DMO WEBSITE Importance study

A cooperative research study of 60+ official DMO Websites

Final Report of Findings February 2021

Destination Analysts

RESEARCH CONDUCTED FOR THE DMO INDUSTRY BY DESTINATION ANALYSTS, INC.



IN GRATITUDE TO MILES PARTNERSHIP, WHOSE SUPPORT MADE THIS RESEARCH POSSIBLE



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RESEARCH OVERVIEW & OBJECTIVES

Destination 🔶 Analysts

To benchmark the critical role Destination Marketing Organizations play during an active crisis like the coronavirus pandemic and measure the value of their communication assets, Destination Analysts conducted a cooperative research study of the users of over 60 DMO websites. This study is the largest ever of its kind, and is designed to provide important insights into the audiences that the DMO serves—from local businesses, residents, and media, to potential visitors, meeting planners and the travel trade—and the expansive amount of content the DMO is asked to provide. Each participating DMO has received their own exclusive data.

This report presents the final aggregate findings from this study based on the data collected for all participating 60+ DMOs.

METHODOLOGY

This research utilizes a website intercept survey methodology. Upon arriving on the website, a survey appears requesting site visitors to answer a few questions. The survey questionnaire looks into topics such as website users' motivations for visiting the site, as well as the specific types of content sought.

A total of 256,346 surveys were collected between May – December 2020.

Data weighting: When examining combined data from multiple official tourism websites, it is important to note that State tourism office websites and websites of different sized DMOs experience different levels of user traffic due to a variety of factors. Data presented within this report describing the average website user was weighted to account for these different levels of user traffic. With this weighting plan, the data accurately reflects the overall population of DMO website users.

METHODOLOGY

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



Website User Intercept Survey

Intercept Survey of Website Audiences:

- Potential Visitors
- Local Residents
- Local Businesses
- Meeting Planners
- Travel Trade
- Media/Journalists

Google Analytics

Data Collected For Each Website Audience:

- Reasons for visiting DMO site
- Information sought
- Website analytics/behavior
- Metrics for measuring the importance of DMO Websites

The following page presents the 60+ DMOs who participated in this groundbreaking industry research.



DEFINITIONS

In the remainder of this report, data from the survey findings is broken out by website user segments. The following terms are frequently used, and should be considered as defined below:

- Local Businesses are respondents who represent a local business.
- Local Residents are respondents who currently live in the destination.
- Potential Visitors are non-local website users who reported they are gathering information for a planned or potential trip or are looking for travel inspiration.
 - Decided Users are potential visitors who already made the decision to visit the destination when they accessed the website.
 - o Interested Users are potential visitors who were interested in the destination when they accessed the website but have not yet made any firm travel plans.
 - Considering Users are potential visitors who were simply considering destinations for a leisure trip when they accessed the website.
- Non-Local Professionals are non-local website users who reported they are gathering information for professional reasons.
 - Meeting Planners are meeting or event planners visiting the website for professional reasons.
 - Travel Trade are travel agents or tour operators visiting the website for professional reasons.
 - Media/Journalists are journalists visiting the website for professional reasons.
- State Tourism Offices (STO) are tourism offices that work to promote travel and tourism within a state.
- Urban-leaning DMOs are destination marketing organizations that represent an urban destination (a city or metropolitan area).
- Rural-leaning DMOs are destination marketing organizations that represent suburban or rural destinations.
- Millennials are respondents between the age of 24 39.
- Gen Xers are respondents between the age of 40 55.
- **Baby Boomers** are respondents between the age of 56 74.



Destination Marketing Organizations: An Important and Valuable Resource to Many Audiences

A diverse set of people use the communication assets DMOs maintain, including their official websites—from those that represent significant economic generation potential like travelers, meeting planners, the travel trade and media, to those that foster the heart of the community, like local businesses and active residents.

Across these audiences, the DMO website is seen as valuable, with an average score of 7.9 on a 10-point scale. It is also seen as important that the DMO is available to offer the information that it does on its website: 80.8 percent of DMO website users surveyed agreed that it was "important" or "extremely important" that the organization provided the information it did.



DMO websites are seen as valuable, averaging a score of 7.9 on an 11-point scale.



Agree that it is "important" or "extremely important" that DMOs provided the information it does on its website.



DMO Websites: An Engine for Economic Impact and Unmatched Resource for Visitors During a Crisis

Over two-thirds (68.3%) are upcoming or potential visitors

On average, over two-thirds (68.3%) of a DMO's nonresident site traffic is comprised of upcoming or potential visitors to the community they represent.



While over half of these travelers have already made their decision to visit, approximately 4-in-10 (44.9%) are still in a state of potential influence—highlighting the significant opportunity DMOs can capitalize on to convert these travelers into actual visitors and create significant economic impact for their community. Approximately 4-in-10 (44.9%) can be influenced by the website to visit the destination



DMO Websites: A Central Source Potential Visitors Access for Current Information

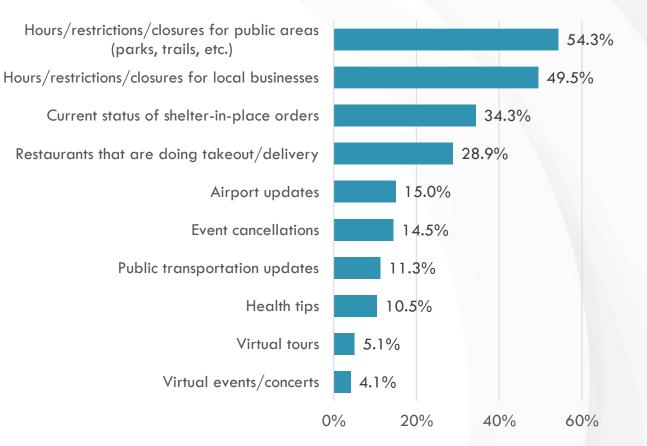
The current coronavirus pandemic illuminates how DMO websites serve as the singular central source for information of key importance to potential visitors.

Nearly one-third of site users who are potential visitors to the DMO's community are specifically interested in local COVID-19 information/resources/response. These travelers are most commonly looking for up-to-date operational hours/restrictions, closures of public areas and local businesses, and the current status of shelter-in-place orders, which the DMO can offer in one centralized place.



Of potential visitors are specifically interested in local COVID-19 information/resources/response.

COVID-19 Information Sought (% of all Potential Visitors)



DMO Websites: A Valuable Service to Local Businesses & Residents

In addition to being rated as important, DMO websites provide a valuable service to their local business community and residents during a crisis like the coronavirus pandemic.

With a focus on tourism recovery, local businesses are turning to the DMO not only for content to promote tourism to their community, but advocacy and information related to supporting local businesses. Residents are most commonly coming to DMO websites looking for ideas, activities and things to do while practicing social distancing and researching activities for themselves and/or local family and friends: information which encourages economic activity. "Local businesses like mine use this site to go the extra mile and ensure that both locals and visitors feel comfortable and confident visiting our beautiful town. I have heard nothing but positive feedback from visitors!" — Local Business

"Tourism is an important and growing sector for our area, and I love directing our guests to this website for more things to do! Keep that information current. Thank you for everything you do!"

- Local Business

"Hope you all are doing well during this challenging time! We have loved being outdoors during COVID and these kinds of websites have helped us find adventure in our home state!"

– Local Resident



DMO Websites: A Beneficial Resource that Supports Meeting Planner Professionals

Similar to potential visitors, local residents and local businesses, travel professionals turn to DMO websites for critical destination information. Meeting planners of which a majority are currently considering the destination whose website they access for an upcoming program—express the most interest in destination information on hotels. In addition, restaurants/dining and COVID-19 resources are amongst meeting planners' top destination content of interest.

Specific to COVID-19 resources, meeting planners commonly look for up-to-date operational hours for both local businesses and public spaces, as well as the current status of shelter-in-place orders. Airport updates, which are important to planning meetings and events, are much more sought by meeting planners compared to other website user segments.

Destination Content of Interest (% of all Meeting Planners)

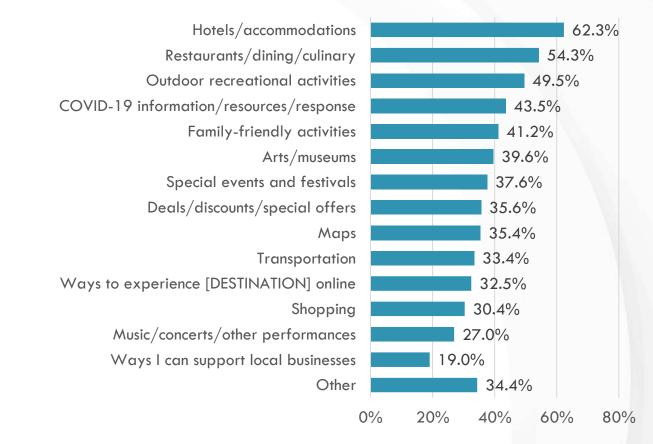


DMO Websites: A Helpful Source to Develop Itineraries for Travel Trade Professionals

The vast majority of travel trade professionals who use DMO websites are considering the respective destination for a tour package or itinerary. As such, content that would potentially help in the development of itineraries—hotels and accommodations, restaurants and outdoor recreation—are key, with half or more of travel trade who report being most interested in these specific types of information.

Amongst professional segments who access DMO websites for work purposes—meeting planners, travel trade and media/journalists—travel trade gave the DMO the highest ratings for importance and value. In total, 85.5 percent consider it important that the DMO offer the information available on the site and gave the DMO website an average value rating of 8.5 on an 11-point value scale.

Destination Content of Interest (% of all Travel Trade)



DMO Websites: A Source of Inspiration and Ideas for Media/Journalists

Media/journalists, another professional segment that represents potential economic generation for destinations, use DMO websites in search of media-related content. Story ideas and information on what's new in the destination are content types that media/journalists most commonly look for on these sites. These, along with photos and videos, could very well contribute to a destination's earned media coverage and ultimately influence incremental visitation.

Media-Related Information Sought (% of all Media/Journalists)

Story ideas	45.9%
What's new in [DESTINATION]	39.0%
Photo/video library	30.8%



Website Analytics: Integrating Survey Data with Actual Site Behaviors Local Residents and Potential Visitors

On average, potential visitors view slightly more pages per session and spend more time on DMO websites compared to local residents.

In addition to their higher propensity to be new users of DMO websites, potential visitors are also more likely than local residents to arrive at these sites through paid search.

(Average by Potential Visitor & Local Resident Users) Average Number of Pages **Average Session Duration** 6:52 7:27 3.26 4.14 Local Residents Local Residents **Potential Visitors Potential Visitors Channels Driving Traffic** (% of Potential Visitor & Local Resident Users) Local Residents Potential Visitors 69.5% **Organic Search** 60.8% 12.3% 11.3% Direct 5.8% Paid Search 14.4% 5.5% 6.2% Referral 3.4% Social 3.0% Email 0.6% Display 0% 20% 40% 60% 80%

Destinatio

Website Analytics

Website Analytics: Site Behavior of Local Residents by Destination Type

The average number of sessions is highest for residents who use state destination websites compared to local residents who use urban-leaning and rural-leaning destination websites. However, rural-leaning website users spend more time on site compared to state and urban-leaning users.

Residents who use DMO websites are most likely to arrive via organic search, which is particularly common for local resident users who visited state and urbanleaning websites. Meanwhile, residents who use ruralleaning websites are more inclined to arrive directly, via paid search, through social media and by email.

Website Analytics (Average by Local Resident Users by Destination Type) Average Number of Sessions **Average Session Duration** 1,645 5:58 18,326 656 6:24 7:28 State Urban-leaning Urban-leaning Rural-leaning Rural-leanina State **Channels Driving Traffic** (% of Local Resident Users by Destination Type) State Urban-leaning Rural-leaning 71.1% **Organic Search** 53.3% 11.3% 12.9% Direct i7.8% 6.3% Paid Search 1.8% 8.2% 5.6% 4.2% 7.1% Referral ∠% 4.9% 9.0% Socia 2.9% 2.5% 4.1% Email 0.6% 0.8% 0.4% Display 0% 20% 40% 60% 80%

Destination

Website Analytics: Site Behavior of Potential Visitors by Destination Type

While the average number of sessions is highest for potential visitors who use state destination websites, potential visitors who use urban-leaning websites access more pages on average compared to those who use a state or urban-leaning DMO website.

Similar to local residents, potential visitors commonly arrive at these destination websites through organic search, with users of urban-leaning sites being most apt to come through organic search. Potential visitors who use state websites are likelier to arrive via paid search, while those who turn to rural-leaning websites are the likeliest to arrive directly or by referral. Website Analytics (Average by Potential Visitor Users by Destination Type)

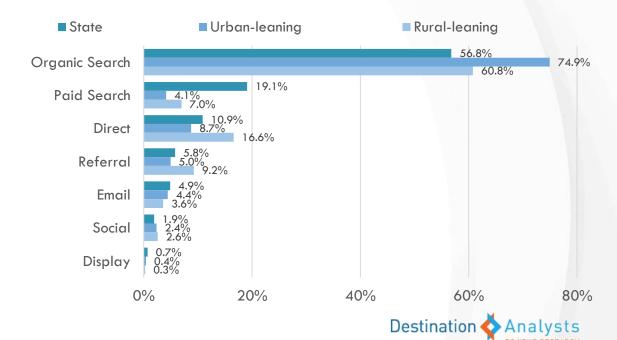
Average Number of Pages

21,9492,8891,1673.584.604.03StateUrban-leaningRural-leaningStateUrban-leaningRural-leaning

Average Number of Sessions

Channels Driving Traffic

(% of Potential Visitor Users by Destination Type)

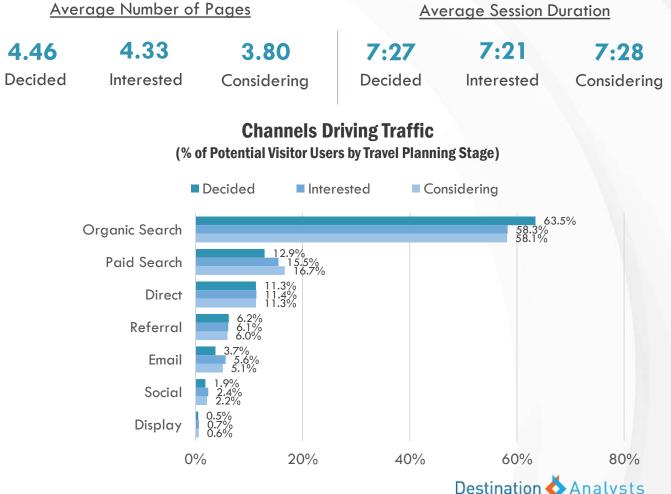


Website Analytics: Site Behavior of Potential Visitors by Travel Planning Stage

Amongst potential visitors in different travel planning stages, those who have already decided to visit the destination view the most content and spend the most time on DMO websites compared to those who can be influenced by the website to visit the destination.

This undecided audience—comprised of those interested in visiting but have yet to make travel plans or who are simply considering destinations is likelier to arrive at DMO websites via paid search and email. Meanwhile, organic search more commonly drives traffic for those who have decided on the destination.

Website Analytics (Average by Potential Visitor Users by Travel Planning Stage)



Website Analytics: Site Behavior of Website Users by Generation

Amongst the generations, Baby Boomers demonstrate the highest number of DMO website sessions, however, Millennials and Gen Xers view more pages during their website session.

Millennials are the likeliest generation to arrive at DMO websites through organic search, while Baby Boomers are the most apt to arrive to DMO websites directly, through a referral or via email. For all three generations, paid search drives traffic for approximately 10 percent.

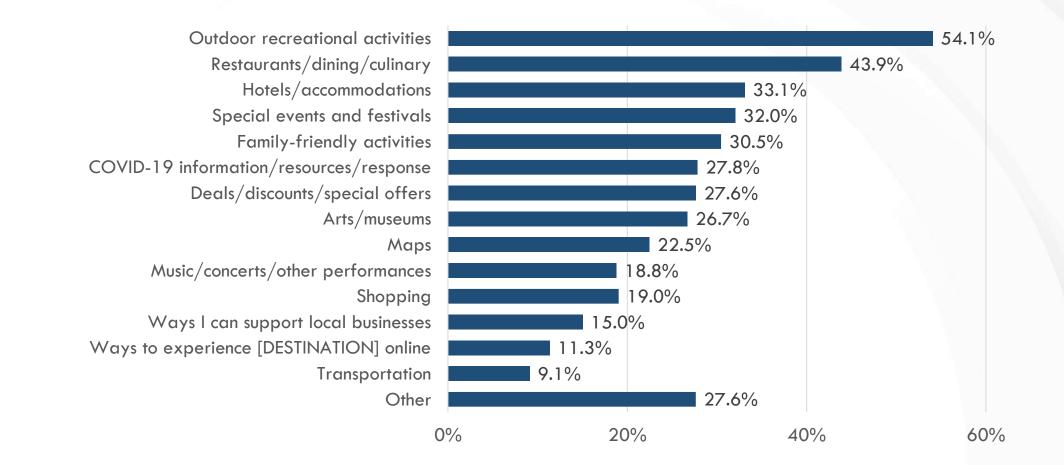
Average Number of Sessions Average Number of Pages 1,104 2,049 4.49 505 4.48 3.71 Millennials Gen Xers **Baby Boomers** Millennials Gen Xers **Baby Boomers Channels Driving Traffic** (% of Website Users by Generation) Millennials Gen Xers Baby Boomers 73.3% **Organic Search** 65.3% 53.7% 9.7% 11.7% 15.0% Direct Paid Search 10.7% 10.5% 4.7% 5.8% 7.4% Referral Social 0.9% Email 8.6% 0.3% 0.7% 0.8% Display 0% 20% 40% 60% 80% Destination

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Website Analytics (Average by Website Users by Generation)

DMO WEBSITE INFORMATION & IMPORTANCE

DESTINATION CONTENT OF INTEREST



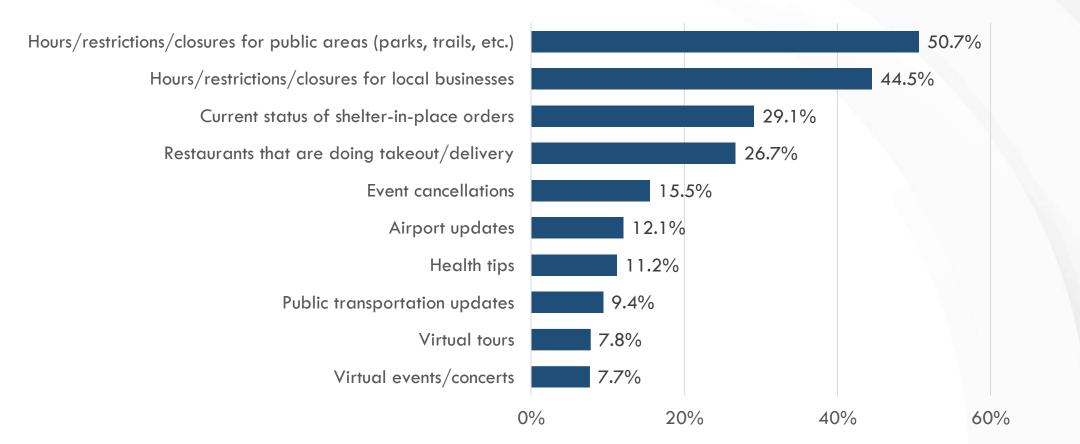
Which of the following types of [DESTINATION] information are you most interested in? (Select all that apply) Base: All Respondents, 256,346 completed surveys.

DESTINATION CONTENT OF INTEREST—FULL DATA BY AUDIENCE SEGMENT

	Total	Local Residents	Local Businesses	Potential Visitors	Meeting Planners	Travel Trade	Media/ Journalists
Outdoor recreational activities	54.1%	62.3 %	40.9%	53.6%	29.9%	49.5%	44.4%
Restaurants/dining/culinary	43.9%	40.8%	33.1%	48.6%	37.8%	54.3%	40.3%
Hotels/accommodations	33.1%	23.8%	24.9%	41.1%	41.0%	62.3%	33.4%
Special events and festivals	32.0%	39.7%	42.3%	28.1%	30.1%	37.6%	34.0%
Family-friendly activities	30.5%	37.5%	35.7%	27.8%	20.1%	41.2%	30.3%
COVID-19 information/resources/response	27.8%	24.3%	26.7%	31.5%	38.6%	43.5%	21.4%
Deals/discounts/special offers	27.6%	30.1%	22.9%	28.5%	20.3%	35.6%	16.5%
Arts/museums	26.7%	28.5%	30.9%	25.8%	25.9%	39.6%	42.8 %
Maps	22.5%	18.4%	19.4%	25.8%	18.0%	35.4%	19.4%
Music/concerts/other performances	18.8%	25.0%	28.5%	14.8%	17.0%	27.0%	26.2%
Shopping	19.0%	16.9%	19.8%	20.6%	16.8%	30.4%	19.3%
Ways I can support local businesses	15.0%	19.5%	26.2%	12.6%	16.6%	19.0%	19.0%
Ways to experience [DESTINATION] online (videos, virtual tours, etc.)	11.3%	11.7%	23.7%	9.8%	20.4%	32.5%	22.5%
Transportation	9.1%	5.0%	14.1%	11.0%	19.0%	33.4%	16.1%
Other	27.6%	31.5%	40.3%	21.6%	32.0%	34.4%	43.7%
Base	256,346	78,466	7,478	147,291	789	1,383	909

Which of the following types of [DESTINATION] information are you most interested in? (Select all that apply) Base: All Respondents, 256,346 completed surveys.

COVID-19 INFORMATION SOUGHT



Thinking about information/resources related to COVID-19, which of the following types of information, if any, are you specifically looking for? (Select all that apply) Base: All Respondents, 256,346 completed surveys.

COVID-19 INFORMATION SOUGHT—FULL DATA BY AUDIENCE SEGMENT

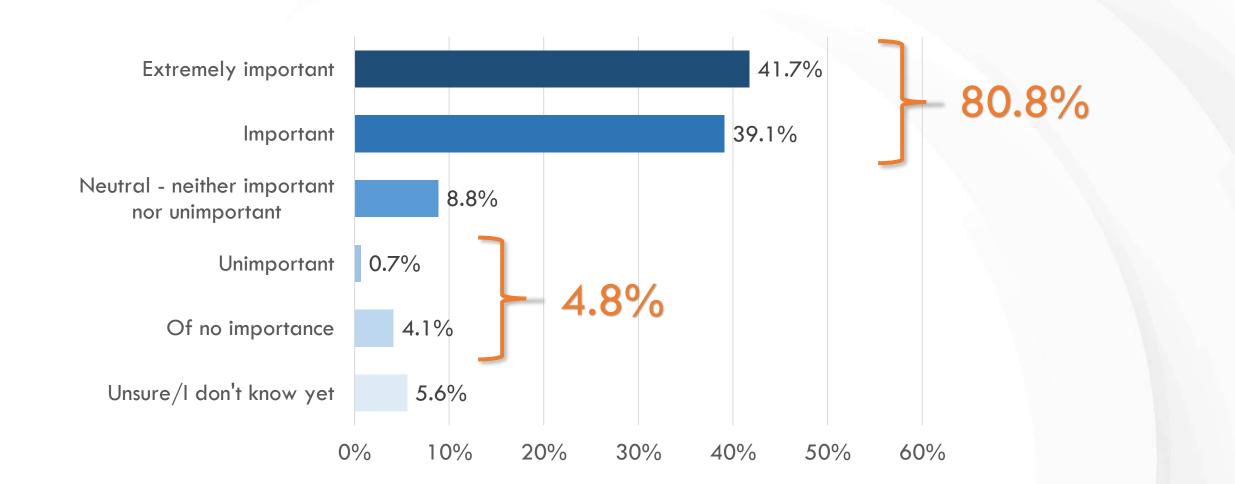
	Total	Local Residents	Local Businesses	Potential Visitors	Meeting Planners	Travel Trade	Media/ Journalists
Hours/restrictions/closures for public areas (parks, trails, etc.)	50.7%	52.6%	33.3%	54.3%	30.8%	49.6 %	29.7 %
Hours/restrictions/closures for local businesses	44.5%	42.5%	32.7%	49.5%	36.3%	48.6%	28.2%
Current status of shelter-in-place orders	29.1%	23.3%	22.1%	34.3%	30.9%	37.2%	21.6%
Restaurants that are doing takeout/delivery	26.7%	25.7%	23.9%	28.9%	18.3%	29.8%	19.9%
Event cancellations	15.5%	17.3%	24.2%	14.5%	23.5%	20.3%	17.8%
Airport updates	12.1%	6.5%	15.4%	15.0%	25.4%	38.5%	17.3%
Health tips	11.2%	12.7%	16.2%	10.5%	16.0%	20.8%	11.2%
Public transportation updates	9.4%	5.4%	13.7%	11.3%	19.2%	31.5%	18.0%
Virtual tours	7.8%	9.8%	19.4%	5.1%	17.7%	20.9%	20.0%
Virtual events/concerts	7.7%	11.8%	22.3%	4.1%	17.0%	15.7%	15.9%
Base	256,346	78,466	7,478	14,7291	789	1,383	909

Thinking about information/resources related to COVID-19, which of the following types of information,

if any, are you specifically looking for? (Select all that apply) Base: All Respondents, 256,346 completed surveys.



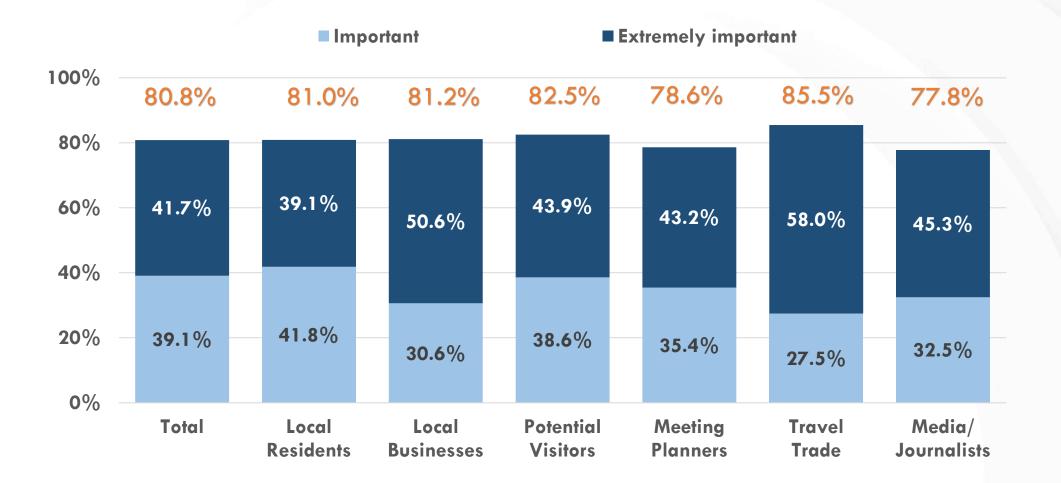
IMPORTANCE OF INFORMATION ON DMO WEBSITE



How important is it that our organization offer the information available on this website? Base: All Respondents, 256,181 completed surveys.

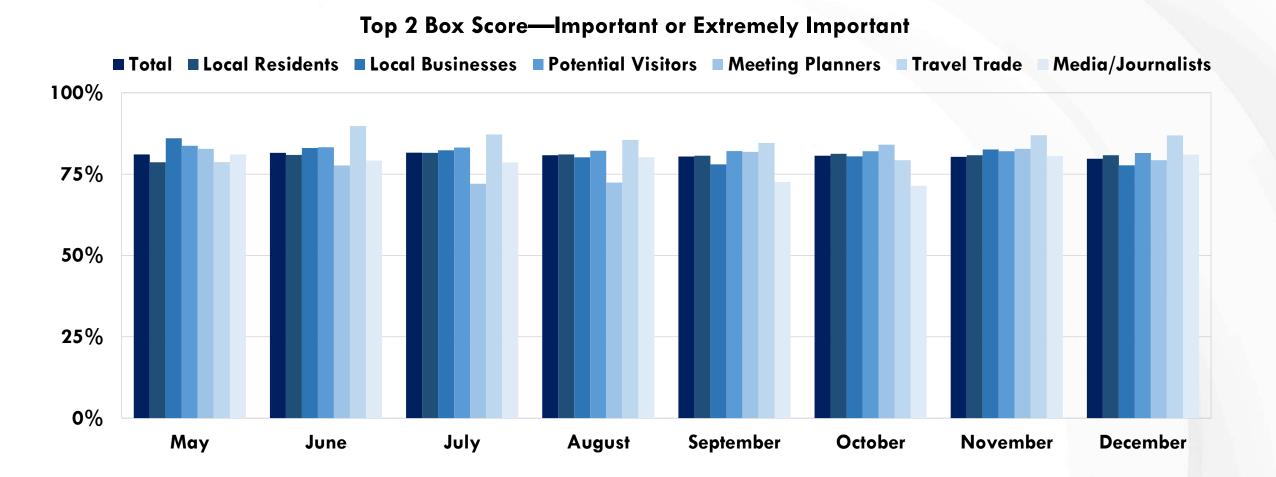


IMPORTANCE OF INFORMATION ON DMO WEBSITE—BY AUDIENCE SEGMENT



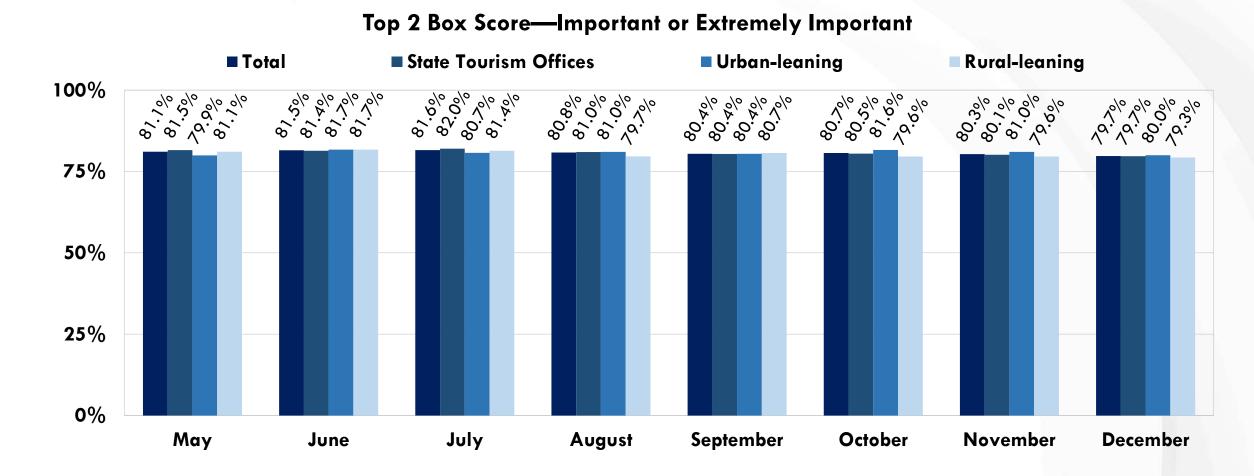
How important is it that our organization offer the information available on this website? Base: All Respondents, 256,181 completed surveys.

TREND: IMPORTANCE OF INFORMATION ON DMO WEBSITE—BY AUDIENCE SEGMENT



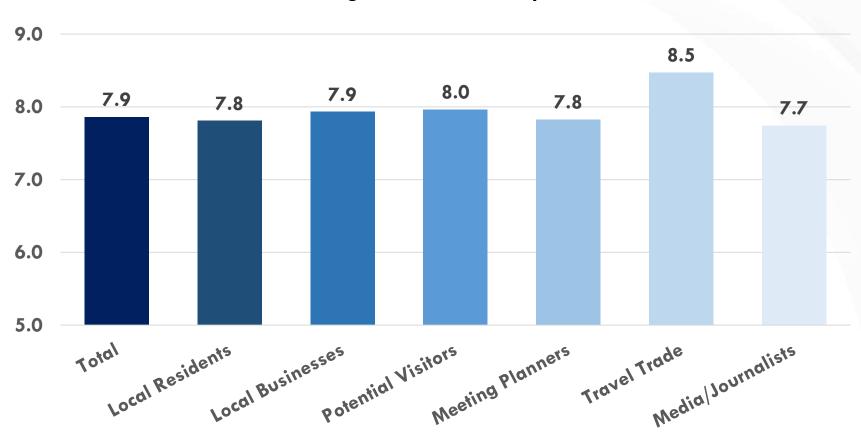
How important is it that our organization offer the information available on this website? Base: All Respondents, 256,181 completed surveys.

TREND: IMPORTANCE OF INFORMATION ON DMO WEBSITE—BY DESTINATION TYPE



How important is it that our organization offer the information available on this website? Base: All Respondents, 256,181 completed surveys.

DMO WEBSITE AS A VALUABLE RESOURCE—BY AUDIENCE SEGMENT

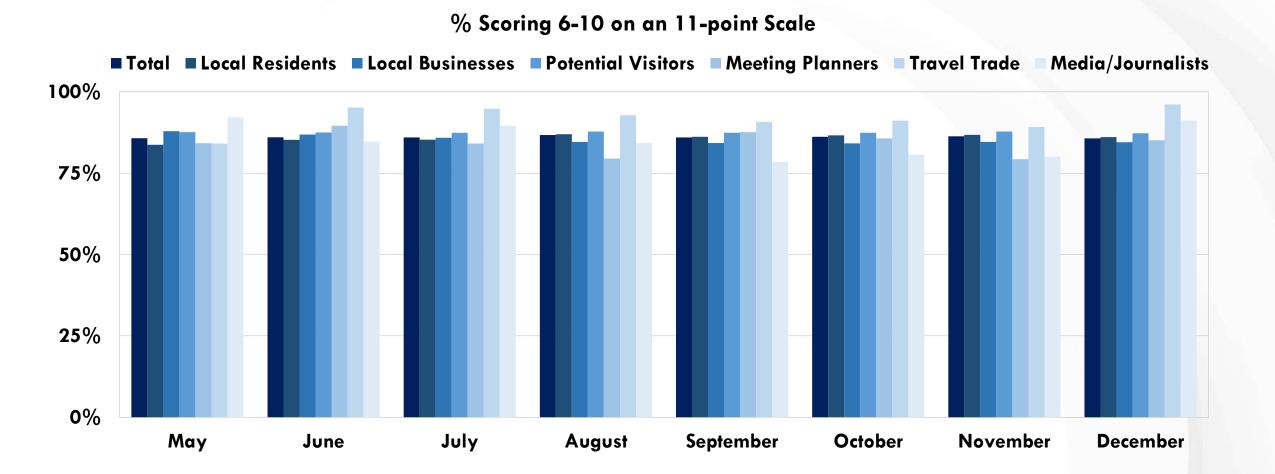


Average score on an 11-point scale

How valuable of a resource do you consider this website? Base: All Respondents, 256,165 completed surveys.

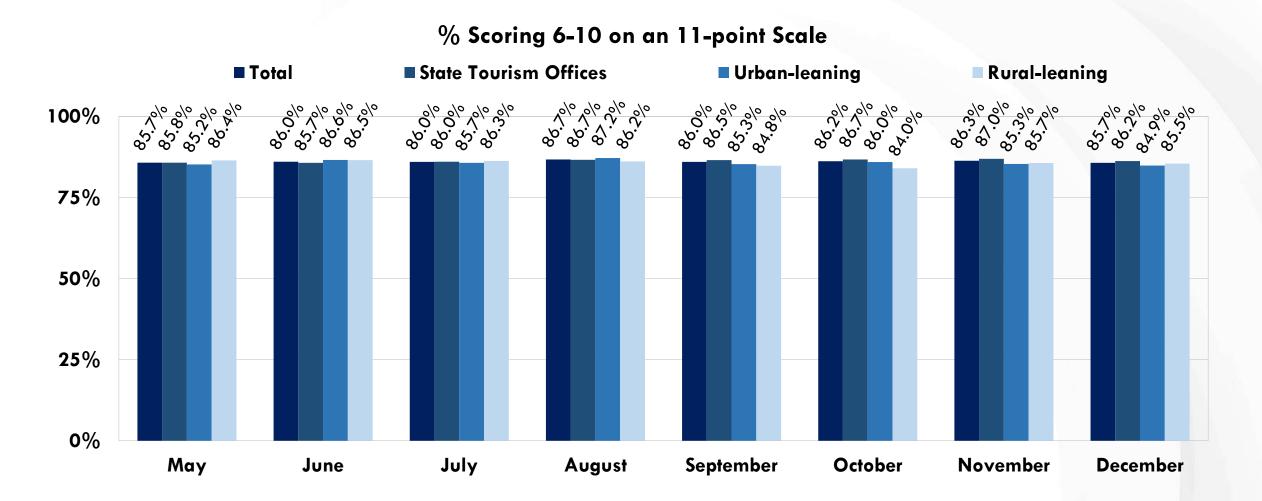


TREND: DMO WEBSITE AS A VALUABLE RESOURCE—BY AUDIENCE SEGMENT



How valuable of a resource do you consider this website? Base: All Respondents, 256,165 completed surveys.

TREND: DMO WEBSITE AS A VALUABLE RESOURCE—BY DESTINATION TYPE



How valuable of a resource do you consider this website? Base: All Respondents, 256,165 completed surveys.

HOW LOCAL RESIDENTS VIEW DMO WEBSITES

Analysis based on respondents who currently live in the destination

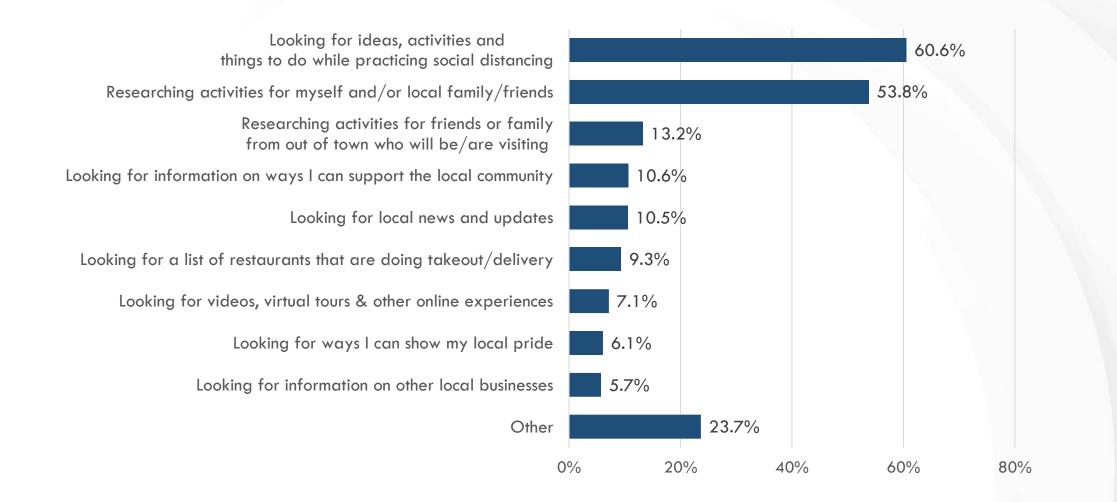
LOCAL RESIDENCE



Do you currently live in [DESTINATION]? Base: All Respondents, 255,884 completed surveys.



REASON FOR WEBSITE VISIT

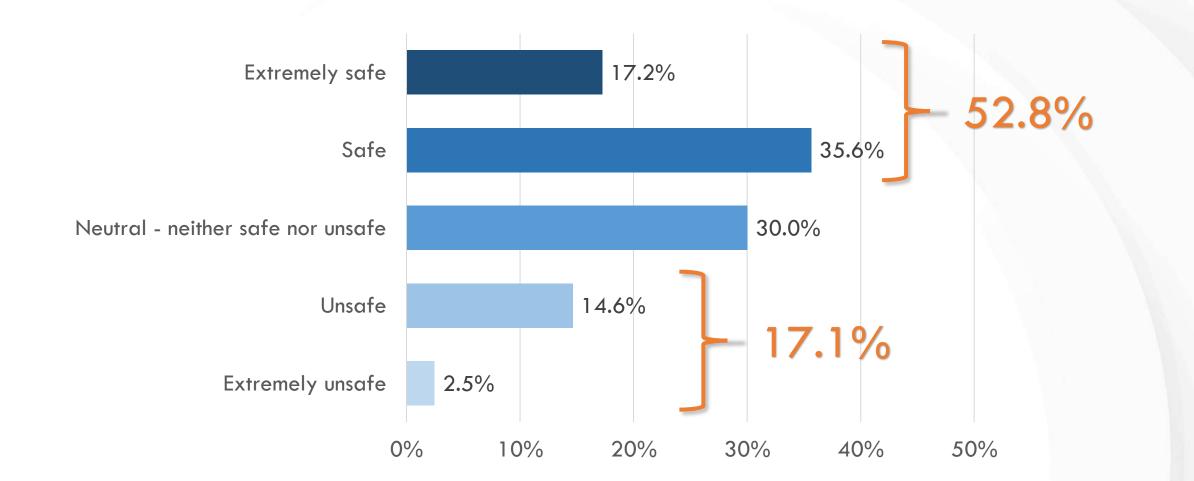


Which of the following describes your reason for visiting our website? (Select all that apply) Base: Local Residents, 78,466 completed responses.



DMO WEBSITE IMPORTANCE STUDY 2020

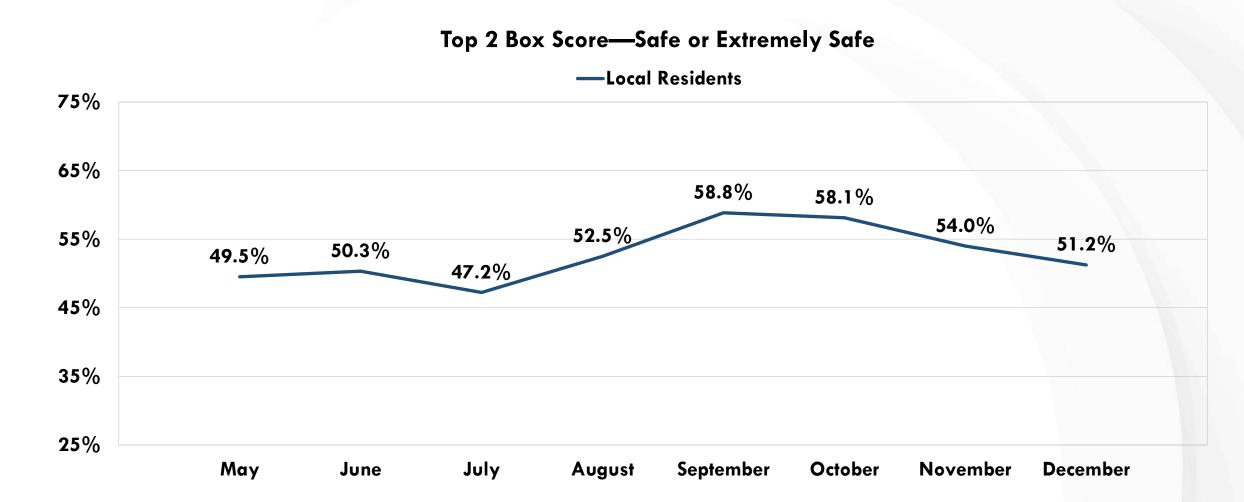
SAFETY IN OWN COMMUNITY



At this moment, how safe do you feel about going out into the community (i.e., walking around, shopping, etc.)? Base: Local Residents, 78,444 completed responses.

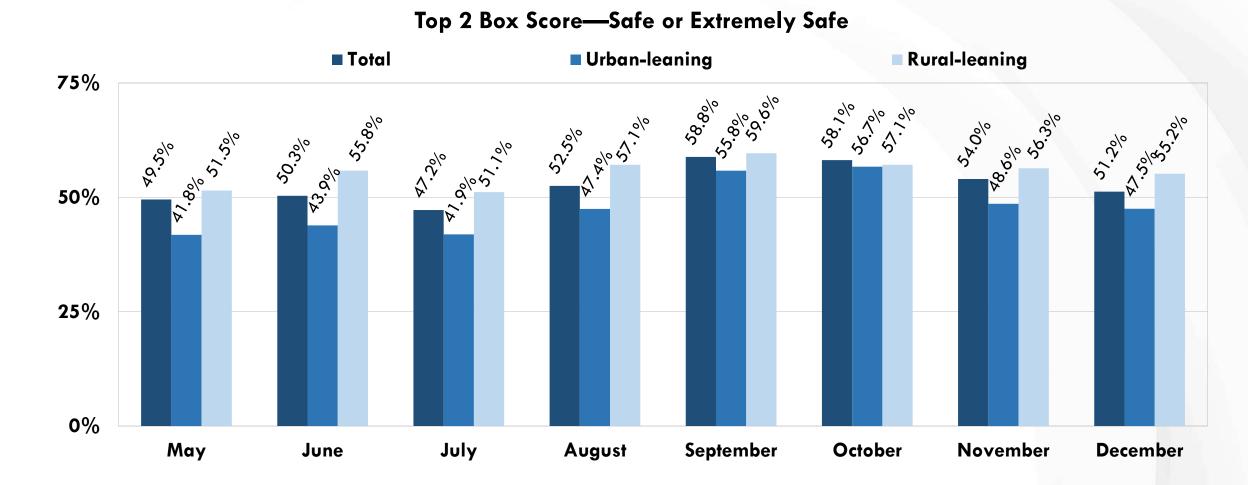


TREND: SAFETY IN OWN COMMUNITY



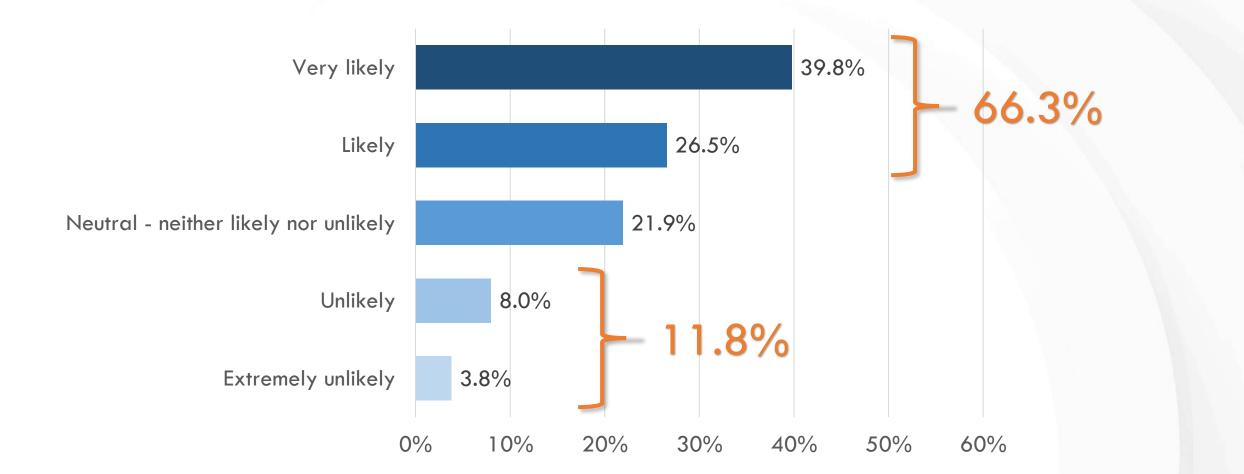
At this moment, how safe do you feel about going out into the community (i.e., walking around, shopping, etc.)? Base: Local Residents, 78,444 completed responses.

TREND: SAFETY IN OWN COMMUNITY—BY DESTINATION TYPE



At this moment, how safe do you feel about going out into the community (i.e., walking around, shopping, etc.)? Base: Local Residents, 78,444 completed responses.

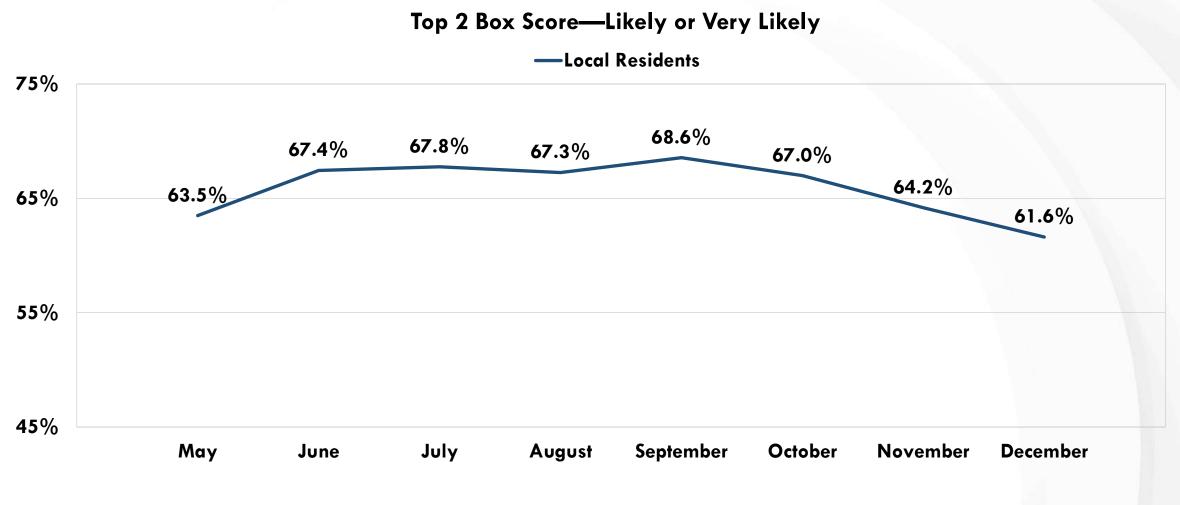
LIKELIHOOD TO PLAN A "STAYCATION"



How likely are you to plan a "Staycation" in [DESTINATION] in the next six months? Base: Local Residents, 78,441 completed responses.

DMO WEBSITE IMPORTANCE STUDY 2020

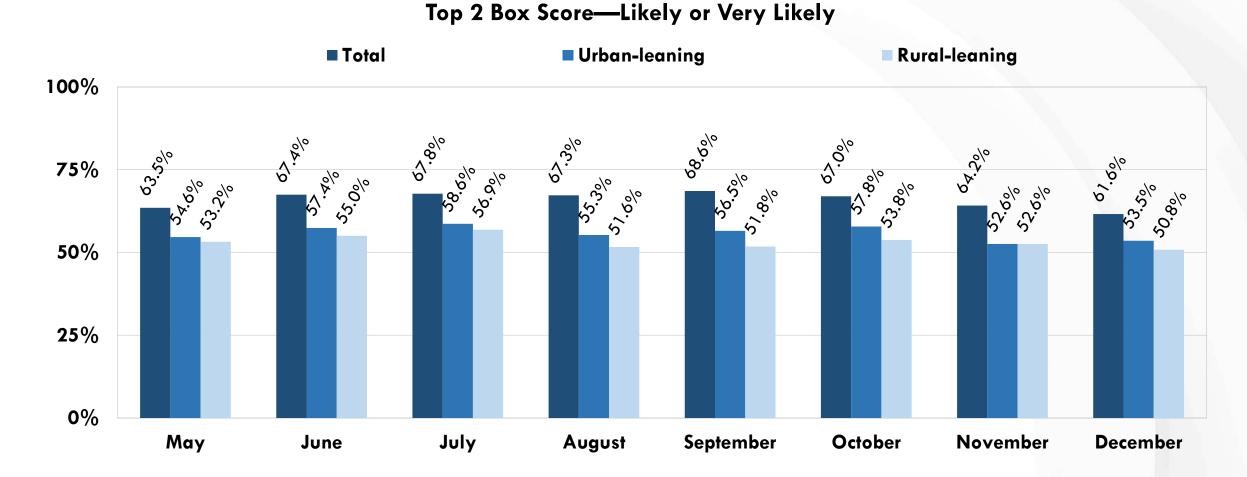
TREND: LIKELIHOOD TO PLAN A "STAYCATION"



How likely are you to plan a "Staycation" in [DESTINATION] in the next six months? Base: Local Residents, 78,441 completed responses.



TREND: LIKELIHOOD TO PLAN A "STAYCATION"—BY DESTINATION TYPE

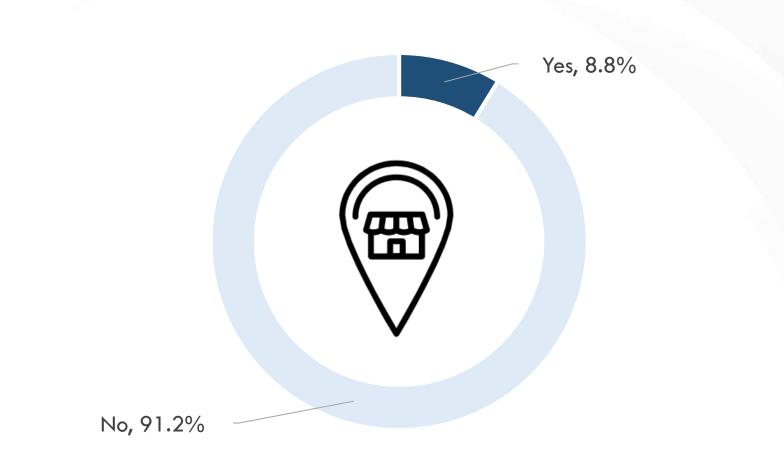


How likely are you to plan a "Staycation" in [DESTINATION] in the next six months? Base: Local Residents, 78,441 completed responses.

HOW LOCAL BUSINESSES VIEW DMO WEBSITES

Analysis based on survey respondents who represent a local business

LOCAL BUSINESS

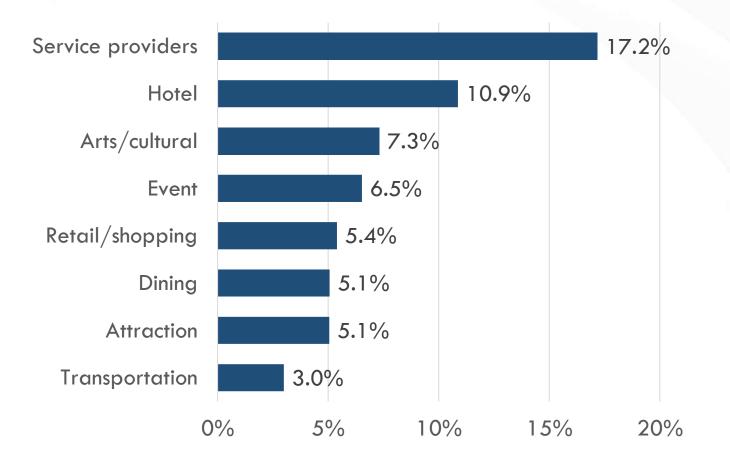


Do you represent a local [DESTINATION] business, and are using this site for professional reasons? Base: Local Respondents, 78,466 completed surveys.

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DMO WEBSITE IMPORTANCE STUDY 2020

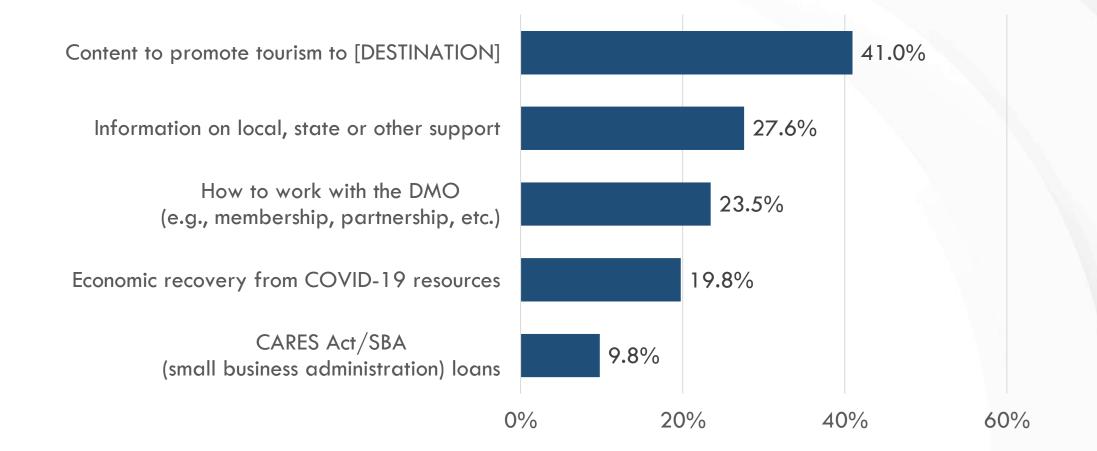
TYPE OF LOCAL BUSINESS



Which of the following best describes your business? Base: Local Businesses, 7,482 completed responses.



LOCAL BUSINESS INFORMATION SOUGHT



Are you looking for any of the following information on our website? (Select all that apply) Base: Local Businesses, 7,478 completed responses.

HOW POTENTIAL VISITORS VIEW DMO WEBSITES

Analysis based on non-local website users who reported they are gathering information for a planned or potential trip

DEMOGRAPHIC PROFILE – POTENTIAL VISITORS



Gender

Female: 59.2% Male: 34.2% Non-binary: 0.4%



Average Age: 54.8

Millennial or younger: 13.1% Gen X: 30.4% Boomer or older: 50.4%



Marital Status

Married/partnered: 69.2% Single: 20.4% Children under 18: 16.1%

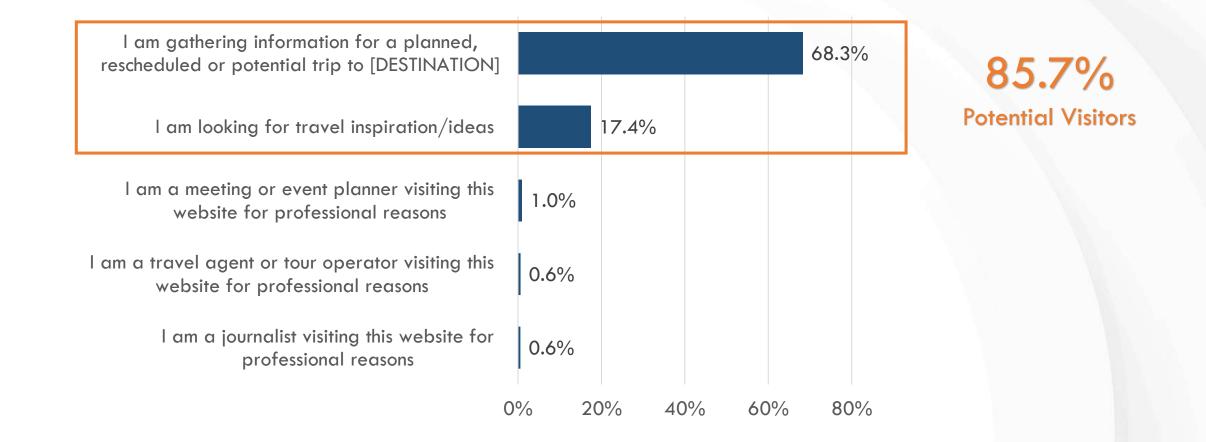
Base: Potential Visitors, 146,110 completed responses.





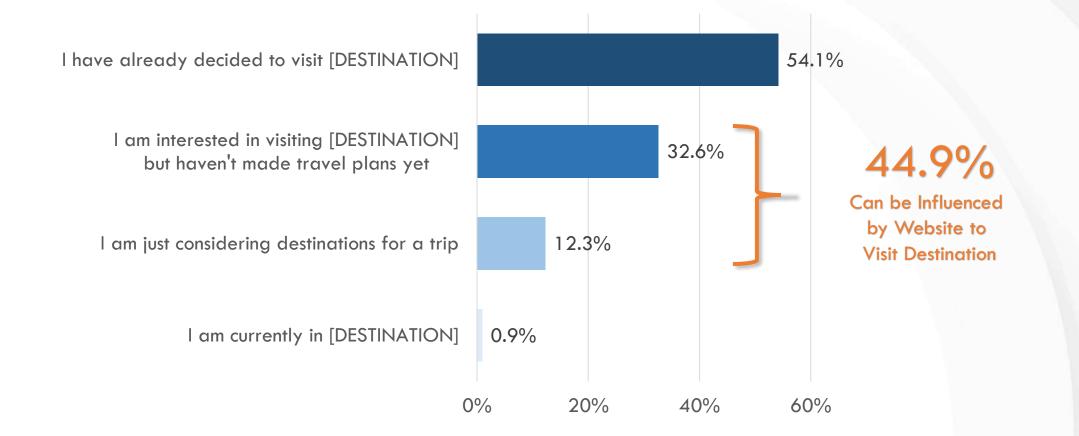
48

REASON FOR WEBSITE VISIT – NON-LOCAL RESIDENTS



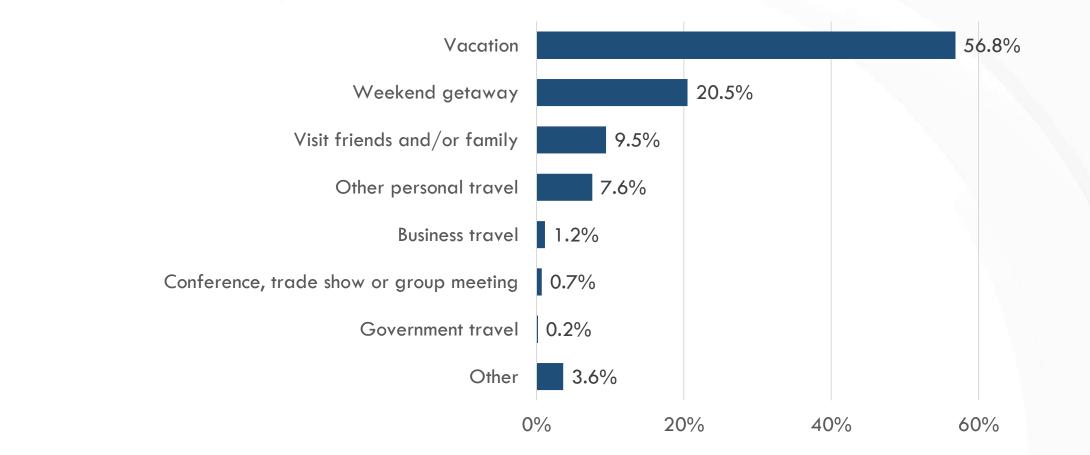
Which of the following best describes you? (Select one) Base: Non-Local Residents, 170,032 completed surveys.

POINT IN TRAVEL PLANNING PROCESS



Which best describes where you are in the trip planning process? (Select one) Base: Website users gathering information for a trip, 116,569 completed responses.

TYPE OF TRIP



Which best describes the type of trip you are planning or considering? (Select one) Base: Potential Visitors, 147,253 completed responses.



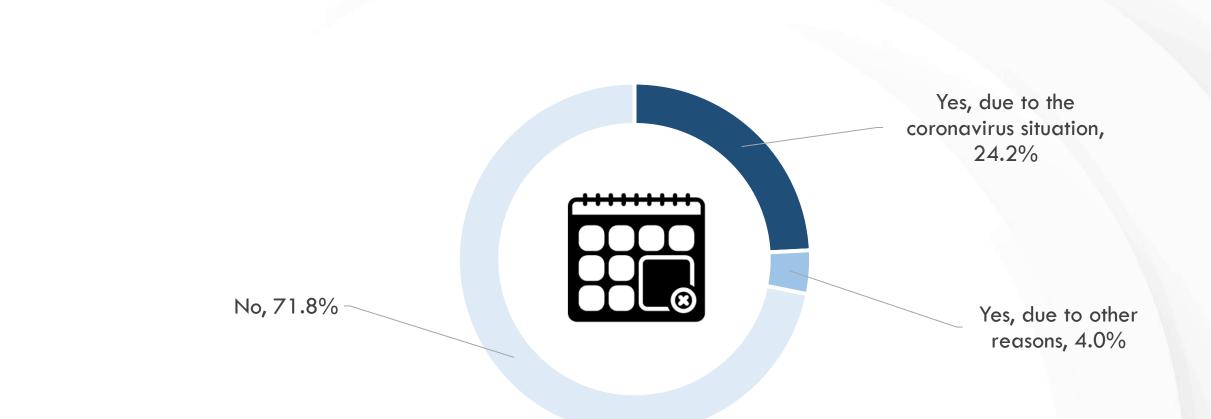
LIKELY MONTH OF TRIP

	Month of Survey							
Likely Month of Trip	May 2020	June 2020	July 2020	August 2020	September 2020	October 2020	November 2020	December 2020
May 2020	13.0%							
June 2020	36.5%	22.5%						
July 2020	26.7%	41.9%	29.8%					
August 2020	15.7%	20.8%	33.7%	24.1%				
September 2020	11.5%	13.5%	18.9%	33.8%	25.1%			
October 2020	8.9%	9.0%	12.3%	20.5%	36.4%	29.1%		
November 2020	4.4%	4.1%	5.2%	8.3%	14.2%	27.5%	23.9%	0.0%
December 2020	3.3%	3.0%	3.5%	5.2%	8.9%	13.7%	25.9 %	23.9%
January 2021	2.2%	2.1%	2.8%	3.8%	5.5%	7.8%	14.0%	20.9%
February 2021	2.8%	2.3%	2.7%	3.9%	4.9%	7.2%	9.0%	13.1%
March 2021	2.6%	2.5%	2.9%	4.3%	5.4%	7.2%	9.3%	11.8%
April 2021	2.8%	2.4%	3.0%	4.4%	5.1%	6.6%	7.8%	9.6%
May 2021 or later	6.0%	5.9%	8.6%	10.8%	11.5%	14.4%	17.9%	24.7 %
Uncertain - I have not decided	8.9%	8.9%	11.3%	12.8%	12.1%	14.0%	17.1%	17.0%
Average # of Months Trip Was Planned in Advance	3.1	2.5	2.4	2.5	2.3	2.2	2.1	2.0
Base	9,548	25,257	23,089	20,812	17,664	15,529	12,477	12,290

When are you most likely to take a trip to [DESTINATION]? (Select all that apply) Base: Potential Visitors, 147,253 completed responses.



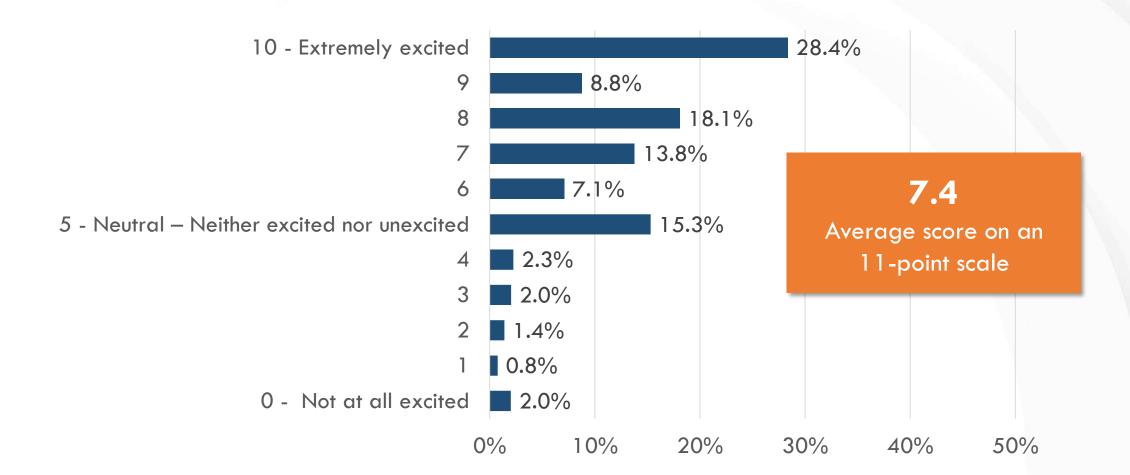
PREVIOUSLY POSTPONED/RESCHEDULED TRIP



Was <u>this trip</u> you are planning or considering taking to [DESTINATION] previously postponed/rescheduled? Base: Potential Visitors, 147,257 completed responses.

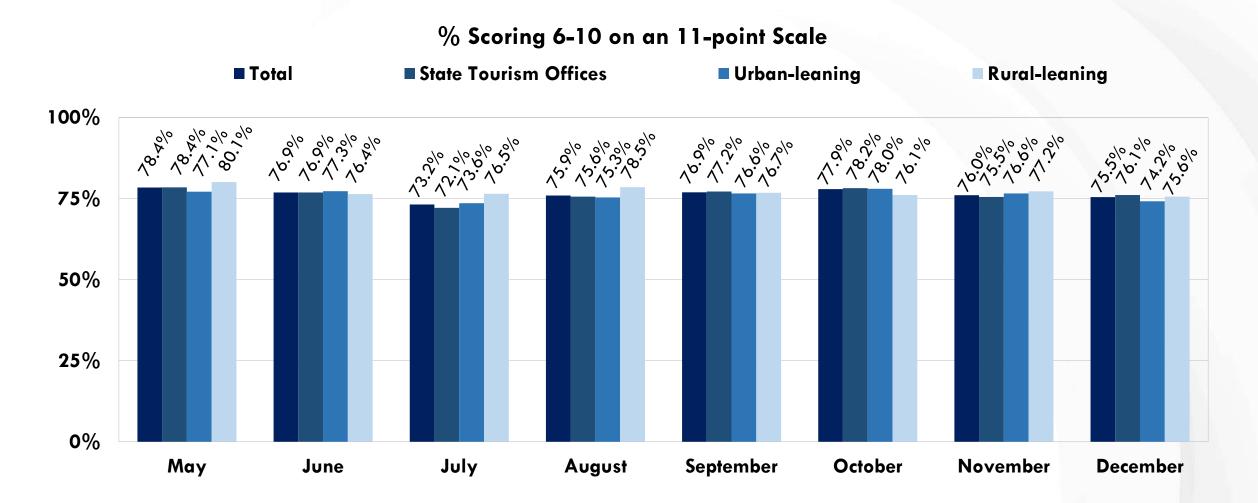


EXCITEMENT TO TAKE A TRIP RIGHT NOW



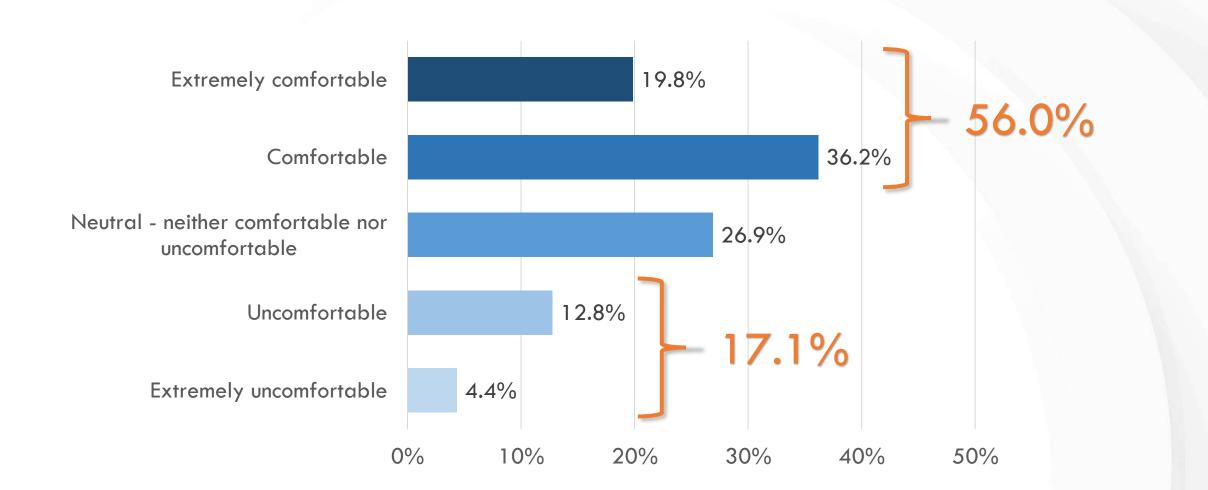
How excited do you feel about taking a trip to [DESTINATION] right now? Please use the scale below. Base: Potential Visitors, 147,246 completed responses.

TREND: EXCITEMENT TO TAKE A TRIP RIGHT NOW—BY DESTINATION TYPE



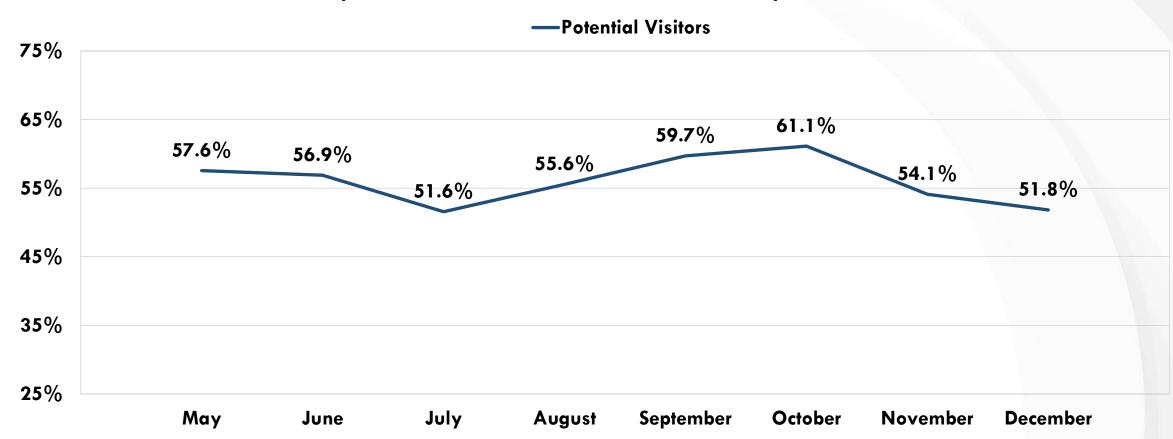
How excited do you feel about taking a trip to [DESTINATION] right now? Please use the scale below. Base: Potential Visitors, 147,246 completed responses.

COMFORT TRAVELING RIGHT NOW



How comfortable do you feel about traveling to [DESTINATION] right now? Base: Potential Visitors, 147,244 completed responses.

TREND: COMFORT TRAVELING RIGHT NOW



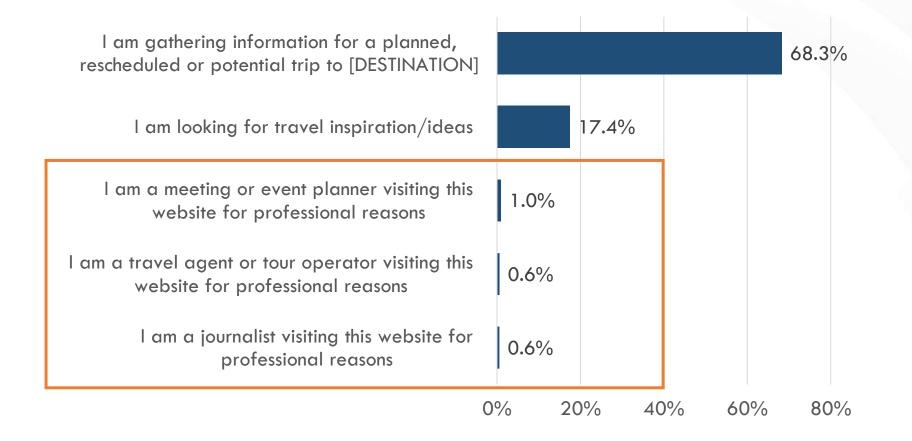
Top 2 Box Score—Comfortable or Extremely Comfortable

How comfortable do you feel about traveling to [DESTINATION] right now? Base: Potential Visitors, 147,244 completed responses.

MEETING PLANNERS, TRAVEL TRADE & JOURNALISTS

Analysis based on non-local website users who reported they are gathering information for professional reasons

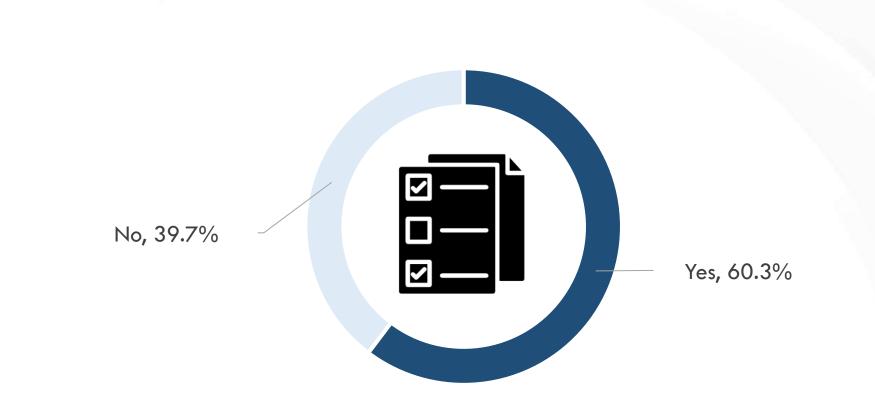
REASON FOR WEBSITE VISIT – NON-LOCAL RESIDENTS



Which of the following best describes you? (Select one) Base: Non-Local Professionals, 3,081 completed surveys.



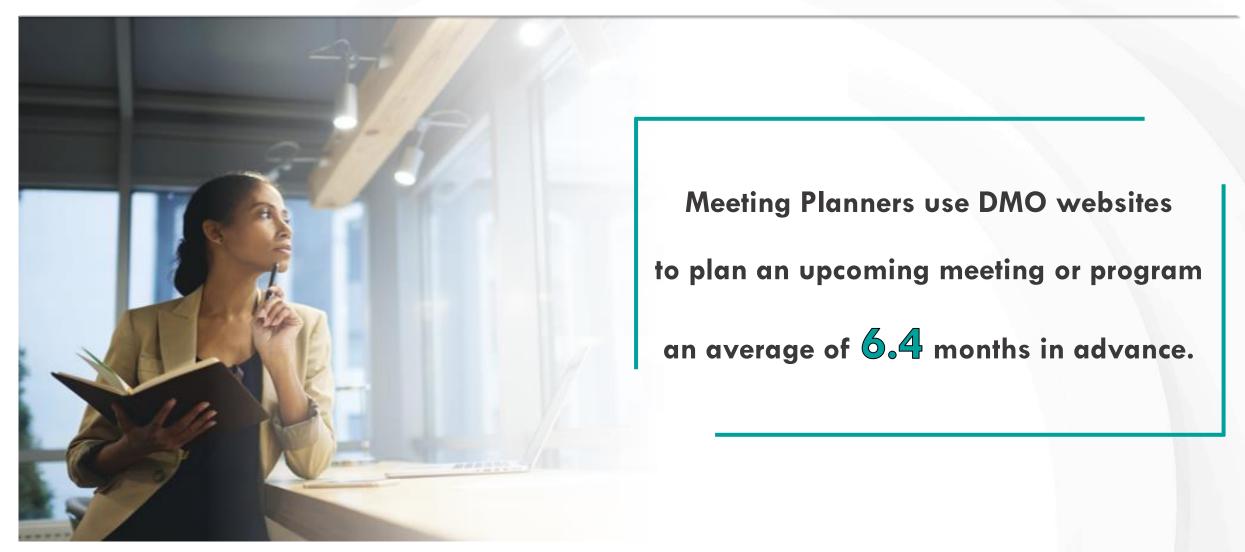
MEETING PLANNERS: CONSIDERING DESTINATION FOR A MEETING



Are you considering [DESTINATION] for an upcoming meeting or program? Base: Meeting Planners, 789 completed responses.



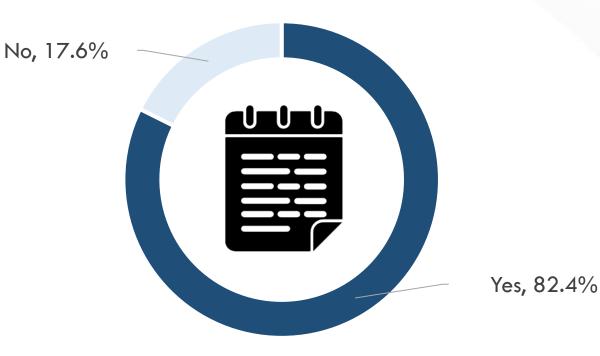
MEETING PLANNERS: MONTH OF UPCOMING MEETING



Even if only tentatively scheduled, when will this meeting/program take place? Base: Meeting Planners who are considering [DESTINATION] for an upcoming meeting or program, 472 completed responses.



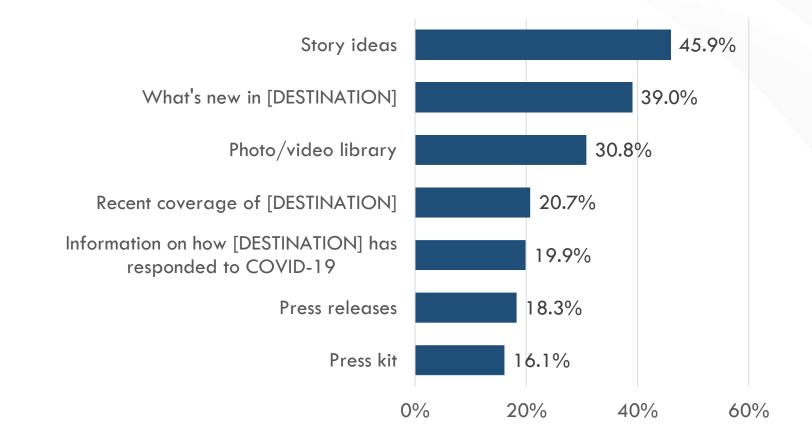
TRAVEL TRADE: CONSIDERING DESTINATION FOR A TOUR PACKAGE



Are you considering [DESTINATION] for a tour package or itinerary? Base: Travel Trade, 1,383 completed responses.



MEDIA/JOURNALISTS: MEDIA-RELATED INFORMATION SOUGHT



Which of the following types of media-related information are you looking for on our website? (Select all that apply) Base: Media/Journalists, 909 completed responses.

SUMMARY OF WEBSITE ANALYTICS

Analysis based on website analytics evaluating site behaviors and key site performance metrics by user groups identified in the Website User Intercept Survey

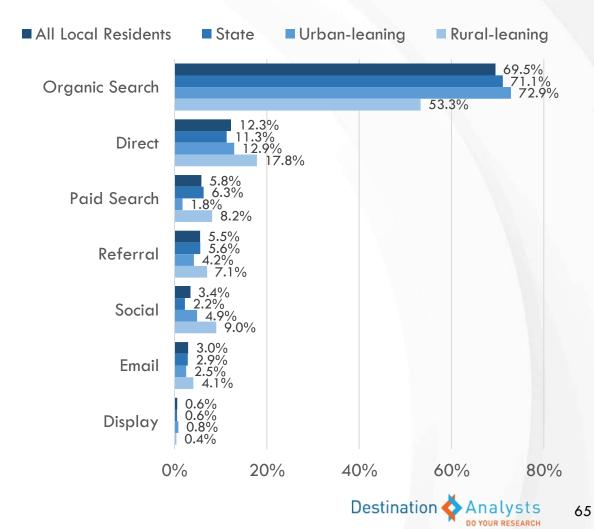
LOCAL RESIDENTS

Website Analytics Summary

Average by Destination Type

Channels Driving Traffic

Users by Destination Type



	All Local Residents	State	Urban- leaning	Rural- leaning		
Session Details:						
Sessions	3,750	18,326	1,645	656		
Average Session Duration	6:52	6:24	5:58	7:28		
New Users	3,480	19,505	1,835	734		
Page Details:						
Pageviews	12,325	66,055	5,639	2,126		
Average Number of Pages	3.26	3.02	3.48	3.19		
Average Time on Page	2:18	2:11	1:55	2:32		

Source: Participating Destination Websites' Google Analytics Base: Website users who reside in [DESTINATION]

DMO WEBSITE IMPORTANCE STUDY 2020

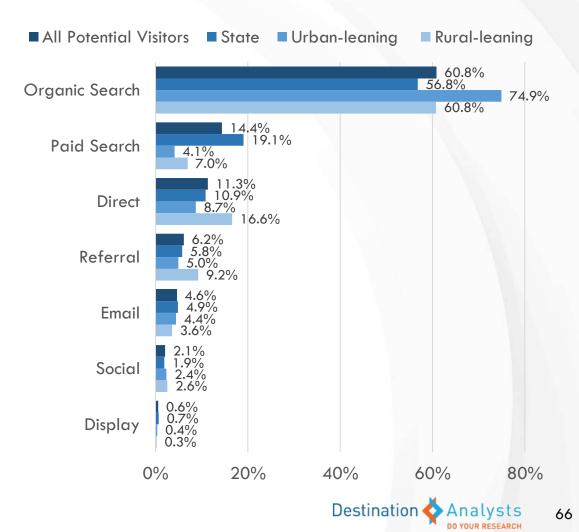
POTENTIAL VISITORS

Website Analytics Summary

Average by Destination Type

Channels Driving Traffic

Users by Destination Type



	All Potential Visitors	State	Urban- leaning	Rural- leaning			
Session Details:							
Sessions	4,658	21,949	2,889	1,167			
Average Session Duration	7:27	7:40	7:52	7:09			
New Users	4,404	20,915	2,660	1,100			
Page Details:							
Pageviews	18,661	85,824	12,135	4,907			
Average Number of Pages	4.14	3.58	4.60	4.03			
Average Time on Page	1:56	2:14	1:55	1:52			

Source: Participating Destination Websites' Google Analytics Base: Website users who live outside [DESTINATION] who were gathering trip information or are looking for travel inspiration

POTENTIAL VISITORS BY TRAVEL PLANNING STAGE

Website Analytics Summary

Average by Travel Planning Stage

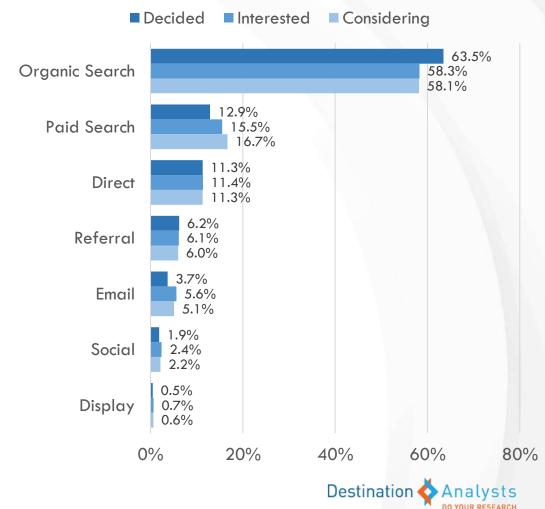
	Decided	Interested	Considering			
Session Details:						
Sessions	1,665	1,184	542			
Average Session Duration	7:27	7:21	6:26			
New Users	1,554	1,119	519			
Page Details:						
Pageviews	6,934	4,766	2,063			
Average Number of Pages	4.46	4.33	3.80			
Average Time on Page	1:48	1:49	1:49			

Source: Participating Destination Websites' Google Analytics

Base: Website users who were live outside [DESTINATION] who were gathering trip information or are looking for travel inspiration who stated they had either already decided to visit [DESTINATION], were interested in [DESTINATION] but haven't made firm travel plans or were considering destinations for a leisure trip

Channels Driving Traffic

Users by Travel Planning Stage



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WEBSITE USERS BY GENERATION

Website Analytics Summary

Average by Generation

	Millennials	Gen Xers	Baby Boomers			
Session Details:						
Sessions	505	1,104	2,049			
Average Session Duration	8:06	8:23	7:49			
New Users	468	1,036	1,939			
Page Details:						
Pageviews	2,163	4,853	7,791			
Average Number of Pages	4.48	4.49	3.71			
Average Time on Page	1:55	2:03	2:18			

Source: Participating Destination Websites' Google Analytics Base: Website users who were either Millennials, Generation Xers or Baby Boomers

Channels Driving Traffic Users by Generation Millennials Gen Xers Baby Boomers 73.3% Organic Search 65.3% 53.7% 9.7% Direct 11.7% 15.0% 9.0% Paid Search 10.7% 10.5% 4.7% Referral 5.8% 7.4% 2.1% Social 2.7% 4.0% 0.9% Email 3.1% 8.6% 0.3% Display 0.7% 0.8% 0% 20% 40% 60% 80%

Destination

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UR RESEARCH

DMO WEBSITE IMPORTANCE STUDY 2020

MESSAGES TO THE LOCAL TOURISM & HOSPITALITY INDUSTRY

"A wonderful web presence where tourists and locals alike can find relevant information to enjoy our wonderful place. Stay vigilant we will get through this."

IIII

-Local Resident

"This is my go-to for updated information about what's happening in the area. We're all doing our part to help everyone the best we can." -Local Business "Being able to still experience the sites and sounds of the area is great. Your adaptability to the current health crisis and willingness to find a way to keep operations going is a credit to you and your community."

-Potential Visitor

"Thank you for doing a great job of being active, transparent, and communicative. It helps make my job selecting meeting locations and venues so much easier."

-Meeting Planner

CALIFORNIA

"I can't wait to bring my cruise groups back. I have been a travel advisor for over 40 years and miss the 'old normal.' You have always supported the industry and I know we will all survive."

-Travel Trade

"My dream is to help show people that states have so much to offer. And what I've seen on your site so far is impressive. America is waiting, it's not just a dream, it's a destination." - Media/Journalist