

A woman with curly hair is looking at her smartphone. The background is blurred, suggesting an outdoor setting. The text is overlaid on the image.

DESTINATION MOBILE READINESS INDEX

GLOBAL DMO MOBILE READINESS: WEB & APPS
2016 Edition & 2014-2016 Trends

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EXECUTIVE SUMMARY

The Global DMO Mobile Readiness Index is the world's most comprehensive analysis of the mobile readiness of Destination Marketing Organizations (DMOs) globally.

The study is undertaken by the Ted Rogers School of Management at Ryerson University in Toronto, Canada and is sponsored by Miles. Using a list of 231 DMOs, we used desktop computers, smartphones and website emulators to identify their mobile readiness (see pages 11 & 12 for the methodology and the 231 DMOs reviewed). In this second year of our report the results indicate a shift in the mobile ready practices of DMOs.

Global DMO Mobile Readiness

Executive Summary

Highlights of the research include:

- **Responsive Website Increase.** From 2014 to 2016 an additional 92 DMO websites became responsive representing 77% of DMOs in 2016.
- **Mobile Website Dis-adoption.** Overall there has been a 29% reduction in the use of mobile websites from 2014 (n=97) to 2016 (n=30).
- **Stalled Use of Mobile Applications.** Growth in the use of mobile applications by DMOs is limited. In 2014 74 DMO's had a mobile application and by 2016 there were only 77. Many DMOs discontinued mobile applications from 2014 to 2016.

About the Global DMO Mobile Readiness Index: This index was developed by Dr. Chris Gibbs of the Ted Rogers Institute for Hospitality and Tourism Management, Ryerson University, Toronto, Canada with the support and input of Chris Adams, Head of Research & Insights of Miles – the commercial sponsor of the project. For more on the methodology, sample & project – see pages 11-13

DMO Mobile Readiness

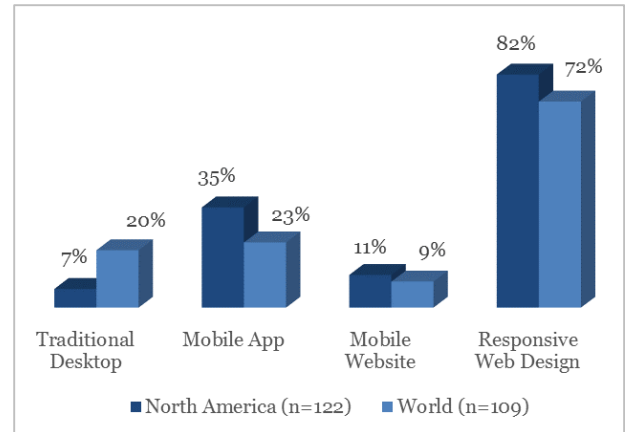
US & Australian DMOs Lead Mobile Readiness

In the race towards servicing the mobile enabled traveller, Larger US (State & major CVB) destinations plus Australian DMOs are outpacing DMOs from other regions of the world. Of these DMOs for example, close to, or fully 100% of Destinations have a Responsive website as of August 2016.

Responsive web design has clearly become the dominant platform against mobile websites with more than 77% of DMO organizations now having a responsive site compared to 40% in 2014. However, growth in the adoption of Mobile Applications (Apps) largely stalled.

Global DMO Mobile Readiness

Since 2015, the number of DMOs who have cancelled or no longer make their mobile app available almost matched the number of new DMOs offering Mobile Apps. Based on market trends related to mobile apps (see page 7) we expect more DMO organizations to reconsider investment in mobile applications.



Mobile App or no Mobile App

While there has been explosive growth in the implementation of responsive websites from 2014 to 2016, the growth of mobile applications has not occurred. We are in fact seeing the elimination of mobile apps by many destinations during this time period.

Some factors that may be affecting the decreased usage of mobile apps by destinations includes:

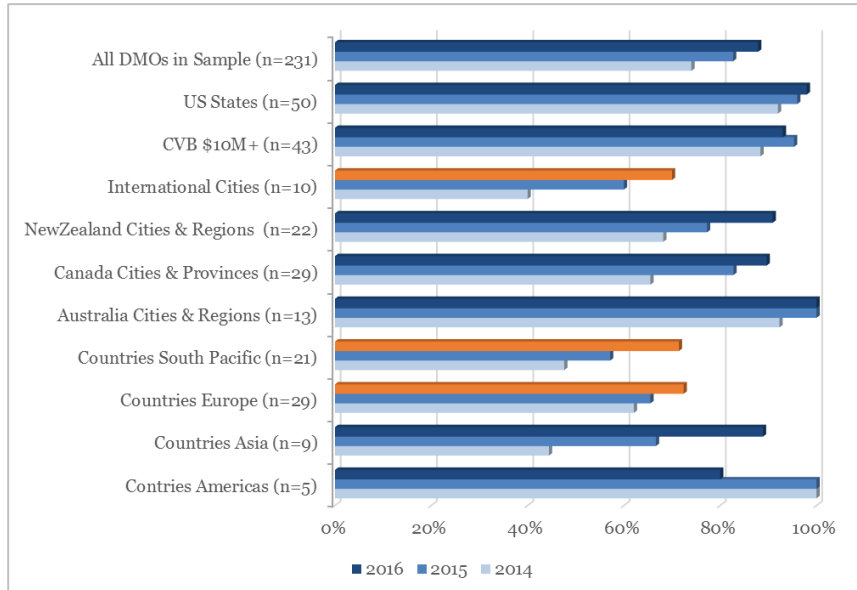
- App downloads have declined more than 20% from 2015 to 2016. ¹
- The average American smartphone user downloads zero apps per month...Most people have the apps they want and/or need. ²
- Apps have a high barrier to entry for consumers and require significant investment by users; download app, login to app, and then learn how to use it. ³



1. [Downloads may be dipping, but that doesn't mean the app business is dying; Mashable 2016.](#)
2. [The App boom is over; Recode, 2016.](#)
3. [TripAdvisor advises against mobile apps for its hotel customers; Skift 2013](#)

Mobile Ready 2014 to 2016 Comparison

“Mobile Ready” refers to DMOs who have a Responsive Website and/or a separate Mobile website for users wishing to visit their website on a Mobile device. From the sample of 231 destinations, 88% are Mobile Ready in 2016 versus only 74% who were Mobile Ready in 2014.



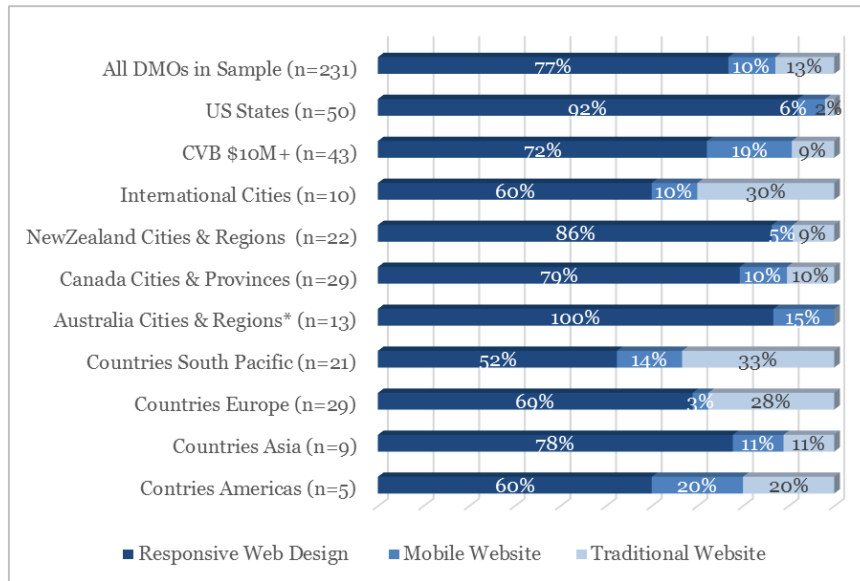
HIGHLIGHTS

Only 26 DMOs out of the 231 Destinations surveyed are not mobile ready. Regions that require the greatest improvement are:

- International Cities 70%
- Countries South Pacific 71%
- Countries Europe 72%

Website Solutions Summary

Overall in 2016, 77% of DMO websites use Responsive Web Design, 10% use a mobile websites and 13% have a traditional website that is not mobile ready.



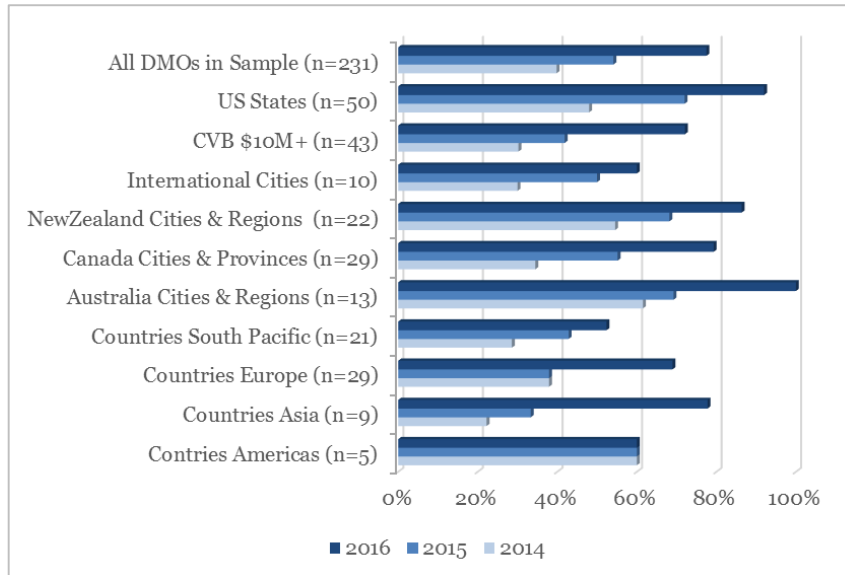
HIGHLIGHTS

Responsive websites have become the dominant form of mobile readiness with 179 DMO's in the sample set.

Responsive Web Design

2014 to 2016 Comparison

From 2014 to 2016 an additional 92 DMO websites became responsive representing a total of 77% of DMO websites as of Q3 2016.



HIGHLIGHTS

The top movers between 2015 and 2016 of Destinations upgrading their website to a Responsive design were US States, major City CVBs and Canadian Destinations:

US States (+22)

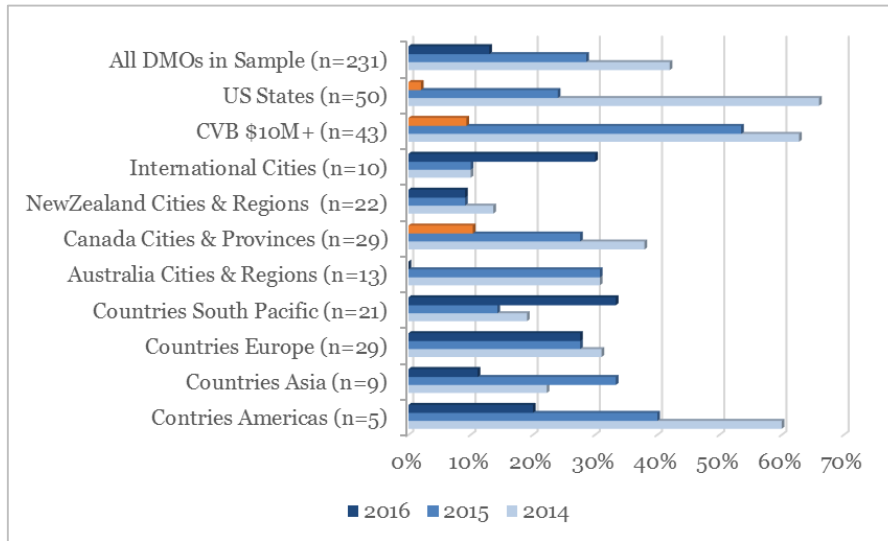
CVB \$10M+ (+18)

Canada (+13)

Mobile Websites

2014 to 2016 Comparison

Once websites become Responsive the need for a separate, mobile website largely disappears. Overall **there has been** a 29% reduction in the use of separate mobile websites from 2015 to 2016:



HIGHLIGHTS

Greatest reduction in the use of mobile websites occurred with

US States (-32)

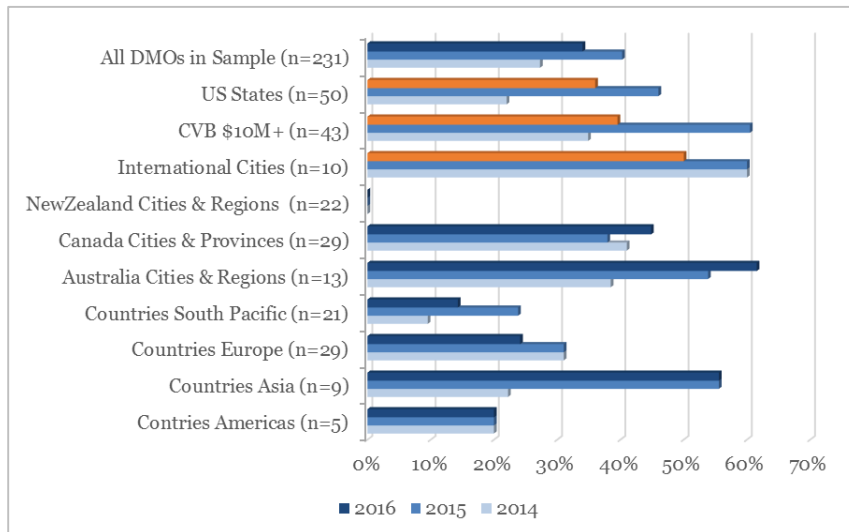
CVB \$10M+ (-23)

Canada (-8)

The primary driver of the reduction was the implementation of a responsive website.

Mobile Applications 2014 to 2016

Growth in the use of mobile applications by DMOs has stalled. In 2014 74 DMO's had a mobile application and by 2016 there were only 77. Many DMOs discontinued mobile applications from 2014 to 2016. Amongst regions of the world, Australia and New Zealand stand out for DMOs both investing and not investing respectively in Apps – highlighting sharply different approaches from these South Pacific neighbors.



HIGHLIGHTS

A reduction in the use of mobile apps is being driven by large city based DMO's.

US States (-9)

CVB \$10M+ (-11)

International

Cities (-6)

Methodology:

Using a sampling of different DMOs around the world, we used both a mobile phone and desktop computer to identify whether the DMO had a mobile-friendly website

Step 1 Google Search. The full name of the DMO was entered into a Google search on a smartphone. The official website for the DMO was identified and Google either indicated it as either "Mobile-friendly" or not.

Tourism Toronto

www.seetorontonow.com

Mobile-friendly > A guide to what's happening in the city, including events, festivals, sports, theatre and seasonal activities.

You visited this page on 12/05/15.

Step 2 Website Review "Mobile-friendly". For sites that Google classified as mobile-friendly, both a mobile phone and desktop computer were used to identify whether the website used responsive web design or was a separate website specifically designed for mobile phones. Mobile website usually have a similar URL, however have indicators like .m, .mob or .mobile within the address.

Step 3 Website Review Not mobile friendly. For websites that did not indicate mobile friendly, the home page of the DMO was visited using a desktop computer to search for evidence of a mobile website.

Methodology Mobile Applications

Using the same list of DMOs from the website analysis, we searched for the presence of official DMO mobile applications.

Step 1 Website Search. The official website for the DMO was visited. Searches for the presence of mobile applications on the home page and through the search bar was conducted. If there was reference to an application, the type of app was recorded.



Step 2 Application Stores. Using a desktop computer the name of the DMO and the name of the destination were entered into the search bars of the Apple and Google Play stores. Apps appearing from the search were reviewed and only apps which were the official apps for the DMO were recorded. For large popular destinations like New York City and Paris, many different commercial apps were available. Only those identified as the official apps of the destination were recorded.

Global DMO Sample

- **US States** (*n*=50) Alabama, Alaska, Arizona, Arkansas, California, Colorado, Connecticut, Delaware, Florida, Georgia, Hawaii, Idaho, Illinois, Indiana, Iowa, Kansas, Kentucky, Louisiana, Maine, Maryland, Massachusetts, Michigan, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Hampshire, New Jersey, New Mexico, New York, North Carolina, North Dakota, Ohio, Oklahoma, Oregon, Pennsylvania, Rhode Island, South Carolina, South Dakota, Tennessee, Texas, Utah, Vermont, Virginia, Washington, West Virginia, Wisconsin & Wyoming.
 - **CVB \$10M+** (*n*=43) Anaheim/Orange County, Atlanta, Atlantic City, Austin, Baltimore, Boston, British Columbia¹, Charlotte, Chicago, Columbus, Dallas, Denver, Detroit, Fort Myers, Gold Coast¹, Houston, Indianapolis, Kissimmee, Las Vegas, Los Angeles, Louisville, Miami, Montreal¹, Myrtle Beach, Nassau, New Orleans, New York City, Orlando, Panama City Beach, Philadelphia, Phoenix, Pittsburgh, Portland, San Antonio, San Diego, San Francisco, Scottsdale, St. Louis, St. Petersburg, Toronto¹, Virginia Beach, Wisconsin Dells/Lake Delton & Whistler.
 - **International Cities** (*n*=10) Barcelona, Berlin, Brussels, Dubai, Florence, Istanbul, London, Milan, Paris & Rome.
 - **New Zealand Cities & Regions** (*n*=22) Auckland, Bay of Plenty, Central Otago, Christchurch, Coromandel Peninsula, Dunedin, Fiordland, Hamilton, Waikato, Hawkes Bay, Lake Taupo, Lake Wanaka, Marlborough, Mount Cook National Park, Northland, Queenstown, Regional Tourism Information², Rotorua, Southland, Taranaki, Wairarapa, Wellington & West Coast.
 - **Canada Cities & Provinces** (*n*=29) Alberta, Banff, British Columbia, Calgary, Charlottetown, Edmonton, Fredericton, Halifax, Hamilton, Jasper, Manitoba, Montreal, New Brunswick, Newfoundland and Labrador, Niagara Falls, Nova Scotia, Ontario, Ottawa, Prince Edward Island, Quebec, Quebec City, Regina, Saskatchewan, Saskatoon, St. Johns, Toronto, Vancouver, Victoria, & Winnipeg.
 - **Australia Cities & Regions** (*n*=14) Adelaide, Brisbane, Canberra, Gold Coast, Melbourne, New South Wales, Northern Territory, Perth, Queensland, South Australia, Sydney, Tasmania, Victoria, & Western Australia.
 - **Countries South Pacific** (*n*=21) American Samoa, Australia, Cook Islands, Fiji, Guam, Kiribati, Marshall Islands, Micronesia, Federated States of Nauru, New Caledonia, New Zealand, Niue, Northern Mariana Islands, Palau, Papua New Guinea, Samoa, Solomon Islands, Tahiti, Tonga, Tuvalu & Vanuatu.
 - **Countries Europe** (*n*=29) Belarus, Bulgaria, Czech Republic, Hungary, Poland, Romania, Russia, Slovakia, Moldova, Ukraine, Denmark, Estonia, Faroe Islands, Finland, Guernsey, Belgium, Croatia, France, Germany, Greece, Iceland, Ireland, Italy, Norway, Portugal, Spain, Sweden, Turkey & United Kingdom.
 - **Countries Asia** (*n*=9) Asia Tourism Regional Site², China, Hong Kong, Japan, Korea (South), Korea (North), Malaysia, Philippines, Singapore, Thailand.
 - **Countries America** (*n*=5) Argentina, Brazil, Canada, Mexico & United States.
1. CVB \$10M – Four of the DMO's listed in the Convention and Visitor Bureaus with budgets of more than \$10 million were also listed in their respective country indexes.

MORE INFORMATION

This report was prepared by Dr. Chris Gibbs from the Ted Rogers School for Hospitality and Tourism's Management at Ryerson University in Toronto with support from Chris Adams, Head of Research & Insights at Miles. Dr. Gibbs specializes in digital shift research whereby changes in technology affect business operations. His research is hospitality and tourism industry focused and designed to provide business leaders with the insight to plan and predict future shifts in technology. For more information, feel free to contact Dr. Gibbs.

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