

# THE IMPACT OF DMO VISITOR GUIDES

2020-2021 DMO Visitor Guide Readership & Conversion Study

Executive Summary of Key Findings

November 2021

**DMAwest**  
destination marketing association of the west  
education & research foundation

Destination  Analysts



COOPERATIVE STUDY CONDUCTED ON BEHALF OF THE  
DMA WEST EDUCATION & RESEARCH FOUNDATION  
BY DESTINATION ANALYSTS, INC.



WITH THANKS TO MILES PARTNERSHIP  
FOR ITS SUPPORT OF THIS RESEARCH

# RESEARCH OVERVIEW & OBJECTIVES

- Develop a profile of those who use DMO official visitor guides
- Identify the content and features most important to visitor guide readers
- Understand the effectiveness of DMO official visitor guides
- Examine the level to which DMO official visitor guides convert its readers into visitors
- Ultimately estimate the economic impact DMO official visitor guides generate for their respective communities

# METHODOLOGY

- Quarterly online survey of official DMO visitor guide requestors
- 12 U.S. DMOs
- 5,691 total surveys collected between April 2020 – July 2021





# PARTICIPATING DMOs

Visit  
**LUBBOCK**

explore  
**FAIRBANKS**  
ALASKA

*Olympic*  
PENINSULA

*Tualatin Valley*  
OUR OREGON

VISIT *Casper*

GREATER  
**ZION**

  
VISIT YOSEMITE  
MADERA COUNTY



visit  
**TUOLUMNE**  
county

**tempe**  
Refreshingly  
arizona

**GJ** GRAND JUNCTION  
COLORADO

SEATTLE  
**SOUTHSIDE**  
Regional Tourism Authority



GRAND JUNCTION  
COLORADO  
ADVENTURE GUIDE

It all comes  
**TOGETHER**  
HERE

GRAND JUNCTION

OFFICIAL TRAVEL GUIDE

TUCS

# BACKGROUND: VISITOR GUIDE USAGE

SAGUARO NATIONAL PARK

*Tualatin Valley*

O U R O R E G O N

Discover the Tualatin River,  
Hagg Lake & More

Best Scenic Routes & Trails

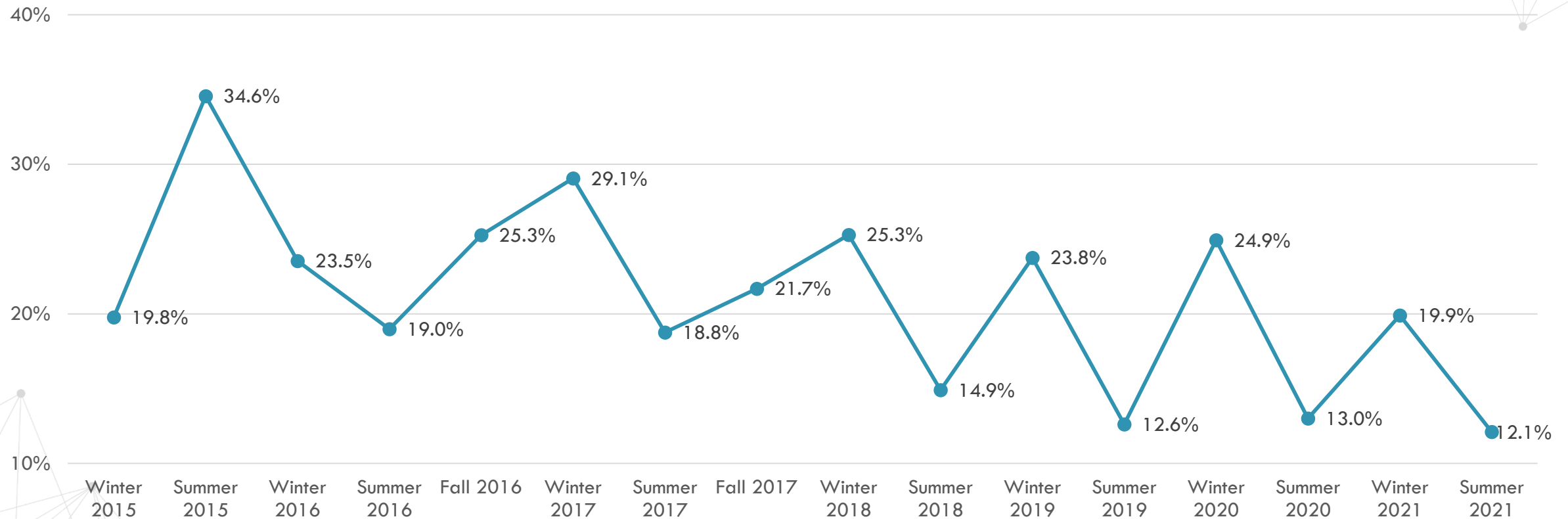
Guide to Wineries & Breweries

Places to Stay, Play & Dine

2021 - 2022 Official Visitors Guide



# USED AN OFFICIAL DMO VISITORS GUIDE IN THE PAST 12 MONTHS



Q: In the past 12 months, have you used an official visitors publication (eg: an official vacation planning guide) from a Visitors or Convention Bureau or state or national government travel office?

Source: Destination Analysts' *The State of the American Traveler*



# THE ECONOMIC IMPACT OF DMO VISITOR GUIDES



# RETURN ON INVESTMENT DEFINED

- **Total direct visitor spending in the destination generated by the DMO visitor guide**
- **Alternatively, spending that the visitor guide marketing program can take credit for**

# RETURN ON INVESTMENT MODEL

The surveys used in this research collected information critical to calculating economic impact, such as actual visitation to the destination after ordering the visitor guide, whether those that did visit the destination had already made up their mind to visit the destination—and how long they would stay—when requesting the DMO’s visitor guide, as well as detailed information on their trip purpose and in-market spending behavior. Such data allowed for the differentiation between leisure and business/conference visitors and others and measure in-market spending by visitors influenced by the DMO visitor guide to visit or extend their stay in the destination.

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

- **Visitors on incremental trips** had not fully made up their mind to visit the destination when they ordered the DMO visitor guide and stated that the visitor guide influenced their decision to ultimately visit the destination. To be considered an incremental visitor, respondents who had not made up their mind to visit prior to ordering the DMO visitor guide must then state in a subsequent survey response that the visitors guide helped them make their decision to visit and that the guide was “Important” or “Very important” to their decision to visit.
- **Visitors who extended their stay in the destination** can be leisure travelers, business travelers or convention/group meeting attendees. Leisure travelers who did not state that the DMO visitor guide influenced their decision to visit the destination and all business and convention travelers were asked a series of questions on the influence of the DMO visitor guide on their length of their stay in the destination. Economic impact estimates for this group only include spending during reported “additional” days in-market generated by the DMO visitor guide.

A visual representation of the ROI model is presented on the following page.


# RETURN ON INVESTMENT MODEL



# KEY ECONOMIC IMPACT FINDINGS

- **Incremental trips generated by the 12 DMO visitor guides in this study:** For the 145,013 persons receiving these visitor guides through direct order, an estimated 3,668 incremental trips were generated for the respective destinations. The average incremental trip lasted 4.6 days, with a reported in-market spending of \$314.11 per day. In total, the incremental trips generated by these DMO visitor guides resulted in approximately \$5,377,707 in new visitor spending in these destinations.
- **Incremental spending on trips extended as a result of the 12 DMO visitor guides in this study:** DMO visitor guides can also encourage longer stays in a destination and thus increase the visitor spending the destination realizes. It is estimated that an additional 4,776 incremental trips days were generated by these visitor guides from visitors who lengthened their initial intended stay in the destinations. In total, the incremental trip days generated by these guides resulted in approximately \$1,539,007 in new visitor spending in these destinations.
- **Total Estimated Economic Impact:** The two components described 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 as a result of the direct order distribution of the 12 DMO visitor guides in this study, \$6,916,713 in direct visitor spending was generated for these destinations. Alternatively, given the 145,013 visitor guides distributed during the period of study between January 2020 – July 2021, the ROI per visitor guide distributed is estimated to be \$48 : 1.





Incremental Trips  
Generated in 2020-2021 by the  
DMO Visitor Guides Studied

3,668




Extended Trip Days  
Generated in 2020-2021  
by the DMO Visitor Guides Studied

4,776



Economic Impact—Total Direct  
Visitor Spending Generated in 2020-2021  
by the DMO Visitor Guides Studied

**\$6,916,713**



# Overall ROI per Visitor Guide Distributed

**\$48 : 1**



# SUMMARY OF ECONOMIC IMPACT ESTIMATES

<b>Total Visitor Guides Distributed (January 2020 – July 2021)</b>	<b>145,013</b>
Incremental trips generated by the DMO visitor guides studied	3,668
Extended trip days generated by the DMO visitor guides studied	4,776
Total <b>direct visitor spending</b> generated by the DMO visitor guides studied	<b>\$6,916,713</b>
ROI per guide distributed	<b>\$48 : 1</b>

# COMPARATIVE FINDINGS BY DMO

Destination	Incremental trips	Average length of stay	Average reported spending per day	Economic impact of incremental trips	Total number of incremental visitor days	Economic impact of trips lengthened	Total Economic Impact	ROI per Visitor Guide Distributed
<b>Average</b>	<b>28</b>	<b>4.6</b>	<b>\$342.23</b>	<b>\$39,466</b>	<b>27</b>	<b>\$8,997</b>	<b>\$48,464</b>	<b>\$48.46</b>
Destination A	8	5.4	\$388.73	\$17,924	15	\$5,912	\$23,836	\$23.84
Destination B	26	4.1	\$340.48	\$36,321	56	\$19,128	\$55,449	\$55.45
Destination C	32	4.9	\$336.95	\$52,455	43	\$14,621	\$67,076	\$67.08
Destination D	32	4.2	\$286.03	\$37,554	24	\$6,963	\$44,517	\$44.52
Destination E	29	4.1	\$410.42	\$48,799	27	\$10,965	\$59,765	\$59.76
Destination F	20	3.6	\$347.16	\$24,410	13	\$4,637	\$29,047	\$29.05
Destination G	17	8.8	\$288.12	\$41,929	34	\$9,667	\$51,596	\$51.60
Destination H	74	3.7	\$320.92	\$87,985	26	\$8,403	\$96,388	\$96.39
Destination I	10	5.2	\$289.40	\$14,814	15	\$4,273	\$19,088	\$19.09
Destination J	19	3.5	\$561.30	\$36,836	15	\$8,186	\$45,021	\$45.02
Destination K	38	3.2	\$259.55	\$31,451	18	\$4,551	\$36,003	\$36.00
Destination L	37	4.2	\$277.66	\$43,119	38	\$10,661	\$53,780	\$53.78

A group of five diverse people (three men and two women) are sitting together on the floor against a white brick wall. They are all smiling and looking towards the camera. The man on the far left has long blonde hair and glasses, wearing a light-colored jacket. The man next to him has a beard, glasses, and a yellow t-shirt. The woman in the middle has long dark hair and is wearing a grey top. The man next to her has a beard, glasses, and a red and white checkered shirt. The woman on the far right has dark curly hair and is wearing a green sleeveless top. The woman on the far right has blonde hair and is wearing a dark patterned top. A vertical teal line is positioned to the left of the text.

# DMO VISITOR GUIDE USERS: DEMOGRAPHIC PROFILE



# DEMOGRAPHIC PROFILE



## Gender

Female: 51.5%

Male: 45.7%

Other: 0.1%



## Generation

Millennials or Younger: 6.4%

Gen X: 18.5%

Baby Boomer or Older: 75.1%



## Marital Status

Married/partnered: 74.1%

Single: 19.1%

Children under 18: 10.9%



## Ethnicity

Caucasian: 80.6%

Latino/Hispanic: 4.1%

Asian/Pacific Islander: 2.3%


Black/African-American: 0.8%

**COMBINED HOUSEHOLD INCOME = \$103,171**



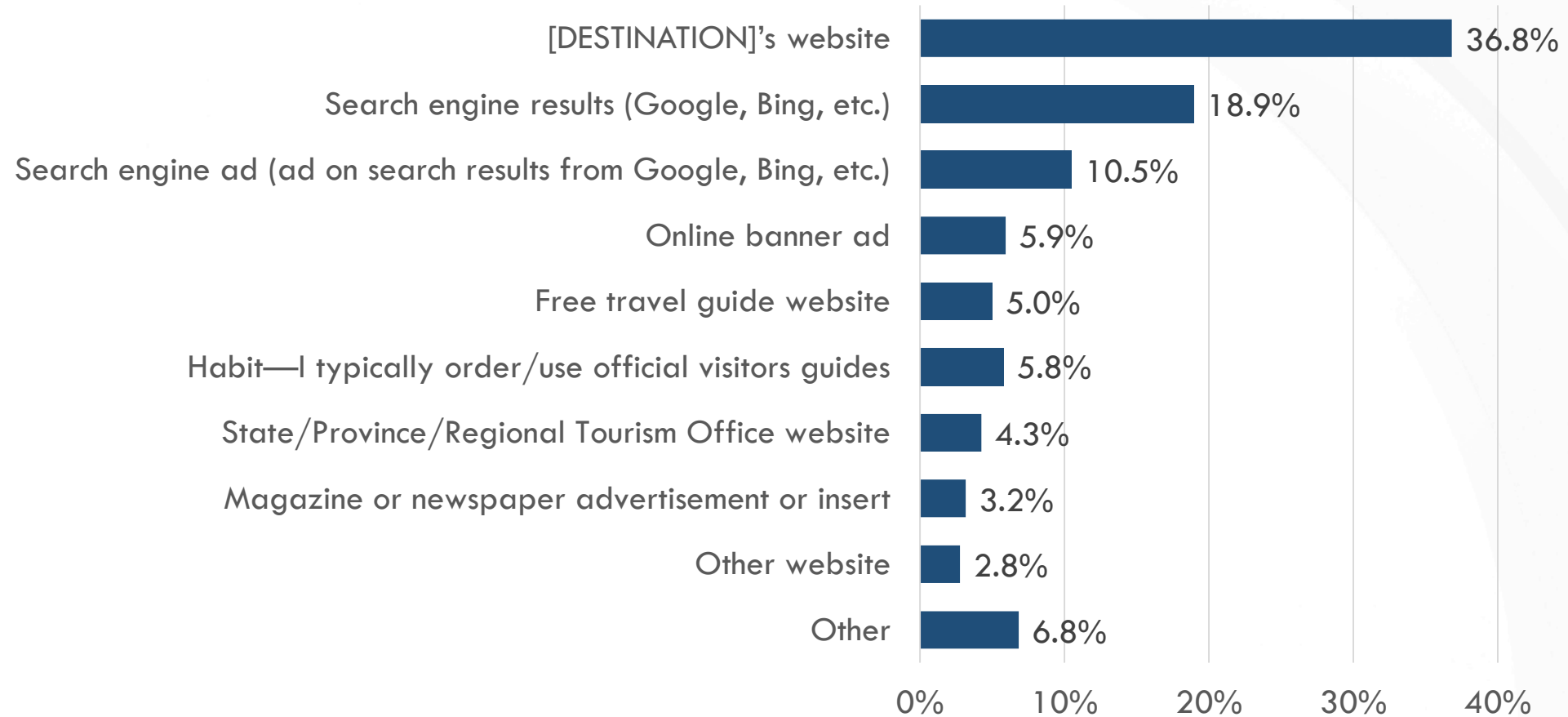
Base: All Respondents, 5,691 completed responses.





**MOTIVATION FOR ORDERING  
& USAGE OF OFFICIAL DMO  
VISITOR GUIDES**

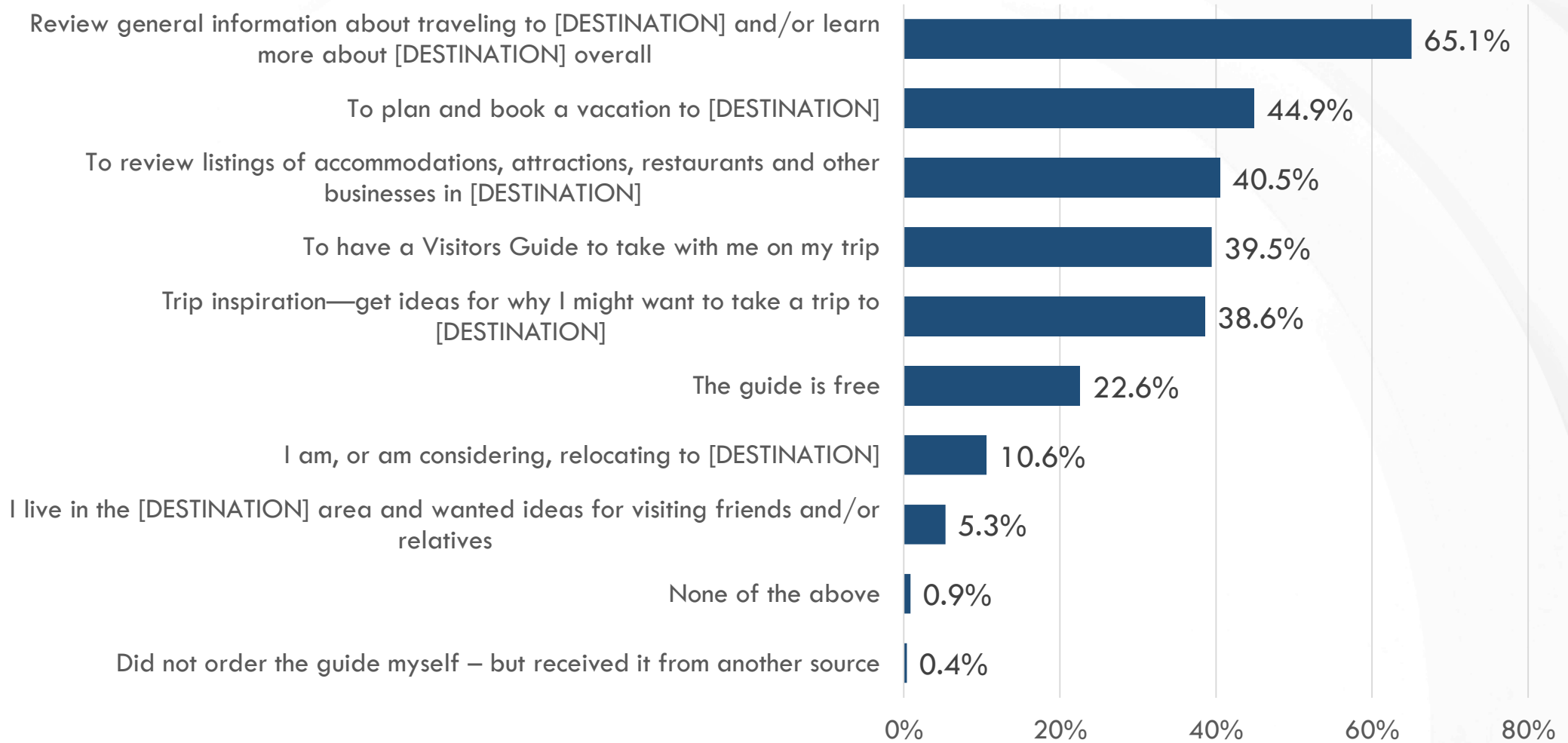
# HOW REQUESTORS LEARN ABOUT OFFICIAL VISITOR GUIDES



How did you initially learn about our Official Visitors Guide? (Select one)

Base: All Respondents, 5,691 completed surveys.

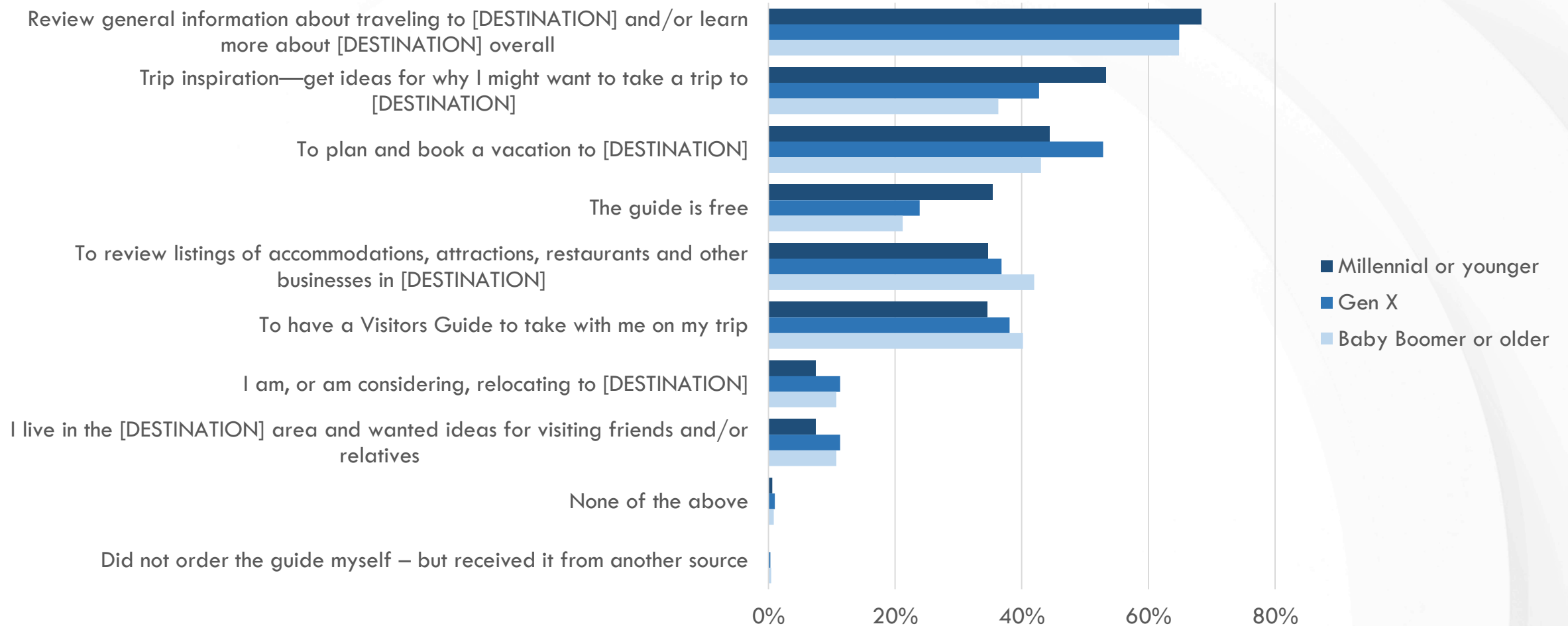
# REASONS FOR ORDERING OFFICIAL VISITOR GUIDES



Which of the following describes your reason(s) for ordering the [DESTINATION] Official Visitors Guide? (Select all that apply)

Base: All Respondents, 5,691 completed surveys.

# REASONS FOR ORDERING OFFICIAL VISITOR GUIDES—BY GENERATION



Which of the following describes your reason(s) for ordering the [DESTINATION] Official Visitors Guide? (Select all that apply)

Base: All Respondents, 5,691 completed surveys.

# READ OFFICIAL VISITOR GUIDE OR ACCESSED ONLINE

## Read Visitors Guide



## Accessed Visitor Guide Online



Did you read the printed or digital [DESTINATION] 2020 Official Visitors Guide? Base: Respondents who received a printed copy of the Visitors Guide or accessed the guide online, 5,276 completed surveys.

Do you recall accessing [DESTINATION]'s 2020 Official Visitors Guide online? Base: All Respondents, 5,691 completed surveys.

# USERS OF BOTH DIGITAL AND PRINT VISITOR GUIDES vs. USERS OF ONLY PRINT

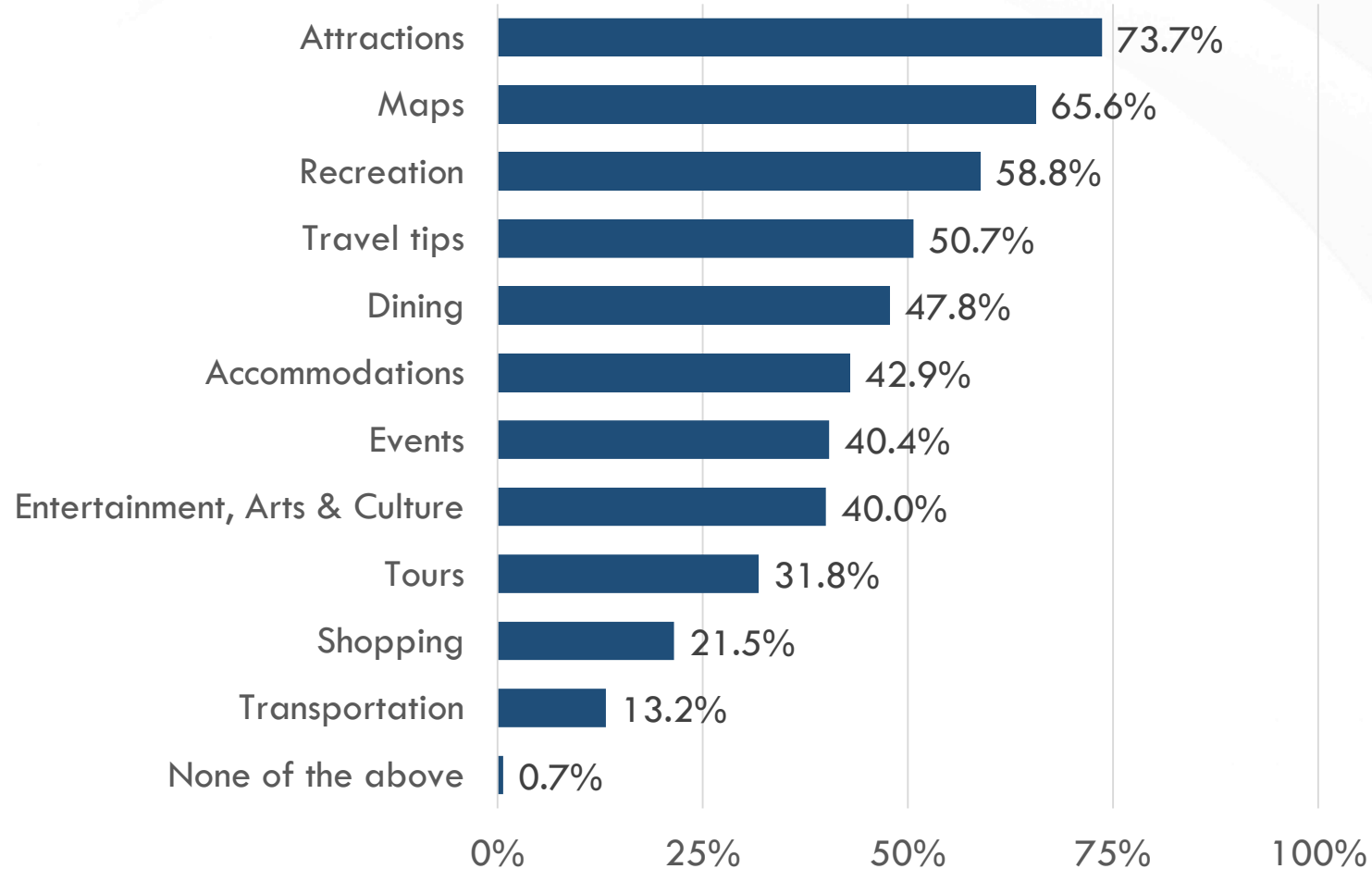
- **Ordered the guide to plan and book a vacation (48.0% vs. 38.7%)**
- **Likelier to specifically seek travel tips in the guide (53.2% vs. 45.6%)**
- **Less likely to be at a point of potential conversion when they read the visitor guide (21.6% vs. 29.0%)**



A person is shown from the chest up, wearing a teal shirt, holding and reading a large, thick book. The book is open, and the pages are visible. The image is overlaid with a semi-transparent teal filter. A vertical teal line is positioned to the left of the text. The text is in a bold, white, sans-serif font, centered horizontally and vertically.

**ENGAGING WITH  
VISITOR GUIDE CONTENT**

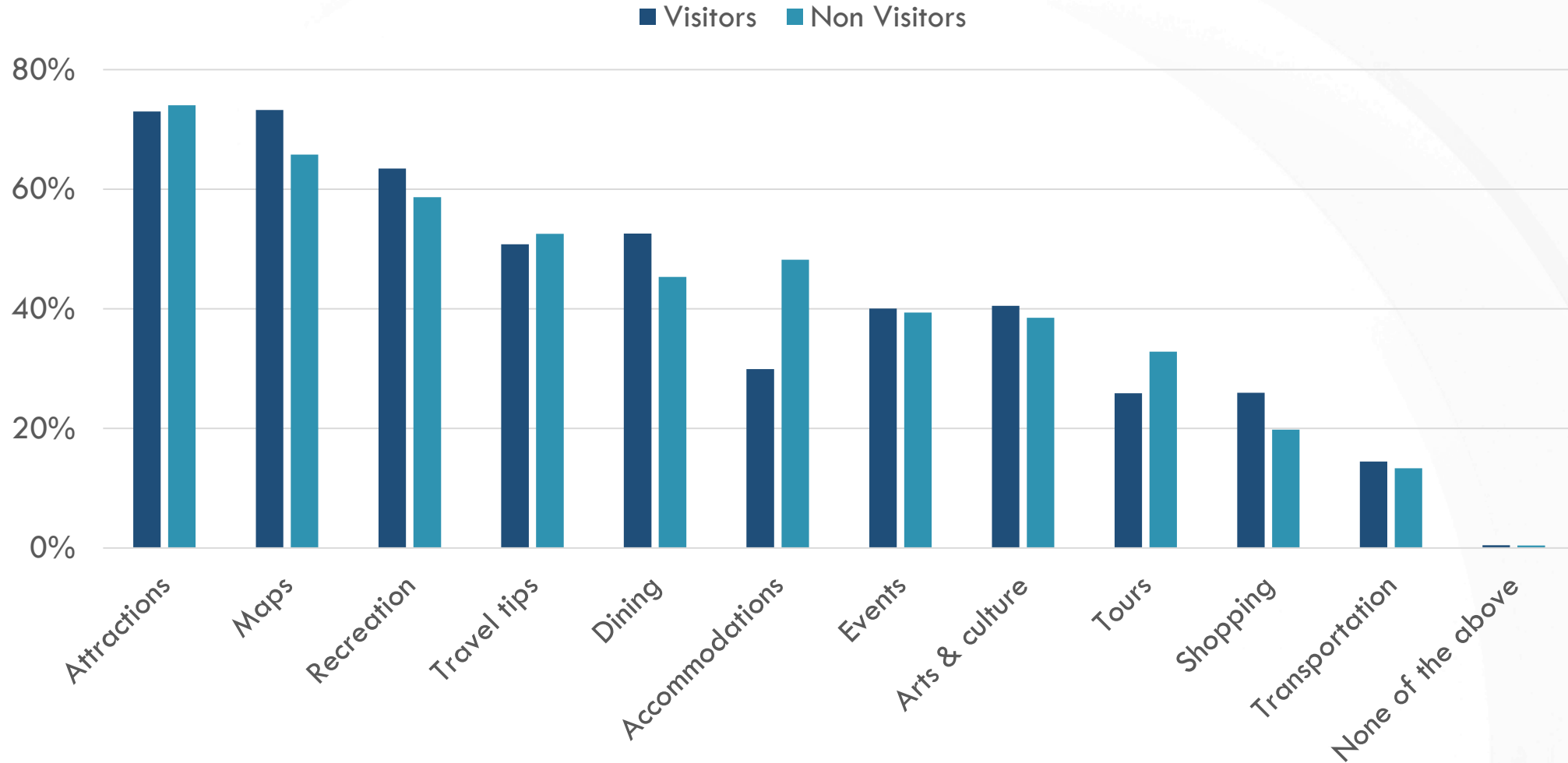
# VISITOR GUIDE CONTENT SOUGHT



Which types of information were you specifically seeking when you ordered the [DESTINATION] Official Visitors Guide? (Select all that apply)

Base: All Respondents, 5,691 completed surveys.

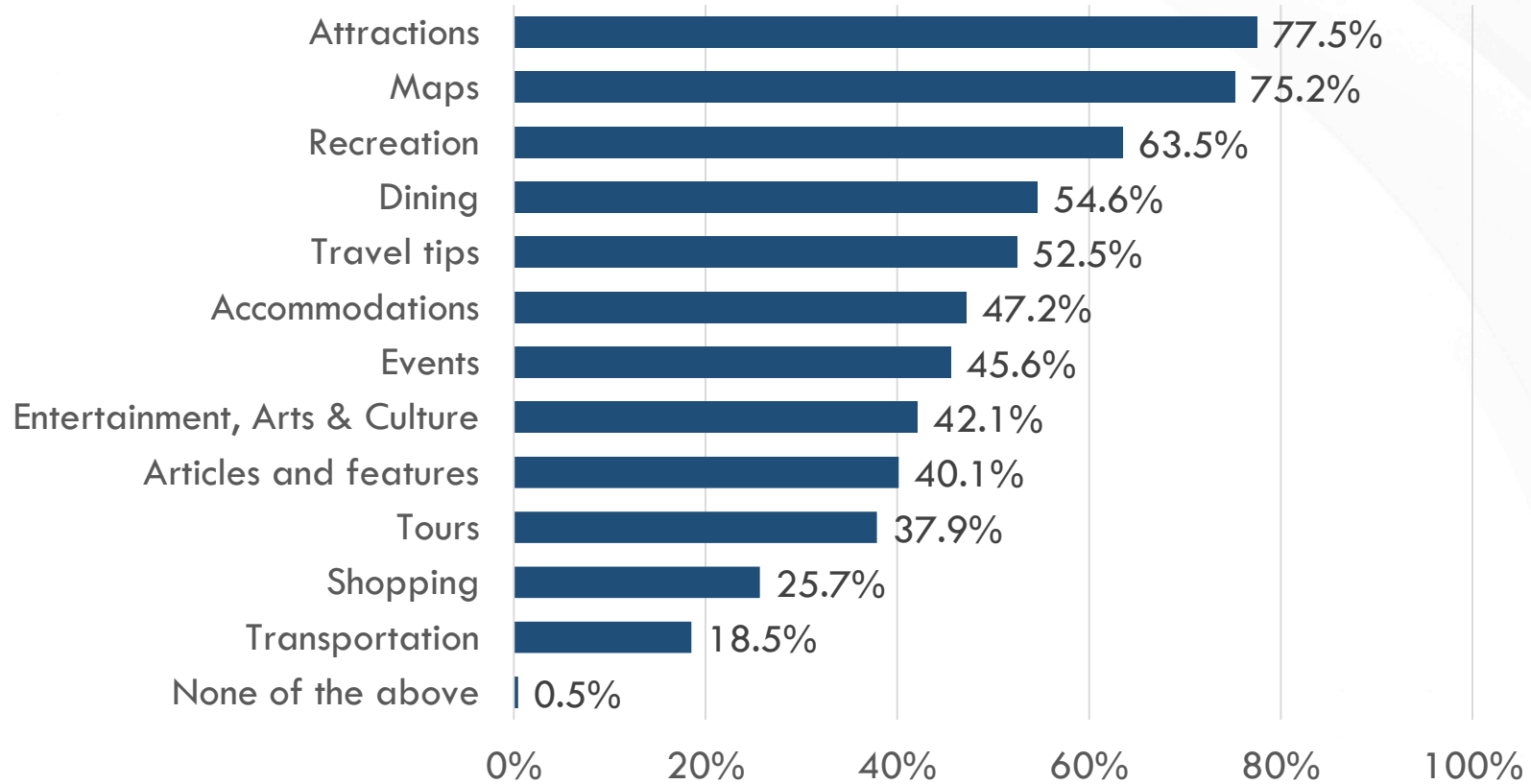
# VISITOR GUIDE CONTENT SOUGHT—VISITORS AND NON-VISITORS



Which types of information were you specifically seeking when you ordered the [DESTINATION] Official Visitors Guide? (Select all that apply)

Base: All Respondents, 5,691 completed surveys.

# VISITOR GUIDE CONTENT REVIEWED



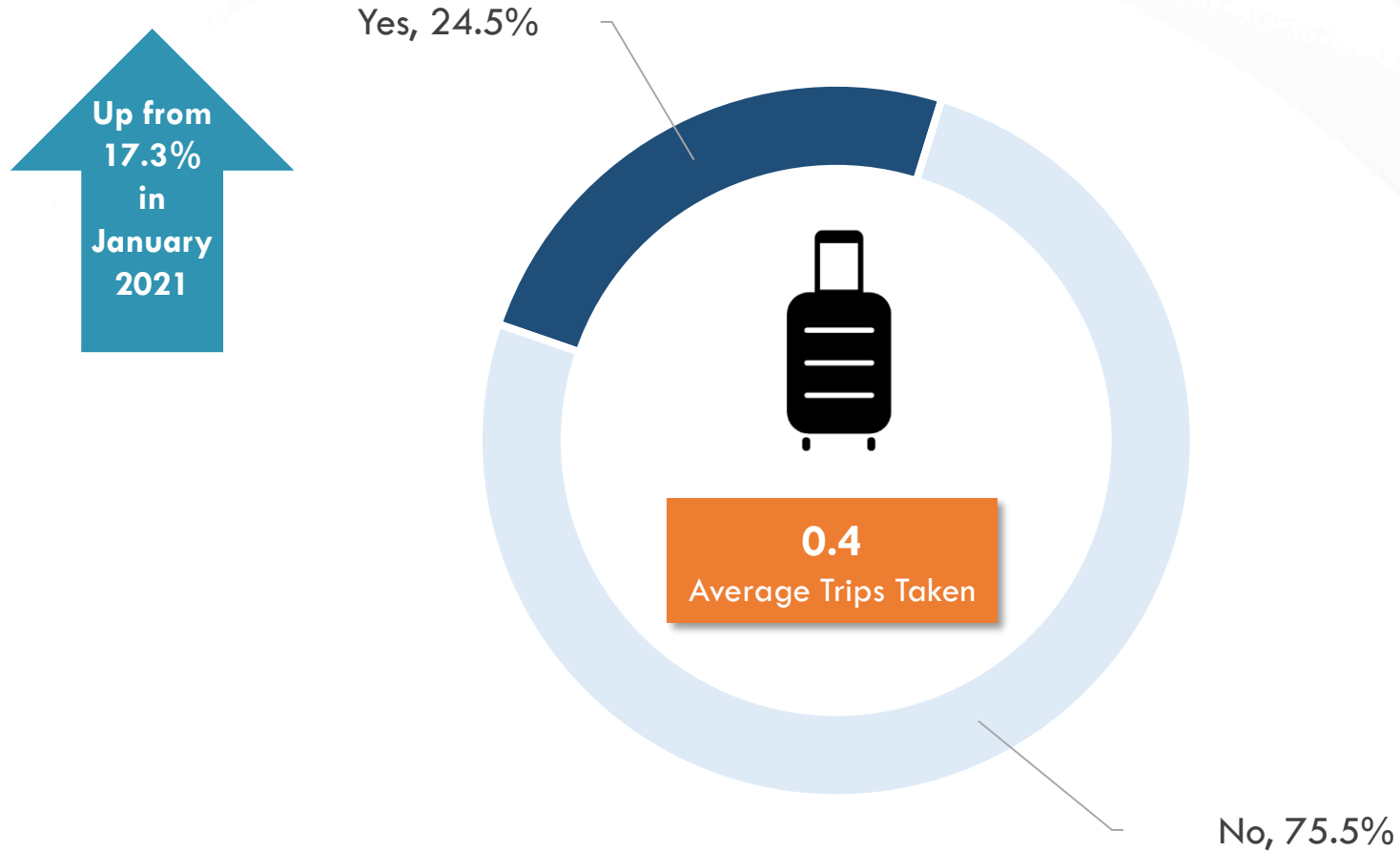
Which types of content and other information contained in the [DESTINATION] Official Visitors Guide did you read or review?

Base: Respondents who read the Visitors Guide, 4,721 completed surveys.

A woman with long, wavy hair is seen from behind, looking out over a vast valley. The background features rolling green hills and mountains under a bright sky. The image is overlaid with a semi-transparent dark grey filter. A vertical teal line is positioned to the left of the text.

# THE IMPACT OF DMO VISITOR GUIDES ON VISITATION

# VISITED THE DESTINATION AFTER RECEIVING THE VISITOR GUIDE

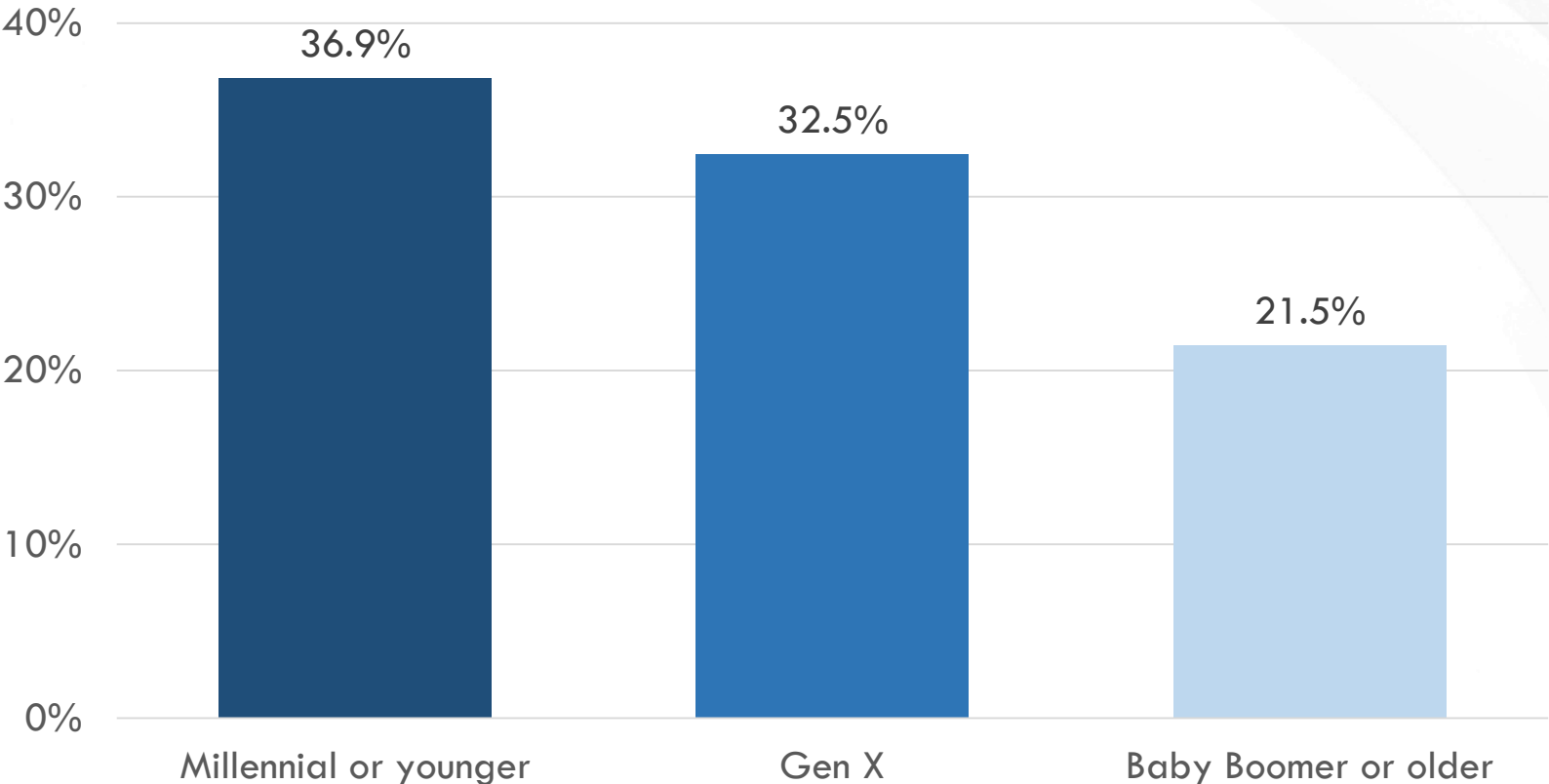


Since receiving your [DESTINATION] Official Visitors Guide, how many trips to [DESTINATION] have you made?

Base: Potential visitors who read the Visitors Guide, 4,533 completed surveys.

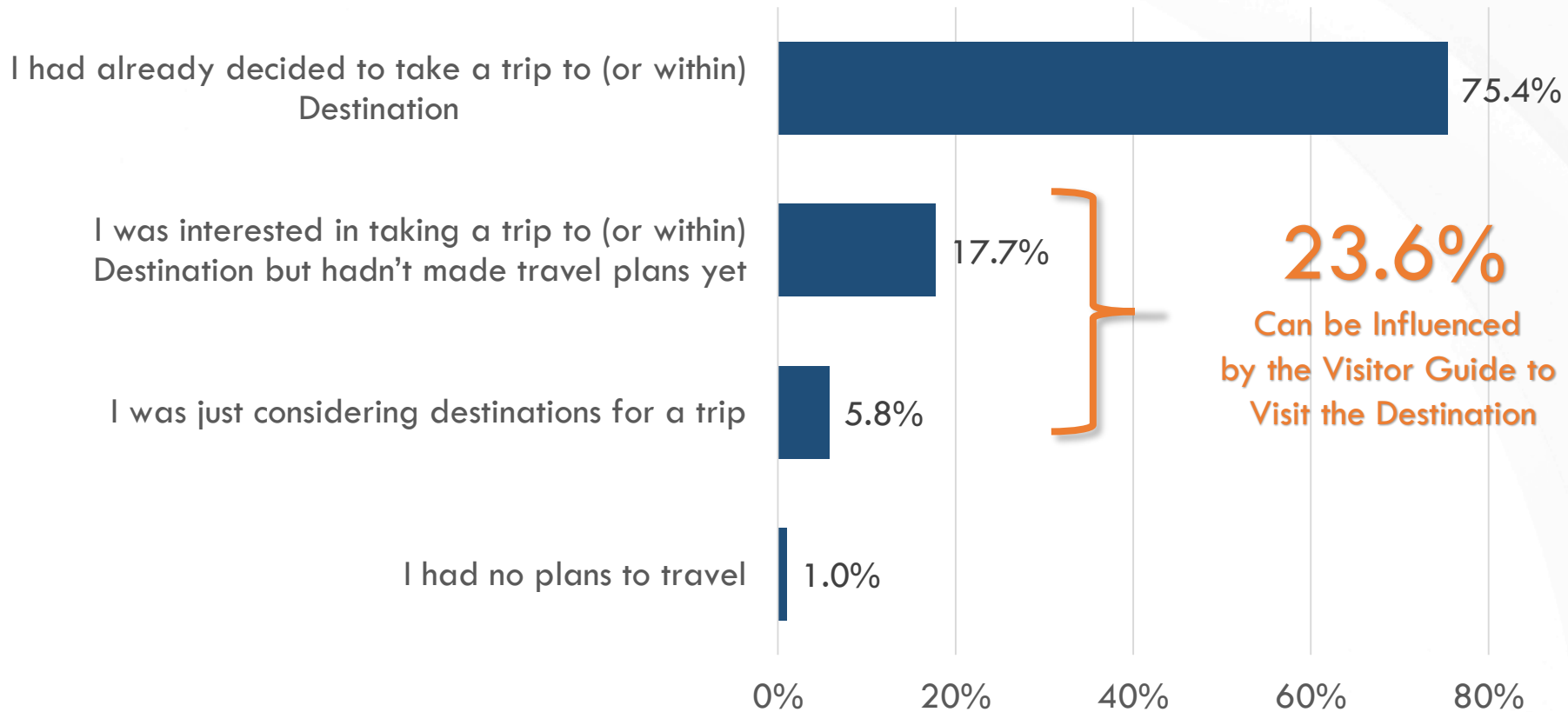


# VISITED THE DESTINATION AFTER RECEIVING THE VISITOR GUIDE—BY GENERATION



Since receiving your [DESTINATION] Official Visitors Guide, how many trips to [DESTINATION] have you made?  
Base: Potential visitors who read the Visitors Guide, 4,533 completed surveys.

# VISITORS: POINT IN DESTINATION DECISION



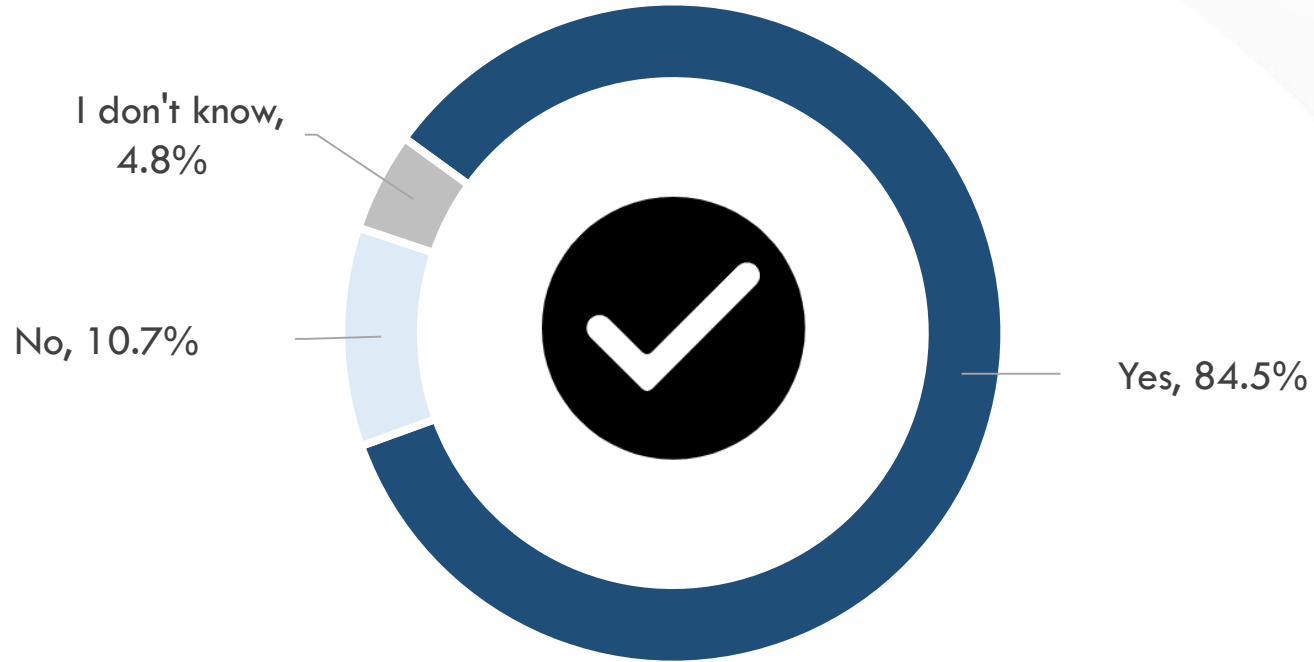
Which best describes where you were in the trip planning process when you received the [DESTINATION] Official Visitors Guide?

Please select the one option that best describes where you were in your travel decision.

Base: Respondents who visited the destination since reading the Visitors Guide, 932 completed surveys.

# VISITORS: INFLUENCE OF VISITOR GUIDE ON DESTINATION DECISION

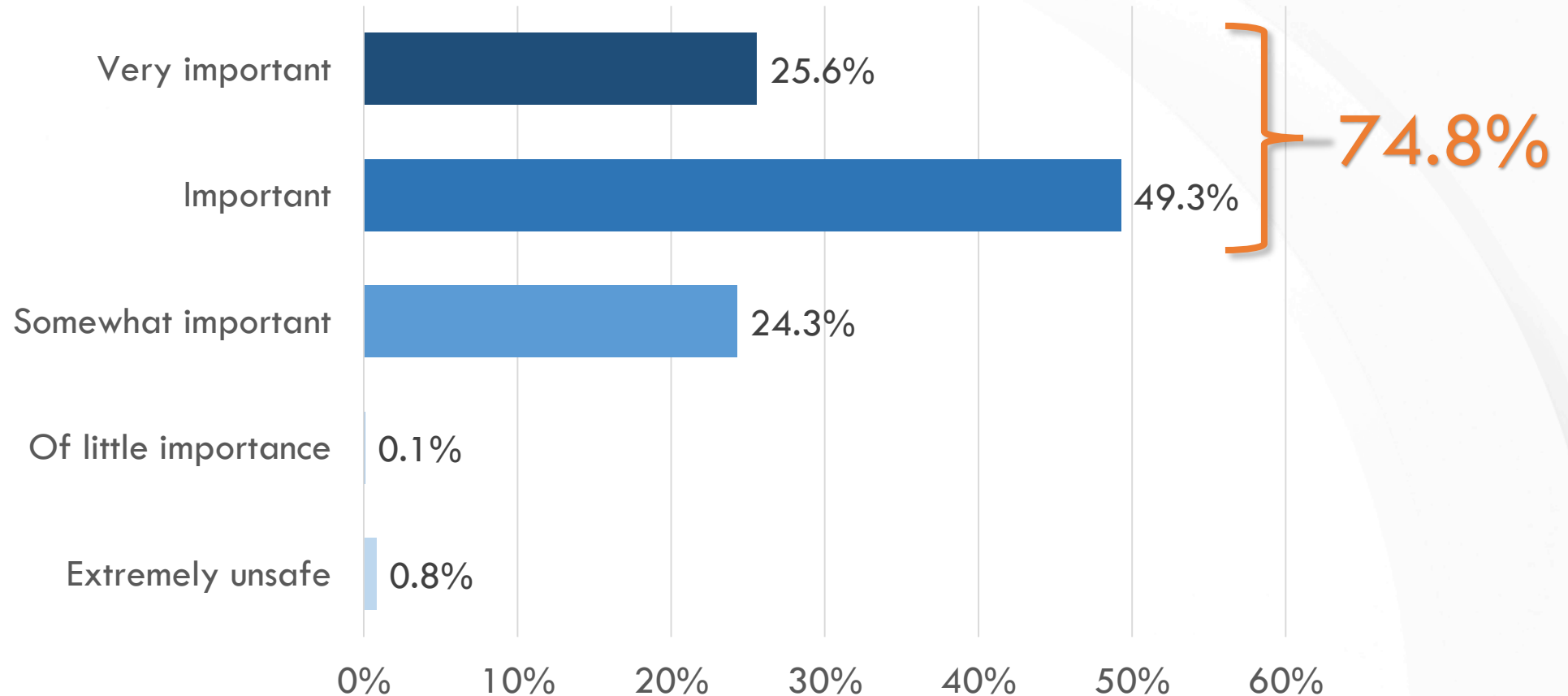
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Do you feel that the [DESTINATION] Official Visitors Guide helped you make your decision to visit Destination?

Base: Visitors who had not yet made the decision to visit the destination when they received the Visitors Guide, 237 completed surveys.

# VISITORS: IMPORTANCE OF VISITOR GUIDE TO DESTINATION DECISION

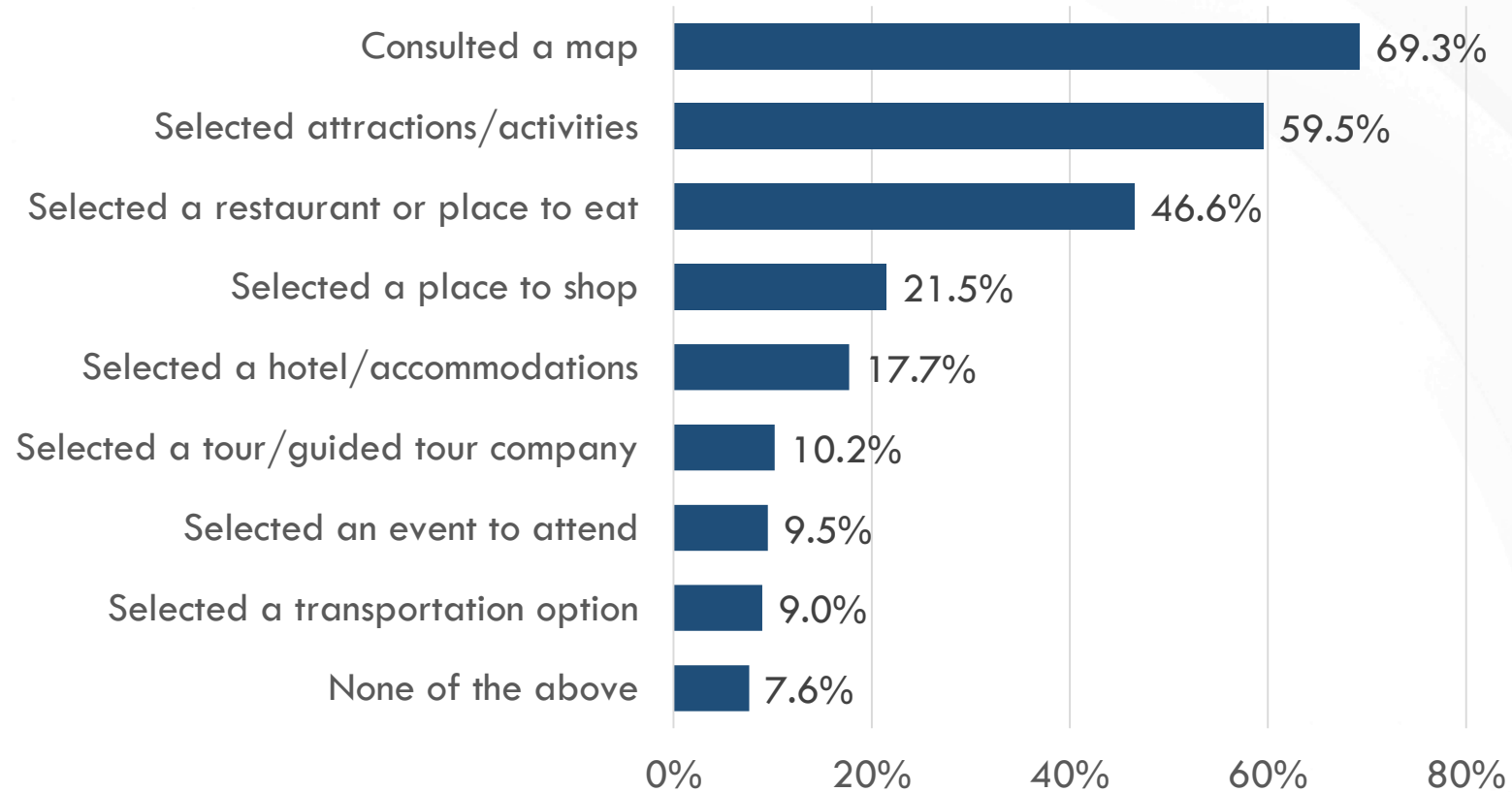


How important was the [DESTINATION] 2020 Official Visitors Guide to you in making the decision to visit [DESTINATION]? (Select one)

Base: Respondents who reported the Visitors Guide influenced their decision to visit, 207 completed surveys.



# VISITORS: TRAVEL PLANNING TASKS COMPLETED USING DMO VISITOR GUIDE



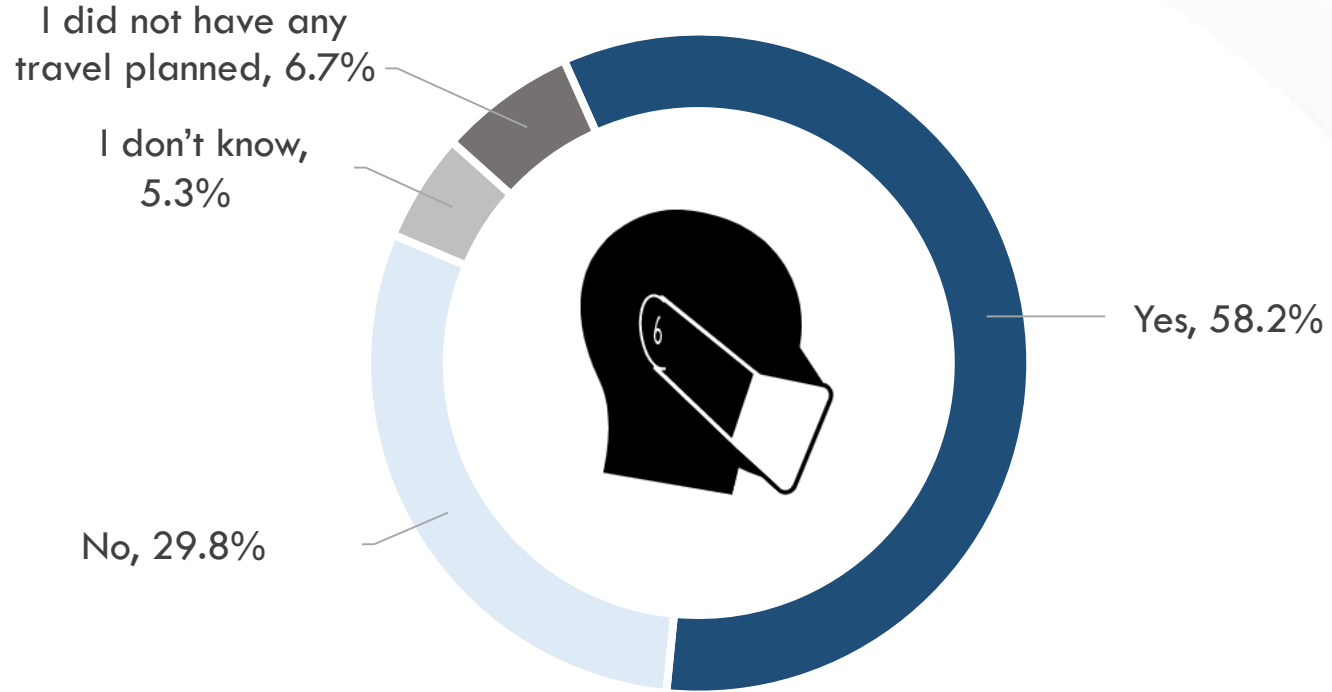
Which of these travel planning decisions or tasks did you make or complete based on information from the [DESTINATION] Official Visitors Guide? (Select all that apply)

Base: Respondents who visited the destination since reading the Visitors Guide, 932 completed surveys.

A top-down view of an open suitcase. Inside, a grey toy airplane is positioned diagonally. Below it, several blue surgical masks are stacked. The suitcase has a black handle and is set against a yellow background. The right side of the image is a dark teal gradient with white text.

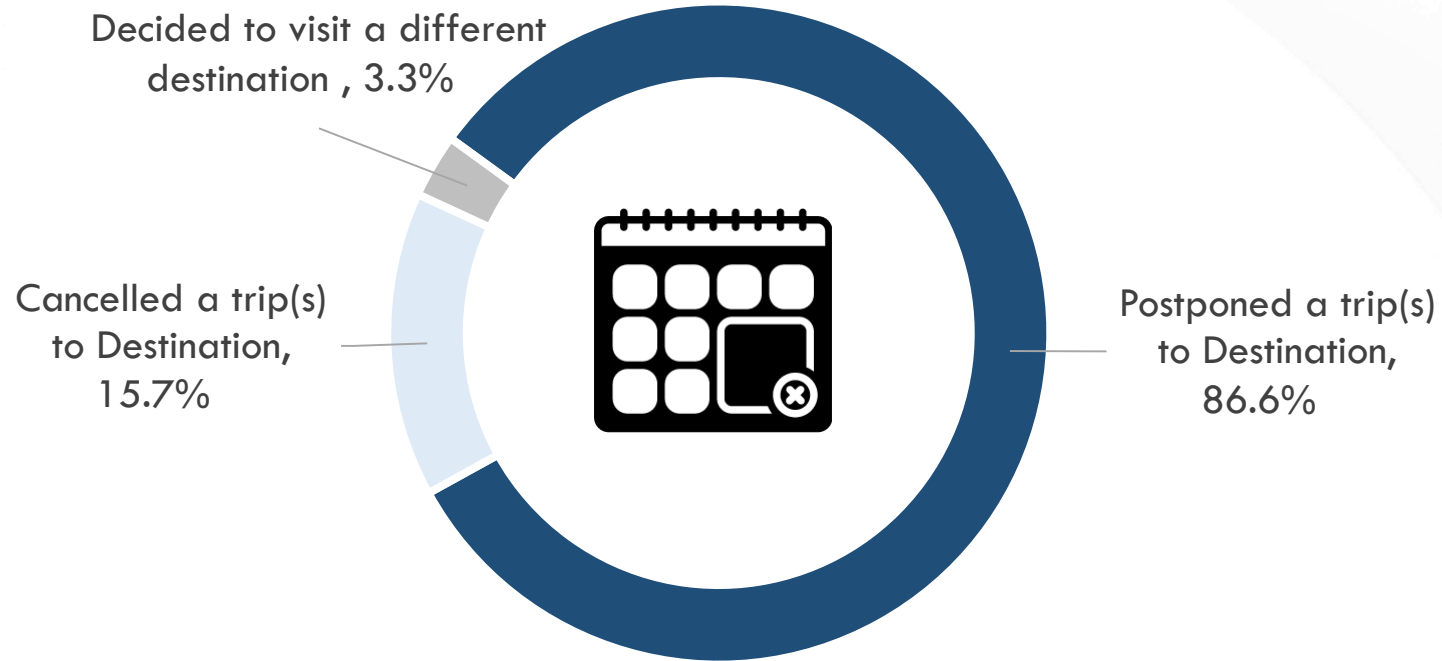
# NON-VISITORS & THE IMPACT OF THE COVID-19 PANDEMIC

# TRAVEL PLANS AFFECTED BY THE CORONAVIRUS SITUATION



Has the current coronavirus situation affected your travel plans to [DESTINATION] in any way?  
Base: Respondents who have not visited the destination since reading the Visitors Guide, 3,599 completed surveys.

# HOW THE CORONAVIRUS SITUATION AFFECTED TRAVEL PLANS



How has the coronavirus situation affected your travel plans to [DESTINATION]? (Select all that apply) Due to the coronavirus situation, I have \_\_\_\_\_.

Base: Respondents whose travel plans were affected by the current coronavirus situation, 1,991 completed surveys.



# EXCITEMENT TO TAKE A TRIP TO THE DESTINATION AFTER THE PANDEMIC

**8.9**

**Average score on an  
11-point scale**



How excited are you about taking a trip to [DESTINATION] after the coronavirus situation is resolved?

Please use the scale below from “0 – Not at all excited” to “10 – Extremely excited.”

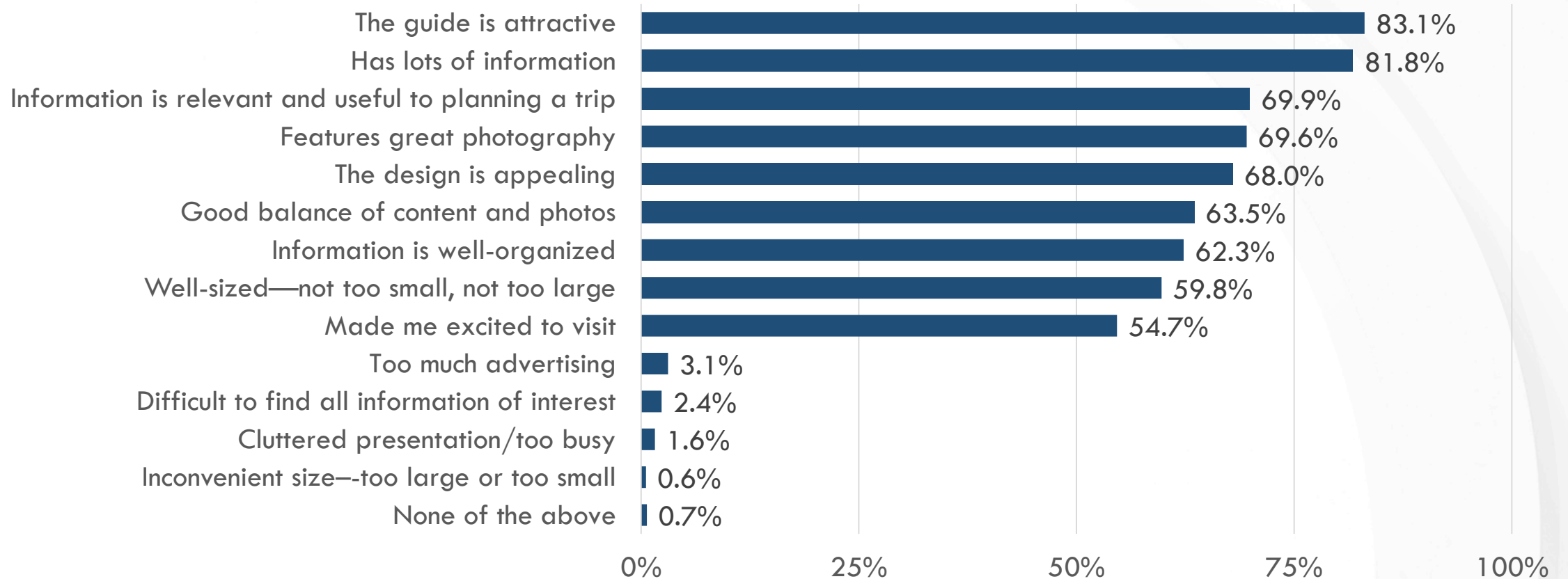
Base: Respondents who have not visited the destination since reading the Visitors Guide, 3,599 completed responses.



OPINIONS ABOUT OFFICIAL  
DMO VISITOR GUIDES

# DESCRIPTIONS OF OFFICIAL VISITOR GUIDES—TOP 2 BOX SCORE

**Top 2 Box Score—% who “Agree” or “Strongly agree”  
with each statement**

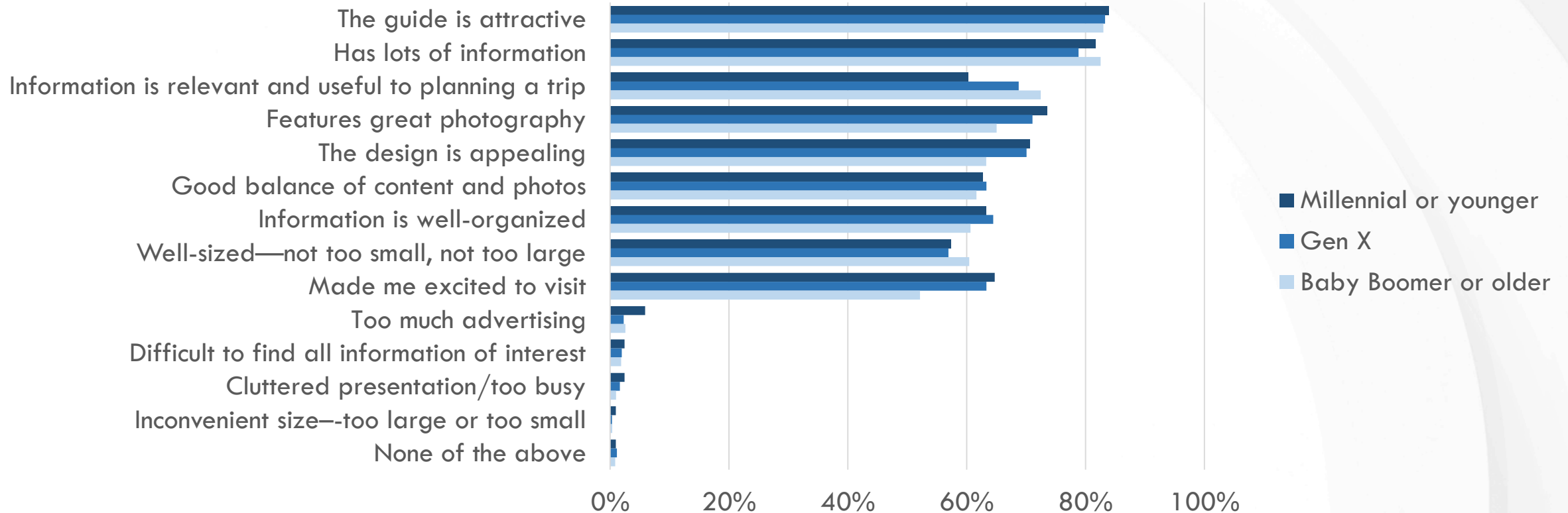


Which of the following statements do you agree or strongly agree with to describe the Official Visitors Guide?  
(Select all that apply)

Base: Respondents who read the Visitors Guide, 4,721 completed surveys.

# DESCRIPTIONS OF OFFICIAL VISITOR GUIDES—BY GENERATION

**Top 2 Box Score—% who “Agree” or “Strongly agree”  
with each statement**



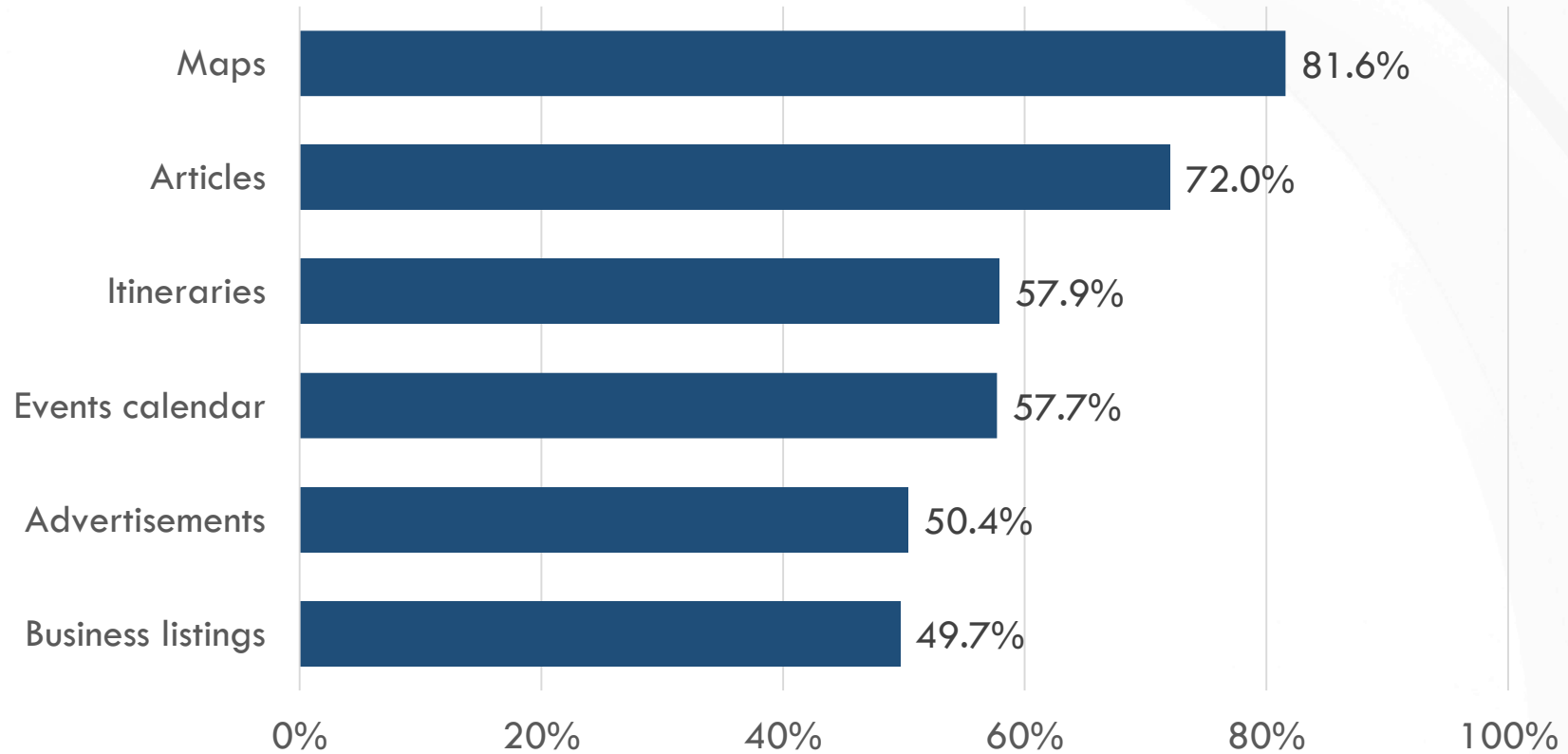
Which of the following statements do you agree or strongly agree with to describe the Official Visitors Guide? (Select all that apply)

Base: Respondents who read the Visitors Guide, 4,721 completed surveys.



# VISITORS: HELPFUL GUIDE CONTENT—TOP 2 BOX SCORE

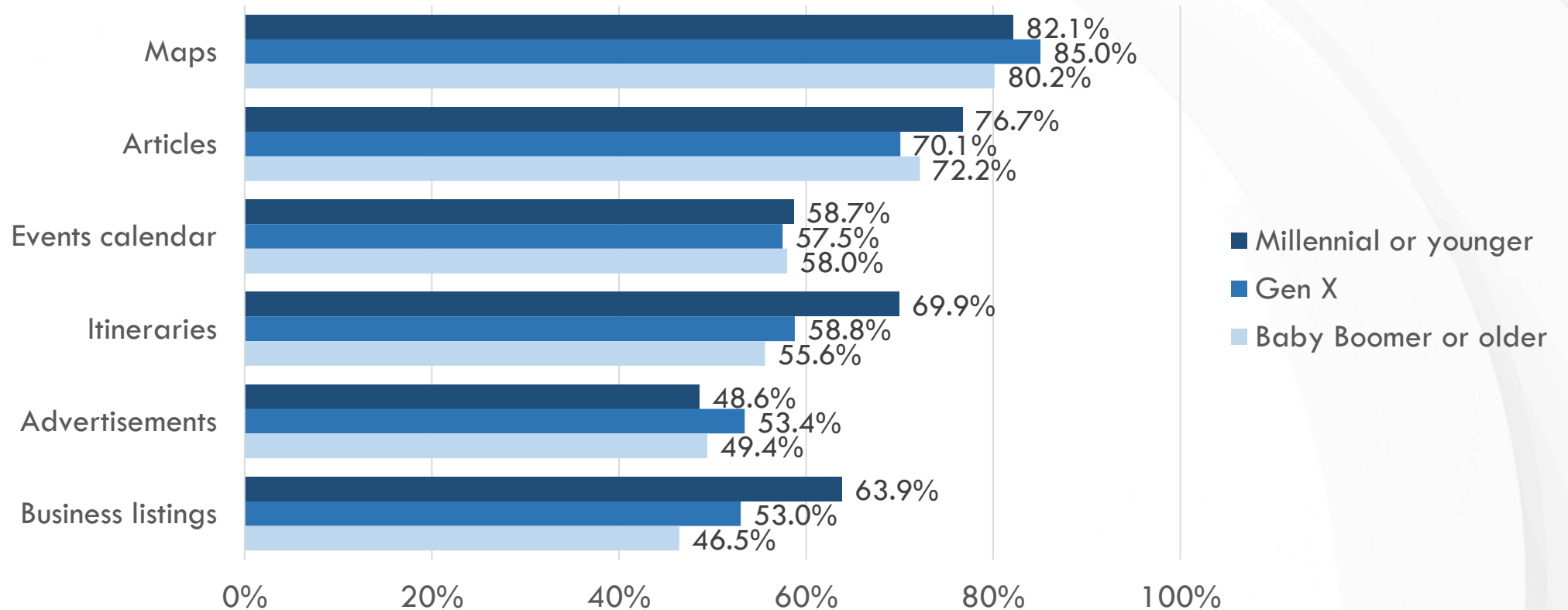
Top 2 Box Score—% Rating Each as “Helpful” or “Very helpful”



How helpful were each of the following types of Official Visitors Guide content to planning your trip? Please use the scale from “Very unhelpful” to “Very helpful” below. Base: Respondents who visited the destination since reading the Visitors Guide, 932 completed surveys.

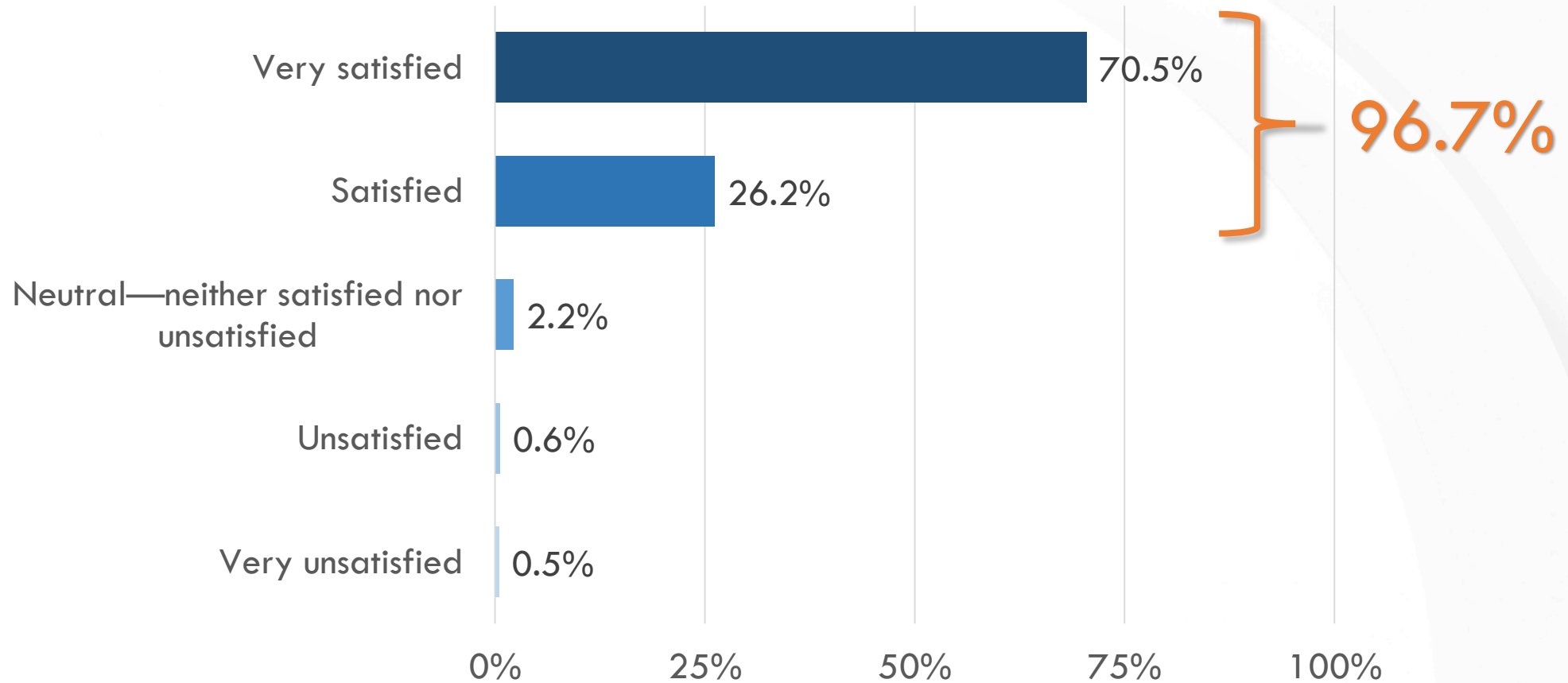
# VISITORS: HELPFUL GUIDE CONTENT—BY GENERATION

Top 2 Box Score—% Rating Each as “Helpful” or “Very helpful”



How helpful were each of the following types of Official Visitors Guide content to planning your trip? Please use the scale from “Very unhelpful” to “Very helpful” below. Base: Respondents who visited the destination since reading the Visitors Guide, 932 completed surveys.

# SATISFACTION WITH VISITOR GUIDE



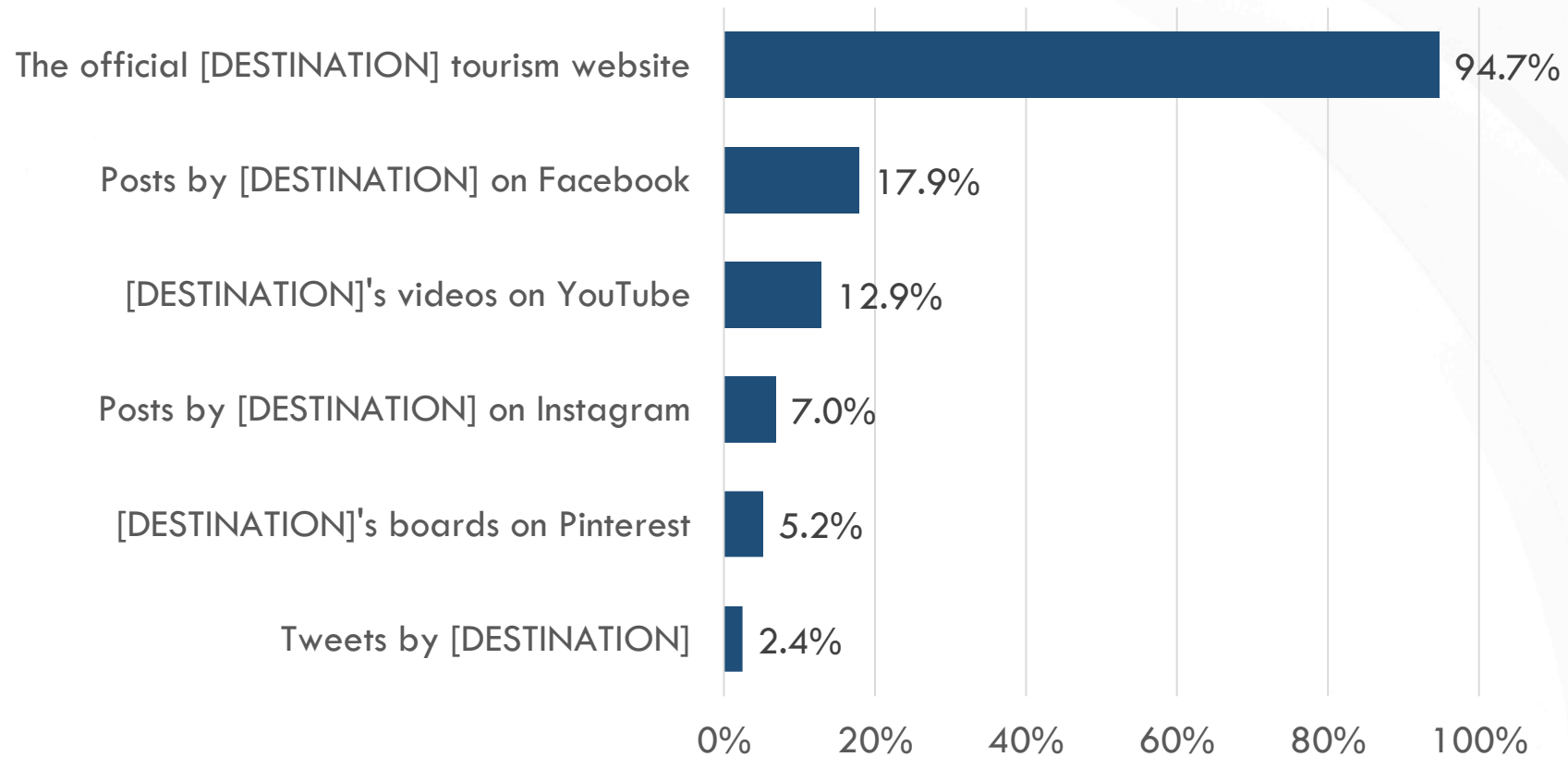
In general, how satisfied are you with the Destination Official Visitors Guide?

Base: Respondents who read the Visitors Guide, 4,721 completed surveys.



USE OF OTHER OFFICIAL  
DESTINATION RESOURCES

# OTHER OFFICIAL DESTINATION RESOURCES USED TO PLAN TRIP



Did you use any of these official [DESTINATION] resources while planning your trip? (Select all that apply)

Base: Respondents who visited the destination since reading the Visitors Guide, 789 completed surveys.



A collection of travel-related items including a wooden model airplane on a stand, a globe, a stack of books, a map, and a jar of travel items. The jar has a black label with the word "TRAVEL" written in white. The items are arranged on a dark blue textured surface.

# KEY TAKEAWAYS

TRAVEL



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**Official DMO visitor guides generate economic impact for their respective communities.** For the 12 DMO visitor guides studied, an estimated \$6.9 million dollars was generated in direct visitor spending. This results in an ROI of \$48 per visitor guide distributed.



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**Millennials order official DMO visitor guides earlier in their travel planning funnel compared to older generations.** Their motivations for ordering a guide were for trip inspiration and because it's free, while Gen X and Baby Boomers ordered the guide to review business listings.





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**Those who only review the printed visitor guide are more likely to be at a point of potential conversion compared to those who access both the print and digital versions of the guide (29.0% vs. 21.6%).**







# FOR MORE INFORMATION



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