

# Measuring Your Online Audience

## Why a Standard for DMO Web Sites Makes Sense

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### 1. Introduction: DMOs in a “Web Centric” World

In recent years, the Web has grown into a dominant marketing and communications medium for most Destination Marketing Organizations (DMOs). Both individually and collectively, DMOs have a significant reach online. Indeed, an estimated one third of all U.S. leisure travelers report having used at least one DMO Web site in the past year in their travel planning, a market of perhaps 50 million U.S. travelers (*State of the American Traveler Survey*, Destination Analysts 2006 – 2010\*). This online audience is several times larger than the readership of all DMO print publications combined, and highlights that DMOs, with the leverage of electronic media, are reaching far more travelers than ever before.

Therefore, the tracking of Web site activity and behavior is a critical part of reporting for most DMOs and an increasingly important measurement for stakeholders. DMOs use a wide range of web analytics tools and different technologies to collect these metrics. There is also a bewildering range of terms (e.g., "visits," "unique visits," "visitors," "user sessions"). These factors make reporting complex and confusing to communicate to stakeholders, industry partners and advertisers.

This information holds the power to help define the impact and influence of DMOs' online marketing and promotional efforts and to present this opportunity to potential advertisers. Yet DMO's online metrics are not consistent, comparable, independently validated or easy to understand. While this situation continues, every DMO, their partners, vendors and industry are weakened.



*An estimated one third of all U.S. leisure travelers have used a DMO Web site in their travel planning in the last 12 months. Source: “State of the American Traveler Survey,” Destination Analysts 2006-2010\**

## 2. The Benefits of a Standard in Audience Measurement

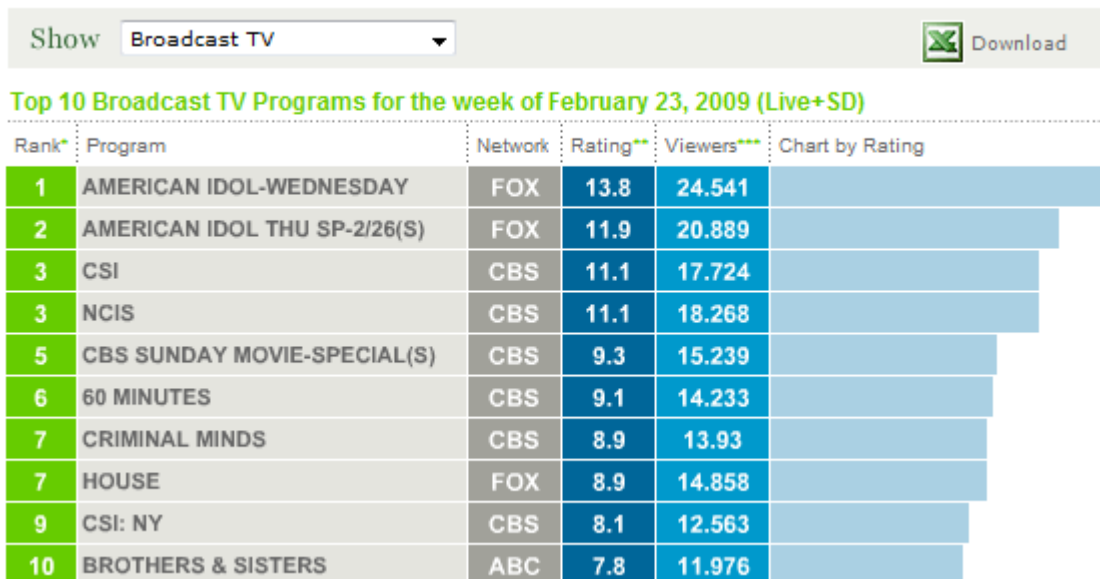
Many industries benefit from a standardized approach to measuring the reach and impact of their marketing including TV, radio, movies, airlines, grocery stores and more. So could DMOs.

Miles Media proposes adopting a standard for DMOs to track and report on their online audience which will offer a simple, validated and credible audience number (XXX “people” viewed your Web site). Having a consistent and standardized way to measure and compare results would benefit the entire DMO industry, increasing the credibility and value of reporting to DMO staff, funding agencies, the industry, stakeholders and more. Such a standard would not only provide an independent measurement of the audience, but also allow benchmarking with other DMOs, wider travel or media sites and any other comparable government or private sector organizations.

The whole solution would be simple to implement and could be very low or no cost for DMOs.

Such a standard would provide standard and consistent information for potential advertisers – a critical challenge for DMOs with print ad revenues in long term decline. It would also complement DMOs’ existing online reporting solutions, regardless of whether Google Analytics, Omniture, Core Metrics or other systems are

being used. It would add to and not replace any current reporting.



### Standardized Audience & Market Share Measurement Benefit Many Industries:

The television, radio and other media industries have long benefited from having an independent, standardized method for collecting and reporting on audience size and profile. Other industries, including consumer groceries, cooperate on collecting and sharing product sales, market share and other key market information.

Source: Nielsen TV Ratings: [www.NielsenMedia.com](http://www.NielsenMedia.com)

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## 3. Researching and Selecting a Standard

In 2008 and early 2009 Miles Media looked at a wide range of audience measurement tools available, including HitWise, comScore, Nielsen, Compete and Quantcast. After this review, we recommended in March 2009 that Quantcast be adopted as an interim audience measurement standard for DMOs. Since that time in May 2010, Quantcast became the first and so far only online audience measurement solution accredited by the Media Rating Council – the leading authority on media tracking standards and quality. This accreditation validated our earlier assessment and recommendation. Quantcast has also further established itself with many of the world’s largest online (and offline) media companies including Fox, Time Warner, Hulu & NBC Universal. It is completely free to use and simple to implement. See our fuller introduction and assessment below.



However, while we recommend the immediate adoption of Quantcast as an immediate solution, in parallel, we still recommend that DMOs work together to review the options in a transparent review process, determining if Quantcast or another solution is the best long term standard for DMOs. This review could be undertaken via a small taskforce of DMOs either via a research and/or investigation project and/or possible RFQ/RFP process. Vendors, including Miles Media and our competitors, could act as nonvoting contributors in this process. Both US Travel and DMAI could be also involved in this process and/or asked for their input.

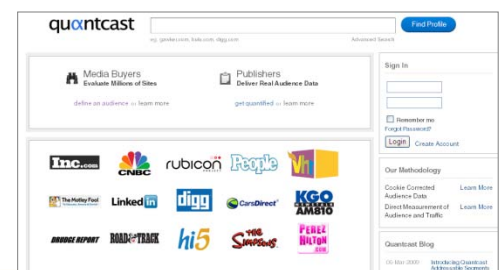


The specific solution is, of course, far less important than the importance of researching, endorsing and adopting an industry-wide audience measurement standard.

This review process could also establish industry-wide guidelines for audience measurement including ensuring that only travel-related DMO content is tracked, and not wider State- or city-related content (eg: on Economic Development web sites). Benchmarking services for participating DMOs could also be investigated, allowing DMOs to compare themselves against other DMOs based on the type and size of their visitor market, marketing budget and/or online marketing budget. Such enhanced research reporting (which is confidential to each individual DMO) is a common part of other industry-wide measurement solutions including TV, radio and the grocery industry.

## 4. Recommended “Acting” Standard - Quantcast Audience Measurement

Quantcast ([www.Quantcast.com](http://www.Quantcast.com)) is an online audience measurement company that combines the traditional methodology of a panel of users (in their case, 1.5 million Americans) with direct measurement of participating sites’ Web traffic. This dual tracking approach was pioneered by Quantcast but has now been mimicked by other audience measurement solutions. This methodology combines the merits of



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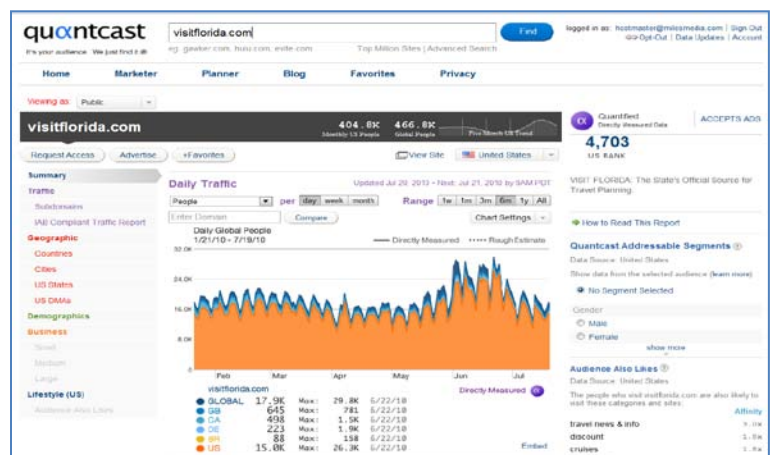
more than 50 years of panel-based audience measurement with the same direct measurement technology (JavaScript tags added to your site) as used by Google Analytics, Omniture, CoreMetrics and others.

Quantcast estimates the traffic of all Web sites based on its panel of users, but participating sites have far more accurate and complete reporting available by “directly measuring” or “quantifying” their sites, available by adding simple JavaScript tags to each page of your site.

Quantcast is used by many of the world’s largest online (and offline) media companies. NBC used Quantcast to report to their advertisers on their Web site’s audience (size and profile) during the 2008 and 2010 Summer & Winter Olympics. Hulu uses Quantcast to report on their overall site audience and the individual audience for every one of their online TV programs. Quantcast claims that, with such partners, more than 99.99% of all U.S. Internet users are tracked at some point in their Web site browsing every month.

Quantcast is targeting its revenue from advertisers and, in particular, agencies wishing to plan online media campaigns. Because of this, there is no cost for sites to be directly measured and tracked.

Quantcast integrates, validates and refines their panel and direct measurement data through a complex and powerful “inference model” which benefits from the reach and activity of their media partners. This inference model allows Quantcast to more accurately extrapolate its panel estimates for demographic profile information across your entire site traffic. This minimizes one of the traditional weaknesses of panel-only measurement solutions.



## Quantcast Reporting & Analysis

Quantcast offers audience measurement and a detailed demographic profile of your online users. It allows DMOs to report the estimated number of individuals, ie: “people” who viewed its Web site. All Web sites have their audience estimated, but for more accurate and complete reporting, DMO sites would need to be “directly measured,” a free added step of adding Quantcast’s tracking tags to your Web site.

With the agreement of its DMO partners, Miles Media is already directly measuring all its 50+ DMO clients' Web sites including major States (eg: Florida & Louisiana) and a wide range of CVBs (eg: Chicago and San Antonio). Since early 2009 a wide range of other North American DMOs have also become 'directly measured' by Quantcast including Tennessee, Pennsylvania, Denver CVB and more. As more DMOs start using Quantcast to 'directly measure' their online audience both the quality of their reporting and the shared value of accurate audience comparisons across the industry becomes even more useful.

## 5. Next Steps

This analysis and commentary is designed to stimulate debate and follow up from DMOs. We would welcome your comments, questions and feedback. Please share and forward this White Paper to your colleagues. We will be following up with DMO groups such as "Travel 2.0" plus the TIA and DMAI.

We believe a standardized approach to audience measurement is a simple and achievable goal for our sector. It would have significant benefits over the long run for the entire industry, with more credible, comparable and robust reporting on the size and reach of DMOs' audience.

We recommend the following steps:

1. Discuss this issue internally and share this document with your colleagues and associates. We would welcome other analysis and commentary proposals that progress the debate.
2. Read more about Quantcast [www.Quantcast.com](http://www.Quantcast.com) and the details of their free Publisher program: <http://www.quantcast.com/info/publisher-overview>
3. Review their white paper on their audience measurement methodology: <http://www.quantcast.com/info/methodology>. Review, if you wish, other audience measurement companies from the list provided below.
4. After this review we suggest "directly measuring" you're Web site by adding Quantcast's code. This is both free and simple to implement and would allow you to benefit from enhanced reporting immediately.
5. We recommend that DMOs adopt Quantcast an "acting standard" in the short term, offering immediate benefits while a fuller review is undertaken.
6. DMOs work together, either informally or through industry groups such as TIA and/or DMAI to more formally review the alternate solutions and define a long term "standard" for DMOs. If a switch is required from Quantcast, this could be easily undertaken based on an agreed timetable.
7. As part of this process, review the opportunity for enhanced research and analysis services including in-depth benchmarking reports.
8. Act! Finally, whatever the steps or solution, we urge follow up on the goal of standardized audience measurement. Inaction will continue the status quo, which is not beneficial to any DMO.



## Appendix & Sources

### Audience Measurement Companies (Not an exhaustive list)

Compete: [www.Compete.com](http://www.Compete.com)

ComScore [www.comScore.com](http://www.comScore.com)

HitWise: [www.HitWise.com](http://www.HitWise.com)

Nielsen: [www.NielsenMedia.com](http://www.NielsenMedia.com)

Quantcast: [www.Quantcast.com](http://www.Quantcast.com)

### Estimated Reach of DMOs

\* "State of the American Traveler Survey", Destination Analysts, July 2010. This biannual study has highlighted that 31.2% of U.S.



leisure travelers have accessed an "official" State, CVB or other DMO Web site for travel planning purposes in the previous 12 months. For a summary of the research, or for additional detail on the methodology and workings behind the 50 million audience estimate contact Miles Media

[www.MilesMedia.com](http://www.MilesMedia.com) or Destination Analysts [www.DestinationAnalysts.com](http://www.DestinationAnalysts.com).