Net Economic Impact

Sonoma County
November 2021

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NEI FOR TOURISM

Showcase how digital media drives your destination economy

Influence travelers at every stage
Create destination demand

Attract with powerful, inspiring creative
Deliver relevant ads to every traveler

Learn from every interaction with a potential visitor
Make intelligent decisions on who, what and how to talk with potential visitors

Measure your marketing impact on your destination
Show value of marketing to stakeholders with category spend insights

HOW DOES NEI WORK

Client defines geographic parameters of target visitors

Measure specific areas

Optimized audience is built

Demographic behavioral residential

Individual is messaged

Exposed individual travels to destination & spends

Visitation within 90 days of impression

Behavior captured in NEI report

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EXECUTIVE SUMMARY

CAMPAIGN FLIGHT: MAY 12, 2021 – JULY 31, 2021 (81 DAYS)
MEASUREMENT WINDOW: MAY 12, 2021 – SEPTEMBER 30, 2021 (142 DAYS)

Objective:

Drive awareness and visitation to Sonoma County. Leverage unique cross-device display, video and rich media creative to identified-engage users. Measure visitation and visitor spend in Sonoma County – specific measurement areas- using Net Economic Impact (NEI) reporting

Strategy/Targeting

- **Employ Epsilon's Transactional data to reach likely travelers to Sonoma County, while also driving strong site traffic and user engagement.**
- **Overlay Sonoma County's key audiences: Foodie | Outdoor | Wellness and focus efforts into drive, regional and fly markets into Sonoma County.**

$177:1
Measured ROAS

$19.5M
Measured Revenue

$110K
Marketing Investment

9.6M
Impressions Delivered

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CAMPAIGN METRICS

$19.5M
total messaged revenue

$110K
investment

$177:1
ROI

1.8M
unique <u>individuals</u> reached

71.9K
total visitors

4.1%
messaged traveler rate

206K
total transactions
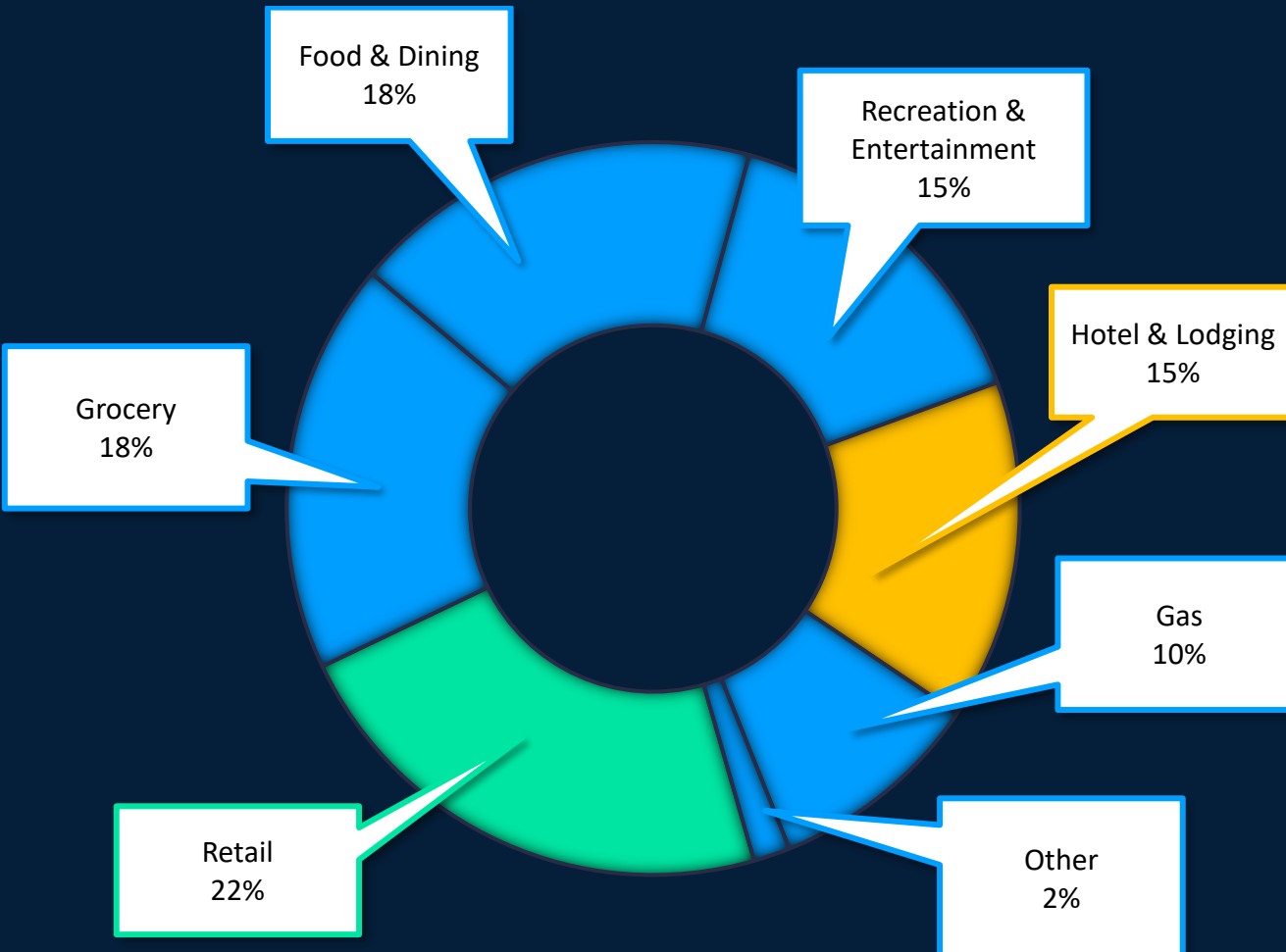
2.9
average purchases per visitor

$271
average messaged yield per visitor

Note: NEI measures on average about 50-60% of non-cash transactions
Measurement Window: May 12, 2021 – September 30, 2021

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LIST OF CATEGORIES

Category	Definitions
Hotel & Lodging	Hotels & Lodging
Food & Dining	Restaurants & Bars
Grocery	Grocery Stores & Specialty Markets
Retail	General Merchandise, Health & Medical, Home Improvement & Supplies, Personal Services, Specialty Stores, Goods & Services
Gas	Automotive, Other (Transportation)
Other	Education, Recreation & Entertainment, Travel, Professional Services

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REVENUE BY CATEGORY

Food & Dining
18%

Recreation &
Entertainment
15%

Hotel & Lodging
15%

Grocery
18%

Gas
10%

Retail
22%

Other
2%

15% of measured revenue came from **Hotel & Lodging** spending

- Hotel & Lodging ROI: $20:1
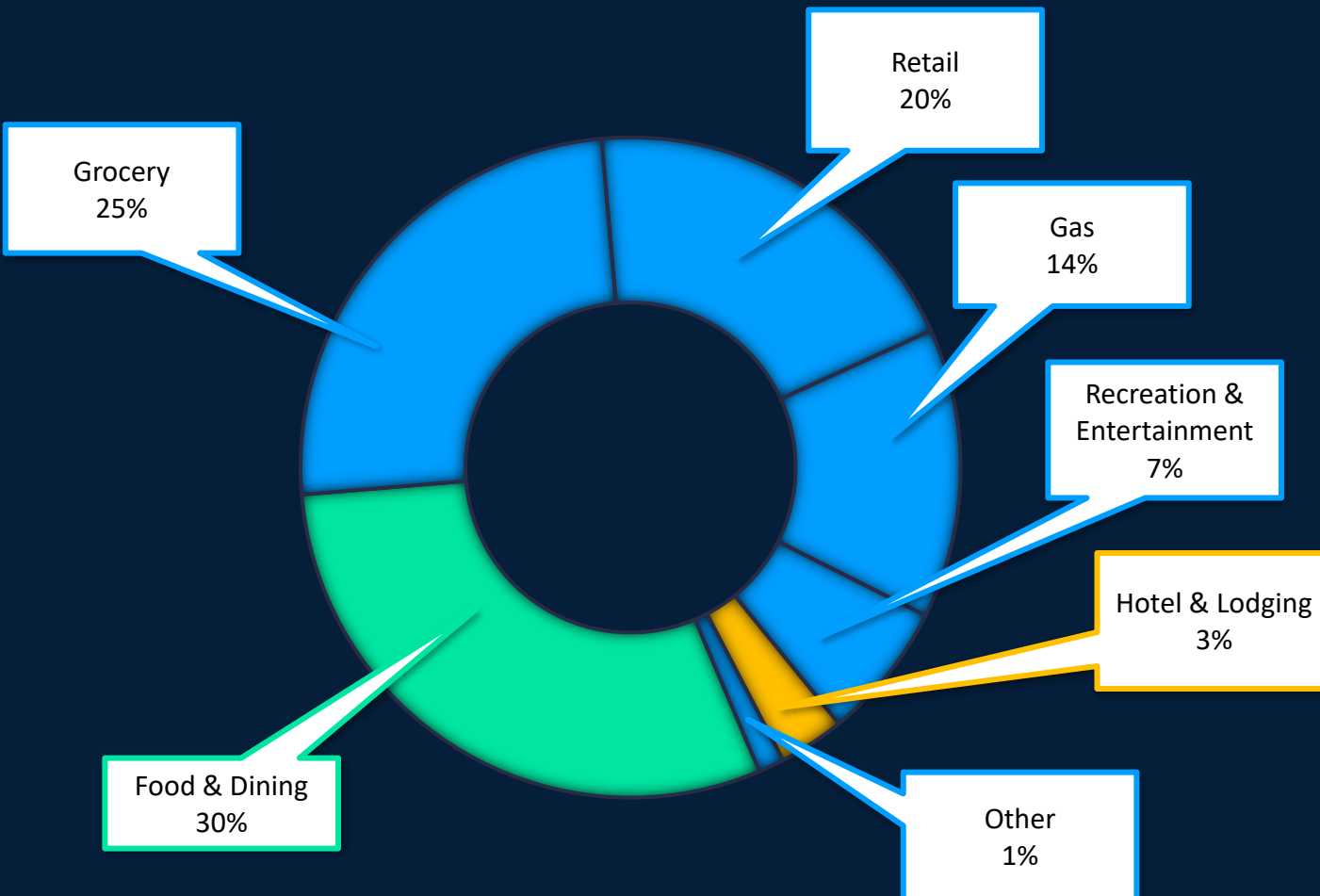- Top Hotels: Fairmont Hotels, Best Western Hotels, Hyatt Hotels, Sheraton, Doubletree Hotels

22% of measured revenue came from the **Retail** category

- Retail ROI: $30:1

$19.5M total revenue

Measurement Window: May 12, 2021 – September 30, 2021

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TRANSACTIONS BY CATEGORY

Retail
20%

Grocery
25%

Gas
14%

Recreation &
Entertainment
7%

Hotel & Lodging
3%

Food & Dining
30%

Other
1%

3% of all transactions occurred in the **Hotel & Lodging** category
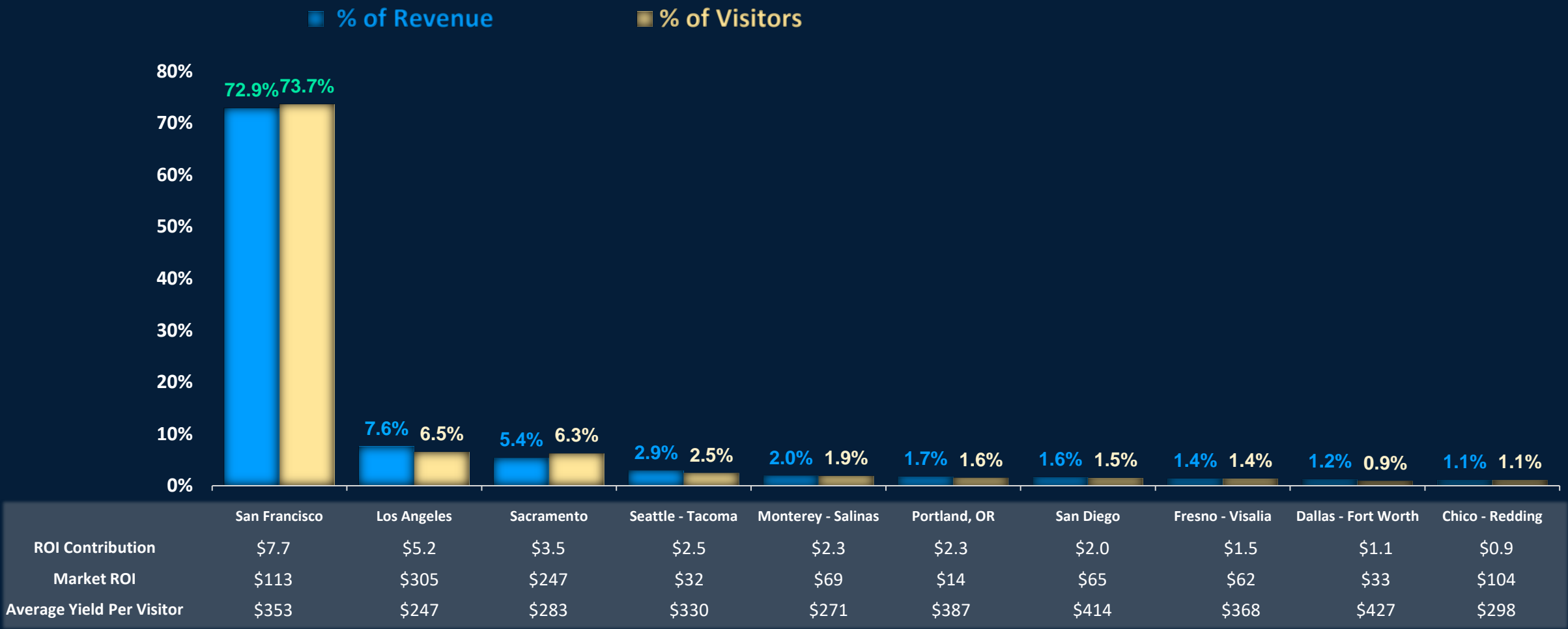- Hotel AOV: $386

30% of all transactions were made within the **Food & Dining** category
- Food & Dining AOV: $50

206K total transactions

Measurement Window: May 12, 2021 – September 30, 2021

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REVENUE BY FEEDER MARKET

■ % of Revenue   ■ % of Visitors

Chart: % of Revenue and % of Visitors by market:
- San Francisco: 72.9% / 73.7%
- Los Angeles: 7.6% / 6.5%
- Sacramento: 5.4% / 6.3%
- Seattle - Tacoma: 2.9% / 2.5%
- Monterey - Salinas: 2.0% / 1.9%
- Portland, OR: 1.7% / 1.6%
- San Diego: 1.6% / 1.5%
- Fresno - Visalia: 1.4% / 1.4%
- Dallas - Fort Worth: 1.2% / 0.9%
- Chico - Redding: 1.1% / 1.1%

|	San Francisco	Los Angeles	Sacramento	Seattle - Tacoma	Monterey - Salinas	Portland, OR	San Diego	Fresno - Visalia	Dallas - Fort Worth	Chico - Redding
ROI Contribution	$7.7	$5.2	$3.5	$2.5	$2.3	$2.3	$2.0	$1.5	$1.1	$0.9
Market ROI	$113	$305	$247	$32	$69	$14	$65	$62	$33	$104
Average Yield Per Visitor	$353	$247	$283	$330	$271	$387	$414	$368	$427	$298

- **72.9%** of measured non-local revenue generated in Sonoma County came from the **San Francisco** DMA; Additionally, that measured revenue was driven by **73.7%** of visitors

- **Los Angeles, Seattle – Tacoma, Monterey – Salinas, Portland, San Diego,** and **Dallas – Fort Worth** represent feeder markets that have a high revenue yield; these individuals contribute to a large portion of revenue per visitor compared to other feeder markets

Note: Only top 10 non-local feeder markets that were delivered impressions shown here; total of all 10 may not equate to 100% or total ROI amount, some DMAs may represent re-targeting from delivery in targeted DMA
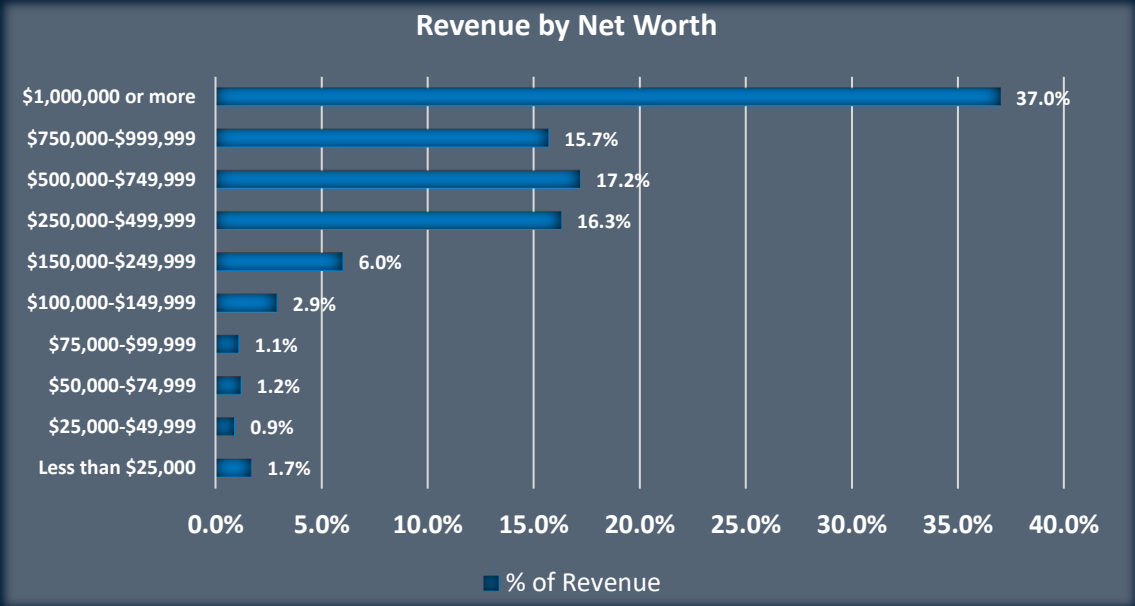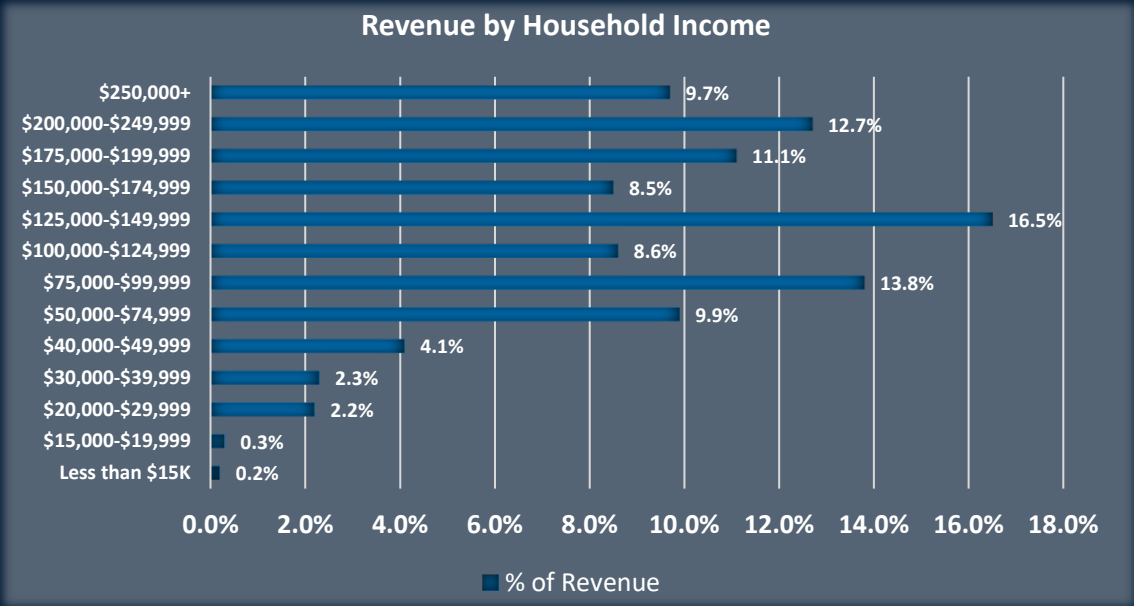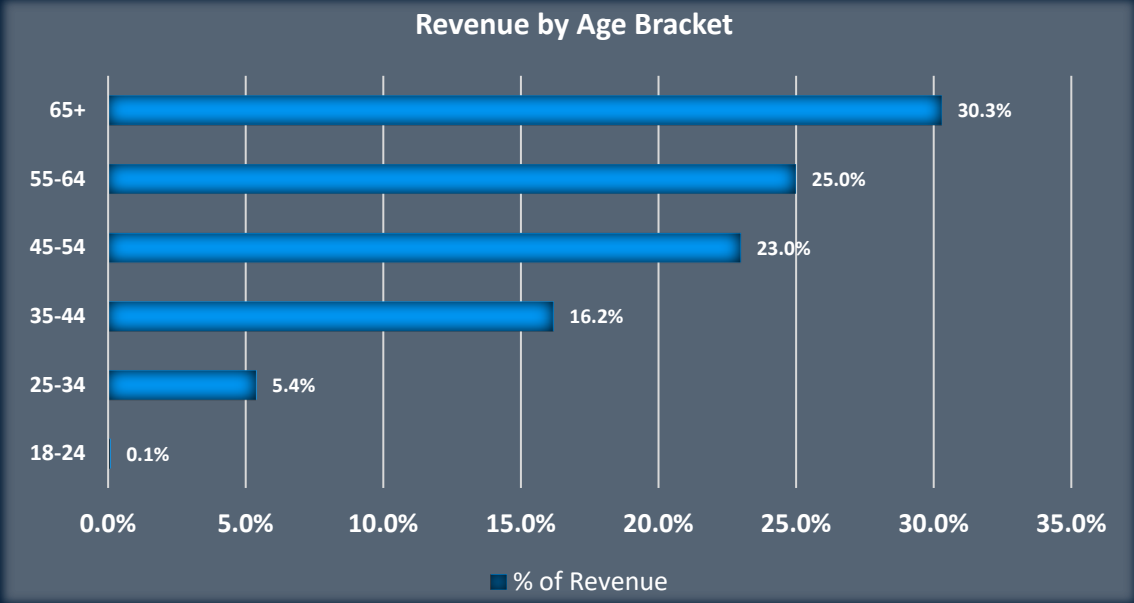
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TOP PERFORMING ZIP CODES

Measurement Window: May 12, 2021 – September 30, 2021
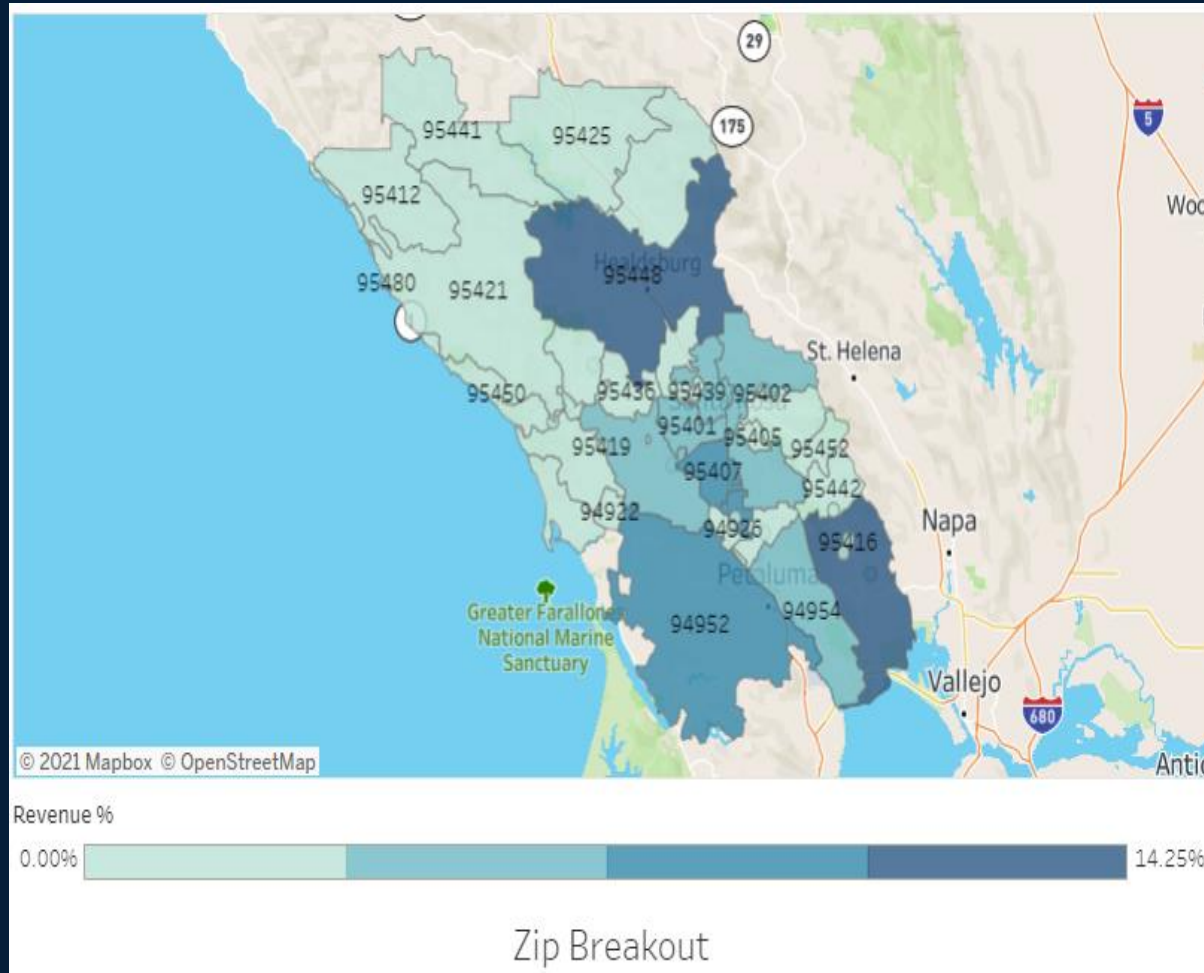
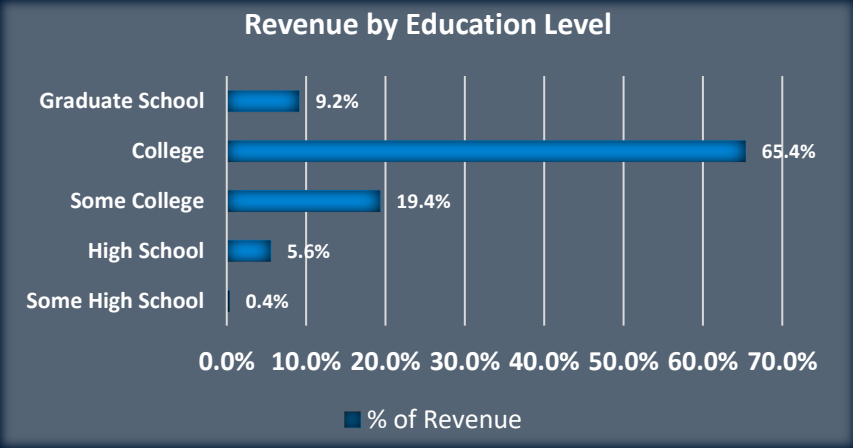| ZIP	Features	Revenue	Visitors	Revenue %	Yield Per Visitor
95476	Sonoma	$2,778,628	7,273	14.25%	$382
95448	Healdsburg	$2,439,343	5,081	12.51%	$480
95407	Santa Rosa	$2,027,911	6,109	10.40%	$332
94928	Rohnert Park	$1,721,775	7,324	8.83%	$235
94952	Petaluma	$1,653,528	7,769	8.48%	$213
95403	Santa Rosa	$1,169,949	4,866	6.00%	$240
95401	Santa Rosa	$1,101,702	4,485	5.65%	$246
94954	Petaluma	$857,962	4,125	4.40%	$208
95472	Sebastopol	$797,515	3,162	4.09%	$252
95404	Santa Rosa	$789,715	3,126	4.05%	$253

- **14.25%** of measured revenue generated in Sonoma County came from the **95476** ZIP code; Additionally, that measured revenue was driven by **7,273** visitors spending within the **95476** ZIP code

- **95448** ZIP code also drove the highest yield per visitor at $480

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VISITOR DEMOGRAPHICS

Revenue by Age Bracket

Age Bracket	% of Revenue
65+	30.3%
55-64	25.0%
45-54	23.0%
35-44	16.2%
25-34	5.4%
18-24	0.1%

■ % of Revenue

Revenue by Net Worth

Net Worth	% of Revenue
$1,000,000 or more	37.0%
$750,000-$999,999	15.7%
$500,000-$749,999	17.2%
$250,000-$499,999	16.3%
$150,000-$249,999	6.0%
$100,000-$149,999	2.9%
$75,000-$99,999	1.1%
$50,000-$74,999	1.2%
$25,000-$49,999	0.9%
Less than $25,000	1.7%

■ % of Revenue

Revenue by Household Income

Household Income	% of Revenue
$250,000+	9.7%
$200,000-$249,999	12.7%
$175,000-$199,999	11.1%
$150,000-$174,999	8.5%
$125,000-$149,999	16.5%
$100,000-$124,999	8.6%
$75,000-$99,999	13.8%
$50,000-$74,999	9.9%
$40,000-$49,999	4.1%
$30,000-$39,999	2.3%
$20,000-$29,999	2.2%
$15,000-$19,999	0.3%
Less than $15K	0.2%

■ % of Revenue

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VISITOR DEMOGRAPHICS

Revenue by Marital Status

- Married: 66.0%
- Single: 34.0%

Axis: 0.0%, 20.0%, 40.0%, 60.0%, 80.0%

■ % of Revenue

Revenue by Gender

- Male: 48.4%
- Female: 51.6%

Axis: 0.0%, 20.0%, 40.0%, 60.0%

■ % of Revenue

Revenue by Education Level

- Graduate School: 9.2%
- College: 65.4%
- Some College: 19.4%
- High School: 5.6%
- Some High School: 0.4%

Axis: 0.0%, 10.0%, 20.0%, 30.0%, 40.0%, 50.0%, 60.0%, 70.0%

■ % of Revenue

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NEI GLOSSARY

Word / Metric	Definition	Calculation
Measured ROI	**Measured Return on Ad Spend:** The measured revenue captured in this NEI read divided by the measured value of impressions delivered	Measured Revenue / Measured Ad Spend
Measured Revenue	The amount of spend captured in measurement ZIP codes by individuals within 90 days of being served an impression • *Only spend from individual served an impression is captured* • *50-60% of non-cash transactions are captured*	NEI
Impressions Delivered	The amount of impressions specific to the flight dates of this NEI read	NEI
Unique Individuals Reached	Of the impressions delivered, the amount of unique, actual individuals those impressions are tied to (non-cookie based)	NEI
Total Visitors	Of individuals served an impression, the amount that had spend measured within a measurement ZIP within 90 days of being exposed to the campaign	NEI
Messaged Traveler Rate	The percentage of individuals exposed to the campaign that had spend measured within a measurement ZIP within 90 days of being exposed to the campaign	Total Visitors / Unique Individuals Reached
Total Transactions	The amount of transactions captured in measurement ZIPs by individuals served an impression within 90 days of exposure	NEI
Average Purchases Per Visitor	The average number of transactions coming from each measured visitor over the NEI read	Total Transactions / Total Visitors
Average Messaged Yield Per Visitor	The average amount of revenue coming from each measured visitor over the NEI read	Measured Revenue / Total Visitors
Average Order Value (AOV)	The average amount of revenue coming from each transaction	Measured Revenue / Total Transactions

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NEI GLOSSARY

Word / Metric	Definition	Calculation
Revenue by Category	Measured Revenue broken out by relevant tourism industries (Dining / Nightlife, Entertainment & Recreation, Gas / C-Stores, Grocery, Hotels, Local Services, Retail, Vacation Rentals / Services)	Revenue from Category / Measured Revenue
Transactions by Category	Total Transactions broken out by relevant tourism industries (Dining / Nightlife, Entertainment & Recreation, Gas / C-Stores, Grocery, Hotels, Local Services, Retail, Vacation Rentals / Services)	Transactions from Category / Total Transactions
Visitors by Category	Percentage of Total Visitors spending within relevant tourism industries (Dining / Nightlife, Entertainment & Recreation, Gas / C-Stores, Grocery, Hotels, Local Services, Retail, Vacation Rentals / Services)	Visitors Spending Within Category / Total Visitors
Revenue by Residential DMA	This slide provides the percentage of Measured Revenue and Total Visitors coming from the identified residential DMA of each Total Visitor. It also provides the percentage of impressions delivered to residents of identified DMAs. Depending on contextual or residential targeting, this slide can include more than just targeted markets.	DMA Revenue / Measured Revenue
Campaign ROI (DMA)	Each market's contribution to the Total Return on Ad Spend (ROI)	DMA Revenue / Measured Ad Spend (Total)
Market ROI (DMA)	Measured Revenue coming from each market divided by the amount spent on delivering media to residents of that market	DMA Revenue / DMA Spend
Average Yield Per Visitor (DMA)	Measured Revenue coming from each market divided by Total Visitors identified as residents of that market	DMA Revenue / DMA Visitors
Visitor Demographics	Percentage of Measured Revenue broken out by Age, Household Income, Gender, Marital Status and Education Level	Demographic Revenue / Measured Revenue
Top Performing Zip Codes	Features, Measured Revenue, Visitor spending, Total Measured Revenue % and Average Yield Per Visitor broken out by measurement ZIP codes	ZIP Revenue / Measured Revenue

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