

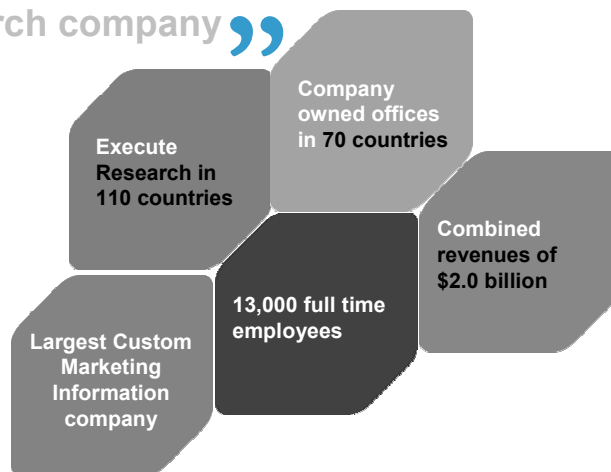
WACVB Website Evaluation

Rick Cain, SVP Travel & Leisure
April 3, 2008

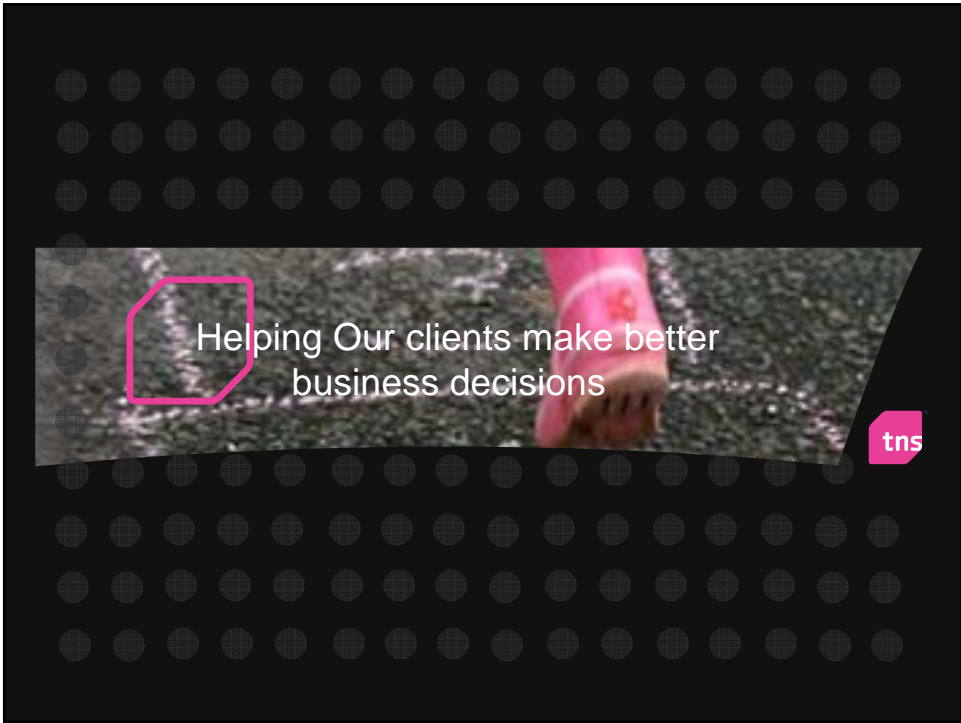
Overview of TNS



“The World largest custom market research company”



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Study Design

Intercept website users when they land on the homepage—most are 1st time visitors yet to experience the site

Agenda



Website Evaluation

- Website Return-on-Investment (ROI) Calculation
- Website Effectiveness—Maximizing ROI
- Website Perceptions and Expectations
- Website Usage and Past Trips to Destination
- Motivations for Visiting Destination and Primary Activities
- Travel Plans and User Profile

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Insights to Inform Website Strategies



Strengthen the destination brand & maximize likelihood of action

- CVB websites touch a very high-value audience

Focus website on primary audience

- Likely visitors considering & planning longer leisure trips, who are visiting the website for the first time, and are staying for a week

Capture imagination, communicate “why this destination”

- Understand & emphasize users’ key motivations such as wanting a leisurely outdoor experience in a terrific climate

Enable users to easily achieve their primary goals

- Prioritize the site’s design & features to emphasize things to do & see

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Website Return-on-Investment (ROI)

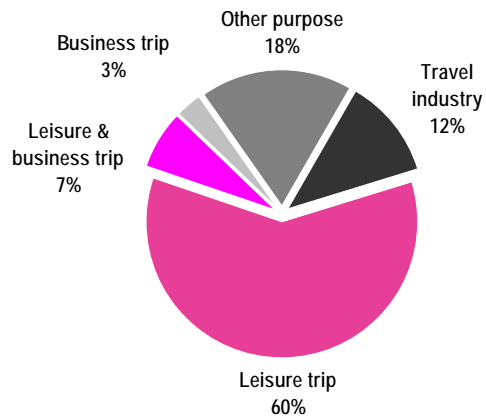
“How many tourism dollars each website dollar reaches”

ROI Input Tucson travelers vs. travel industry



- 70% of users are **travelers** considering or planning a trip
 - 120,000 monthly unique visitors X 70% = 84,000 unique **travel** Tucson site users

**Emphasize
Leisure Trips
for Travelers**



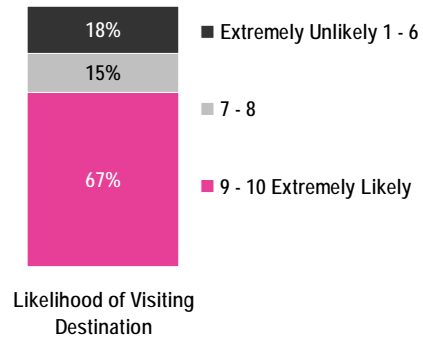
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ROI Input Likelihood of visiting Tucson



- 67% of travel users represents potential **travel conversion factor**
 - 84,000 monthly unique travel users X 67% = 56,280 likely Tucson visitors

**Maximize conversion
by delivering on
Likely Visitors'
website expectations**



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ROI Input

Value of likely visitors



- \$1,485 is likely visitors' **average budget**
 - 56,280 likely visitors X \$1,485 = \$83,575,800 potentially spent at Tucson
 - Benchmark: Travelers to Arizona spent on average \$565 (they may or may not have used a website before their last trip)

Likely Budget

Lodging	\$539
Food/Beverage/Dining (excluding groceries)	338
Shopping/Gifts/Souvenirs	185
Transportation (excluding parking) within destination	132
Other	112
Amenities (golf fees, spa, health club, etc.)	104
Groceries	68
Parking	7
Total	\$1,485

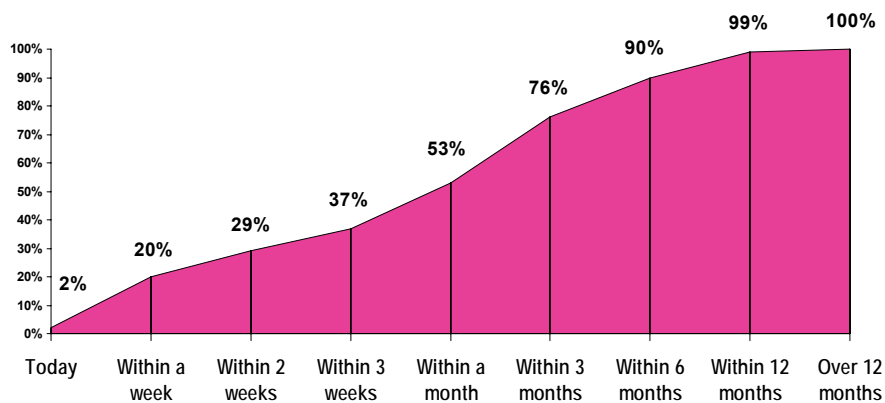
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ROI

When spending will likely occur



- ~ Half of potential spending will likely occur within a month



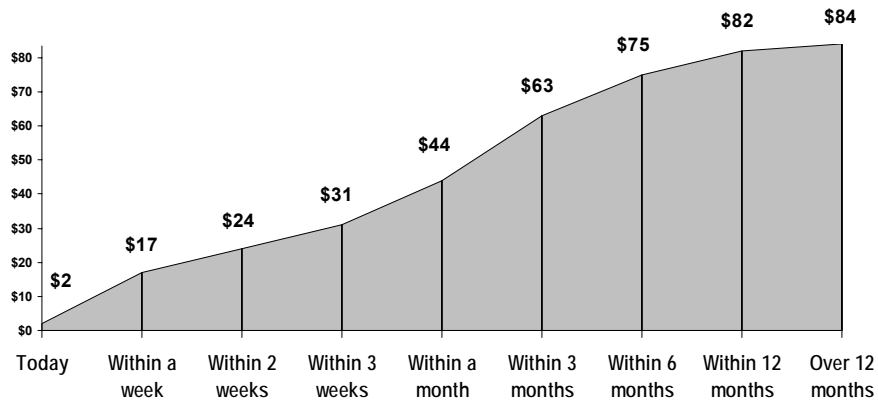
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ROI Spending realized over time



- Tucson can potentially obtain \$44,295,174 within a month
- \$83,575,800 potentially spent at destination X 53% = \$44,295,174 in a month



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ROI Input Summary and Calculation



Monthly Unique Website Users	120,000
X % Travel Users	70%
# of Unique Travel Users	84,000
X % Travel Conversion Factor	67%
# of Travel Users Potentially Visiting the Destination	56,280
X \$ Likely Spent per Travel User	\$1,485
\$ Potentially Spent at Tucson	\$83,575,800
/ \$ Monthly Website Related Investments	\$50,000
Monthly ROI (Travel \$ per Website \$)	\$1,671

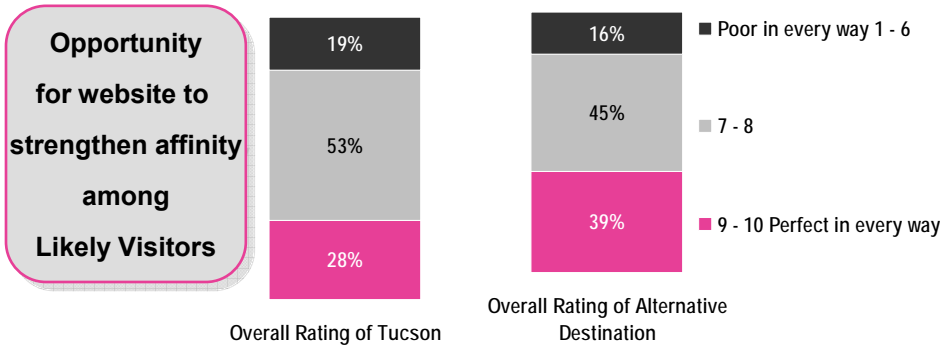
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Tucson Appeal Tucson vs. Competition



- ~1 in 4 have strong affinity to the destination
- Over 1 in 3 have strong affinity to a potential alternative destination

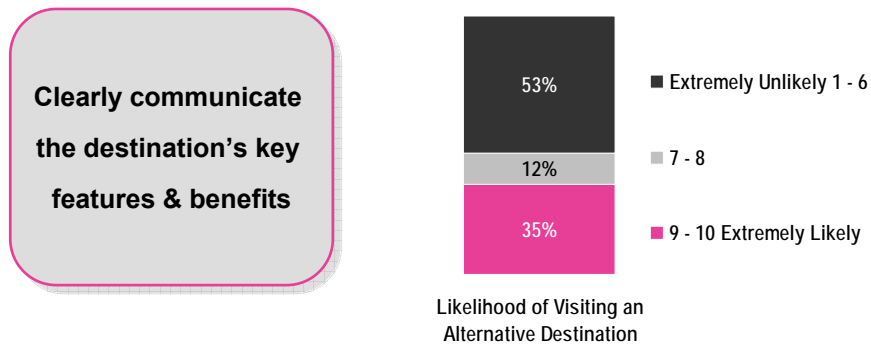


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Threat to ROI Likelihood of visiting an alternative destination instead



- Competition threatens ~1/3rd of the site's likely travel visitors
 - Travel users' **travel conversion factor** of 67% can diminish to 44%
 - \$28,690,200 potentially can be lost to competition



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Website Effectiveness

“Positive impact the site has on likelihood of visiting the destination

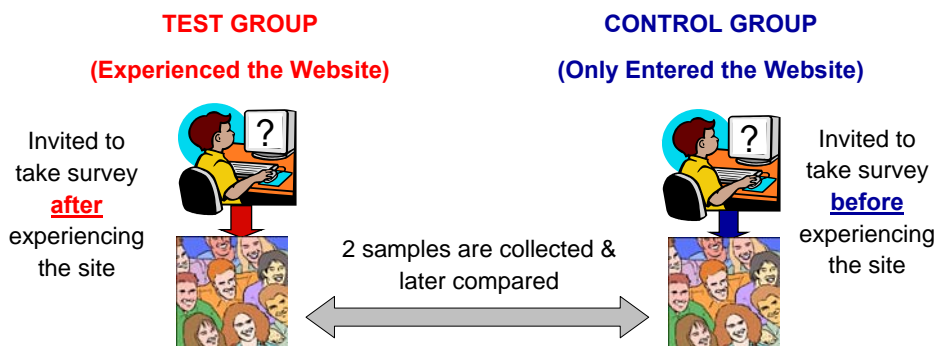
—Increasing Travel Conversion Factor to maximize ROI”

Assessing Website Effectiveness

One group has experienced the site & the other group only entered the site

Compare the two groups to isolate the effects of the website.

For example, if “likelihood of visiting destination” differs significantly between a test and control group, then the website is effective in influencing likelihood of visiting the destination.



Impacting Likelihood to Visit Benchmark results of another site: Test vs. Control



- Significant difference exists in top box likelihood of visiting the destination

Site Positively Impacts Travel Conversion Factor



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Note: this from a benchmark study that utilized the test/control methodology. The rest of this case study displays information gathered from users when they enter the site, not when they leave the site necessary for a test group.



Website Expectations & Perceptions



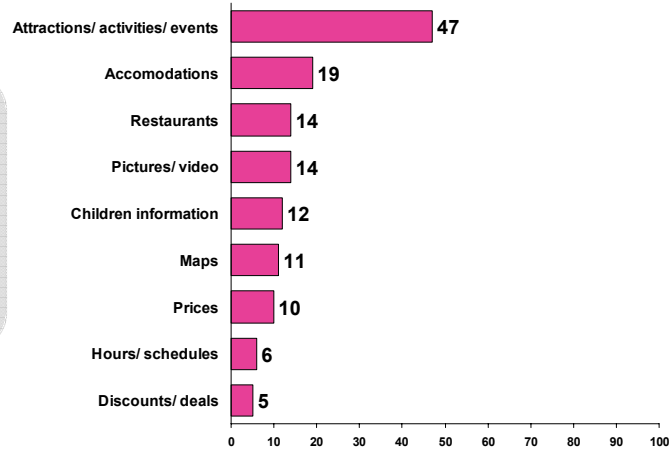
Website Expectations

Unaided open-end written expectations



Travel users want to find "great things to do & see"

Focus on users' primary motive



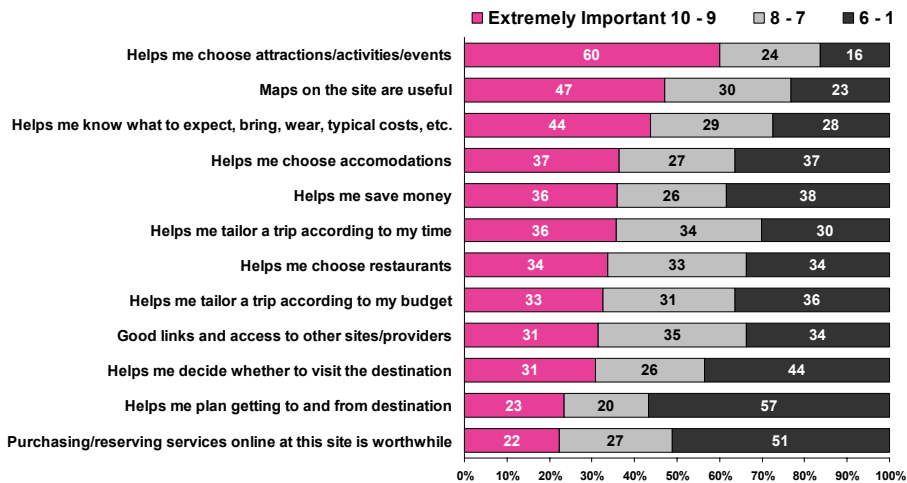
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Website Expectations

Aided responses



As a priority, the site needs to help users choose activities, provide useful maps, and inform them of what to expect



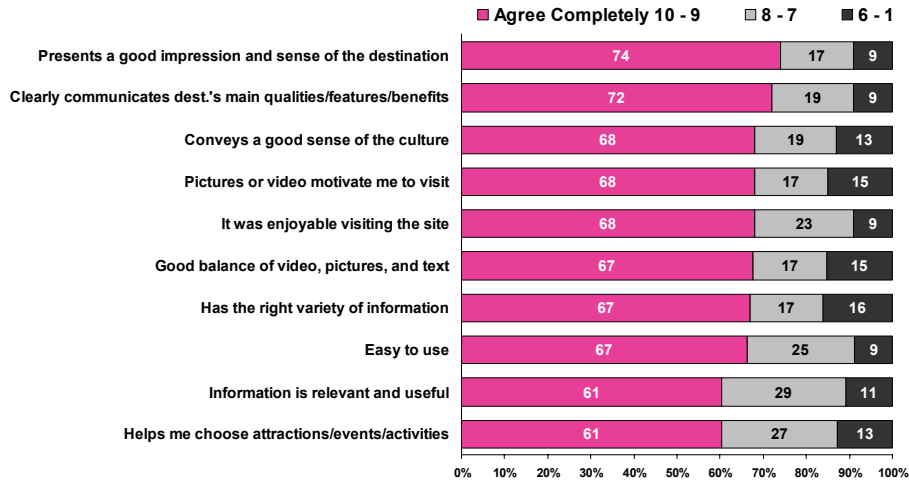
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Website Performance Experienced users



■ For the vast majority, the site communicates the destination's qualities well and provides an enjoyable experience while helping them choose activities

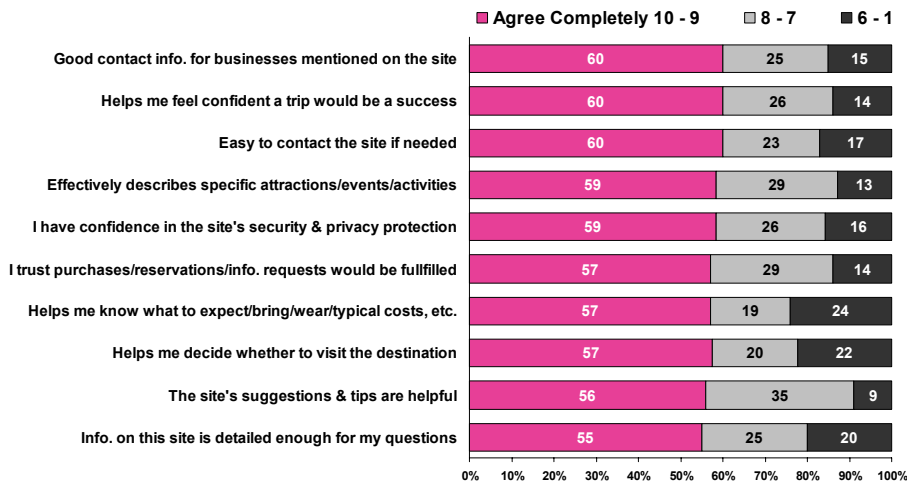


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Website Performance Experienced users



■ The site helps many feel confident a trip would be a success, however, one in four do not strongly feel the site helps them know what to expect



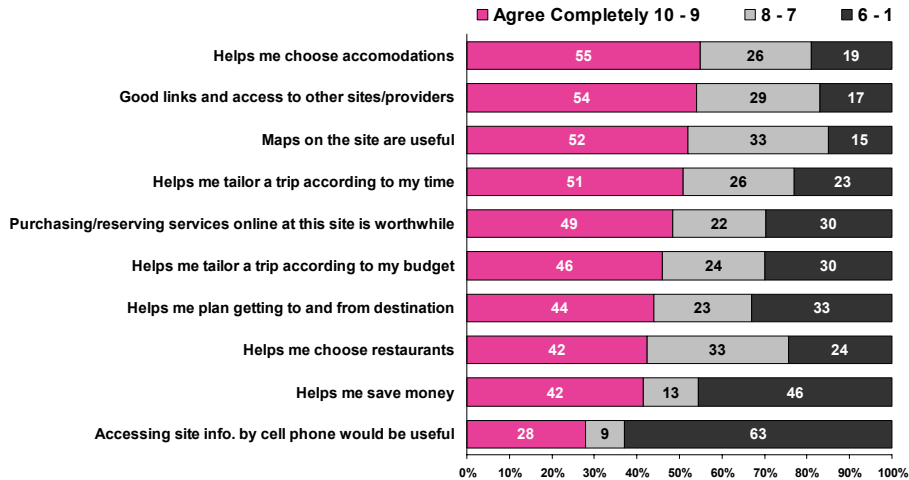
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Website Performance Experienced users



- Maps were useful for the majority
- Opportunity to address users' budgets and saving money



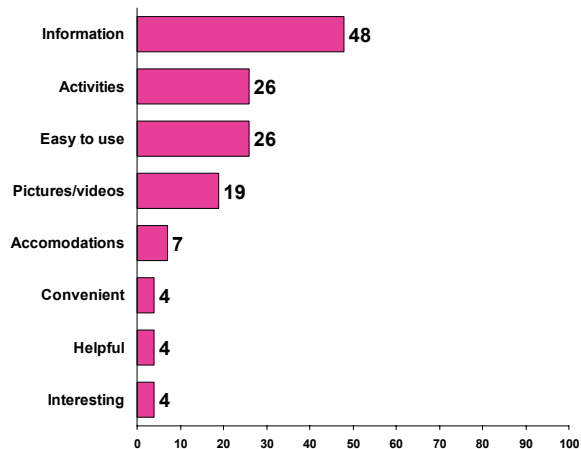
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Website Word-of-Mouth Unaided responses



- Experienced users say the site is a great source of information that is easy to use and has nice pictures

**Information
is key but
pics are also
noteworthy**



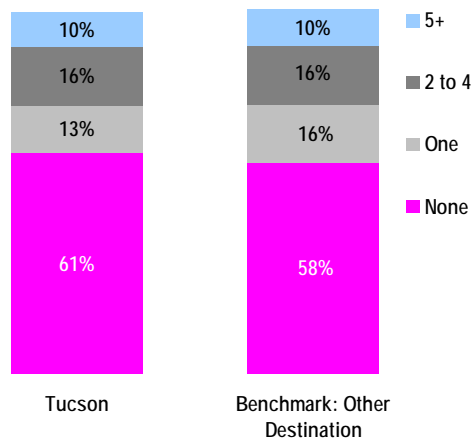
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Website Usage & Past Trips to Destination

of Previous Visits to Destination Tucson vs. benchmark destination

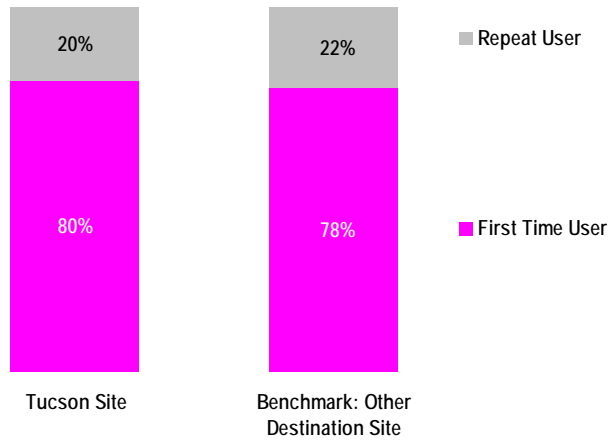
■ Majority of site users have not visited the destination



Site Usage Tucson vs. benchmark destination



- Vast majority of site visitors are first-time users

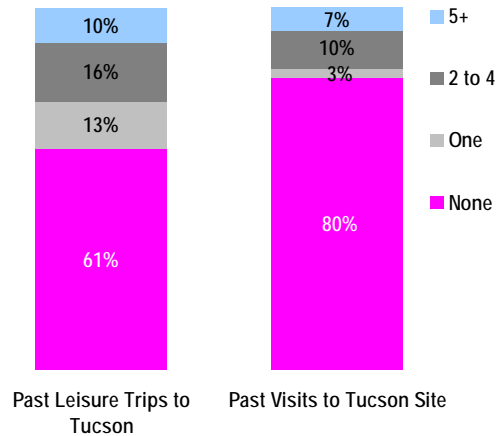


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of Previous Visits to Site & Tucson Likely visitors



- Majority of users have neither visited the site nor the Tucson previously
- ~10% of site users are *both* repeat site users & past Tucson visitors



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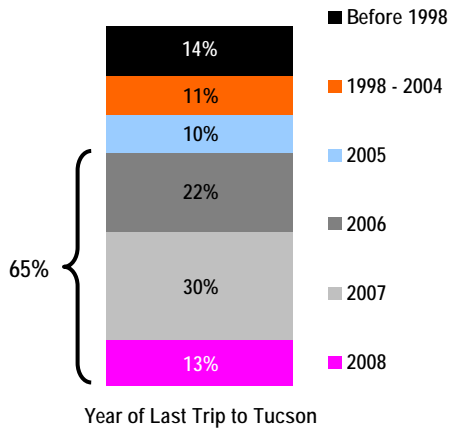


Last Leisure Trip to the Tucson

Likely visitors who visited the Tucson previously



Of the 39% who had visited Tucson previously, the majority (65%) visited recently



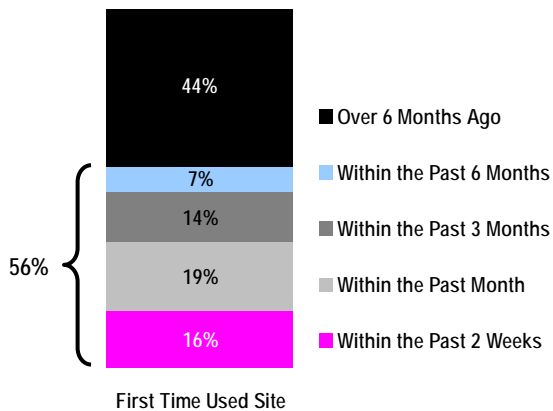
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When They First Used Tucson Site

Likely visitors



Of the 20% who had used the site previously, the majority (56%) used it recently



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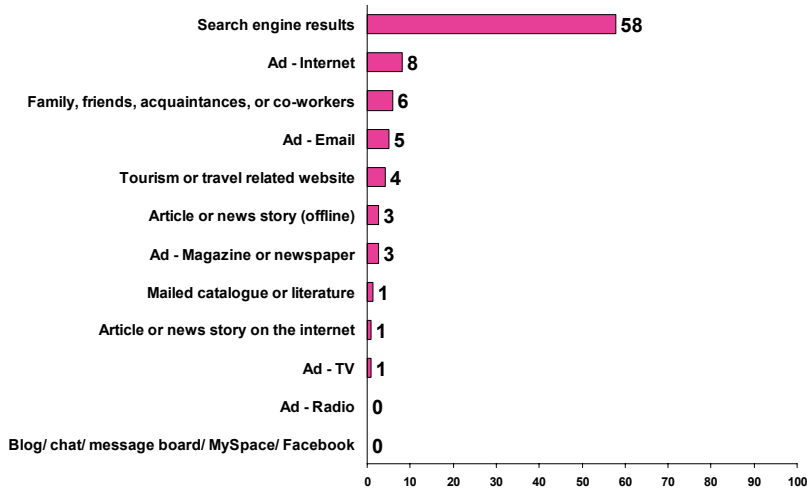


How They Heard About the Tucson Site

Likely visitors



■ Search engines are key for discovering the site



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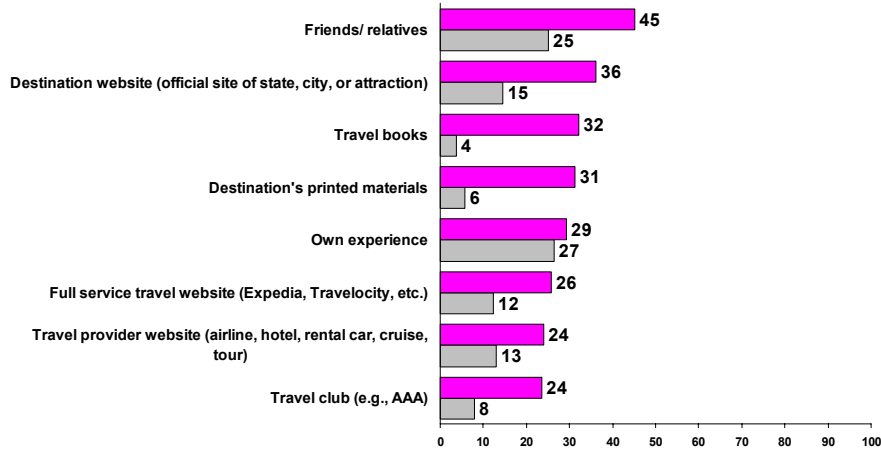
Other Sources for the Trip

Likely Tucson visitors vs. actual visitors to the Arizona



■ Other sources of information are more widely used by site users compared to actual visitors.

■ This likely reflects site users longer average stay of ~5 nights



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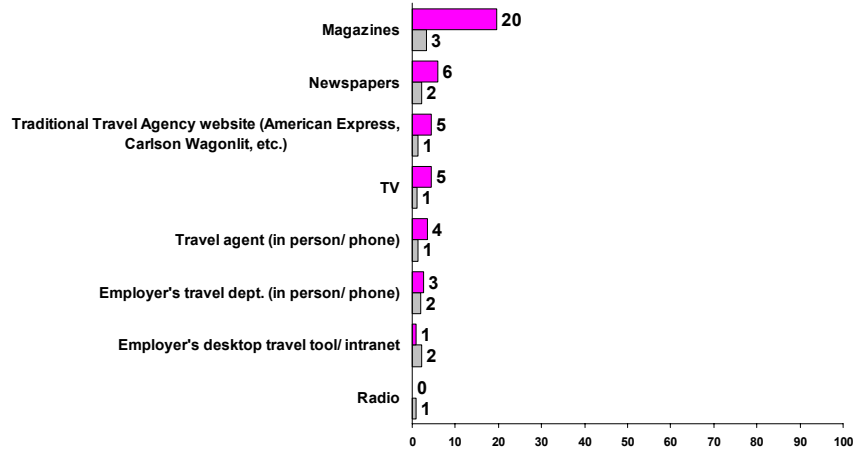


Other Sources

Likely Tucson visitors vs. actual visitors to the Arizona



■ Magazines are a popular source of travel information related to this trip



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Motivations for Visiting Tucson and Primary Activities

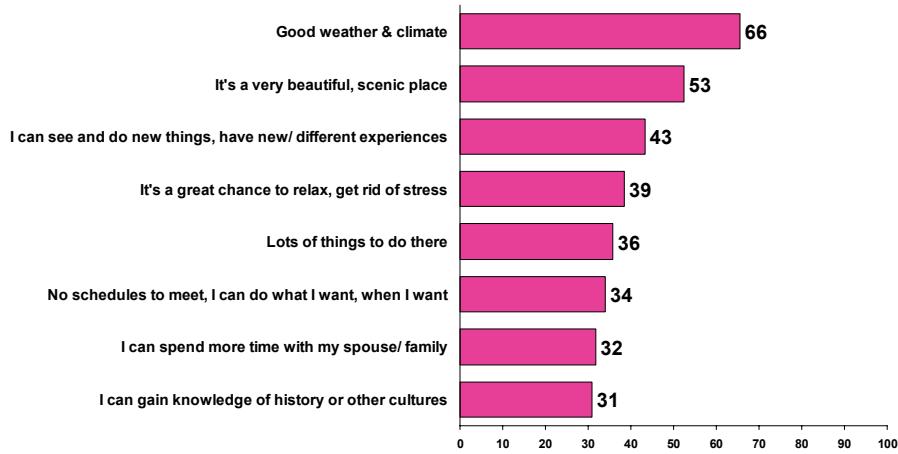


Motivations for Visiting Tucson

Likely visitors



■ Users are drawn to the Tucson's weather/climate and its beautiful scenery



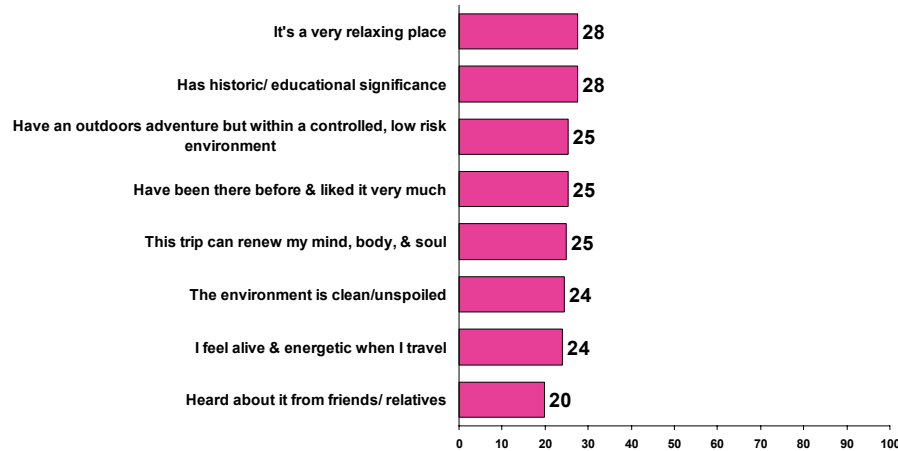
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Motivations for Visiting Tucson

Likely visitors



■ 1 in 5 have heard positive things from friends/relatives



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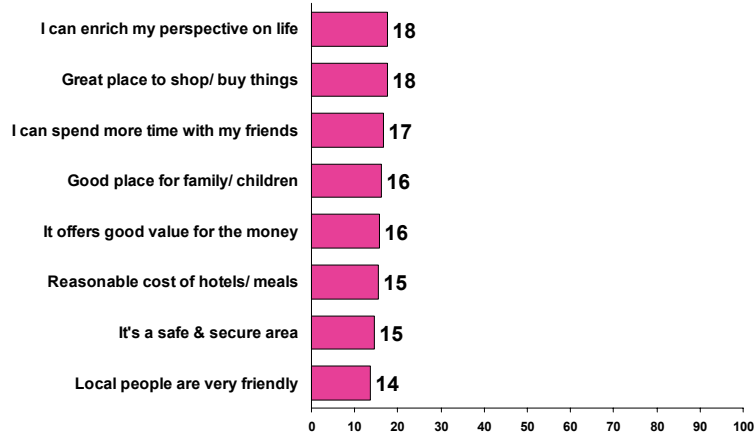


Motivations for Visiting Tucson

Likely visitors



Value and costs motivate fewer than 1 in 5 likely visitors



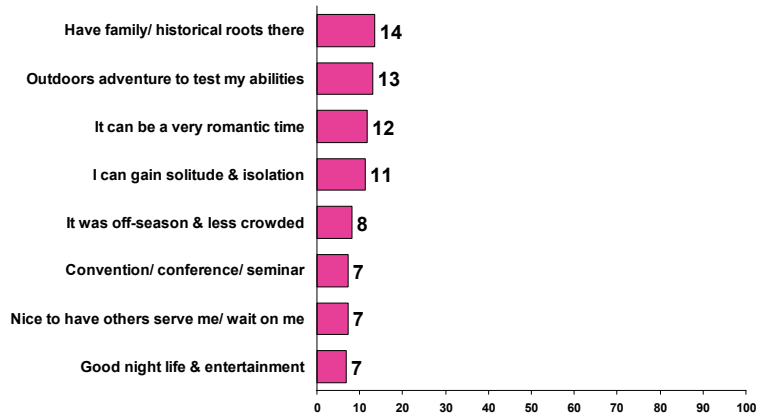
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Motivations for Visiting Tucson

Likely visitors



Vast majority are discovering Tucson, they have no family or roots there



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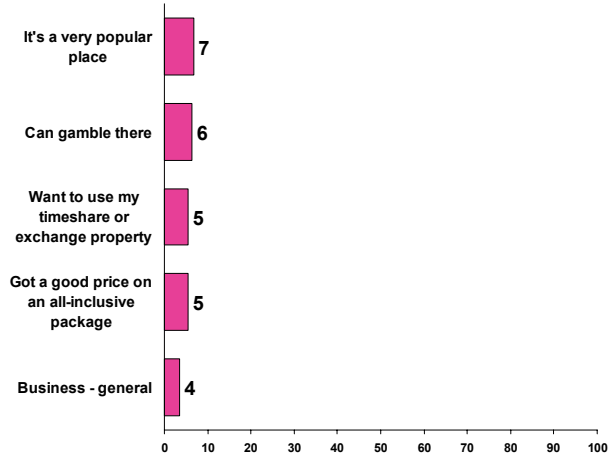


Motivations for Visiting Tucson

Likely visitors



■ Popularity does not draw people to the Tucson



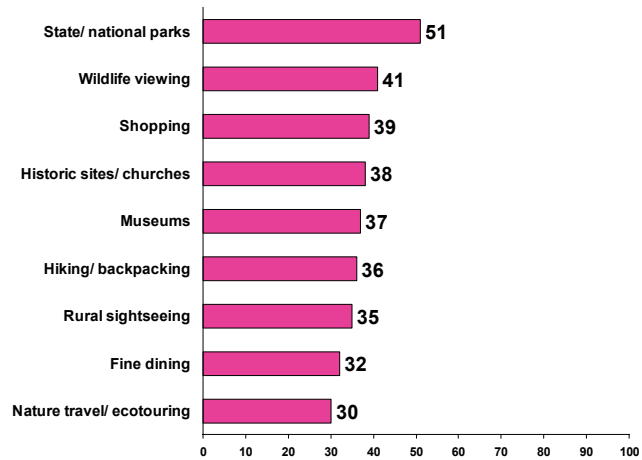
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Primary Leisure Activities

Likely visitors



■ Leisurely outdoor activities are the most popular



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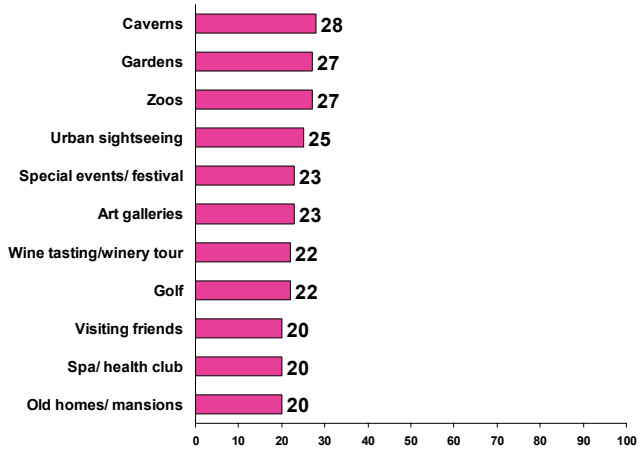


Primary Leisure Activities

Likely visitors



■ Nearly 1 in 4 are looking for time sensitive special events/festivals



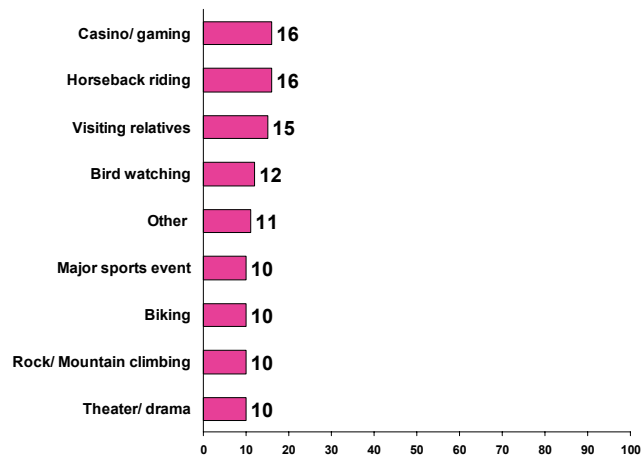
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Primary Leisure Activities

Likely visitors



■ One in 10 are interested in major sports events



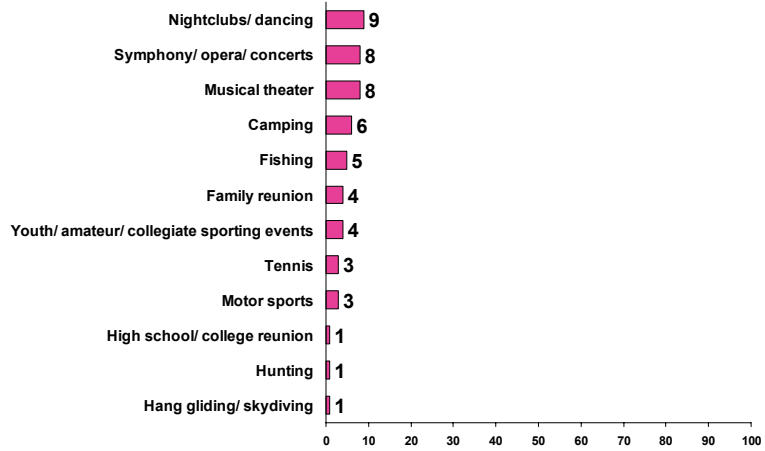
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Primary Leisure Activities Likely visitors



■ Only 1 in 10 are interesting in nightclubs/dancing



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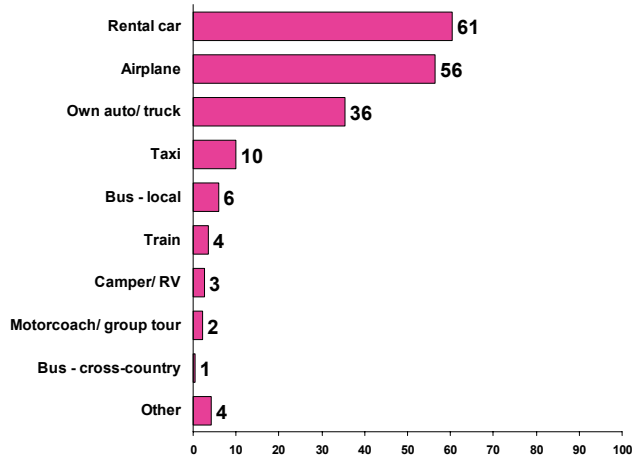
Travel Plans and User Profile



Modes of Transportation To & Within Likely visitors



- Majority will travel by airplane
- Nearly all visitors will drive a car

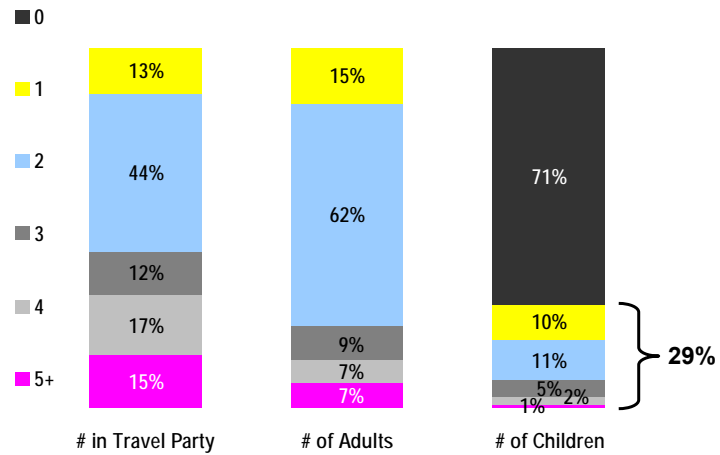


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Travel Party Size Likely visitors



- Nearly 30% of travel parties include members under 18 years of age



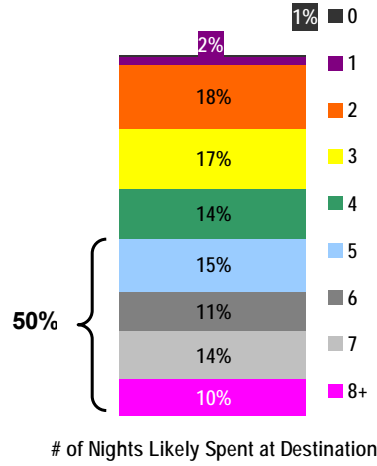
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Nights Spent Likely visitors



- Nearly no day trippers use the site
- 50% will spend at least 5 nights

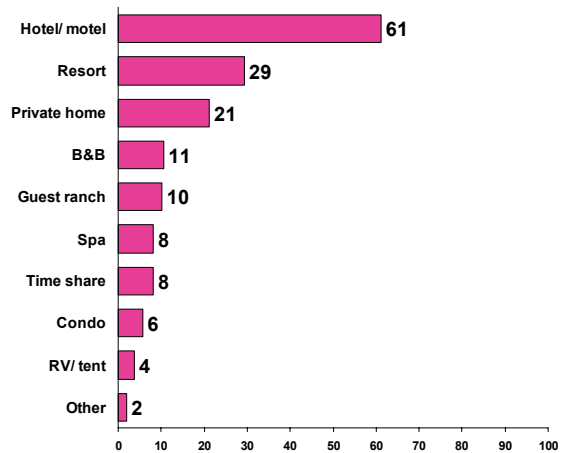


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Accommodations Likely visitors staying overnight



- Large majority will stay at a hotel/ motel, while over 1 in 4 will stay at a resort



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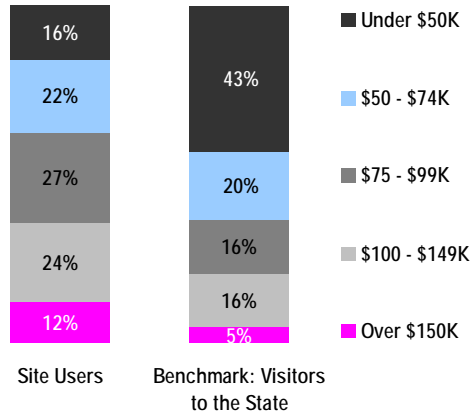


Household Income

Likely visitors



- Large majority of site users earn over the average household income (>\$50K)
- Site users earn much more than average visitors to the state



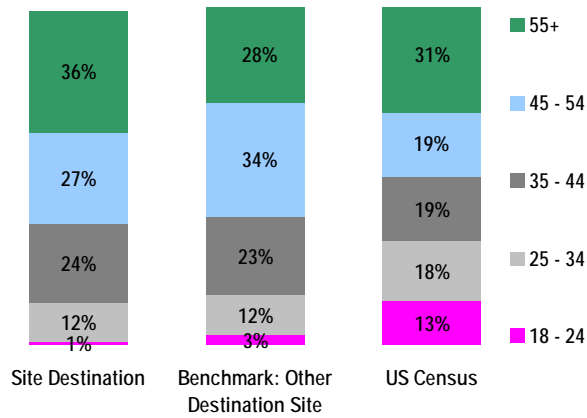
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Age

Likely visitors



- Baby-boomers comprise the majority of users



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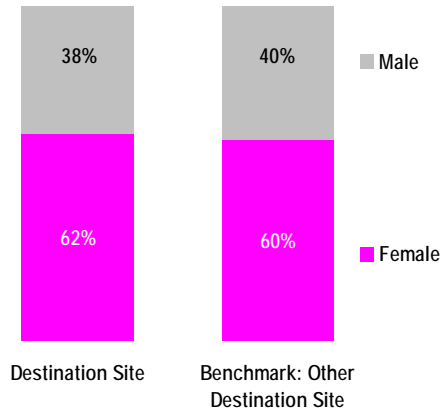


Gender

Likely visitors vs. other destination site



Majority of site visitors are Female



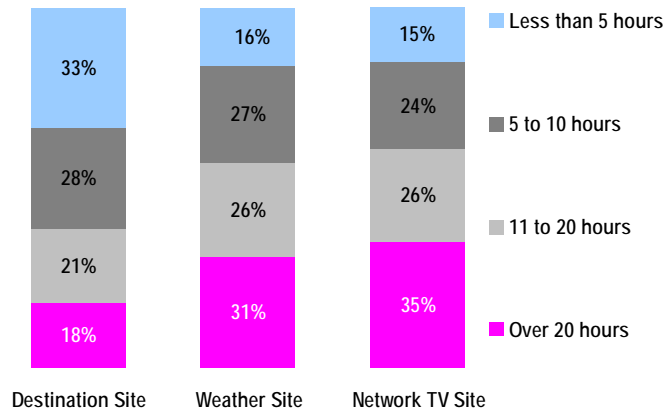
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Internet Usage

Likely visitors vs. benchmarks



Destination site users are relatively light internet users



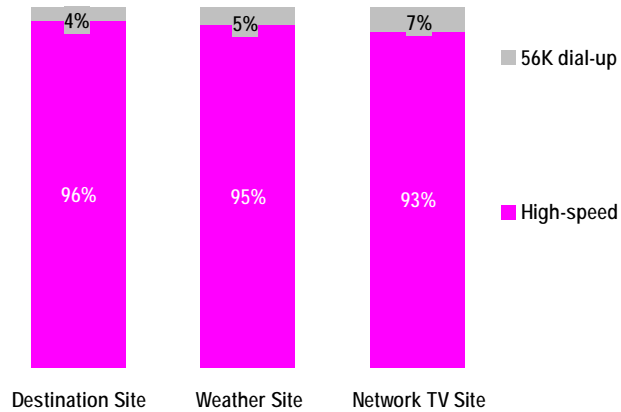
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Internet Connection Likely visitors vs. benchmarks



- Nearly all destination site users have high-speed internet



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Focus website on primary audience

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