



# Destination Mobile Readiness

GLOBAL MOBILE READINESS INDEX

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# Global DMO Mobile Readiness

## Executive Summary

The purpose of this report is to review the mobile readiness for Destination Marketing Organizations (DMOs) from a global perspective. This is second year of our report and the results indicate a shift in the mobile ready practices of DMOs. Using a list of 231 DMOS, we used desktop computers, smartphones and website emulators to identify mobile optimization strategies used.

Highlights of the research include:

- ❑ **Responsive Website Increase.** Overall there has been a 36% increase in the use of a responsive website. The increase was particularly high with DMOs in the US, International Cities and Canada – with US States the fastest movers.
- ❑ **Mobile Website Dis-adoption.** While DMOs are increasingly launching responsive sites, they are cancelling their mobile websites (-32% .m, .mob, etc.) and re-directing to the new responsive websites.
- ❑ **Mobile Applications.** An increase in the presence of mobile applications (+30%) occurred, however there is some early evidence of DMOs moving away from general apps to specialist app purposes, topics or types.

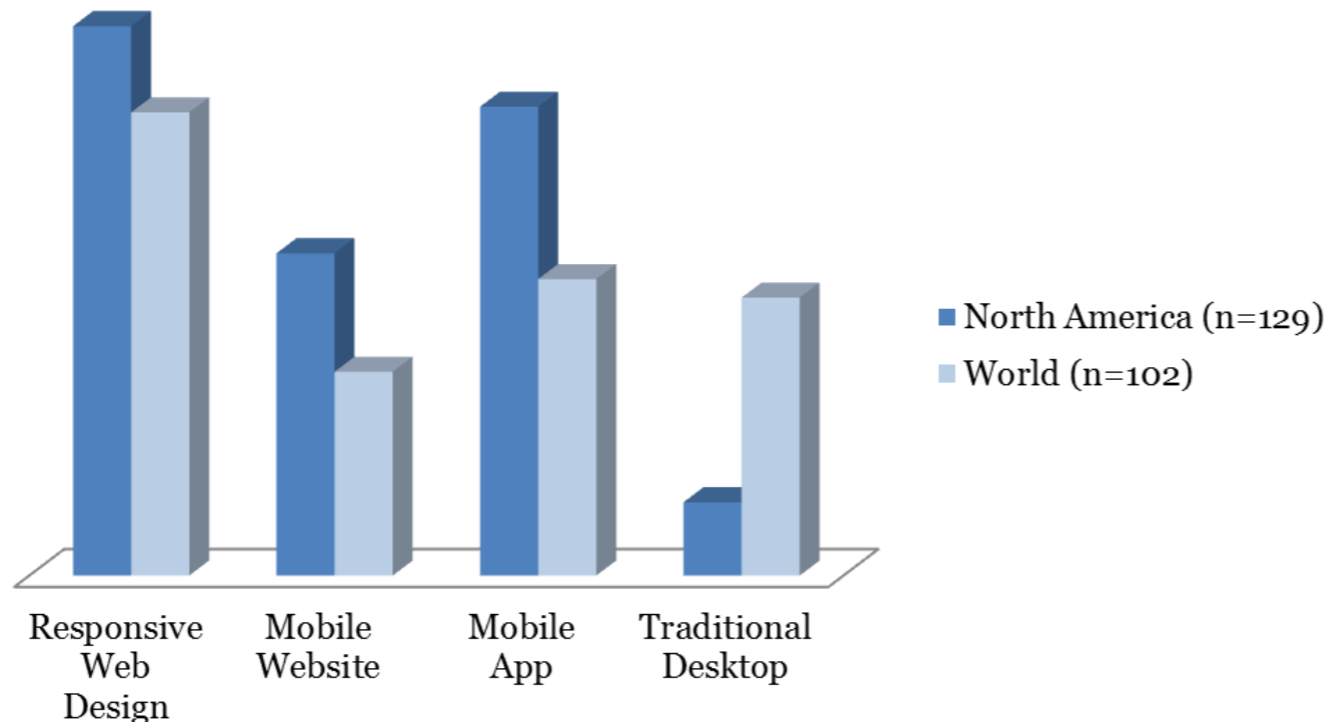
About the Global Mobile Readiness Index. This index was developed by Dr. Chris Gibbs of the Ted Rogers Institute for Hospitality and Tourism Management at Ryerson University, Toronto, Canada in collaboration with Chris Adams, Director of Research and Online Marketing at Miles – the commercial sponsor of the project.



## North American DMO's Dominate Mobile Readiness

In the race towards servicing the mobile enabled traveller, North America based organizations are consistently outpacing organizations from other regions of the world. Responsive web design has clearly become the dominant platform against mobile websites with more than 54% of DMO organizations now having a responsive site compared to 40% in July 2014.

For 2016, you can expect continued growth in responsive to continue as regions around the world and city based DMOs in North America develop responsive websites.





# The Shift to Mobile - Need to do for DMO's

## UPDATE FOR DMO'S

The use of mobile devices for travel shopping continues to increase. Below are some recent research results which support the need for DMOs to shift to mobile-friendly websites.

- ❑ 61% of leisure travelers encountered a mobile site that wasn't optimized and left the site.<sup>2</sup>
- ❑ 67% of leisure travelers and 78% of business travellers use smartphones throughout the travel shopping journey<sup>3</sup>
- ❑ Millennials aged 18-34 have the highest smartphone penetration 90%+.<sup>4</sup>
- ❑ 37% of US digital travel sales will come from a mobile device by 2018.<sup>5</sup>
- ❑ Interviews with travel executives point to increased usage of mobile; TripAdvisor 50% of traffic is from mobile and China's Qunar 40% of revenue from mobile.<sup>6</sup>

<sup>1</sup>"Google gives mobile-friendly sites a boost in search ranking", Business Daily News 2015.

<sup>2</sup>"The 2014 Traveler's Road to Decision:, Think with Google ', Jun 2014.

<sup>3</sup>"Travel bookings by mobile on the rise in share and value", Tnooz, Sep 2014.

<sup>4</sup> The Global Mobile Report, comScore July 14, 2015

<sup>5</sup>"US Travel Sales, by Channel 2012-13", eMarketer, Apr 2014.

<sup>6</sup>"The state of mobile booking 2015" Skift 2014.

**#Mobilegeddon**

**April 21  
2015**

Google updated their algorithms to favor mobile-friendly websites making them appear higher in search rankings.<sup>1</sup>



# #Mobilegeddon After Effect

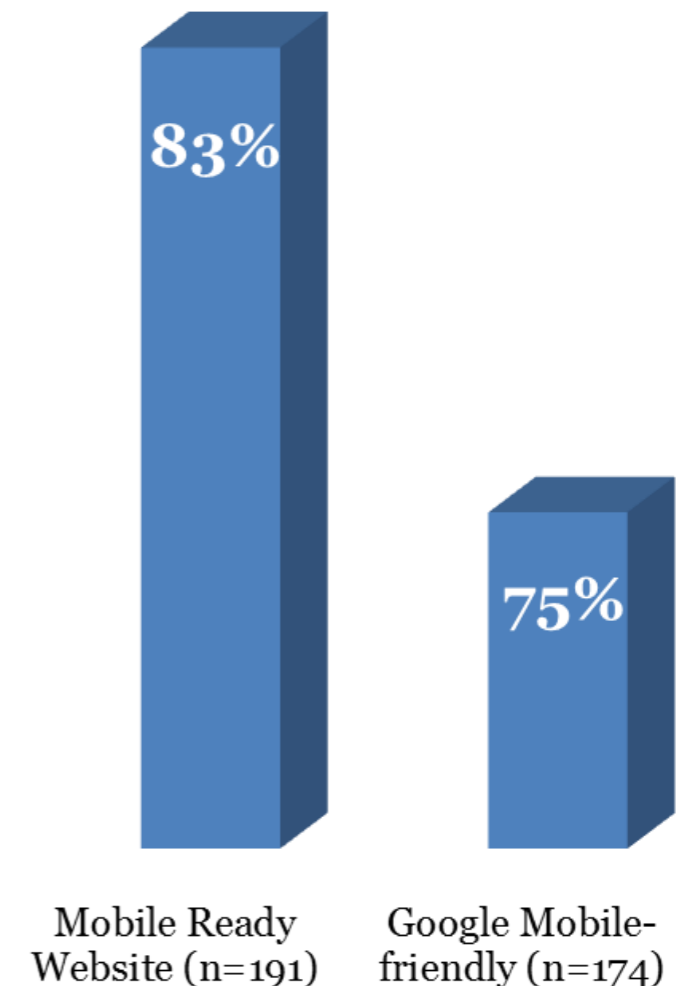
On April 21, 2015, Google updated their algorithms to favor mobile-friendly websites making them appear higher in search rankings (#Mobilegeddon). When testing DMO websites which had either a mobile website or responsive website with the Google Mobile-friendly test, not all websites pass.

Almost 10% of DMOs who have a mobile ready website solution in place do not pass Google's "Mobile-friendly" test. The issue could be a simple programming change or alteration in content on the website. Either way, the DMO has the intention to be mobile-friendly, but their website is not performing up to Google standards.

Websites from Europe, Asia and CVBs with budgets greater than \$10M have almost 15% of their number not passing the Google Mobile-friendly test.

DMOs are encouraged to frequently check different URL's using the Google Mobile-Friendly test (see link below). This is especially important to be done after website changes have been made.

<https://www.google.ca/webmasters/tools/mobile-friendly/>

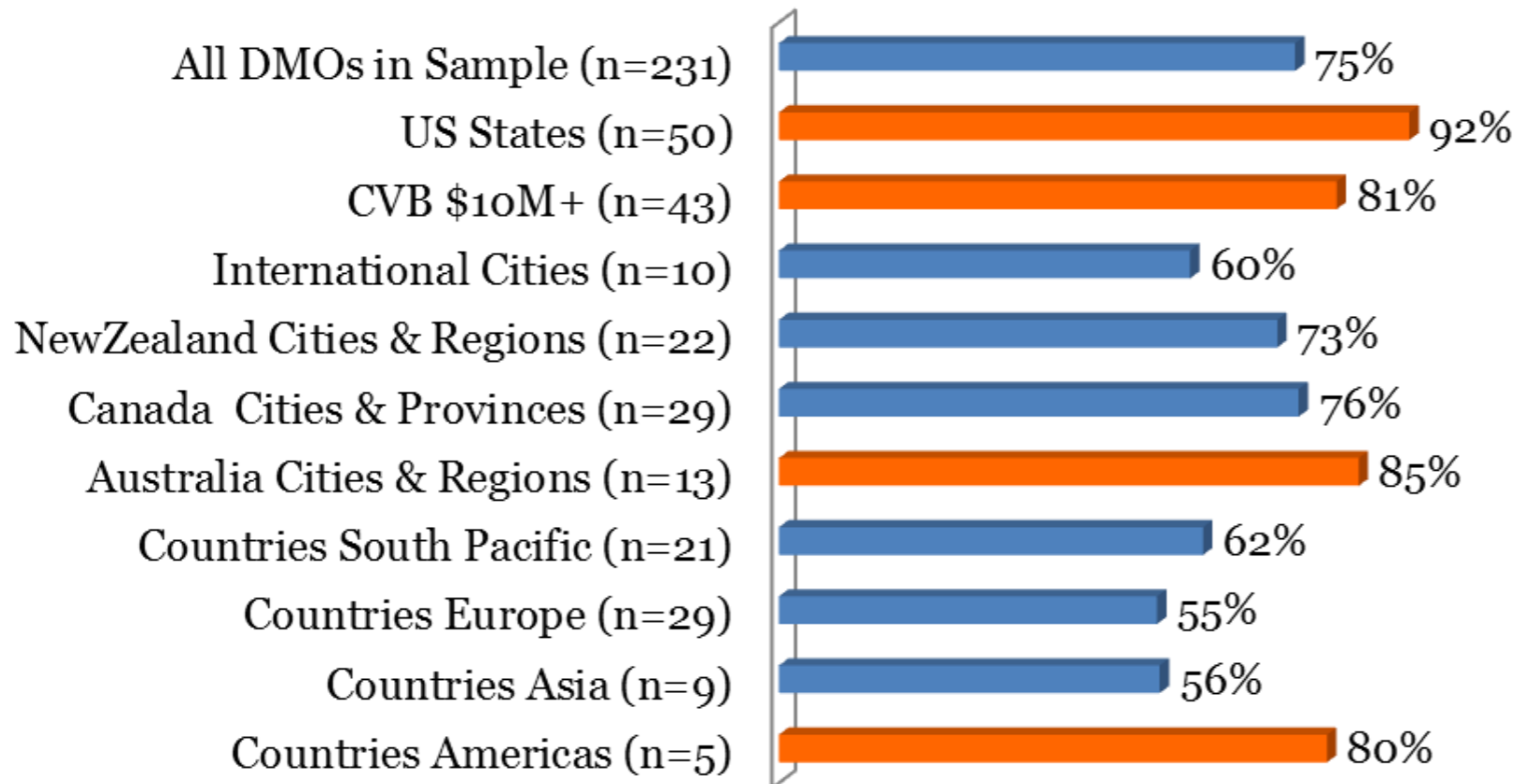




## Google Mobile-friendly Websites

From the sample of 231 websites 174 or 74% were Mobile-friendly according to Google. (note below) .

### Google "Mobile-friendly" Website



### Highlights

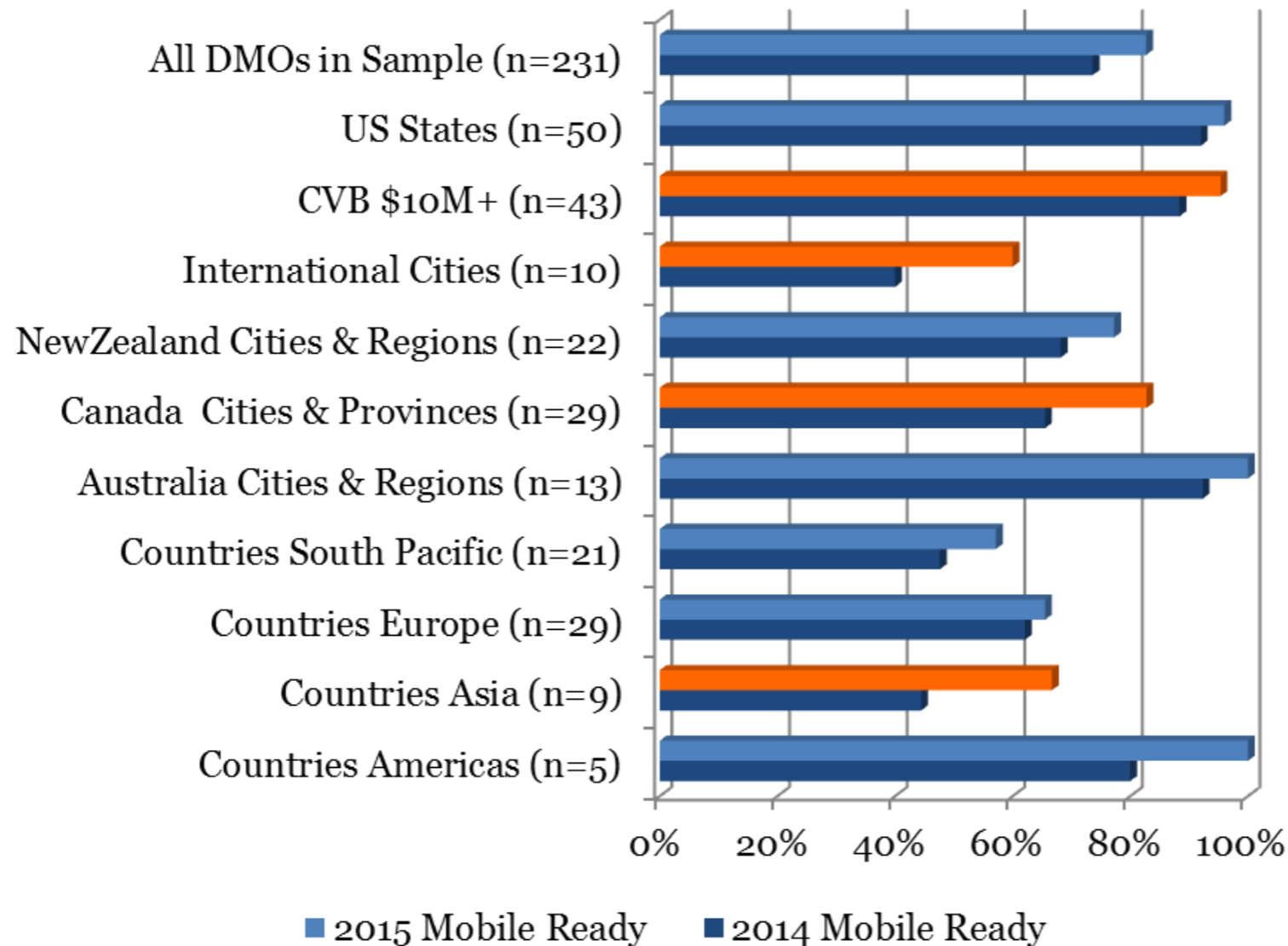
Leaders in Google Mobile-readiness include

- **US States** (92%)
- **Australia** (85%)
- **CVB \$10M+** (81%)
- **Americas** (80%)



## Mobile Ready 2014 to 2015 Comparison

From the sample of 231 websites in 2014, 74% were mobile ready whereas in 2015 83% were mobile ready.



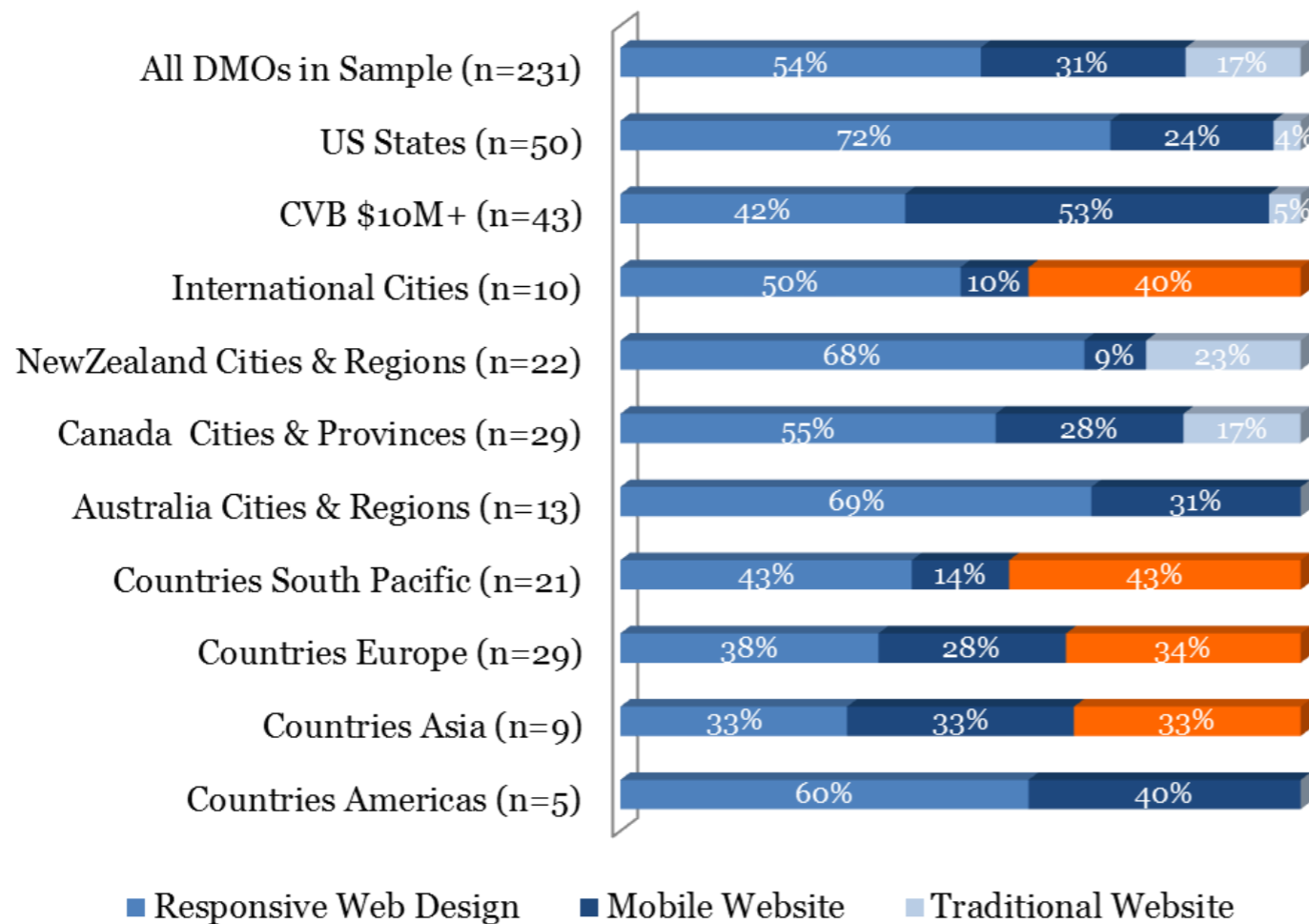
### Highlights 2014 to 2015

- 21 websites (9%) became mobile ready
- Biggest increase occurred with **Canada** (5) and **CVB \$10M+** (3).
- 50% increase in mobile ready sites for **Asia** and **International Cities**.



## Website Solutions Summary

Overall, 54% of websites use Responsive Web Design and 31% use a mobile websites and 17% have a traditional website that is not mobile ready.



### Highlights

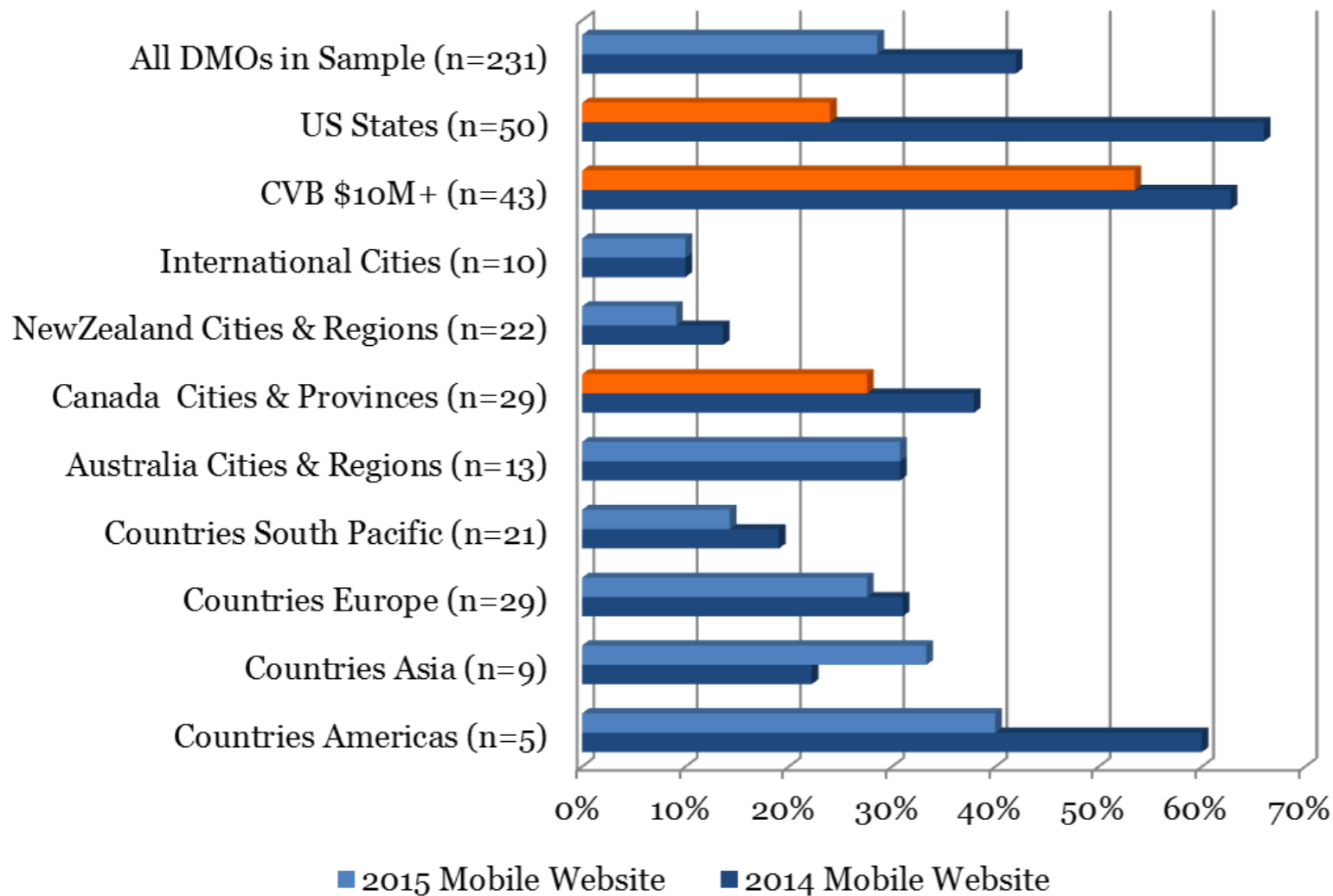
- Overall 49 (21%) of websites in 2014 were not mobile ready and in 2015 40 (17%) are not mobile friendly.
- Regions which are least mobile ready include **South Pacific, International Cities, Europe & Asia.**





## Mobile Websites 2014 to 2015 Comparison

Overall there has been a 32% reduction in the use of mobile websites from 2014 (n=97) to 2015 (n=33).



### Highlights 2014 to 2015

Greatest reduction in the use of mobile websites occurred with

**US States** (-21)

**Large CVB \$10M+** (-4)

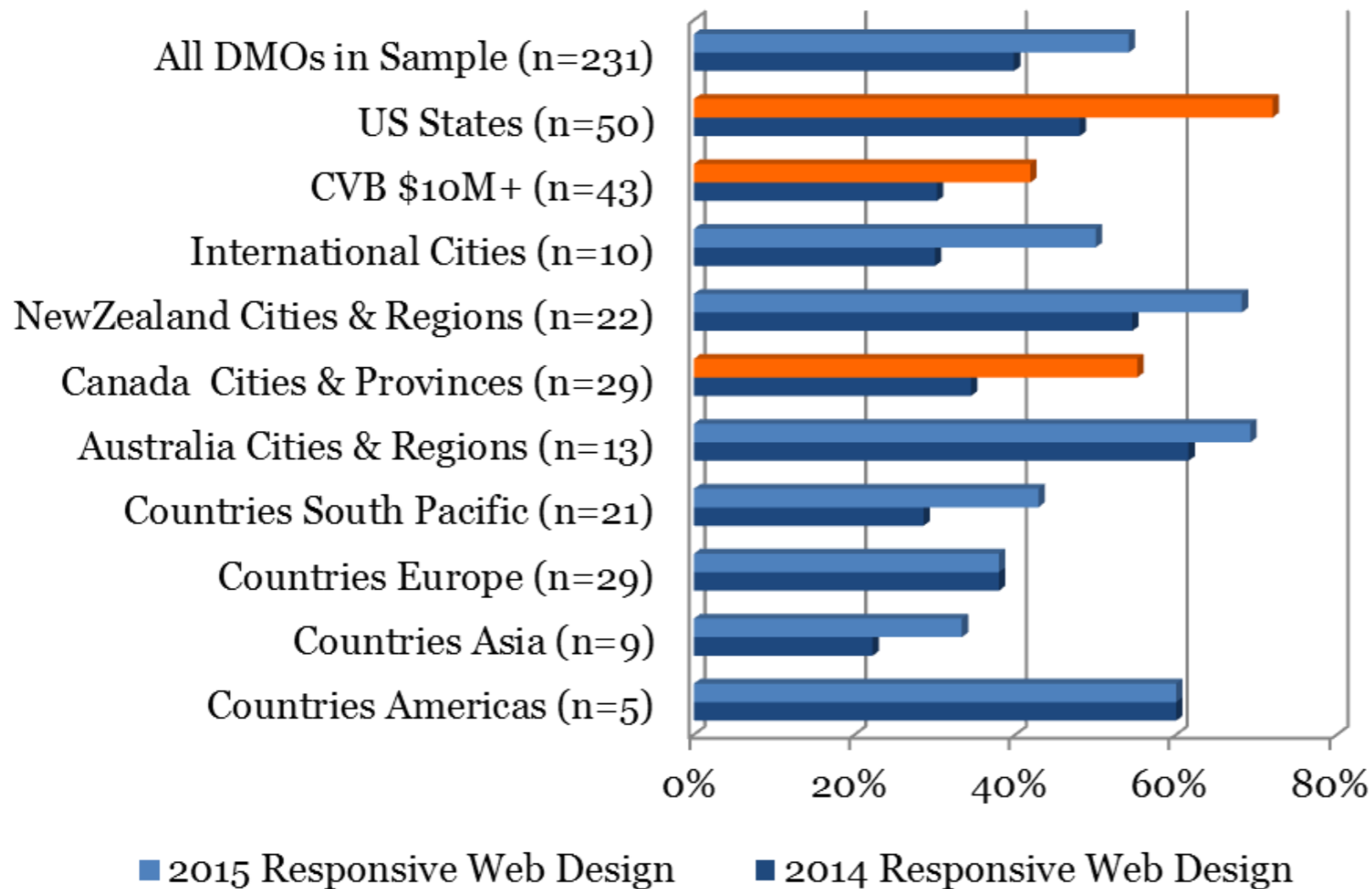
**Canada** (-3)

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



## Responsive Web Design 2014 to 2015 Comparison

From 2014 to 2015 an additional 33 websites became responsive representing an increase of 36%. This corresponded with a drop in the number of mobile specific websites.



### Highlights 2014 to 2015

Greatest increase in the use of mobile specific websites occurred with the following types of DMOs.

**US States** (+12)

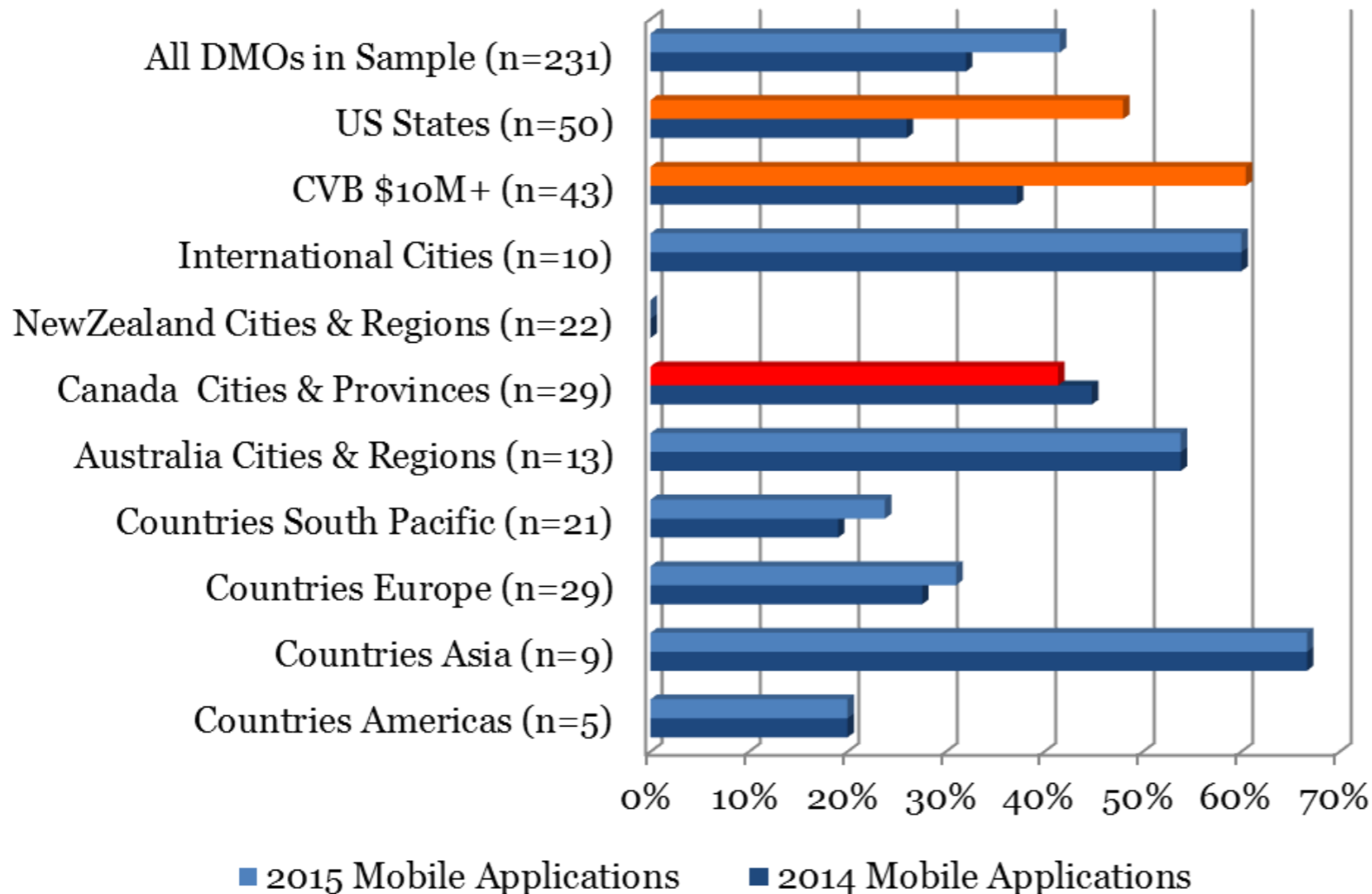
**Canada** (+3)

**Large CVB \$10M+** (+5)



## Mobile Applications 2014 to 2015

From 2014 to 2015 an additional 22 official DMO mobile applications were identified representing a 30% increase. However, there is some early indication that older Apps are not being updated and more of new applications are for specialist uses, topics or audiences – rather than for general travel information.



### Highlights 2014 to 2015

The most significant activity in mobile applications came from DMOs in North America – notably States and Large City CVBs:

**US States** (+11)

**Large CVB \$10M+** (+10)

New Zealand and **Canada** were two regions showing no growth – or a drop in the use of mobile apps.



## KEY TAKEAWAYS

- 1. Mobile Readiness Starts with Responsive.** 54 % of DMOs now have a Responsive Site. Responsive websites offer significant advantages (over Mobile Specific Site) in simplified content management (one site, not multiple), SEO – Organic Search benefits and being “Future Proofed” for new devices & appliances – but does create more complexity and cost. Despite this DMOs are have past the 50% mark and are rapidly moving to ‘Responsive first’
- 2. Fast and flexibility critical advantage in Mobile Readiness** Certain type of DMOs (eg: States) are adopting mobile friendly platforms more rapidly than CVB’s. This appears to be related to the complexity and focus of the DMO. CVBs are often more complex organizations with a wider range of responsibilities which may impact their ability to innovate – and/or the benefits of a Responsive Site is less compelling to them.
- 3. Signs that sweet spot for Apps is specialist topics.** There are early signs that Apps are moving into specialist areas – not just another version of a DMO’s mobile or responsive site. Specialist Apps include new, electronic versions of the destination travel guide; dining/nightlife and food/wine trails, event based apps plus apps for meeting planners and international travelers.



### Methodology Websites

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](http://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.

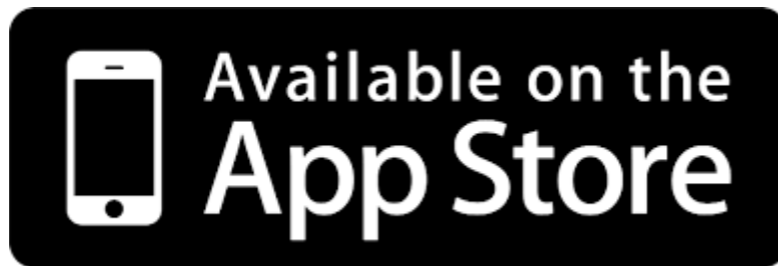
**Step 3 Website Review Not mobile friendly.** For websites that did not indicate mobile friendly, the home page of the DMO was visited using a desktop computer to search for evidence of a mobile website.



## 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 Columbia<sup>1</sup>, Charlotte, Chicago, Columbus, Dallas, Denver, Detroit, Fort Myers, Gold Coast<sup>1</sup>, Houston, Indianapolis, Kissimmee, Las Vegas, Los Angeles, Louisville, Miami, Montreal<sup>1</sup>, 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, Toronto<sup>1</sup>, 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 Information<sup>2</sup>, 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 Site<sup>2</sup>, 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 DMO's listed in the Convention and Visitor Bureaus list with budgets of more than \$10 million were also listed in their respective country indexes.

2. Regional Tourism – One regional tourism organizations were listed within their appropriate indexes; New Zealand .



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### More Information

This report was prepared by Dr. Chris Gibbs from the Ted Rogers School for Hospitality and Tourism Management at Ryerson University in Toronto with support from Chris Adams, Director of Research and Online Marketing 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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## Additional Information & Detail

### Mobile Ready 2014 to 2015 Comparison

#### Mobile Ready DMOs

<b>DMO Categories</b>	<b>2014</b>	<b>2015</b>	<b>Variance<sup>a</sup></b>	<b>% Change<sup>b</sup></b>
Countries Americas (n=5)	80%	100%	20%	25%
Countries Asia (n=9)	44%	67%	22%	50%
Countries Europe (n=29)	62%	66%	3%	6%
Countries South Pacific (n=21)	48%	57%	10%	20%
Australia Cities & Regions (n=13)	92%	100%	8%	8%
Canada Cities & Provinces (n=29)	66%	83%	17%	26%
NewZealand Cities & Regions (n=22)	68%	77%	9%	13%
International Cities (n=10)	40%	60%	20%	50%
CVB \$10M+ (n=43)	88%	95%	7%	8%
US States (n=50)	92%	96%	4%	4%
<b>All DMOs in Sample (n=231)</b>	<b>74%</b>	<b>83%</b>	<b>9%</b>	<b>12%</b>

<sup>a</sup> Variance - Columns 2015 less column 2014.

<sup>b</sup> % Change -Increase or decrease from 2014 to 2015.



## Mobile Websites 2014 to 2015 Comparison

### DMOs with Mobile Websites

<b>DMO Categories</b>	<b>2014</b>	<b>2015</b>	<b>Variance<sup>a</sup></b>	<b>% Change<sup>b</sup></b>
US States (n=50)	66%	24%	-42%	-64%
CVB \$10M+ (n=43)	63%	53%	-9%	-15%
International Cities (n=10)	10%	10%		
NewZealand Cities & Regions (n=22)	14%	9%	-5%	-33%
Canada Cities & Provinces (n=29)	38%	28%	-10%	-27%
Australia Cities & Regions (n=13)	31%	31%		
Countries South Pacific (n=21)	19%	14%	-5%	-25%
Countries Europe (n=29)	31%	28%	-3%	-11%
Countries Asia (n=9)	22%	33%	11%	50%
Countries Americas (n=5)	60%	40%	-20%	-33%
<b>All DMOs in Sample (n=231)</b>	<b>42%</b>	<b>29%</b>	<b>-13%</b>	<b>-32%</b>

<sup>a</sup> Variance - Columns 2015 less column 2014.

<sup>b</sup> % Change -Increase or decrease from 2014 to 2015.



## Responsive Web Design 2014 to 2015 Comparison

### DMOs using Responsive Web Design

<b>DMO Categories</b>	<b>2014</b>	<b>2015</b>	<b>Variance<sup>a</sup></b>	<b>% Change<sup>b</sup></b>
US States (n=50)	48%	72%	24%	50%
CVB \$10M+ (n=43)	30%	42%	12%	38%
International Cities (n=10)	30%	50%	20%	67%
NewZealand Cities & Regions (n=22)	55%	68%	14%	25%
Canada Cities & Provinces (n=29)	34%	55%	21%	60%
Australia Cities & Regions (n=13)	62%	69%	8%	13%
Countries South Pacific (n=21)	29%	43%	14%	50%
Countries Europe (n=29)	38%	38%		
Countries Asia (n=9)	22%	33%	11%	50%
Countries Americas (n=5)	60%	60%		
<b>All DMOs in Sample (n=231)</b>	<b>40%</b>	<b>54%</b>	<b>14%</b>	<b>36%</b>

<sup>a</sup> Variance - Columns 2015 less column 2014.

<sup>b</sup> % Change - Increase or decrease from 2014 to 2015.



## Mobile Applications 2014 to 2015 Comparison

### DMOs with Mobile Applications

<b>DMO Categories</b>	<b>2014</b>	<b>2015</b>	<b>Variance<sup>a</sup></b>	<b>% Change<sup>b</sup></b>
US States (n=50)	26%	48%	22%	85%
CVB \$10M+ (n=43)	37%	60%	23%	63%
International Cities (n=10)	60%	60%	0%	
NewZealand Cities & Regions (n=22)	0%	0%	0%	
Canada Cities & Provinces (n=29)	45%	41%	-3%	-8%
Australia Cities & Regions (n=13)	54%	54%	0%	0%
Countries South Pacific (n=21)	19%	24%	5%	25%
Countries Europe (n=29)	28%	31%	3%	13%
Countries Asia (n=9)	67%	67%	0%	0%
Countries Americas (n=5)	20%	20%	0%	0%
<b>All DMOs in Sample (n=231)</b>	<b>32%</b>	<b>42%</b>	<b>10%</b>	<b>30%</b>

<sup>a</sup>Variance - Columns 2015 less column 2014.

<sup>b</sup>% Change -Increase or decrease from 2014 to 2015.