



EPSILON®

# THE FUTURE OF TOURISM MARKETING

Drive **performance-based outcomes** that impact your destination

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# TOMMY MARTINEZ

**DIRECTOR – TRAVEL & TOURISM**



# TRANSFORM EVERYDAY CUSTOMER EXPERIENCES INTO MEANINGFUL HUMAN EXPERIENCES THAT MATTER

- Industry-leading identity, data science and technology
- Software with service
- Increased power with Publicis Groupe
- 50+ years of proven results



# SERVING CLIENTS ACROSS INDUSTRIES

## Auto



## Retail



## Financial Services



## Insurance



## Technology



## Telecom



## CPG



## Healthcare



## Travel



## B2B



## Media & Ent.



## Restaurants



# FORTUNE 1000 CLIENT BASE



# 1ST-PARTY VS 3RD-PARTY COOKIES

# WHAT'S HAPPENING?

In the name of consumer privacy, web browsers are increasingly restricting the use of third-party cookies by the ad industry.

## September 2017

Apple released ITP 1.0 on Safari, eliminating third-party cookies to prevent cross-site tracking.



## May 2019

Google announced an update to Chrome that gave users more insight into, and control over, how cookies are tracking them online.

## January 2020

Google announced a plan to eliminate third-party cookies on Chrome by 2022.

## September 2018, February 2019, April 2019, September 2019

Apple released versions 2.0, 2.1, 2.2 and 2.3 of ITP, further eliminating the ability to cross-site track via third-party cookies.

## September 2019

Mozilla followed Apple by blocking third-party cookies on Firefox.



# WITHOUT THEM, HOW WILL MARKETERS BE AFFECTED?

About 80% of marketers depend on 3PCs,\* which are used for far more than serving ads. When they're gone, it will disrupt key components of the entire digital advertising ecosystem.

## REACH

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Without 3PCs, marketers will need to find a new way to reach their customers and prospects online.



## PERSONALIZATION

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Behavioral and browsing data will be limited, making it hard for marketers who depend on 3PCs to personalize ads.



## CAMPAIGN MANAGEMENT

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Basic capabilities like A/B testing and frequency capping will be challenging for marketers who depend on 3PCs.



## PERFORMANCE MEASUREMENT

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Analytics and attribution based on 3PCs will be significantly challenged.

# THERE'S A PATH FORWARD.

If you want to keep **personalizing** and **driving performance across the open web**, Epsilon has a solution.



## THE APPROACH

**A programmatic solution with a people-based identity that links publishers' and advertisers' first-party data.**

## THE BENEFIT

People-based identity is highly accurate and stable, as it's anchored in deterministic data, not 3PCs. Combining this with publishers' first-party data will allow you to personalize and drive performance across the open web, independent of 3PCs.



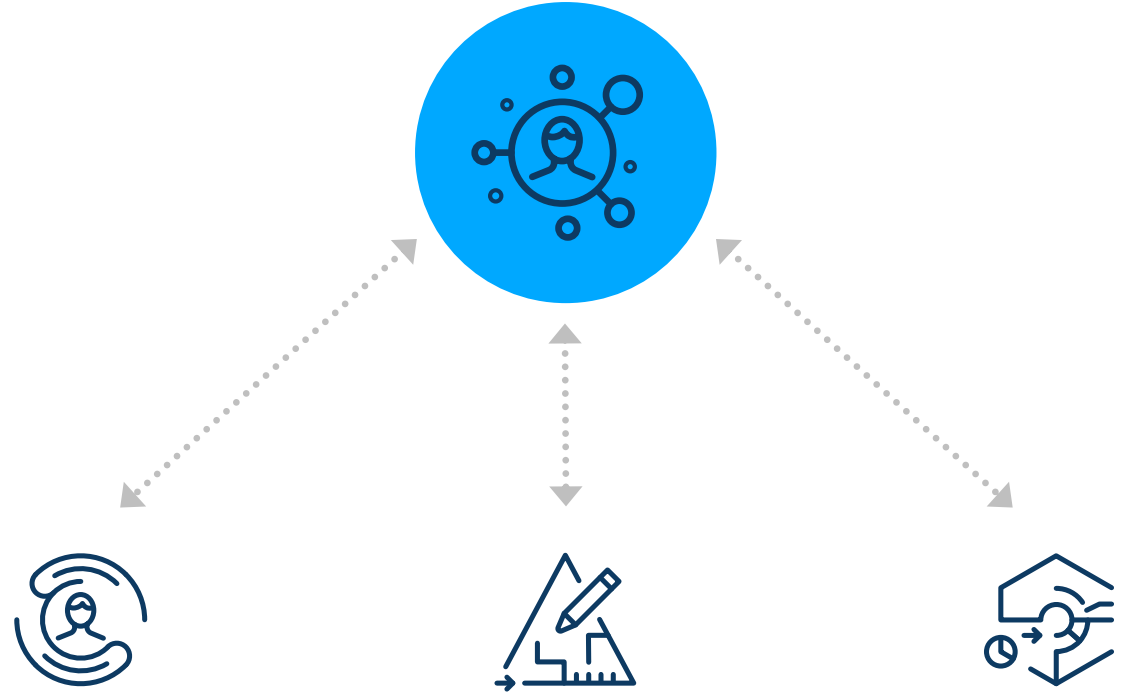


**IDENTIFY &  
REACH HIGH-  
VALUE VISITORS**

# WHY IS IDENTITY SO IMPORTANT?

## ACCURATE IDENTITY

is the foundation of any successful marketing program



### INDIVIDUALIZED PROFILES

A comprehensive understanding of every consumer

### DECISIONING & DELIVERY

1:1 personalized messaging at the individual level

### MEASUREMENT & INSIGHTS

Transparency into every dollar spent to drive ROI

# IDENTITY

## THE NEW CURRENCY IN DIGITAL MARKETING

Device ID  
4562879



Jane Johnson  
555-888-9999

User ID: 67875  
jsmith@mail.com



J Smith  
johnson65@wahoo.com



Social ID  
jmith77



Cookie ID  
fjf87sjkf456



Jane Smith  
456 Elm Street



J Johnson  
123 Main  
Street



Customer ID  
102938



Jane Johnson-Smith  
jane.smith@work.com  
888-777-3333

# BUT COOKIES ARE JUST ONE PART OF ACCURATE IDENTITY RESOLUTION

**151.9 M**



cookies

**22.9 M**



individuals

## FIRST STEP TO REAL, ACCURATE MEASUREMENT:

Individual IDs allow you to identify the best people

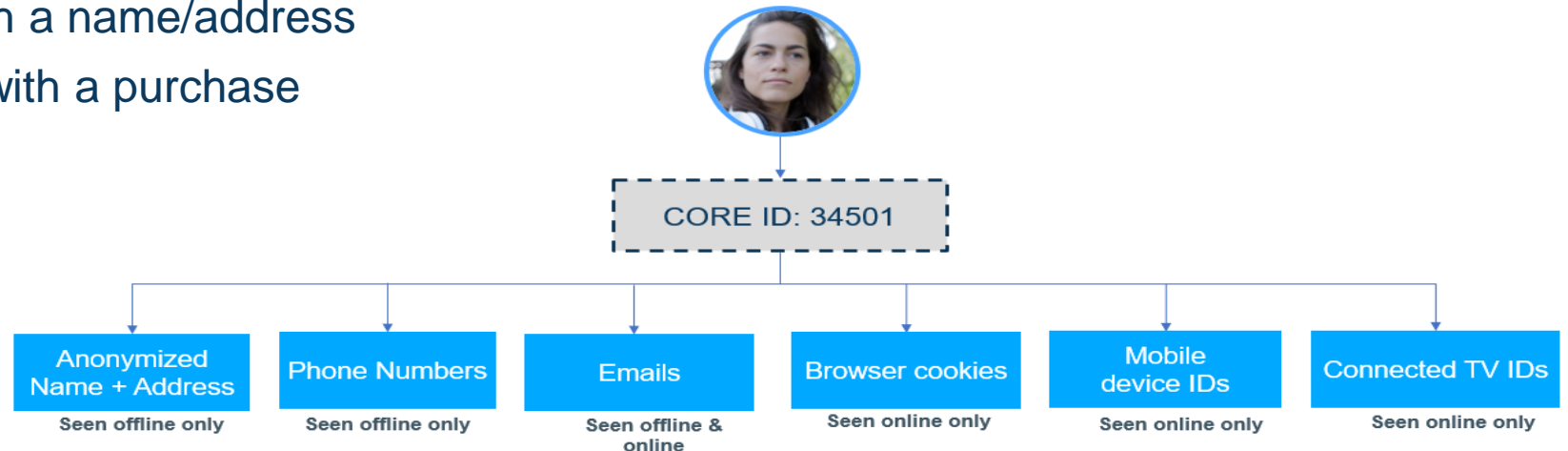
Individual IDs accurately measure individual behavior

Once you know a consumer, you can dedupe

Individual IDs enable tracking in app, mobile, iOS

# CORE ID: OUR APPROACH

- Each identified person is assigned a unique & anonymous ID, called CORE ID
- Founded on our proprietary name & address data
  - Online/offline purchases from our partners and clients are matched to this foundation
  - We augment this foundation by using login/registration data and other supplemental data signals
- This approach allows us to connect each CORE ID to a person's offline & online identity
  - Each CORE ID associated with a name/address
  - Each CORE ID is associated with a purchase



# CREATING A SINGLE VIEW OF THE TRAVELER ACROSS EVERY INTERACTION POINT



# INTELLIGENT DATA

- 1** Deterministically match each consumer to an online profile
- 2** Verify profile & populate with offline data
- 3** Add desktop data
- 4** Add mobile data
- 5** Destination custom audiences
  - Visitor spend
  - Travel intent
  - Advertiser first-party data

# FUELS 200M+ INDIVIDUAL PROFILES



A man and a young child are standing in a dense forest, looking upwards. The man is wearing a dark cap and a dark jacket, and the child is wearing a grey hoodie. The background is filled with tall trees and green foliage. The text "CREATE DESTINATION DEMAND" is overlaid on the left side of the image in large, white, bold letters.

**CREATE  
DESTINATION  
DEMAND**



# A FRAGMENTED APPROACH VS. REACHING YOUR VISITORS AS INDIVIDUALS

UNIVERSAL ID 47B122

**DEMOGRAPHIC**

- Male, 35
- Married, 2 kids
- Income: \$150K
- New York, NY



UNIVERSAL ID 12K744

**DEMOGRAPHIC**

- Male, 35
- Married, 2 kids
- Income: \$150K
- New York, NY



# A FRAGMENTED APPROACH VS. REACHING YOUR VISITORS AS INDIVIDUALS

UNIVERSAL ID 47B122

## DEMOGRAPHIC

- Male, 35
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- New York, NY

## BROWSING HISTORY

- Airline> Homepage

## PURCHASE ACTIVITY

- Airline> New York to Florida

## DOMINANT CATEGORIES

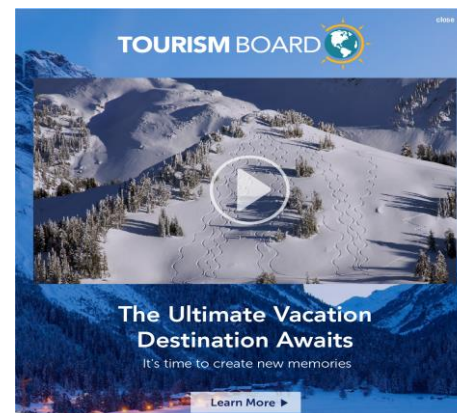
- First Class Flights
- My Trip

## INDIVIDUAL ATTRIBUTES

- Full Price Shopper
- Luxury Style
- Golfer
- **Beach Vacationer**



1:1 Personalization



UNIVERSAL ID 12K744

## DEMOGRAPHIC

- Male, 35
- Married, 2 kids
- Income: \$150K
- New York, NY

## BROWSING HISTORY

- Airline>Loyalty Enrollment

## PURCHASE ACTIVITY

- Airline> New York to South Carolina
- Booking for multiple people

## DOMINANT CATEGORIES

- Loyalty Site
- Special Offers

## INDIVIDUAL ATTRIBUTES

- Casual Style
- Outdoor Enthusiast
- Deal Hunter
- Traveler
- **Ski Enthusiast**



**MEASURE AND  
PROVE YOUR  
IMPACT ON THE  
COMMUNITY**

# CORE TRANSACTION

One of the largest individual-level transactional data sets

CORE Transact enables marketers to **target individuals** and **measure sales performance** not captured at the point-of-sale with Epsilon's exclusive 3<sup>rd</sup> party credit and debit card transactional data.

# CORE TRANSACT DATA: WHAT'S INCLUDED?

## Track and measure transaction behavior during or after a campaign at the merchant level

Transactional data includes both debit and credit card transactions.



Captures

**More than \$2.8 Trillion**  
in transactions annually



Includes

**1.5M merchants**  
spanning across  
multiple industries



Apparel  
& Accessories



Auto



Education



Entertainment  
& Recreation



Financial  
Services



General  
Retail Stores



Grocery & Food



Health  
& Personal Care



Hobbies



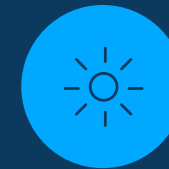
Professional  
Services



Restaurants



Travel



Utilities

# NET ECONOMIC IMPACT TARGETING & MEASUREMENT



Define the right audiences and feeder markets and message across all their devices



Match individual-level non-cash transactions made in a geo-defined area to messaged digital media



Measure the economic impact of your campaign with previously unavailable insights

# CAMPAIGN METRICS

**\$18.9M**

total messaged revenue

**\$239K**

investment

**\$79:1**

ROAS

**9.2M**

unique individuals reached

**27K**

total visitors

**0.29%**

messaged traveler rate

**150K**

total transactions

**5.6**

average purchases  
per visitor

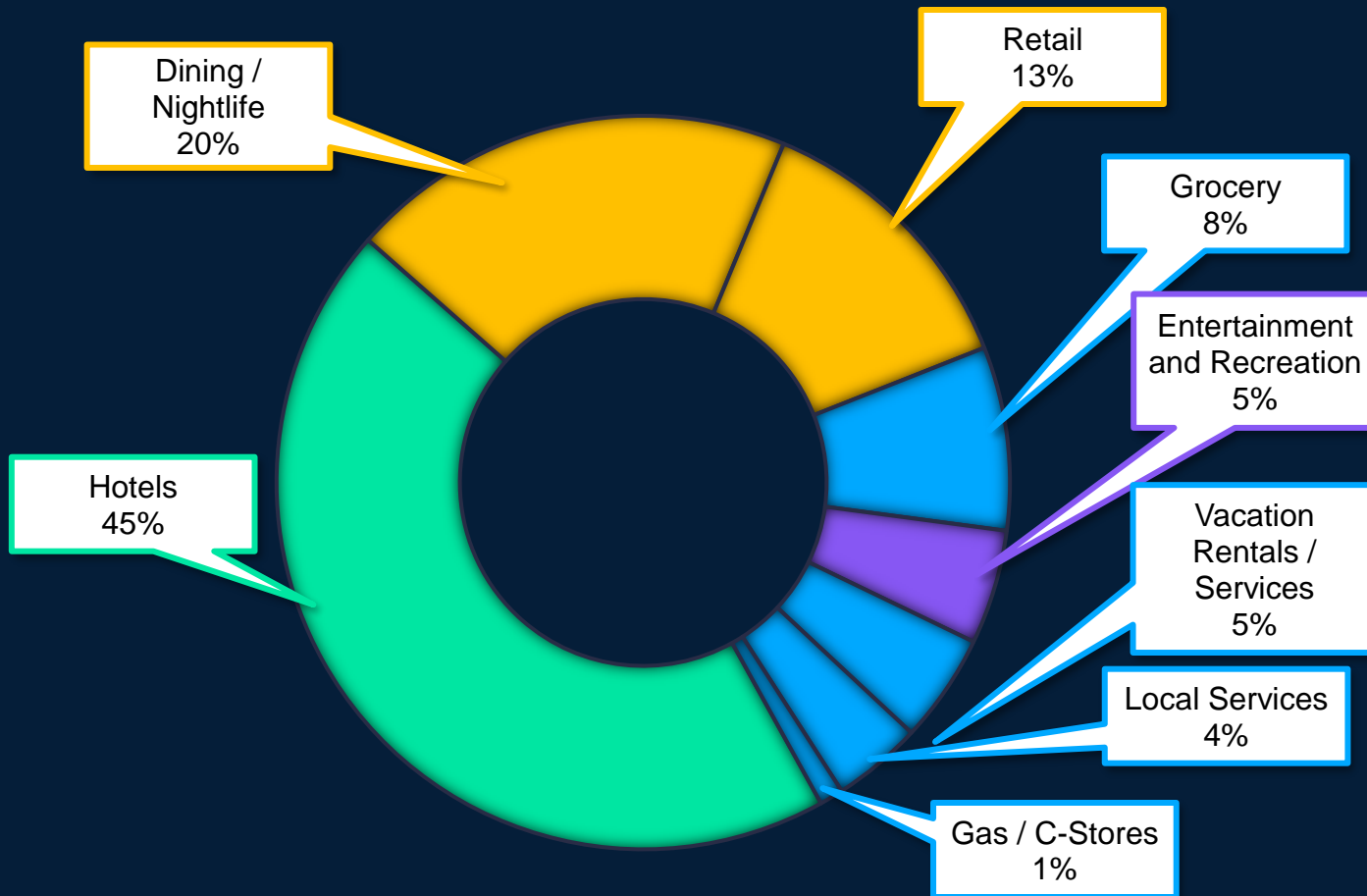
**\$706**

average messaged yield  
per visitor

Note: NEI measures on average about 50–60% of non-cash transactions

Measurement Window: October 1, 2019–April 5, 2020

# REVENUE BY CATEGORY



**45% of measured revenue** came from the **Hotel** category

- Hotel ROAS: **\$33:1**

**33% of measured revenue** came from **Retail and Dining / Nightlife** spending

- Retail ROAS: **\$9:1**
- Dining / Nightlife ROAS: **\$15:1**

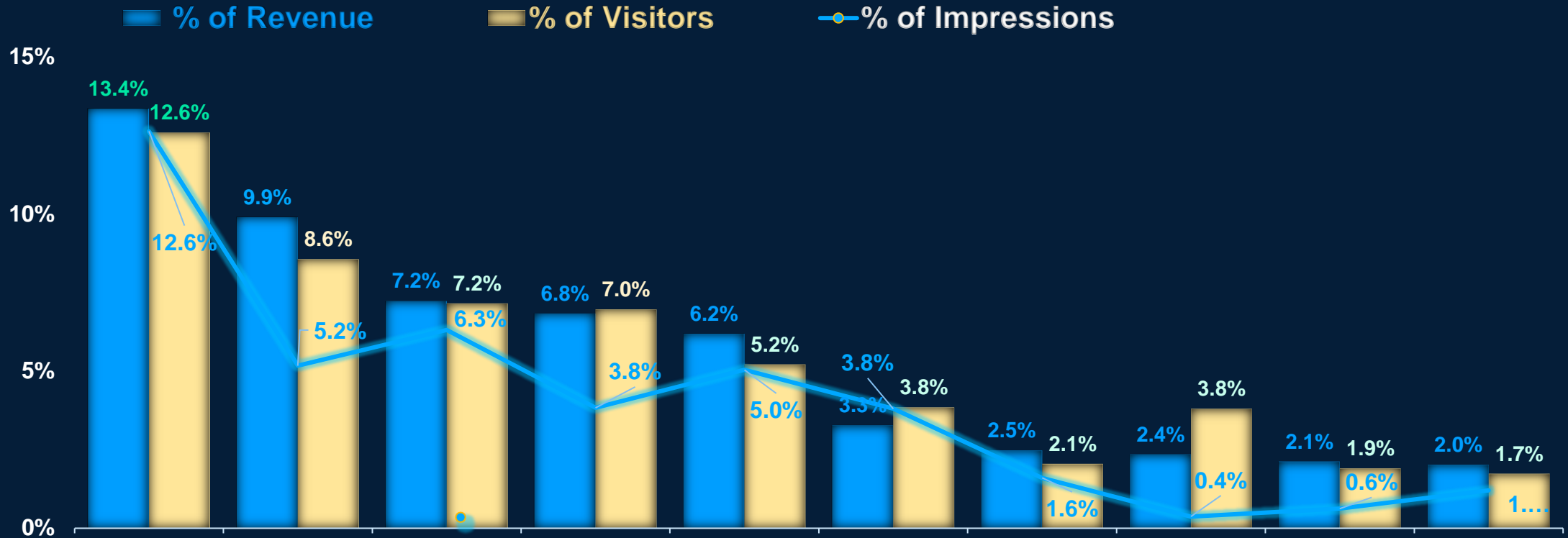
**5% of measured revenue** came from **Entertainment and Recreation** spending

- Ent & Rec ROAS: **\$4:1**

Note: \$18.9M total revenue; 94% of total revenue matched to categories above  
Measurement Window: October 1, 2019–April 5, 2020



# REVENUE BY RESIDENTIAL DMA



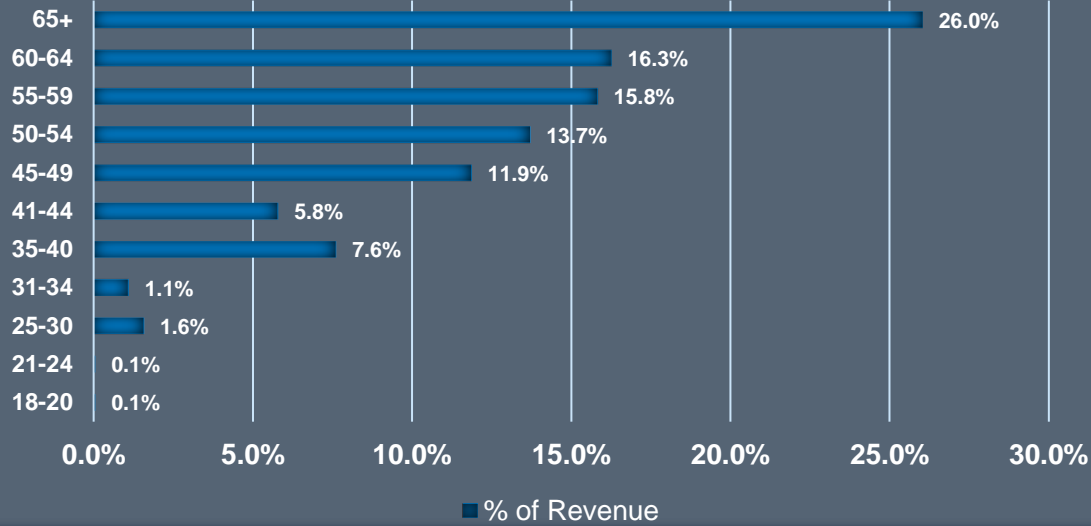
	New York	Philadelphia	Washington DC	Boston	Chicago	Atlanta	Detroit	Miami - Ft. Laude	Baltimore	Charlotte
ROAS Contribution	\$10.54	\$7.81	\$5.71	\$5.39	\$4.89	\$2.58	\$1.95	\$1.86	\$1.67	\$1.59
Market ROAS	\$83.45	\$151.03	\$90.46	\$140.79	\$96.97	\$67.94	\$121.88	\$501.45	\$269.96	\$132.90
Average Yield Per Visitor	\$749.05	\$816.16	\$714.31	\$693.21	\$839.28	\$601.55	\$851.13	\$436.86	\$788.20	\$824.82

- **13.4%** of measured revenue generated in Destination X came from the **New York** DMA; additionally, that measured revenue was driven by **12.6%** of visitors
- **Detroit, Baltimore** and **Charlotte** 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

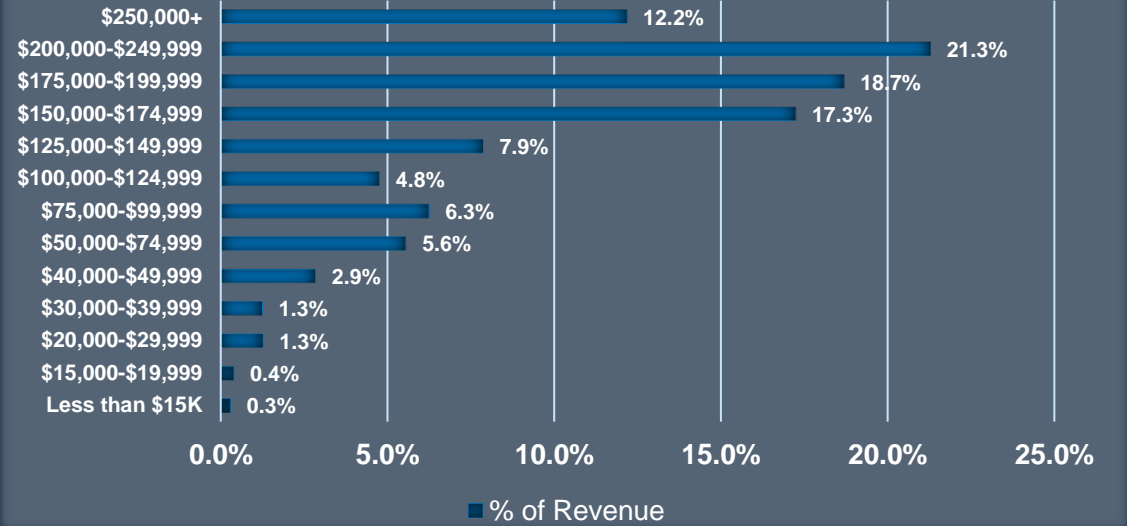
Note: Only top 10 feeder markets that were delivered impressions shown here; total of all 10 may not equate to 100% or total ROAS amount, some DMAs may represent re-targeting from delivery in targeted DMA

# VISITOR DEMOGRAPHICS

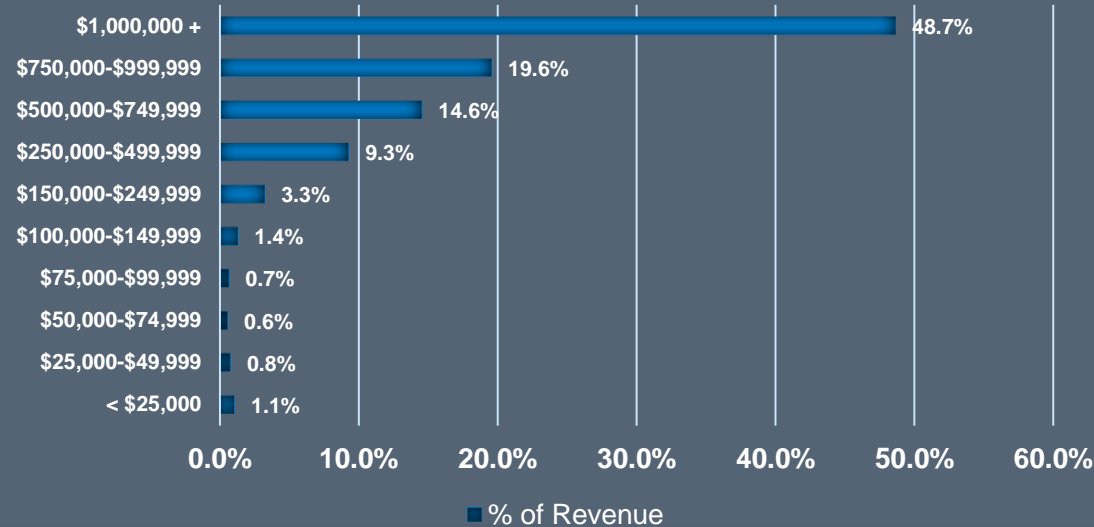
## Revenue by Age Bracket



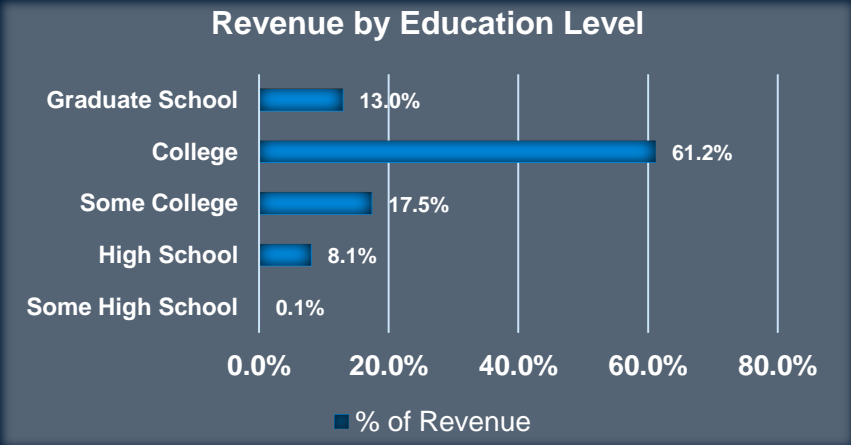
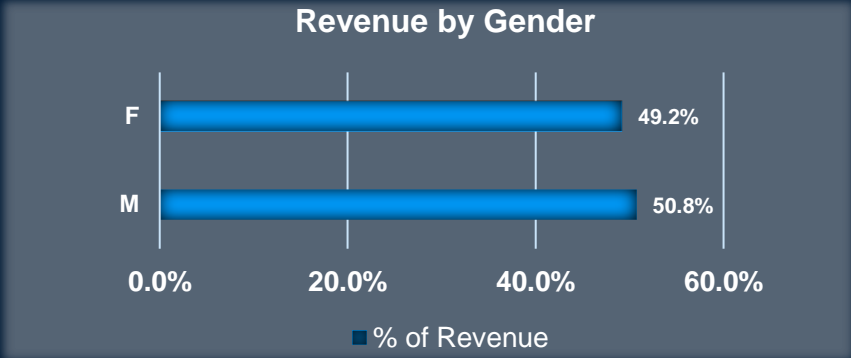
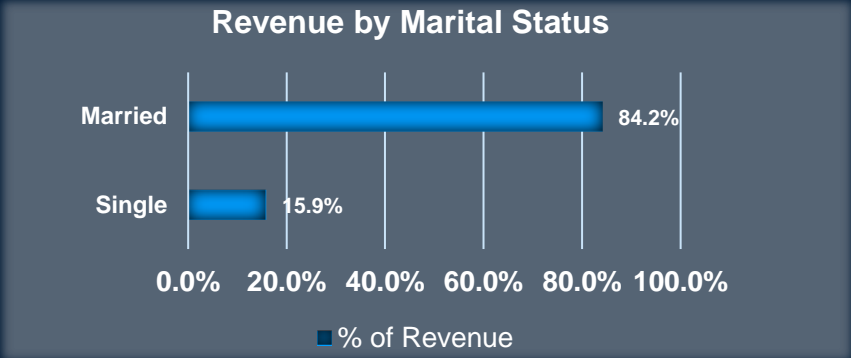
## Revenue by Household Income



## Revenue by Net Worth



# VISITOR DEMOGRAPHICS



# TOP PERFORMING ZIP CODES

Measurement window: October 1, 2019 – April 5, 2020

ZIP	Features	Revenue	Visitors	Revenue %	Yield Per Visitor
XXXXX	Beach- Marriott, Pier, Dining	\$10.9M	18,675	57.6%	\$581
XXXXX	Beach- Hilton, Conference center, dining	\$2.6M	4,931	13.7%	\$524
XXXXX	Attractions	\$2.2M	5,875	11.9%	\$381
XXXXX	Outlet Mall, hotels	\$1.9M	4,541	10.0%	\$415
XXXXX	Downtown	\$462K	1,852	2.5%	\$249
XXXXX	Zoo, Botanical Gardens	\$364K	1,145	1.9%	\$318
XXXXX	Airport, Airport Hotels	\$275K	771	1.5%	\$357

- **57.6%** of measured revenue generated in Destination came from spending within the **XXXXX** ZIP code; Additionally, that measured revenue was driven by **70.0%** of visitors spending within the **XXXXX** ZIP code

# 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





# DMOS IN ACTION

# BRANDS IN ACTION

## CASE STUDY

# CALIFORNIA COASTAL CVB



## OBJECTIVE

Generate awareness of a California destination through cross-device display to drive visitation and measure the Net Economic Impact of Epsilon's delivered media



## STRATEGY/TARGETING

Utilize Core Transact data to target high propensity visitors within 8 client-designated feeder markets



## RESULTS



**\$75K**

Marketing Investment

**\$2.0MM**

Measured Sales

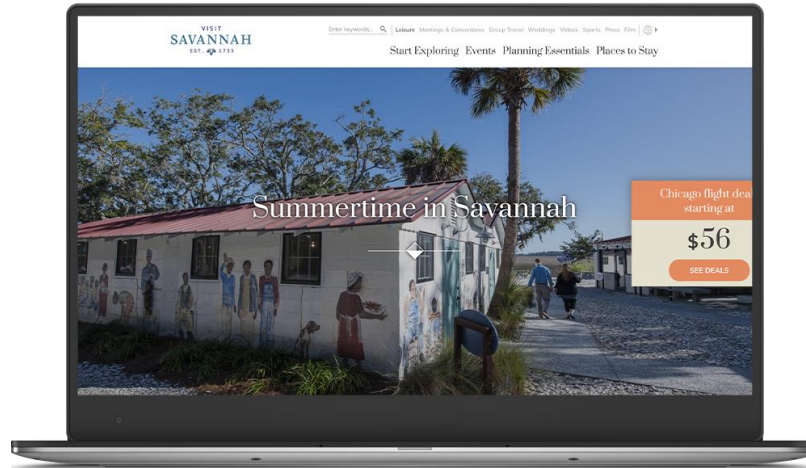
**8.3MM**

Impressions Delivered

**\$26:1**

Measured ROAS

# MEASURING THE COMPLETE ECONOMIC IMPACT OF DIGITAL AD SPEND



“[The lodging ROAS] is one of the best results we’ve ever had, and it’s phenomenal that we can see all of the other data.”

Zeek Coleman, Interactive Marketing Manager, Visit Savannah



## CHALLENGE

- Visit Savannah, a destination marketing organization, wanted to acquire new visitors and accurately measure their spend in town.
- Their goal was to drive awareness through cross-device video, display messaging and unique creative messages.



## SOLUTION

- We focused on individuals from categories like Luxury Travelers, Outdoor Enthusiasts & Health and Wellness Enthusiasts, from selected feeder markets across mobile and desktop.
- We used our Net Economic Impact (NEI) solution to show the financial impact of each visitor with in-depth reporting on non-cash transactions.
  - Provides a full understanding of how many visitors digital marketing influences and the top feeder markets
  - Shows total visitor spend across categories like Dining & Nightlife, Gas & Grocery, Entertainment and more.



## RESULTS

**\$24.4M**

revenue generated

**\$133:1**

total return on ad spend (ROAS)

**\$21:1**

lodging ROAS (2X typical return)



# BRANDS IN ACTION

## CASE STUDY



**20.3M**

in messaged revenue

**\$195:1**

total ROAS

**\$25:1**

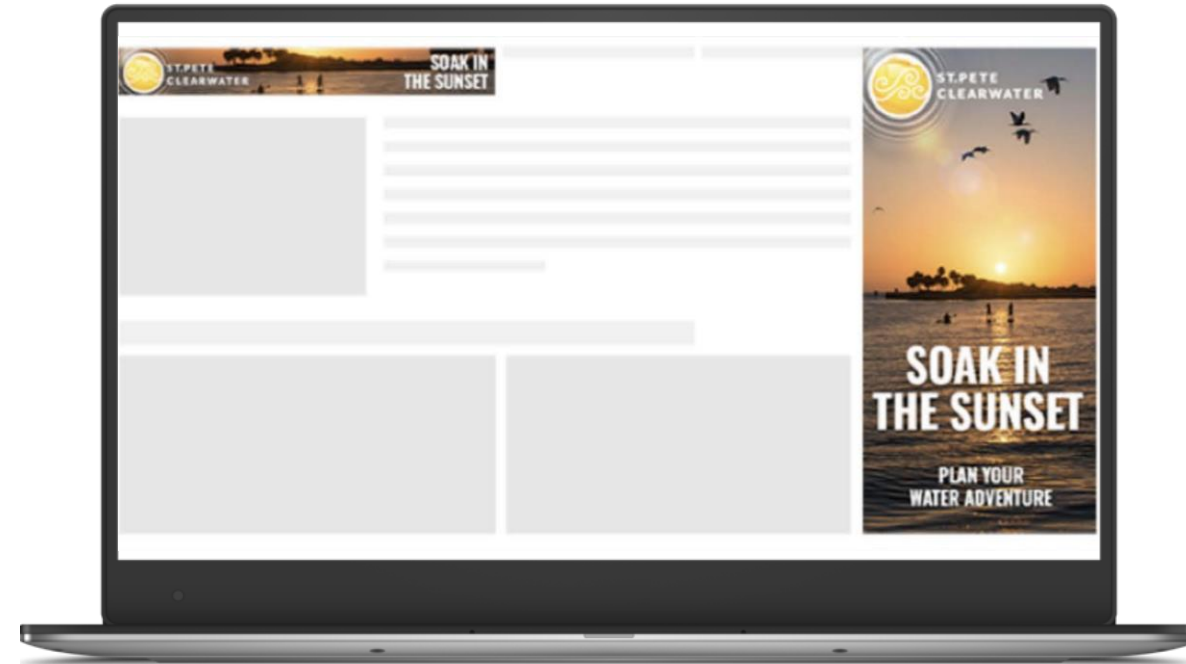
lodging ROAS

“The quality and scale of Epsilon’s first-party online *and* offline data is a huge differentiator—it was the complete data portfolio we needed.”

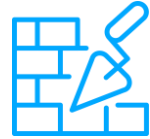
**Leroy Bridges**, Vice President, Digital & Communications at Visit St. Pete/Clearwater



**ST.PETE  
CLEARWATER**



# FINAL THOUGHTS



Ensure you have the right **strategy** in place. Every dollar invested goes towards people who are willing to spend.



Recognize the importance of your marketing investment and how it drives **community impact** and economic growth.



Focus on maintaining a **competitive advantage** during these uncertain times while keeping safety a top priority (share of vacation).



Continue to **understand every consumer** in the tourism market. Personalize your plans for your destination.

# THANK YOU

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