

EXECUTIVE SUMMARY
TEXAS A&M/MISSOURI DIVISION OF TOURISM WEB STUDY
PHASE 2--Year End Report for FY 2008
(Data collected July 1, 2007 - June 30, 2008)

METHODOLOGY:

- Phase 1 of this research is tabulated quarterly by Texas A&M. It was conducted on the participating states' website via pop-up surveys and/or links on main site pages. (For Missouri it is both avenues.)
- Phase 2 consisted of re-contacting those that agreed to a second contact from Phase 1. It is a study of FY08 conducted on website visitors who both did and did not ultimately visit Missouri.
- This is the first year that Texas A&M has released a fiscal year end report; previously, the reports have been done on a calendar year basis. Because there is no previous fiscal year report to compare results with, we have used the last full calendar year report as a basis for comparison.
- Answers are categorized by those who visited Missouri and those who did not visit Missouri last year (visitors/nonvisitors).
- There are now six states involved in this study. They are: Arizona, Iowa, Missouri, Nevada, South Carolina, and Texas..
- Missouri specific sample size: 382 Missouri specific interviews resulting in a +/- 6.3% margin of error.
- The follow-up study (Phase 2) is when most of the evaluation emphasis is on the website itself. The major research objectives of Phase 2 are to discover indicators with regard to :
 - Determining the effectiveness of each state's web site for both visitors and nonvisitors,
 - Determining website influence as related to visitor travel preferences
 - Evaluating visitors satisfaction as related to each state's web site
 - Discovering feelings toward each state as a vacation destination
 - Discovering opportunities to improve the state tourism web sites

MISSOURI SPECIFIC FINDINGS

(For each area below, answers are grouped by visitors and nonvisitors)

Fiscal Year 2007	Fiscal Year 2008
▪ <i>Affect of website on decision to travel to Missouri & where in Missouri to travel:</i>	▪ <i>Affect of website on decision to travel to Missouri & where in Missouri to travel:</i>
– Visitor: Extremely persuading 16.6%; Somewhat persuading 43.2%; Neutral 39.5%	– Visitor: Extremely persuading 17.5%; Somewhat persuading 39.9%; neutral 42.3%
– Nonvisitor: Extremely persuading 22.8%; Somewhat persuading 38.3%; Neutral 37%	– Nonvisitor: Extremely persuading 18.2%; Somewhat persuading 43.9%; Neutral 37.9%
– Influencers on visit to MO? Previous Visits-41.6%; Friends & Family-37.8%; Convenience-25.9%; Cost-14.9%; Climate-14.3%; Articles in Travel Magazines or newspaper-13.6%; Advertising-8%; Television-2.5%	– Influencers on visit to MO? Previous Visits-43%; Convenience-39.8%; Friends & Family-34.8%; Cost-28.3%; Magazine articles-16%; Advertising-12.3% Word of Mouth-10.7%; Climate-9%; Television-2%
– Visitors: Discovered <u>new ideas</u> about a trip: 31.7%; Useful info about trip already planned: 35.2%	– Visitors: Discovered <u>new ideas</u> about a trip: 28%; Useful info about trip already planned: 40.3%
– No influence on where went in the state: 33.1%	– No influence on where went in the state: 31.7%
▪ <i>Website influence as related to visitor travel preferences:</i>	▪ <i>Website influence as related to visitor travel preferences:</i>
– Visitors found this <u>information most valuable</u> : Attractions: 30%; nightlife: 14%; Outdoor/Nature Activities: 13.6%; and Maps & Transportation: 13.1%	– Visitors found this <u>information most valuable</u> : Attractions: 35.1%; Outdoor/Nature Activities: 14.6%; nightlife: 13%; and Maps & Transportation: 12.6%
– Affect of website on lengthening visitors' stay in Missouri: 27.5% of those surveyed who visited MO said that the website did show them activities/events that encouraged them to lengthen their stay in Missouri. 37.1% of those stayed 1 day longer; another	– Affect of website on lengthening visitors' stay in Missouri: 29.5% of those surveyed who visited MO said that the website did show them activities/events that encouraged them to lengthen their stay in Missouri. 33.3% of those stayed 1 day longer; another

31.4% stayed 2 days longer. The remaining 31.4% stayed 3 or more days longer.	37.7% stayed 2 days longer. The remaining 29% stayed 3 or more days longer.
<p>▪ Nonvisitors: why they didn't visit Missouri & feelings toward state as a vacation destination:</p> <ul style="list-style-type: none"> – 48.1% who did not choose to vacation in Missouri after visiting our web site said they will visit in the future; 21.3% said it was because they did not have enough time. 5.1% wanted to go someplace they hadn't visited before; 4.8% said they were unable to get information. – Nonvisitor feelings toward Missouri as a destination: Destination extremely or somewhat desirable 84.4%; Neutral 14.6% – <u>Probability they will visit</u> in the next two years? 71.6% said they were between high probability and 100% sure. 21% were unsure they would visit in next two years. 6.5% said there was a low probability of visiting within 2 years. 	<p>▪ Nonvisitors: why they didn't visit Missouri & feelings toward state as a vacation destination:</p> <ul style="list-style-type: none"> – 51.4% who did not choose to vacation in Missouri after visiting our web site said they will visit in the future; 18.1% said it was because they did not have enough time. Main other comments: wanted to go someplace they hadn't visited before. – Nonvisitor feelings toward Missouri as a destination: Destination extremely or somewhat desirable 80.7%; Neutral 17% – <u>Probability they will visit</u> in the next two years? 68.9% said they were between high probability and 100% sure. 18.5% were unsure they would visit in next two years. 12.6% said there was a low probability of visiting within 2 years.
<p>▪ Customer Satisfaction with the site:</p> <ul style="list-style-type: none"> – When asked if the site accurately represented the part of the state that they ultimately visited, 19% said "Very well, I knew what to expect while 65% rated it "Good, let me know what to expect". 13.4% said the representation was "somewhat clear", and 2.2% said it was "unclear". Only 0.3% rated it "poorly" and felt the site did not match reality. 	<p>▪ Customer Satisfaction with the site:</p> <ul style="list-style-type: none"> – When asked if the site accurately represented the part of the state that they ultimately visited, 25.6% said "Very well, I knew what to expect while 59.2% rated it "Good, let me know what to expect". 11.3% said the representation was "somewhat clear", and 3.4% said it was "unclear". Only 0.4% rated it "poorly" and felt the site did not match reality.
<p>▪ Additional information would like to see on the site:</p> <ul style="list-style-type: none"> – More <u>local events</u>: Visitors: 43.1%; Nonvisitors: 37.6% – More <u>historical attraction information</u>: Visitors: 38.1%; Nonvisitors: 37.3% – More <u>attractions</u>: Visitors: 32.3%; Nonvisitors: 29.9% – More <u>Outdoor/Nature Activities information</u>: Visitors: 30.8%; Nonvisitors: 28.3% – More <u>travel packages</u>: Visitors: 28%; Nonvisitors: 28.3% – More <u>transportation information</u>: Visitors: 26.5%; Nonvisitors: 27.7% – More <u>restaurant information</u>: Visitors: 25.4%; Nonvisitors: 22.3% – More <u>accommodations information</u>: Visitors: 21.9%; Nonvisitors: 26.8% – More <u>information on Cultural Attractions</u> : Visitors: 15.6%; Nonvisitors: 16.6% – More <u>information about Weather</u>: Visitors: 13.8%; Nonvisitors: 8.3% – More <u>Travel Itineraries</u>: Visitors: 10.4%; Nonvisitors: 11.8% 	<p>▪ Additional information would like to see on the site:</p> <ul style="list-style-type: none"> – More <u>local events</u>: Visitors: 43.4%; Nonvisitors: 31.9% – More <u>historical attraction information</u>: Visitors: 39.3%; Nonvisitors: 26.8% – More <u>attractions</u>: Visitors: 30.3%; Nonvisitors: 24.6% – More <u>transportation information</u>: Visitors: 29.1%; Nonvisitors: 24.6% – More <u>travel packages</u>: Visitors: 24.6%; Nonvisitors: 22.5% – More <u>Outdoor/Nature Activities information</u>: Visitors: 31.1%; Nonvisitors: 26.8% – More <u>accommodations information</u>: Visitors: 24.6%; Nonvisitors: 22.5% – More <u>restaurant information</u>: Visitors: 19.7%; Nonvisitors: 21.7% – More <u>information on Cultural Attractions</u> : Visitors: 17.2%; Nonvisitors: 15.2% – More <u>information about Weather</u>: Visitors: 14.3%; Nonvisitors: 11.6% – More <u>Travel Itineraries</u>: Visitors: 9.4%; Nonvisitors: 18.1%