



# 2022 State of **Digital Marketing** Findings Report

June 2022

# Introduction:

## The State of Digital Marketing for DMOs

### in 2022

#### The pandemic has been challenging

for destination marketers. It has exposed cracks in funding models, core offerings, and even our mission and purpose. It has also changed user behavior and disrupted marketing in a big way. Travelers care more about experiences than ever before and expect brands to provide exactly what they want, precisely when they want it, and on the platforms they frequent most; doing so creates trust within a brand, as building relationships with consumers means everything.

As marketing leaders in your respective destinations, you are most likely keenly aware of these challenges and know that we are already in a new era of digital consumption, one that the pandemic has accelerated. Think about it — we're consuming more streaming and on-demand television, spending increased time researching on our phones, and connecting with friends and family through social media more than ever before.

We have learned we must be ready to move quickly and stay ahead of this evolving landscape. It's ushered in a new term, one we've heard thrown around in articles, blogs, and conversations: *digital transformation*. Digital transformation has moved from a concept to an objective; as with anything new, some early adopters will thrive, while many others will continue to lag as they struggle to evolve. Simply put, digital transformation is the process of using digital technologies to create new (or update existing) processes, culture, and experiences to meet the changing landscape.

As the role of digital marketing continues to change and expand, destination marketers will be faced with the ongoing reevaluation of their skills and capabilities. Travelers' expectations and the digital acceleration have increased the pressure for DMOs to be present on multiple digital channels, delivering personalized and diverse experiences along the way.

We believe there is an opportunity for strong growth coming out of this for those who react now — and many destinations are already experiencing this strong growth. Recent data supports the sentiment that there is high demand for leisure travel; in fact, Destination Analysts recently shared that 93% of U.S. travelers have plans to travel within the next 12 months, up from 60% at the end of 2020. Digital marketing will play a key role in influencing those travelers to choose your destination over another.

Our hope with the 2022 State of Digital Marketing Findings Report is to provide destination marketers with the latest data on how DMOs are using digital marketing to drive results. The objective is to identify and quantify the key practices being used by destination marketers to achieve digital marketing excellence. I hope the findings in this report and subsequent link to the raw survey data help you on your journey.



Best regards,

A stylized, handwritten signature in black ink.

Jason Swick  
VP of Strategy and Insights  
Simpleview

# Executive Summary



Simpleview's 2022 State of Digital Marketing Findings Report is a self assessment that looks to identify and quantify the key practices used by DMOs to achieve digital marketing excellence across three distinct categories: organization and strategy, audience and content, and attribution and measurement.

Based on a 40 question survey compiling answers from 74 DMO respondents across North America and Europe, the report provides insights into what strategies, channels, and activities perform best for DMOs. It also looks to identify trends, innovations, and metrics for measuring digital marketing success.

## Key Findings & Insights:

- **36% of respondents** have a total operating budget of \$1-\$5 million, while only 11% have a total operating budget of more than \$10 million
- 56% spend **more than half** of their marketing budget on digital
- **Budget constraints, staffing resources, and proving the value of marketing efforts** are the biggest challenges facing destination marketers today
- **67% of DMOs work with two or fewer agencies, and 41% with only one** – more than half of respondents stated that the agencies work mostly independently with little to no collaboration
- **Only 8% of DMOs have a dedicated data resource on staff** while 55% have no data resource available
- Primary data sources used to deliver personalized content for digital marketing are **social media, web analytics, and survey/data research**
- One in five DMOs use **no audience segmentation**
- Although creating a more personalized web experience was important, **58%** do not run any A/B testing on landing pages
- Social, web content, and SEO were seen as the **most effective** channels
- If a DMO could only choose **one marketing channel**, organic traffic was listed as the most important
- **67%** identified as being satisfied with their current digital marketing efforts, and **only 14%** were very satisfied with their current efforts
- **70%** say they are worried about the upcoming deprecation of 3rd party cookies but are waiting for things to play out before committing to an approach, while **1 in 5** stated that they are not worried at all
- The biggest thing coming down the pipeline that destination marketers are looking forward to is **unifying data for more impactful measurement**

# Budget Constraints, Staffing & Proving the Value of Marketing Efforts are the Biggest Digital Marketing Challenges

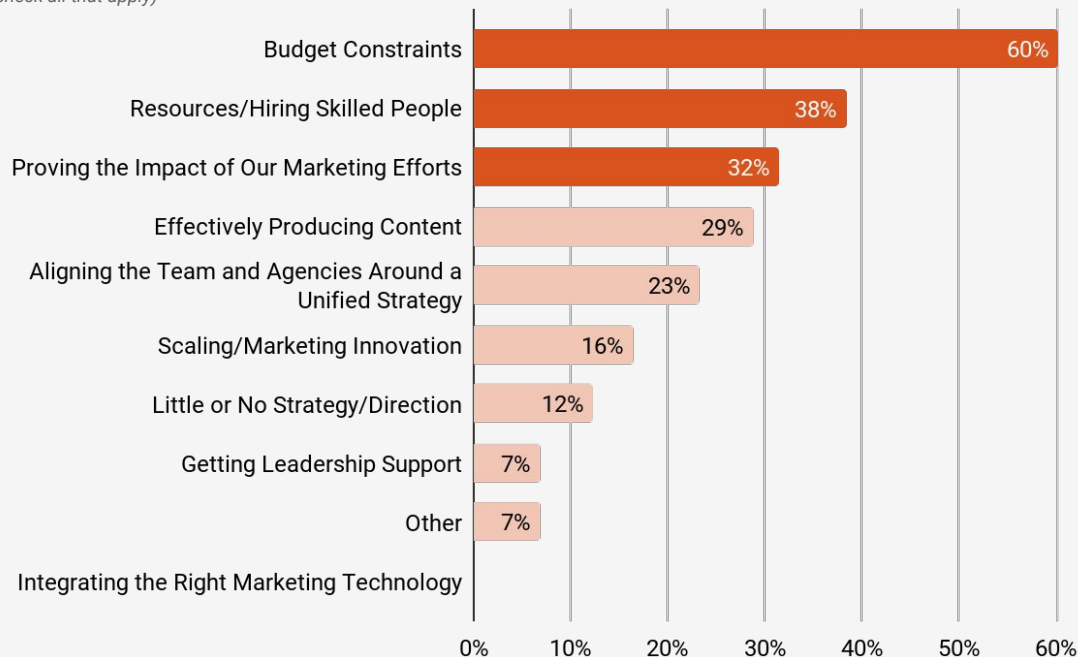
One of the most frequently asked questions of the strategy and insights team centers around what we feel are the biggest challenges facing destination marketers. Therefore, we asked DMOs, “What were some of the challenges you as destination marketers are facing today?” Our respondents cited budget constraints (60%), resources/hiring skilled people (38%), and proving the impact of our marketing efforts (32%) as their **top three challenges**. The good news is that getting leadership support and integrating the right marketing technology are at the bottom of the list.

On the downside, the difficulty of hiring the right people in-house today is a concern facing almost every destination organization. In fact, one in three named this as one of the biggest challenges they face today. According to the most recent [Bureau of Labor Statistics](#) report, the U.S. leisure and hospitality sector remains 9% below its pre-pandemic levels. Out of the 2.1 million jobs left to recover, leisure and hospitality account for 1.5 million of that – 73% of all jobs still lost.

FIG 1:

## What are your biggest digital marketing challenges this year?

(check all that apply)

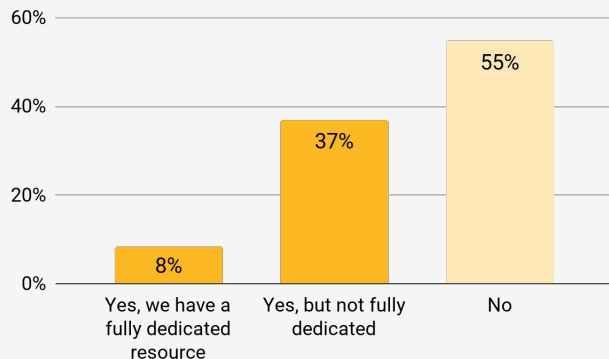


We asked, “When looking for additional resources, what are the most desired skills you’re looking for in your new hires?”

More than half surveyed mentioned content writing and social media as their top desired skills. Data analysis was a close third at 47%, and something we expect to see a lot more of with the growing need for data insights. However, 55% of DMOs surveyed do not have a resource currently dedicated to data analysis and measurement, but 1 in 3 plan to hire one within 12 months.

**FIG 3:**  
Within your organization, do you have dedicated measurement personnel that support digital marketing activities?

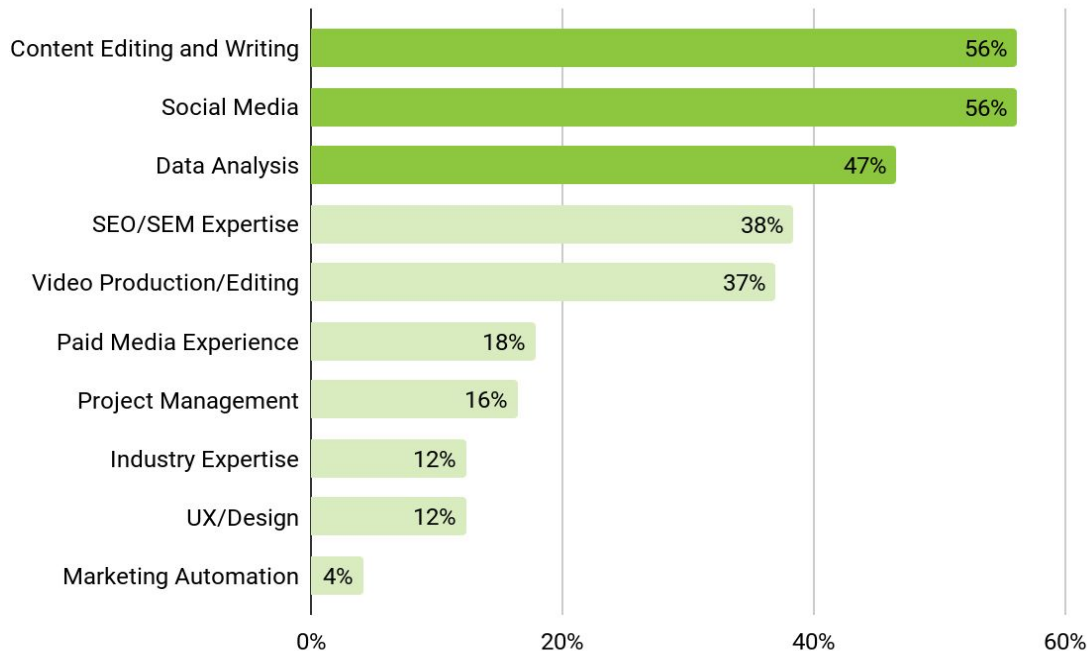
(ie Data Analyst, Data Scientist, etc.)



**FIG 2:**

## When looking for additional resources, what are the most desired skills for your digital marketing hires in 2022?

(check top three skills)



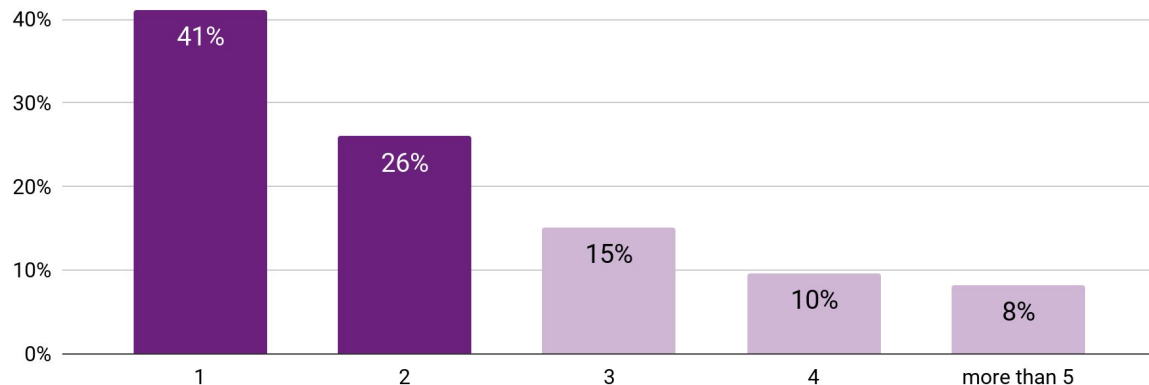
# Majority of DMOs **Work with Two or Fewer** Agency Partners

Budget constraints were identified as a top challenge, which means we will have to do more with less and be more effective with what we are already doing. For DMOs, that means often working with third-party vendors and agencies to help deliver on objectives and fill voids in resources and skill sets.

We asked, “How many agency partners do you work with on your digital marketing activities?” Results showed that 67% work with only two or fewer agencies and 41% work with only one agency partner.

**FIG 4:**

Including your agency of record, how many agency partners do you work with for digital marketing activities?



Source: Simpleview State of Digital Marketing Survey for DMOs, Q2 2022; Base: N=74

Collaboration is key to any successful agency partnership, however, it is our experience that there are still challenges in the space, including:

- **Lack of information sharing across agency partners and services**
  - The norm historically has been to keep things close to the vest
- **Duplicated assessments to identify needs**
  - Who owns the strategy and direction?
- **Poorly coordinated activities across agencies**
  - Loosely coordinated meetings
  - Unaligned goals and objectives
- **Lack of continuity which creates inconsistent levels of service**
  - Poor follow-up and planning
- **Clear responsibilities and accountability**
  - Who specifically is doing what?
  - Who is leading?



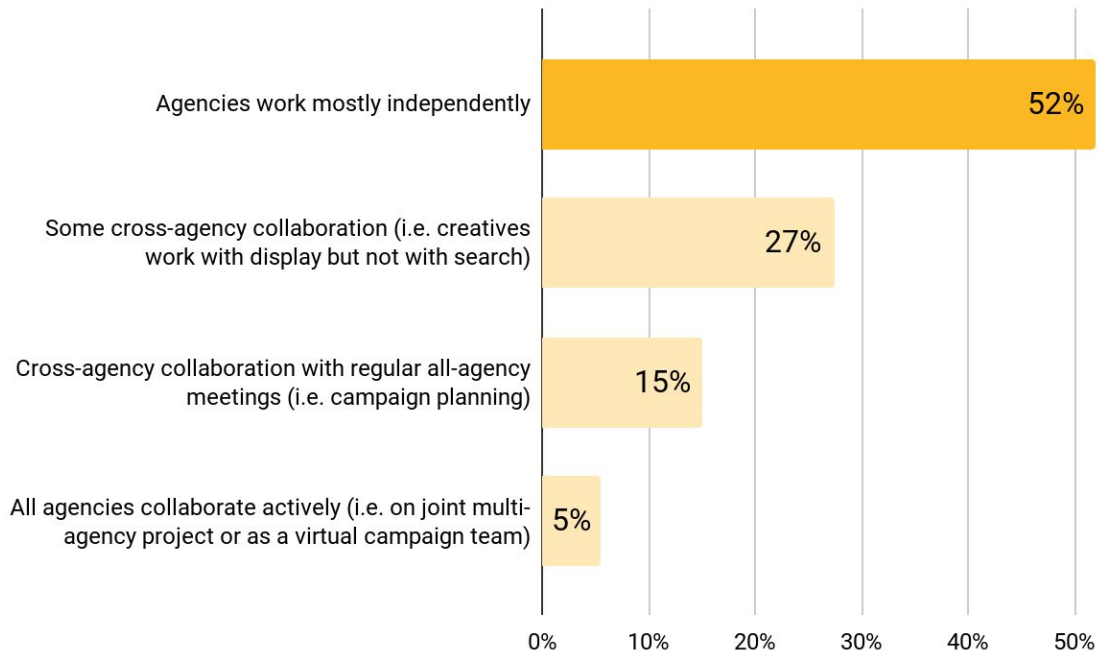


Evolving into a culture of collaboration seems to be more important than ever before. We posed the question, “Which of the following best describes how your agency partners work together?” In reply, 52% said their agencies work mostly independently today, and only 15% regularly collaborate across all agencies. We found this surprising and would have expected more cross-team collaboration. With so many seldom or never collaborating, there is certainly room for improvement, and this is an area to keep a watchful eye on as we move ahead with tighter, more scrutinized budgets and smaller teams.



FIG 5:

## Which of the following best describes how your agency partners work together?



# Most DMOs Lack a Structured A/B Testing Plan



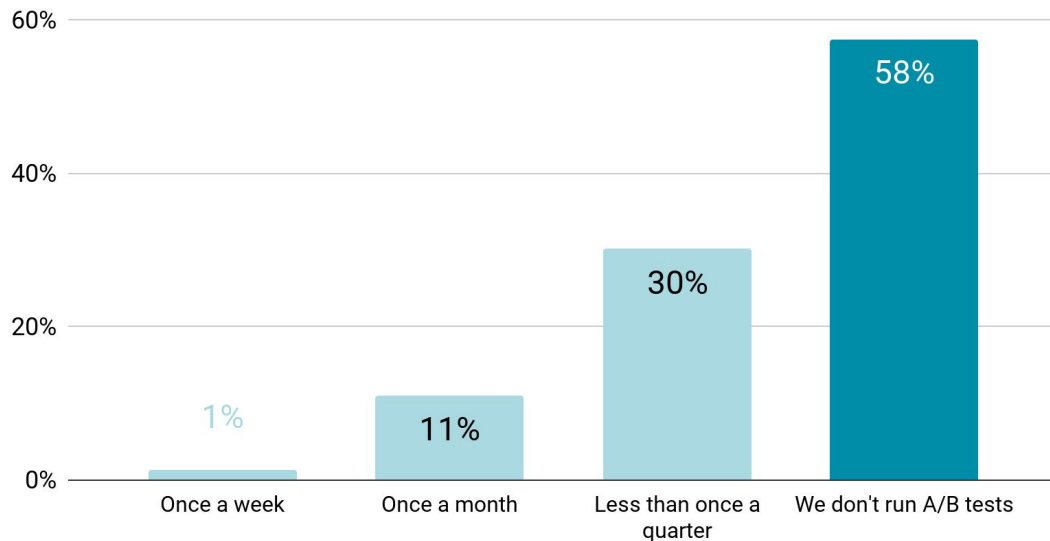
Over the past two years, consumer behavior has experienced shifts triggered by a demand for personalization and the acceleration of digital transformation. Travelers are often overwhelmed by an abundance of information and options, amplified by shorter attention spans to navigate them. This shift in behavior puts a premium on A/B testing the user experience, especially on campaign landing pages. We asked, "How frequently do you run A/B tests?" Surprisingly, 58% of respondents said they do not run A/B tests, specifically on landing pages.

Consumers are increasingly spending more time researching before making a purchase. This is where a DMO fits in perfectly; it is now the task of the modern destination marketer to educate and guide consumers during their research and planning process with content that addresses their needs while providing faster solutions for today's world. Not only will a good testing strategy help a site earn more leads, partner referrals, etc., but it will also ultimately make the site more valuable to its local partners by increasing awareness and influencing visits to the destination.

FIG 6:

## How frequently do you run A/B tests on landing pages?

(select the most relevant option)





# Most DMOs Segment Their Audiences Using Multiple Data Categories

We were encouraged to find that nearly 60% of respondents use two or more audience segmentation approaches to develop more sophisticated personalized campaigns and content for their intended audiences.

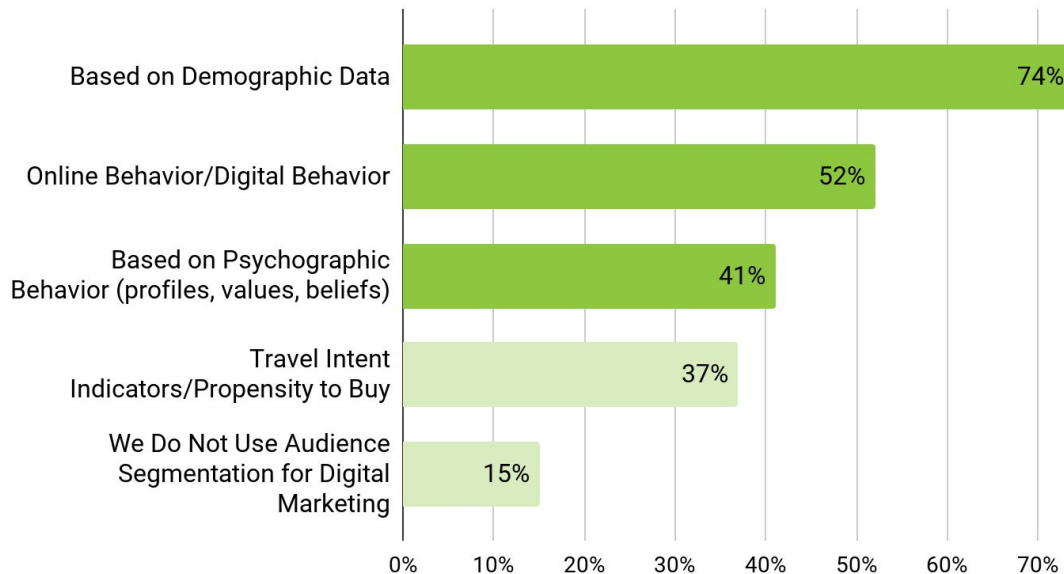
Seventy-four percent of respondents indicated that they segment using demographic data. Fifty-two percent said they also rely on online behaviors, and 41% use psychographics to create segmentation schemas. This segmented approach enables DMOs to deliver more personalized content and create a more compelling overall user experience.



FIG 7:

## How do you currently segment your target audience?

(select all that apply)



# Most DMOs Update Web Content on a **Daily or Weekly** Basis

Your website should be a dynamic entity on the web. The days of static sites are long gone, as evolutionary design principles are now the norm. Every update you make on the site is a potential opportunity to increase search rankings and improve the overall user experience.

Fresh content does not equate to higher indexing, but it does mean your website will be more frequented by search engine bots, which provide an opportunity to achieve higher rankings. With that, it's good to know the majority of DMOs update their web content at least once a month, if not more frequently.

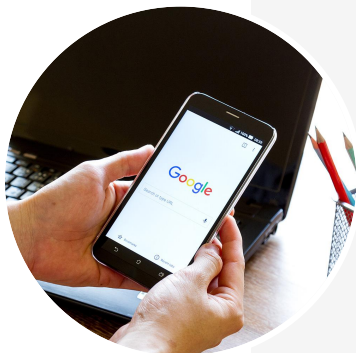
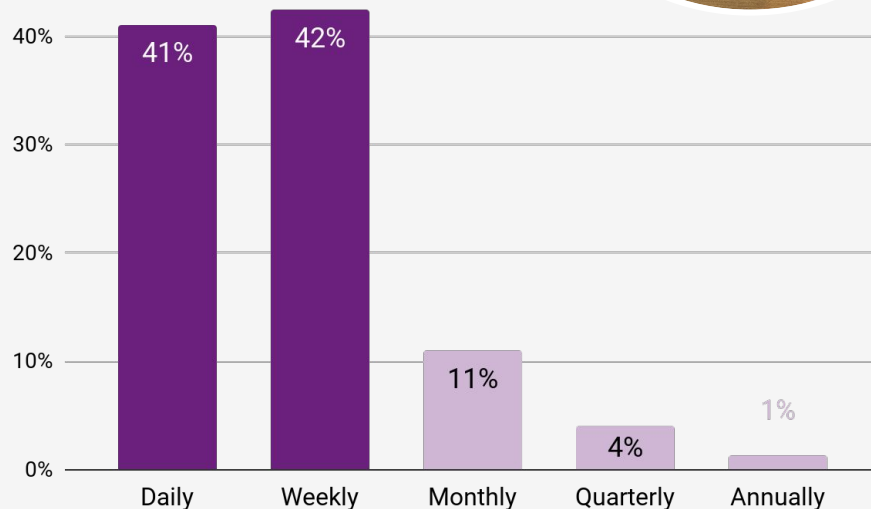


FIG 8:

## How often are you updating content on your website?



# Most DMOs Have Not Created a Customer Journey or Plan for Customizing Content

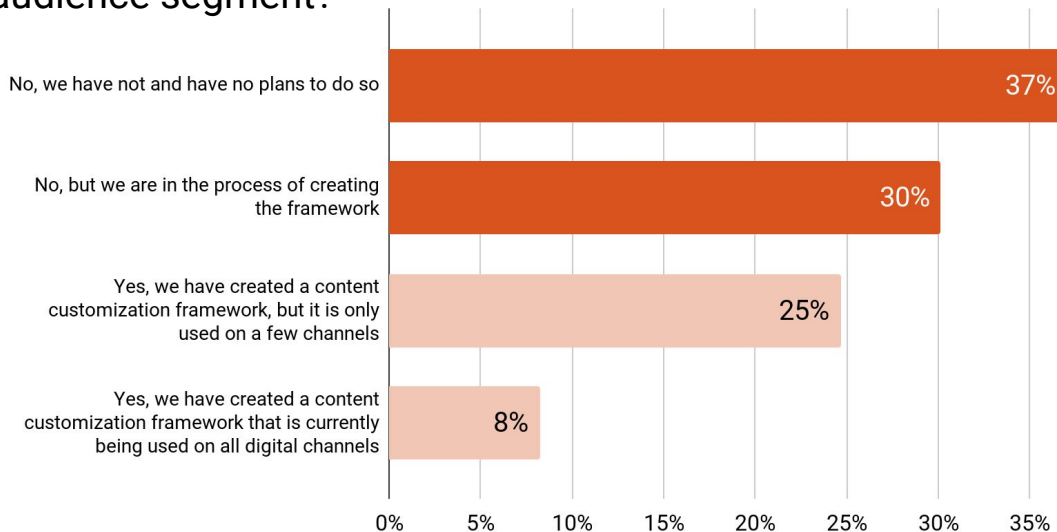
Although content is updated regularly, more than two-thirds of DMOs report they have not created a digital customer journey or plan for personalized content. Although the majority have not created a journey, 30% of this group plan to do so within the next 12 months.

Mapping a customer journey has many benefits for a DMO. For one, it ensures that you are engaging with your audience at every stage of the traveler's journey. From this comes insight into what is working, as well as possible pain points and bottlenecks that create a poor user experience. Armed with this information, destination marketers can deliver better experiences that lead to improved engagement and action.



FIG 9:

## Have you created a content customization framework that specifies what type of content should be delivered to each audience segment?



# Organic Traffic Was Mentioned as the Most Important Channel

At this point, it's safe to say that without a data-driven approach, your marketing strategy won't cut it. The democratization of data and access to information with platforms like Zartico, Symphony, and our Visitor Insights and Destination Dashboards provide a method to integrate measurement and analytics that better inform marketers to make the right decisions rooted in data. Circling back to earlier in the findings, one of the top challenges facing destination marketers was proving the impact of their marketing efforts. So we asked, "Is your organization currently investing in a data measurement tool?" Thirty-six percent said they are currently investing in a data measurement tool; of those that said no, 22% do plan to do so within 12 months.

These tools are certainly helping us get closer to measuring the ROI of our marketing efforts, which has been a challenge for many DMOs to date, being that they have no "cash register" and are informational versus transactional (like an eCommerce website).

We wanted to know which channels DMOs found to be the most effective and/or deliver the best ROI for their digital marketing strategy — respondents listed social media, web content, and SEO as the top three. If they could choose only one channel, organic traffic was listed as the most important to their organization, likely due to improved intent and engagement of this segment.

FIG 10:

Is your organization currently investing in a data measurement tool?

(ie Zartico, Symphony, Destination Dashboards, etc.)

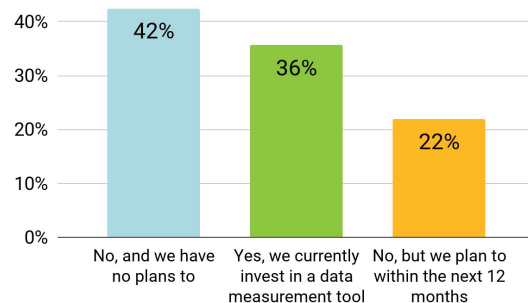


FIG 11:

What digital marketing methods are most effective for your organization?

(check all that apply)

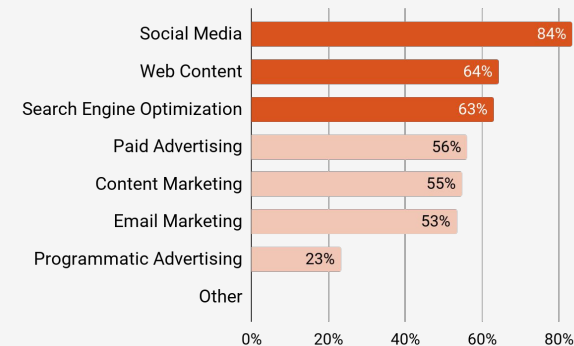
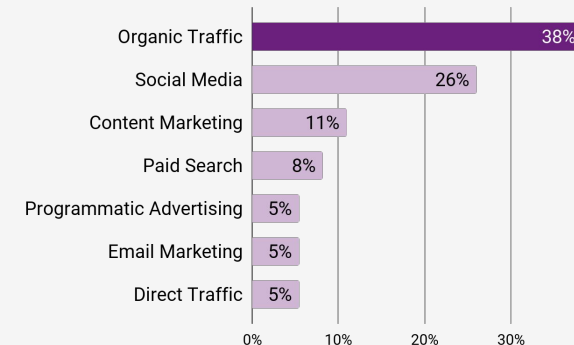


FIG 12:

If you could only choose one, what specific digital marketing channel is most important to your organization?



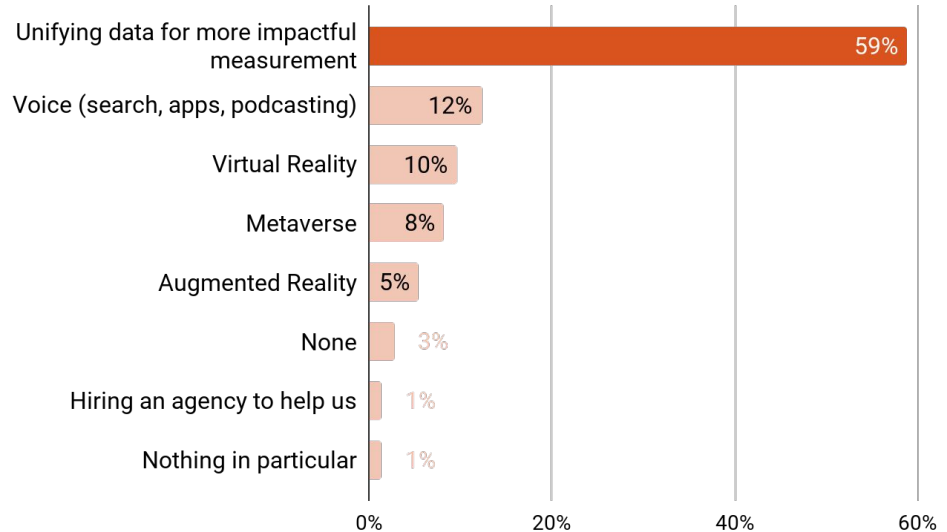
# Unifying Data for More Impactful Measurement is the Innovation that **Most Excites** Destination Marketers

The biggest thing coming down the pipeline that most marketers are excited about is unifying data for more impactful measurement — with nearly 60% of respondents mentioning this as what they are looking forward to the most. This is not surprising because one of the most critical jobs as a marketer is to know your audience and build trust and relationships. It requires destination marketers to consolidate their data across channels and platforms to better measure and analyze the travelers' path to purchase. In doing so, DMOs can create more dynamic user experiences that meet the wants and needs of their customers.



FIG 13:

The biggest thing coming down the pipeline that I'm looking forward to most is...?



# Conclusion: Actions Worth Considering

Based on the survey results, we make the following recommendations to destinations marketers for the coming year:

- **Conduct your own capabilities assessment**

Understanding where you are and the capabilities you and your team currently possess means assessing where you sit on the digital marketing maturity scale. It's easy to be attracted to the next big thing, but first being rooted in a solid foundation is prudent. Every journey should begin with a plan and strategy; understanding your capabilities is the first step on the road to success. Suppose your DMO is shifting focus or changing its digital marketing goals. In that case, it's necessary to first assess your staff, technology, and processes to identify gaps and benchmark capabilities. Until you identify where you are and what is needed, the path to meeting your marketing goals will be difficult to navigate.

- **Invest in a customer-centric data strategy**

DMOs at all levels of data maturity are investing in analytics and marketing methods to personalize and improve the customer experience. Throughout this survey, it became clear that data has emerged as one of the biggest priorities for destination marketers. Using data to craft a more compelling narrative that connects with travelers is core to what we do as destination marketers.

- **Align goals and metrics across the organization**

In recent workshops, we have noticed more frequently the challenge of developing meaningful marketing metrics, KPIs, and objectives. Additionally, the lack of sharing those to better inform and align teams across an organization is a concern worth mentioning. If your DMO focuses solely on generating digital marketing awareness metrics, now may be the time to start exploring other digital marketing goals. Constrained budgets, staff shortages, and the pressure of proving marketing value mean it might be time to evaluate whether your organization needs digital marketing to play a more significant and prominent role than it may have traditionally.

- **Create a culture of testing**

For every \$100 spent on driving traffic to a website, only \$1 is spent optimizing that traffic to complete the desired actions you're looking for. Ask yourself, "What is the purpose of my website, and what do I want visitors to do once I drive them there?" Create a culture of testing within your DMO to take the guesswork out of user experience and get to the root of what your travelers really want. Evolving your approach around the customer journey will help focus your destination's content and marketing strategies.

- **Privacy must be kept top-of-mind**

[Gartner](#) recently predicted that 65% of the world's population will have its personal data covered under some form of privacy regulation by 2023, up from 10% in 2020. Recent iOS updates, the coming deprecation of cookies and the increasing importance of first-party data are reminders that the space is continually changing and evolving. Becoming familiar with the privacy regulation landscape ensures you are prepared for the future.

- **Chart a plan for scaling marketing innovation**

Pre-pandemic, no one expected we would have to completely reevaluate our marketing strategies or redefine our processes for engaging and connecting with our audiences. Suddenly, we all had to ask, "Are we getting the most out of our website? Do we need a unified data platform? Are we properly leveraging marketing automation? How do all of these systems work cohesively?" Marketing technology allows DMOs to be efficient and effective; it is especially valuable as we deal with resource and staffing challenges. Charting a plan to better leverage marketing technology will pave the way for innovation and growth, which in turn will ensure that your team can maximize your marketing budget, adapt to change more quickly, and better demonstrate your marketing contribution to your overall visitor economy.

# Other

**Methodology:** We surveyed 74 destination marketing executives and practitioners across North America (70%) and Europe (30%). The survey consisted of 40 questions broken across three categories: organization and strategy, audience and content, and attribution and measurement. The survey consisted of multiple-choice and single-response questions centered around leisure digital marketing activities.

**Approach:** This survey and subsequent report were funded entirely by Simpleview with the purpose of fostering a community of transparency and advancing the industry at no cost. The report is for you to read, utilize, and share with others within the industry. In doing so, we would appreciate attribution to Simpleview, Inc.



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# About the Author



**JASON SWICK**  
VP of Strategy and Insights  
Simpleview

As vice president of strategy and insights, Jason Swick combines creativity, data, and technology to develop strategic marketing programs for Simpleview clients worldwide. With over a decade in the tourism industry, Jason has a proven track record of delivering effective marketing strategies that help destination marketing organizations (DMOs) deliver on their key business objectives and goals.

At Simpleview, Jason manages a team focused on providing clients with the data and insights they need to better connect the dots and extract actionable insights leading to more effective campaigns, contests, promotions, and always-on marketing.

Jason is also the host of Simpleview's award-winning digital marketing web series, [The Layover Live](#), bringing digital marketing news and actionable insights to hundreds of DMOs every other week. Jason holds a Bachelor of Science degree in Small Business Administration from Northern Arizona University.



Simpleview is a leading provider of CRM, CMS, website design, digital marketing services, and data insights for convention bureaus, venues, tourism boards, destination marketing organizations (DMOs), and attractions. The company employs staff across the globe, serving clients of all sizes, including small towns, world capitals, top meeting destinations, and countries across multiple continents.

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