



State of Destination Marketing 2025

A global overview of the state of digital marketing for destinations in 2025.



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CHAPTER 1

The State of Destination Marketing Today

In this chapter, we'll uncover the exciting transformation happening in destination marketing. Today, it's no longer just about promoting attractions—it's about reimagining how destinations engage with travelers and contribute to their communities. Leading destination marketing organizations (DMOs) are embracing bold strategies to balance visitor satisfaction, economic growth, and local well-being.



Tourism with Purpose

Destination marketing is undergoing a major transformation. Traditional approaches of widely promoting top attractions are being replaced by more sophisticated strategies as DMOs take on the role of destination stewards. This shift creates new opportunities to shape visitor experiences and contribute to the civic and economic health of destinations globally.

At its core, destination marketing is about telling the right story—one that both aligns with local priorities and resonates with visitors—to drive long-term impact. A strong destination brand attracts travelers while fostering pride and purpose among residents, businesses, and stakeholders. By reshaping perceptions and addressing outdated narratives, destination marketers lay the groundwork for economic growth and a better quality of life for all.



DMO PERSPECTIVE

Charel van Dam

Marketing Director at the Netherlands
Board of Tourism & Conventions

“By 2030, UNWTO predicts the Netherlands will see 60 million domestic and international visits. For a country of just 18 million people, that’s overwhelming. How do we manage this? This realization shifted our focus from quantity to quality. And while many destinations talk about quality tourism, for us, it means asking what tourism needs to do to truly benefit our country. Our ultimate goal is simple: by 2030, tourism should benefit every Dutch citizen.”

Start with **Good Storytelling**

Jennifer Walker, CMO at Visit Dallas, shared how strategic storytelling has shaped her work, including the inspiration behind Dallas' bold new branding: Dallas – A Maverick, Can-Do Spirit.

"When I joined Visit Dallas three years ago, one of our top priorities in our strategic plan was to establish a unified destination brand. In 2024, we launched that brand, and it's something I'm incredibly proud of. This is much more than a logo, tagline, or campaign. Our goal was to address the outdated perceptions of Dallas.

When people think of Dallas, they typically think of three things: the soap opera from the 1980s, the Dallas Cowboys, and maybe JFK. But beyond that, we've heard time and again, 'We don't know why we'd visit Dallas for leisure or a meeting.' Many people see it as a big city without much else beyond cowboy stereotypes.

So, we set out to create a brand that would resonate far beyond tourism. This unified destination brand is something the entire city can adopt—not just Visit Dallas but also economic development teams, residents, and others—to build lasting equity and establish Dallas as a premier destination for years to come.

Destination marketing has a profound impact on the entire community. There's a concept often referred to as the 'Community Vitality Wheel,' which all starts with a visit. Most people don't move to a destination they haven't visited first. By creating interest and bringing visitors here, we stimulate commerce, create jobs, and

generate state and local tax revenue. Ultimately, our role at Visit Dallas is to be an economic engine—one that not only drives tourism but also enhances the quality of life for everyone who lives, works, and plays here."



Destination Marketing **Brings Communities Together**

Danielle Hollander, CMO at Visit Orlando, highlights how tourism serves as a powerful catalyst for both community growth and unforgettable visitor experiences.

"What we do as destination marketers goes beyond promoting a place—we're creating opportunities for people to focus on their families, connect with colleagues, take a break from daily life, and simply have fun while making memories. That's what motivates me and my team every day—the joy we help bring to people's lives.

We see the incredible impact tourism has on our community. As a membership organization with 1,600 members—65% of them small businesses—we hear stories that remind us why our work matters. Like a Puerto Rican restaurateur featured on Somebody Feed Phil, who expanded his hours and staff to meet

demand while proudly sharing his culture through food. Or the Black Bee Honey program teaching entrepreneurship to kids, now shipping to 29 states.

Tourism touches everyone, from the people working in hotels to the florists who serve them. Visitors generate 50% of our sales tax revenue, supporting livelihoods across the community.

While our mission is to create economic well-being and jobs, it's these personal stories and real impacts that show the heart of what we do."



How Leading DMOs Are Balancing Awareness & Action

Building on the popularity of our inaugural 2024 research—an essential benchmarking guide and planning tool for global tourism leaders—this year's study examines how destination marketing continues to evolve. With participation from nearly 200 organizations, including many of the world's leading DMOs, this report provides unique insights into how destinations are balancing building brand awareness with the precision of digital marketing.

A clear pattern has emerged: successful destinations are adopting a dual approach. On one side, they define and establish brand positioning they can own in the minds of visitors, local stakeholders, and developers. On the other, they employ sophisticated digital tools to deliver precisely targeted messages to the right audiences at the right time. This "barbell strategy" represents the future of destination marketing, enabling DMOs to simultaneously build awareness while driving specific, desired outcomes.

We want to give you the clearest picture possible, so we've removed responses from participants who answered "not sure" or chose not to respond. This ensures the data reflects only definitive insights, giving you a sharper view of industry sentiment and emerging trends. Based on our research and analysis, this report examines:

- ▶ How DMOs are merging creativity with data-driven strategies
- ▶ Shifts in traveler behavior and digital innovation
- ▶ The hurdles DMOs face adapting to new technologies and expectations
- ▶ How DMOs can use emerging trends to shape their marketing

Keep reading to uncover actionable insights and recommendations to strengthen your destination marketing strategy.

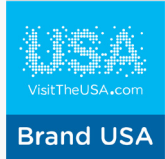
DMO PERSPECTIVE

"We've had to find how to use both high-level brand positioning and the precision of targeted digital marketing. Our focus is on visitor dispersal—getting the right person, at the right time, to the right location. We know our target audiences well and what they're looking for. Digital marketing helps us target these specific audiences with tailored messages that match their interests and encourage them to discover lesser-known parts of the Netherlands. It's about blending strategic branding with actionable insights to guide people to the right places at the right time."

Charel van Dam

Marketing Director, Netherlands
Board of Tourism & Conventions

Supporting Partners



"The latest State of Destination Marketing report is an essential resource for destinations seeking to adapt to the evolving travel landscape. This year's findings shed light on key marketing trends and the pressing issues DMOs are addressing today."

Cassady Bailey

VP, Partner Engagement & Marketing, Brand USA



"This year's study shows not just where destination marketing is today but where it is heading. It reflects the transformative power of innovation and collaboration, providing us with insights to redefine the possibilities of travel while staying attuned to the needs of both travelers and local communities. Together, we are shaping a future for tourism that is both sustainable and inspiring."

Miguel Gallego

Head of Marketing & Communication, European Travel Commission



"This report underscores the vital role of DMOs in the new era defined by data and AI. By providing accurate, curated information, we can help travellers discover hidden gems and ensure a more balanced distribution of visitors. AI is giving us new ways to leverage this information, enabling us to have a conversation with the data and unlock insights that would have previously remained hidden, informing every aspect of the traveller's journey."

Meaghan Ferrigno

Chief Financial Officer & Chief Data and Analytics Officer,
Destination Canada



"Digital marketing continues to be a transformative tool for destination marketing, especially in the Caribbean. By leveraging strategies such as programmatic advertising and location-based data, we can attract the right visitors, craft personalized and memorable experiences, and showcase the unique culture of our destinations. These efforts not only drive tourism growth but also strengthen the economic and cultural richness of our communities."

Aliyyah Shakeer

Director of Research, Caribbean Tourism Organization

CHAPTER 2

What Our Research Revealed

In this chapter, we'll explore the key trends shaping the industry, like the growing use of programmatic advertising, social media's continued dominance, and the potential of tools like AI and location data. Digital strategies are evolving; misaligned KPIs and limited personalization options are challenges that offer marketers the chance to evolve also.

Together, these insights provide a roadmap to help you refine your approach and make a bigger impact.



The Power of Digital to Showcase Your Destination's "Why"

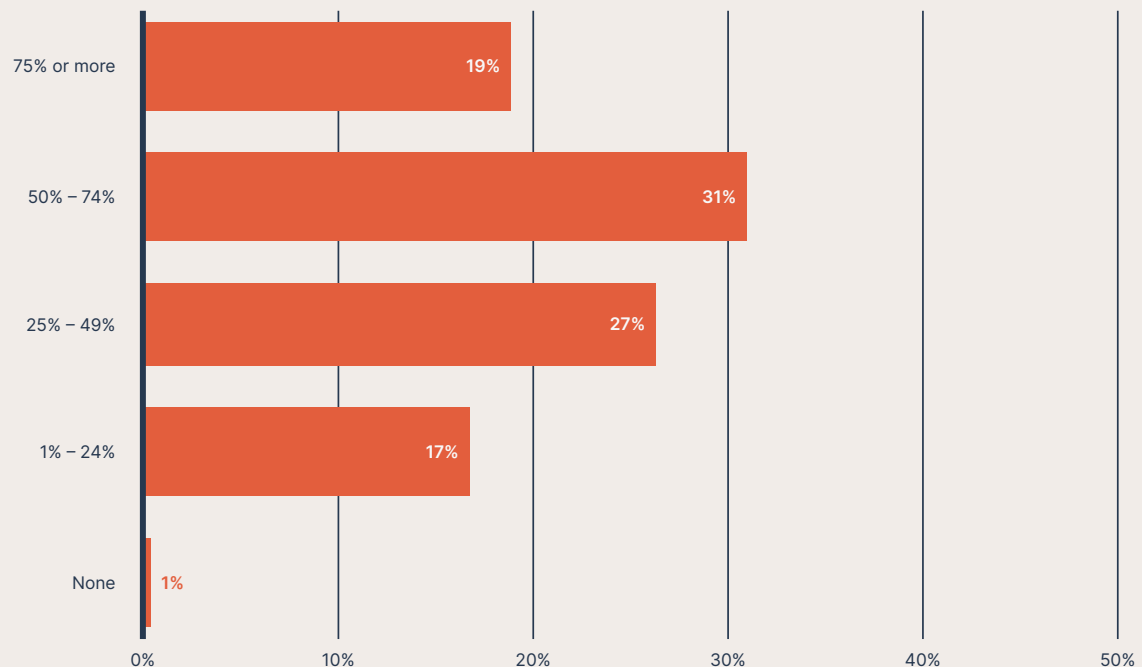
Digital advertising remains central to destination marketing. Nearly all participants in our study use it (99%), and half of our study respondents reported allocating more than 50% of their total marketing budgets to digital advertising.

Jennifer Walker, CMO of Visit Dallas, shares how digital marketing has helped her team showcase Dallas' rich diversity and unique stories: "Digital marketing is essential for us because it allows us to tell deeper, richer stories that traditional advertising, like static print ads or short video spots, simply can't. That's always been the challenge for me as a marketer. Dallas is complex—it's not a place you can sum up with a generic tagline. We have over 20 diverse neighborhoods, each with its own distinct character. Digital lets us showcase these unique stories and explain the 'why' behind Dallas, keeping us top of mind while fueling active consideration. It's a nimble, cost-effective medium that's perfect for telling the Dallas story of today in a way traditional advertising can't match."

This year's study takes a closer look at how DMOs use digital tools to work together and drive meaningful results.

In this section, we'll give you an overview of the key findings, with more details to dive into later in the report.

What Percentage of Your Total Marketing Budget Is Allocated to Digital Advertising?



**Excludes respondents who answered "Not sure / decline to answer"*

Key Takeaways from Our Research



Digital Advertising Remains Resilient

A striking 85% of DMOs are maintaining or increasing their digital advertising budgets compared to last year. Even in Europe, where budgets have faced greater pressure, 72% of organizations either maintained or increased their allocations.



Misalignment Exists Between KPIs and Organizational Goals

A notable gap exists between the KPIs destination marketers prioritize (e.g., clicks and content engagement) and their organization's broader goals (e.g., bookings and tax revenue). This misalignment suggests an opportunity to better connect digital marketing tactics to strategic objectives.



Shift in Campaign Structuring Reflects Evolving Strategies

Study participants were evenly split between focusing on stage-specific (50%) and full-funnel (50%) campaign approaches this year, compared to 30% on stage-specific and 70% on full-funnel last year.



Programmatic Advertising Is Widely Used

An overwhelming 83% of DMOs in our study use programmatic advertising, often because of its trackability and cost efficiency—allowing them to clearly demonstrate the value of their advertising investments.



Co-Op Marketing Gains Momentum

Co-op marketing continues to grow in popularity, particularly in Europe, where participation increased among study respondents year over year from 75% to 87%. This reflects how budget constraints can be addressed through strategic partnerships.



Social Media Continues to Dominate

Social media is a cornerstone of digital advertising, with 91% of respondents using it and 92% ranking it among their most important channels. Meta platforms Facebook and Instagram dominate social media marketing, ranking among the top five most important channels for 99% of our survey participants.



Advanced Personalization Hasn't Gained Widespread Adoption

While many believe personalization represents the future of advertising, only 15% of respondents reported using advanced or hyper-personalization techniques today.



Location Data Emerges as a Key Opportunity

Nearly half of DMOs in the study reported using location data to improve targeting and measure performance, positioning it as a significant emerging opportunity for marketers.



AI Usage Is Prevalent, Especially in Content Creation

AI adoption is widespread among destination marketers, with 63% using it for content creation. However, only 28% report using AI for data analysis and insights, indicating an opportunity in the industry.



Video Poised to Dominate the Future of Digital Advertising

Video is expected to play a critical role in 2025, with short-form video and streaming/connected TV (CTV) ads identified as the two most important emerging formats by study participants.

DMO PERSPECTIVE

Danielle Hollander | CMO at Visit Orlando

“The power of digital marketing lies in its ability to deliver the right message to the right person at the right time—something traditional channels like print, radio, and linear TV struggled to achieve. While all channels have their place in the marketing mix, digital marketing has evolved beyond its traditional role in the lower funnel. Today, it plays a critical role at every stage—from inspiration to conversion—allowing marketers to communicate in personalized and meaningful ways that resonate with audiences.”

CHAPTER 3

Challenges in Digital Marketing

From juggling the complexity of multichannel campaigns to meeting the needs of various stakeholders, DMOs are under constant pressure to deliver meaningful results. But with every challenge comes an opportunity—whether it's using data more effectively, aligning KPIs with bigger goals, or embracing tools like AI and programmatic advertising. In this chapter, we'll look at how DMOs are tackling these hurdles head-on and transforming obstacles into opportunities for growth and success.

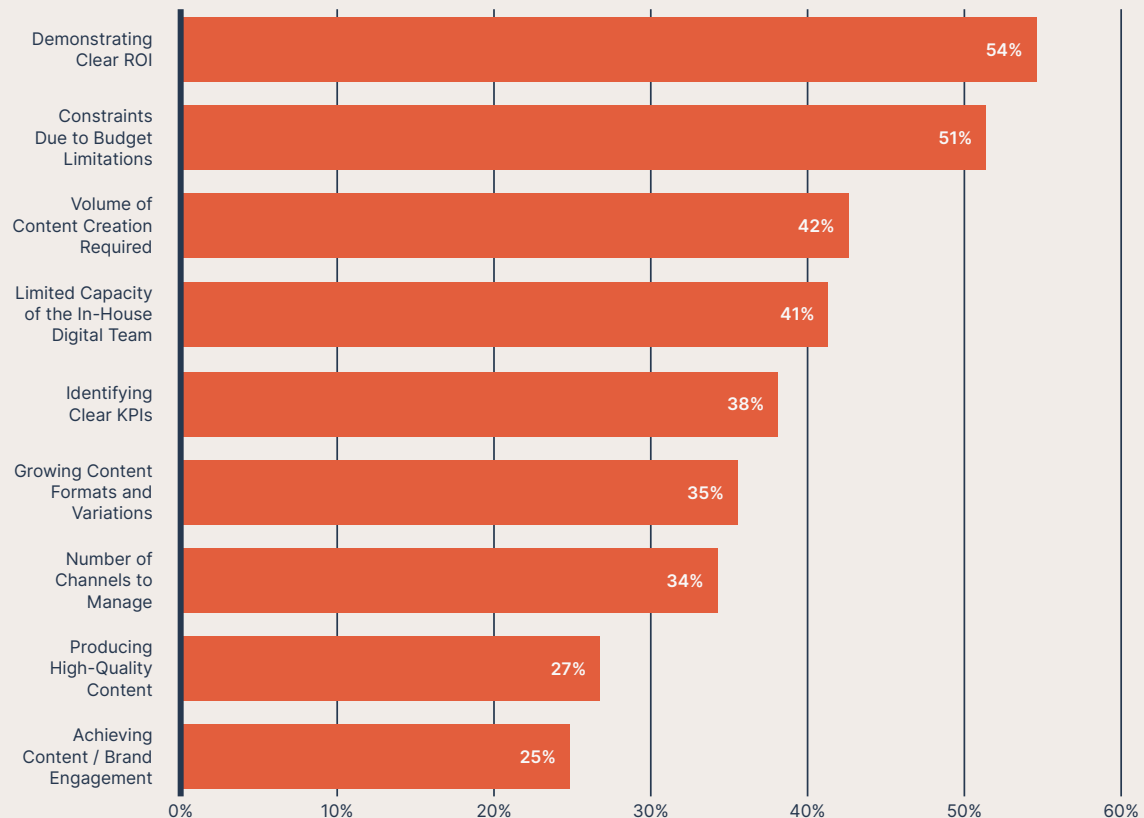


When the Stakes Are High, DMOs Get Creative

Working at the intersection of many competing interests, destination marketers are no strangers to challenges. Yet, the hurdles facing DMOs in digital marketing today are uniquely complex. With shrinking budgets, rising expectations, and rapid technological change, the stakes have never been higher. To better understand this, we asked our participants to share their top challenges.

Working through these challenges requires careful balance: managing limited resources while showing clear results, adopting new tools while closing skill gaps, and building brand equity while delivering quick wins. These issues show both the difficulties DMOs face and the opportunities to innovate, work together, and redefine their role in contributing to the well-being of a destination.

What Are the Main Challenges You Have With Your Digital Marketing Strategy?



*Excludes respondents who answered "Not sure / decline to answer"

Demonstrate **Clear ROI**

DMOs in our study cited demonstrating ROI as their most common challenge, highlighting the need for more robust analytics tools and frameworks to connect marketing efforts with measurable outcomes. Without the ability to show ROI, DMOs risk losing stakeholder confidence and, ultimately, funding.

Attribution in destination marketing is a significant challenge as most DMOs don't have a 'cash register' to tie results directly to revenue, making demonstrating ROI one of the biggest hurdles DMOs face. The approach to attribution often varies depending on how close a destination is to the point of conversion. For instance, Destination Canada employs a comprehensive strategy that includes closed-loop attribution, causal impact studies, and other methodologies to measure performance and showcase the impact of their work, according to Meaghan Ferrigno, CFO & Chief Data and Analytics Officer at Destination Canada.

Ashley McHugh, Senior Director of Research at Memphis Tourism, pulls back the curtain on one of the biggest hurdles for DMOs—cracking the code on attribution and proving how marketing efforts truly impact real-world results: "One of our biggest challenges is walled gardens, like Facebook and Google, where you can't place third-party pixels to measure or track across platforms. Pixels are critical for understanding digital marketing performance, tracking ad-influenced visitation, and targeting ad spend. Without them, it's harder to measure the impact of spending on these platforms, even though we realize they're essential. We know people searching for Memphis need to be driven to our website, but proving that SEM leads directly to arrivals or hotel bookings is a challenge. Bridging the gap between activity metrics and actual impacts on the destination remains a constant balancing act."

What is the Most Challenging Aspect of Managing a Full-Funnel Marketing Approach?



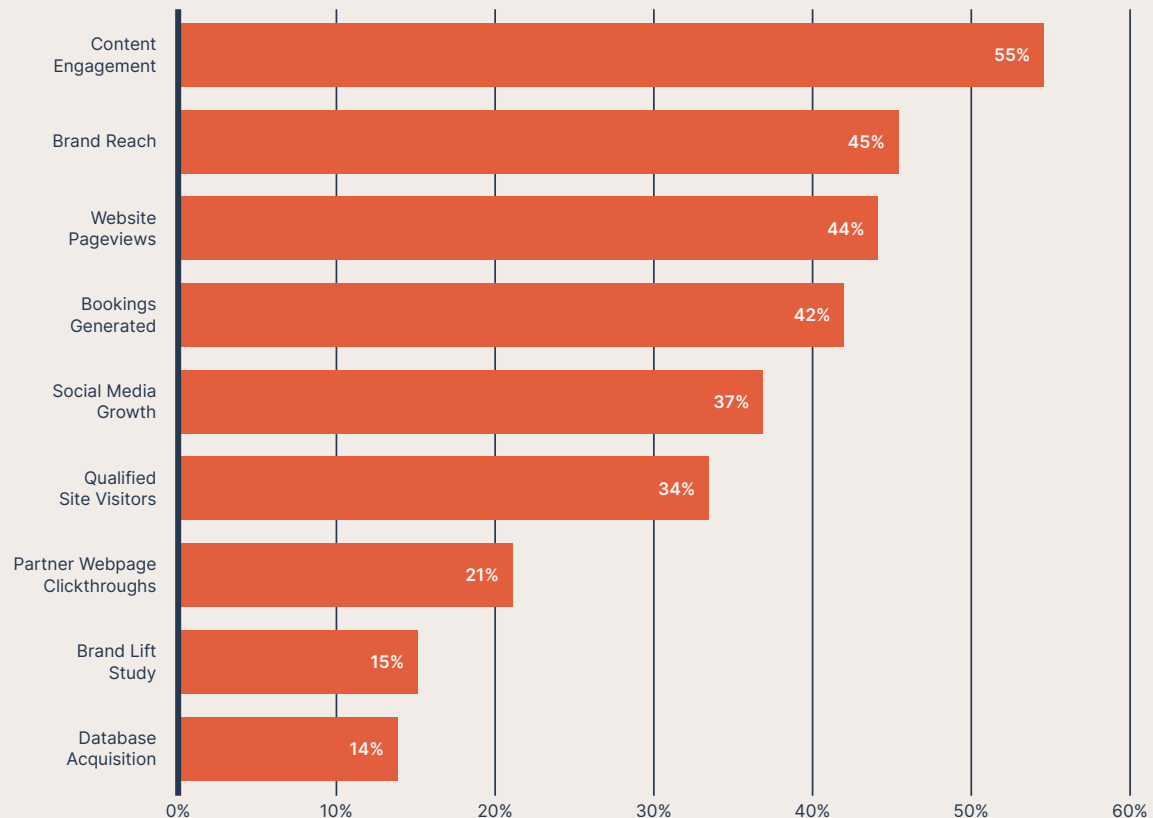
**Excludes respondents who answered "Not sure / decline to answer"*

Aligning KPIs with Strategic Goals

There is often a gap between the metrics destination marketers focus on—such as clicks and engagement—and the broader goals for their stakeholders, like bookings, tax revenue, and resident satisfaction. This became clear when we asked about strategic goals in our survey, and then compared the results with the insights gathered through our interviews.

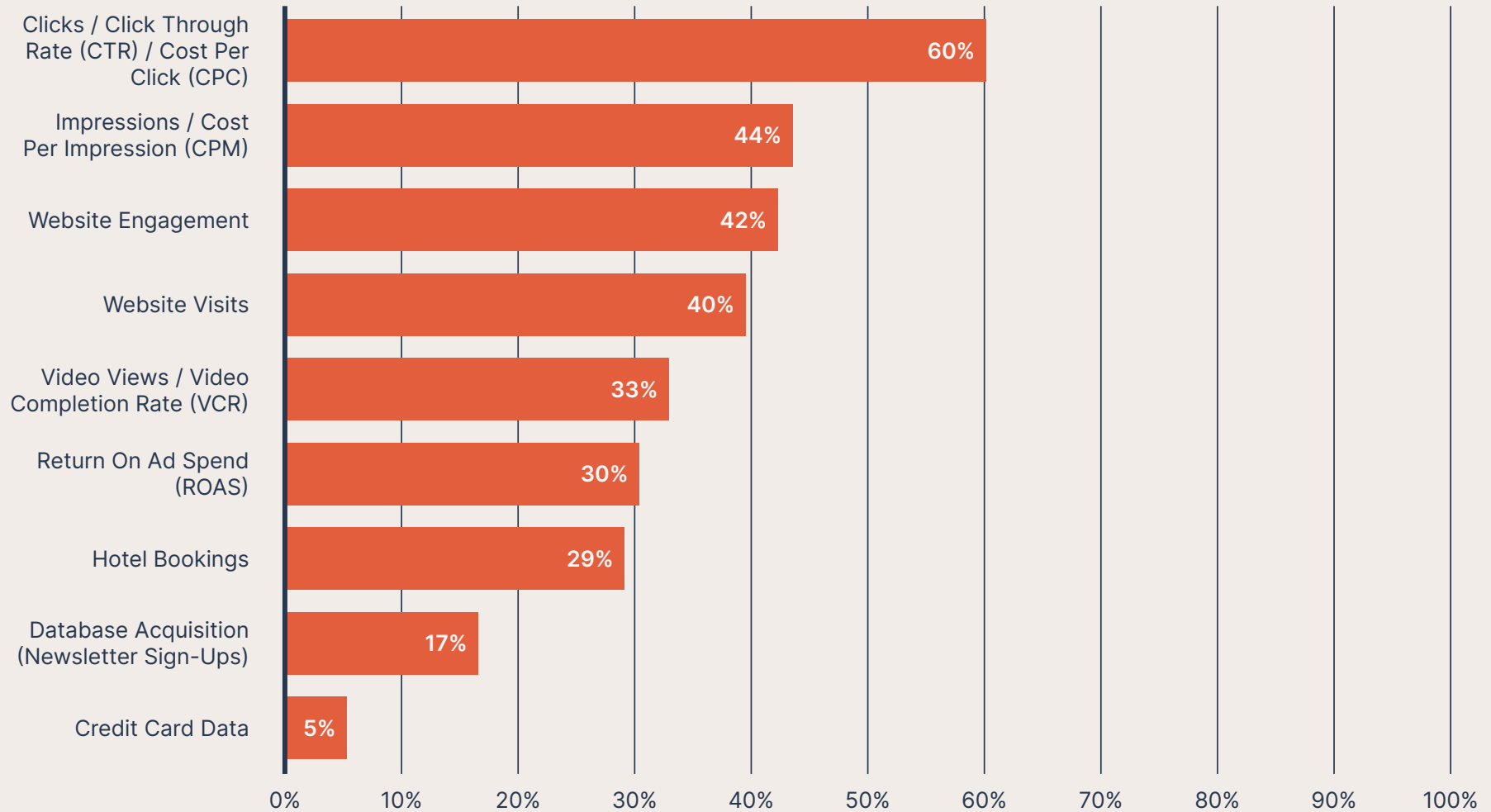
While clicks and impressions are easier to measure, they don't always reflect the success of a campaign in achieving tangible outcomes. This makes it harder for DMOs to justify their efforts and demonstrate their value. Bridging this divide requires clearer alignment between digital KPIs and organizational priorities.

Which of These Strategic Goals is Most Important to Your Organization?



**Excludes respondents who answered "Not sure / decline to answer"*

What Are the Top 3 KPIs You Use to Define Your Success in Your Digital Advertising Campaigns?



**Excludes respondents who answered "Not sure / decline to answer"*

Analyzing Data Effectively

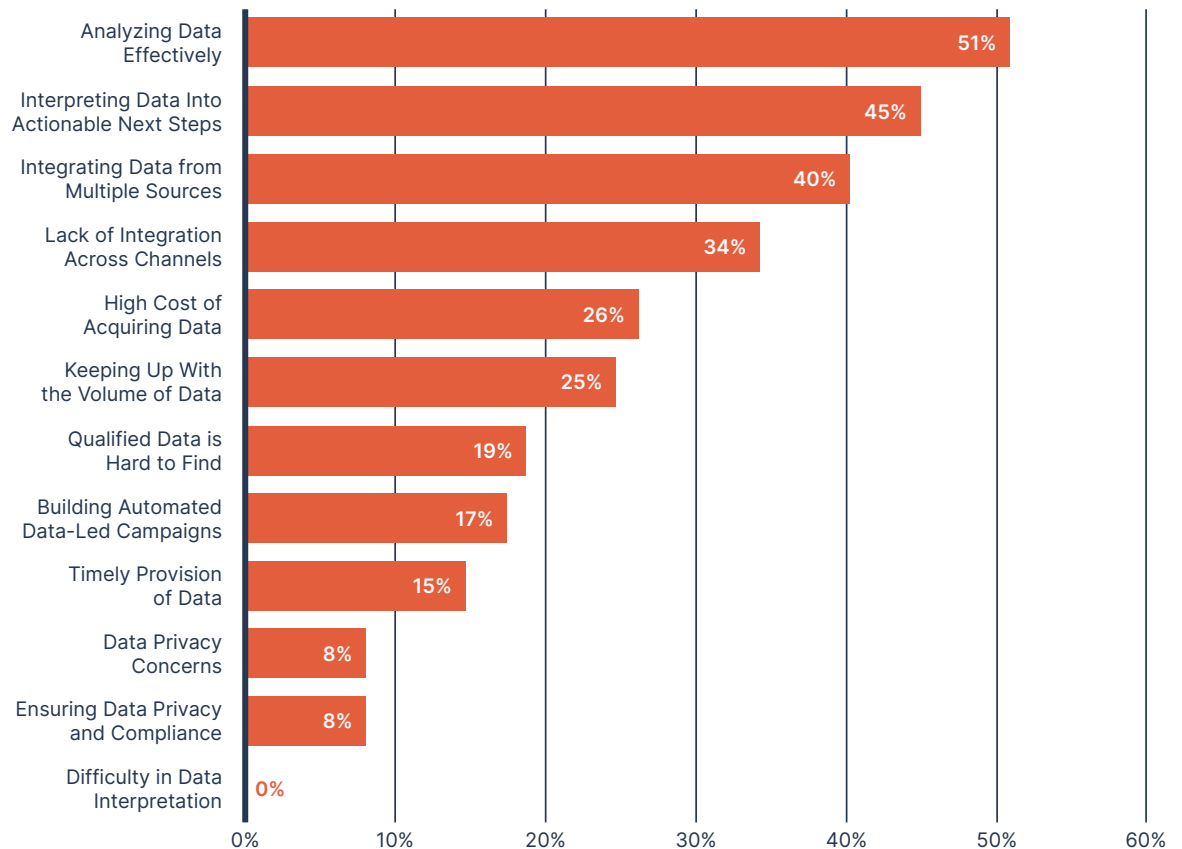
Data is one of the most powerful tools in a destination marketer's toolkit—but it's also one of the hardest to manage.

Our study found that 51% of marketers struggle with data analysis, while 45% find it difficult to turn that data into actionable strategies. Why? For many, the hurdles lie in keeping up with the sheer volume of data or integrating insights across multiple channels.

51% of DMOs report that they struggle with effective data analysis.

It's not just about having data—it's about making it meaningful, whether it's turning raw numbers into clear next steps or ensuring that your insights align with organizational goals.

What Are Your Top 3 Primary Challenges When Using Data in Your Marketing Campaigns?



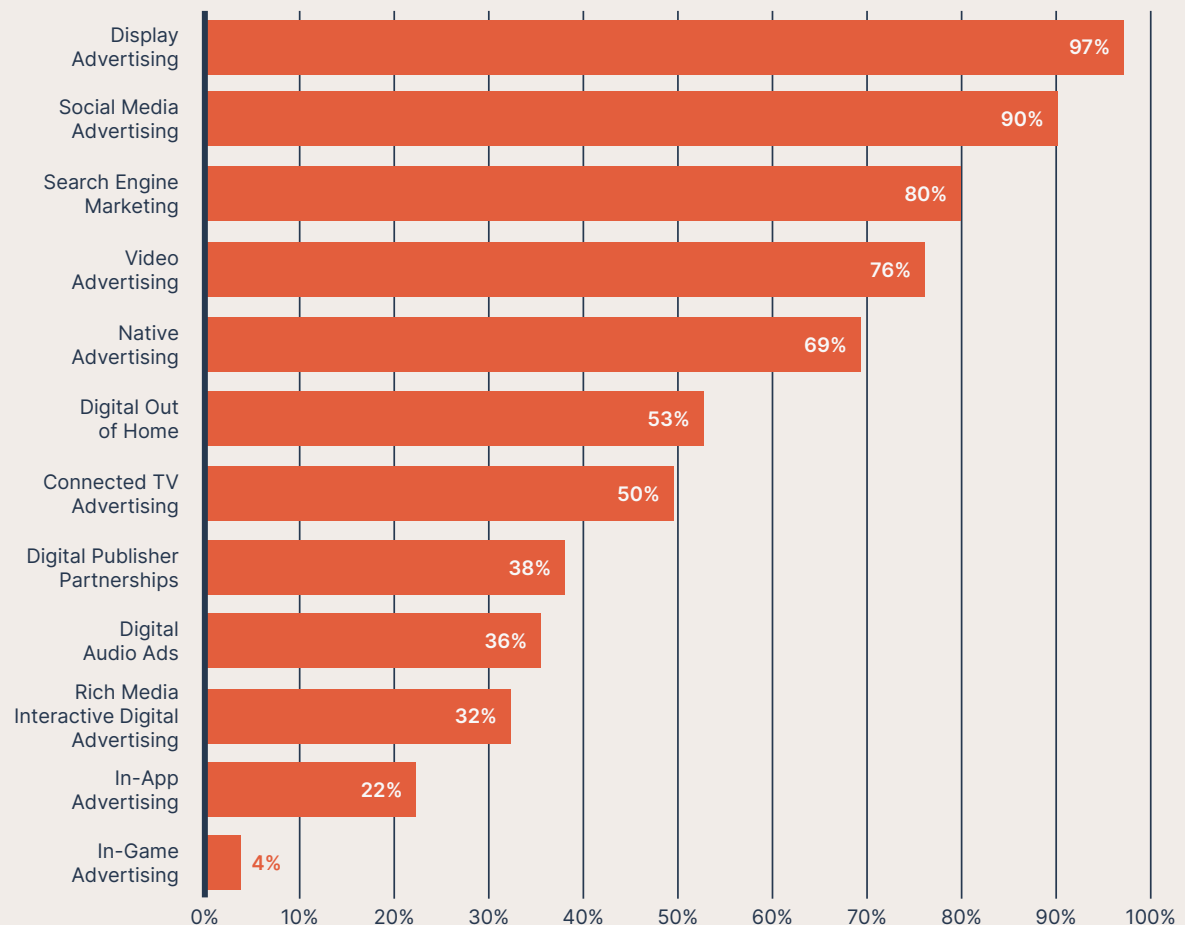
**Excludes respondents who answered "None of the above"*

Navigating Multichannel Complexity

Running campaigns across multiple platforms requires careful coordination. The sheer number of moving parts makes maintaining consistency across channels difficult.

Danielle Hollander, CMO at Visit Orlando, explains how her team carefully balances campaigns that drive immediate actions with those that shape how people see the destination: "Every dollar in marketing is precious, so we need to make them work as hard as possible. Linear TV still delivers the broadest reach, and we see that reflected in our return on ad spend. But we always emphasize that it's not one channel driving results—it's the combination of channels working together. Some campaigns focus on performance, driving immediate actions, while others aim to change perceptions. For those, we don't necessarily expect someone to act right away; it's about shaping how they see the destination."

Which Channels Are Included in Your Paid Media Strategy?



*Excludes respondents who answered "Not sure / decline to answer"

Managing **Growing** **Workloads**

For many DMOs, there's a significant gap between the work to be done and the people to do it. Beyond creating and managing campaigns, small teams are also responsible for detailed tracking, actionable reporting, and responding to stakeholder expectations. New channels, platforms, and technologies only add to this strain. Many teams are stretched too thin to keep up, underscoring the need for technology, streamlined workflows, and reliable partners to help them manage their workload while delivering results.

DMO PERSPECTIVE

Danielle Hollander | CMO at Visit Orlando

"I think the challenge for every marketing team is just keeping up. The demand for content is enormous—now we need vertical videos, now we need this, now we need that, and everything has to be in a different format. It's a constant race to meet those needs."



Addressing **Multi-Stakeholder Demands**

Destination marketers face increasing pressure to keep a wide range of stakeholders satisfied—visitors, residents, and local businesses each have their own needs. Many DMOs must manage visitor flows carefully to avoid overtourism while showing clear economic benefits for local communities.

For Jennifer Walker, CMO at Visit Dallas, the toughest part of the job isn't the marketing—it's juggling the daily demands and requests from stakeholders: "Honestly, the biggest challenge isn't the marketing itself—it's the day-to-day demands. My team is often in constant reaction mode, addressing requests from external forces like elected officials, economic development teams, board members, or local media. Sometimes, that leaves less time than I'd like to focus on external marketing efforts because we're responding to internal needs."

Destination marketers face growing pressures with limited budgets, rising expectations, and rapid change. Challenges such as aligning KPIs with their mandates, proving ROI, managing multi-channel campaigns, and leveraging data

underscore the complexity of their work. Yet, these hurdles also offer opportunities for innovation and collaboration, enabling DMOs to shape the future of their destinations, as we explore in the next section.



CHAPTER 4

Opportunities Today & in the Future

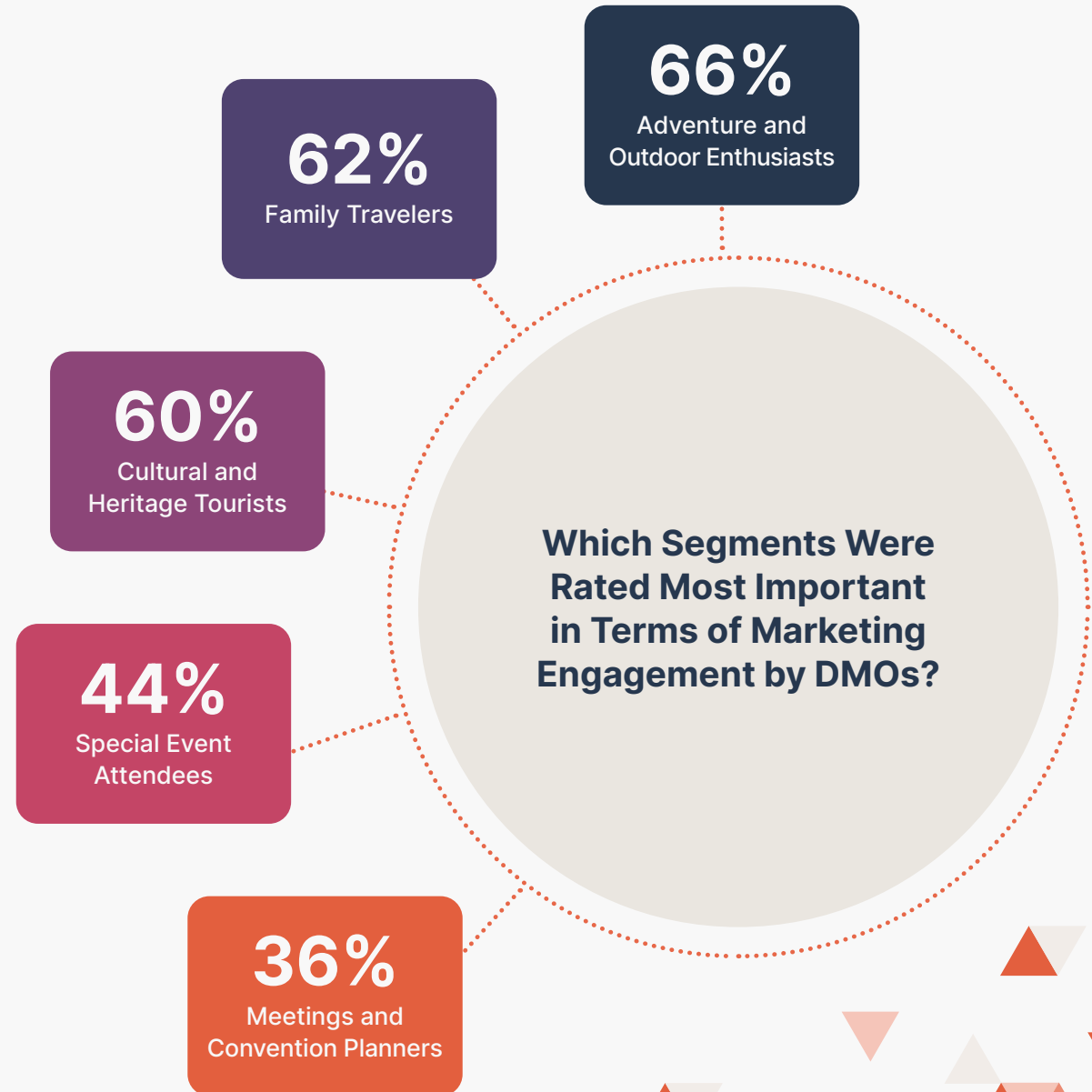
DMOs now have exciting opportunities to innovate through digital marketing. In this section, we review emerging bright spots from our research and interviews, giving you actionable insights to shape your destination's future.



Engaging **High-Value Audiences**

Destination marketers are more focused than ever on creating campaigns that speak directly to important audiences. Globally, adventure and outdoor enthusiasts are the top priority, followed by family travelers. The picture shifts depending on the region, however, with cultural and heritage travel taking the lead by a wide margin in Europe. It's all about meeting travelers where they are and tailoring strategies to match their unique interests and needs.

There is no one-size-fits-all approach to audience targeting, as destinations tailor strategies to their specific needs and goals. For example, Memphis Tourism groups visitors by demographics and location before focusing on understanding their travel interests or other psychographic trends. Visit Dallas, on the other hand, uses persona-driven strategies to understand and connect with specific audience profiles. These methods show that successful targeting comes from working off your goals and insights.



SUCCESS STORY

VisitPITTSBURGH

Targeted Digital Advertising Drives Engagement from Key Audiences for VisitPITTSBURGH

VisitPITTSBURGH saw the opportunity to boost awareness, hotel bookings, and economic impact by focusing on key segments it had compelling offerings for: travelers drawn to its vibrant arts institutions, nationally recognized culinary scene, legacy sports team, and outdoor adventures, in addition to highlighting being recognized as a top destination by USA Today.

Together with Sojern, VisitPITTSBURGH launched a digital advertising campaign that used travel intent signals to target these audiences of U.S. travelers early in the planning cycle. By combining affinity and keyword contextual targeting with real-time travel data, they delivered tailored messages that inspired these travelers to visit.

KEY RESULTS

\$1.43M

in estimated
economic impact

1,212

hotel bookings

19:1

return on ad spend
(ROAS)



Leveraging **Always-On** Campaigns

Always-on campaigns remain a crucial strategy for DMOs to build consistent brand awareness and stay top-of-mind for potential travelers. As tracking challenges such as cookie deprecation loom, maintaining a persistent presence helps ensure ongoing visibility across the traveler's decision-making journey.

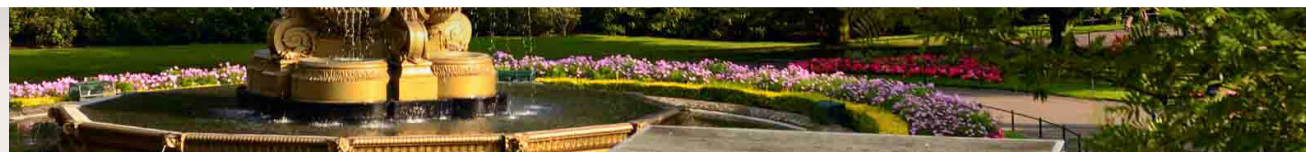
Danielle Hollander, CMO at Visit Orlando, shares why always-on marketing is a must to stay connected with travelers throughout their planning journey: "Our SEM and paid social are always on because there's no linear travel cycle. People are dreaming, booking, or planning at different times, so we need to catch them when they're ready. Whether someone is in Wichita or New York, their timing and behavior might differ completely. For example, in the U.S., our booking windows are typically 3-8 weeks out, even for conventions. Travel decisions are often last minute, so we have to stay present year-round."



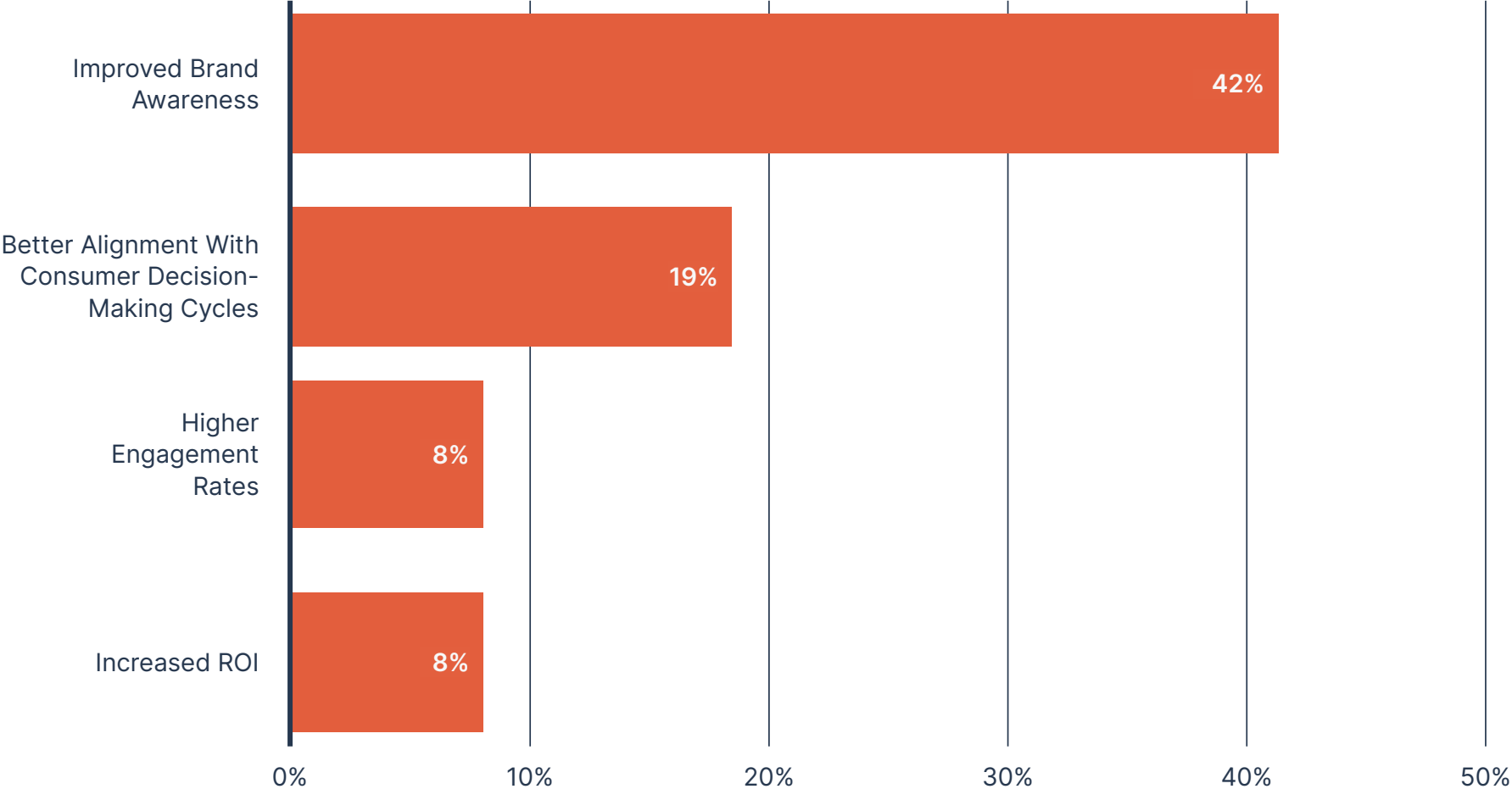
MARKETING 101

What is Always-On Marketing?

Always-on marketing is a dynamic, ongoing approach that provides continuous visibility to travelers throughout the year. Unlike traditional episodic campaigns or short-term "burst flights" focused on seasonal goals, always-on strategies use real-time traveler intent data, audience segmentation, and personalized messaging to engage consumers throughout the travel planning journey. This method ensures destinations can capture demand during peak seasons while nurturing interest during slower periods, making it a customer-centric way to remain relevant and top of mind for potential visitors.



What Is the Most Significant Impact of An Always-On Marketing Strategy on Overall Campaign Performance?



**Excludes respondents who answered "Not sure / decline to answer"*

Maximizing Impact With Co-Op Marketing

Co-op marketing continues to grow as a resource-sharing strategy, with participation increasing from 78% to 83% of study participants year over year. Growth was especially strong in Europe, where participation among respondents increased 16% year-over-year.

Collaboration is key to driving tourism success, especially in a vibrant destination like Memphis. As Ashley McHugh, Senior Director of Research at Memphis Tourism, explains: "We focus on building coalitions of attractions, amenities, and organizations within Memphis, bringing them together around a common audience. Travelers don't come for just one attraction or experience, so we help these groups collaborate to maximize their budgets. By identifying shared audiences, we can align efforts to attract visitors who are likely to enjoy multiple facets of our destination. It's about working together to create a more compelling draw for common audiences."

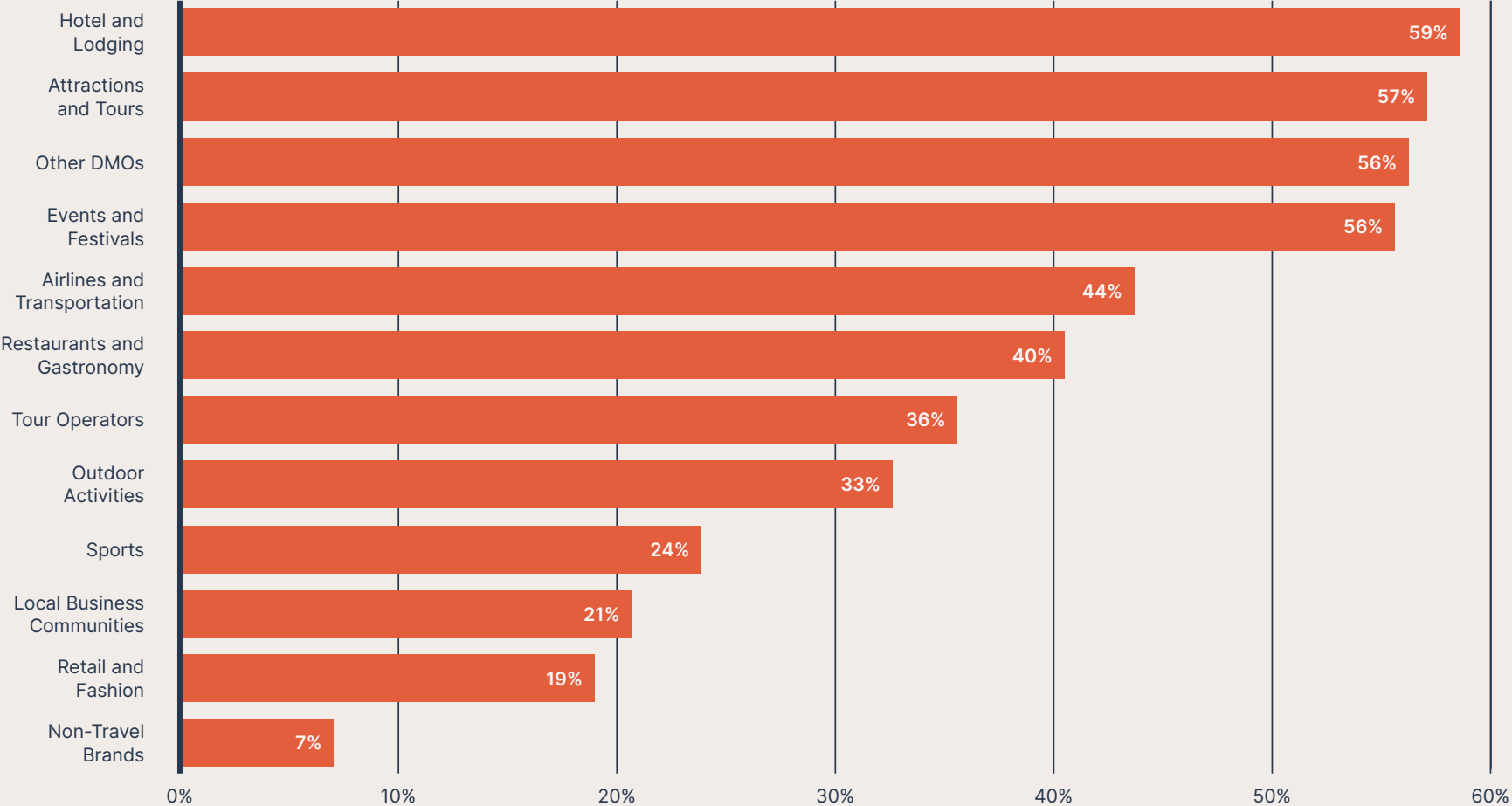


MARKETING 101

What is Co-Op Marketing?

A co-op campaign is when multiple industry partners work together to invest a larger campaign budget, leveraging the combined resources of each partner to reach a broader audience. Working with airlines, hotels, attractions, and other businesses allows DMOs to extend their reach and increase total marketing spend. This approach—which allows destinations to scale campaigns, achieve economies of scale, and support smaller participants by integrating them into larger marketing efforts—is a proven way to grow visibility while building stronger stakeholder relationships.

Which of the Following Do You Consider as Partners Who Might Join Your Digital Co-Op Marketing Campaigns?



Embracing Full-Funnel Marketing

Though our survey shows a decline in the percentage of participants describing full-funnel marketing as the primary way they run their marketing efforts, half of DMOs reported using this approach. It's a strategy that aligns brand-building efforts with bottom-of-the-funnel tactics like driving bookings and conversions. However, improving attribution and tracking remains a key opportunity for optimizing these campaigns and proving their ROI.

Danielle Hollander, CMO at Visit Orlando, explains why full-funnel marketing is critical, especially on social media, where each platform and piece of content serves a unique purpose. Her team's focus? Meaningful engagement over vanity metrics: "Full-funnel marketing is essential, especially in social media, where different content serves distinct purposes. Some posts inspire, others drive traffic

to our website, and some are focused on conversions. The challenge is that digital marketing evolves rapidly—not just month to month, but also across markets. For example, while CTV and streaming dominate in the U.S. and Brazil, Canada and the UK are just beginning to explore them.

Each platform also plays a unique role—Pinterest excels in one area, TikTok in another, and Facebook remains dominant in others. Our focus is on metrics that matter: engagement. It's not about follower counts or raw web sessions, which you can buy, but about how deeply people interact with our brand and content. Engagement-oriented metrics now guide everything we do."

SOJERN'S EXPERT PERSPECTIVE

Last year's data revealed that 70% of DMOs invested in full-funnel campaigns, signaling a shift from their traditional emphasis on upper-funnel efforts. This year, study participants reported an even split between stage-specific (50%) and full-funnel (50%) approaches. This shift is likely due to the fact that destinations are rebalancing strategies after adjusting plans to a post-COVID world. Since then, DMOs had a bigger need to drive bookings for more short-term results to help businesses bounce back. Now that the industry has stabilized, DMOs are rebalancing to bring brand awareness back into the market and put more focus on long-term strategic plans.

Using **Programmatic Advertising** for Precision

Programmatic advertising has become a go-to strategy for DMOs, and it's easy to see why. In our study, 83% of respondents said they rely on it—and for good reason. Programmatic combines the best of both worlds: the ability to scale your campaigns while delivering precise, targeted messaging to the right audience at the right time.

Programmatic is one of the most popular channels, with **83% of DMOs** investing in it.

With programmatic, you can automate the ad buying process, saving time and making your campaigns more efficient. It also helps you optimize in real time, so you're always making the most of your budget. Whether it's targeting travelers based on their intent or fine-tuning performance as your campaign runs, programmatic makes it easier to get better results.

A man with a beard and grey hair, wearing a dark suit, is sitting on a wooden bench outdoors. He is looking down at a smartphone in his hands. The background is a blurred city street with a traffic light showing a green light. The entire scene is framed within a large circle with a dotted orange border.

83%

of DMOs invest
in programmatic

Driving Results Through **Personalization**

Advertising personalization represents a significant yet underutilized opportunity for DMOs to create stronger, more meaningful connections with their audiences. Despite the capabilities of tools today to deliver tailored messages like never before, only 15% of DMOs report using advanced personalization techniques, and fewer than 2% employ hyper-personalization.

Using personalization technology, destinations can deliver highly relevant, customized experiences that resonate with individual travelers, increasing campaign effectiveness and engagement. It's a chance to stand out and build lasting connections with audiences at every stage of their journey.

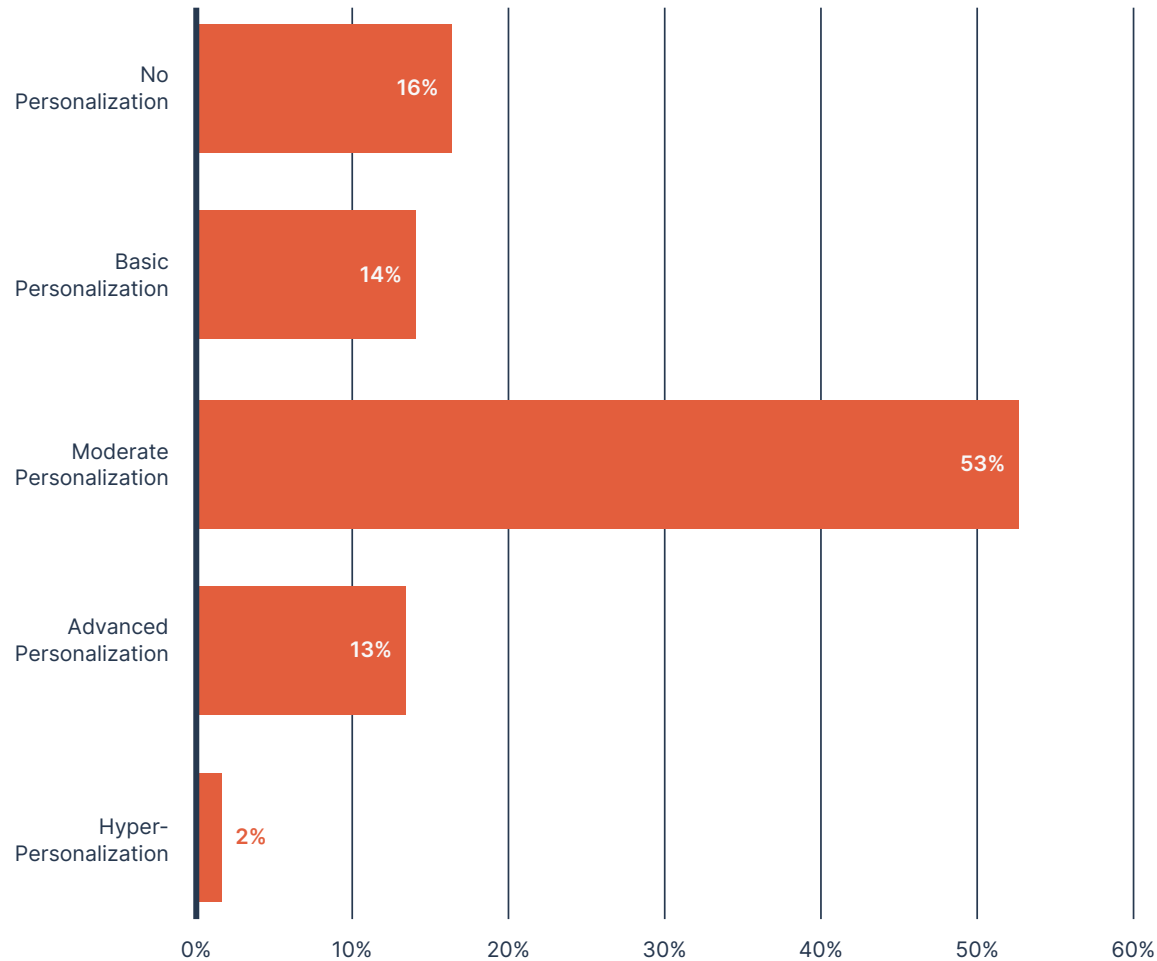
Ashley McHugh, Senior Director of Research at Memphis Tourism, shares how her team adapts their messaging to match where travelers are in their journey: "Memphis Tourism is constantly thinking about how to communicate with the same traveler at different stages of the funnel.

For example, if someone sees a billboard, that can inspire awareness. On social media, the same traveler is more likely to be in the consideration phase, whereas they might be closer to conversion when looking at hotel listings. That means our

marketing messages about Memphis need to change, too, throughout the trip planning process, to stay compelling. Tracking what works across the full funnel is complex, but it helps us deliver strong results."



To What Extent Does Your Organization Focus on Personalization in Advertising?



**Excludes respondents who answered "Not sure / decline to answer"*

How We Defined Personalization for This Study

- ▶ **No personalization:**
one-size-fits-all messaging
- ▶ **Basic personalization:**
using names or locations
- ▶ **Moderate personalization:**
targeting based on past behavior or preferences
- ▶ **Advanced personalization:**
real-time adjustments across channels
- ▶ **Hyper-personalization:**
AI-driven predictions and real-time updates across channels

How Visit Orlando Uses Segmentation

Danielle Hollander, CMO at Visit Orlando, shared how strategic storytelling has shaped her approach, showing how personalized messaging can change perceptions and build deeper connections with diverse audiences.

"We're incredibly fortunate in Orlando to attract visitors from every country and territory in the world, but that also means we have to be very strategic about how we allocate resources and define our segments. For example, while we're known as a family destination, only 32% of travel parties have children. In Colombia, we market exclusively to families, while in the U.S., it's a 50/50 split between families and adults. We also break these groups into new and repeat visitors, tailoring strategies to what each market values most.

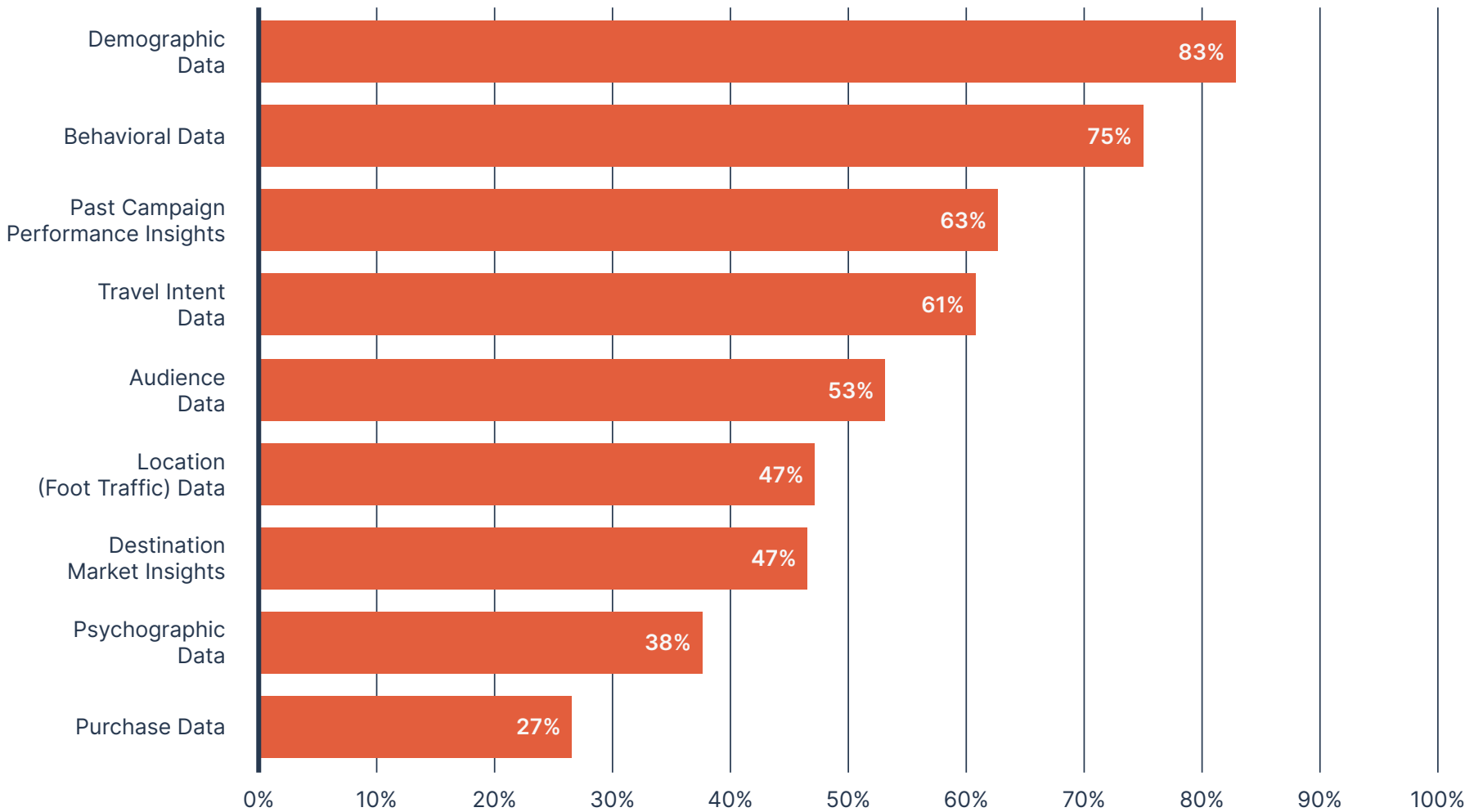
Our segmentation goes deep. In the UK, visitors typically come for theme parks, not culinary trips, while Mexican travelers are interested in dining but

won't travel specifically for it. We've identified six to eight key segments, such as culinary-focused or outdoor-focused travelers, and use a data-driven approach to determine which will deliver the best return.



In addition to these segments, we run year-long campaigns for African-American, Hispanic, AAPI, and LGBTQ+ audiences, ensuring culturally relevant connections. For example, we've created an African-American travel guide with Urban One and participated in Pride events in Chicago and Dallas. Our goal is to let all travelers know Orlando is welcoming and offers something meaningful for everyone, whether it's exploring the oldest African-American municipality in the U.S., enjoying culinary experiences, or embarking on outdoor adventures."

What Types of Data Do You Use for Targeting in Your Campaigns?



*Excludes respondents who answered "Other" or "Not sure / decline to answer"

Unlocking Performance with **Behavioral Data**

Shifting focus from demographic to behavioral data allows DMOs to understand traveler preferences and actions more deeply. This is an opportunity for destinations to differentiate themselves through more relevant campaigns and content based on what users do online vs demographic assumptions.

Behavior data allows DMOs to personalize campaigns, target the right audience, optimize user experiences, and drive higher engagement and conversion rates.

DMO PERSPECTIVE

Danielle Hollander | CMO at Visit Orlando

“Digital marketing has always had this promise of delivering the right message to the right person at the right time. What’s really making that promise a reality is the prominence and importance of data—everyone’s come to realize it’s our core strength. On top of that are the providers. We’ve been searching for those who can help us reach people who’ve never been to Orlando, and not all of them can do that. Now, we have access to channels with advanced layers of segmentation, and the sophistication of digital channels has grown so much. There are so many more options, and they can do so much more.

Then there are the measurement tools. Being able to see what’s working and what’s not in real-time—and optimizing against it—has been a game-changer. It’s incredibly exciting but also incredibly stressful. There’s no more ‘set it and forget it.’ And while AI has been part of MarTech for a long time, it’s still driving a lot of these advancements.”

SUCCESS STORY

Brand USA + R&R Partners

Social Media Advertising Drives Impact With Precision for Brand USA

Today, travelers spend more time in the consideration and research phases, and social media enables destination marketers to engage qualified audiences throughout the path to purchase. Platforms like Meta allow for targeted messaging at every stage—whether travelers are dreaming, planning, or ready to book—while advanced measurement tools ensure campaigns are optimized for impact, efficiency, and accountability.

A recent partnership initiative between Brand USA and their agency, R&R Partners, and Sojern highlights the power of this approach. Looking to reach in-market international travelers and inspiring them to visit the U.S., their goal was to engage qualified audiences across 11 key countries—targeting those interested in international travel

but not yet considering the U.S. as a destination—and drive incremental reach through competitive conquering tactics. To elevate their Meta campaigns and drive incremental reach, they leveraged Sojern's proprietary real-time travel intent data. By analyzing billions of travel intent signals, the teams identified and targeted travelers actively in-market, delivering messages that inspired visits and drove key on-site engagement actions, such as time spent and wishlist adds.

The results underscore the effectiveness of data-driven social media campaigns: Brand USA and R&R Partners achieved an impressive 85% year-over-year improvement in cost per acquisition (CPA), with half of the countries improving as much as 90% or more. By reaching highly qualified

audiences with precision targeting, the teams demonstrated how social media can deliver measurable ROI, maximize campaign efficiency, and unlock significant value for destination marketing efforts.



Enhancing Precision with **Location Data**

Nearly half of our study participants report using location data to refine targeting and measure campaign performance. By analyzing location data, DMOs can uncover key patterns and trends that inform decision-making.

47% of DMOs use location data for targeting in campaigns.

For example, this data can reveal which attractions are most popular among visitors, guiding campaign design. Insights into arrival trends—such as which days of the week travelers tend to arrive—can help marketers time their campaigns for maximum impact.

Location data also reveals where visitors are traveling from. This allows DMOs to focus their resources on the most promising feeder markets while tailoring messaging to resonate with these audiences.

By doing this, destination marketers can allocate budgets more effectively, improve targeting, and create campaigns that resonate with travelers at every stage of their journey.

ISSUE IN FOCUS

The Evolving Role of DMOs in Addressing Overtourism

The conversation around overtourism is shifting to an emphasis on responsibility and sustainability. DMOs today play a critical role in communicating a destination's vision and shaping visitor behavior. Campaigns promoting longer stays and sustainable practices align economic benefits with community well-being.

Effective destination marketing centers on attracting the *right* visitors—those who stay longer and visit lesser-known areas—rather than simply focusing on visitor numbers. This approach contributes to economic progress while preventing overcrowding.

Adopting AI for Data Analysis

While AI is commonly used for content creation, only 28% of DMOs in our study reported using AI for data analysis. Expanding AI use for this purpose represents a powerful opportunity to uncover trends and elevate campaign performance. Destination marketers that integrate AI into their campaign processes can make smarter, faster decisions.

Nearly **two-thirds** of DMOs use AI for content creation.

Meaghan Ferrigno, Chief Financial Officer & Chief Data and Analytics Officer at Destination Canada, shares how this technology is driving data literacy: "As Chief Data and Analytics Officer, I work closely with our CMO to provide the privileged insights that drive strategic differentiation. From a data perspective, I see generative AI as the tool that will break

down barriers to data literacy between teams—fast. Instead of marketers going to a dashboard and stopping at surface-level insights, generative AI allows them to have a conversation with the data.

Marketers are naturally curious—they ask great questions. With traditional dashboards, they'll say, 'That's interesting,' and then follow up with 20 more questions that weren't accounted for in the requirements. Generative AI solves this. It keeps digging deeper, answering questions, and returning insights in a format that marketers can interact with and use.

At Destination Canada, we're sitting on 20 billion data points of supply and demand-side data. Generative AI will be the fastest way to surface actionable insights, making the data more practical, consumable, and ultimately usable for marketers."

How is Your Team Currently Integrating AI Into Your Digital Marketing Efforts?

63% content creation (e.g. copywriting, video editing)

28% data analysis and insights

27% chatbots and customer interaction

21% personalization and targeting

13% do not use AI at this time

**Excludes respondents who answered "Not sure / decline to answer"*

Telling Stories That Resonate

Storytelling remains one of the most powerful tools DMOs can use to emotionally connect with their audiences. It goes beyond simply promoting attractions—authentic and engaging stories help travelers see themselves in the destination, creating a sense of curiosity, aspiration, and trust.

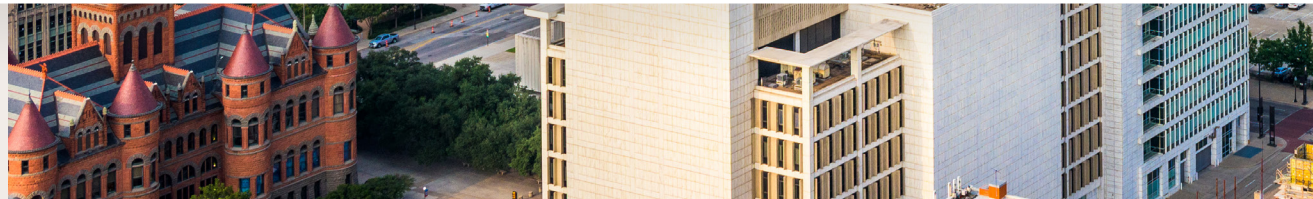
By sharing narratives that highlight unique cultural experiences, local traditions, and personal stories, destinations can drive both awareness and action, inspiring travelers to not only visit but also form lasting connections. When done right, storytelling becomes the bridge between a traveler's dream and their decision to explore.



DMO PERSPECTIVE

Jennifer Walker | CMO at Visit Dallas

“We lean into what makes Dallas unique: we’re prideful, a little bougie, and embody a maverick can-do spirit. Dallasites balance our boldness (and swagger) with a warm, welcoming, and genuine hospitable spirit. That’s what makes this city so special.”

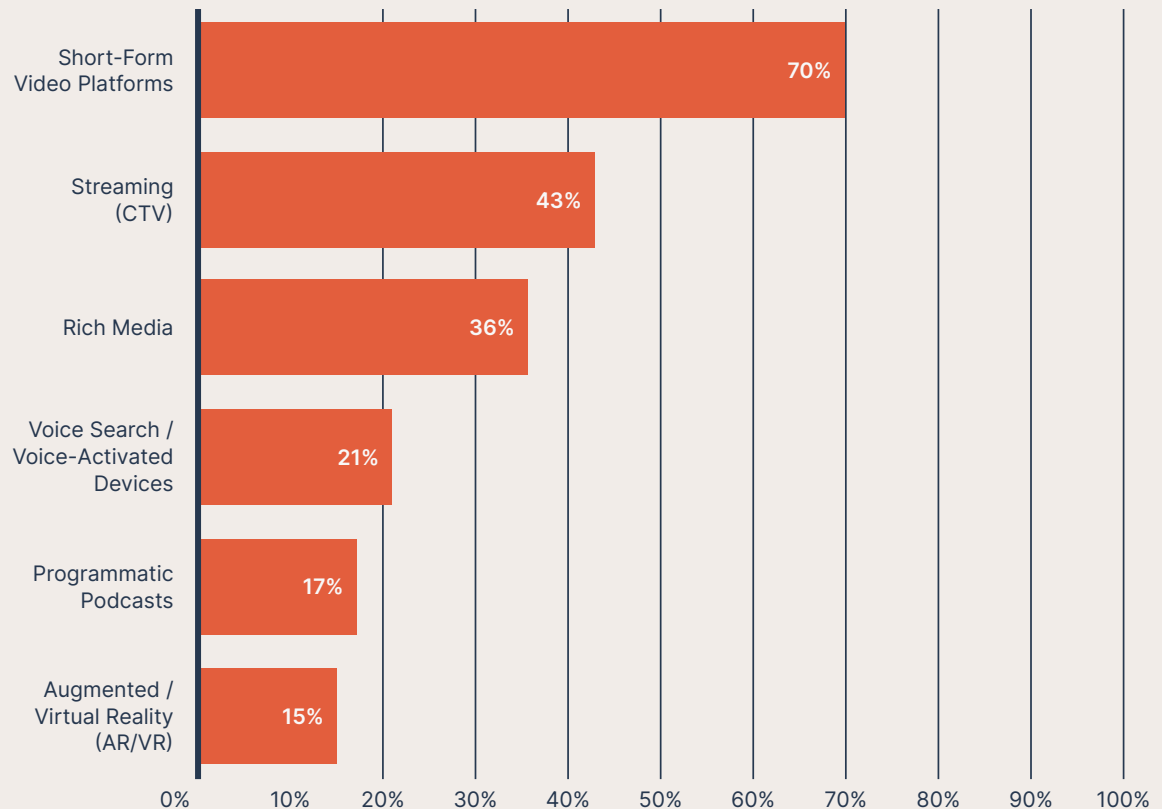


Creatively **Engaging Audiences**

As digital advertising becomes increasingly prominent, engagement has emerged as a top strategic goal for DMOs in our study. Short-form video, interactive content, and live streams offer exciting new ways to connect with audiences. Additionally, collaborating with “micro-influencers” allows destinations to deliver authentic, targeted messaging that resonates deeply with niche traveler groups.

70% of DMOs believe that **short-form video** will become critical to their strategy in the next 1-3 years.

Which Emerging Channels or Trending Formats Do You Anticipate Will Be Critical for Reaching Your Target Audience in the Next 1-3 Years?



**Excludes respondents who answered "Other" or "Not sure / decline to answer"*

ISSUE IN FOCUS

Creative AI Drives Both Brand Building and Strategic Engagement Goals

AI is starting to show creative opportunities for destination marketing, as demonstrated by a recent campaign from the Netherlands Board of Tourism & Conventions. Marketing Director Charel van Dam shared how the organization developed an AI tool that allows users to reimagine their streets as cycling-friendly, Dutch-style thoroughfares. “We don’t just say we’re cycling friendly—we show that we’re actually trying to help make destinations worldwide cycle-friendly,” van Dam explains.

This initiative aligns with the Netherlands’ brand DNA, emphasizing it as a leader in sustainability. “This is quintessentially Dutch and is our way of contributing to a better world,” says van Dam.

The tool encourages users globally to imagine the potential of cycling-friendly streets, promoting sustainable urban mobility and reflecting the Netherlands’ values.



For van Dam, the project exemplifies what he calls “symbolic actions in marketing”—delivering on a brand promise through meaningful contributions rather than empty claims. “A lot of fast-moving consumer goods brands do this—they look at who they are and try to do it rather than say it. For us, this was a way to make our cycling-friendly ethos tangible while experimenting with new technology,” he adds.

By using AI in a creative way, the Netherlands brought its sustainability vision to life while strengthening its brand identity in a meaningful and impactful way.

Looking Beyond Traditional Tourism to Drive Results

As many DMOs evolve into destination stewards, they are embracing broader strategies to connect tourism with areas of strategic importance, such as talent, trade, and investment. For example, by focusing on health, sustainability, and governance, the Netherlands Board of Tourism & Conventions is building a brand that resonates across industries and creates long-term value.

Charel van Dam, Marketing Director at the Netherlands Board of Tourism & Conventions, explains how they've expanded beyond tourism to attract talent, investments, and build a future-focused brand: "One of the biggest shifts for us as an NTO has been moving beyond the traditional 'visit' focus to align with organizations focused on talent, investment, and trade. Research shows that people are much more positive about a destination after visiting, so our role isn't just to attract visitors—it's about attracting the right talent, students, and investments. To do this, we've started

testing the limits of what we do as an organization. We're moving away from traditional press trips that simply highlight attractions and instead inviting thought leaders in sectors like health, sustainability, and governance. By connecting tourism

to broader topics, we position the Netherlands as a leader in these areas while also promoting the destination. For us, it's less about promotion and more about branding—creating a future-proof image of the Netherlands that reflects key values and priorities across sectors."

There are more opportunities than ever to create an impact through marketing today. From AI to video-based storytelling, powerful tools create new possibilities for engaging the people that matter, delivering measurable results, and shaping a bright future for cities, regions, and countries.



ISSUE IN FOCUS

AI Increases the Importance of Destination Marketing Strategy

As AI tools such as ChatGPT become more commonly used for travel planning, the role of destination marketing has never been more vital. Charel van Dam believes 2025 marks a turning point where AI's influence on travel decisions must be actively managed. "It's time to accept that AI is here to stay and that we need to act on it, especially as destinations," van Dam shared.

AI chatbots often prioritize popular attractions while overlooking hidden gems—especially when used by novice users. For destinations like the Netherlands, where overtourism in hotspots like Amsterdam is a pressing issue, this can lead to overcrowding

and poor experiences for visitors and residents alike. "AI doesn't take this into account by itself," van Dam explains.

This dynamic underscores the growing importance of DMOs as stewards of trusted, curated information. "If I had to choose between investing in a fabulous website or a database with content that is vetted, curated, and secured, the second would always be my prime focus," van Dam says. By ensuring accurate and comprehensive data, these organizations can use AI as a tool to highlight the full breadth of what a destination offers, steering travelers toward lesser-known experiences that benefit both visitors and local communities.

With AI becoming increasingly prevalent, destination marketing has a new opportunity: ensuring travelers know more than just the headline attractions to promote sustainable tourism and balanced visitor distribution. "AI makes it even more essential for us to act, ensuring people have the ability to visit us and have a positive experience," van Dam shares. "We won't succeed if we don't engage." By embracing their role as trusted guides in the AI era, DMOs can shape a more equitable and enriching future for travel.

CHAPTER 5

The Road Ahead

The future of destination marketing is being written right now. As DMOs face increasing challenges—tight budgets, changing traveler behaviors, and growing stakeholder demands—they're also unlocking new opportunities to redefine how destinations connect with the world.

In this final chapter, we'll explore what's next for destination marketing. The future isn't just about keeping up—it's about reimagining what's possible and creating a lasting impact for travelers and communities alike.



The Next Era of Destination Marketing **Starts Here**

As our research and this report highlight, destination marketers work at the intersection of more challenges and opportunities than ever before. From budgets never as large as their expectations to the complexities of running multichannel campaigns and the need for clear ROI, today's challenges demand creativity and innovation. At the same time, opportunities abound in digital marketing, from leveraging AI for data analysis to embracing emerging engagement strategies, co-op marketing, and the growing popularity of video. These trends give us a glimpse into the transformative potential within the industry and the need for DMOs to adapt.

Destination marketing will be shaped by those who embrace change and lead with purpose. By aligning KPIs with organizational goals, investing in technology and personalization, and crafting compelling narratives that

resonate with an array of audiences and stakeholders alike, DMOs can work through today's obstacles to usher in an exciting and sustainable future.

The time to act is now. As the industry evolves, those who seize the opportunities and innovate boldly will not only drive visitors but also leave a lasting impact on their communities and the destinations they represent.



APPENDIX

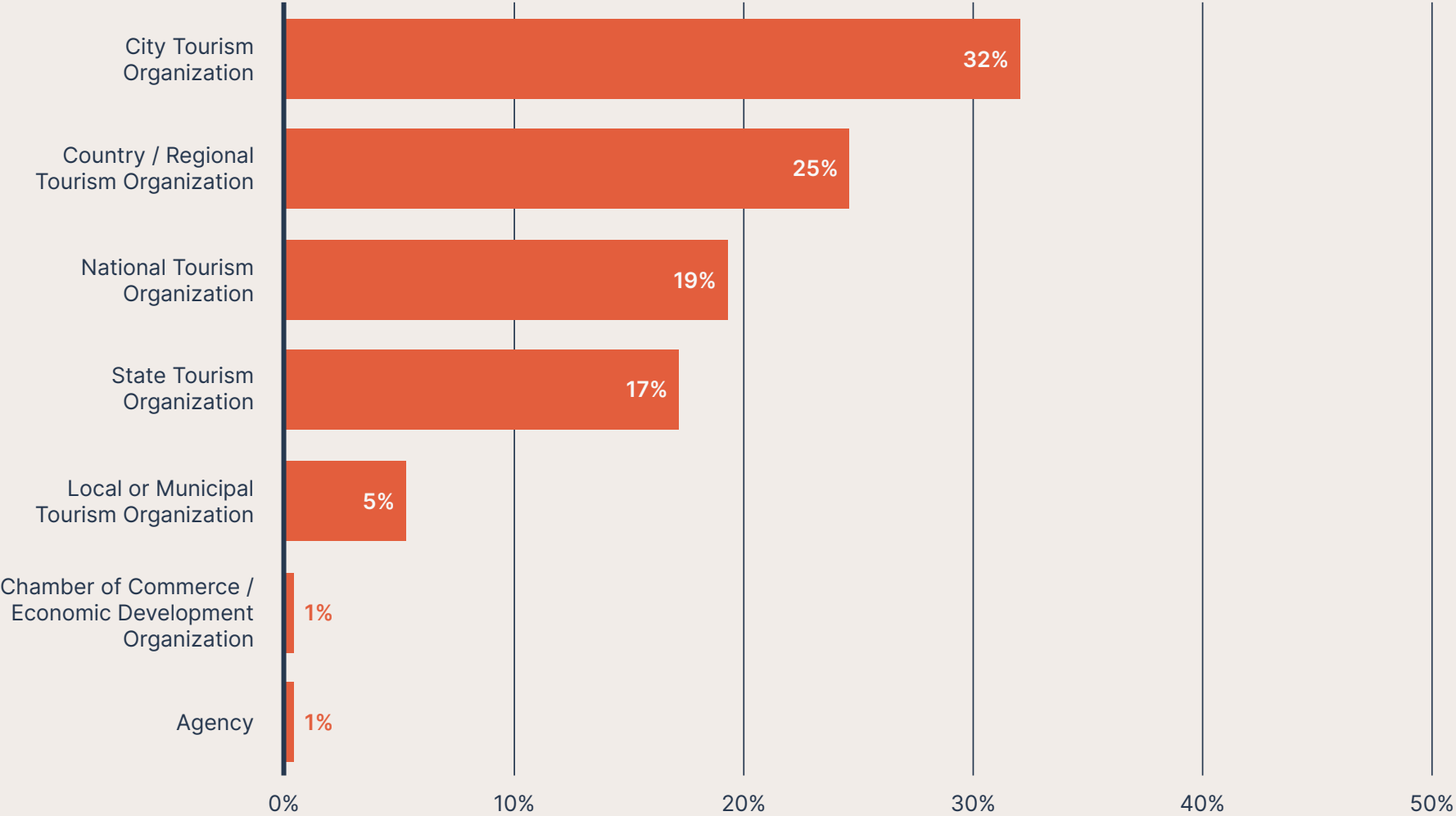
About the Study

The data in this report is based on independent research conducted by Benchmark Research Partners in the Fall of 2024, with support and guidance from Sojern, Brand USA, Destination Canada, the European Travel Commission, and the Caribbean Tourism Organization also provided support in the fielding of this study. Nearly 200 participants from leading DMOs worldwide contributed their insights.

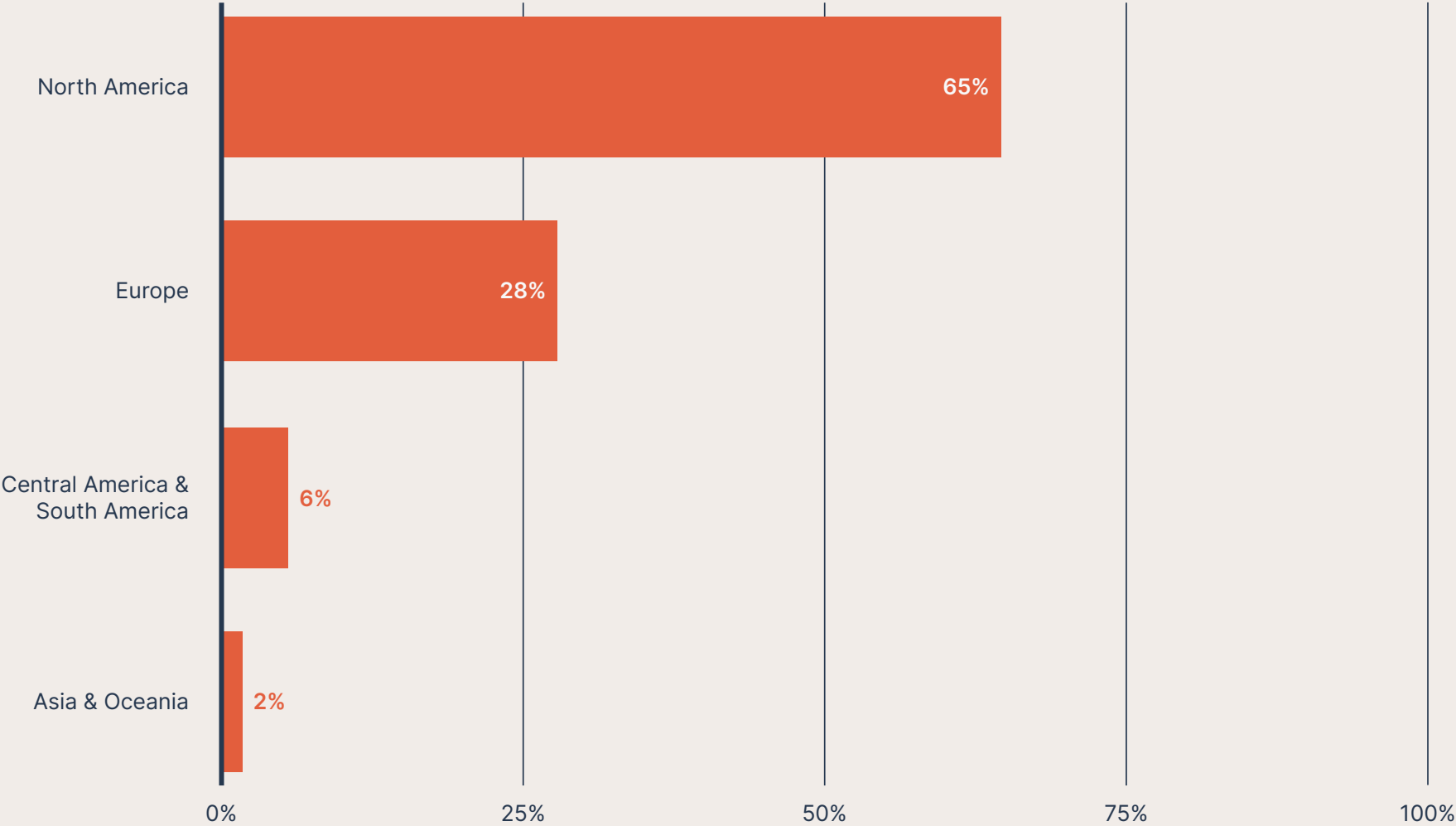
This research explores key trends and priorities in destination marketing, with real-world insights from industry leaders. To ensure transparency, we've also noted where responses were excluded due to participants selecting "not sure" or choosing not to answer. This helps provide a more accurate reflection of both industry consensus and areas where uncertainty remains.



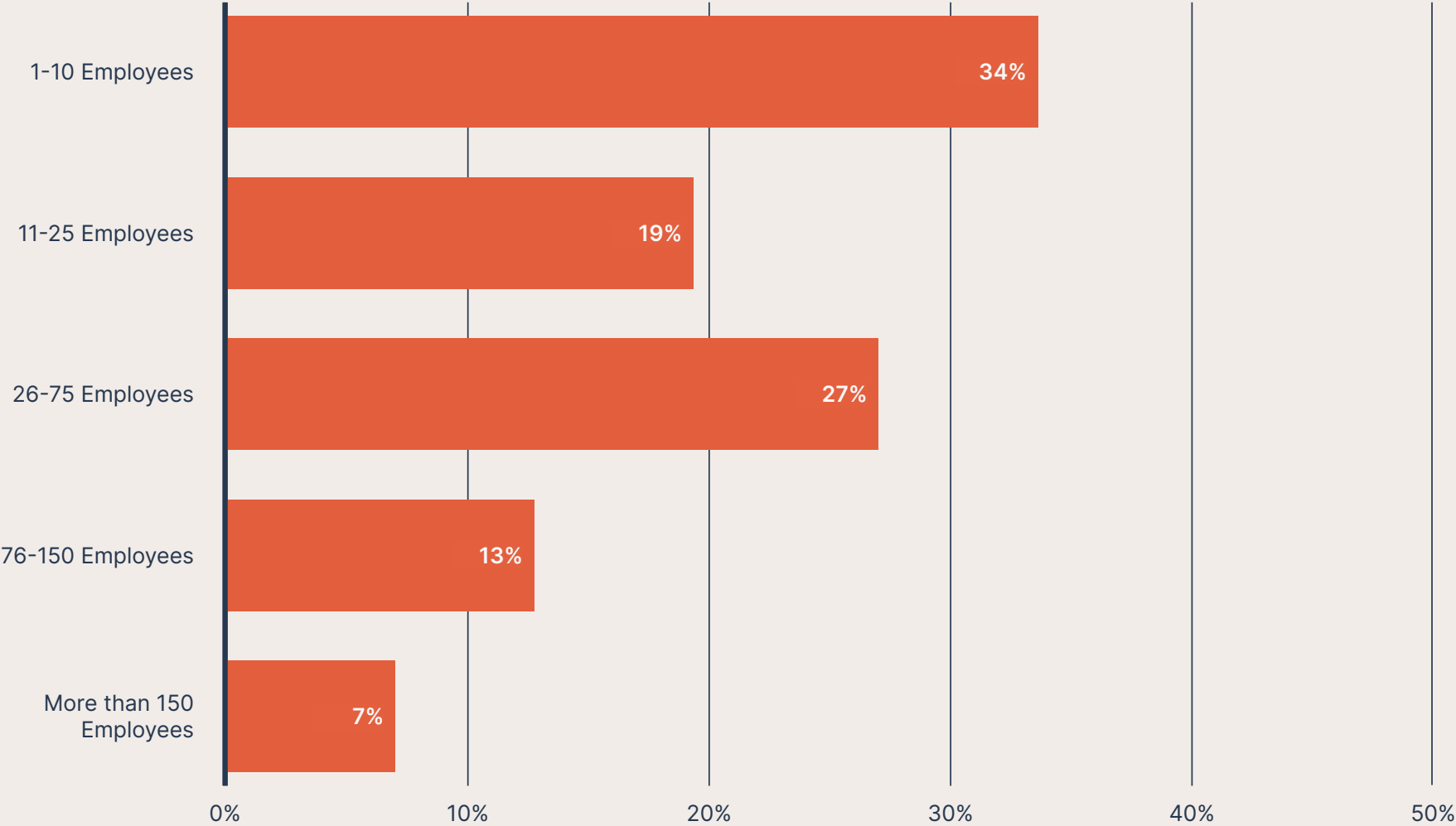
What Type of Organization Are You Representing?



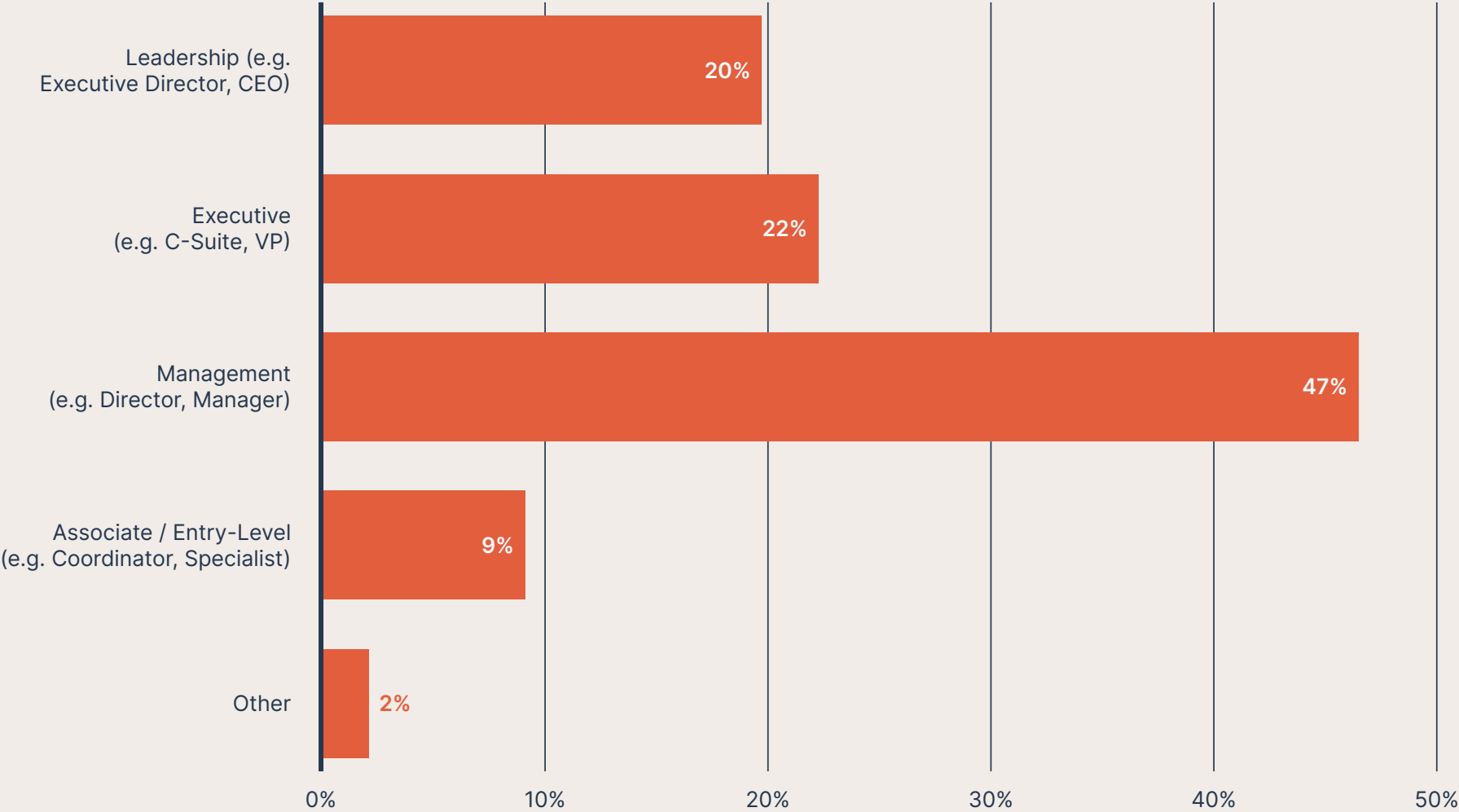
In Which Region is Your Organization Based?



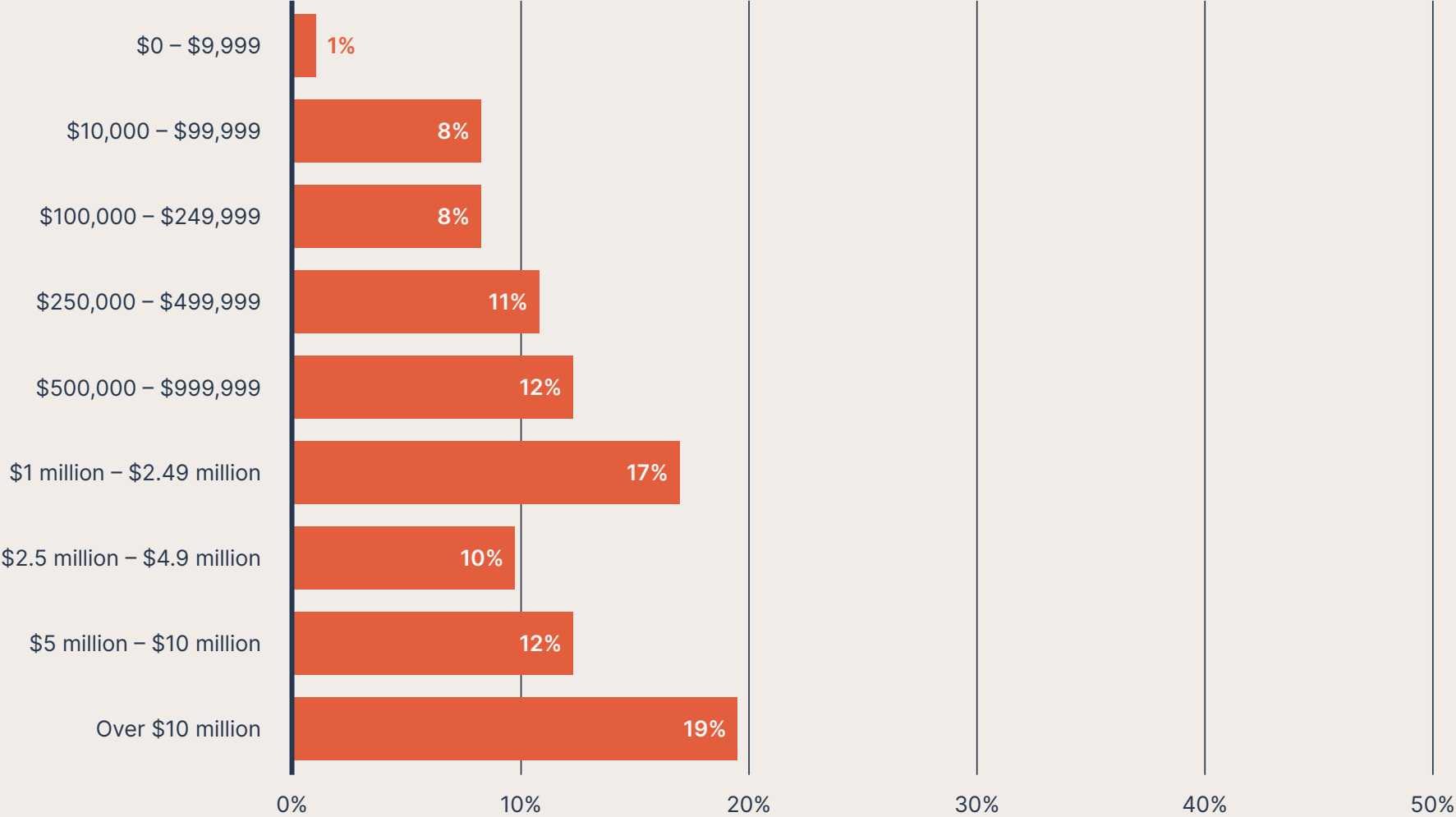
What Is the Size of Your Organization?



What is Your Position Within the Organization?



What Is Your Approximate Annual Marketing Budget, Excluding Staff (in \$ USD)?



*Excludes respondents who answered "Unknown"



The Sojern Travel Marketing Platform helps destination marketers reach and inspire travelers throughout their planning journey across digital channels. With unmatched visibility into travel demand and market insights, we build audiences to find the right travelers for your destination. The platform is flexible to meet the needs of destinations and their stakeholders and gives visibility into the economic impact of your marketing efforts. Ten thousand destinations, hotels, attractions, and travel marketers rely on Sojern annually to engage and convert travelers around the world.

Learn more at www.sojern.com.