

THE IMPACT OF DMO WEBSITES

DMO Website
User & Conversion Study

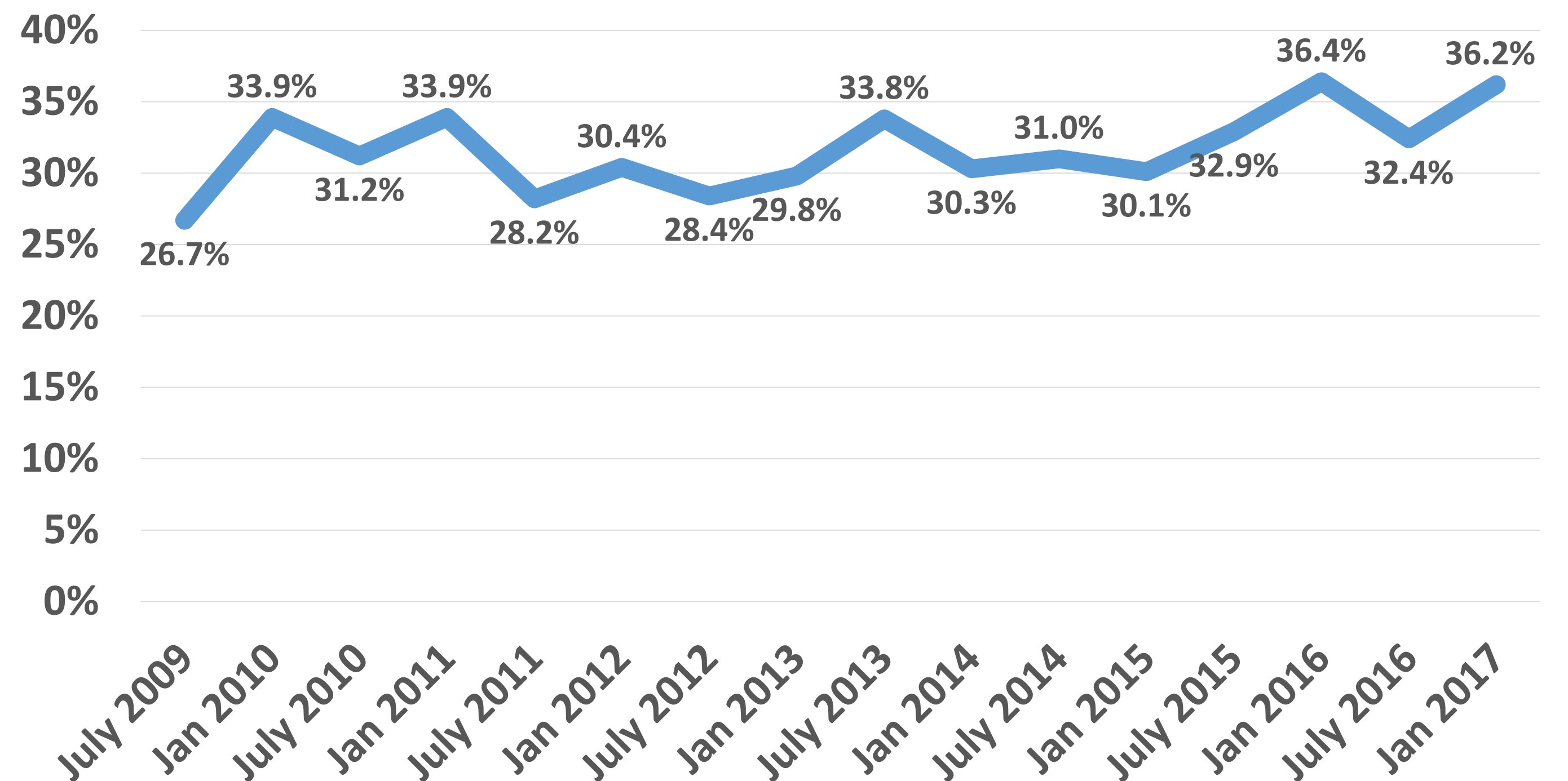
EXECUTIVE SUMMARY OF FINDINGS

BACKGROUND: TRAVELERS' RELATIONSHIP TO DMO WEBSITES

Background: Travelers' Use of DMO Websites—Historic Perspective

In a time in which travel-related content is ubiquitous across media and travelers are accessing more of it than ever, DMO websites remain an ever important resource throughout travelers' journeys— from the inspiration to take a trip to the essential details of their itineraries. In fact, in January 2017, well over one-third of American leisure travelers reported having used a DMO website in the past year to research and/or plan travel—a figure that is up nearly 10 percent from July 2009*.

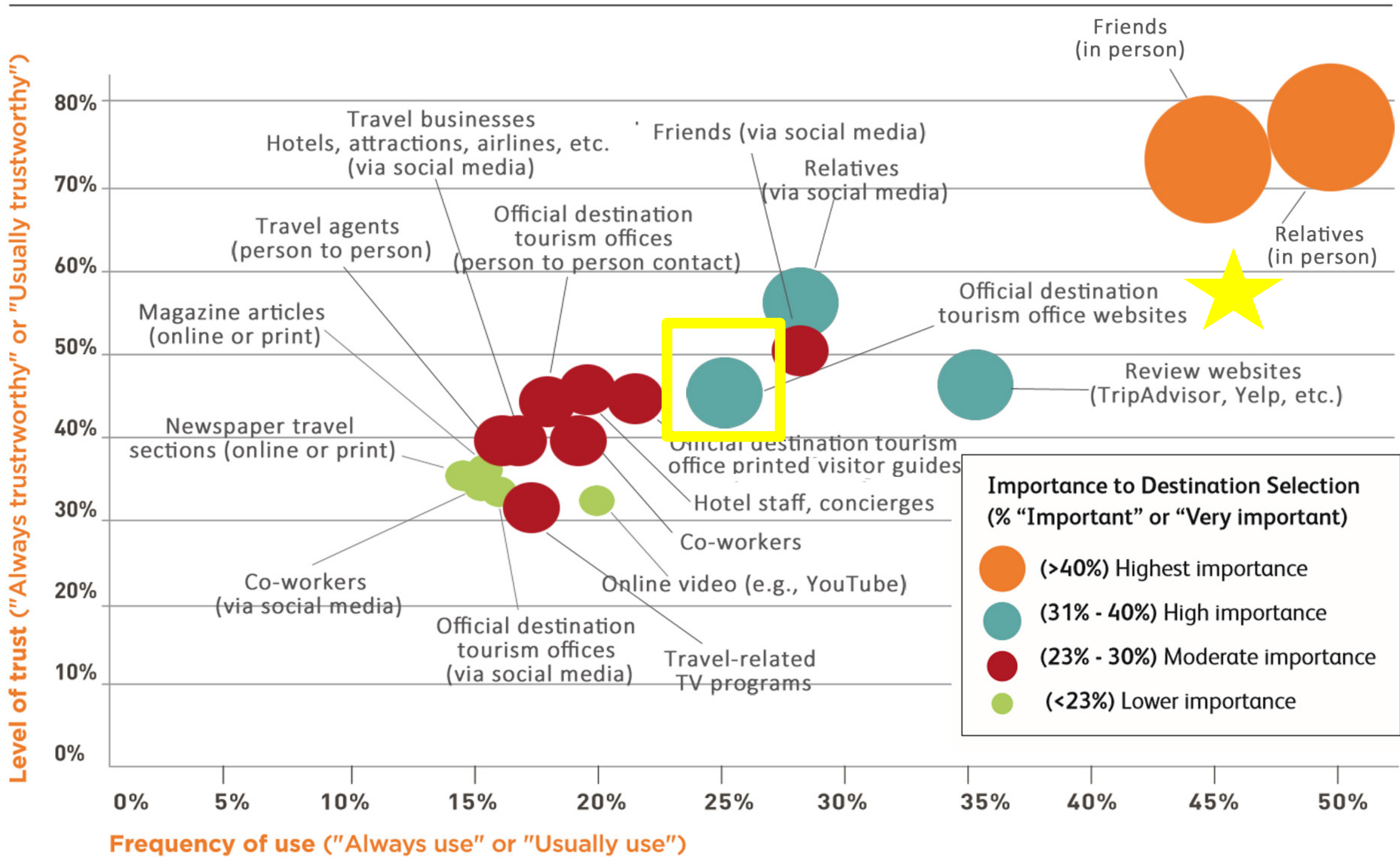
American Leisure Travelers' Use of DMO Websites—2009-2017



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

Background: Travelers' Use of DMO Websites

Trust Me, Use Me, Value Me
A visualization of the trust levels, usage rates and importance of the key resources used in travel research



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

*Source: Destination Analysts' [The State of the American Traveler™](#) --Technology Edition, April 2017. Base: 2,000 American leisure travelers.

Background—Users' Perceptions of DMO Websites

In addition to being a commonly used and trusted travel planning resource, DMO websites are seen by their users as “inspirational,” “valuable,” “well-organized,” and “authoritative” sources of information. The word cloud at right provides an illustrative summary of the words and phrases used to describe DMO websites in qualitative usability research.

Destination Analysts conducted on such sites between July 2016 and March 2017. Users of these sites focus on their comprehensiveness and expertise in relaying their value.



Source: Destination Analysts; Usability studies of 8 DMO websites, July 2016-March 2017.

DMO WEBSITE USER & CONVERSION STUDY: RESEARCH OVERVIEW & METHODOLOGY

Research Overview

In 2016, the DMA West Education & Research Foundation partnered with Destination Analysts to conduct a year-long User & Conversion Study on DMO websites. The Foundation's overarching goal for commissioning this study was to examine travelers who use DMO websites in order to develop a profile of these users, and to measure the extent that this marketing asset converts its users to actual visitors of the destination it promotes. All DMA West member DMOs were invited to participate in this cooperative research project. In total, thirteen (13) DMOs undertook this research.

While each participating DMO received a custom report on its own website user profile and ROI estimates, this document presents the aggregate findings from data collected from all thirteen (13) participating DMOs.

In addition to the support of the DMA West Education & Research Foundation, further insights about DMO website user behaviors through implementing an integration of survey data and site analytics was made possible by a generous sponsorship from Miles.

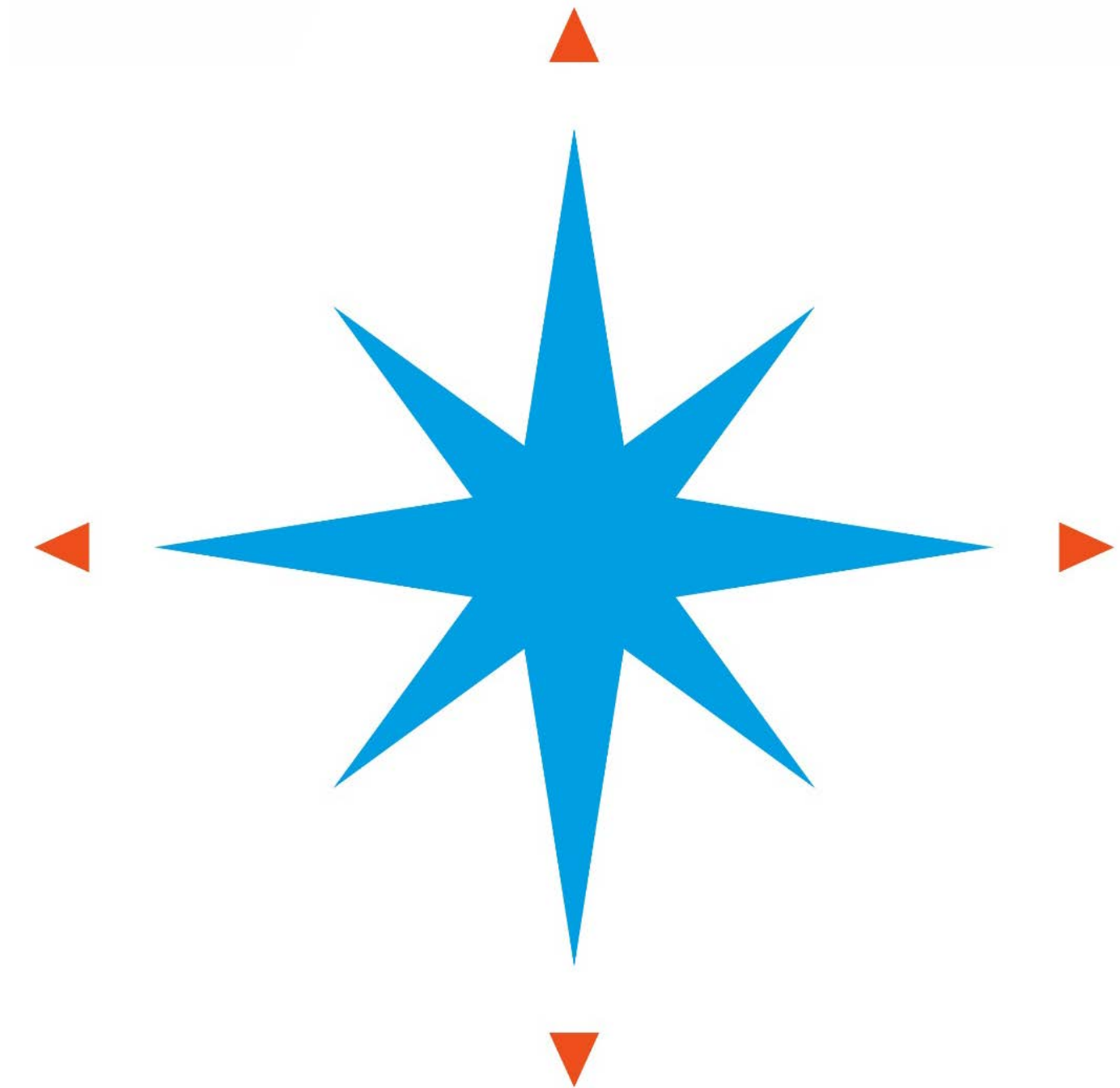


Above: Logos of participating DMA West member DMO's.

Research Objectives

This research was designed primarily to:

- **Determine the Visitor Spending Impact and ROI DMO Websites Produce for their Communities:** The research findings sought to estimate the total amount of direct visitor spending in-market that was generated by and attributable to the DMO website (i.e., the amount of visitor spending in the destination that would NOT have occurred in the absence of the website).
- **Develop Profiles of DMO Website Users:** The study collected demographic, psychographic, attitudinal and behavioral information about website users, as well as content sought on the sites, in order to provide a comprehensive look at the segments of travelers who use these sites and their motivations.
- **Use the Voice of the User to Produce More Comprehensive and In-Depth Performance Metrics for DMO Websites:** The research integrated and analyzed site analytics and survey data to provide further clarity into the segments of DMO site users and their site behaviors, in order to provide the DMO industry a more detailed understanding of what goals and benchmarks to establish and strive for in website marketing.

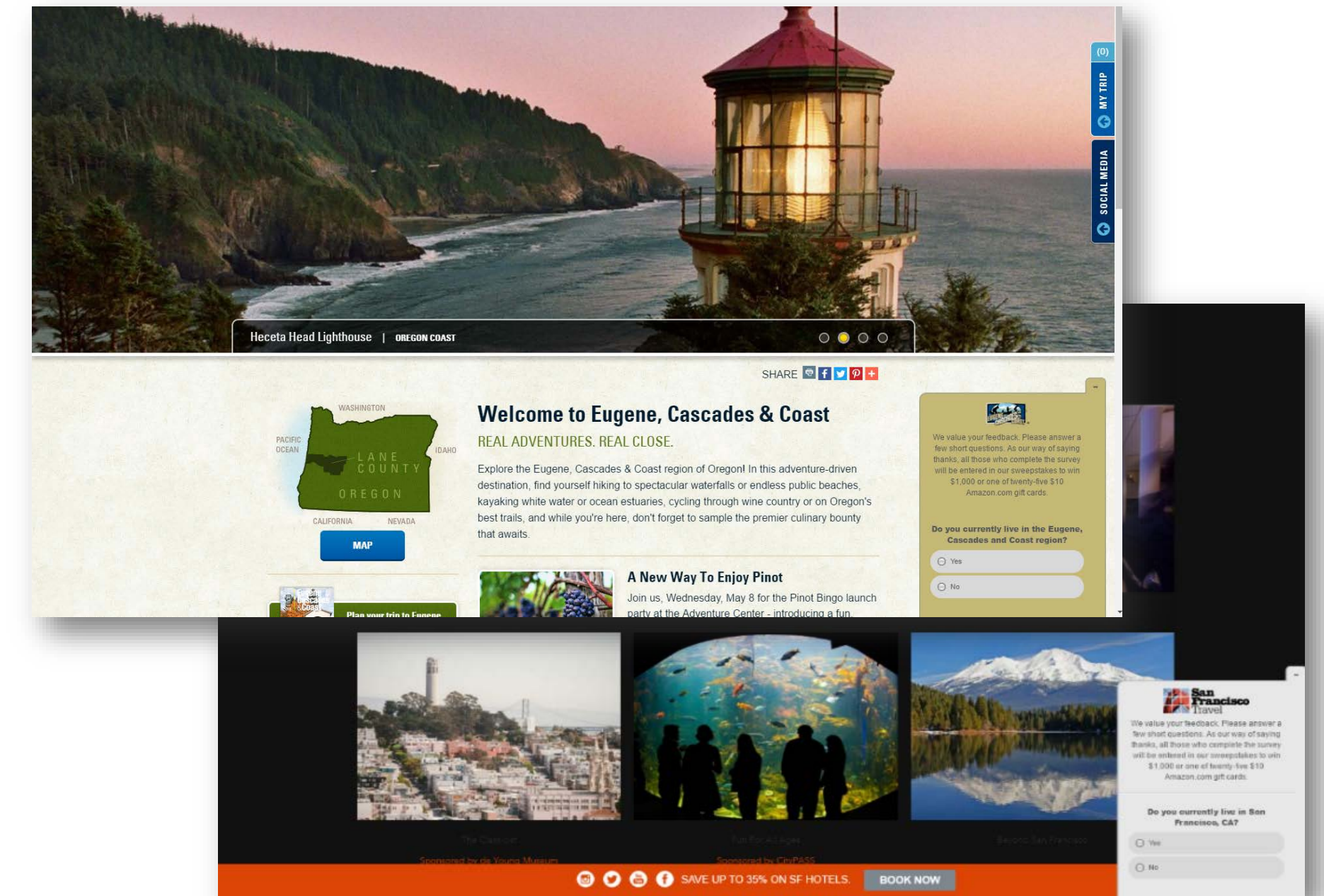


Methodology

This research employed a dual survey methodology to collect data from DMO website users: (1) a **Website User Intercept Survey** that was completed when a website user accessed the DMO website, and (2) a **Website User Follow-Up Survey** that was sent via email after the website user's intended date of travel. For each survey, a base questionnaire that addressed the study's core objectives was adopted for each participating DMO, and custom questions related to their destination or organization's informational needs were also included. Surveys were optimized for both mobile and desktop experiences. The two surveys are summarized below.

Website User Intercept Survey: Upon arriving at the DMO website, a survey appeared requesting site visitors to answer a few questions. The survey questionnaire included topics such as website users' motivations for visiting the site, destination decision process, their anticipated month of arrival to the destination, as well as permission to send a follow-up survey after their intended month of travel. In total, 379,966 completed surveys were collected in this effort between January 1, 2016 and January 1, 2017.

Website User Follow-Up Survey: Survey respondents to the initial Website User Intercept Survey were asked which month they expected to visit the destination. 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 their visitation to the destination and questions relevant to developing estimates of the website's return on investment. In total, 21,721 completed surveys were collected in this effort between January 1, 2016 and February 1, 2017.

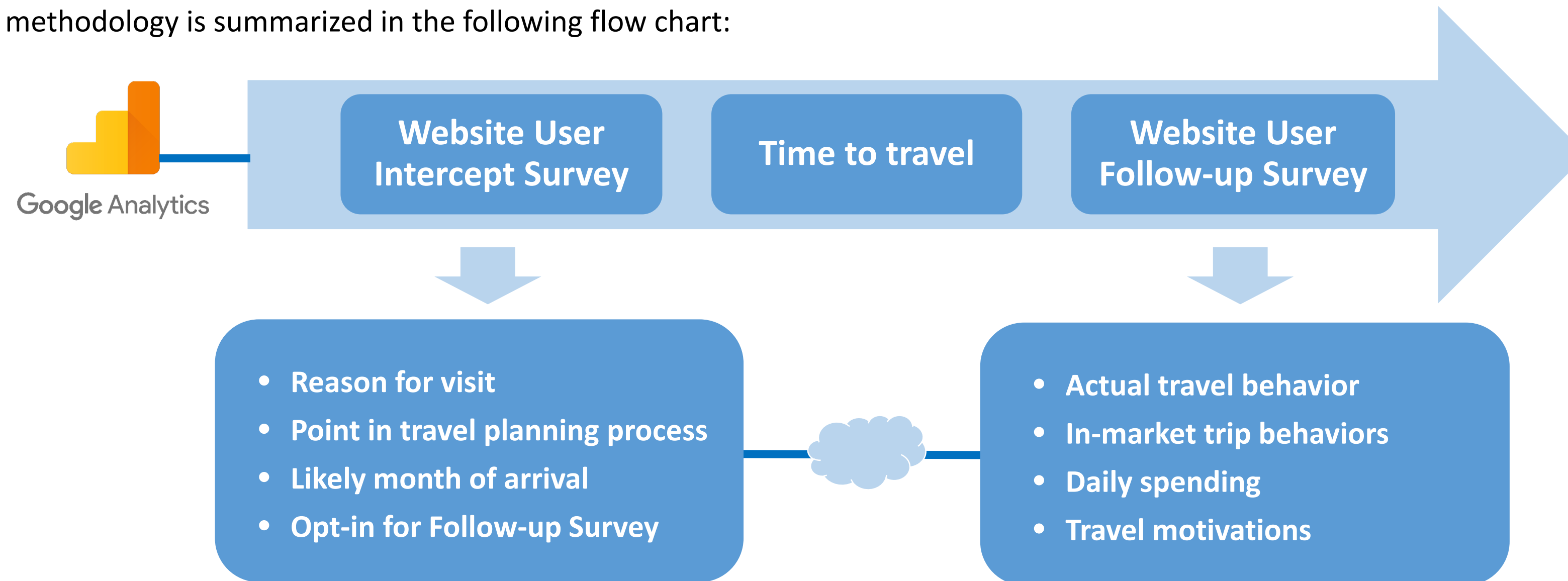


Above: Screenshots of the Website Intercept Survey on participating DMO website homepages.

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.

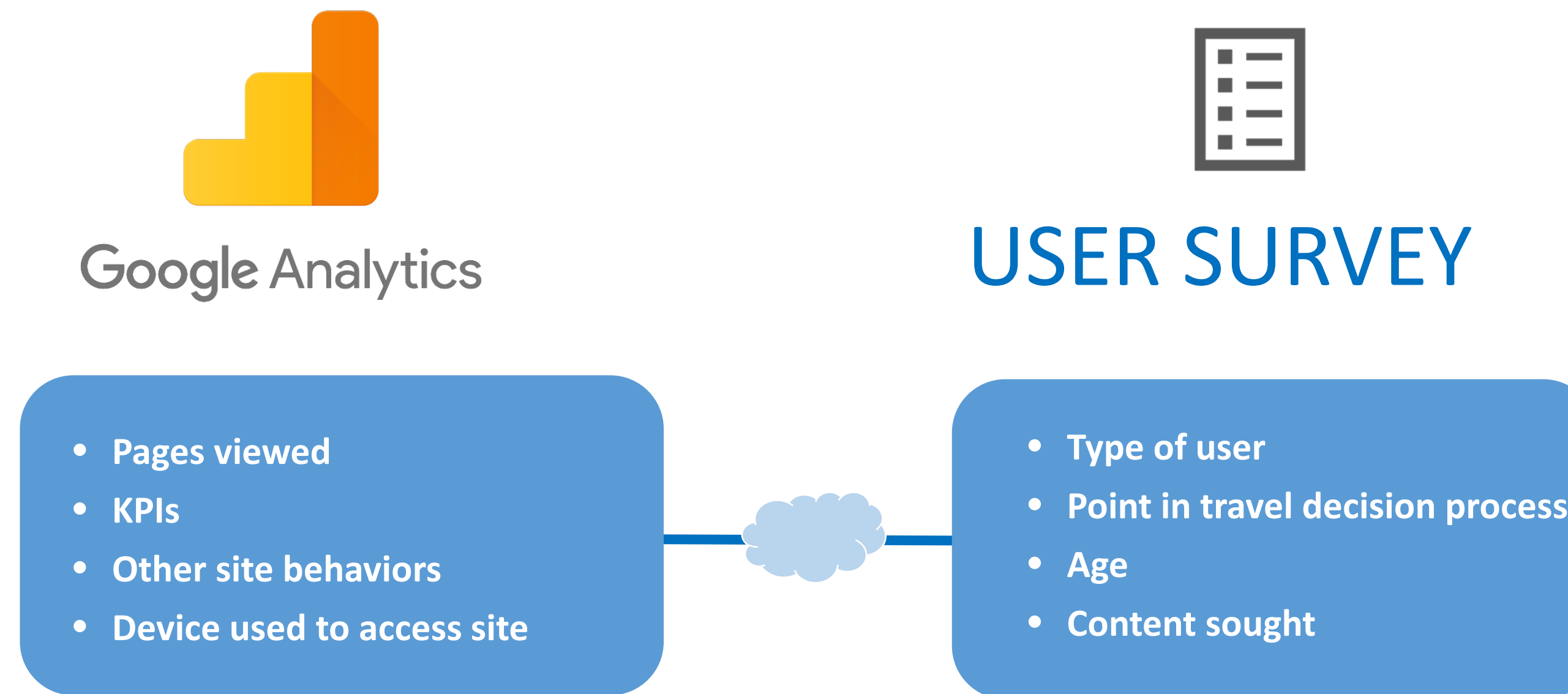
The study's overarching methodology is summarized in the following flow chart:



Data weighting: When examining combined data from multiple DMOs, it is important to note that different DMO websites experience different levels of user traffic. A DMO website for a large city may have more users than a DMO website for a smaller destination. Hence, adjustments to the raw data must be made. Data presented here that describes website users surveyed on all participating DMO websites is weighted to account for these different levels of user traffic. With this weighting plan, the data can be considered unbiased and can be accurately attributed to the overall population of DMO website users.

Methodology (continued)

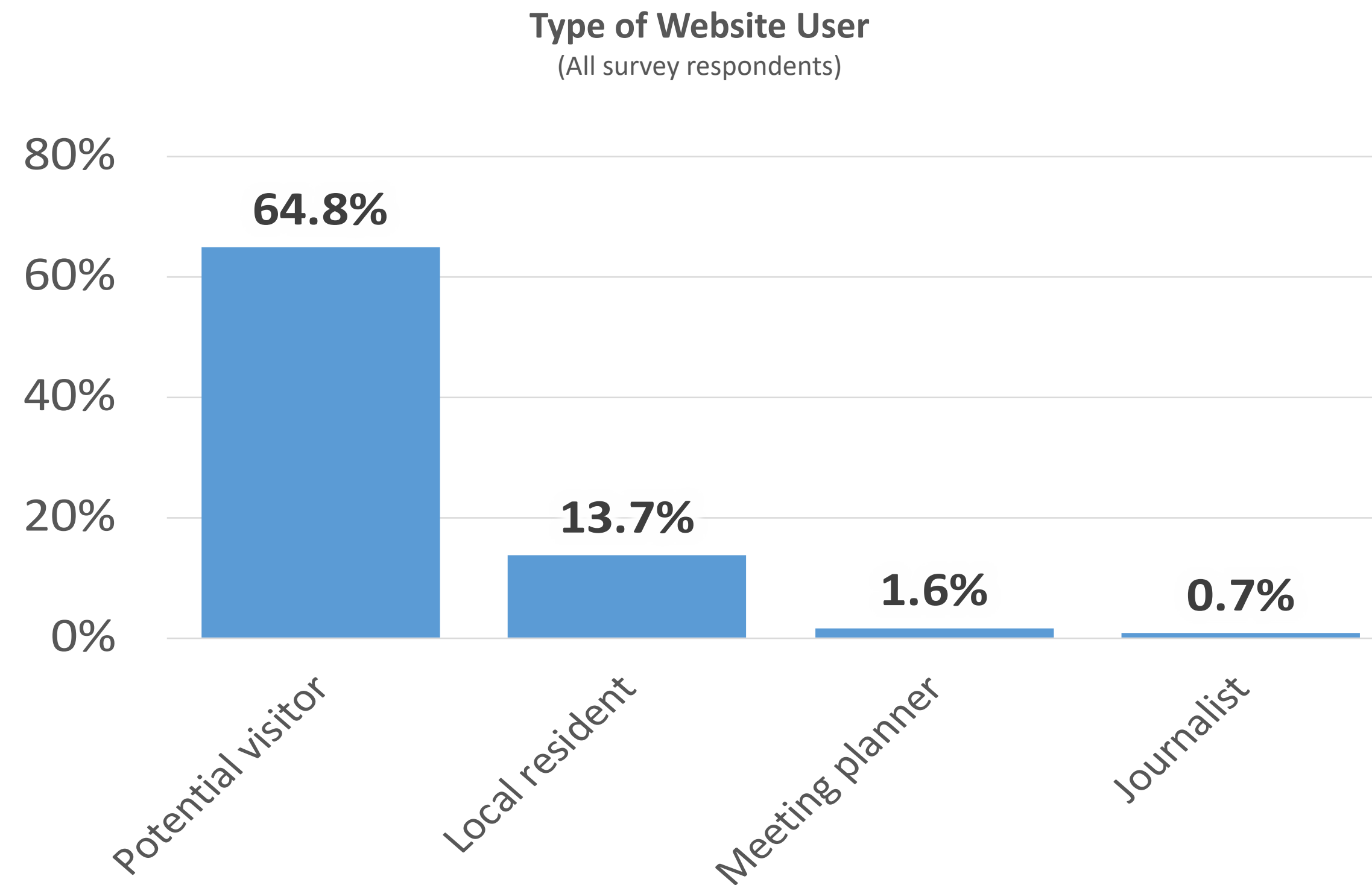
The Website User Intercept Survey on each of the participating DMOs' websites was integrated with the respective site's analytics. This allowed for an analysis of site behaviors and key site performance metrics by important user groups—including decided on destination vs. undecided, local vs. potential visitor, Millennial vs. Baby Boomer, and mobile user vs. desktop user—identified through survey responses. **Findings illuminate the often significant differences in site behaviors by DMO website user segments and thus how important it is for DMOs to have a deep and comprehensive view of their audience in tracking their website performance.**



WHO USES DMO WEBSITES

Types of DMO Website Users

While DMO websites attract and serve a diverse audience, nearly two-thirds of DMO website users reported being potential visitors gathering travel-related information about their respective destination (64.8%). One of the first questions asked in the Website User Intercept Survey identified the user's reason for visiting the website. The chart below shows the percentage of each type of website user surveyed on all participating DMO websites in the study.

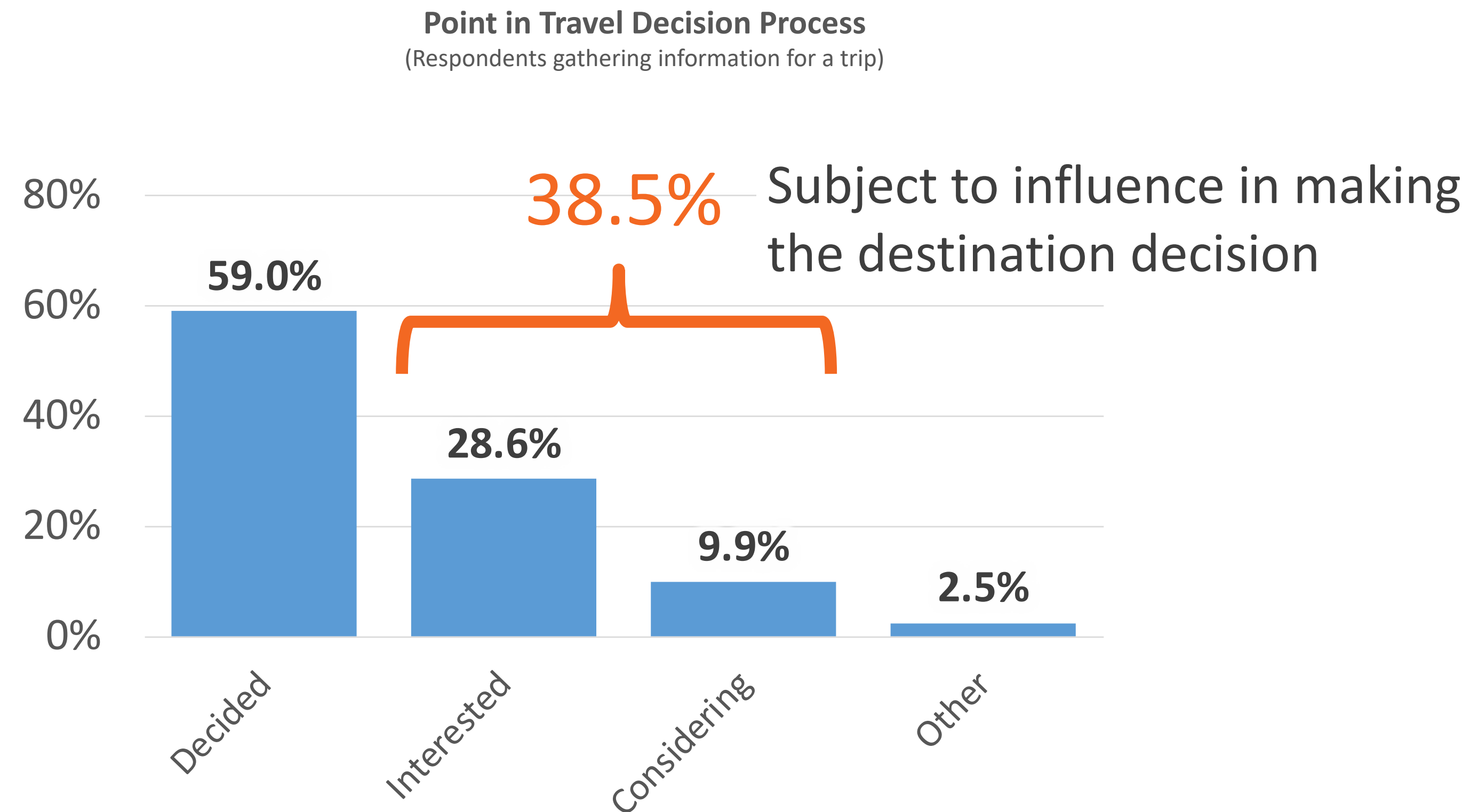


Question: Which of the following best describes you?

Base: All survey respondents. 379,966 completed surveys.

DMO Website Users—Point in Travel Decision Process

Nearly 40 percent of the DMO website user audience who represents potential visitors to the destination reported being at a point of influence in their destination decision when accessing these sites. The remainder of these users had already made up their mind to visit the destination when they used the DMO website.

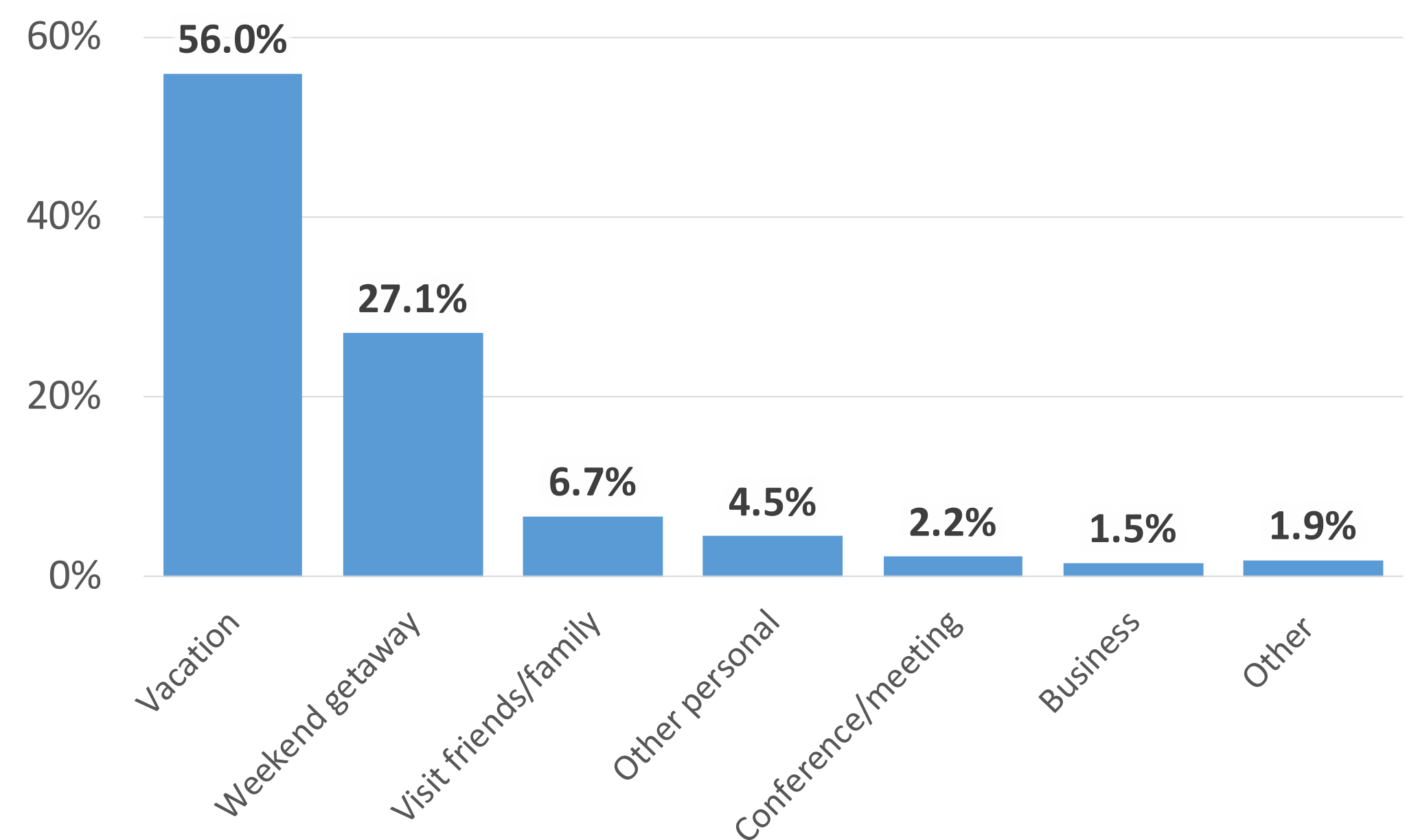


Question: Which best describes where you are in the trip planning process? (Select one)

Base: Respondents gathering information for a trip. 231,789 completed surveys.

DMO Website Users who are Potential Visitors—Intended Trip

Intended Type of Trip
(Respondents gathering information for a trip)



Question: Which best describes the type of travel to [Destination] you are planning or considering?
Base: Respondents gathering information for a trip. 231,789 completed surveys.

The majority of website users gathering trip information were planning travel for their personal leisure (83.1%). 56.0 percent characterized their trip as a vacation and 27.1 percent identified their trip as a weekend getaway. Those website users who were gathering information for a potential or intended trip to the destination planned to spend an average of 3.7 days in-market when they accessed the DMO website.

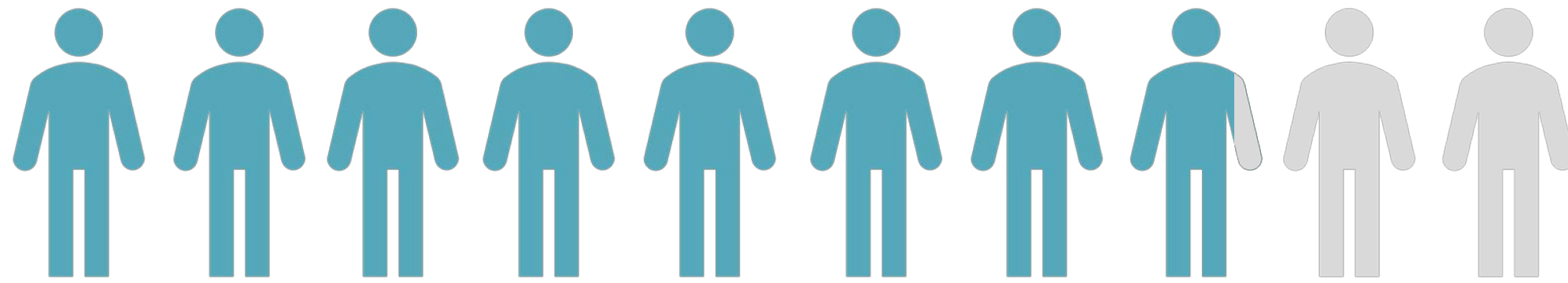
Intended Trip Length
(Respondents gathering information for a trip)



Question: How many days are you likely to stay in [Destination] on this planned or potential visit?
Base: Respondents gathering information for a trip. 231,789 completed surveys.

Visitation to the Destination after using the DMO Website

Visited the Destination
(All follow-up survey respondents)



78.0% of site users who were potential visitors visited the destination after using the DMO website

Question: Since visiting our website, have you visited [Destination]?
Base: All follow-up survey respondents. 21,475 completed surveys.

Nearly eight in ten website users surveyed after using a DMO website for trip research and/or planning purposes indeed visited the destination that site promoted (**78.0%**). This group of website users took an average of 2.4 trips to the destination after using the website.

Average Number of Trips
(Respondents who visited after using the website)

2.4 Trips

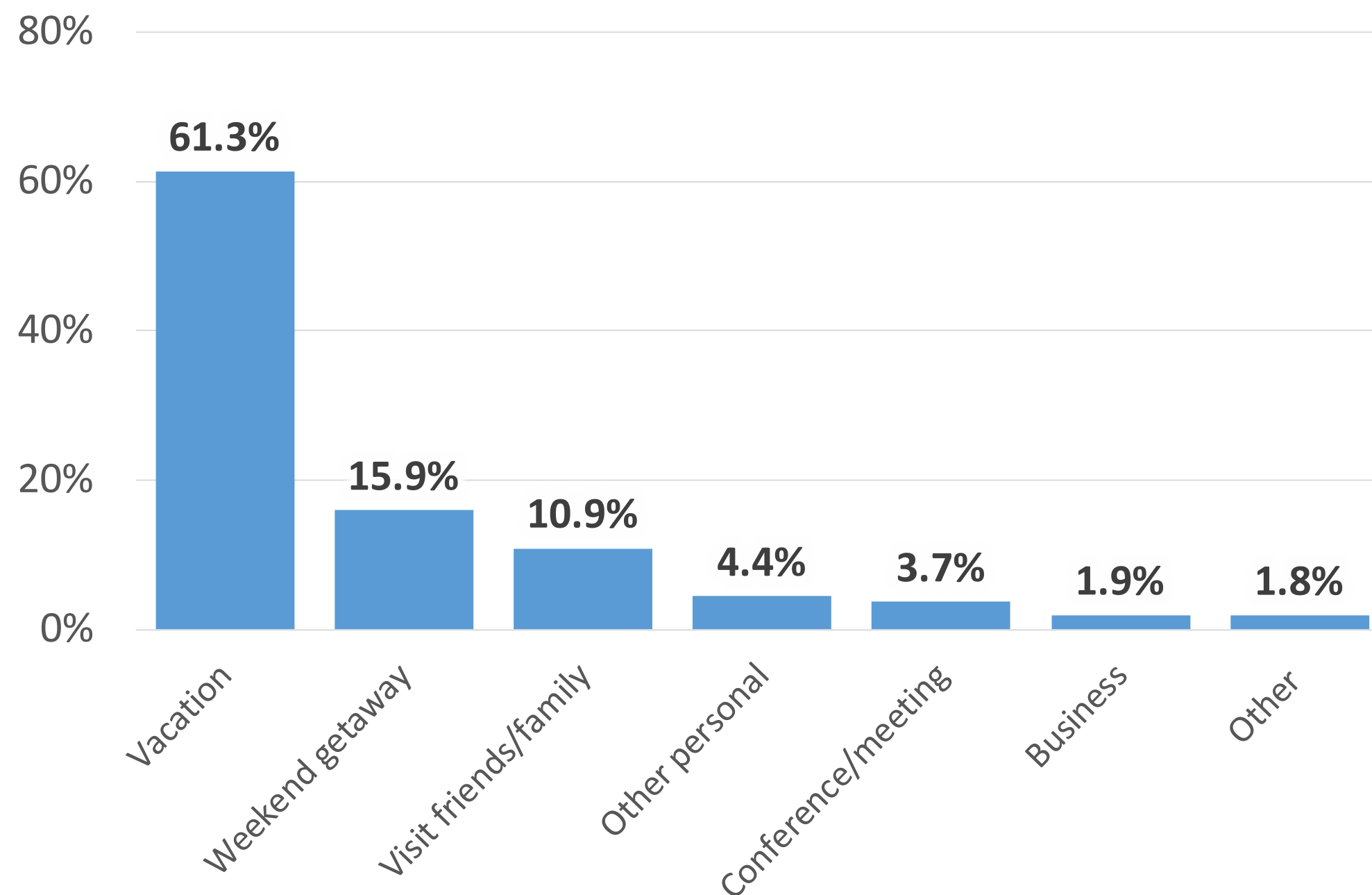


Question: Since visiting our website, how many trips to [Destination] have you made?
Base: Respondents who visited after using the website. 16,756 completed surveys.

Visiting DMO Website Users—Trip Profile

Type of Trip

(Respondents who visited after using the website)



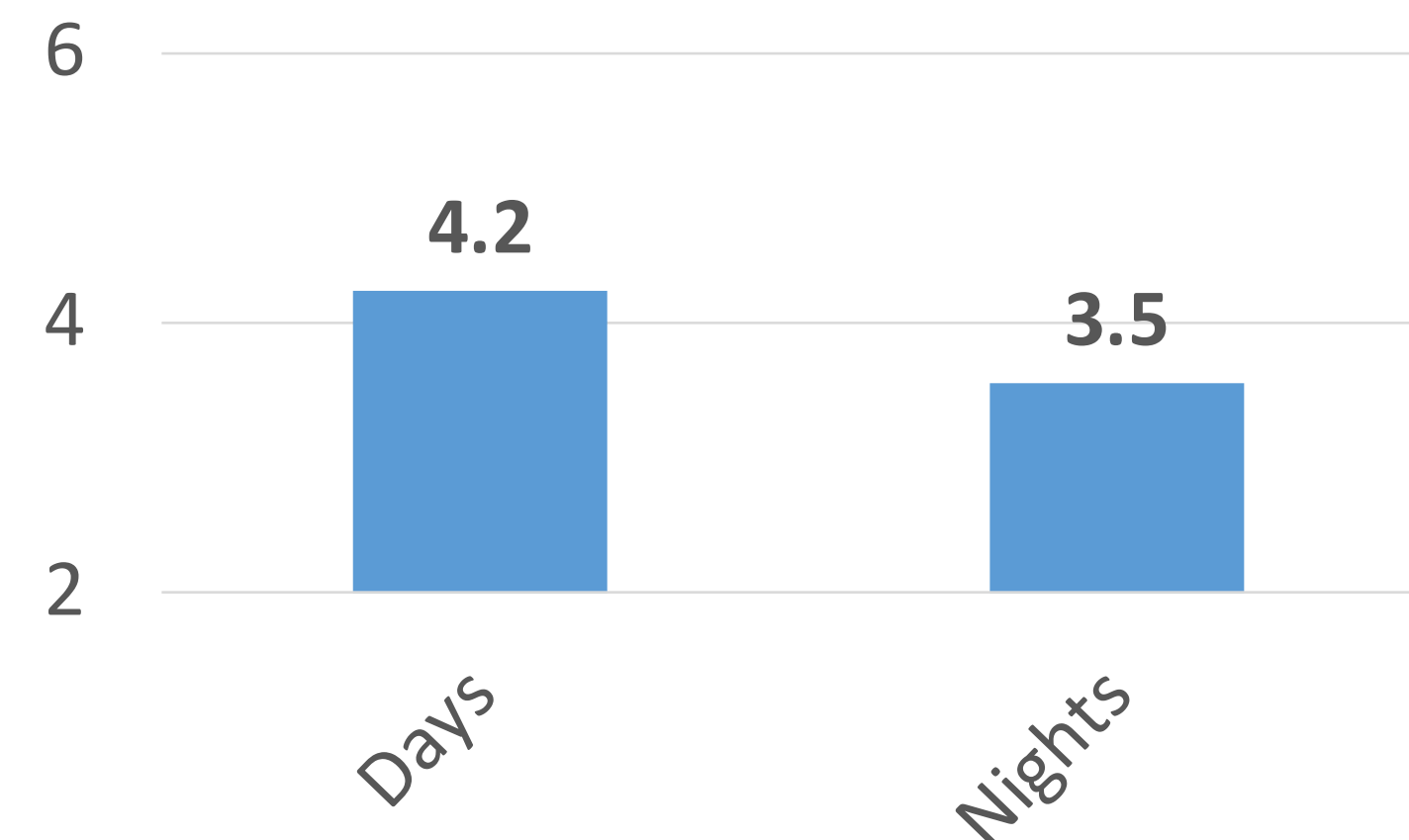
Question: Which of the following best describes the reason for your most recent trip to [Destination]?

Base: Respondents who visited after using the website. 16,756 completed surveys.

Travelers who visited the destination after using the DMO website were more likely to describe the trip they took as a “vacation” than the average DMO website user (61.3% vs. 56.0%) and also likelier to have a longer trip. In total, 61.3 percent of website users who visited the destination after using the website described the trip they took as a vacation and 15.9 percent described it as a weekend getaway. The average length of stay for website users who visited the destination after using the website was 4.2 days and 3.5 nights. This is 0.5 days more than these website users intended to spend in the destination when they were planning their trip (4.2 vs. 3.7).

Average Length of Stay

(Respondents who visited after using the website)



Question: How many total days and nights did you spend in [Destination] on this trip?

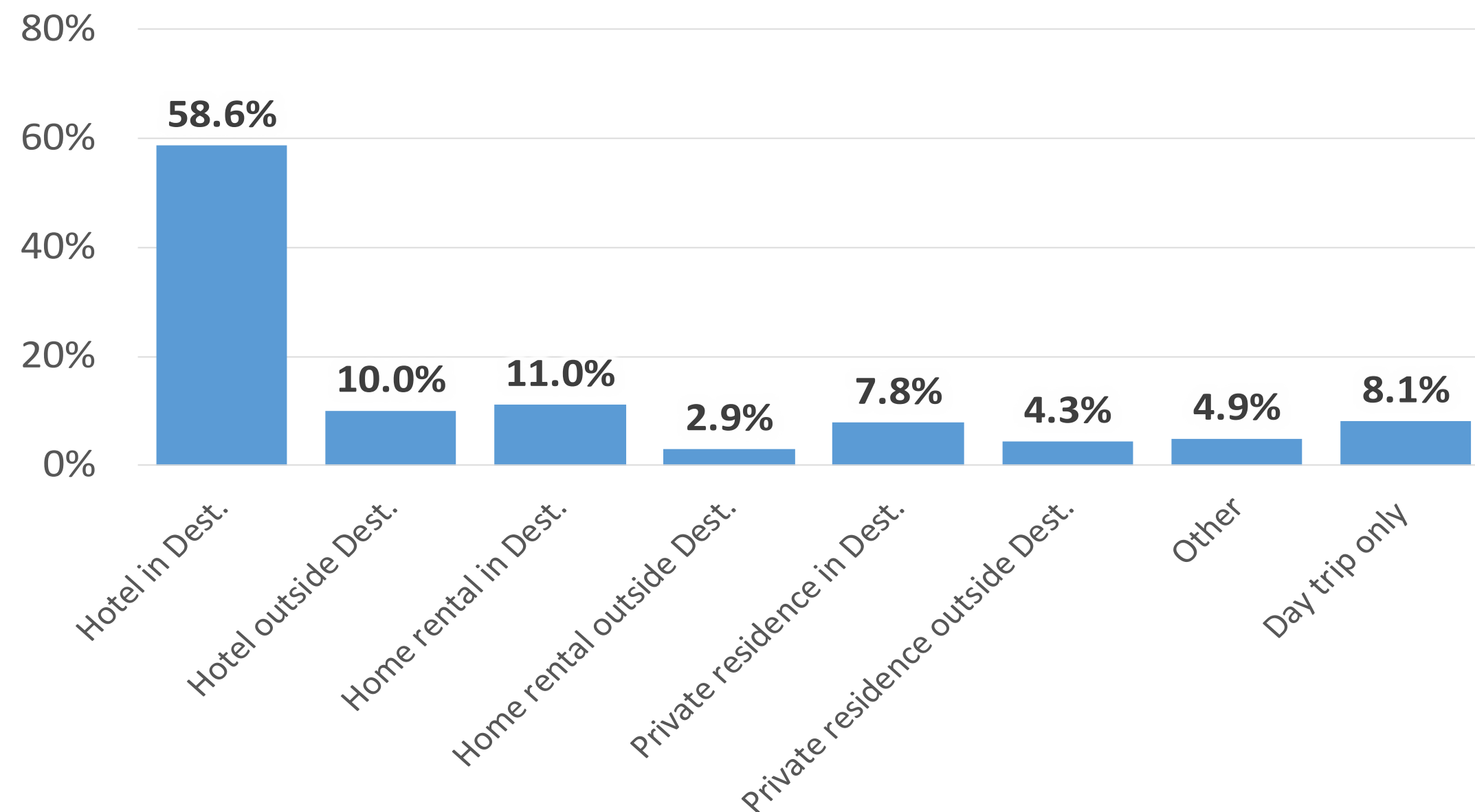
Base: Respondents who visited after using the website. 16,756 completed surveys.

Visiting DMO Website Users—Trip Detail

The majority of visitors to the destination who used the DMO website stayed in in-market commercial lodging during their trip (58.6%). This highlights the DMO website's significant potential to generate incremental room nights for local lodging businesses.

Place of Stay

(Respondents who visited after using the website)



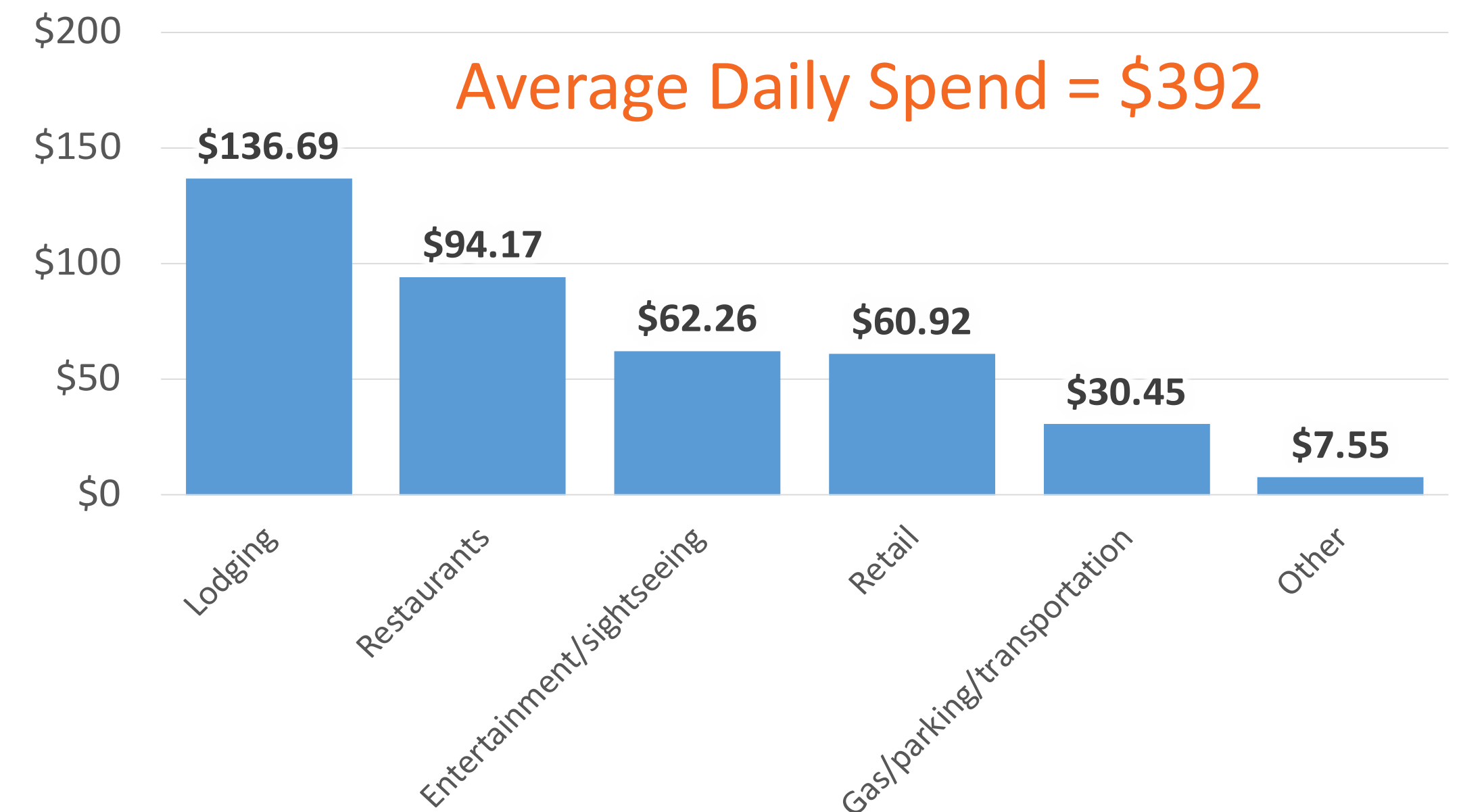
Question: While on this trip, where did you stay in [Destination]? (Select all that apply)

Base: Respondents who visited after using the website. 16,756 completed surveys.

DMO website users who visited the destination reported average in-market daily trip spending of **\$392.04**. This trip spending typically covered 2.5 persons.

Spending Per Travel Party, Per Day

(Respondents who visited after using the website)

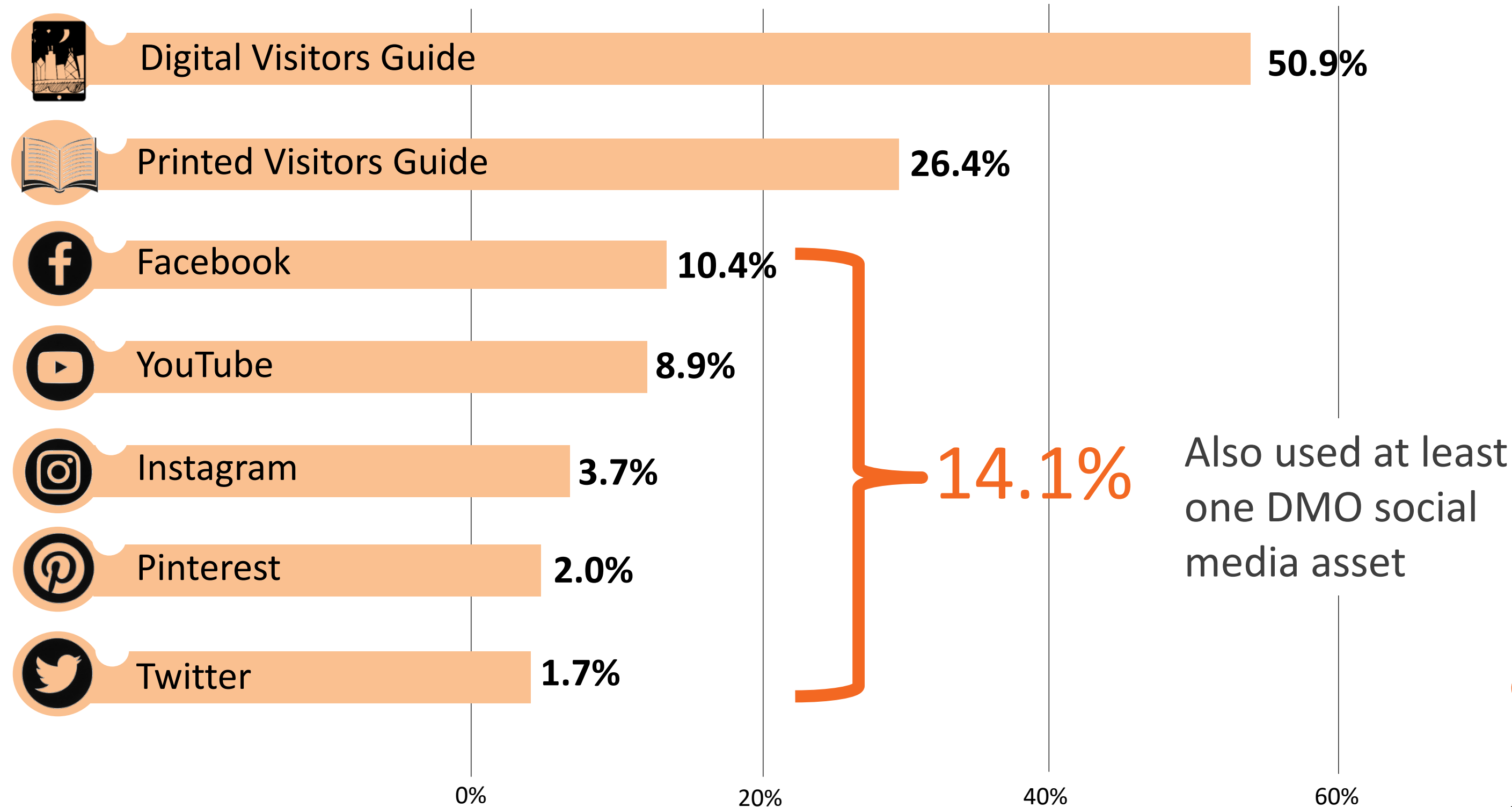


Question: While on this trip, approximately how much IN TOTAL did you spend PER DAY while in [Destination] on each of the following?

Base: Respondents who visited after using the website. 16,756 completed surveys.

Visiting DMO Website Users—Other DMO Resources Used

Official DMO Resources Used
(Respondents who visited after using the website)



DMO website users commonly use other marketing assets and resources provided by the DMO in their trip planning process. The most widely used of these is the official visitors guide—most typically in digital format (50.9%), but also significantly in print (26.4%). In total, 14.1 percent of DMO website users also accessed the DMO’s social media content to plan their trip.

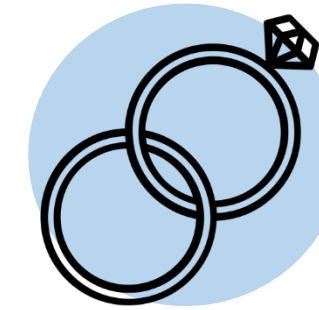
Also used at least one DMO social media asset

Question: Which of these other resources did you use to plan your trip to [Destination]?

Base: Respondents who visited after using the website. 16,756 completed surveys.

DMO Website Users—Demographics

Female – 65.0%
Male – 34.3%



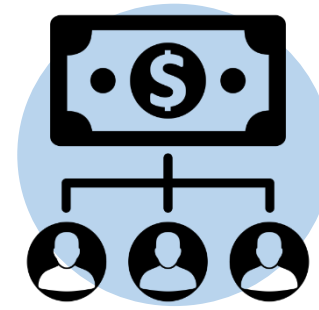
Married/partnered – 72.9%

Mean age – 49.2



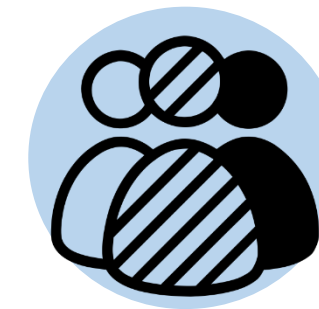
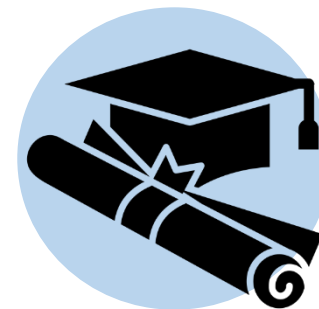
Single – 22.1%

Mean household income – \$95,664



Children under 18 – 21.9%

College or graduate degree – 72.2%



Caucasian ethnicity – 74.6%
Non-Caucasian ethnicity – 25.4%

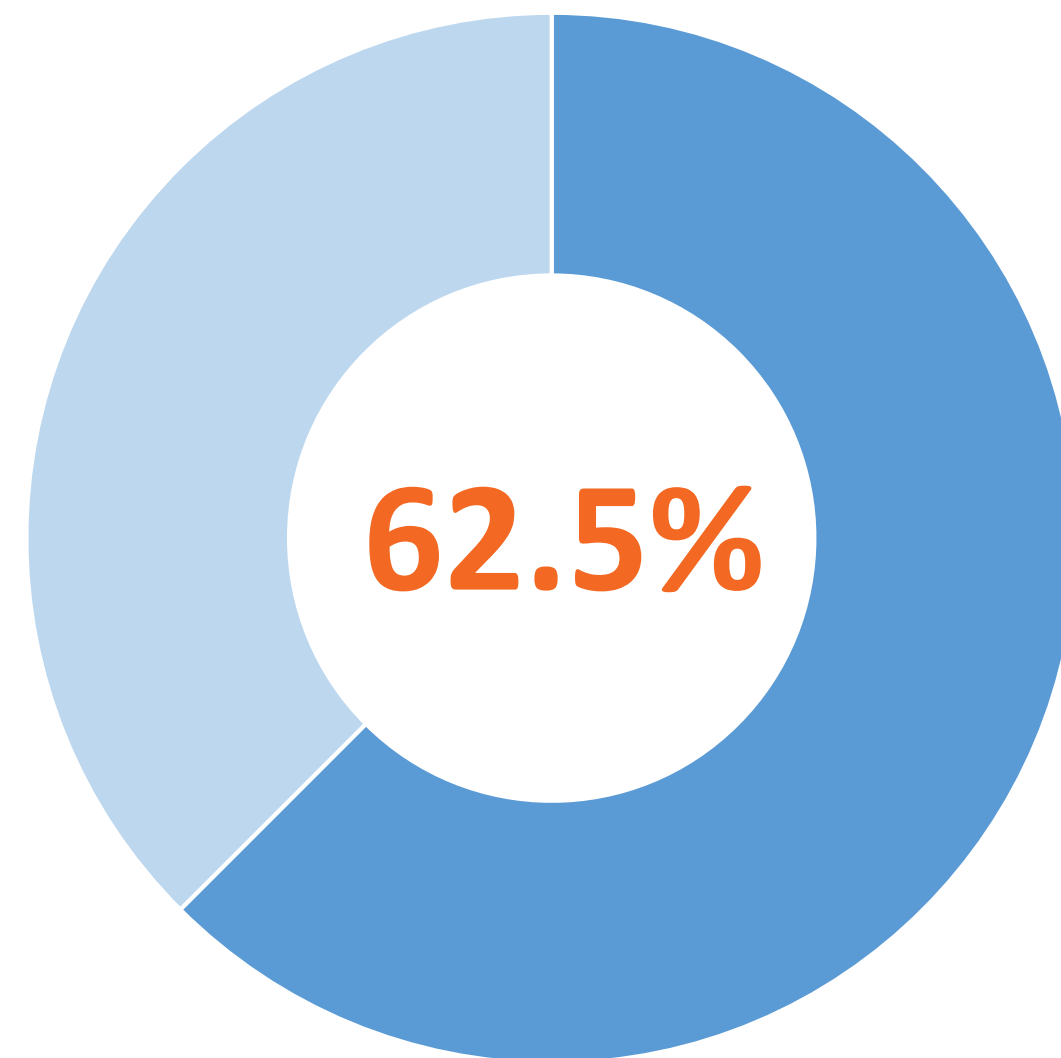
Base: Respondents who visited after using the website.
16,756 completed surveys.

THE INFLUENCE OF DMO WEBSITES

Impact of DMO Website on Destination Decision

DMO websites are generally effective in influencing website users' travel decisions. In total, 62.5 percent of destination visitors who used the DMO website to plan their trip reported some level of influence by the DMO website on their destination decision. Among those who reported that the website influenced their decision to visit, half reported that the DMO website was "Important" (34.3%) or "Very important" (16.5%) to that decision (50.8%). This distinction is significant because it identifies those visitors on what is defined as an incremental trip for the purposes of this research, whose direct spending in the destination was used in the website ROI estimates.

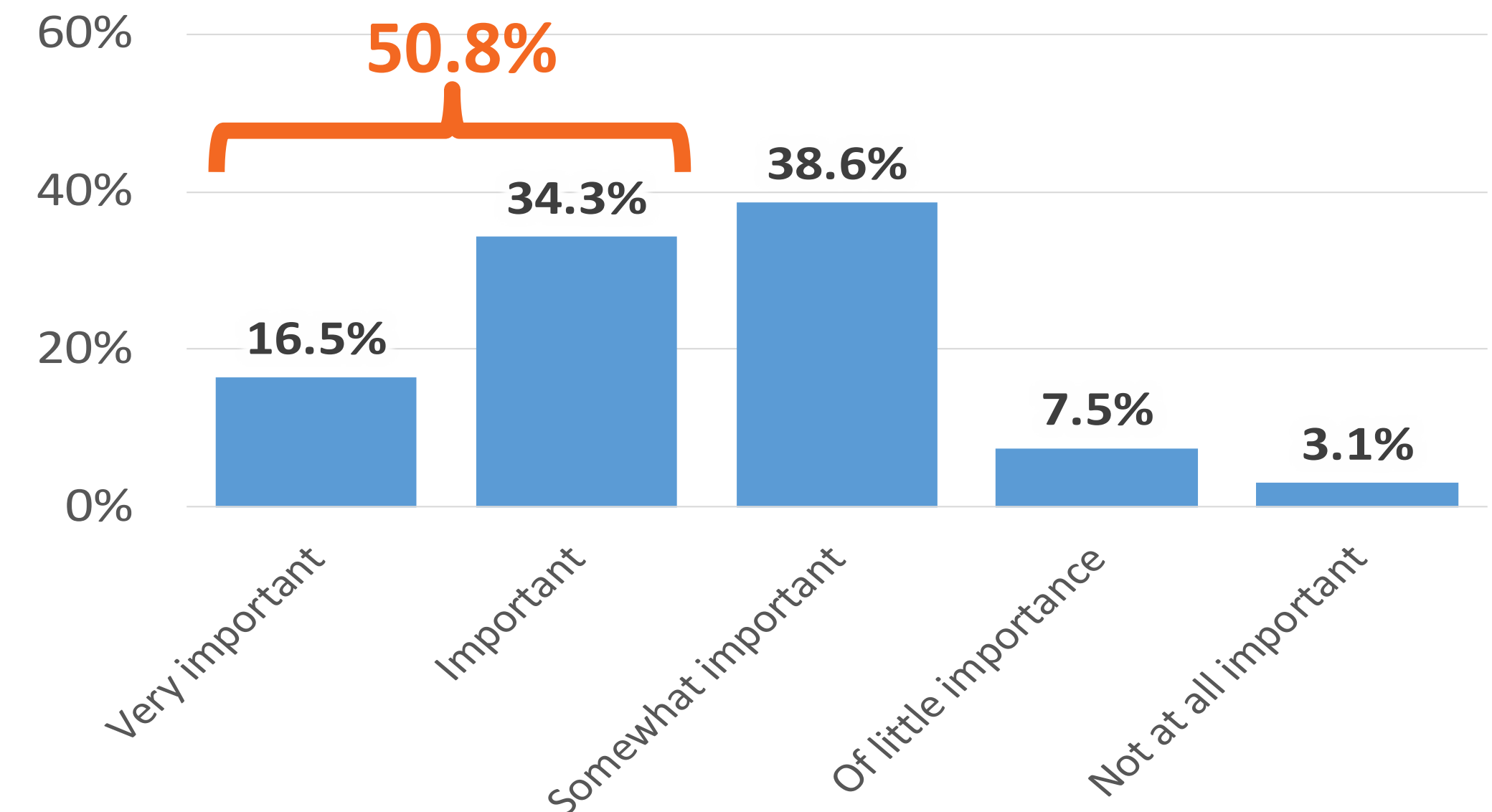
Impact of Website on Destination Decision – % Influenced
(Visitors potentially influenced by the website in the destination decision)



Question: Do you feel that our website helped you make your decision to visit [Destination]?

Base: Visitors potentially influenced by the website in the destination decision. 15,706 completed surveys.

Importance of Website on Destination Decision
(Visitors who reported that the website influenced their destination decision)

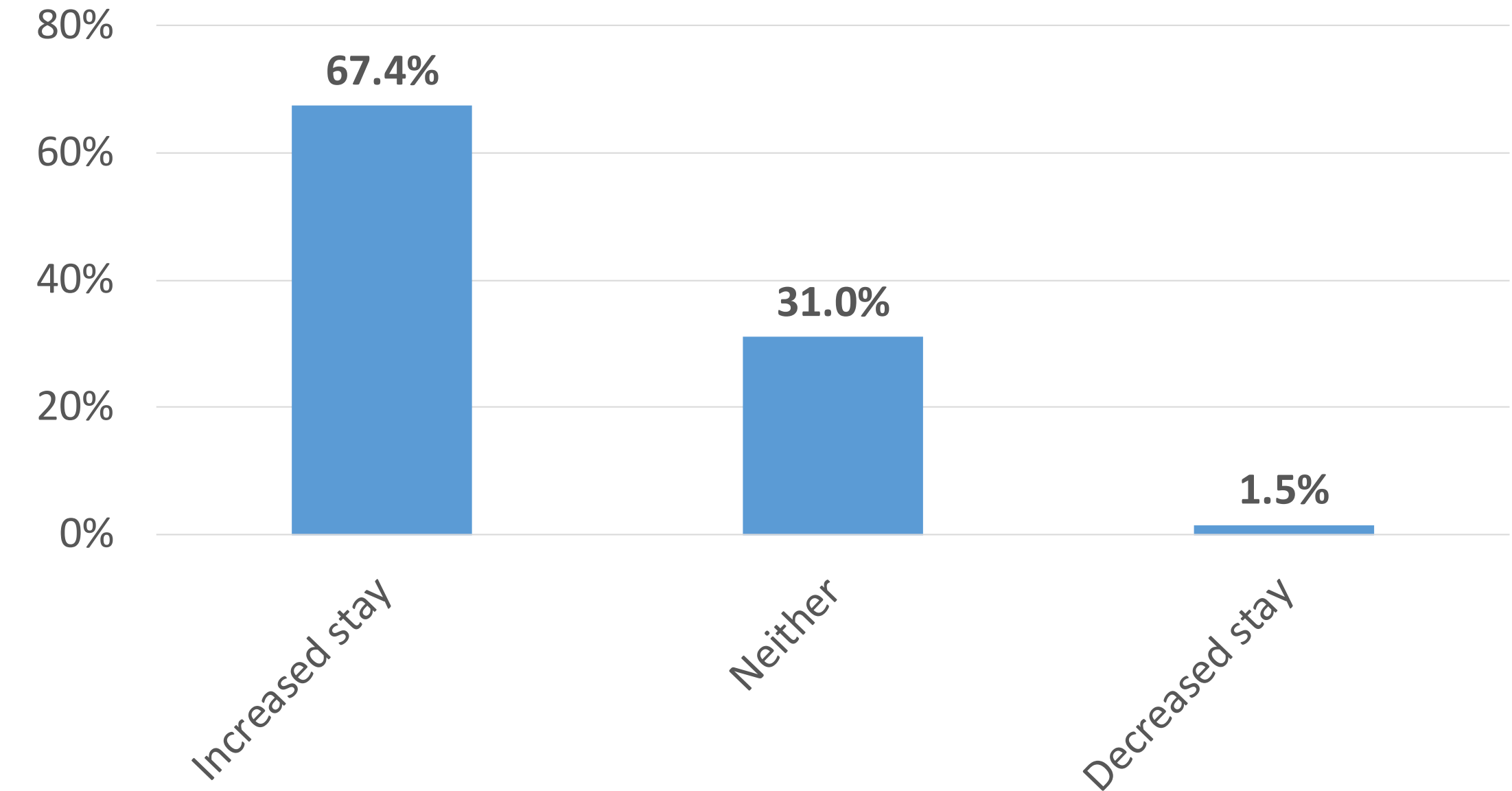


Question: How important was our website to you in making the decision to visit [Destination]?

Base: Visitors who reported that the website influenced their destination decision. 9,832 completed surveys.

Impact of DMO Website on Length of Stay

Impact of Website on Length of Stay
(Visitors potentially influenced by the website in their length of stay*)



*Includes business or conference travelers, as well as leisure visitors, who reported that the website did not influence their destination decision but did influence their length of stay.

Question: How did our website influence the number of days you spent in [Destination] on this trip?
Base: Visitors potentially influenced by the website in their length of stay. 1,162 completed surveys.

Over two-thirds of those DMO website users who stated that the DMO website did not have an impact on their trip decision, but did influence the number of days they ultimately spent in the destination, reported that content on the site increased their intended length of stay by an average of 1.7 days (67.4%).

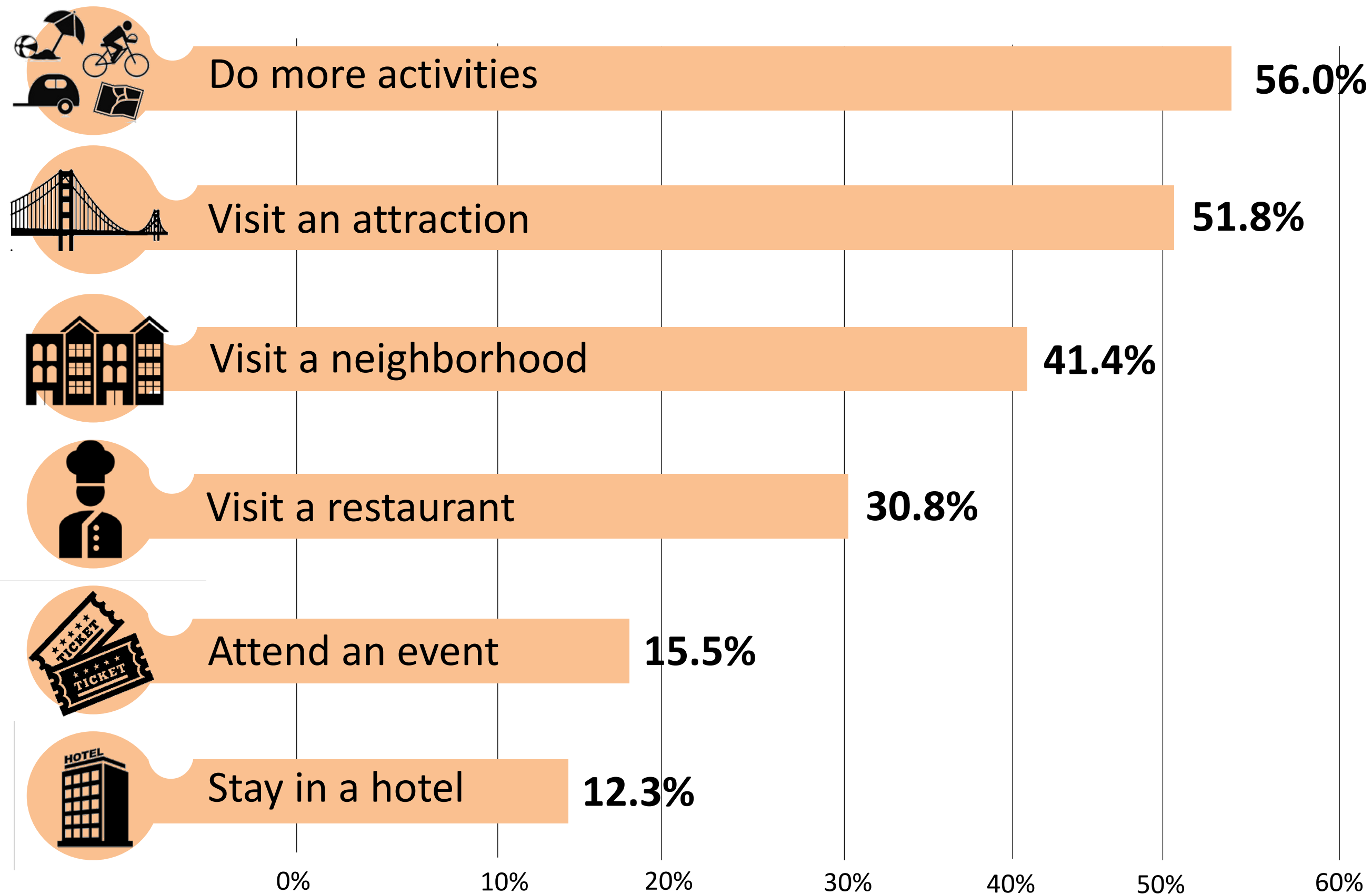
Average Increase on Length of Stay
(Visitors who reported that the website influenced their length of stay)



Question: How many days did you increase the length of your stay in [Destination] as a result of using our website?
Base: Visitors who reported that the website influenced their length of stay. 784 completed surveys.

Trip Decisions Influenced by DMO Website

Trip Decisions Influenced by Website
(Respondents who visited after using the website)



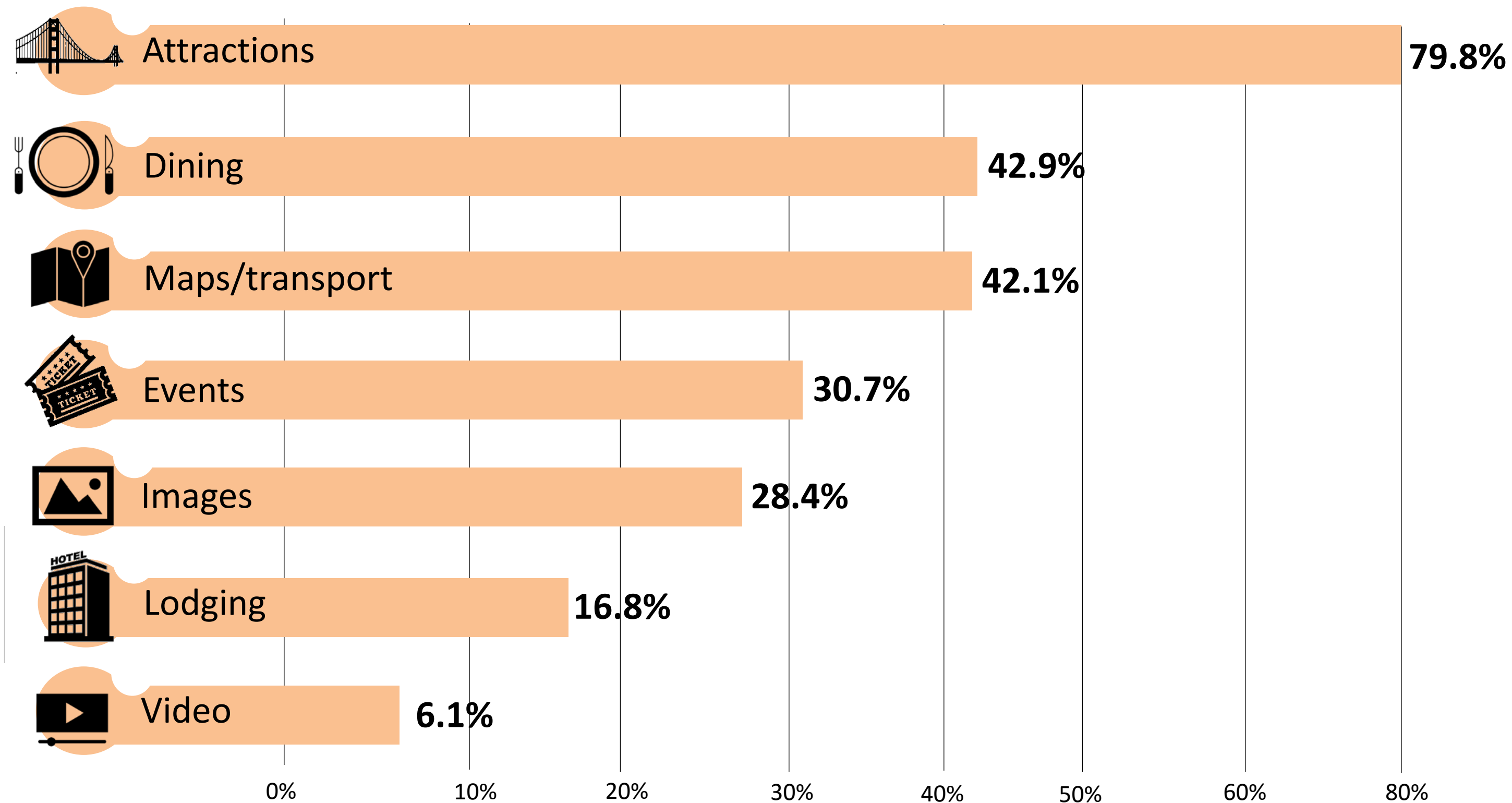
In addition to being an overall driver of incremental visitation to their respective destinations, DMO websites influence the trip decisions made by their users and are generators of increased economic activity by visitors. When DMO websites users who visited the destination were asked about their trip decisions that may have been influenced by the site, 56.0 percent said the site motivated them to do more activities on their trip than they had intended. Over half said the site influenced them to visit one or more attractions in the destination (51.8%). Four in ten visited a certain neighborhood (41.4%) and three in ten dined at one or more restaurants (30.8%) as a result of content accessed on the DMO website.

Question: Did [website] influence you to do any of the following? (Please select all that apply)

Base: Respondents who visited after using the website. 16,756 completed surveys.

Most Influential DMO Website Content

Most Influential Website Content
(Respondents who visited after using the website)



Content on DMO websites related to attractions and things to do in the destination is the most influential in converting users to visitors. When website users who visited the destination were asked about the specific types of content on the site that were influential, eight in ten said attractions information (79.8%). Dining and restaurants (42.9%) and maps and transportation (42.1%) content are also importantly influential. In addition, event information (30.7%) and the website's images (28.4%) are motivational to many DMO website users in their trip decisions.

Question: What types of content and media on our website were most influential to you in deciding to visit and/or planning your visit to [Destination]?

Base: Respondents who visited after using the website. 16,756 completed surveys.

OPINIONS ON DMO WEBSITES

Perceptions and Ratings of DMO Websites

DMO websites are highly likely to be recommended by their users to others planning a trip to the destination. On a 10-point scale, DMO website users rated their likelihood to recommend the DMO website to others planning a trip to the destination an 8.1 on average. When asked to describe the DMO website they used, website users who traveled to the destination most commonly agreed the site was “well-organized” (54.5%) and that it communicates what it’s like to be in the destination (53.0%). The sites are often seen as “comprehensive” (44.9%) and “detailed” (37.0%). There is important opportunity for more DMO websites to be perceived as “fun,” “inspirational” and “unique.”

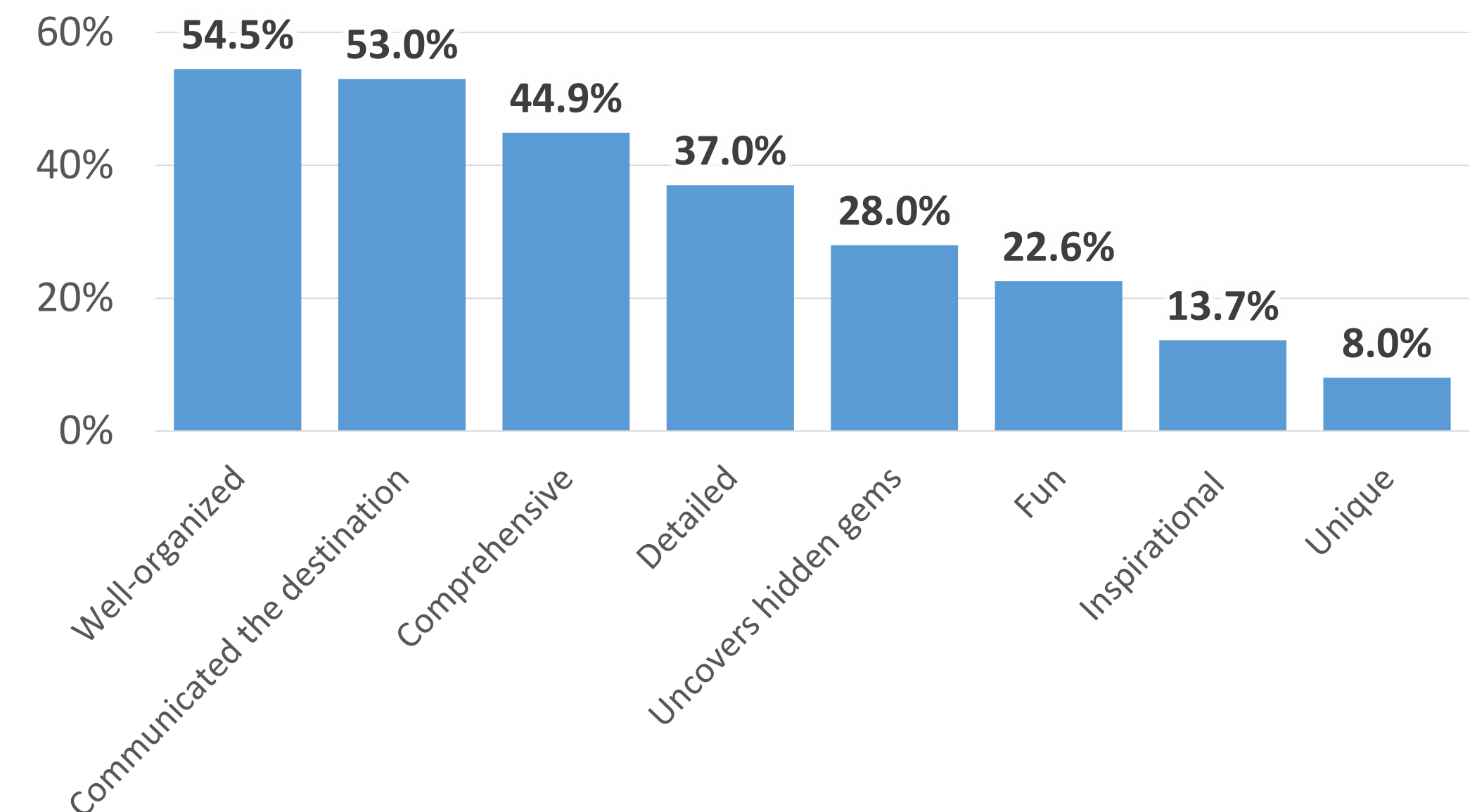
Likelihood to Recommend the Website – 10 Point Scale
(Respondents who visited after using the website)

8.1 Out of 10



Question: How likely would you be to recommend [website] to others planning a trip to [Destination]?
Base: Respondents who visited after using the website.
16,756 completed surveys.

Descriptions of Website Content
(Respondents who visited after using the website)



Question: Which of these words and phrases (if any) describe the content available on our website?
Base: Respondents who visited after using the website.
16,756 completed surveys.

HOW DMO WEBSITES ARE USED: THE AVERAGE DMO WEBSITE USER BY TRAVEL PLANNING STAGE

DMO Website Use By Travel Planning Stage

The infographics and summary of key findings on the next pages present the insights derived from the analysis of website user survey data and site analytics* for all 13 participating DMO websites. These findings are based on the average website user who reported planning a trip to the destination, segmented by the following three stages in the travel planning process:

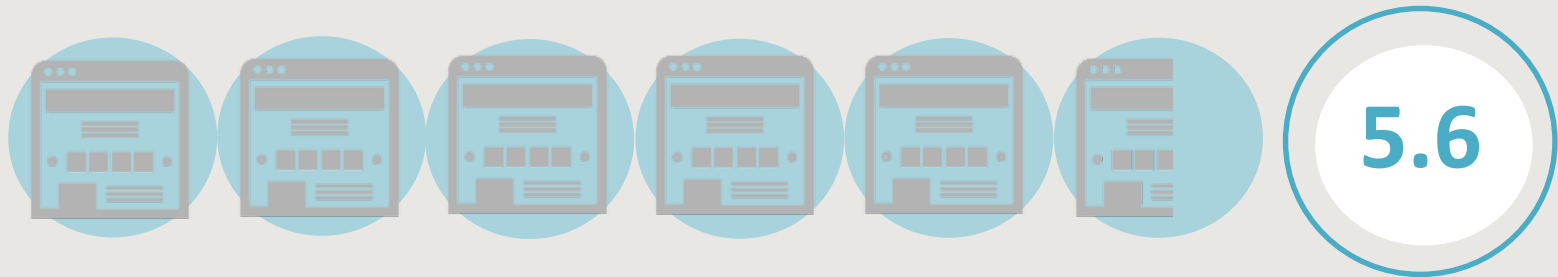
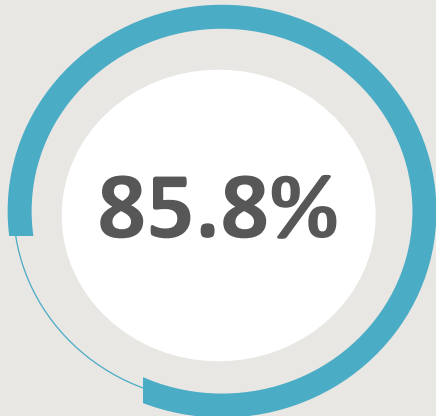

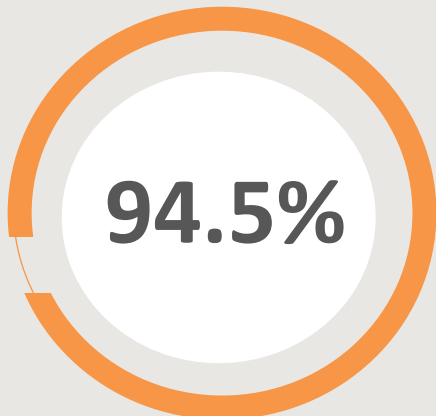

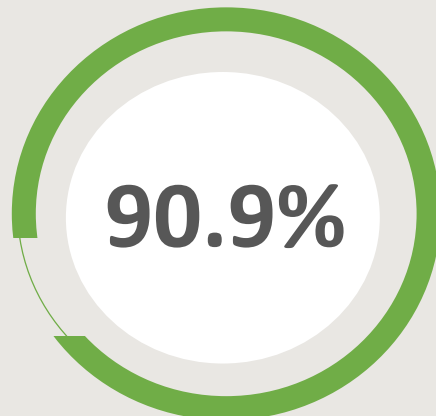
- **Decided** website users had already made the decision to visit the destination when they arrived at the website.
- **Interested** website users were interested in visiting the destination, but have not yet made any firm travel plans.
- **Considering** website users were simply considering destinations for a leisure trip.



This data was calculated by averaging the site analytics findings of all participating DMO websites, weighted by web traffic during the period of study.

**Source: Google Analytics*

THE AVERAGE DMO WEBSITE USER—BY TRAVEL PLANNING STAGE

| Average Number of Page Views | Average Session Duration | Percent of New Users |
|---|--------------------------|--|
| DECIDED | | |
|  | 00:09:10 |  <div>Of potential visitors who already decided to visit are new users</div> |
| INTERESTED | | |
|  | 00:08:24 |  <div>Of potential visitors who are interested in visiting are new users</div> |
| CONSIDERING | | |
|  | 00:07:15 |  <div>Of potential visitors who are considering travel destinations are new users</div> |

THE AVERAGE DMO WEBSITE USER—BY TRAVEL PLANNING STAGE

Site Acquisition

Top 5 Page Types

DECIDED

| | |
|-------------------------------|---------------------------|
| Organic Search (64.1%) | Paid Search (5.6%) |
| Direct (10.9%) | Referral (8.5%) |



Event Calendar
Things to Do
Travel Guide & Email Newsletter Request
Deals/Promotions
Maps/Map Request

INTERESTED

| | |
|-------------------------------|---------------------------|
| Organic Search (56.3%) | Paid Search (6.6%) |
| Direct (9.7%) | Referral (10.6%) |



Articles/Travel Blog
Travel Guide & Email Newsletter Request
Things to Do
Maps/Map Request
Things to Do—Specific

CONSIDERING

| | |
|-------------------------------|---------------------------|
| Organic Search (55.7%) | Paid Search (7.2%) |
| Direct (9.1%) | Referral (10.3%) |



Articles/Travel Blog
Things to Do
Travel Tips
Event Calendar
Maps/Maps Request

DMO Website Use By Travel Planning Stage—Key Takeaways

- On average, website users who already decided to visit the destination spend the most time and view the most number of pages on the DMO website. **DMOs with significantly lower time on site and page views from their undecided audience should adopt tactics to engage this “convertible” audience further.**
- DMO website users who still have not yet made the decision to visit the are more likely to be new site visitors. **DMOs can monitor this along with overall site traffic to look for indicators as to whether the site is bringing in new audiences which represent potential visitors, as well as indicators of the site experience encouraging repeat visitation.**
- Of the three travel planning segments, those who are already decided on the destination are the likeliest to arrive at the site via organic search and directly typing the URL into their web browser. Those in interested and consideration phases are likelier than the decided users to arrive via paid search. **Those DMOs who invest in paid advertising campaigns tracked in their analytics should pay particular attention to this metric in order to ensure that these advertising efforts are delivering a “convertible” audience rather than just those who have already decided on the destination.**
- Those in the interested and consideration phases, who are potentially convertible by the DMO website, most view articles and blog content, while those who have already decided to visit most view the Event Calendar. **DMOs can monitor this metric to make site content strategy decisions that drive key audiences to the desired pages.**

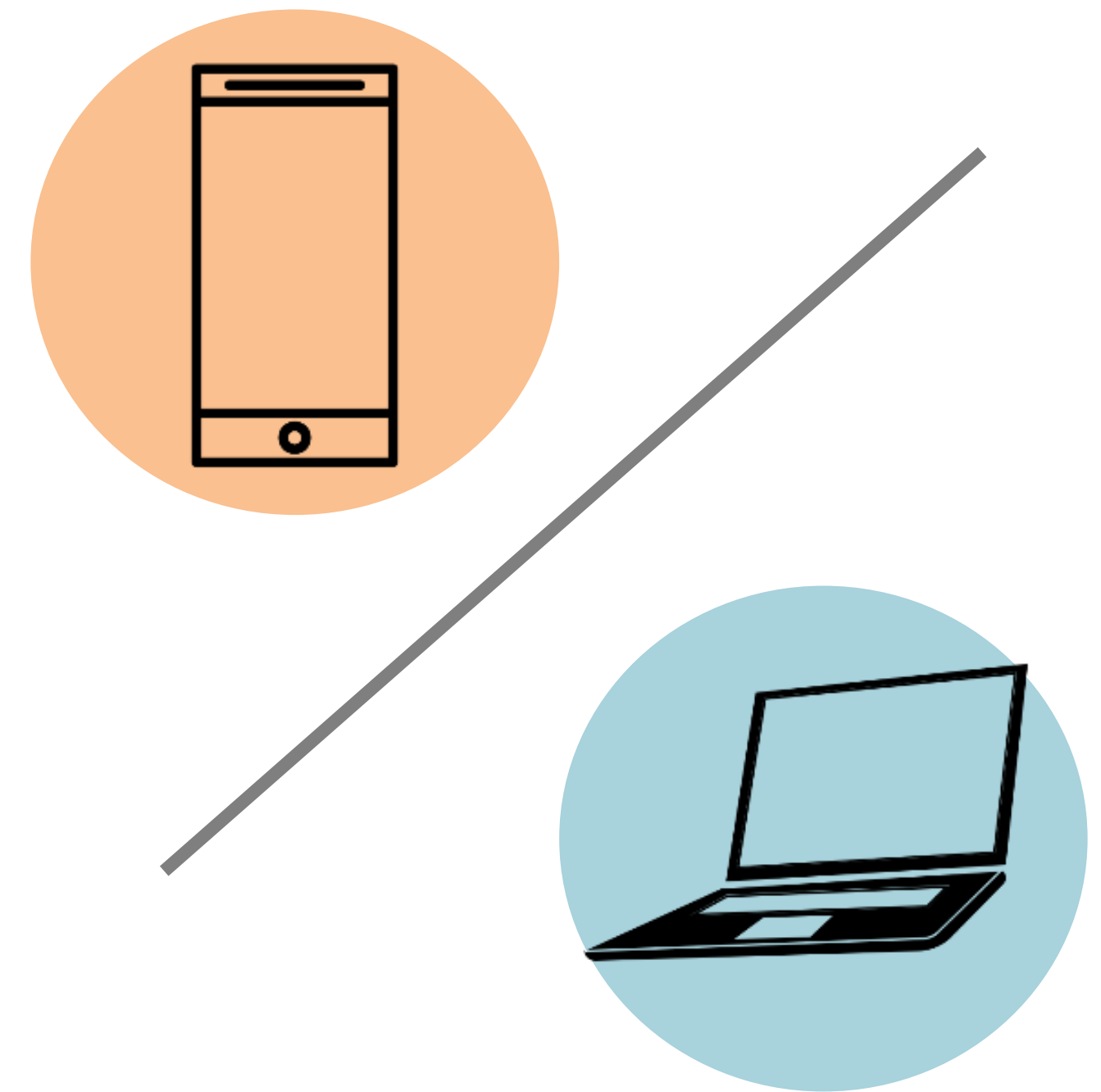
HOW DMO WEBSITES ARE USED: THE AVERAGE DMO WEBSITE USER BY DEVICE

DMO Website Use By Device

The infographics and summary of key findings on the next pages present the insights derived from the analysis of website user survey data and site analytics for all 13 participating DMO websites, and are based on website user averages, segmented by the device they accessed the site on.

- **Desktop users** accessed the DMO website on a traditional desktop/laptop or tablet.
- **Mobile users** accessed the DMO website on a mobile device/smartphone.

This data was calculated by averaging the analytics findings of all participating DMO websites, weighted by web traffic during the period of study.

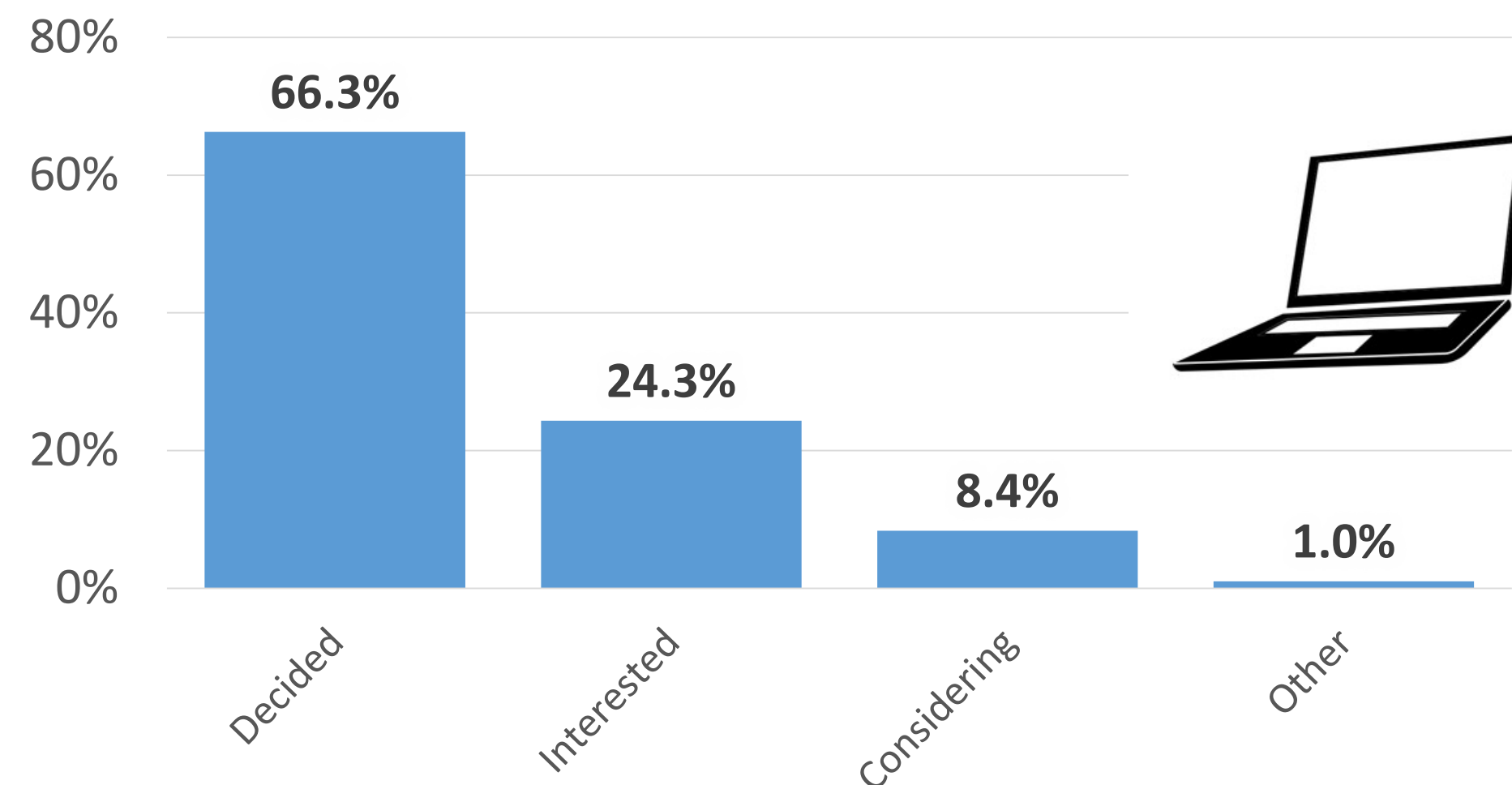


Point in Travel Decision Process—Desktop vs. Mobile Site Users

DMO website users gathering trip related information on the site on a mobile device are even likelier to be in the inspiration or consideration phase than those accessing the site on a traditional device. In total, 44.3 percent of these mobile DMO website users were either “interested” in visiting the destination but had not yet made travel plans, or were simply “considering” travel destinations when they arrived on the website, compared to 32.7 percent of desktop users who were in this stage.

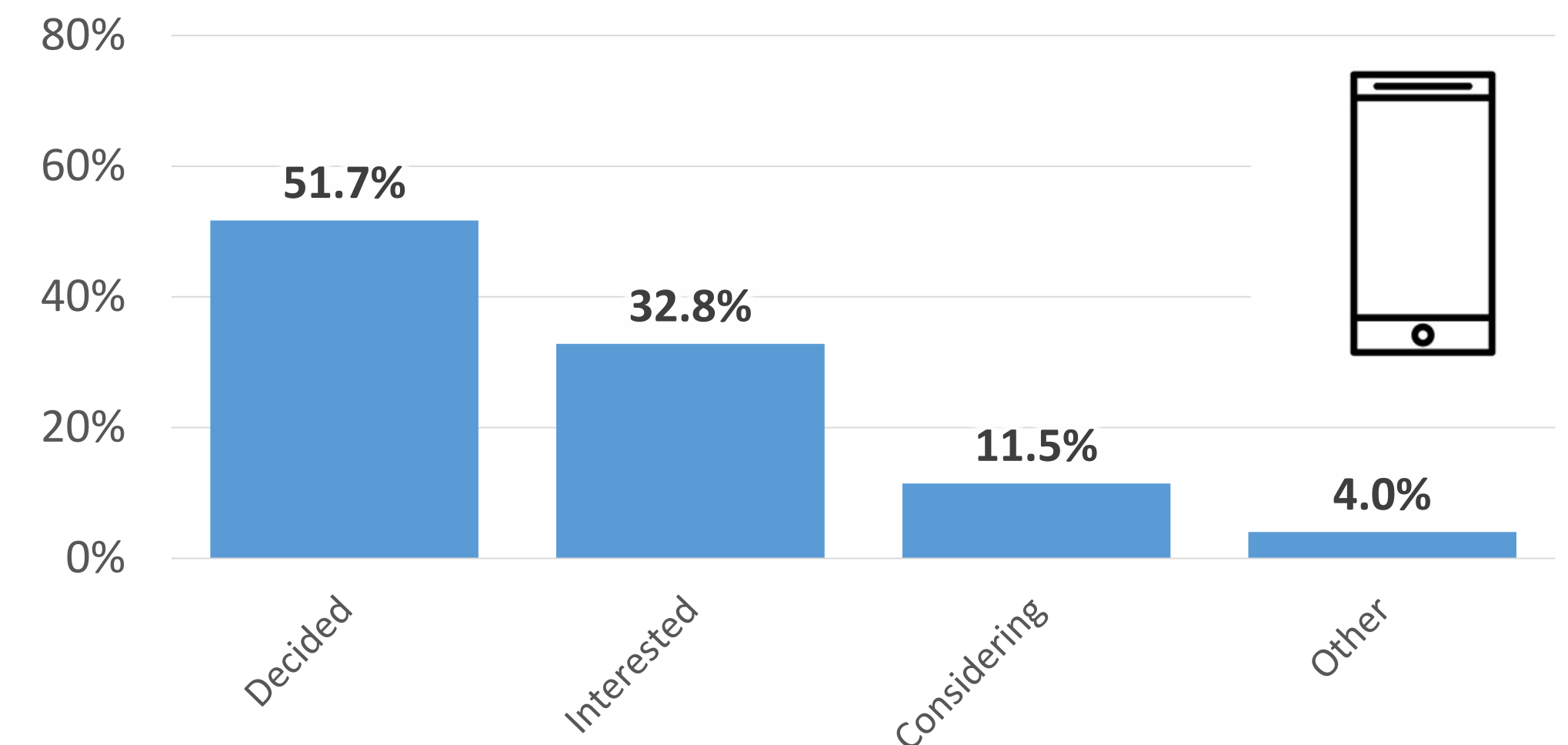
Point in Travel Decision Process—Desktop Users

(Respondents gathering information for a trip on a desktop)



Point in Travel Decision Process—Mobile Users

(Respondents gathering information for a trip on a mobile device)



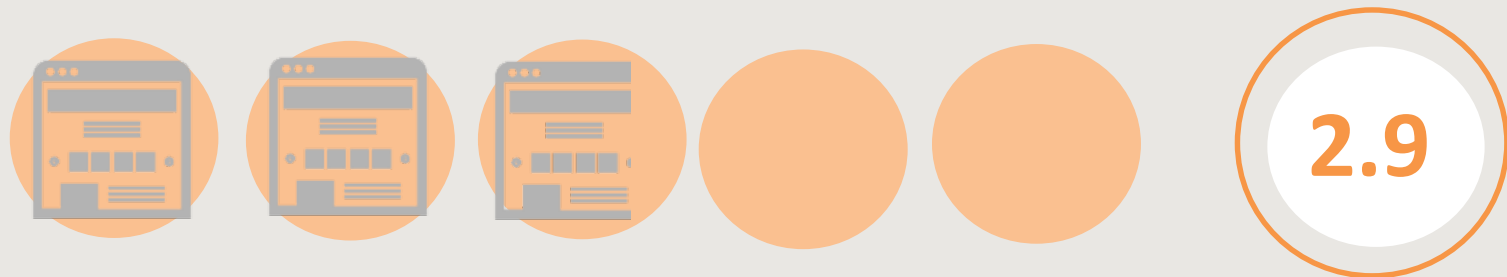
THE AVERAGE DMO WEBSITE USER—BY DEVICE

Average Number of Page Views

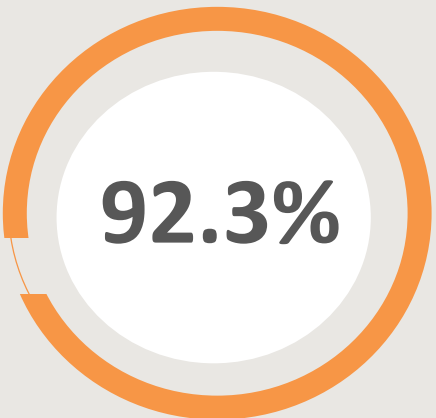
Average Session Duration

New Users

MOBILE

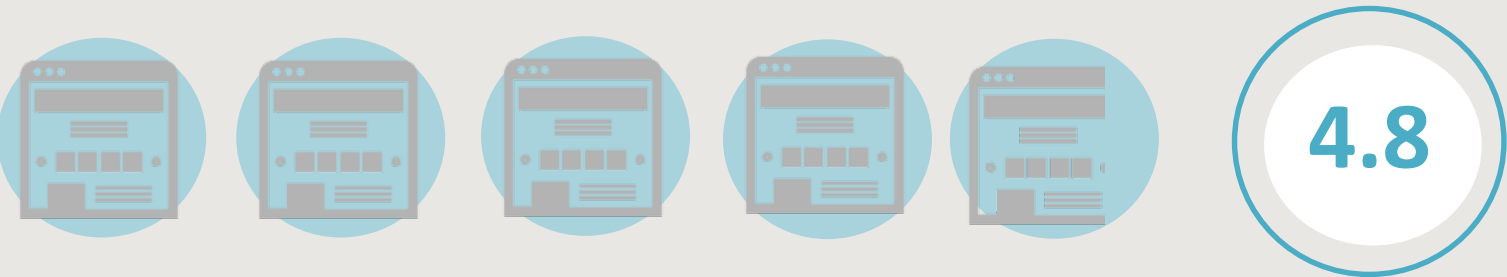


00:03:40



Of mobile users
are new users

DESKTOP



00:06:40



Of desktop users
are new users

THE AVERAGE DMO WEBSITE USER—BY DEVICE

Site Acquisition

Top 5 Page Types

MOBILE

| | |
|-------------------------------|---------------------------|
| Organic Search (55.1%) | Paid Search (8.7%) |
| Direct (14.6%) | Referral (7.2%) |



Event Calendar
Things to Do
Itineraries/Planning
Things to Do—Specific
Travel Guide & Newsletter Request

DESKTOP

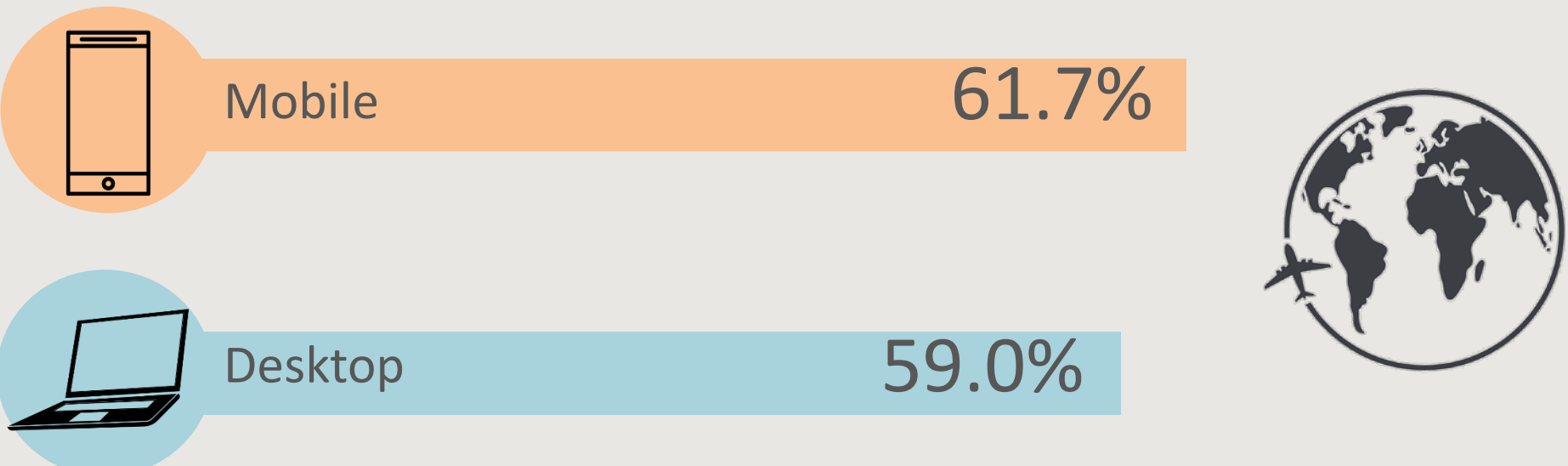
| | |
|-------------------------------|----------------------------|
| Organic Search (58.4%) | Paid Search (10.2%) |
| Direct (10.1%) | Referral (11.5%) |



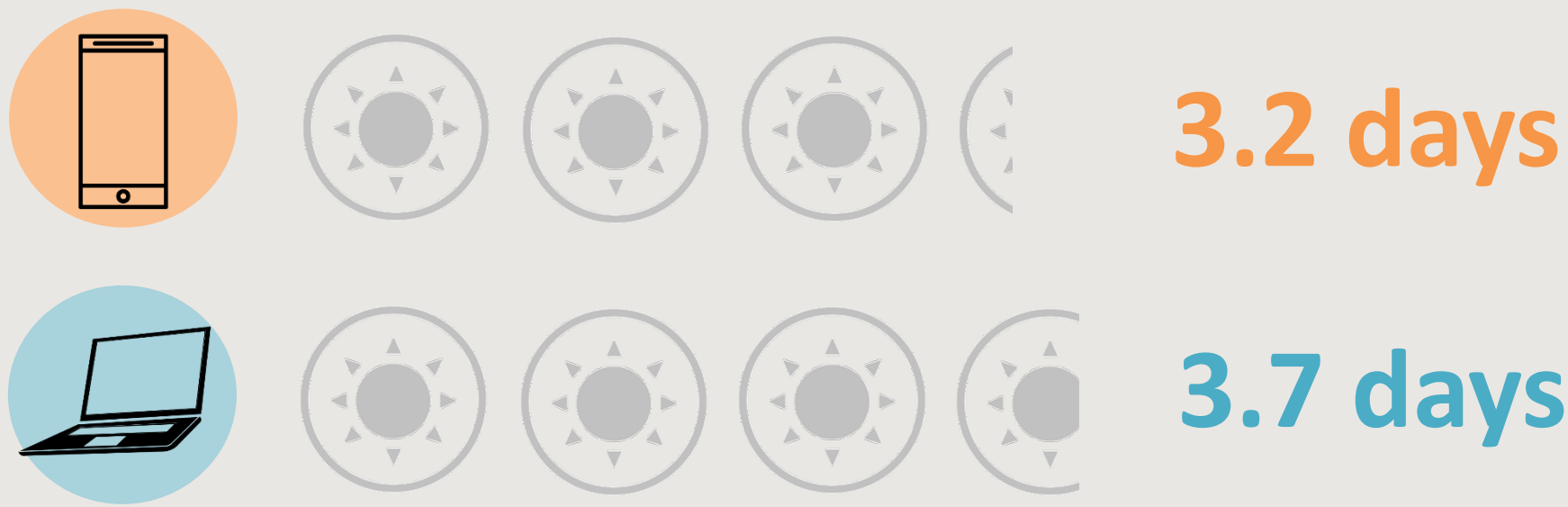
Event Calendar
Things to Do
Travel Guide & Newsletter Request
Places to Stay
Itineraries/Planning

THE AVERAGE DMO WEBSITE USER—BY DEVICE

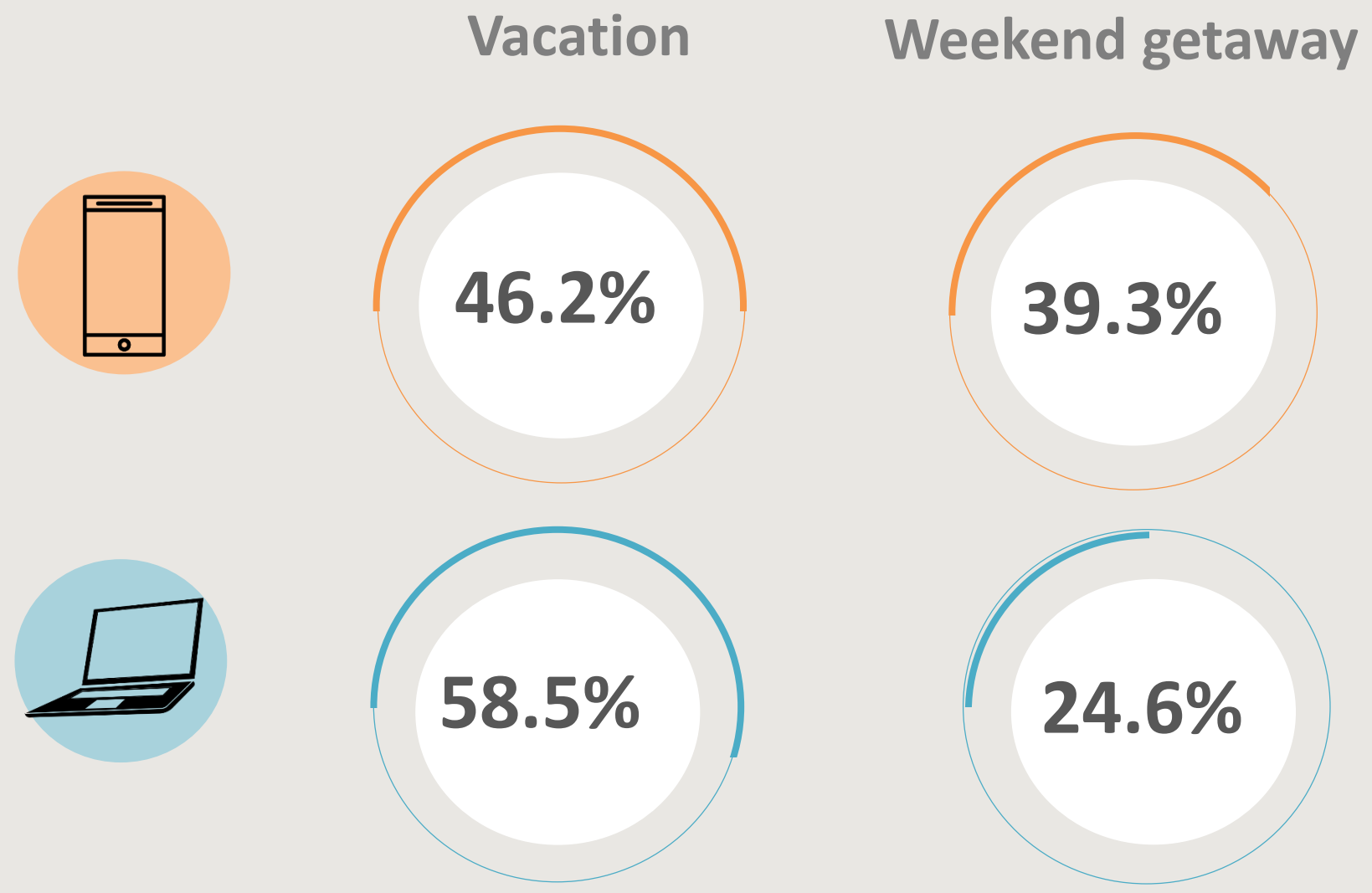
Percent Gathering Information for a Trip



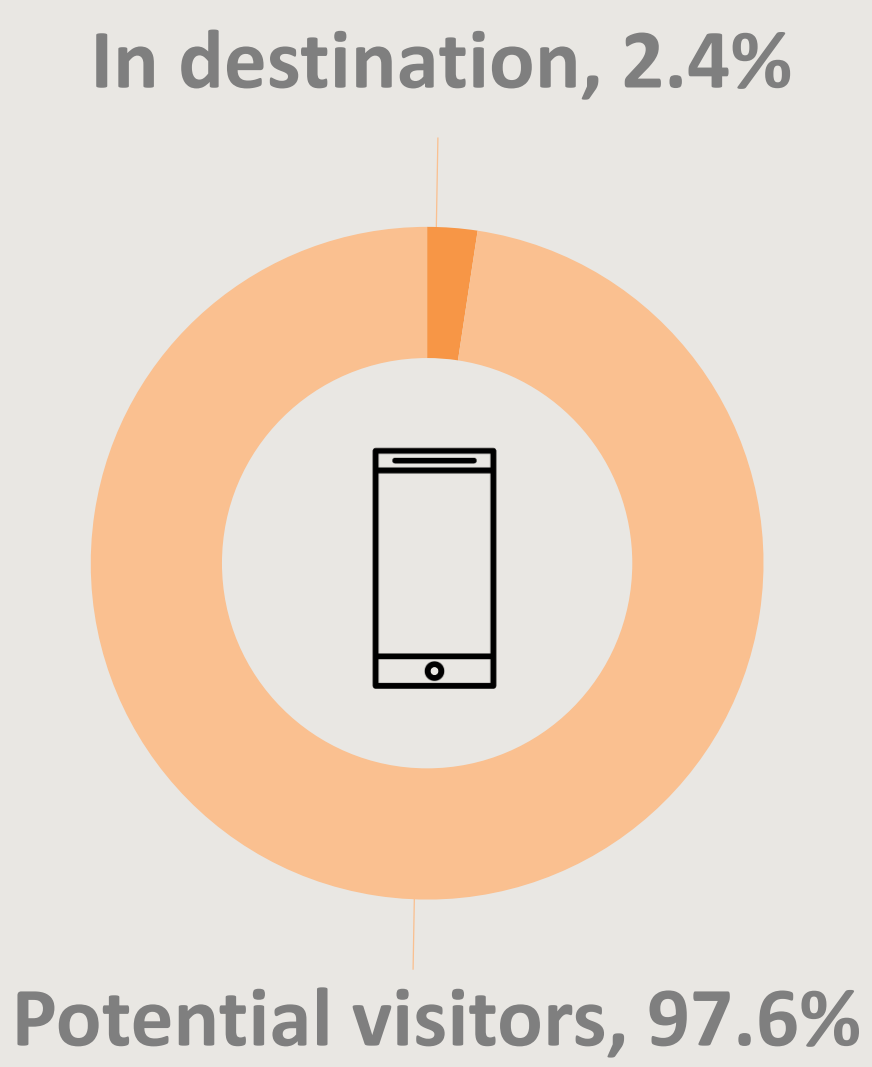
Average Intended Length of Stay



Percent Planning a Vacation or Weekend Getaway



Potential Visitors vs. Users Currently in Destination



DMO Website Use By Device—Key Findings

- Mobile users are more likely to be planning or considering weekend getaway travel (desktop users are more typically vacations) and intend to spend fewer days in the destination.
- Desktop users spend more time and view more pages on these sites on average compared to mobile users.
- While mobile and desktop users tend to view similar types of pages on a DMO website, accommodations content is amongst the top accessed by desktop users and mobile users are often seeking specific things to do content.
- Mobile users are typically more likely to be new site users than desktop users.
- Mobile users are more likely to directly go the DMO site, while desktop users are more apt than mobile users to arrive to these sites via referral.
- Mobile users are more likely to be in the destination at the time of accessing the website than desktop users.

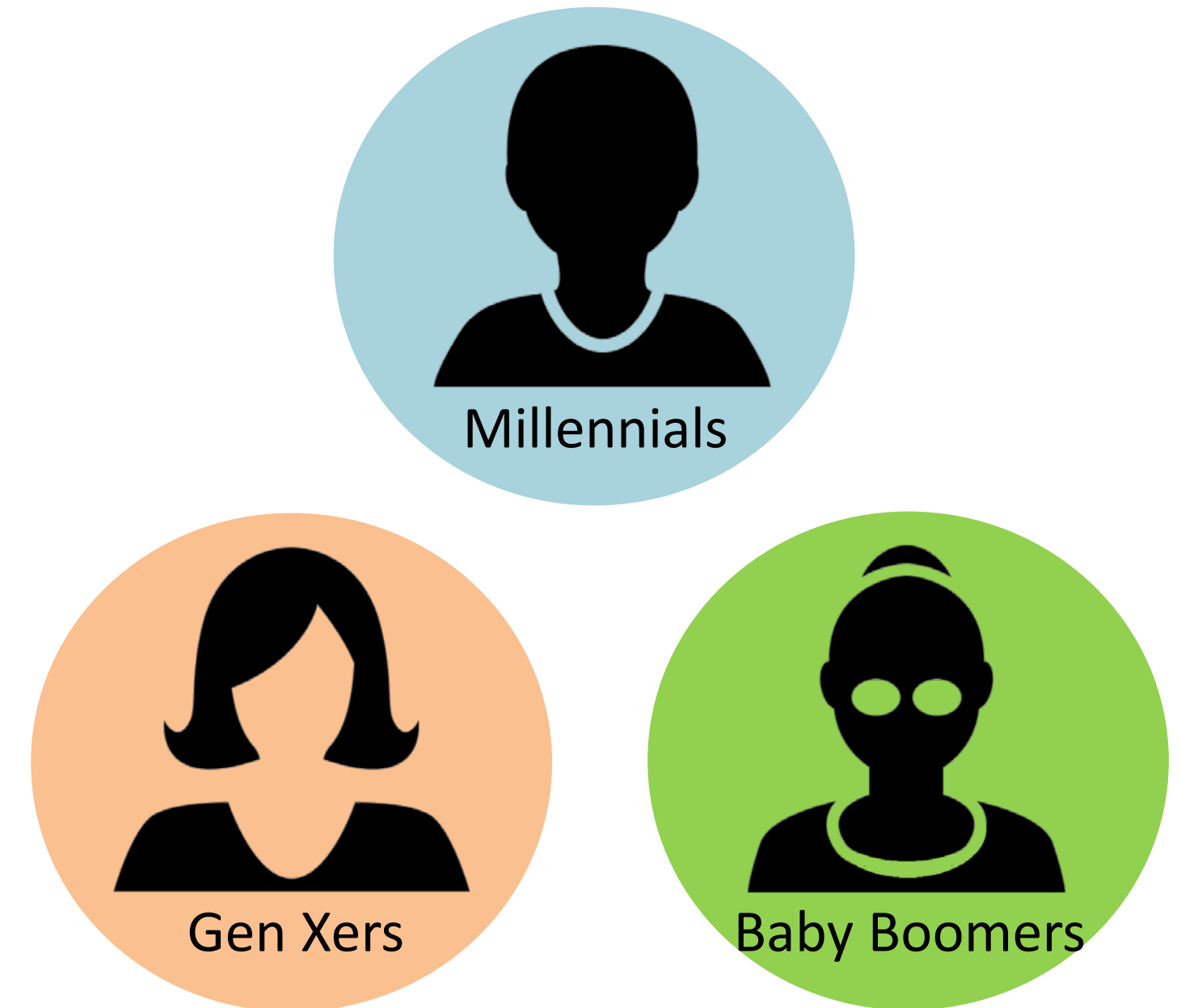
HOW DMO WEBSITES ARE USED: THE AVERAGE DMO WEBSITE USER BY GENERATION

DMO Website Use By Generation



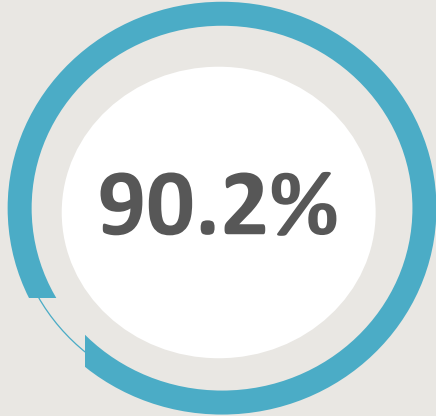


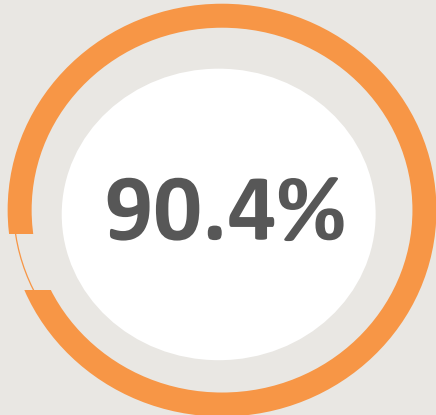


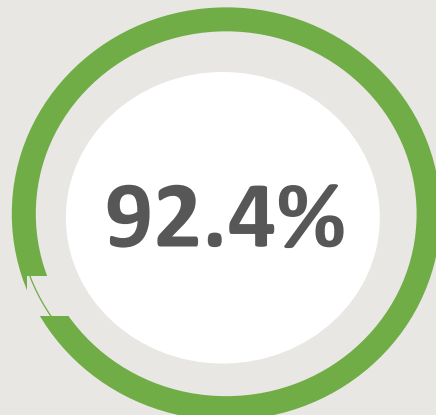
The infographics and summary of key findings on the next pages present the insights derived from the analysis of website user survey data and site analytics for all 13 participating DMO websites, and are based on website user averages, segmented by generational age:

- **Millennials**—site users age 18-36 at the time of being surveyed.
- **Gen Xers**—site users age 37 -52 at the time of being surveyed.
- **Baby Boomers** —site users age 53-70 at the time of being surveyed.

This data was calculated by averaging the analytics findings of all participating DMO websites, weighted by web traffic during the period of study.



THE AVERAGE DMO WEBSITE USER—BY GENERATION

| Average Number of Page Views | Average Session Duration | New Users |
|--|--------------------------|---|
| MILLENNIALS | | |
|   | 00:05:54 |  <div>Of Millennial website users are new users</div> |
| GEN XERS | | |
|   | 00:06:02 |  <div>Of Gen X website users are new users</div> |
| BABY BOOMERS | | |
|   | 00:06:07 |  <div>Of Baby Boomer website users are new users</div> |

THE AVERAGE DMO WEBSITE USER—BY GENERATION

Site Acquisition

Top 5 Page Types

MILLENNIALS

| | |
|-------------------------------|---------------------------|
| Organic Search (64.1%) | Paid Search (6.9%) |
| Direct (11.1%) | Referral (8.7%) |



Event Calendar
Things to Do
Things to Do—Specific
Event Calendar/Specific Event
Visitor Information

GEN XERS

| | |
|-------------------------------|----------------------------|
| Organic Search (52.2%) | Paid Search (10.8%) |
| Direct (13.3%) | Referral (9.1%) |



Event Calendar
Things to Do
Travel Guide & Newsletter Request
Itineraries/Planning
Event Calendar—Specific Event

BABY BOOMERS

| | |
|-------------------------------|---------------------------|
| Organic Search (47.7%) | Paid Search (8.8%) |
| Direct (15.8%) | Referral (8.3%) |



Event Calendar
Travel Guide & Newsletter Request
Things to Do
Visitor Information
Map Request

DMO Website Use By Generation—Key Findings

- On average, Millennials view the most number of pages on DMO websites yet spend the least amount of time on site. Time on site increases with age while average page views decreases with age.
- Baby Boomers are most apt to arrive at a DMO website directly compared to younger generations, while Millennials are comparatively more likely to arrive at a DMO website via organic search. Direct arrival at DMO websites increases with age.
- While the three generations of travelers are generally similar in the content they most commonly access on DMO websites, Millennials are more likely to view specific content pages—for example, on individual events and outdoor activities. Gen Xers are likelier than other generations to access Itineraries/Planning pages. Baby Boomers are more apt than other generations to view map content. Interest in requesting travel guides and newsletters increases with age.

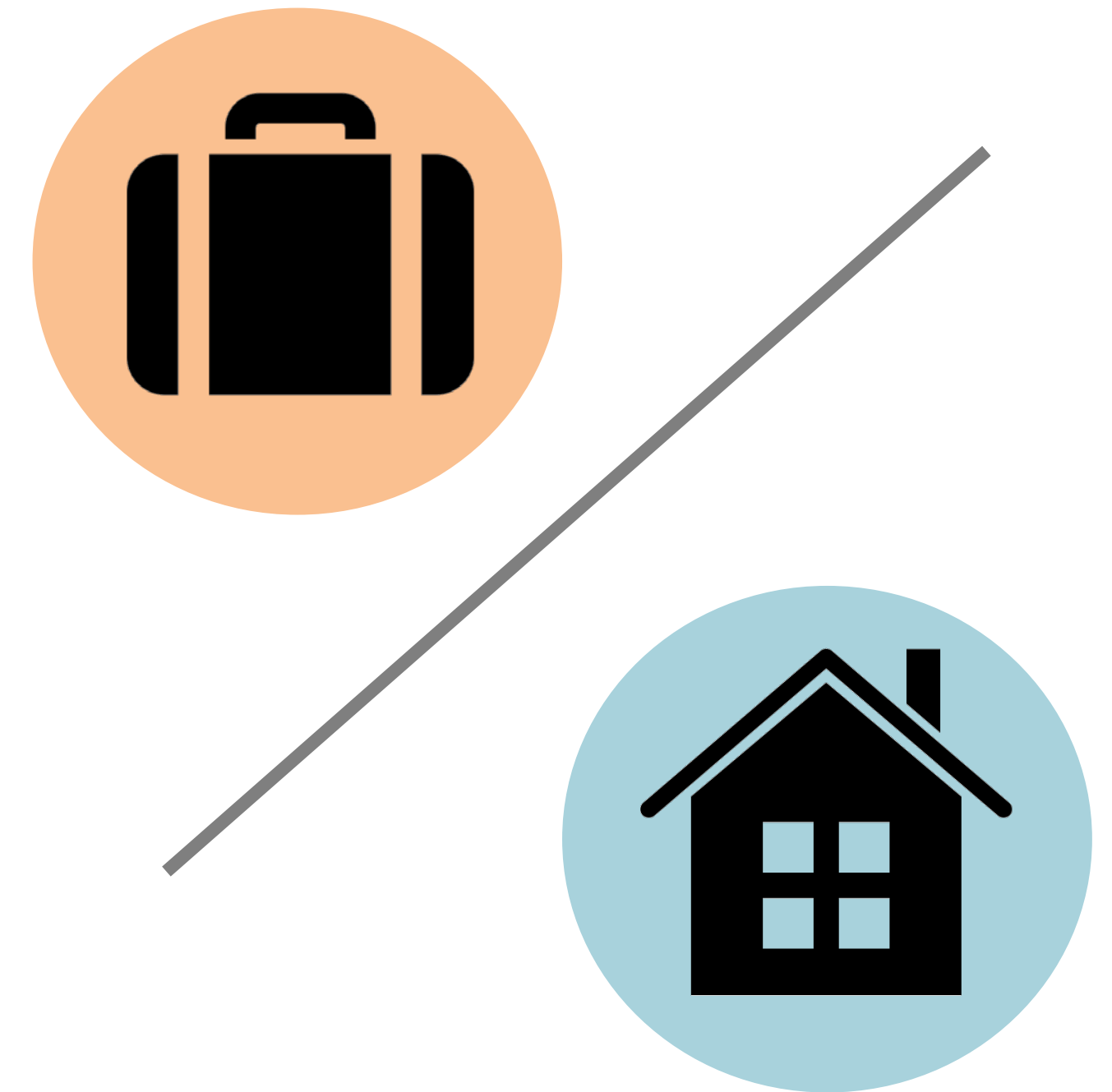
HOW DMO WEBSITES ARE USED: THE AVERAGE WEBSITE USER BY RESIDENCE

DMO Website Use By Residence

The infographics and summary of key findings on the next pages present the insights derived from the analysis of website user survey data and site analytics for all 13 participating DMO websites, and are based on website user averages, segmented by potential visitors and local residents:

- **Potential Visitors** are website users who reported using the DMO site to research or plan a trip.
- **Local Residents** are website users who reported living in the destination.

This data was calculated by averaging the analytics findings of all participating DMO websites, weighted by web traffic during the period of study.



THE AVERAGE DMO WEBSITE USER—VISITORS VS LOCALS

Average Number of Page Views

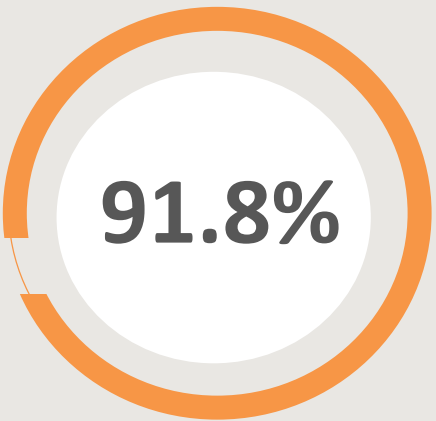
Average Session Duration

New Users

POTENTIAL VISITORS

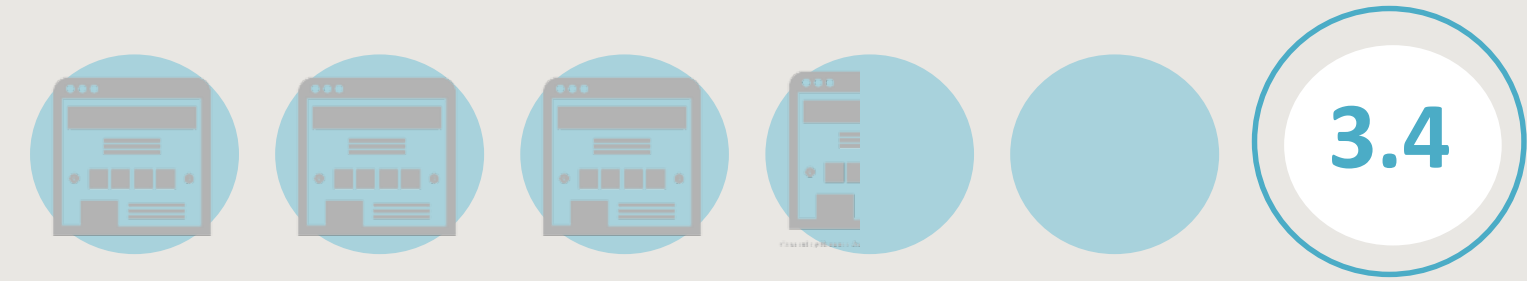


00:07:19

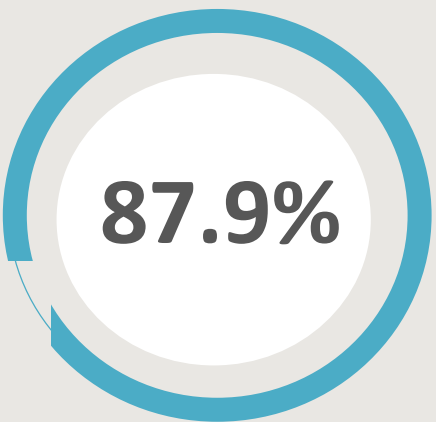


Of potential visitor users are new users

LOCAL RESIDENTS



00:13:36



Of local resident users are new users

THE AVERAGE DMO WEBSITE USER—VISITORS VS LOCALS

Site Acquisition

Top 5 Page Types

POTENTIAL VISITORS

| | |
|-------------------------------|---------------------------|
| Organic Search (53.9%) | Paid Search (9.6%) |
| Direct (12.5%) | Referral (10.9%) |



Event Calendar
Things to Do
Travel Guide & Newsletter Request
Itineraries/Planning
Map Request

LOCAL RESIDENTS

| | |
|-------------------------------|---------------------------|
| Organic Search (60.0%) | Paid Search (6.8%) |
| Direct (13.7%) | Referral (5.5%) |



Event Calendar
Things to Do
Event Calendar—Specific Event
Things to Do—Specific
Itineraries/Planning

Website Use By Residence—Key Findings

- On average, potential visitors spend less time yet view more pages on DMO websites than local residents.
- Potential visitors to the destination are more likely to be new website users compared to local residents.
- Potential visitors are more likely to arrive at a DMO website via referral and paid search compared to local residents. Local residents are more apt to arrive at the site via organic search than potential visitors.
- Local residents are more likely to access pages on the DMO website related to specific types of activities and events in the destination, driving up the views of these pages.

HOW DMO WEBSITES ARE USED: THE AVERAGE WEBSITE USER BY USER TYPE

DMO Website Use By User Type

The infographics and summary of key findings on the next pages present the insights derived from the analysis of website user survey data and site analytics for all 13 participating DMO websites, and are based on website user averages, segmented by user types, defined as:

- **Potential Visitors** are website users who reported using the DMO website to research or plan a trip.
- **Meeting Planners** are website users who identified as a meeting, event or wedding planner and reported using the DMO website for professional business reasons.
- **Journalists** are website users who identified as a journalist or writer and reported using the website for professional business reasons.

This data was calculated by averaging the analytics findings of all participating DMO websites, weighted by web traffic during the period of study.



THE AVERAGE DMO WEBSITE USER—BY USER TYPE

Key Findings

Top 5 Page Types

POTENTIAL VISITORS

Potential visitors most view the Event Calendar and Things to Do pages. They also view other pages related to travel inspiration and planning, including Travel Guide & Newsletter Request, Itineraries/Planning and Map Request pages. **DMOs can monitor pages by specific user types to make site content strategy decisions that drive target audiences to relevant pages.**



- Event Calendar
- Things to Do
- Travel Guide & Newsletter Request
- Itineraries/Planning
- Map Request

MEETING PLANNERS

Similar to potential visitors, meeting planners who use DMO websites most view pages related to Events and Things to Do. While all participating DMO websites include a dedicated section on meetings and/or groups, pages within these dedicated sections were far less viewed by meeting planners than the Events and Things to Do pages. **Meeting planners typically view pages that potential visitors also view, which can guide content strategy decisions.**



- Event Calendar
- Things to Do
- Weddings
- Dining
- Event Calendar/Specific Event

JOURNALISTS

Like potential visitors and meeting planners, journalists who use DMO websites commonly view pages related to Events. On average, journalists also view Places to Stay, General Destination Information and Itineraries/Planning pages. **DMOs can monitor content usage by journalists to determine correlations to content published in earned media and written articles.**



- Event Calendar
- Places to Stay
- Event Calendar/Specific Event
- General Destination Information
- Itineraries/Planning

THE ECONOMIC IMPACT OF DMO WEBSITES

Economic Impact

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

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



Economic Impact (continued)

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

- Visitors on **incremental trips** had not fully made up their mind to visit the destination when they came to the participating DMO website and stated that the website influenced their decision to ultimately visit the destination. 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.
- Website visitors who **extended their stay** can be leisure travelers, business travelers or convention/meeting attendees. Leisure travelers who did not state that the website influenced their decision to visit the destination, 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 the destination. 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 are calculated:



Website ROI Estimates—Quick Facts Summary

The profile at right shows a summary of fundamental ROI findings and descriptive statistics that emerged from this research. These findings are based on 8,845,291 real, new website users of all 13 participating DMO websites between January 1, 2016 and January 1, 2017.

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

| | |
|--|--------------------|
| Incremental Trips Generated in 2016 by 13 Participating DMO Websites Studied | 304,425 Trips |
| Total Visitor Spending on these Incremental Trips | \$270,486,531 |
| Additional Trip Days in 2016 from Trips Extended by 13 Participating DMO Websites Studied | 146,690 Days |
| Total Visitor Spending on Additional Trip Days from Trips Extended | \$54,278,815 |
| Total Economic Impact from Visitor Spending Generated in 2016 by 13 Participating DMO Websites Studied | \$324,765,346 |
| Average Visitor Spending Economic Impact Generated Per Real, New DMO Website User | \$36.72 |
| Incremental Roomnights Generated in 2016 by 13 Participating DMO Websites Studied | 533,182 Roomnights |

Economic Impact Key Findings

The key ROI findings of the study are summarized following.

- **Incremental trips generated by the 13 participating DMO websites studied:** For 8,845,291 real, new users of the 13 DMO websites during 2016, an estimated 304,425 incremental trips were generated for the respective destinations. An incremental trip is one in which the user decided to visit the destination based on their experience with the DMO website. These are trips to the destination that would not have happened if the website did not exist, and thus any visitor spending in the destination on these trips can be counted as part of the website's economic impact. The average incremental trip lasted 2.9 days, with a reported in-market spending of \$306.38 per day for each visitor and their immediate party. These incremental trips are estimated to have generated \$270,486,531 in new visitor spending in these destinations.
- **Additional days on trips extended generated by the 13 participating DMO websites studied:** A second way DMO websites can generate economic value is by inspiring visitors to extend their stays. The research conducted shows that for 8,845,291 real, new users of these 13 sites, 146,690 new visitor days were generated for the respective destinations. This is estimated to have resulted in an additional \$54,278,815 in incremental visitor spending in these destinations.
- **Total estimated economic impact of the 13 participating DMO websites studied:** The two components discussed above (spending on incremental trips and additional days in-market) comprise the program's economic impact as defined in this study. It is estimated that for 8,845,291 real, new users of the 13 participating DMO websites, \$324,765,346 in economic impact was generated for the respective destinations. Alternatively, every real, new website user to a DMO site results in \$36.72 in incremental visitor spending in the destination on average.
- **Incremental hotel room nights generated by the 13 participating DMO websites studied:** Given the number and length of incremental and extended trips generated by the DMO websites, and the proportion of these visitors reporting that they stayed in a hotel in the destination, it is estimated that for 8,845,291 real, new visitors to the 13 websites during the 12-month period of study, 533,182 incremental roomnights were generated in the respective destinations' hotels.

Comparative Findings By DMO

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

| Destination* | 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 | Roomnights generated (per 1,000 real, new users) |
|---|---|-------------------------------|---|---|---|---|--|---|--|
| Destination A | 39 | 2.9 | \$302.64 | \$34,298 | 13 | \$4,067 | \$38,365 | \$38.37 | 47.2 |
| Destination B | 61 | 2.1 | \$213.91 | \$27,263 | 11 | \$2,334 | \$29,597 | \$29.60 | 48.5 |
| Destination C | 84 | 2.2 | \$277.04 | \$51,296 | 4 | \$1,167 | \$52,463 | \$52.46 | 62.9 |
| Destination D | 36 | 3.7 | \$330.12 | \$43,982 | 10 | \$3,451 | \$47,433 | \$47.43 | 56.9 |
| Destination E | 22 | 3.3 | \$333.11 | \$24,121 | 7 | \$2,353 | \$26,474 | \$26.47 | 40.4 |
| Destination F | 56 | 2.5 | \$300.90 | \$42,201 | 9 | \$2,660 | \$44,861 | \$44.86 | 62.4 |
| Destination G | 42 | 3.3 | \$320.66 | \$45,140 | 10 | \$3,200 | \$48,340 | \$48.34 | 112.0 |
| Destination H | 29 | 3.0 | \$343.29 | \$30,203 | 10 | \$3,369 | \$33,572 | \$33.57 | 41.8 |
| Destination I | 37 | 2.8 | \$250.98 | \$25,637 | 3 | \$775 | \$26,412 | \$26.41 | 21.5 |
| Destination J | 25 | 2.7 | \$331.54 | \$22,004 | 6 | \$2,143 | \$24,148 | \$24.15 | 30.3 |
| Destination K | 33 | 3.1 | \$326.67 | \$32,970 | 11 | \$3,896 | \$36,866 | \$36.87 | 67.3 |
| Destination L | 19 | 2.9 | \$395.72 | \$21,971 | 26 | \$10,093 | \$32,063 | \$32.06 | 60.9 |
| Destination M | 7 | 5.6 | \$404.50 | \$15,547 | 6 | \$2,229 | \$17,776 | \$17.78 | 22.6 |
| Average for all destinations | 40 | 2.9 | \$306.38 | \$33,424 | 10 | \$3,292 | \$36,716 | \$36.72 | 54.3 |
| Average for all smaller cities/boutique destinations | 43 | 2.9 | \$300.42 | \$34,615 | 8 | \$2,552 | \$37,167 | \$37.17 | 52.4 |
| Average for all major cities | 26 | 3.0 | \$361.19 | \$27,470 | 18 | \$6,994 | \$34,465 | \$34.46 | 64.1 |

For More Information



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