

# 2022 Digital Marketing State of Technology Survey

## Travel & Hospitality



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# State of Technology

## Travel & Hospitality

The travel & hospitality sector is at a tipping point. The pandemic exposed deep foundational weaknesses, but also revealed that improving digital transformation maturity – how well people, processes and technologies work together – is the clear path forward.

While our survey found that confidence in increased tech budgets and adoption is buoyed by strong optimism for overall growth in the next 12 months, that optimism was lowest among the travel & hospitality sector. A clear gap exists between where the industry needs to go, and the processes and technologies employees currently are using to get there.

In the past, most brands achieved “good enough” results by pushing teams to their manual limits, but that is no longer possible. Staffing shortages are not going to improve overnight and the ways in which teams work together have fundamentally changed for the foreseeable future.

Driving real and measurable digital transformation will require human transformation and re-evaluating how to integrate and automate the technologies proven to improve employee happiness, customer service and cost efficiencies, while also delivering on the game changing promise of personalization at scale.

**A strong correlation exists between improving customer journeys/personalization and the need for operations-focused digital transformation to achieve that outcome.**

### Biggest non-sales / Marketing growth opportunities





## TRAVEL & HOSPITALITY

# Internal Digital Transformation Change Agents

The next five years will be wild and exciting for the travel & hospitality industry, and a lot of money will be left on the table for brands that don't get digital transformation and personalization right.

Today, 67% of travel firms say they do not have the technology to support their personalization strategy. Too many broken processes and insufficient capabilities are preventing travel & hospitality brands from being in a place of readiness.

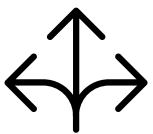
The most successful brands feature change agents empowered to have the right conversations across the ecosystem to bridge digital transformation gaps, rather than

investing in divisional technologies. Common tools become the thread to link disparate teams and ensure everyone is working on the same system and seeing a unified view of the customer to deliver personalized, up-to-the-millisecond services, and revenue-generating opportunities.

By focusing on digital transformation that improves business continuity and employee and customer journeys, brands can weather storms better and re-establish themselves outside of their traditional boxes to become go-to providers of truly memorable travel & hospitality experiences.

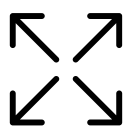
Nearly half of organizations **do not** have a clear integrated technology strategy across the business with many organizations still allowing different parts of the business to make potentially misaligned investments. Combined with growing technology budgets, the potential for more disconnected systems is high if left unchecked.

### Formal Strategy for Tech Investment



**51%**

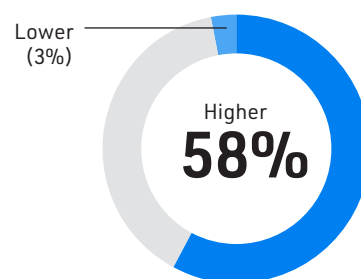
clear integrated strategy across different parts of the business



**44%**

different parts of the business invest according to their own strategies

### 2022 Tech Budget vs. Pre-COVID



Confidence in increased tech budgets & adoption is buoyed by strong optimism for overall growth in the next 12 months (97%)



## Travel: Strategy at A Glance



### Technology

**67%**

of travel firms believe they **don't have the technology** to support their personalization strategy



### Strategy

**76%**

of travel firms believe they **don't have a clear personalization strategy**



### Organization

**68%**

of travel firms **don't have a single executive responsible** for personalization



### Process

**71%**

of firms believe they **don't have a feedback loop** for their personalization strategy



"At Marriott International, one of our core value statements is that success is never final. By connecting and optimizing our people, technologies, and processes, we can be more nimble, offering transparency to our internal stakeholders while delivering increasingly personalized marketing to our customers."

Michelle Cascone  
*Marriott International Change Agent and Director of Digital Personalization and Marketing Orchestration*



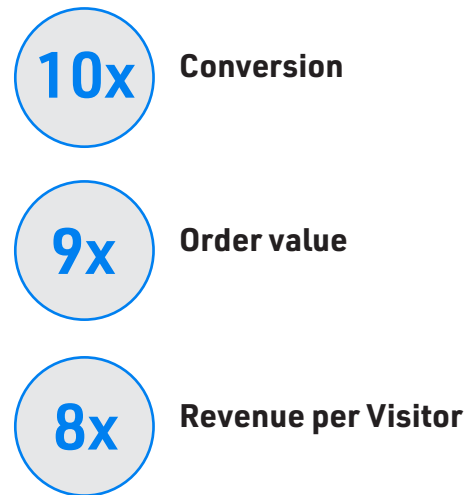
## TRAVEL & HOSPITALITY

# External Technology Integration Partners

Digital transformation implementation and integration are primary barriers and represent significant hurdles—either from a manpower, time, or functionality perspective. Front-of-the-house and back-of-the-house collaboration are a must-have in the form of workflow automation for employees and customer journey automation for personalized experiences.

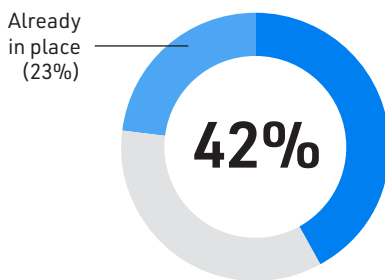
Architecting seamless technology orchestration that links initial strategy with campaign lifecycles, data & setup, creative design, content and production to identify and market personalized digital campaigns in a faster, scalable way is complicated work, but the value is clear.

### Personalization Maturity drives growth for Travel & Hospitality



### Interest in Working with Tech Partners

% Very Interested



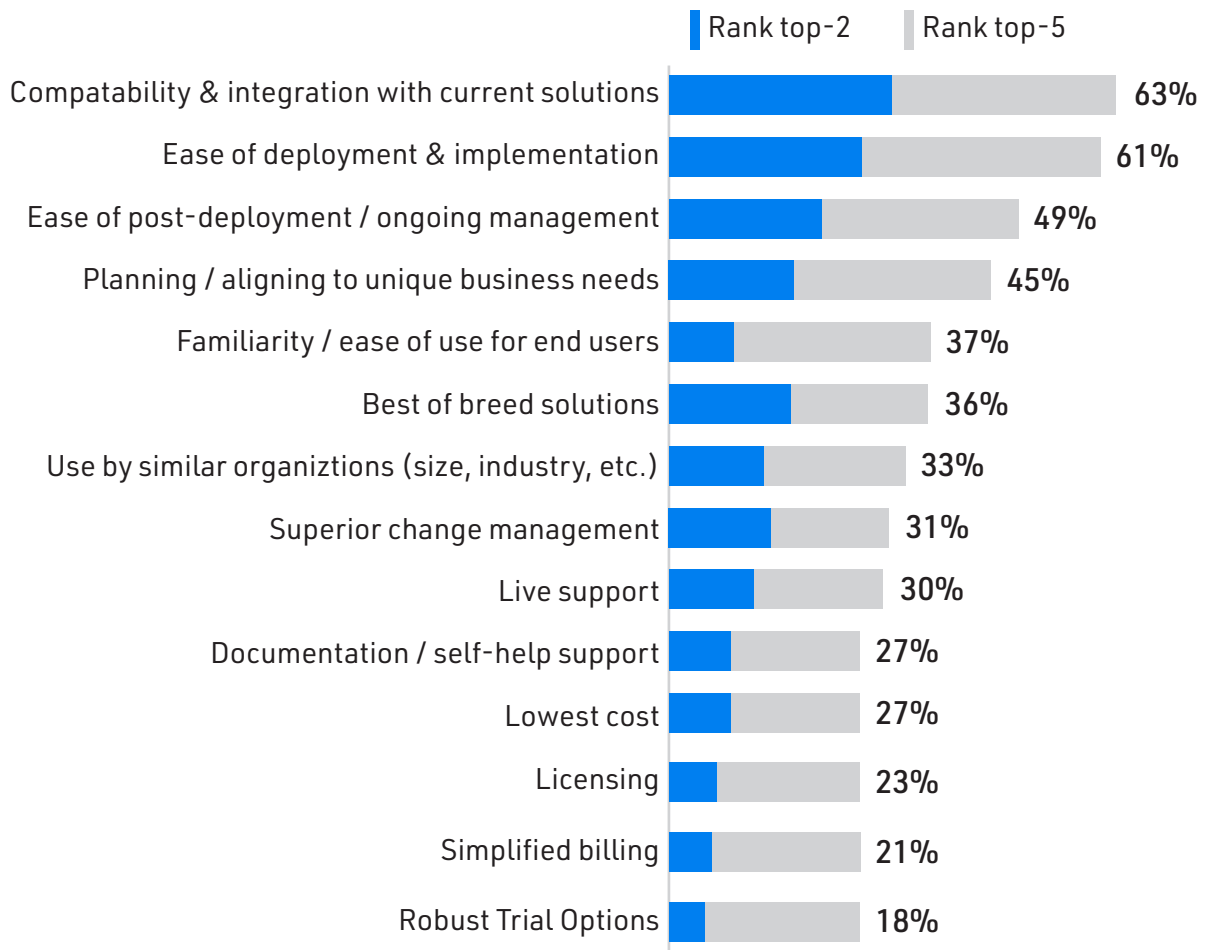
Universally, brands are increasingly working with integration and implementation partners to deliver the right technologies to serve as the connective tissue between corporate strategy, goals and execution.

Technology partners help brands quickly identify what is taking the longest and pinpoint the underlying people and process technology gaps responsible for the most common complaints and delays among employees and customers. By helping brands better integrate existing systems with compatible, easy-to-deploy new systems, technology integrators add value by helping companies better leverage technology investments and achieve the greatest utilization and lift enterprise-wide.



Travel & hospitality companies need partners who can help them with compatibility challenges and integration with current solutions. The closer to plug-and-play solutions can get when it comes to integration and implementation, the better.

### Most Important Tech Provider Evaluation Metrics



***"Our company has many disparate systems, and we need them to talk to each other."***

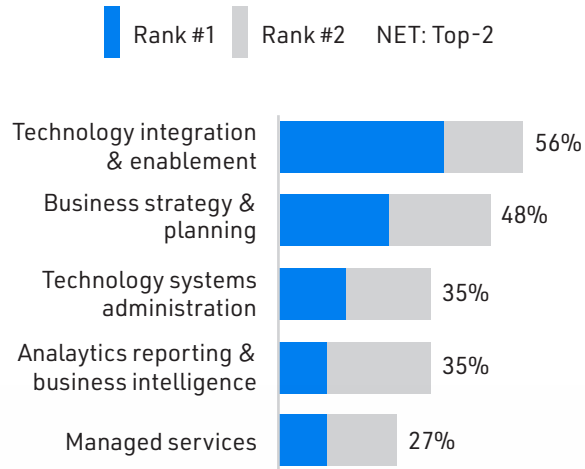
***2022 Digital Marketing State of Technology Survey Respondent***





Respondents said the top two areas where technology partners can add the most value and positive impact are technology integration and business strategy and planning.

### Most Positive Impact for Tech Partners







## TRAVEL & HOSPITALITY

# Employee Experience and Engagement

Employees are a tier-one asset, the first line of defense and the glue that holds companies together. If they are unhappy, service will suffer.

During the pandemic, projects took longer and were more difficult to manage among the travel & hospitality sector. Employee burnout and attrition were at an all-time high.

Improving employee engagement must bridge the gap between high technology and high touch customer service. Digital workers today will not settle for bad workplace

technology. Nearly half of workers (49%) say they are likely to leave their current job if they are unhappy or frustrated with workplace tech.

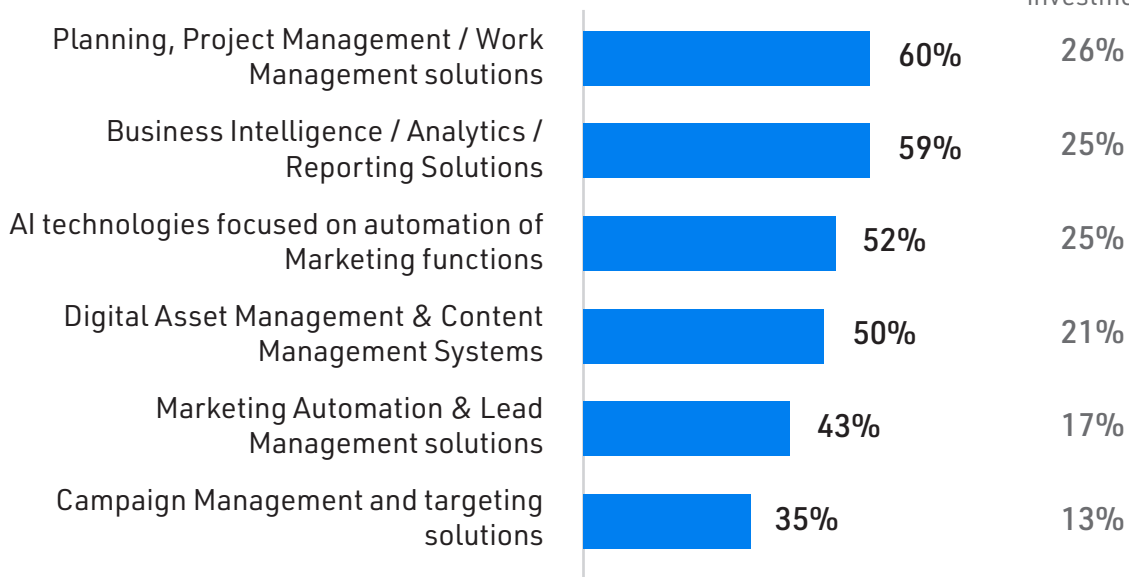
Because of its impact on reducing time to market, increasing profitability, attracting and retaining top talent and improving inefficiencies, employee experience tools are becoming table stakes for travel & hospitality companies. Seventy-three percent of brands today agree they operate in silos that impact scalability.

**Work Management is the biggest technology-driven priority just ahead of BI and Analytics. Almost universally across categories, 75%+ have yet to make a significant investment.**

### Software critical to future success

Next 3 years

Made  
significant  
investment



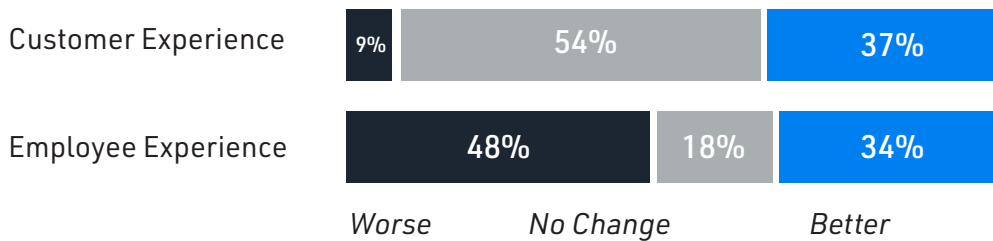


*"Though a work management tool was on our radar prior to COVID, the need became much more urgent."*

*2022 Digital Marketing State of Technology Survey Respondent*

Travel & hospitality report the biggest divergence –positive shift of customer experience (56%) vs negative for employees (66%).

#### Impact of COVID on...



Managing scheduling conflicts, excessive meetings, and multiple project-related threads forces employees to do more detective work than necessary.

#### Challenges of Collaboration



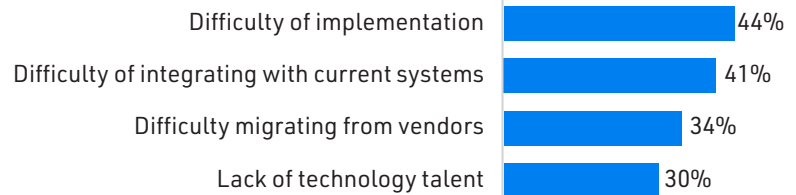


While all of these issues are considered at least somewhat challenging, marketing departments are particularly concerned with a lack of integration across their technology landscape.

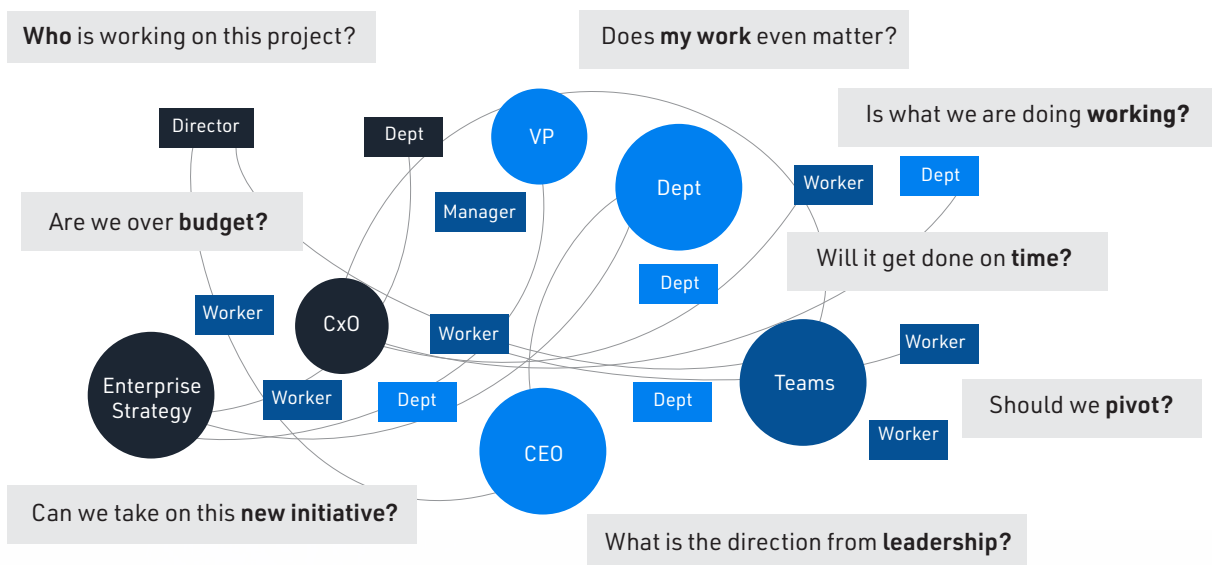
### Difficulty in Addressing Top Marketing Issues

- 1 Lack of integration across multiple point solutions
- 2 Overlaying customer preferences for communication on top of first party data to build trust
- 3 Adapating to a cookie-less ecosystem with the expectation that cookies are to be eliminated by 2023

### Barriers to Greater Tech Investment



At the end of the day, employees want to know that their work matters and how it ties into overall organization goals and structure. Work Management tools enable visibility and strategic action.





## TRAVEL & HOSPITALITY

# Personalization at Scale Through Automation

The top challenges to personalization are often an inability to integrate data, limited in-house resources, scalability across channels and lack of internal agility to act quickly on recommendations. Manual processes and broken communication only get in the way. Every customer data point is an opportunity to influence a buying decision and personalization at scale is key to meeting customers where they are in the customer journey. As the market continues to shift, marketing teams need to constantly replan and re-align to initiatives on the fly.

When marketing teams need to scale a campaign across 34+ different touchpoints to optimize personal and contextual experiences and deliver it down to the millisecond to all channels, automation needs to take over. If teams are only used to working in their own systems, they don't know how automation can enable a new world of cross-functional collaboration and connected work that

unlocks the next level of value for customers, companies and employees.

Most importantly, a connected ecosystem allows organizations to understand how their campaigns are performing in a more comprehensive sense and pivot more quickly. They need the ability to inventory assets and re-use what they've already created across subsets to save time, money and unnecessary re-work because of designs.

An ideal work orchestration solution is iterative in nature and encompasses all tasks, stakeholders and teams. It manages the entire lifecycle of marketing and is a single source of truth to provide the workflow management foundation necessary to achieve personalization at scale.

Ensuring all roads lead the consumer to the right message requires connective marketing tissue between enterprise systems and the work and content disseminated across channels

1.9x

Brand awareness

2.2x

Email open rate

1.7x

Return on ad spend

2.3x

Customer lifetime value

1.5x

Employee satisfaction

1.9x

Customer retention

1.7x

Customer satisfaction rates

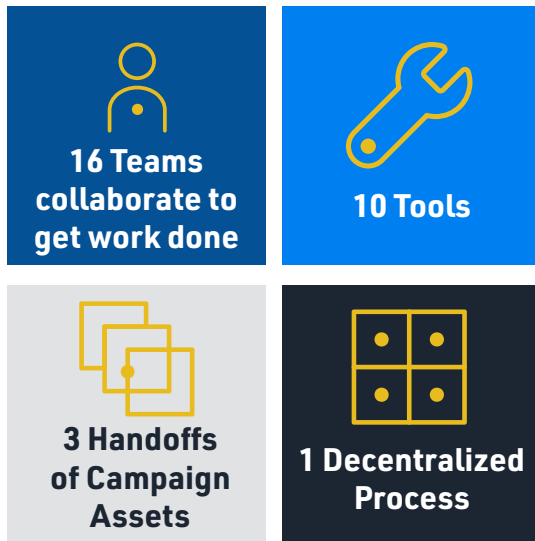
3.1x

Repeat visitors



Ensuring all roads lead the consumer to the right message requires connective marketing tissue between enterprise systems and the work and content disseminated across channels.

Marriott International's Michele Cascone implemented a new marketing system of record that could centralize processes and free employees from time-consuming practices through automation.



## BEFORE

*When your team nicknames the spreadsheet to manage co-branded credit card partnerships "The Beast" you know it's time for a new way to work.*

## AFTER

One Automated Marketing System of Record Provides Centralized Processes for Everything and Everyone

Adopting Adobe Workfront will bring Marriott's co-branded credit card marketing program one step closer to personalization at scale.

Workflow Automation Estimated  
Impact to Resources

**12 FTE's**  
saved

**25K Hours**  
saved



## Industry Expert Closing Thoughts



"Despite personalizing the shopper journey being a stated top strategic goal for most companies, only 1% of firms have a unified customer profile. Personalization is a cross-company function with an underpinning of revenue management. Without automation and scalability across people, process and technology, digital transformation maturity will simply not happen."

**Julie Hoffman,**  
Global Head of Industry Strategy & Marketing  
Travel & Hospitality, Adobe



"Success requires making systems work for you, not against you. Companies like Marriott International are empowering internal change agents to uncover what is working and what isn't to drive digital transformation and personalization faster for employees, customers, and co-branded partners."

**Jen Krempa,**  
Global Head of Delivery, LeapPoint





### About Adobe

Adobe Workfront is enterprise work management software that connects work to strategy and drives better collaboration to deliver measurable business outcomes. It integrates people, data, processes, and technology across an organization, so you can manage the entire lifecycle of projects from start to finish. By optimizing and centralizing digital projects, cross-functional teams can connect, collaborate, and execute from anywhere to help them do their best work.

To discover more about the tools you need to succeed at every step of the customer journey, visit [www.adobe.com](http://www.adobe.com).



### About LeapPoint

LeapPoint Consulting is changing the way companies connect work, technology, and talent to solve big business challenges and drive successful outcomes. Established by Big 4 alumni who sought more flexibility and agility in meeting clients' most critical business needs, LeapPoint is committed to making life and experiences fundamentally better for employees, customers and those they serve.

As the go-to Adobe and Adobe Workfront partner in financial services, healthcare, travel & hospitality, retail, and more, LeapPoint's break-through Connected Work<sup>®</sup> services are the essential framework for driving experiences that deliver business outcomes that matter.

To learn more about LeapPoint and our promise of Connected Work<sup>®</sup> for powerful experiences, visit [www.leappoint.com](http://www.leappoint.com) or email [info@leappoint.com](mailto:info@leappoint.com).

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