

2012 DMO Marketing Activities Study



A Benchmark Study on Destination Marketing Practices

Confidential



DMO Marketing Activities Study

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INTRODUCTION

The DMO Marketing Activities Study is the most comprehensive study on DMO marketing practices to date. This inaugural research program focuses on marketing budgets, strategies and initiatives. The goal of this study is to provide DMOs with a unique and invaluable informational resource to guide their marketing, budgeting and planning.

The report covers the following key areas and themes:

- Budgets
- How budgets are deployed
- Traditional and digital marketing mediums and initiatives
- International marketing efforts
- Current and future website applications and integration
- Mobile websites and destination apps

In April 2012, an online survey was sent to 517 US DMO marketing executives. A total of 240 DMOs responded (representing \$1,270,859,000 in total budgets combined) for a 46% response rate. The data is broken out in six budget range categories:

Budget Range	Number of DMO Respondents
Less than \$500,000	29
\$500,000 - \$999,999	53
\$1,000,000 - \$1,999,999	44
\$2,000,000 - \$3,999,999	40
\$4,000,000 - \$9,999,999	41
\$10,000,000 or more	33

The DMO Marketing Activities Study is published by the Destination Marketing Association International (DMAI), which protects and advances the success of official destination marketing organizations worldwide. This study was funded by a grant from the Destination & Travel Foundation and is provided as an in-kind contribution to Brand USA.

DMAI and the Destination & Travel Foundation thank all of the respondents for their invaluable contributions to this study. Thanks also to Mandala Research for hosting the online survey and Ruth Trojan, Nadler & Associates, for authoring the report.

RESPONDENTS – ALPHABETICAL

1000 Islands, NY
Aberdeen, SD
Abilene, TX
Akron/Summit, OH
Albuquerque, NM
Alexandria, VA
Alpharetta, GA
Amelia Island, FL
Anaheim/Orange Co., CA
Anchorage, AK
Ann Arbor, MI
Annapolis/Anne Arundel Co., MD
Arlington, VA
Athens, GA
Atlanta, GA
Aurora, CO
Aurora, IL
Austin, TX
Baltimore, MD
Baton Rouge, LA
Bay Area Houston, TX
Bellevue, WA
Bellingham/Whatcom Co., WA
Berkshire, MA
Bismarck-Mandan, ND
Bloomington, IN
Bloomington, MN
Boise, ID
Boston, MA
Boulder, CO
Bowling Green, KY
Broken Arrow, OK
Brookfield, WI

Brown Co., IN
Butler Co., PA
Calhoun Co., MI
Carlsbad, CA
Casper, WY
Central Oklahoma, OK
Champaign Co., IL
Chanute, KS
Charleston, SC
Charleston, WV
Charlottesville Albemarle, VA
Cheyenne, WY
Chicago, IL
Cincinnati, OH
Cleveland, OH
Colorado Springs, CO
Columbia, MO
Columbia, SC
Columbus, GA
Columbus, OH
Crawford Co., KS
Cumberland Valley, PA
Dallas, TX
Dalton, GA
Davis, UT
Dayton/Montgomery Co., OH
Daytona Beach, FL
Denver, CO
Des Moines, IA
Dublin, OH
Duluth, MN
Duncan, OK
Dunwoody, GA

Durham, NC
Eau Claire, WI
Elk Co., KS
Enid, OK
Estes Park, CO
Evansville, IN
Fairfax, VA
Fargo-Moorhead, ND
Flagler Co., FL
Flagstaff, AZ
Fort Collins, CO
Fort Lauderdale, FL
Fort Scott, KS
Fort Worth, TX
Frankenmuth, MI
Fredonia, KS
French Lick West Baden, IN
Fresno/Clovis, CA
Frisco, TX
Gainesville, FL
Galena/Jo Daviess Co., IL
Galveston Island, TX
Garnett, KS (city)
Garnett, KS (chamber)
Gettysburg, PA
Grand Rapids, MI
Grapevine, TX
Greene Co., OH
Greensboro, NC
Greenville, TX
Hagerstown/Washington Co., MD
Hampton, VA
Hawaii, HI

Henderson, NV
Holland, MI
Howard Co., MD
Humboldt, KS
Huntingdon Co., PA
Huntington Beach, CA
Huntsville/Madison Co., AL
Independence, MO
Indianapolis, IN
Iola, KS
Irvine, CA
Irving, TX
Jackson, MI
Jacksonville, FL
Jefferson Co., WV
Joplin, MO
Juneau, AK
Kalamazoo, MI
Kansas City, MO
Kissimmee, FL
Knoxville, TN
Labette Co., KS
Lafayette, LA
Lake Erie Shores & Islands, OH
Lake Havasu City, AZ
Lake Placid, NY
Lansing, MI
LaPorte Co., IN
Las Vegas, NV
Lawrence, KS
Lexington, KY
Little Rock, AR
Los Angeles, CA

RESPONDENTS – ALPHABETICAL (CONT'D.)

Loudoun, VA	Palm Springs, CA	Sacramento, CA	Tupelo, MS
Louisville, KY	Panama City Beach, FL	Saint Paul, MN	Vacaville, CA
Lynchburg, VA	Perry Co., IN	Salt Lake City, UT	Vail Valley, CO
Macon/Bibb Co., GA	Philadelphia, PA (GPTMC)	San Antonio, TX	Ventura, CA
Madison, WI	Philadelphia, PA (PCVB)	San Diego, CA	Virginia Beach, VA
Mammoth Lakes, CA	Phoenix, AZ	San Francisco, CA	Washington Co., OR
Maryland Heights, MO	Pittsburgh, PA	Sandy Springs, GA	Washington Co., PA
McAllen, TX	Placer Valley, CA	Santa Monica, CA	Washington, DC
McHenry Co., IL	Plano, TX	Sarasota Co., FL	Wausau/Central Wisconsin, WI
McKean Co., PA	Pocono Mountains, PA	Saratoga, NY	West Hollywood, CA
Memphis, TN	Porter Co., IN	Savannah, GA	Whitefish, MT
Miami, FL	Portland, OR	Scottsdale, AZ	Winston-Salem, NC
Minneapolis NW, MN	Potter Co., PA	Seattle, WA	Woodson Co., KS
Minneapolis, MN	Prince William & Manassas, VA	Sioux City, IA	Woodward, OK
Missoula, MT	Providence Warwick, RI	Sioux Falls, SD	Yakima Valley, WA
Mobile Bay, AL	Pulaski Co., MO	Somerset Co., NJ	
Monterey Co., CA	Quad Cities, IA	Sonoma Co., CA	
Myrtle Beach, SC	Racine, WI	Southern Shore, NJ	
Naples, Marco Island, Everglades, FL	Raleigh, NC	Spokane, WA	
Nashville, TN	Randolph, NC	Springfield, MO	
Newport, RI	Rapid City, SD	St. Louis, MO	
Newport Beach, CA	Redding, CA	Steuben Co., NY	
Norman, OK	Reno Sparks, NV	Stillwater, OK	
Northern Kentucky, KY	Richmond, VA	Stockton, CA	
Ogden/Weber, UT	River Parishes, LA	Syracuse, NY	
Oklahoma City, OK	Rochester, MN	Tampa Bay, FL	
Orlando, FL	Rochester, NY	Temecula Valley, CA	
Owensboro/Daviess Co., KY	Rockford, IL	Toledo, OH	
Oxnard, CA	Rogers, AR	Topeka, KS	
Paducah, KY	Roseville, MN	Traverse City, MI	
Palm Beach Co., FL	Round Rock, TX	Tucson, AZ	

RESPONDENTS – BUDGET SIZE

Less than \$500,000

Aberdeen, SD
 Bay Area Houston, TX
 Broken Arrow, OK
 Chanute, KS
 Crawford Co., KS
 Duncan, OK
 Elk Co., KS
 Enid, OK
 Fort Scott, KS
 Fredonia, KS
 Garnett, KS (chamber)
 Garnett, KS (city)
 Humboldt, KS
 Huntingdon Co., PA
 Independence, MO
 Iola, KS
 Irvine, CA
 Jefferson Co., WV
 Labette Co., KS
 Maryland Heights, MO
 McHenry Co., IL
 McKean Co., PA
 Perry Co., IN
 Potter Co., PA
 Somerset Co., NJ
 Southern Shore, NJ
 Vacaville, CA
 Whitefish, MT
 Woodson Co., KS

\$500,000-\$999,999

1000 Islands, NY
 Athens, GA
 Aurora, CO
 Aurora, IL
 Bellevue, WA
 Bellingham/Whatcom Co., WA
 Boise, ID
 Bowling Green, KY
 Brookfield, WI
 Brown Co., IN
 Calhoun Co., MI
 Carlsbad, CA
 Central Oklahoma, OK
 Champaign Co., IL
 Dalton, GA
 Davis, UT
 Dublin, OH
 Dunwoody, GA
 Eau Claire, WI
 Flagler Co., FL
 Fort Collins, CO
 French Lick West Baden, IN
 Fresno/Clovis, CA
 Gainesville, FL
 Galena/Jo Daviess Co., IL
 Greene Co., OH
 Hagerstown/Washington Co., MD
 Howard Co., MD
 Joplin, MO
 Lawrence, KS
 McAllen, TX
 Minneapolis NW, MN

\$500,000-\$999,999 (cont'd.)

Missoula, MT
 Norman, OK
 Ogden/Weber, UT
 Owensboro/Daviess Co., KY
 Oxnard, CA
 Paducah, KY
 Placer Valley, CA
 Pulaski Co., MO
 Randolph, NC
 Redding, CA
 River Parishes, LA
 Rogers, AR
 Roseville, MN
 Round Rock, TX
 Saratoga, NY
 Steuben Co., NY
 Stillwater, OK
 Stockton, CA
 Ventura, CA
 Wausau/Central Wisconsin, WI
 Woodward, OK

\$1,000,000-\$1,999,999

Abilene, TX
 Akron/Summit, OH
 Alpharetta, GA
 Annapolis/Anne Arundel Co., MD
 Berkshire, MA
 Bismarck-Mandan, ND
 Boulder, CO
 Butler Co., PA
 Casper, WY
 Charleston, WV

\$1,000,000-\$1,999,999 (cont'd.)

Charlottesville Albemarle, VA
 Cheyenne, WY
 Columbia, MO
 Cumberland Valley, PA
 Dayton/Montgomery Co., OH
 Evansville, IN
 Fargo-Moorhead, ND
 Flagstaff, AZ
 Frankenmuth, MI
 Frisco, TX
 Gettysburg, PA
 Holland, MI
 Juneau, AK
 Kalamazoo, MI
 Lake Havasu City, AZ
 LaPorte Co., IN
 Lynchburg, VA
 Macon/Bibb Co., GA
 Plano, TX
 Porter Co., IN
 Prince William & Manassas, VA
 Quad Cities, IA
 Racine, WI
 Rochester, MN
 Saint Paul, MN
 Sandy Springs, GA
 Temecula Valley, CA
 Topeka, KS
 Washington Co., PA
 West Hollywood, CA
 Yakima Valley, WA

RESPONDENTS – BUDGET SIZE (CONT'D.)

\$2,000,000-\$3,999,999

Alexandria, VA
 Amelia Island, FL
 Ann Arbor, MI
 Arlington, VA
 Baton Rouge, LA
 Colorado Springs, CO
 Columbia, SC
 Columbus, GA
 Des Moines, IA
 Duluth, MN
 Durham, NC
 Estes Park, CO
 Fairfax, VA
 Galveston Island, TX
 Greensboro, NC
 Greenville, TX
 Hampton, VA
 Huntington Beach, CA
 Huntsville/Madison Co., AL
 Jackson, MI
 Jacksonville, FL
 Knoxville, TN
 Lafayette, LA
 Lake Erie Shores & Islands, OH
 Lake Placid, NY
 Loudoun, VA
 Madison, WI
 Mammoth Lakes, CA
 Mobile Bay, AL
 Newport, RI
 Providence Warwick, RI

\$2,000,000-\$3,999,999 (cont'd.)

Rapid City, SD
 Rochester, NY
 Rockford, IL
 Santa Monica, CA
 Sioux Falls, SD
 Springfield, MO
 Tupelo, MS
 Washington Co., OR
 Winston-Salem, NC

\$4,000,000-\$9,999,999

Albuquerque, NM
 Anchorage, AK
 Bloomington, MN
 Cincinnati, OH
 Cleveland, OH
 Columbus, OH
 Daytona Beach, FL
 Fort Worth, TX
 Grand Rapids, MI
 Henderson, NV
 Irving, TX
 Lansing, MI
 Lexington, KY
 Little Rock, AR
 Memphis, TN
 Minneapolis, MN
 Monterey Co., CA
 Naples, Marco Island, Everglades, FL
 Newport Beach, CA

\$4,000,000-\$9,999,999 (cont'd.)

Northern Kentucky, KY
 Oklahoma City, OK
 Palm Beach Co., FL
 Palm Springs, CA
 Panama City Beach, FL
 Philadelphia, PA (GPTMC)
 Pittsburgh, PA
 Pocono Mountains, PA
 Portland, OR
 Raleigh, NC
 Richmond, VA
 Sacramento, CA
 Salt Lake City, UT
 Sarasota Co., FL
 Savannah, GA
 Seattle, WA
 Sioux City, IA
 Sonoma Co., CA
 Spokane, WA
 Toledo, OH
 Traverse City, MI
 Tucson, AZ

\$10,000,000 or more

Anaheim/Orange Co.
 Atlanta, GA
 Austin, TX
 Baltimore, MD
 Boston, MA
 Charleston, SC

\$10,000,000 or more (cont'd.)

Chicago, IL
 Dallas, TX
 Denver, CO
 Fort Lauderdale, FL
 Grapevine, TX
 Hawaii, HI
 Indianapolis, IN
 Kansas City, MO
 Kissimmee, FL
 Las Vegas, NV
 Los Angeles, CA
 Louisville, KY
 Miami, FL
 Myrtle Beach, SC
 Nashville, TN
 Orlando, FL
 Philadelphia, PA (CVB)
 Phoenix, AZ
 Reno Sparks, NV
 San Antonio, TX
 San Diego, CA
 San Francisco, CA
 Scottsdale, AZ
 St. Louis, MO
 Tampa Bay, FL
 Virginia Beach, VA
 Washington, DC

EXECUTIVE SUMMARY

DMOs Leverage Significant Buying Power for Destination Marketing

DMO investment in representing their destinations is substantial, well over one billion dollars per annum. Slightly less than one-third (30%) of this investment is devoted to marketing activities (including advertising, online and website efforts, consumer shows and promotions) less personnel.

Specific DMO expenditures (over the last three years) include almost \$70 million in advertising production; \$39 million in website and mobile applications development/programming and more than \$9 million in video and photography, totaling more than \$118 million.

	All DMO Respondents Combined	Average DMO*
Total DMO Budget	\$1,270,859,000	\$1,700,000
DMO Marketing Budget	\$375,807,000	\$500,000

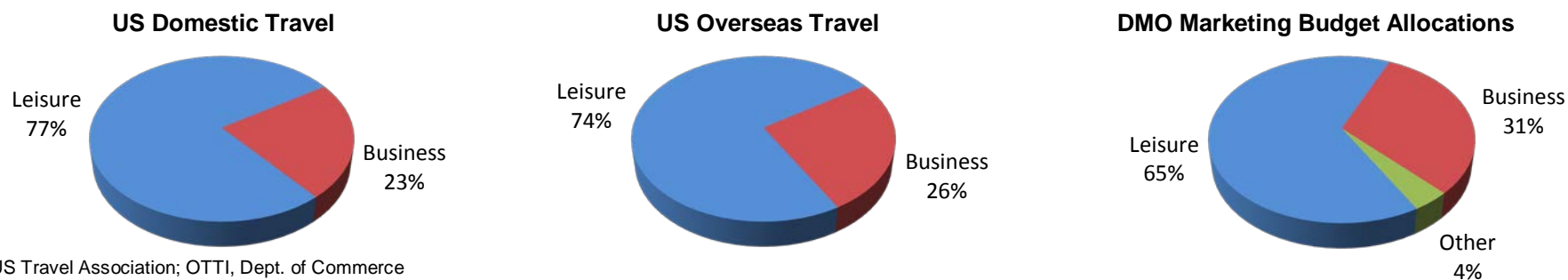
* median average; excludes Las Vegas

Investment in Last Three Years	All DMO Respondents Combined	Average DMO*
Advertising Production	\$69,628,000	\$262,117
Website, Mobile Apps	\$39,181,000	\$134,362
B-roll Video and/or Photography	\$9,332,000	\$45,440

* mean average

Leisure Travel Market Commands Largest Share of DMO Marketing Budget

Leisure travel dominates the US travel market, representing 77% of all domestic visitors and 74% of all overseas visitors¹. On average, DMOs commit two-thirds of their marketing budget to this lucrative market segment.



¹ US Travel Association; OTTI, Dept. of Commerce

DMOs Who Market Internationally Invest One-Third of Marketing Budget Outside the US

One-half of responding DMOs invest in marketing internationally, committing one-third of their total marketing budgets for the international leisure and meetings & conventions segments, with the vast majority going to leisure.

Canada, the United Kingdom and Germany are, by far, the most popular countries for DMOs. China, which has yet to realize its vast potential as a point-of-origin country, already ranks sixth among DMO investment.

Of those DMOs marketing internationally, one-third have a satellite office(s) or retain international representation. Top countries warranting representation include (in order): the United Kingdom, Germany, Canada, Mexico and France. On average, these DMOs have satellite offices/international representation in four countries.

	% of Total DMO Marketing Budget
International Leisure	29
International Meetings & Conventions	6

Where DMOs are Marketing (Top Ten Countries)	% of DMOs who Market Internationally
1. Canada	80
2. United Kingdom	72
3. Germany	72
4. Mexico	34
5. France	34
6. China	25
7. Japan	23
8. Australia	19
9. Italy	18
10. Brazil	18
DMO has International Representation/Satellite Office(s)	39

Traditional Marketing Still Commands Large Share of DMO Budget

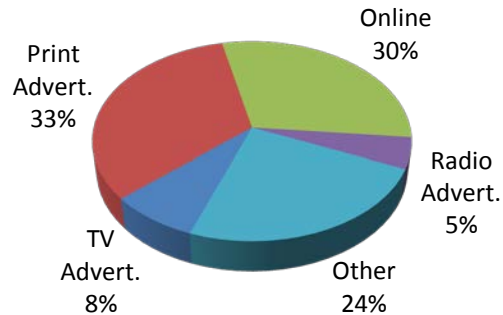
Although traditional marketing (print/broadcast advertising, consumer shows/events) still commands a large share of DMO leisure marketing dollars, there is a noticeable commitment toward digital marketing.

	% of Total DMO Marketing Budget
Traditional Marketing	63
Digital Marketing	34

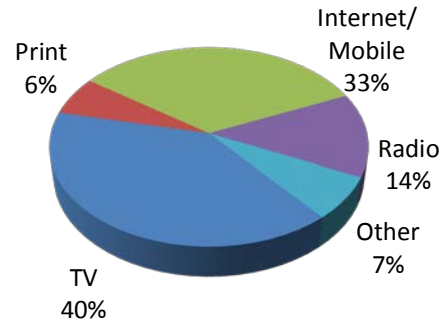
* sums do not total 100% due incomplete responses

DMOs have fairly matched their online leisure marketing budget allocation to US adult weekly online media consumption. Although television still accounts for 40% of media consumption, more than three-fourths multitask online while watching.

DMO Leisure Marketing Budget Allocation

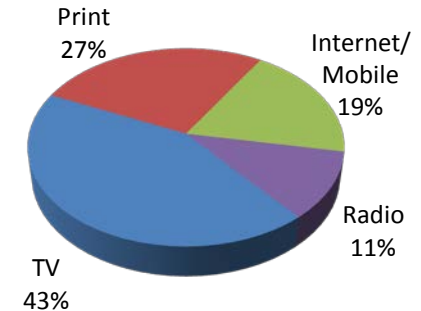


US Adult Weekly Media Consumption



Source: eMarketer.com

US Advertising Spending



Source: eMarketer.com

DMOs Integrate Online Activities, Especially Social Media, into Overall Marketing Efforts

DMOs have fully embraced a wide variety of online activities into their overall destination marketing efforts. Banner ads and search engine marketing (SEM)/adwords dominate, comprising more than half of DMO online budgets.

Social media is now a permanent element of destination marketing, with almost all responding DMOs present on Facebook, Twitter and YouTube.

	% of DMO Online Marketing Budget
Banner Ads	30
Adwords/Search Engine Marketing	28
Social Media Campaigns/Sites	18
Other	24

	% of DMO Respondents
DMO has Presence on:	
Facebook	98
Twitter	91
YouTube	88
Flickr	64

DMOs Continue to Invest in Websites, Adopt Mobile Sites over Apps

DMO websites continue to command a high level of investment as market expectations for more sophisticated content and functionality increase. More than three-fourths of DMOs use a Content Management System (CMS) and almost one-half have at least staff person devoted to website content management.

Almost all DMOs have or plan to have a *mobile version of their website* available by the end of 2012. The development of *destination apps* are moving at a much slower rate – about half of DMOs have or plan to have one ready to launch by the end of 2012.

	% of DMO Respondents
Has Content Management System for Website	81
Present on Website:	
Calendar of Events	99
Deals and Discounts	78
Mapping Technology	75
Online Booking Engine for Lodging	59
Trip or Itinerary Builder	47
User-generated Content	42

	% of DMO Respondents
Has/Plans to Have by End of 2012:	
Mobile Version of Website	92
Destination App	47

DETAILED RESEARCH FINDINGS

Marketing Budget

The average (median) DMO marketing budget, excluding personnel costs, is \$500,000*. The combined marketing budgets of the 240 responding DMOs is \$375,807,000.

(\$)	Total	Less than \$500,000	\$500,000-\$999,999	\$1,000,000-\$1,999,999	\$2,000,000-\$3,999,999	\$4,000,000-\$9,999,999	\$10,000,000 or More
Average Marketing Budget (median)	500,000*	72,500	313,500	460,370	1,003,300	1,831,770	3,650,000*

* excludes Las Vegas

Leisure vs. Meetings & Conventions Marketing Budget Allocation

On average, two-thirds of a DMO's marketing budget is allocated to leisure market activities. This percentage, however, rises to 83% among smaller destinations, typically less involved in the meetings and conventions market.

(% of Total Marketing Budget)	Total	Less than \$500,000	\$500,000-\$999,999	\$1,000,000-\$1,999,999	\$2,000,000-\$3,999,999	\$4,000,000-\$9,999,999	\$10,000,000 or More
Leisure	65	83	63	63	63	58	68
Meetings & Conventions	31	15	34	37	32	38	26
Other	4	2	3	0	5	4	6

Marketing Investment in Last Three Years

DMOs spent a total of \$69.63 million in advertising production in the last three years with an additional \$39.18 million in technology (website development and programming, mobile applications). B-roll video/photography saw a \$9.33 million investment. Average investment in these three areas appears to be predominately a function of budget size.

(Average Investment - \$)*	Total	Less than \$500,000	\$500,000-\$999,999	\$1,000,000-\$1,999,999	\$2,000,000-\$3,999,999	\$4,000,000-\$9,999,999	\$10,000,000 or More
Advertising Production	262,117	44,258	96,159	128,464	235,245	523,182	751,569
Website, Mobile Apps	134,362	13,455	50,031	85,941	140,016	185,508	870,392
B-roll video and/or Photography	45,440	6,097	12,546	19,703	29,547	77,182	166,806

* average investment figures exclude Las Vegas

DMO INTERNATIONAL MARKETING ACTIVITIES

Budget Allocation for International Marketing

DMOs, in general, allocate one-third of their total marketing budget to international marketing with leisure market activities outstripping the meetings and conventions market by a five-to-one margin. Overall budget allocation to international marketing grows to more than half among the very large DMOs.

(% of Total Marketing Budget)	Total	Less than \$500,000	\$500,000-\$999,999	\$1,000,000-\$1,999,999	\$2,000,000-\$3,999,999	\$4,000,000-\$9,999,999	\$10,000,000 or more
Leisure	29	<1	25	32	14	32	43
Meetings & Conventions	6	5	4	6	<1	5	11

International Marketing Presence

One-half of DMOs have committed marketing dollars to the international visitor marketplace. The choice of specific countries somewhat parallels that country's visitor and visitor spending levels to the US as well as the cost of doing business in that country. Canada, the United Kingdom and Germany are the top three international visitor markets for DMO involvement.

Not surprisingly, the larger destinations, many of whom are long-standing destinations for international visitors, are more active in terms of dollars spent and the number of countries where they have a marketing presence.

US Visitors Country of Origin 2011*	(% of DMO Respondents)	Total	Less than \$500,000**	\$500,000- \$999,999	\$1,000,000- \$1,999,999	\$2,000,000- \$3,999,999	\$4,000,000- \$9,999,999	\$10,000,000 or more
	Market Internationally	52	16	37	50	47	69	77
	Countries Present:							
21,028,000	Canada	80	50	83	65	79	82	95
3,835,000	United Kingdom	72	50	61	59	57	86	90
1,824,000	Germany	72	50	72	76	57	73	80
13,414,000	Mexico	34	25	28	12	7	36	75
1,504,000	France	34	--	17	29	14	45	60
1,089,000	China	25	--	17	29	21	18	45
3,250,000	Japan	23	--	17	24	7	27	40
1,038,000	Australia	19	--	22	6	21	18	30
892,000	Italy	18	--	11	18	--	9	50
1,508,000	Brazil	18	--	6	6	7	14	55
3,904,000	Other Europe	15	--	6	29	14	14	15
700,000	Spain	9	--	6	--	7	5	30
512,000	Argentina	7	--	--	--	--	--	35
1,737,000	Other South America	6	--	--	--	--	5	25
747,000	Central America	5	--	--	--	--	--	25
222,000	Russia	4	--	6	--	--	5	10
663,000	India	4	--	--	--	--	--	20
2,908,000	Other Asia	3	--	--	--	--	--	15
811,000	Middle East	2	--	6	--	--	--	5

* Source: OTTI, Dept. of Commerce

** small sample size; directional only

International Market Prioritization

Canada, the United Kingdom and Germany are the three top priority ranked international visitor markets for the majority of DMOs (Germany slips slightly below Mexico for the \$10,000,000+ budget range). China, which has grown to the sixth largest international visitor market in terms of visitor spending and ninth in visitation (forecasted to reach fifth place in 2015)¹, ranks ninth in priority overall but at a higher level for several individual DMO budget ranges.

Priority Ranking	Overall	\$500,000-\$999,999*	\$1,000,000-\$1,999,999*	\$2,000,000-\$3,999,999*	\$4,000,000-\$9,999,999*	\$10,000,000 or more	Priority Ranking
1	Canada	Canada	Canada	United Kingdom	Canada	Canada	1
2	United Kingdom	United Kingdom	United Kingdom	Canada	United Kingdom	United Kingdom	2
3	Germany	Germany	Germany	Germany	Germany	Mexico	3
4	Mexico	Mexico	Italy	China	Mexico	Germany	4
5	Australia	France	China	Australia	France	Brazil	5
6	France	Australia	France		China (tie)	Australia	6
7	Brazil	China	Brazil		Australia (tie)	France	7
8	Other Europe	Japan	Other Europe		Brazil	Argentina	8
9	China		Japan		Japan	Japan	9
10	Japan				Other Europe	China	10
11	Argentina					Other Europe	11
12	Other Latin America					Other Latin America	12
13	Italy					Italy	13
14	Russia					Spain	14
15	Spain					Central America	15
16	Central America					India	16
17	India					Other Asia	17
18	Other Asia						18

Note: Three DMO response rankings per country required for a statistically valid ranking.

* insufficient sample size for less than \$500,000 budget range; small sample sizes for remaining budget categories except \$10,000,000 or more; directional only

¹ Source: OTTI, Dept. of Commerce

DMO International Representation/Satellite Office

Having international representation and/or a satellite office abroad remains the domain of the larger DMOs with 85% of those budgeted at \$10,000,000+ and 50% at the \$4,000,000-\$9,999,999 budget range making this financial investment. On average, these DMOs have satellite offices/international representation in four countries.

The United Kingdom and Germany are the top two countries of choice for this level of marketing investment. The larger DMOs, averaging more than five countries, have an expanded presence in Canada, Mexico and Argentina with France, Brazil and China comprising the second tier.

(% of DMO Respondents who Market Internationally)	Total	Less than \$500,000*	\$500,000-\$999,999*	\$1,000,000-\$1,999,999*	\$2,000,000-\$3,999,999*	\$4,000,000-\$9,999,999	\$10,000,000 or More
Int'l. Representation/Satellite Office	39	25	22	6	21	50	85

* small sample size; directional only

(% of DMO Respondents who have Int'l. Representation/Satellite Office)	Total	\$4,000,000-\$9,999,999*	\$10,000,000 or More
Average Number of Countries	3.8	2.6	5.6
Int'l Rep./Satellite Office in:			
United Kingdom	84	82	88
Germany	65	73	71
Canada	38	9	59
Mexico	30	9	53
France	27	27	35
Australia	24	27	18
China	19	9	35
Japan	19	18	29
Argentina	19	--	41
Brazil	16	--	35
Italy	11	--	24
Spain	8	--	18
Other Latin America	8	--	18
India	5	--	12
Central America	5	--	12
Other Europe	3	--	6
Other Asia	3	--	6

Note: Sufficient response only for two DMO budget ranges

* small sample size; directional only

DMO DIGITAL MARKETING ACTIVITIES

Traditional vs. Digital Marketing Budget Allocation

Traditional marketing (print/broadcast advertising, consumer shows/events) still commands the larger share of DMO leisure marketing dollars, though there is a noticeable commitment toward digital marketing, especially among the larger DMOs.

(% of Total Marketing Budget)	Total	Less than \$500,000	\$500,000-\$999,999	\$1,000,000-\$1,999,999	\$2,000,000-\$3,999,999	\$4,000,000-\$9,999,999	\$10,000,000 or More
Traditional Marketing	63	77	61	67	62	57	57
Digital Marketing	34	20	37	30	35	43	38

* sums do not total 100% due to incomplete responses

Budget Allocation for Specific Leisure Marketing Activities

Print advertising, long a mainstay of DMO leisure marketing, is steadily giving way to digital marketing, especially online display/banners – in terms of share of DMO marketing budgets. Social media efforts have overtaken radio and billboard advertising as well as direct mail, and are on par with TV/cable advertising, especially among the smaller DMOs.

(% of Total Marketing Budget)	Total	Less than \$500,000	\$500,000-\$999,999	\$1,000,000-\$1,999,999	\$2,000,000-\$3,999,999	\$4,000,000-\$9,999,999	\$10,000,000 or More
Print Advertising	33	49	34	36	35	23	22
Online Display/Banners	14	7	12	10	13	20	22
Consumer Shows/Events	10	17	11	11	5	10	4
Search Engine Optimization/ Pay-per-Click	9	2	9	8	15	11	11
TV/Cable Advertising	8	5	5	5	12	11	16
Social Media	7	7	8	7	7	8	6
Radio Advertising	5	5	5	8	5	4	4
Outdoor Advertising (billboards, transit, etc.)	5	3	5	5	5	7	5
Direct Mail	2	4	4	2	1	1	1
Other**	5	1	6	9	1	4	10

* sums do not total 100% due to rounding

** video, airport display, gorilla marketing, promotional programs, miscellaneous programs

Outside Agency for Print, Broadcast, Online Marketing Campaign Development & Media Placement

The use of an outside agency is overwhelmingly more common among larger DMOs – 92% of DMOs with \$10 million+ compared to 16% for DMOs under \$500,000. Having more than one agency also increases with budget size, except in the \$10 million+ budget range, where, possibly, the agency of record is more likely to already offer a full range of print, broadcast and online services.

(% of DMO Respondents)	Total	Less than \$500,000	\$500,000-\$999,999	\$1,000,000-\$1,999,999	\$2,000,000-\$3,999,999	\$4,000,000-\$9,999,999	\$10,000,000 or more
Outside Agency	55	16	41	50	77	63	92
More than one agency for print, broadcast, online (% of who have outside agency)	45	25	25	35	57	75	38

Online Marketing Budget Allocation

Banner ads and adwords/search engine marketing comprise more than half of DMO online marketing budgets, except among small DMOs who are far more likely to allocate up to one-third of their budget to social media campaigns and sites.

Google, by far, garners the lion's share of the DMO adwords/search engine marketing budget, commanding, on average, 72%.

(% of Online Marketing Budget)	Total	Less than \$500,000	\$500,000-\$999,999	\$1,000,000-\$1,999,999	\$2,000,000-\$3,999,999	\$4,000,000-\$9,999,999	\$10,000,000 or More
Banner ads	30	18	32	22	32	37	34
Adwords/Search Engine Mktg	28	8	25	31	41	30	29
<i>% spent on Google</i>	<i>72</i>	<i>55</i>	<i>70</i>	<i>68</i>	<i>72</i>	<i>70</i>	<i>88</i>
Social Media Campaigns/Sites	18	32	23	18	12	12	9
OTA Campaigns	6	3	4	5	4	10	10
Mobile Campaigns	5	6	5	8	3	4	3
Email List Acquisition	3	5	3	6	2	2	4
App Development	2	1	4	2	1	3	3
Other*	6	10	5	8	4	4	9

* online video, consumer sites, microsites, webinar sponsorships, development, lead generation, retargeting (one mention each)

Social Media Activity

DMOs have embraced and integrated social media into their overall marketing efforts. Not surprisingly, almost all DMOs have a presence on Facebook, averaging more than 4000 followers. Twitter is a close second, with close to 2,000 followers. A fairly new social media site, Pinterest, a theme-based, photo sharing website launched in 2011, is rapidly being embraced by DMOs, with one-half of large DMOs already using the site to visually share their destination.

(% of DMO Respondents)	Total	Less than \$500,000	\$500,000-\$999,999	\$1,000,000-\$1,999,999	\$2,000,000-\$3,999,999	\$4,000,000-\$9,999,999	\$10,000,000 or More
Facebook	98	96	98	100	93	97	100
Total fans/followers	4,869,121	28,449	169,348	263,209	311,019	1,593,906	2,503,190
Ave. # fans/followers (mean)	22,607	1,237	3,603	9,076	11,108	53,130	96,277
Ave. # fans/followers (median)	4,208	550	1,572	3,077	9,500	22,497	33,455
Twitter	91	50	100	93	90	97	100
Total fans/followers	837,995	8,355	56,260	60,839	110,489	217,182	384,870
Ave. # fans/followers (mean)	4,929	696	1,172	2,253	4,092	7,239	14,803
Ave. # fans/followers (median)	1,950	260	825	1,563	2,200	5,194	10,250
YouTube	88	50	78	90	87	94	100
Flickr	64	21	55	63	70	78	92
Google+	36	8	31	20	40	56	58
SCVNGR	9	0	2	3	13	19	19
Other*	36	13	37	23	32	52	58
Pinterest**	29	8	29	17	7	41	50
foursquare**	8	4	8	3	7	9	19
LinkedIn**	4	4	4	0	3	6	8

* 'Other' mentions also included Instagram, MySpace, Picasa, Delicious, Foodspotting, Alexa

** Significant write-ins for 'other'

Almost three-fourths of DMOs are leveraging social media to increase their following and promote the destination brand. Larger DMOs, with greater resources and bandwidth, lead in embracing this marketing activity.

(% of DMO Respondents)	Total	Less than \$500,000	\$500,000-\$999,999	\$1,000,000-\$1,999,999	\$2,000,000-\$3,999,999	\$4,000,000-\$9,999,999	\$10,000,000 or More
Social Media Campaigns to Acquire more Followers/Promote Brand	72	50	56	83	80	80	92

Mobile Activity

DMOs continue their forays into technology-based marketing with the development of a mobile version of their website. Almost all DMOs (92%) have/will have a mobile website by the end of 2012. Currently, 71% have a mobile version with no dramatic difference between most budget ranges except those under \$500,000. Of the remaining 29%, almost three-fourths plan to have a mobile website completed in 2012.

Destination apps are experiencing a much slower adoption rate among DMOs. Currently, only 29% have a destination app, slightly higher for the larger DMOs. 2012 should see the smaller DMOs catching up, with roughly half of all DMOs having one by the end of 2012.

Platforms for the iPhone/iPad and Android dominate with a Windows version a distant third.

(% of DMO Respondents)	Total	Less than \$500,000	\$500,000-\$999,999	\$1,000,000-\$1,999,999	\$2,000,000-\$3,999,999	\$4,000,000-\$9,999,999	\$10,000,000 or More
Has Mobile Version of Website							
Yes	71	54	67	72	87	70	77
No	29	46	33	28	13	30	23
Planning for 2012	72	36	69	75	75	100	100
<i>(Net) - Has/Plans to Have</i>	92	71	90	93	97	100	100
Destination App							
Yes	29	8	21	31	37	33	46
No	71	92	79	69	63	67	54
Planning for 2012	26	41	34	30	16	10	7
<i>(Net) - Has/Plans to Have</i>	47	46	48	52	47	40	50
Destination App Platforms:							
iPhone	95	82	100	93	100	100	92
Android	78	82	83	67	79	83	77
iPad	64	55	70	60	57	67	69
Windows	22	36	26	13	0	33	23
Other*	9	0	0	13	14	8	23

* BlackBerry (five mentions)

Mobile Activity

Having foreign language mobile websites does not appear as a 'must-have' for the vast majority of DMOs at this time. Of those who have made the investment, Spanish and French figure most prominently.

(% of DMO Respondents with Mobile Website)	Total	Less than \$500,000	\$500,000-\$999,999	\$1,000,000-\$1,999,999	\$2,000,000-\$3,999,999	\$4,000,000-\$9,999,999	\$10,000,000 or More
Mobile Website Languages							
English Only	92	77	97	90	100	86	90
Spanish	7	8	3	10	0	14	10
French	5	15	0	10	0	10	0
Italian	1	0	0	0	0	5	0
Chinese	2	0	0	5	0	10	0
German	5	8	0	10	0	10	5
Japanese	3	8	0	5	0	10	0
Korean	1	0	0	0	0	5	0
Portuguese	1	0	0	0	0	0	5

Note: small sample sizes, results directional only

Consumer Email Activity

Almost all DMOs have active consumer databases. Average database sizes range from 5,000 to almost 200,000 records with a few larger DMOs maintaining databases well over 500,000 records.

(% of DMO Respondents)	Total	Less than \$500,000	\$500,000-\$999,999	\$1,000,000-\$1,999,999	\$2,000,000-\$3,999,999	\$4,000,000-\$9,999,999	\$10,000,000 or More
Has A Consumer Email Database	91	80	84	97	93	94	100
Total Active/Clean Records	10,206,622	103,350	817,706	697,979	1,093,993	2,763,800	4,729,794
Average Number of Active/Clean Records (mean)	58,324	5,168	19,944	21,812	39,071	95,303	189,192
Average Number of Active/Clean Records (median)	17,000	3,100	6,500	11,990	25,000	50,000	75,000

Website

DMOs' commitment to their website continues to grow with 40% committing significant staff resources to content management. Content management systems are used by more than three-fourths of DMOs with simpleview holding an overall 25% market share in a crowded marketplace.

The presence of user-generated content on DMO websites is not universal, with fewer than half including it. It does not appear that budget is the determining factor (only 62% of larger DMOs include) nor does being a membership-based DMO. For those DMOs who do include, TripAdvisor is the dominant third party content provider, at 70%.

(% of DMO Respondents)	Total	Less than \$500,000	\$500,000-\$999,999	\$1,000,000-\$1,999,999	\$2,000,000-\$3,999,999	\$4,000,000-\$9,999,999	\$10,000,000 or More
Website Content Manager on Staff	40	21	25	41	50	50	62
Has Content Management System	81	46	85	66	93	90	100
CMS – (write-in responses)*							
simpleview	25	9	12	37	25	41	27
Customized/In-house	17	36	10	37	25	15	15
WordPress	17	9	27	32	4	15	12
Drupal	8	18	10	0	11	7	8
Joomla!	6	9	7	5	4	0	12
Other**	27	36	34	5	29	15	27
* small sample size for individual budget categories, directional only. Sums do not total 100% due to multiple responses or 'don't know' response.							
** iDSS, Expression Engine (four mentions); Ektron (3); CivicPlus, Sitecore, Aristotle, MODX (two each); Web GenX, ICE, Solodev, Javelin, GenConsensus (one each)							
User-generated Content on Website	42	21	31	38	40	63	62
Integrated Third Party Content *							
TripAdvisor	70	40	80	64	69	68	75
Yelp.com	15	0	20	18	15	16	13
Urbanspoon	6	0	7	0	0	11	13
Zagat	4	0	0	0	0	11	6
Other**	33	60	27	27	31	32	38

* small sample size for individual budget categories, directional only. Sums do not total 100% due to multiple responses

** includes single mentions of OpenTable, YouTube, local event database

Website (cont'd.)

Website functionality is largely determined by the DMO's size, though a few elements are common for the majority, including having a calendar of events, deals and discounts, mapping technology and the ability to book lodging. Google Maps is by far the preferred mapping provider. Travelocity, JackRabbit and aRes are the three most popular booking engines.

(% of DMO Respondents)	Total	Less than \$500,000	\$500,000-\$999,999	\$1,000,000-\$1,999,999	\$2,000,000-\$3,999,999	\$4,000,000-\$9,999,999	\$10,000,000 or More
Present on DMO Website							
Calendar of Events	99	96	98	100	100	100	100
Deals and Discounts	78	46	75	86	83	83	96
Trip or Itinerary Builder	47	17	31	59	59	63	58
Voluntourism Opportunities	17	25	15	10	21	17	15
Mapping Technology on Website	75	33	71	72	90	87	96
Provider							
Google Maps	89	88	82	95	85	96	92
Mapquest	8	13	12	5	4	12	4
Bing	3	13	0	0	4	4	4
Other*	8	13	9	5	12	4	8
* MicroMaps, in-house (three mentions); BatchGeo, Fairlight Interactive, NAVTEQ, Three Scale Strategy, CivicPlus (one each)							
Online Booking Engine for Lodging on DMO Website	59	8	48	55	77	87	77
Provider*							
Travelocity	35	0	26	44	39	42	25
JackRabbit	24	50	39	31	26	15	5
aRes Travel	22	50	22	13	13	19	40
Orbitz	3	0	0	0	0	4	10
Hotels.com	2	0	0	0	0	8	0
Regatta Travel Solutions	2	0	0	6	0	4	0
Other**	17	0	17	13	22	12	25

* small sample size; results directional only

** in-house (six mentions); Expedia, travelHERO.com, Priceline/booking.com (2 each); Travelocity, WorldRes, IHS, KAYAK, World Choice Travel, Meridian Reservation Systems (one each)

Website (cont'd.)

Slightly more than two-thirds of DMOs use customer relationship management (CRM) software. This percentage drops to 21% among those DMOs with budgets under \$500,000. Simpleview leads the CRM market with SMI/D3000 and iDSS vying closely for second. Integrating CRM with the website is prevalent among DMOs.

(% of DMO Respondents)	Total	Less than \$500,000	\$500,000-\$999,999	\$1,000,000-\$1,999,999	\$2,000,000-\$3,999,999	\$4,000,000-\$9,999,999	\$10,000,000 or More
Uses Customer Relationship Management (CRM) Software	68	21	65	62	80	87	92
CRM Provider							
simpleview	41	20	23	50	42	62	38
SMI/D3000	19	0	16	11	33	12	25
iDSS	17	20	32	11	13	19	4
Ungerboeck	5	0	0	6	0	4	21
Other*	23	60	29	22	13	4	13
* custom-built, INFO, Sage ACT! (three mentions each); Paradiso, Salesforce (two each), Constant Contact, GenConsensus, Honeycomb (single mentions)							
Website and CRM integrated*	71	100	55	33	79	85	92

* small sample sizes, results directional only

The presence of advertising (other than paid listings) on the DMO's website is not uncommon, with 40% including it. The very large DMOs (budgets greater than \$10 million), however, are more likely to have the resources to pursue this revenue stream. For those who do, the responsibility for selling the advertising generally falls to the in-house staff, with a shift towards using an outside agency among larger DMOs.

(% of DMO Respondents)	Total	Less than \$500,000	\$500,000-\$999,999	\$1,000,000-\$1,999,999	\$2,000,000-\$3,999,999	\$4,000,000-\$9,999,999	\$10,000,000 or More
Advertising on DMO Website (other than paid listings)	40	17	31	38	45	47	69
How Ads Are Sold*							
In-house Staff	68	100	80	82	69	50	56
Outside Agency	43	0	20	45	38	57	61

* multiple choice

Website (cont'd.)

Unlike mobile websites, DMO websites are more likely to be translated into languages other than English with the larger DMOs taking the lead for multiple languages. In general, Spanish, German and French are the primary languages for translation with Japanese and Chinese comprising the second tier.

(% of DMO Respondents)	Total	Less than \$500,000	\$500,000-\$999,999	\$1,000,000-\$1,999,999	\$2,000,000-\$3,999,999	\$4,000,000-\$9,999,999	\$10,000,000 or More
DMO Website Languages							
English Only	68	88	77	72	79	43	46
Spanish	26	4	23	24	10	50	42
German	22	4	13	24	14	47	31
French	21	8	13	24	10	43	31
Japanese	17	4	10	21	10	33	27
Chinese	13	0	10	17	10	17	27
Italian	11	0	8	10	7	17	23
Portuguese	9	0	4	10	3	7	31
Korean	7	0	6	7	3	10	15
Russian	4	0	4	7	0	3	12
Arabic	3	0	4	7	0	3	4
Other*	8	4	4	3	7	13	15

* Google Translator Plug-in, homepage/partial website translated (four mentions); Dutch, Scandinavian (one each)

Appendix: Questionnaire

Thank you for taking the time to complete DMAI's *DMO Marketing Activities Study* questionnaire. It should take about ten minutes to complete and will provide valuable insight into how DMOs plan, allocate and execute their marketing budgets. As a thank you, all respondents will receive a complimentary summary of the key findings and a 20% discount for the full results. If you need to leave this survey before you have completed it, you can return to where you left off at any time by clicking on the link that was emailed to you. Please click below to continue. Thank you!

1. Name of DMO: _____
2. Contact Name: _____
3. What is your DMO's total budget for the current fiscal year? _____
4. What is your DMO organizational structure?
 501(c)(6) City Gov't. Agency Other (please specify)
 501(c)(3) County Gov't. Agency
 Chamber of Commerce Quasi-gov't. Entity/Authority
5. What is your DMO's total marketing budget for the current fiscal year? _____
Include all monies spent on advertising [print, broadcast, online, outdoor, etc.], public and press relations, publications & printing, direct mail, list subscriptions, research, promotional items, etc. Do not include staff costs, extraordinary web development or media production.
6. What percentage of your DMO's marketing budget is spent on the *leisure market (consumer and travel trade)* versus the *meetings and conventions* market?
Leisure: _____% Meetings and conventions: _____%
7. Over the last three years in aggregate, please estimate how much your DMO has spent on:
 - a. Advertising production: \$ _____
 - b. B-roll video or photography: \$ _____
 - c. Web development, programming and/or mobile applications such as smartphone apps [Do NOT include costs for separate website/mobile apps for the meetings/conventions market]: \$ _____
8. What percentage of your DMO's leisure marketing budget goes to :
 - a. Traditional marketing (e.g., broadcast/print advertising, consumer shows/events): _____%
 - b. Digital marketing (e.g., search, social media): _____%
9. Please estimate what percentage of your DMO's leisure marketing budget goes to:
 - a. Print Advertising
 - b. TV/Cable
 - c. Radio
 - d. Outdoor Advertising (billboards, transit, etc.)
 - e. Direct Mail
 - f. SEO/Pay-per-click
 - g. Online Display/Banners
 - h. Social Media
 - i. Consumer Shows/Events
 - j. Other (Please Specify): _____
10. Do you employ an outside agency to assist in campaign development and media placement for traditional print, broadcast or online marketing? yes no
If yes, do you have more than one agency for print, broadcast and online activities? yes no
11. Does your DMO have a consumer email database? yes no
If yes, approximately how many (active/clean) records does the database have: _____

International

12. Does your DMO market internationally? yes no

If yes, check all the international markets that your DMO has a marketing presence and rank them in order of importance/budget allocation:

- | | | | |
|---|---------------------------------------|-------------------------------------|--|
| <input type="checkbox"/> Canada | <input type="checkbox"/> Germany | <input type="checkbox"/> Japan | <input type="checkbox"/> Argentina |
| <input type="checkbox"/> Mexico | <input type="checkbox"/> Spain | <input type="checkbox"/> India | <input type="checkbox"/> Other Latin America |
| <input type="checkbox"/> United Kingdom | <input type="checkbox"/> Russia | <input type="checkbox"/> Other Asia | <input type="checkbox"/> Central America |
| <input type="checkbox"/> France | <input type="checkbox"/> Other Europe | <input type="checkbox"/> Australia | <input type="checkbox"/> Africa |
| <input type="checkbox"/> Italy | <input type="checkbox"/> China | <input type="checkbox"/> Brazil | <input type="checkbox"/> Middle East |

13. Does your DMO have an enhanced international presence in the form of retained representation or a satellite office(s)? yes no

If yes, please check the locations where you have a satellite office or retain representation:

- | | | | |
|---|---------------------------------------|-------------------------------------|--|
| <input type="checkbox"/> Canada | <input type="checkbox"/> Germany | <input type="checkbox"/> Japan | <input type="checkbox"/> Argentina |
| <input type="checkbox"/> Mexico | <input type="checkbox"/> Spain | <input type="checkbox"/> India | <input type="checkbox"/> Other Latin America |
| <input type="checkbox"/> United Kingdom | <input type="checkbox"/> Russia | <input type="checkbox"/> Other Asia | <input type="checkbox"/> Central America |
| <input type="checkbox"/> France | <input type="checkbox"/> Other Europe | <input type="checkbox"/> Australia | <input type="checkbox"/> Africa |
| <input type="checkbox"/> Italy | <input type="checkbox"/> China | <input type="checkbox"/> Brazil | <input type="checkbox"/> Middle East |

14. What percentage of your total marketing budget is spent on international marketing efforts? (include both meetings and leisure marketing segments)

a. International meetings: _____% International leisure: \$_____%

Online Marketing and Website

15. Please estimate what percentage of your online marketing budget is spent on:

- | | |
|--|---|
| a. Adwords/Search engine marketing (e.g., Google, Bing, Yahoo)
What % of this is spent on Google? _____ | d. Mobile Campaigns (excl. app development) |
| b. Banner Ads | e. Social Media campaigns/Sites |
| c. Email List Acquisition | f. OTA Campaigns (e.g., Orbitz, Travelocity, Expedia) |
| | g. Other (please specify): _____ |

16. Does your DMO have an active account, website or channel established with any of the following? (Check all that apply)

- | | |
|---|---------------------------------------|
| <input type="checkbox"/> Facebook. How many fans/followers? _____ | <input type="checkbox"/> Flickr |
| <input type="checkbox"/> Twitter. How many fans/followers? _____ | <input type="checkbox"/> SCVNGR |
| <input type="checkbox"/> Google+ | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> YouTube | |

17. Does your DMO regularly run campaigns or promotions using social media to acquire more followers and/or promote your brand? yes no

18. Do you have a Content Manager solely dedicated to your website(s) on staff? yes no

[For the next section, if your DMO has a separate consumer/leisure-oriented website, please answer the remaining questions for that website. If your DMO has only ONE website, please answer the remaining questions for that website.]

19. Do you support a mobile version of your website? yes no

If no, do you plan on developing/supporting one in 2012? yes no

20. Have you developed a destination app? yes no
 If yes, for which platforms? iPhone iPad Android Windows Other: _____
 If no, do you plan to develop one in 2012? yes no
 If yes, for which platforms? iPhone iPad Android Windows Other: _____
21. Do you use a content management system (CMS)? yes no
 If yes, which CMS do you use? (e.g., Wordpress, Druple, Joomla): _____
22. Do you use Customer Relationship Management (CRM) software? yes no
 If yes, which CRM vendor do you use?
 simpleview USDM.net iDSS
 Ungerboeck SMI/D3000 Other: _____
 If yes, is your website integrated with your CRM? yes no
23. Do you have an online booking engine for lodging on your DMO website? yes no
 If yes, which online booking engine do you use?
 hotels.Com Orbitz Other (please specify): _____
 aRes Travel JackRabbit
 Travelocity Regatta Travel
24. Do you support user-generated content on the DMO website? yes no
 If yes, do you integrate content from any of the following third party sites?
 TripAdvisor Zagat Other: _____
 Urbanspoon Yelp.Com Other: _____
25. Please indicate which of the following are supported on your website:
 Trip or itinerary builder Deals and discounts Other: _____
 Calendar of events Voluntourism opportunities none
26. Does your site support mapping technology? yes no
 If yes, which provider? Google Maps Mapquest Bing Other: _____
27. Does your website support advertising (other than paid listings)? yes no
 If yes, do you sell ads: directly with in-house staff through an outside agency?
28. In what languages, other than English, is your website? (Please select all that apply.)
 Spanish Arabic Japanese Russian
 French Chinese Korean None (English only)
 Italian German Portuguese
29. In what languages, other than English, is your mobile website? (Please select all that apply.)
 Spanish Arabic Japanese Russian
 French Chinese Korean None (English only)
 Italian German Portuguese

ABOUT DESTINATION MARKETING ASSOCIATION INTERNATIONAL

Destination Marketing Association International (DMAI) protects and advances the success of destination marketing worldwide. DMAI's influential membership includes nearly 600 official destination marketing organizations (DMOs), also known as tourism boards or Convention and Visitor Bureaus) from nearly 20 countries that command \$1.5 billion in annual budgets. As the world's largest and most reliable resource for DMOs, it provides more than 3,000 individual members – professionals, industry partners, educators and students – the most innovative and relevant educational resources, networking opportunities and marketing intelligence worldwide.

ABOUT THE DESTINATION & TRAVEL FOUNDATION

The Destination & Travel Foundation is a combined effort between the Destination Marketing Association International and the U.S. Travel Association to serve the interests of destination marketing professionals and highlight the impact of travel around the world. The mission of the Destination & Travel Foundation is to enhance the destination marketing and travel professions through research, education, visioning and development of resources and partnerships for those efforts.

Destination Marketing Association International

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