Sonoma County Tourism
Sonoma County Board of Supervisors

Year in Review, Marketing Plan, Budget Presentation

June 8, 2021

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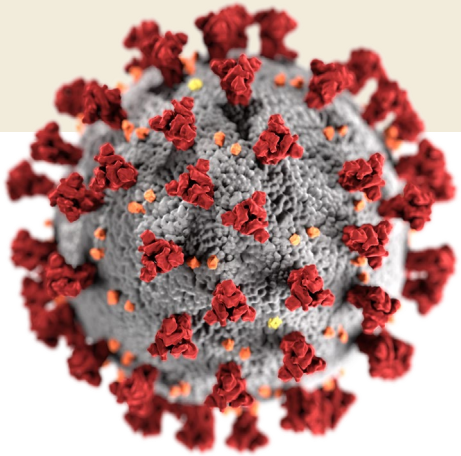

2020
What A Year It's Been

BE SMART & KIND
KEEP
SONOMA COUNTY
• CALIFORNIA •
SAFE
STAY HEALTHY

A Quick Look Back

- 2020 was off to a great start
  - 2019 Wine Enthusiast Wine Region of the Year

    "… Sonoma County is renowned for producing high-quality wines of distinction. The region is also a standard-bearer for best practices beyond just wine production, as a champion of true sustainability."
  - Forbes Top 20 Travel Destinations
  - Fodor's Readers Choice Favorite Destination
  - Solid Growth in Hotel Occupancy/Revenue
  - Start of the "In Bloom" Spring Campaign – focused on the pivot to driving Spring leisure and business travel…
  - Group Business destination lead volume was up 18% Year On Year
    - 17,479 tentative room nights in the market between June and December

COVID-19 Response Phased Approach

1. Gain Insights and Initiate Internal Response
2. Engage and Assist
3. Monitor Health Issues/Protocols
4. Prepare for Recovery

Engage, Assist, Communicate

Engage and Assist - Local Marketing Support

Restaurant/Beverage Industry

- Maintained list of wineries, breweries, cideries, and distilleries offering curbside pickup or delivery services
- Supported Sonoma County Vintners' Sip from Home program
- Throughout the shelter in place, SCT uploaded shipping deals into the extranet
- Coordinated listing of business opening hours – conveyed via website

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Engage and Assist – Local Residents

- Engaged in social media conversations about concerns around people coming in – Labor Day pain points.
- CTAs continue to be an important champion group, social media, distribution of various materials.
- Safe Travels Promise

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Communicate

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Partner Alert

SIGN THE TRAVEL KINDLY PLEDGE | BECOME A CTA | VISIT THE PARTNER EXTRANET

This special partner communication is dedicated to providing information regarding the fluid situation surrounding the coronavirus and its continued impact on domestic and international travel.

June 12, 2020

We are delighted that tasting rooms, wineries and craft beverage locations are allowed to welcome enthusiasts without a food element and that restaurants and retail are opening their doors. In Sonoma County life is definitely opening up! We recognize we have a long way to go to bring the county out of a deep economic chasm, but SCT is committed to working with our partner businesses, local residents and interested travelers to reenergize the economy and welcome people seeking the extraordinary experiences found in our beautiful region. I, for one, will be at a tasting room (or two!), this weekend enjoying Sonoma County's amazing wines. We look forward to additional openings soon!

Claudia Vecchio
President and CEO
Sonoma County Tourism
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Safe Travels Promise Seal & Collateral

Sonoma County Tourism is delighted to unveil the Keep Safe seal and support collateral for the Safe Travels Promise. The seal was designed by Bob Pullum in collaboration with a number of Sonoma County chambers, visitor centers, and other stakeholders.

As we prepare to welcome visitors back to Sonoma County, we understand the importance of communicating our health and safety protocols. It's going to be up to all of us to respectfully but effectively make clear the expectations of safety and responsibility in our destination.

You can help by adopting the Keep Safe seal and displaying it on your website, newsletters, flyers — anywhere you think might spread the message. We appreciate your support in getting this in front of as many eyes as possible.

We will soon have this collateral, including the seal and Safe Travels Promise, available to download for your unrestricted use.

The Safe Travels Promise and Keep Safe seal are available to order (free of cost) as posters, window clings, bookmarks, and postcards.

These materials can be ordered through the partner extranet here. If you do not have a partner account with us, please contact Katja West at kwest@sonomacounty.com

Contact-less drop off or pick up of orders will be available on select dates next week. Details can be found on the partner extranet.

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Vaccine & Testing update

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SONOMA COUNTY TOURISM

March 26, 2021

CCINES

ing April 1, 2021, individuals age 50-64 years old will be eligible for COVID-19 s. Beginning April 15, 2021, **every Californian age 16 and older** will become for COVID-19 vaccines.

you are a restaurant/tasting room employee, vaccines are still available through 1 re Diagnostics by clicking here. Please read and make use of this Critical rmation and Appointment Checklist prior to your vaccination.

u are a restaurant manager or owner who would like to make block ointments for your employees, please complete this form.

ugh eligibility for vaccinations does not yet extend to all tourism/hospitality rs, if you are interested in forthcoming block appointments for your yees, fill out this form. Please note that this form is designed to be filled out business, not an individual employee.

Questions may be directed to vaccine@sonomacounty.com.

Visit socoemergency.org/vaccine for a list of vaccine providers, and myturn.ca.gov for additional vaccine resources and information.

Sonoma County Tourism will continue to provide updated communications about vaccines and testing as things continue to change.

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TOURISM INDUSTRY PERFORMANCE & INSIGHTS

STR Tracking for Sonoma County

	May 24-May 30		May 31-June 6		Running 28 days	
	Current Week	Current Week % change	Current Week	Current Week % change	Month	% change
Occupancy (%)						
Sonoma County General	41.6	-44.7	44.1	-44.7	41.1	-47.5
Sonoma County Full Service	31.2	-57.2	33.0	-58.0	29.6	-61.6
Average from other destinations	35.3	-47.8	36.9	-48.8	33.6	-52.1
Average Daily Rate (ADR)						
Sonoma County General	99.93	-49	106.14	-44.3	101.99	-48.2
Sonoma County Full Service	112.39	-57.1	121.51	-52.2	117.61	-55.3
Average from other destinations	98.70	-51.7	108.25	-44.3	98.96	-51.1
Revenue Per Room (RevPAR)						
Sonoma County General	41.53	-71.8	46.79	-69.2	41.94	-72.8
Sonoma County Full Service	35.07	-81.6	40.15	-79.9	34.82	-82.9
Average from other destinations	33.88	-73	38.20	-70.1	32.16	-74.7

Things to Note:

- 49 of the county's 112 hotels report to STR
- The average from other destinations includes: Napa, Palm Springs, Monterey, South Lake Tahoe, and Vallejo/Napa Valley
- For more information on how data is calculated due to hotel closures, please refer to this document

Smith Travel Research (STR) is the recognized leader in hospitality industry benchmarking around the globe. Powered by the world's largest hotel data sample, they deliver confidential data, accurate and actionable insights, and comprehensive solutions to empower decisions. **Discover how STR collects data, how it is calculated, and a glossary of terms, by clicking here.**

Today's Takeaways

From SCT's director of marketing systems & insights, Ariane Hiltebrand

This week, Destination Analysts are seeing more steps towards a positive travel sentiment among American travelers. 36.7% of American travelers already have very well-developed travel plans and 39.7% have somewhat developed travel plans. Beaches and resorts still top the list of trip destinations, followed by staying with family and friends, and then visiting rural destinations and parks.

This shows a continuous trend towards wellness-type vacations and reconnecting with family and friends. 49.2% indicate that personal safety plays a major role in destination choice, which makes it important that destinations clearly implement and communicate health

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Happy National Travel and Tourism Week

It is remarkable to consider this is our second National Travel and Tourism Week (NTTW) to occur during the pandemic. Established in 1983 by President Reagan, NTTW is the annual salute to travel in America. During the first full week in May, communities nationwide unite around a common theme to showcase travel's contributions to the economy and American jobs. This year, the travel industry celebrates the "Power of Travel" to remind media, elected officials, and the public how tourism will play a vital role in driving America's recovery.

The "Power of Travel" theme offers us the opportunity to honor the ingenuity, resilience, grit, and creativity of our hospitality businesses over the past year, and allowed us to put a face and a story to some of the individuals who have persevered.

We encourage you to explore the programs Sonoma County Tourism developed in appreciation of this important week for our industry. We have businesses lighting buildings in Pinot Purple (purple being the official color of hospitality), school children channeling their love of travel and Sonoma County through art, and are featuring a Resiliency Showcase consisting of video interviews with hospitality partners paired with a variety of incredible pieces by local artists.

We hope you'll share these items with your peers and join us in our collective celebration of the "Power of Travel."

Kelly Bass Seibel
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2020 – Economic Impact

- Travel in Sonoma County was significantly impacted in 2020 both by the COVID pandemic and the policies implemented to limit the spread of the virus.

- The $1.1. billion in travel related spending was down 49% from 2019 and generated 45% fewer local and state tax dollars.

- With business owner's use of CARES Act assistance combined with their other efforts to minimize layoffs, employment was impacted less severely than spending but still fell by 27% year over year.

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2020 – Economic Impact

	Spending $M	Earnings $M	Employment	Local Taxes $M	State Taxes $M	Total Taxes $M
2016	1,975	684	20,880	84	84	168
2017	2,084	767	22,508	97	85	182
2018	2,200	815	22,376	108	91	199
2019	2,237	863	22,358	110	95	205
2020	1,137	652	16,264	63	49	112
% Change 19-20	-49%	-24%	-27%	-43%	-48%	-45%

Source: Dean Runyan Associates

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Sonoma County Area Impacts - 2020

	Spending $M	YoY Change	Earnings	Employment	Local Taxes $M	State Taxes $M	Total Taxes $M
Cloverdale	8.4	-45%	4.8	121	0.5	0.4	0.8
Healdsburg	65	-62%	37	929	3.6	2.8	6.4
Petaluma	106	-49%	61	1,521	5.9	4.6	10
Rohnert Park	105	-48%	60	1,495	5.8	4.5	10
Santa Rosa	244	-48%	140	3,486	13	11	24
Sebastopol	17	-45%	10	245	0.9	0.7	1.7
Sonoma	81	-50%	47	1,162	4.5	3.5	8
Unincorp.	461	-47%	264	6,595	25	20	45
Windsor	50	-51%	28	710	2.7	2.2	4.9
TOTAL	1,137	-49%	652	16,264	63	49	112

Source: Dean Runyan Associates

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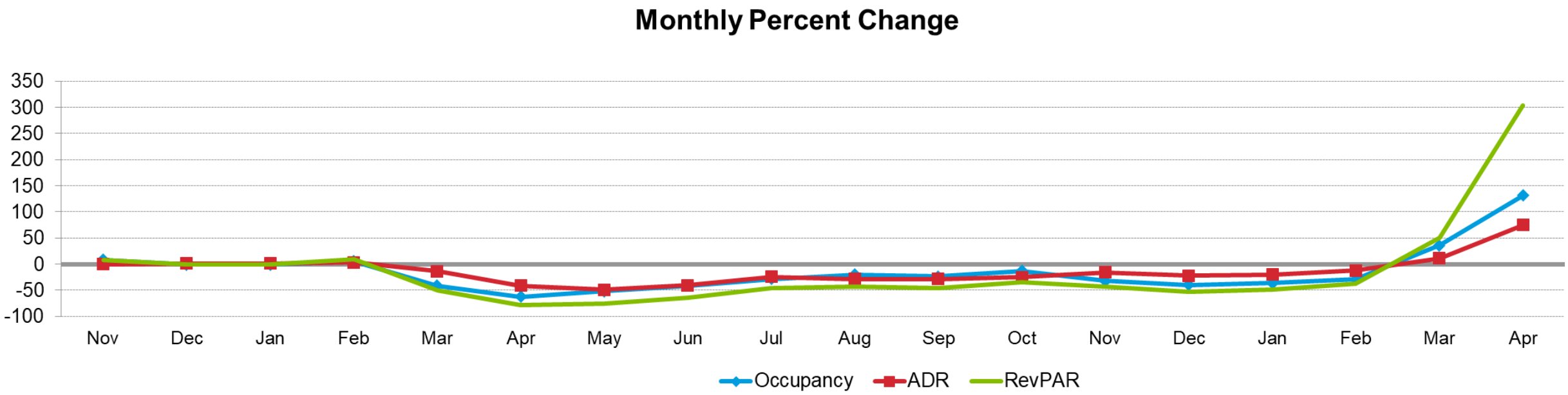
STR Report Lodging Performance 2019-2021



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FY 20-21 Revenue Analysis

	July – Sept 2020			Oct. – Dec. 2020			Jan. – March 2021			April – June 2021		
	Actuals/Forecast	Budget	Variance	Actuals/ Forecast	Budget	Variance	Actuals/ Forecast	Budget	Variance	Actuals/ Forecast	Budget	Variance
BIA	1,044,750	798,474.26	246,276.30	776,673.77	907,760,82	-131,087.05*	593,620.48	796,736.38	-203,115.90**	1,027,208.95	1,150,969.07	-123,760.12**
TOT	686,129.79	380,164.50	305,965.29	272,705.00	248,924.31	23,780.69**	307,732.54	384,811.42	-77,078.88	541,238.37	606,447.81	-65,209.44**
Total	1,730,880.35	1,178,638.7	552,241.59	1,049.378.77	1,156,685.13	-107,306.36	901,353.02	1,181,547.80	-280,194.78	1,568,447.32	1,757,416.88	-188,969.56

* Actual revenue not received so number reflects forecasted revenue recorded
** Actual revenue received in full

Funds Received (March 2021) not accounted for in FY19-20

Santa Rosa BIA	Jul – Sept 2019	$12,801.51
Santa Rosa BIA	Oct – Dec 2019	$6,173.51
Santa Rosa BIA	Jan – Mar 2020	$32,927.35
Santa Rosa BIA	Apr – Dec 2020	$31,755.78
Total		$83,658.00

FY 2019-2020 KPIs

- Revised Strategic Plan
- Ideal: Reach pre-COVID-19 industry performance
- Realistic:
  - Continue monitoring COVID-19 environment, continue robust outreach and innovate as needed for three key audiences:

    1. Visitors
       1. Leisure: Increase engagement across all digital channels, generate high level of inquiry among key advertised markets.
       2. Business: Create and market incentive program, enhance partner insights, manage lead generation to meet market needs.
    2. Partner Businesses – provide ongoing insights and business building/cooperative opportunities.
    3. Local Residents – continue to engage, listen, monitor sentiment, provide information as needed. Engage CTAs to convey SCT messages and monitor sentiment.

Road to Recovery 2021

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Sonoma County Once Again Recognized…

- *New York Times*: Santa Rosa one of its Places to Love in 2021
- *Conde Nast Traveler*: Healdsburg is among "21 Places to Go" in 2021
- *Forbes*: Sonoma County "Bucket List" Top 21 Destinations for 2021
- *Travel + Leisure*: 50 Best Places to Travel in 2021
- *Bloomberg Pursuits*: Where to Go in 2021
- *Harper's Bazaar*: 20 Places to Travel in 2021
- *US News*: Sonoma just recognized as one of the "Best Small Towns to Visit in the USA"

Forbes The New York Times Condé Nast Traveler

Coronavirus Travel Sentiment Index

Destination Analysts

Insights from American Traveler Survey Report by Destination Analysts - May 25, 2021

TAKEAWAYS

1. The Memorial Day weekend looks promising, with nearly a quarter of American travelers expecting to take a trip. Many, however, express concern that their trip could be marred by negatives such as crowding, closed restaurants, etc.
2. The strongly positive traveler sentiment we have seen in recent months continues unabated.
3. Recent travelers report their trip experiences frequently are not normal, when compared to pre-pandemic travel. Despite this, satisfaction levels with recent travel experiences remain largely positive.
4. The proportion of travelers having received a COVID-19 continues to grow, but slowly.

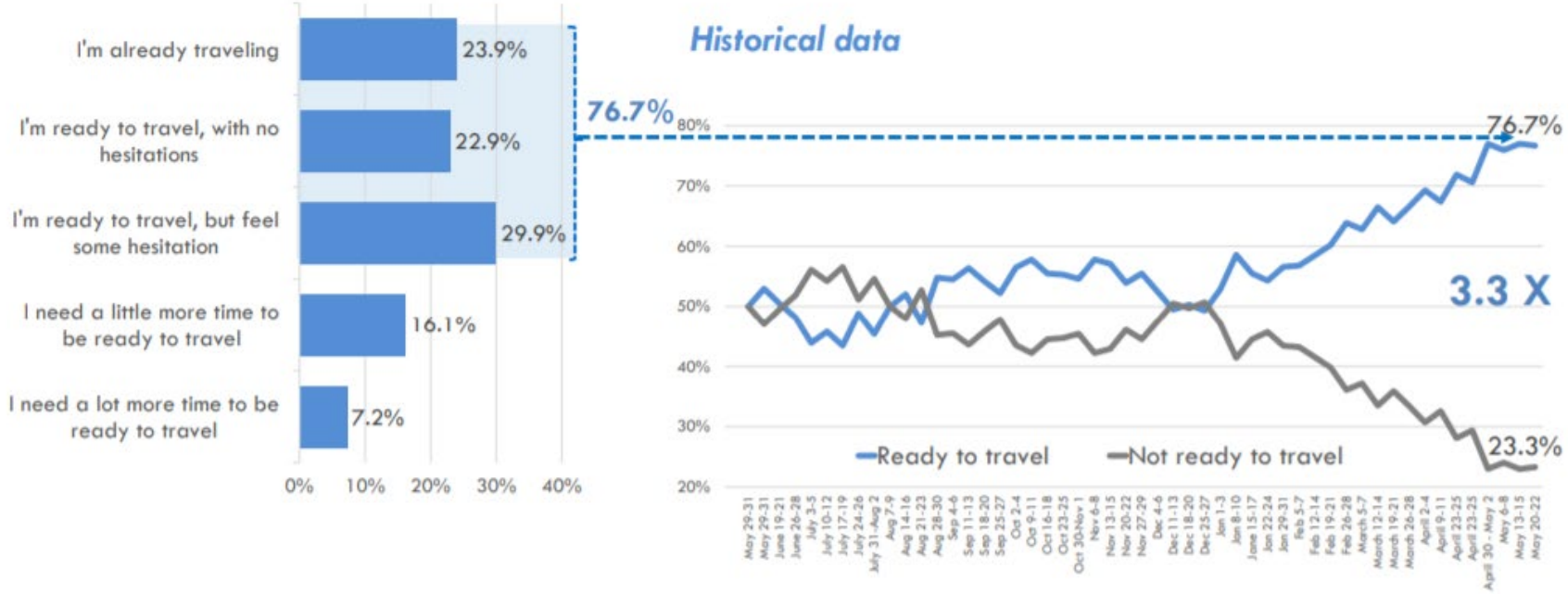
Link: https://www.destinationanalysts.com/covid-19-insights/covid-19-webinars/may-25th-update-on-covid-19s-impact-on-american-travel/

Source: Destination Analysts

Destination Analysts

TRAVEL STATE-OF-MIND

Question: When it comes to getting back out and traveling again, which best describes your current state of mind? (Select one)



Destination Analysts

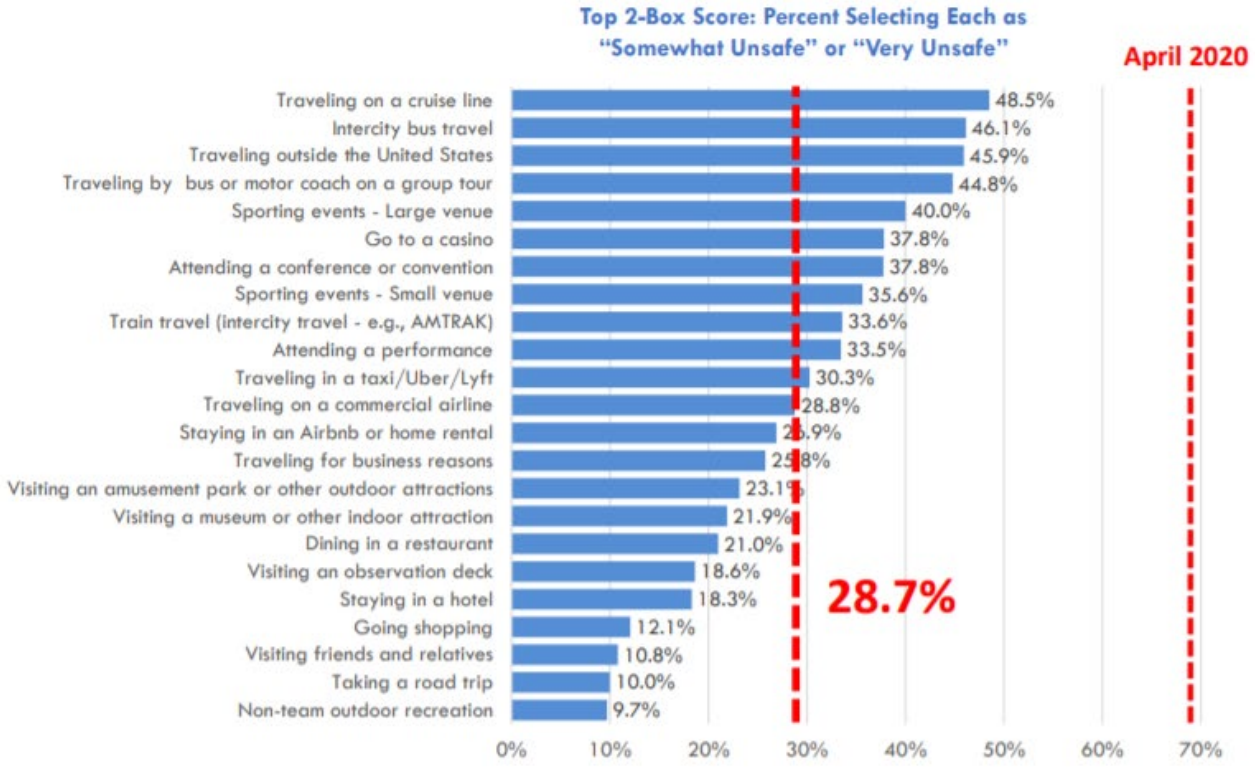
Source: Destination Analysts

Destination Analysts

PERCEIVED SAFETY OF TRAVEL ACTIVITIES (WAVE 63)

Question: At this moment, how safe would you feel doing each type of travel activity?

(Base: Wave 63 data. All respondents, 1,201 completed surveys. Data collected May 20-22, 2021)



Destination Analysts

Source: Destination Analysts

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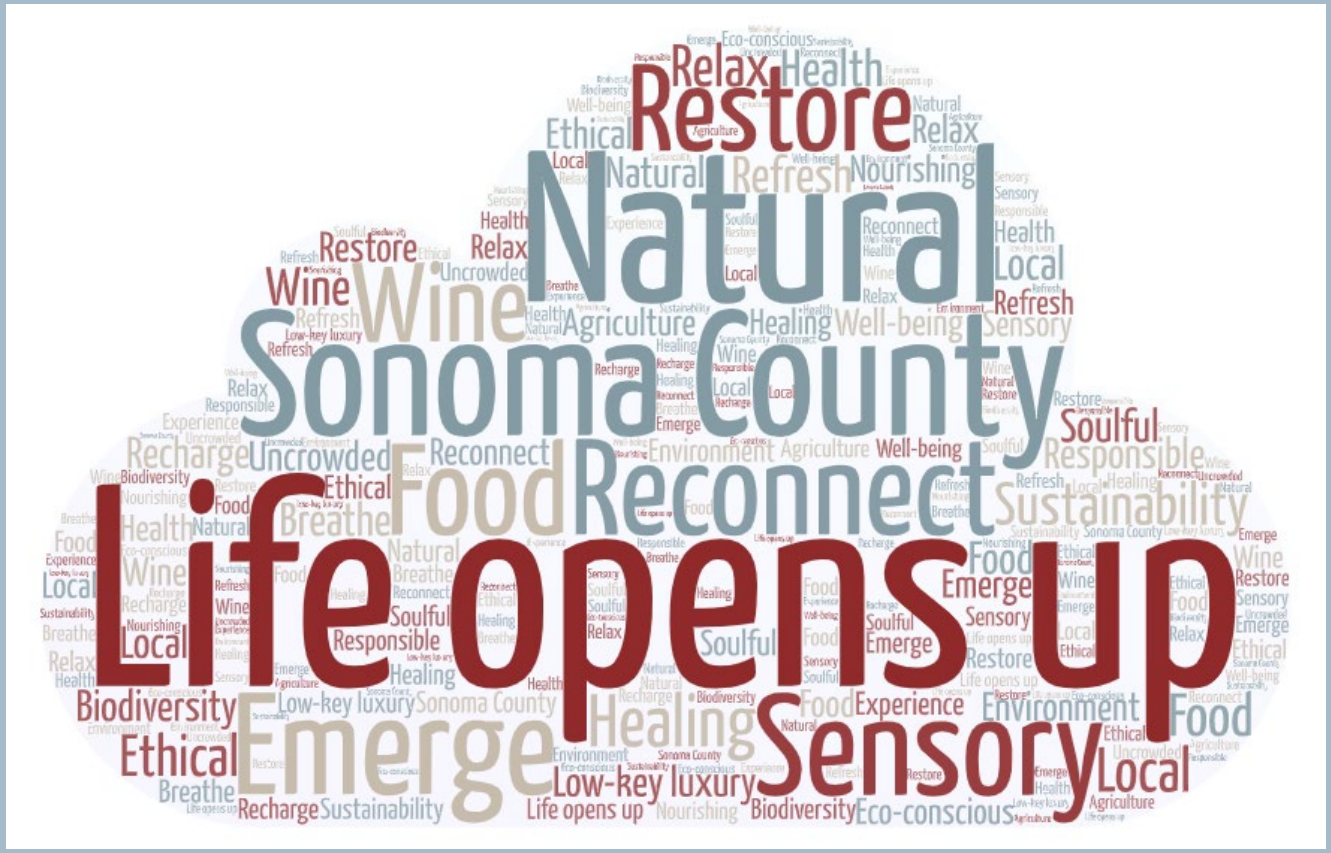
Campaign Keywords



Marketing, Advertising, PR Expenditures

- Paid Advertising
- Marketing Materials and Distribution
- Trade Shows and Sales Missions - Monitoring
- Sales and Marketing Promotions - Monitoring
- Destination Development – Formal master plan on hold, working with EDB on tourism impact study
- Research
- Public Relations
- Sales and Marketing Tools

Current SCT Destination Data & Research Programs

Annual SCT Paid Research Subscriptions:

- **Economic Impact:** Dean Runyan: Sonoma County Travel Impacts
- **Visitation:** Longwoods International: Travel USA Visitor Study

Monthly/Weekly SCT Paid Research Subscriptions:

- **Data, dashboard and insights services:** Tourism Economics
- **Visitation:** UberMedia (device tracking)
- **Spending** (domestic and international visa credit card): VisaVue
- **Lodging:**
  - STR: hotel lodging data (weekly, monthly, forecast and pipeline reports)
  - AirDNA: short term rental data

Current SCT Destination Data & Research Programs

Ad hoc SCT Paid Research:

- Longwoods Advertising ROI (bi-annually)
- Destination Analysts Non-Visitor Study (as needed)
- Destination Analysts Wedding Market Study (potentially planned)
- Brand Research Study (last 2018; none currently planned)

SCT Marketing Data and Analytics:

- Google Analytics/Google Data Studio for www.sonomacounty.com
- Ad agency and paid media vendor marketing performance reports

SCT and EDB Collaboration:

- Sonoma County Annual Tourism Report

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Data, Dashboard and Insights Services: Tourism Economics

U.S. Travel Impact Summary
March 2021

U.S. TRAVEL ASSOCIATION

- Data Sources & Partners
- Impact Summary
- Travel Indicators
- Overseas Travel to the U.S.
- Economic Conditions
- Employment
- Travel Sentiment
- Covid-19 Vaccination
- Predictive DMO Indicators
- Predictive Industry Indicators
- Economic Forecast
- Domestic Travel Forecast
- International Travel Forecast
- Hotel Forecast

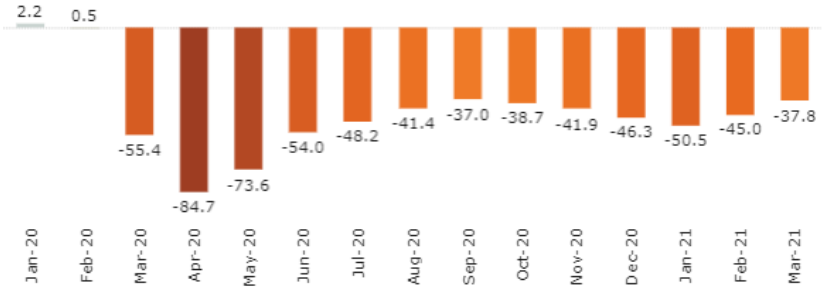
Destination (filter impacts entire page)
California

Cumulative Losses Since January 2020
California, through March 2021

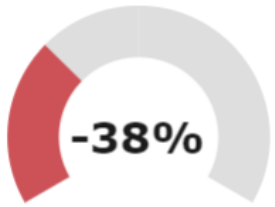
	California
Travel Spending (difference)	($85.5B)
Federal Taxes	($5,897M)
State Taxes	($2,655M)
Local Taxes	($1,457M)

Travel Spending (% change vs. 2019)
California

Travel Spending (% change vs. 2019)



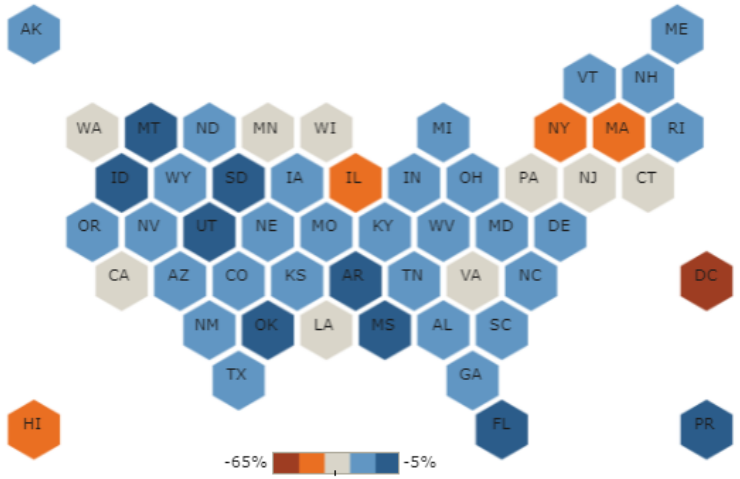
Travel Spending
California
March 2021, % change vs. 2019



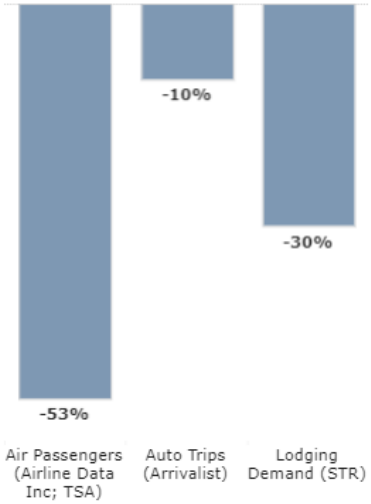
Travel Spending Losses
California

	Travel Spending	Travel Spending (difference)	Travel Spending % Chg vs. 2019
Jan-20	$12.1B	$0.3B	2.2%
Feb-20	$11.8B	$0.1B	0.5%
Mar-20	$5.9B	($7.4B)	-55.4%
Apr-20	$2.0B	($11.0B)	-84.7%
May-20	$3.6B	($9.9B)	-73.6%
Jun-20	$6.3B	($7.4B)	-54.0%
Jul-20	$7.3B	($6.8B)	-48.2%
Aug-20	$8.1B	($5.7B)	-41.4%
Sep-20	$8.1B	($4.7B)	-37.0%
Oct-20	$8.2B	($5.2B)	-38.7%
Nov-20	$7.2B	($5.2B)	-41.9%
Dec-20	$6.7B	($5.8B)	-46.3%
Jan-21	$6.1B	($6.3B)	-50.5%
Feb-21	$6.5B	($5.3B)	-45.0%
Mar-21	$8.3B	($5.0B)	-37.8%

U.S. Travel Spending by State
March 2021, % change vs. 2019



Travel & Tourism Recovery
California
March 2021, % change vs. 2019



Source: Tourism Economics (travel spending)

SYMPHONY TOURISM ECONOMICS

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Data, Dashboard and Insights Services: Tourism Economics

Sonoma County | Travel Performance Report

Sonoma County Tourism Board of Directors, April 2021

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April 2021

Hotel Performance

Sonoma County, April 2021 and % change YOY (source: STR)

OCC	ADR	RevPAR	Supply	Room Demand	Room Revenue
66.0%	$168.66	$111.34	219.4K	144.9K	$24.4M
▲ 131.3%	▲ 74.7%	▲ 304.1%	▲ 29.0%	▲ 198.3%	▲ 421.2%

Short-term Rental Performance

Sonoma County, April 2021 and % change YOY (source: AirDNA)

OCC	ADR	RevPAR	Supply	Room Demand	Room Revenue
72.4%	$483.79	$350.48	67.5K	48.9K	$23.6M
▲ 42.5%	▲ 37.2%	▲ 95.5%	▲ 18.7%	▲ 69.2%	▲ 132.0%

Insights

April 2021 Key takeaways

1. Hotel demand in April amounted to 145K nights, now 3% below 2019 levels, marking the closest room nights have come to 2019 levels since pandemic effects began.
2. A pickup in ADR (+15.2% MOM), combined with additional demand (up 12.7% MOM), afforded room revenue to grow significantly in April to $24.4M, now equal to 2019 levels.
3. Organic web sessions in April dropped to 244K sessions, down 8.6% MOM and 37% behind 2019 session levels. Web sessions have remained distant from 2019 levels throughout 2021.
4. Total flight passengers for the month were 25,915, marking a significant increase from the prior month as flights nearly doubled over March, and were down 23.9% YOY.
5. Leisure and hospitality employment picked up slightly in April at +5% MOM, but remains 30% below 2019 levels. Total nonfarm jobs, however, were nearly unmoved at 188K jobs, only 1% above last month.

Room Revenue and Contribution

Total Room Revenue and % share, Sonoma County

Source: STR; and AIRDNA

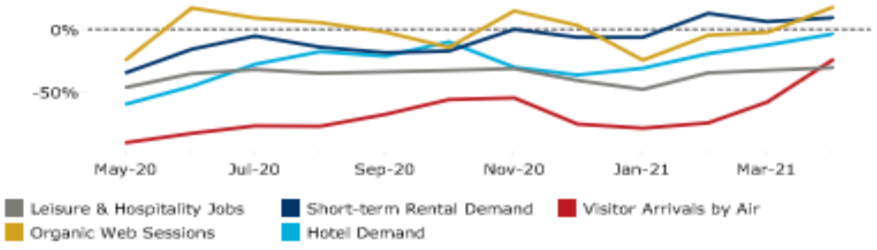
Hotel Performance Trends

Sonoma County

Source: STR

Recovery Indicators

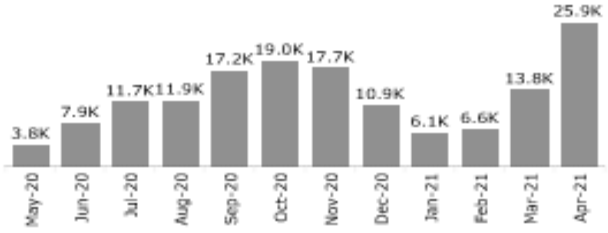
% change relative to same month in 2019



Source: BLS, Google Analytics, AIRDNA, STR, and OAG

Sonoma County Airport Passengers

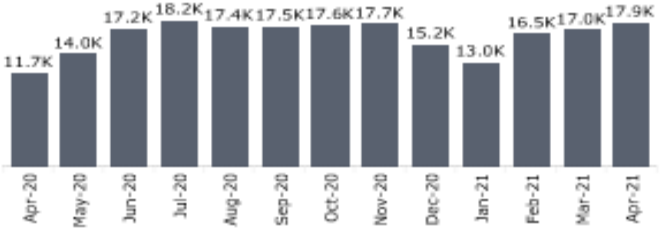
STS Airport, last 12 months



Source: STS

Leisure & Hospitality Jobs

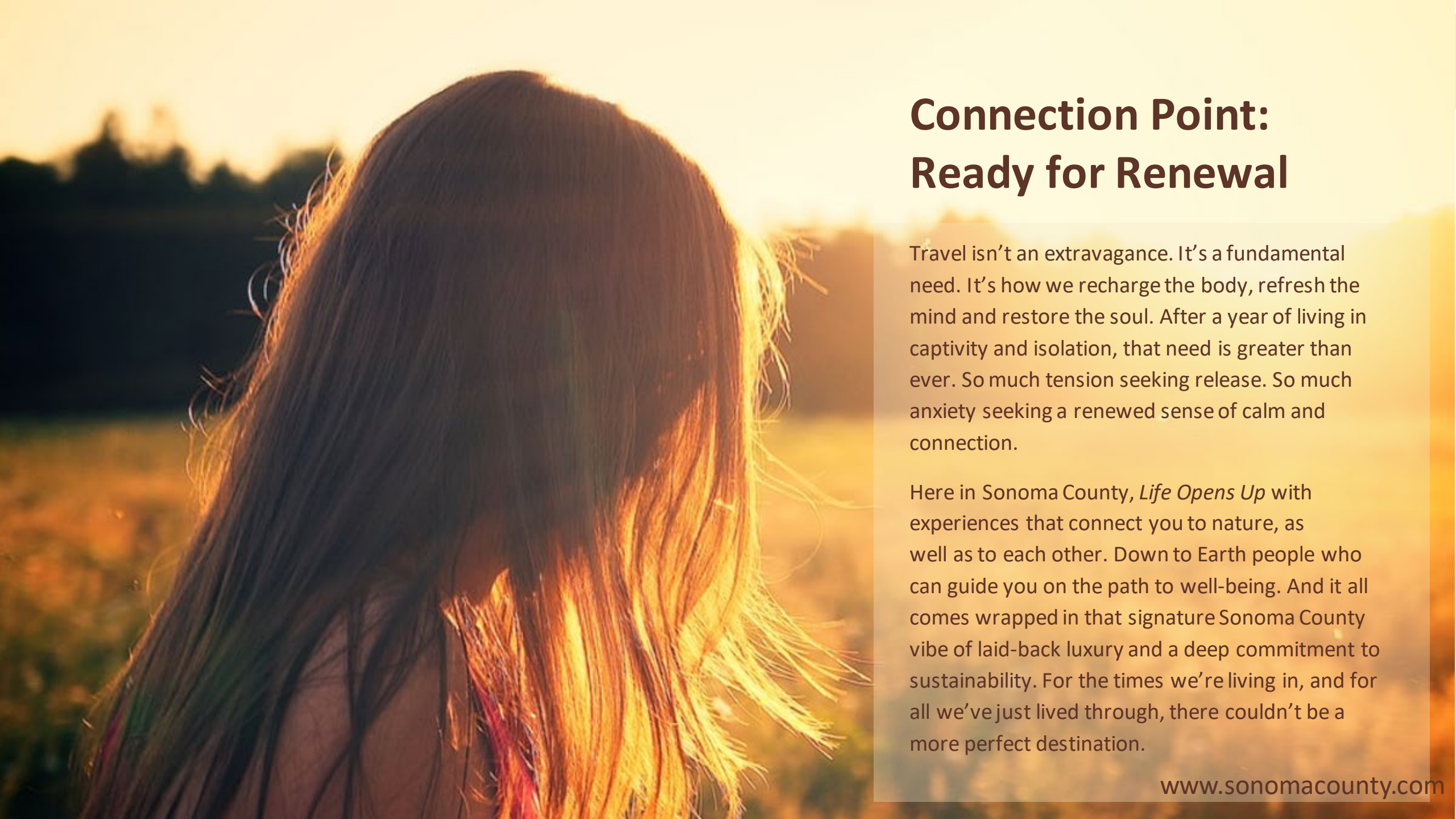
Sonoma County, last 12 months



Source: BLS

Note: Commentary reflects the month of publishing and may differ from data as later revisions are made.

SYMPHONY TOURISM ECONOMICS



Connection Point: Ready for Renewal

Travel isn't an extravagance. It's a fundamental need. It's how we recharge the body, refresh the mind and restore the soul. After a year of living in captivity and isolation, that need is greater than ever. So much tension seeking release. So much anxiety seeking a renewed sense of calm and connection.

Here in Sonoma County, *Life Opens Up* with experiences that connect you to nature, as well as to each other. Down to Earth people who can guide you on the path to well-being. And it all comes wrapped in that signature Sonoma County vibe of laid-back luxury and a deep commitment to sustainability. For the times we're living in, and for all we've just lived through, there couldn't be a more perfect destination.

www.sonomacounty.com

Audience Targeting

Personas and Interests

- Personas: Sophisticates, Sippers and Spontaneous Explorers
- Interests: Wellness, Sustainability

Moments & Mindset

- Active Travel Intenders
- Remarketing to those showing interest in Sonoma County

Geography

- Bay Area
- Drive Market < 300 miles
- In-State Flight
- Regional Flight Markets

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Geography, Timing and Mindsets

AD COPY

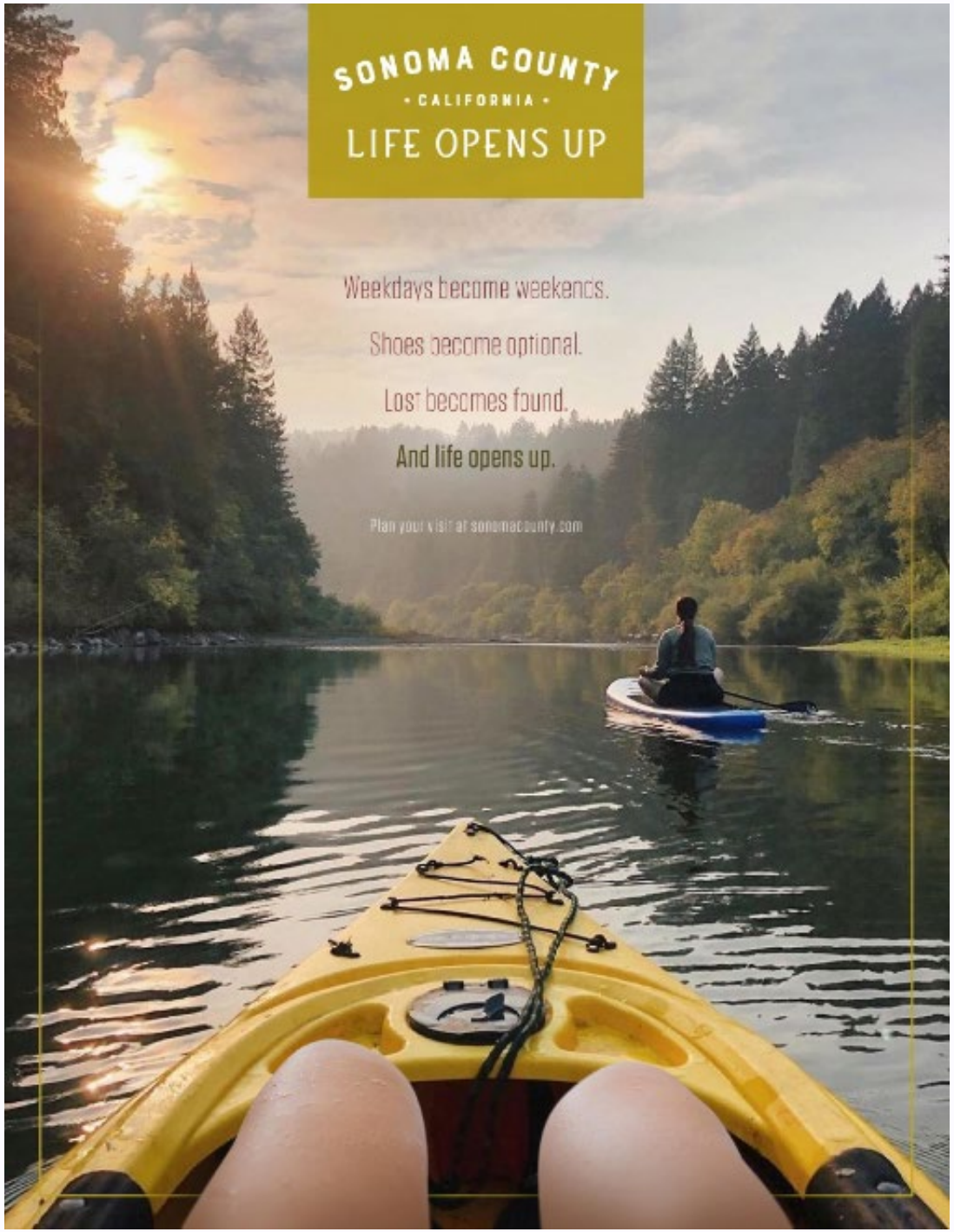
Weekdays become weekends.

Shoes become optional.

Lost becomes found.

And life opens up.

Plan your visit at sonomacounty.com



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Local favorites grace the table.
The senses reawaken.
Stories flow like wine.
And life opens up.
BOOK NOW >

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LIFE OPENS UP
Adventure beckons.
Courage is summoned.
Three...two...one...
And life opens up.
BOOK NOW >

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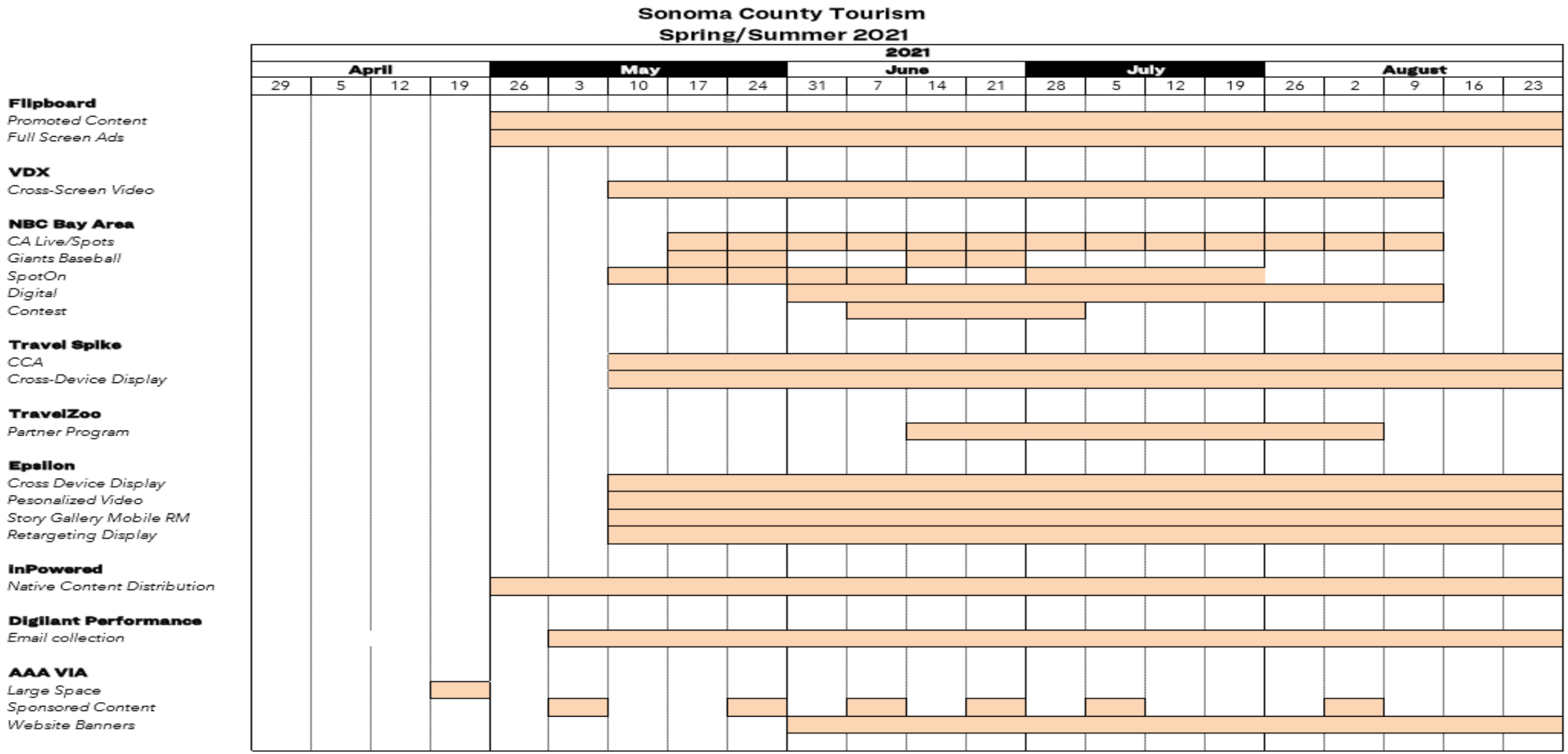
Recovery Media Plan



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Public Relations Objectives

- Drive awareness and engagement to the **restorative elements** of Sonoma County's brand experience.
- Secure and maintain Sonoma County's unique leadership position in **responsible travel, stewardship and sustainability**.
- Facilitate consistent, relevant and positive media attention among a focused list of **key targets**.
- Engage **community partners** and stakeholders in earned media and education programs.
- Support integrated efforts to **drive conversion and booking** during key timeframes.
- Mitigate media coverage and misinformation about **wildfire season**.

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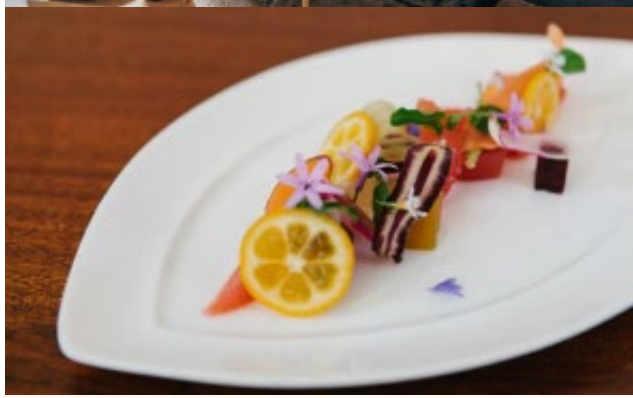
Key Storylines and Focus Areas

- **Restorative experiences**: well-being opportunities, rejuvenating road trips
- **Luminaries**: Characters of Sonoma County, expressive artists, small businesses, diverse, equitable and inclusive community
- **Passive outdoor activities**: yoga in the vineyards, coastal excursions, forest bathing, etc.
- **Approachable culture**: opportunities for personal growth and new experiences (wine, food, art, history, inclusivity)
- **Sustainability** and destination leadership around travel stewardship
- **Sensory immersion**: slow food and wine, slow travel, exceptional agricultural community
- **Marking milestones**: celebration-starved travelers are seeking ways to splurge on missed trips and big moments, seeking guidance on 'doing it right'



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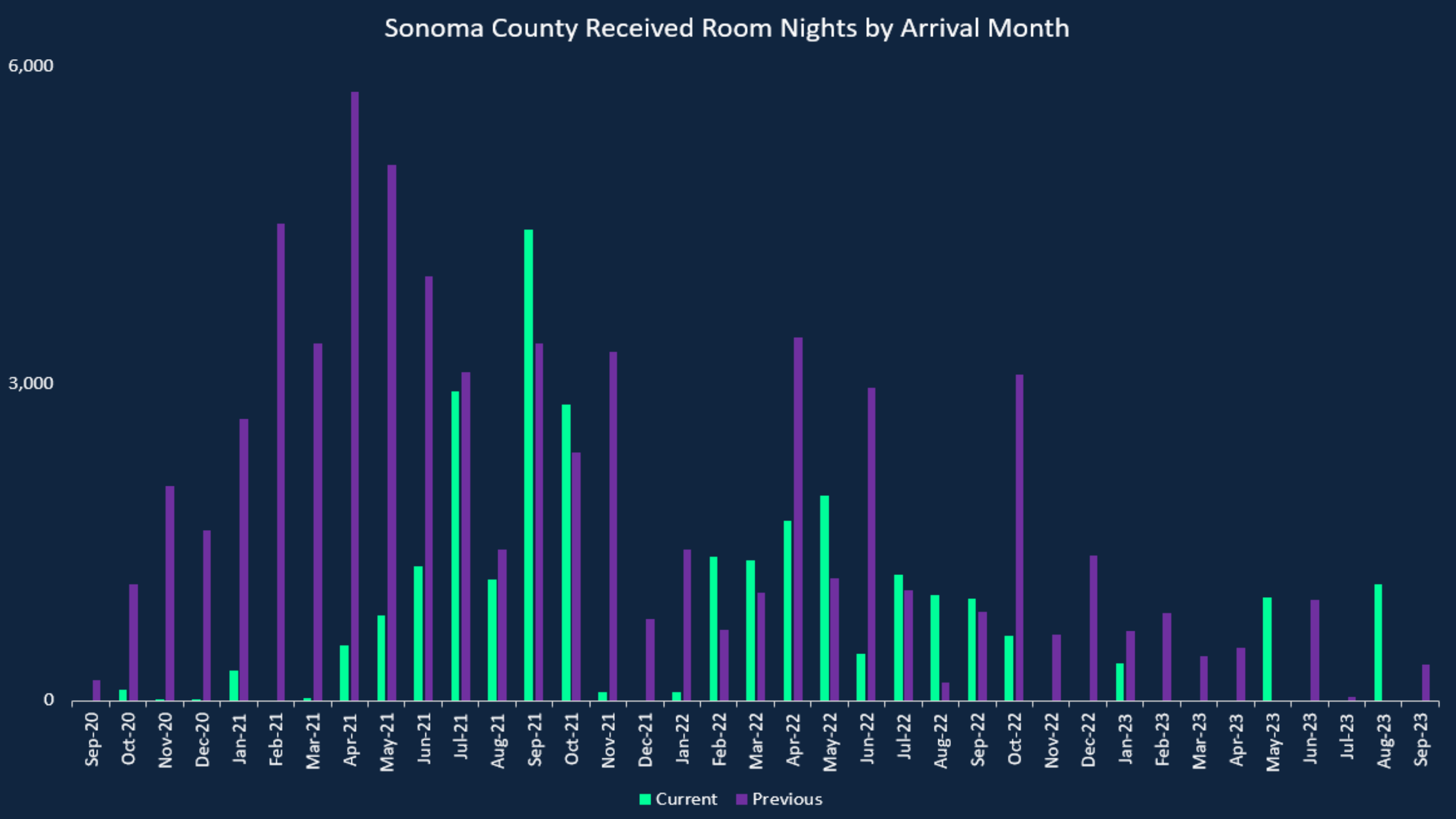
Sales and Marketing Tools

Sonoma County Tasting Pass

Digital Inspiration Guide

Map/Visitor Information


Sonoma County Received Room Nights by Arrival Month
6,000
3,000
0
Sep-20
Oct-20
Nov-20
Dec-20
Jan-21
Feb-21
Mar-21
Apr-21
May-21
Jun-21
Jul-21
Aug-21
Sep-21
Oct-21
Nov-21
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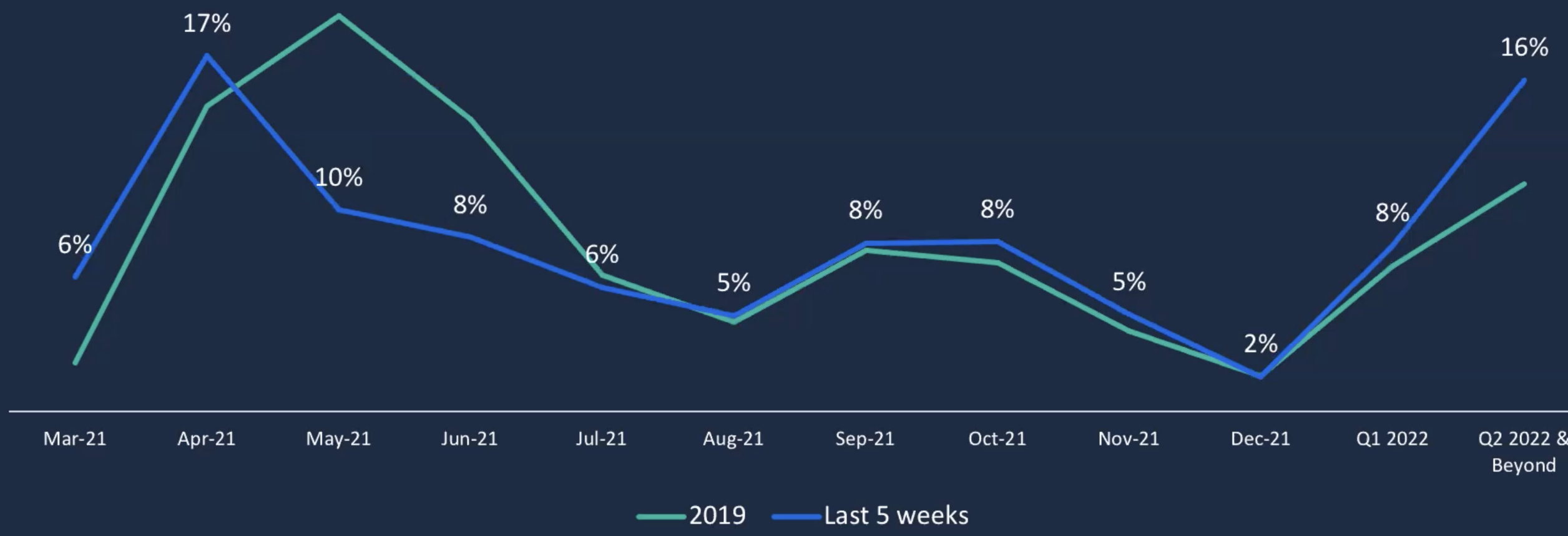
Oct-22
Nov-22
Dec-22
Jan-23
Feb-23
Mar-23
Apr-23
May-23
Jun-23
Jul-23
Aug-23
Sep-23
Current
Previous

When are planners sourcing for?



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GBD Recovery Outline

- Phase I: March – August
  - Virtual Tradeshow Participation
  - Targeted Ad Placement
  - PCMA Convene April Edition, MPI Leaderboard & CVB Destination Advertorial, Northstar Travel Group Destination Guide & Social Media Marketing, Cvent 4 Diamond Listing & Destination Ads
  - Meetings Newsletters
  - Meetings & Weddings Website Redesign/Refresh
  - Meetings Video
- Phase II: September – March 2022
  - Tradeshow Participation
  - Client Events & FAM's
  - Sales Missions
  - Digital Marketing Campaign (California focus)
  - Email Marketing Campaign
- Phase III: April 2022 – Dec. 2022
  - All prior activities
  - Digital and Email marketing campaigns to extend to all direct flight markets
  - Wedding Video

Wedding Guide

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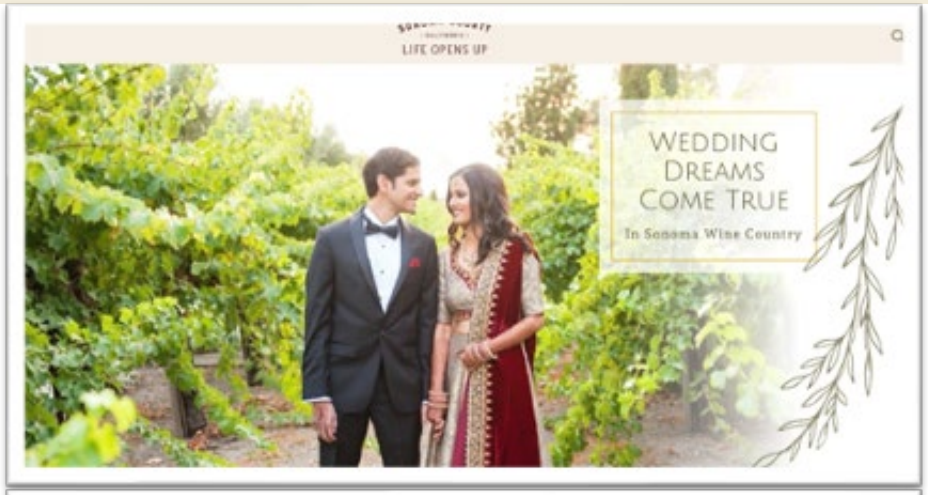
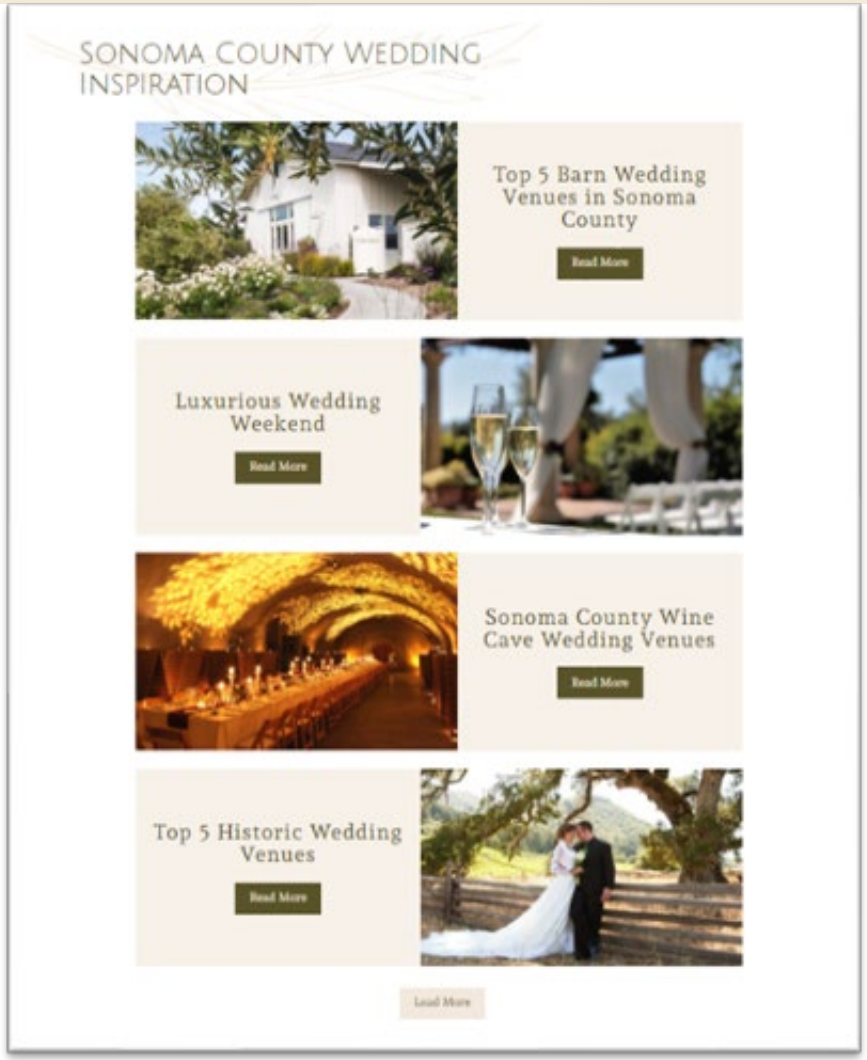
SCT Wedding Website





www.sonomacounty.com/weddings

Key Takeaways

- March well above February volumes
- Conversion continues to run strong
- Larger meetings than usual
- Warm markets continue strength but signs of life in urban markets

- Still shift to 2H and 2022 but a bit more normal
- Demand 30 points better for this fall than this spring
- Corporate finally starting to come back

- Rates increased significantly in March – almost even with 2019 figures
- Independents and Luxury showing most rate strength in March

- Planner sentiment improving
- Planners are really counting on help in producing hybrid events

Community Engagement

- **Manage Responsible Travel Initiative**
  - Sustainability efforts
  - Align with organizations throughout Sonoma County dedicated to sustainability and resource management
- **Engage Key Stakeholders**
  - Convey the value of tourism
  - Coordinate National Travel and Tourism Week activities/messaging
- **Coordinate with the Sonoma County Hospitality Association**
  - Industry education

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Community Engagement

- **Manage Partner Communications**
  - Tourism Information, News and Resources
  - Tourism Performance and Insights
  - Partner Alerts
- **Coordinate Tourism Cares**
  - Continue to participate in ways to give back to Sonoma County
- **Initiate NEW Accredited Hospitality Professional program**
  - Evolution from the Certified Tourism Ambassador program
  - Reimagine curriculum and destination education

Operations

- Labor
  - Reduced staff in 2020 from 22 FTE to 15 FTE
  - Build back staff in 2021 to match need
- Administrative Expenses
  - Reduced office rental costs
  - Joined office space with the Sonoma County Vintners
- Capital Expenditures – computer replacements as scheduled
- Reserves – retain 3-month reserve level

Operations

- Commitment to Diversity, Equity and Inclusion
  - Inclusion added as organizational value
- Continued dedication to responsible/sustainable tourism
- New community engagement program – Accredited Hospitality Professional
- Ongoing commitment to timely communications, work within communities (Tourism Cares)

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FY21-22 Budget Comparison - Revenue

Contracts						
			Revised	**Original**	**Variance**	**FY20-21 Actual**
	5100	County Contract - BIA	4,672,420	3,963,694	708,726	3,532,555
	5102	County Contract – TOT	2,098,985	1,902,573	196,412	1,812,849
TOTAL CONTRACTS			6,771,405	5,866,266	905,139	5,345,404
	Other Income		33,382	23,382	10,000	
TOTAL REVENUE			**6,804,786**	**5,889,648**	**915,139**	**5,384,312**

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FY21-22 Budget Comparison - Expenses

Program	Revised	Original	Variance	FY20-21 Actual
Advertising	1,596,300	1,235,400	360,900	1,485,529
Client Events/FAMS	201,680	152,840	48,840	173,556
Travel/Tradeshows	217,526	194,026	23,500	21,136
Digital Engagement	591,999	505,451	86,548	512,207
Organization Tools	111,050	111,050	0	101,495
Research	129,360	82,300	47,060	143,000
Event and Organization Sponsorships	223,050	135,800	87,350	26,424
Memberships	42,838	37,263	5,575	38,676
Contract Services	497,450	408,850	88,600	171,917
Professional Dvlpt.	158,600	140,500	18,100	28,159
Destination Programming	144,638	262,498	-117,860	121,173
Payroll & Human Resources	2,591,947	2,315,045	276,902	1,981,523

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FY21-22 Budget Comparison - Expenses

Program	Revised	Original	Variance	FY20-21 Actual
Technology	139,794	139,794	0	143,522
Office Supplies and Equipment	69,966	70,716	-750	82,487
Fees and Licenses	192,022	192,022	0	144,364
Facilities Expense	191,542	191,542	0	180,302
TOTAL EXPENSES	**7,099,762**	**6,175,097**	**924,665**	**5,355,468**
NET OPERATING INCOME	**-294,975**	**-285,449**	**-9,526**	**28,844**

Breakdown by Department

	Revised	Original	FY20-21
Administration	19.59%	20.96%	20.99%
Marketing/PR	49.75%	50.39%	55.01%
Group Business Development	21.54%	21.43%	14.55%
Community Engagement	9.12%	7.22%	9.45%
TOTAL	100.00%	100.00%	100.00%

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Organizational KPIs (FY21-22)

This will be a rebuilding year following the year-long pandemic shut-down. The organization will continuously monitor reopening for both leisure and business travel.

1. Reenergize Sonoma County tourism's industry through a robust program that drives business, elevates the industry through education and creates destination champions.
2. Create and manage group (business and leisure) leads ensuring partners are able to book business surpassing pre-pandemic levels.
3. Integrate the Leave No Trace partnership and continue to communicate a commitment to destination stewardship, positioning Sonoma County as a leader in sustainable travel.
4. Secure a funding model that will help ensure long-term financial stability for the organization.
5. Create and initiate a business development model that seeks to find new markets, heightens current partner opportunities and introduces Sonoma County to more diverse communities.
6. Complete foundational components (organizational statement, team inclusion action plan, external communications policies) of a DEI program that mandate the organization's commitment to both internal and external diversity, equity and inclusion.
7. Identify and staff the organizational structure to meet the needs of SCT for the time period covered in the plan.
8. Ensure crisis plan is updated, communicated and executed as planned (if needed).

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Organizational KPIs (FY22-23)

We anticipate full recovery during this year so will return to striving to achieve an aspirational, metrics-based set of Key Performance Indicators (KPIs).

1. Achieve a 5% year-over-year increase in revenue to Sonoma County's lodging properties (per BIA/TOT collections and Dean Runyan economic impact survey).
2. Increase length of stay from 2.8 nights (2020) to 3.1 nights (or longer), focusing on winter and spring, helping to flatten weekend vs. weekday travel (per Longwoods International Visitation Study).
3. Increase group leads to partners by 10% year-over-year.
4. Generate a marketing program Return-on-Investment that exceeds pre-pandemic levels (per Longwoods ROI Study).
5. Ensure the organization's DEI imperative has a high level of inclusion and satisfaction within the programming (internal) and diverse audiences are being included at increasingly higher levels in sales and marketing pieces (external).
6. Bolster partner satisfaction in the organization's efforts with results shown through an annual partner survey.
7. Ensure the process for long-term funding secured in FY21-22 is operational and funds are distributed to the organization as designated.

Responsible Travel – Key Summer Message

- Partnership with Sonoma County Regional Parks/Leave No Trace
- Messaging on SonomaCounty.com
- Customization of the Leave No Trace 7 Principles
- Radio Campaign – Lead up to holiday weekends (English and Spanish-speaking stations)

- Continue Travel Kindly Pledge

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Significant Red Flags to Watch

- Workforce
  - Reduction in operations/capacity/visitor experiences
- Confusion around mask requirements at specific businesses
- High gas prices
- Accelerated recovery
  - Pent-up demand, novice travelers
- Drought
  - Working with the Water Agency/Chambers to align messaging, convey to travelers
- Potential fire season
  - Updated crisis plan, continue to work with County agencies, partners

Questions?

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