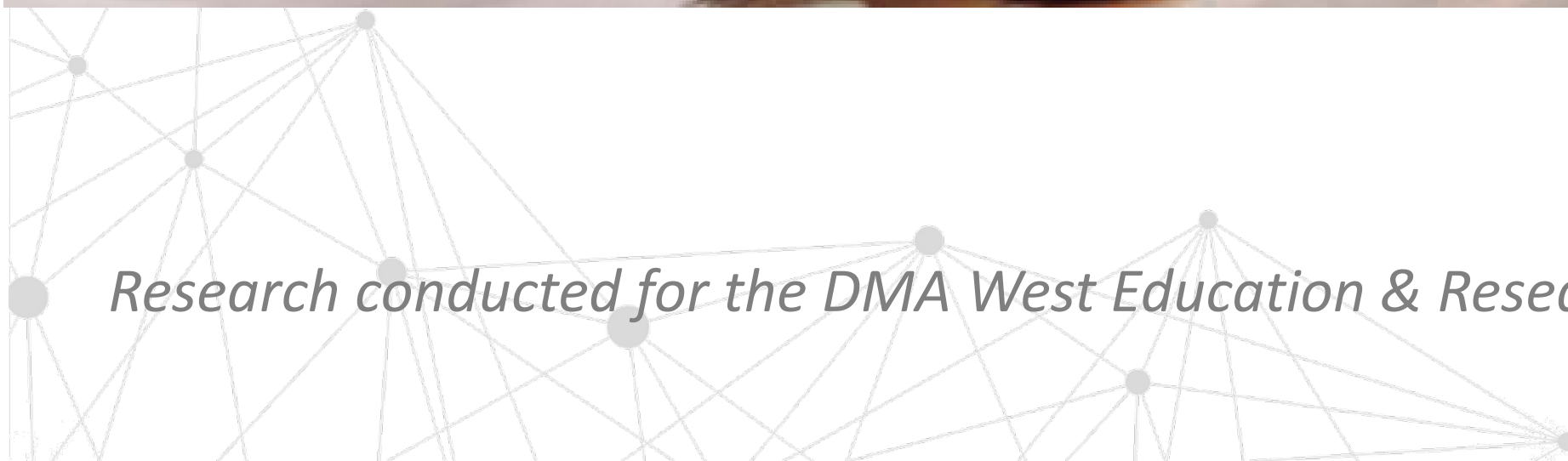# Destination Analysts
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THE IMPACT OF DMO WEBSITES

DMO Website
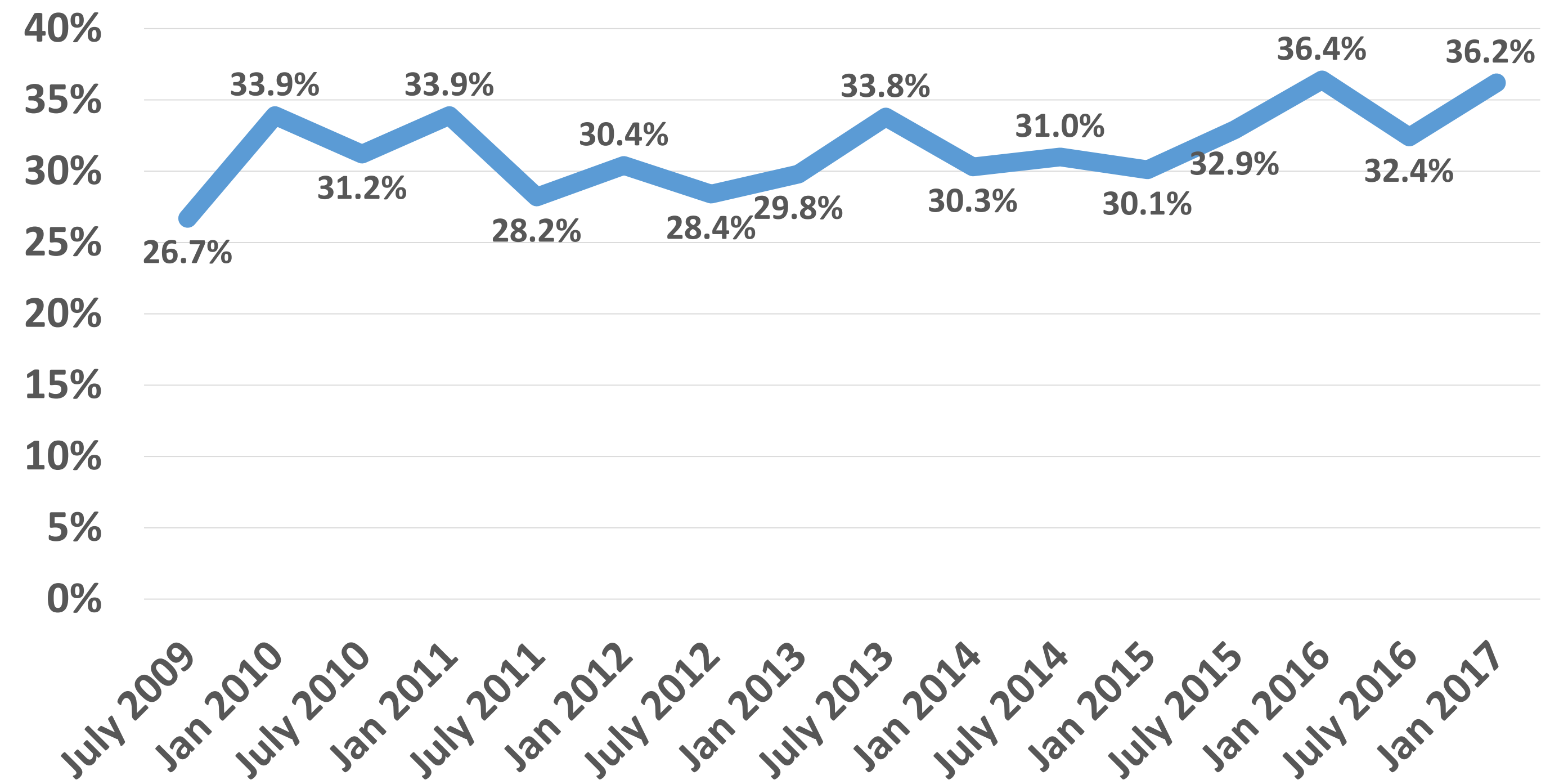User & Conversion Study

EXECUTIVE SUMMARY OF FINDINGS

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

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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

26.7%
33.9%
31.2%
33.9%
28.2%
30.4%
28.4%
29.8%
33.8%
30.3%
31.0%
30.1%
32.9%
36.4%
32.4%
36.2%

July 2009, Jan 2010, July 2010, Jan 2011, July 2011, Jan 2012, July 2012, Jan 2013, July 2013, Jan 2014, July 2014, Jan 2015, July 2015, Jan 2016, July 2016, Jan 2017

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

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Background: Travelers' Use of 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
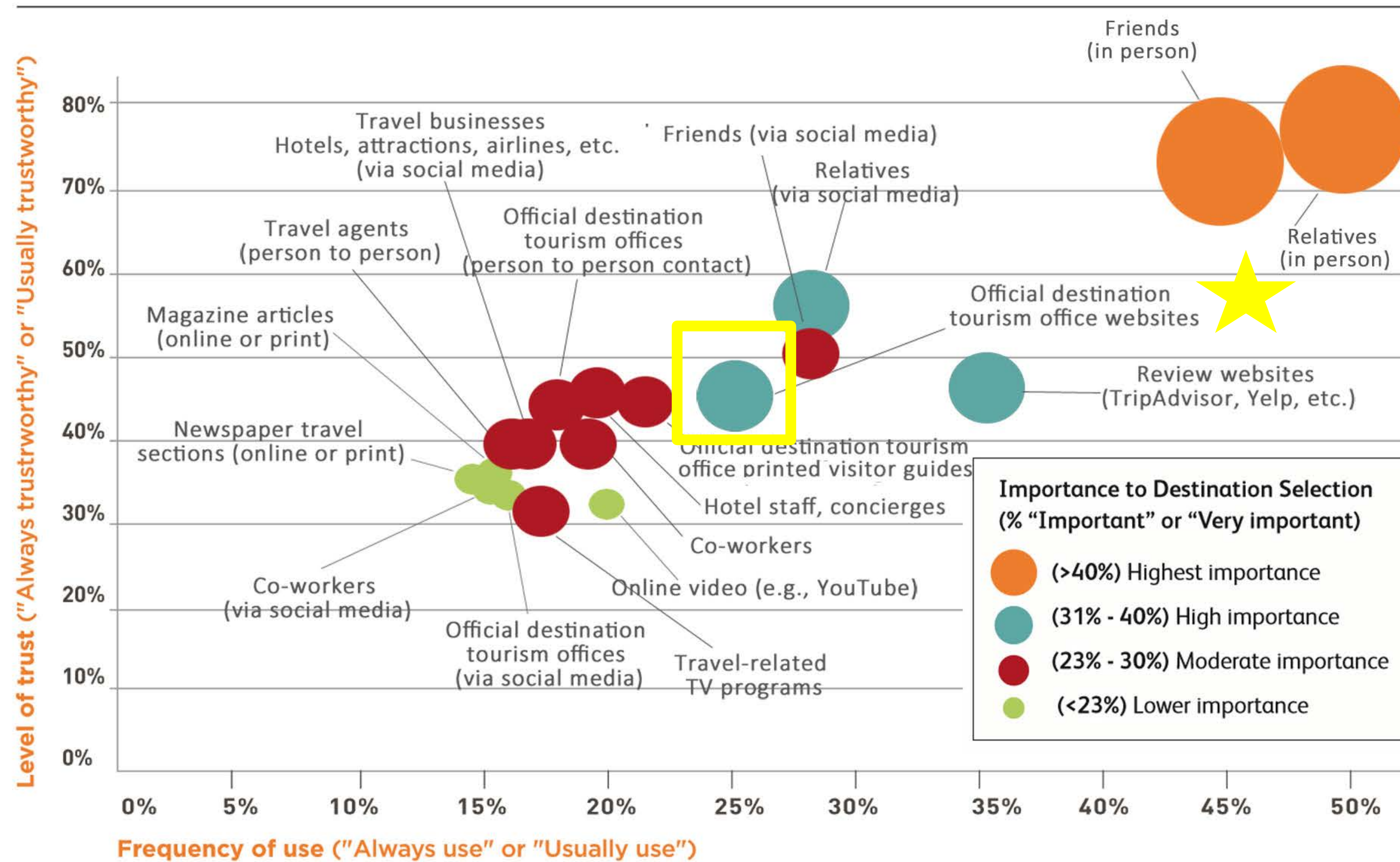
The chart at left provides a comparative view of the key resources used in travel research by mapping their frequency of use (X-axis) against the level of trust travelers place in them (Y-axis) and their weight of importance in the destination decision process (bubble size)*. DMO websites occupy an important 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*TM ---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.

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.
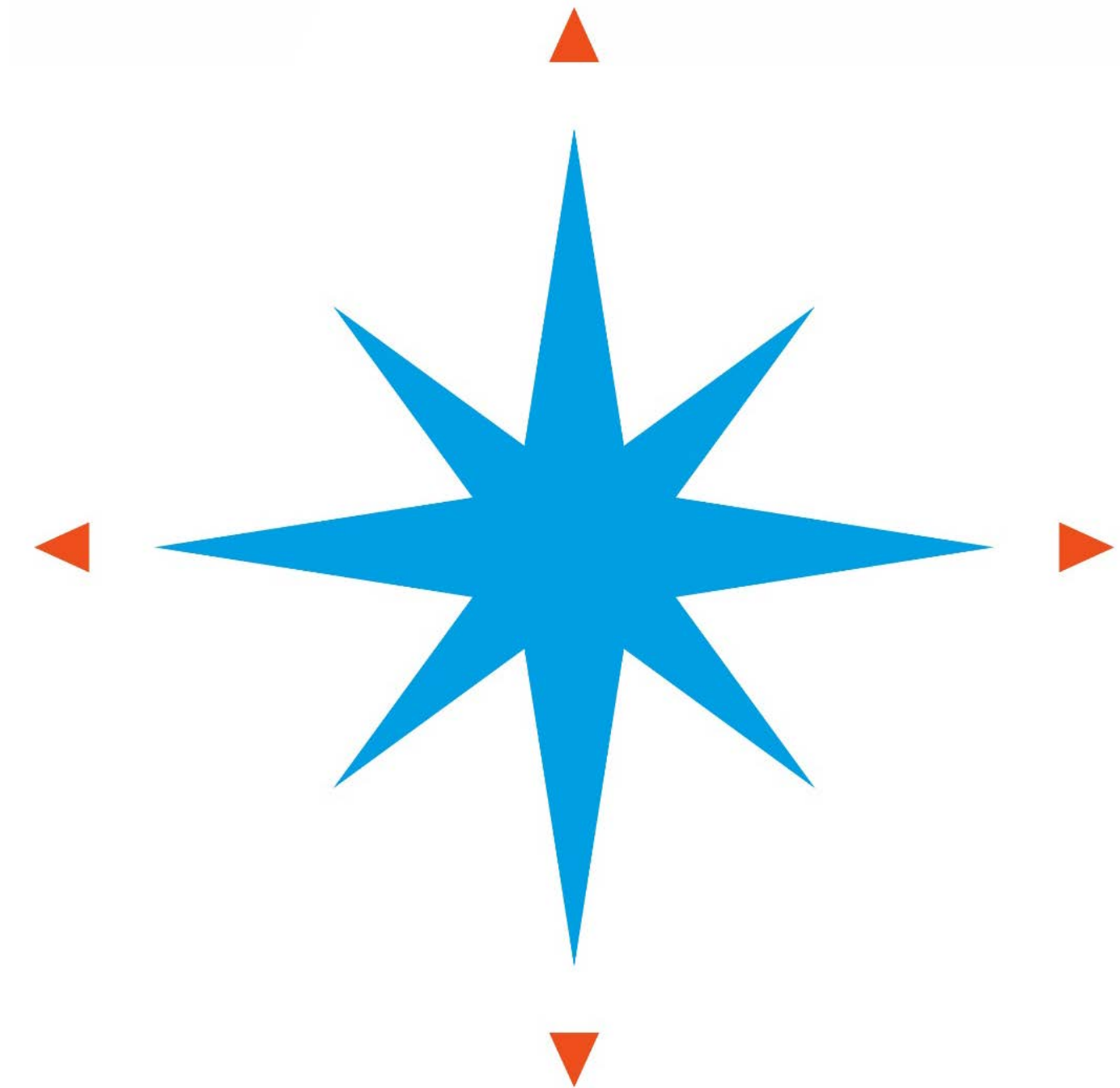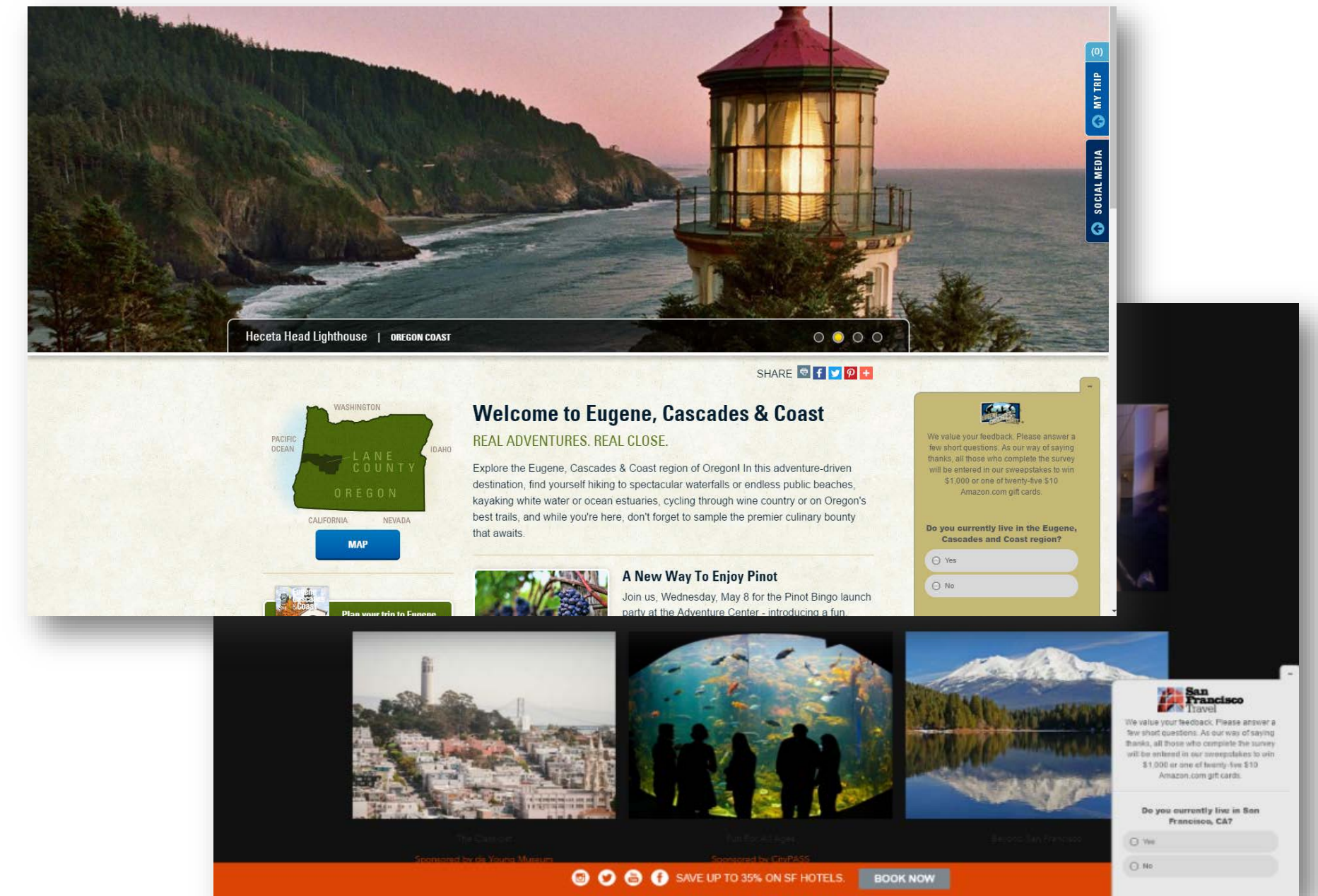
Methodology

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.

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

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.
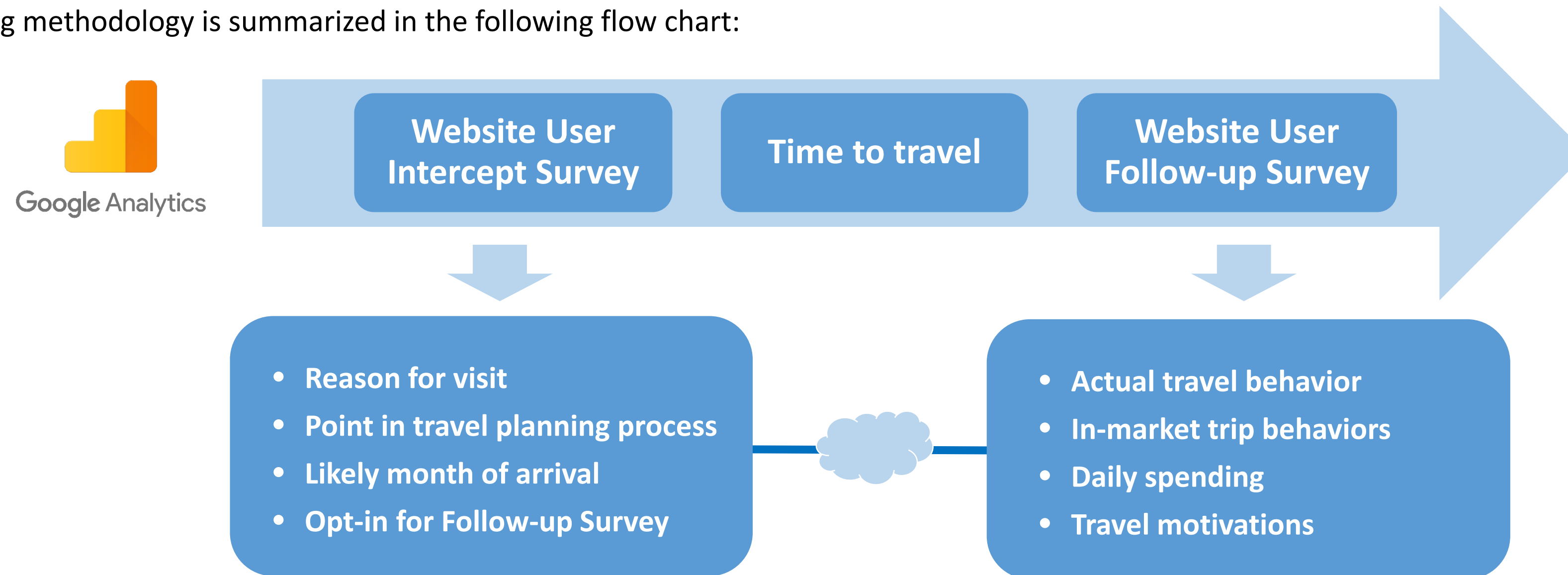
The data from the two surveys was then combined for each respondent, providing a robust set of data on site users. For each respondent, beginning with their initial planning interactions with the website, the research process allows for tracking actual subsequent in-market behavior. Ultimately, this 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.
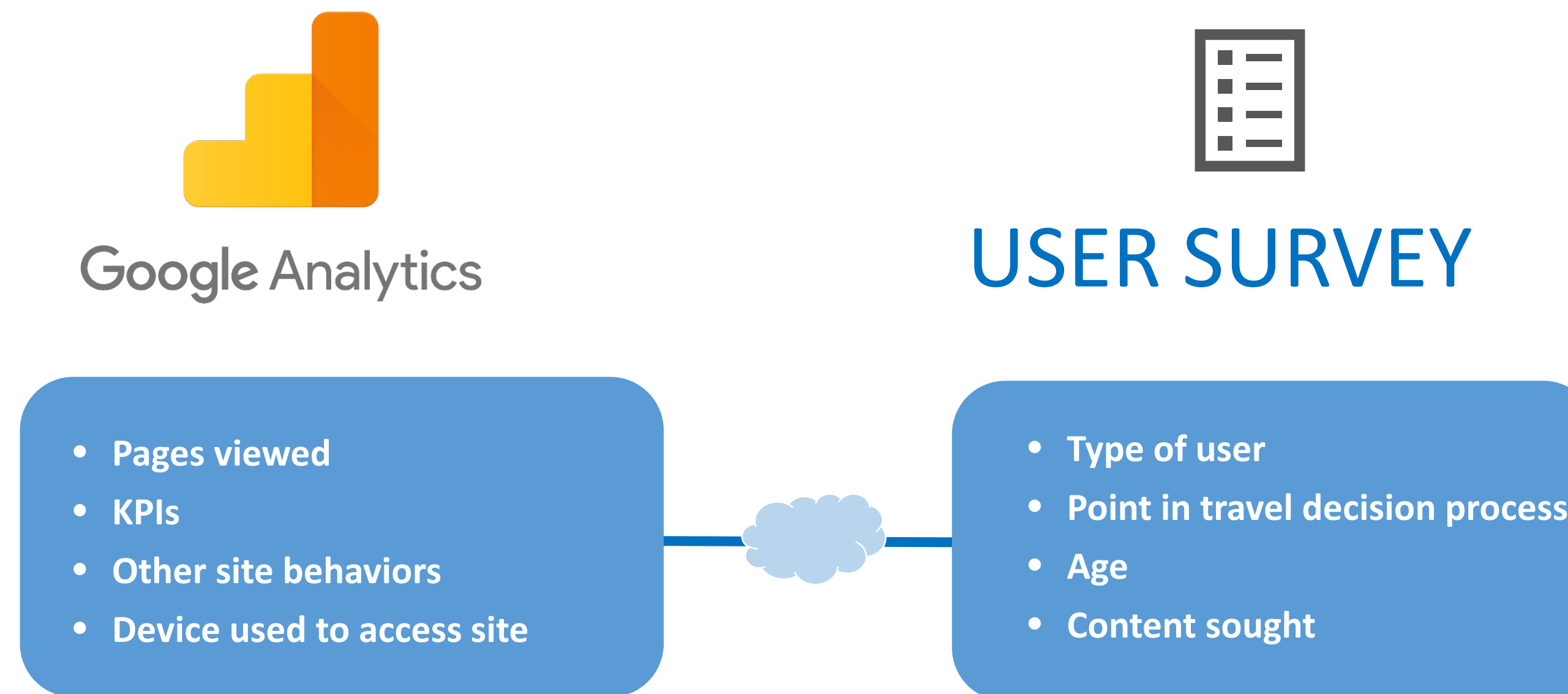
The study's overarching methodology is summarized in the following flow chart:

Google Analytics

| Website User Intercept Survey | Time to travel | Website User Follow-up Survey |

- Reason for visit
- Point in travel planning process
- Likely month of arrival
- Opt-in for Follow-up Survey

- Actual travel behavior
- In-market trip behaviors
- Daily spending
- Travel motivations

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.

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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.**

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**

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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.
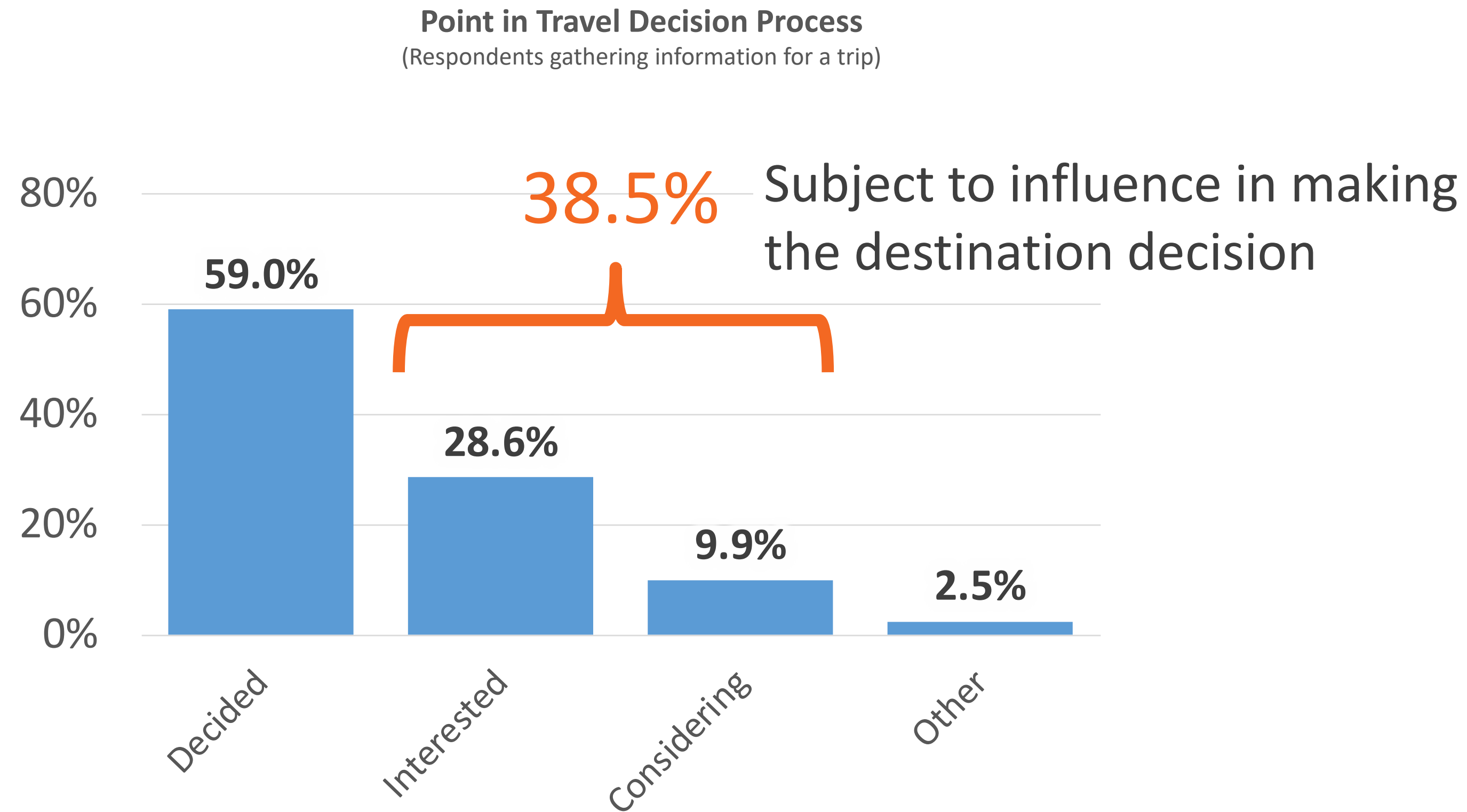
Type of Website User
(All survey respondents)
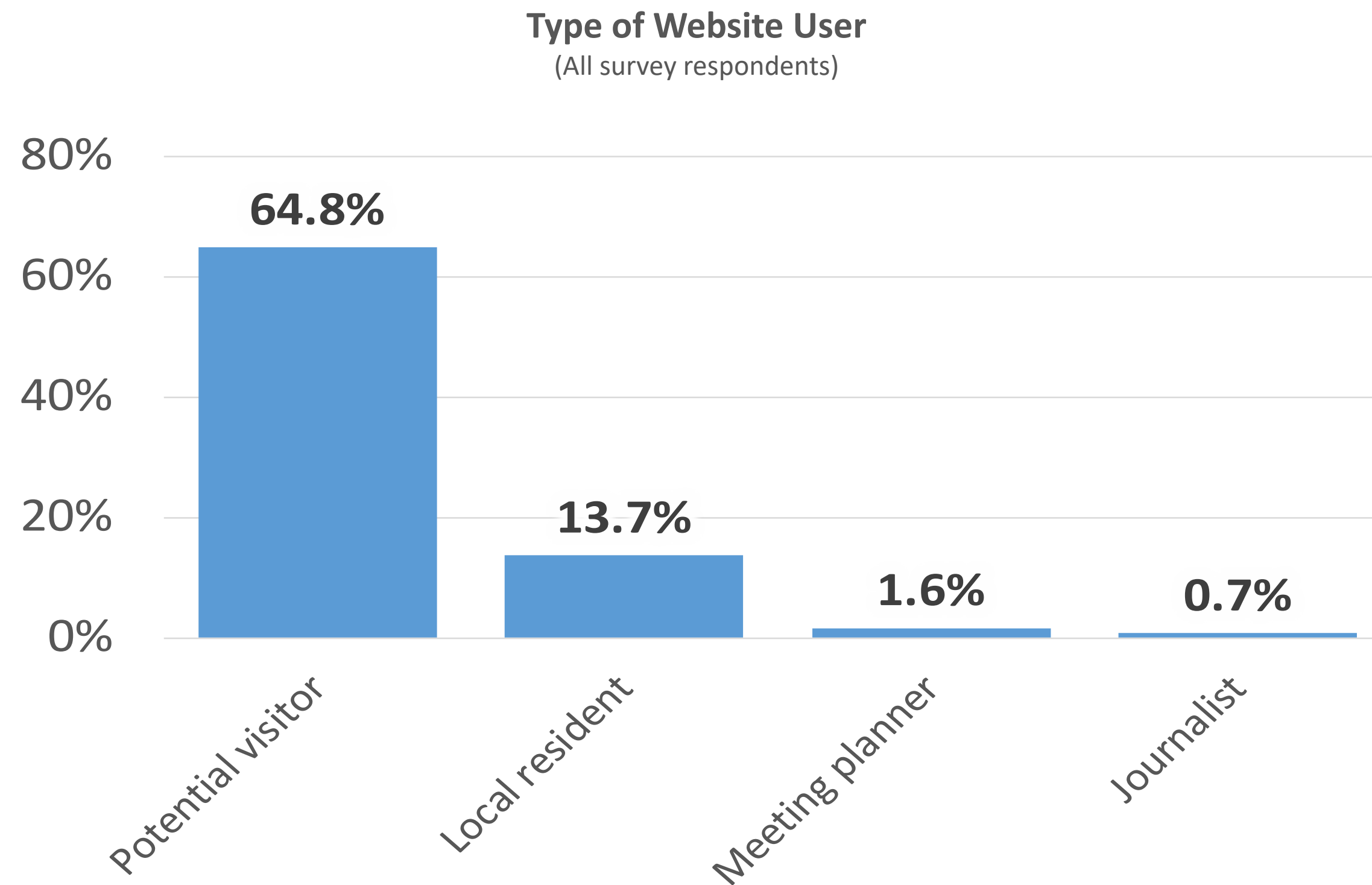
Question: Which of the following best describes you?
Base: All survey respondents. 379,966 completed surveys.

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.
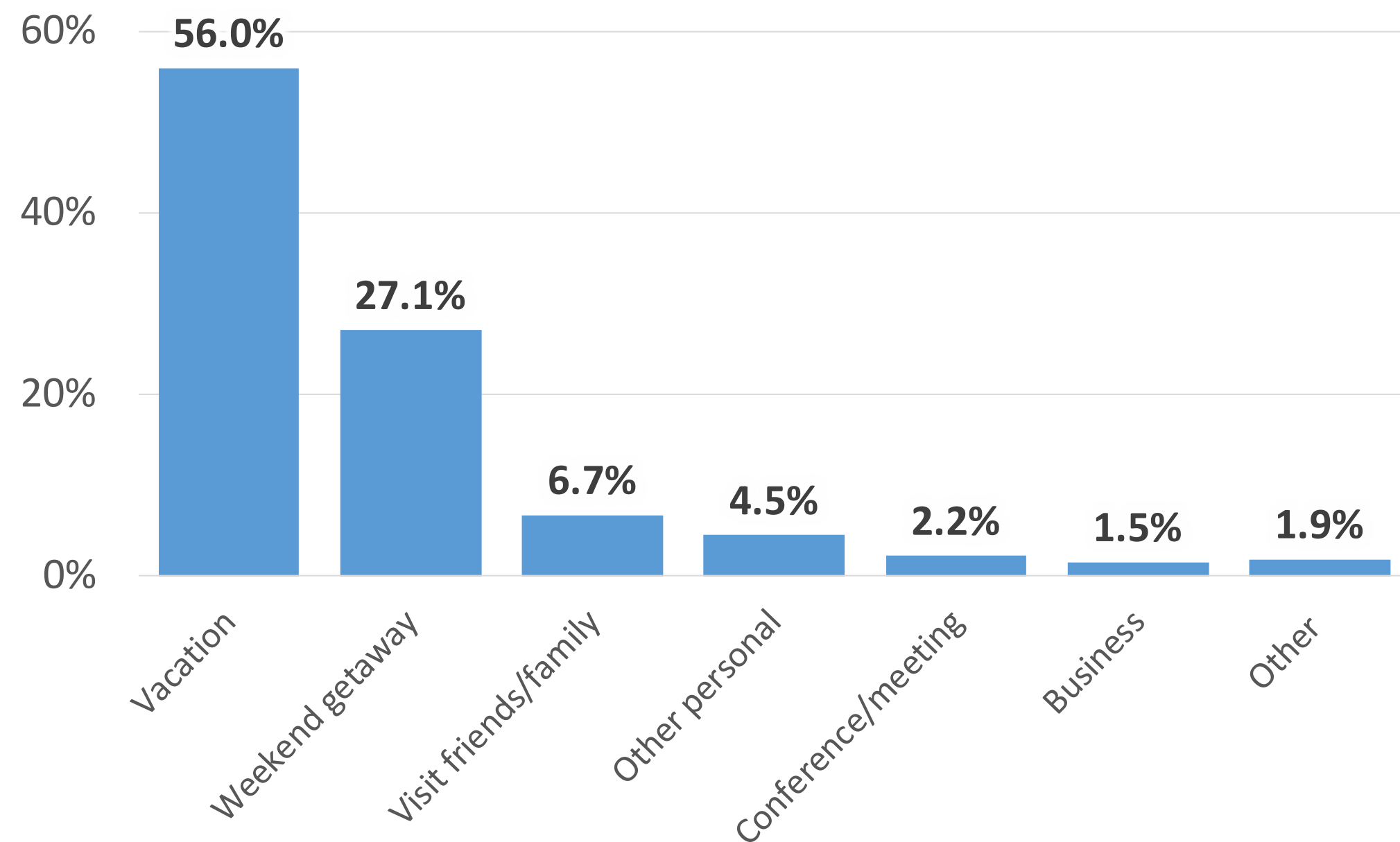
Point in Travel Decision Process
(Respondents gathering information for a trip)

38.5% Subject to influence in making the destination decision

59.0% — Decided
28.6% — Interested
9.9% — Considering
2.5% — Other

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.

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DMO Website Users who are Potential Visitors—Intended Trip

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

|	
Vacation	56.0%
Weekend getaway	27.1%
Visit friends/family	6.7%
Other personal	4.5%
Conference/meeting	2.2%
Business	1.5%
Other	1.9%

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
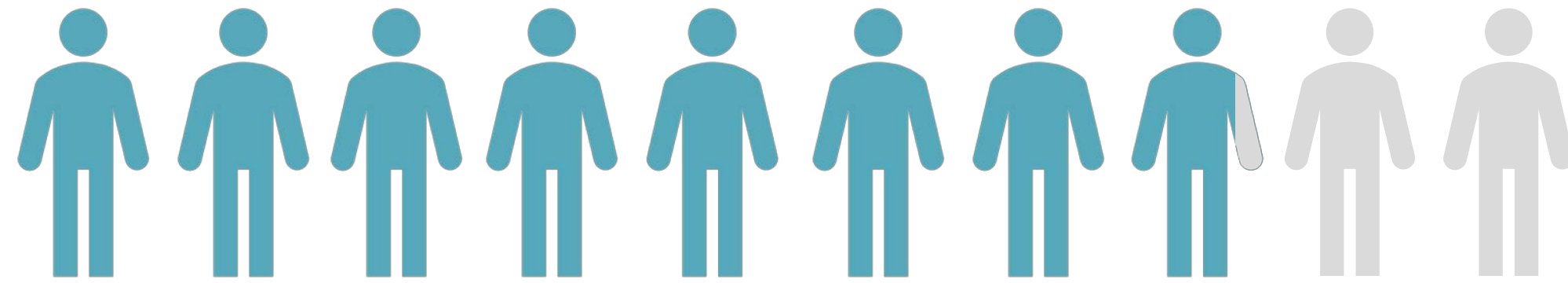(Respondents gathering information for a trip)

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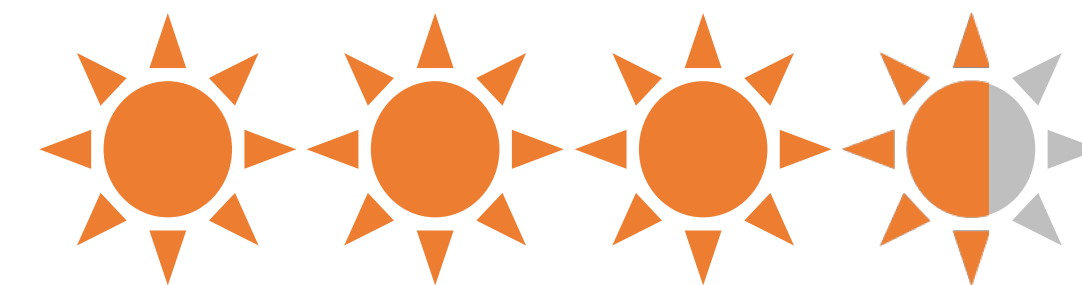
Question: How many days are you likely to stay in [Destination] on this planned or potential visit?
Base: Respondents gathering information for a trip. 231,789 completed surveys.

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)
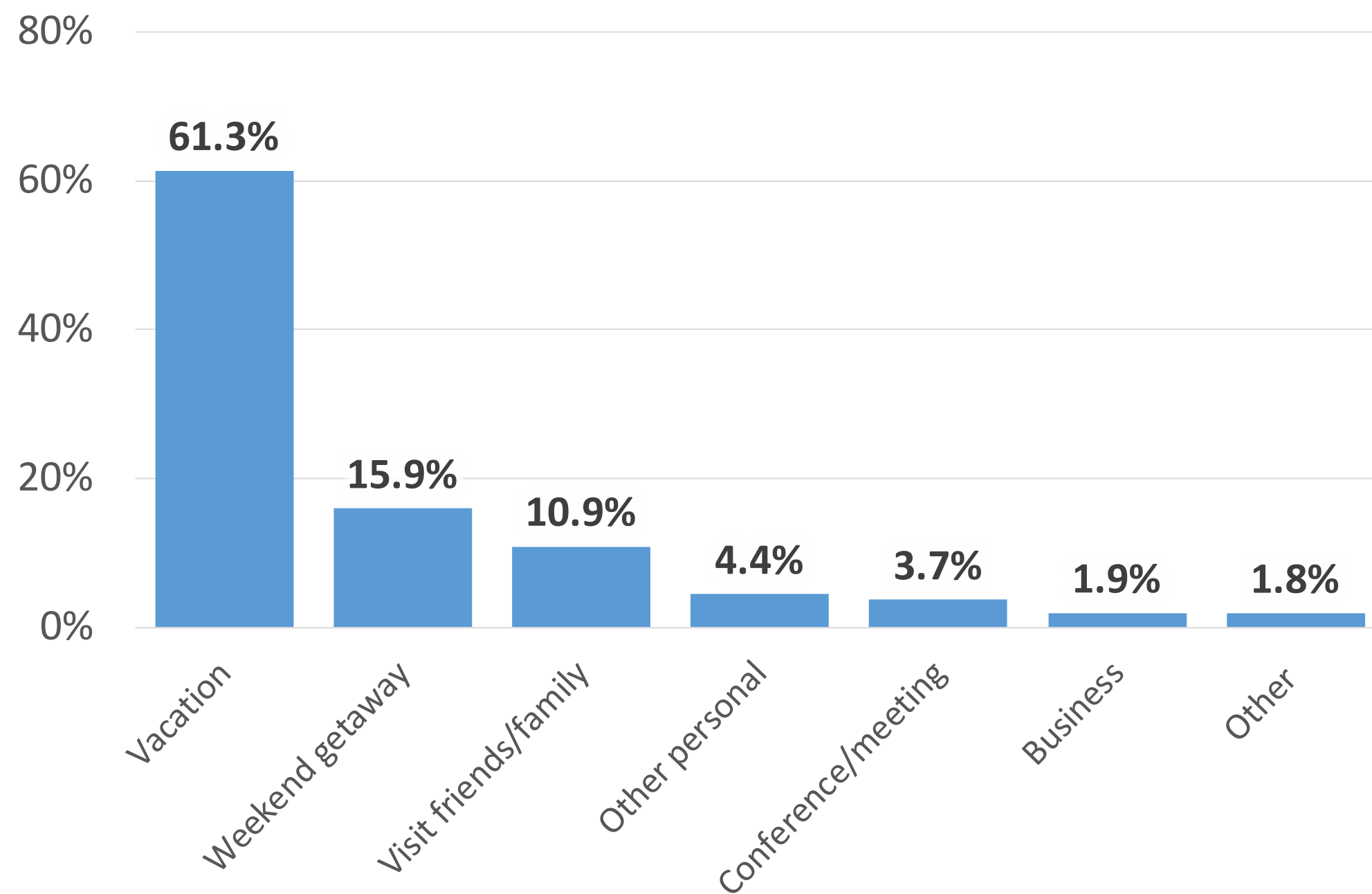
2.4 Trips

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.

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Visiting DMO Website Users—Trip Profile

Type of Trip
(Respondents who visited after using the website)

61.3% Vacation
15.9% Weekend getaway
10.9% Visit friends/family
4.4% Other personal
3.7% Conference/meeting
**1.9%** Business
1.8% Other

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
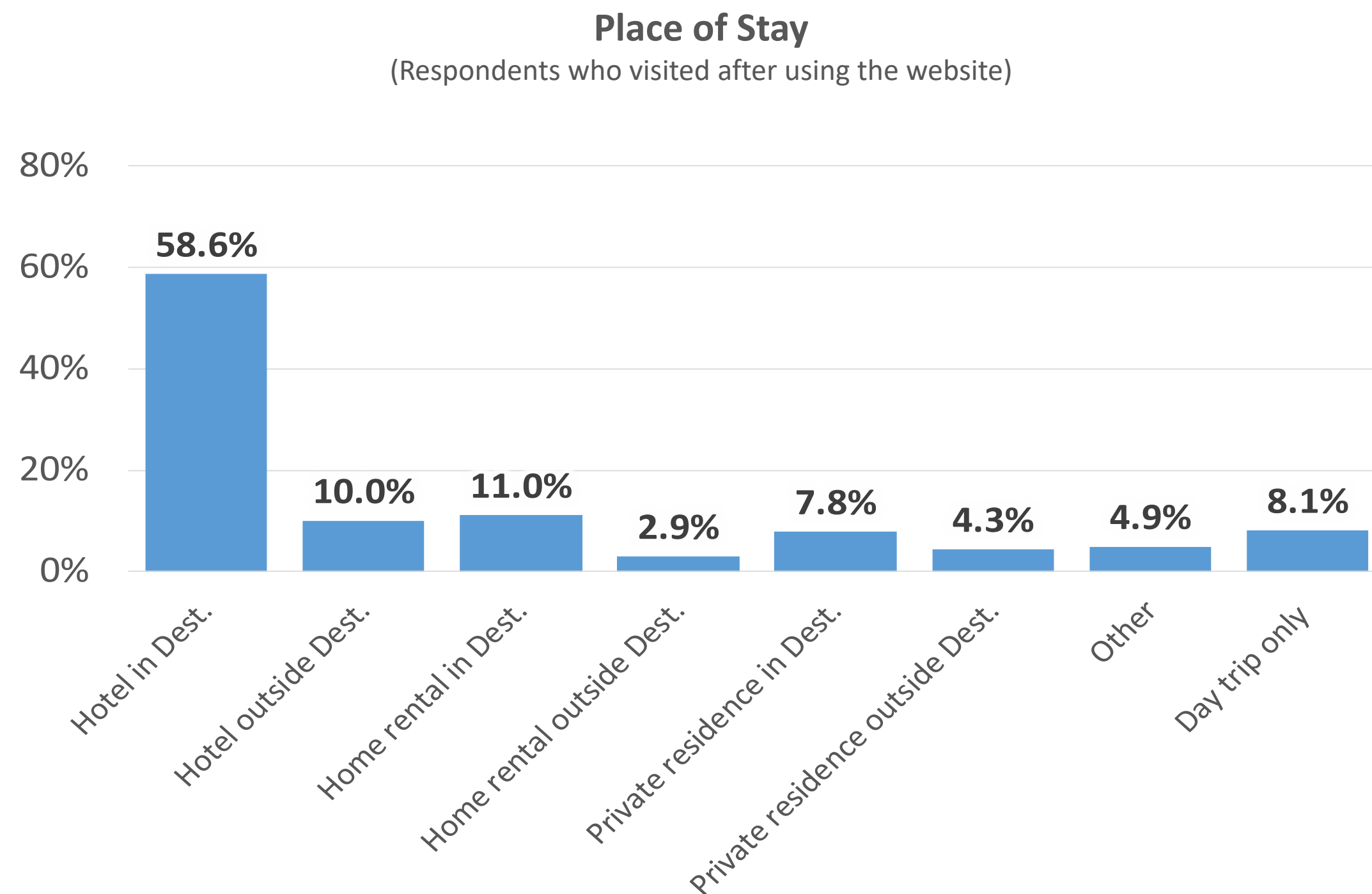(Respondents who visited after using the website)

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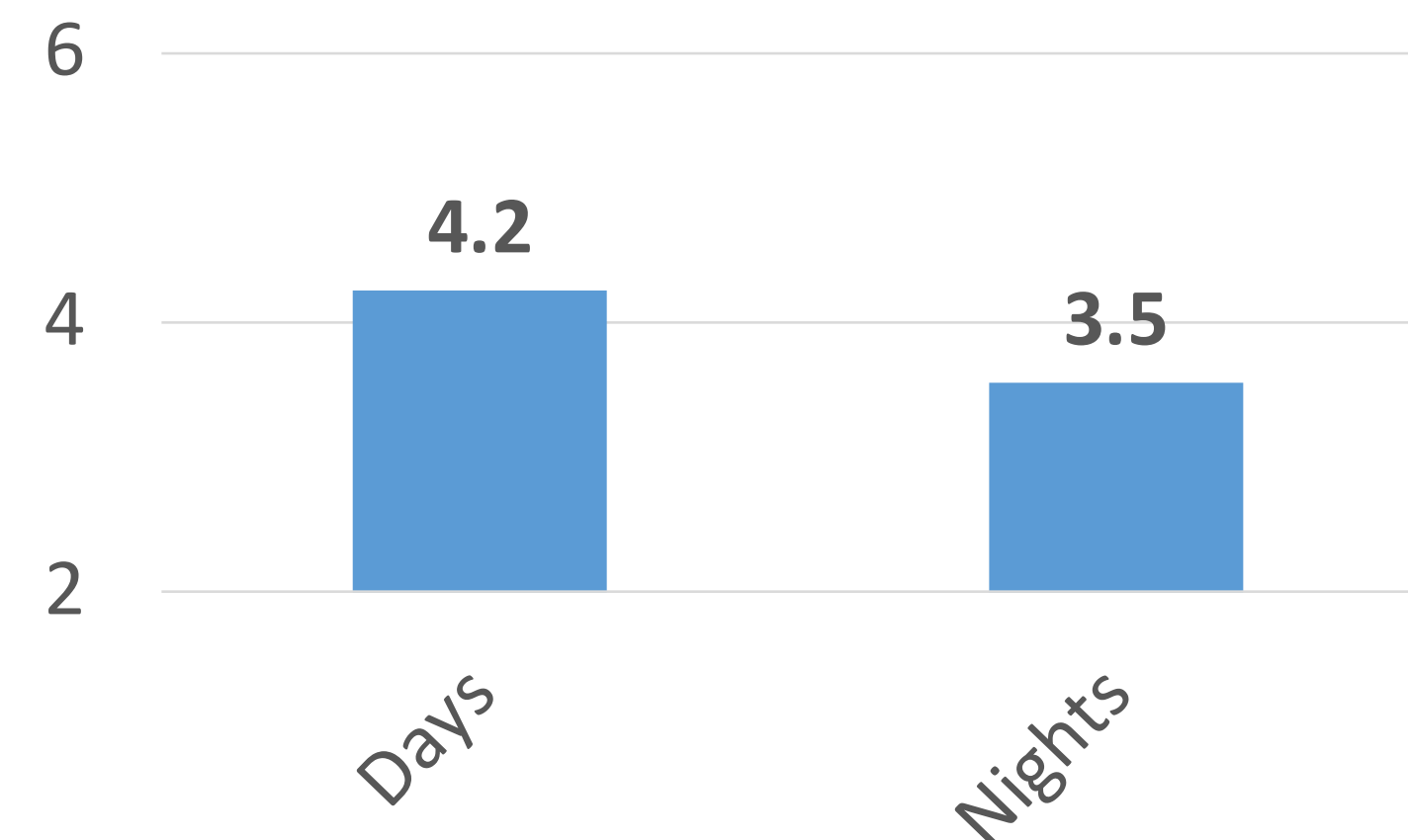
Question: How many total days and nights did you spend in [Destination] on this trip?
Base: Respondents who visited after using the website. 16,756 completed surveys.

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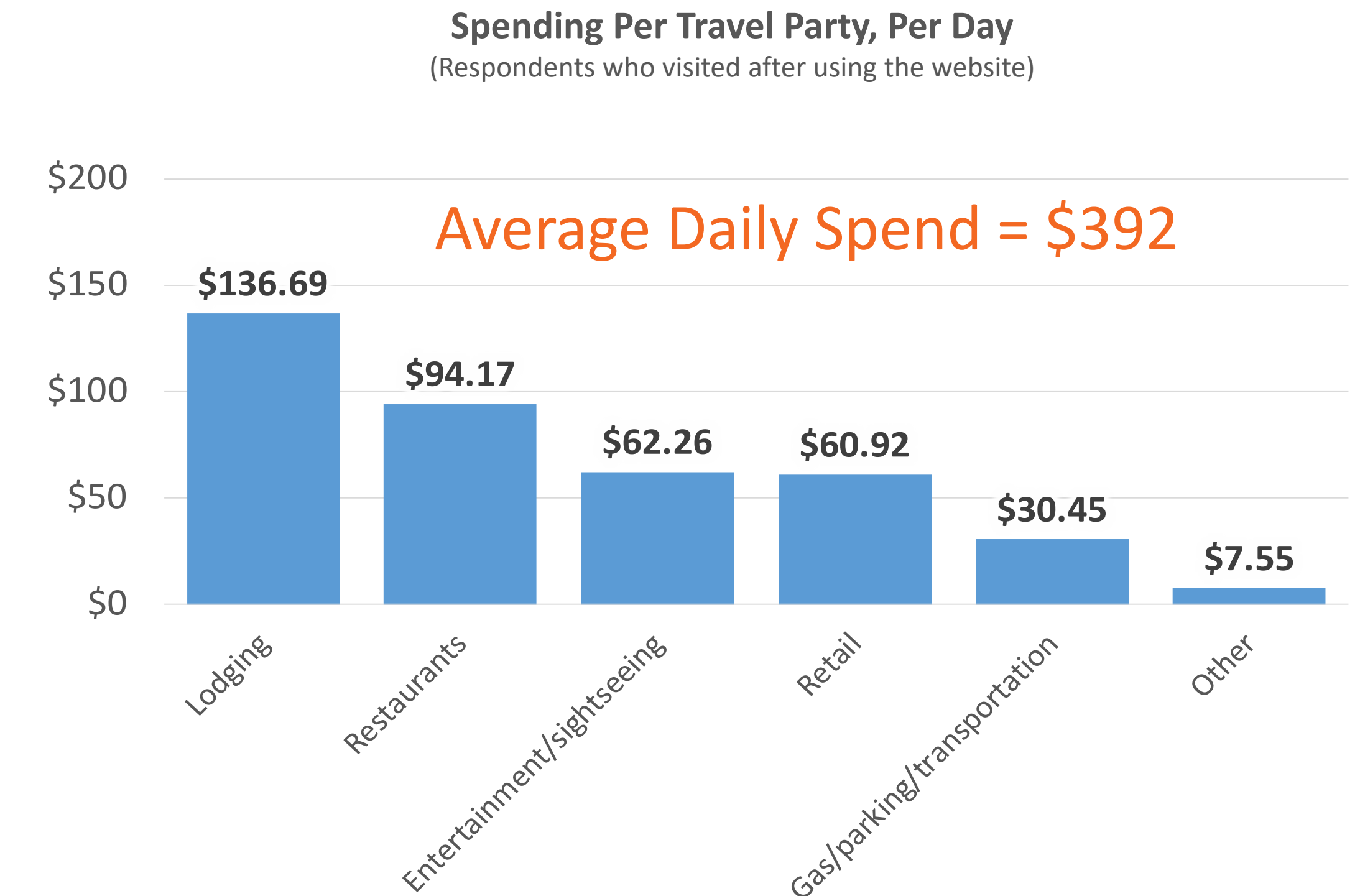
Visiting DMO Website Users—Trip Detail

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)

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.
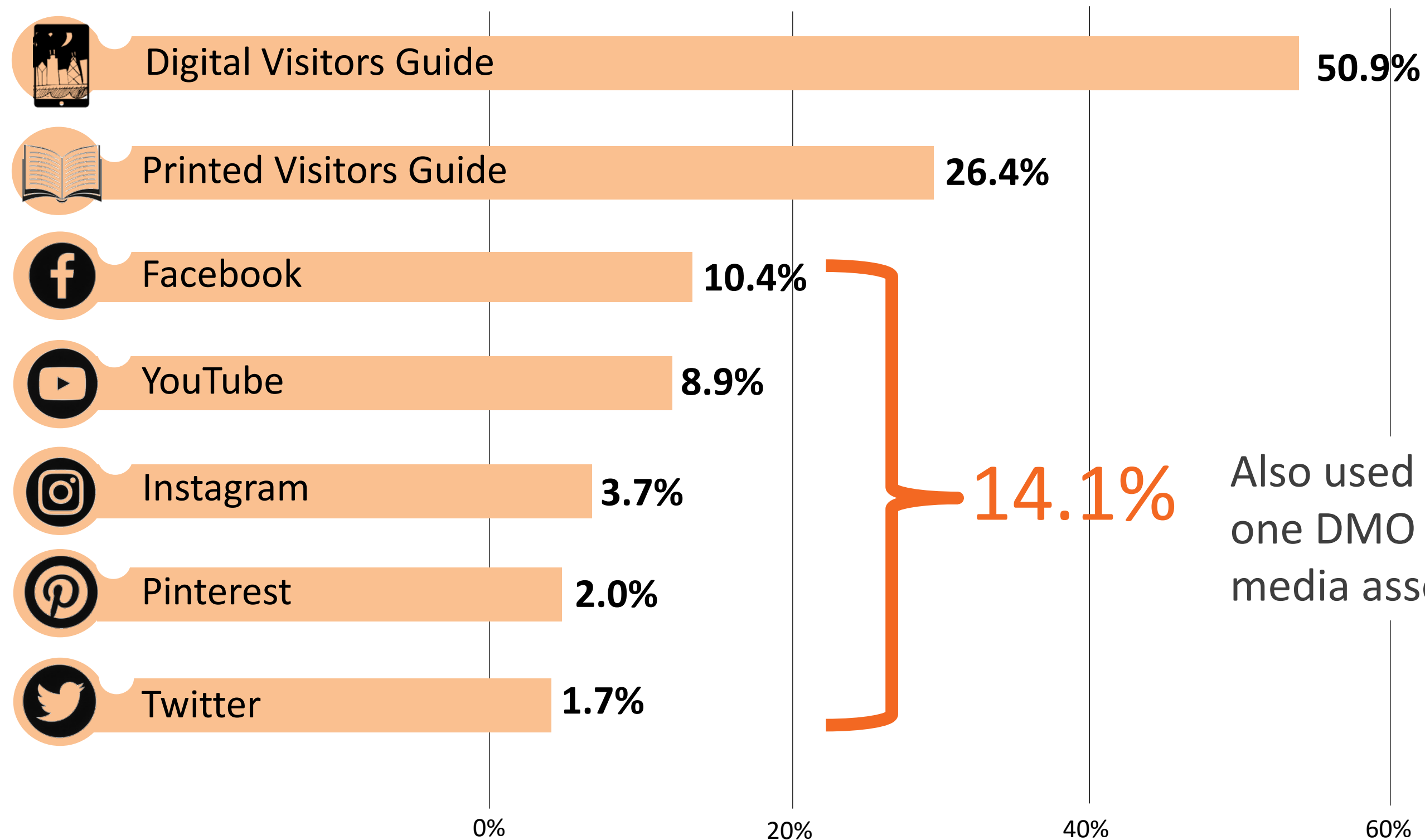
Spending Per Travel Party, Per Day
(Respondents who visited after using the website)

Average Daily Spend = $392

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.

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.

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Visiting DMO Website Users—Other DMO Resources Used

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

Resource	Percentage
Digital Visitors Guide	50.9%
Printed Visitors Guide	26.4%
Facebook	10.4%
YouTube	8.9%
Instagram	3.7%
Pinterest	2.0%
Twitter	1.7%

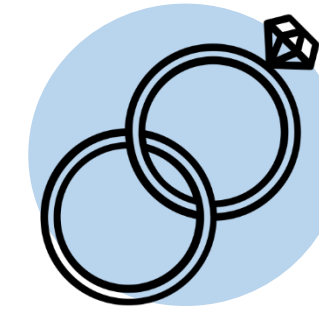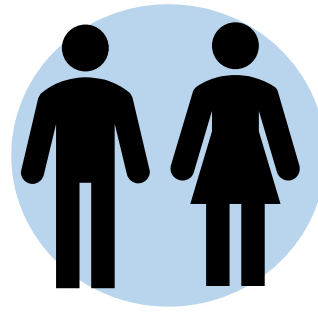**14.1%** Also used at least one DMO social media asset

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.

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.

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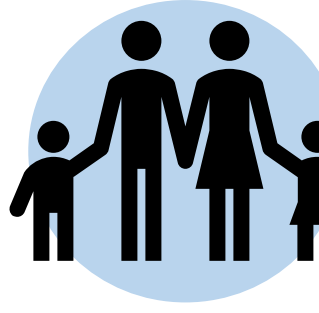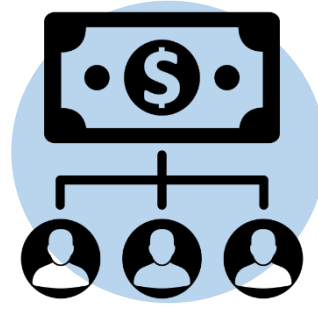# DMO Website Users—Demographics

Female – 65.0%
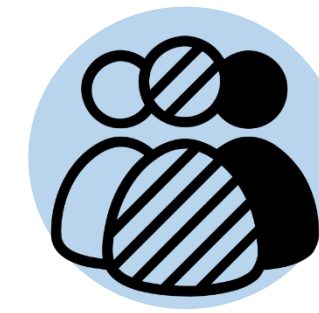Male – 34.3%

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%

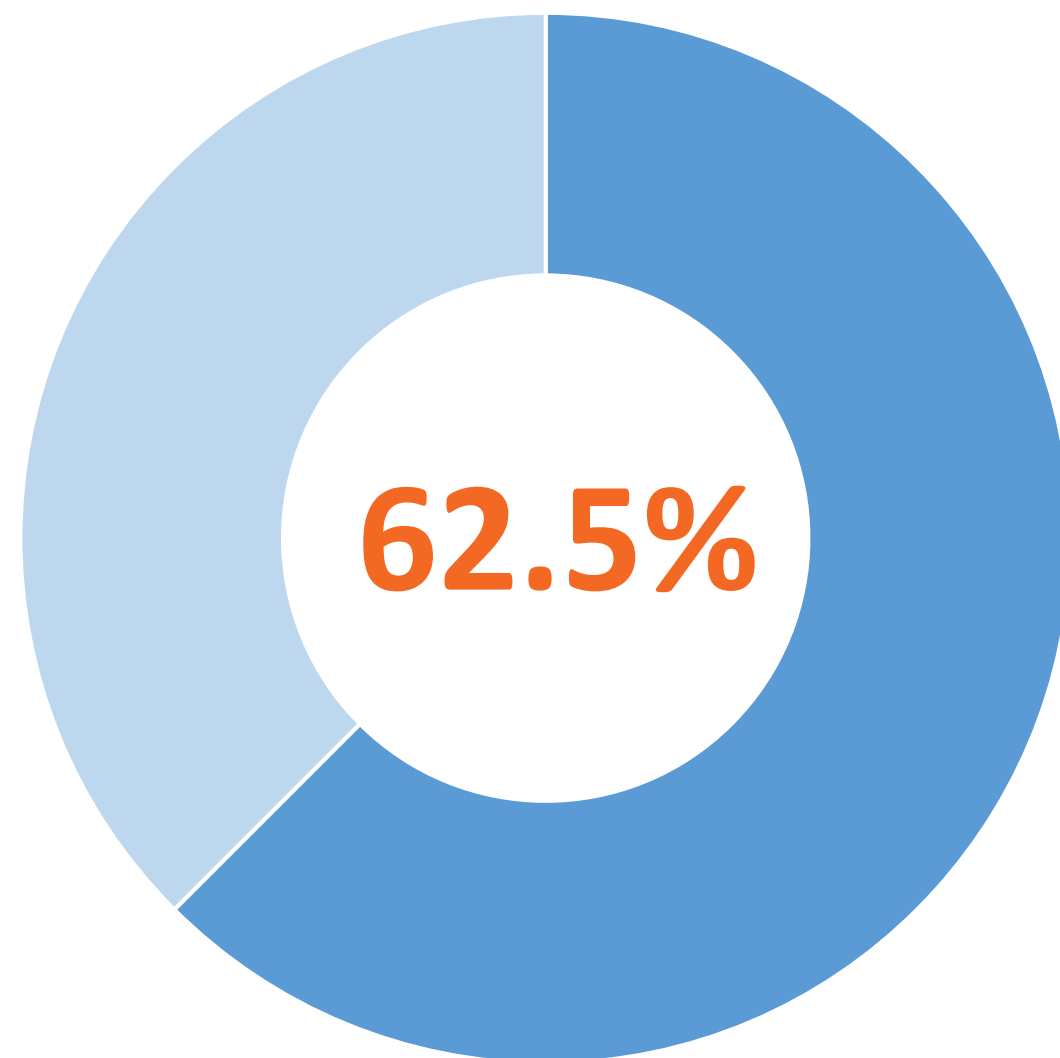Caucasian ethnicity – 74.6%
Non-Caucasian ethnicity – 25.4%

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

THE INFLUENCE OF DMO WEBSITES

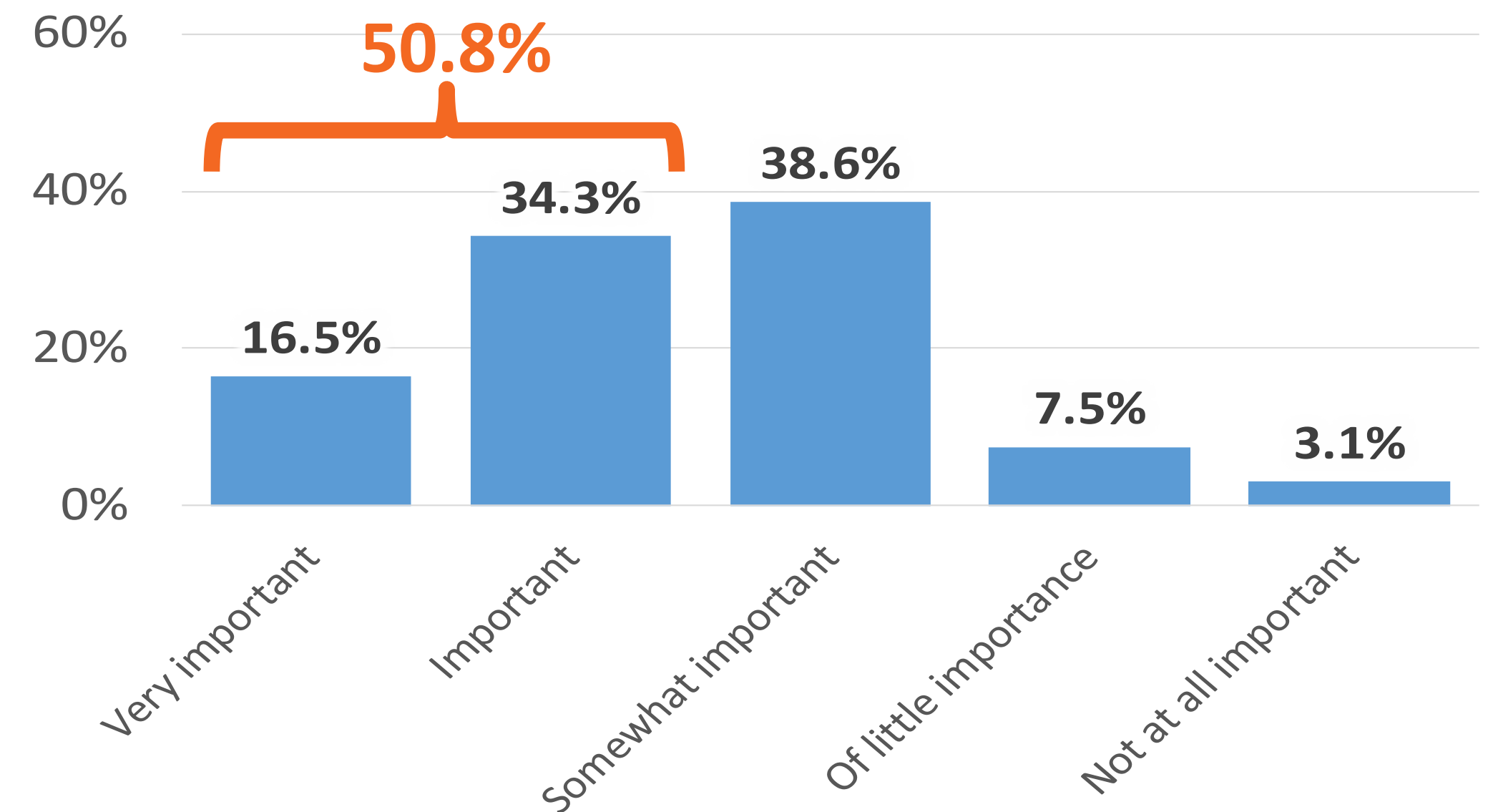# Impact of DMO Website on Destination Decision

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)

62.5%

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

50.8%

| 16.5% | 34.3% | 38.6% | 7.5% | 3.1% |

Very important | Important | Somewhat important | Of little importance | Not at all important

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.

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.

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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*)

Category	Percentage
Increased stay	67.4%
Neither	31.0%
Decreased stay	1.5%
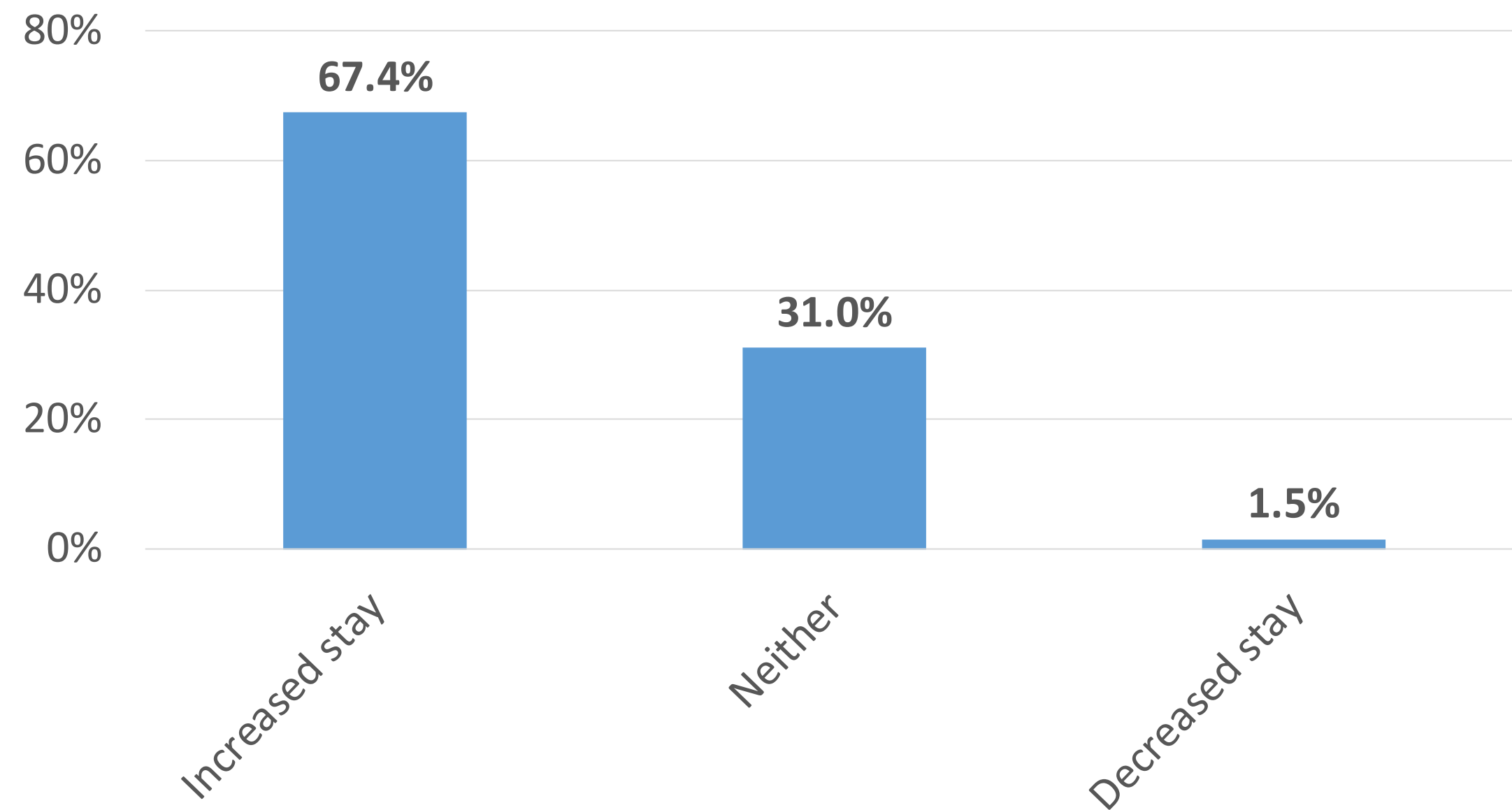
*Includes business or conference travelers, as well as leisure visitors, who reported that the website did not influence their destination decision but did influence their length of stay.

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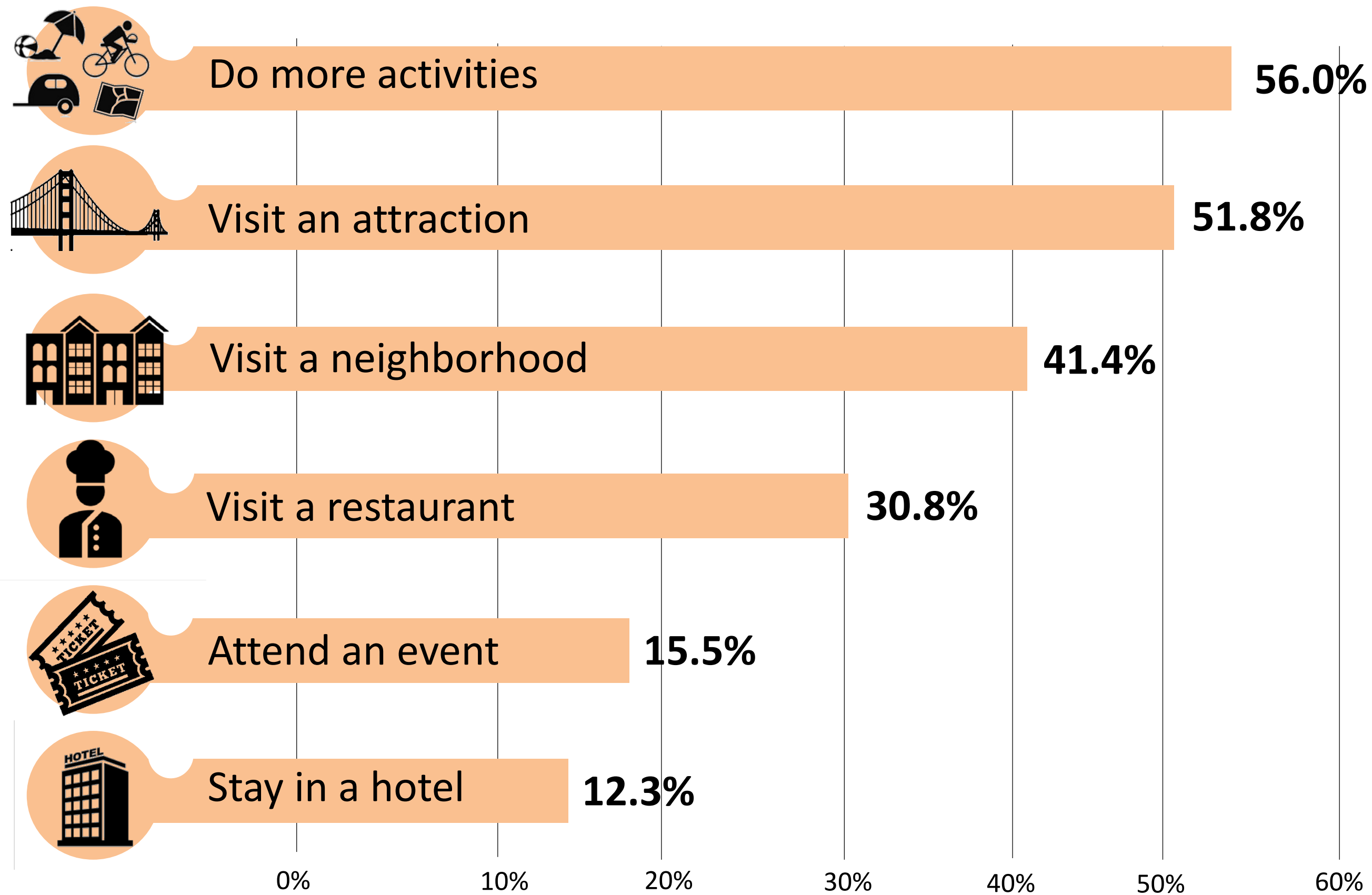
1.7 days
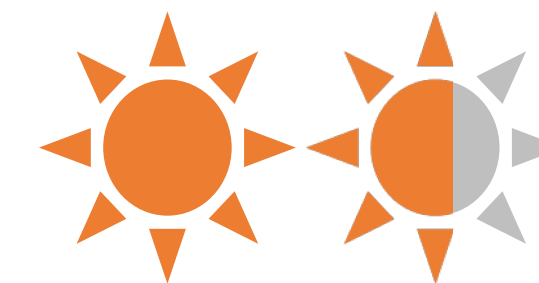
Question: How many days did you increase the length of your stay in [Destination] as a result of using our website?
Base: Visitors who reported that the website influenced their length of stay. 784 completed surveys.

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Trip Decisions Influenced by DMO Website

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

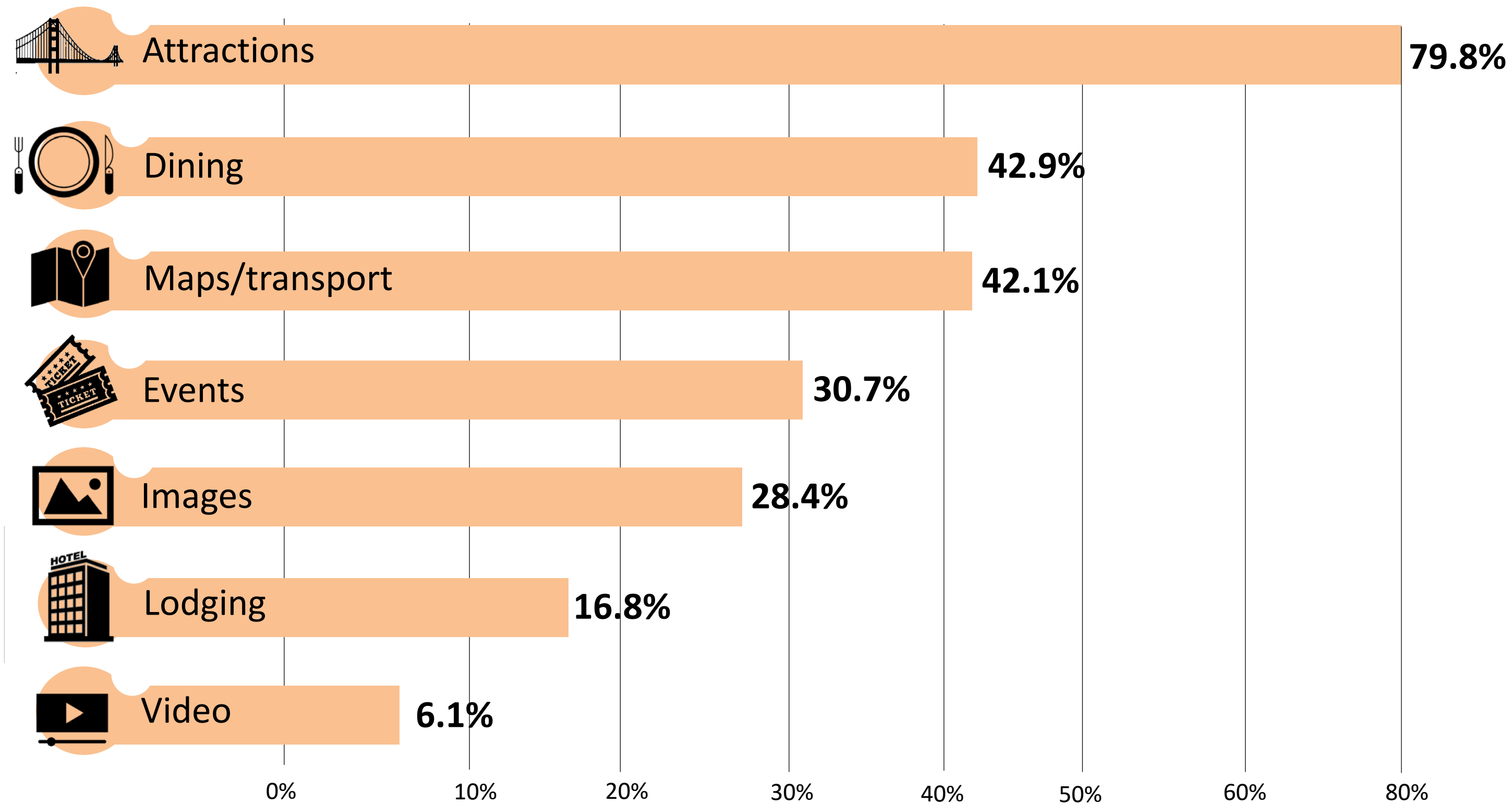| Decision	Percentage
Do more activities	56.0%
Visit an attraction	51.8%
Visit a neighborhood	41.4%
Visit a restaurant	30.8%
Attend an event	15.5%
Stay in a hotel	12.3%

0% 10% 20% 30% 40% 50% 60%

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.

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Most Influential DMO Website Content

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

Content	Percentage
Attractions	79.8%
Dining	42.9%
Maps/transport	42.1%
Events	30.7%
Images	28.4%
Lodging	16.8%
Video	6.1%

Content on DMO websites related to attractions and things to do in the destination is the most influential in converting users to visitors and/or in planning a visit to the destination. Website users who visited the destination—including those who said their trip decision was significantly impacted by the DMO website, those who lengthened their intended stay because of the DMO website and/or those whose trip decisions were influenced by content accessed on the website—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. Event information (30.7%) and the website's images (28.4%) are also motivational in getting DMO website users to actually make the decision to visit and/or in planning a visit to the destination.

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.

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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

★ ★ ★ ★ ★
★ ★ ★ ☆ ☆

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

Category	Percentage
Well-organized	54.5%
Communicated the destination	53.0%
Comprehensive	44.9%
Detailed	37.0%
Uncovers hidden gems	28.0%
Fun	22.6%
Inspirational	13.7%
Unique	8.0%

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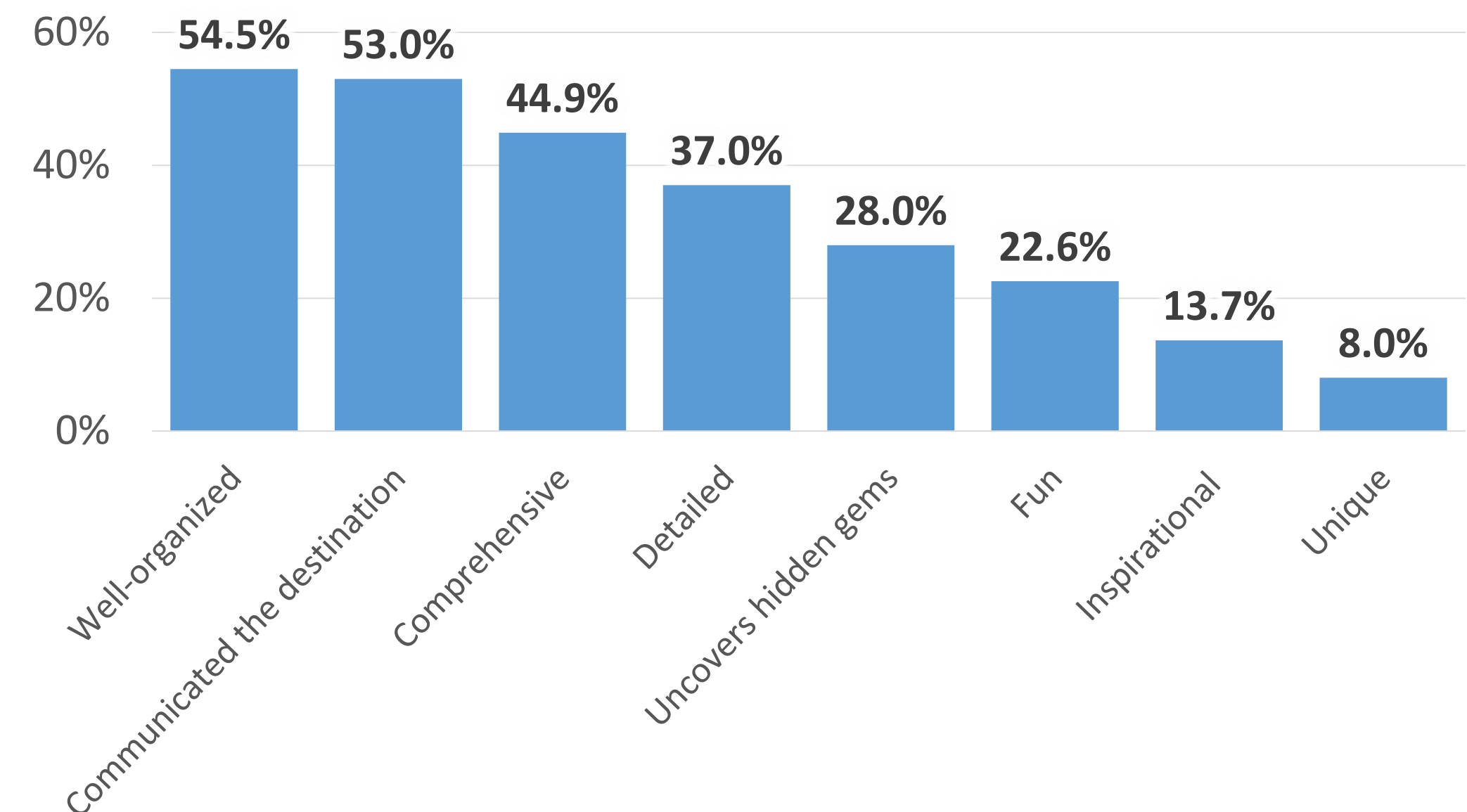
Question: Which of these words and phrases (if any) describe the content available on our website?
Base: Respondents who visited after using the website. 16,756 completed surveys.

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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 analytics findings of all participating DMO websites, weighted by web traffic during the period of study.

Decided

Interested

Considering

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THE AVERAGE DMO WEBSITE USER—BY TRAVEL PLANNING STAGE

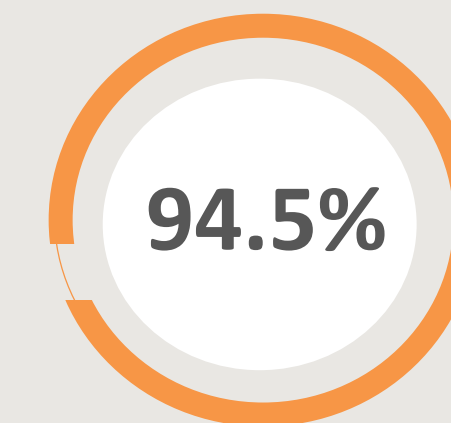| Average Number of Page Views	Average Session Duration	Percent of New Users

DECIDED
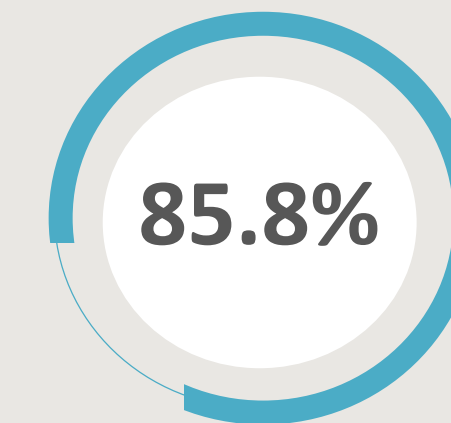
5.6 | 00:09:10 | 85.8% Of potential visitors who already decided to visit are new users

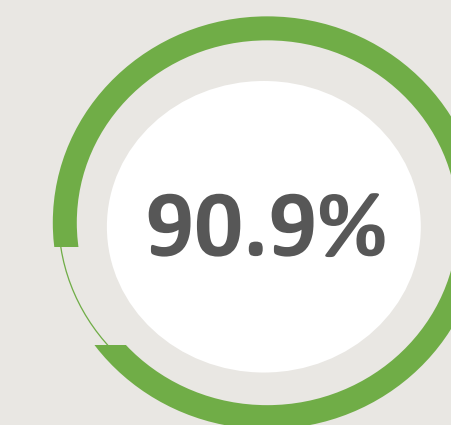## INTERESTED

4.9 | 00:08:24 | 94.5% Of potential visitors who are interested in visiting are new users

CONSIDERING

4.2 | 00:07:15 | 90.9% Of potential visitors who are considering travel destinations are new users

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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/Wine Tourism

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

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. These findings are based on the average website user, segmented by the device they accessed the site on:

- **Desktop users** accessed the website on a traditional desktop/laptop.

- **Mobile users** accessed the website on a mobile device.

This data was calculated by averaging the analytics findings of all participating DMO websites, weighted by web traffic during the period of study.
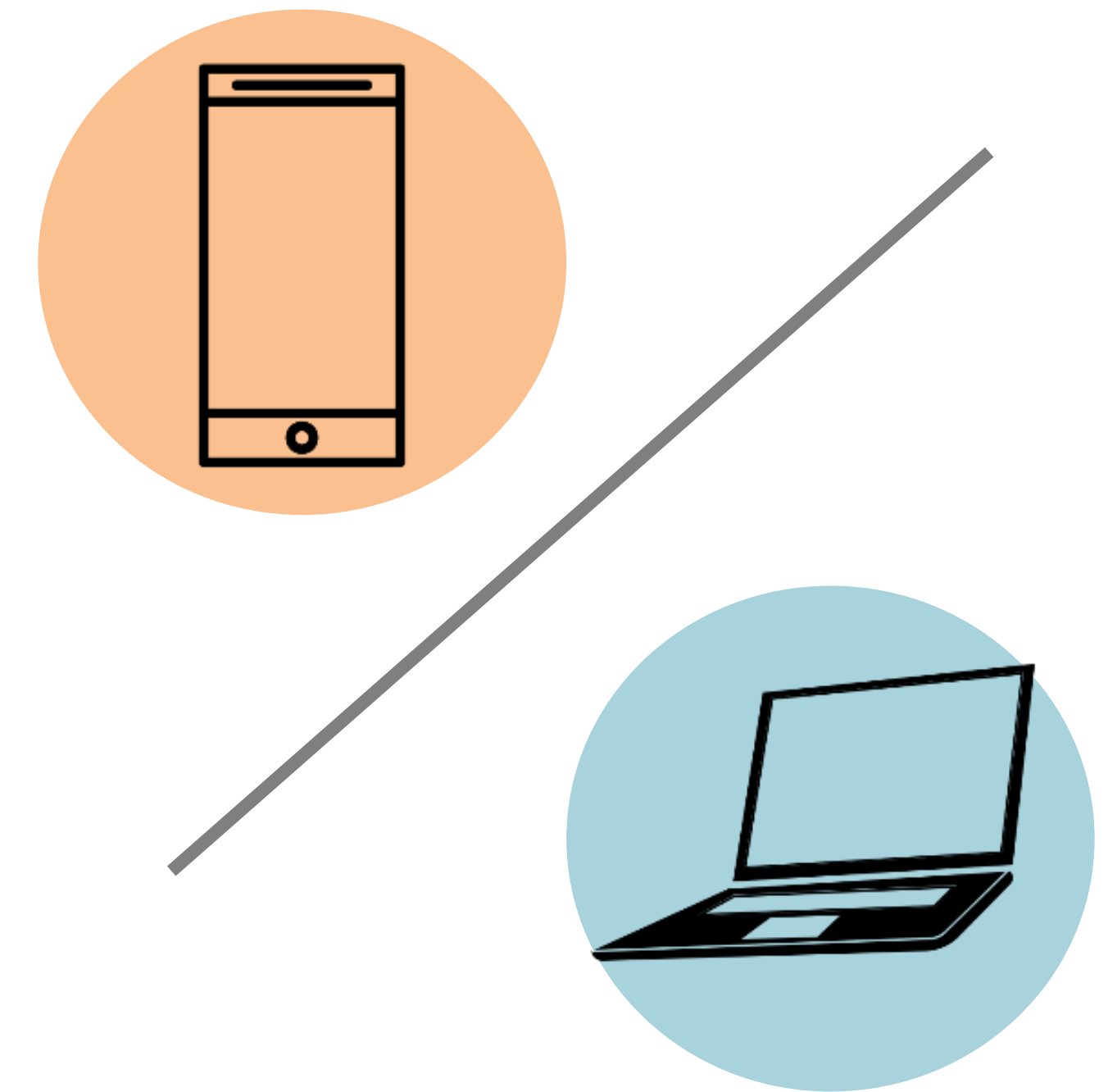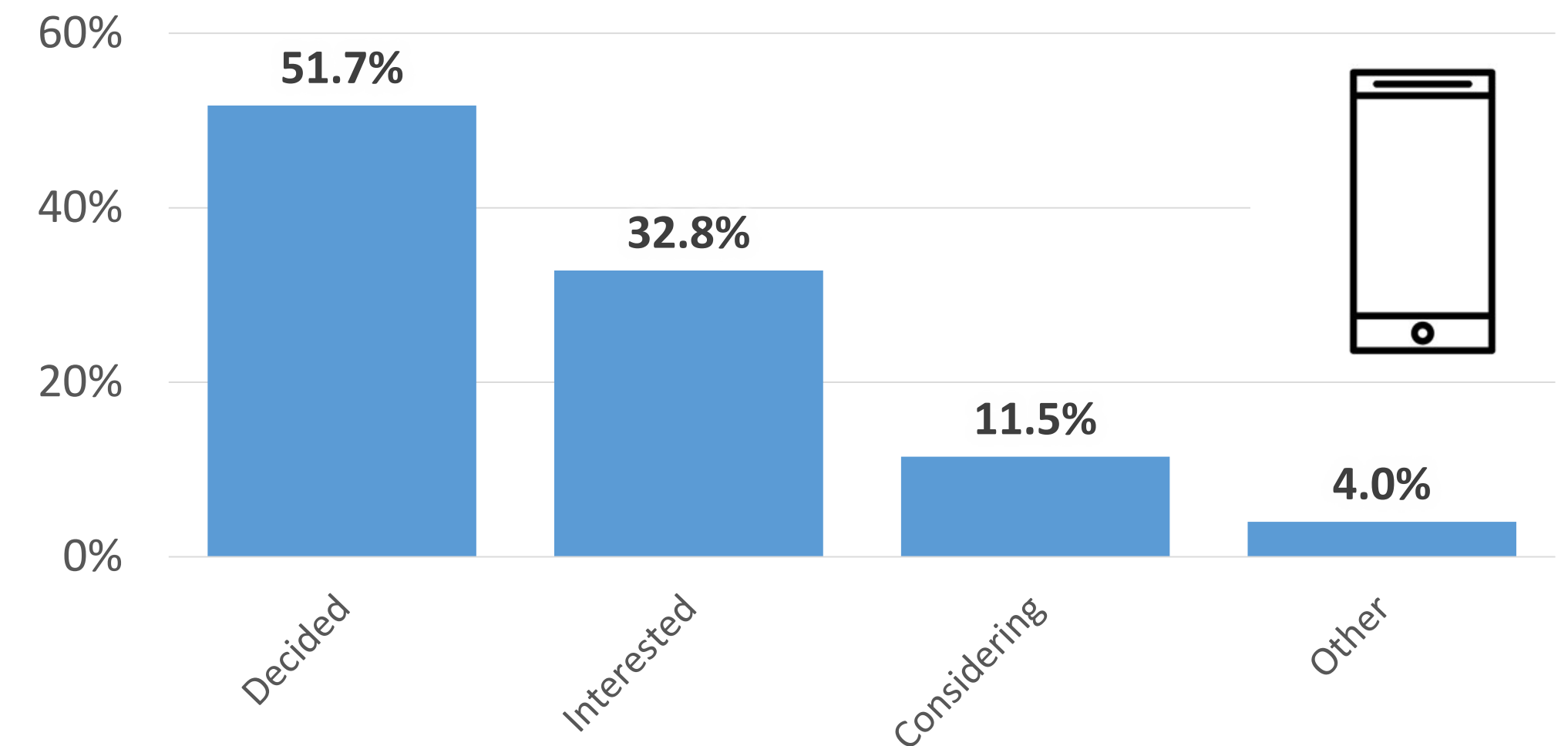
Point in Travel Decision Process—Desktop vs. Mobile Site Users

Website users gathering trip information on participating DMO websites on a mobile device are more likely to be subject to influence in making the destination decision. In total, 44.3 percent of DMO website users on a mobile device reported that they 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 reported being subject to influence. This aligns with the trend in which travelers tend to gather trip inspiration (high funnel) on a mobile device and complete travel transactions (low funnel) on a traditional laptop or desktop device.

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

	Decided	Interested	Considering	Other
	66.3%	24.3%	8.4%	1.0%
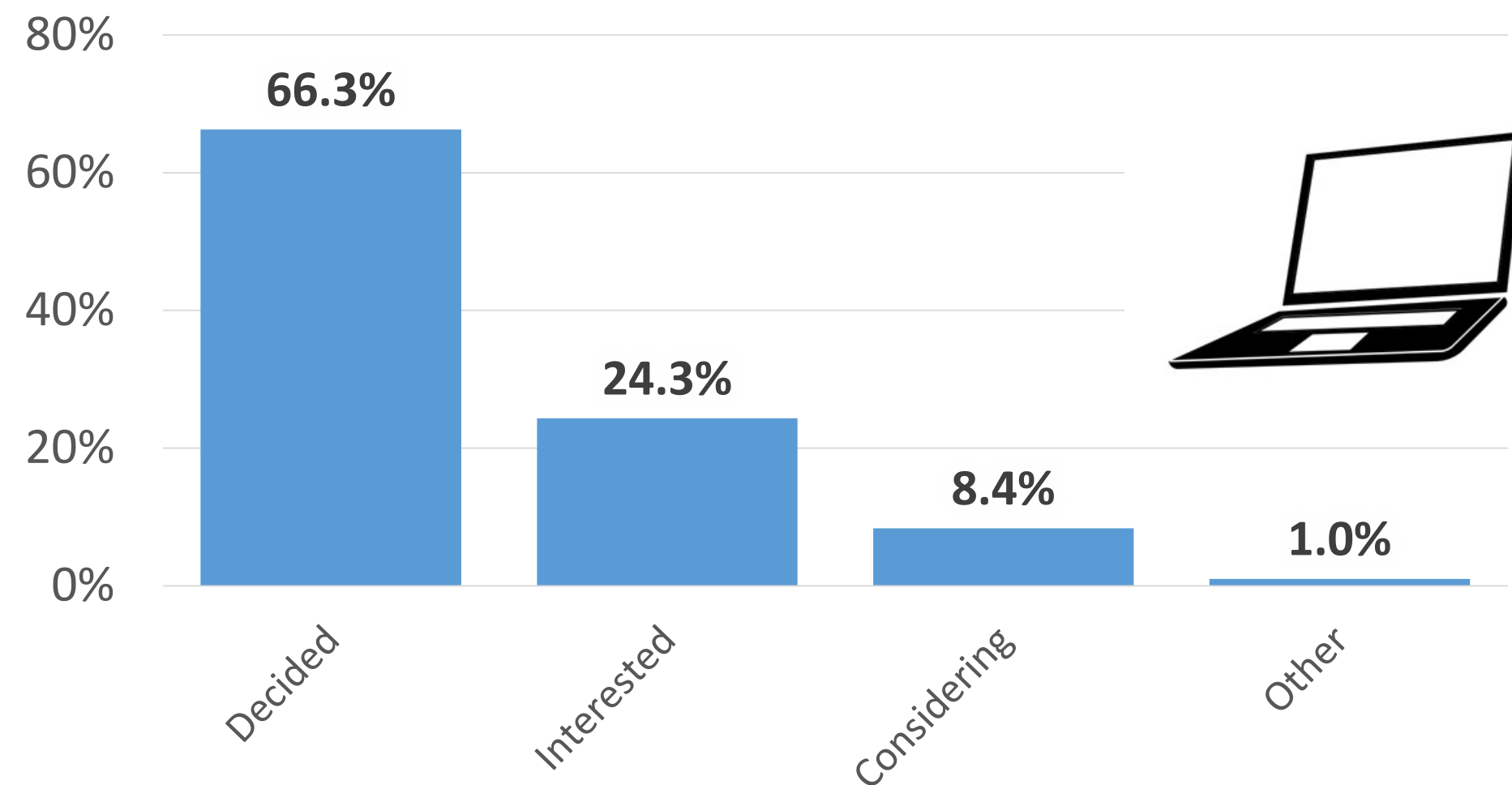
Point in Travel Decision Process—Mobile Users
(Respondents gathering information for a trip on a mobile device)

	Decided	Interested	Considering	Other
	51.7%	32.8%	11.5%	4.0%

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THE AVERAGE MOBILE & DESKTOP USER

Average Number of Page Views	Average Session Duration	New Users

MOBILE
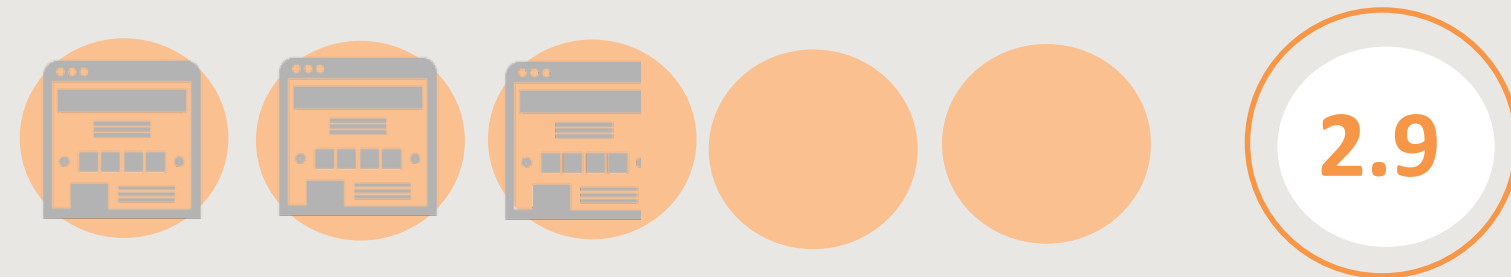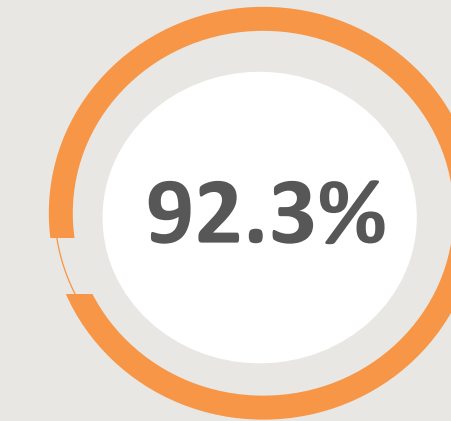
2.9	00:03:40	92.3% — Of mobile users are new users

DESKTOP
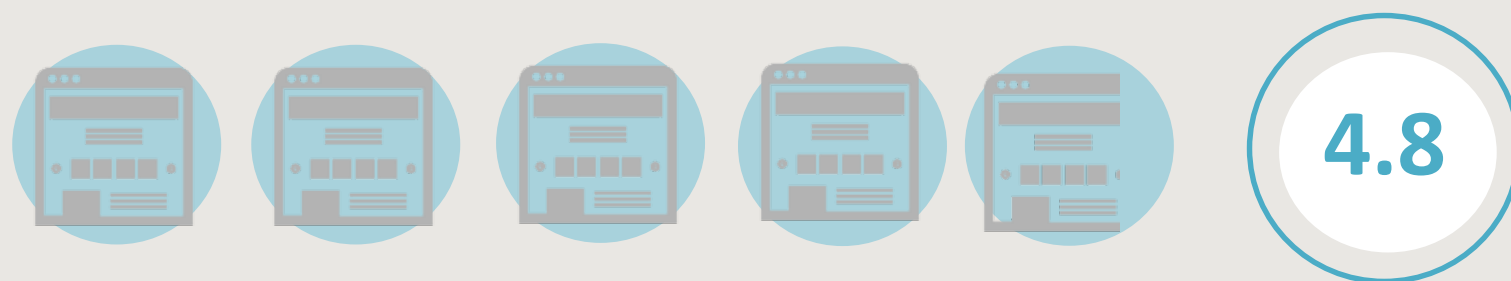
4.8	00:06:40	90.0% — Of desktop users are new users

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THE AVERAGE MOBILE & DESKTOP USER

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
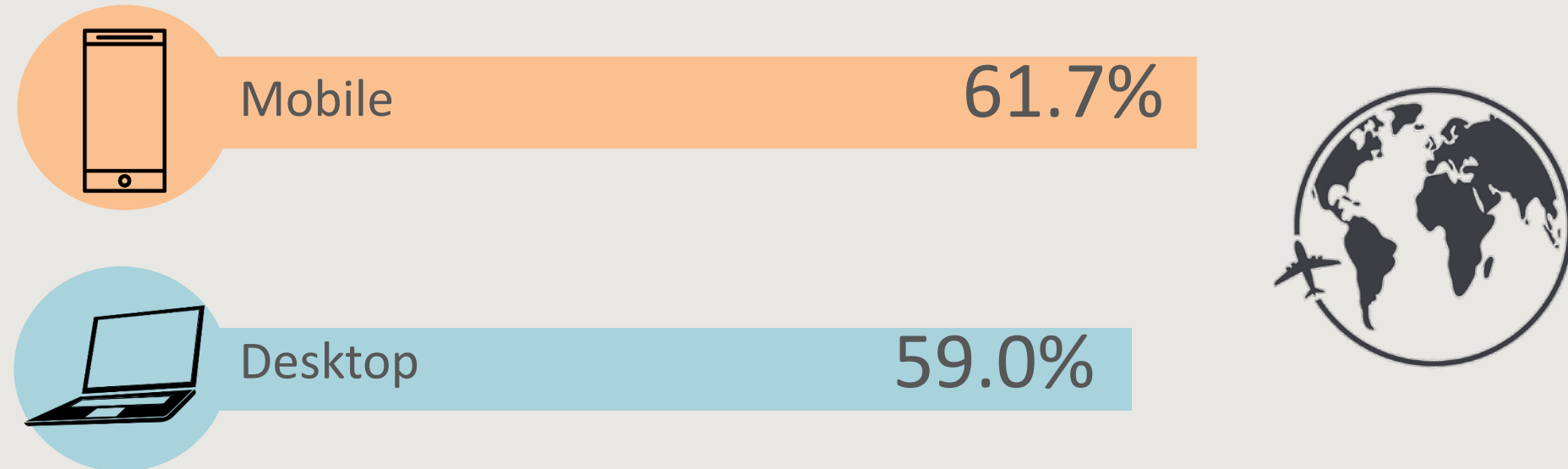Things to Do/Outdoor
Travel Guide & Newsletter Request

DESKTOP

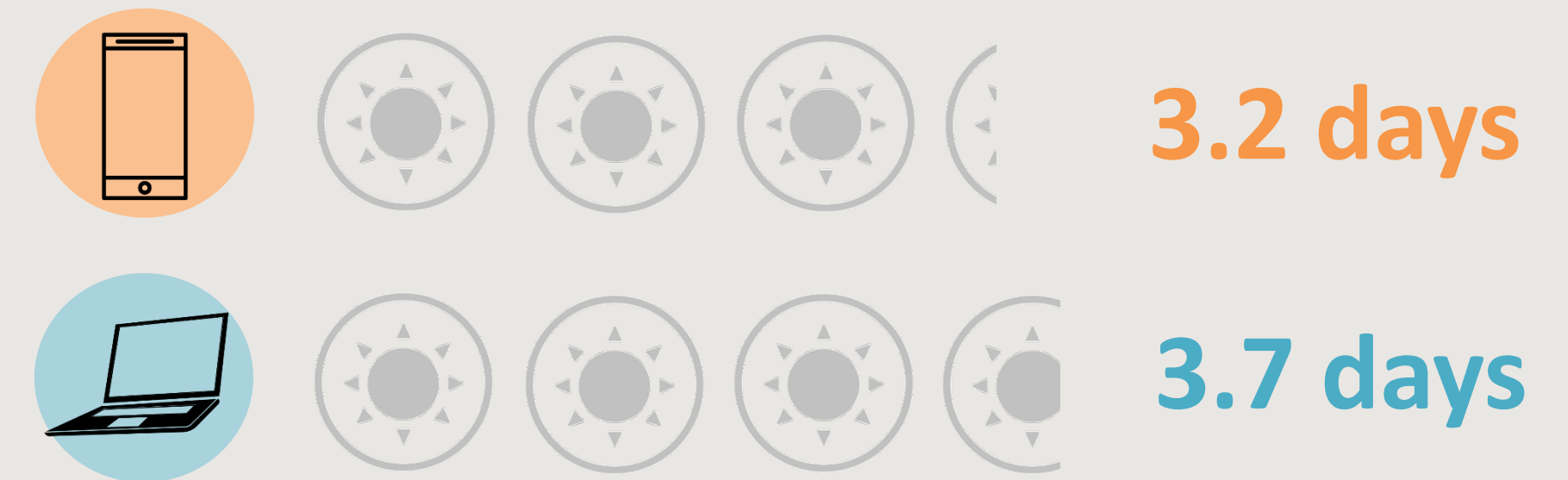|	
Organic Search (58.4%)	**Paid Search** (10.2%)
Direct (10.1%)	**Referral** (11.5%)

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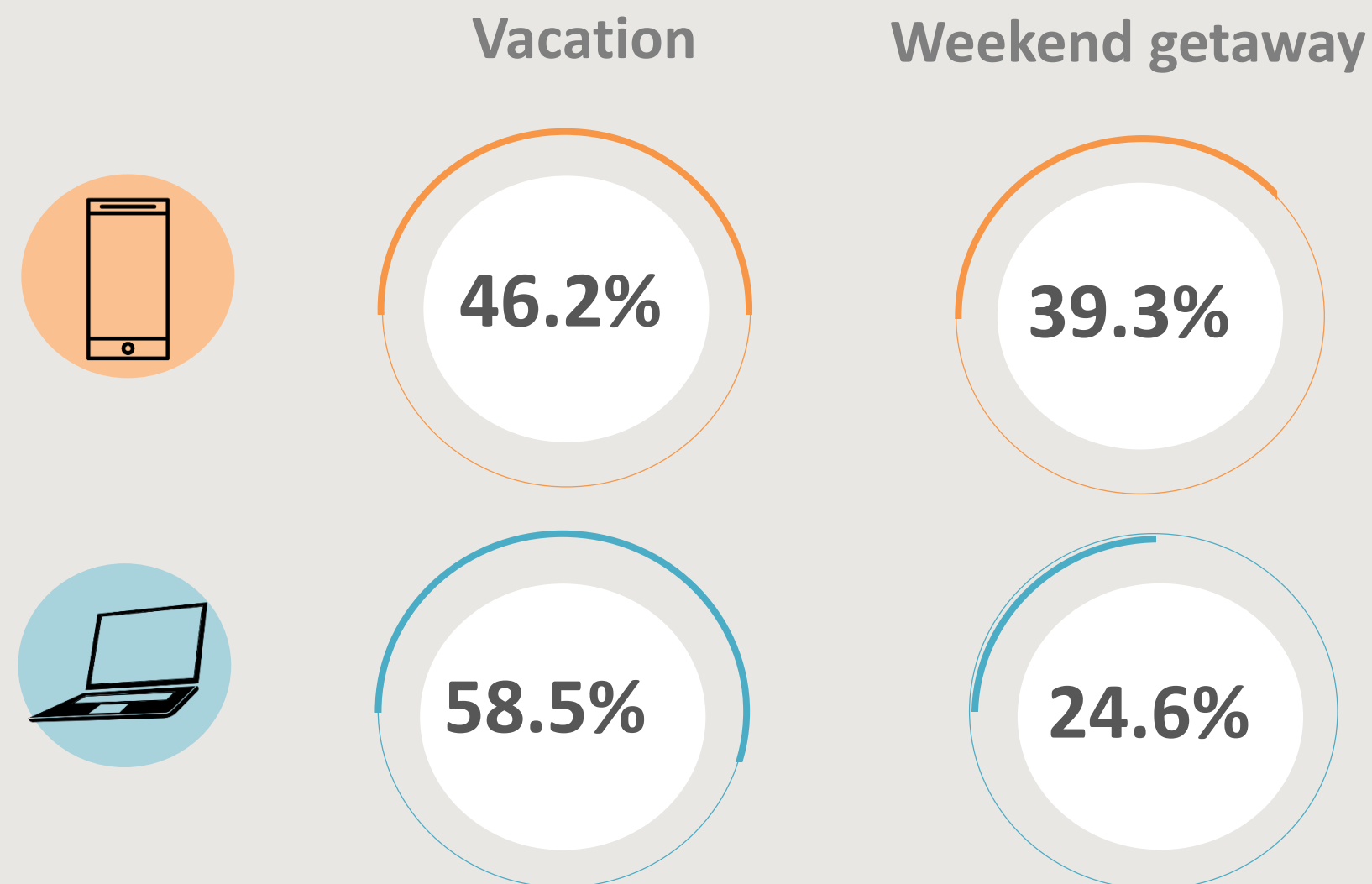Itineraries/Planning

THE AVERAGE MOBILE & DESKTOP USER

Percent Gathering Information for a Trip

Mobile 61.7%

Desktop 59.0%

Average Intended Length of Stay

3.2 days

3.7 days

Percent Planning a Vacation or Weekend Getaway

Vacation | Weekend getaway

46.2% | 39.3%

58.5% | 24.6%

Potential Visitors vs. Users Currently in Destination

In destination, 2.4%

Potential visitors, 97.6%

In destination, 1.1%

Potential visitors, 98.9%

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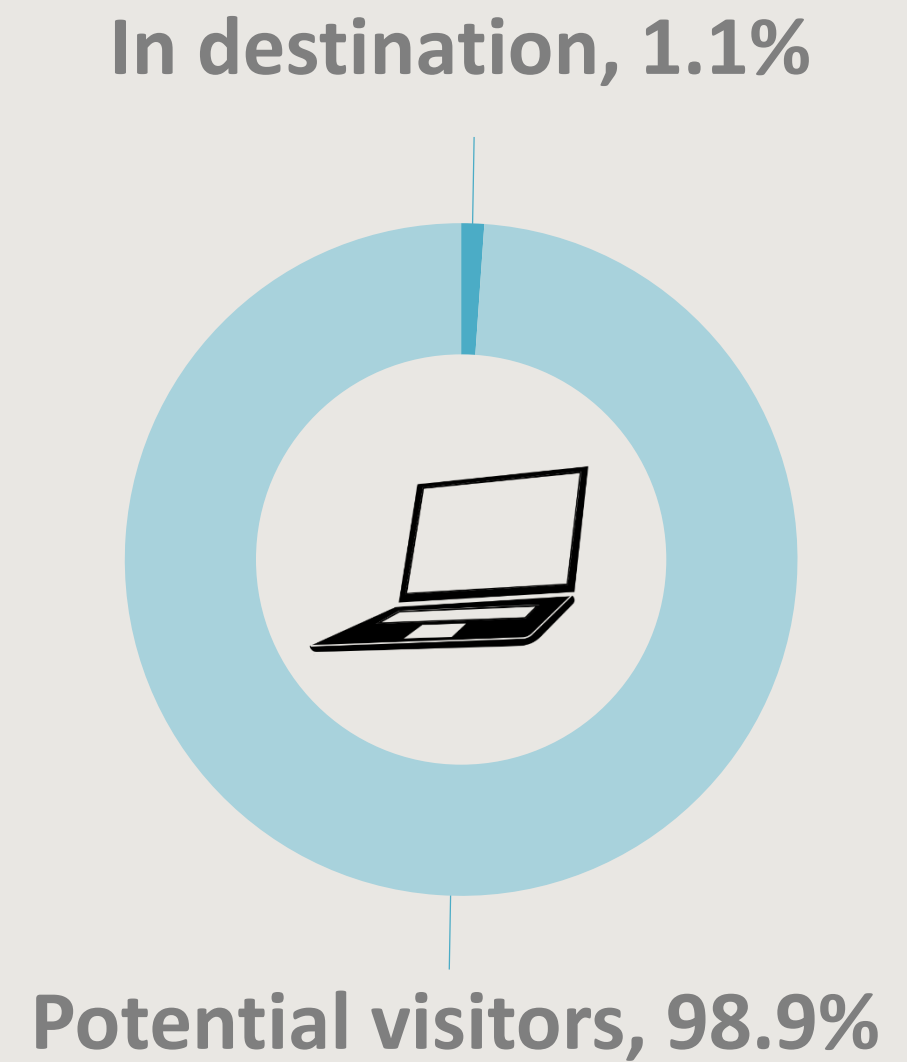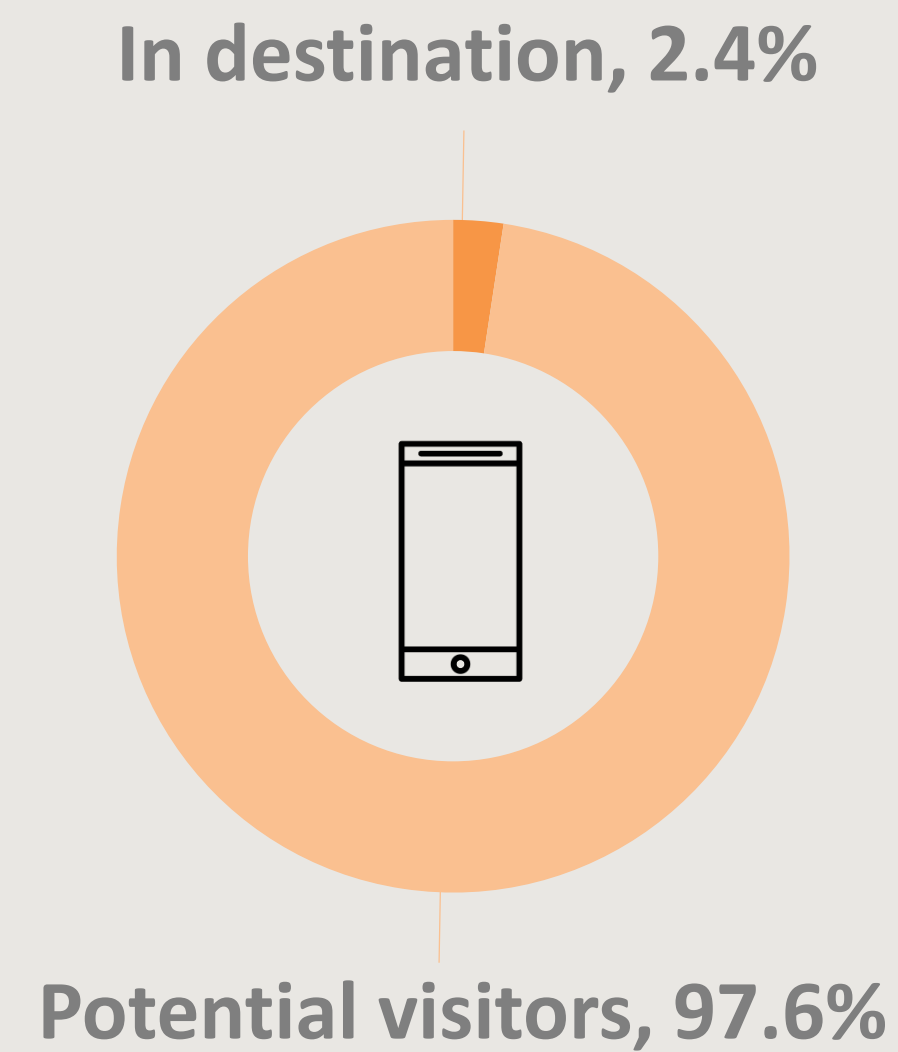
Website Use By Device—Key Findings

- On average, desktop users spend more time and view more pages on the DMO website compared to mobile users.

- Mobile users are more likely to be new users than desktop users.

- Mobile users are more likely to arrive at the site directly, while desktop users are more apt to arrive via referral and paid search.

- Mobile and desktop users view similar types of pages on a DMO website. Both of these users most view pages related to the Event Calendar, Things to Do, Itineraries/Planning and Travel Guide & Newsletter Request. Desktop users, however, also view Places to Stay pages while mobile users most view pages related to Things to Do/Outdoor.

- Similar proportions of mobile and desktop users use the DMO website to gather information for a trip.

- Compared to desktop users, mobile users are more likely to be planning a weekend getaway and intend to spend fewer days in the destination. Mobile users are more likely to be in the destination at the time of accessing the website.

How DMO Websites are Used:
The Average DMO Website User
by Generation

DMO Website Use By Generation

The following key findings and infographic summary present a high level view of insights derived from the analytics of all participating DMO websites. The key findings and figures that follow represent the average website visitor who completed the Website User Intercept Survey, segmented by generational age:

- **Millennials** are website users who reported being under age 36.

- **Gen Xers** are website users who reported being age 37 -52.

- **Baby Boomers** are website users who reported being age 53 or older.

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

Millennials

Gen Xers
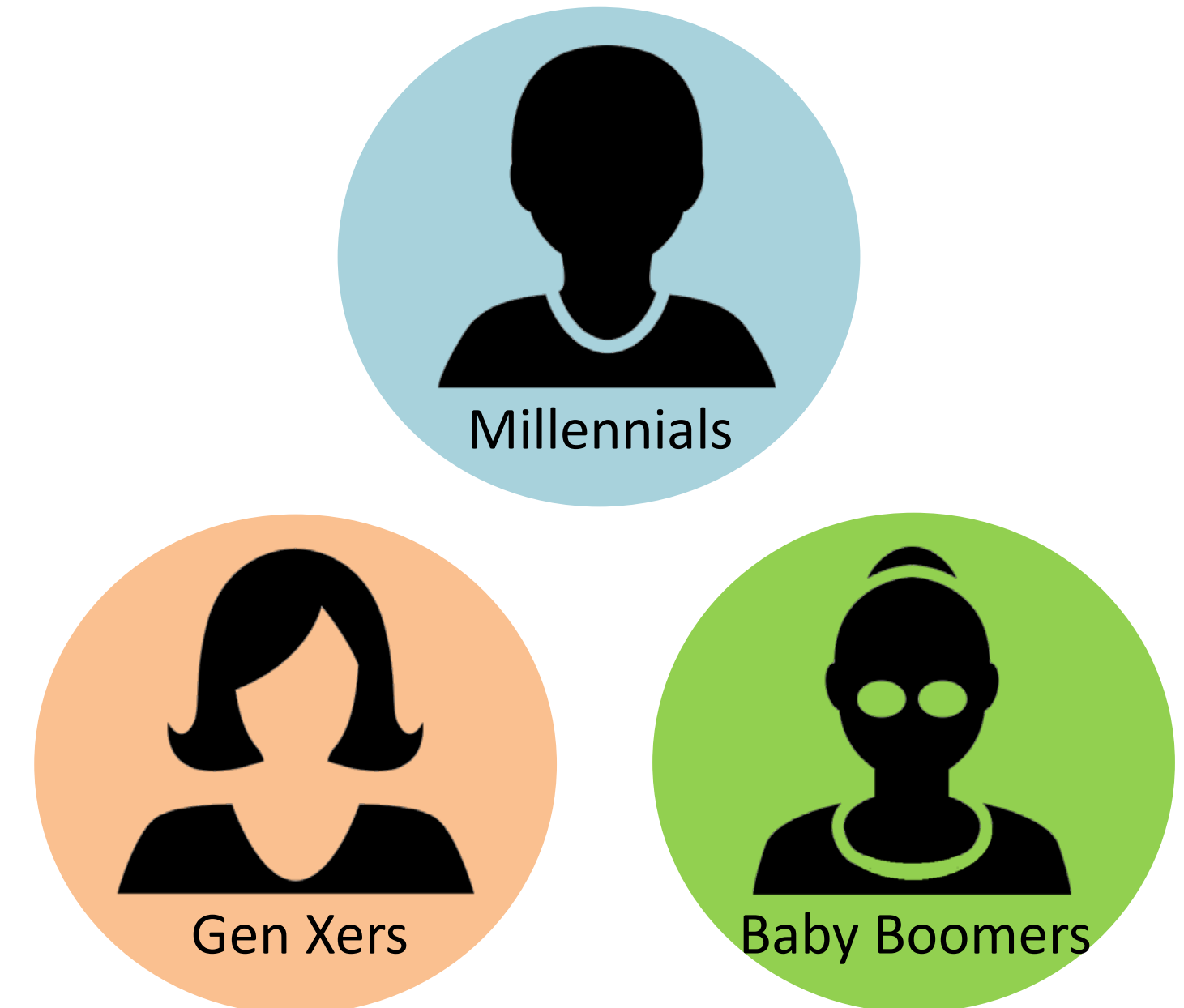
Baby Boomers

THE AVERAGE DMO WEBSITE USER—BY GENERATION

Average Number of Page Views	Average Session Duration	New Users

MILLENNIALS
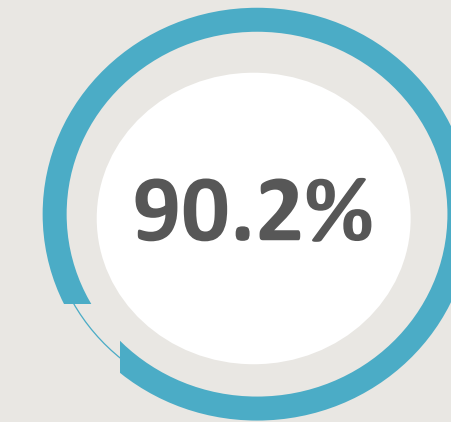
3.9   00:05:54   **90.2%** Of Millennial website users are new users

GEN XERS
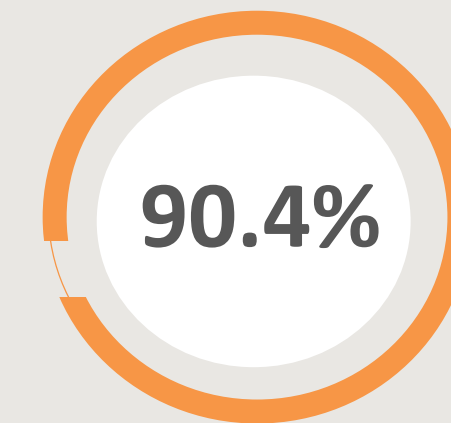
3.8   00:06:02   **90.4%** Of Gen X website users are new users

BABY BOOMERS
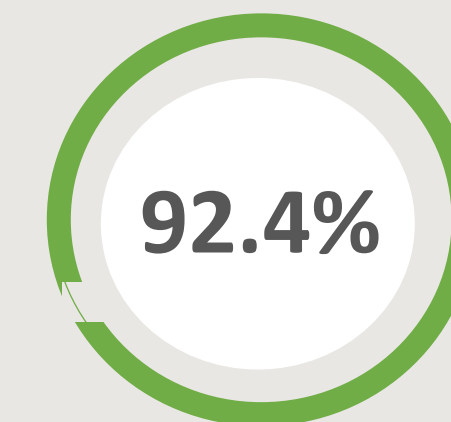
3.4   00:06:07   **92.4%** Of Baby Boomer website users are new users

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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/Outdoor
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 spend the least amount of time and view the most number of pages on DMO websites.

- Of the three age generations, Baby Boomers are most likely to be new website users.

- Baby Boomers are most apt to arrive at a DMO website directly, while Gen Xers are most likely to arrive via paid search and referral. Of the three age generations, Millennials are most apt to arrive at the site via organic search.

- All three generations most viewed the Event Calendar and Things to Do section. However, Millennials are more likely to view Things to Do/Outdoor pages, Baby Boomers are most apt to view the Map Request page and Gen Xers looked at Itineraries/Planning pages.

- The Event Calendar/Specific Event pages incurred high viewership amongst both Millennials and Gen Xers, while the Travel Guide & Newsletter Request pages were most viewed by Baby Boomers and Gen Xers.

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

Website Use By Residence

The following key findings and infographic summary present a high level view of insights derived from the analytics of all participating DMO websites. The key findings and figures that follow represent the average website visitor who completed the Website User Intercept Survey, segmented by potential visitors and local residents:

- **Potential Visitors** are website users who reported using the website to 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.
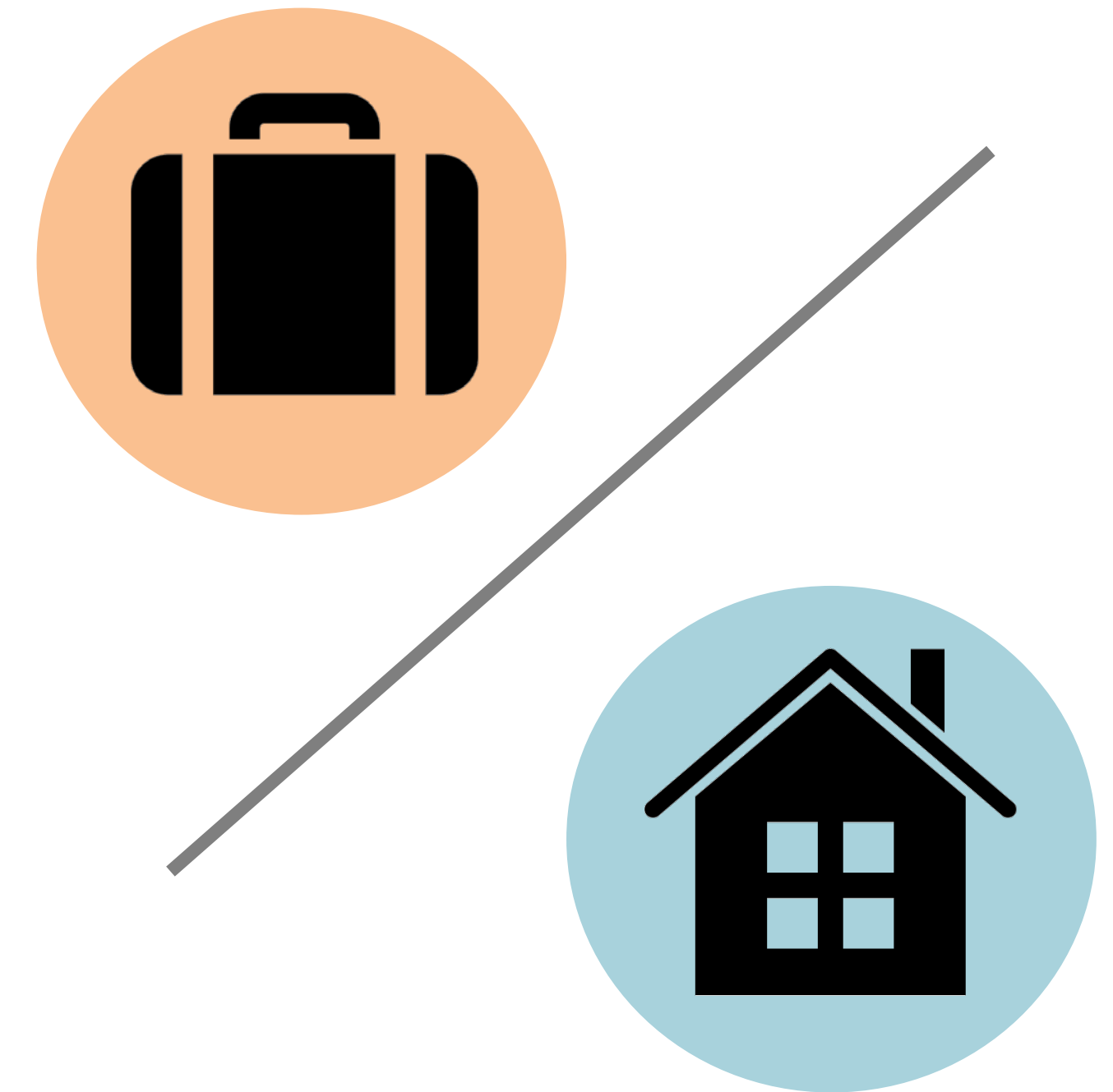
THE AVERAGE POTENTIAL VISITOR & LOCAL RESIDENT

Average Number of Page Views	Average Session Duration	New Users

POTENTIAL VISITORS
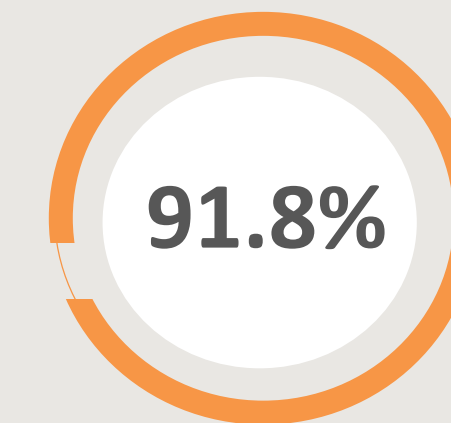
4.6   00:07:19   **91.8%** Of potential visitor users are new users

LOCAL RESIDENTS
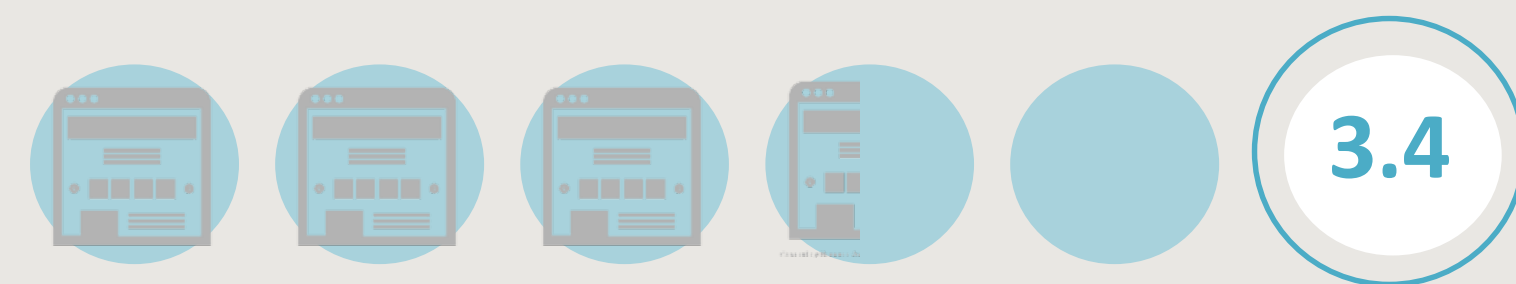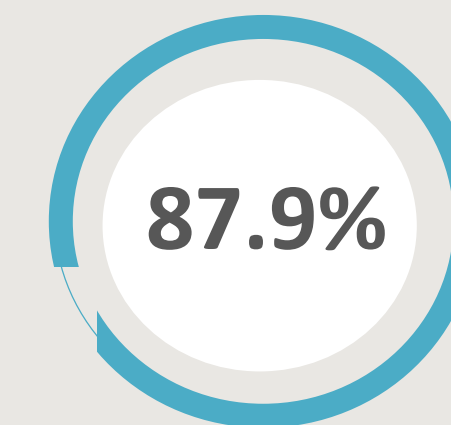
3.4   00:13:36   **87.9%** Of local resident users are new users

THE AVERAGE POTENTIAL VISITOR & LOCAL RESIDENT

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/Trails & Hiking
Itineraries/Planning

Website Use By Residence—Key Findings

- On average, potential visitors spend less time and 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 to the destination.

- Both potential visitors and local residents commonly view pages related to the Event Calendar, Things to Do, and Itineraries/Planning. Potential visitors however, are more likely to view Travel Guide & Newsletter Request and Map Request pages, while local residents are more likely to view pages related to specific types of activities, including Event Calendar/Specific Event and Things to Do/Trails & Hiking.

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How DMO Websites are Used:
The Average Website User
by User Type

DMO Website Use By User Type

The following key findings present a high level view of insights derived from the analytics of all participating DMO websites. The key findings that follow represent the average website visitor who completed the Website User Intercept Survey, segmented by user type:

- **Potential Visitors** are website users who reported using the website to plan a trip.

- **Meeting Planners** are website users who identified as a meeting, event or wedding planner and reported using the 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.

Potential Visitors

Meeting Planners

Journalists

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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.

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 conservatism 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**

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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.

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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	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	Total visitor spending on trips extended by website	Total economic impact/ROI of the website	Total economic impact/ROI of the website per real, new website user	Roomnights generated
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

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