

An aerial photograph of a small, red, square lighthouse situated on a tiny, low-lying island in the middle of a vast, calm body of water. A long, narrow pier or walkway extends from the bottom left towards the lighthouse. The sky is a mix of orange, yellow, and blue, suggesting a sunset or sunrise. The water reflects the colors of the sky and the lighthouse.

Data-Driven Destination Development: Measuring and Enhancing Visitor Experiences

Today's Presenters



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Who is Rove?

Rove is a travel & tourism data infrastructure and analytics company.

Tourism organizations & destinations globally rely on our tourism infrastructure & analytic products and industry expertise to navigate change and maximize travel visitation and revenue growth.

Proud supporters and sponsors of TTRA.

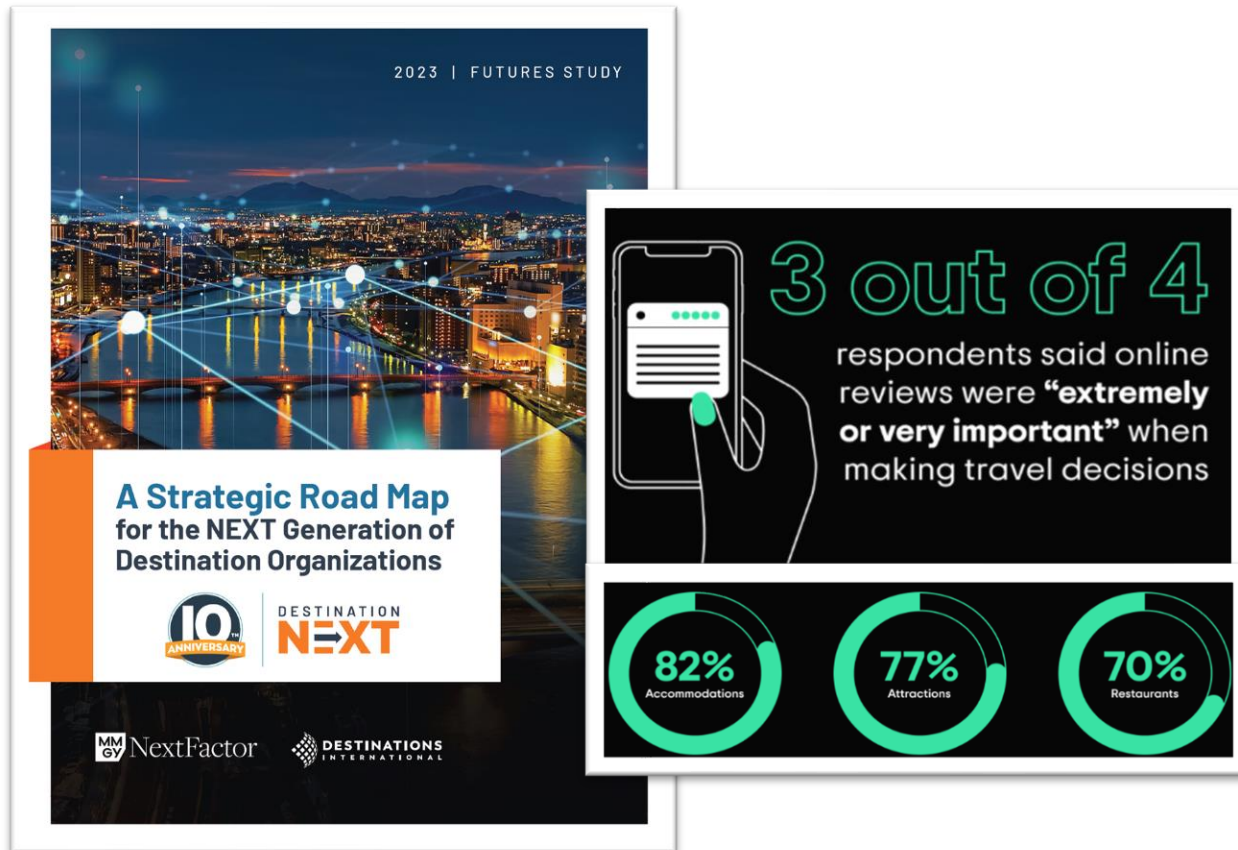


Agenda

1. Importance of the Visitor Experience
2. What is Rating & Review Data
3. Visitor Experience Data in Action
4. Revealing Insights with Destination Door County
5. Q&A and Closing

Importance of the Visitor Experience

All Roads Lead to **Visitor Experience** Strategy, Evolving KPI's and Decision Influence



- **#2 Strategy:** Developing **authentic experiences** for the customer
- **#2 Evolving KPI's – Visitor Satisfaction**
- **#2 Top Trends** – Customers are increasingly seeking a **unique, authentic travel experience**
- **#3 Top Trends** – Communities expect to be more engaged in **destination, product and experience development** for locals and visitors
- **Importance & Influence** – ~**500 million unique visitors**/month; **30.2 million reviews** submitted by 17.4 million members

Measuring Visitor Experience

Key to Manage and Measure Destination Performance

A Quality Experience Positively Impacts:

1. Spending
2. Loyalty and Repeat Visits
3. Reputation
4. Competitive Advantage
5. Awareness and Decision Making



What is **Rating & Review**

Visitor Experience - Beyond the Survey



Leverage sentiment rating and review data from major global platforms

Scalable and Measurable Insights

- Numeric Rating
- Sentiment
- Travel Experience Score
- Publicly available & DPR compliant

Quantify Sentiment Across Sectors

- Accommodations
- Restaurants
- Attractions

Aggregated and Property Level Insights

- Trends and seasonality
- Destination, region, neighborhood comparisons
- Visitor segments
- Origin markets, etc.



Visitor Experience Data In Action

Destinations Monitoring Visitor Experience via TravelSat



Identify Strengths and Weaknesses to Inform Tourism Vision

Use case – Review data used to map London’s competitive strengths and weaknesses to drive the Tourism Vision 2030 + Visitor Experience Strategy.

Data scope: 1.7 million reviews analyzed across 2,000+ POIs dispersed in all neighborhoods.

Benchmark against competitive set – 10 Key Urban Global Competitive Cities across Europe, North America and Asia.

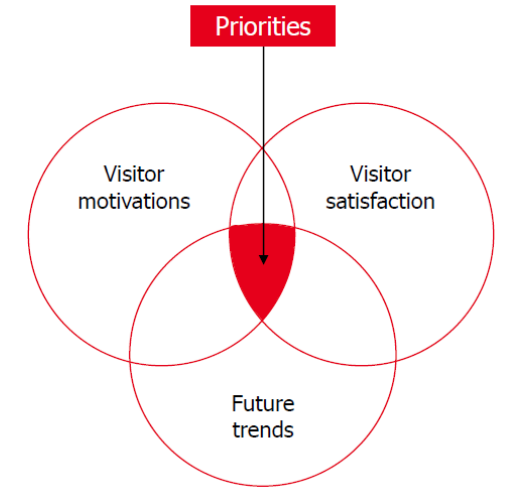
Extensive analysis – Granular trends per season, markets, districts, travel companions, experience categories, etc.

Results – Results informed the Tourism Vision 2030 and 2024 London Visitor Experience Strategy.

Impact –

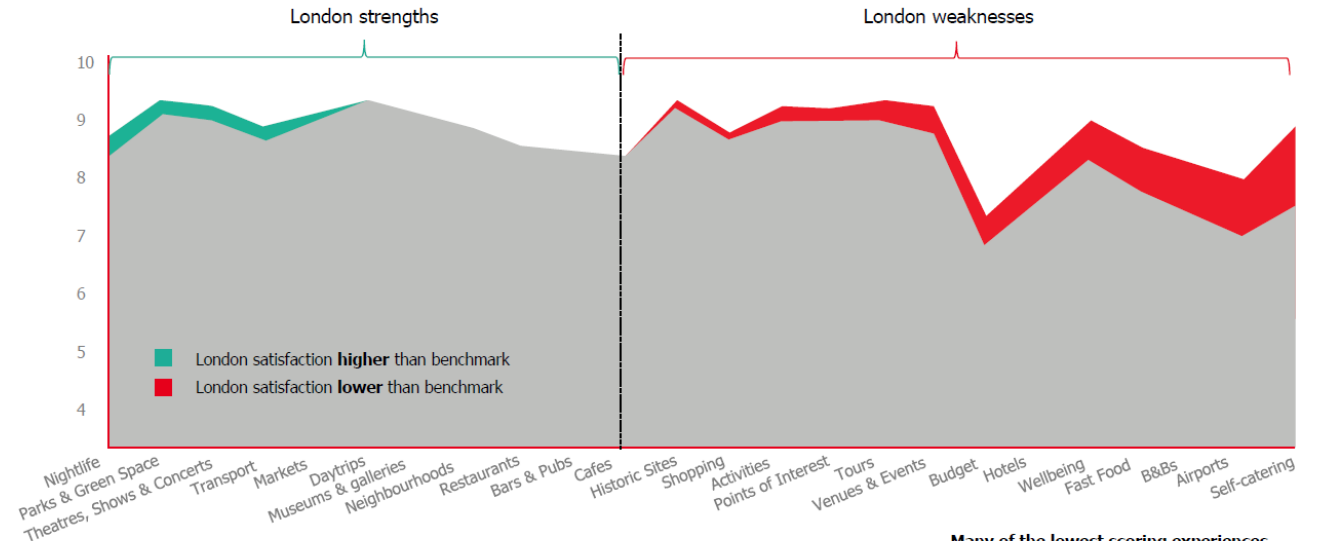
1. Joint strategy aligning DMO’s stakeholders
2. Tighten relationship with industry and public partners.
3. Strategy to diversify products and provide more unique experiences

LONDON™
& PARTNERS



London experiences – strengths and weaknesses

There is a strategic choice for London. Should we improve weaknesses or build on our strengths?



Many of the lowest scoring experiences are accommodation and budget related

Monitor Destination Performance and Award Best-in-Class Operators



Use case – Year-in-review visitor satisfaction data used to monitor destination performance and reward best-in-class operators.

Data scope: Half a million reviews consolidated from 254 Hotels, 246 Restaurants and 500 Attractions across Brussels.

Benchmark against competitive set – 15 European Capital Cities.

Extensive analysis – Granular trends per season, markets, districts, travel companions, experience categories, etc.

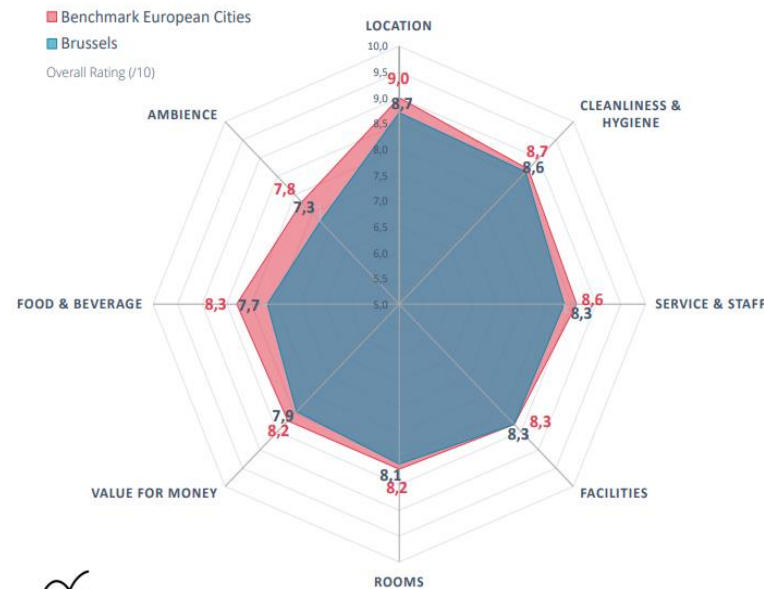
Results – TravelSat KPIs integrated into overall DMO measurement strategy, committed to sharing with Board Members and Industry representatives.

Impact – Rating results used to measure visitor experience and encourage industry operators to increase satisfaction, identify and reward the “Best operators” of the year based on their Travelsat Rating Score.



Accommodation Sub-ratings

Brussels accommodations' strengths and vigilance areas



A deep dive into Brussels' Accommodation sub-ratings shows that **properties' location** is rated highest. **Cleanliness and hygiene**, important factors for travelers post-pandemic, **come in at a close second**.

Nevertheless, **ambient factors**, such as the décor and lighting, of Brussels' Lodgings **are rated lowest** in comparison to other sub-ratings, yet **food and beverage hold the largest difference versus the benchmark**. As such, more attention should be placed to these two areas.

Finally, the perceived value for money is evermore crucial in the current context of inflation, meriting that **Accommodation expenses** are leveraged with a special degree of attention to detail towards the visitor experience.

Note: the sub-ratings analysed concern private properties in Brussels and not public areas



2022

Blending Data Sources & Scorecard KPIs



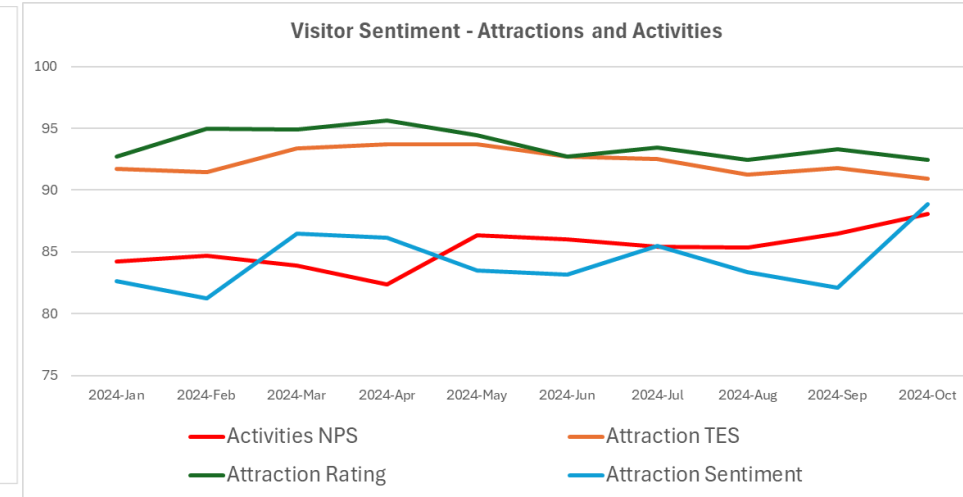
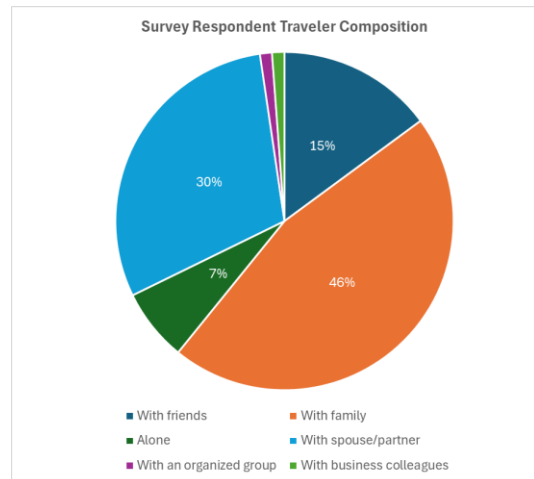
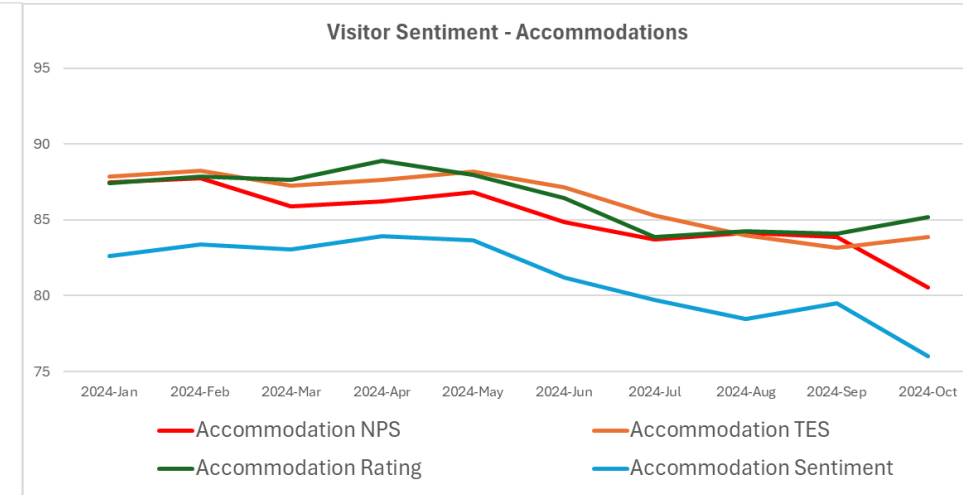
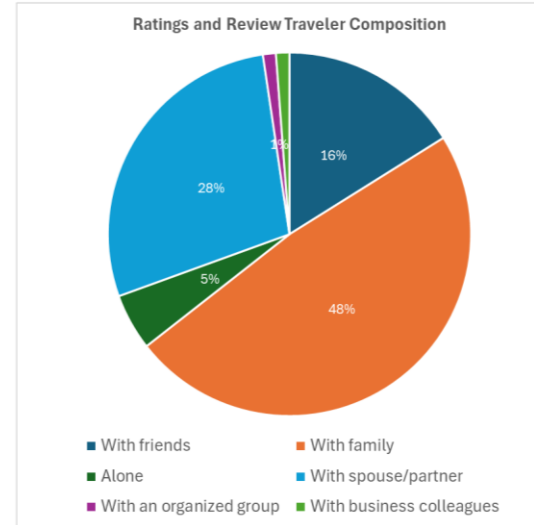
Use case – Integrate TravelSat Visitor survey results and Rating + Review satisfaction data to monitor the Visitor experience across verticals.

Data scope – Annual reviews consolidated from 70 Hotels, 110 Restaurants and 100 Attractions and more than 8K annual survey responses.

Visitor sentiment scorecard development – Enhance insights by bringing together different data sources to validate trends and help answer the “why’s”.

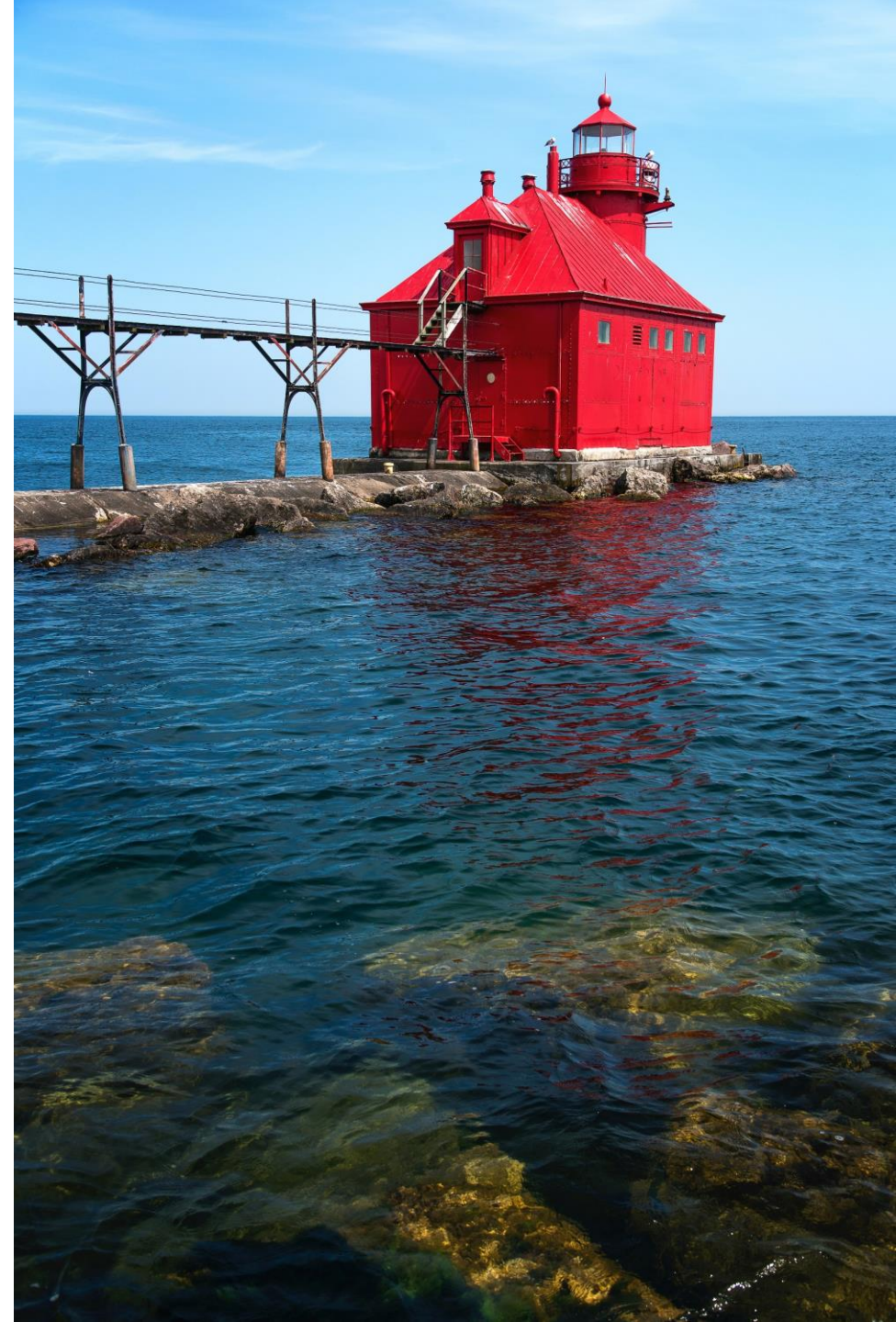
Results – Establish and confirm visitor composition profiles to understand and validate visitor type and market share. Create trend charts across each vertical to compare visitor scores over time.

Impact – Ongoing tool for internal teams to reference and monitor visitor perception over time to help understand context and factors driving scores to ultimately drive action.

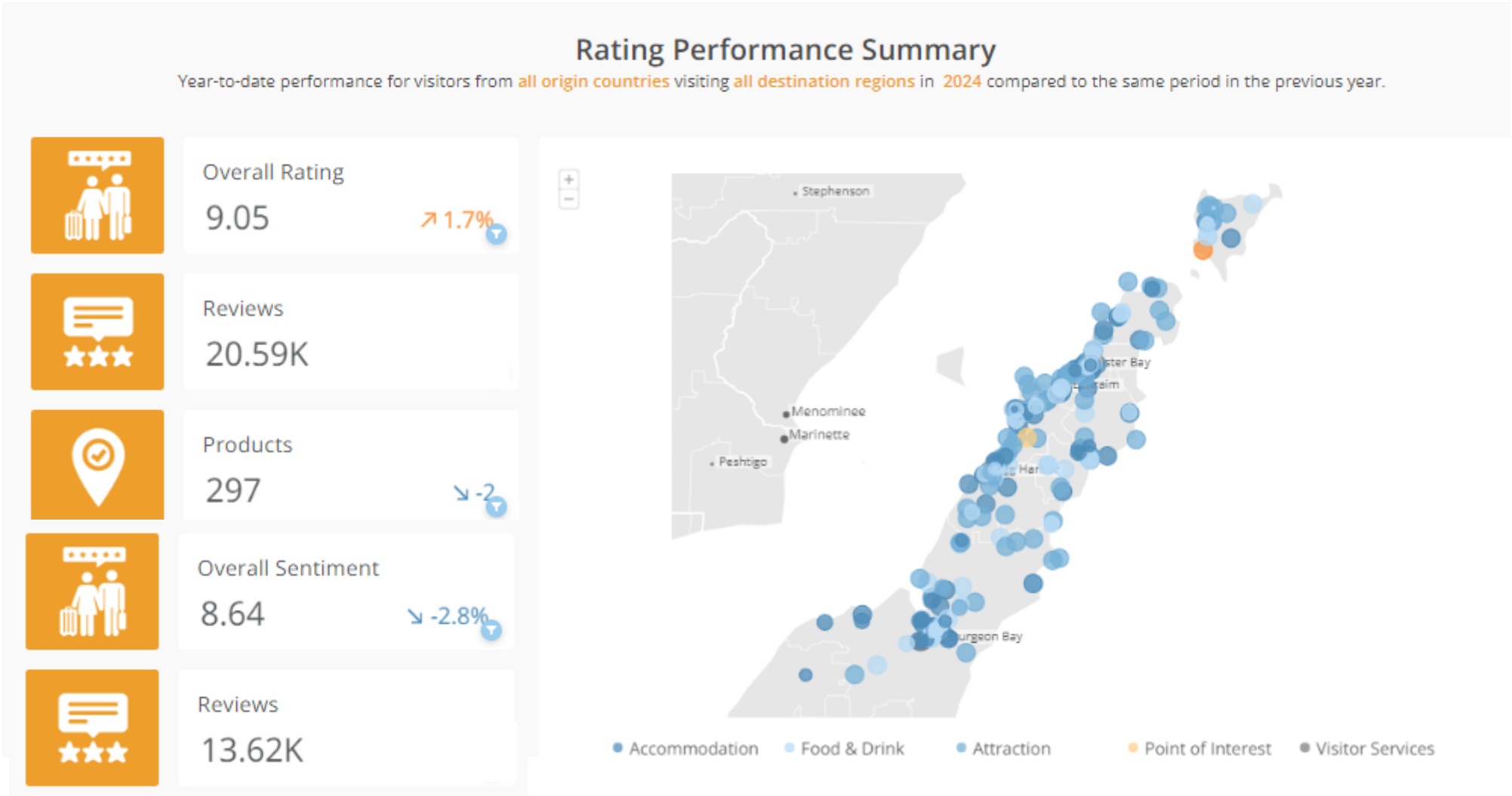


Revealing Insights

DESTINATION
DOOR
COUNTY



Destination Snapshot



Sentiment by Sector

Sentiment by Sector

Discover the performance of the product sectors available in your market through their scores and numbers of reviews.



Accommodations

8.25

↓ -3.4%



Attractions

8.99

↓ -4.7%



Food & Drinks

8.75

↓ -1.1%

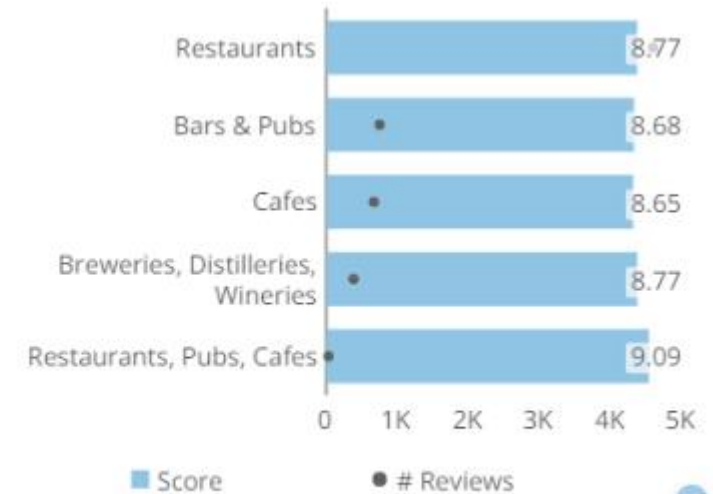
Accommodations Sub-Sectors



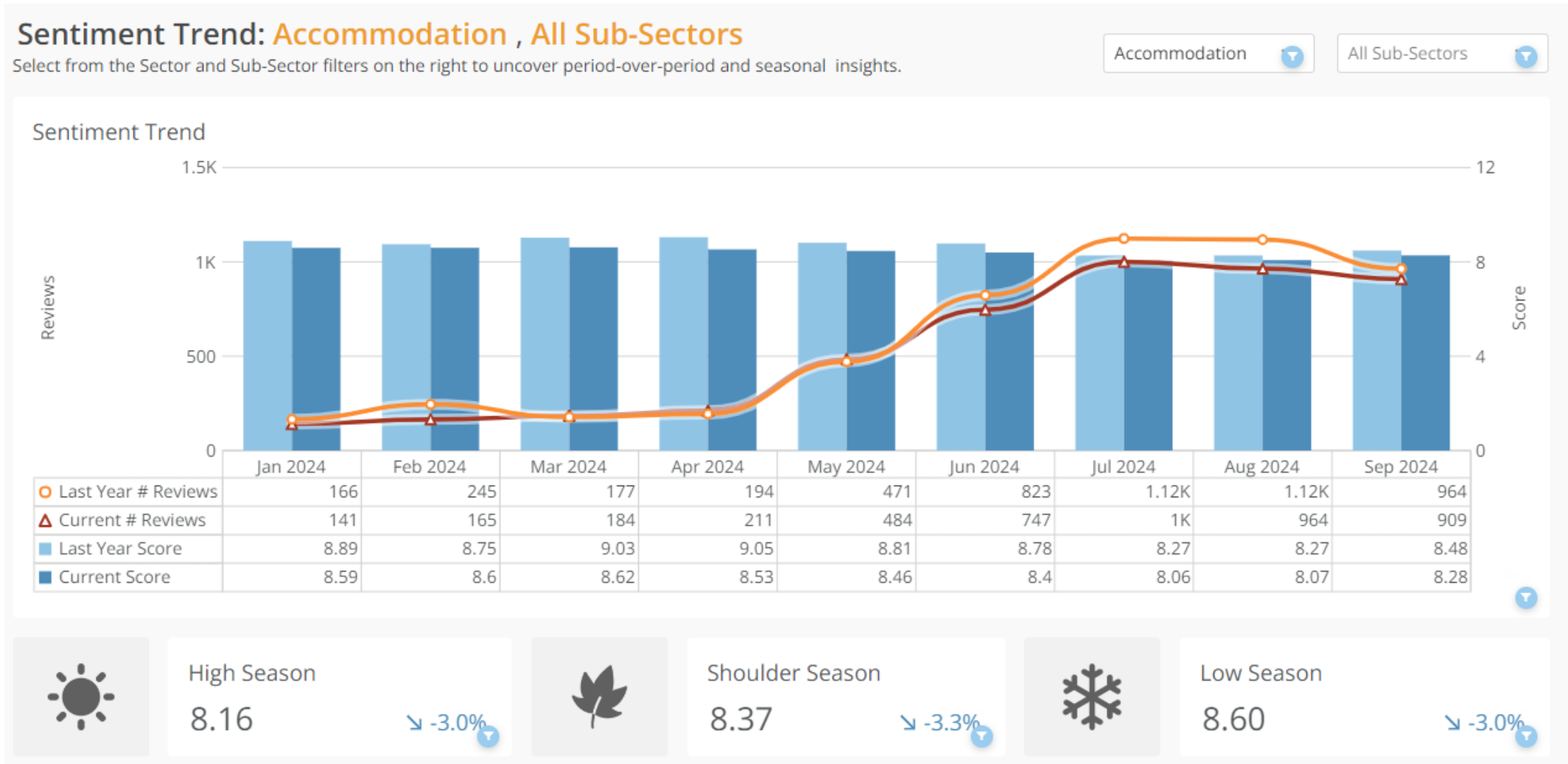
Attractions Sub-Sectors



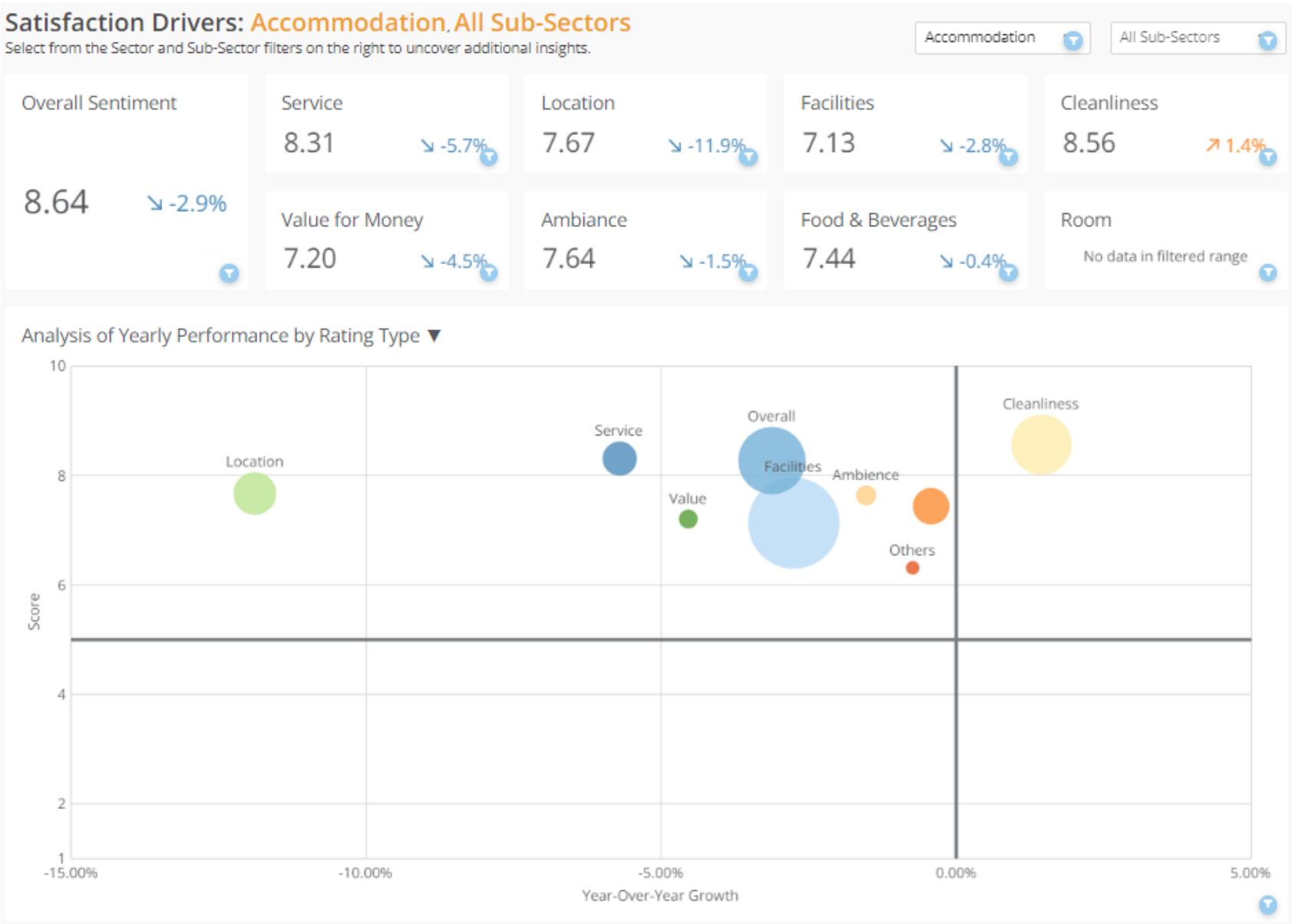
Food & Drinks Sub-Sectors



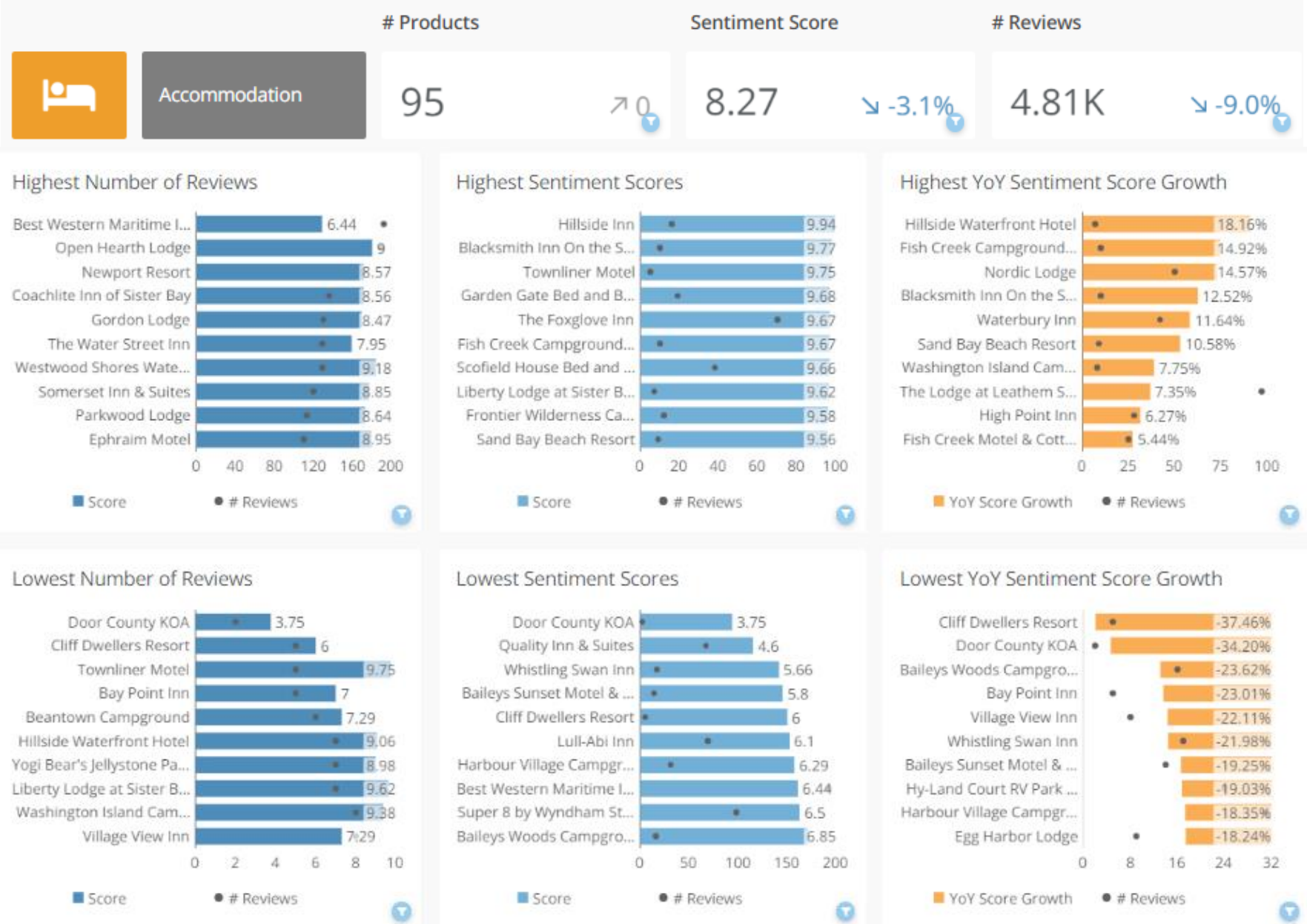
Trends by Sector



Accommodation – Sentiment Drivers



Accommodation Deep Dive – Property Level Analysis



Certified Tourism Ambassador Program



ECONOMIC GROWTH

Growing the local economy through strong businesses, enhanced visitor spending, and workforce development.

INDUSTRY PARTNERSHIPS

Engaging traditional and non-traditional partnerships to strengthen tourism and the tourism product.

TOURISM AWARENESS

Increasing business and local residents' awareness of the importance of tourism and working to preserve the community they love.

QUALITY EXPERIENCE

Enhancing visitor satisfaction and fueling positive word-of-mouth through a knowledgeable and connected front-line.

Accommodation Deep Dive – Property Level Analysis

Best Western Maritime Inn Profile

Accommodation ★★☆☆☆ - Hotels and Inns | 1001 N 14TH A



Overall Sentiment

6.38

↓ -15.5%



Reviews

170

↓ -1.7%



Overall Rank

28 out of 95



Region Rank

10 out of 20



City Rank

9 out of 19



Satisfaction Drivers for Best Western Maritime Inn

In this section, discover what influences the Satisfaction scores provided by the product's reviewers. By clicking on a bubble of your choice, you can drill down into another level of details when available.

Analysis of Yearly Performance by Rating Type ▼

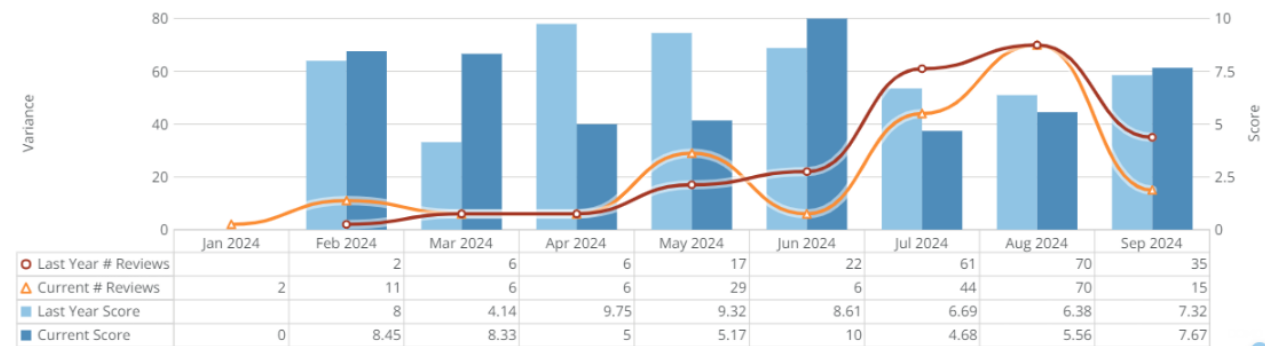


Cleanliness Trend Performance for Best Western Maritime Inn

This section presents the scores and review numbers over time. It helps you understand if there are any fluctuations in satisfaction during specific monthly or seasonal periods. Select from the filter on the right to change Satisfaction Driver measure.

Cleanliness

Product Trend



High Season

5.46

↓ -20.1%



Shoulder Season

5.90

↓ -27.2%

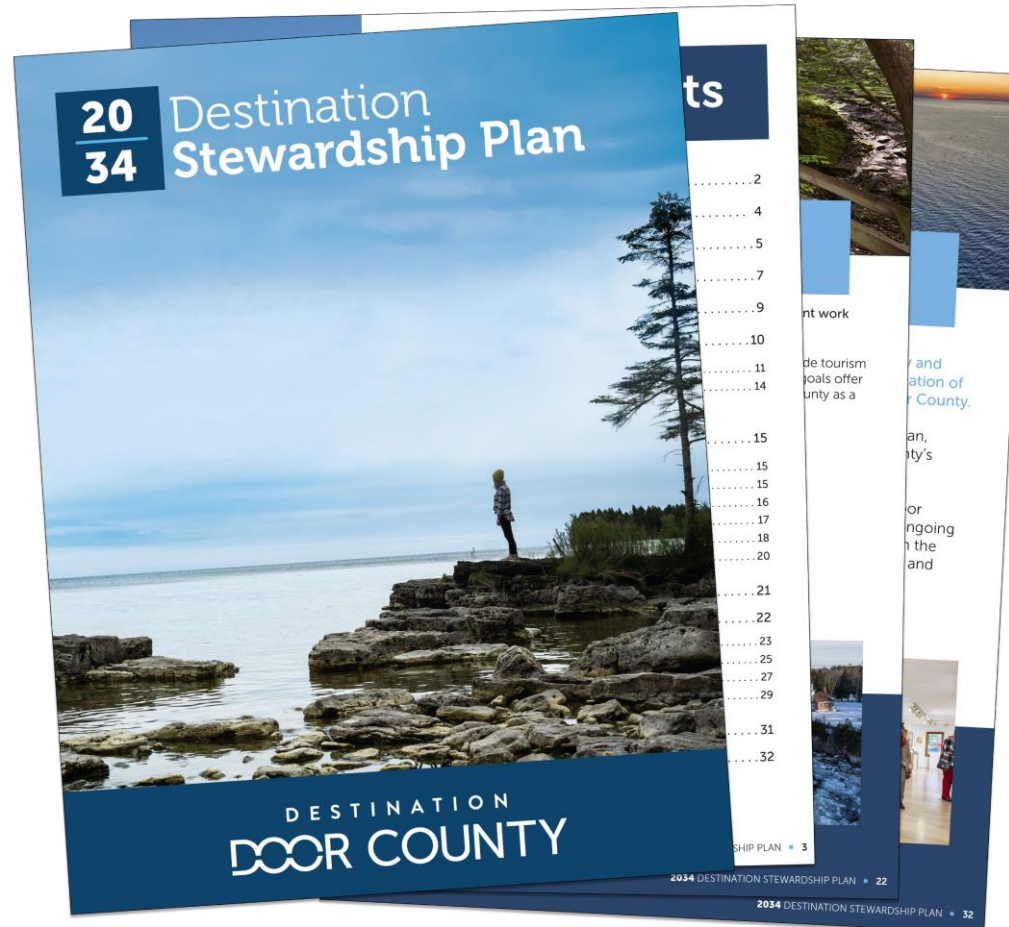


Low Season

7.53

↑ 35.7%

Aligning with Destination Stewardship



Destination Vision

The most exceptional place in the Great Lakes region to reset and connect with nature, arts, and adventure.

Stewardship Plan Strategic Goals

Support
Environmental
Sustainability

Develop and
Enhance
Experiences

Improve
Infrastructure

Champion
Community
Stewardship

Strategic Goal #2

2 Develop and Enhance Experiences

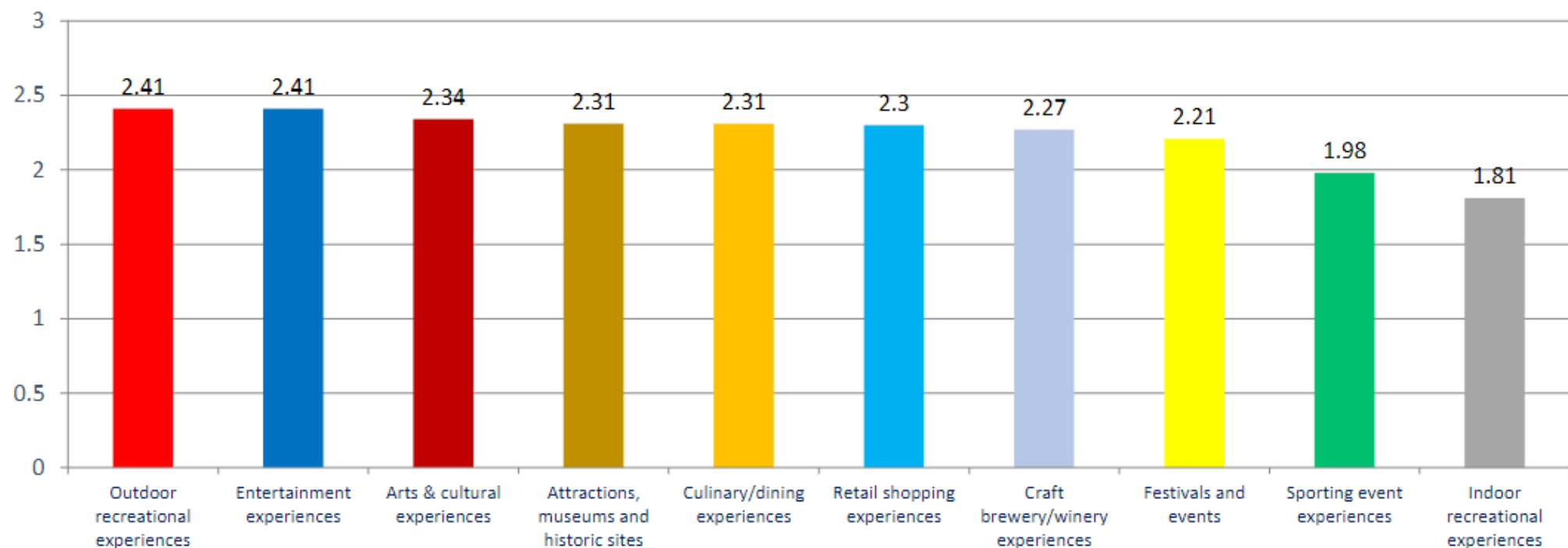
What this means:

- Continuing to develop high-quality visitor experiences
- Enhancements to local arts, history, culture, and agricultural offerings
- Incorporating art, heritage, history and culture into experiences
- Enhancing sense of place for visitors

Resident Perceptions

Quality of Experiences in Door County

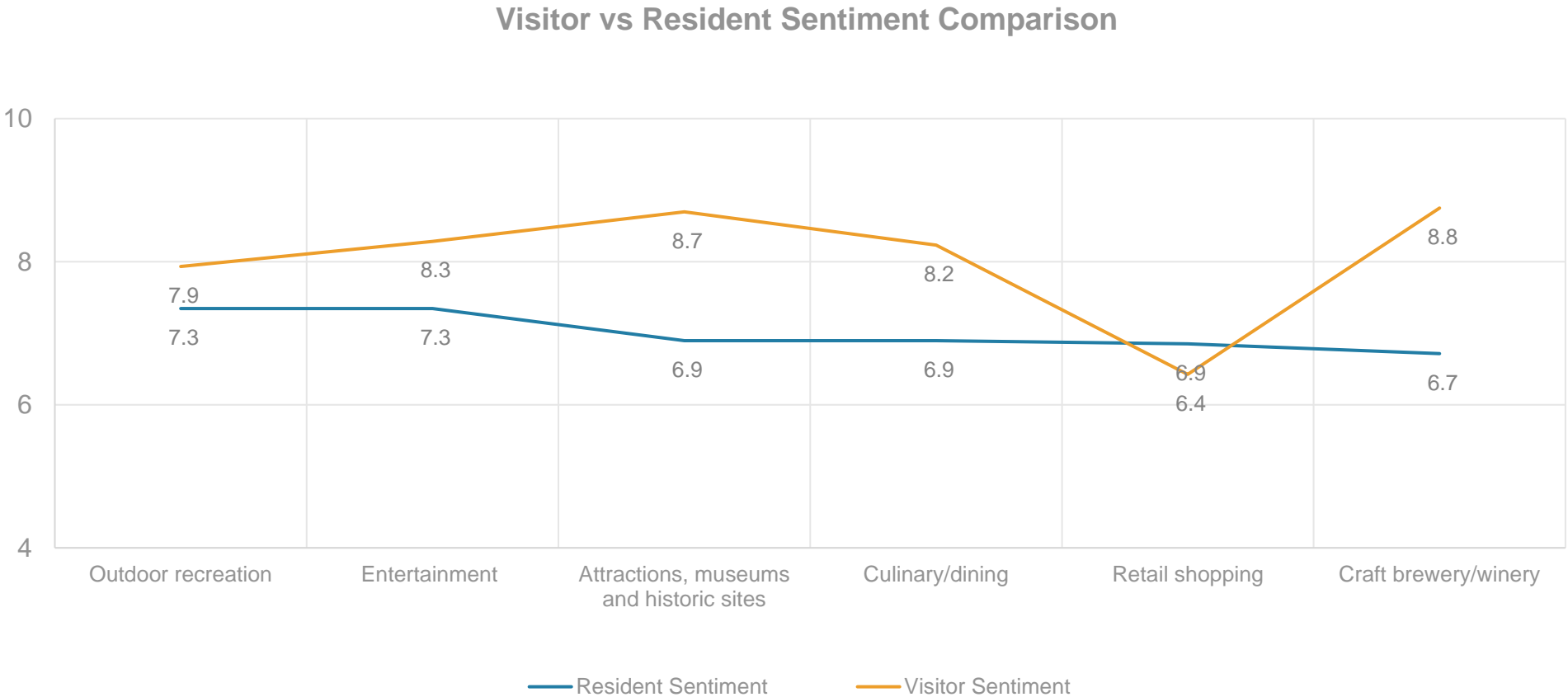
Outdoor recreation and **entertainment** were rated as the highest quality experiences in Door County, followed by **arts & culture**, **museums**, **dining** and **shopping**. Indoor recreation and sporting events were rated as the lowest quality experiences.






Please indicate your perception of the following experiences in the Door County.
(1-Low Quality;3-High Quality)

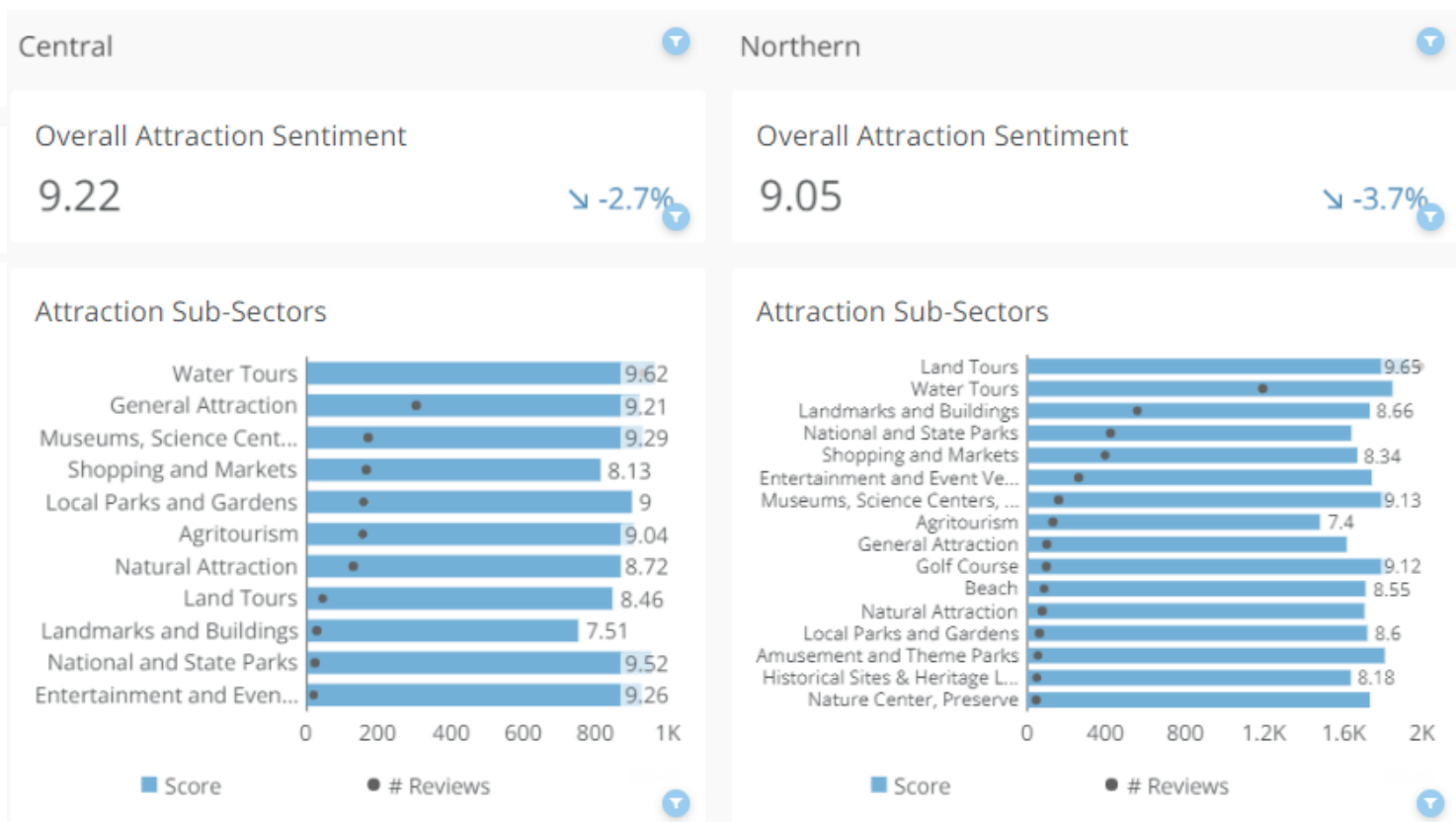
Aligning Resident and Visitor Perceptions

Understand Strengths, Weaknesses and Misalignment



Comparisons Across Destination

	Central	Northern
	Overall Sentiment 8.58 ↓ -2.0%	Overall Sentiment 8.73 ↓ -2.5%
	Reviews 9.75K ↓ -8.5%	Reviews 27.76K
	Products 80 ↑ 0	Products 214



Sentiment by Visitor Type

Satisfaction Measure (Sentiment) by Product Sub-Sector & Visitor Composition

	Couples	Families	Friends	Solo
Water Tours	8.41	8.53	8.46	8.55
Museums, Science Centers, Galleries	9.44	8.37	7.12	8.57
Local Parks and Gardens	7.23	8.18	7.73	
National and State Parks	7.5	7.18	7.11	10
Land Tours	8.92	8.93	9	8.67
Shopping and Markets	7.64	6.68	7.36	8
Entertainment and Event Venues	8.08	8.21	7.83	9.5
Landmarks and Buildings	7.72	7.82	7.39	
Natural Attraction	7.63	7.59	6.61	9.69
Nature Center, Preserve	8.64	8.75	8.33	10
General Attraction	8.55	8.4	8.99	8.61
Agritourism	7.22	6.65	6.23	7.43

Sub-sector Satisfaction Drivers



Action Items to Explore

- 1. Identify strengths and weaknesses to prioritize areas of opportunity to improve experience and increase competitiveness**
- 2. Integrate satisfaction drivers into Customer Training Program**
- 3. Quantify and measure destination stewardship strategic goal progress**
- 4. Manage and monitor destination reputation**
- 5. Share with Economic Development / Business Improvement Districts**

Key Takeaways

- 1. Positive visitor experiences has real meaningful results**
- 2. Management needs to be measured and monitored**
- 3. Share and collaborate with industry stakeholders and partners to drive action**

Thanks!

Questions?

reach out to learn more and schedule a demo
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