

TRAVEL



OREGON

TravelOregon.com
Website User & Conversion Study

Final Report of Findings
March 2020

Research prepared for Travel Oregon by:



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Above: Image of Lincoln City from @TravelOregon on Instagram.

Research Overview & Objectives

This report presents the final findings of the TravelOregon.com Website User & Conversion Study. This survey was conducted on behalf of Travel Oregon by Destination Analysts, Inc. from January 2019 through January 2020.

This research is part of a larger study of DMO websites sponsored by Miles Partnership. The nine (9) states of Alaska, Colorado, Florida, Georgia, Kentucky, Louisiana, Oregon, South Dakota, and Wyoming participated in this cooperative research project and represent the aggregate for the “Average state website user” throughout the report.

The primary objectives of this research were to:

- **Determine Website Return on Investment:** The total amount of direct visitor spending in Oregon that was generated by and attributable to its website (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: Image of wildflowers in Oregon from @TravelOregon Twitter.

Methodology

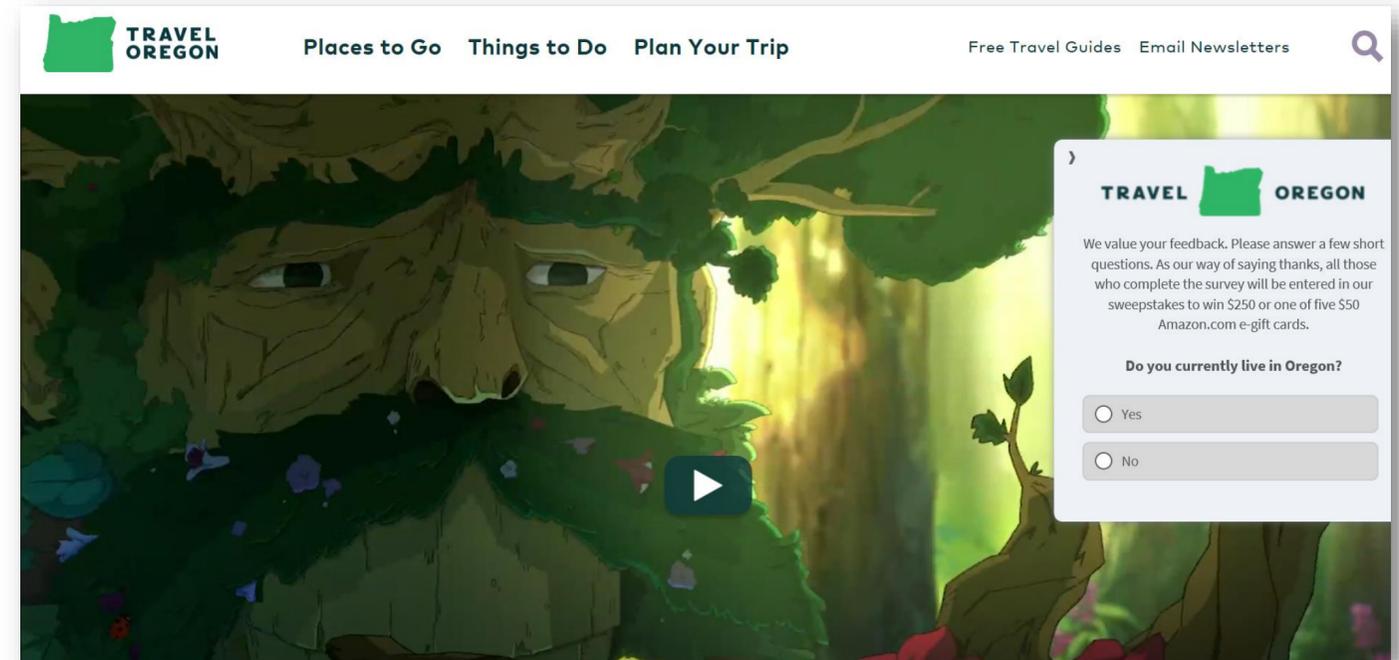
The Website User & Conversion Study was comprised of two surveys:

- (1) The **Website User Intercept Survey** that was completed when a website user was on TravelOregon.com, and
- (2) The **Website User Follow-up Survey** sent after the website user's intended date of travel.

The findings presented within this report include data collected in the Website User Intercept Survey and the Follow-up Survey between January 2019 and February 2020.

Website User Intercept Survey: Upon arriving at TravelOregon.com, a survey appears 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 Oregon, as well as permission to send them a follow-up survey after their planned travel. In total, 77,995 completed surveys were collected in this effort between January 17, 2019 through January 31, 2020.

Website User Follow-up Survey: Survey respondents to the initial Website User Intercept Survey were asked which month they expected to visit Oregon. 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 Oregon and questions relevant to developing estimates of the website's return on investment. In total, 2,790 completed surveys were collected in this effort between February 1, 2019 through January 31, 2020.

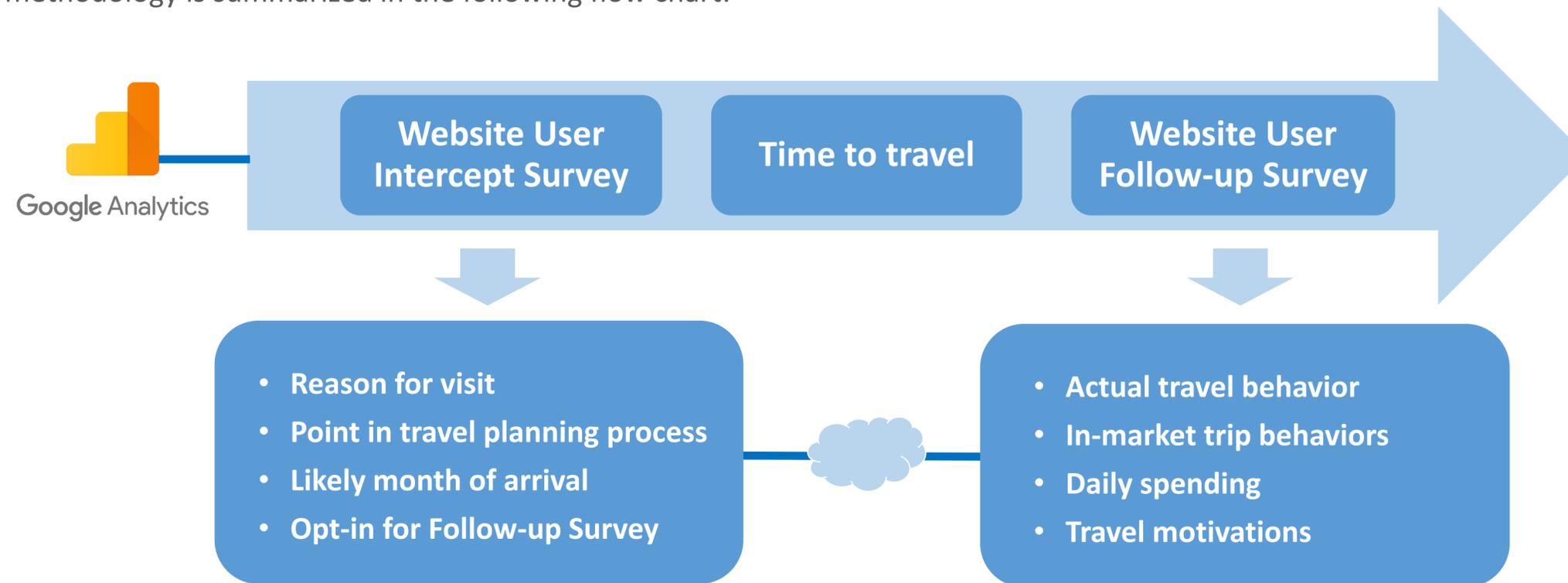


Above: Screenshot of the Website User Intercept Survey on TravelOregon.com.

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 that describes 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 Oregon by two types of out-of-state visitors: those who took incremental trips to Oregon 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 Oregon 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 is 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 Oregon** can be leisure travelers, business travelers or convention/meeting attendees. Leisure travelers who did not state that the website influenced their decision to visit Oregon, and all business and convention travelers were asked a series of questions about the influence of the website on their ultimate length of stay in Oregon. 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:



Website Analytics

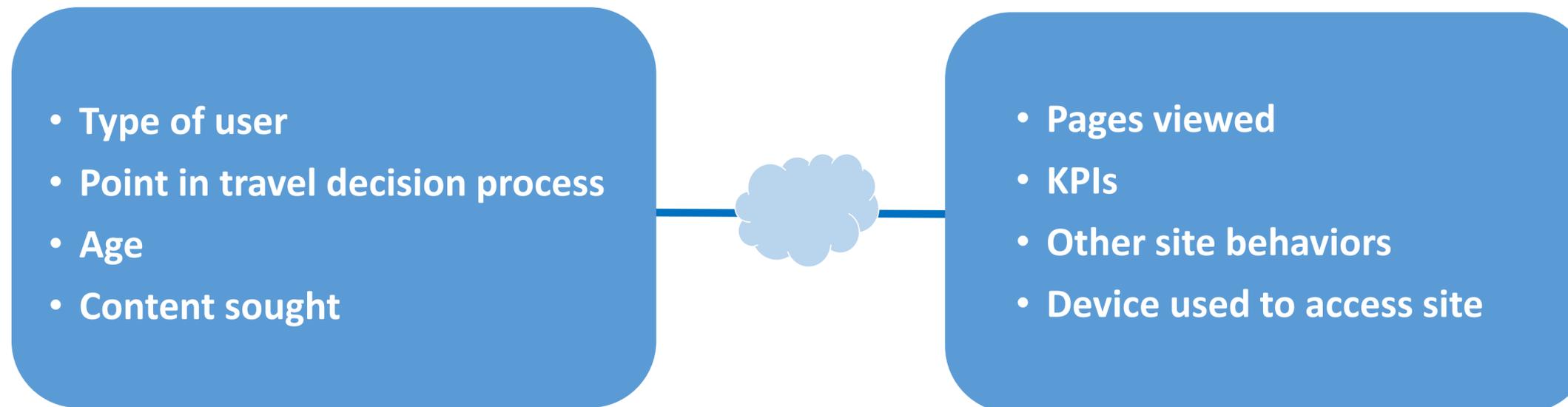
As the Website User Intercept Survey allows for the integration with the site's analytics, this research will include an analysis of site behaviors and key site performance metrics by user groups identified in the Website User Intercept Survey. Findings derived from the website analytics are also presented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

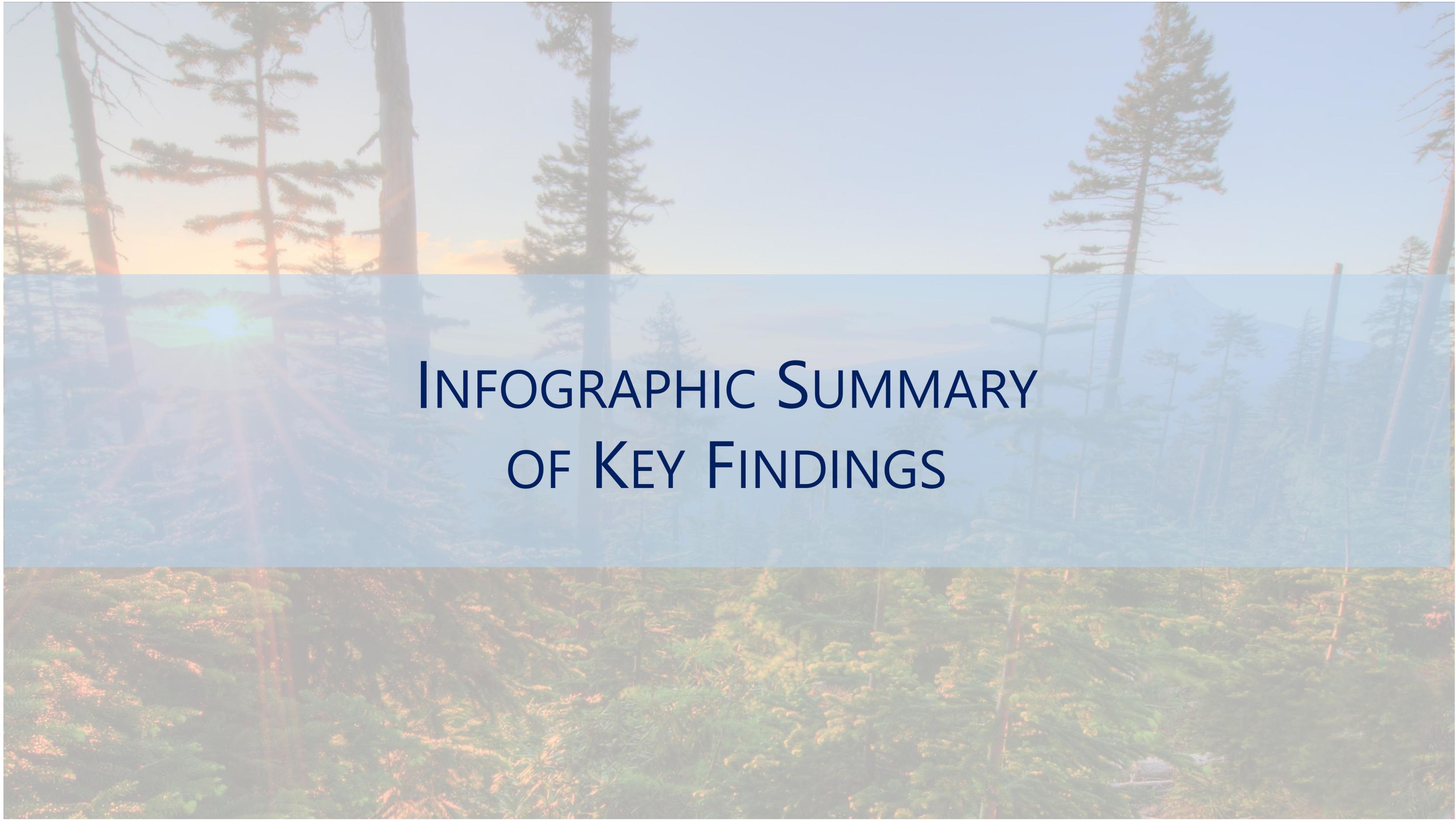


Website User Intercept Survey



Google Analytics



The background image shows a dense forest of tall, thin trees, likely pines or firs, under a soft, hazy sky. The sun is low on the horizon, creating a warm, golden glow and long, soft shadows. A semi-transparent blue horizontal band is overlaid across the middle of the image, containing the title text.

INFOGRAPHIC SUMMARY OF KEY FINDINGS

OUT-OF-STATE TRAVEL OREGON.COM USER KEY FINDINGS

Potential Visitors

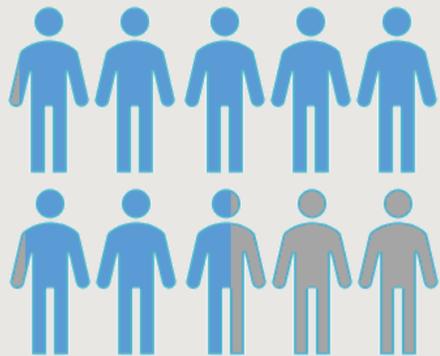
64.8%

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

39.0%

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

Visitation to Oregon



75.9% of survey respondents visited Oregon post-use of the website

Oregon Trip Details



66.1% were on a **vacation**
6.3% were on a **weekend getaway**



On average, out-of-state visitors spent **5.9 days & 5.3 nights** in Oregon



The average visiting travel party spent **\$415.53** in-market, per day



63.5% stayed overnight in a hotel, motel or bed & breakfast in Oregon

Likelihood to Recommend TravelOregon.com



Out-of-state website users who visited rated their likelihood to recommend the website to others planning a trip to Oregon an **8.7** on average using a 10-point scale

Website Influence on Destination Decision and Length of Stay

66.9%

Said the website **influenced their decision to visit Oregon**

54.4%

Of those influenced by the website to visit said the website was **“Important”** or **“Very important”** to their decision

73.0%

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 **2.2 days**

Website ROI

\$42.21

per real, new website user

IN-STATE TRAVEL OREGON.COM USER KEY FINDINGS

Potential Visitors

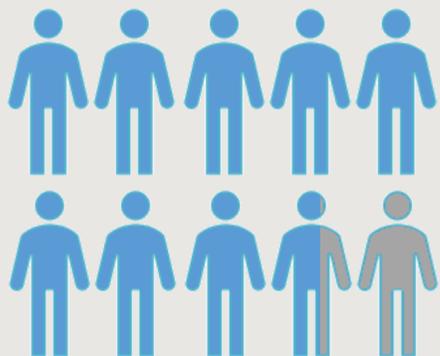
50.2%

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

71.2%

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

Visitation within Oregon



87.3% of survey respondents traveled within Oregon post-use of the website

Oregon Trip Details



41.3% were on a **weekend getaway**
29.3% were on a **vacation**



On average, in-state visitors spent **3.6 days & 2.7 nights** within Oregon



The average visiting travel party spent **\$319.45** in-market, per day



42.3% stayed overnight in a hotel, motel or bed & breakfast in Oregon

Likelihood to Recommend TravelOregon.com



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

Website Influence on Destination Decision and Length of Stay

62.1%

Said the website **influenced their decision to travel within Oregon**

53.1%

Of those influenced by the website to travel within Oregon said the website was **“Important”** or **“Very important”** to their decision

36.1%

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 in-state visitors increased their length of stay by an average of **1.9 days**



TRAVEL OREGON.COM
ROI ESTIMATES

Website ROI Estimates

The profile below 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 1,305,585 real, new website users to TravelOregon.com (1,571,933 real, new desktop users less 47.1% bounce rate; 454,791 real, new tablet users less 50.3% bounce rate; 3,069,915 real, new mobile users less 69.1% bounce rate and an adjustment factor to account for multiple device website users) between January 2019 and February 2020.

Trips to Oregon generated by website (i.e., incremental trips)	25,255
Average length of stay on incremental trips	5.1 days
Average spending per day on these incremental trips	\$382.11
Total visitor spending on incremental trips to Oregon	\$48,926,943
Incremental visitor days spent in Oregon on trips extended by website's influence	16,190
Total visitor spending on trip days extended by website	\$6,186,326
Total economic impact/ROI of the website	\$55,113,269
Total economic impact/ROI per real, new website user	\$42.21

Website ROI Estimates

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

Incremental trips to Oregon generated by TravelOregon.com: For 1,305,585 real, new website users to TravelOregon.com between January 2019 and February 2020, an estimated 25,255 incremental trips were generated for Oregon. An incremental trip is one in which the visitor decided to visit Oregon based on their experience with the website. These were trips to the state that would not have happened if the website did not exist, and thus any visitor spending in Oregon on these trips can be counted as part of the website's economic impact. The average incremental trip lasted 5.1 days, with a reported in-market spending of \$382.11 per day for each visitor and their immediate party. These incremental trips are estimated to have generated \$48,926,943 in new visitor spending in Oregon.

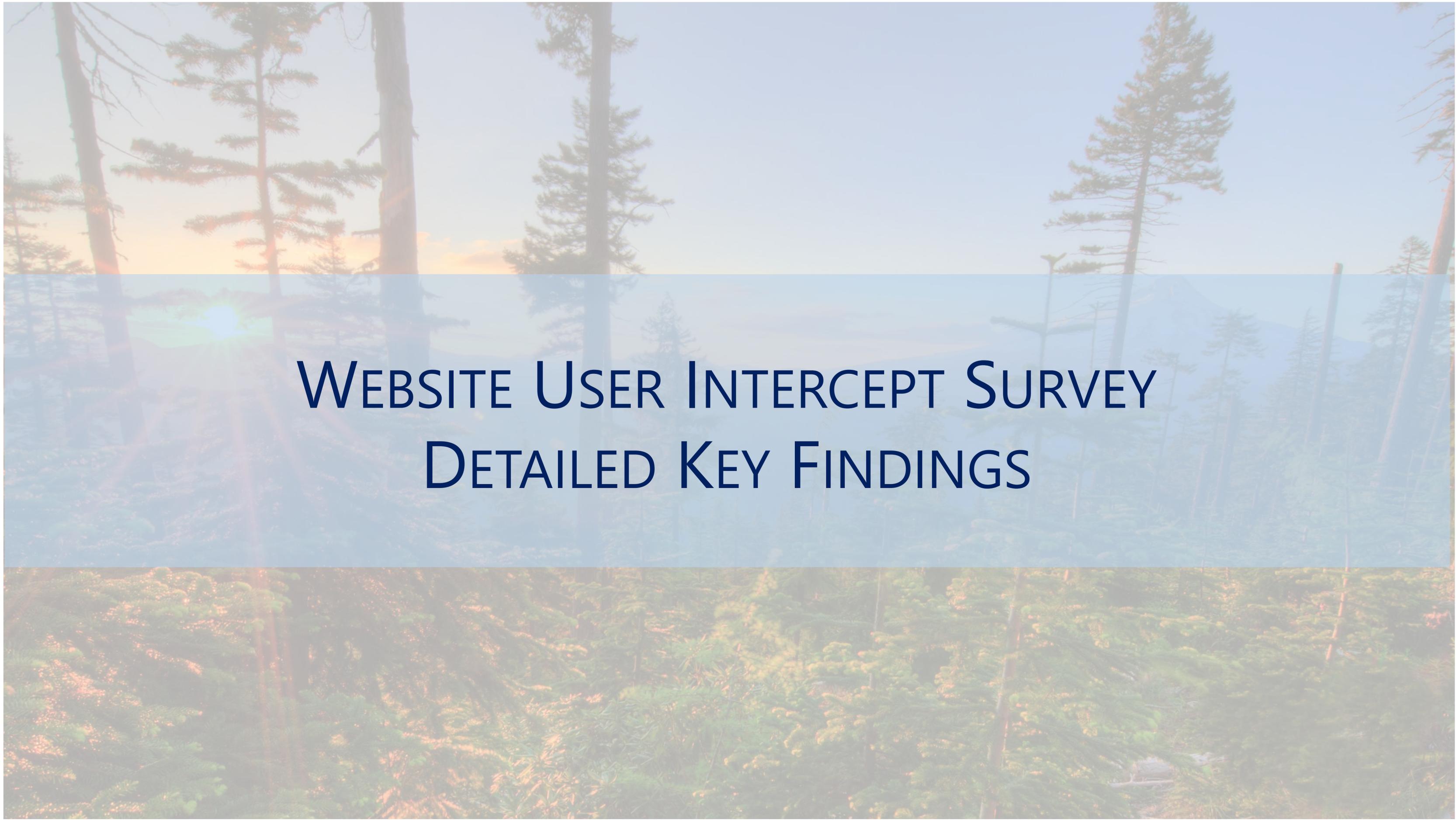
Additional days spent in Oregon generated by TravelOregon.com: A second way TravelOregon.com can generate economic value for Oregon is by convincing visitors to extend their stays. The research conducted shows that for 1,305,585 real, new website users between January 2019 and February 2020, 16,190 new visitor days were generated for Oregon. This results in an additional \$6,186,326 in incremental visitor spending in Oregon.

Total Estimated Economic Impact: 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 1,305,585 real, new website users of TravelOregon.com between January 2019 and February 2020, \$55,113,269 in economic impact was generated for Oregon. Alternatively, every real, new website user to the website led to an additional \$42.21 in incremental visitor spending in Oregon.

Comparative Website ROI Metrics by State Tourism Office

The data table below presents key metrics on the direct spending generated by TravelOregon.com compared to the average metrics of the other 8 state tourism office websites who have concluded data collection efforts as part of this cooperative research study. In order to make these comparisons, the figure of 1,000 real, new website users is the basis for all estimates.

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
TravelOregon.com	19	5.1	\$382.11	\$37,475	12	\$4,738	\$42,213	\$42.21
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
Average for all Participating States	27	4.7	\$393.52	\$50,808	16	\$6,224	\$57,032	\$57.03



WEBSITE USER INTERCEPT SURVEY DETAILED KEY FINDINGS

Website User Intercept Survey—Key Definitions

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

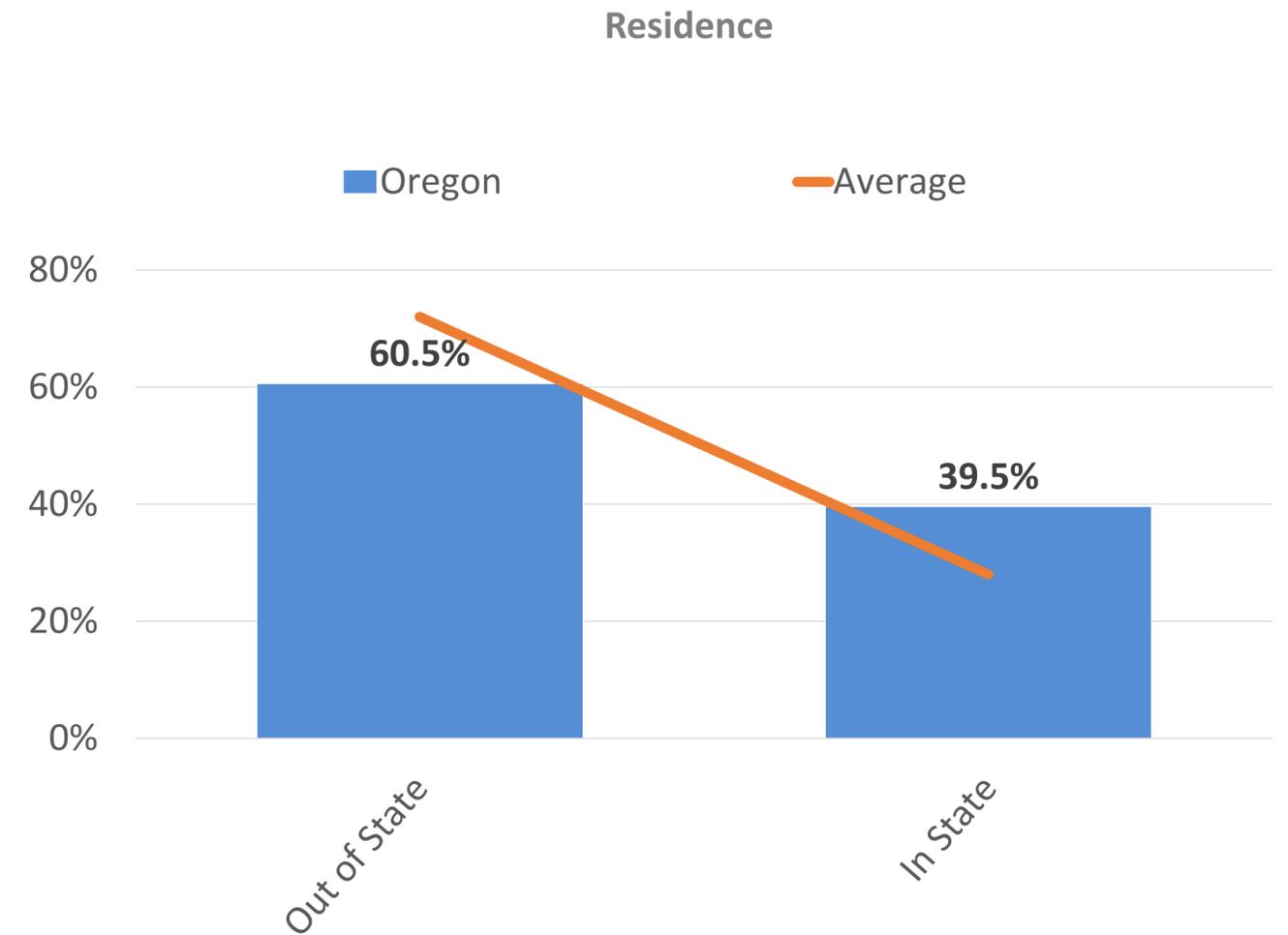
- **Average state website user** - Aggregate data from website users surveyed on all participating STO websites.
- **Out-of-state website user** - A TravelOregon.com Website User Intercept Survey respondent who resides outside the state of Oregon.
- **In-state website user** - TravelOregon.com Website User Intercept Survey respondent who resides inside the state of Oregon.
- **Desktop user** - A respondent who completed the Website User Intercept Survey on a traditional desktop or laptop device.
- **Mobile user** - A respondent who completed the Website User Intercept Survey on a mobile device.



Above: Image of Anthony Lake from @TravelOregon Instagram.

Residence

Approximately 60 percent of TravelOregon.com website users reside outside the state of Oregon. The chart on the right illustrates the percentage of website users surveyed who live in the state of Oregon and those who live outside the state. Approximately 60 percent were non-Oregon residents (60.5%), an important distinction, as only spending in the state by non-residents is potentially counted in the website's ROI estimates. Four-in-ten website users surveyed were Oregon residents (39.5%).



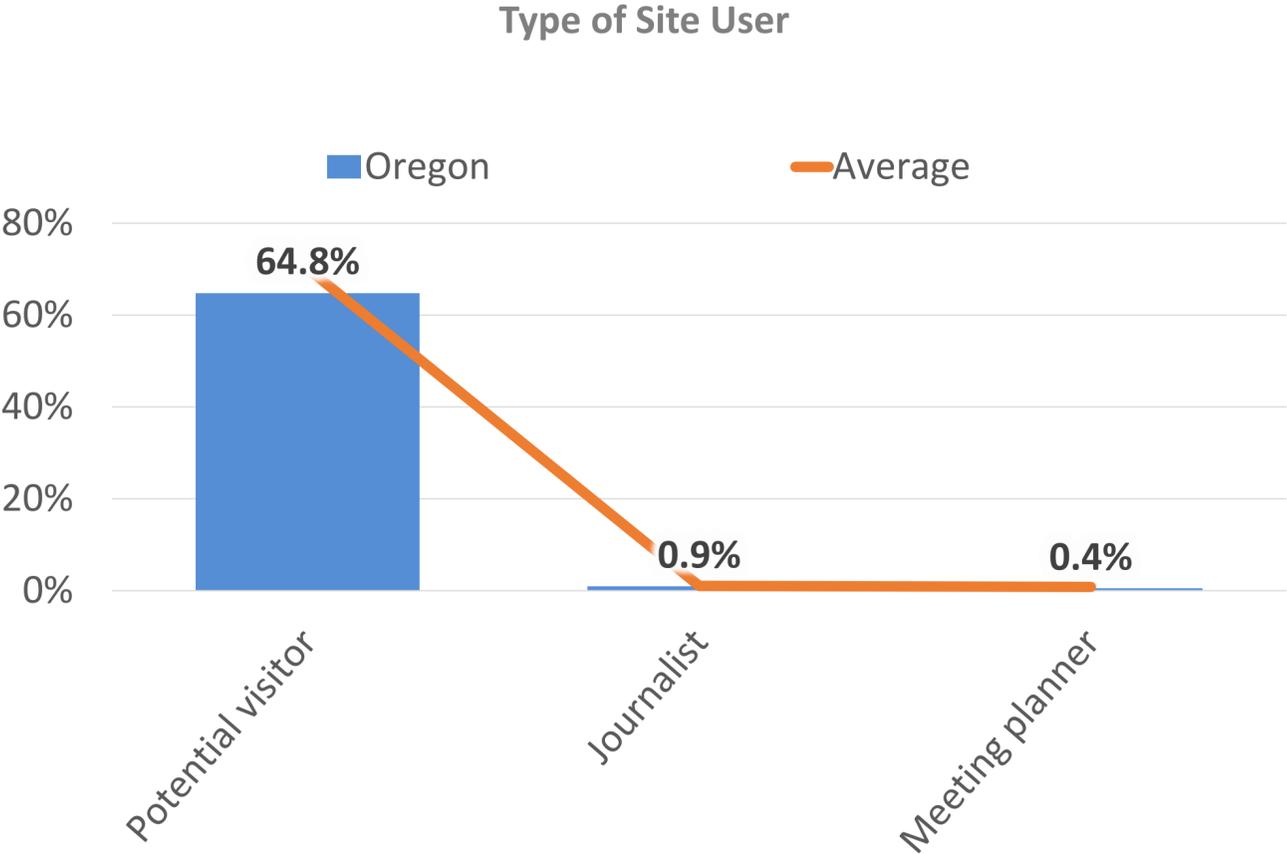
Question: Do you currently live in Oregon?
Base: All respondents; 77,995 responses.

OUT-OF-STATE WEBSITE USERS

The following section presents detailed key findings of the out-of-state TravelOregon.com website user.

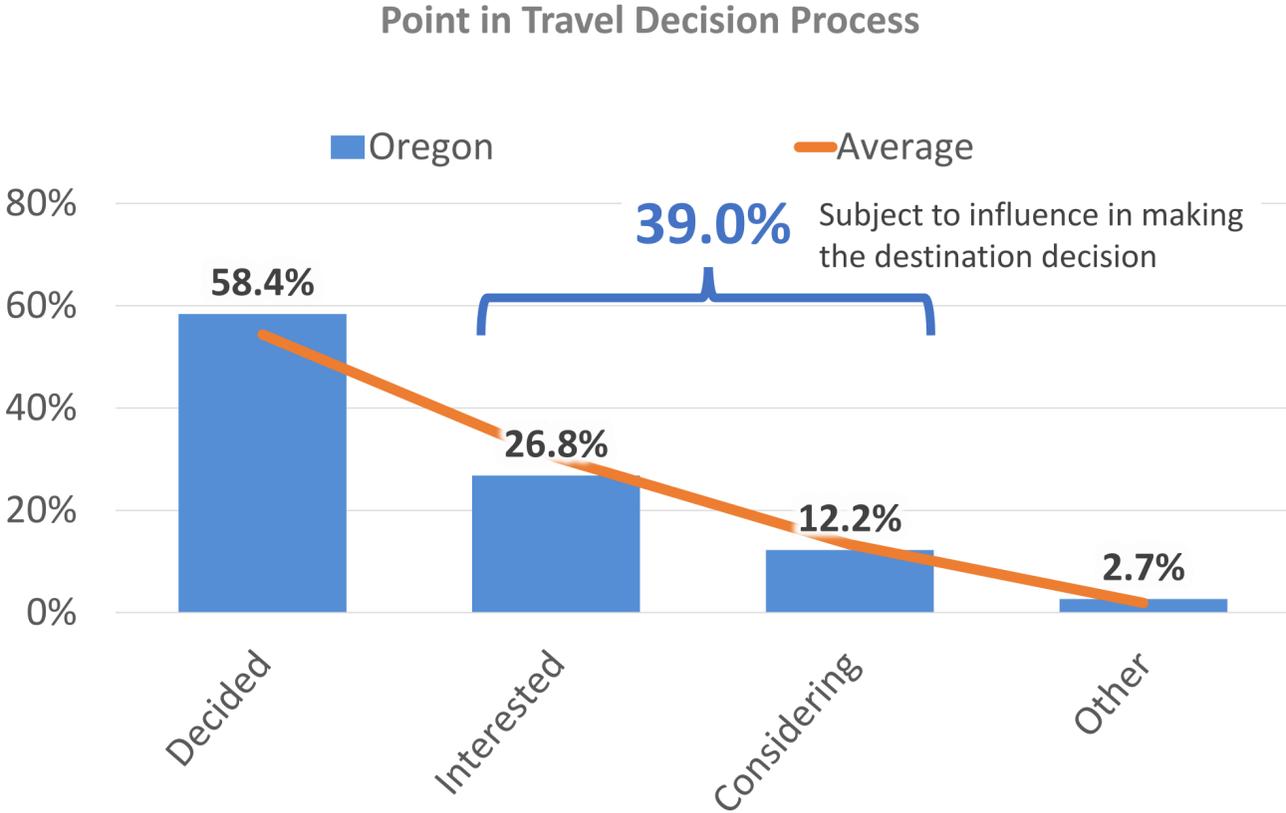
Point in Travel Decision Process

Nearly two-thirds of TravelOregon.com website users who live outside the state reported using the site to gather information for a trip to Oregon (64.8%). Compared to the average out-of-state website user, TravelOregon.com had slightly fewer potential visitors who used the website (64.8% vs. 70.1%).



Question: Which of the following best describes you? (Select one)
 Base: All out-of-state respondents planning a trip; 47,183 responses.

Approximately 40 percent of out-of-state website users gathering trip information on TravelOregon.com could potentially be converted by the website in making the decision to visit Oregon (39.0%). This was similar to the average for all out-of-state website users (43.6%). Over half of TravelOregon.com out-of-state website users had already made up their mind to visit the state when they arrived at the website (58.4%).



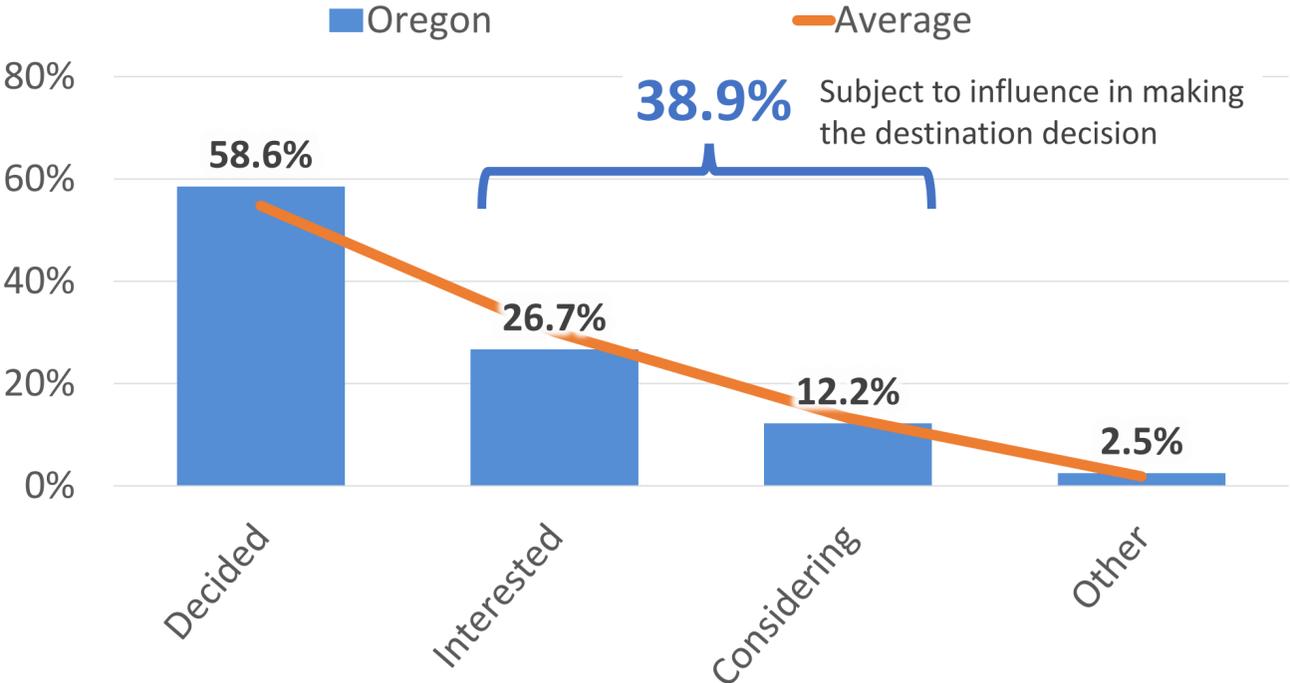
Question: Which best describes where you are in the trip planning process?
 Base: All out-of-state respondents gathering information for a trip; 30,564 responses.

Point in Travel Decision Process—Desktop vs. Mobile Site Users

Similar to all TravelOregon.com out-of-state users, 38.9 percent of out-of-state desktop users gathering trip information could potentially be converted by the website in making the decision to visit Oregon. Nearly six-in-ten users who completed the Website User Intercept Survey on desktop had already made up their mind to visit when they arrived at the website (58.6%).

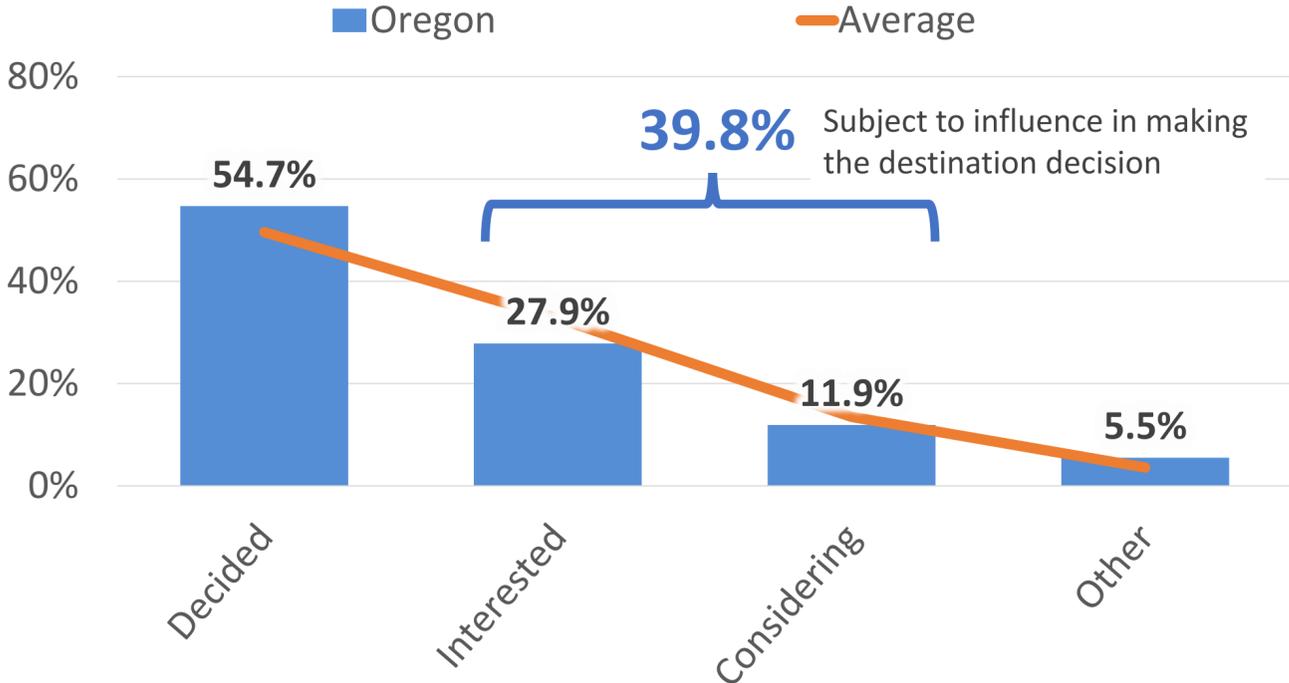
Mobile users were similarly likely to be influenced by the website in making the ultimate decision to visit Oregon. Approximately four-in-ten mobile users were “interested” in or “considering” travel (39.8%) and were therefore subject to influence by TravelOregon.com in making the decision to visit (compared to 38.9% of desktop users). Over half of TravelOregon.com mobile users had already decided to visit before arriving at the website (54.7%).

Point in Travel Decision Process—Desktop Users



Question: Which best describes where you are in the trip planning process?
 Base: Out-of-state respondents gathering information for a trip on desktop; 29,096 responses.

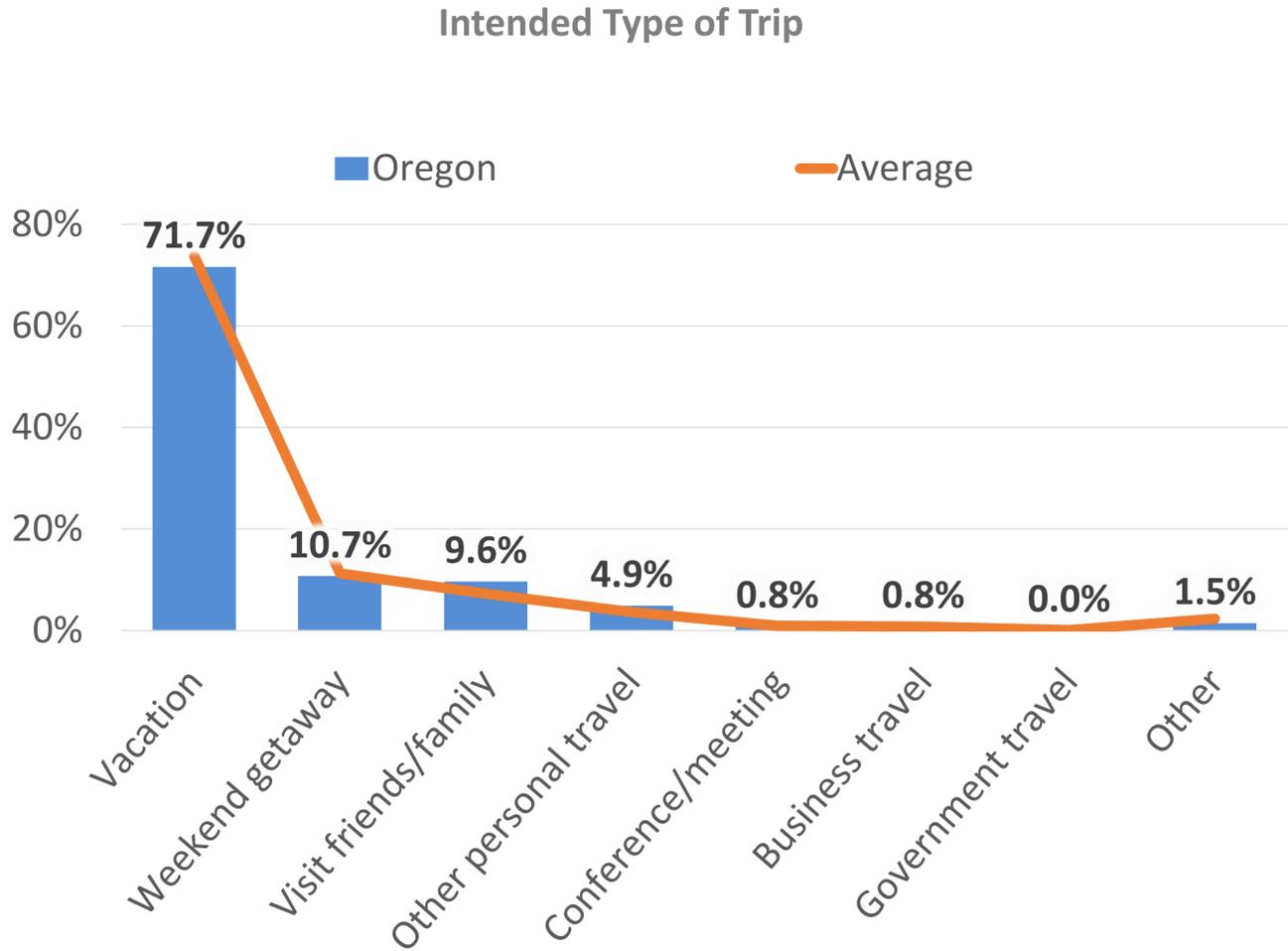
Point in Travel Decision Process—Mobile Users



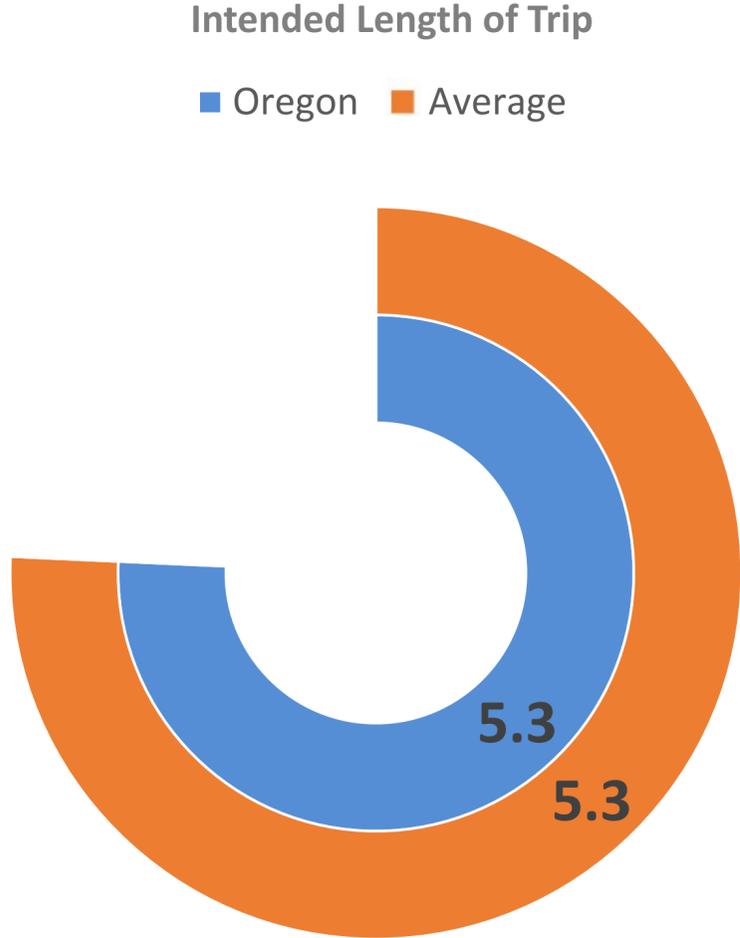
Question: Which best describes where you are in the trip planning process?
 Base: Out-of-state respondents gathering information for a trip on mobile; 1,468 responses.

Intended Type of Trip

A majority of out-of-state website users gathering information for a trip were planning leisure travel (82.4%). In total, 71.7 percent planned to take a vacation and 10.1 percent intended to take a weekend getaway to Oregon. Compared to the average state website user, TravelOregon.com out-of-state users were similarly likely to plan a vacation (71.7% vs. 73.8%) and a weekend getaway (10.7% vs. 11.3%). On average, these website users planned to spend 5.3 days in Oregon.



Question: Which best describes the type of travel to Oregon you are planning or considering? (Select one) Base: All out-of-state respondents gathering information for a trip; 30,591 responses.



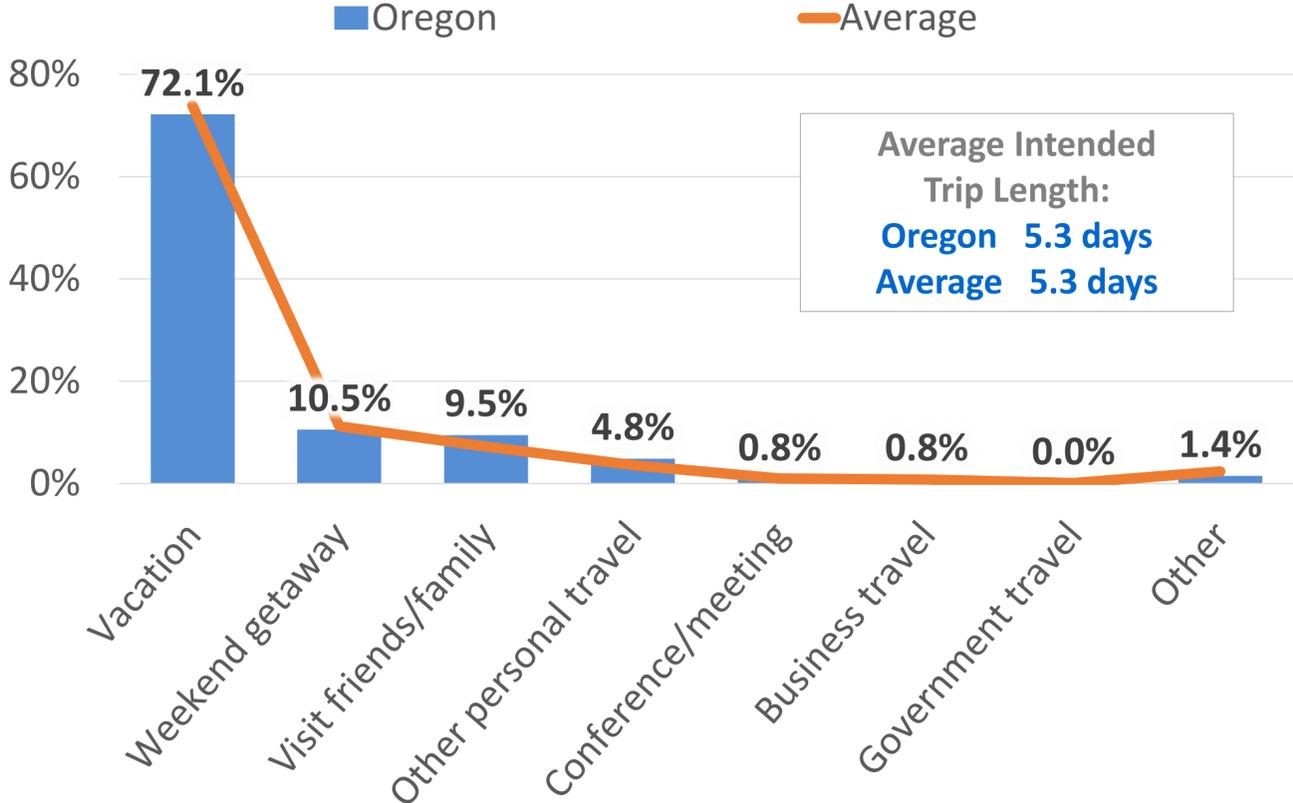
Question: How many days are you likely to stay in Oregon on this planned or potential trip? Base: All out-of-state respondents gathering information for a trip; 30,591 responses.

Intended Type of Trip—Desktop vs. Mobile Site Users

Nearly identical to all users, 82.6 percent of out-of-state desktop website users gathering trip information were planning or considering travel to Oregon for personal leisure purposes. In total, 72.1 percent characterized their intended trip as a vacation, while 10.5 percent described their trip as a weekend getaway.

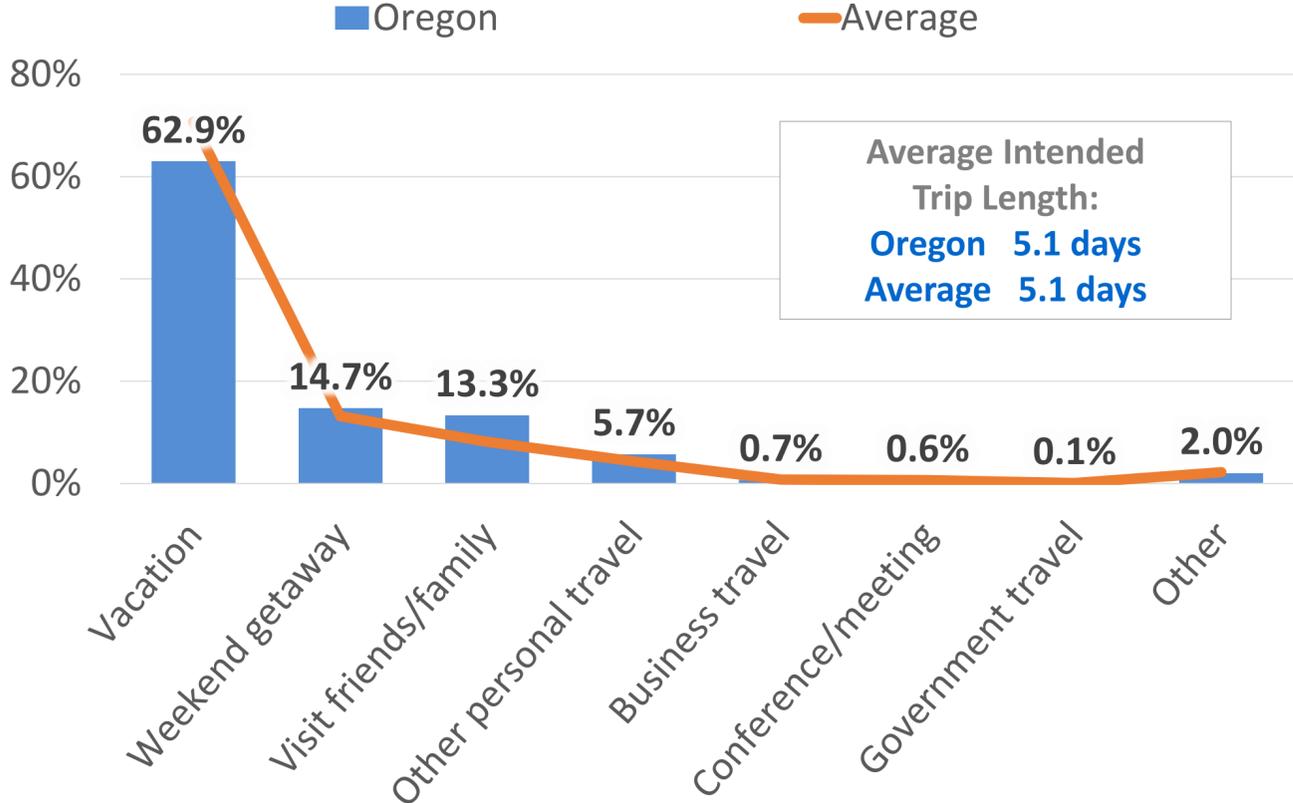
A slightly smaller percentage of mobile device users were considering leisure travel to Oregon compared to desktop users (77.6% vs. 82.6%). Mobile users were less likely to be planning a vacation (62.9% vs. 72.1% desktop users) but more likely to be planning a weekend getaway (14.7% compared to 10.5% of desktop users).

Intended Type of Trip—Desktop Users



Question: Which best describes the type of travel to Oregon you are planning or considering? (Select one) How many days are you likely to stay in Oregon on this planned or potential trip?
 Base: Out-of-state respondents gathering information for trip on desktop; 29,119 responses.

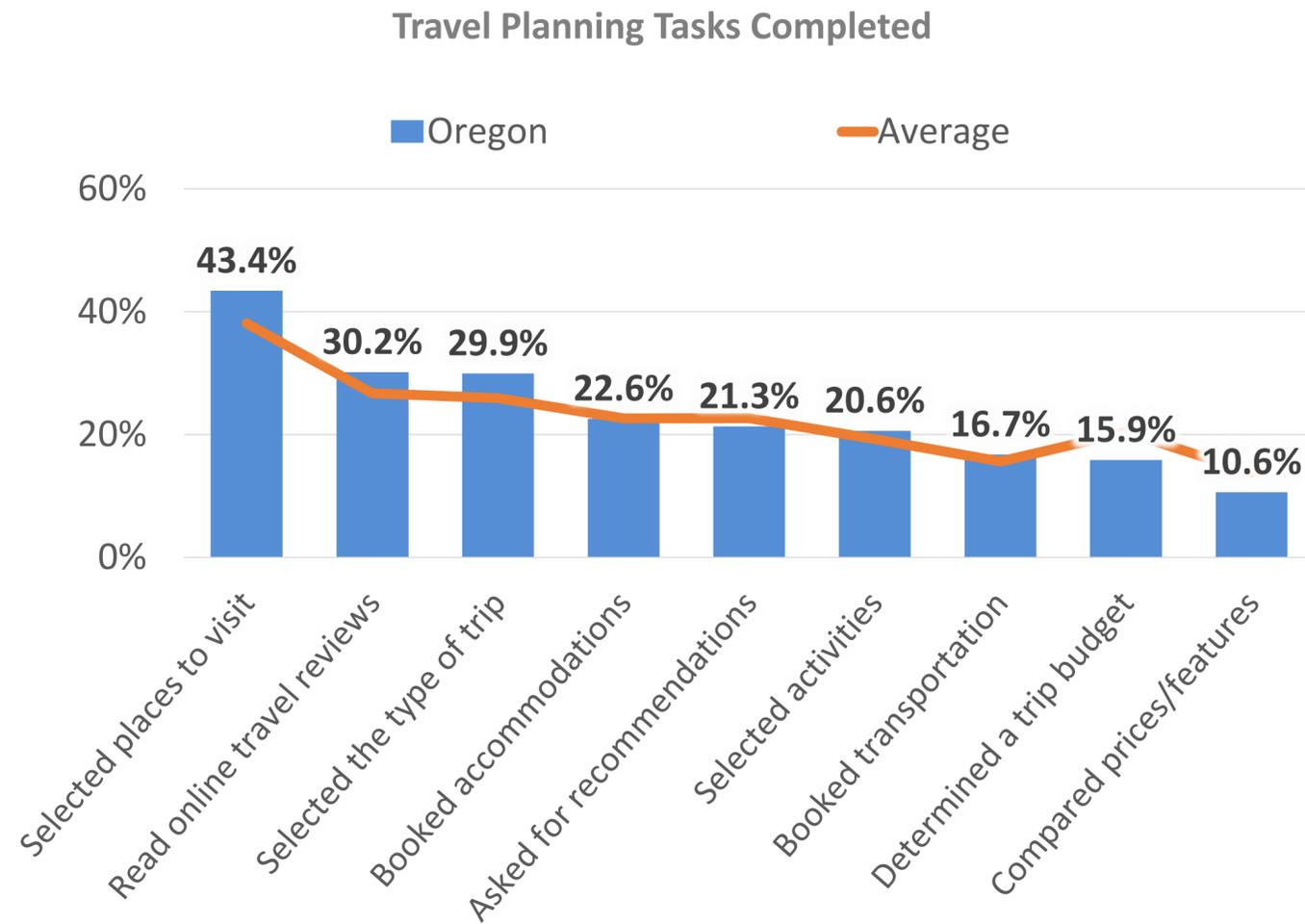
Intended Type of Trip—Mobile Users



Question: Which best describes the type of travel to Oregon you are planning or considering? (Select one) How many days are you likely to stay in Oregon on this planned or potential trip?
 Base: Out-of-state respondents gathering information for a trip on mobile; 1,472 responses.

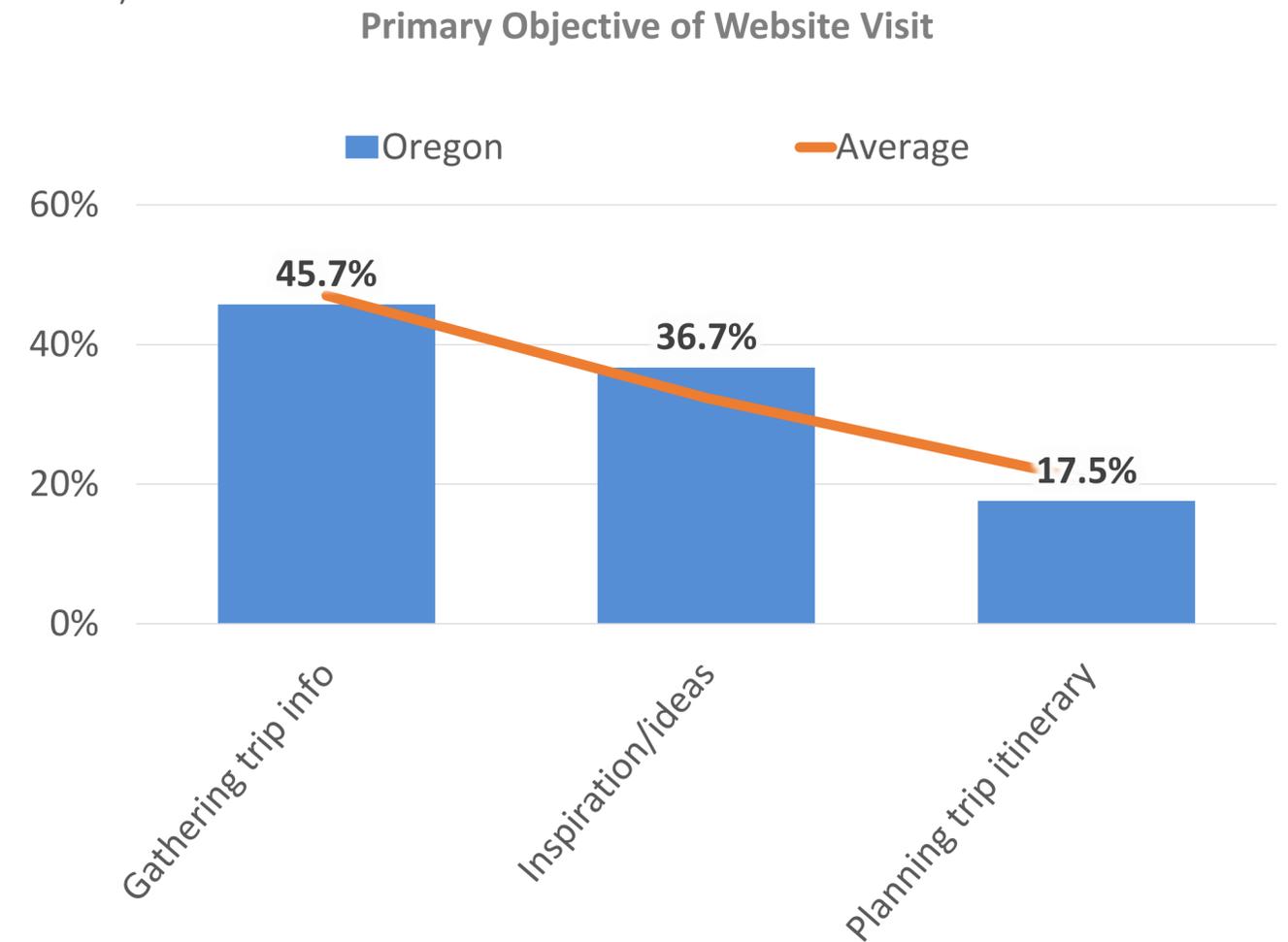
Travel Planning Tasks Completed & Primary Objective of Website Visit

Over 40 percent of all TravelOregon.com out-of-state website users had already selected places to visit on their trip (43.4%). Other travel planning tasks completed were reading online travel reviews (30.2%), selecting the type of trip experience to focus on (29.9%), booking accommodations (22.6%), asking for recommendations or advice (21.3%) and/or selecting activities (20.6%).



Question: Which of the following have you already done for this planned or potential trip? (Select all that apply) Base: All out-of-state respondents gathering information for a trip; 25,649 responses.

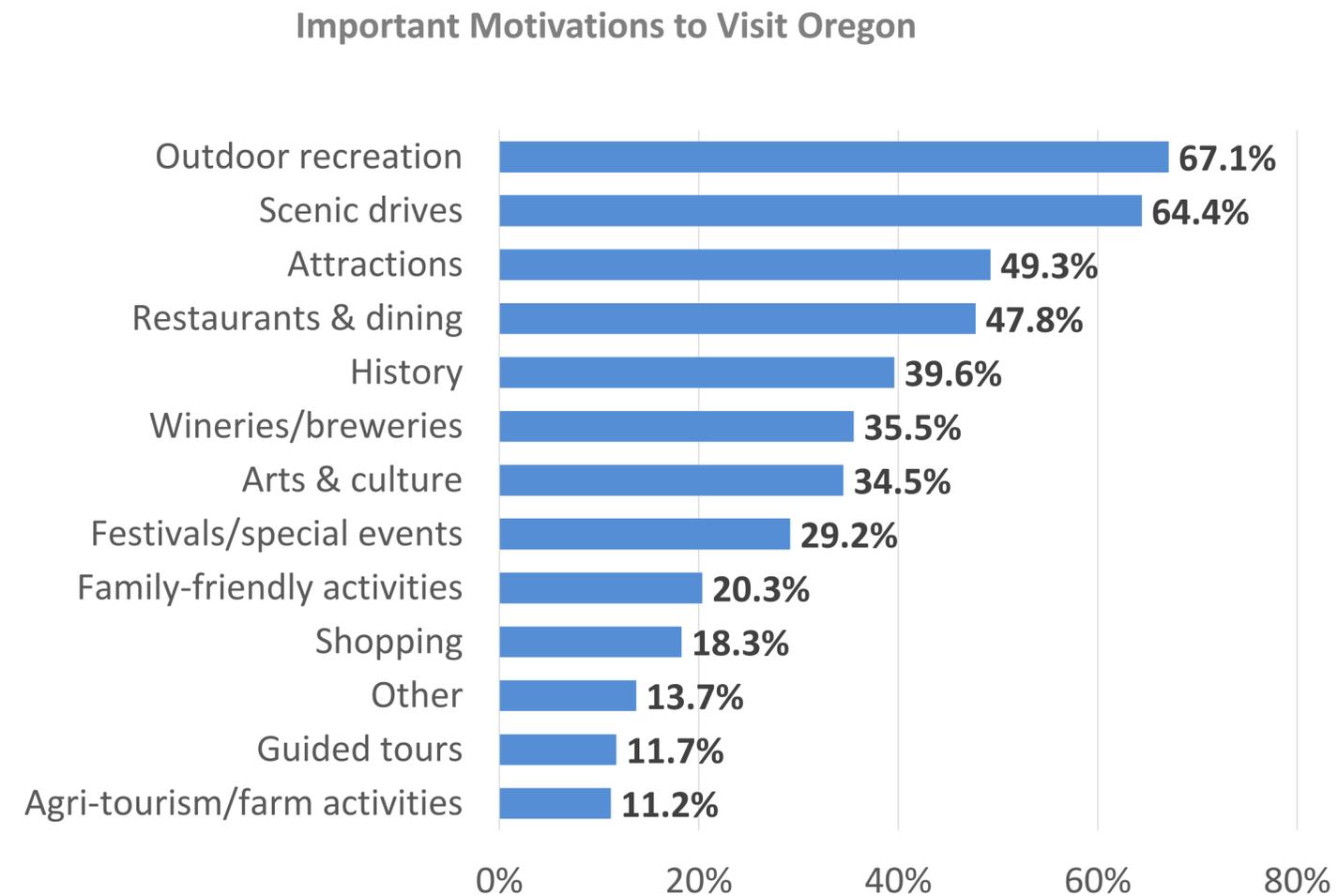
The primary objective of using TravelOregon.com was to gather information on specific places to go and things to do (45.7%). This was followed by over one-third who were searching for inspiration/travel ideas (36.7%) and nearly one-in-five who were using the website to compare features of places to go and/or things to do for their trip itinerary (17.5%). Compared to the average out-of-state website user, TravelOregon.com had slightly more potential visitors who primarily used the website for inspiration/travel ideas (36.7% vs. 32.3%).



Question: Which best describes your primary objective for using our website? (Select one) Base: All out-of-state respondents gathering information for a trip; 30,589 responses.

Custom Question: Important Motivations to Visit Oregon

Outdoor recreation (67.1%) and/or scenic drives (64.4%) were most important to out-of-state website users' interest in visiting the state. In addition to outdoor recreation and scenic drives, nearly half of potential visitors rated attractions (49.3%) and/or restaurants/dining (47.8%) as important to their interest in visiting Oregon. One-third or more out-of-state potential visitors said history (39.6%), wineries/breweries (35.5%) and/or arts/culture (34.5%) were important motivators to visit Oregon.



Question: Which of the following are important to your interest in visiting or traveling within Oregon? (Select all that apply)

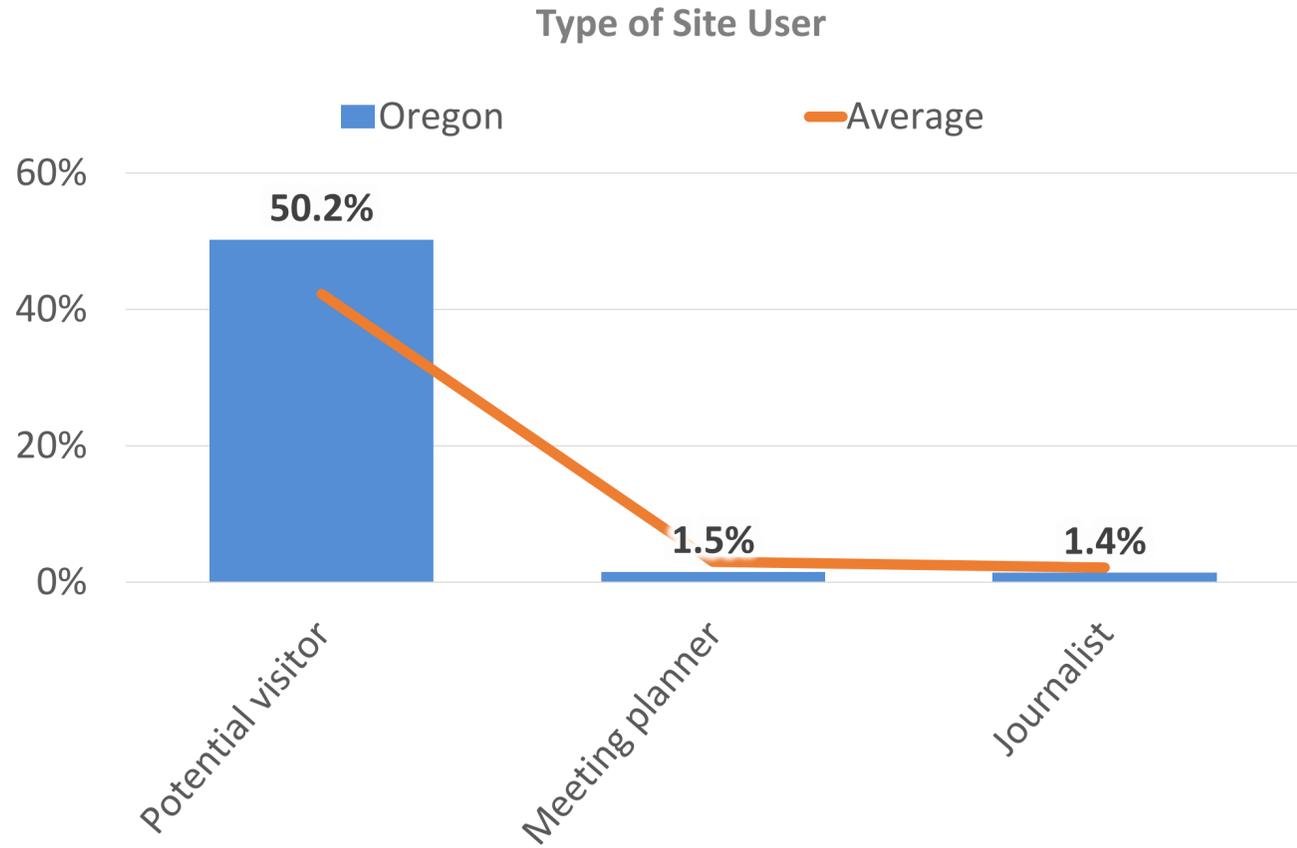
Base: All out-of-state respondents gathering information for a trip; 37,594 responses.

IN-STATE WEBSITE USERS

The following section presents detailed key findings of the in-state TravelOregon.com website user.

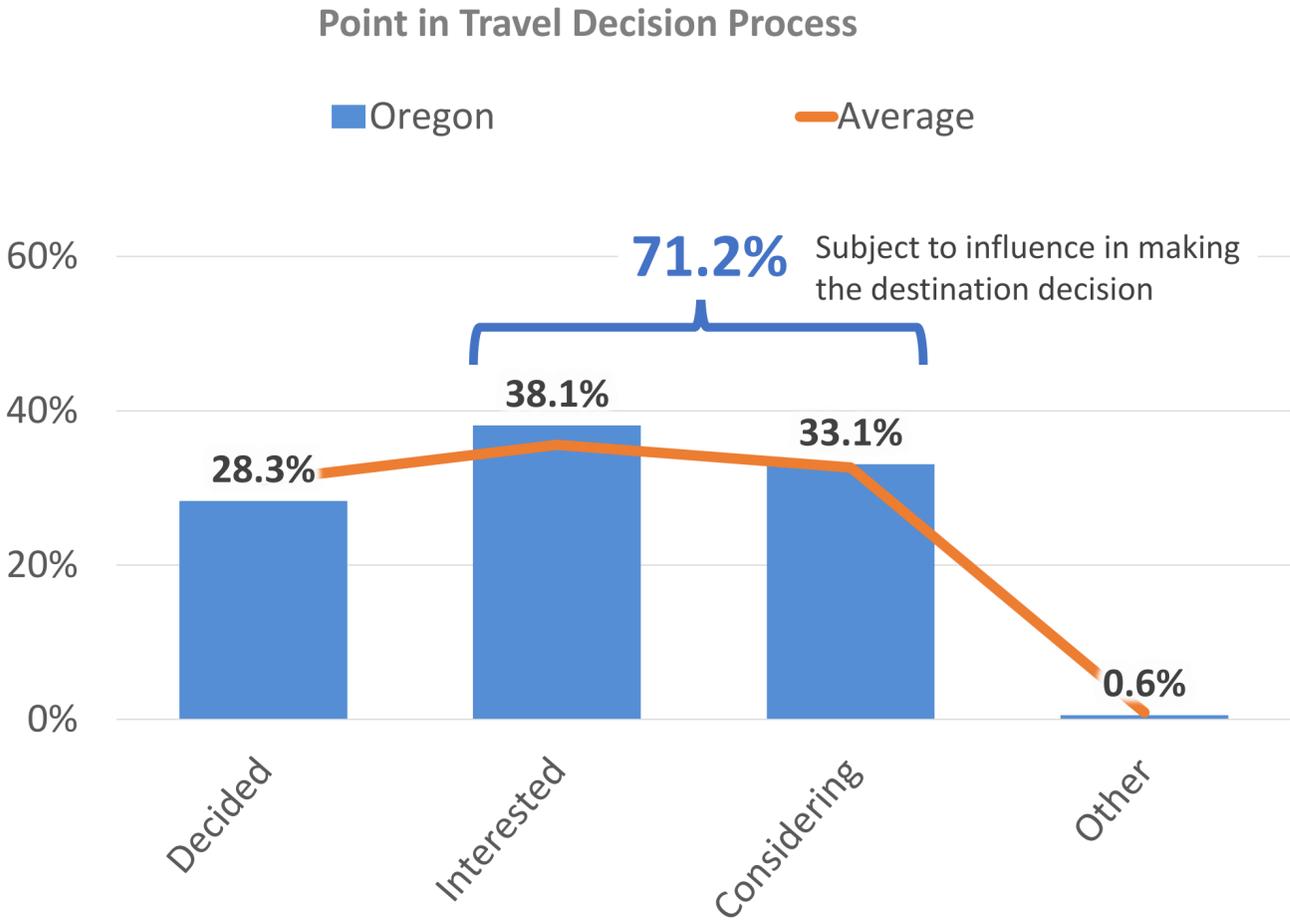
Point in Travel Decision Process

Half of TravelOregon.com website users who were residents of the state reported using the site to gather information for a trip within Oregon (50.2%). Compared to the average in-state website user, TravelOregon.com has a slightly larger share of potential visitors who used the website (50.2% vs. 42.3%).



Question: Which of the following best describes you? (Select one)
 Base: All in-state respondents planning a trip; 30,794 responses.

A majority of in-state website users gathering trip information on TravelOregon.com could potentially be converted by the website in making the decision to travel within Oregon (71.2%). This is similar to the average for all in-state website users, in which 68.2 percent were potentially convertible. Over one-quarter of TravelOregon.com in-state website users had already made up their mind to take a trip when they arrived at the website (28.3%).



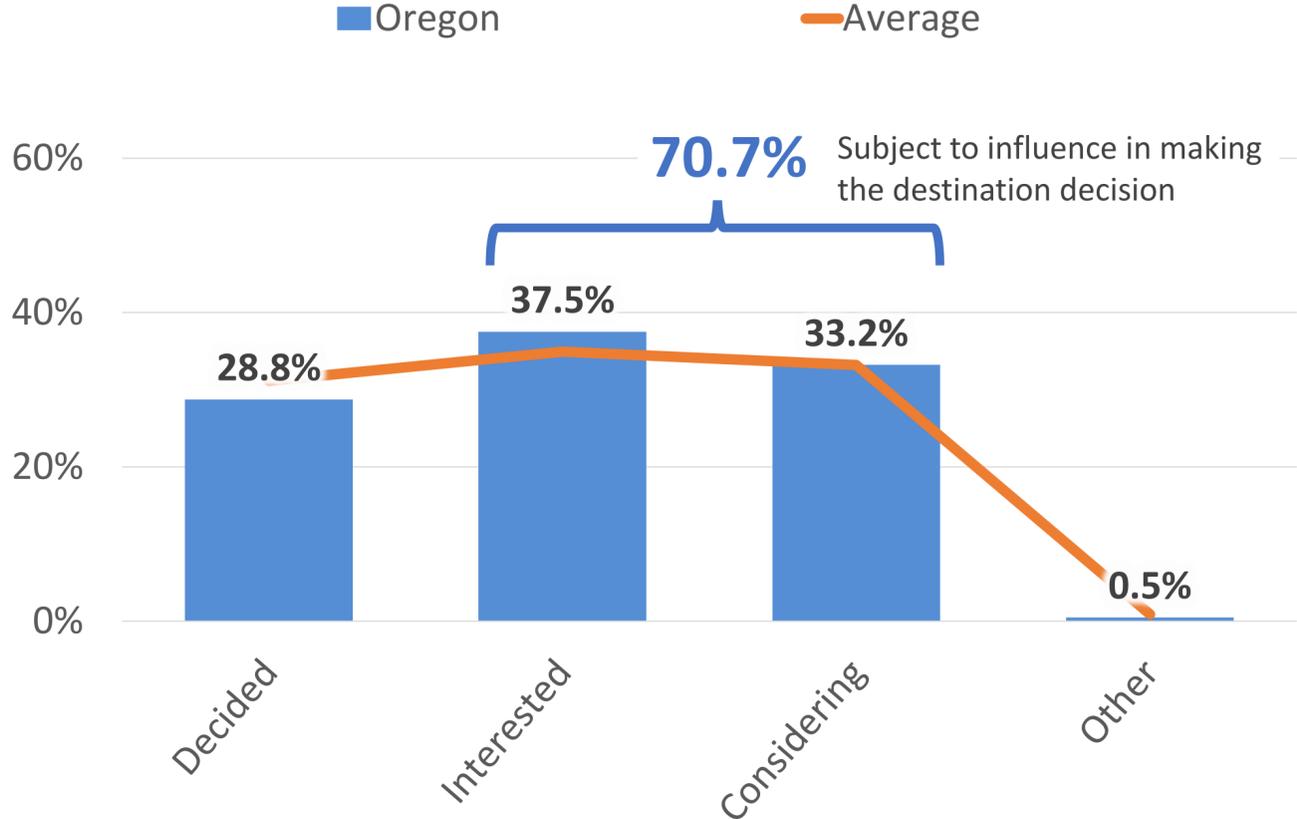
Question: Which best describes where you are in the trip planning process?
 Base: All in-state respondents gathering information for a trip; 15,464 responses.

Point in Travel Decision Process—Desktop vs. Mobile Site Users

Similar to all TravelOregon.com users, 70.7 percent of in-state desktop users gathering trip information could potentially be converted by the website in making the decision to take a trip within Oregon. Nearly three-in-ten in-state respondents who completed the Website User Intercept Survey on desktop had already made up their mind to take a trip when they arrived at the website (28.8%).

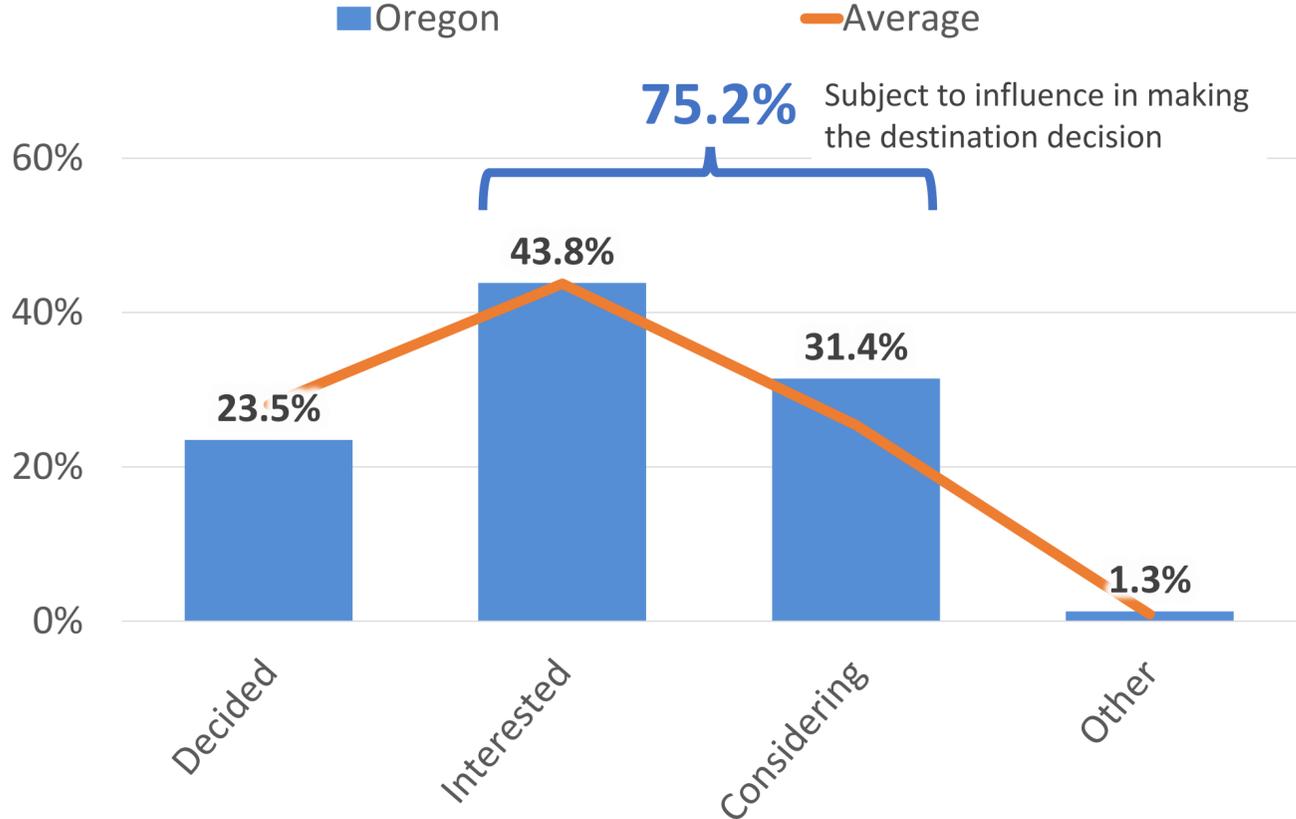
Mobile users were more likely to be influenced by the website in making the ultimate decision to travel within Oregon. Three-quarters of in-state mobile users were “interested” or “considering” travel, and therefore potentially convertible by TravelOregon.com into a visitor (75.2% mobile vs. 70.7% desktop). Approximately one-quarter of in-state mobile users had already decided to take a trip within Oregon before visiting the site (23.5%).

Point in Travel Decision Process—Desktop Users



Question: Which best describes where you are in the trip planning process?
 Base: In-state respondents gathering information for a trip on desktop; 14,131 responses.

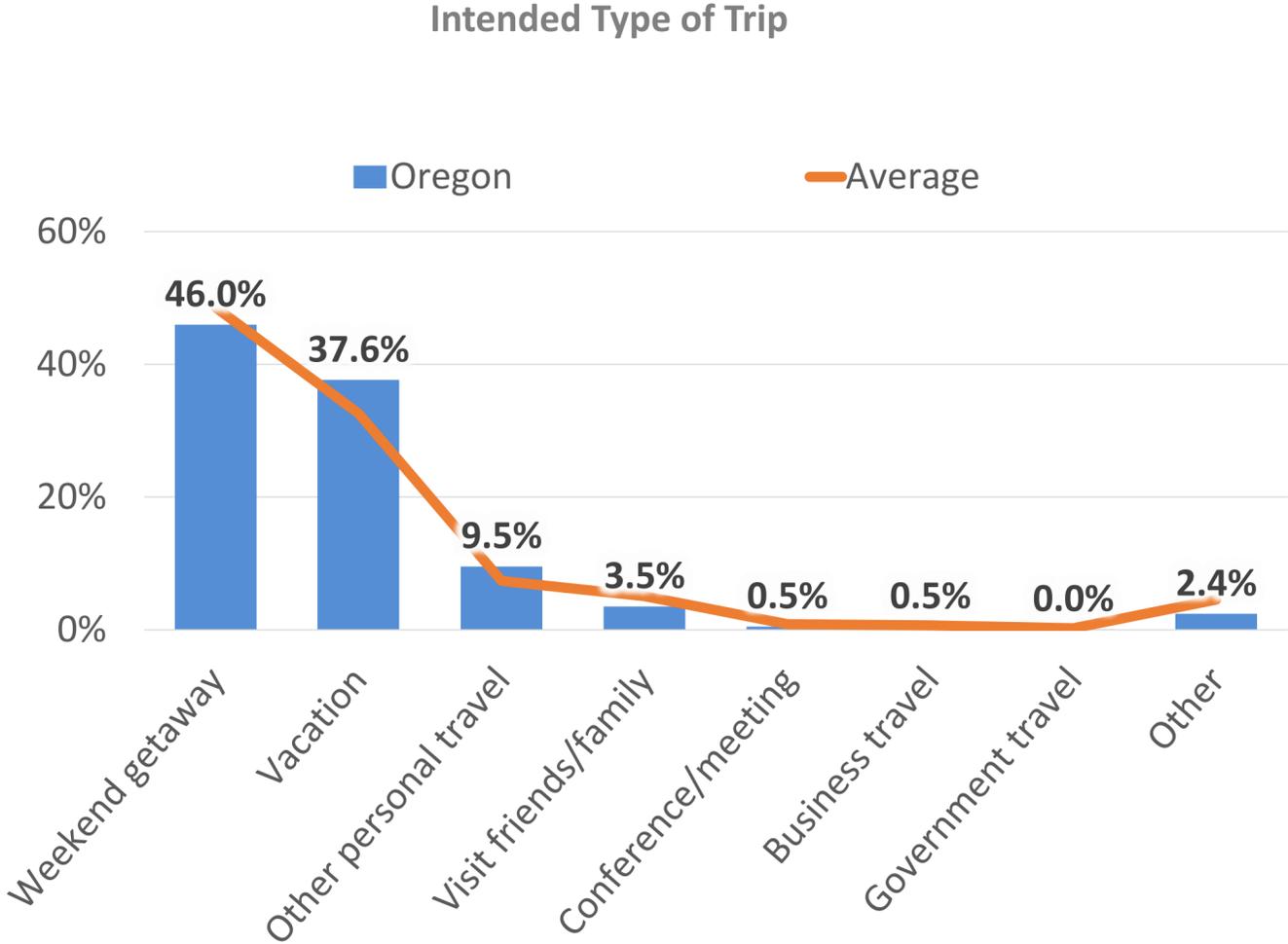
Point in Travel Decision Process—Mobile Users



Question: Which best describes where you are in the trip planning process?
 Base: In-state respondents gathering information for a trip on mobile; 1,333 responses.

Intended Type of Trip

A majority of in-state website users gathering information for a trip were planning leisure travel (83.6%). Nearly half planned to take a weekend getaway within Oregon (46.0%), while over one-third intended to take a vacation (37.6%). Compared to the average state website user, TravelOregon.com in-state users were more likely to plan a vacation (37.6% vs. 32.6%) and slightly less likely to plan a weekend getaway (46.0% vs. 48.6%). On average, these in-state website users planned to spend 3.6 days on their trip, similar to 3.5 days on average for all state website users.



Question: Which best describes the type of travel within Oregon you are planning or considering? (Select one) Base: All in-state respondents gathering information for a trip; 15,489 responses.

Intended Length of Trip



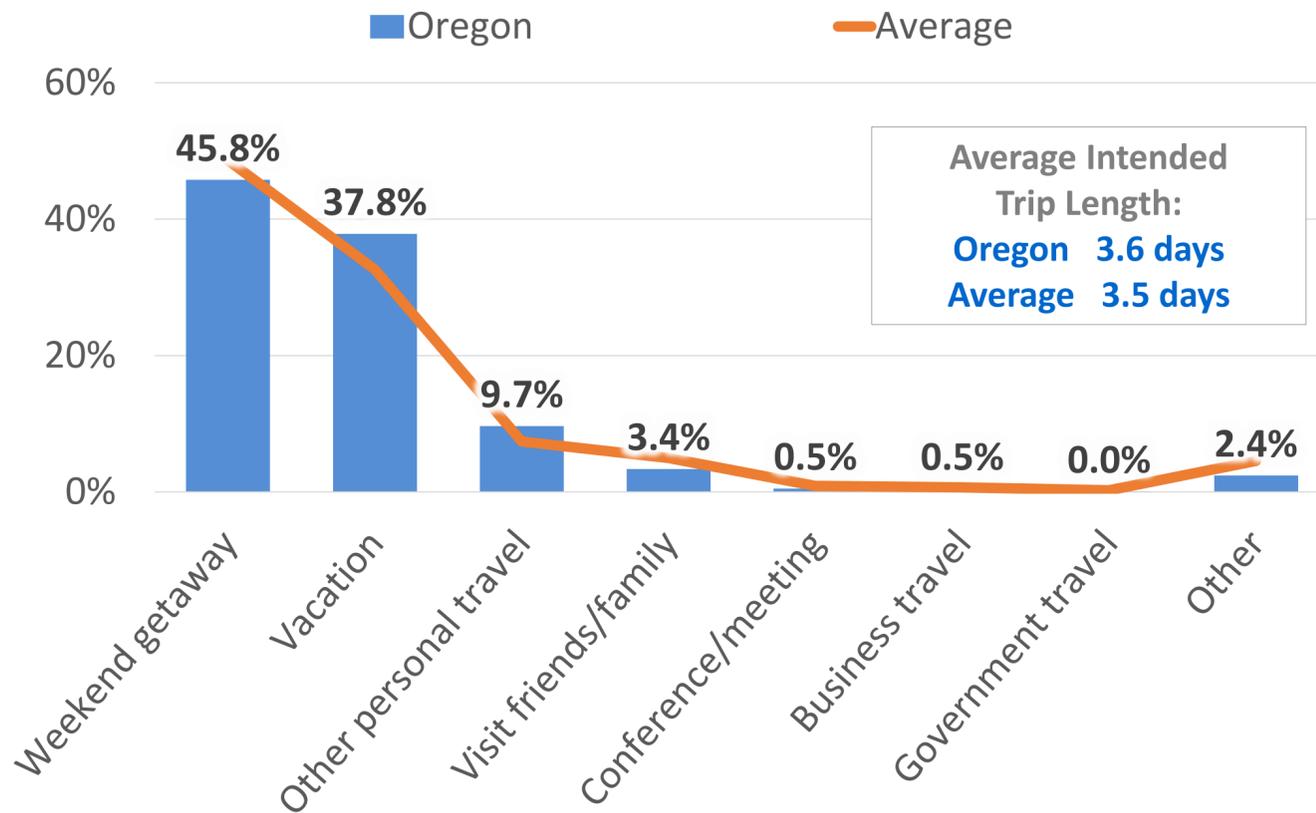
Question: How many days are you likely to stay in Oregon on this planned or potential trip? Base: All in-state respondents gathering information for a trip; 15,488 responses.

Intended Type of Trip—Desktop vs. Mobile Site Users

Identical to all TravelOregon.com in-state users, 83.6 percent of in-state desktop website users gathering trip information were planning or considering travel within Oregon for personal leisure purposes. In total, 45.8 percent characterized their intended trip as a weekend getaway, while 37.8 percent described their trip as a vacation.

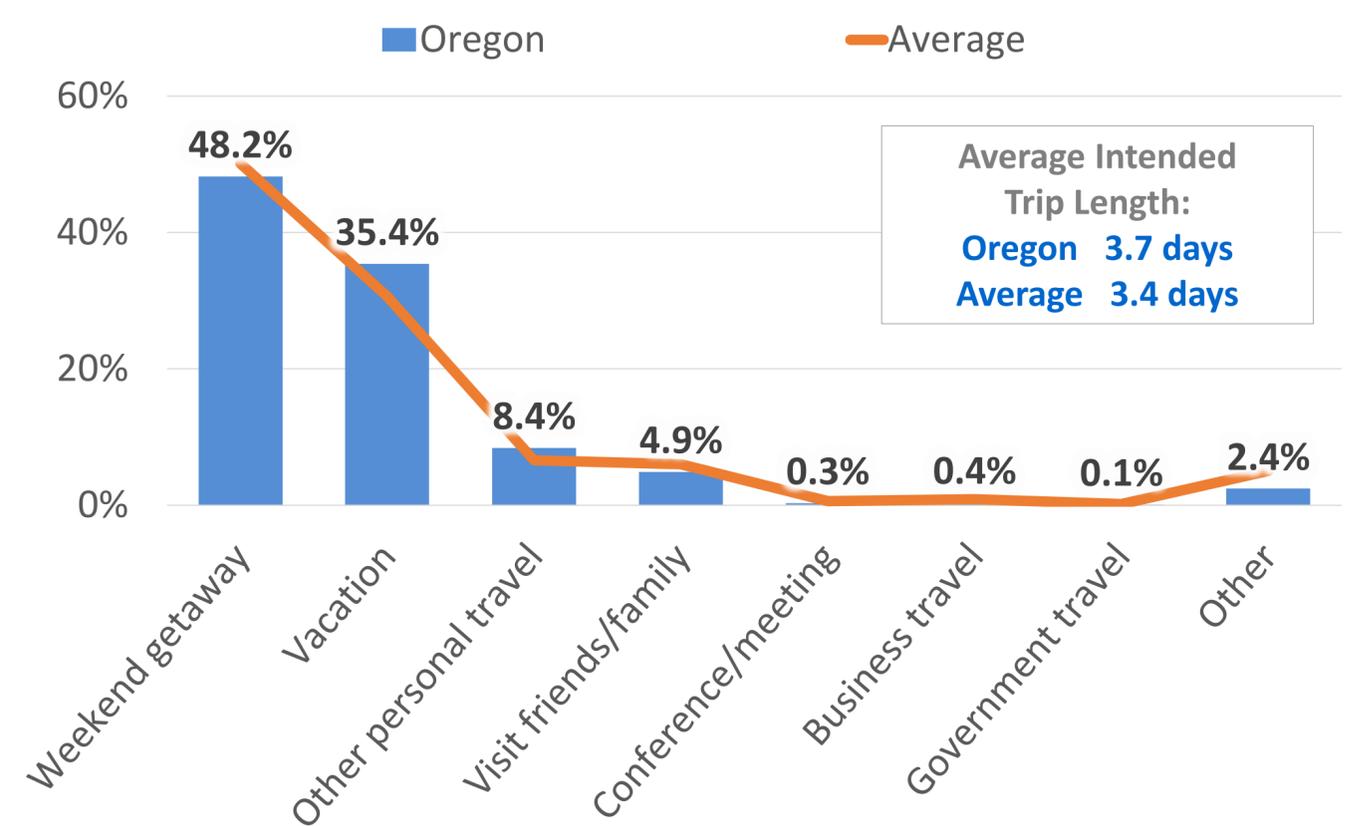
Compared to in-state desktop users, an equal proportion of in-state mobile users were likely to consider leisure travel to Oregon (83.6%). Nearly half of all mobile users were planning a vacation (48.2% vs. 45.8% desktop users), while 35.4 percent were slightly less apt to plan a weekend getaway (compared to 37.8% for desktop users).

Intended Type of Trip—Desktop Users



Question: Which best describes the type of travel within Oregon you are planning or considering? (Select one) How many days are you likely to stay in Oregon on this planned or potential trip? Base: In-state respondents gathering information for a trip on desktop; 14,155 responses.

Intended Type of Trip—Mobile Users



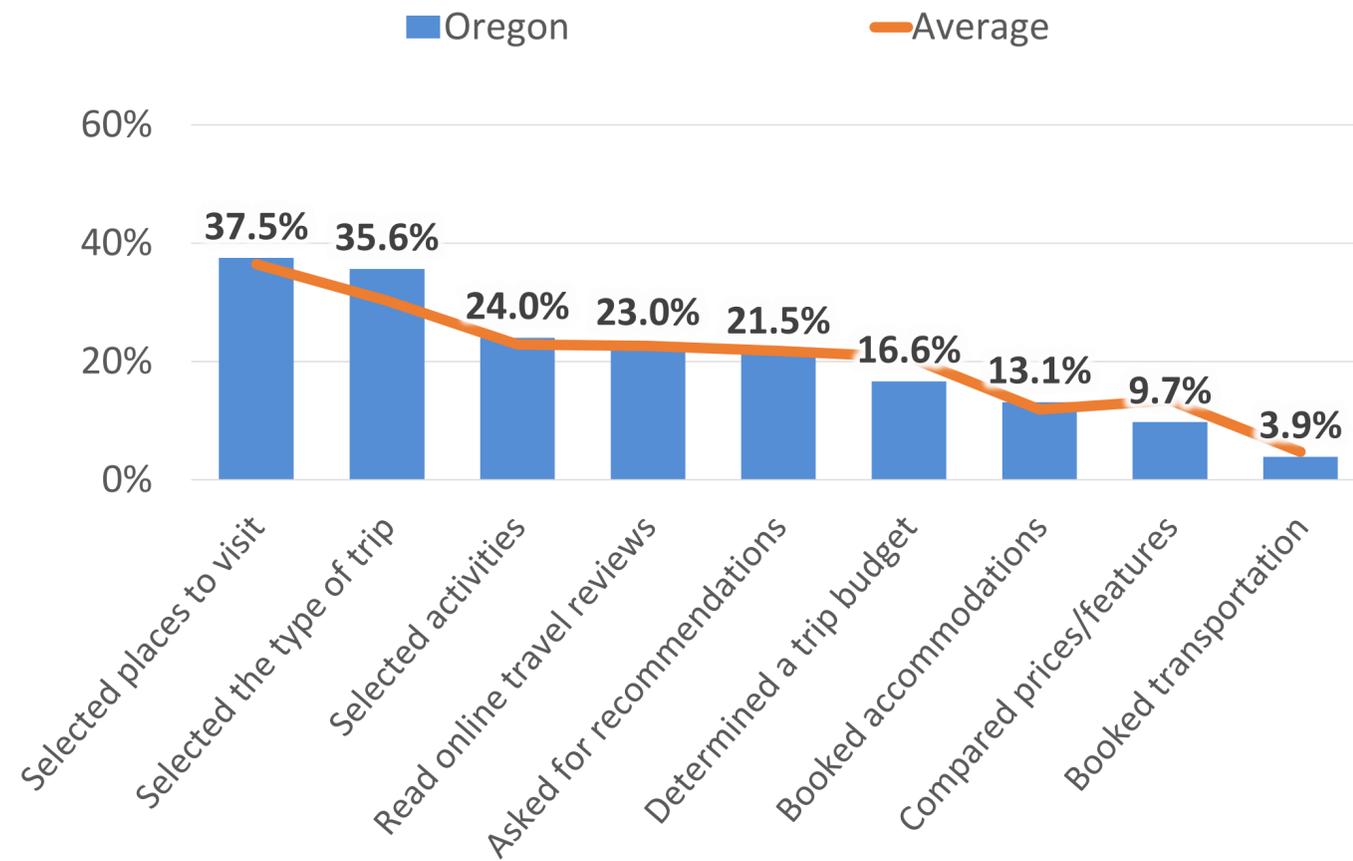
Question: Which best describes the type of travel within Oregon you are planning or considering? (Select one) How many days are you likely to stay in Oregon on this planned or potential trip? Base: In-state respondents gathering information for a trip on mobile; 1,334 responses.

Travel Planning Tasks Completed & Primary Objective of Website Visit

One-third or more of all in-state website users have already selected places to visit (37.5%) and/or selected the type of trip experience to focus on (35.6%). Other travel planning tasks completed include selecting activities (24.0%), reading online travel reviews (23.0%) and/or asking for recommendations/advice (21.5%) by one-in-five or more potential in-state visitors.

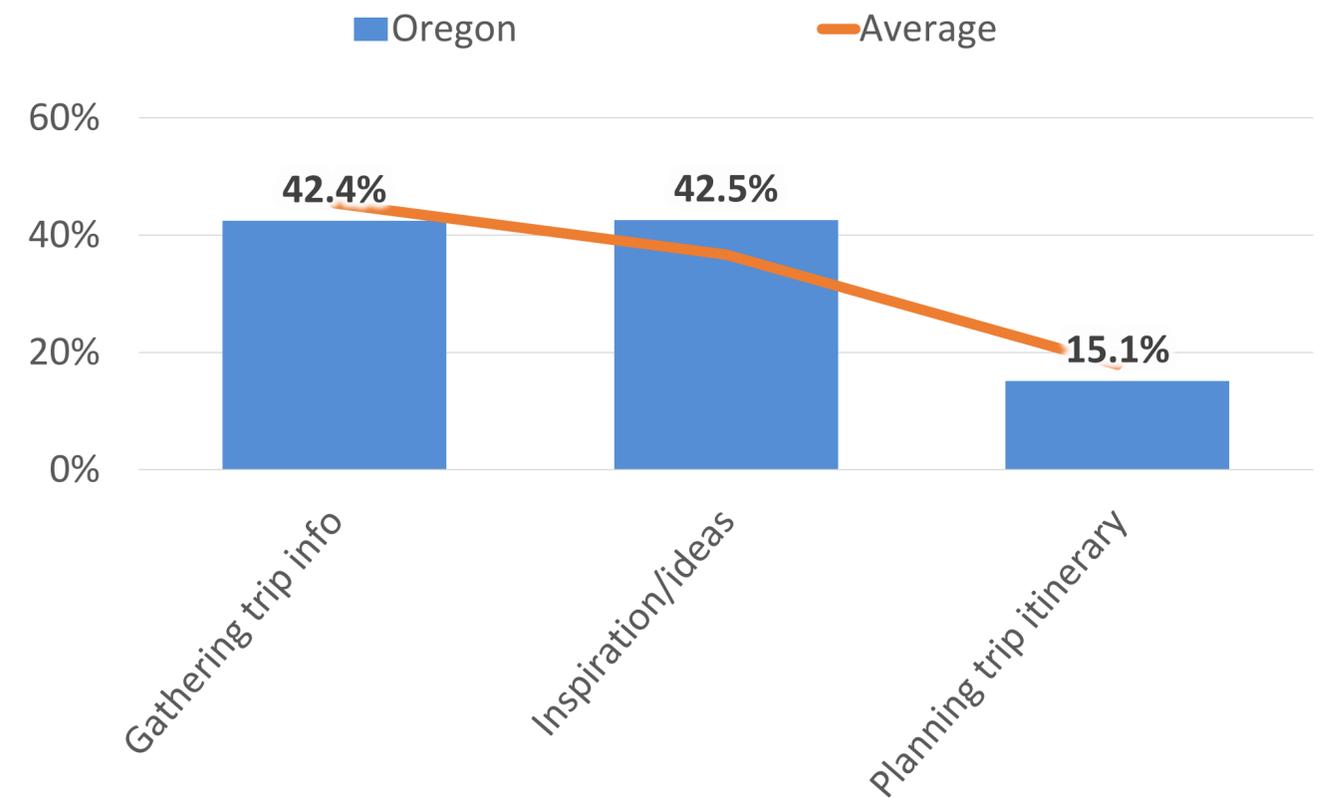
The primary objectives of using TravelOregon.com were to search for inspiration/travel ideas (42.5%) and gather information on places to go/things to do (42.4%). This was followed by 15.1 percent who were using the website to plan their trip itinerary. Compared to the average in-state website user, TravelOregon.com had more potential visitors who primarily used the website for inspiration/travel ideas (42.5% vs. 36.7%).

Travel Planning Tasks Completed



Question: Which of the following have you already done for this planned or potential trip? (Select all that apply) Base: All in-state respondents gathering information for a trip; 12,945 responses.

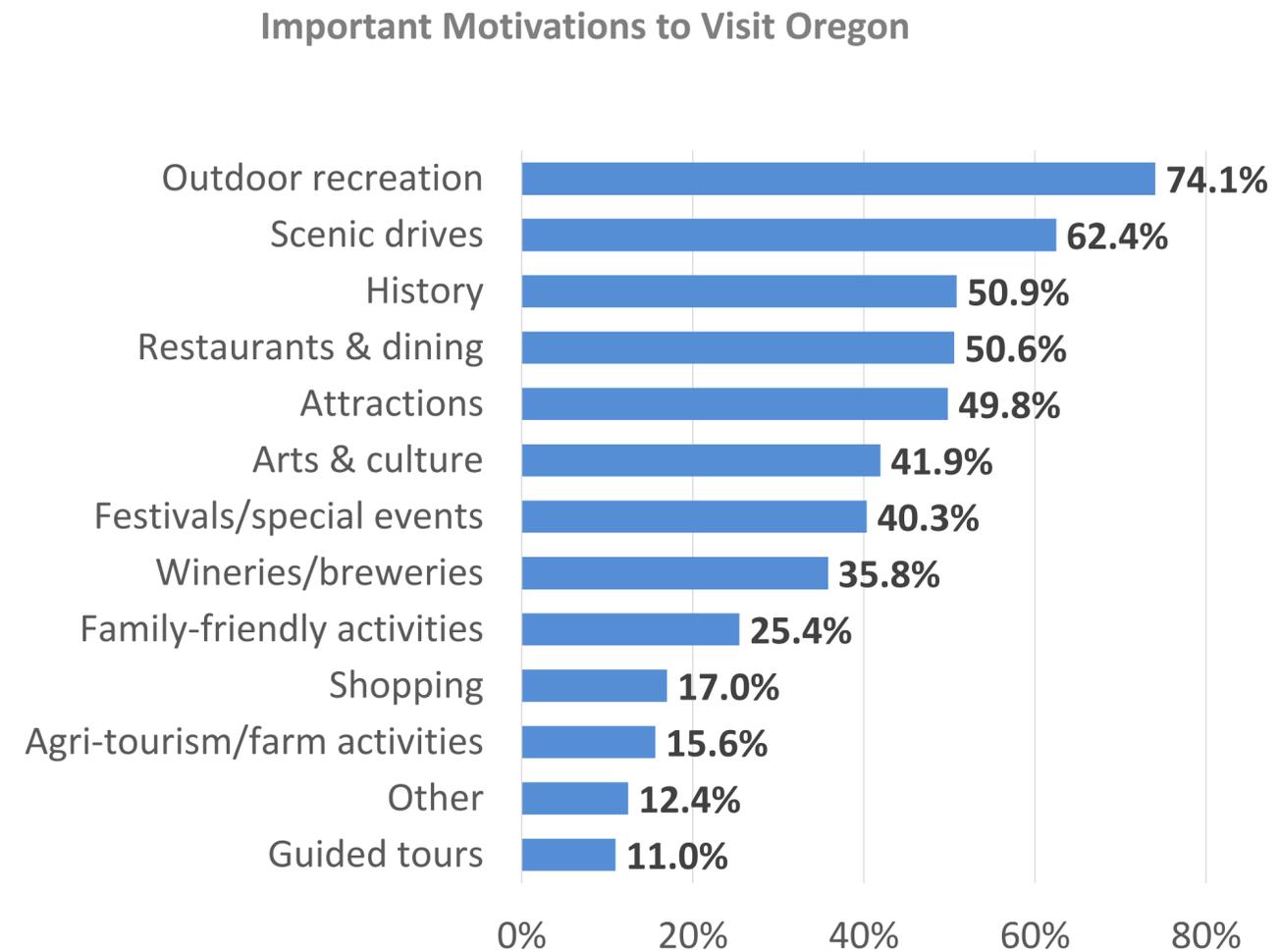
Primary Objective of Website Visit



Question: Which best describes your primary objective for using our website? (Select one) Base: All in-state respondents gathering information for a trip; 7,049 responses.

Custom Question: Important Motivations to Visit Oregon

Outdoor recreation (74.1%) and/or scenic drives (62.4%) were most important to in-state website users' interest in traveling within Oregon. In addition, to outdoor recreation and scenic drives, history (50.9%), restaurants/dining (50.6%) and/or attractions (49.8%) were also important to the interest in traveling within the state. One-third or more potential visitors shared that arts/culture (41.9%), festivals/special events (40.3%) and/or wineries/breweries (35.8%) were important motivators to travel within Oregon.



Question: Which of the following are important to your interest in visiting or traveling within Oregon? (Select all that apply)

Base: All in-state respondents gathering information for a trip; 25,177 responses.



WEBSITE USER FOLLOW-UP SURVEY DETAILED KEY FINDINGS

Website User Follow-Up Survey—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.
- **Out-of-state visitor** - A TravelOregon.com Website User Intercept Survey respondent who resides outside the state and visited Oregon after using the website.
- **In-state visitor** - A TravelOregon.com Website User Intercept Survey respondent who resides inside the state and traveled within Oregon after using the website.



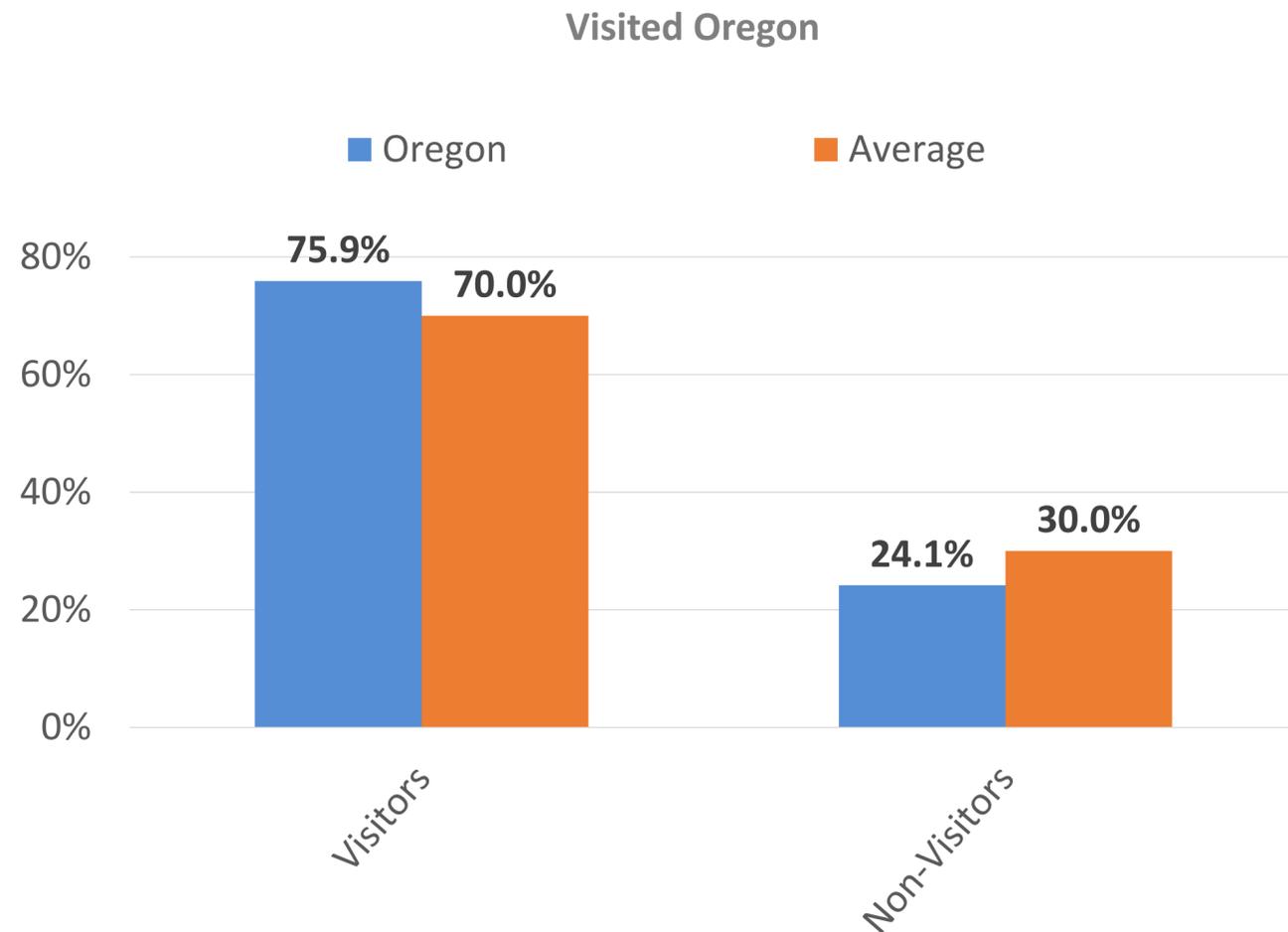
Above: Image of Sparks Lake from @TravelOregon Instagram.

OUT-OF-STATE VISITORS

The following section presents detailed key findings of out-of-state TravelOregon.com website users who completed the Website User Follow-up Survey.

Website Users who Visited Oregon

Three-quarters of out-of-state survey respondents visited Oregon post-use of **TravelOregon.com (75.9%)**. The average for all state website users residing out-of-state is 70.0 percent.



Question: Since visiting our website, have you taken a trip to Oregon? (Select one) Base: All out-of-state respondents who used the website; 2,514 responses.

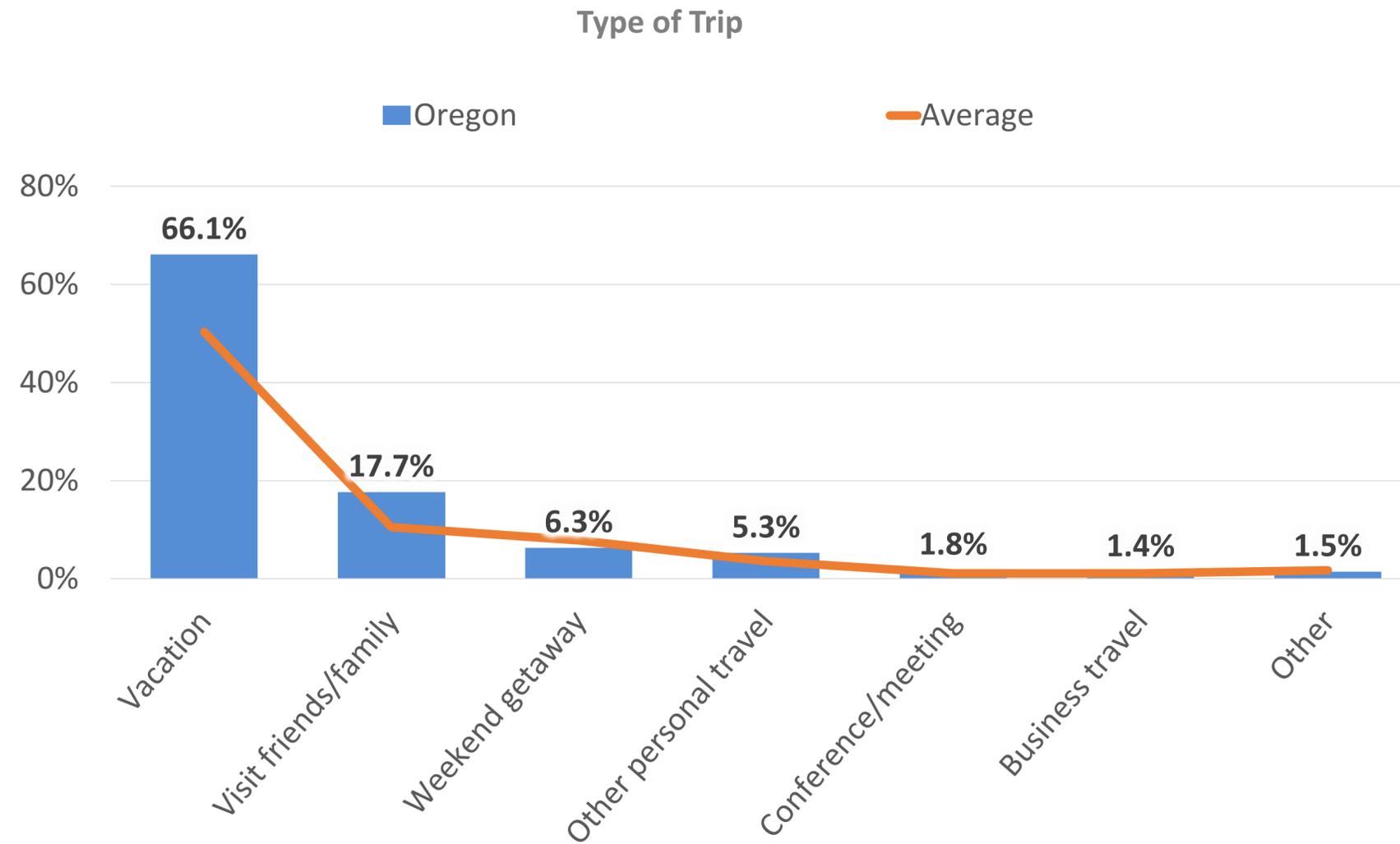
On average, out-of-state visitors made **1.8 trips to Oregon** after using the website. The average state website user who lived out-of-state made 1.6 trips to the destination post-use of the website.



Question: Since visiting our website, how many trips to or within Oregon have you made? (Select one); Have you previously visited Oregon prior to your most recent trip? (Select one) Base: All out-of-state respondents who visited after using the website; 1,927 responses.

Profile of Follow-up Survey Respondents

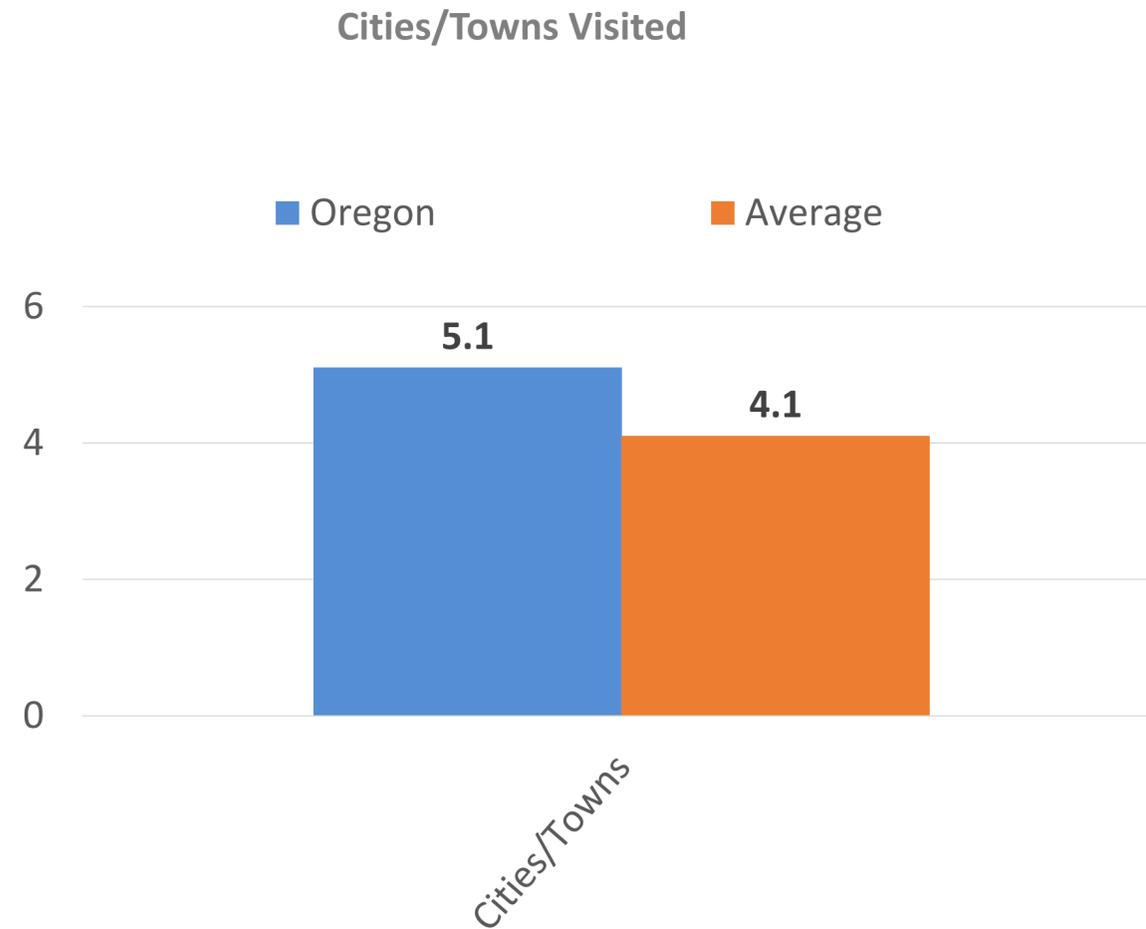
Leisure travel represents the crux of visitation to Oregon for out-of-state travelers (72.4%). This includes two-thirds who took a vacation to Oregon (66.1%) and 6.3 percent who made a weekend getaway trip after using the website. Out-of-state website users who visited post-use of the website also traveled to Oregon to visit friends and/or family (17.7%). Compared to the average for all state website users, a larger proportion of TravelOregon.com out-of-state users who visited came for a vacation (66.1% vs. 50.3%), while a slightly smaller proportion traveled to Oregon for a weekend getaway (6.3% vs. 7.8%).



Question: Which of the following best describes the primary reason for your most recent trip to or within Oregon?
(Select one) Base: All out-of-state respondents who visited after using the website; 1,917 responses.

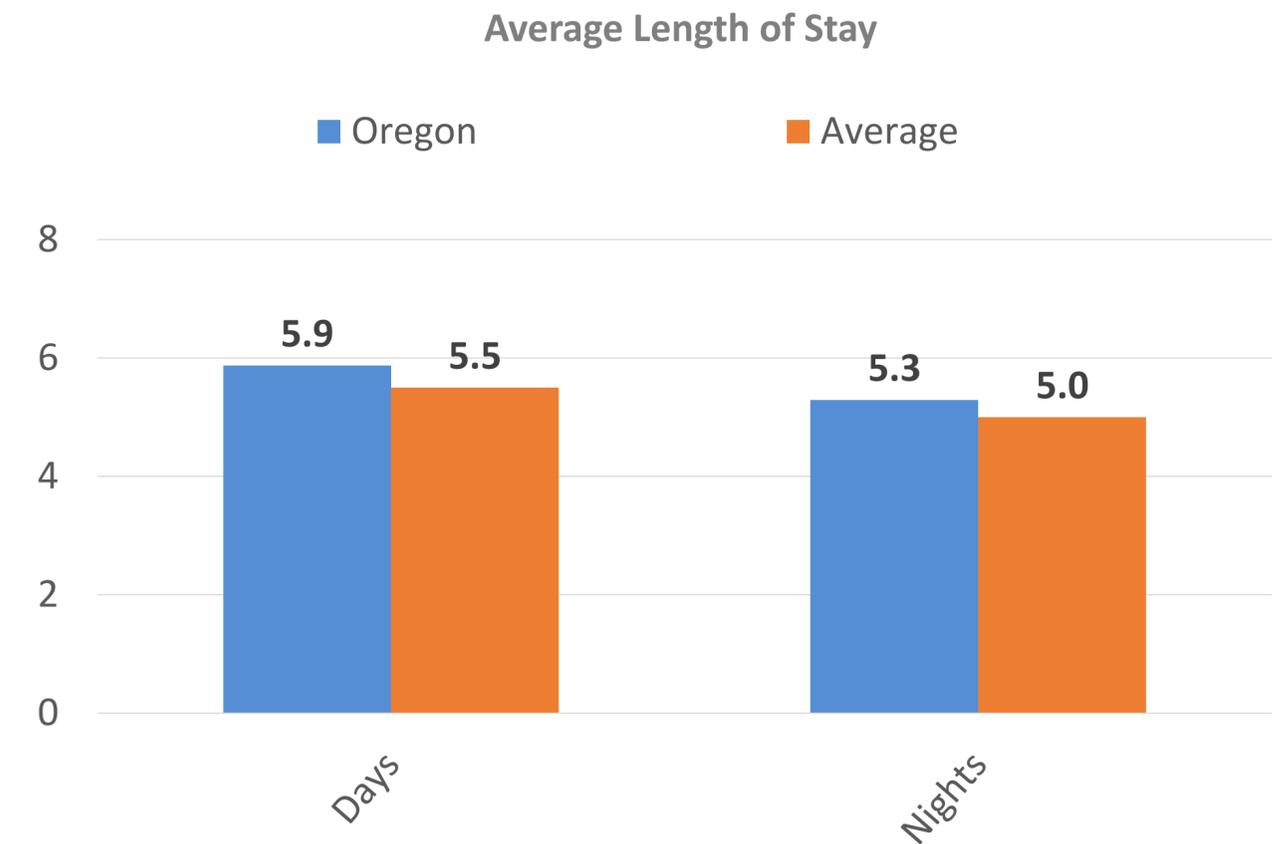
Profile of Follow-up Survey Respondents

Out-of-state travelers visited an average of 5.1 cities/towns during their trip to Oregon, compared to 4.1 cities/towns on average for all state website users living out-of-state.



Question: During your trip to or within Oregon, how many different cities/towns did you visit? Base: All out-of-state respondents who visited after using the website; 1,920 responses.

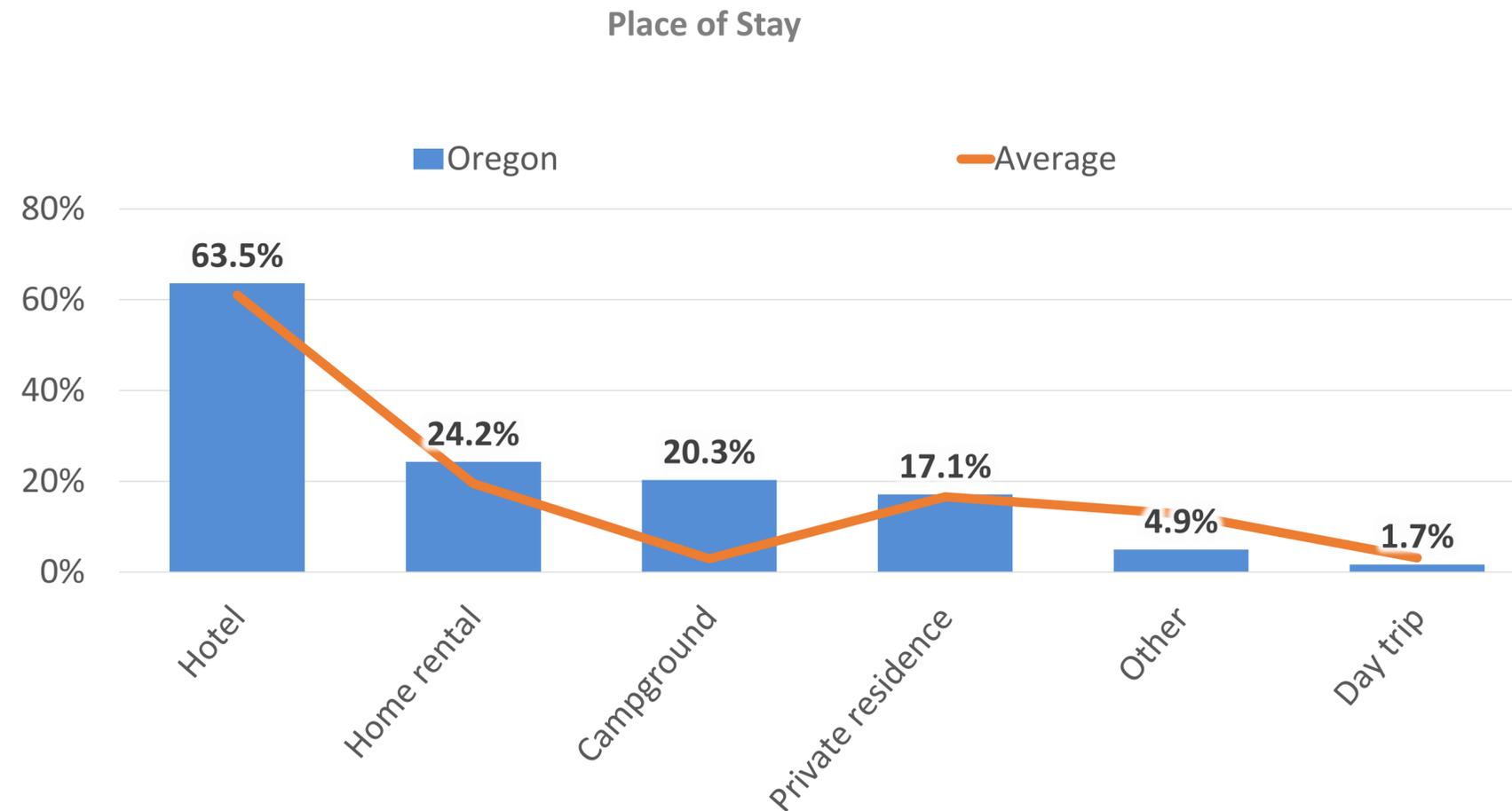
Out-of-state website users who visited Oregon after using the website spent an average of 5.9 days and 5.3 nights in the state. This was slightly higher than the average length of stay for all out-of-state website users (at 5.5 days and 5.0 nights).



Question: How many total days and nights did you spend in Oregon on this trip? Base: All out-of-state respondents who visited after using the website; 1,917 responses.

Place of Stay in Oregon

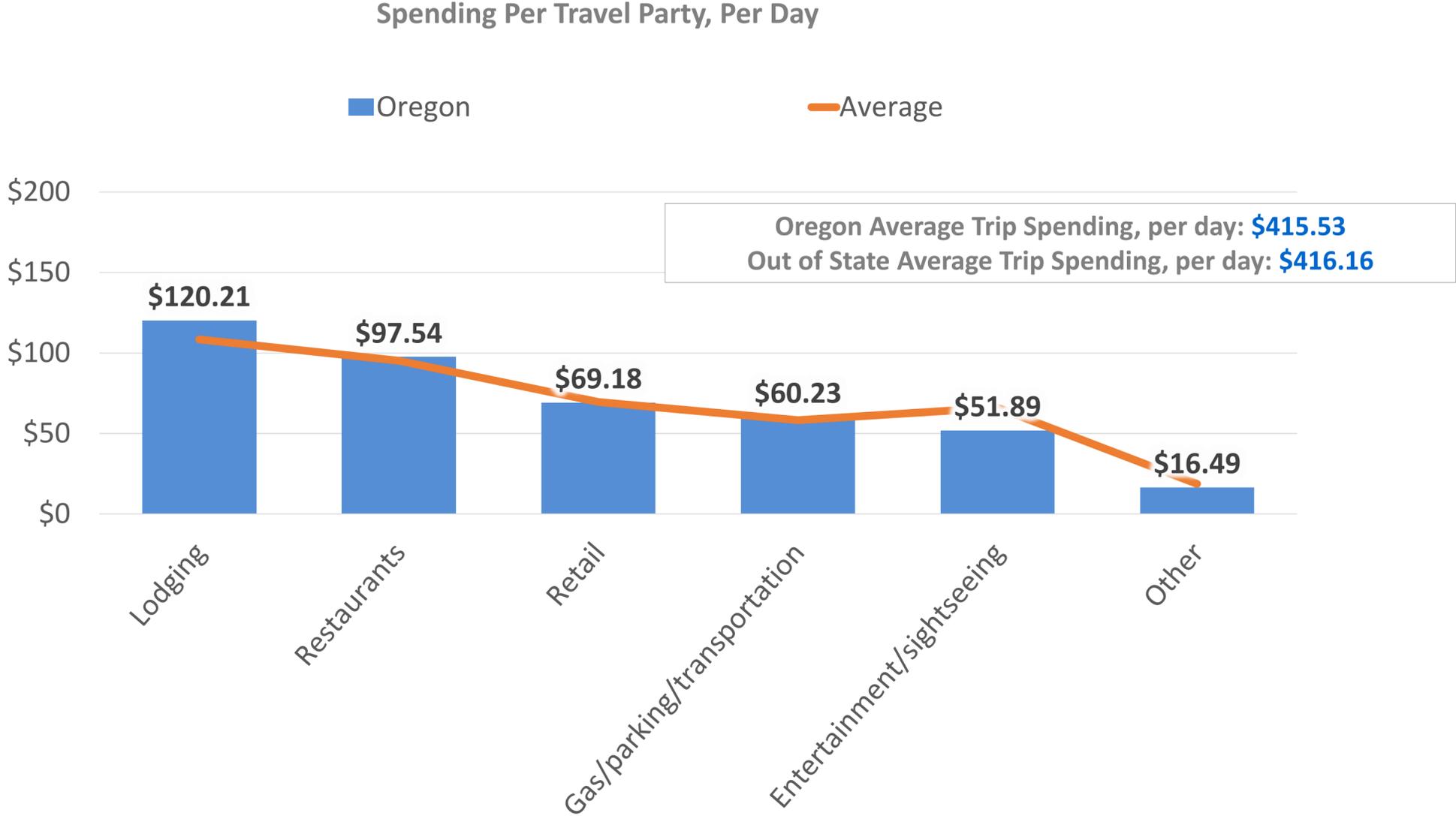
Commercial lodging in Oregon was the most common place of stay. Amongst website users who visited post-use of TravelOregon.com, over 60 percent stayed in a hotel/resort or motel within Oregon during their trip (63.5% vs. 61.0% of all state website users). This highlights Travel Oregon’s potential to generate incremental room nights. Additionally, 24.2 percent of these visitors stayed in a home rental in Oregon, while 20.3 percent stayed on a campground and 17.1 percent stayed in a private residence while visiting the state. Only 1.7 percent of these visitors were day-trippers who did not stay overnight in Oregon.



Question: While on this trip, where did you stay in Oregon? (Select one) Base: All out-of-state respondents who visited after using the website; 1,920 responses.

Visitor Spending in Oregon

Out-of-state website users who visited Oregon reported an average in-market daily trip spending of \$415.53. This spending covered an average of 2.4 persons. Thus, it is estimated that each of these visitors represents \$176.16 in daily spending in Oregon.

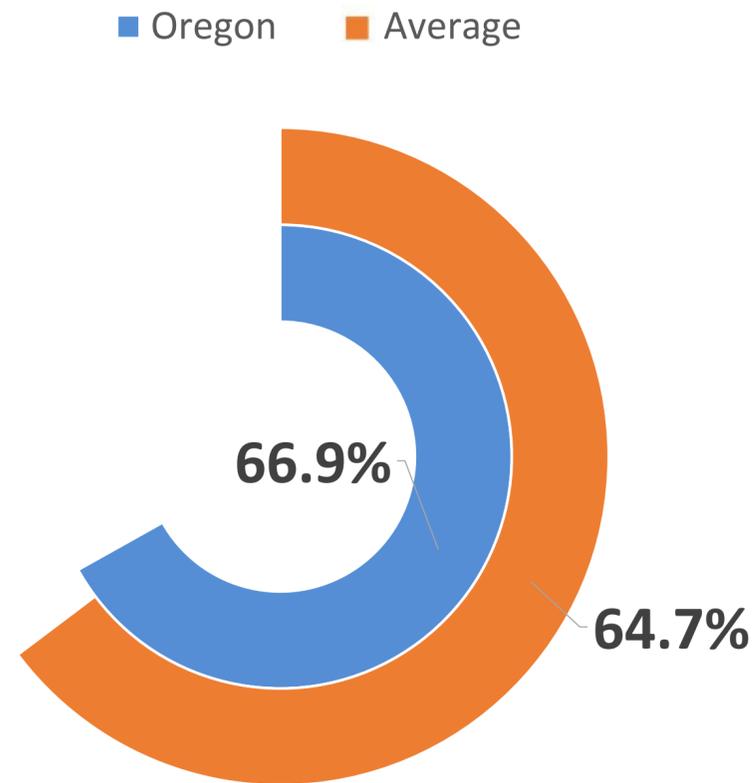


Question: While on this trip, approximately how much IN TOTAL did you spend PER DAY while in Oregon on each of the following? Please only INCLUDE spending inside Oregon and EXCLUDE any spending made outside Oregon or before arriving in Oregon. Base: All out-of-state respondents who visited after using the website; 1,866 responses.

Impact of Website on Destination Decision

TravelOregon.com effectively persuades its out-of-state users to visit the destination. In total, two-thirds of visitors agreed that the site indeed influenced them to visit Oregon (66.9%), similar to the average for all out-of-state website users (64.7%).

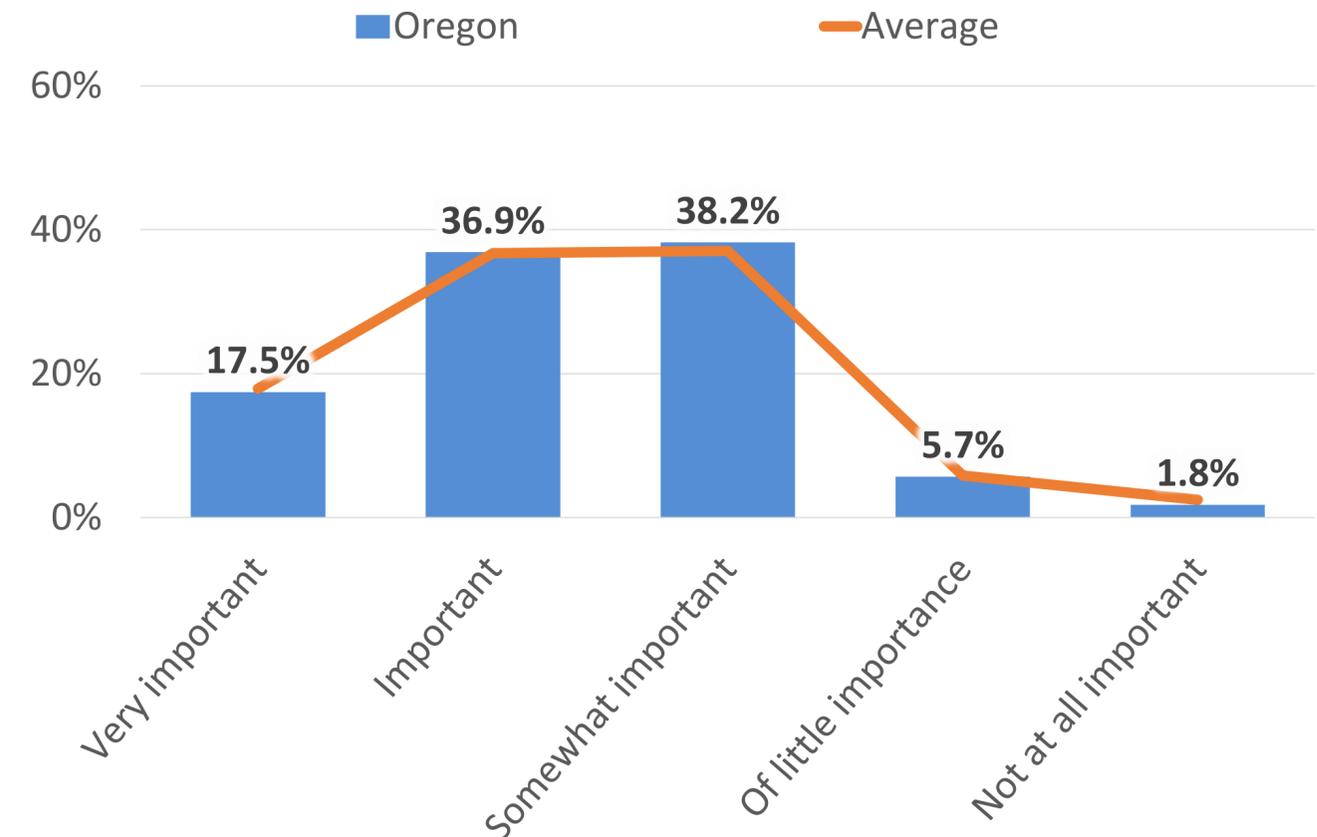
Impact of Website on Destination Decision



Question: Do you feel that our website helped you make your decision to take this trip to Oregon?
 Base: All out-of-state visitors who were potentially influenced by the website in the destination decision; 1,842 responses.

Amongst out-of-state residents who reported that the website influenced their decision to visit Oregon, over half reported that the website was “Important” (36.9%) or “Very important” (17.5%) to this decision (54.4%). This distinction is significant because it identifies those visitors on incremental trips, whose direct spending in Oregon was used in the website’s ROI estimates.

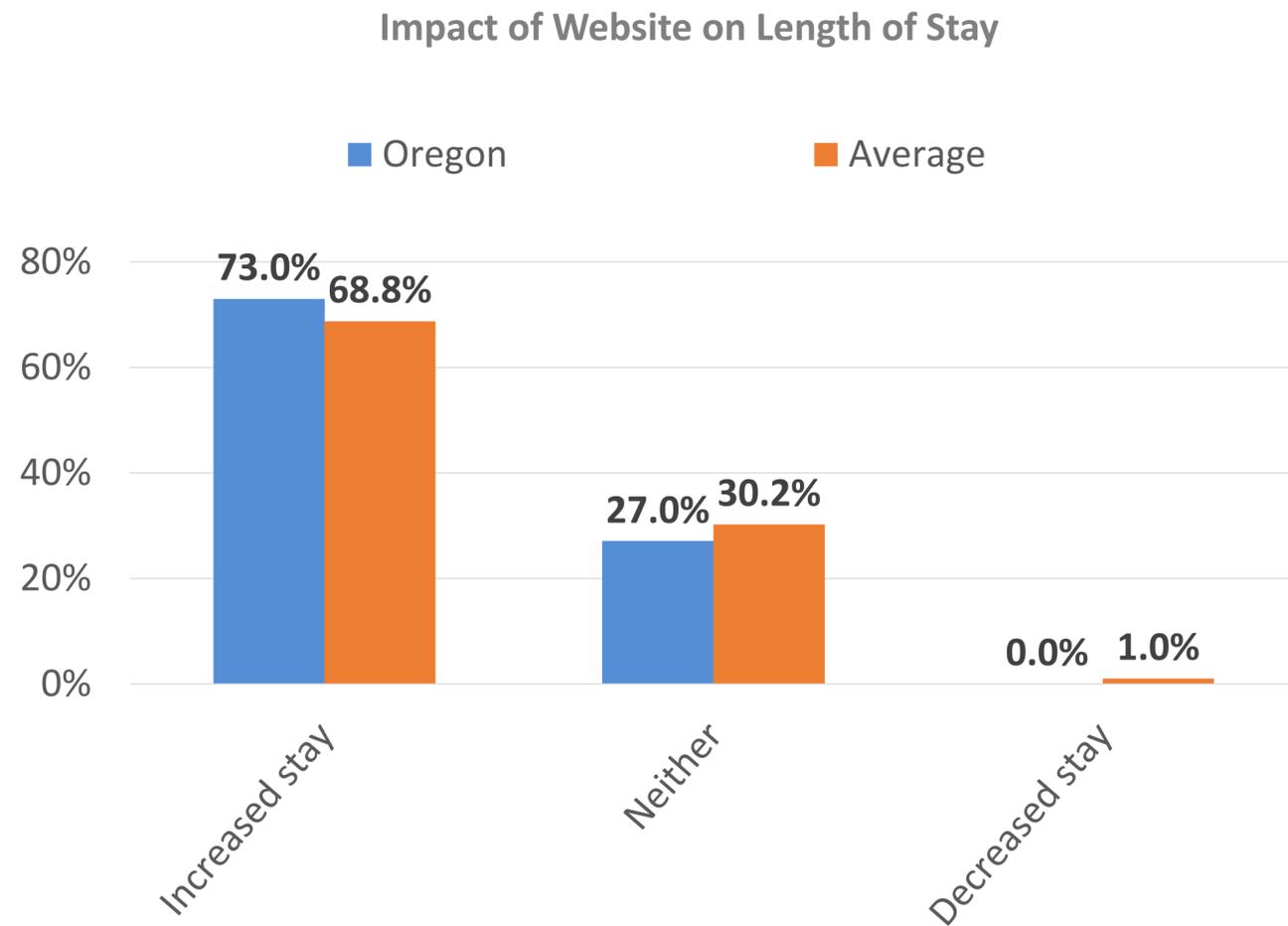
Importance of Website on Destination Decision



Question: How important was our website to you in making the decision to take this trip to Oregon? (Select one)
 Base: All out-of-state visitors who were potentially influenced by the website in the destination decision; 1,232 responses.

Impact of Website on Length of Stay

Nearly three-quarters of out-of-state survey respondents who said that the website influenced the number of days they spent in Oregon reported that it increased their length of stay (73.0%). This was slightly higher than the average, in which 68.8 percent of all state website users stated that the destination website influenced them to increase their length of stay.



Question: How did our website influence the number of days you spent in Oregon on this trip? (Select one) 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; 200 responses.

Out-of-state survey respondents who reported that the website indeed increased their length of stay in Oregon did so by an average of 2.2 days. The typical out-of-state website user increased their length of stay by 2.1 days.

Average Increase on Length of Stay



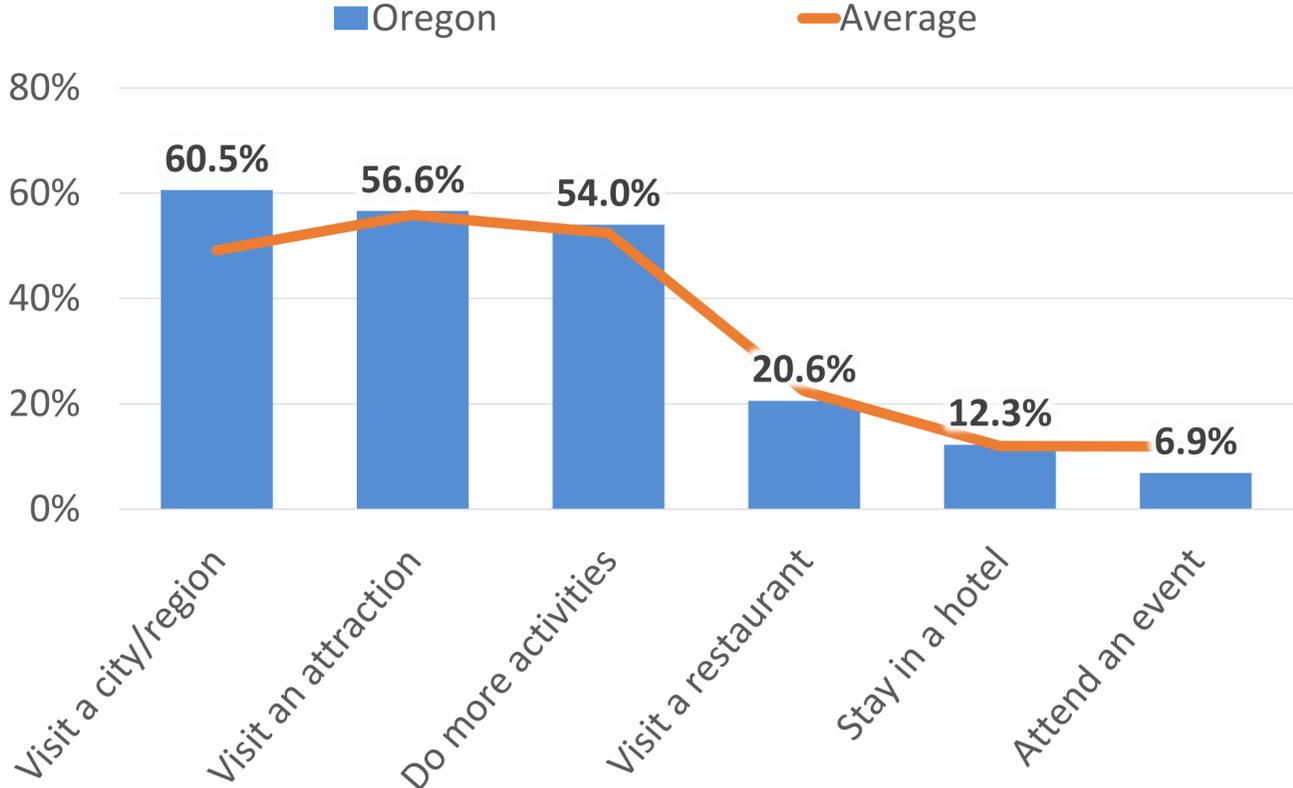
Question: How many days did you increase the length of your stay as a result of using our website? Base: All out-of-state business or conference travelers or those who reported that the website did not influence their destination decision but did influence their length of stay; 147 responses.

Trip Decisions Influenced and Descriptions of Website Content

TravelOregon.com also influences in-market activities. Out-of-state website users who took a trip to Oregon visited a certain city/region (60.5%), went to a specific attraction (56.6%) and/or did more activities (54.0%) as a result of content accessed on the site.

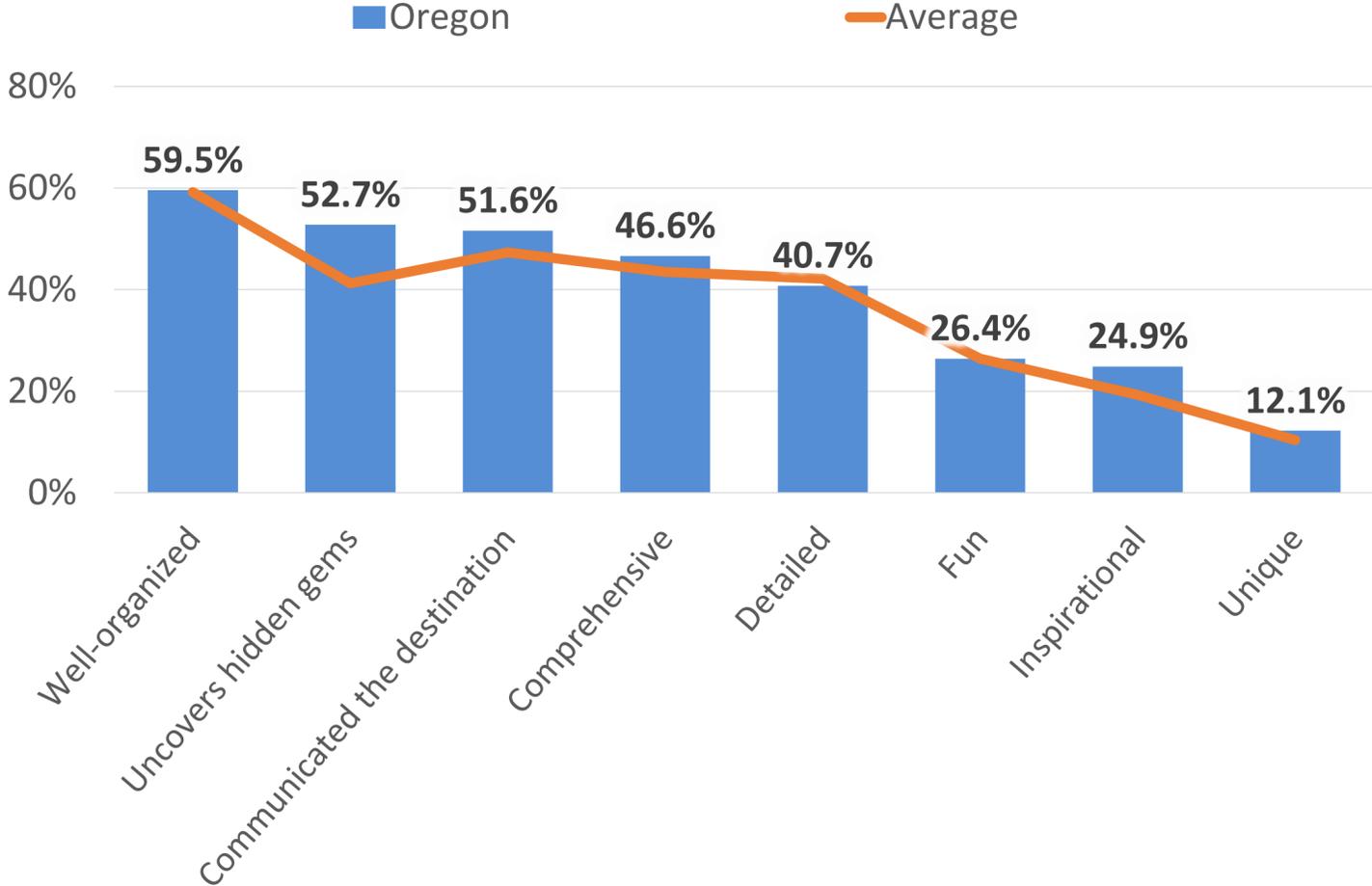
TravelOregon.com content was described by out-of-state visitors as “well-organized” (59.5%). These website users also described the site as a resource that “uncovers hidden gems” (52.7%), “communicated the destination” (51.6%), “comprehensive” (46.6%) and “detailed” (40.7%).

Trip Decisions Influenced



Question: Did the website influence you to do any of the following? (Select all that apply)
 Base: All out-of-state respondents who visited after using the website; 1,918 responses.

Descriptions of Website Content

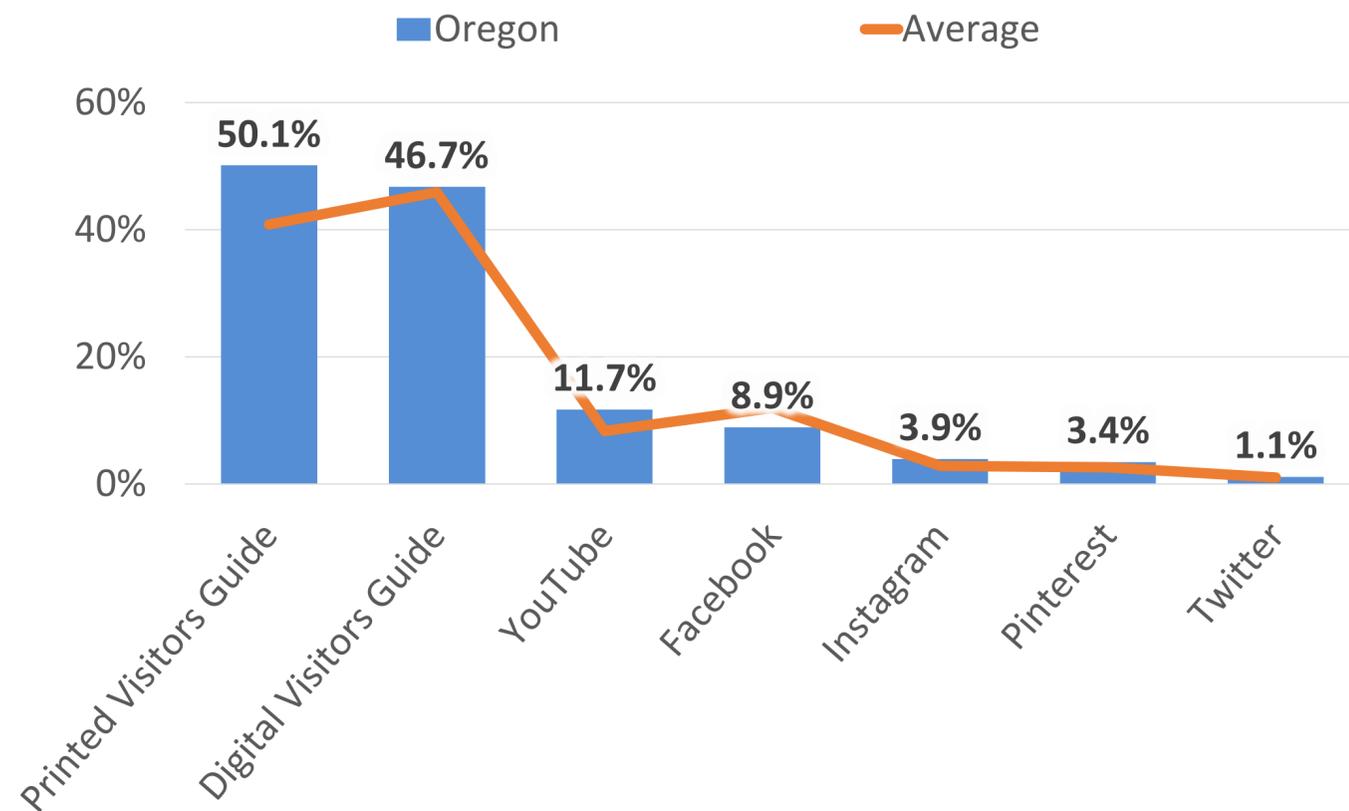


Question: Which of these words and phrases (if any) describe the content available on our website? (Select all that apply). Base: All out-of-state respondents who visited after using the website; 2,538 responses.

Official Resources Used and Likelihood to Recommend Website

In addition to TravelOregon.com, other official Travel Oregon resources were commonly used in the trip planning process for out-of-state visitors. The most widely used of these was the Oregon Official Visitors Guide—most typically in print (50.1%), but also digitally (46.7%). Another 11.7 percent of website users who visited the destination also viewed YouTube video content while planning their Oregon trip, while 8.9 percent accessed Travel Oregon on Facebook to plan their trip.

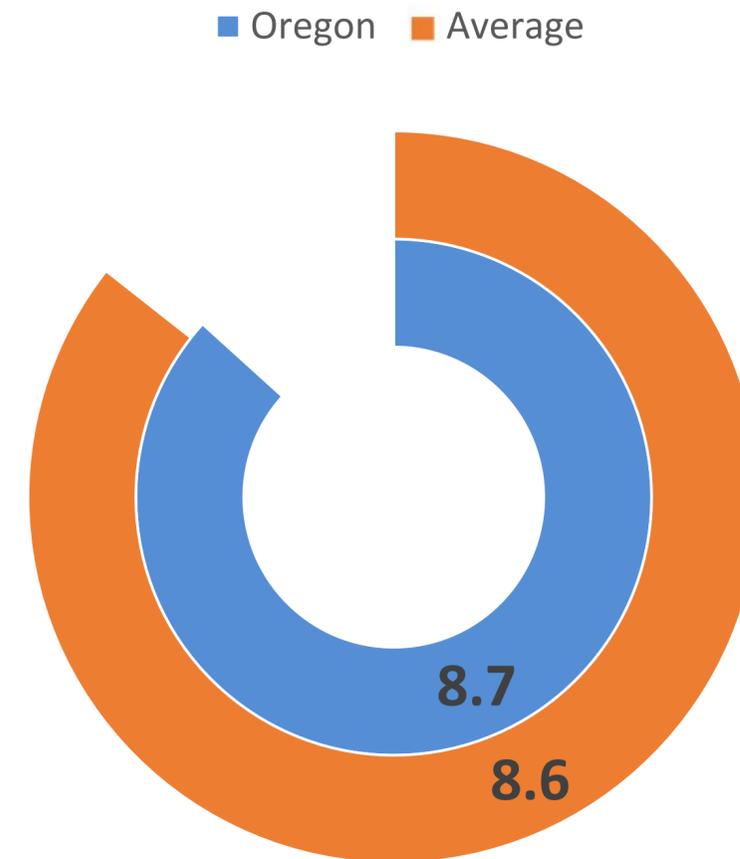
Official Travel Oregon Resources Used



Question: Which of these other resources did you use to plan your trip to Oregon? (Select all that apply) Base: All out-of-state respondents who visited after using the website; 1,918 responses.

TravelOregon.com is highly likely to be recommended by its out-of-state users to others planning a trip to Oregon. Using a 10-point scale, website users who visited rated their likelihood to recommend the website to others planning a trip to the destination an 8.7 on average (similar to the average for all state website users).

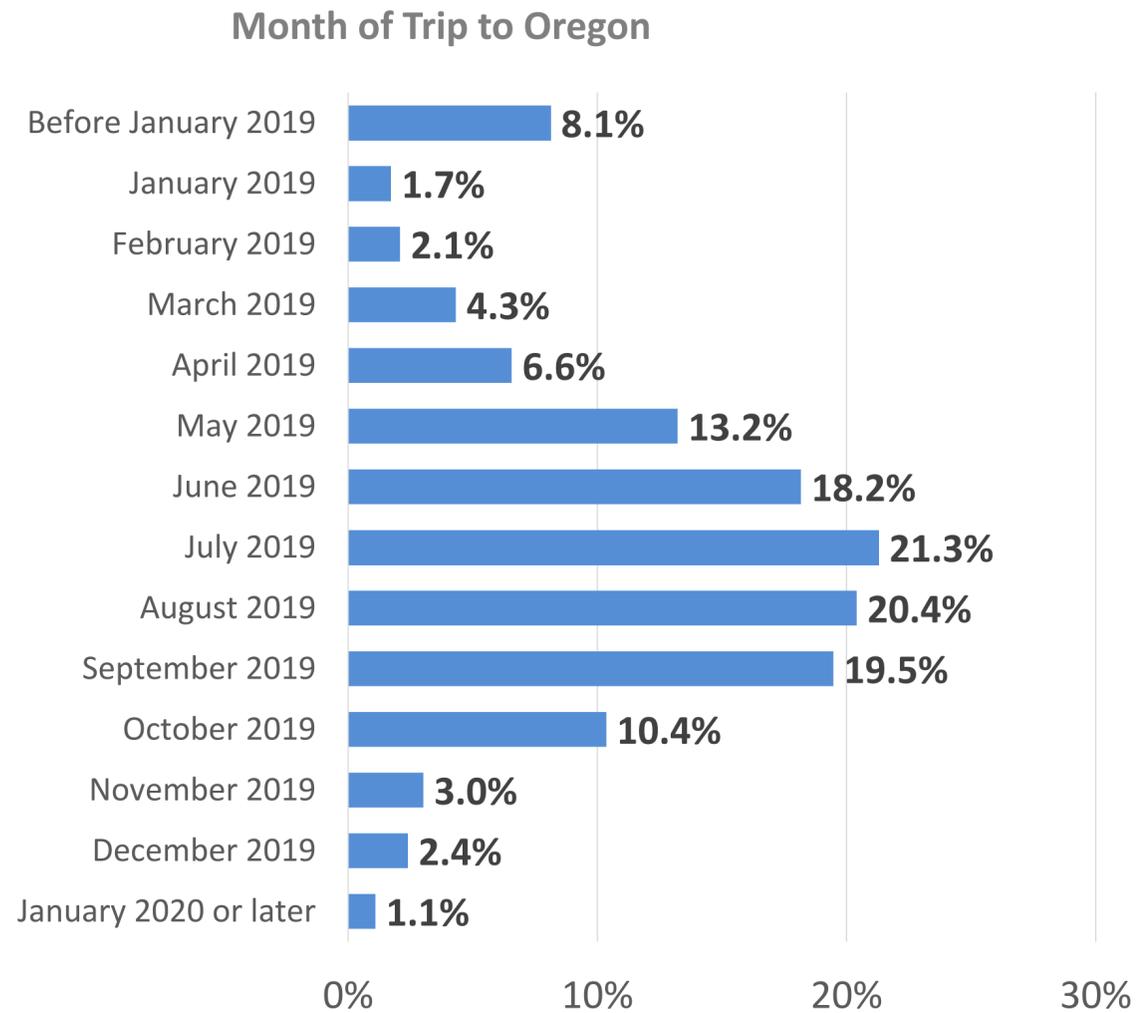
Likelihood to Recommend TravelOregon.com— 10 Point Scale



Question: How likely would you be to recommend TravelOregon.com to others planning a trip to or within Oregon? Base: All out-of-state respondents who visited after using the website; 2,538 responses.

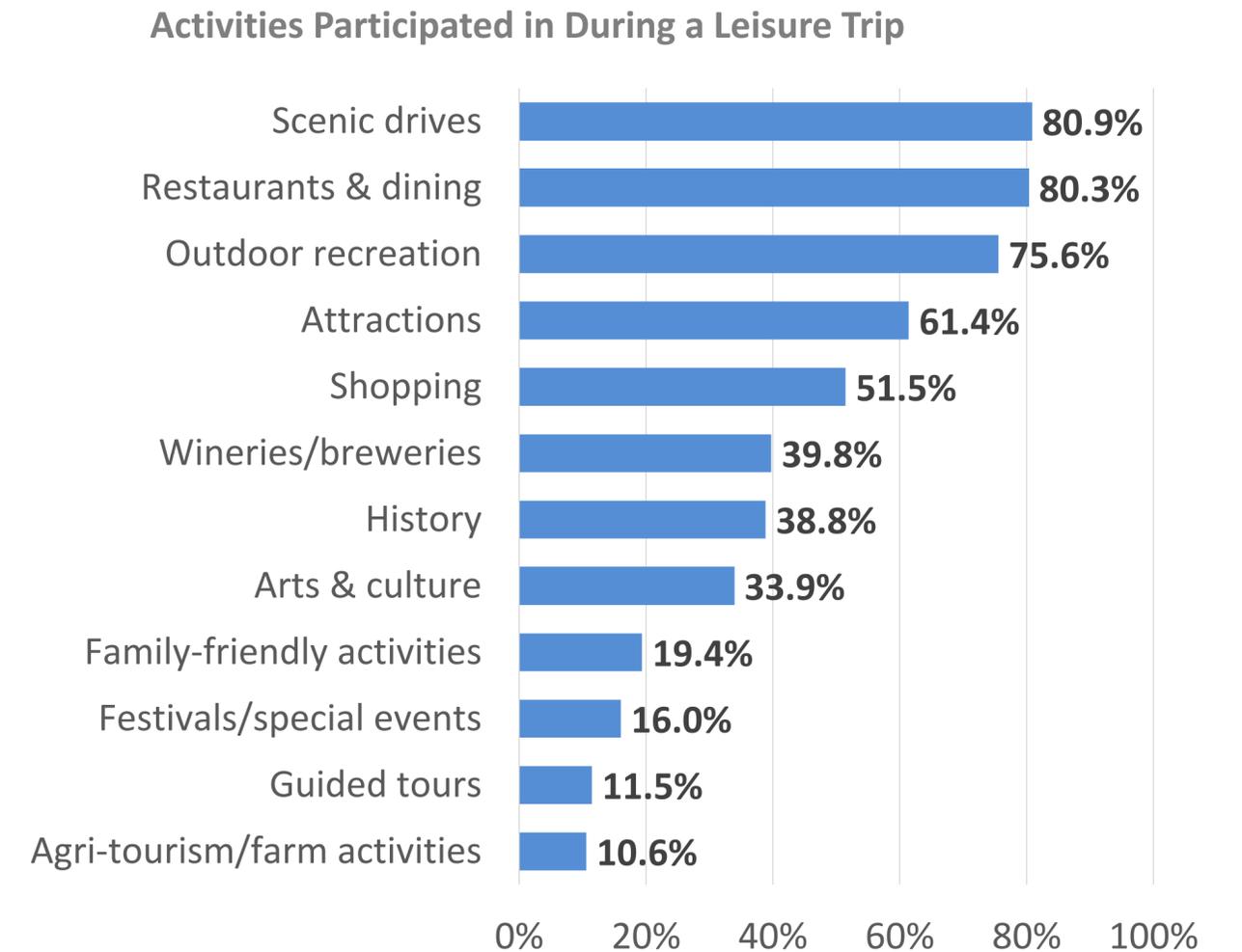
Custom Questions: Month of Trip & Activities Participated in During Trip

Out-of-state visitors traveled to Oregon most often during the summer months of 2019. June (18.2%), July (21.3%), August (20.4%) and/or September (19.5%) were reported as the top months out-of-state visitors traveled to Oregon.



Question: In which month(s) did you take this trip? (Select all that apply)
 Base: All out-of-state follow-up respondents who visited Oregon; 1,921 responses.

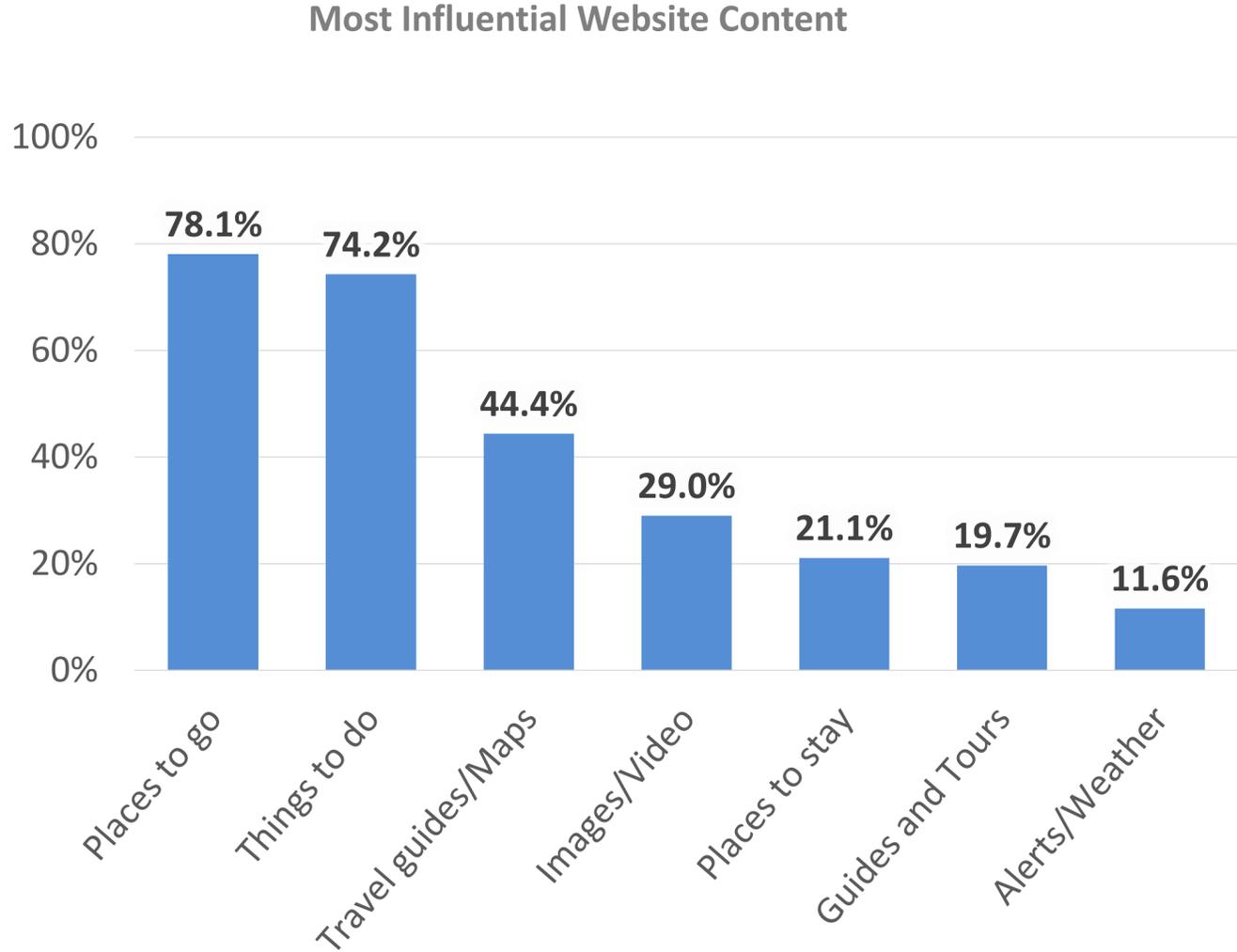
Out-of-state visitors participated in a variety of activities during their trip to Oregon. Out-of-state website users who visited commonly took scenic drives (80.9%), dined (80.3%) and/or experienced outdoor recreation (75.6%) during their Oregon trip. These website users also participated in general attractions (61.4%) and shopped (51.5%) during their trip to Oregon.



Question: Which of the following activities did you participate in during your trip within Oregon? (Select all that apply)
 Base: All out-of-state follow-up respondents; 2,538 responses.

Custom Question: Most Influential Website Content

Content specific to places to go (78.1%) and/or things to do (74.2%) was most influential in planning an Oregon trip. This was followed by travel guides/maps/Ask Oregon/visitor centers (44.4%), images/video (29.0%), places to stay (21.1%) and/or guides and tours (19.7%).

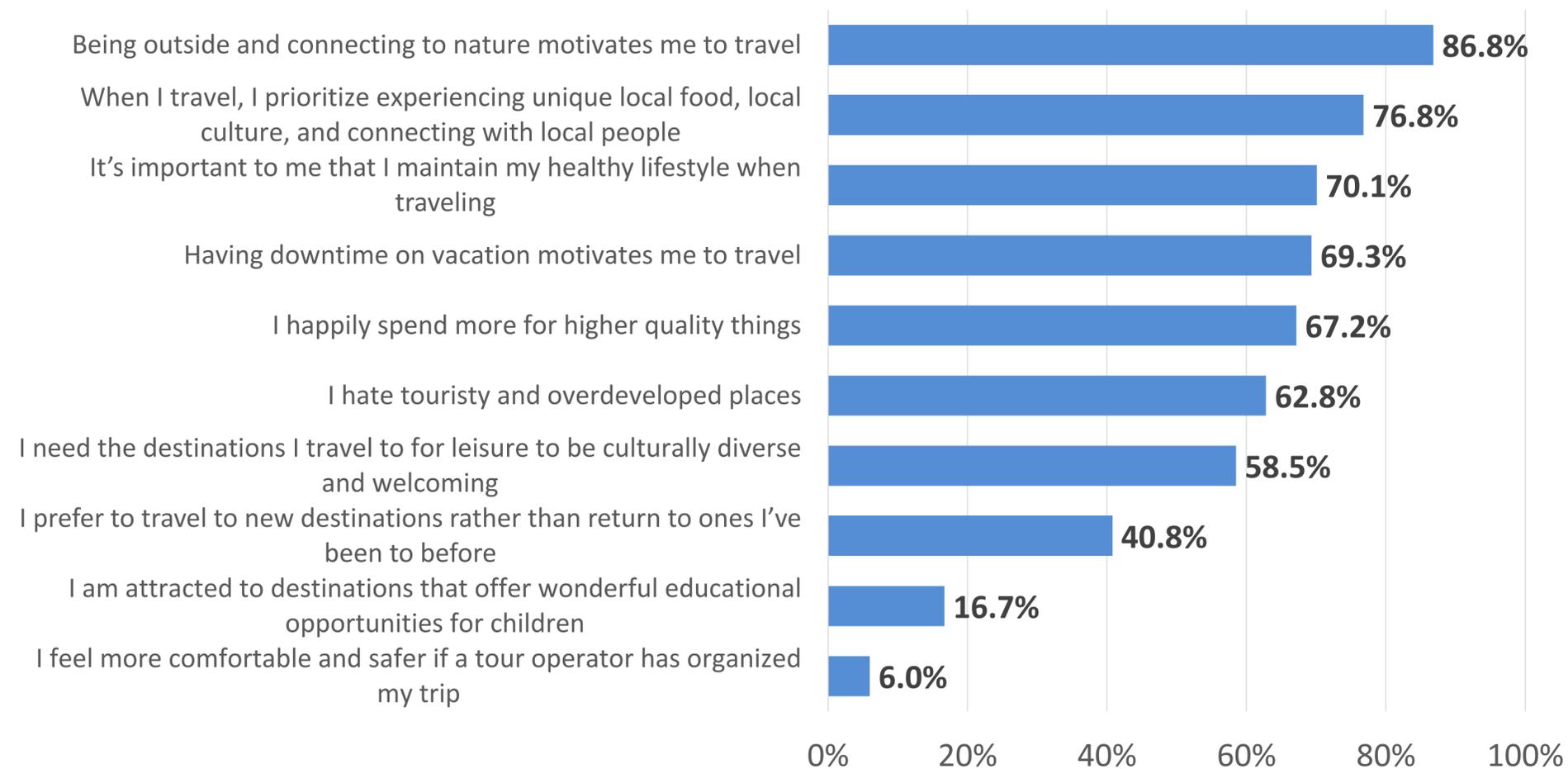


Question: What types of content on our website were most influential in planning this trip? (Select all that apply)
Base: All out-of-state respondents who visited after using the website; 1,918 responses.

Custom Question: Type of Leisure Traveler

Out-of-state visitors commonly described themselves as travelers who prioritize being outside/connecting with nature (86.8%) and having a local experience (76.8%) during a leisure trip. Additionally, these visitors were more inclined to maintain their healthy lifestyle (70.1%), have downtime (69.3%), spend more for higher quality things (67.2%), hate experiencing touristy places (62.8%), expect a culturally diverse/welcoming destination (58.5%) and prefer traveling to new places (40.8%) while on a leisure trip.

Type of Leisure Traveler – Top 2 Box (4 or 5)



Question: How much do you agree with the following statements? Please use the 5-point scale where "1" equals "Strongly disagree" and "5" equals "Strongly agree" to rate your level of agreement with each statement.] Base: All out-of-state follow-up respondents; 2,528 responses.

Visitor Demographics

The table below shows the demographic profile of out-of-state website users who visited after using TravelOregon.com compared to all out-of-state website users.

	Oregon	Average
Female	59.8%	59.8%
Male	40.1%	39.1%
Mean age	55.5	53.9
Mean household income	\$96,896	\$90,909
Married/Partnered	77.2%	76.9%
Single	16.9%	17.7%
% with Children under 18	11.3%	17.0%
College graduate or more	72.3%	65.3%
Caucasian ethnicity	84.6%	83.5%
Non-Caucasian ethnicity	9.1%	11.0%

Base: All out-of-state respondents who visited after using the website; 1,920 completed surveys.

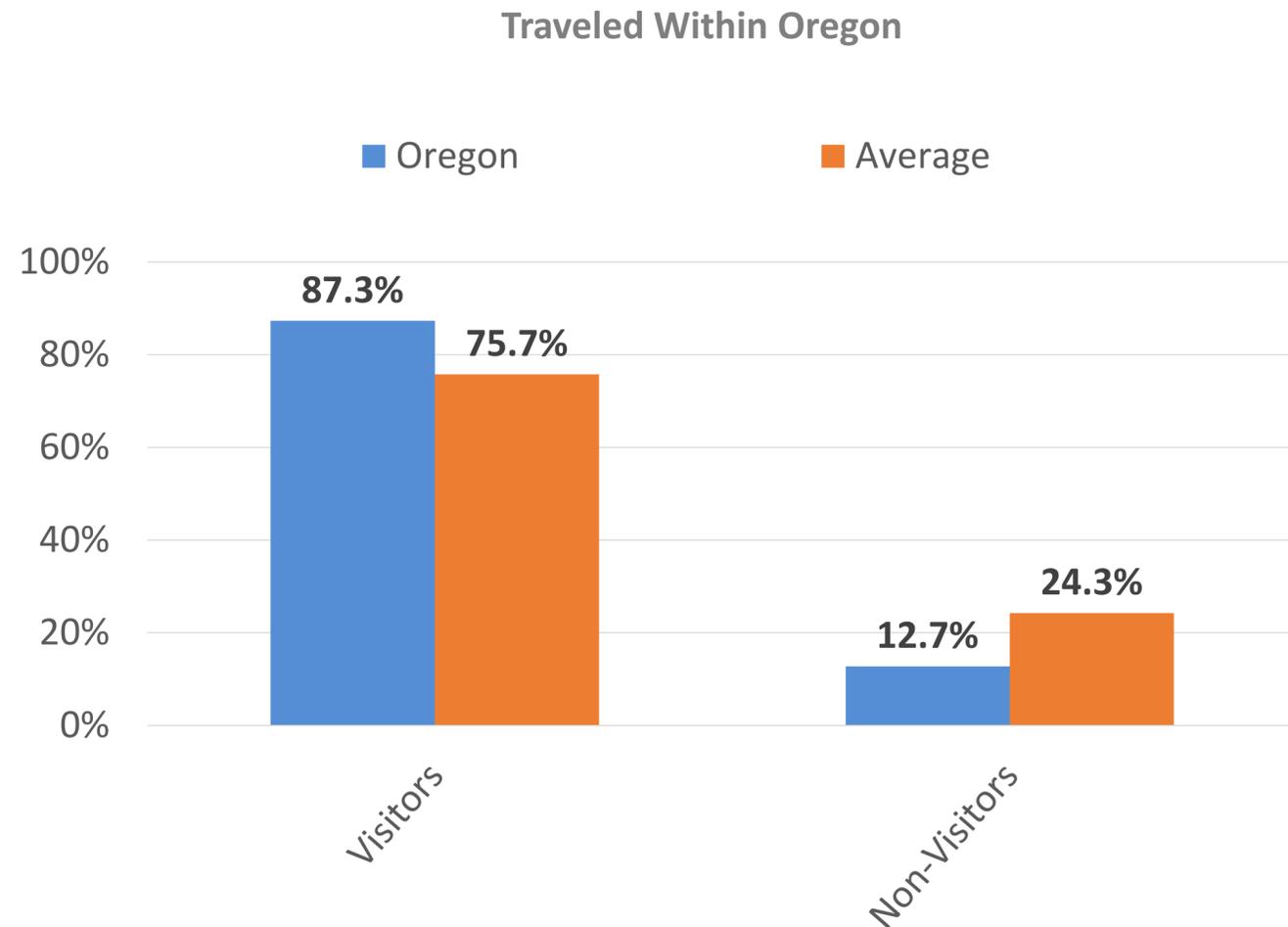
IN-STATE VISITORS

The following section presents detailed key findings of in-state TravelOregon.com website users who completed the Website User Follow-up Survey.

Website Users who Traveled Within Oregon

A majority of in-state survey respondents traveled within Oregon post-use of TravelOregon.com (87.3%). The average for all in-state website users was 75.7 percent.

On average, in-state survey respondents who visited made 3.2 trips within Oregon after using the website. This was slightly higher compared to the average in-state website user (3.0 trips).



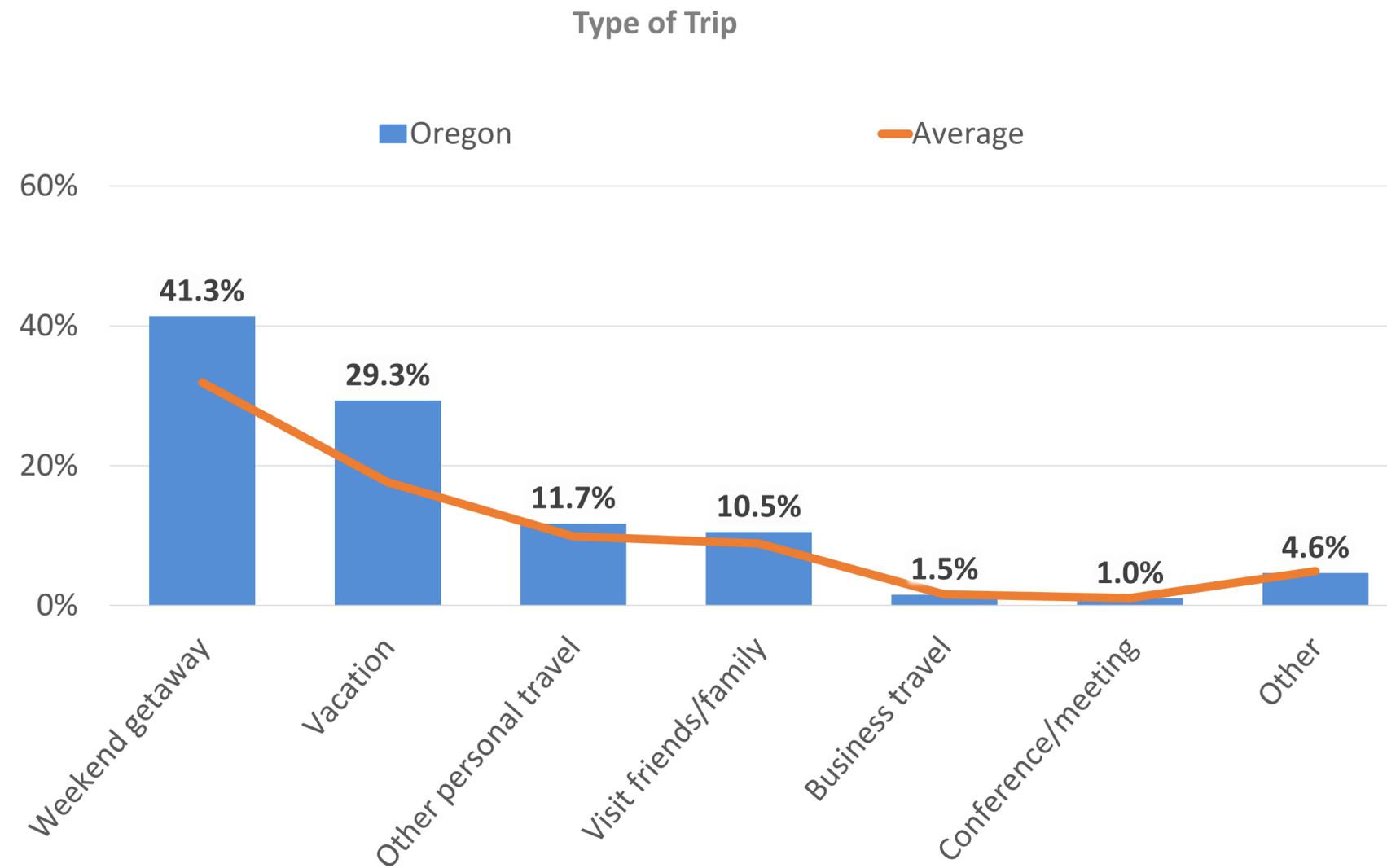
Question: Since visiting our website, have you taken a trip within the state? (Select one) Base: All in-state respondents who used the website; 1,020 responses.



Question: Since visiting our website, how many trips to or within Oregon have you made? (Select one) Base: All in-state respondents who visited after using the website; 911 responses.

Profile of Follow-up Survey Respondents

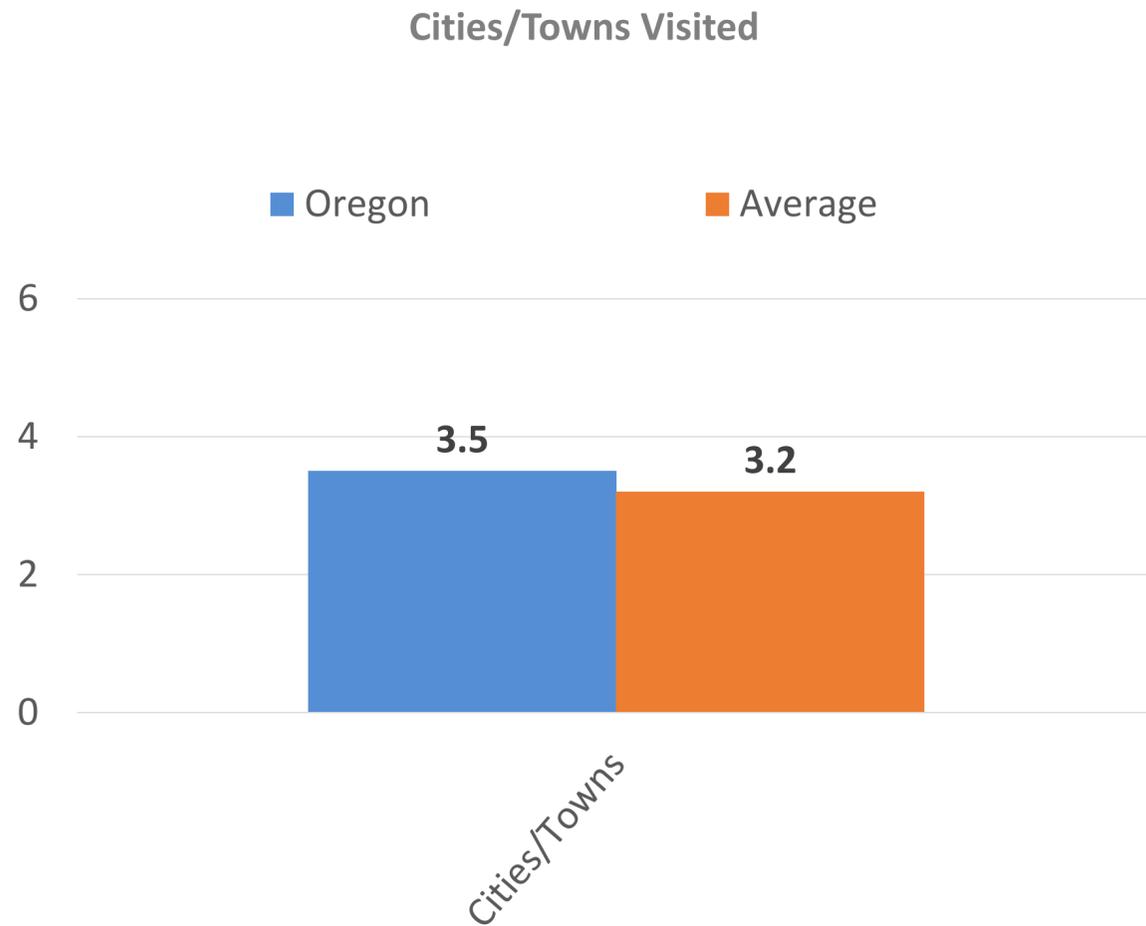
Leisure travel represents the crux of visitation to Oregon for in-state travelers (70.6%). This includes 41.3 percent who took a weekend getaway trip and 29.3 percent who went on a vacation within Oregon after using the website. In-state website users who visited also traveled within Oregon for other personal reason (11.7%) or to visit friends and/or family (10.5%). Compared to the average for all state website users, a larger proportion of TravelOregon.com in-state users visited for a weekend getaway (41.3% vs. 31.9%), while a smaller proportion were on a vacation within Oregon (17.6% vs. 22.3%).



Question: Which of the following best describes the primary reason for your most recent trip to or within Oregon?
(Select one) Base: All in-state respondents who visited after using the website; 905 responses.

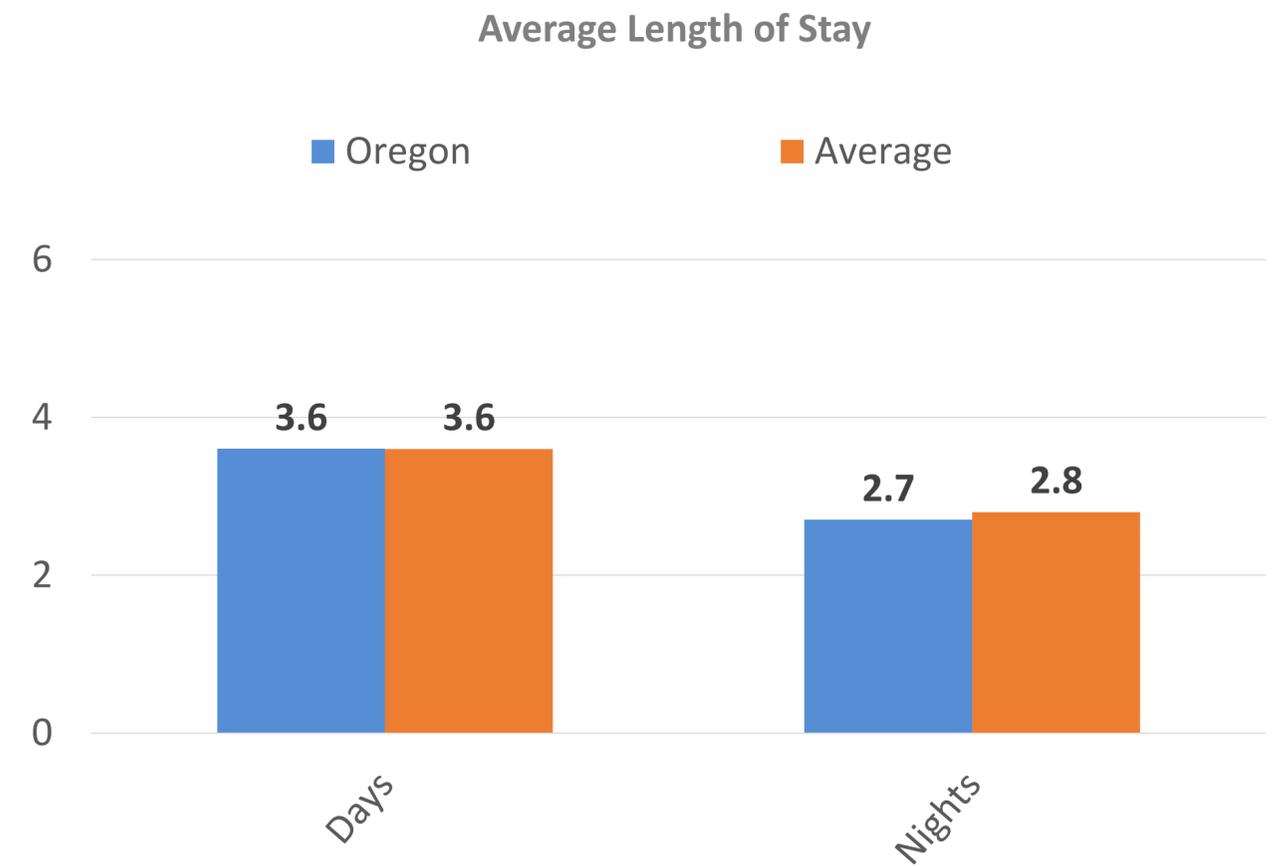
Profile of Follow-up Survey Respondents

In-state travelers visited an average of 3.5 cities/towns during their trip within Oregon, compared to 3.2 cities/towns on average for all in-state website users.



Question: During your trip to or within Oregon, how many different cities/towns did you visit? Base: All in-state respondents who visited after using the website; 906 responses.

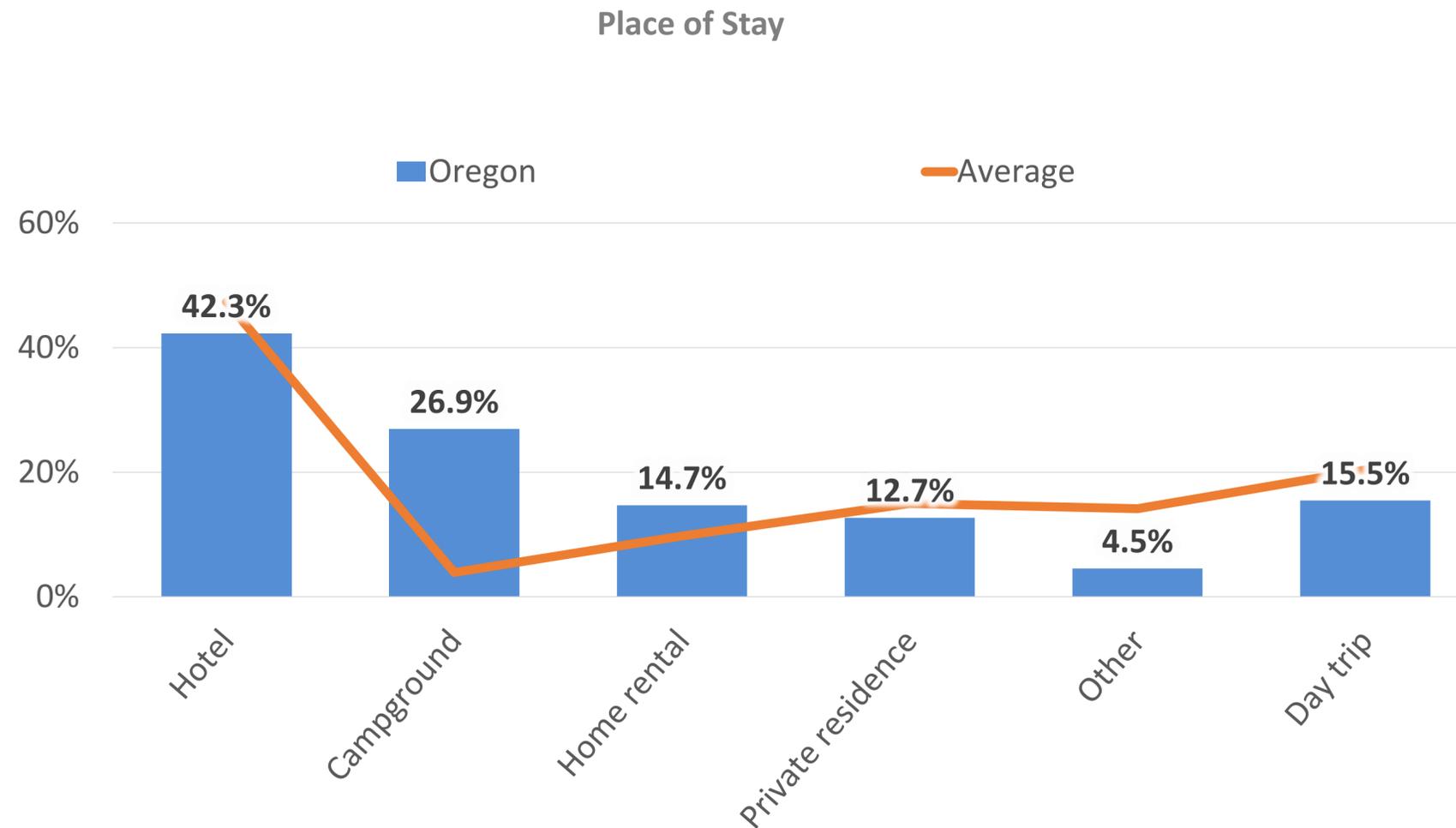
In-state travelers who visited Oregon after using the site spent an average of 3.6 days and 2.7 nights in the state. This was nearly identical to the average length of stay for all in-state website users (3.6 days and 2.8 nights).



Question: How many total days and nights did you spend in Oregon on this trip? Base: All in-state respondents who visited after using the website; 905 responses.

Place of Stay in Oregon

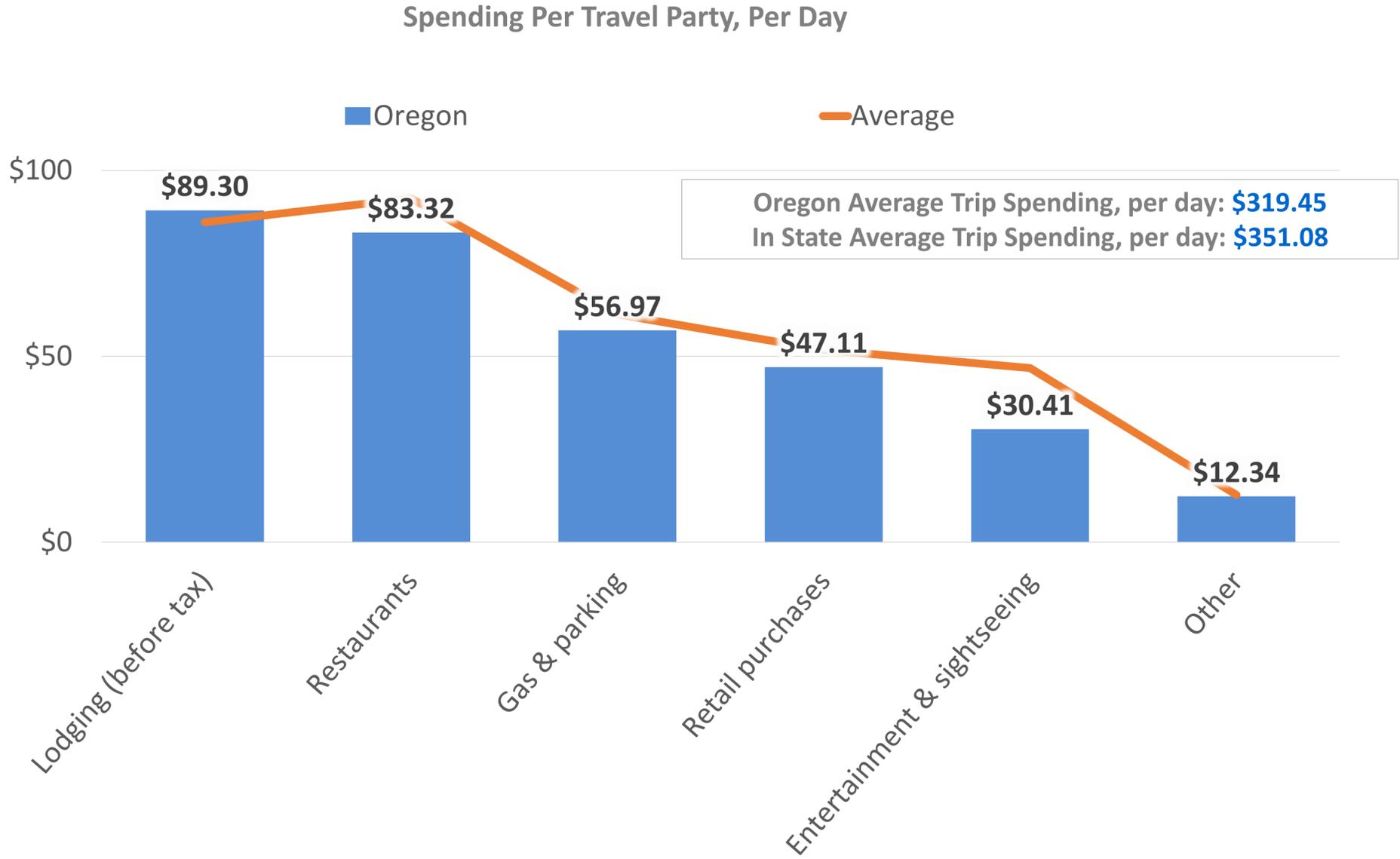
Commercial lodging in Oregon was the most common place of stay for in-state visitors. Amongst in-state website users who visited post-use of TravelOregon.com, four-in-ten stayed in a hotel, motel or inn within Oregon during their trip (42.3%). Additionally, over one-quarter of these visitors stayed overnight at a campground in Oregon (26.9%), while 14.7 percent stayed in a home rental and 12.7 percent stayed in a private residence during their trip. 15.5 percent of in-state visitors were on a day-trip within the state.



Question: While on this trip, where did you stay in Oregon? (Select one) Base: All in-state respondents who visited after using the website; 906 responses.

Visitor Spending in Oregon

In-state website users who visited Oregon reported an average daily trip spending of \$319.45. This spending covered an average of 2.4 persons. Thus, it is estimated that each of these visitors represents \$135.66 in daily spending in Oregon.



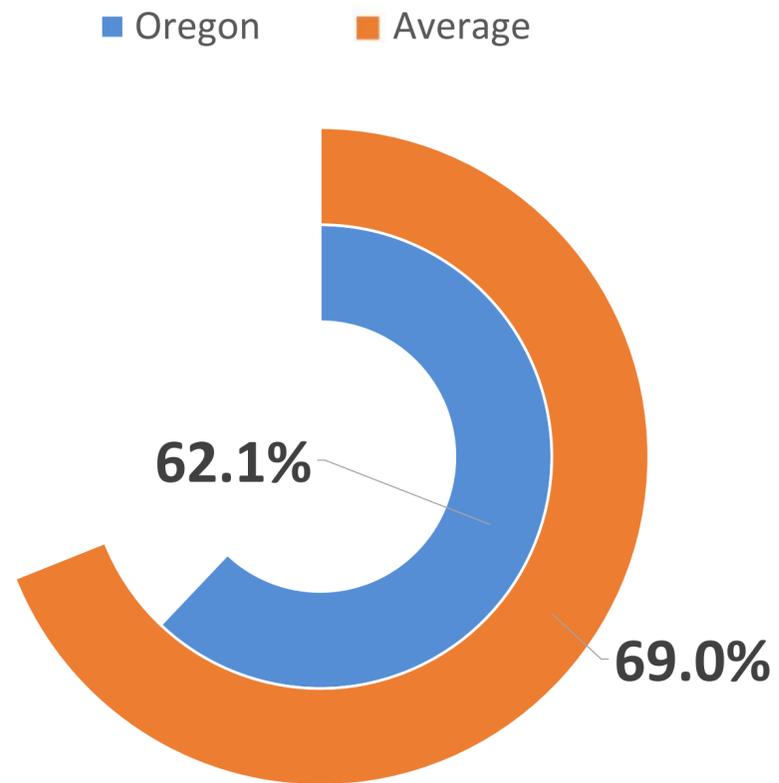
Question: While on this trip, approximately how much IN TOTAL did you spend PER DAY while in Oregon on each of the following? Please only INCLUDE spending inside Oregon and EXCLUDE any spending made outside Oregon or before arriving in Oregon. Base: All in-state respondents who visited after using the website; 898 responses.

Impact of Website on Destination Decision

TravelOregon.com effectively persuades its in-state users to travel within the state. In total, 62.1 percent of visitors agreed that the site indeed influenced them to take a trip within Oregon. This was slightly lower compared to the average for all in-state website users (69.0%).

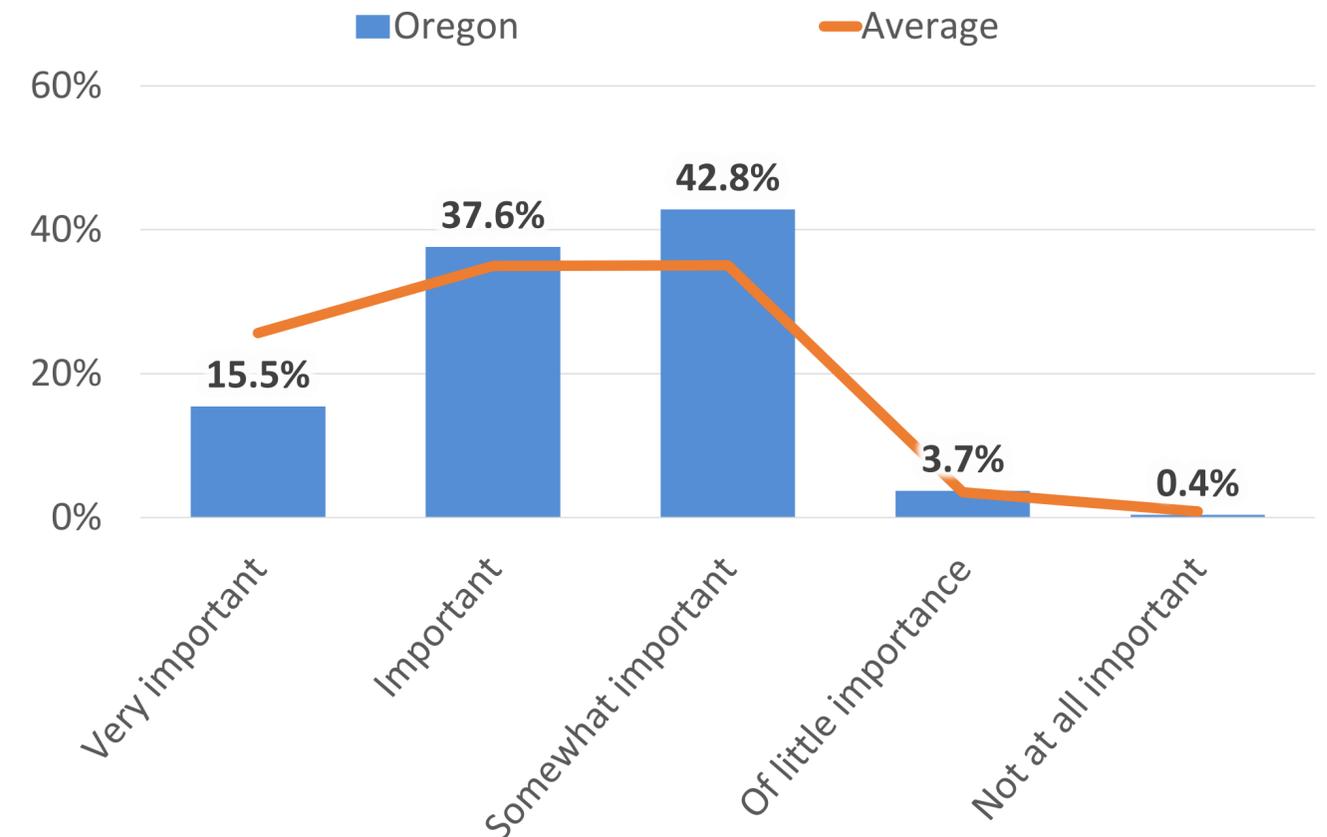
Amongst in-state residents who reported that the website influenced their decision to travel within the state, nearly half reported that the website was “Important” (37.6%) or “Very important” (15.5%) to this decision (53.1%).

Impact of Website on Destination Decision



Question: Do you feel that our website helped you make your decision to take this trip to Oregon?
Base: All in-state visitors who were potentially influenced by the website in the destination decision; 865 responses.

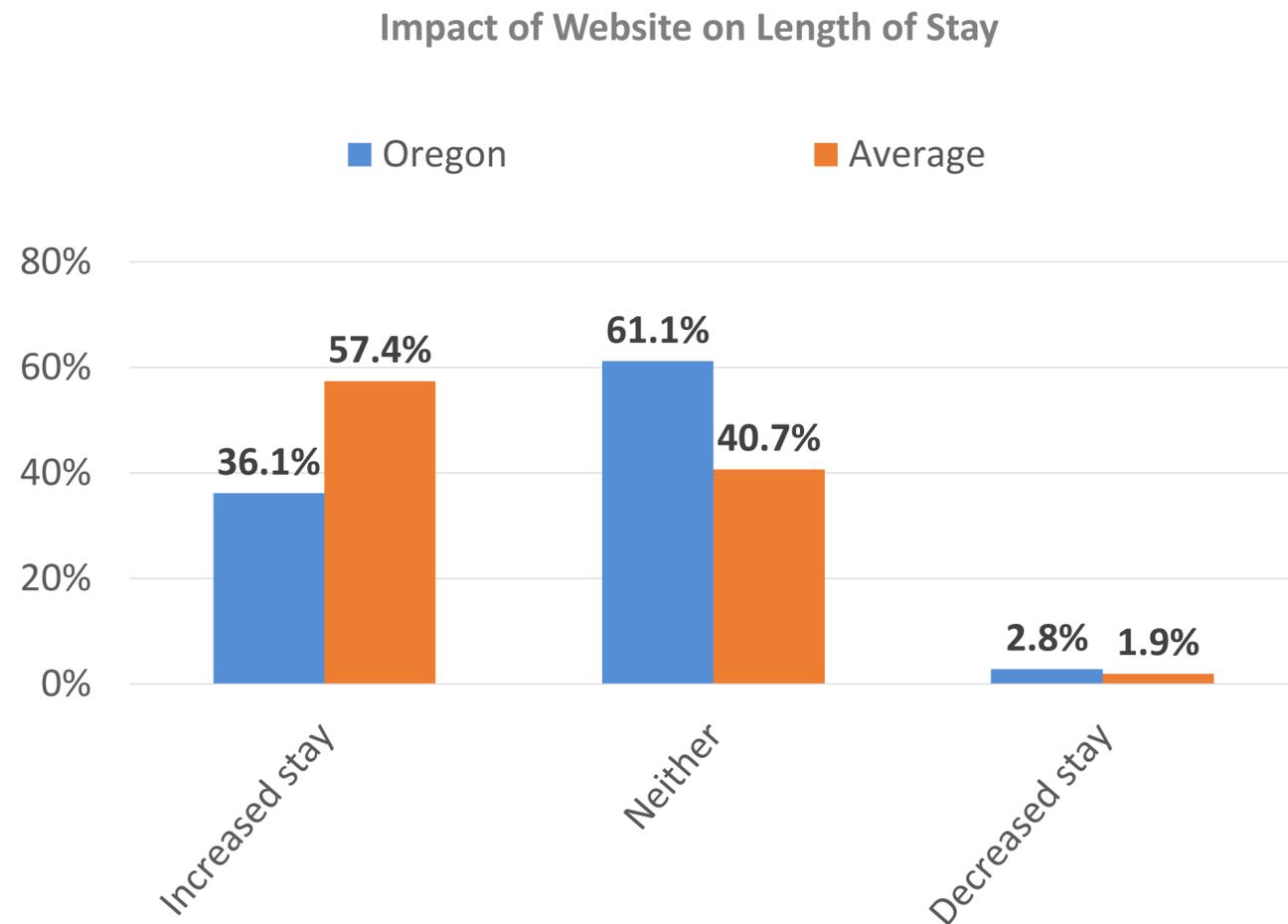
Importance of Website on Destination Decision



Question: How important was our website to you in making the decision to take this trip to Oregon? (Select one)
Base: All in-state visitors who were potentially influenced by the website in the destination decision; 537 responses.

Impact of Website on Length of Stay

Over one-third of in-state survey respondents who said that the website influenced the number of days they spent within Oregon reported that it increased their length of stay (36.1%). This was lower than the average, in which 57.4 percent of all in-state website users stated that the destination website influenced them to increase their length of stay.



Question: How did our website influence the number of days you spent in Oregon on this trip? (Select one) 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; 36 responses.

In-state survey respondents who reported that the website indeed increased their length of stay within Oregon did so by an average of 1.9 days. The typical in-state website user increased their length of stay by 2.1 days.

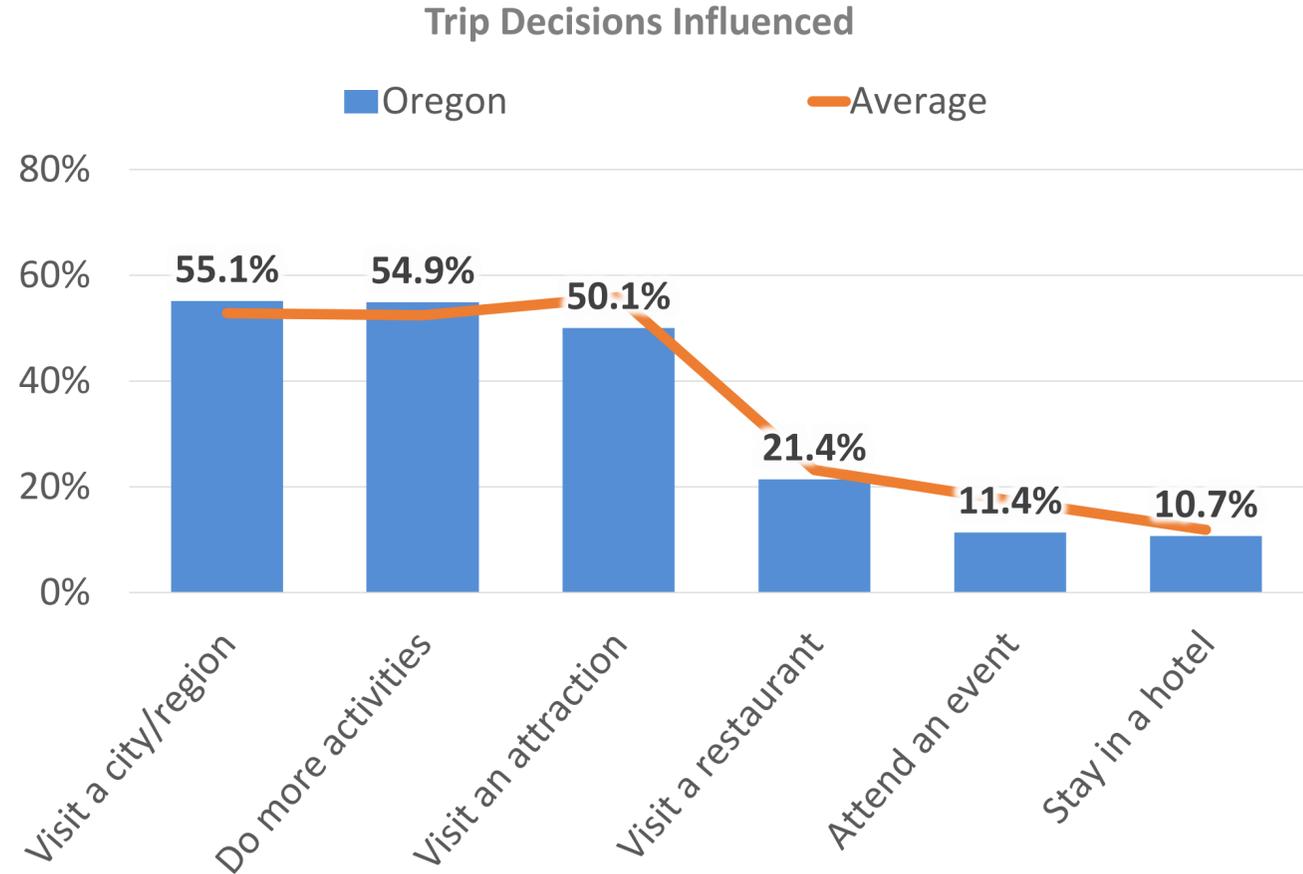
Average Increase on Length of Stay



Question: 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; 13 responses.

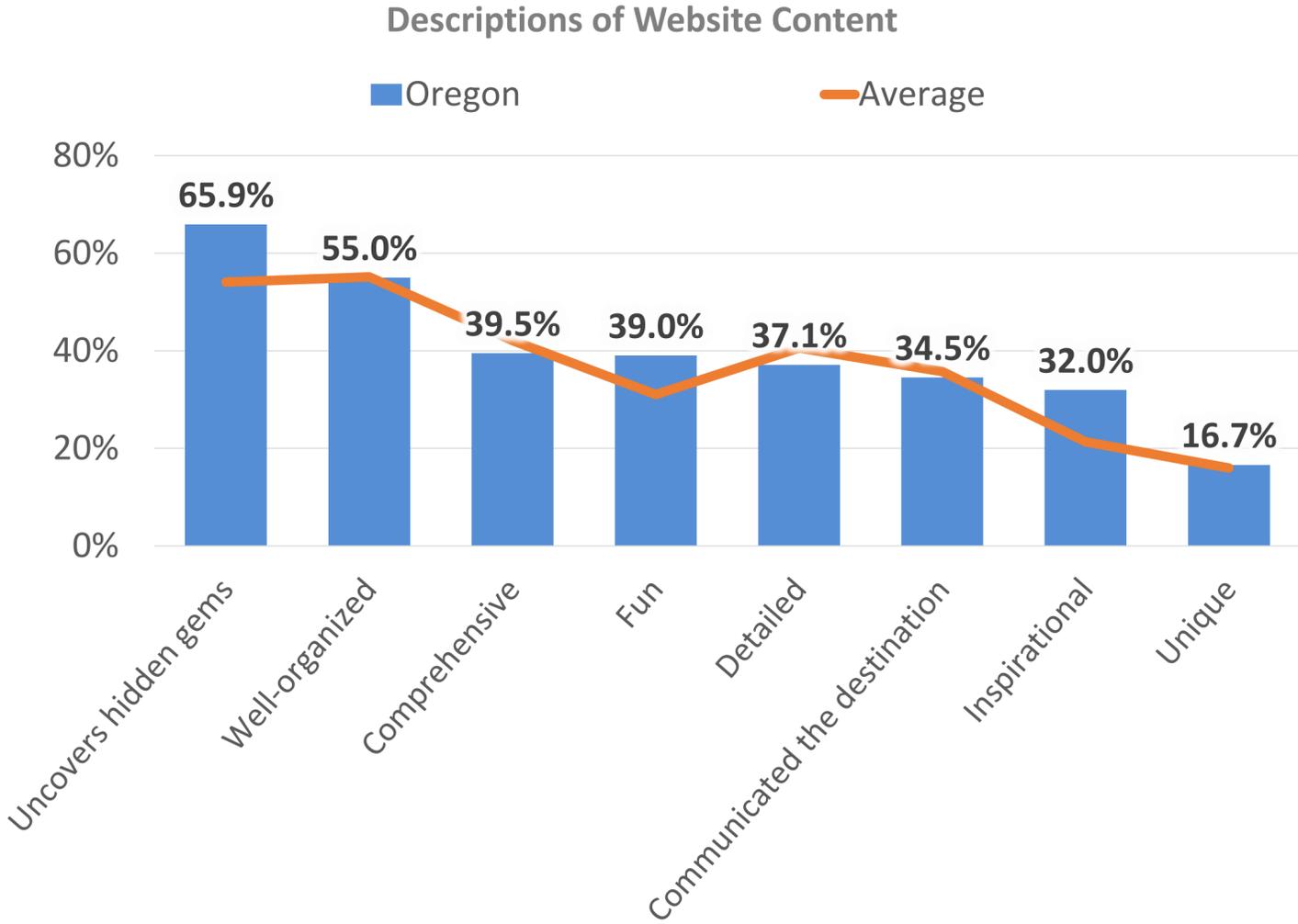
Trip Decisions Influenced and Descriptions of Website Content

TravelOregon.com also influences in-market activities. In-state website users who took a trip within Oregon visited a certain destination within the state (55.1%), did more activities (54.9%) and/or visited a specific attraction or museum (50.1%) as a result of content accessed on the site.



Question: Did the website influence you to do any of the following? (Select all that apply)
 Base: All in-state respondents who visited after using the website; 905 responses.

In-state visitors described TravelOregon.com as a resource that “uncovers hidden gems” (65.9%) and/or “well-organized” (55.0%). These website users also described the site as “comprehensive” (39.5%), “fun” (39.0%), “detailed” (37.1%), “communicated the destination” (34.5%) and/or “inspirational” (32.0%).

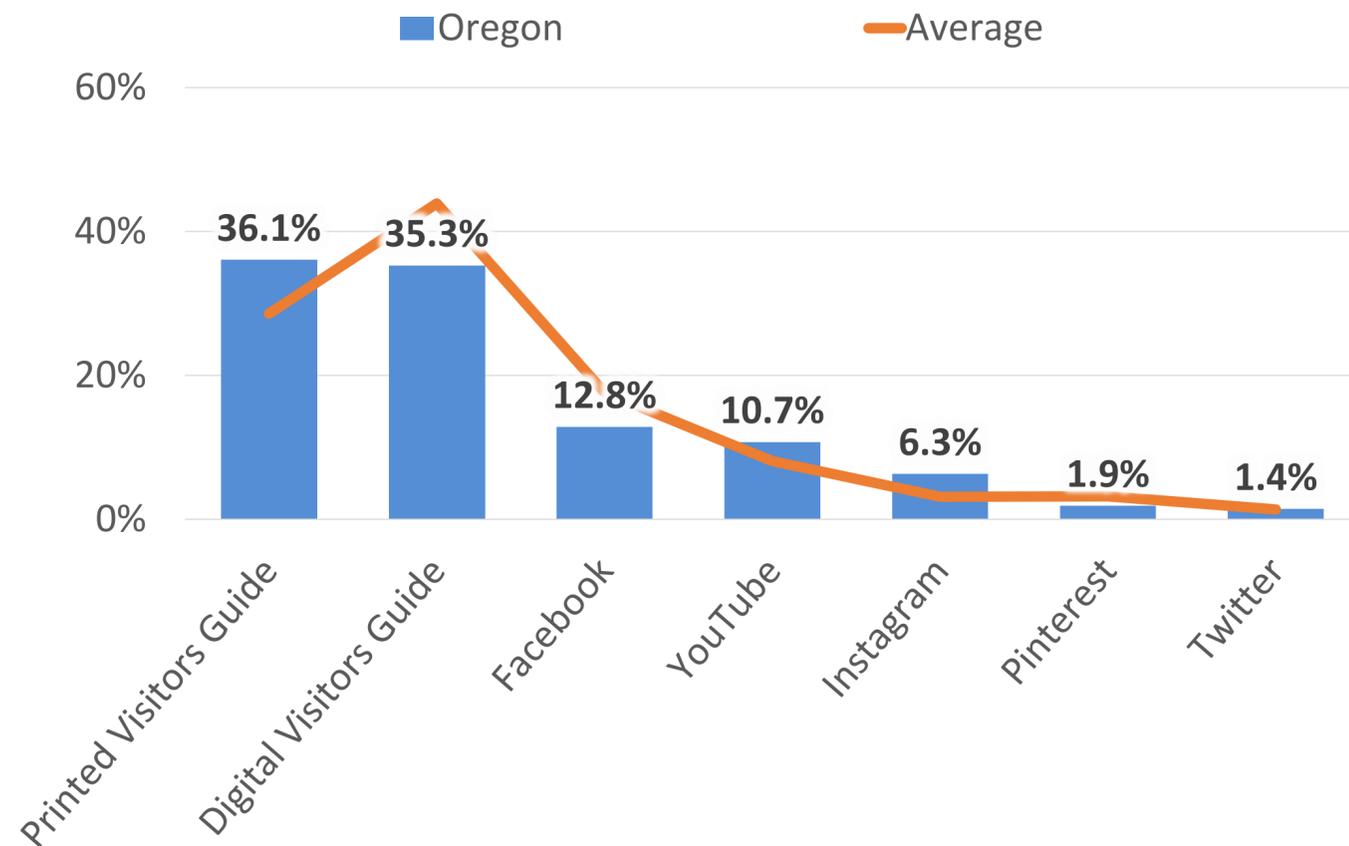


Question: Which of these words and phrases (if any) describe the content available on our website? (Select all that apply). Base: All in-state respondents who visited after using the website; 1,045 responses.

Official Resources Used and Likelihood to Recommend Website

In addition to TravelOregon.com, other official Travel Oregon resources were commonly used by in-state residents in the trip planning process. The most widely used of these was the Official Visitors Guide— in print (36.1%) and digitally (35.3%). Another 12.8 percent of website users who visited the destination also accessed the Travel Oregon official Facebook page, while 10.7 percent viewed YouTube video content while planning their Oregon trip.

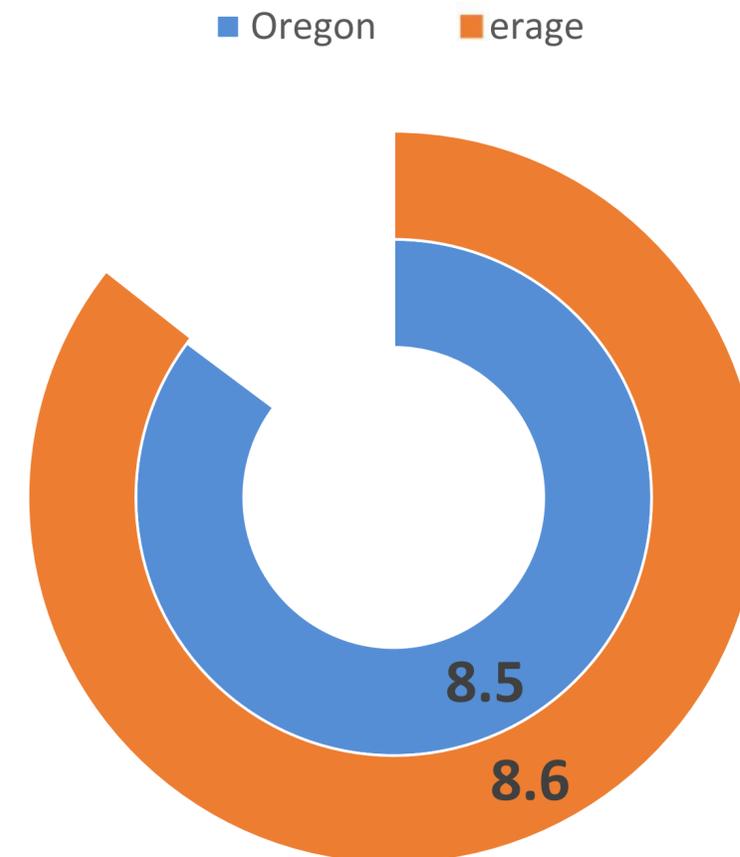
Official Travel Oregon Resources Used



Question: Which of these other resources did you use to plan your trip to Oregon? (Select all that apply) Base: All in-state respondents who visited after using the website; 904 responses.

TravelOregon.com is highly likely to be recommended by its in-state users to others planning a trip to Oregon. Using a 10-point scale, website users who visited rated their likelihood to recommend the website to others planning a trip to the destination an 8.5 on average (nearly identical to the average for all in-state website users).

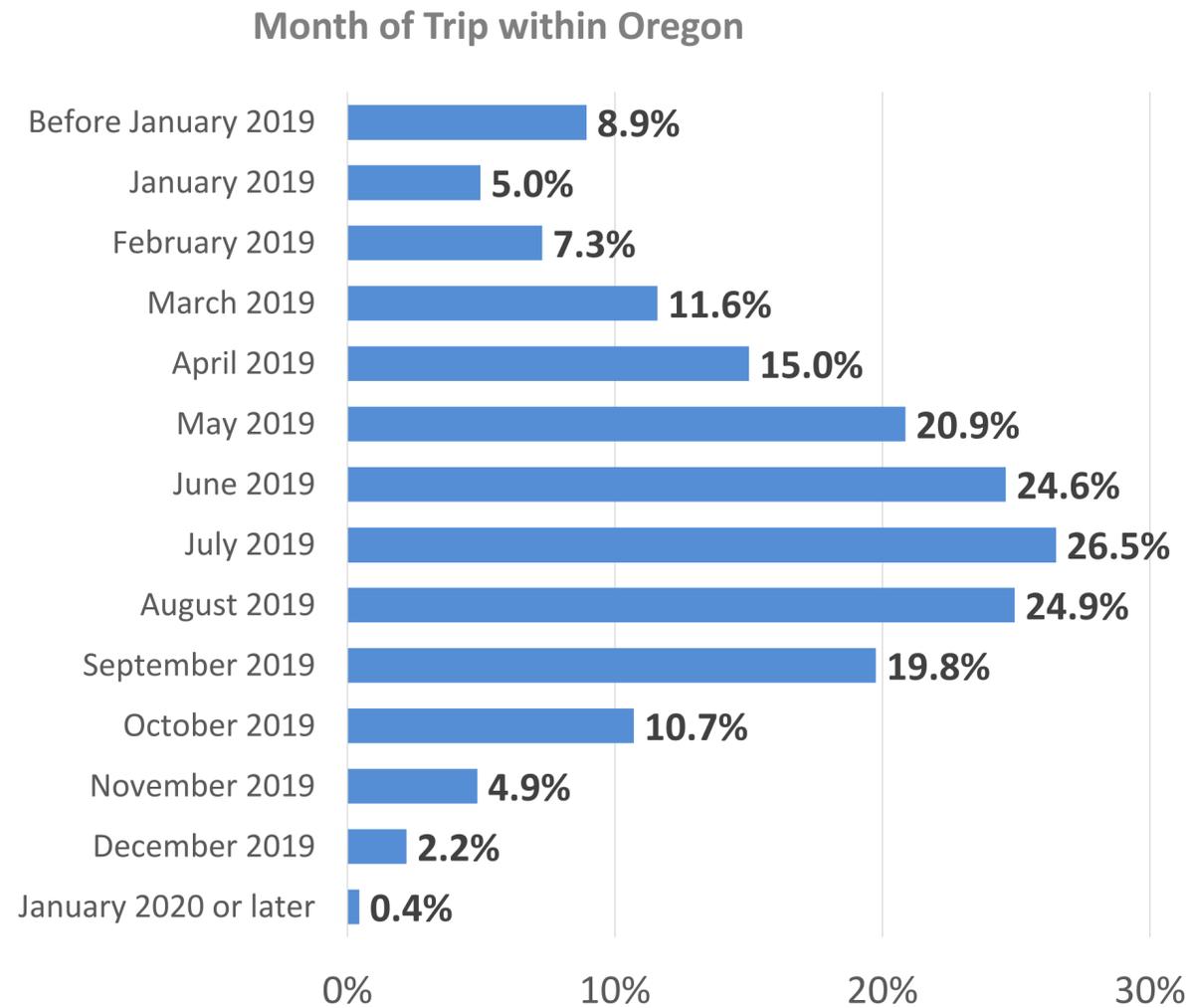
Likelihood to Recommend TravelOregon.com – 10 Point Scale



Question: How likely would you be to recommend TravelOregon.com to others planning a trip to or within Oregon? Base: All in-state respondents who visited after using the website; 1,045 responses.

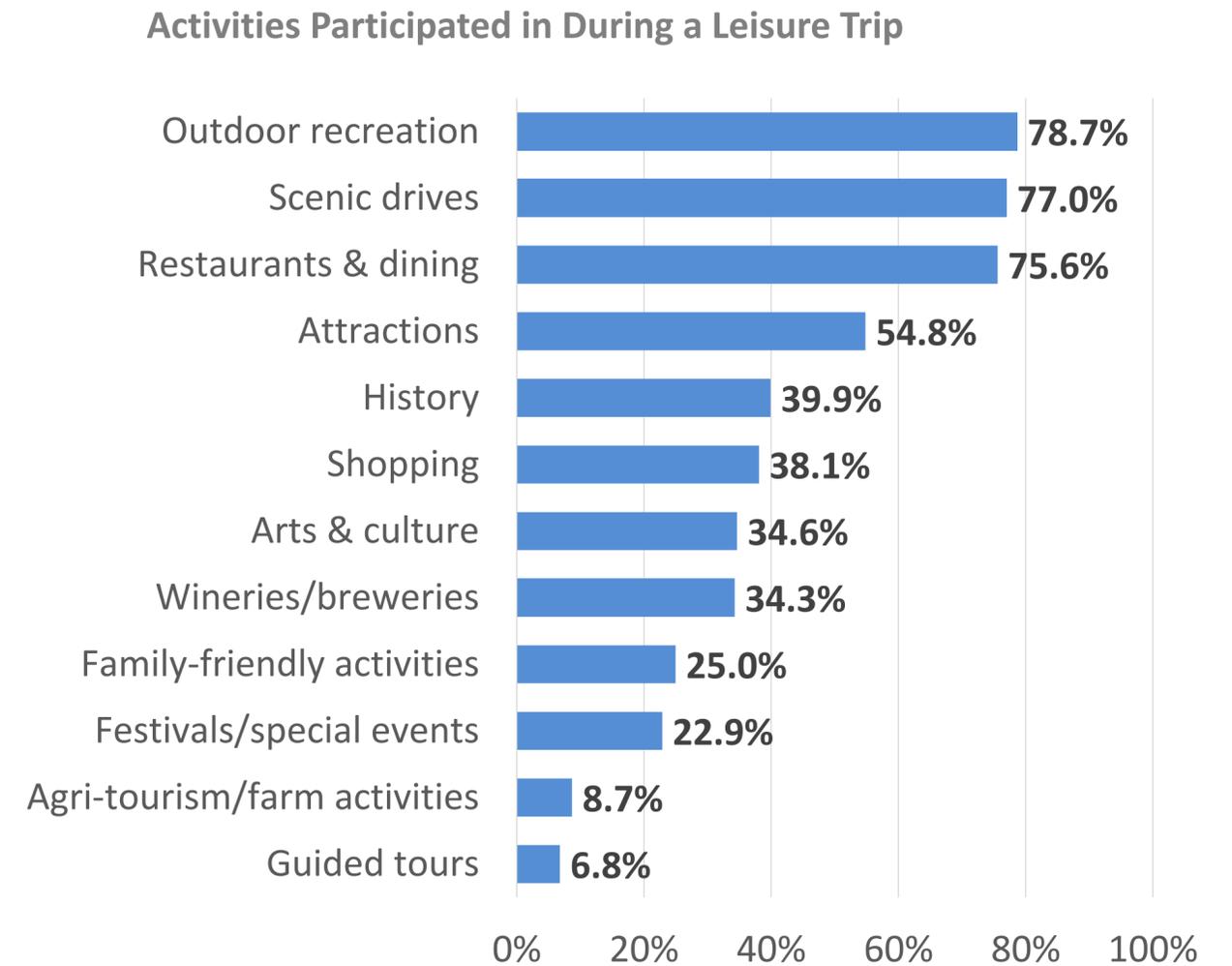
Custom Questions: Month of Trip & Activities Participated in During Trip

In-state visitors traveled within the state most often during the summer months of 2019. May (20.9%), June (24.6%), July (26.5%), August (24.9%) and/or September (19.8%) were selected as top months in-state visitors traveled within Oregon.



Question: In which month(s) did you take this trip? (Select all that apply)
 Base: All in-state follow-up respondents who visited Oregon; 906 responses.

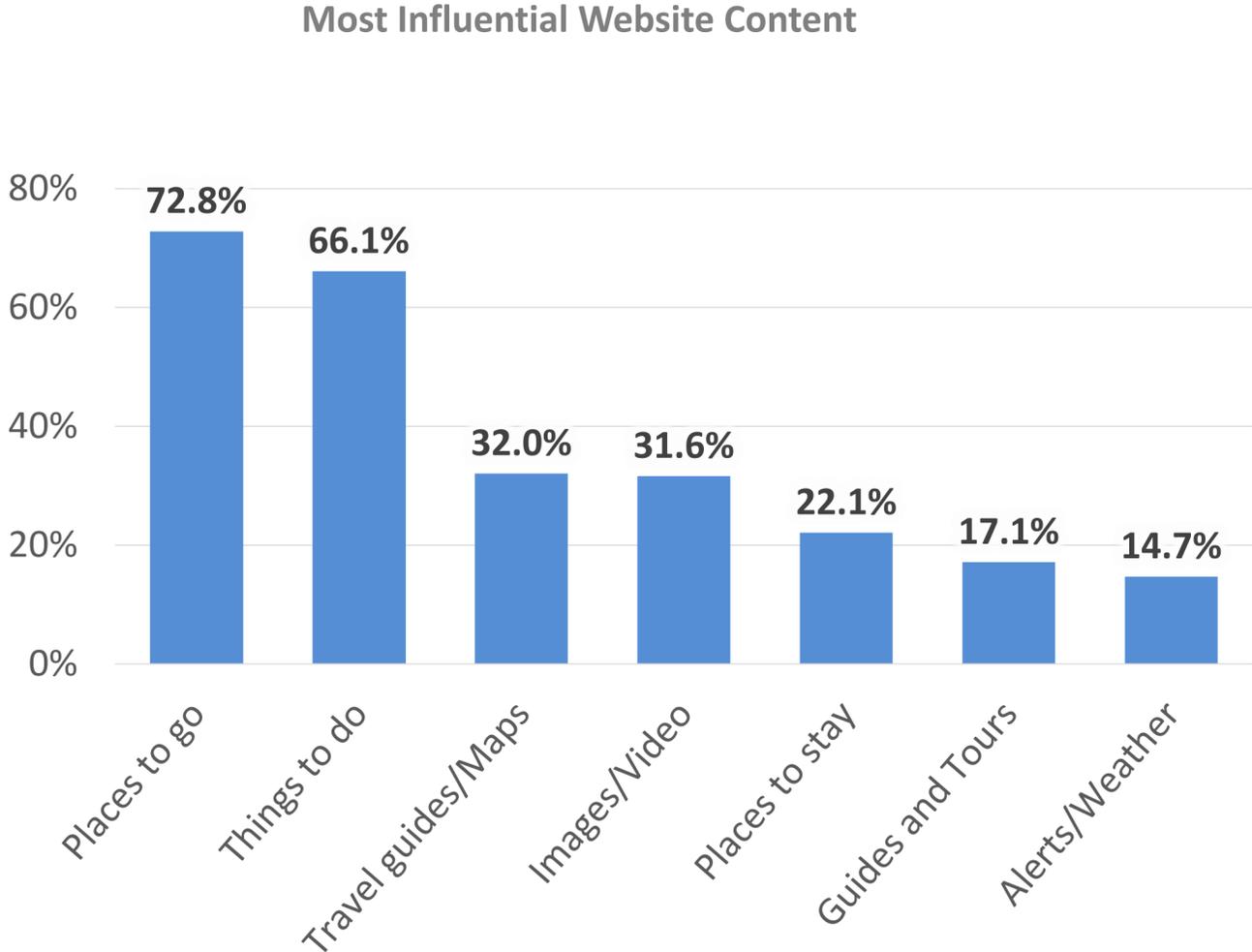
In-state visitors participated in a wide-array of activities during their trip. These visitors typically experienced outdoor recreation (78.7%), took scenic drives (77.0%) and/or dined (75.6%) during their Oregon trip. In-state visitors also went to general attractions (54.8%), learned about history (39.9%), went shopping (38.1%), experienced arts/culture (34.6%) and went to wineries/breweries (34.3%) during their trip within the state.



Question: Which of the following activities did you participate in during your trip within Oregon? (Select all that apply)
 Base: All in-state follow-up respondents; 1,045 responses.

Custom Question: Most Influential Website Content

Content specific to places to go (72.8%) and things to do (66.1%) was most influential in helping in-state website users plan their trip within Oregon. This was followed by travel guides/maps/Ask Oregon/visitor Centers (32.0%) and images/video (31.6%).

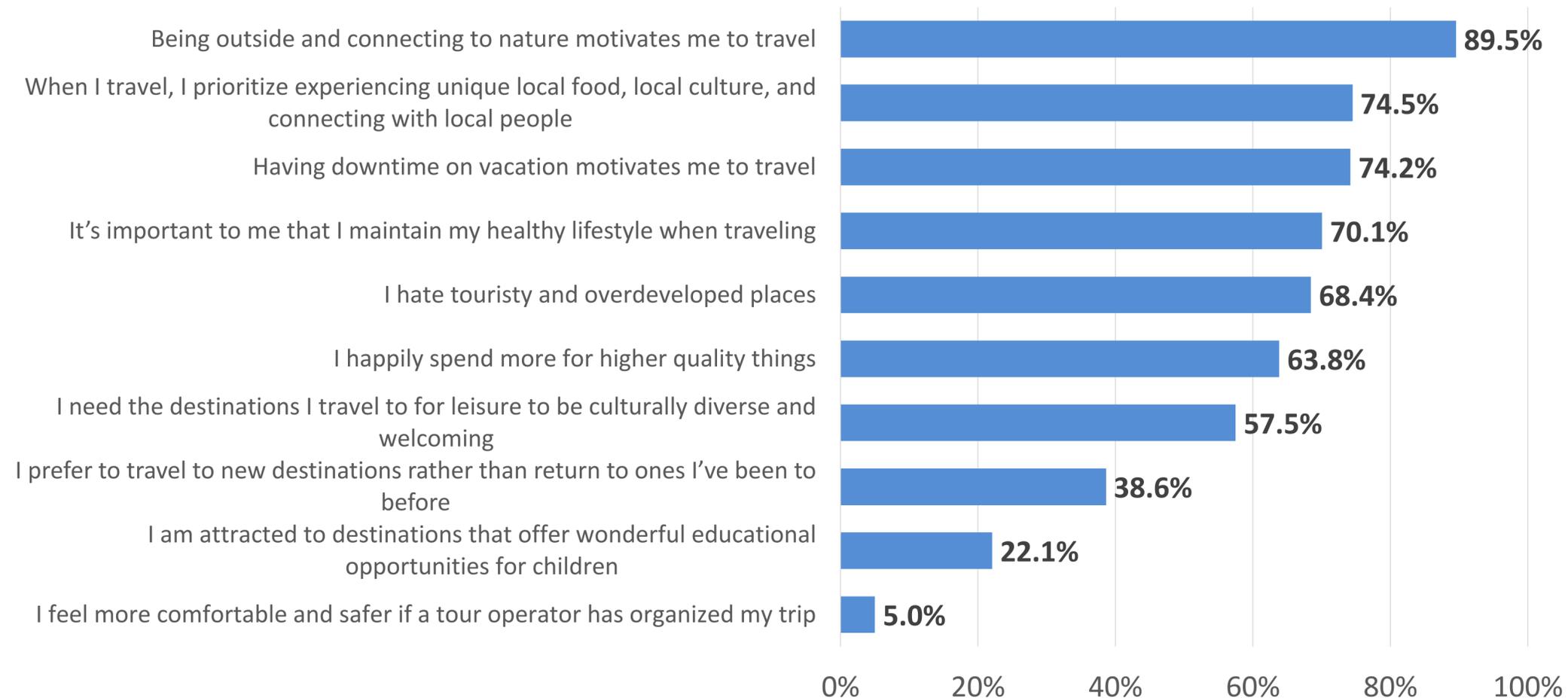


Question: What types of content on our website were most influential in planning this trip? (Select all that apply)
Base: All in-state respondents who visited after using the website; 905 responses.

Custom Question: Type of Leisure Traveler

In-state visitors were highly likely to describe themselves as travelers who prioritize being outside/connecting with nature (89.5%) during a leisure trip. Additionally, these visitors were more apt to prioritize local experiences (74.5%), like to have downtime (74.2%), maintain a healthy lifestyle (70.1%), hate touristy places (68.4%), spend more for higher quality things (63.8%) and expect a culturally diverse/welcoming destination (57.5%) while on a leisure trip.

Type of Leisure Traveler – Top 2 Box (4 or 5)



Question: How much do you agree with the following statements? Please use the 5-point scale where "1" equals "Strongly disagree" and "5" equals "Strongly agree" to rate your level of agreement with each statement.] Base: All in-state follow-up respondents; 1,042 responses.

Visitor Demographics

The table below shows the demographic profile of in-state website users who visited after using TravelOregon.com compared to all in-state website users.

	Oregon	Average
Female	63.5%	63.9%
Male	35.8%	33.7%
Mean age	53.9	51.9
Mean household income	\$81,267	\$80,336
Married/Partnered	72.5%	68.6%
Single	21.5%	24.7%
% with Children under 18	13.1%	18.8%
College graduate	69.9%	63.7%
Caucasian ethnicity	85.4%	78.8%
Non-Caucasian ethnicity	8.4%	14.8%

Base: All in-state respondents who visited after using the website; 906 completed surveys.



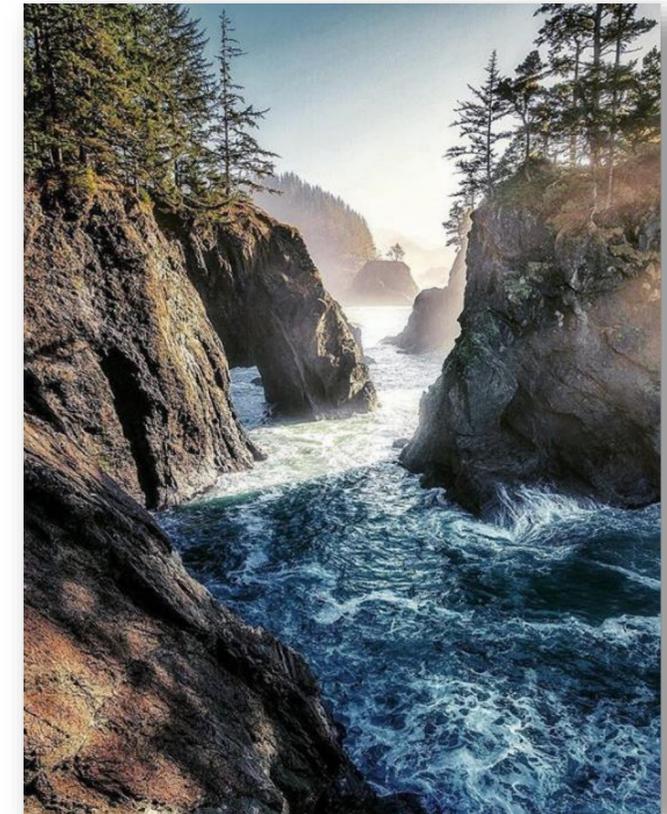
WEBSITE ANALYTICS: TRAVELOREGON.COM DETAILED FINDINGS

Website Analytics Key Definitions

The following pages present data from TravelOregon.com's website analytics for website users. The following terms are used within this section and defined below:

- **Potential visitors** - website users who were gathering trip information when they accessed TravelOregon.com.
 - **Decided** - potential visitors who already made the decision to visit the state of Oregon when they accessed TravelOregon.com.
 - **Interested** - potential visitors who were interested in visiting the state of Oregon when they accessed TravelOregon.com but have not yet made any firm travel plans.
 - **Considering** – potential visitors who were simply considering destinations for a leisure trip when they accessed TravelOregon.com.
 - **Searching for Inspiration Objective** – potential visitors who visited the website to search for inspiration.
 - **Gathering Information Objective** - potential visitors who visited the website to gather information on places to go and/or things to do.
 - **Planning Trip Itinerary Objective** - potential visitors who visited the website to compare features of places to go and/or things to do for trip itinerary.
 - **In-state** - website users who reside inside the state of Oregon.
 - **Out-of-state** - website users who reside outside the state of Oregon.
 - **Millennials** - potential visitors between the ages of 18 to 36.
 - **Generation X** - potential visitors between the ages of 37 to 52.
 - **Baby Boomers** - potential visitors between the ages of 53 to 71.

- **Non-Potential visitors**- website users who were NOT gathering trip information when they accessed TravelOregon.com.



Above: Image of Oregon Coast from @TravelOregon on Instagram.

Potential and Non-Potential Visitors—Website User Profile

A majority of TravelOregon.com users were potential visitors to Oregon. The information below shows the average number of page views, average session duration and the percentage of new TravelOregon.com users who were potential visitors and not potential visitors. On average, potential visitors viewed more pages (3.7 vs. 2.9) and spent more time (7:33 vs. 4:31 minutes) on site compared to those who were not potential visitors.

Average Number of Pages

Average Session Duration

Percent of New Users

POTENTIAL VISITORS (64.4% of all users)



3.7

00:07:33

93.3%

Of potential visitors were new users

NOT POTENTIAL VISITORS (35.6% of all users)



2.9

00:04:31

94.3%

Of non-potential visitors were new users

WEBSITE ANALYTICS

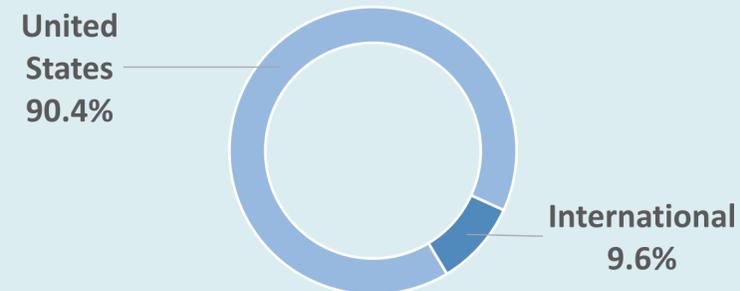
IN-DEPTH REVIEW OF POTENTIAL VISITORS

Potential Visitors—Residence

TravelOregon.com attracts both international and domestic residents. The information below shows the residence of TravelOregon.com website users who were using the website to gather information for a trip.

Of the potential visitors who lived outside the United States (9.6%), Canada, the United Kingdom and the Netherlands were the top countries of residence. Of the potential visitors who were U.S. residents (90.4%), Seattle, Boise and Los Angeles were the top U.S. cities outside the state of Oregon.

Residence



Top Countries*



Canada (49.0%)
United Kingdom (15.0%)
Netherlands (4.4%)

*% of all international potential visitors.
Out of 53 countries.

Top U.S. Cities**



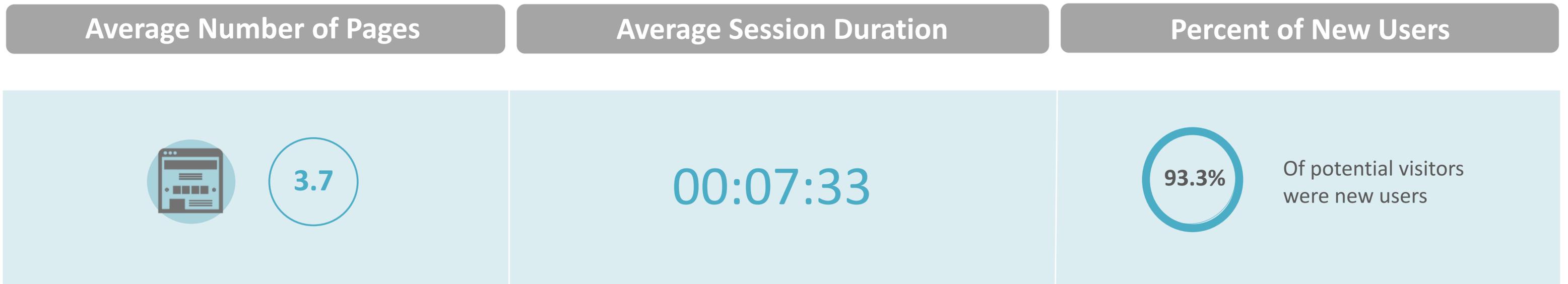
Seattle (3.2%)
Boise (1.0%)
Los Angeles (0.8%)

** % of all domestic potential visitors.
Out of 1,730 U.S. cities.

Potential Visitors—Website Use

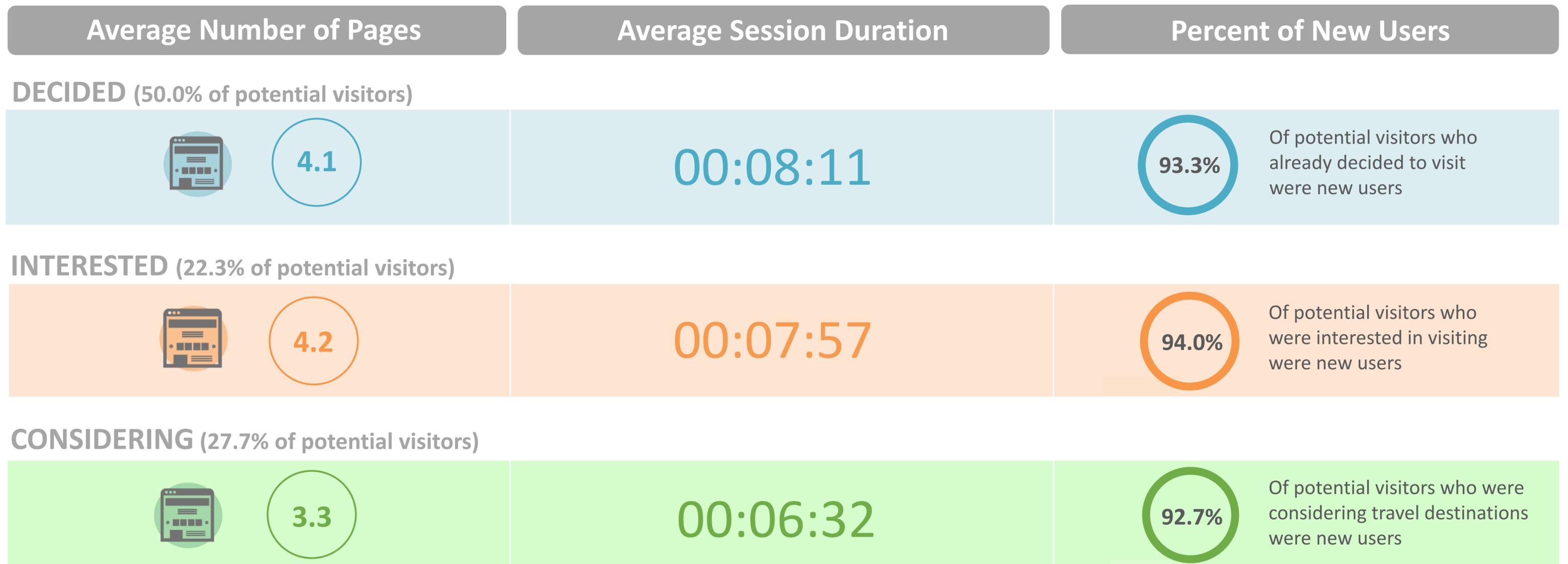
Potential visitors were engaged with TravelOregon.com. The information below shows the average number of page views, average session duration and the percentage of new TravelOregon.com users who were gathering information for a trip on the website.

On average, potential visitors viewed 3.7 pages and spent over 7 minutes on TravelOregon.com. A majority of website users were first-time users of TravelOregon.com (93.3%).



Travel Planning Stage—Website Use

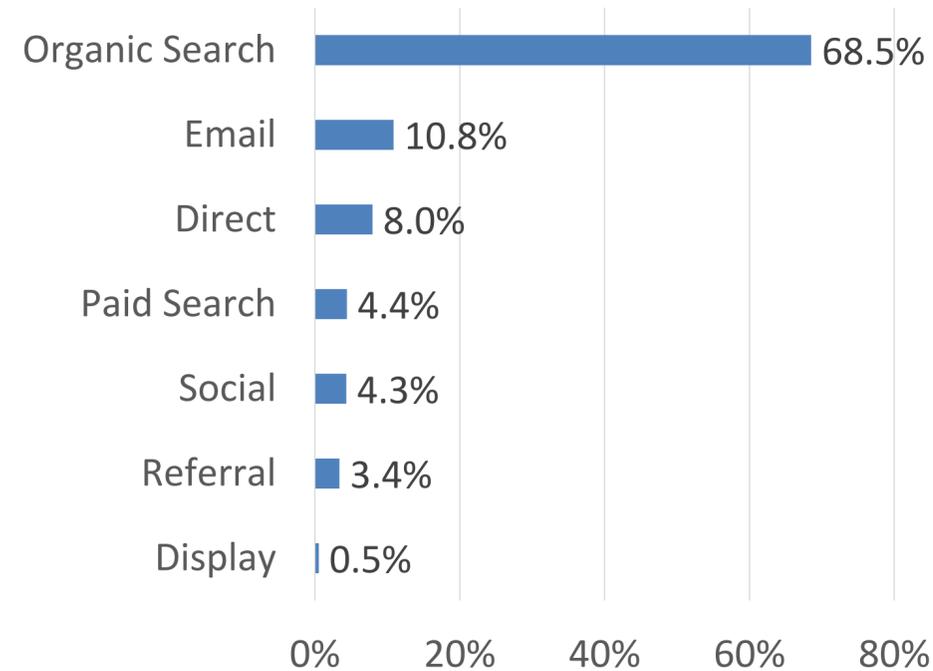
On average, TravelOregon.com users in each planning stage spent at least 6 minutes and viewed approximately 3 pages on the website. The information below shows the average number of page views, average session duration and percent of new users for potential visitors who were in the travel planning process. On average, website users who were interested in visiting the state and those who already decided to visit Oregon viewed the most pages on the site (4.2 and 4.1, respectively), while those who already decided to visit Oregon spent the most time on the website (at 8:11 minutes on average).



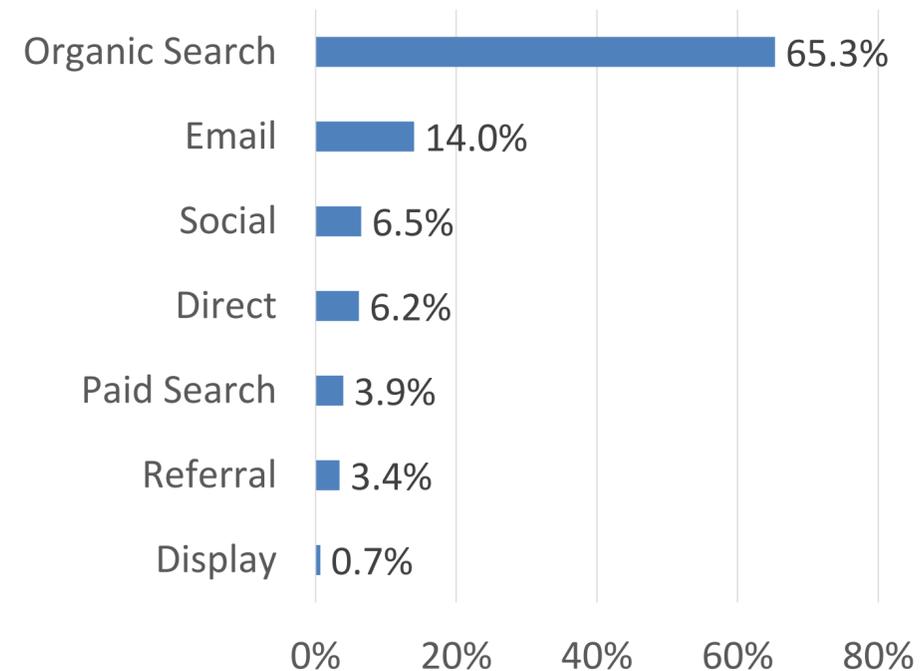
Travel Planning Stage—Site Acquisition

Potential visitors who were subject to influence by TravelOregon.com in making a decision to visit (those in the interested and considering stages) were more likely to arrive on the site through email and social media compared to those who have already decided to visit Oregon. The information below shows the primary sources for site acquisition for potential visitors. Organic search was the top method of arrival for potential visitors in each travel planning stage, and highest for those who decided to visit and those interested in visiting Oregon (68.5% and 65.3%, respectively). Those considering destinations were more apt to arrive to TravelOregon.com through email (18.1%) and social media (9.8%) compared to other travel planning stages.

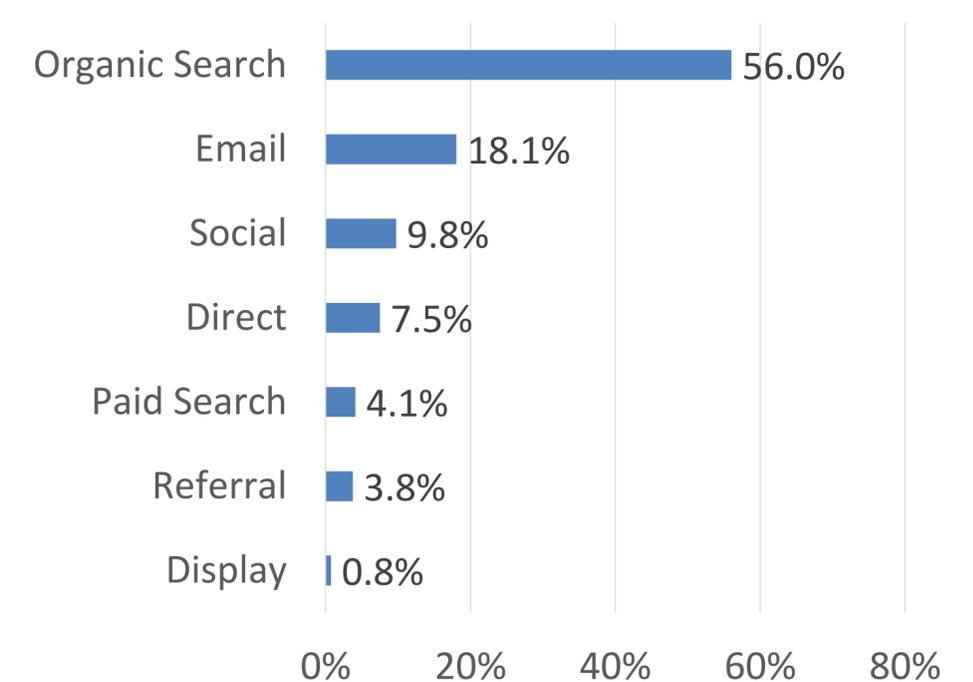
DECIDED SITE ACQUISITION



INTERESTED SITE ACQUISITION



CONSIDERING SITE ACQUISITION



Travel Stages—Engagement

While website users in each travel stage were highly engaged with the Travel Guides and Top Ten Don't Miss Spots on the Oregon Coast pages, there were differences seen in pages of engagement by travel stage. The top pages of engagement are calculated based on a Destination Analysts' metric which multiplies average number of page views by average time on page for potential visitors in each travel stage. Those who have already decided to visit were more apt to engage with the Before Visiting Multnomah Falls page, while those in the interested planning stage engaged more with the Oregon Coast page and those considering destinations were more likely to engage with the Soak in Oregon's Magical Hot Springs page. Potential visitors who were subject to influence by TravelOregon.com in making a decision to visit (those in the interested and considering stages) were more likely to engage with the Only Slightly Exaggerated page.

See the next page for top pages of engagement for each travel stage.

TOP PAGES OF ENGAGEMENT



Everything You Need to Know Before Visiting Multnomah Falls
EVERYTHING YOU NEED TO KNOW BEFORE VISITING MULTNOMAH FALLS



Only Slightly Exaggerated



 **OREGON COAST**



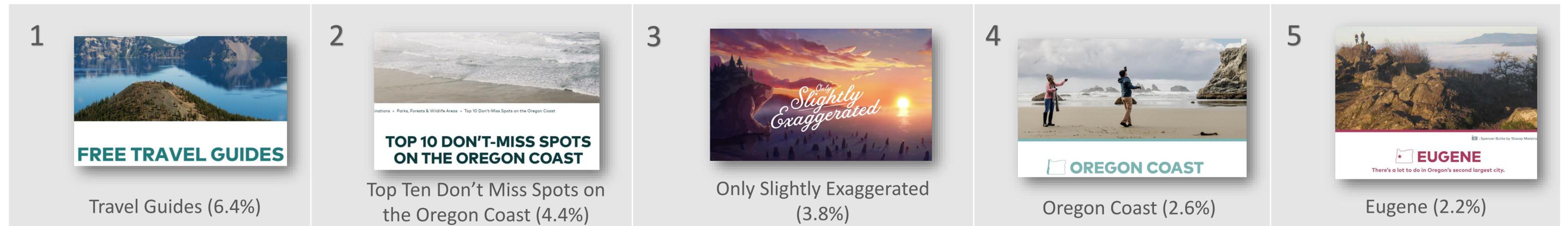
Favorite Trips » Soak in Oregon's Magical Hot Springs
SOAK IN OREGON'S MAGICAL HOT SPRINGS

Travel Stages—Engagement (continued)

DECIDED TOP PAGES OF ENGAGEMENT



INTERESTED TOP PAGES OF ENGAGEMENT



CONSIDERING TOP PAGES OF ENGAGEMENT



Objectives for Using Website—Website Use

Website use on TravelOregon.com was similar by primary objective for using TravelOregon.com. The information below shows the average number of page views, average session duration and percent of new users for potential travelers either searching for inspiration, gathering information or planning a trip itinerary on the site. On average, those searching for inspiration viewed the most pages (4.2 pages) and spent slightly more time on average (8:50 minutes) on the site compared to the other segments.

Average Number of Pages

Average Session Duration

Percent of New Users

SEARCHING FOR INSPIRATION (38.9% of potential visitors)



4.2

00:08:50

91.8%

Of those searching for inspiration were new users

GATHERING INFORMATION (43.2% of potential visitors)



3.9

00:08:14

93.3%

Of those gathering information were new users

PLANNING TRIP ITINERARY (18.0% of potential visitors)



3.6

00:08:35

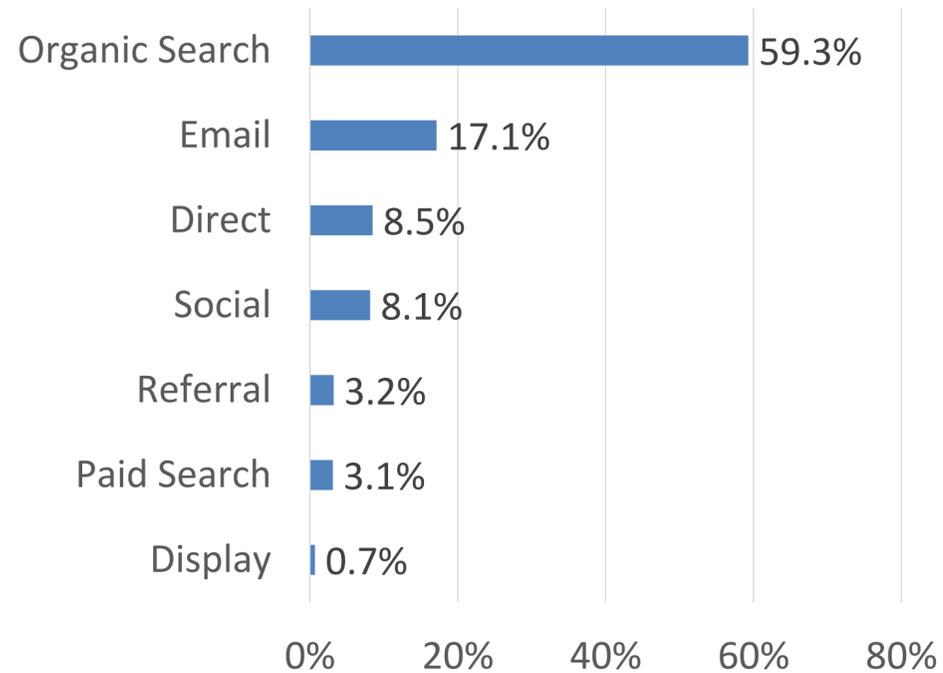
91.2%

Of those planning a trip itinerary were new users

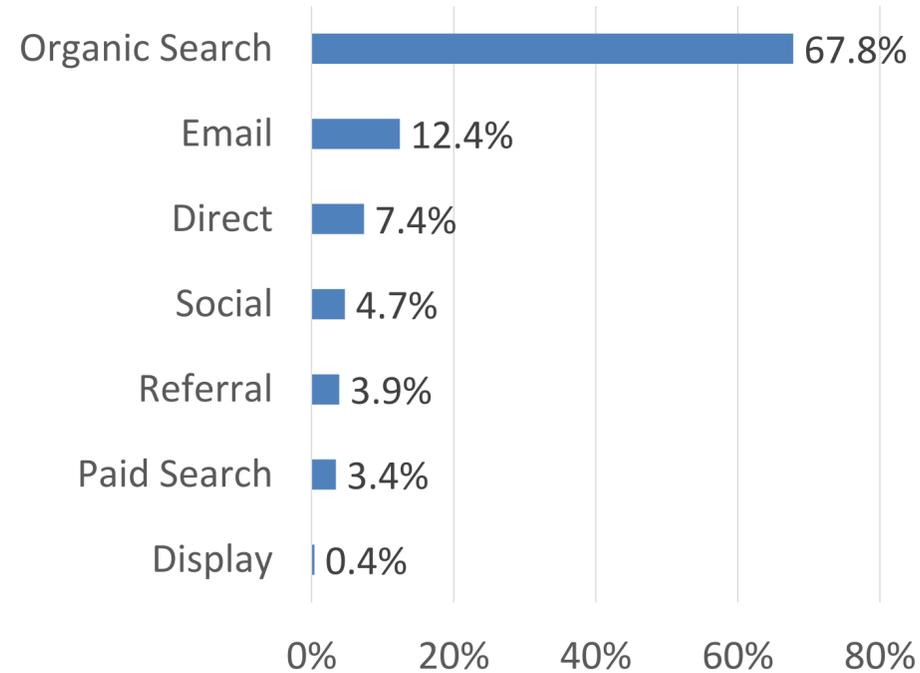
Objectives for Using Website—Site Acquisition

Those searching for inspiration and those planning a trip itinerary were more likely to arrive at TravelOregon.com via email compared to those gathering information. The charts below illustrate the primary sources of site acquisition for potential visitors. Organic search was the top method of arrival for potential visitors in each segment, and highest for those who were gathering information (67.8%). In addition to email, those planning a trip itinerary and those searching for inspiration were more likely to arrive at the site through social media (8.4% and 8.1%, respectively) compared to those gathering information.

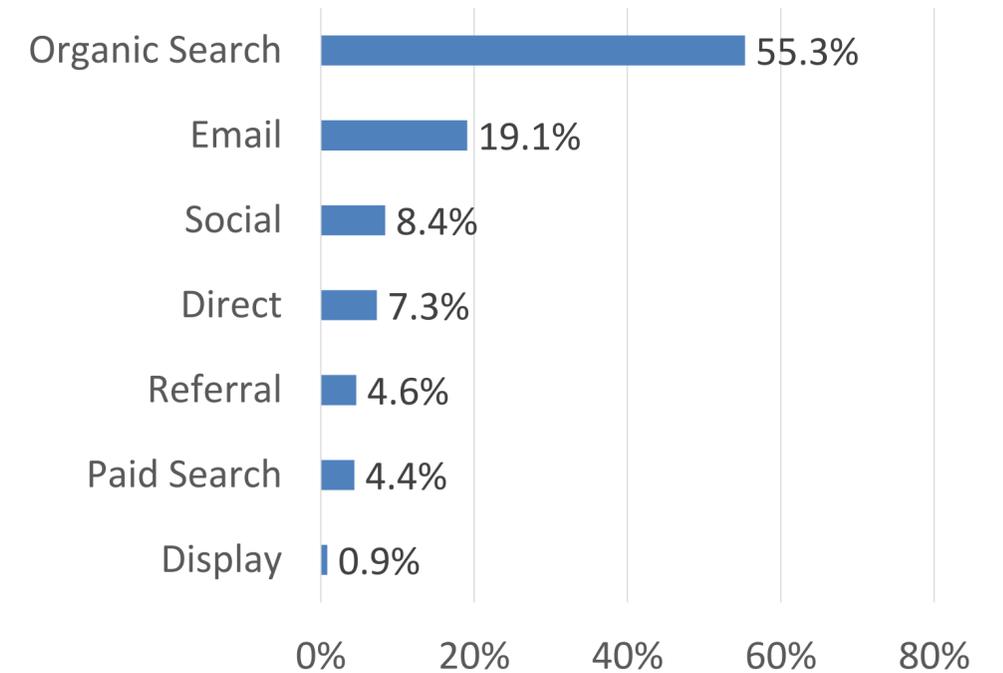
SEARCHING FOR INSPIRATION SITE ACQUISITION



GATHERING INFORMATION SITE ACQUISITION



PLANNING TRIP ITINERARY SITE ACQUISITION



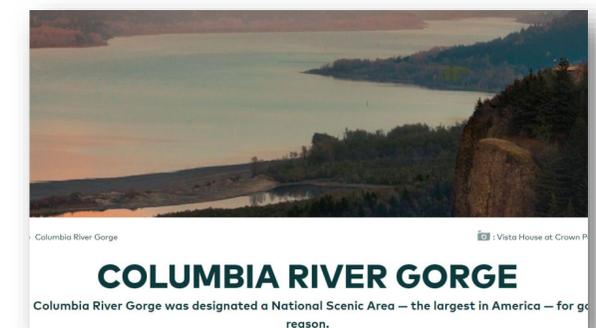
Objectives for Using Website—Engagement

While website users coming to the site for a specific objective were highly engaged with the Only Slightly Exaggerated, Travel Guides and Top Ten Don't Miss Spots on the Oregon Coast pages, those searching for inspiration were more apt to engage with the 7 Things Not to Miss in Lincoln City page.

Additionally, those on the site gathering information engage more often with the Before Visiting Multnomah Falls and Columbia River Gorge pages, while those planning a trip itinerary were more likely to engage with the Soak in Oregon's Magical Hot Springs page. Potential visitors searching for inspiration and planning a trip itinerary were most likely to engage with the Only Slightly Exaggerated page compared to those on TravelOregon.com gathering information.

See the next page for top pages of engagement for each segment by objective.

TOP PAGES OF ENGAGEMENT

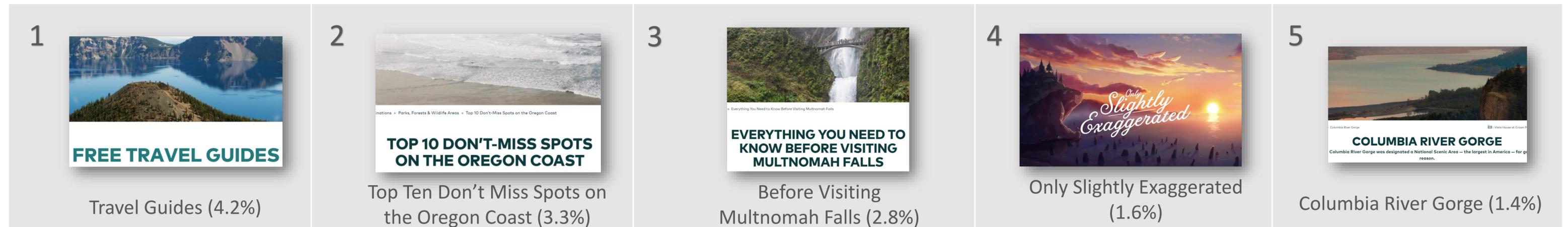


Objectives for Using Website—Engagement (continued)

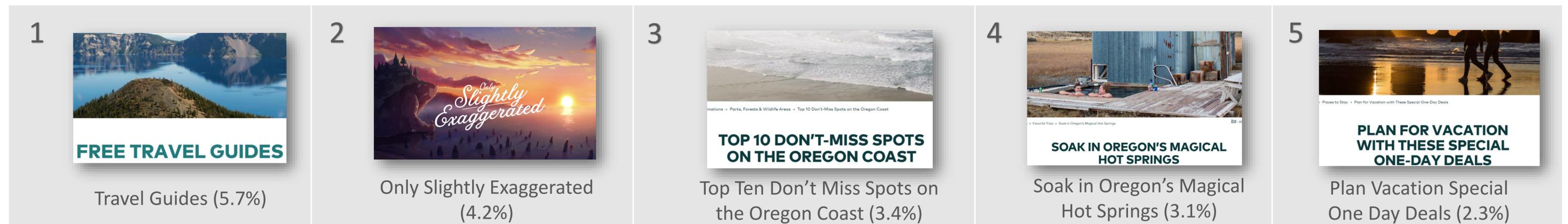
SEARCHING FOR INSPIRATION TOP PAGES OF ENGAGEMENT



GATHERING INFORMATION TOP PAGES OF ENGAGEMENT



PLANNING TRIP ITINERARY TOP PAGES OF ENGAGEMENT



In-State and Out-of-State—Website Use

TravelOregon.com website use was similar for in-state and out-of-state residents. The information below shows the average number of page views, average session duration and percent of new users for TravelOregon.com website users gathering trip information who were in-state residents and out-of-state residents. On average, out-of-state residents viewed slightly more pages (3.8), while in-state residents spent more time (7:53 minutes) on site.

Average Number of Pages

Average Session Duration

Percent of New Users

IN-STATE (34.2% of all users)



3.6

00:07:53

92.1%

Of in-state website users were new users

OUT-OF-STATE (65.8% of all users)



3.8

00:07:31

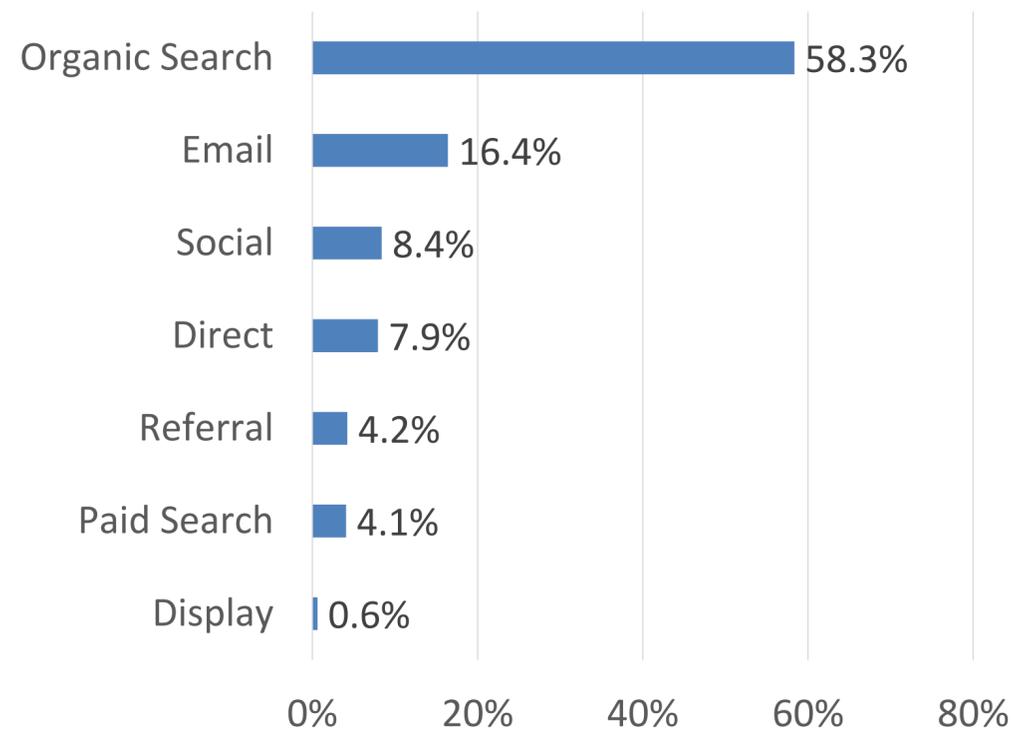
93.9%

Of out-of-state website users were new users

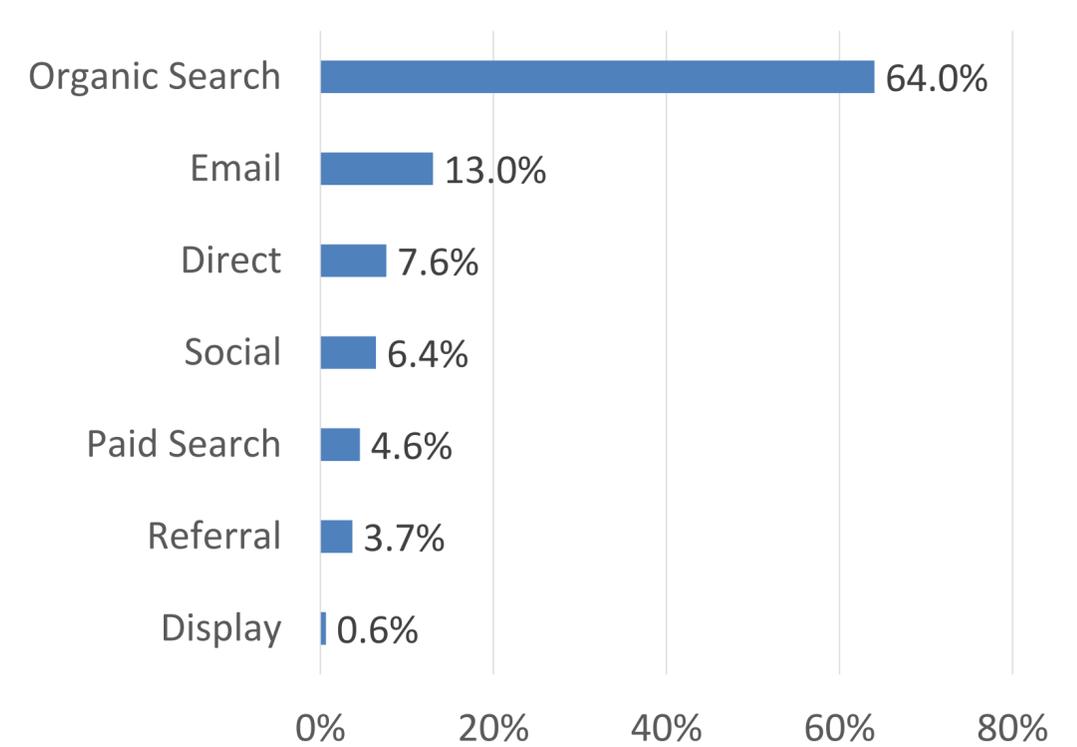
In-State and Out-of-State—Site Acquisition

There were minor differences in site acquisition between in-state and out-of-state residential audiences. The information below shows the primary sources for site acquisition for TravelOregon.com website users gathering trip information who were in-state residents and out-of-state residents. The most common method of arrival for both segments was organic search, and highest for out-of-state residents (64.0%). In-state residents were more inclined to arrive via email (16.4%) and social media (8.4%).

IN-STATE SITE ACQUISITION



OUT-OF-STATE SITE ACQUISITION



In-State and Out-of-State—Engagement

Both in-state and out-of-state residents were similarly engaged with top pages on TravelOregon.com. The information below shows the top pages of engagement for TravelOregon.com website users gathering trip information who were in-state residents and out-of-state residents. Both in-state and out-of-state residents were similarly engaged with the Travel Guides, Only Slightly Exaggerated, Top Ten Don't Miss Spots on the Oregon Coast Before Visiting Multnomah Falls and Soak in Oregon's Magical Hot Springs pages.

IN-STATE TOP PAGES OF ENGAGEMENT

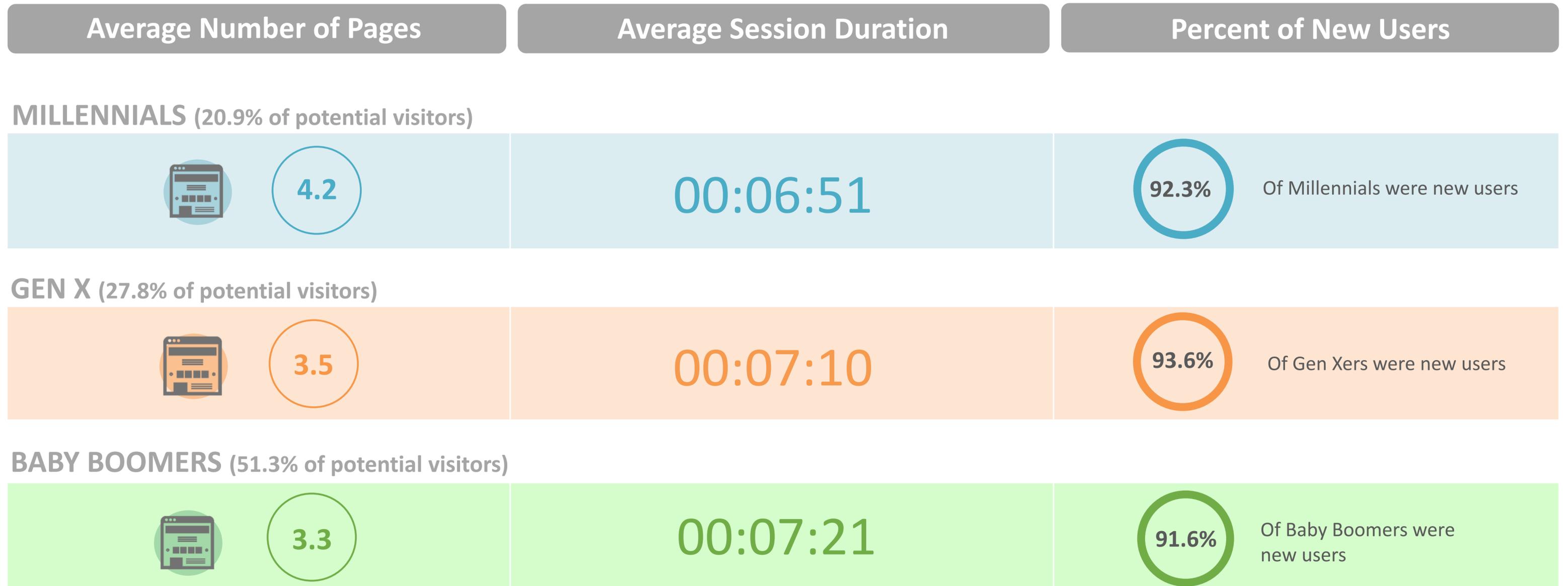


OUT-OF-STATE TOP PAGES OF ENGAGEMENT



Generations—Website Use

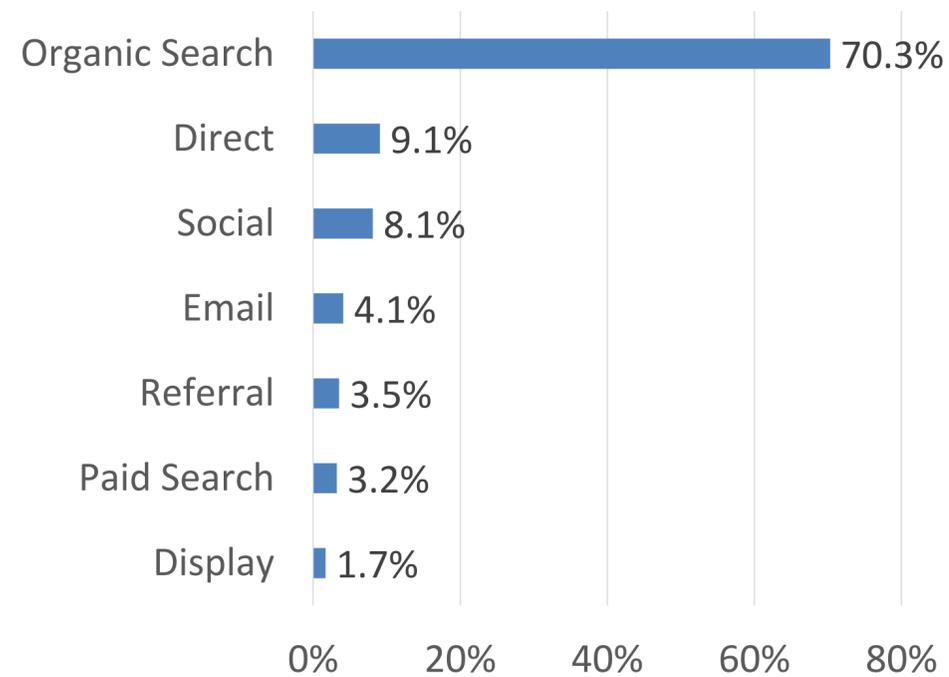
TravelOregon.com website usage differs across generations. The information below shows the average number of page views, average session duration and percent of new users for Millennials, Gen Xers and Baby Boomers gathering trip information on the site. Millennials viewed the most pages (4.2 pages) and spent the least amount of time on the site (06:51), while Baby Boomers viewed the least amount of pages (3.3 pages) and spent the most time on site (07:21).



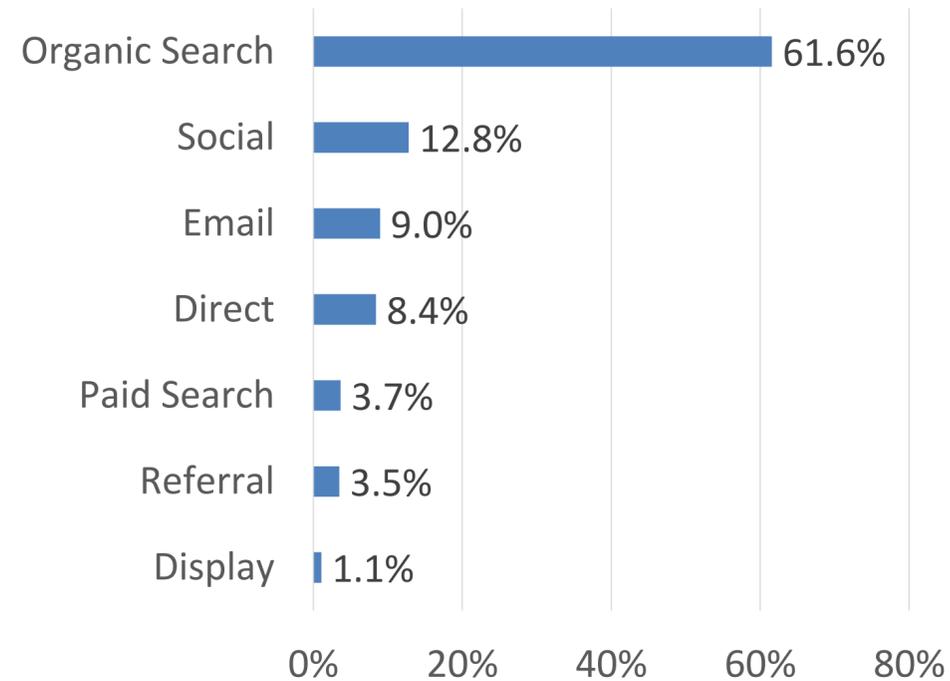
Generations—Site Acquisition

Site acquisition was relatively different by generation. Organic search was the top method of arrival for all generations, and highest for Millennials (at 70.3%) compared to other generations. Meanwhile, Baby Boomers were more likely to arrive at TravelOregon.com via email (24.3%) compared to other generations, while Gen Xers were more likely to arrive to the website through social media (12.8%). Baby Boomers were the likeliest generation to arrive at the site via referral (4.5%).

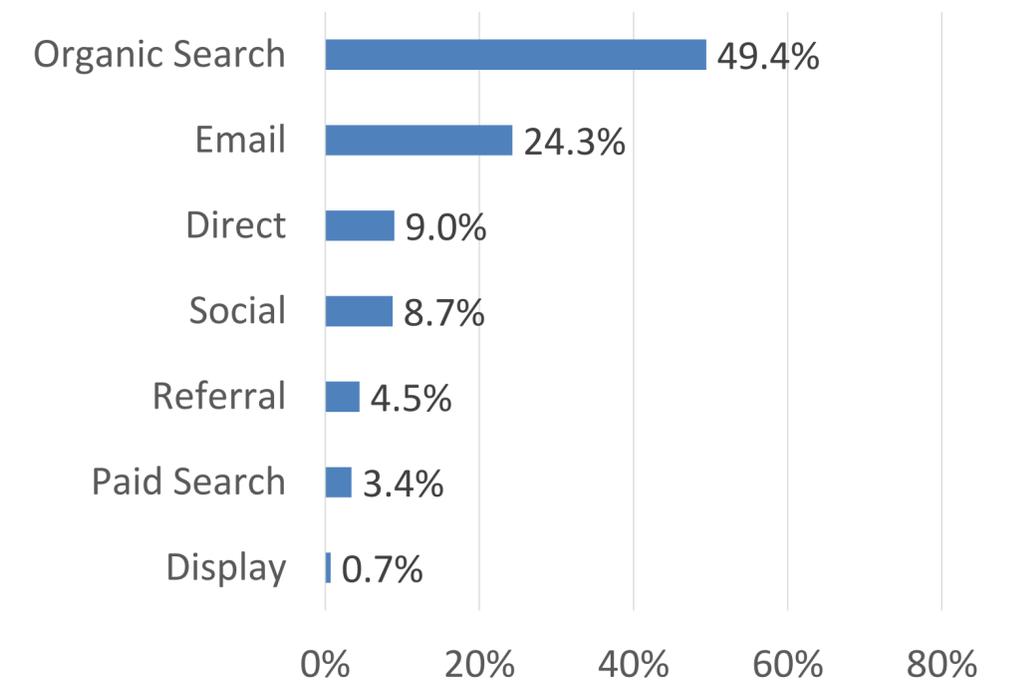
MILLENNIALS SITE ACQUISITION



GEN X SITE ACQUISITION



BABY BOOMERS SITE ACQUISITION



Generations—Engagement

While the top pages of engagement across generations were similar, there were a few differences noted. Millennials engaged with the Mt. Hood Hiker’s Bucket List page and Baby Boomers engaged with the Grand Tour of Willamette Valley’s Small Towns page. Baby Boomers and Gen Xers were more engaged with the Travel Guides page compared to Millennials. However, Millennials and Gen Xers were more likely to be engaged with the Soak in Oregon’s Magical Hot Springs compared to Baby Boomers. All three generations engaged with the Only Slightly Exaggerated, Top 10 Don’t-Miss Spots on the Oregon Coast and Before Visiting Multnomah Falls pages.

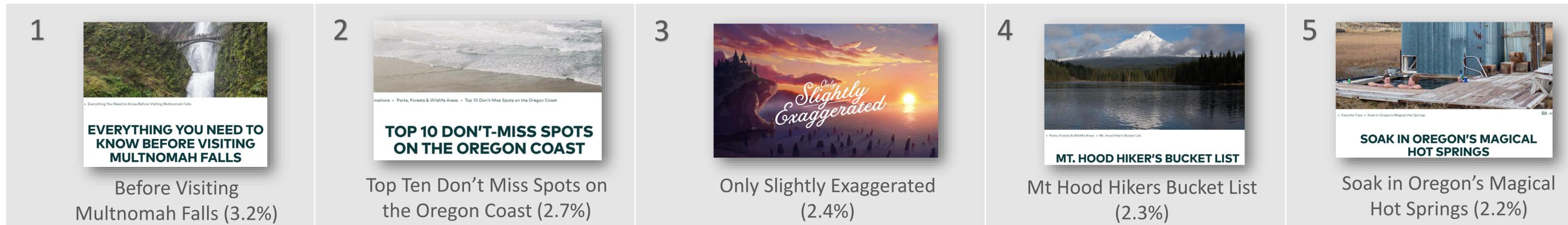
See the next page for top pages of engagement for each generation.

TOP PAGES OF ENGAGEMENT



Generations—Engagement (Continued)

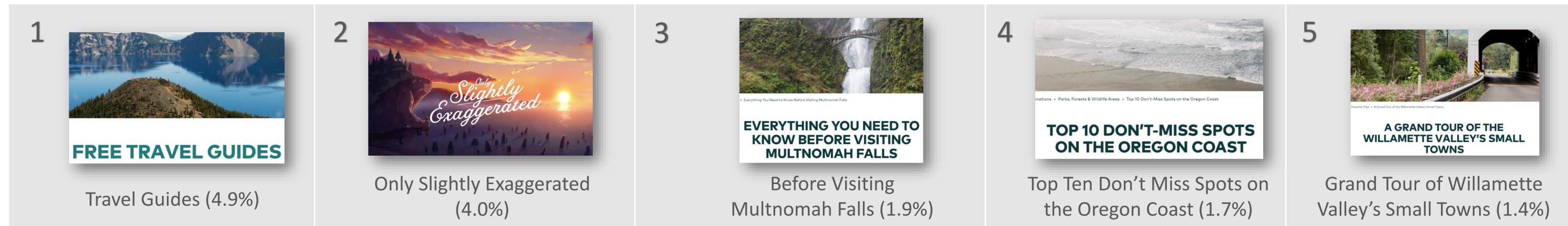
MILLENNIALS TOP PAGES OF ENGAGEMENT



GEN X TOP PAGES OF ENGAGEMENT



BABY BOOMERS TOP PAGES OF ENGAGEMENT



WEBSITE ANALYTICS: COMPARISON OF TRAVELOREGON.COM TO STATE TOURISM OFFICE WEBSITES

Website Analytics: Comparison to Average State Tourism Office Websites

The following pages present website user data from TravelOregon.com's website analytics compared to the average for the State Tourism Office websites. Website usage for TravelOregon.com and average for these state websites was compared by:

- **Potential visitors** - website users who were gathering trip information when they accessed the website.
- **Travel Planning Stage** - potential visitors who either had already made the decision to visit the destination, interested in visiting the destination or simply considering destinations when they accessed the website.
- **Objective for Using Website** - potential visitors who either were on the website searching for inspiration, gathering information or planning a trip itinerary.
- **Generation** - potential visitors who were either Millennials, Gen Xers or Baby Boomers.



Above: Image of Bagby Hot Springs from @TravelOregon on Instagram.

Potential Visitors Comparison—Residence and Website Use

Website usage on TravelOregon.com differed slightly compared to average state tourism website users. The information below shows the residence, average number of page views, average session duration and the percentage of new users on TravelOregon.com compared to the average for the State Tourism Office websites.

In comparison:

- TravelOregon.com attracted nearly the same amount of domestic residents compared to the average for all state website users.
- TravelOregon.com users viewed fewer pages (3.7) and spent less time (7:33 minutes) compared to the average state website user.

POTENTIAL VISITORS	TravelOregon.com	Average STO Website
Percent of U.S. Residents	90.4%	90.3%
Percent of International Residents	9.6%	9.7%
Average Number of Pages	3.7	4.6
Average Session Duration	7:33 minutes	8:57 minutes
Percent of New Users	93.3%	92.7%

Travel Planning Stage Comparison—Website Use

TravelOregon.com users who have already decided to visit Oregon were slightly more likely to be new visitors to the site compared to the average state website user. The information to the right 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 TravelOregon.com compared to the average for State Tourism Office websites.

In comparison:

- TravelOregon.com users across all travel planning stages viewed fewer pages and spent slightly less time on the website compared to average state website users.
- However, website users in the decided phase were slightly more likely to be first-time users of TravelOregon.com (93.3%) compared to the average state website.

DECIDED	TravelOregon.com	Average STO Website
Average Number of Pages	4.1 pages	4.9 pages
Average Session Duration	8:11 minutes	9:44 minutes
Percent of New Users	93.3%	91.4%

INTERESTED	TravelOregon.com	Average STO Website
Average Number of Pages	4.2 pages	4.5 pages
Average Session Duration	7:57 minutes	8:40 minutes
Percent of New Users	94.0%	94.8%

CONSIDERING	TravelOregon.com	Average STO Website
Average Number of Pages	3.3 pages	4.2 pages
Average Session Duration	6:32 minutes	8:06 minutes
Percent of New Users	92.7%	94.4%

Travel Planning Stage Comparison—Site Acquisition

Site acquisition by travel planning stage differed between TravelOregon.com and average state website users. The information to the right shows the primary sources of site acquisition for potential visitors on TravelOregon.com compared to the average for State Tourism Office websites.

In comparison:

- Organic search was the top method of arrival for TravelOregon.com website users across all travel planning stages and highest for those who had already decided to visit the state (68.5%) and those interested in visiting Oregon (65.3%). Organic search was lower for TravelOregon.com users who were considering destinations (56.0%) compared to the average state website user who was considering destinations (62.6%)
- TravelOregon.com website users who were most likely to be influenced by the website to take a trip (those in the interested and considering phases) were more apt to arrive through email (14.0% and 18.1%, respectively) and social media (6.5% and 9.8%) compared to the average state website user.

DECIDED	TravelOregon.com	Average STO Website
Direct	8.0%	11.4%
Display	0.5%	0.3%
Email	10.8%	5.8%
Organic Search	68.5%	62.5%
Paid Search	4.4%	12.8%
Referral	3.4%	5.2%
Social	4.3%	1.9%
INTERESTED		
Direct	6.2%	9.1%
Display	0.7%	0.4%
Email	14.0%	6.8%
Organic Search	65.3%	61.2%
Paid Search	3.9%	15.6%
Referral	3.4%	3.8%
Social	6.5%	3.1%
CONSIDERING		
Direct	7.5%	9.0%
Display	0.8%	0.4%
Email	18.1%	7.6%
Organic Search	56.0%	62.6%
Paid Search	4.1%	11.2%
Referral	3.8%	6.0%
Social	9.8%	3.1%

Travel Planning Stage Comparison—Top Pageview Types

TravelOregon.com website users in each planning stage were more likely to view pages related to Things to Do/Attractions, Regions/Cities and Articles/Stories/Blogs compared to average state website users. The information to the right shows the top pageview types of potential visitors on TravelOregon.com compared to the average for State Tourism Office websites.

In comparison:

- TravelOregon.com website users who were most likely to be influenced by the website to take a trip (those in the interested and considering stages) were more likely to view Articles/Stories/Blogs (at 16.9% and 19.6%, respectively) compared to the average state website use.
- TravelOregon.com website users considering destinations were most likely to view the Things to Do/Attractions pages (41.4%) compared to the average state website user.
- In contrast, average state website users were more likely to view the Travel Guide/Email Newsletter, Places to Stay and Events pages compared to TravelOregon.com across all planning stages.

DECIDED	TravelOregon.com	Average STO Website
Articles/Stories/Blogs	16.4%	12.5%
Events	2.0%	4.7%
Maps	1.6%	1.8%
Places to Stay	3.5%	6.3%
Regions/Cities	20.9%	17.1%
Things to Do/Attractions	38.7%	35.6%
Travel Guide/Email Newsletter	9.4%	14.9%
INTERESTED		
Articles/Stories/Blogs	16.9%	12.9%
Events	1.9%	4.1%
Maps	2.0%	1.6%
Places to Stay	5.6%	8.9%
Regions/Cities	20.8%	14.0%
Things to Do/Attractions	37.9%	35.2%
Travel Guide/Email Newsletter	10.7%	17.1%
CONSIDERING		
Articles/Stories/Blogs	19.6%	14.5%
Events	3.5%	6.0%
Maps	1.7%	1.6%
Places to Stay	4.1%	8.1%
Regions/Cities	17.9%	14.3%
Things to Do/Attractions	41.4%	36.5%
Travel Guide/Email Newsletter	6.0%	12.9%

Objective for Using Website Comparison—Website Use

TravelOregon.com website usage differed by objective compared to average state website users. The information to the right shows the average number of page views, average session duration and percent of new users for potential travelers either searching for inspiration, gathering information or planning a trip itinerary on TravelOregon.com compared to the average for State Tourism Office websites.

In comparison:

- TravelOregon.com users across all segments viewed fewer pages and spent less time on the website compared to average state website users.
- However, website users gathering information were slightly more likely to be first-time users of TravelOregon.com (93.3%) compared to the average state website.

SEARCHING FOR INSPIRATION	TravelOregon.com	Average STO Website
Average Number of Pages	4.2 pages	5.1 pages
Average Session Duration	8:50 minutes	9:53 minutes
Percent of New Users	91.8%	92.3%

GATHERING INFORMATION		
Average Number of Pages	3.9 pages	5.0 pages
Average Session Duration	8:14 minutes	9:53 minutes
Percent of New Users	93.3%	91.9%

PLANNING TRIP ITINERARY		
Average Number of Pages	3.6 pages	4.7 pages
Average Session Duration	8:35 minutes	10:05 minutes
Percent of New Users	91.2%	92.6%

Objective for Using Website Comparison—Site Acquisition

TravelOregon.com site users with a specific objective for visiting the website were more likely to arrive through email and social media compared to the average state website user. The information to the right shows the primary sources of site acquisition for potential travelers either searching for inspiration, gathering information or planning a trip itinerary on TravelOregon.com compared to the average for State Tourism Office websites.

In comparison:

- Organic search was the top method of arrival for TravelOregon.com users with gathering information on the website being the top objective for visiting the website (67.8%). Additionally, organic search across all segments was slightly higher compared to the average for state website users.
- TravelOregon.com website users planning a trip itinerary were more likely to arrive through email (19.1%) and social media (8.4%) compared to the average state website user.
- In contrast, average state website users were more likely to arrive via paid search, directly and through referral compared to TravelOregon.com across all objective segments.

SEARCHING FOR INSPIRATION	TravelOregon.com	Average STO Website
Direct	8.5%	11.4%
Display	0.7%	0.3%
Email	17.1%	7.8%
Organic Search	59.3%	61.5%
Paid Search	3.1%	10.3%
Referral	3.2%	5.4%
Social	8.1%	4.0%

GATHERING INFORMATION

Direct	7.4%	10.0%
Display	0.4%	0.3%
Email	12.4%	7.0%
Organic Search	67.8%	65.1%
Paid Search	3.4%	10.7%
Referral	3.9%	4.4%
Social	4.7%	2.7%

PLANNING TRIP ITINERARY

Direct	7.3%	10.3%
Display	0.9%	0.4%
Email	19.1%	8.7%
Organic Search	55.3%	59.8%
Paid Search	4.4%	12.4%
Referral	4.6%	5.1%
Social	8.4%	3.5%

Objective for Using Website Comparison—Top Pageview Types

Similar to other potential traveler segments evaluated, the Things to Do/Attractions, Regions/Cities and Articles/Stories/Blogs pages were viewed more often by TravelOregon.com users accessing the site for a specific objective compared to the average state website user. The information to the right shows the top pageview types of potential travelers either searching for inspiration, gathering information or planning a trip itinerary on TravelOregon.com compared to the average for State Tourism Office websites.

In comparison:

- TravelOregon.com users searching for inspiration were more likely to view the Articles/Stories/Blogs page compared to the average state website user (19.6% vs. 14.2%), while TravelOregon.com users gathering information were more inclined to view Things to Do/Attractions pages compared to the average state website user (40.0% vs. 36.2%).
- Additionally, TravelOregon.com users planning a trip itinerary were more apt to view the Regions/Cities page compared to average state website users (22.8% vs. 14.5%).

SEARCHING FOR INSPIRATION	TravelOregon.com	Average STO Website
Articles/Stories/Blogs	19.6%	14.2%
Events	2.7%	5.9%
Maps	1.5%	1.6%
Places to Stay	4.4%	7.0%
Regions/Cities	19.0%	15.2%
Things to Do/Attractions	38.2%	35.6%
Travel Guide/Email Newsletter	7.5%	15.0%
GATHERING INFORMATION		
Articles/Stories/Blogs	15.3%	12.7%
Events	2.3%	5.1%
Maps	1.9%	1.8%
Places to Stay	3.7%	7.4%
Regions/Cities	20.0%	16.3%
Things to Do/Attractions	40.0%	36.2%
Travel Guide/Email Newsletter	8.8%	14.2%
PLANNING TRIP ITINERARY		
Articles/Stories/Blogs	15.8%	14.1%
Events	1.6%	4.6%
Maps	2.4%	1.6%
Places to Stay	5.1%	9.7%
Regions/Cities	22.8%	14.5%
Things to Do/Attractions	34.6%	33.4%
Travel Guide/Email Newsletter	12.9%	15.8%

Generation Comparison—Website Use

On average, website use varied by generation on TravelOregon.com compared to average state websites. The information to the right 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 TravelOregon.com compared to the average for State Tourism Office websites.

In comparison:

- TravelOregon.com users across all generational segments viewed fewer pages and spent less time on the website compared to average state website users.
- Meanwhile, Gen X website users gathering information were slightly more likely to be first-time users of TravelOregon.com (93.6%) compared to the average state website.

MILLENNIALS	TravelOregon.com	Average STO Website
Average Number of Pages	4.2 pages	4.4 pages
Average Session Duration	6:51 minutes	7:53 minutes
Percent of New Users	92.3%	93.8%

GEN X	TravelOregon.com	Average STO Website
Average Number of Pages	3.5 pages	4.7 pages
Average Session Duration	7:10 minutes	8:58 minutes
Percent of New Users	93.6%	92.0%

BABY BOOMERS	TravelOregon.com	Average STO Website
Average Number of Pages	3.3 pages	4.2 pages
Average Session Duration	7:21 minutes	8:50 minutes
Percent of New Users	91.6%	91.9%

Generation Comparison—Site Acquisition

Site acquisition through organic search was higher for TravelOregon.com for Millennials and Gen Xers compared to those same generational segments for average state website users. The information to the right shows the primary sources of site acquisition for Millennials, Gen Xers and Baby Boomers gathering trip information on TravelOregon.com website compared to the average for State Tourism Office websites.

In comparison:

- Organic search was the top method of arrival for TravelOregon.com Millennial users (70.3%) compared to the average state website (64.2%).
- TravelOregon.com users across all generations were more likely to arrive to the site via email and social media compared to average state website users.
- TravelOregon.com Baby Boomer users were considerably more likely to arrive to the site through email compared to average state website users (34.3% vs. 7.4%).

MILLENNIALS	TravelOregon.com	Average STO Website
Direct	9.1%	9.3%
Display	1.7%	0.2%
Email	4.1%	1.0%
Organic Search	70.3%	64.2%
Paid Search	3.2%	4.9%
Referral	3.5%	4.4%
Social	8.1%	1.5%
GEN X		
Direct	8.4%	8.7%
Display	1.1%	0.3%
Email	9.0%	3.0%
Organic Search	61.6%	57.6%
Paid Search	3.7%	7.6%
Referral	3.5%	5.0%
Social	12.8%	3.6%
BABY BOOMERS		
Direct	9.0%	10.0%
Display	0.7%	0.3%
Email	24.3%	7.4%
Organic Search	49.4%	50.8%
Paid Search	3.4%	7.9%
Referral	4.5%	6.2%
Social	8.7%	3.0%

Generation Comparison—Top Pageview Types

TravelOregon.com website usage across generations varied compared to average state website usage. The information to the right shows the top types of pages Millennials, Gen Xers and Baby Boomers accessed on TravelOregon.com compared to the average for State Tourism Office websites.

In comparison:

- Across all generations, TravelOregon.com users viewed the Things to Do/Attractions, Regions/Cities and Articles/Stories/Blogs pages more often than the average state website user.
- TravelOregon.com Baby Boomers and Gen X users were more likely to view the Articles/Stories/Blogs page (17.5% and 17.3%, respectively) compared to the average state website users, while TravelOregon.com Millennial users were more inclined to view Things to Do/Attractions pages compared to the average state website user (44.9% vs. 41.1%).

MILLENNIALS	TravelOregon.com	Average STO Website
Articles/Stories/Blogs	14.8%	13.7%
Events	3.9%	7.0%
Maps	1.8%	1.2%
Places to Stay	3.7%	6.6%
Regions/Cities	18.5%	14.9%
Things to Do/Attractions	44.9%	41.1%
Travel Guide/Email Newsletter	3.5%	8.6%
GEN X		
Articles/Stories/Blogs	17.3%	13.3%
Events	3.0%	6.8%
Maps	1.4%	1.5%
Places to Stay	3.2%	7.2%
Regions/Cities	18.9%	15.6%
Things to Do/Attractions	41.6%	36.4%
Travel Guide/Email Newsletter	6.8%	12.5%
BABY BOOMERS		
Articles/Stories/Blogs	17.5%	14.2%
Events	2.9%	5.9%
Maps	2.2%	1.8%
Places to Stay	3.4%	6.7%
Regions/Cities	19.6%	15.6%
Things to Do/Attractions	37.4%	32.4%
Travel Guide/Email Newsletter	10.0%	15.3%