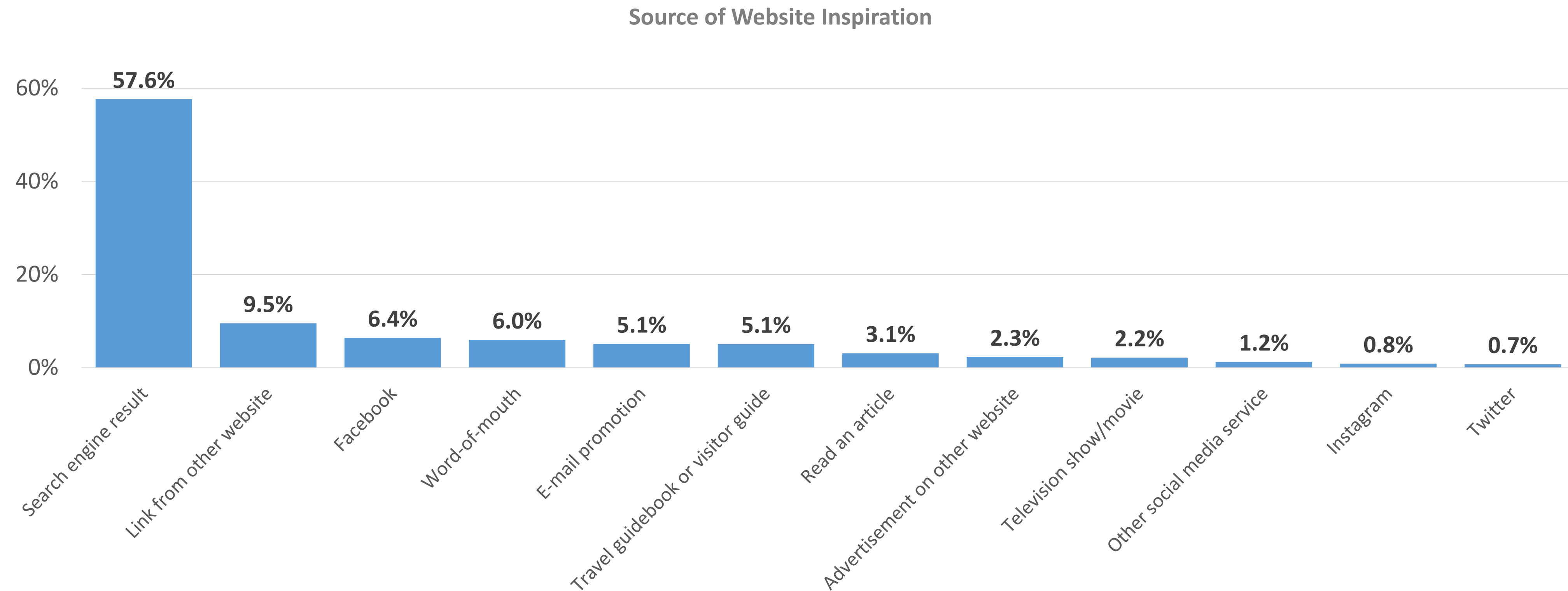
Question: Which best describes your primary objective for using our website? (Select one) Base: All respondents gathering information for a trip; 242,043 responses.

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Source of Website Inspiration

Website users were inspired to visit a state tourism website through a variety of sources. The primarily source for inspiring STO website users to visit a state website was a search engine result (57.6%). Additionally, 9.5 percent were inspired to visit the website via a link from another website, 6.4 percent were influenced to visit the website through Facebook and another 6.0 percent shared that word-of-mouth inspired a visit to a STO website.

Source of Website Inspiration

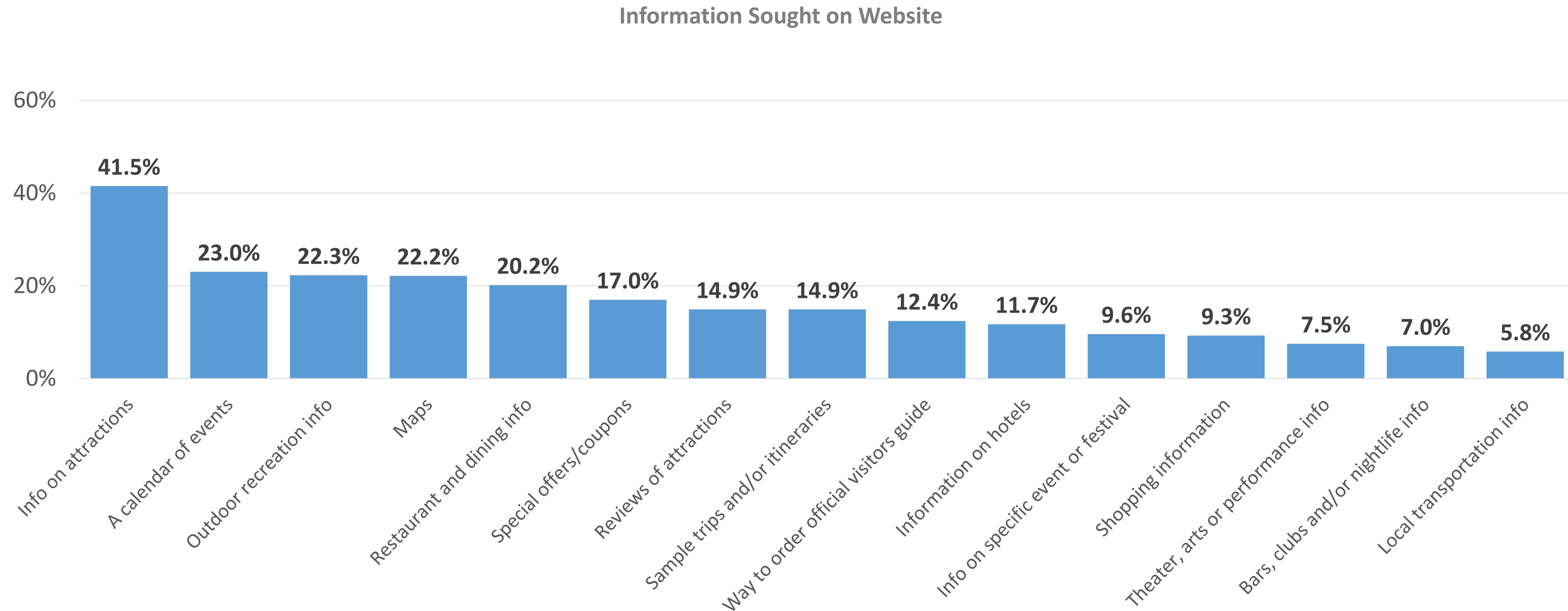| Source	Percentage
Search engine result	57.6%
Link from other website	9.5%
Facebook	6.4%
Word-of-mouth	6.0%
E-mail promotion	5.1%
Travel guidebook or visitor guide	5.1%
Read an article	3.1%
Advertisement on other website	2.3%
Television show/movie	2.2%
Other social media service	1.2%
Instagram	0.8%
Twitter	0.7%

Question: What initially inspired you to visit our website today? (Select one) Base: All respondents; 184,065 responses.
Question and answer choices not asked for every state website.

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Information Sought on Website

Website users were most commonly looking for information on attractions when they arrived at the STO website (41.5%). Additionally, 20 percent or more of these website users also sought a calendar of events (23.0%), outdoor recreation information (22.3%), maps (22.2%) and/or restaurant/dining information (20.2%).

Information Sought on Website

Category	Percentage
Info on attractions	41.5%
A calendar of events	23.0%
Outdoor recreation info	22.3%
Maps	22.2%
Restaurant and dining info	20.2%
Special offers/coupons	17.0%
Reviews of attractions	14.9%
Sample trips and/or itineraries	14.9%
Way to order official visitors guide	12.4%
Information on hotels	11.7%
Info on specific event or festival	9.6%
Shopping information	9.3%
Theater, arts or performance info	7.5%
Bars, clubs and/or nightlife info	7.0%
Local transportation info	5.8%

Question: Which types of information were you SPECIFICALLY LOOKING FOR when you arrived at this website?
(Please select only those items that you had in mind before arriving at this website.) Base: All respondents; 246,247 responses.
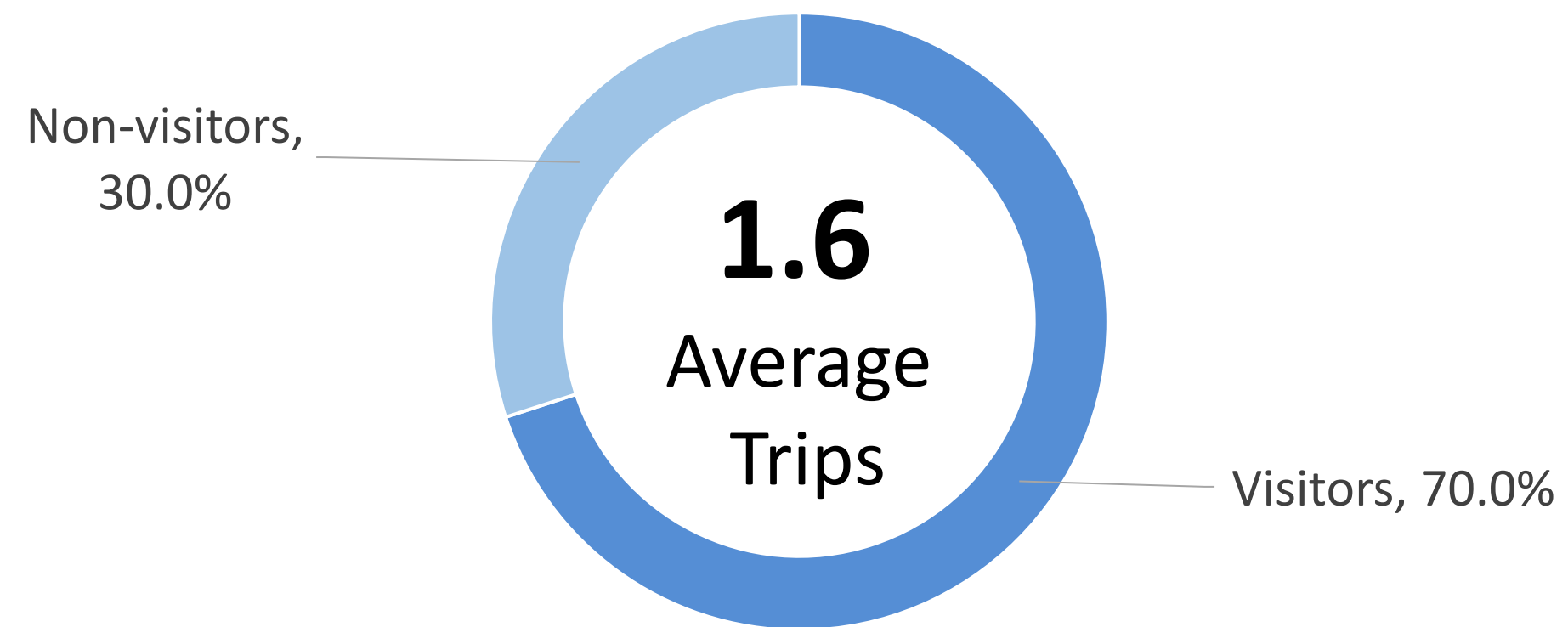*Question and answer choices not asked for every state website.*

PROFILE OF STATE TOURISM WEBSITE USERS WHO VISITED THE STATE

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# Visitation After Using State Destination Website

Approximately seven-in-ten website users surveyed after using a state tourism office website for trip research and/or planning purposes indeed visited the respective state (70.0% out-of-state and 75.7% in-state users). Out-of-state visitors took an average of 1.6 trips to the destination after using the website, while in-state visitors took 3.0 trips within the state after using the website.

Visitation After Using State Destination Website – Out-of-state

Non-visitors, 30.0%

1.6
Average Trips

Visitors, 70.0%

Visitation After Using State Destination Website – In-state
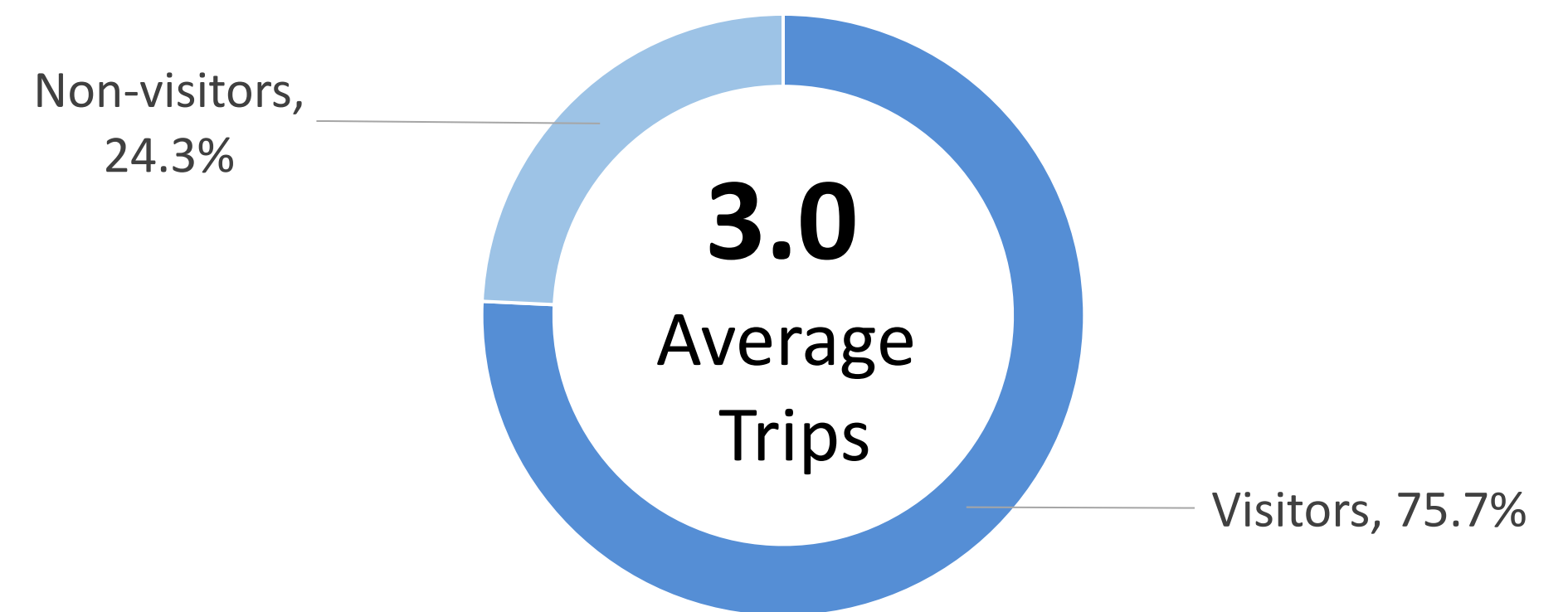
Non-visitors, 24.3%

3.0
Average Trips

Visitors, 75.7%

Question(s): Since visiting our website, how many trips to or within [STATE] have you made? (Select one) Base: All out-of-state respondents who used the website; 18,067 responses.
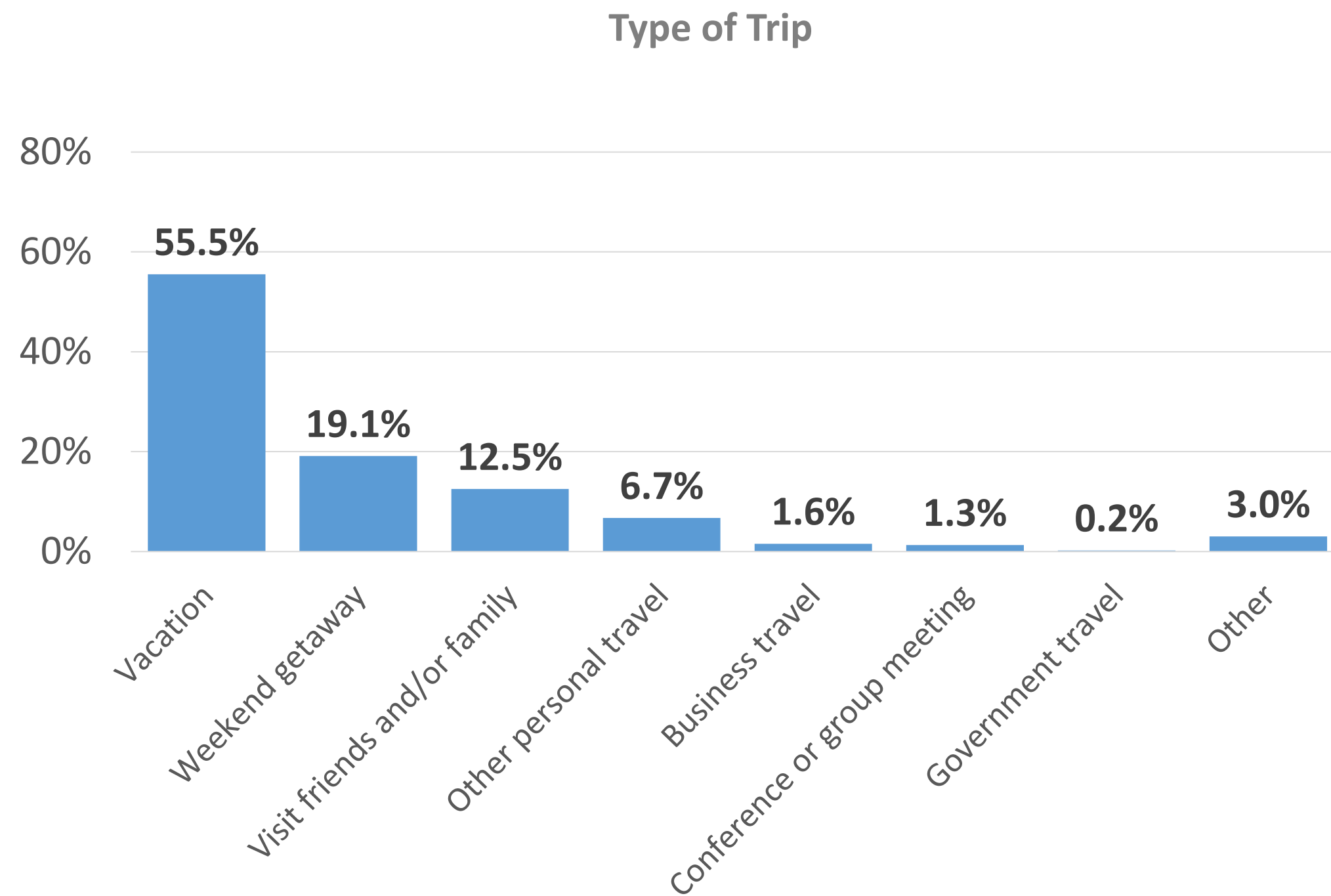
Question(s): Since visiting our website, how many trips to or within [STATE] have you made? (Select one) Base: All in-state respondents who used the website; 5,576 responses.

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Trip Type and Length of Stay

Leisure travel represents the crux of visitation amongst STO website users who took a trip to the state (74.6%). This includes 55.5 percent who took a vacation and 19.1 percent who took a weekend getaway trip after using the website. Website users who visited post-use of the website also traveled within the state to visit friends and/or family (12.5%).

Travelers visited an average of 3.9 cities/towns during their trip to/within the state. Travelers who visited the state after using the STO website spent an average of 5.1 days and 4.4 nights in the state. This was 0.2 more days than these website users intended to spend in the state when they were planning their trip (5.1 vs. 4.9).

Type of Trip

Cities/Towns Visited and Average Length of Stay

The average visitor spent
5.1 days and 4.4 nights

The average visitor visited
3.9 cities/towns

Question: Which of the following best describes the primary reason for your most recent trip to or within [STATE]? (Select one) Base: All respondents who visited after using the website; 15,806 responses.

Question(s): During your trip to or within [STATE], how many different cities/towns did you visit? Base: All out-of-state respondents who visited after using the website; How many total days and nights did you spend in [STATE] on this trip? Base: All respondents who visited after using the website; 15,806 responses.

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Place of Stay and Visitor Spending

The majority of website users who visited the respective state stayed in commercial lodging during their trip (57.4%). This highlights the STO website's significant potential to generate incremental room nights for in-state lodging businesses. Additionally, 17.4 percent of these visitors stayed overnight in a home rental within the state, while 7.8 percent were day-trip visitors only.
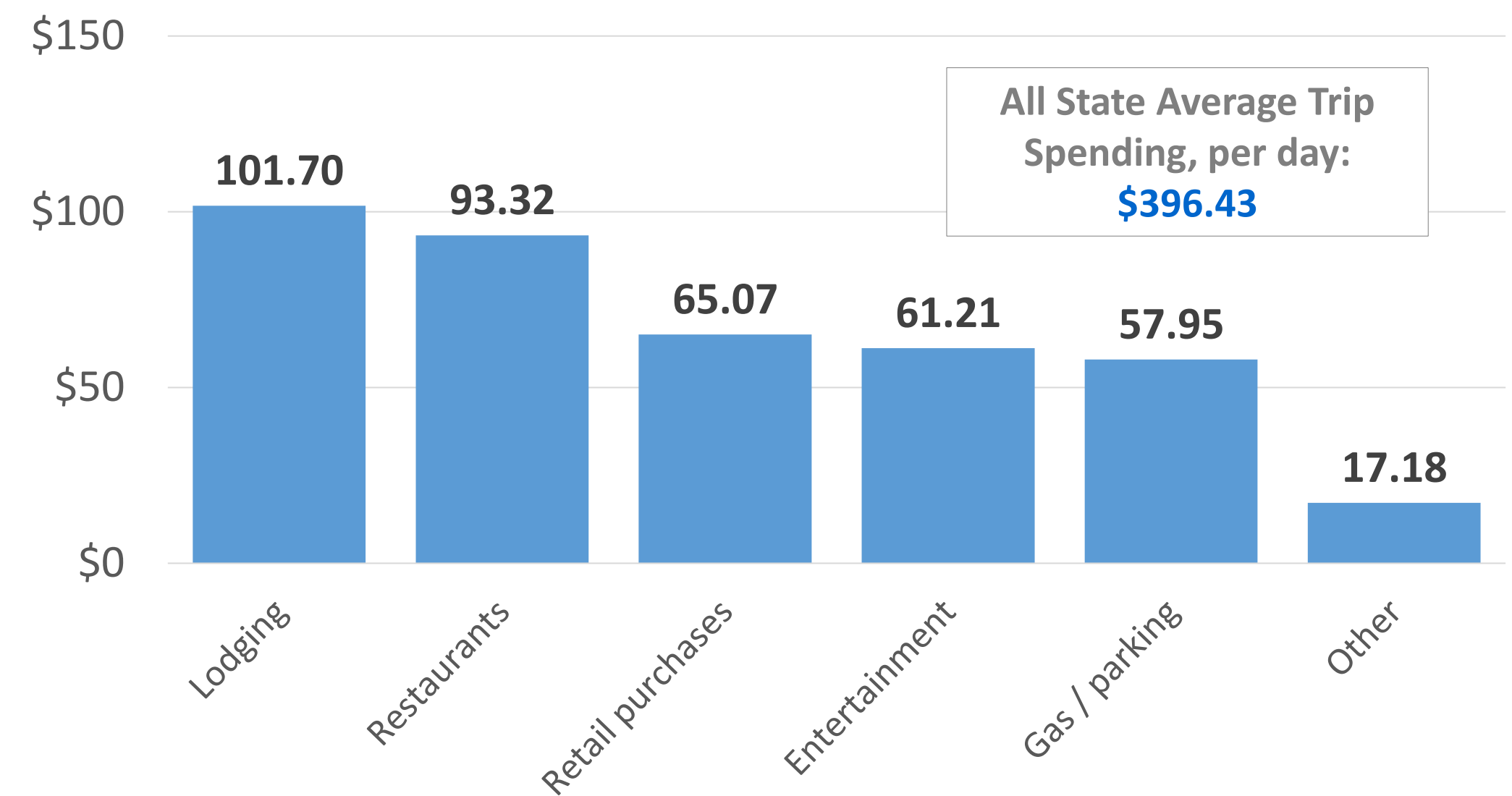
STO website users who visited the state destination reported an average in-market daily trip spending of $396.43. This trip spending typically covered 2.5 persons. Thus, it is estimated that each of these travelers represents $158.57 in daily spending within the state.

Place of Stay

- Hotel, motel or inn — 57.4%
- Home rental — 17.4%
- Private residence — 15.9%
- Other — 13.0%
- Day trip only — 7.8%
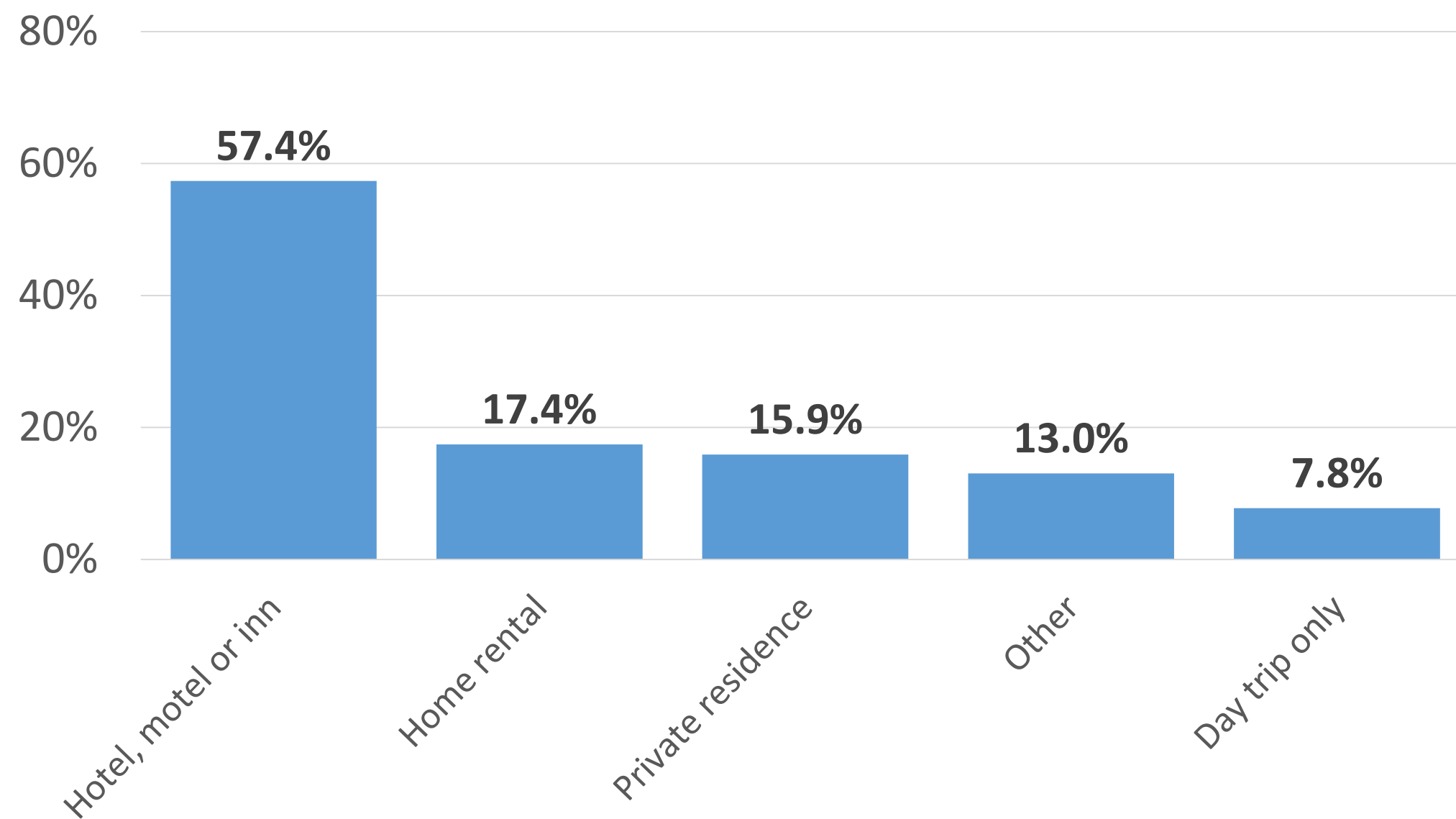
Question: While on this trip, where did you stay in [STATE]? (Select one) Base: All respondents who visited after using the website; 15,806 responses.

Spending Per Travel Party, Per Day

- Lodging — 101.70
- Restaurants — 93.32
- Retail purchases — 65.07
- Entertainment — 61.21
- Gas / parking — 57.95
- Other — 17.18

**All State Average Trip Spending, per day:** $396.43

Question: While on this trip, approximately how much IN TOTAL did you spend PER DAY while in [STATE] on each of the following? Please only INCLUDE spending inside [STATE] and EXCLUDE any spending made outside [STATE] or before arriving in [STATE]. Base: All respondents who visited after using the website; 15,479 responses.

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Official Travel Resources Used

STO website users commonly use other official marketing assets and resources provided by the State Tourism Office in their trip planning process. The most widely used of these was the official visitors guide—most typically in digital format (45.2%), but also significantly in print (38.0%). Another 13.3 percent of STO website users accessed STO Facebook content to plan their trip, followed by 8.0 percent who viewed YouTube video content while planning their trip.

Official Travel Resources Used
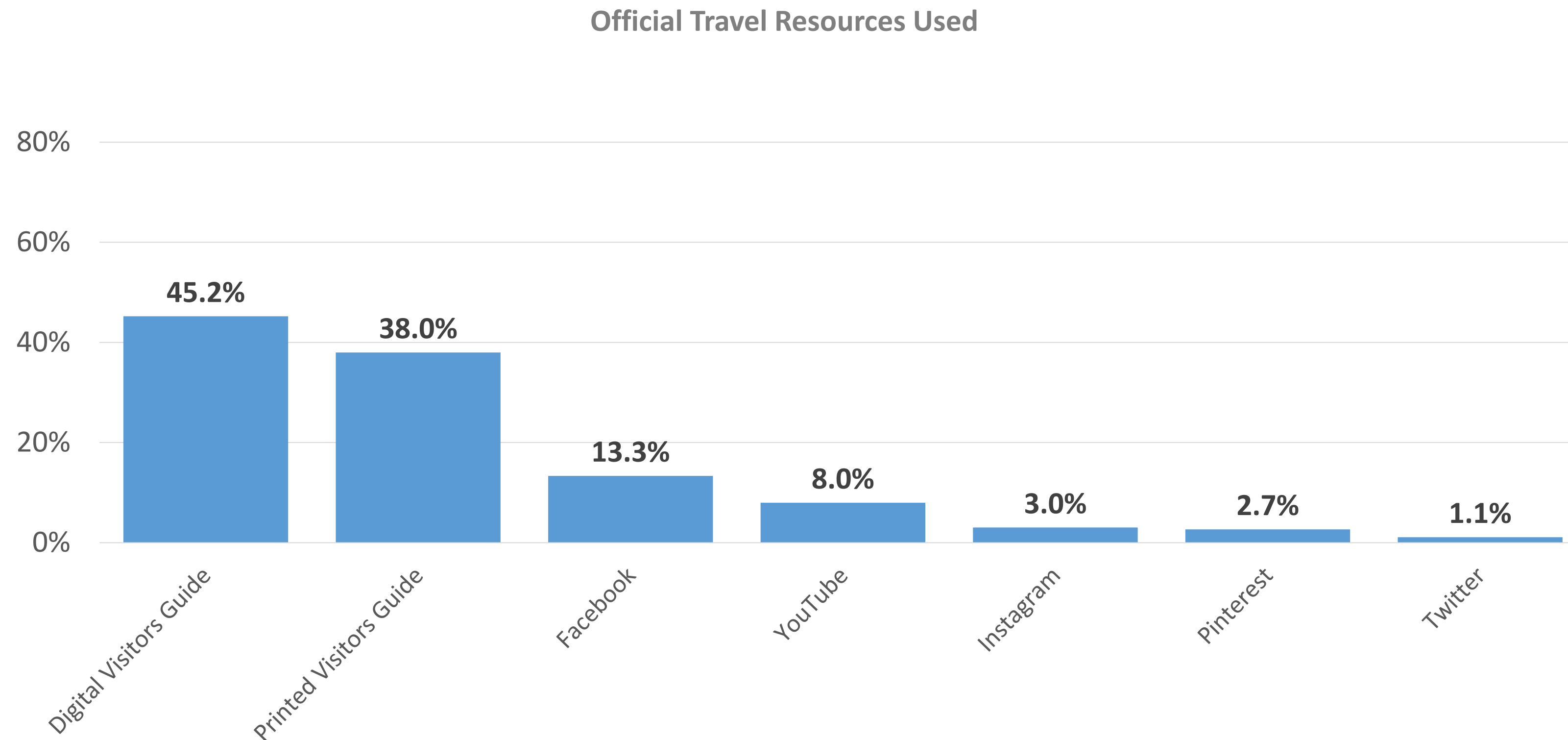
Question: Which of these other resources did you use to plan your trip to [STATE]? (Select all that apply)
Base: All respondents who visited after using the website; 15,798 responses.

Website User Destination Visitor Demographics

The following presents the demographic profile of website users who visited after using a state tourism office website.

Female – 60.9%

Male – 37.8%

Mean age – 53.5

Married/partnered – 75.6%
Single – 18.8%

Mean household income – $86,787

Children under 18 – 17.7%

College or graduate degree – 65.1%

Caucasian ethnicity – 83.0%
Non-Caucasian ethnicity – 11.3%
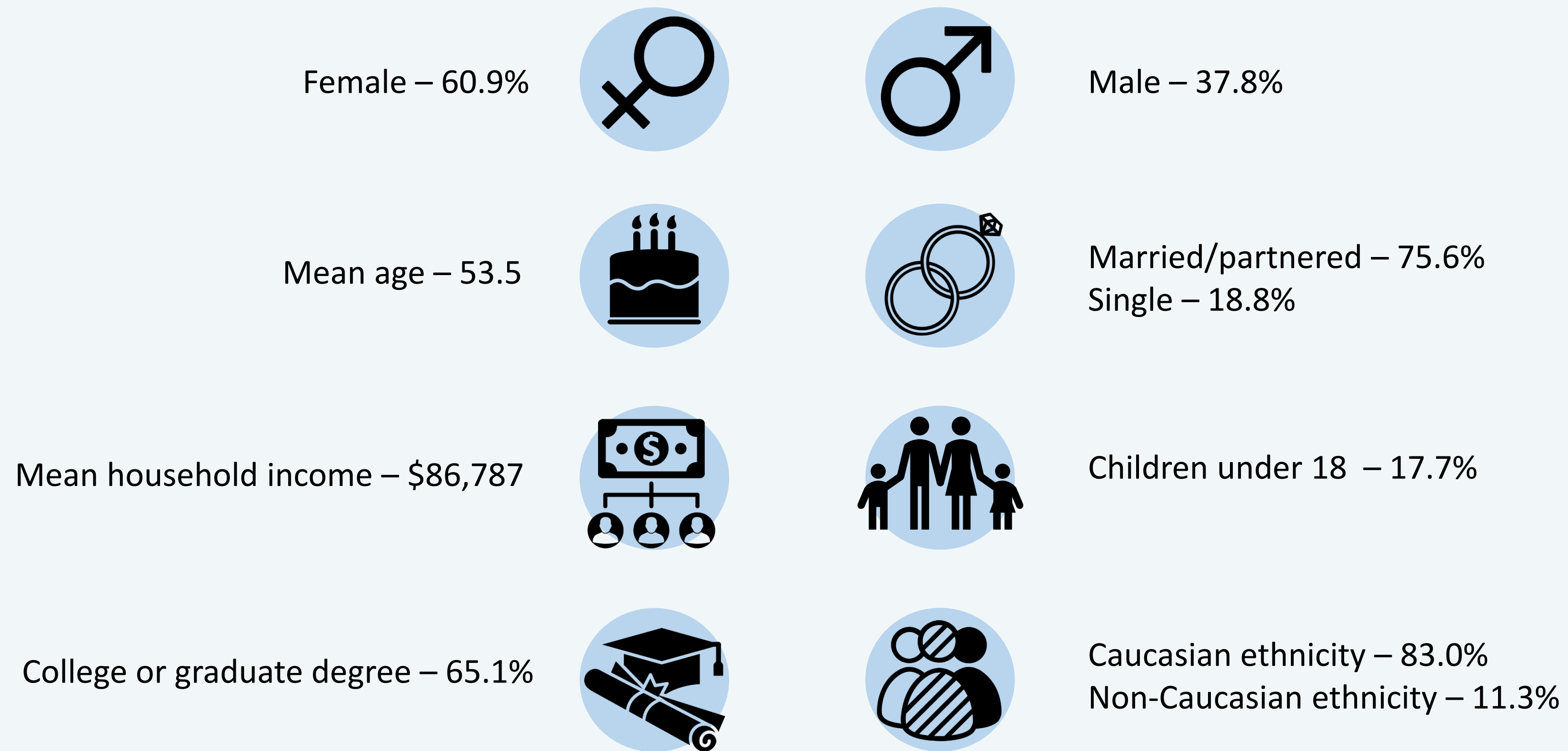
Base: All respondents who visited after using the website; 4,065 responses.

IMPACT OF STATE TOURISM OFFICE WEBSITES ON USERS WHO VISITED

Destination ◆ Analysts

Impact of Website on Destination Decision

STO websites effectively persuade its users to visit the destination. For out-of-state visitors who used the STO website to plan their trip, 64.7 percent agreed that the site indeed influenced them to visit the state. Of these out-of-state visitors who were influenced by the site, 54.6 percent reported that the site was "Important" or "Very important" to the destination decision. This distinction is significant because it identifies those visitors who are on an incremental trip, whose direct spending in the state was used in the website ROI estimates. For in-state visitors who used the STO website for trip planning, 69.0 percent said the site influenced them to travel within the state, with 60.6 percent who reported that the site was "Important" or "Very important" to the destination decision.
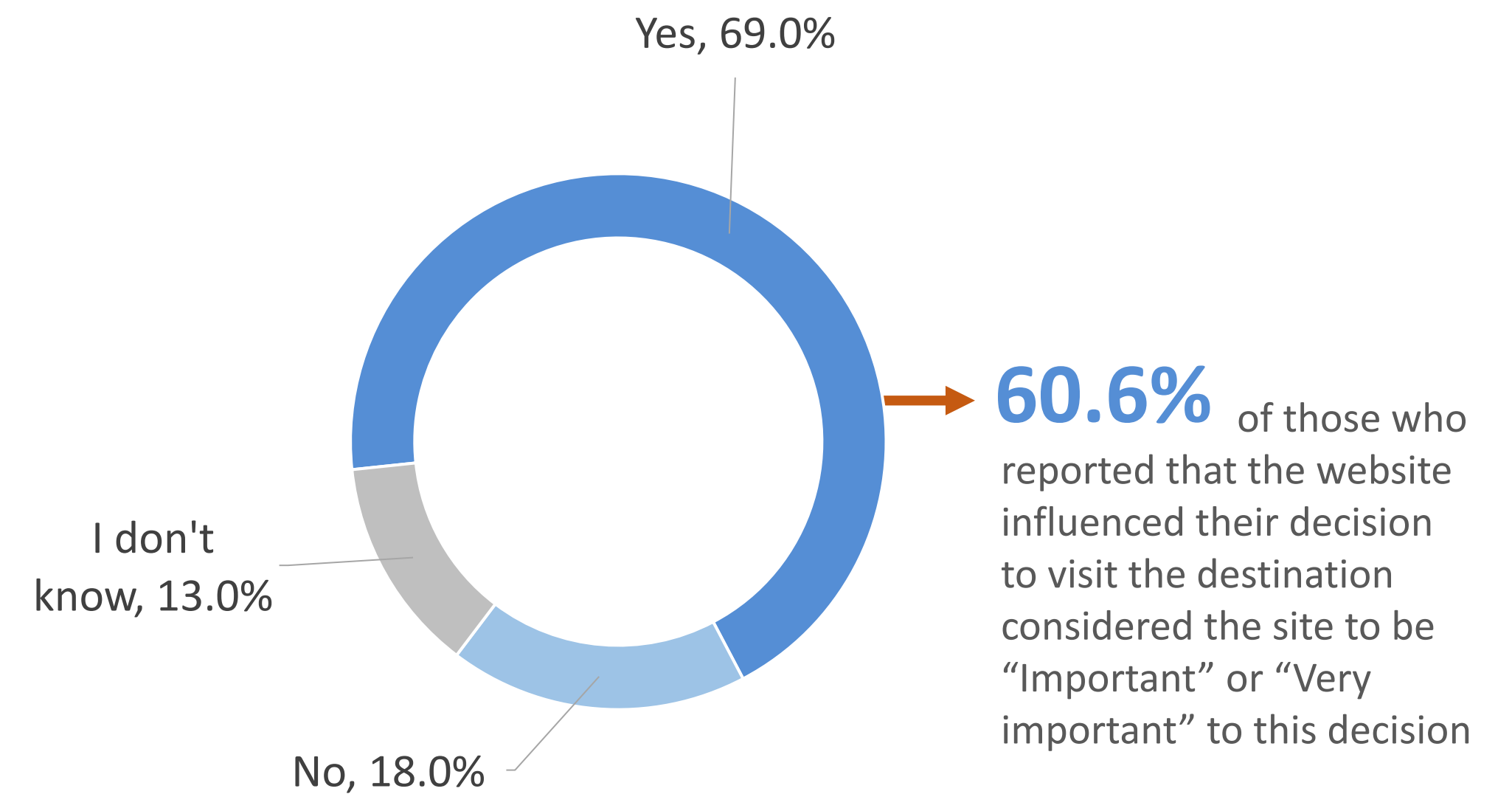
Note: Only spending in the state by non-residents is potentially counted in the website's ROI estimates

Impact of Website on Destination Decision – Out-of-state
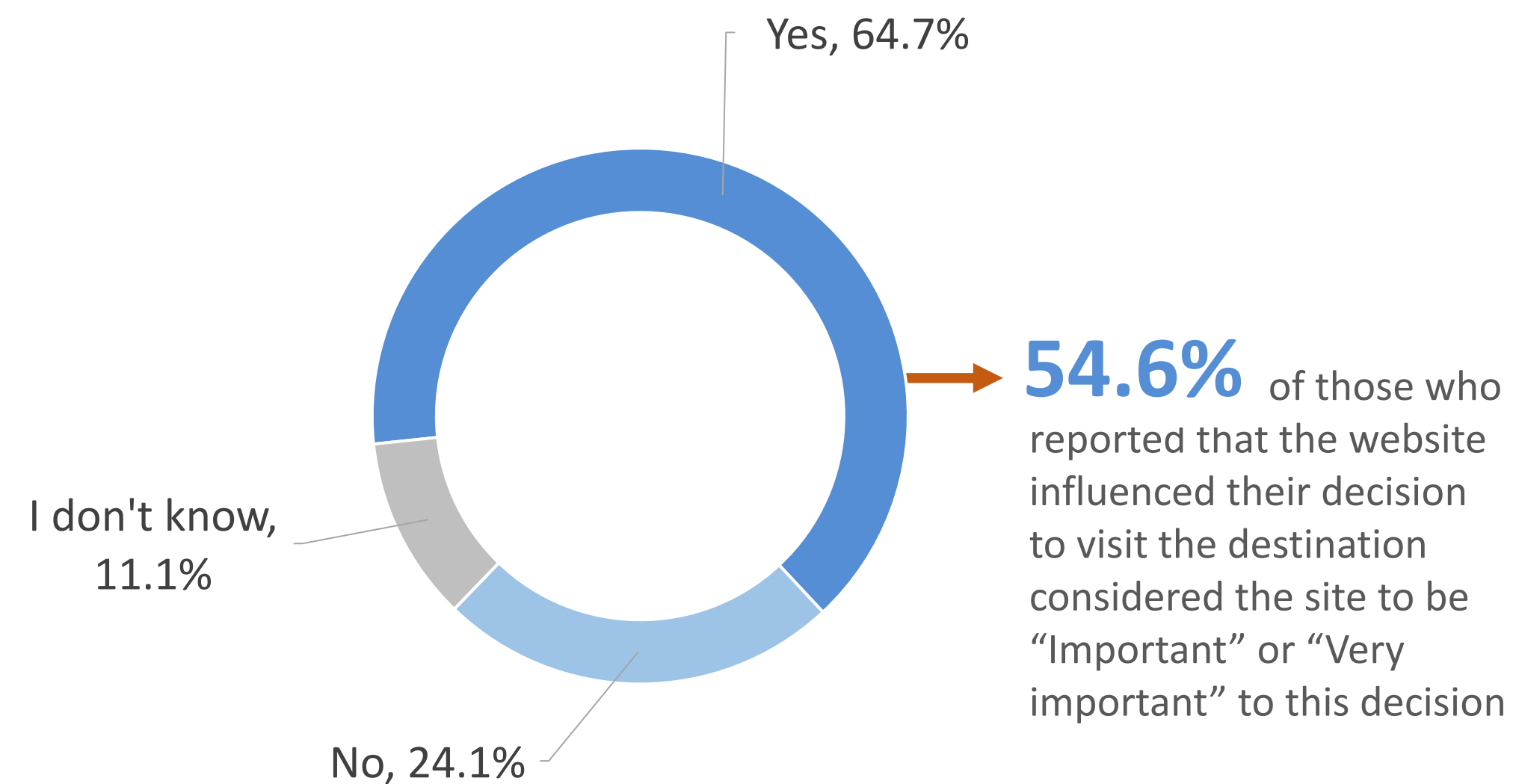
Yes, 64.7%

I don't know, 11.1%

No, 24.1%

54.6% of those who reported that the website influenced their decision to visit the destination considered the site to be "Important" or "Very important" to this decision

Question: Do you feel that our website helped you make your decision to take this trip to [STATE]?
Base: All out-of-state visitors who were potentially influenced by the website in the destination decision; 11,356 responses.

Impact of Website on Destination Decision – In-state

Yes, 69.0%

I don't know, 13.0%

No, 18.0%

60.6% of those who reported that the website influenced their decision to visit the destination considered the site to be "Important" or "Very important" to this decision
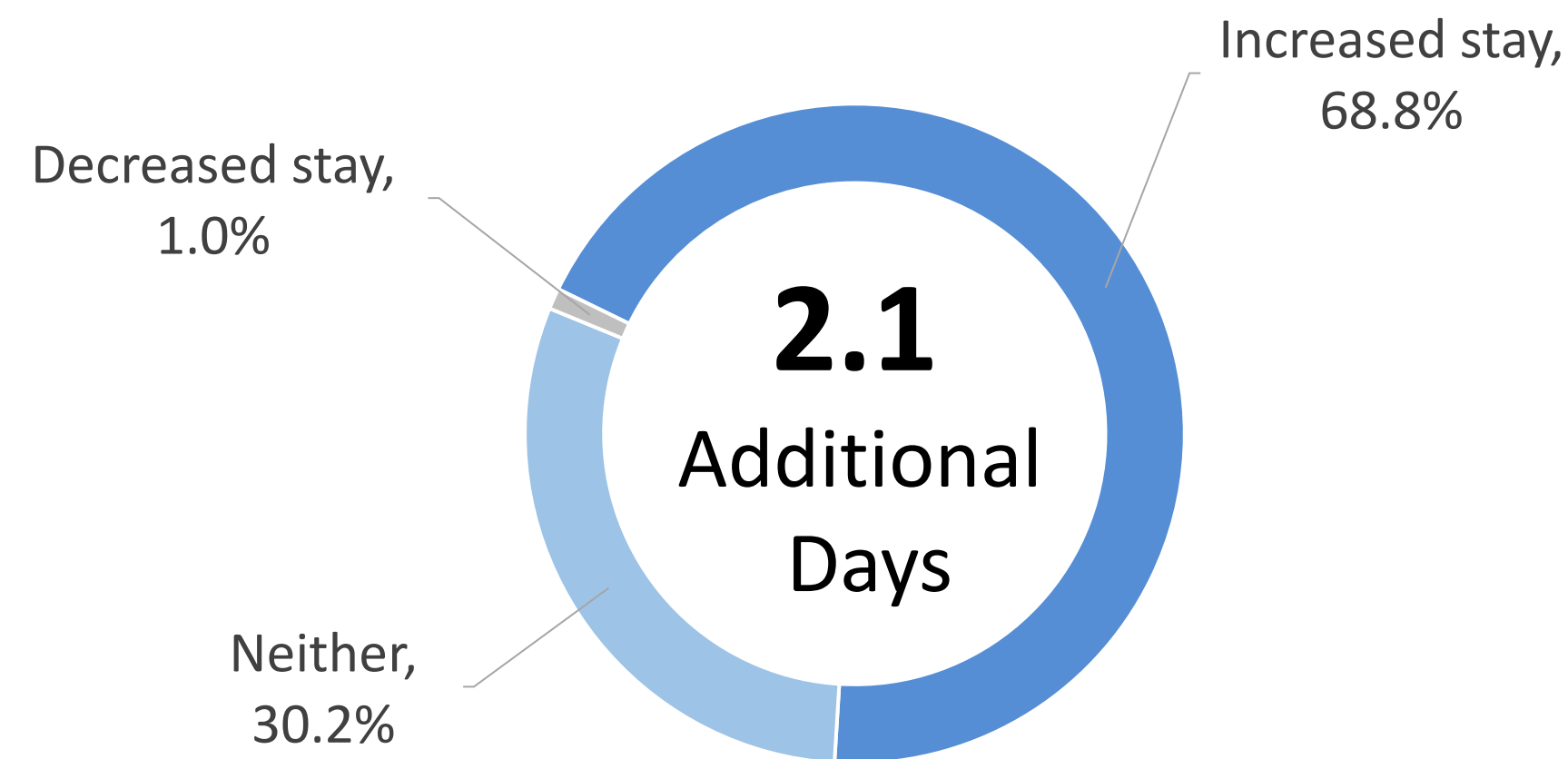
Question: Do you feel that our website helped you make your decision to take this trip to [STATE]?
Base: All in-state visitors who were potentially influenced by the website in the destination decision; 3,893 responses.

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Impact of Website on Length of Stay

Over two-thirds of out-of-state of STO website users who stated that the website influenced the number of days they spent in the state reported that it increased their length of stay (68.8%). These respondents increased the number of days spent in the state by an average of 2.1 days.
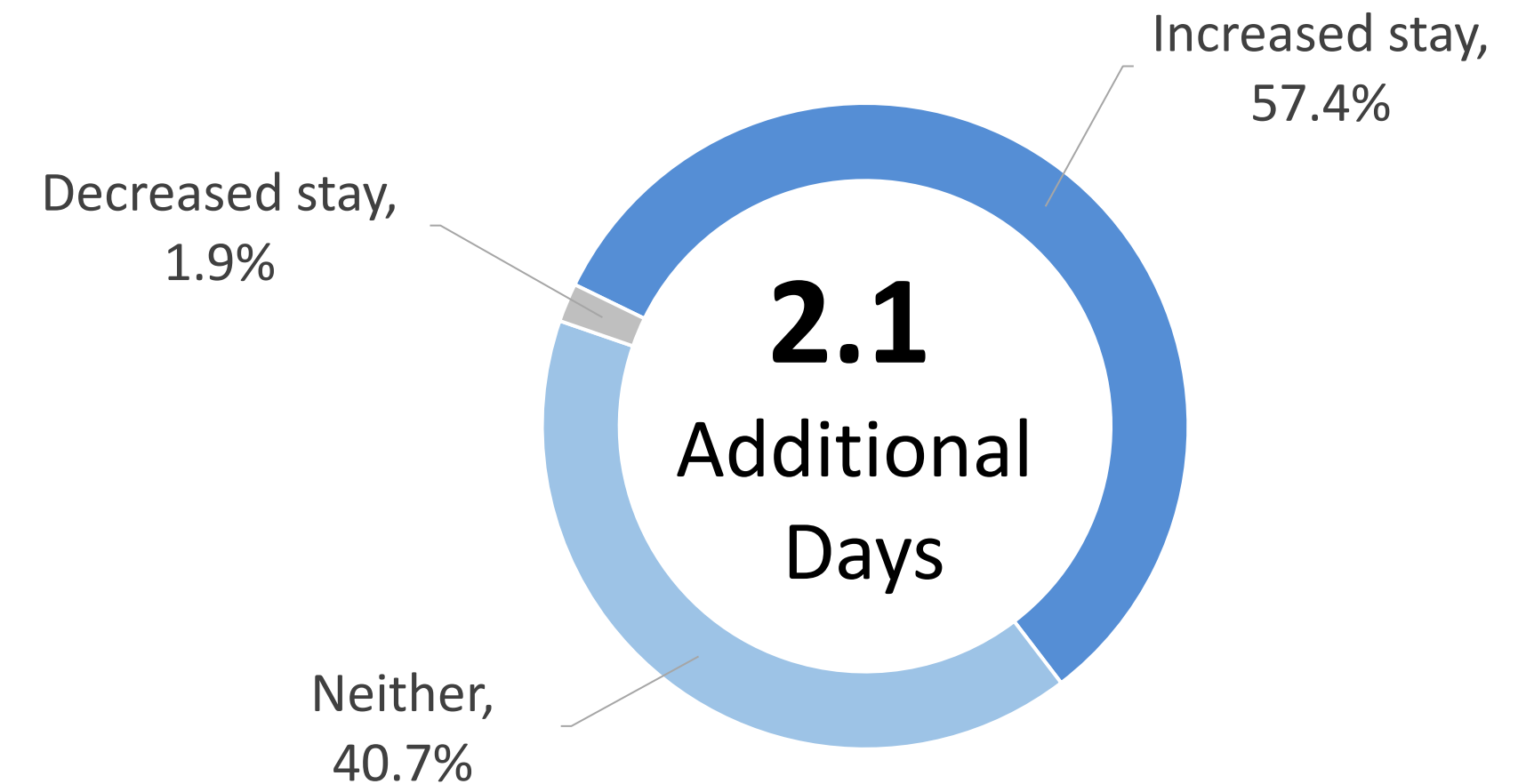
Nearly 60 percent of in-state STO website users who reported that the website influenced the number of days they spent in the state reported that it increased their length of stay (57.4%). Similar to out-of-state website users, this group increased their intended length of stay in the destination by an average of 2.1 days.

Impact of Website on Length of Stay – Out-of-state

Increased stay, 68.8%

Decreased stay, 1.0%

2.1 Additional Days

Neither, 30.2%

Impact of Website on Length of Stay – In-state

Increased stay, 57.4%

Decreased stay, 1.9%

2.1 Additional Days

Neither, 40.7%

Question(s): How did our website influence the number of days you spent in [STATE] on this trip? (Select one) How many days did you increase the length of your stay as a result of using our website? Base: All out-of-state business or conference travelers or those who reported that the website did not influence their destination decision but did influence their length of stay; 960 responses.

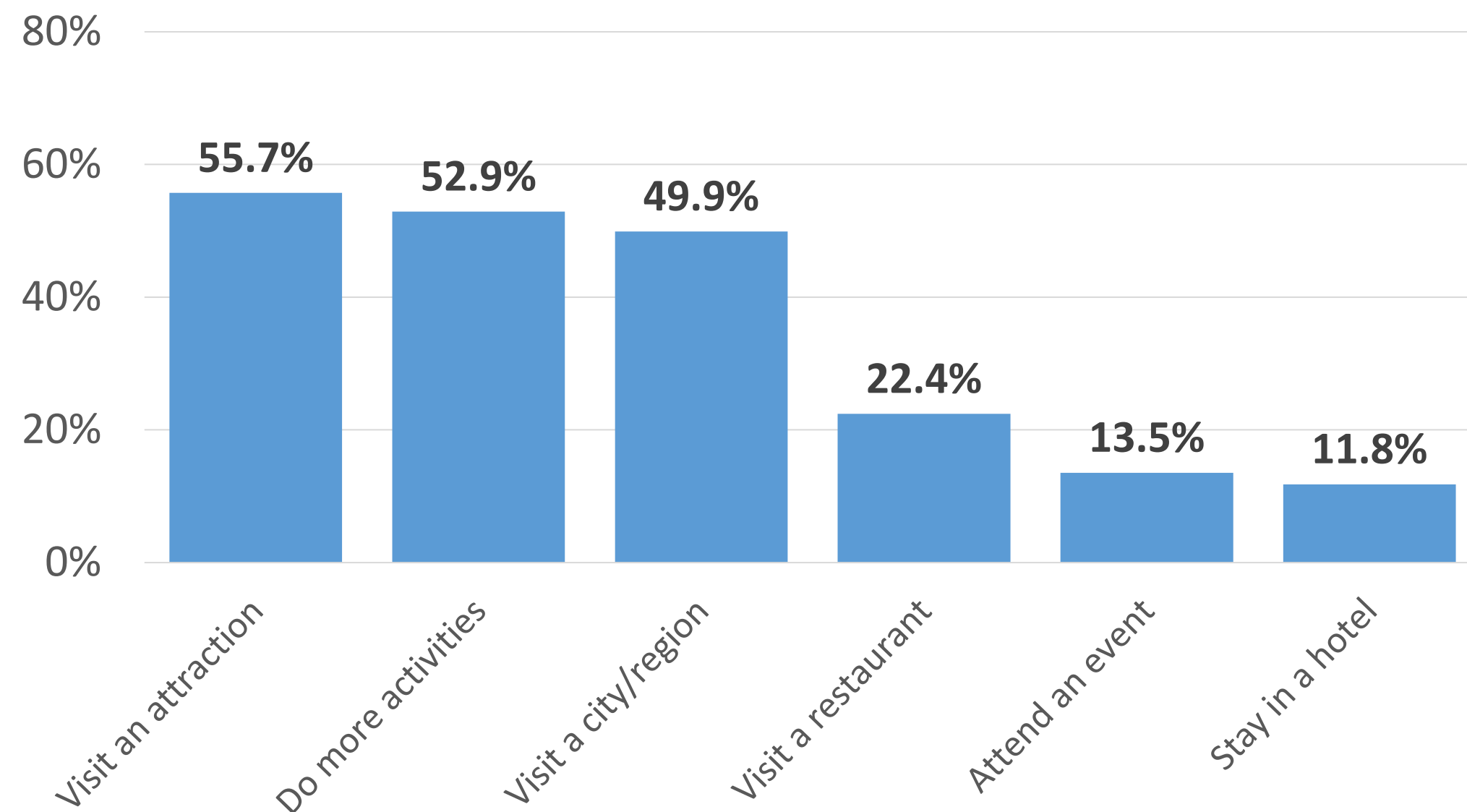Question(s): How did our website influence the number of days you spent in [STATE] on this trip? (Select one) How many days did you increase the length of your stay as a result of using our website? Base: All in-state business or conference travelers or those who reported that the website did not influence their destination decision but did influence their length of stay; 172 responses.

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Trip Decisions Influenced and Influential Website Content

In addition to being an overall driver of incremental visitation to their respective state destination, STO websites influence the trip decisions made by their users and are generators of increased economic activity by visitors. Website users who visited the state reported that the site motivated them to go to an attraction (55.7%), do more activities (52.9%) and visit a certain city/region (49.9%).

Content specific to attractions is most influential in helping STO website users plan their visit to the destination (77.9%). Information on cities/regions (42.9%), maps/transportation (36.0%), dining/restaurant content (30.7%), event details (26.3%) and website images (25.8%) were also motivational in getting STO website users to actually make the decision to visit and/or plan a trip.

Trip Decisions Influenced

Bar chart "Trip Decisions Influenced":
- Visit an attraction: 55.7%
- Do more activities: 52.9%
- Visit a city/region: 49.9%
- Visit a restaurant: 22.4%
- Attend an event: 13.5%
- Stay in a hotel: 11.8%

Most Influential Website Content

Bar chart "Most Influential Website Content":
- Attractions: 77.9%
- Cities/regions: 42.7%
- Maps/transportation: 36.0%
- Dining/restaurants: 28.7%
- Events: 26.3%
- Images: 25.8%
- Lodging/hotels: 19.6%
- Articles: 7.4%
- Video: 6.7%

Question: Did the website influence you to do any of the following? (Select all that apply) Base: All respondents who visited after using the website; 15,798 responses.
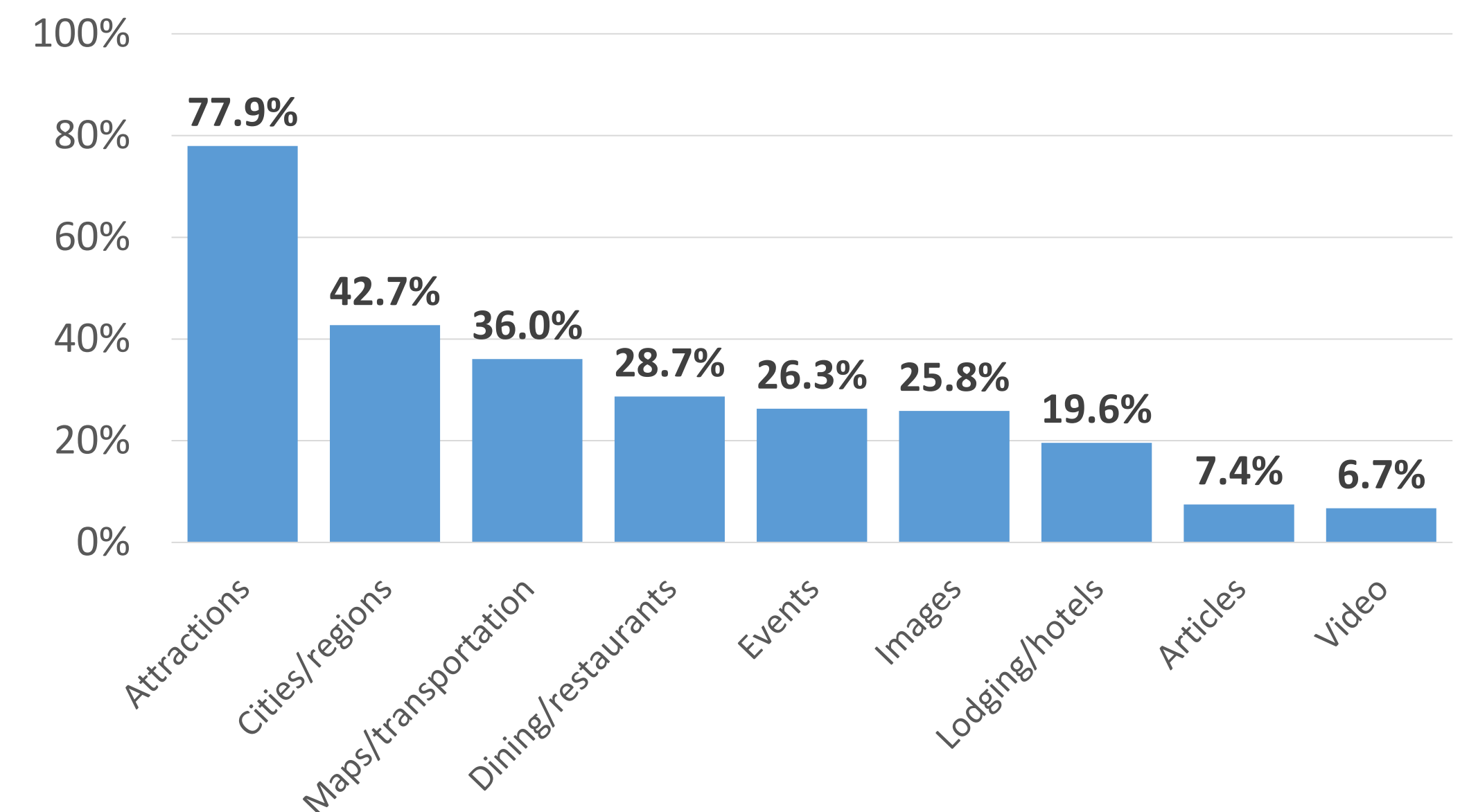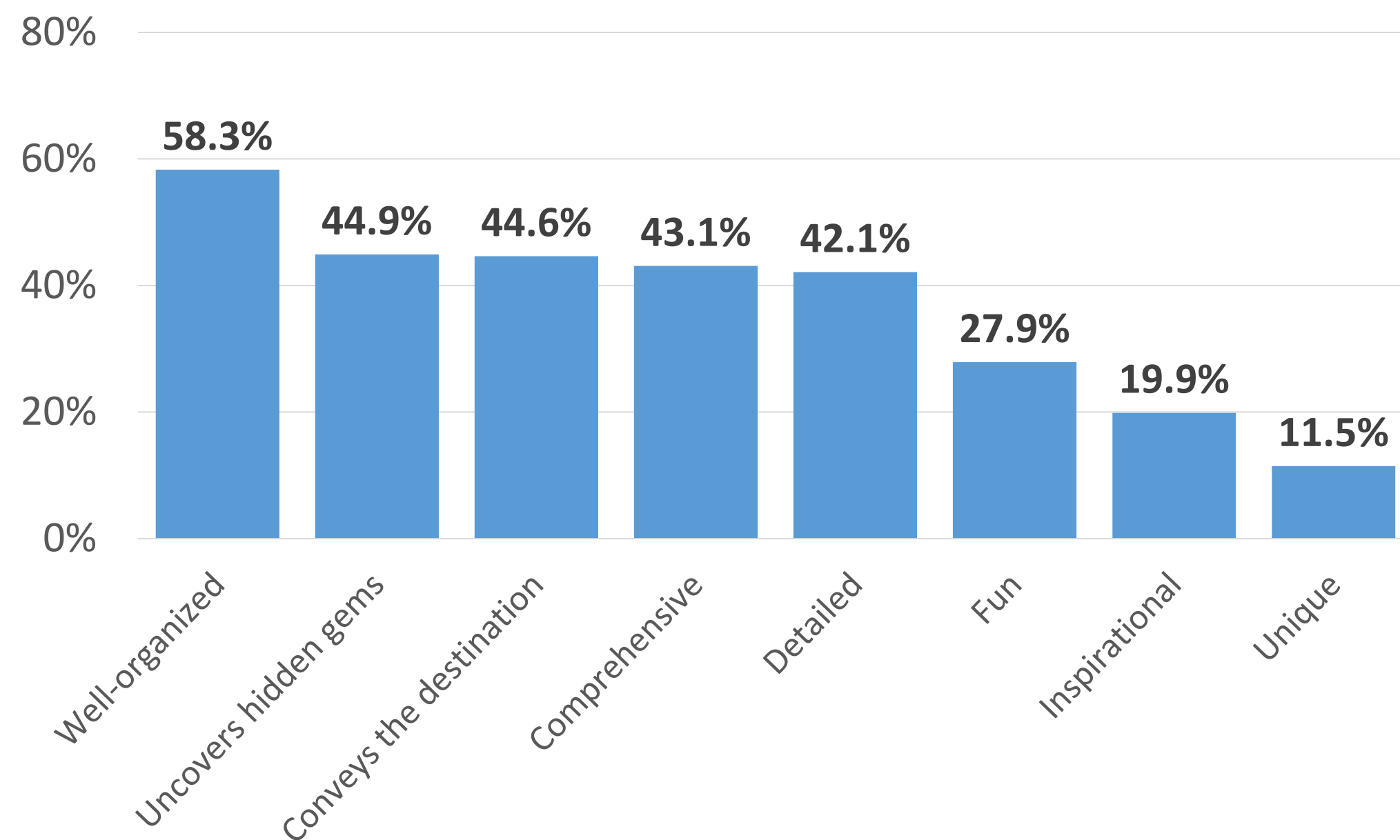
Question: What types of content on our website were most influential in planning this trip? (Select all that apply) Base: All respondents who visited after using the website; 15,798 responses.

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Descriptions of Website Content and Likelihood to Recommend Website

Website users most commonly described a state tourism office website as a resource that is "well-organized" (58.3%). These sites were also commonly seen as sources that "uncover hidden gems" (44.9%), "convey the destination" (44.6%), are "comprehensive" (43.1%) and are "detailed" (42.1%). There is an opportunity for more STO websites to be perceived as "fun," "inspirational" and "unique."

STO websites are highly likely to be recommended by users to others planning a trip to the state. Using a 10-point scale, website users who visited rated their likelihood to recommend the website to others planning a trip to (or within) the state an 8.6 on average.

Descriptions of Website Content

Category	Percentage
Well-organized	58.3%
Uncovers hidden gems	44.9%
Conveys the destination	44.6%
Comprehensive	43.1%
Detailed	42.1%
Fun	27.9%
Inspirational	19.9%
Unique	11.5%

Likelihood to Recommend Website – 10 Point Scale

8.6 Out of 10

Question: Which of these words and phrases (if any) describe the content available on our website? (Select all that apply). Base: All respondents who used the website; 23,642 responses.

Question: How likely would you be to recommend this website to others planning a trip to or within [STATE]? Base: All respondents who visited after using the website; 23,642 responses.

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SITE BEHAVIOR INSIGHTS FROM GOOGLE ANALYTICS

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Website Analytics Insights: Key Definitions

The following pages present data from the State Tourism Offices' (STO) website analytics based on respondents who completed the Website User Intercept Survey. The following terms are used within this section and defined below:

➢ **Potential visitors** - website users who were gathering trip information when they accessed any participating STO website.

Decided - potential visitors who already made the decision to visit the state when they accessed the State Tourism Office website.

Searching for Inspiration Objective – potential visitors who visited the website to search for inspiration.

Interested - potential visitors who were interested in visiting the state when they accessed the State Tourism Office website but had not yet made any firm travel plans.

Gathering Information Objective – potential visitors who visited the website to gather information on places to go and/or things to do.

Just Considering – potential visitors who were simply considering destinations for a leisure trip when they accessed the State Tourism Office website.

Planning Trip Itinerary Objective – potential visitors who visited the website to compare features of places to go and/or things to do for a trip itinerary.

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Website Analytics Insights: Key Definitions (continued)

➢ **Potential visitors** - website users who were gathering trip information when they any participating State Tourism Office website.
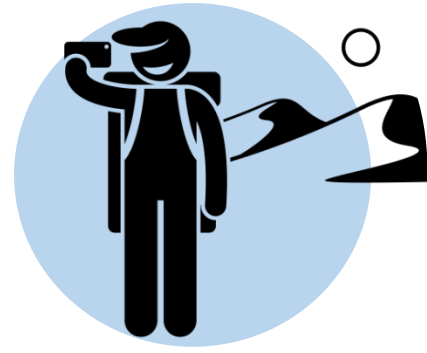
Millennials - potential visitors between the ages of 18 to 36.

Generation X - potential visitors between the ages of 37 to 53.
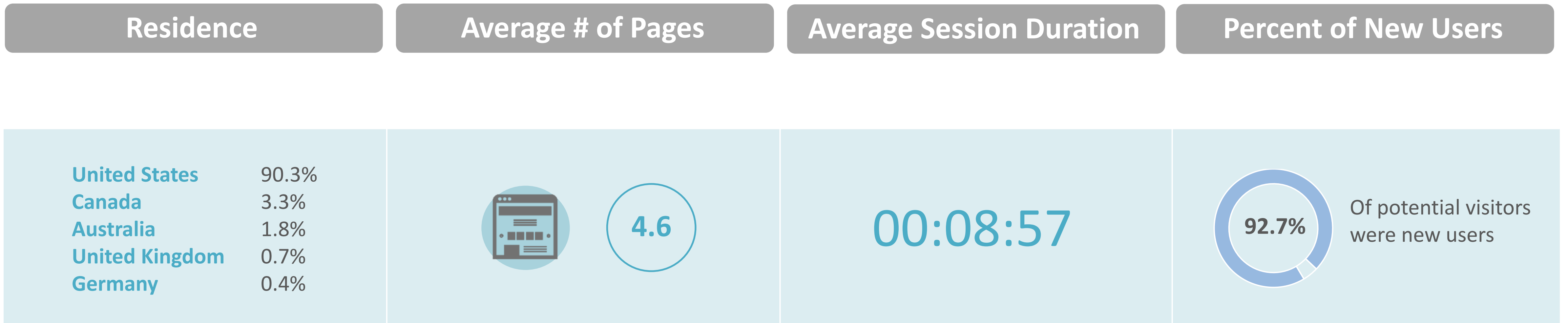
Baby Boomers - potential visitors between the ages of 54 to 72.

➢ **Not Potential visitors** - website users who were NOT gathering trip information when they accessed any participating State Tourism Office website.

Potential Visitors—Residence and Website Use

Potential visitors are highly engaged with the participating STO websites. The information below shows the residence, average number of page views, average session duration and the percentage of new users who were gathering information for a trip on the STO website.

Nearly one-in-ten potential visitors lived outside the United States (9.7%) and 90.3 percent were U.S. residents. On average, potential visitors viewed 4.6 pages and spent over 8 minutes on a state tourism office website. On average, potential visitors viewed 4.6 pages and spent over 8 minutes on the website and a large majority of website users were first-time users (92.7%).

Residence	Average # of Pages	Average Session Duration	Percent of New Users
United States 90.3% Canada 3.3% Australia 1.8% United Kingdom 0.7% Germany 0.4%	4.6	00:08:57	92.7% Of potential visitors were new users

Source: Participating STO Websites Google Analytics

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Travel Planning Stage—Website Use

On average, STO website usage varied slightly by travel planning stage. The information below shows the average number of page views, average session duration and percent of new users for potential visitors who were in the travel planning process. On average, website users who had decided to visit one of the nine states studied spent the most time (9:44) and viewed slightly more pages (4.9 pages) on the website compared to potential users in other travel planning stages. Those most likely to be influenced by the website (interested in visiting one of the nine states and those just considering destinations) represented the largest proportion of new website users who visited the site (94.8% and 94.4%, respectively) compared to those in the decided stage.

Average Number of Pages	Average Session Duration	Percent of New Users

DECIDED

4.9	00:09:44	91.4% Of potential visitors who already decided to visit were new users

INTERESTED

4.5	00:08:40	94.8% Of potential visitors who were interested in visiting were new users

JUST CONSIDERING

4.2	00:08:06	94.4% Of potential visitors who were considering travel destinations were new users

Source: Participating STO Websites Google Analytics

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Travel Planning Stage—Site Acquisition

Potential visitors in each stage of the travel planning process most commonly arrived at a state tourism office website via organic search (at 60% or more for each of the travel planning stages). Those who have already decided to visit one of the nine states studied were more inclined to arrive to the site directly (11.4%), while those interested in visiting one of the nine states studied were more apt to arrive though paid search (15.6%) compared to those in other travel planning stages. Those considering destinations were more likely to arrive via an email newsletter (9.0%) compared to the other segments.

Site Acquisition

DECIDED

- Organic Search (62.5%)
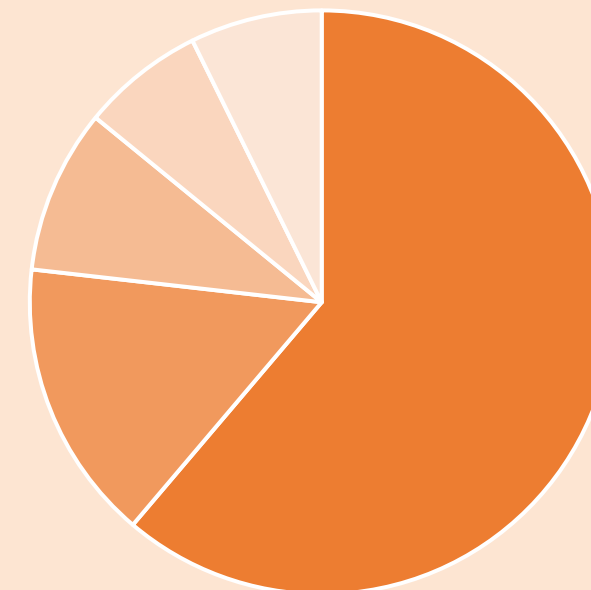- Paid Search (12.8%)
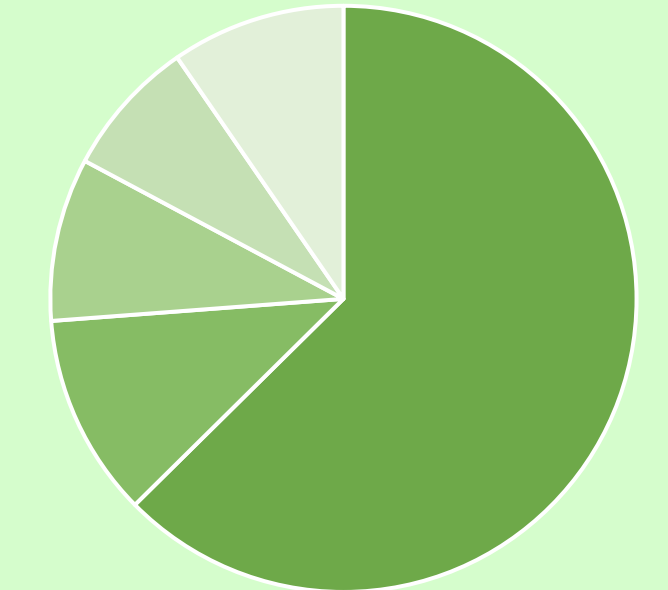- Direct (11.4%)
- Email (5.8%)
- Other (7.4%)
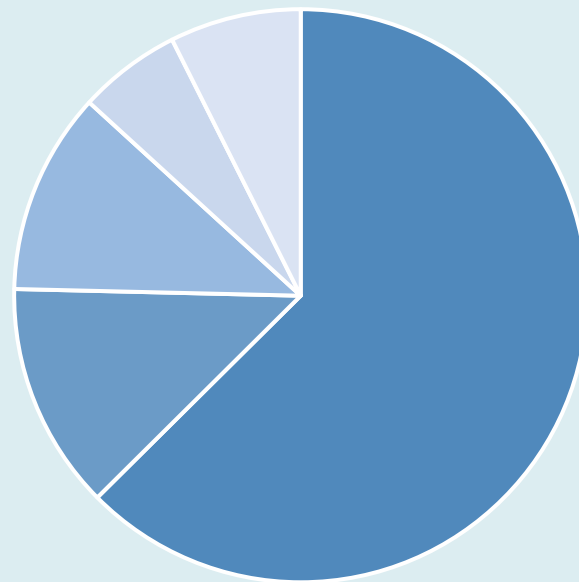
INTERESTED

- Organic Search (61.2%)
- Paid Search (15.6%)
- Direct (9.1%)
- Email (6.8%)
- Other (7.3%)

JUST CONSIDERING

- Organic Search (62.6%)
- Paid Search (11.2%)
- Email (9.0%)
- Direct (7.6%)
- Other (9.6%)

Source: Participating STO Websites Google Analytics

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Travel Planning Stage—Top Pageview Types

The Things to Do and Attractions pages were the most frequently viewed pages by potential travelers in each planning stage. The information below shows the top pageview types for potential visitors who were in the travel planning process. While potential travelers were most likely to view the Things to Do and Attractions related pages, those who already decided to visit the state were more inclined to view Region and City pages (17.7%), while those interested in visiting the state were more apt to view Travel Guide/Newsletter pages (17.1%). Interestingly, those just considering destinations were more likely to view pages related to Articles/Stories/Blogs (14.5%).

Top Pageview Types

DECIDED

35.6% Things to do/Attractions	**17.1%** Regions/Cities	**14.9%** Travel Guide/Newsletter	**12.5%** Articles/Stories/Blogs

INTERESTED

35.2% Things to do/Attractions	**17.1%** Travel Guide/Newsletter	**14.0%** Regions/Cities	**12.9%** Articles/Stories/Blogs

JUST CONSIDERING

36.5% Things to do/Attractions	**14.5%** Articles/Stories/Blogs	**14.3%** Regions/Cities	**12.9%** Travel Guide/Newsletter

Source: Participating STO Websites Google Analytics

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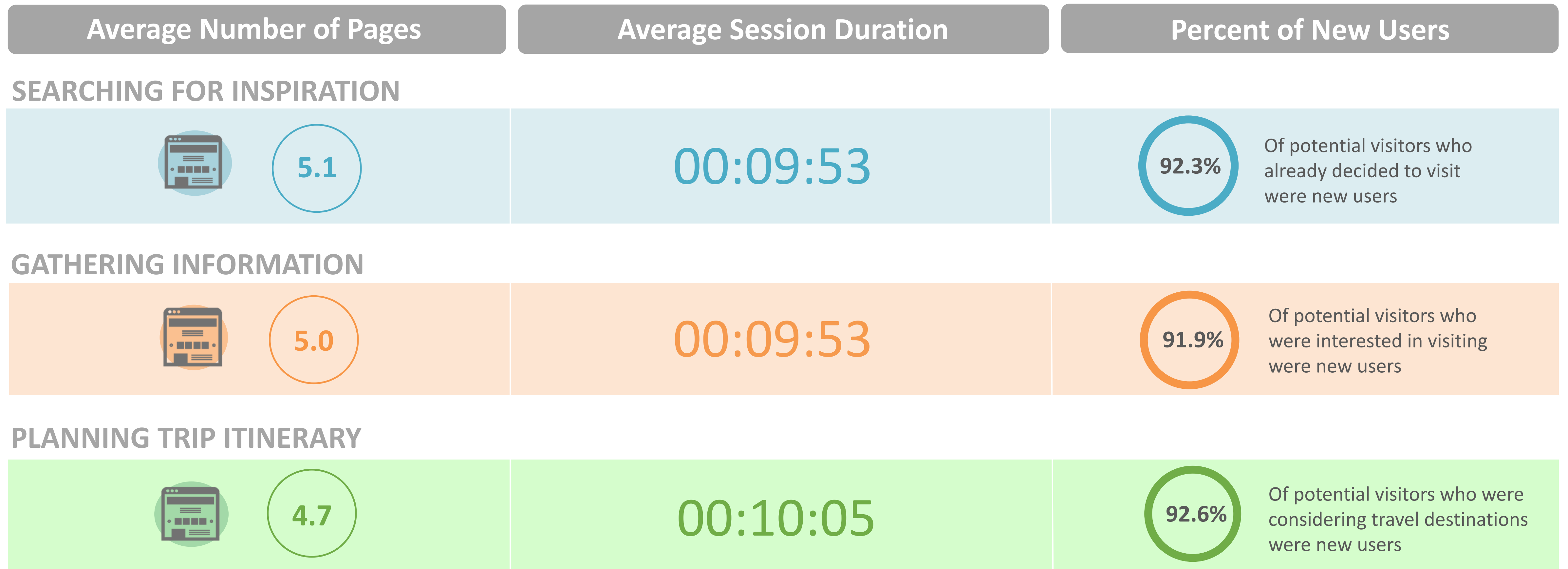DO YOUR RESEARCH

Objective for Using Website—Website Use

All three segments using an STO website for a specific objective spent a similar amount of time on site. The information below shows the average number of page views, average session duration and percent of new users for potential travelers who were either searching for inspiration, gathering information or planning a trip itinerary on the site. On average, those planning a trip itinerary spent the most time (10:05) compared to the other stages.

Average Number of Pages	Average Session Duration	Percent of New Users
SEARCHING FOR INSPIRATION		
5.1	00:09:53	92.3% Of potential visitors who already decided to visit were new users
GATHERING INFORMATION		
5.0	00:09:53	91.9% Of potential visitors who were interested in visiting were new users
PLANNING TRIP ITINERARY		
4.7	00:10:05	92.6% Of potential visitors who were considering travel destinations were new users

Source: Participating STO Websites Google Analytics

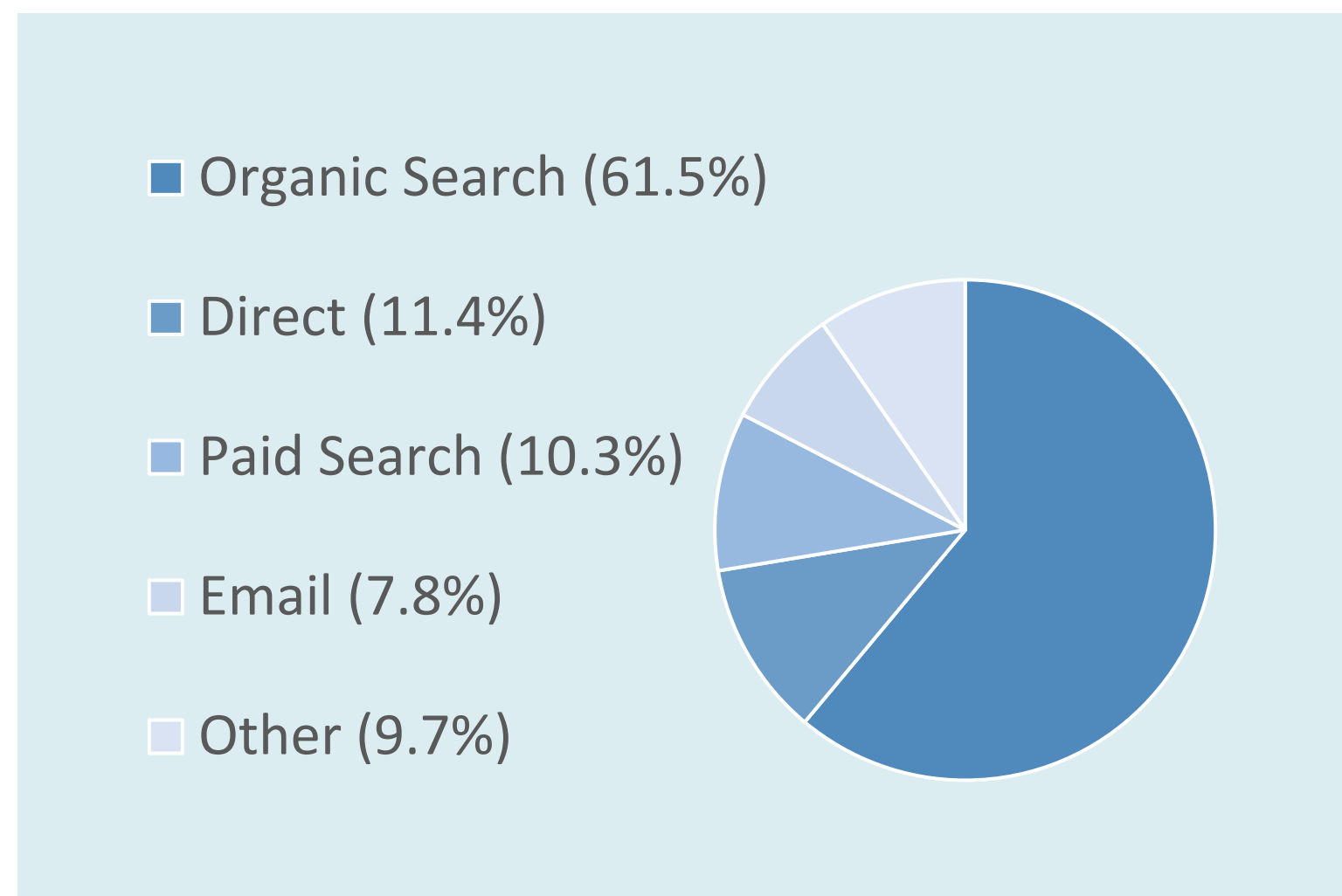Destination Analysts
DO YOUR RESEARCH
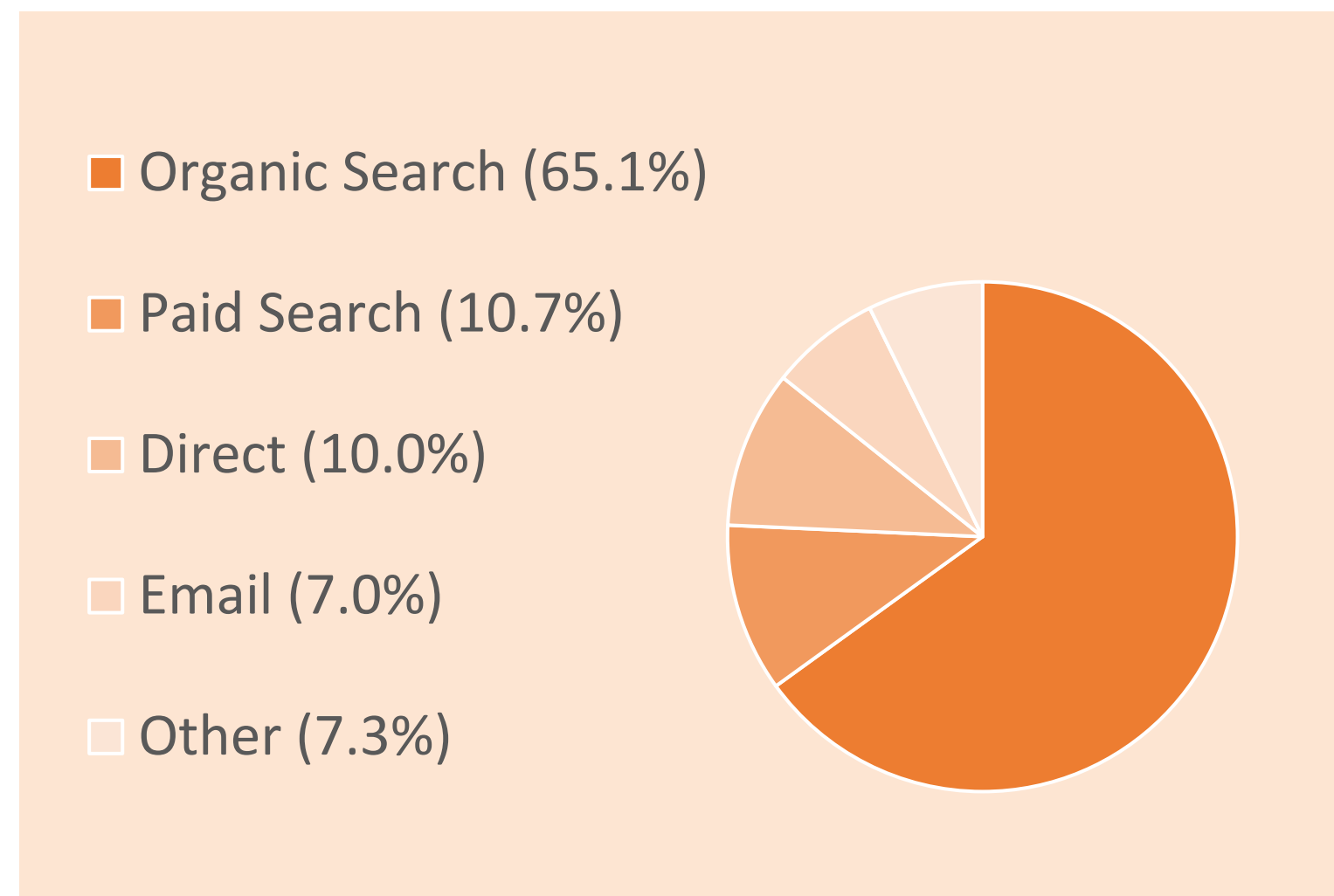
Objective for Using Website—Site Acquisition

Potential visitors with a specific objective for using an official state tourism office website most commonly arrived to the site via organic search. The information below shows the primary sources of site acquisition for potential visitors either searching for inspiration, gathering information or planning a trip itinerary. Organic search was the top method of arrival for potential visitors gathering information (65.1%). Meanwhile, paid search (12.4%) and email (8.7%) were top methods of arrival for those planning a trip itinerary. Those searching for inspiration were slightly more apt to arrive directly (11.4%) compared to the other segments.

Site Acquisition

SEARCHING FOR INSPIRATION

- Organic Search (61.5%)
- Direct (11.4%)
- Paid Search (10.3%)
- Email (7.8%)
- Other (9.7%)

GATHERING INFORMATION

- Organic Search (65.1%)
- Paid Search (10.7%)
- Direct (10.0%)
- Email (7.0%)
- Other (7.3%)

PLANNING TRIP ITINERARY

- Organic Search (59.8%)
- Paid Search (12.4%)
- Direct (10.3%)
- Email (8.7%)
- Other (9.0%)

Source: Participating STO Websites Google Analytics

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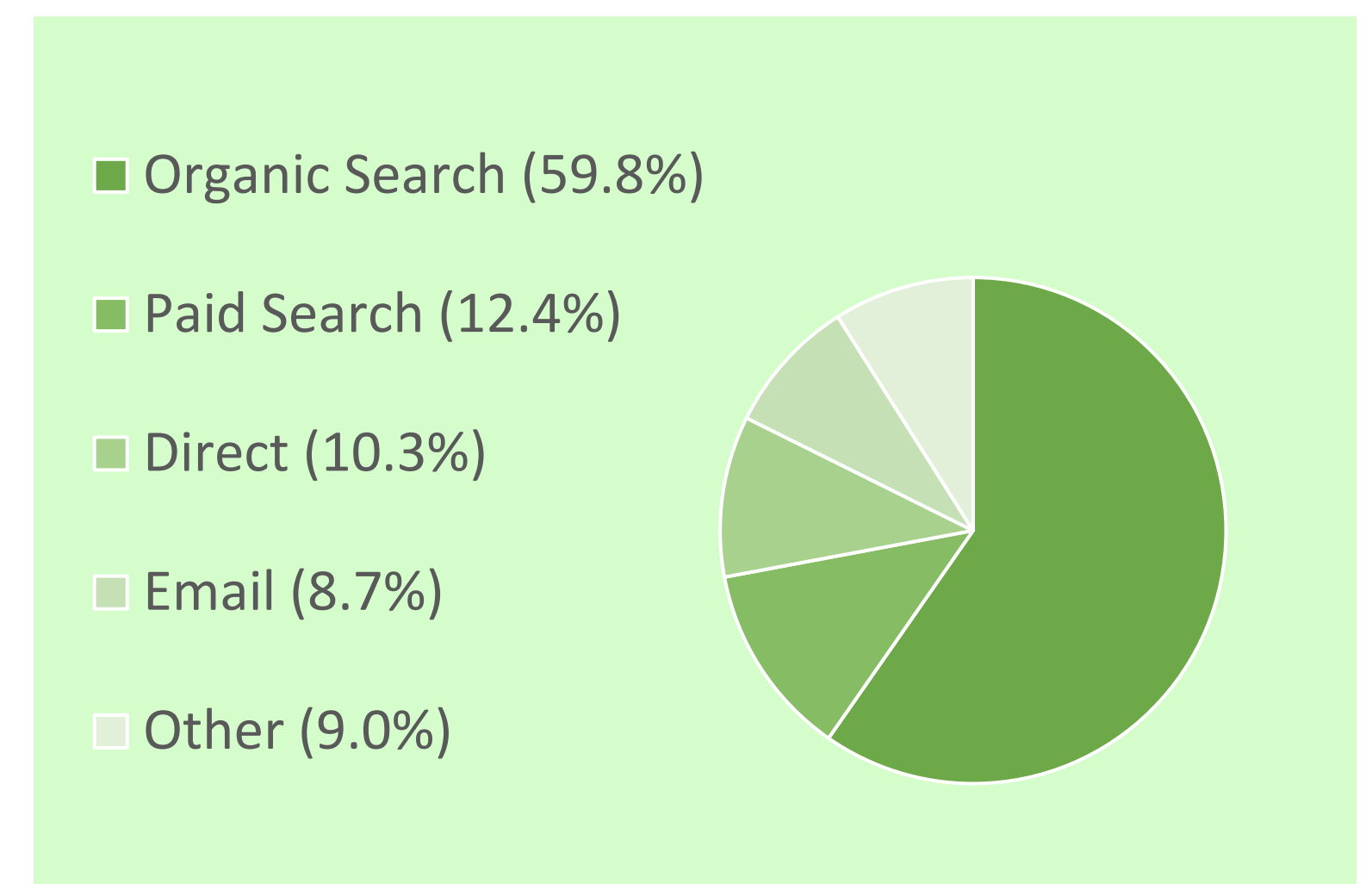
Objective for Using Website—Top Pageview Types

Pageviews varied by objectives for using a state tourism office website. The information below shows the top pageview types for potential visitors either searching for inspiration, gathering information or planning a trip itinerary on the site. While potential travelers were most likely to view the Things to Do and Attractions related pages, those gathering information and searching for inspiration were more likely to view Region and City pages (16.3% & 15.2%, respectively), while those planning a trip itinerary were more likely to view the Travel Guide/Newsletter pages (15.8%). Those searching for inspiration and planning a trip itinerary had a greater likelihood to view Articles/Stories/Blogs pages (14.2% & 14.1%, respectively).

Top Pageview Types

SEARCHING FOR INSPIRATION

35.6% Things to do/Attractions   **15.2%** Regions/Cities   **15.0%** Travel Guide/Newsletter   **14.2%** Articles/Stories/Blogs

GATHERING INFORMATION

36.2% Things to do/Attractions   **16.3%** Regions/Cities   **14.2%** Travel Guide/Newsletter   **12.7%** Articles/Stories/Blogs

PLANNING TRIP ITINERARY

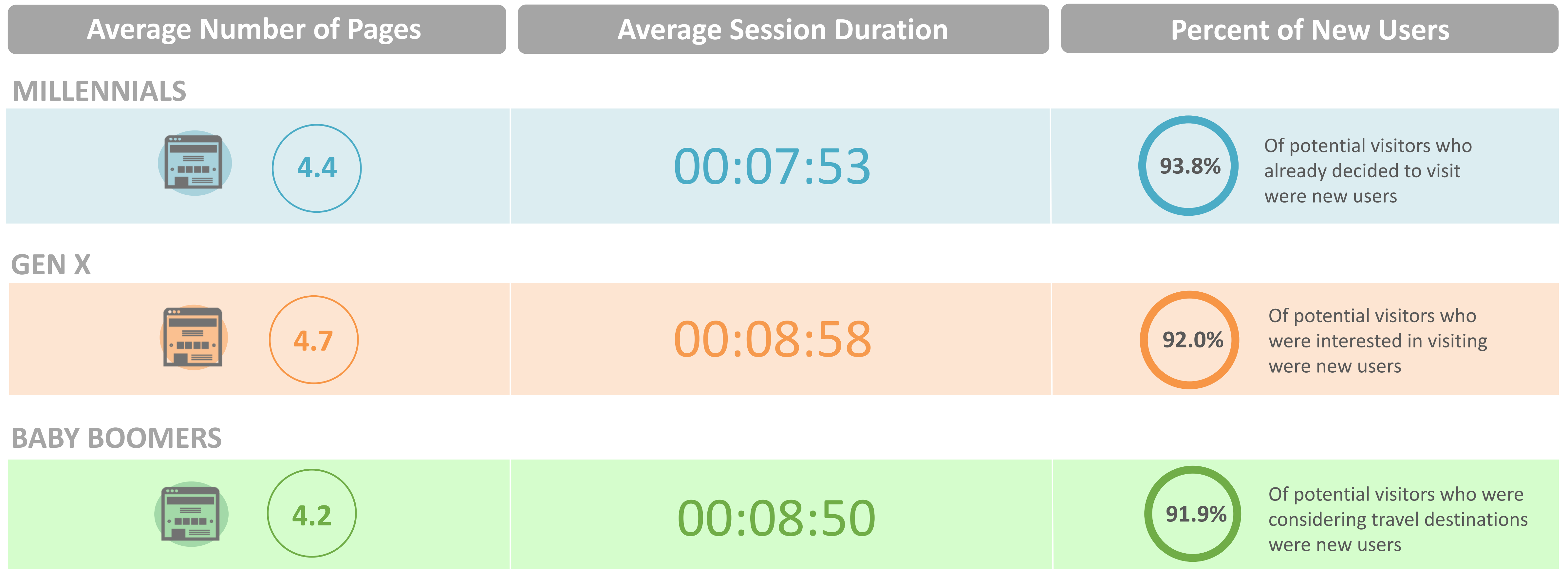**33.4%** Things to do/Attractions   **15.8%** Travel Guide/Newsletter   **14.1%** Regions/Cities   **14.1%** Articles/Stories/Blogs

Source: Participating STO Websites Google Analytics

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Generations—Website Use

Gen Xers viewed more pages and spent slightly more time on an official website compared to Baby Boomers and Millennials. The information below shows the average number of page views, average session duration and percent of new users for Millennials, Gen Xers and Baby Boomers gathering trip information on the site. Gen Xers spent more time (8:58 minutes) and viewed more pages (4.7 pages) compared to Baby Boomers and Millennials. Millennials were most likely to be new users of the site (93.8%).

Average Number of Pages	Average Session Duration	Percent of New Users
MILLENNIALS		
4.4	00:07:53	93.8% Of potential visitors who already decided to visit were new users
GEN X		
4.7	00:08:58	92.0% Of potential visitors who were interested in visiting were new users
BABY BOOMERS		
4.2	00:08:50	91.9% Of potential visitors who were considering travel destinations were new users

Source: Participating STO Websites Google Analytics

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Generations—Site Acquisition

Site acquisition was relatively different across generations. The information below shows the primary sources of site acquisition for Millennials, Gen Xers and Baby Boomers. Organic search was the top method of arrival for all generations, and highest for Millennials (at 64.2%) compared to other generations. However, Baby Boomers were more likely to arrive at an official state tourism office website via email (10.0%), while Millennials were more apt to arrive directly (9.3%) compared to the other generations. Gen Xers were more inclined to arrive through paid search (7.6%).
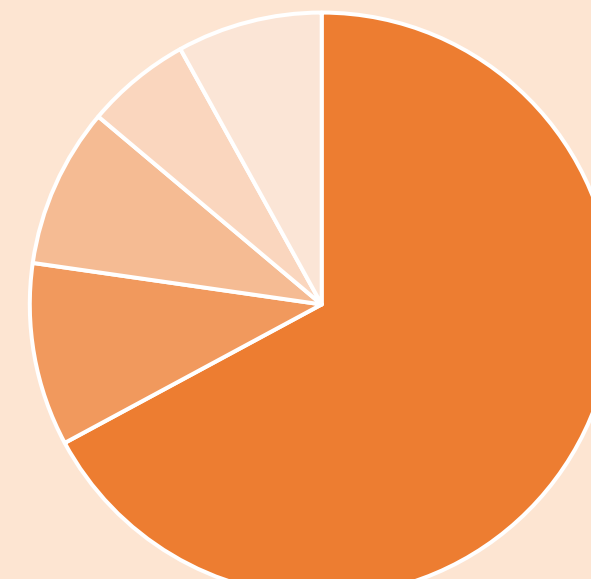
Site Acquisition

MILLENNIALS

- Organic Search (64.2%)
- Direct (9.3%)
- Referral (4.9%)
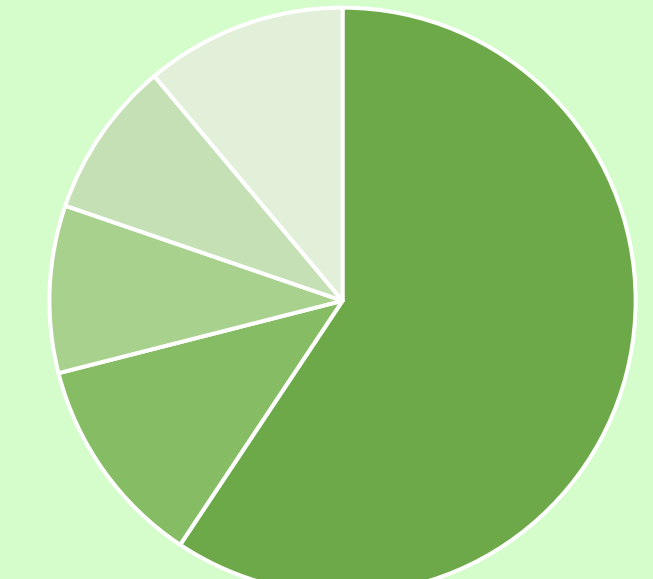- Paid Search (4.4%)
- Other (2.7%)
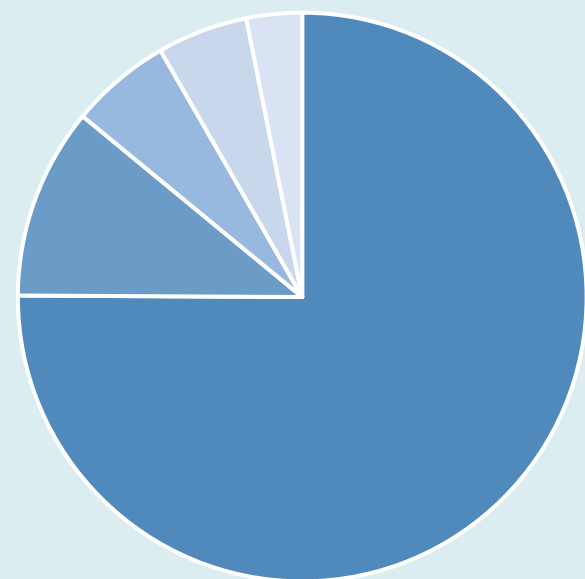
GEN X

- Organic Search (57.6%)
- Direct (8.7%)
- Paid Search (7.6%)
- Referral (5.0%)
- Other (6.9%)

BABY BOOMERS

- Organic Search (50.8%)
- Email (10.0%)
- Direct (7.9%)
- Referral (7.4%)
- Other (9.5%)

Source: Participating STO Websites Google Analytics

Generations—Top Pageview Types

The Things to Do/Attractions and Regions/Cities pages were commonly viewed by all generations. The information below shows the top pageview types for potential visitors broken out by Millennials, Gen Xers and Baby Boomers generational segments. Millennials were most likely to view the Things to Do/Attractions pages (41.1%) and least likely to view the Travel Guide/Newsletter pages (8.6%) compared to the other generations. Baby Boomers were more apt to view Articles/Stories/Blogs type pages (14.2%) compared to Gen Xers and Millennials.

Top Pageview Types

MILLENNIALS

| **41.1%** Things to do/Attractions | **14.9%** Regions/Cities | **13.7%** Articles/Stories/Blogs | **8.6%** Travel Guide/Newsletter |

GEN X

| **36.4%** Things to do/Attractions | **15.6%** Regions/Cities | **13.3%** Articles/Stories/Blogs | **12.5%** Travel Guide/Newsletter |

BABY BOOMERS

| **32.4%** Things to do/Attractions | **15.6%** Regions/Cities | **15.3%** Travel Guide/Newsletter | **14.2%** Articles/Stories/Blogs |

Source: Participating STO Websites Google Analytics

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ECONOMIC IMPACT OF STATE TOURISM OFFICE WEBSITES

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Economic Impact

Economic impact for a State Tourism Office marketing program—such as a website—can best be defined as the total amount of **direct visitor spending in the destination that is generated by the program**. Alternatively, a State Tourism Office marketing program's economic impact can be defined as the amount of visitor spending in the destination that would **not have occurred in the absence of the program**.

The surveys used in this research collected information critical to calculating economic impact, such as actual visitation to the state after using the website, whether those that did visit the state had already made up their mind to visit when they arrived on the website, as well as detailed information on their trip purpose and in-market spending behavior. Such data allowed us to differentiate between leisure and business/conference visitors and others and measure in-market spending by visitors influenced by the participating State Tourism Office websites to visit or extend their stay in the destination.

Website ROI Estimates—Quick Facts Summary

This profile shows a summary of fundamental ROI findings and descriptive statistics emerging from this research for out-of-state website users. These findings are based on 13,149,428 real, new website users of the 9 participating State Tourism Office websites between May 2017 and December 2019.

The total number of real, new website users is the number of desktop users, mobile users and tablet users minus the respective bounce rates for each of these device types as recorded in Google Analytics. The number of real, new website users accounts for the amount of website traffic that has the minimum potential value for the purposes of calculating ROI. This is one of several measures used to ensure conservativeness in the website ROI estimates.

Total Incremental Trips Generated by 9 participating STO Websites Studied	**361,085 Trips**
Total Visitor Spending on these Incremental Trips	**$725,165,691**
Additional Trip Days from Trips Extended by 9 Participating STO Websites Studied	**210,659 Days**
Total Visitor Spending on Additional Trip Days from Trips Extended	**$85,466,465**
Total Economic Impact from Visitor Spending Generated by 9 Participating STO Websites Studied	**$810,635,156**
Average Visitor Spending economic impact generated per real new website user	**$57.03**

Website ROI Key Findings

The key ROI findings for out-of-state website users of the study are summarized following.

- **Incremental trips generated by the 9 participating state tourism office websites studied:** For 13,149,428 real, new users of the 9 state tourism office websites, an estimated 361,085 incremental trips were generated for the respective destinations. An incremental trip is one in which the user decided to visit the destination based on their experience with the STO website. These were trips to the destination that would not have happened if the website did not exist, and thus any visitor spending in the destination on these trips can be counted as part of the website's economic impact. The average incremental trip lasted 4.7 days, with a reported in-market spending of $393.52 per day for each visitor and their immediate party. These incremental trips are estimated to have generated $725,165,691 in new visitor spending in these destinations.

- **Additional days on trips extended generated by the 9 participating state tourism office websites studied:** A second way STO websites can generate economic value is by inspiring visitors to extend their stays. The research conducted shows that for 13,149,428 real, new users of these 9 sites, 210,659 new visitor days were generated for the respective destinations. This is estimated to have resulted in an additional $85,466,465 in incremental visitor spending in these destinations.

- **Total estimated economic impact of the 9 participating state tourism office websites studied:** The two components discussed above (spending on incremental trips and additional days in-market) comprise the program's economic impact as defined in this study. It is estimated that for 13,149,428 real, new users of the 9 participating official state websites, $810,632,156 in economic impact was generated for the respective destinations. Alternatively, every real, new website user to a state tourism office website results in $57.03 in incremental visitor spending in the destination on average.

Comparative Findings by State

The key findings on the economic impact generated by the 9 participating State Tourism Office websites in the study are summarized below. In order to make these comparisons, the figure of 1,000 real, new website users is the basis for all estimates shown below.

Participating States	Incremental trips generated (per 1,000 real, new users)	Average length of stay (days)	Average visitor spending per day on incremental trips	Total visitor spending on incremental trips	Days spent in-market on trips extended by website (per 1,000 real, new users)	Total visitor spending on trips extended by website	Total economic impact/ROI of the website (per 1,000 real, new users)	Total economic impact/ROI of the website per real, new website user
State A	41	4.1	$372.87	$62,833	24	$8,911	$71,744	$71.74
State B	19	4.0	$400.46	$30,333	10	$4,197	$34,530	$34.53
State C	32	3.5	$366.66	$41,242	12	$4,307	$45,549	$45.55
State D	22	3.6	$363.78	$29,325	11	$4,171	$33,496	$33.50
State E	28	7.1	$377.69	$74,746	17	$6,558	$81,304	$81.30
State F	37	5.4	$438.08	$85,774	24	$10,701	$96,475	$96.48
State G	18	5.8	$420.42	$43,423	10	$4,254	$47,677	$47.68
State H	33	4.8	$402.50	$64,259	13	$5,390	$69,649	$69.65
State J	19	5.1	$382.11	$37,475	12	$4,738	$42,213	$42.21
Average for all Participating States	**27**	**4.7**	**$393.52**	**$50,808**	**16**	**$6,224**	**$57,032**	**$57.03**

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