

THE IMPACT OF DMO WEBSITES

DMO Website
User & Conversion Study



Research conducted for the DMA West Education & Research Foundation by Destination Analysts, Inc.

miles
PARTNERSHIP

DMAwest
destination marketing association of the west
education & research foundation

With You Today



Erin Francis-Cummings
President & CEO



Kimberly Vince-Cruz
Senior Director of Research



David Reichbach
Director of Analytics & Data Security

Agenda

- Travelers' Relationship to DMO Websites
- Research Overview & Methodology
- Who Uses DMO Websites
- How DMO Websites are Used
- Influence of DMO Websites
- Economic Impact



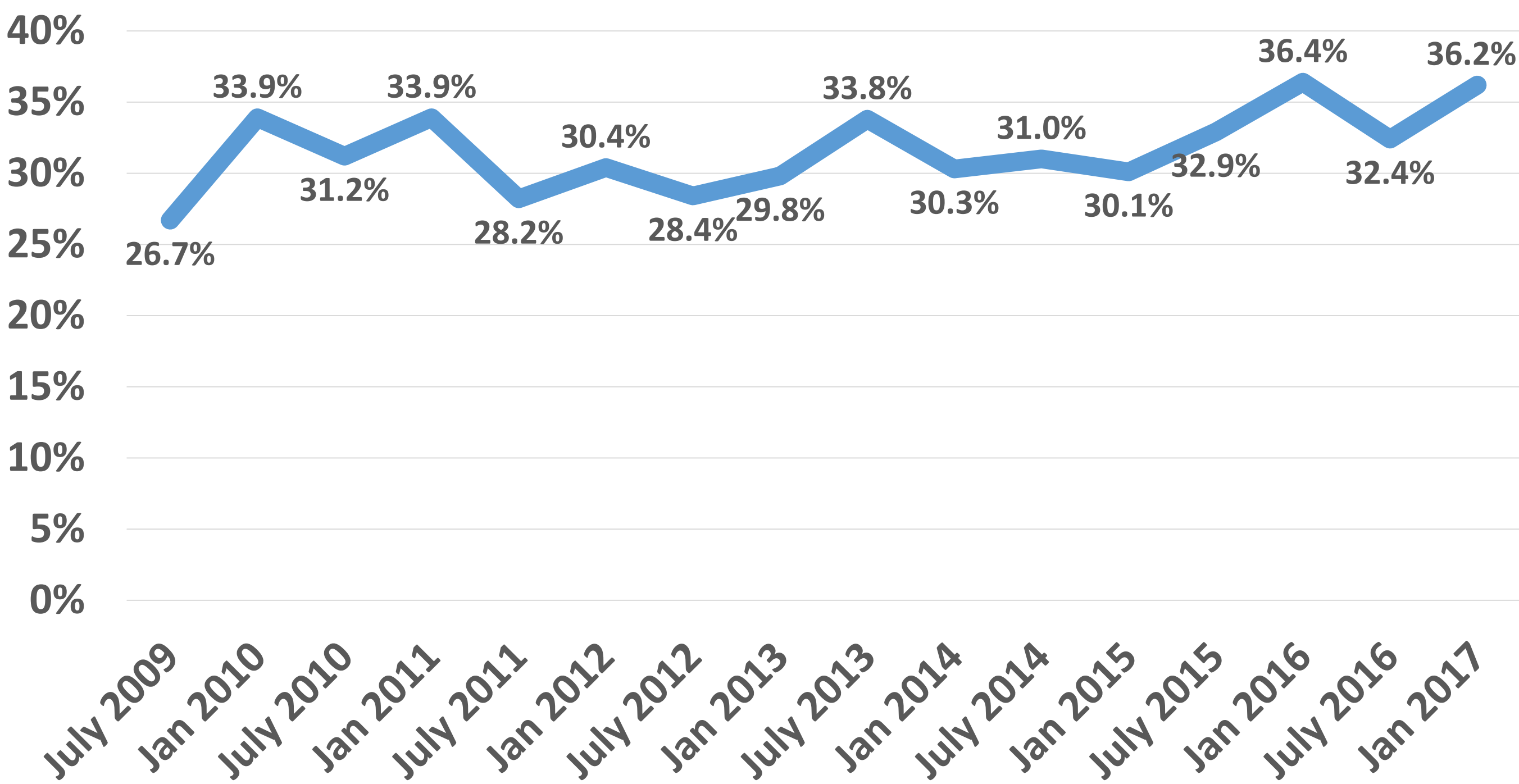
BACKGROUND: TRAVELERS' RELATIONSHIP TO DMO WEBSITES



36.2%

Background: Travelers' Use of DMO Websites

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

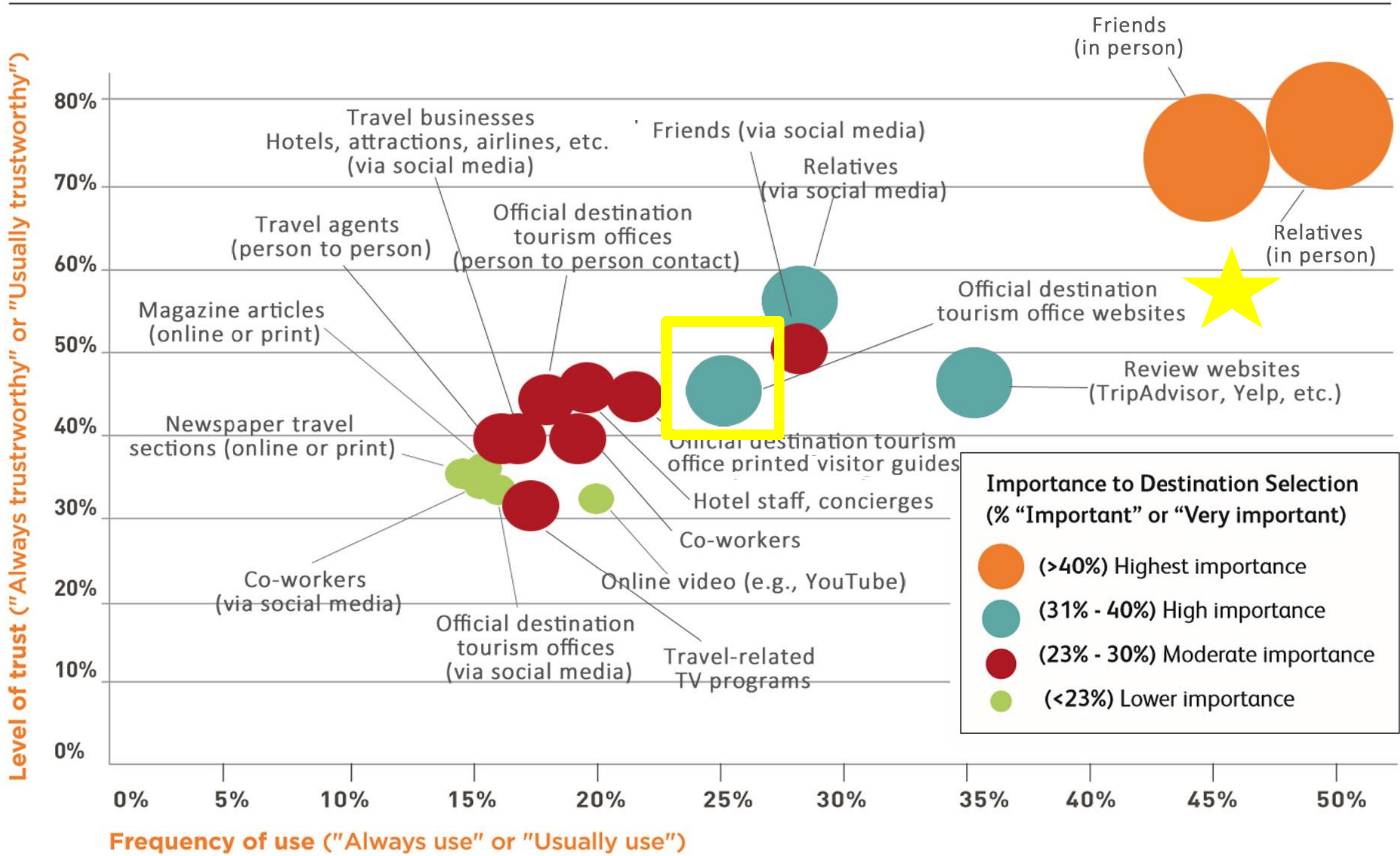


*Source: Destination Analysts' [The State of the American Traveler™](#), a quarterly national survey of 2,000+ American leisure travelers

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




*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



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



"All the information as far as what I needed to know - the neighborhoods, the events that are happening - it's all there. All the activities that interested me were on the website. I can't tell you how important the website was."

"The website did such a great job of making it easy to understand the destination."

"I really like having a list of things to do, a map and having a plan. Without these kinds of websites, I can't have a plan."

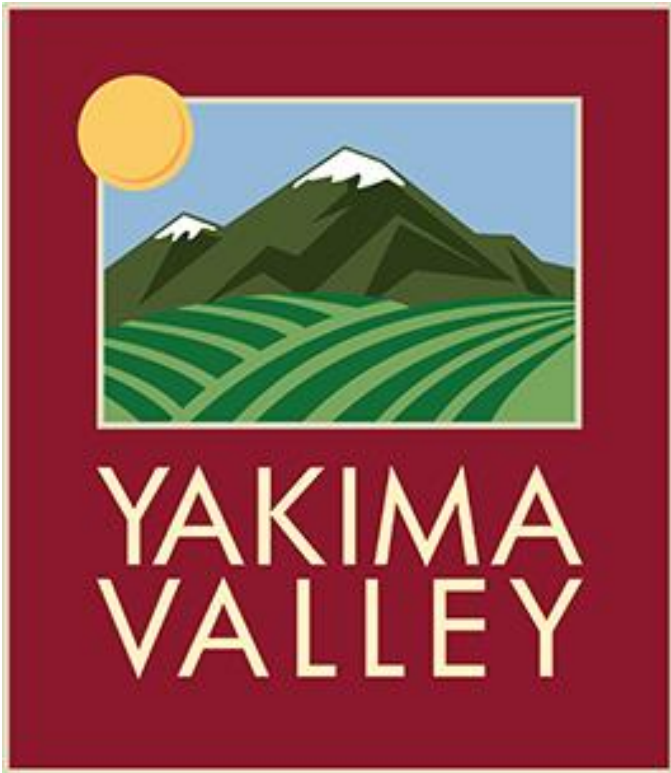
"Having an official destination website is very important. I like to know as much as I can - events going on and walking tours. They can save you a lot of time and money if you know where to look."



DMO WEBSITE USER & CONVERSION STUDY: RESEARCH OVERVIEW & METHODOLOGY

Research Overview

Thank you:

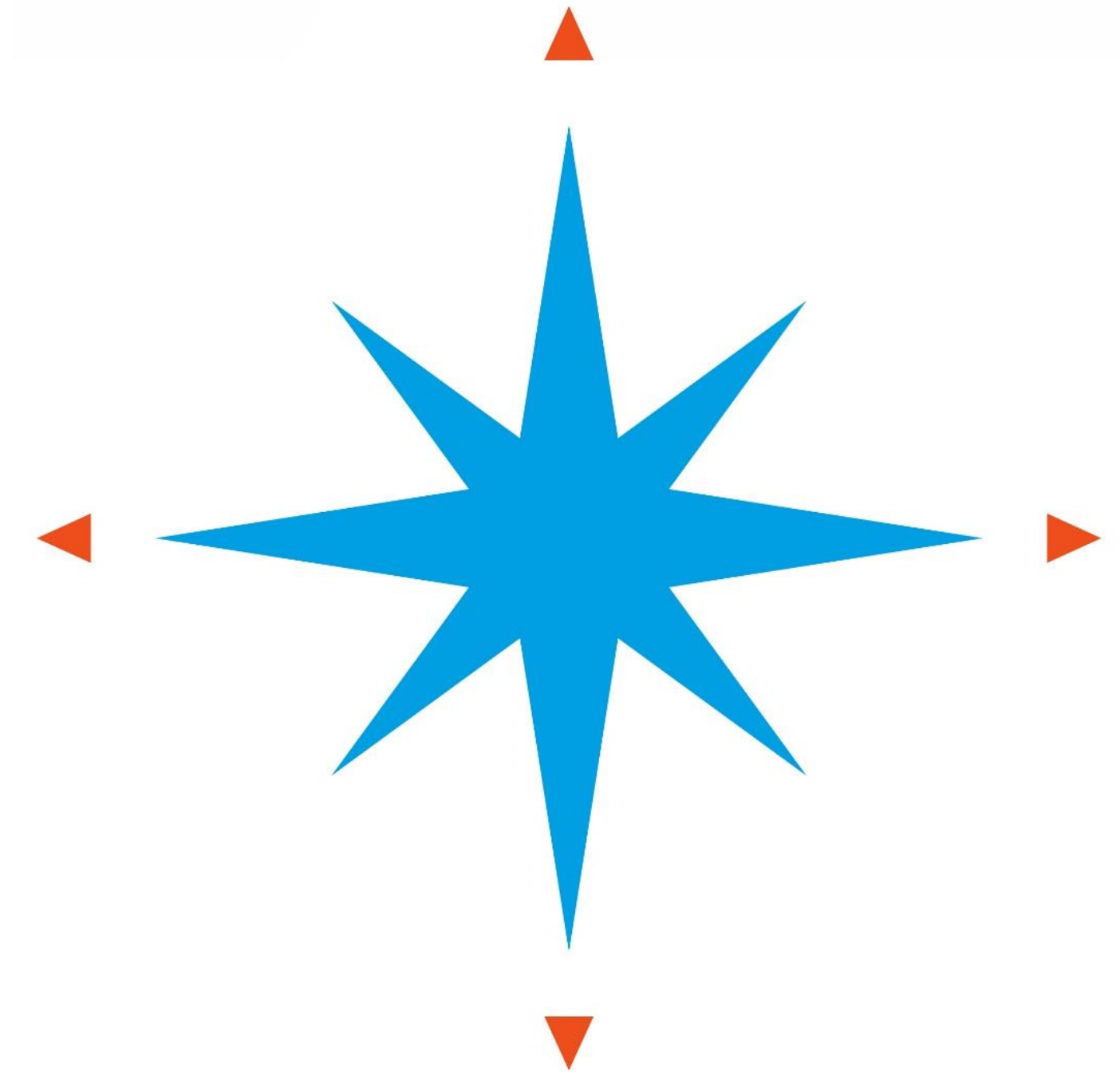


Above: Logos of participating DMA West member DMO's.

Research Objectives

This research was designed primarily to:

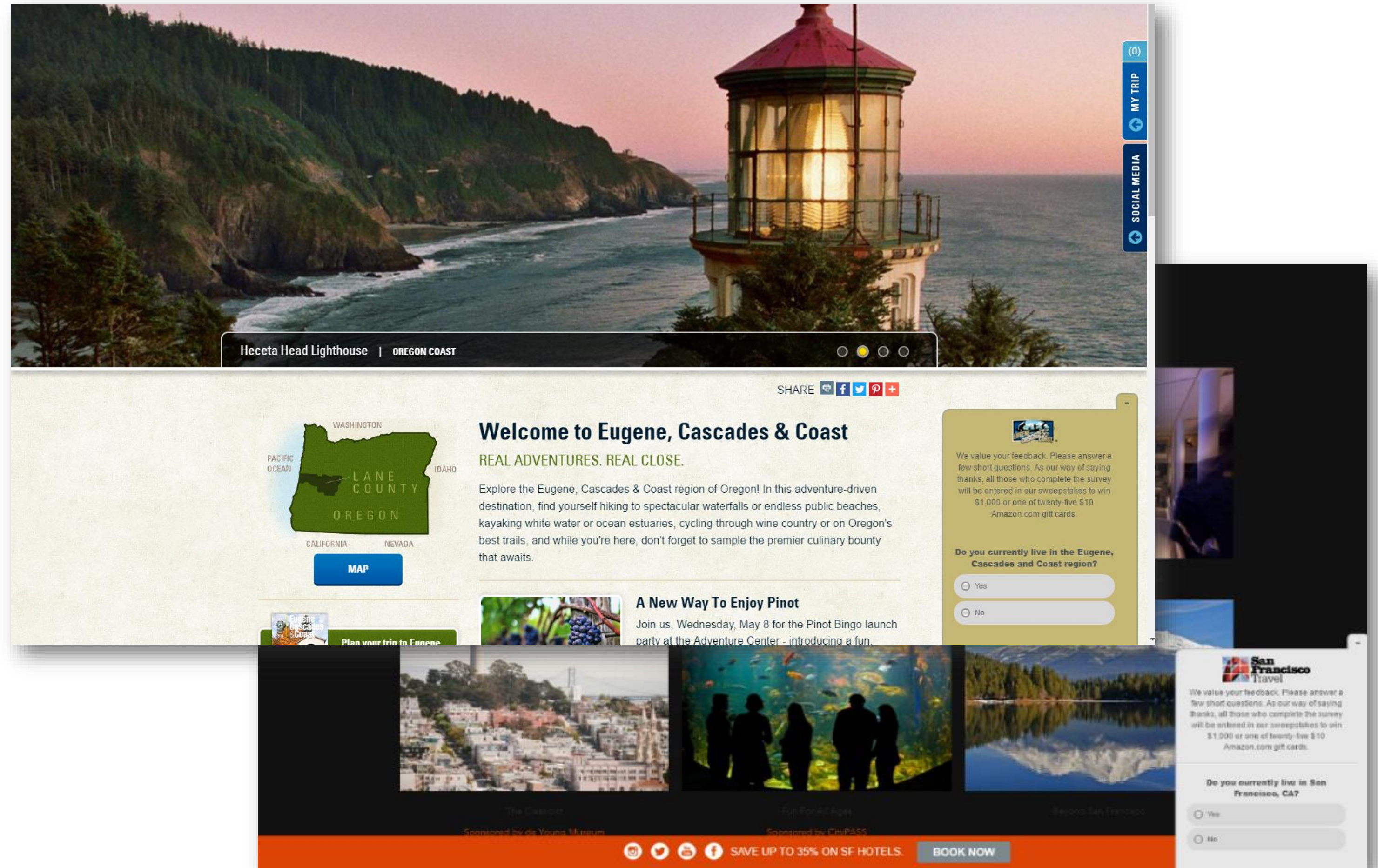
- **Determine the Visitor Spending Impact and ROI DMO Websites Produce for their Communities**
- **Develop Profiles of DMO Website Users**
- **Use the Voice of the User to Produce More In-Depth Performance Metrics for DMO Websites**



Methodology

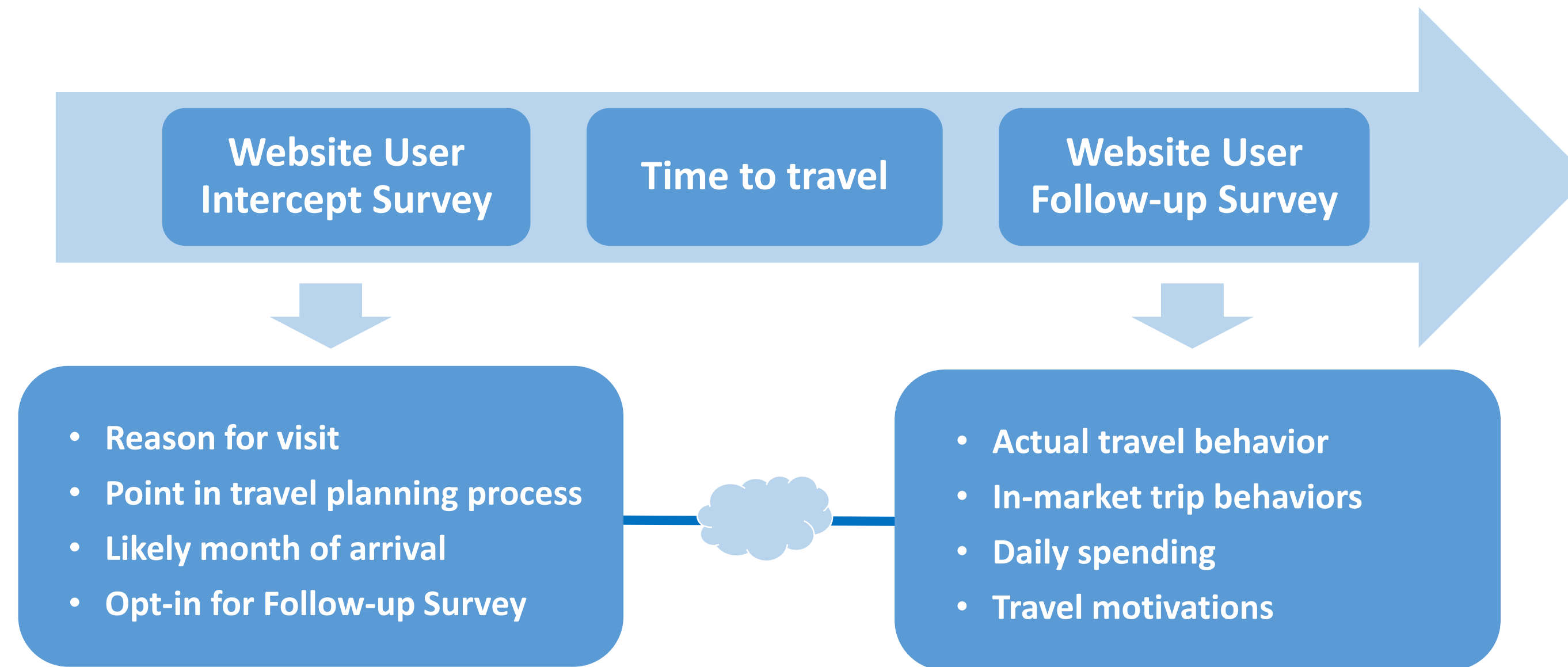
Dual Survey Approach

- Website User Intercept Survey
- Website User Follow-Up Survey



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

Methodology



Methodology



Google Analytics

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



USER SURVEY

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

Economic Impact

What we measure

- Direct visitor spending in the destination that is generated by the website
- Visitor spending in the destination that would not have occurred in the absence of the website

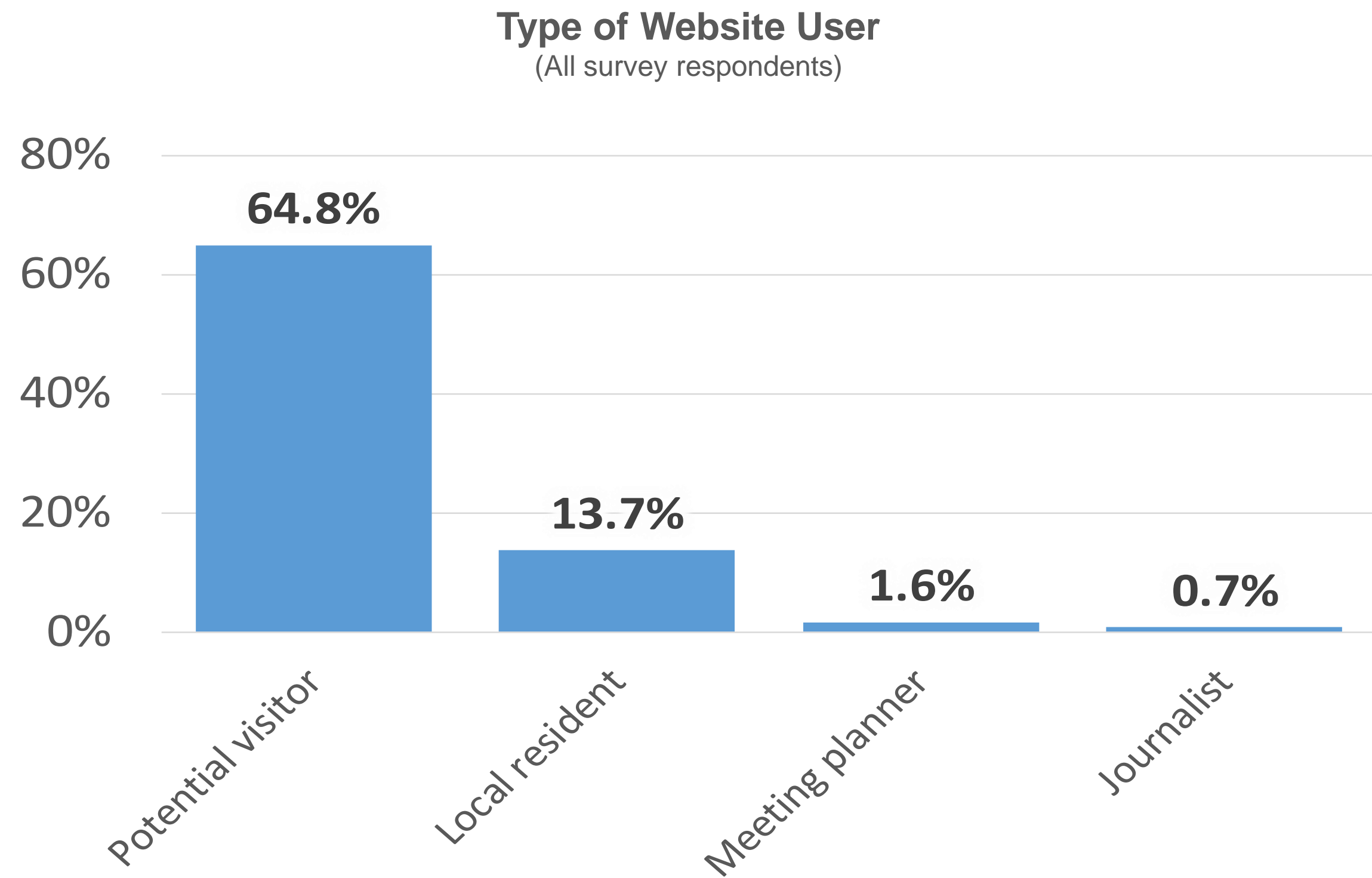


DMO Website Users Surveyed

379,966

WHO USES DMO WEBSITES

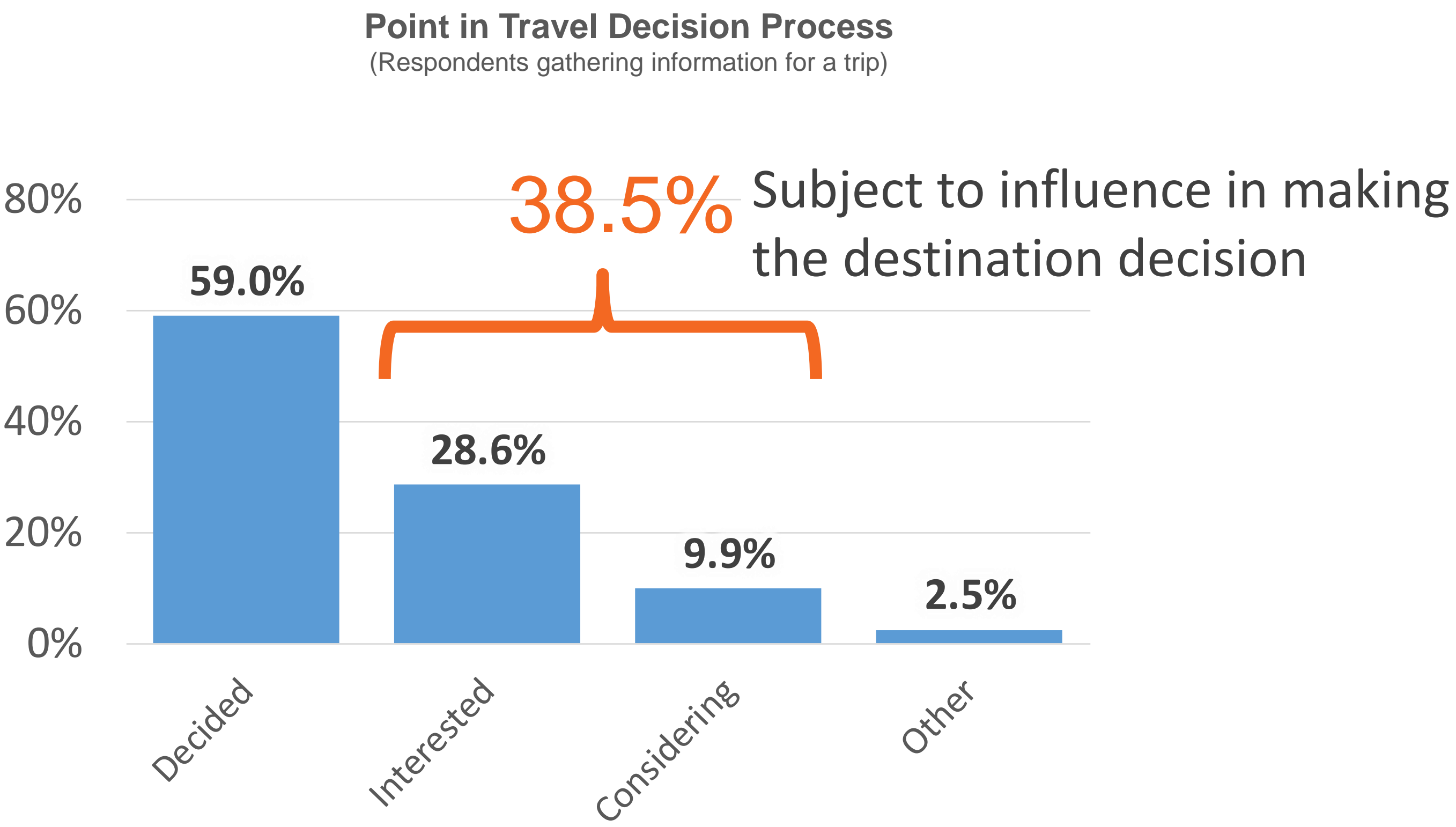
Types of DMO Website Users



Question: Which of the following best describes you?

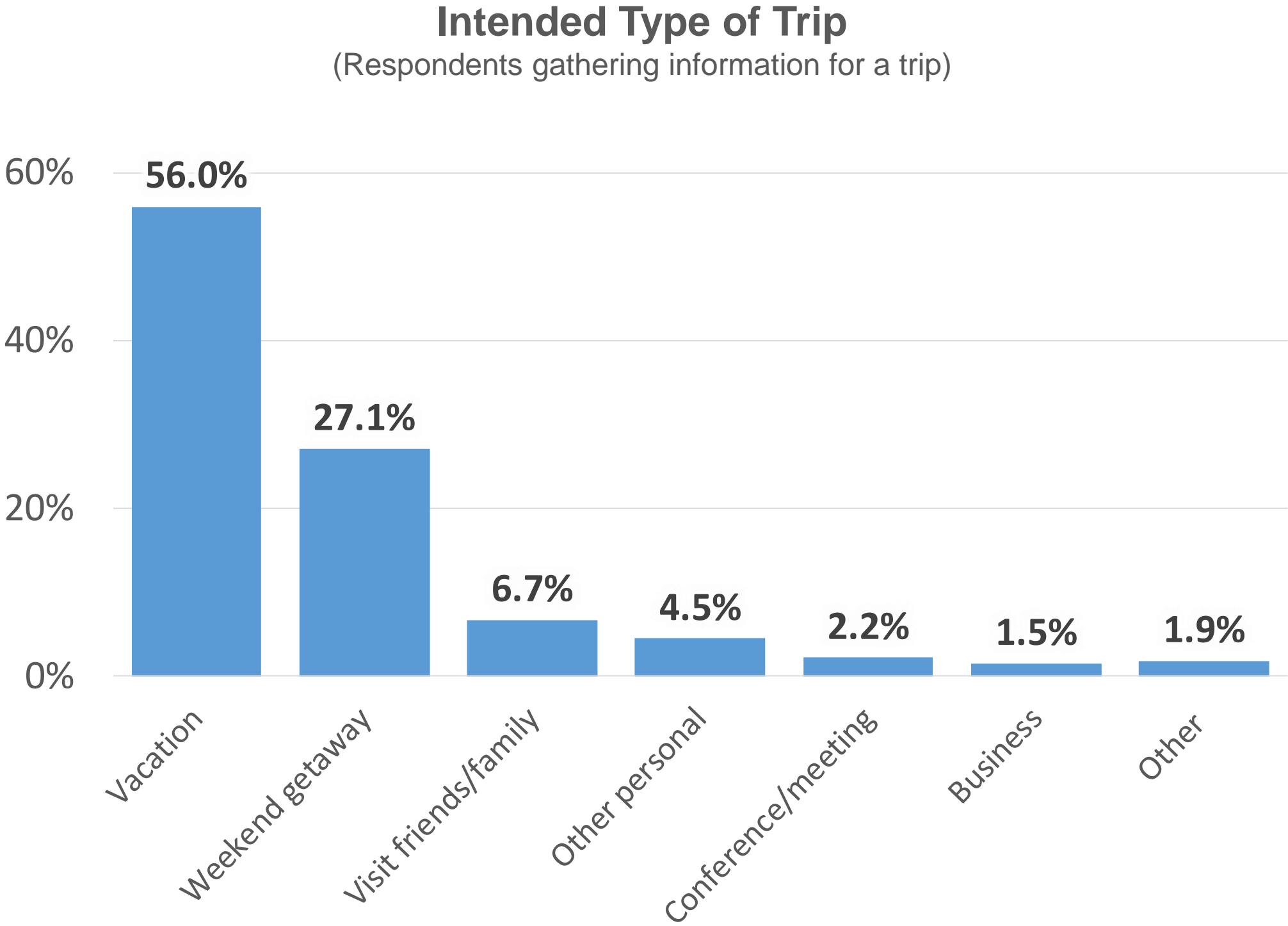
Base: All survey respondents. 379,966 completed surveys.

Point in Travel Decision Process



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.

Intended 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.

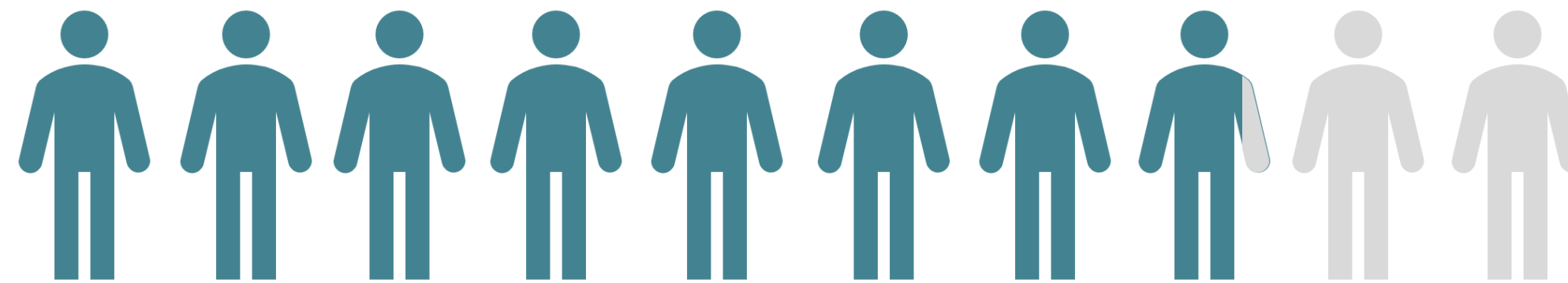
Intended Trip Length
(Respondents gathering information for a trip)



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)

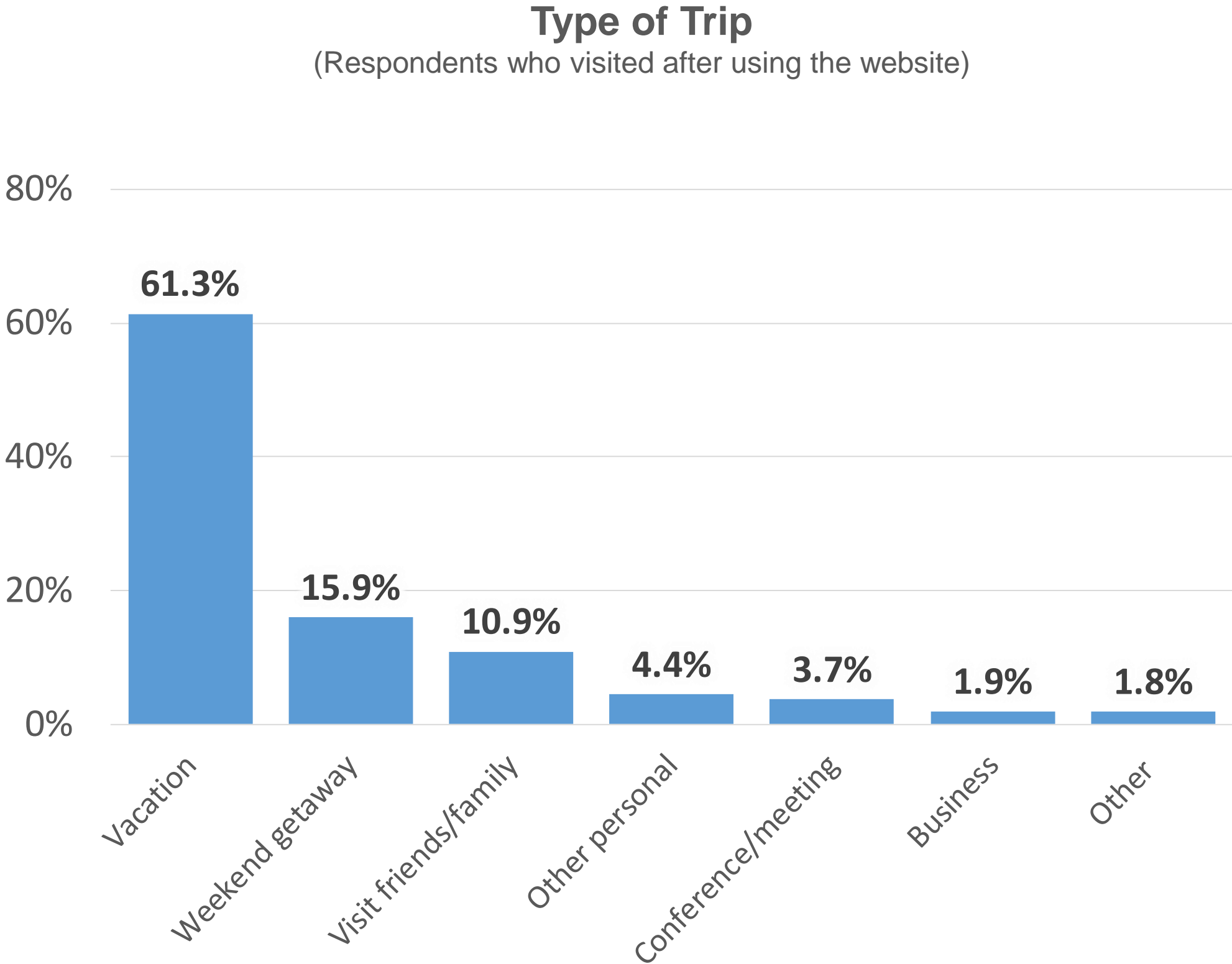


78.0% of site users who were potential visitors visited the destination after using the DMO website

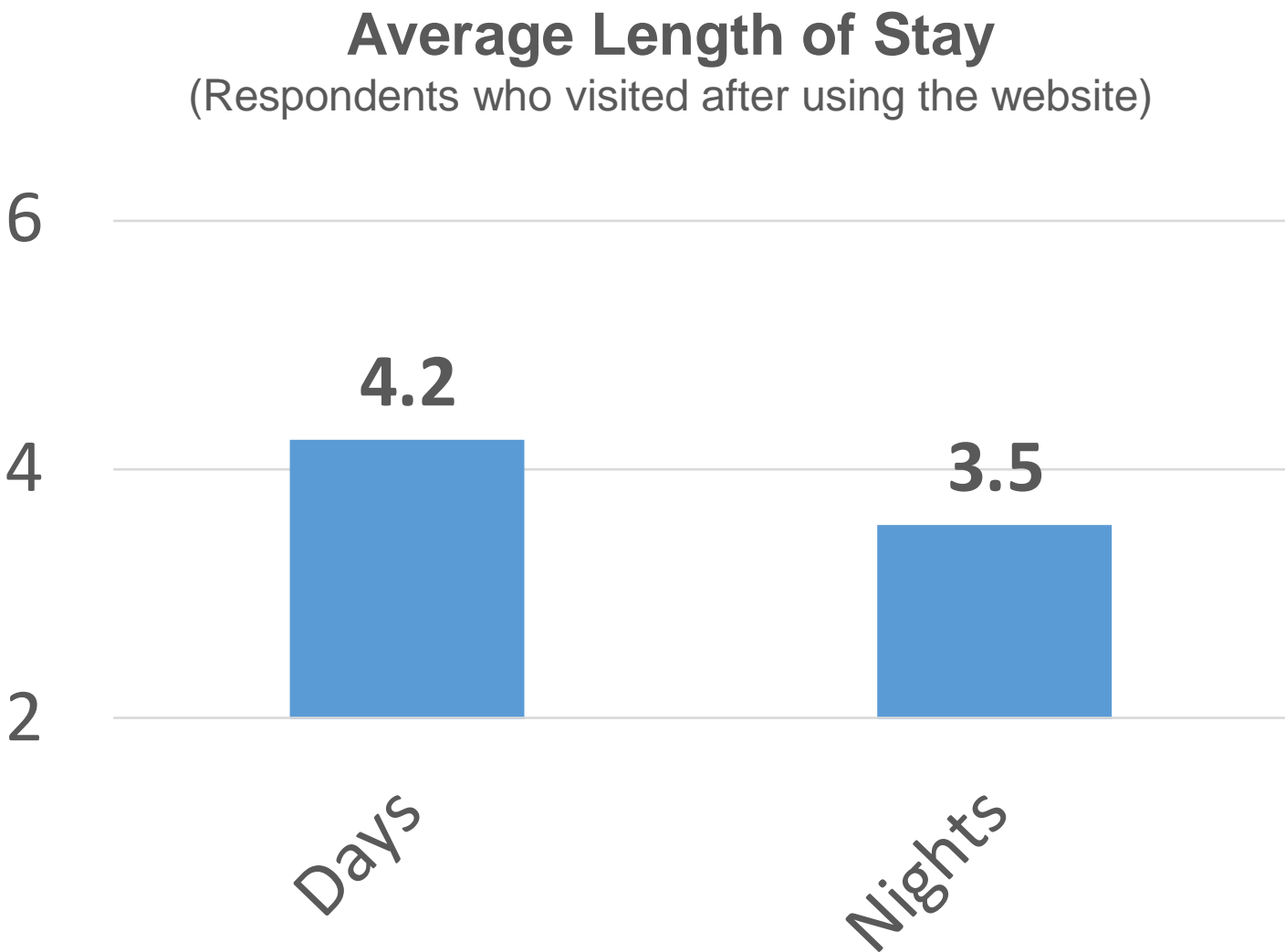
Question: Since visiting our website, have you visited [Destination]?

Base: All follow-up survey respondents. 21,475 completed surveys.

Visiting DMO Website Users—Trip Profile



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.

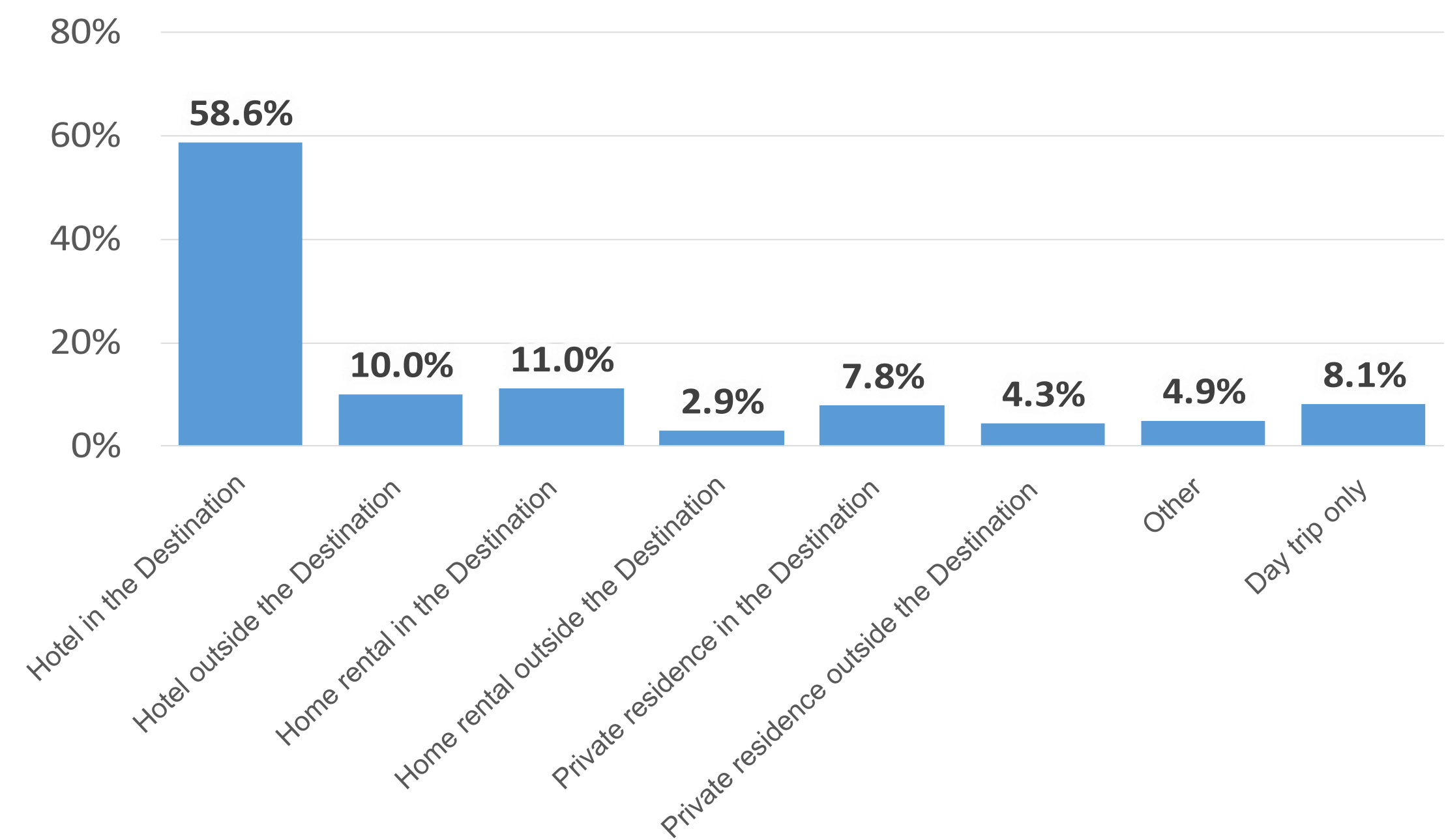


Question: How many total days and nights did you spend in [Destination] on this trip?
Base: Respondents who visited after using the website. 16,756 completed surveys.

Visiting DMO Website Users—Trip Detail

Place of Stay

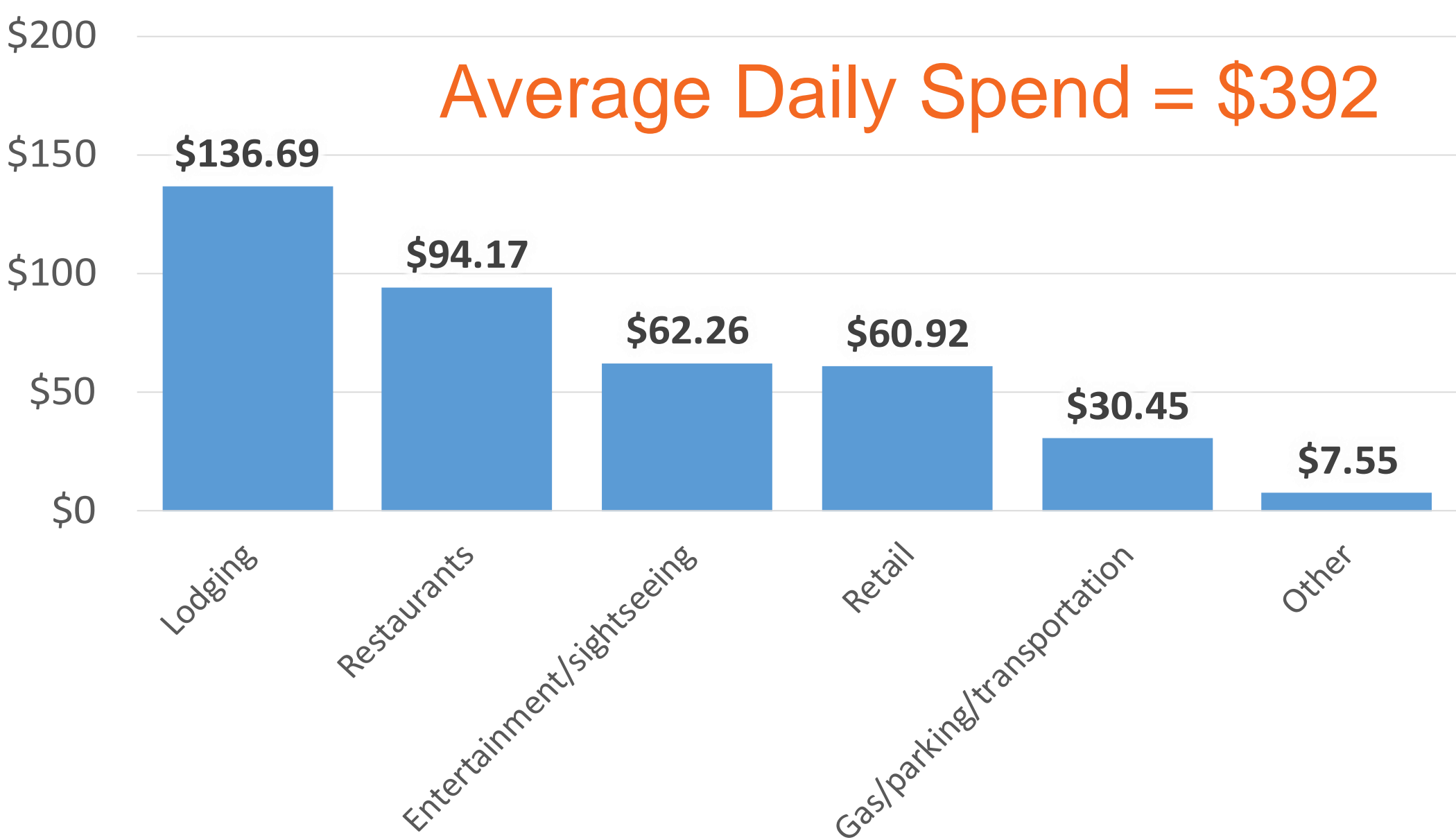
(Respondents who visited after using the website)



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.

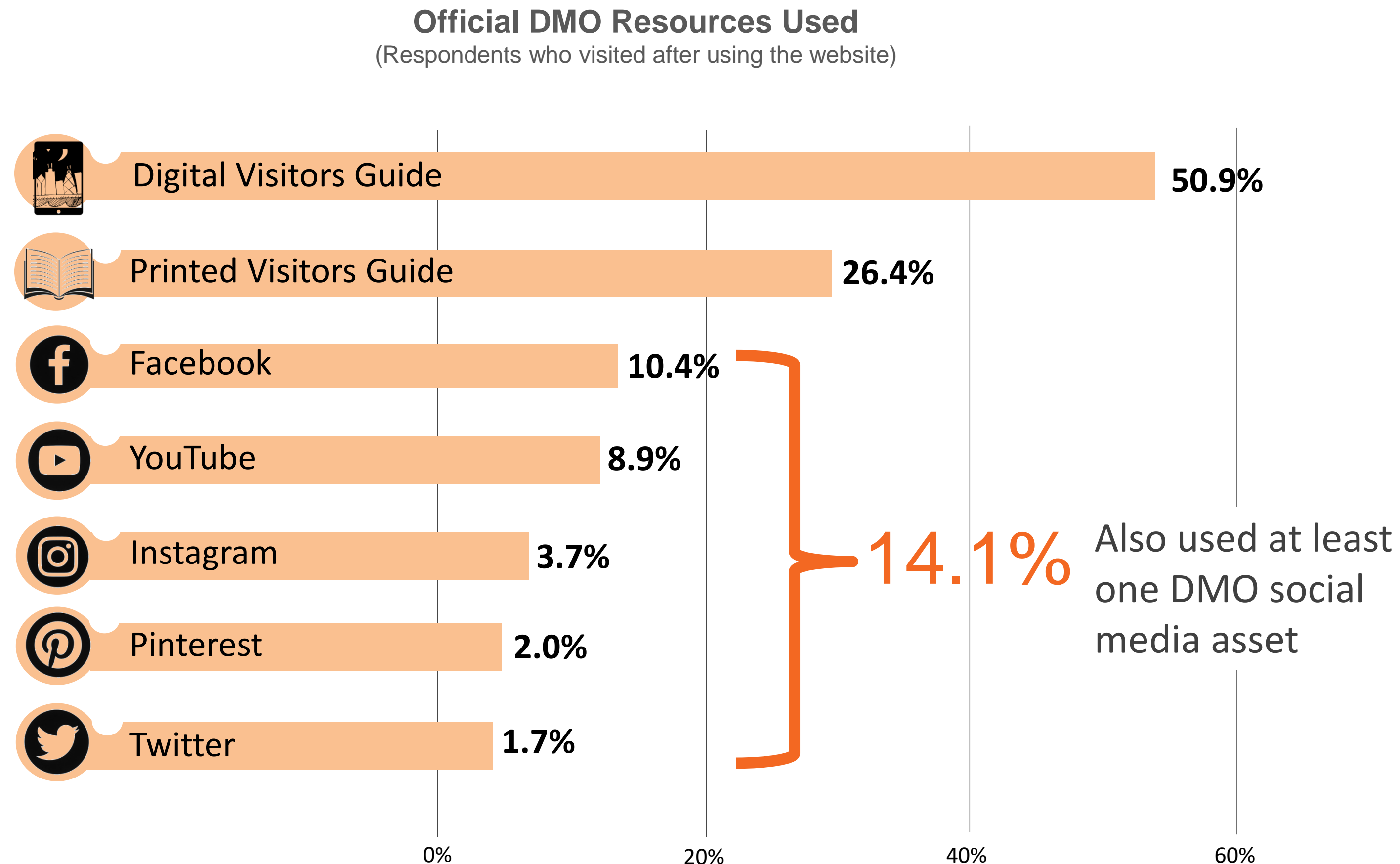
Spending Per Travel Party, Per Day

(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.

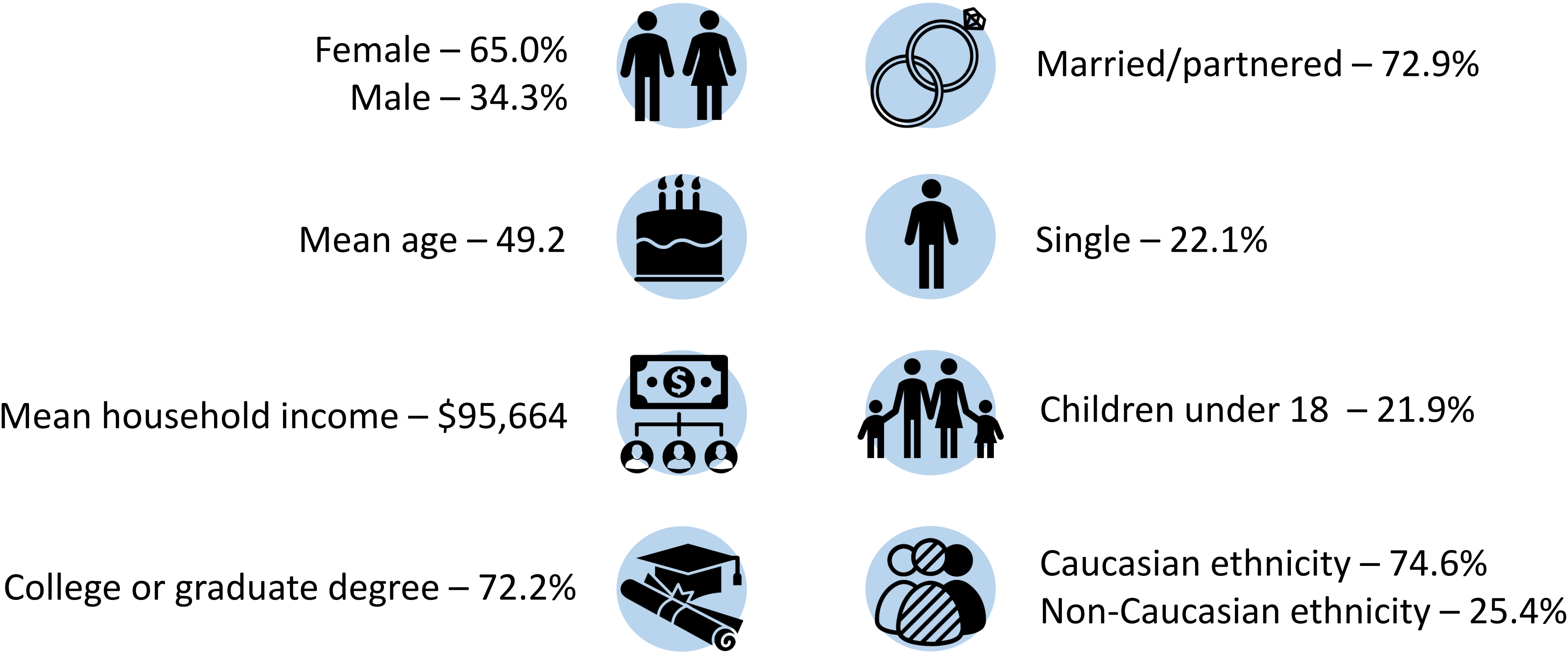
Visiting DMO Website Users—Other DMO Resources Used



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



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

How DMO WEBSITES ARE USED

DMO WEBSITE USE BY TRAVEL PLANNING STAGE



DMO WEBSITE USE—BY TRAVEL PLANNING STAGE

Average Number of Page Views

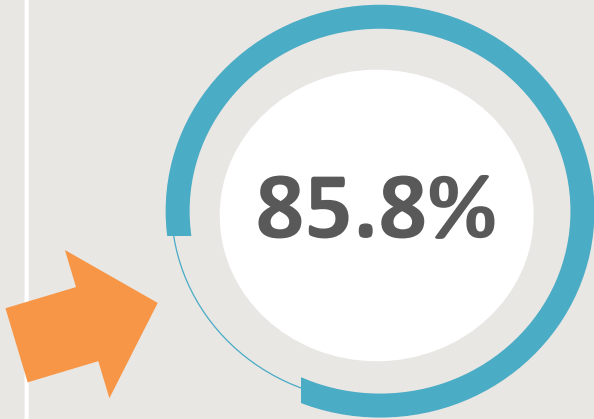
Average Session Duration

Percent of New Users

DECIDED



00:09:10

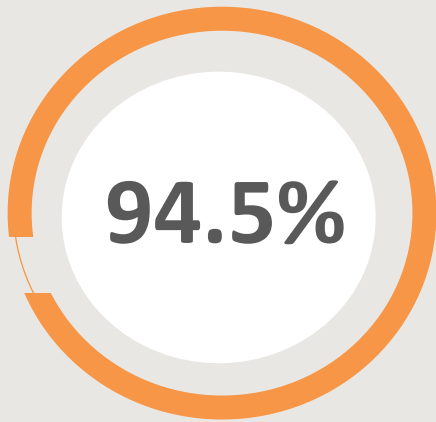


Of potential visitors who already decided to visit are new users

INTERESTED



00:08:24

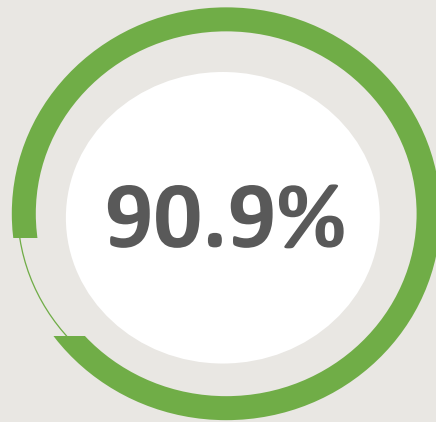


Of potential visitors who are interested in visiting are new users

CONSIDERING



00:07:15



Of potential visitors who are considering travel destinations are new users

DMO WEBSITE USE—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 GENERATION



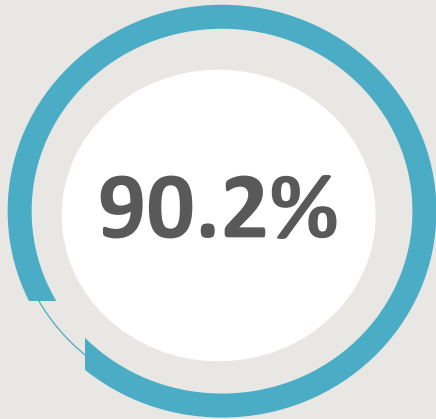
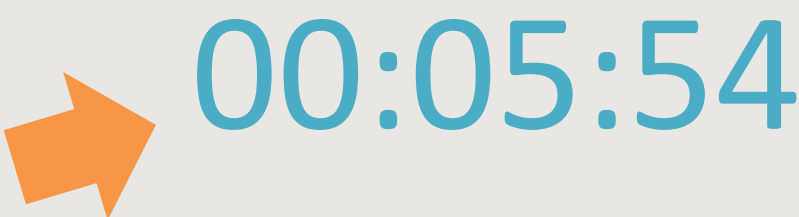
DMO WEBSITE USE—BY GENERATION

Average Number of Page Views

Average Session Duration

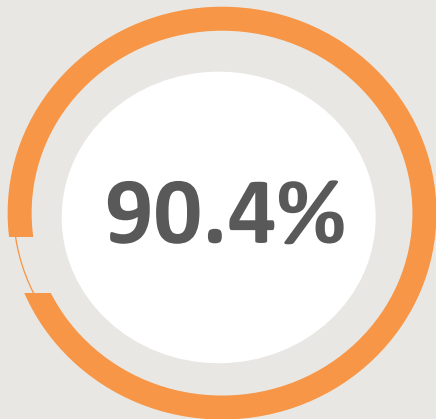
New Users

MILLENNIALS



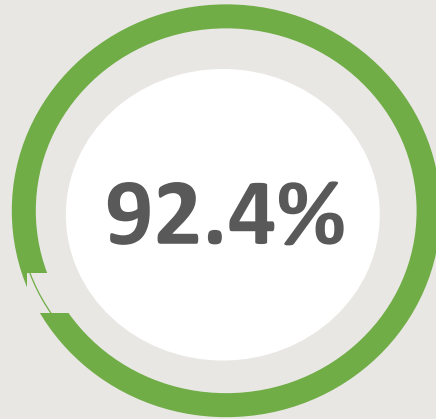
Of Millennial website users are new users

GEN XERS



Of Gen X website users are new users

BABY BOOMERS




Of Baby Boomer website users are new users

DMO WEBSITE USE—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

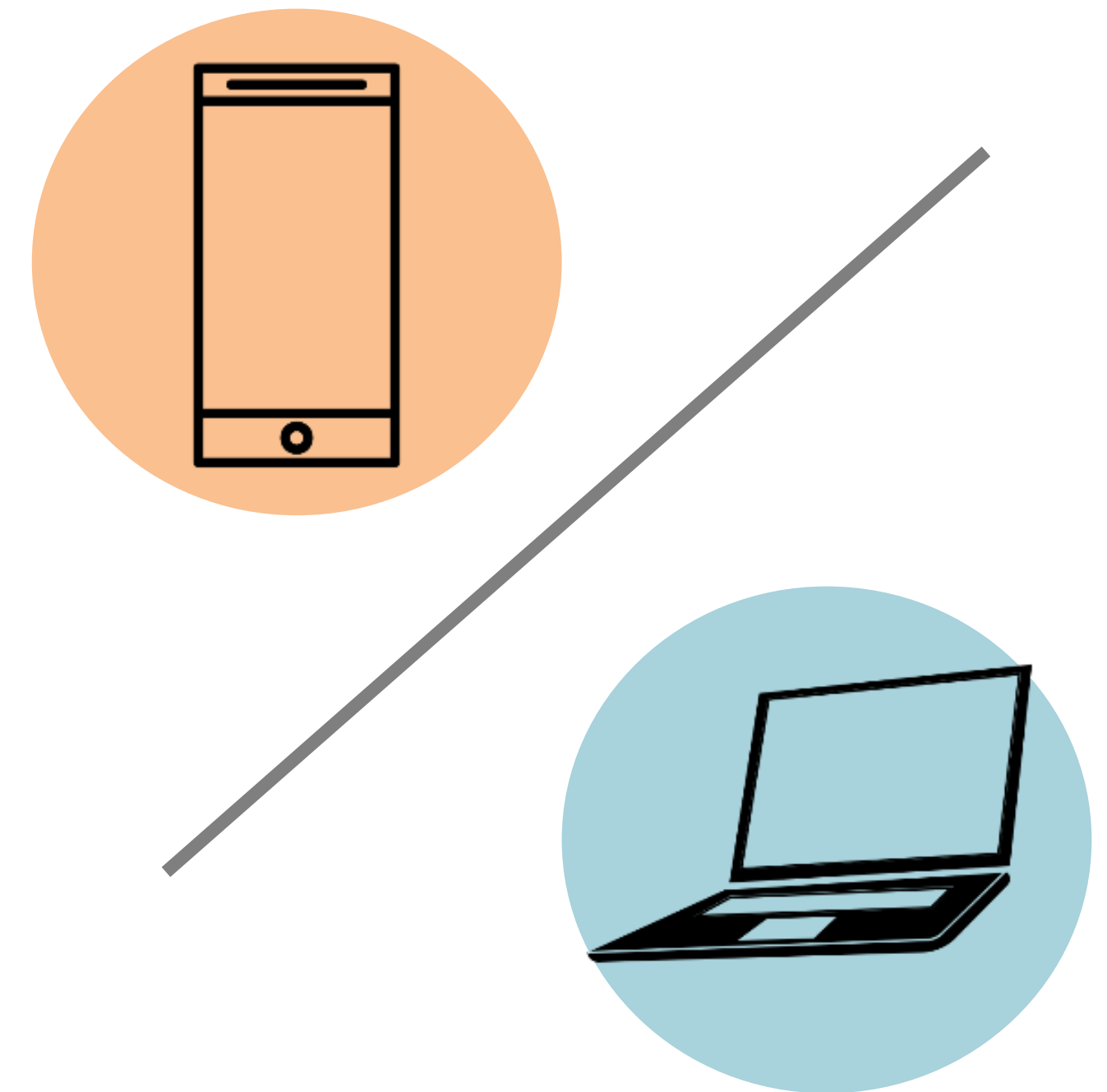


Organic Search (47.7%)	Paid Search (8.8%)
Direct (15.8%)	Referral (8.3%)



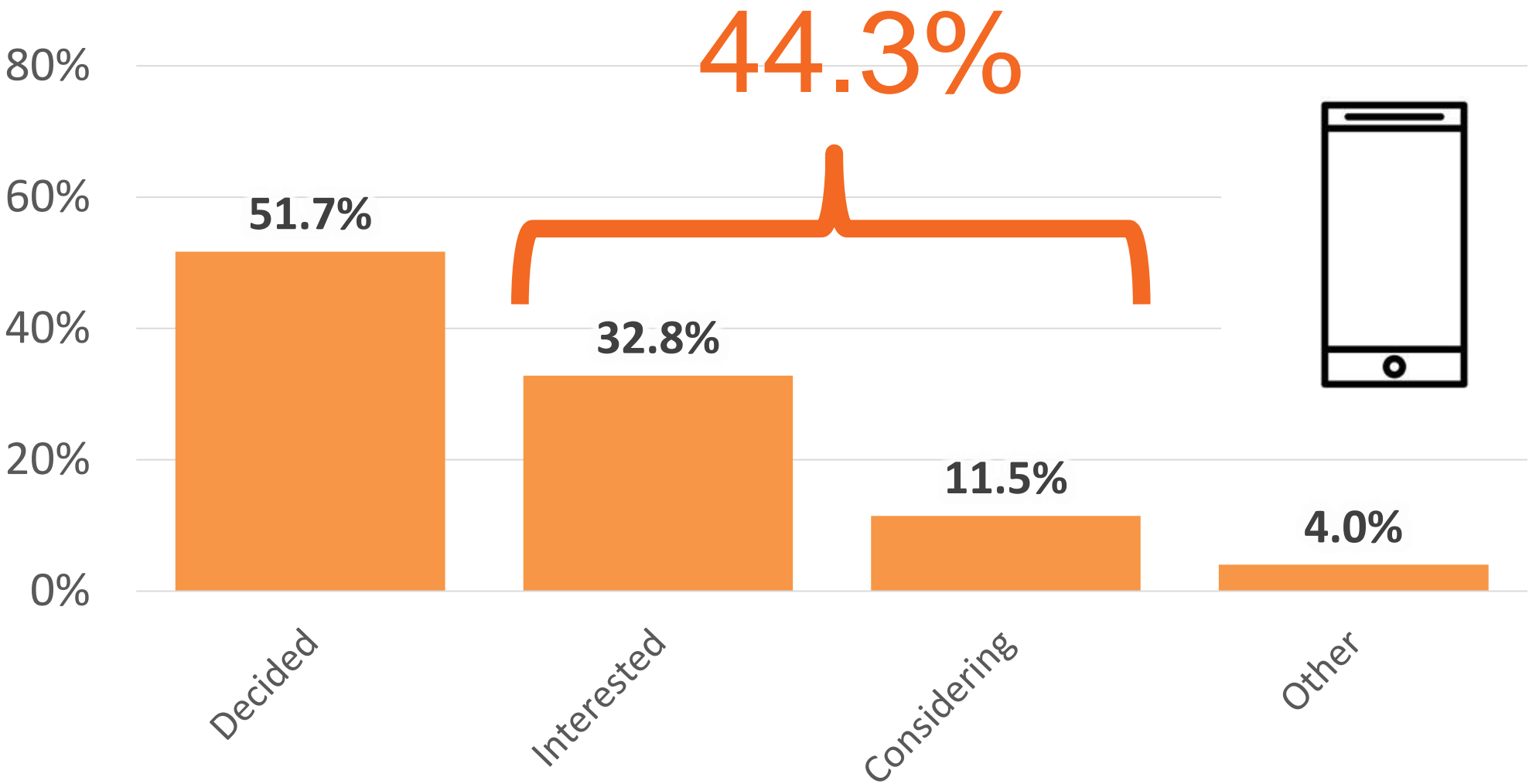
- Event Calendar
 - Travel Guide & Newsletter Request
 - Things to Do
 - Visitor Information
 - Map Request
- 

DMO WEBSITE USE BY DEVICE TYPE

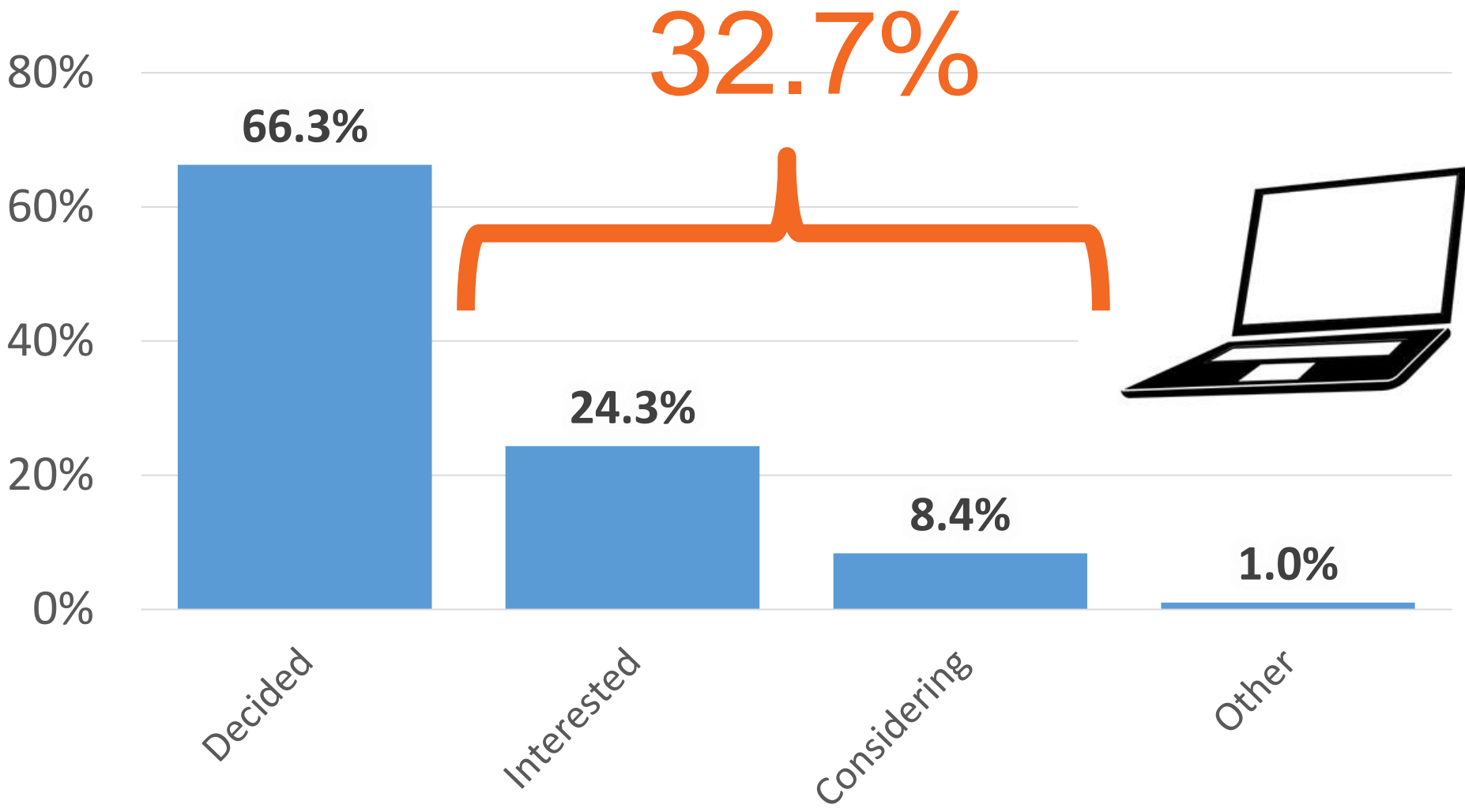


Point in Travel Decision Process

Point in Travel Decision Process—Mobile Users
(Respondents gathering information for a trip on a mobile device)



Point in Travel Decision Process—Desktop Users
(Respondents gathering information for a trip on a desktop)



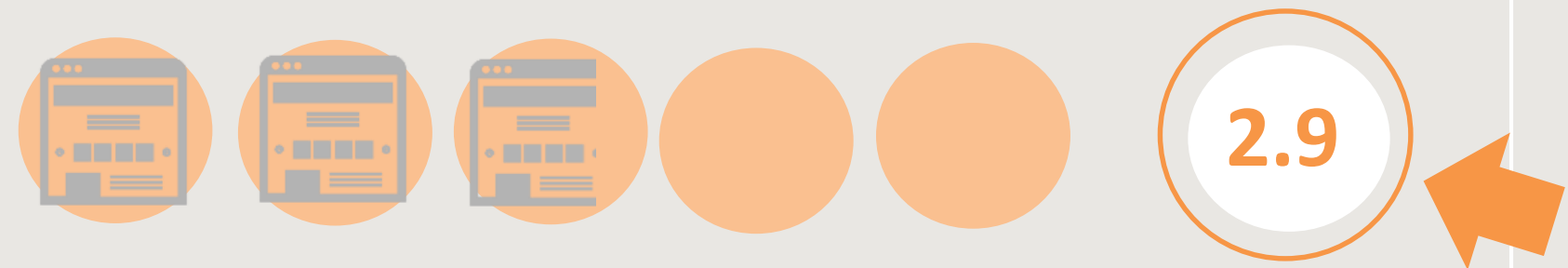
DMO WEBSITE USE—BY DEVICE TYPE

Average Number of Page Views

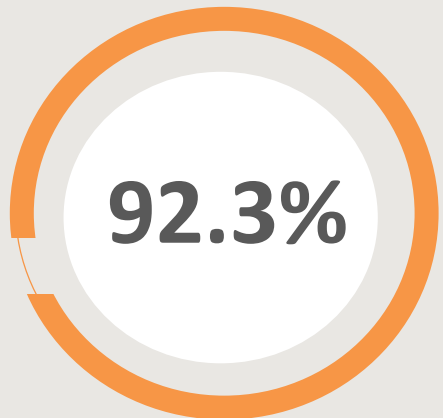
Average Session Duration

New Users

MOBILE



00:03:40

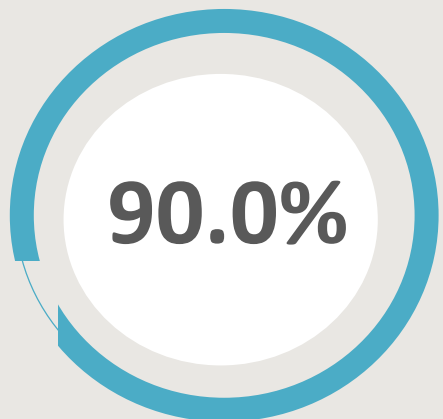


Of mobile users are new users

DESKTOP



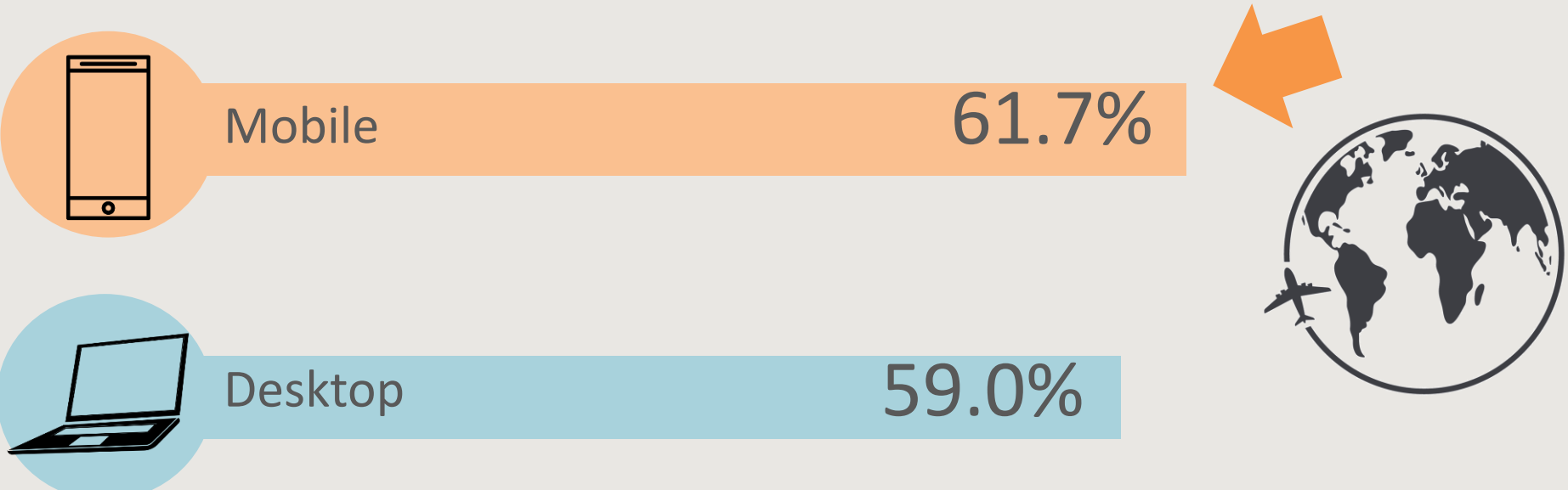
00:06:40



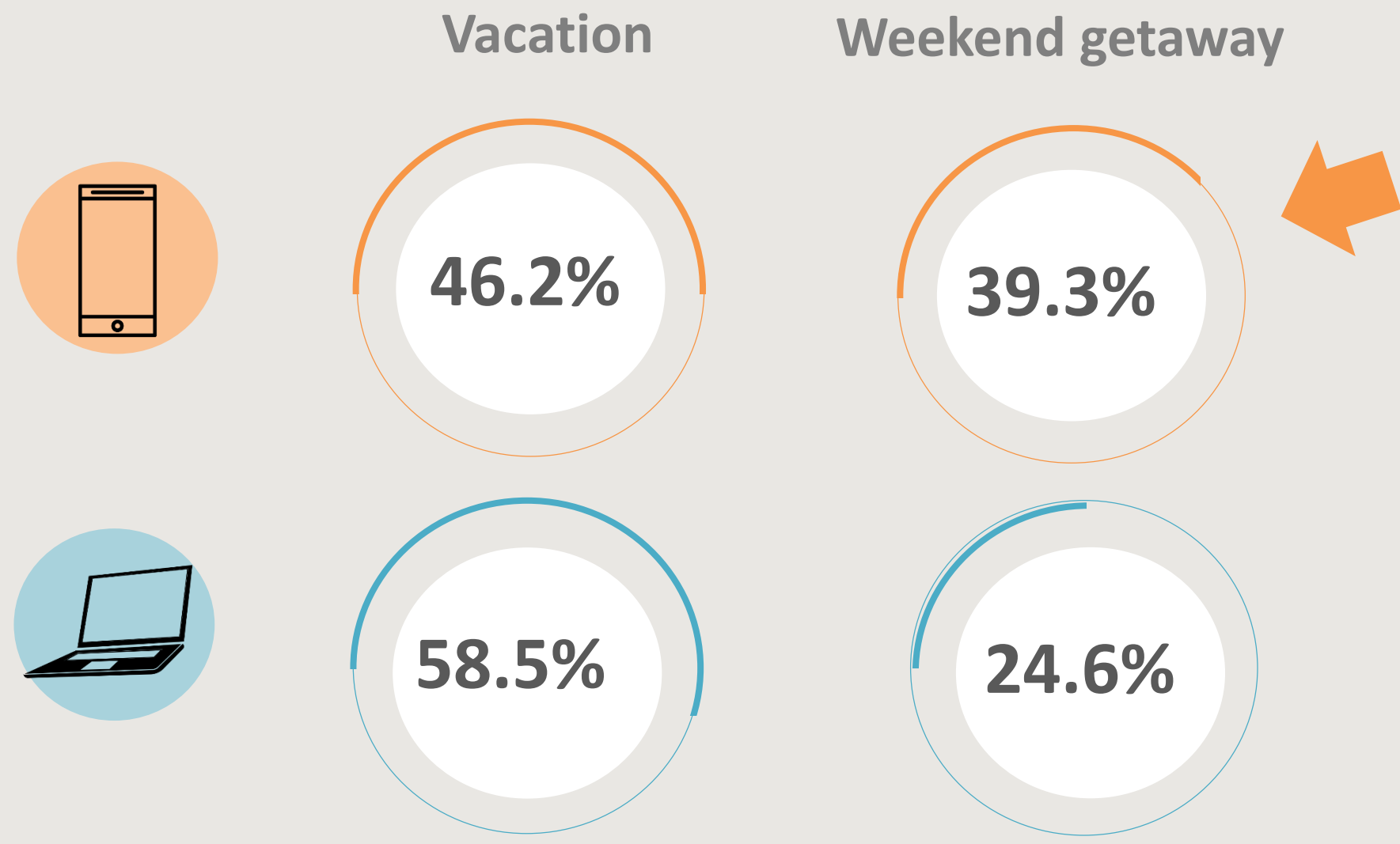
Of desktop users are new users

DMO WEBSITE USE—BY DEVICE TYPE

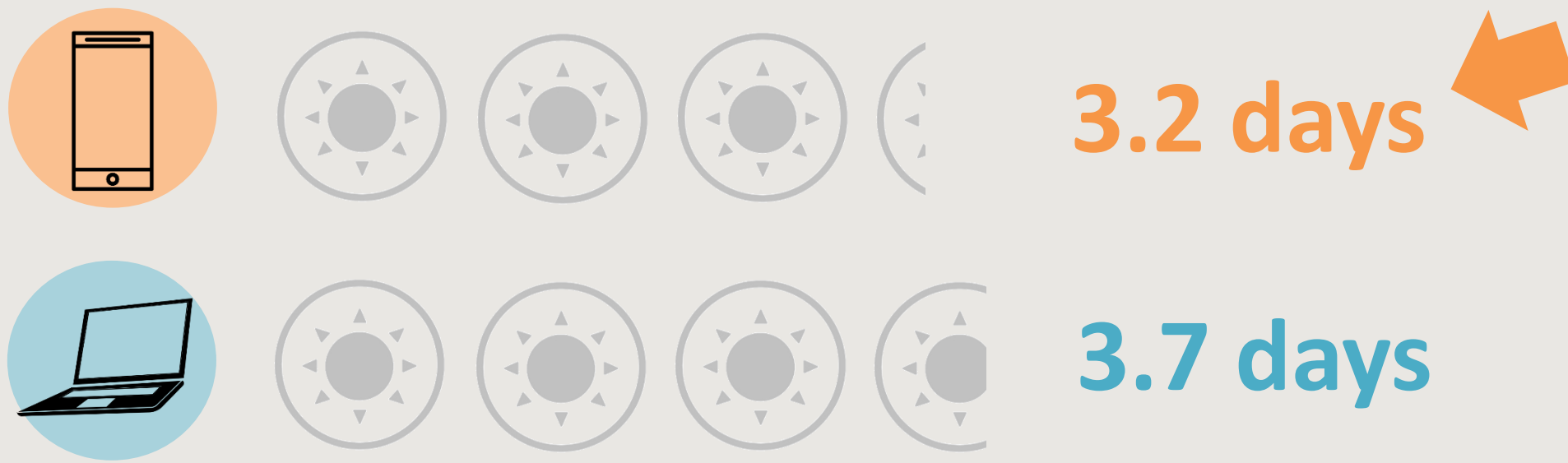
Gathering Information for a Trip



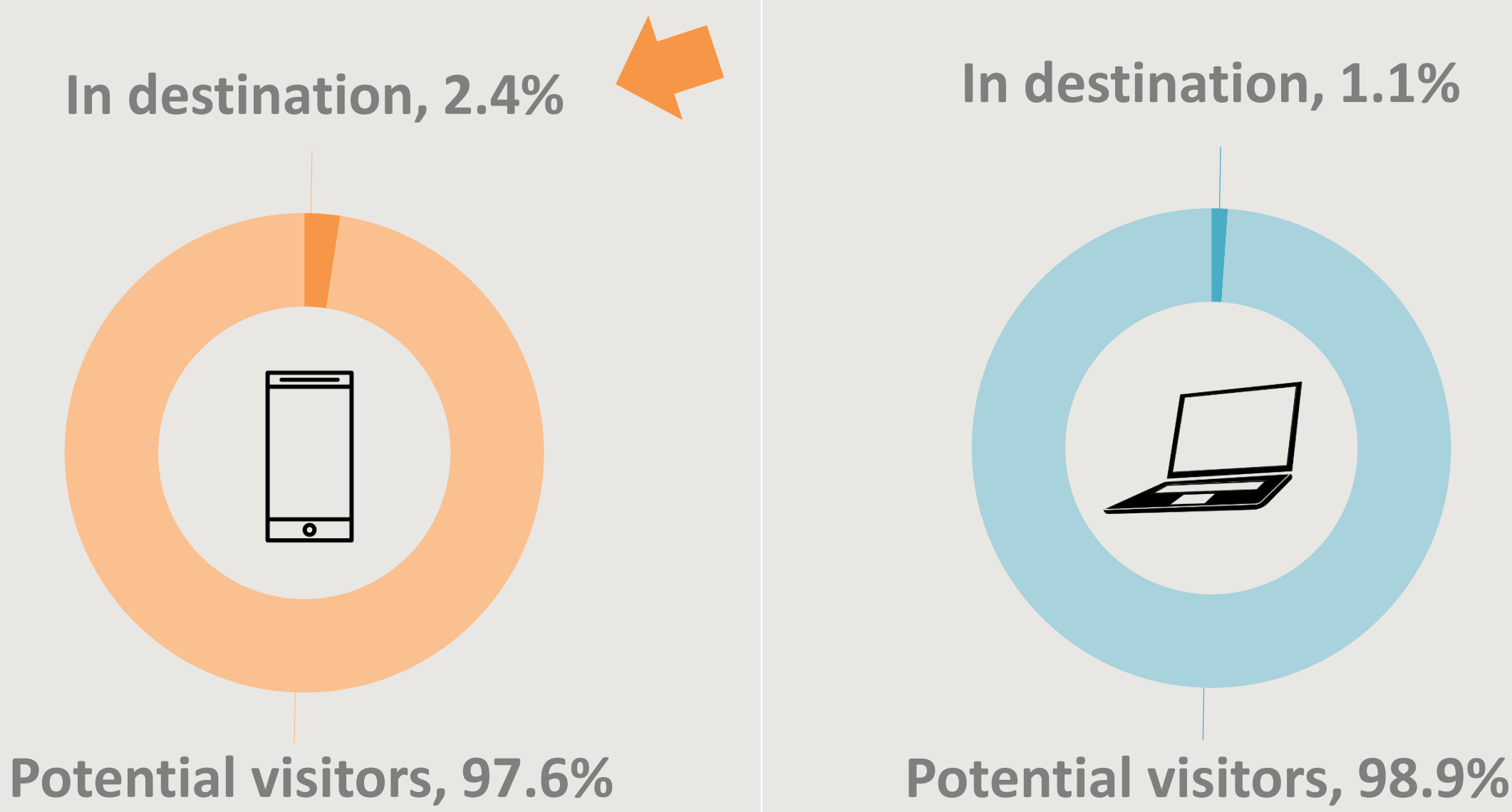
Vacation or Weekend Getaway



Average Intended Length of Stay



Users Currently in Destination



DMO WEBSITE USE BY USER TYPE



Potential Visitors



Meeting Planners



Journalists

DMO WEBSITE USE—BY USER TYPE

Top 5 Page Types

POTENTIAL VISITORS



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

MEETING PLANNERS



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

} No Meetings Page

JOURNALISTS



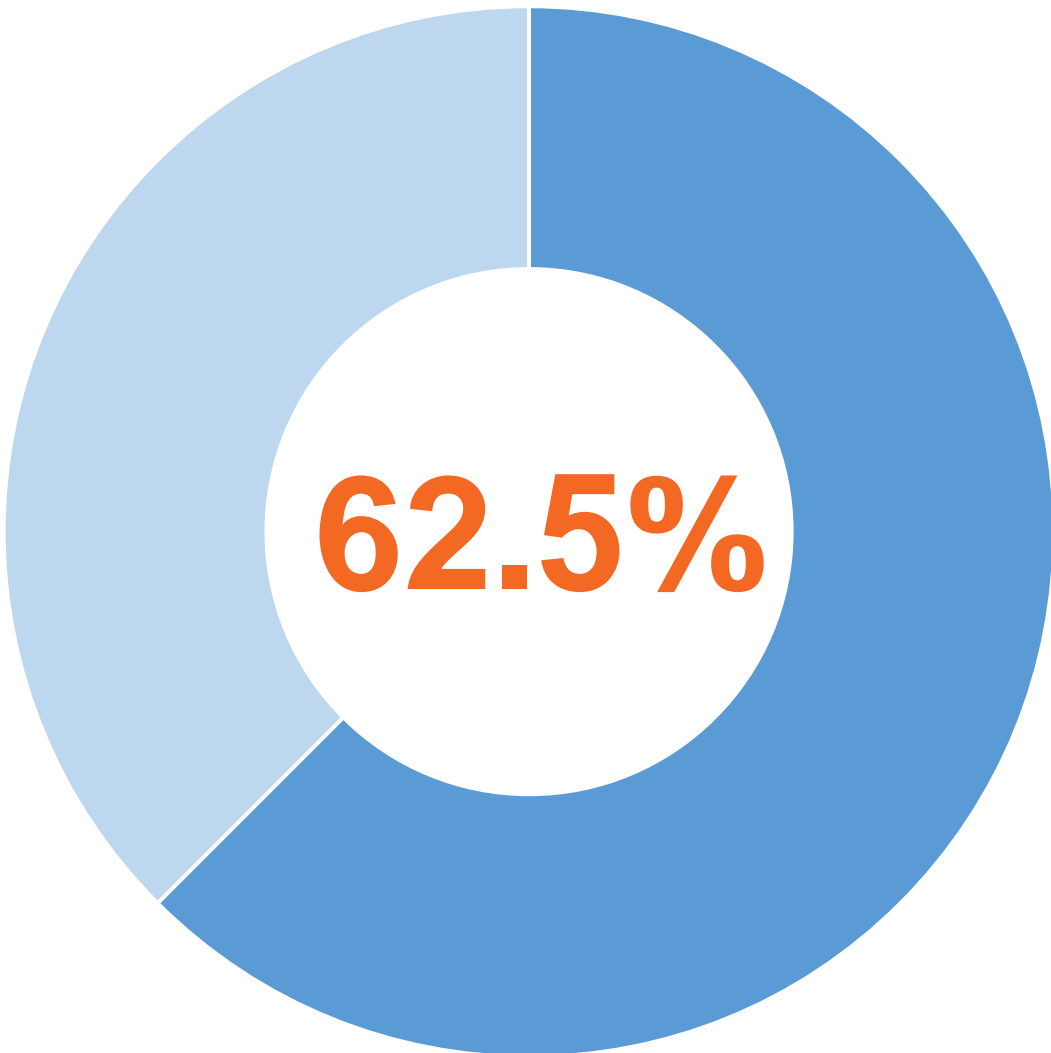
- Event Calendar
- Places to Stay
- Event Calendar/Specific Event
- General Destination Information
- Itineraries/Planning

} No Media/Press Page

THE INFLUENCE OF DMO WEBSITES

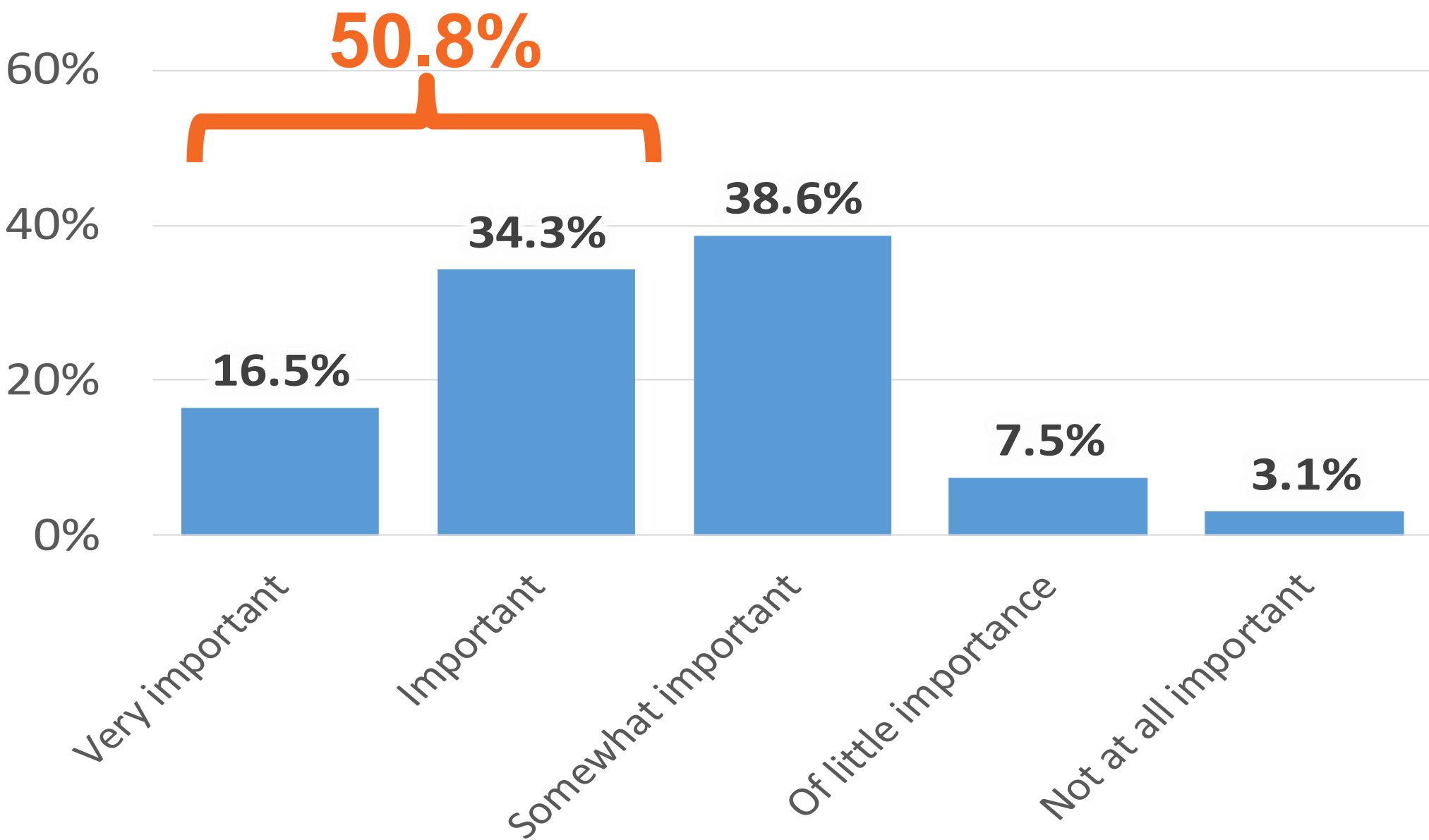
Impact of DMO Website on Destination Decision

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



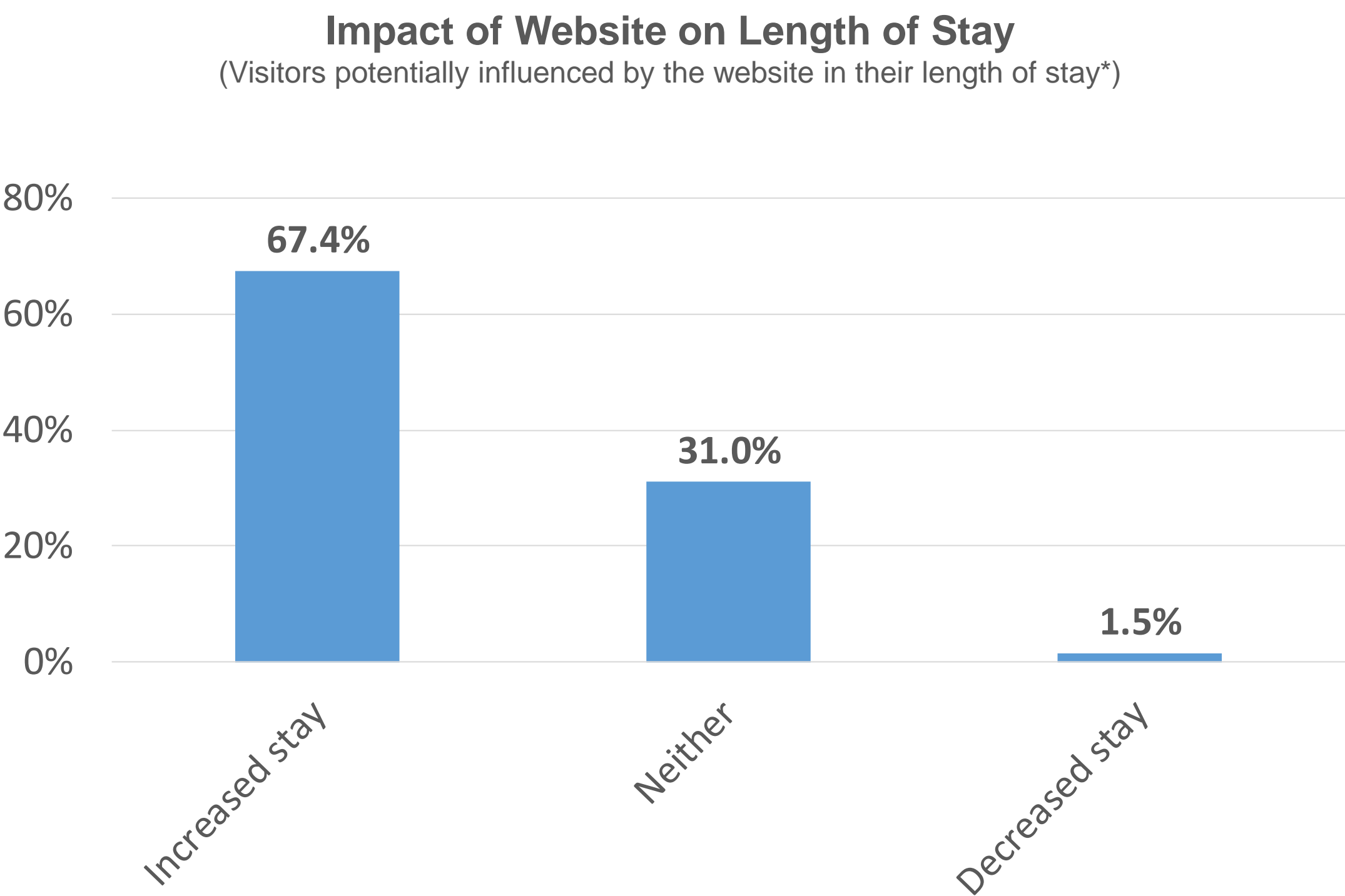
Question: Do you feel that our website helped you make your decision to visit [Destination]?
Base: Visitors potentially influenced by the website in the destination decision. 15,706 completed surveys.

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



*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.

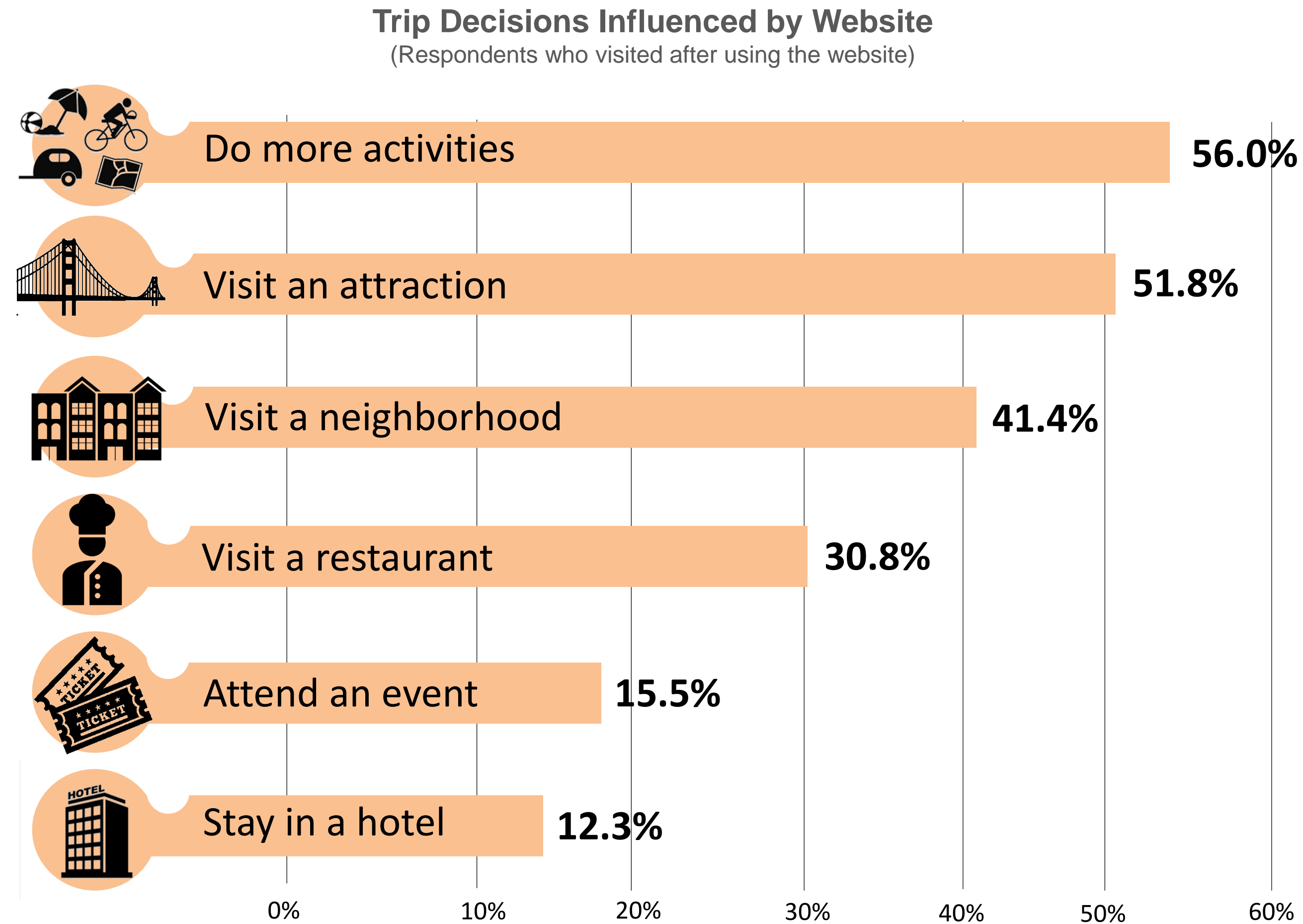
Question: How did our website influence the number of days you spent in [Destination] on this trip?
Base: Visitors potentially influenced by the website in their length of stay. 1,162 completed surveys.

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.

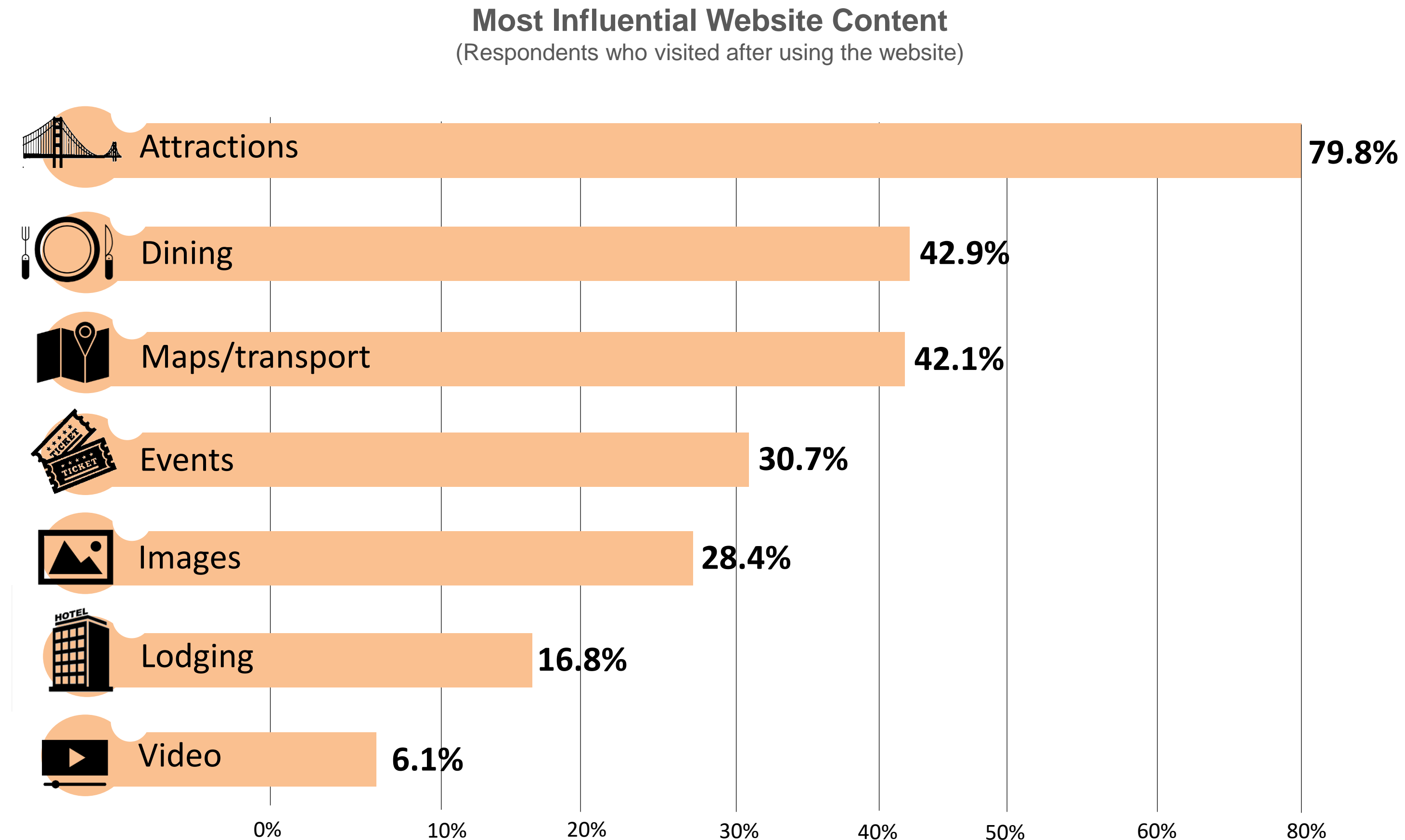
Trip Decisions Influenced by DMO Website



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



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.

Perceptions and Ratings of DMO Websites

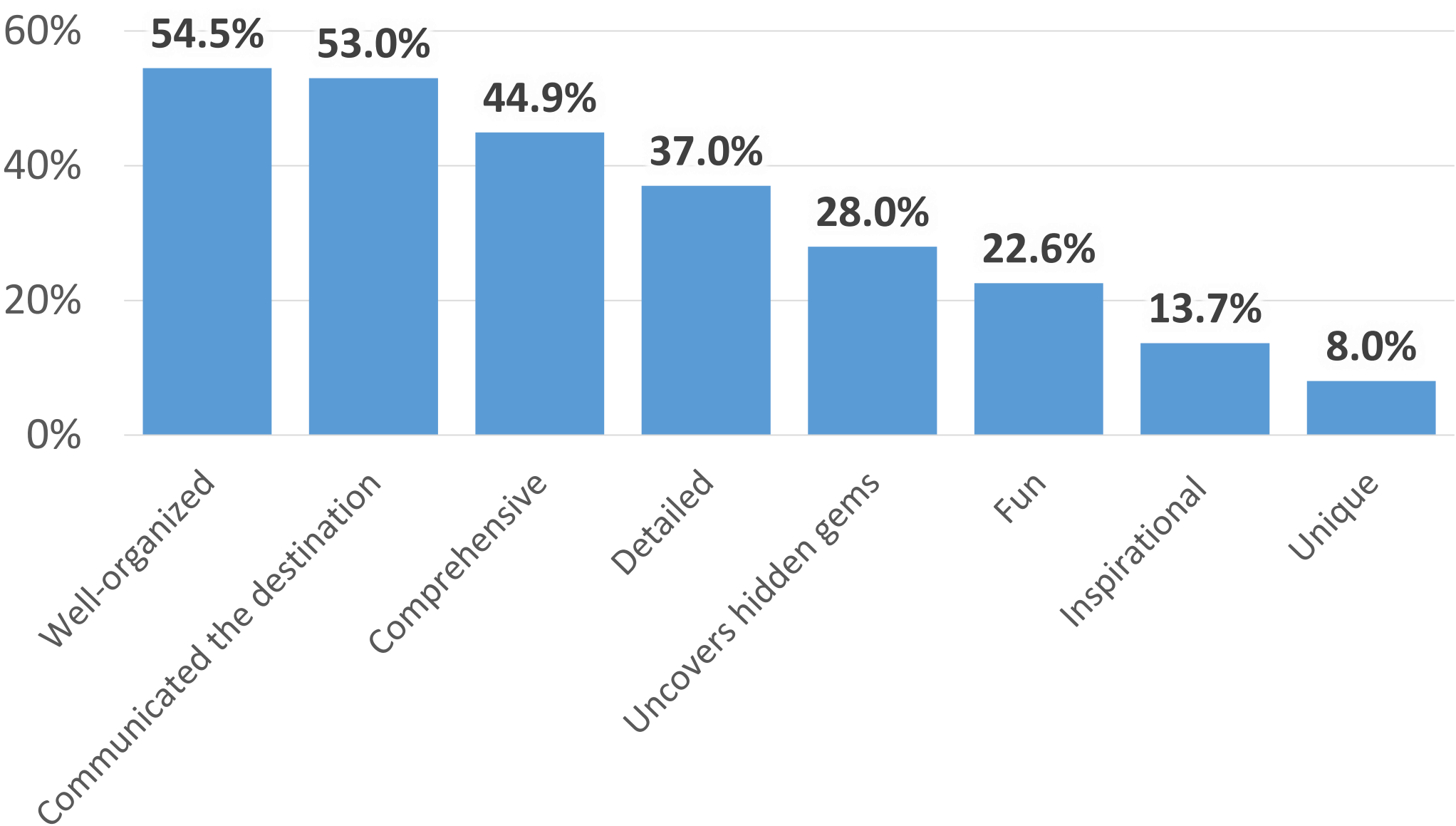
Likelihood to Recommend the Website – 10 Point Scale (Respondents who visited after using the website)

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.

THE ECONOMIC IMPACT OF DMO WEBSITES



Incremental Trips Generated in 2016 by DMO Websites Studied

304,425



Extended Trip Days Generated in 2016 by DMO Websites Studied

146,690



Incremental Roomnights Generated in 2016 by DMO Websites Studied

533,182



Economic Impact Generated in 2016 by DMO Websites Studied

\$324,765,346



Average Economic Impact Per Real, New User

\$36.72

In direct visitor spending

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

In Summary

Knowing Who Uses Your Site and How Can Maximize Your Economic Impact

- Ensure efficiency in your advertising and marketing strategies to drive valuable (high funnel) audiences
- Optimize key pages for conversion
- Measure and report your site's performance more accurately

Thank you!

To read the report:

www.dmawest.org/foundation/research/

Ask your questions now!

Type into the Question Box



You can also reach us: Info@destinationanalysts.com