



WACVB

Marketing Survey, April 2007

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Introduction

Research Objectives

To support the Western Association of Convention & Visitors Bureaus' goal of assisting its membership to better understand their industry, a marketing survey was conducted of member and non-member CVBs. This survey examined the current marketing activities of these CVBs in the areas of online research and tracking and international marketing. The results of this survey are presented in this report.

Methodology

The survey questionnaire was developed in collaboration between WACVB, Destination Analysts, Inc. and Miles Media Group. The content of the survey was specifically designed to supplement content that would be provided to the WACVB membership at its April 2007 Tourism Tech Summit in Albuquerque, New Mexico. In a sense, the survey was designed to give WACVB members a clear snapshot of what their colleagues are currently doing in the areas of online tracking/research and international marketing.

The research process was straightforward and happened as follows:

1. Working together, the three organizations (WACVB, Destination Analysts and Miles Media) crafted a survey questionnaire that was posted online. The complete questionnaire is available in an appendix to this report (page 33).
2. An e-mail invitation was sent to member and non-member CVBs across the range of WACVB's working geography. While the first invitation went to members and non-members, a reminder invitation was then sent to member organizations only. Finally, individual members of the WACVB and Destination Analysts teams contacted members of selected CVBs to personally ask that they complete the survey.

3. Data collected online was compiled and analyzed by Destination Analysts and put into this report.

Respondents

Staff from a total of 47 western-based CVB's responded to the survey. A list of those organizations that completed the survey (and gave their organization's name) is below.

Albany Visitors Association	Pasadena CVB
Albuquerque CVB	Plumas County Visitors Bureau
Anaheim VCB	Reno-Sparks CVA
Beverly Hills CVB	Salt Lake CVB
Big Bear Lake Resort Association	San Diego North CVB
Calaveras Visitors Bureau	San Francisco CVB
Carson City CVB	San Jose CVB
Carson Valley Visitors Authority	San Juan Islands Visitors Bureau
Catalina Island Chamber of Commerce	San Luis Obispo County VCB
City of Chandler Tourism Office	Santa Barbara CVB
Corvallis Tourism	Santa Cruz County CVC
Costa Mesa CVB	Santa Rosa CVB
Gilroy Visitors Bureau	Scottsdale CVB
Kenai CVB	Siskiyou County VB (nonmember)
Ketchum/Sun Valley Chamber & VB	Spokane CVB
Travel Klamath	Tuolumne County VB
Lake Havasu CVB	Tri-Valley CVB
Lake Tahoe Visitors Authority	Tucson CVB
Marin County Visitors Bureau	Vacaville CVB
Ogden CVB	Vallejo CVB
Olympia - Lacey - Tumwater VCB	Ventura VCB
Park City Chamber/Bureau	

Executive Summary

Introduction & Methodology

- To assist WACVB in its goal of providing its members a sense of what their industry colleagues are doing in the areas of online tracking/research and international marketing, a survey was conducted of member and non-member CVBs. This survey examined the current marketing activities of these CVBs in these two realms.
- An e-mail invitation to take the survey was sent to member and non-member CVBs across the range of the WACVBs working geography. Responding CVBs completed the survey online or printed and faxed it.

Web Site Research and Tracking

- **Web site surveys, while still not undertaken by the majority of CVBs in the sample, have been conducted or commissioned by a significant share of respondents.** In total, about four in ten (39.1%) said that they had conducted a Web site survey in the past two years.
- **The CVBs that had conducted or commissioned a Web site survey were asked if the information collected in that survey was used to help shape the design or content of their Web site. The vast majority of respondents (88.9%) said that this was in fact the case.**
- **When CVBs in our sample conducted Web site survey research, it was not only used in their Web site development, it was perceived as being important to the overall process.** The clear majority (66.7%) said that this research was “Very important” in shaping or developing the Web site. The rest of the sample gave this research some level of importance, and none said it was “Of little importance” or “Of no importance.”

- **Return on Investment (ROI) research is not currently common practice amongst the CVBs surveyed.** The most typical ROI research conducted by CVBs is on advertising campaigns (29.3%). About one-in-five (21.7%) have measured the ROI of their Web site in the past two years, and 17.4 percent have done so for their other marketing programs. Only 10.9 percent have conducted ROI research on their email promotions.
- **As with ROI research, Web site usability testing is not yet a common research practice amongst CVBs.** The majority of CVBs surveyed (69.6%) have not conducted a Web site usability study in the past two years, while about 28 percent have.
- **Those CVBs who had conducted a Web site usability study in the past two years were asked if this research was used to help shape the design and/or content of their Web site. Nearly all (92.3%) said that it was indeed used for this purpose.**
- **Similar to the assessment of Web site user surveys, CVBs who had conducted usability studies considered this research important to their Web site development.** Nearly 70 percent stated it was “Very important” to shaping their Web site, while no one said it was “of little” or “no” importance.
- **The CVBs surveyed utilize various Web statistics and measurement tools.** Although the greatest percentage uses Google Analytics/Urchin (30.4%), there was no clear preference for one product or company.
- To gauge the use of Web statistics amongst CVB senior management, the survey asked who of the responding CVBs’ staff mainly uses Web statistics and at what frequency senior management reviews these statistics. **There is an even split in the percentage of CVBs whose senior management reviews Web statistics on a monthly basis (46.7%) and CVBs whose senior management reviews this data an occasional (lesser) basis (46.7%). Only 6.7 percent of the CVBs surveyed have senior managers who review Web statistics every week or two.**
- The survey also asked how Web statistics were used in the responding organization. **The results show that nearly all CVBs use Web statistics to gauge general trends in online activity (95.7%).** Nearly 70 percent use Web statistics to measure response to their online marketing campaigns, and slightly less use the stats to measure response to both online and offline marketing campaigns (60.9%). Half use their Web statistics tool to “collect information to improve Web site”, and 28.3% use it to measure the “immediate impact of Web site changes.” While 41.3 percent of CVBs use Web statistics to measure general e-mail metrics, about half that percentage use stats to measure advanced e-mail metrics (21.7%). Slightly

more than a third of surveyed CVBs use Web site statistics to “measure progress against predefined objectives.”

International Marketing

- **It appears that the majority of western CVBs, while active in marketing their destinations abroad, do not have formal international marketing plans in place.** Only about one third of surveyed CVBs said that they currently had a formal international marketing strategy in place.
- **The CVBs surveyed had a mixed evaluation of how important international visitation is to their destinations.** The majority of respondents said that international visitation was either “Important” (34.8%) or “Of some importance” (37.0%). Yet while none said that international visitation was “Of no importance” to their destination, only 8.7 percent said it was “Extremely important.” Interestingly, of this 8.7 percent—with the exception of one destination near Yosemite National Park—all represented large destinations.
- With 37.0 percent of CVBs having a formal international marketing strategy in place and the varying assessments of how important international visitation is to their destinations, **exactly half of surveyed CVBs felt that the importance of international markets to their destination was adequately addressed in their CVB’s marketing plans and budget, while 47.8 felt that it was not.**
- **The survey collected data from CVBs representing a wide variety of marketing budgets.** To illustrate, the largest marketing budget in the sample was 350 times as large as the smallest. The mean reported marketing budget was about \$1.2 million, and the median was \$350,000.
- **The survey asked respondents to approximate the percentage of their organization’s marketing budget that is allocated to international marketing. The greatest proportion of surveyed CVBs is in the 1 to 5 percent range (41.9%), with 34.9 percent not allocating any budget at all towards international marketing.** The mean budget percentage is 4.5 percent, and the median 2.0 percent.
- **The survey asked respondents to also approximate the percentage of their organization’s marketing budget that is allocated to research. As with international marketing, the greatest proportion of responding CVBs were in the 5 percent or less range (48.8%),** with the mean at 4.6 percent and the median 3.0 percent.

- **Western CVBs appear to engage in an extensive variety of sales and marketing activities to promote their destinations to international markets.** The most common of these are traditional sales tactics such as “Market through regional partnerships” (71.7%), “Attend tradeshow” (63.0%) and “Host FAM trips” (60.9%).
- **The three most utilized international marketing activities—regional partnership marketing, tradeshow, and FAM trips—are also considered the most important (in terms of budget allocation) amongst the surveyed CVBs.**
- The survey asked what countries respondents consider to be their destinations’ primary international markets. **Western CVBs appear to share the United Kingdom as a top international market, with 73.9 percent of those surveyed selecting that nation as (one of) its primary foreign markets.** Another European country, Germany, received the second highest percentage of CVBs stating they consider it a primary international market (65.2%). North American neighbors Canada and Mexico are considered top markets by 56.5 percent and 41.3 percent respectively. Japan is a primary market for exactly half. A host of other countries are also considered top markets for a variety of CVBs.
- **It appears that not all CVBs are actively promoting to their top foreign markets.** For example, although 73.9 percent of CVBs surveyed consider the UK a top international market, only 50.0 percent are regularly engaging in promoting their destination to the British travel market. There is a similar trend for most other foreign markets.
- **Despite the majority of CVB respondents attributing some importance to international markets (page 22), only 32.6 percent of surveyed CVBs offer non-English language content on their Web site.** This is similar to the percentage that has a formal international marketing strategy in place (37.0%, page 21).
- **Those CVBs who provide non-English content on their Web site were asked how they developed this content. The majority of these CVBs used their English content and had it translated.** Just over half (53.3%) of these CVBs had their English language content professionally translated. Another 46.7 percent had a native speaker translate their English content, while 13.3 percent used an online solution. Only 13.3 percent had content specifically developed for the market by a native speaker.

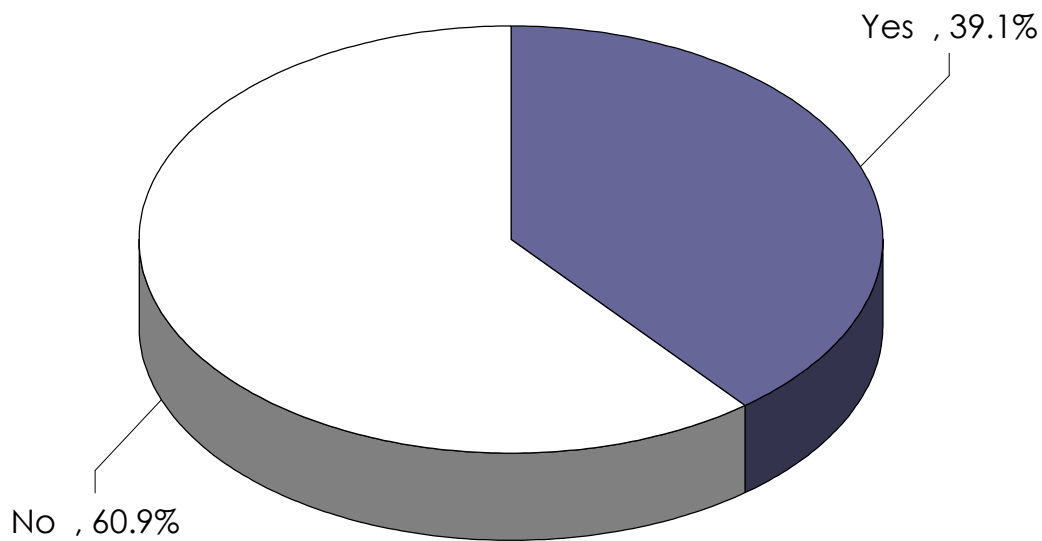
Research and Web Site Tracking Questions

The survey's first ten questions covered topics related to online research and tracking methodologies used by CVBs. For each question in this section, a graphical illustration of the results is accompanied by a brief explanation.

Web Site Surveys Commissioned

Web site surveys, while still not undertaken by the majority of CVBs in the sample, have been conducted or commissioned by a significant share of respondents. In total, about four in ten (39.1%) said that they had conducted a website survey in the past two years.

Figure 3.1: In the past two (2) years, has your organization conducted (or commissioned) any Web site user surveys to better understand your Web site users' needs and interests?

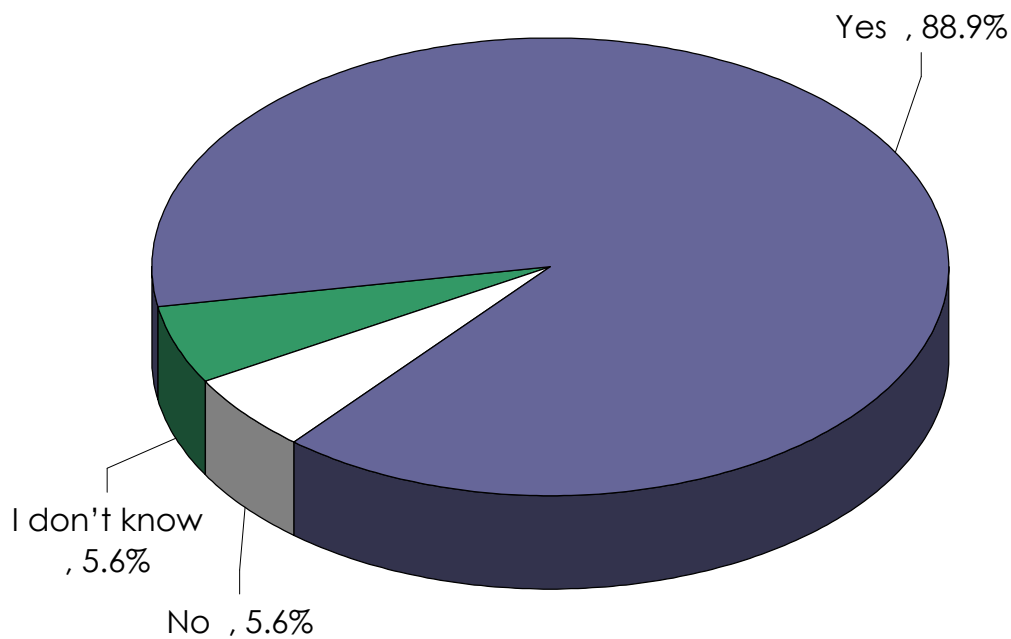


TECHNICAL NOTE: Question 1 - In the past two (2) years, has your organization conducted (or commissioned) any Web site user surveys to better understand your Web site users' needs and interests? Base: All respondents. 47 completed surveys.

Use of Research in Web Site Design

The CVBs that had conducted or commissioned a Web site survey were asked if the information collected in that survey was used to help shape the design or content of their Web site. The vast majority of respondents (88.9%) said that this was in fact the case.

Figure 3.2: Was this research used to help shape the design or content of your Web site?

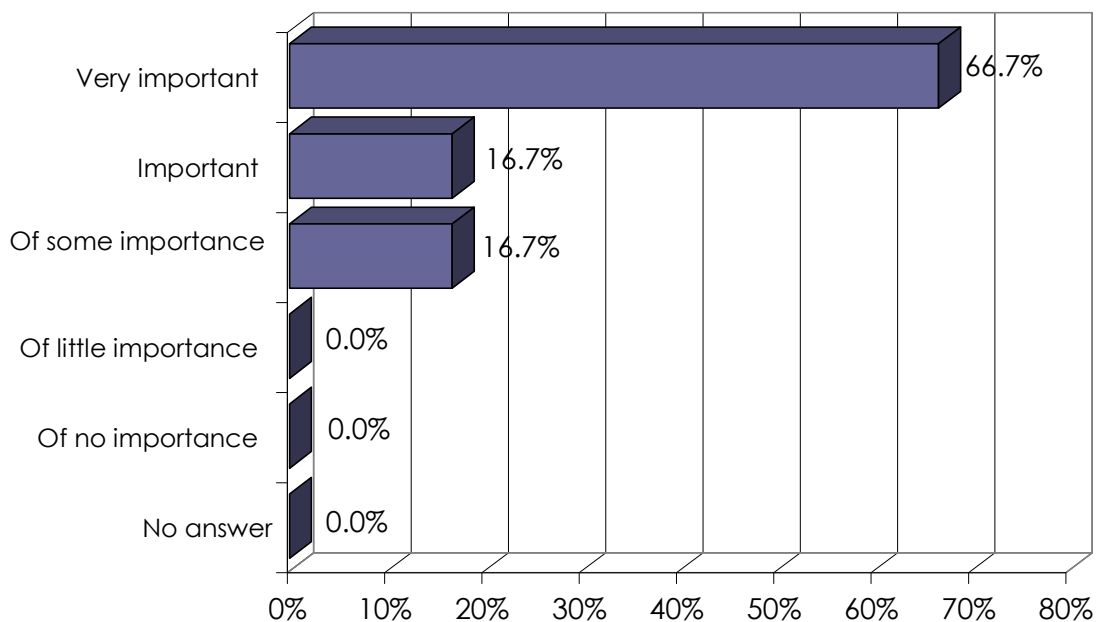


TECHNICAL NOTE: Question 2 - Was this research used to help shape the design or content of your Web site? Base: Respondents who conducted a Web site user survey in the past 2 years. 18 completed surveys.

Importance of Web Site Research

When CVBs in our sample conducted Web site survey research, it was not only used in their Web site development, it was perceived as being important to the overall process. The clear majority (66.7%) said that this research was “Very important” in shaping or developing the Web site. The rest of the sample gave this research some level of importance, and none said it was “Of little importance” or “Of no importance.”

Figure 3.3: In your opinion, how important was this research in shaping or developing your Web site?

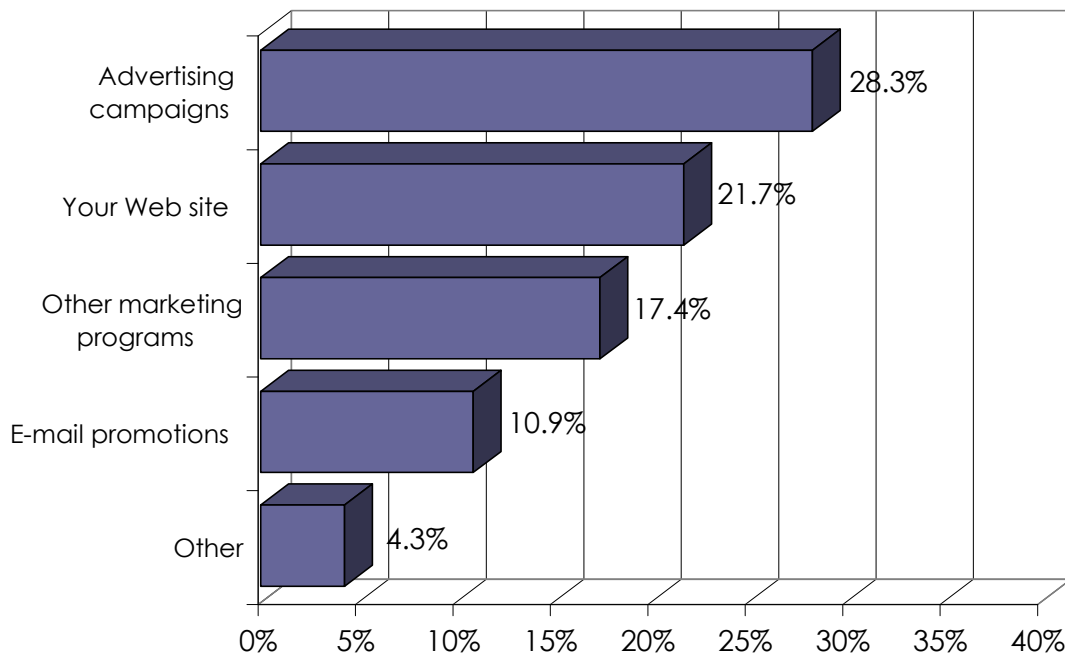


TECHNICAL NOTE: Question 3 - In your opinion, how important was this research in shaping or developing your Web site? Base: Respondents who conducted a Web site user survey in the past 2 years. 18 completed surveys.

Return on Investment Research

Return on Investment (ROI) research is not currently common practice amongst the CVBs surveyed. The most typical ROI research conducted by CVBs is on advertising campaigns (29.3%). About one-in-five (21.7%) have measured the ROI of their Web site in the past two years, and 17.4 percent have done so for their other marketing programs. Only 10.9 percent have conducted ROI research on their email promotions. Only 4.3 percent have conducted ROI research on their other promotions.

Figure 3.4: In the past two (2) years, has your organization conducted any research to measure the Return on Investment (ROI) to your community of the following? (Select all that apply.)

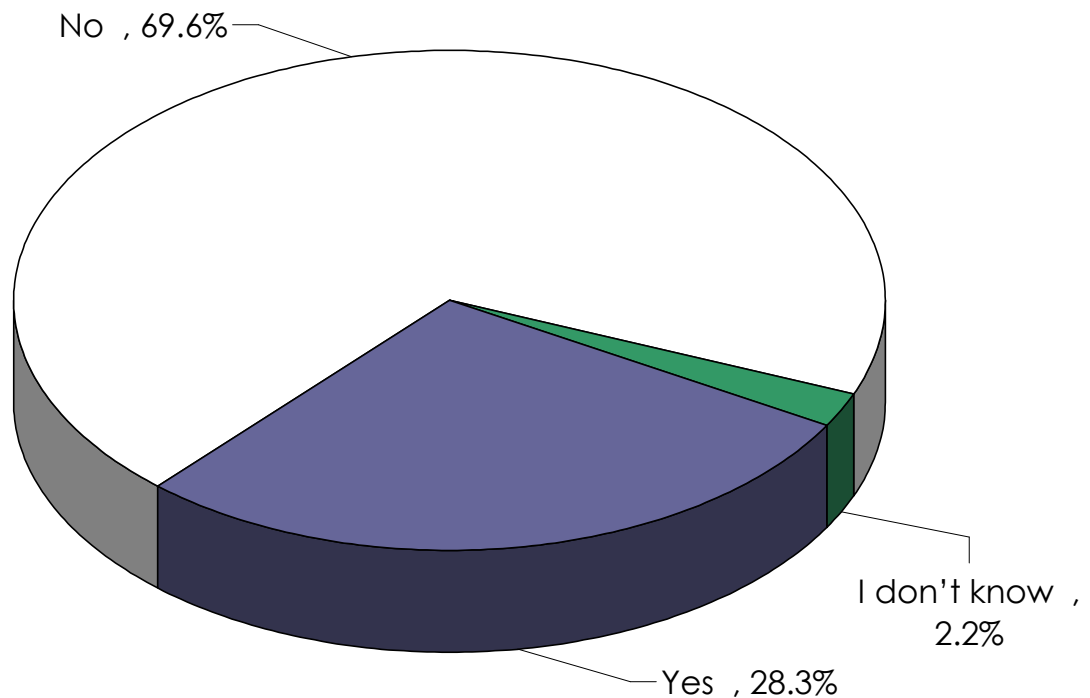


TECHNICAL NOTE: Question 4 - In the past two (2) years, has your organization conducted any research to measure the Return on Investment (ROI) to your community of the following? (Select all that apply.) Base: All respondents. 47 completed surveys.

Conducted Web Site Usability Tests

As with ROI research, Web site usability testing is not yet an common research practice amongst CVBs. The majority of CVBs surveyed (69.6%) have not conducted a Web site usability study in the past two years, while about 28 percent have.

Figure 3.5: In the past two (2) years, has your organization conducted (or commissioned) a Web site usability study of your Web site?

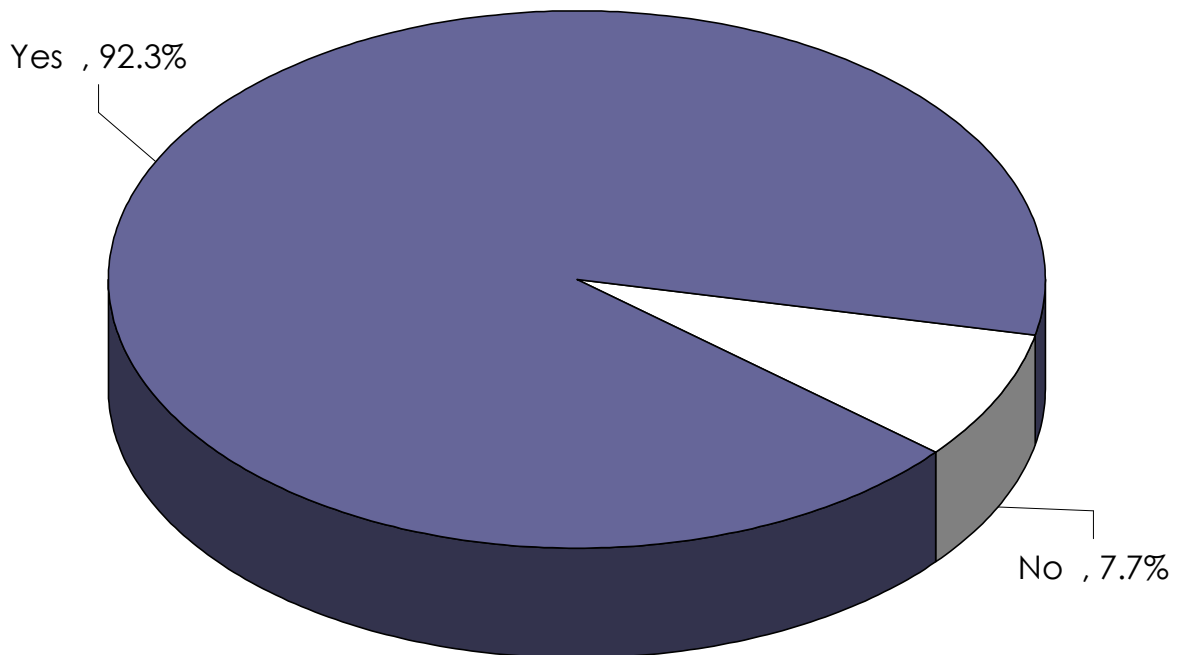


TECHNICAL NOTE: Question 5 - In the past two (2) years, has your organization conducted (or commissioned) a Web site usability study of your Web site? Base: All respondents. 47 completed surveys.

Web Site Usability and Design

Those CVBs who had conducted a Web site usability study in the past two years were asked if this research was used to help shape the design and/or content of their Web site. Nearly all (92.3%) said that it was indeed used for this purpose.

Figure 3.6 - Was this usability research used to help shape the design or content of your Web site?

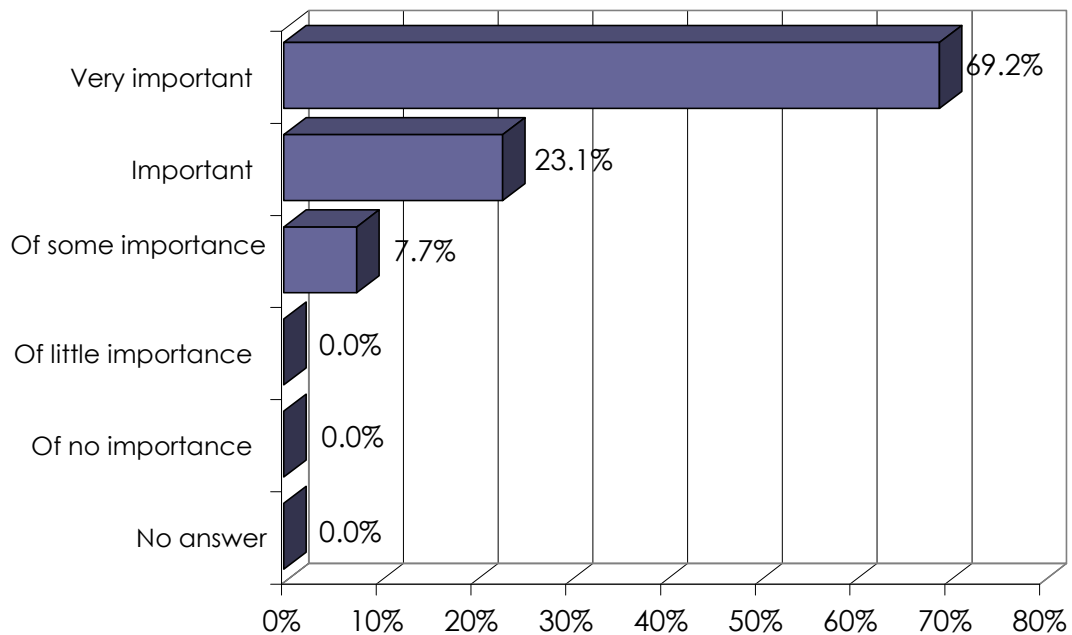


TECHNICAL NOTE: Question 6 - Was this usability research used to help shape the design or content of your Web site? Base: Respondents who conducted a Web site usability study in the past two years. 13 completed surveys.

Importance of Usability Tests

Similar to the assessment of Web site user surveys, CVBs who had conducted usability studies considered this research important to their Web site development. Nearly 70 percent stated it was “Very important” to shaping their Web site, while no one said it was “of little” or “no” importance.

Figure 3.7 - In your opinion, how important was this usability research in shaping or developing your Web site?

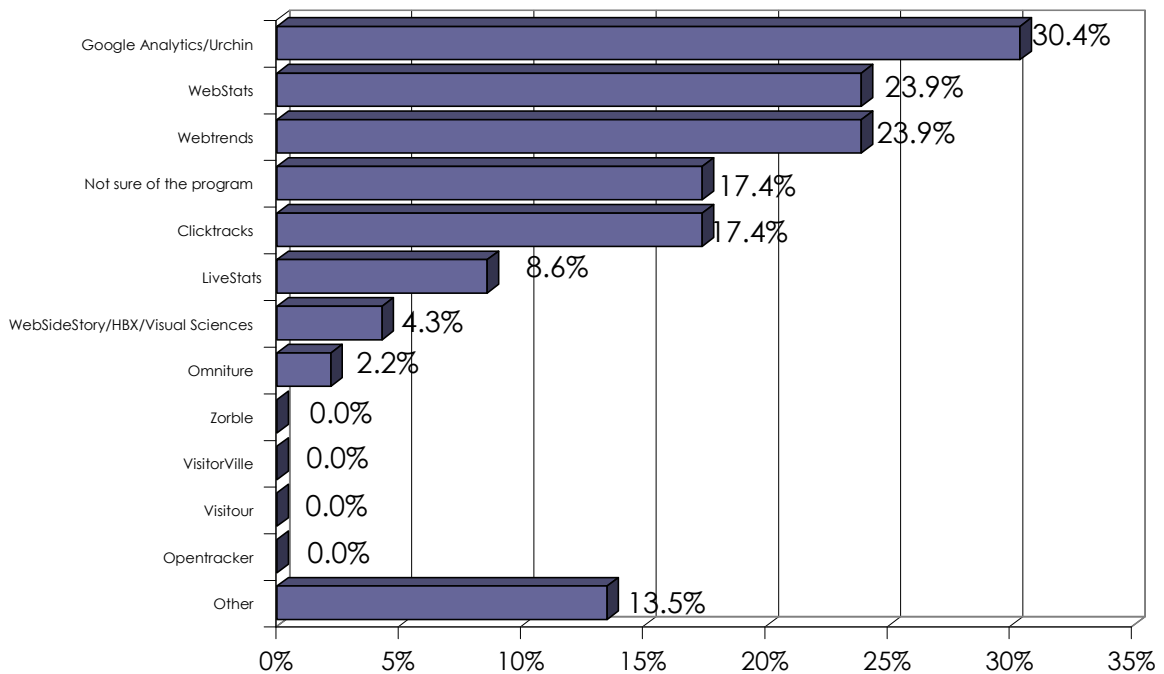


TECHNICAL NOTE: Question 7 - In your opinion, how important was this usability research in shaping or developing your Web site? Base: Respondents who conducted a Web site usability study in the past two years. 13 completed surveys.

Web Statistics Tool Used

The CVBs surveyed utilize various Web statistics and measurement tools. Although the greatest percentage uses Google Analytics/Urchin (30.4%), there was no clear preference for one product or company.

Figure 3.8 - Which of the following Web statistics and measurement tool(s) are you (or your Web vendor) currently using on your Web site? (Please select all that apply.)

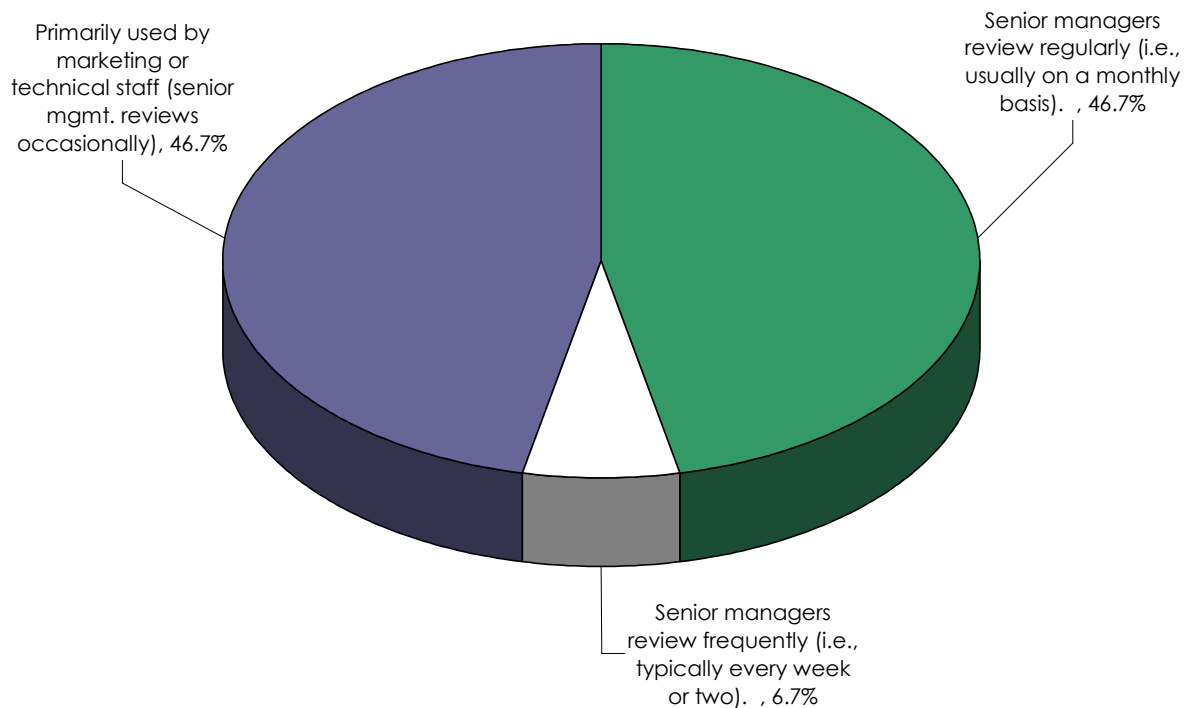


TECHNICAL NOTE: Question 8 - Which of the following Web statistics and measurement tool(s) are you (or your Web vendor) currently using on your Web site? (Please select all that apply). Base: All respondents. 47 completed surveys.

Main Users of Web Statistics

To gauge the use of Web statistics amongst CVB senior management, the survey asked who of the responding CVBs' staff mainly uses Web statistics and at what frequency senior management reviews these statistics. There is an even split in the percentage of CVBs whose senior management reviews Web statistics on a monthly basis (46.7%) and CVBs whose senior management reviews this data an occasional (lesser) basis (46.7%). Only 6.7 percent of the CVBs surveyed have senior managers who review Web statistics every week or two.

Figure 3.9 - Which best describes who mainly uses Web statistics in your organization? (Select one.)

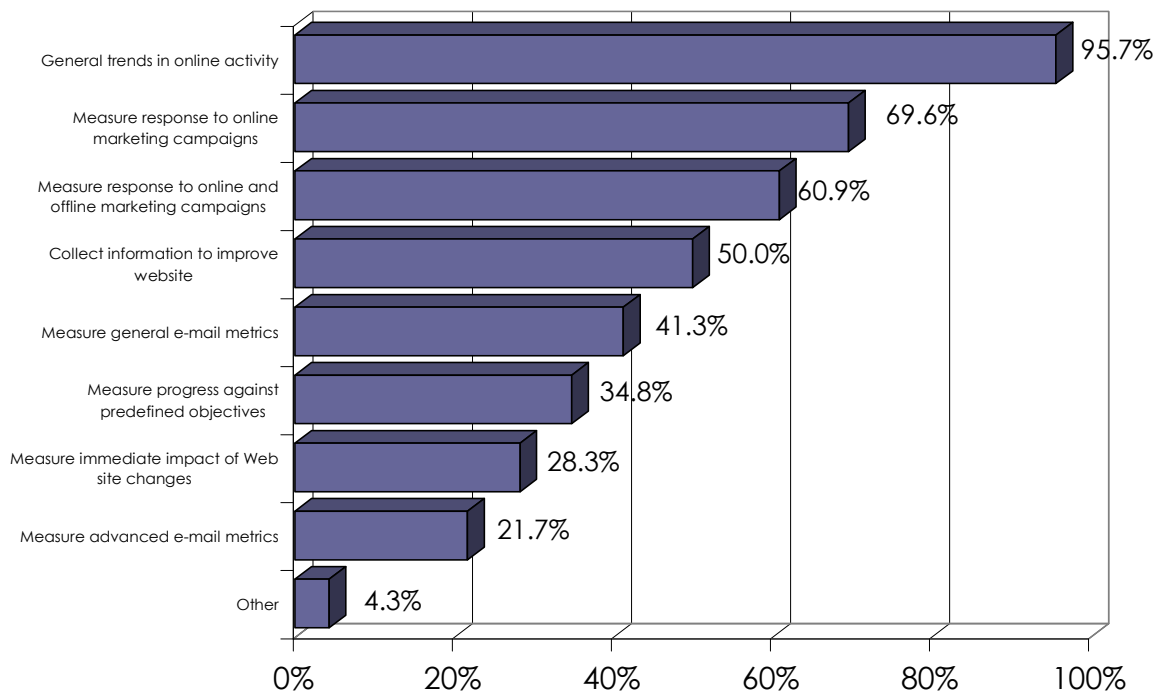


TECHNICAL NOTE: Question 9 - Which best describes who mainly uses Web statistics in your organization? (Select one). Base: All respondents. 47 completed surveys.

Use of Web Statistics

The survey also asked how Web statistics were used in the responding organization. The results show that nearly all CVBs use Web statistics to gauge general trends in online activity (95.7%). Nearly 70 percent use Web statistics to measure response to their online marketing campaigns, and slightly less use the stats to measure response to both online and offline marketing campaigns (60.9%). Half use their Web statistics tool to “collect information to improve website”, and 28.3% use it to measure the “immediate impact of Web site changes.” While 41.3 percent of CVBs use Web statistics to measure general e-mail metrics, about half that percentage use stats to measure advanced e-mail metrics (21.7%). Slightly more than a third of surveyed CVBs use Web site statistics to “measure progress against predefined objectives.”

Figure 3.10 - How have you used Web statistics in the last year? (Please select all that apply.)



TECHNICAL NOTE: Question 10 - How have you used Web statistics in the last year? (Please select all that apply.) Base: All respondents. 47 completed surveys.

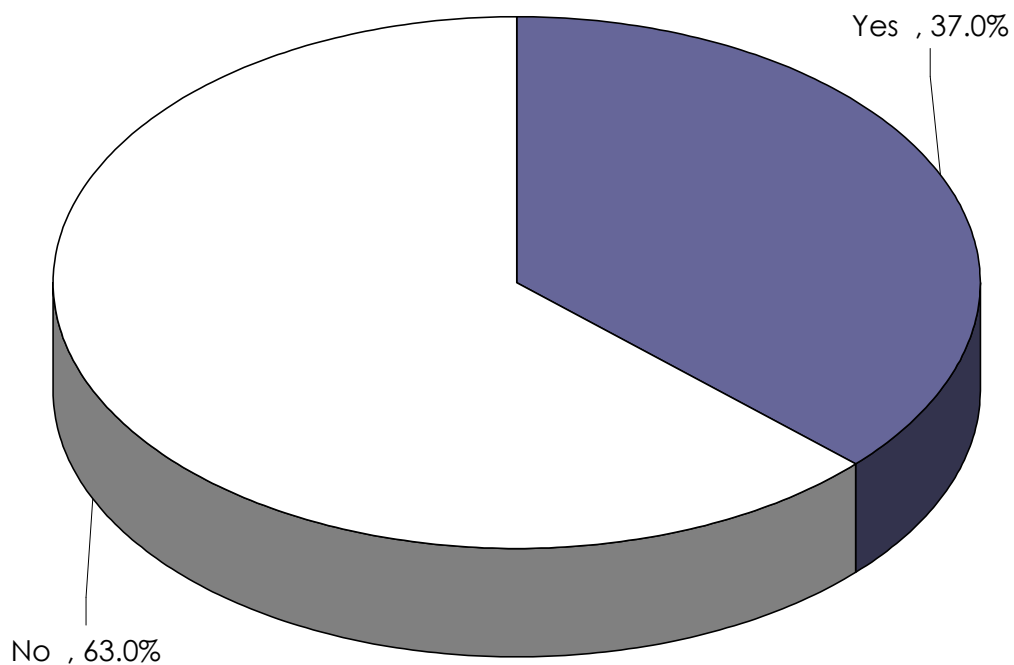
Questions on International Marketing

The second set of questions in the survey covered topics on CVB activities related to international marketing. In the section that follows, a graphical illustration of the results is again accompanied by a brief explanation.

International Marketing Strategies

It appears that the majority of western CVBs, while active in marketing their destinations abroad, do not have formal international marketing plans in place. Only about one third of surveyed CVBs said that they currently had a formal international marketing strategy in place.

Figure 4.1 - Does your organization have a formal international marketing strategy in place?

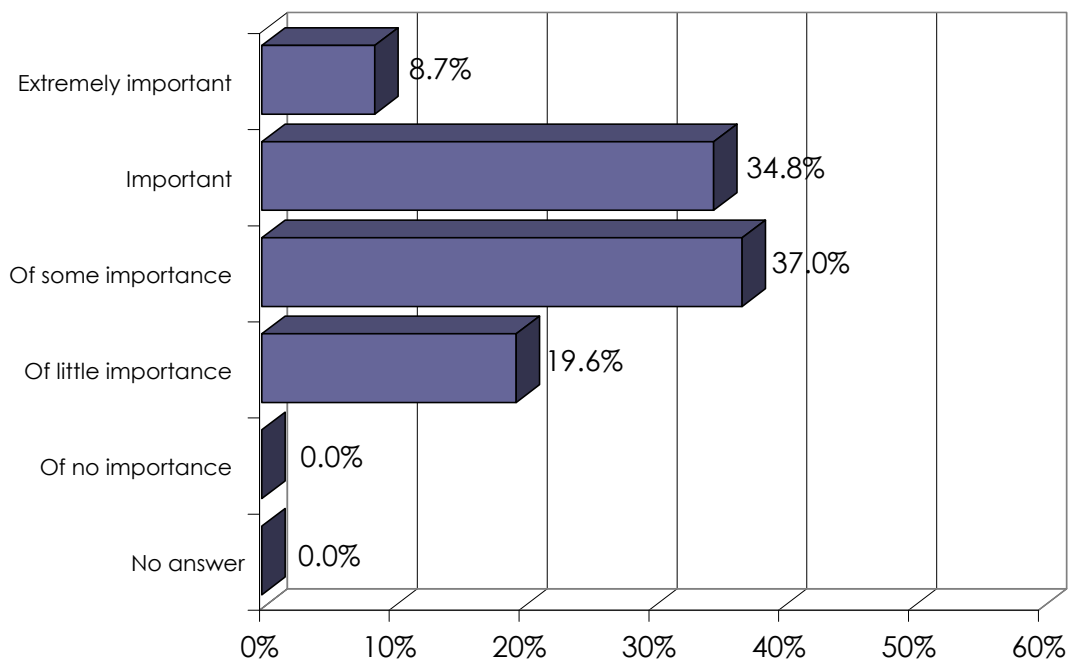


TECHNICAL NOTE: Question 11 - Does your organization have a formal international marketing strategy in place? Base: All respondents. 47 completed surveys.

Importance of International Visitation

The CVBs surveyed had a mixed evaluation of how important international visitation is to their destinations. The majority of respondents said that international visitation was either “Important” (34.8%) or “Of some importance” (37.0%). Yet while none said that international visitation was “Of no importance” to their destination, only 8.7 percent said it was “Extremely important.” Interestingly, of this 8.7 percent—with the exception of one destination near Yosemite National Park—all represented large destinations.

Figure 4.2: How important is international visitation to your destination?

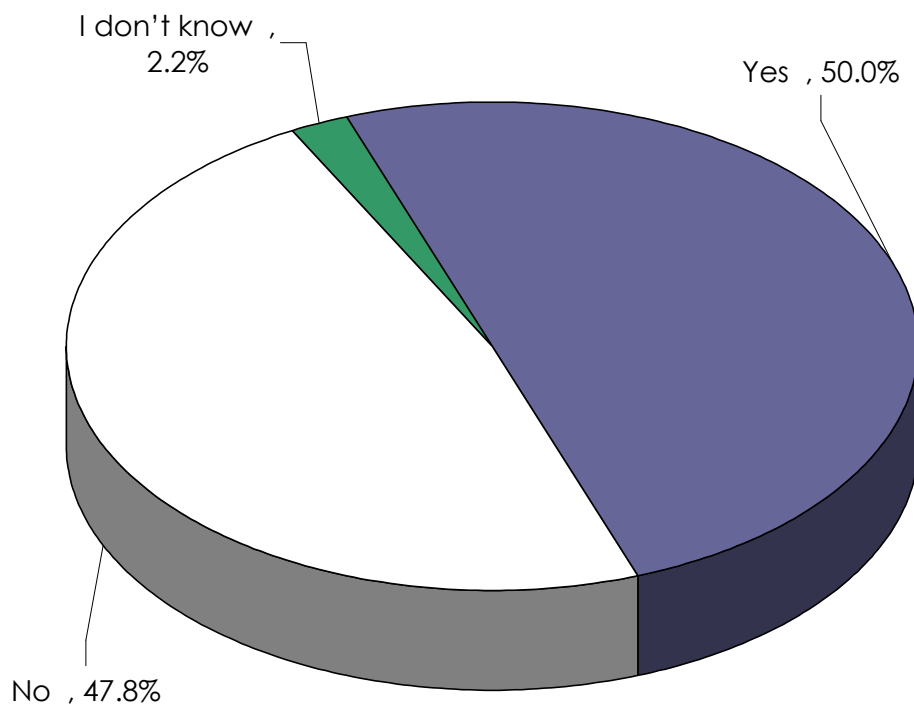


TECHNICAL NOTE: Question 12 - How important is international visitation to your destination? Base: All respondents. Base: All respondents. 47 completed surveys.

International Markets

With 37.0 percent of CVBs having a formal international marketing strategy in place and the varying assessments of how important international visitation is to their destinations, exactly half of surveyed CVBs felt that the importance of international markets to their destination was adequately addressed in their CVB's marketing plans and budget, while 47.8 felt that it was not.

Figure 4.3 - Do you believe the importance of international markets to your destination is adequately addressed in your organization's marketing plans and budget?

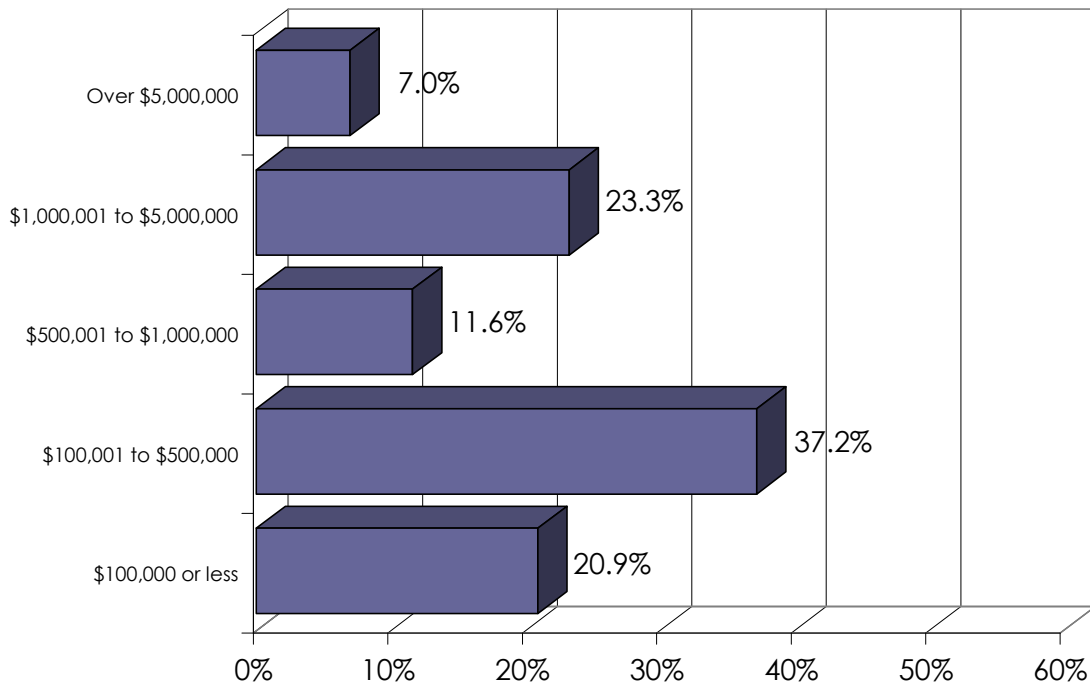


TECHNICAL NOTE: Question 13 - Do you believe the importance of international markets to your destination is adequately addressed in your organization's marketing plans and budget? Base: All respondents. 47 completed surveys.

Annual Marketing Budget

The survey collected data from CVBs representing a wide variety of marketing budgets. To illustrate, the largest marketing budget in the sample was 350 times as large as the smallest. The mean reported marketing budget was about \$1.2 million, and the median was \$350,000.

Figure 4.4 - What is your organization's current total annual marketing budget? (Please exclude staff salaries.)

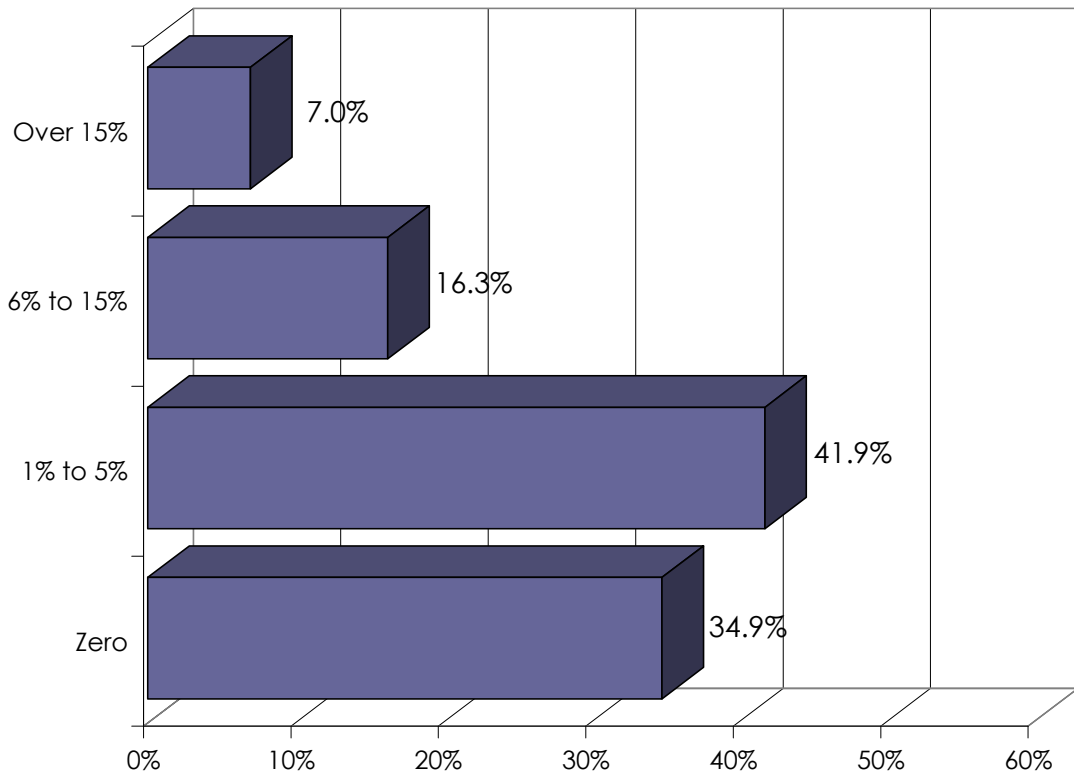


TECHNICAL NOTE: Question 14 - What is your organization's current total annual marketing budget? (Please exclude staff salaries.) Base: All respondents. 47 completed surveys.

Allocation of Marketing Budget: International Marketing

The survey asked respondents to approximate the percentage of their organization's marketing budget that is allocated to international marketing. The greatest proportion of surveyed CVBs is in the 1 to 5 percent range (41.9%), with 34.9 percent not allocating any budget at all towards international marketing. The mean budget percentage is 4.5 percent, and the median 2.0 percent.

Figure 4.5 - Approximately what percentage of your organization's annual marketing budget (excluding salaries) is specifically allocated to the following? (Indicate an approximate percent below.)

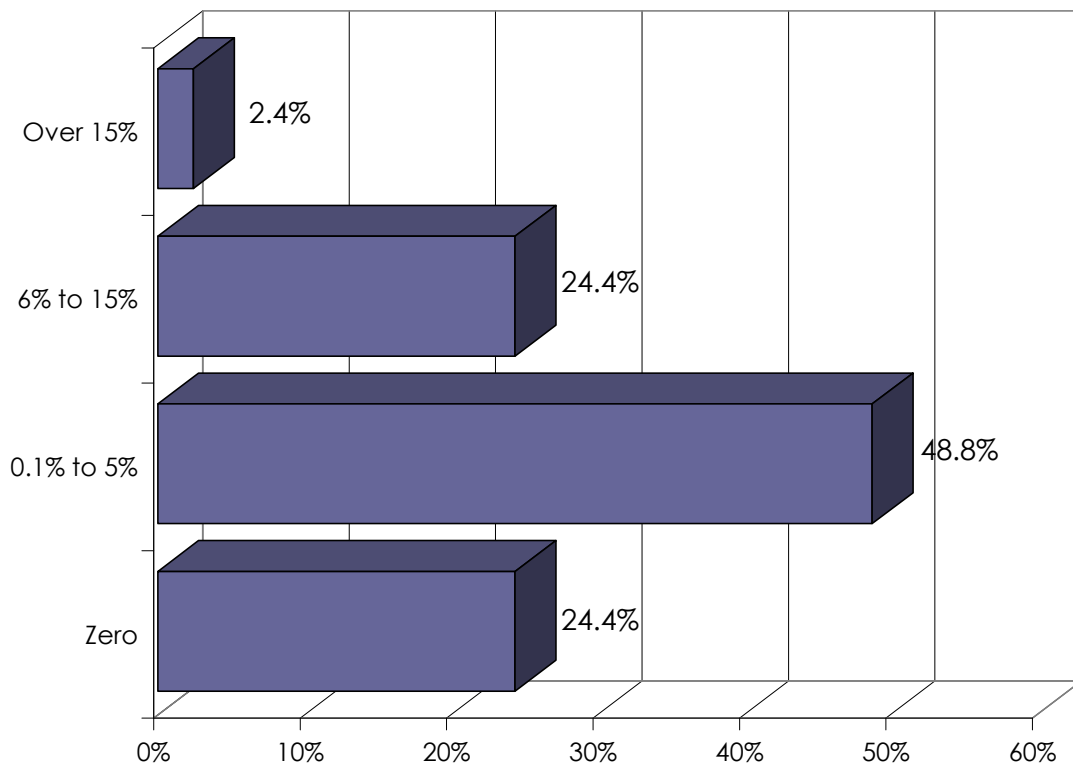


TECHNICAL NOTE: Question 15 - Approximately what percentage of your organization's annual marketing budget (excluding salaries) is specifically allocated to the following? (Indicate an approximate percent below.) Base: All respondents. 47 completed surveys.

Allocation of Marketing Budget: Research

The survey asked respondents to also approximate the percentage of their organization's marketing budget that is allocated to research. As with international marketing, the greatest proportion of responding CVBs were in the 5 percent or less range (48.8%), with the mean at 4.6 percent and the median 3.0 percent.

Figure 4.6 - Approximately what percentage of your organization's annual marketing budget (excluding salaries) is specifically allocated to the following? (Indicate an approximate percent below.)

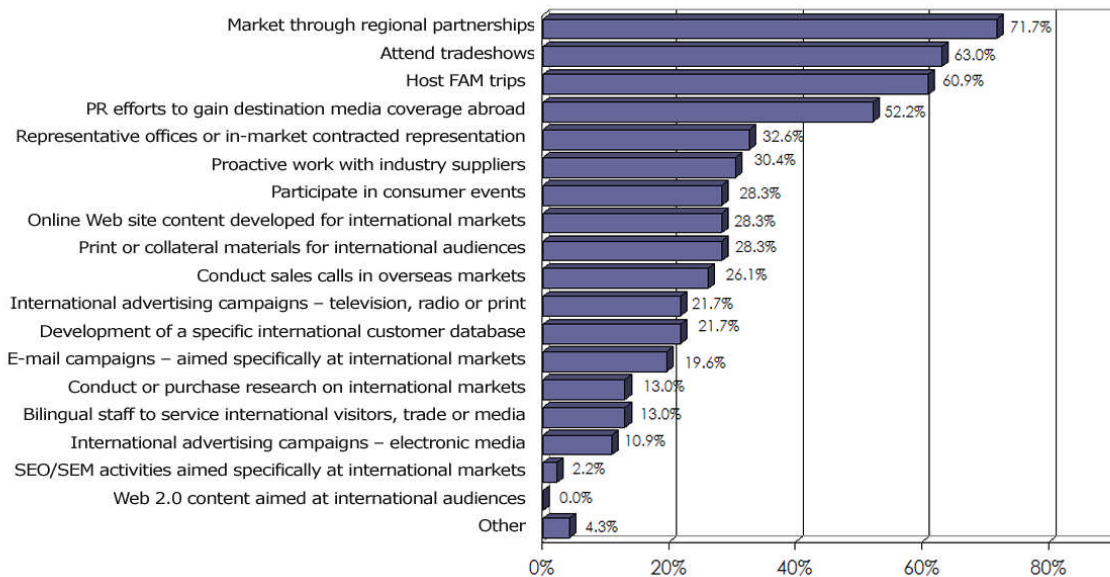


TECHNICAL NOTE: Question 15 - Approximately what percentage of your organization's annual marketing budget (excluding salaries) is specifically allocated to the following? (Indicate an approximate percent below.) Base: All respondents. 47 completed surveys.

International Promotions Used

Western CVBs appear to engage in an extensive variety of sales and marketing activities to promote their destinations to international markets. The most common of these are traditional sales tactics such as “Market through regional partnerships” (71.7%), “Attend tradeshows” (63.0%) and “Host FAM trips” (60.9%).

Figure 4.7 - Which of the following activities does your organization use to promote your destination to international markets? (Select all that apply.)

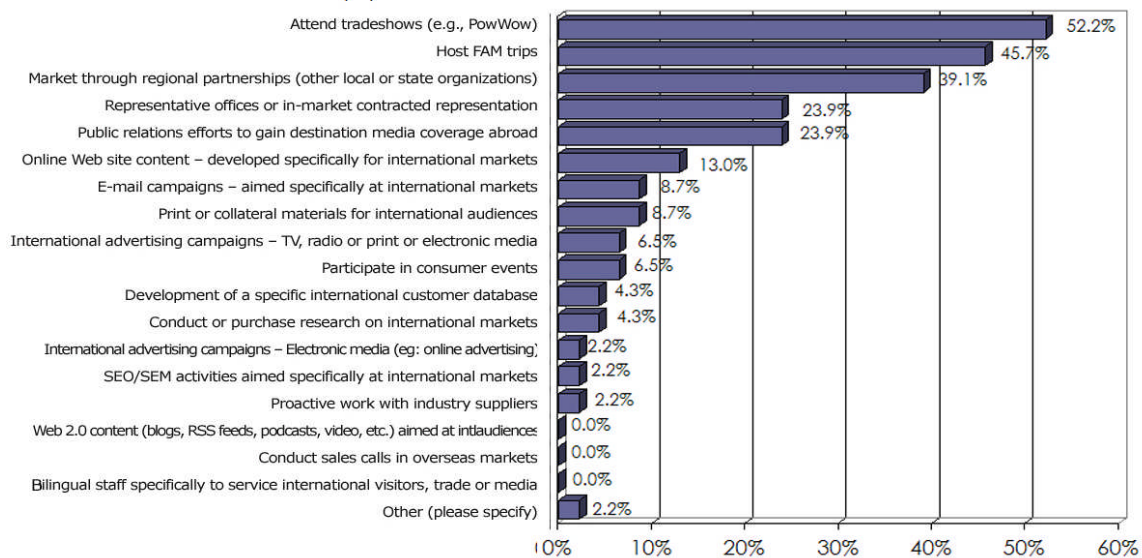


TECHNICAL NOTE: Question 16 - Which of the following activities does your organization use to promote your destination to international markets? (Select all that apply.) Base: All respondents. 47 completed surveys.

Most Important International Promotions

The three most utilized international marketing activities are also considered the most important (in terms of budget allocation) amongst the surveyed CVBs.

Figure 4.8: In terms of budget allocated to each, please indicate which of the following international marketing activities you consider the most important? (Select at most the three (3) most important.)

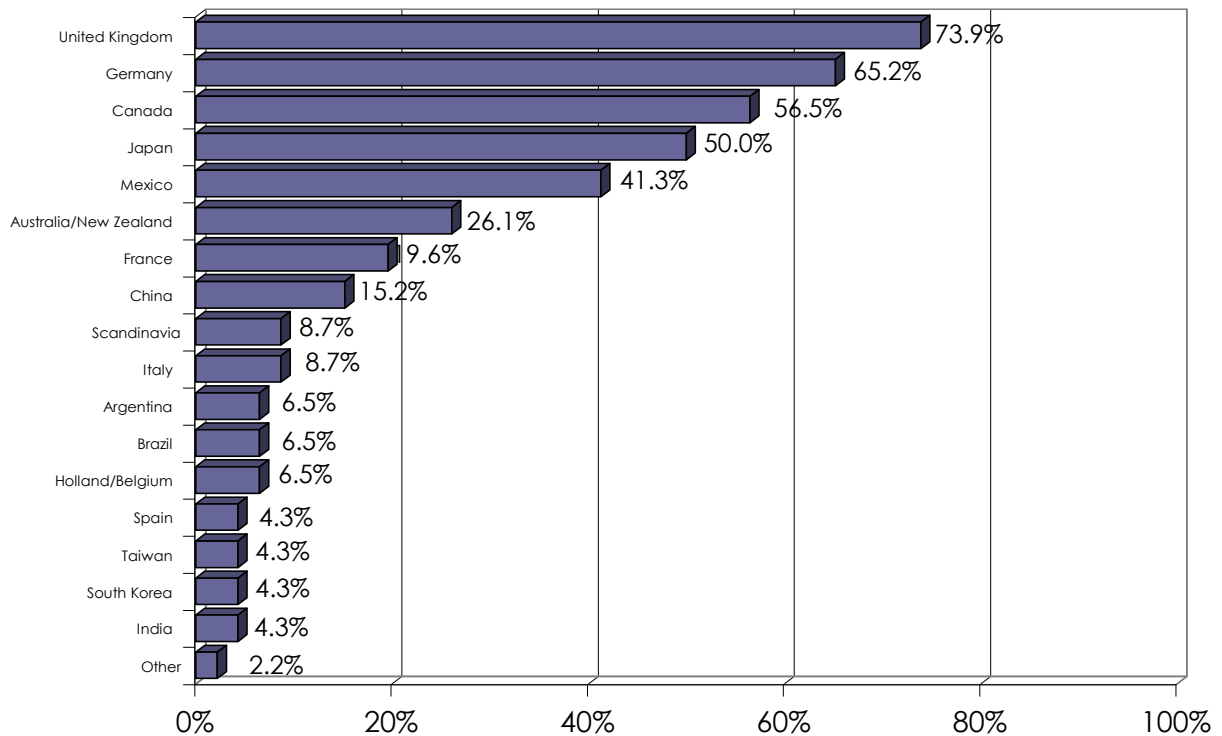


TECHNICAL NOTE: Question 17 - In terms of budget allocated to each, please indicate which of the following international marketing activities you consider the most important? (Select at most the three (3) most important.) Base: All respondents. 47 completed surveys.

Primary International Markets

The survey asked what countries respondents consider to be their destinations' primary international markets. Western CVBs appear to share the United Kingdom as a top international market, with 73.9 percent of those surveyed selecting that nation as (one of) its primary foreign markets. Another European country, Germany, received the second highest percentage of CVBs stating they consider it a primary international market (65.2%). North American neighbors Canada and Mexico are considered top markets by 56.5 percent and 41.3 percent respectively. Japan is a primary market for exactly half. A host of other countries are also considered top markets for a variety of CVBs, as demonstrated in the chart below.

Figure 4.9 - Which of the following do you consider to be the primary international markets for your destination? (Select all that apply.)

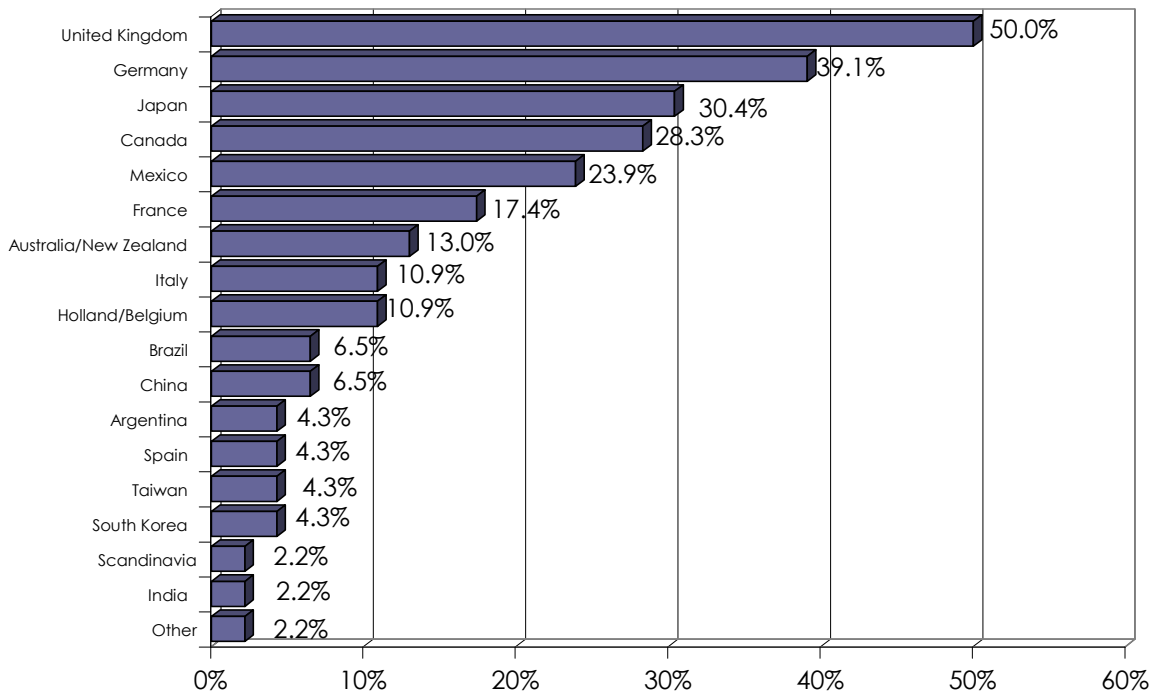


TECHNICAL NOTE: Question 18 - Which of the following do you consider to be the primary international markets for your destination? (Select all that apply.) Base: All respondents. 47 completed surveys.

Promotion in International Markets

It appears that not all CVBs are actively promoting to their top foreign markets. For example, although 73.9 percent of CVBs surveyed consider the UK a top international market, only 50.0 percent are regularly engaging in promoting their destination to the British travel market. There is a similar trend for most other foreign markets.

Figure 4.10 - To which of the following international markets does your destination actively promote itself? (Select all that apply.)

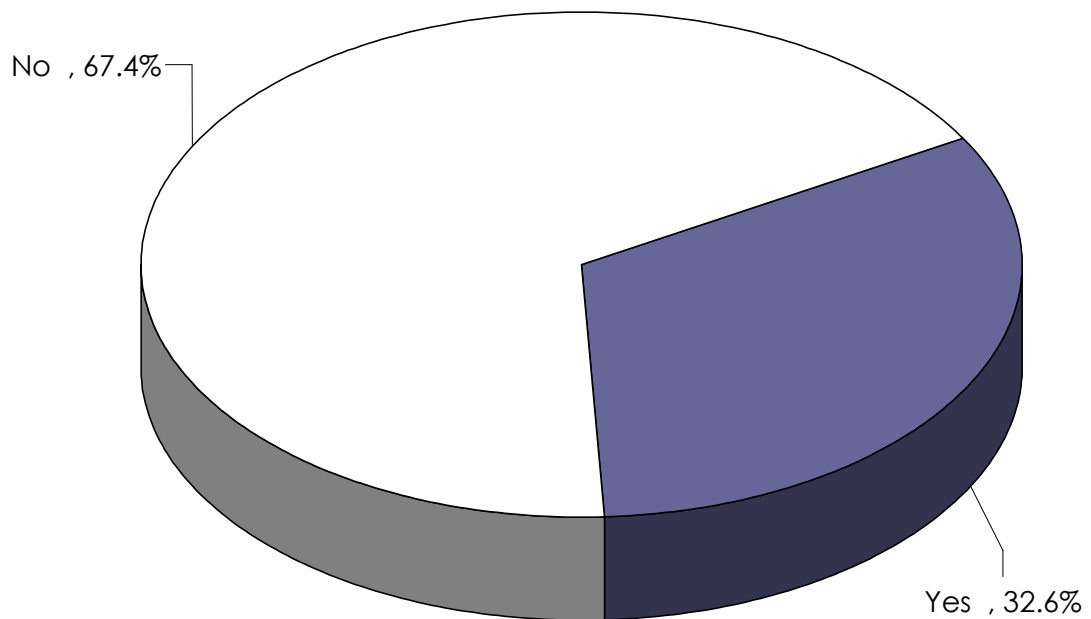


TECHNICAL NOTE: Question 19 - To which of the following international markets does your destination actively promote itself? (Select all that apply.) Base: All respondents. 47 completed surveys.

Foreign Language Content on Web Site

Despite the majority of CVB respondents attributing some importance to international markets (page 22), only 32.6 percent of surveyed CVBs offer non-English language content on their Web site. This is similar to the percentage that has a formal international marketing strategy in place (37.0%, page 21).

Figure 4.11 - Do you provide non-English language content on your Web site?

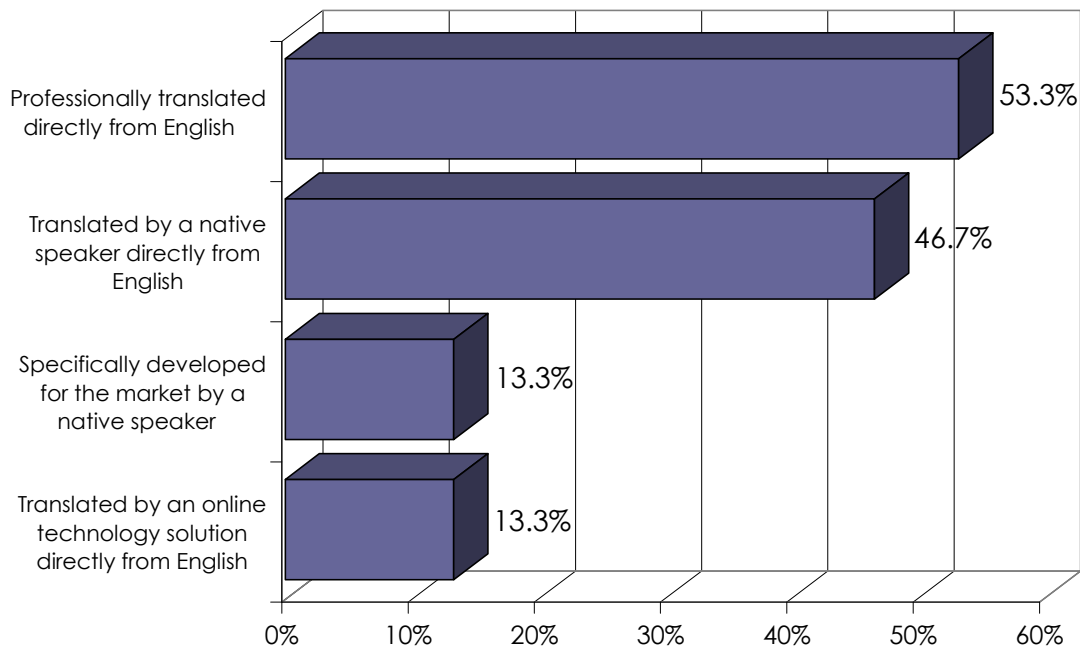


TECHNICAL NOTE: Question 20 - Do you provide non-English language content on your Web site?
Base: All respondents. 47 completed surveys.

How Foreign Language Content Was Developed

Those CVBs who provide non-English content on their Web site were asked how they developed this content. The majority of these CVBs used their English content and had it translated. Just over half (53.3%) of these CVBs had their English language content professionally translated. Another 46.7 percent had a native speaker translate their English content, while 13.3 percent used an online solution. Only 13.3 percent had content specifically developed for the market by a native speaker.

Figure 4.12 - If you have non-English language content on your Web site, how was this content developed? (Select all that apply.)



TECHNICAL NOTE: Question 21 - If you have non-English language content on your Web site, how was this content developed? (Select all that apply.) Base: Respondents who have non-English language content on their Web site. 15 completed surveys.

Index I: Survey Questionnaire

As reference, the survey questionnaire that respondents completed follows.

WACVB 2007 Marketing Survey

1) In the past two (2) years, has your organization conducted (or commissioned) any Web site user surveys to better understand your Web site users' needs and interests?

- Yes
- No
- I don't know

2) Was this research used to help shape the design or content of your Web site?

- Yes
- No
- I don't know

3) In your opinion, how important was this research in shaping or developing your Web site?

- Very important
- Important
- Of some importance
- Of little importance
- Of no importance

4) In the past two (2) years, has your organization conducted any research to measure the Return on Investment (ROI) to your community of the following? (Select all that apply.)

- Your Web site
- E-mail promotions
- Advertising campaigns
- Other marketing programs
- Other (please specify)

If you selected other, please specify:

5) In the past two (2) years, has your organization conducted (or commissioned) a Web site usability study of your Web site?

- Yes
- No
- I don't know

6) Was this usability research used to help shape the design or content of your Web site?

- Yes
- No
- I don't know

7) In your opinion, how important was this usability research in shaping or developing your Web site?

- Very important
- Important
- Of some importance
- Of little importance
- Of no importance

8) Which of the following Web statistics and measurement tool(s) are you (or your Web vendor) currently using on your Web site? (Please select all that apply.)

- Clicktracks
- Google Analytics/Urchin
- Omniture
- Opentracker
- Visitour
- VisitorVille
- Webtrends
- WebStats
- WebSideStory/HBX/Visual Sciences
- Zorble
- Not sure of the program

Other (please specify)

If you selected other, please specify:

9) Which best describes who mainly uses Web statistics in your organization? (Select one.)

- Web statistics are primarily used by our marketing or technical staff or Web vendor. Senior managers review and discuss this information occasionally (i.e., every few months or so).
- Web statistics are reviewed and discussed by our senior managers regularly (i.e., usually on a monthly basis).
- Web statistics are reviewed and discussed by our senior managers frequently (i.e., typically every week or two).

10) How have you used Web statistics in the last year? (Please select all that apply.)

- To measure general trends in online activity (e.g., user sessions/unique visitors, time on site, top pages, etc.).
- To specifically measure our progress against predefined online marketing objectives for the month, quarter or year.
- To measure the response and success of online marketing campaigns and programs (e.g., the click-through traffic and visitor guide orders, etc. from online advertising).
- To measure the response and success of both online AND offline marketing campaigns and programs (e.g., to measure the traffic and visitor guide orders, etc. of consumers from a defined market in which you have recently advertised).
- To collect information and feedback for occasional improvements to the Web site or e-mail marketing campaign.
- To measure and assess the immediate impact of regular changes or enhancements to the Web site.
- To measure general trends from an e-mail program including opening rates and click-through rates.
- To do more advanced measurement of an e-mail program including reviewing opening rates by types of content and user/consumer segment.
- Other (please specify)

If you selected other, please specify:

11) Does your organization have a formal international marketing strategy in place?

- Yes
- No
- I don't know

12) How important is international visitation to your destination?

- Extremely important
- Important
- Of some importance
- Of little importance
- Of no importance
- I don't know

13) Do you believe the importance of international markets to your destination is adequately addressed in your organization's marketing plans and budget?

- Yes
- No
- I don't know

14) What is your organization's current total annual marketing budget? (Please exclude staff salaries.)

\$ Total annual marketing budget (excluding salaries)

15) Approximately what percentage of your organization's annual marketing budget (excluding salaries) is specifically allocated to the following? (Indicate an approximate percent below.)

International marketing

Market research including web analytics

16) Which of the following activities does your organization use to promote your destination to international markets? (Select all that apply.)

- Attend tradeshow (e.g., PowWow)
- Host FAM trips
- International advertising campaigns – television, radio or print
- International advertising campaigns – electronic media
- Participate in consumer events
- Online Web site content developed specifically for international markets
- Web 2.0 content (blogs, RSS feeds, podcasts, video, etc.) aimed specifically at international audiences
- SEO/SEM activities aimed specifically at international markets
- E-mail campaigns – aimed specifically at international markets
- Representative offices or in-market contracted representation
- Proactive work with industry suppliers
- Conduct sales calls in overseas markets
- Market through regional partnerships (other local or state organizations)
- Public relations efforts to gain destination media coverage abroad
- Development of a specific international customer database
- Conduct or purchase research on international markets
- Print or collateral materials for international audiences
- Hiring of bilingual staff specifically to service international visitors, trade or media
- Other (please specify)

If you selected other, please specify:

17) In terms of budget allocated to each, please indicate which of the following international marketing activities you consider the most important? **(Select at most the three (3) most important.)**

- Attend tradeshow (e.g., PowWow)
- Host FAM trips
- International advertising campaigns – TV, radio or print or electronic media
- International advertising campaigns – Electronic media (eg: online advertising)
- Participate in consumer events

- Online Web site content – developed specifically for international markets
- Web 2.0 content (blogs, RSS feeds, podcasts, video, etc.) aimed specifically at international audiences
- SEO/SEM activities aimed specifically at international markets
- E-mail campaigns – aimed specifically at international markets
- Representative offices or in-market contracted representation
- Proactive work with industry suppliers
- Conduct sales calls in overseas markets
- Market through regional partnerships (other local or state organizations)
- Public relations efforts to gain destination media coverage abroad
- Development of a specific international customer database
- Conduct or purchase research on international markets
- Print or collateral materials for international audiences
- Hiring of bilingual staff specifically to service international visitors, trade or media
- Other (please specify)

If you selected other, please specify:

18) Which of the following do you consider to be the **primary international markets** for your destination? (Select all that apply.)

- United Kingdom
- Japan
- Australia/New Zealand
- China
- India
- South Korea
- Taiwan
- Germany
- Canada
- France
- Holland/Belgium
- Italy

- Spain
- Scandinavia (Denmark, Finland, Norway, Sweden)
- Mexico
- Brazil
- Argentina
- Other (please specify)

If you selected other, please specify:

19) To which of the following international markets does your destination **actively promote itself**? (Select all that apply.)

- United Kingdom
- Japan
- Australia/New Zealand
- China
- India
- South Korea
- Taiwan
- Germany
- Canada
- France
- Holland/Belgium
- Italy
- Spain
- Scandinavia (Denmark, Finland, Norway, Sweden)
- Mexico
- Brazil
- Argentina
- Other (please specify)

If you selected other, please specify:

20) Do you provide non-English language content on your Web site?

- Yes
- No
- I don't know

21) If you have non-English language content on your Web site, how was this content developed? (Select all that apply.)

- It was professionally translated directly from the English version
- It was translated by an online technology solution directly from the English version
- It was translated by a native speaker directly from the English version
- It was specifically developed for the market and written by a native speaker

22) Please share your name and organization:

Name:

Organization: