



## MONTEREY COUNTY Meetings Destination Brand Research

May 2017

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# Research Overview

Conventions and group meetings represent an important business segment for Monterey County's tourism industry. The Monterey County Convention & Visitors Bureau (MCCVB) worked with Destination Analysts, Inc. to facilitate research to assess the attitudes, opinions and perceptions of Monterey County and its competitive set amongst meeting planners. This report presents the findings of this survey-based research.

The overarching goal of this research was to deepen the MCCVB's understanding of the destination's position in the meetings industry, examine how CVBs are being utilized by meeting planners, assess the perceptions and attitudes of meeting planners in regard to the Monterey Conference Center renovation and ultimately gather market intelligence to support the future direction of the organization in bringing group meetings to Monterey County.

The research presented in this report was specifically designed to assist the Monterey County Convention & Visitors Bureau in generating information to evolve—and maximize the success of—its group meetings sales strategy as well as deepen the organization's understanding of its meetings destination brand.



# Methodology

This research employed an online survey methodology. The survey was distributed via email invitation to the MCCVB's meeting and event planner contacts (including long-time clients and prospects), as well as Destination Analysts' meeting planner panel. By including both lists, a reliable sample of meeting planners who are both familiar/experienced and less familiar/experience with Monterey County was derived. The survey was fielded between March 16, 2017 and April 20, 2017. In total, 256 completed surveys were collected.



# Definitions

In the remainder of this report, data from the survey findings is broken out into detailed data tables by meeting planner respondents' past experience planning meetings in Monterey County, meeting planner type and industry. The following terms are frequently used, and should be considered as defined below:

**“Total” or “Meeting planners”** refers to the aggregate total of respondents representing all 256 meeting planners who were surveyed in this project.

## Segments by Past Experience Planning a Meeting in Monterey County

- **“Heavy Users”** are meeting planners who have planned three or more meetings in Monterey County in the past three years. This group represents 16.4% of the sample.
- **“Moderate Users”** are meeting planners who have planned one or two meetings in Monterey County in the past three years. This group represents 27.0% of the sample.
- **“Infrequent or Historical Users”** are meeting planners who have planned any meetings in Monterey County in the past three to five years and meeting planners who have planned any meetings in Monterey County more than five years ago.” This group represents 9.4% of the sample.
- **“Never Used”** are meeting planners who have never planned a meeting in Monterey County. This group represents 44.1% of the sample.

## Segments by Meeting Planner Type and Meeting Planner Industry

- Meeting Planner Types: **Corporate— Private sector businesses, Association, SMERF, Government, Non-profit—Charity, Sports groups/organizations, Incentive**
- Meeting Planner Industries: **Software/Technology, Agriculture, Education, Financial, Insurance, Manufacturing, Medical, Pharmaceutical, Telecommunications, Advertising/Marketing, Retail, Other**

## Segments by Convention Center Usage

- **“Convention Center Users”** are respondents who gave “Convention Center Available” a top-two box rating for importance as a factor in destination selection.
- **“Non-convention Center Users”** are respondents who did not give “Convention Center Available” a top-two box rating for importance as a factor in destination selection.

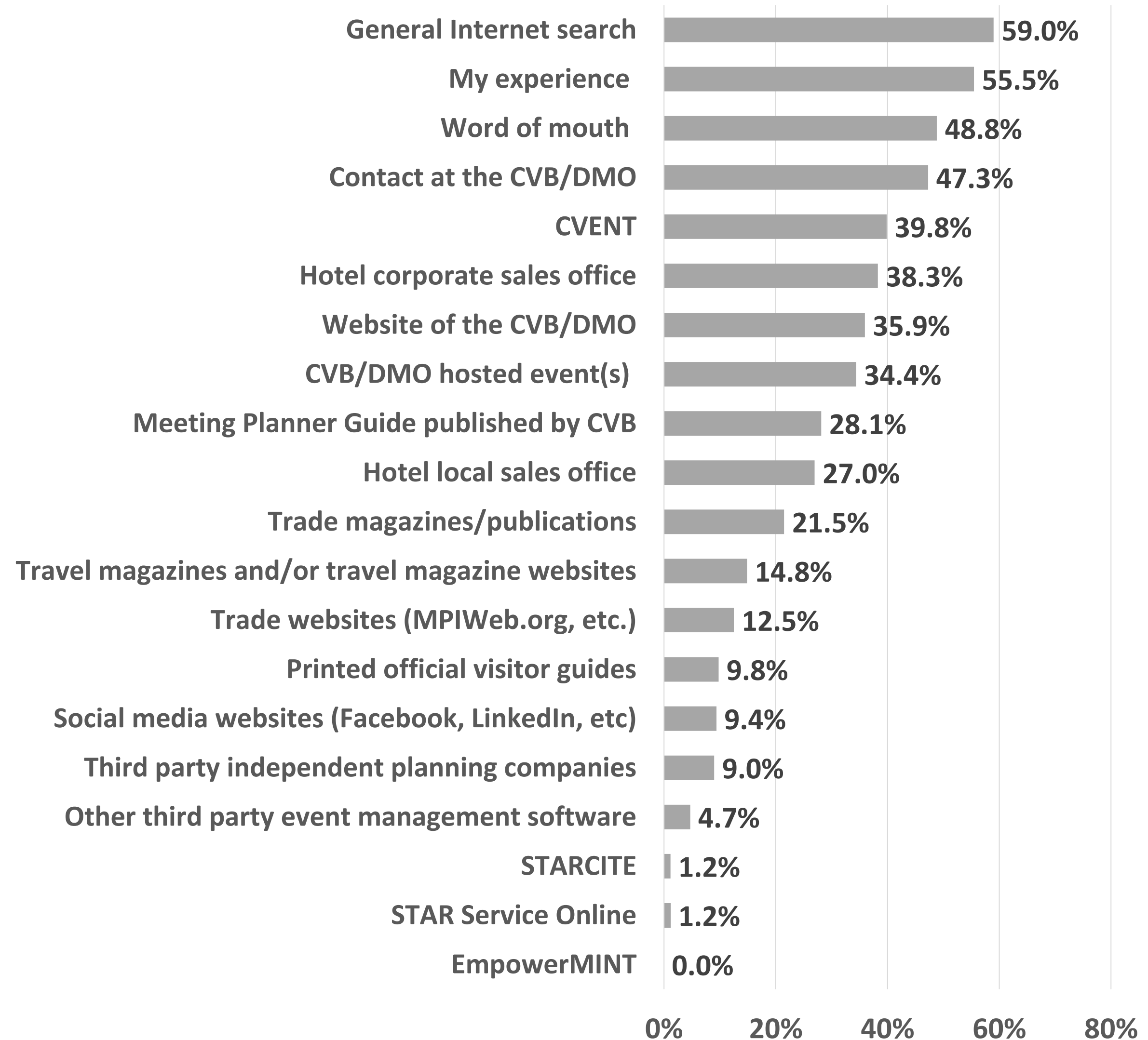


# EXECUTIVE SUMMARY

# Executive Summary

## Resources Used to Research Meetings Destinations

- **The potential for Monterey County to influence meeting planners through its digital marketing efforts is high.** The resource meeting planners most heavily use to research meetings destinations is searches on the Internet (59.0%). Also, over a third regularly use DMO websites. Offline, meeting planners also commonly rely on their own experience planning meetings in various cities (55.5%) and word of mouth advice from colleagues, other planners (48.8%) or their CVB contacts (47.3%). A top second tier of research resources reported by meeting planners include CVENT (39.8%) and hotel corporate sales offices (38.3%). (Page 27)
- **Corporate business may be a significant area where digital focus can influence the destination selection process.** Compared to Association planner types, Corporate planners were significantly more likely to use general internet searches to research destinations to hold meetings (63.2% vs. 54%). (Page 28)
- **Association planners are relatively heavy users of DMO content.** Comparing them to Corporate planners, for example, Association planners are more likely to contact DMOs (60.1% vs. 43.1%), use DMO websites (45.1% vs. 31.9%) and even use printed meeting planner guides (11.5% vs. 9.0%). Government planners have a similar pattern of heavy DMO resource usage in destination research. (Page 28)

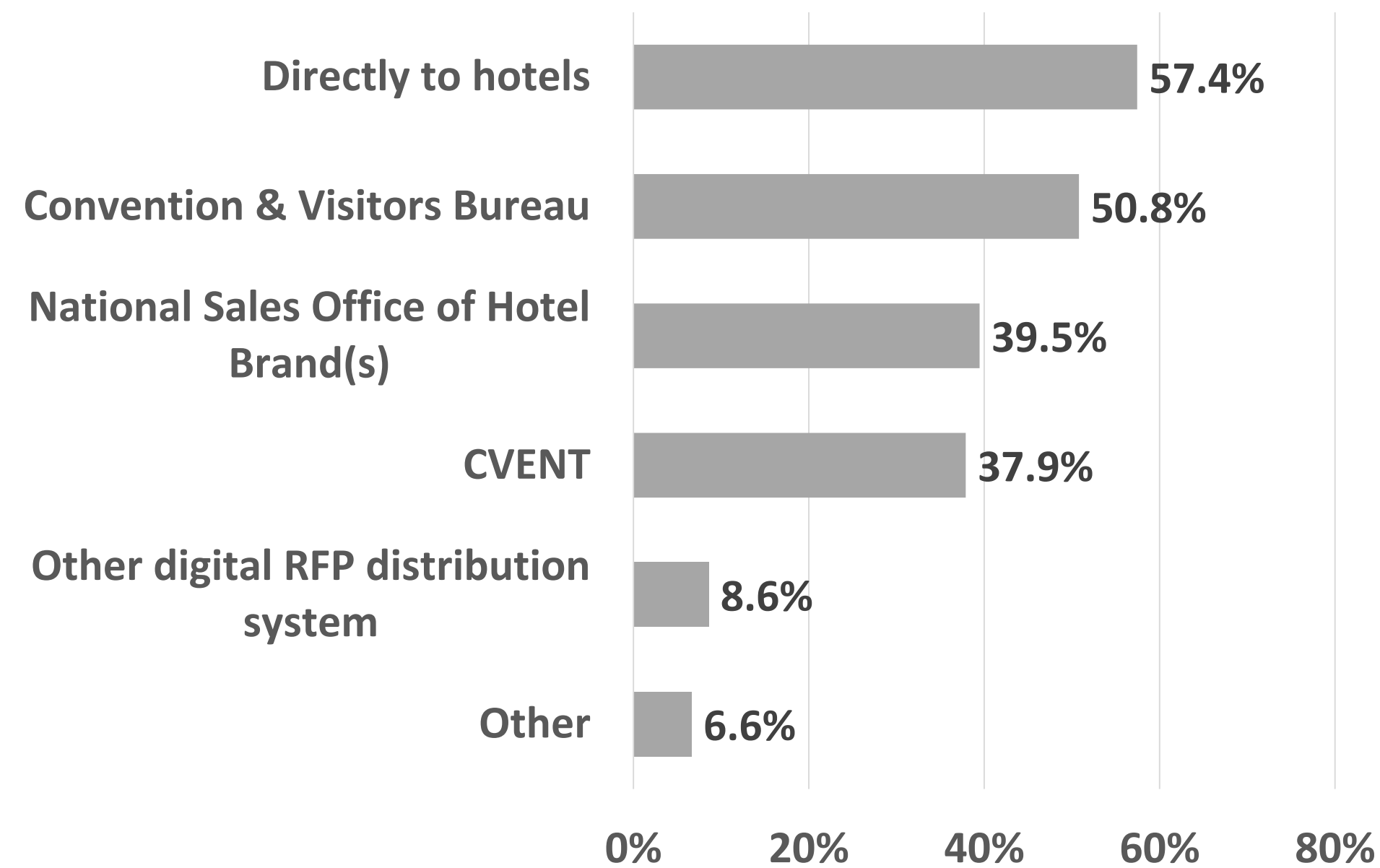


Question: In general, which of the following resources do you regularly access when researching destinations in which to hold meetings or events? (Please only select those that you consider the most important sources.)

Base: All Respondents. 256 completed surveys.

# Executive Summary

## RFP Distribution



Question: Through which channels do you typically distribute your RFPs for your meetings? (Select all that apply)

Base: All respondents. 256 completed surveys.

- **The majority of meeting planners surveyed typically distribute their RFPs directly to hotels and/or CVBs.** Overall, nearly 60 percent report that they usually distribute their RFPs directly to hotels and one half distribute to CVBs. Approximately forty percent reported using the National Sales Office of one or more hotel brands and CVENT channels of distribution. (Page 31)
- **A significant difference exists between planners with and without experience planning meeting in Monterey County.** Those who have never planned a meeting in Monterey County are more likely to distribute RFPs directly to hotels (58.4%) and less likely to distribute through CVBs (38.1%). (Page 32)
- **Corporate planners are most likely to distribute RFPs for their meetings directly to hotels and use CVENT, while Association planners most often go through the Convention & Visitors Bureau.** Over one half of Corporate planners reported using CVENT (53.5%) and directly to hotels (50.7%). Two-thirds of Association planners use CVBs to distribute their RFPs (64.6%). (Page 33)



# Executive Summary

## Familiarity with CVBs

- **CVBs/DMOs are well-known entities in the meeting planner world.** Most meeting planners consider themselves to be familiar with CVBs/DMOs. Nine-in-ten meeting planners surveyed said they are at least somewhat familiar with CVBs/DMOs, with 54.7 percent describing themselves as “very familiar.” Meanwhile, less than ten percent reported being unfamiliar with CVBs. (Page 34)
- **Familiarity with CVBs follows the RFP distribution patterns examined earlier, with Association planners more familiar and Corporate less familiar.** More than 70 percent of both Association planners (and Incentive planners, as well) reported being “very familiar” with CVBs/DMOs. Just 56.9 percent of Corporate planners reported this level of familiarity with CVBs/DMOs. (Page 35)

## CVB Services Used: Large vs. Small Meetings

- **Large meetings appear to require higher levels of CVB participation and more diverse.** In a sense, more opportunity may exist for the DMO to assist meeting planners in executing a successful meeting. Meeting planners were asked to select the CVB services they would be likely to use for a small meeting (50 peak room nights) and a larger one (500 peak room nights.) Across all service types, planners on larger meetings were more likely to state that they would be likely to use the DMO. (Page 38)
- **Whether a large or small meeting, meeting planners would be likeliest to utilize CVB services for advice and recommendations for vendor selection and RFP distribution.** (Page 38)
- **The top CVB service meeting planners planning a large meeting would use is digital marketing materials (59.0%),** followed by advice on vendor selection (50.6%), RFP distribution (49.4%) and welcome signage for attendees (48.2%). (Page 38)
- **For smaller meetings, planners reported that they would be most likely to utilize a local events calendar (47.6%),** RFP distribution (40.0%), advice for vendor selection (35.7%) and personalized hotel selection assistance (35.1%). (Page 38)

Likeliest CVB Service Used—  
Large Meeting:

Digital Marketing Materials (59.0%)

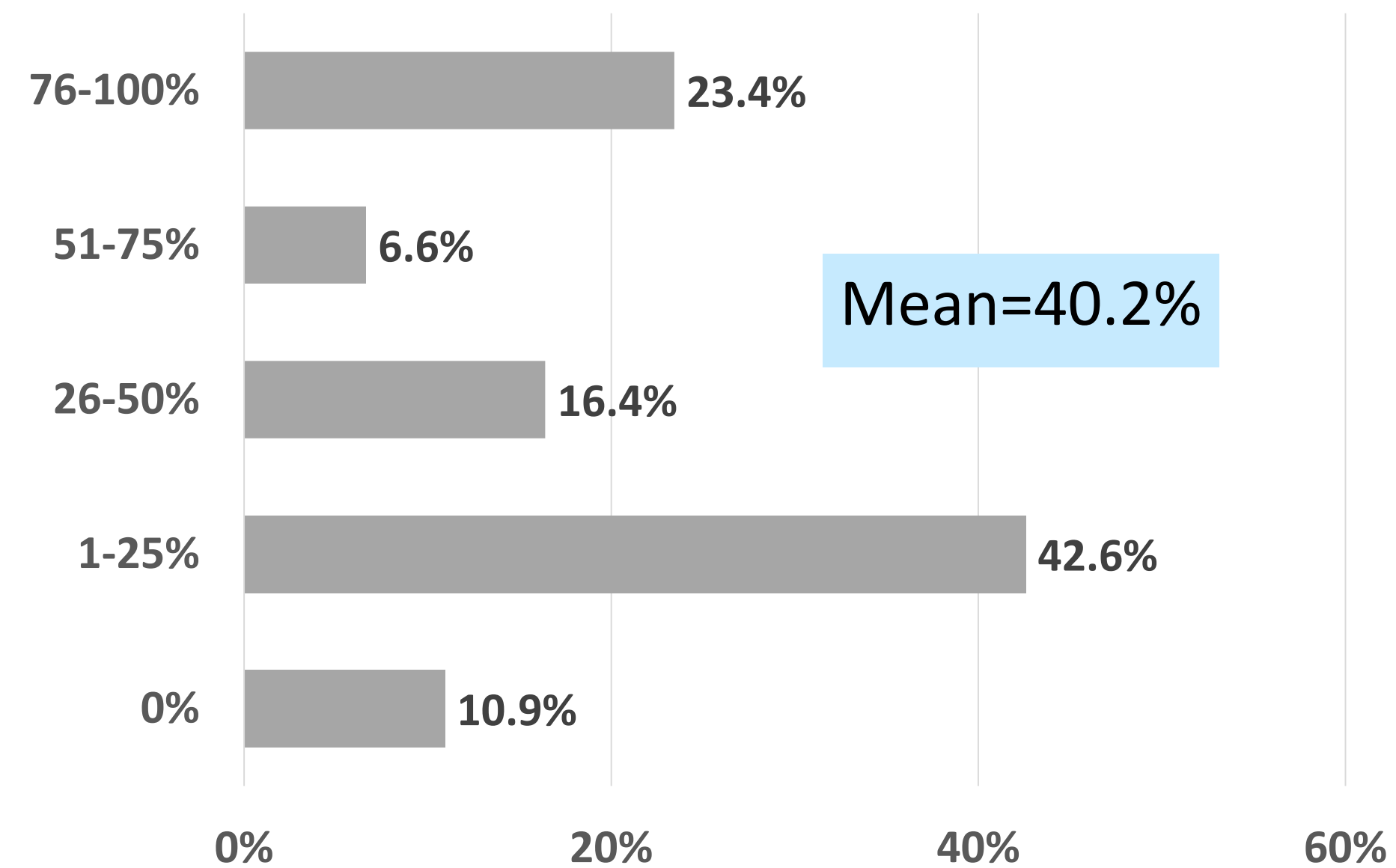
Likeliest CVB Service Used—  
Small Meeting:

Events Calendar (47.6%)

# Executive Summary

## Competitive Situation

Percentage of Meetings California Considered for in Next Two Years



- **Opportunity may exist to influence infrequent Monterey County users to consider the destination for more future meetings they hold in California.** Overall, California will be in the running for less than half of meetings planned by meeting planners surveyed (40.2%). One-in-five planners who have never used Monterey County will not consider any California destinations in the next two years (21.2%). However, of Infrequent or Historic Users, one-quarter reported that they will consider at least one California destination for 76-100% of meetings that they will likely plan in the next two years (25.0%). The Infrequent User niche may be one where Monterey can find some traction in the marketplace. (Page 40)

Question: Please think about the meetings you will likely select a city/destination/site for over the next two years. Approximately what percent of these meetings will you consider one or more destinations in California for?

Base: All respondents. 256 completed surveys.

# Executive Summary

## Competitive Situation

- San Diego and San Francisco appear to be Monterey County’s top overall competitors for meetings.** Despite the fact that over four-in-ten meeting planners surveyed used Monterey County in the past five years (44.1%), San Diego and San Francisco were far more commonly used by these planners. About 60 percent or more of all meeting planners surveyed planned a meeting or event in San Diego (63.3%) and/or San Francisco (60.2%) in the past five years. Higher percentages of even heavy Monterey County users also used San Diego (71.4%) and/or San Francisco. (Page 41)
- Monterey County’s competitive positioning behind San Diego and San Francisco, is again illustrated when ratings of key meetings destination brand metrics are compared.** In all four brand metrics tested (popularity, likelihood of success, ease of holding meetings, familiarity and likelihood of selecting), the destination falls behind San Diego and San Francisco. (Page 47 – 52)

Competitive Set Questions: Top-Two Box Score			
	Top-Two Box Score	Monterey County Rank (out of ten destinations)	Destinations Ranked above Monterey County
Popularity with Attendees	55.1%	4	San Diego, SF, Napa Valley
Likelihood of Having a Successful Meeting	63.3%	3	San Diego, SF
Ease of Holding a Meeting	47.7%	3	San Diego, SF
Familiarity with Monterey's Meetings Product	54.7%	3	San Diego, SF
Likelihood to Select as a Meetings Destination	55.1%	3	San Diego, SF

# Executive Summary

## Competitive Situation

Competitive Set Questions: % Ranking Monterey #1		
	Heavy Users	Never Used
Scenic beauty	40.5%	19.5%
Meetings 0-100 Peak Room Nights	31.0%	5.3%
Association Meetings	23.8%	0.9%
Meetings 100-500 Peak Room Nights	23.8%	2.7%
Wow Factor	21.4%	8.0%
Incentive Meetings	19.0%	2.7%
Price – Value	16.7%	7.1%
Meeting hotels	11.9%	0.9%
SMERF Meetings	7.1%	4.4%
Meetings 500+ Peak Room Nights	7.1%	2.7%
Corporate Meetings	4.8%	2.7%

- **Positive perceptions of Monterey County are correlated with meeting planners' experience.** When compared to meeting planners without experience in Monterey County, Heavy Users of the destination gave Monterey County far higher ratings for all meetings destination brand metrics and destination attributes tested. (Page 53 – 63)

Competitive Set Questions: Top-Two Box Score		
	Heavy Users of Monterey County	Never Used Monterey County
Popularity with Attendees	90.50%	25.70%
Likelihood of Having a Successful Meeting	85.70%	39.80%
Ease of Holding a Meeting	76.20%	21.20%
Familiarity with Monterey's Meetings Product	92.90%	20.40%
Likelihood to Select Monterey as a Meetings Destination	83.30%	25.70%

# Executive Summary

Competitive Set Questions: % Ranking Monterey County as #1			
	% Ranking Monterey County #1	Rank (out of ten destinations)	Destinations ranked above Monterey County
Scenic beauty	30.5%	1	None
Meetings 0-100 Peak Room Nights	16.4%	2	San Diego
Incentive Meetings	10.5%	3	Napa Valley, SF
Meetings 100-500 Peak Room Nights	10.5%	3	SF, San Diego
Wow Factor	14.5%	3	San Diego, SF
Association Meetings	8.6%	4	San Diego, SF, Sacramento
Meeting hotels	5.5%	4	SF, San Diego, Sacramento
Price - Value	12.5%	4	San Diego, Sacramento, San Jose
Meetings 500+ Peak Room Nights	3.1%	6	SF, San Diego, San Jose, Palm Springs
Corporate Meetings	4.3%	7	SF, San Diego, San Jose, Sacramento, Napa Valley, Palm Springs
SMERF Meetings	5.5%	7	SF, San Diego, Sacramento, San Jose, Palm Springs, Lake Tahoe

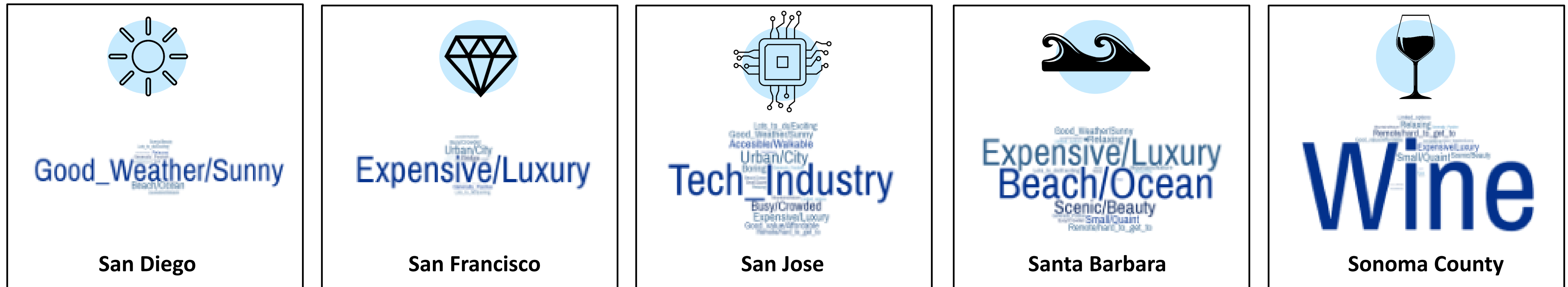
## Competitive Situation

- **When rated head-to-head against the competitive set, Monterey County's strongest meetings destination attributes are scenic beauty, a place for meetings 100 room nights or less on peak, and a destination for incentive meetings. (Page 53 – 63)**

# Executive Summary



## Top Single Description as a Meetings Destination – Monterey County vs. Competitive Set

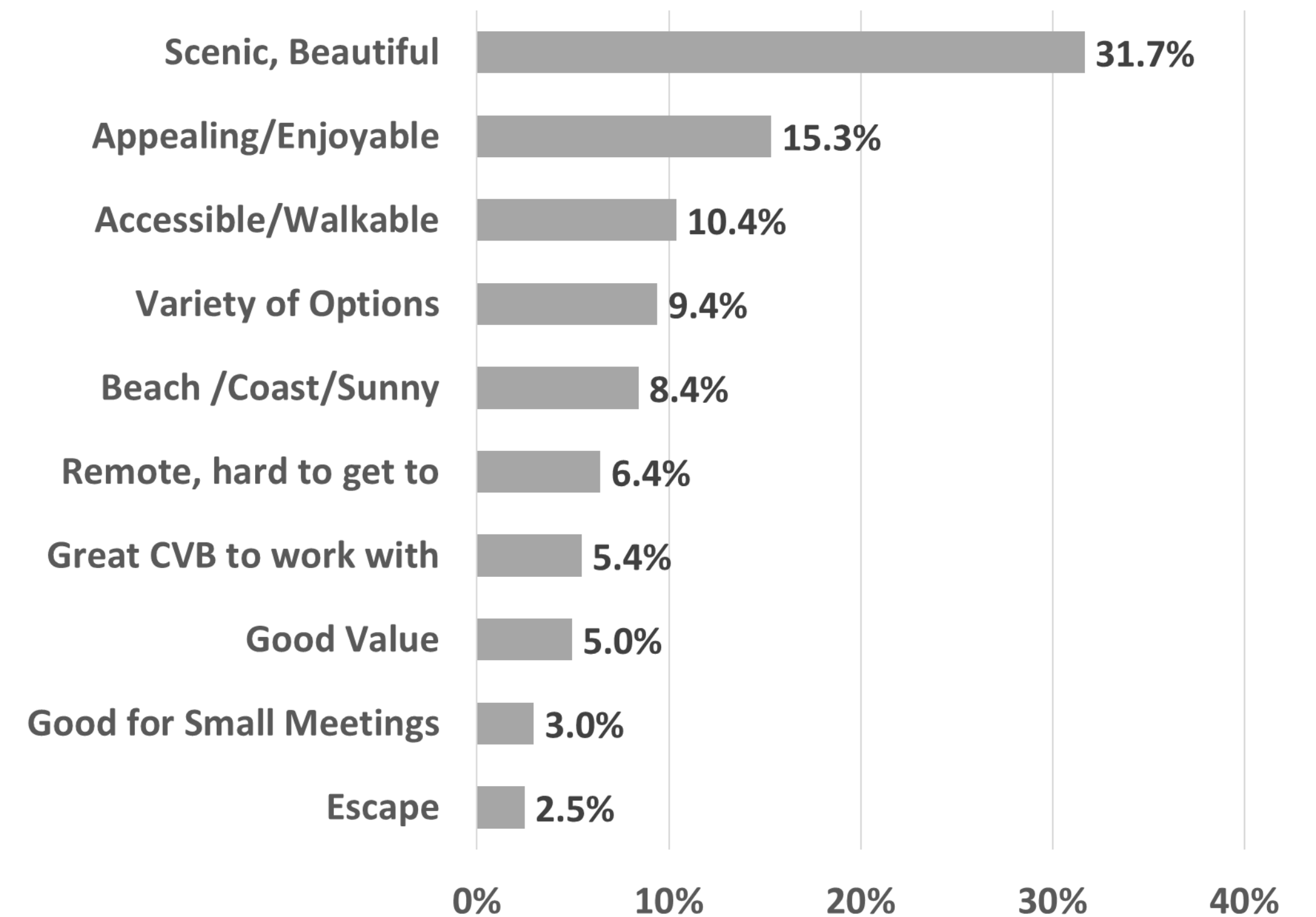


# Executive Summary

## The Monterey County Meetings Brand

- **Meeting planners largely view Monterey County as an appealing meetings destination.** Nearly 70 percent of Heavy Users and nearly 60 percent of Moderate Users rate the destination as "very appealing." (Page 68)
- Even amongst those who have never held a meeting or event in Monterey County, nine in ten consider the destination at least somewhat appealing as a place to hold the meetings they typically plan. **This positive overall destination image suggests potential to position the County as a place for successful meetings amongst planners with less destination experience.** (Page 68)
- **As a meetings destination, Monterey County is largely seen as a beautiful, scenic, walkable and all around enjoyable coastal destination with a variety of options.** (Page 67)

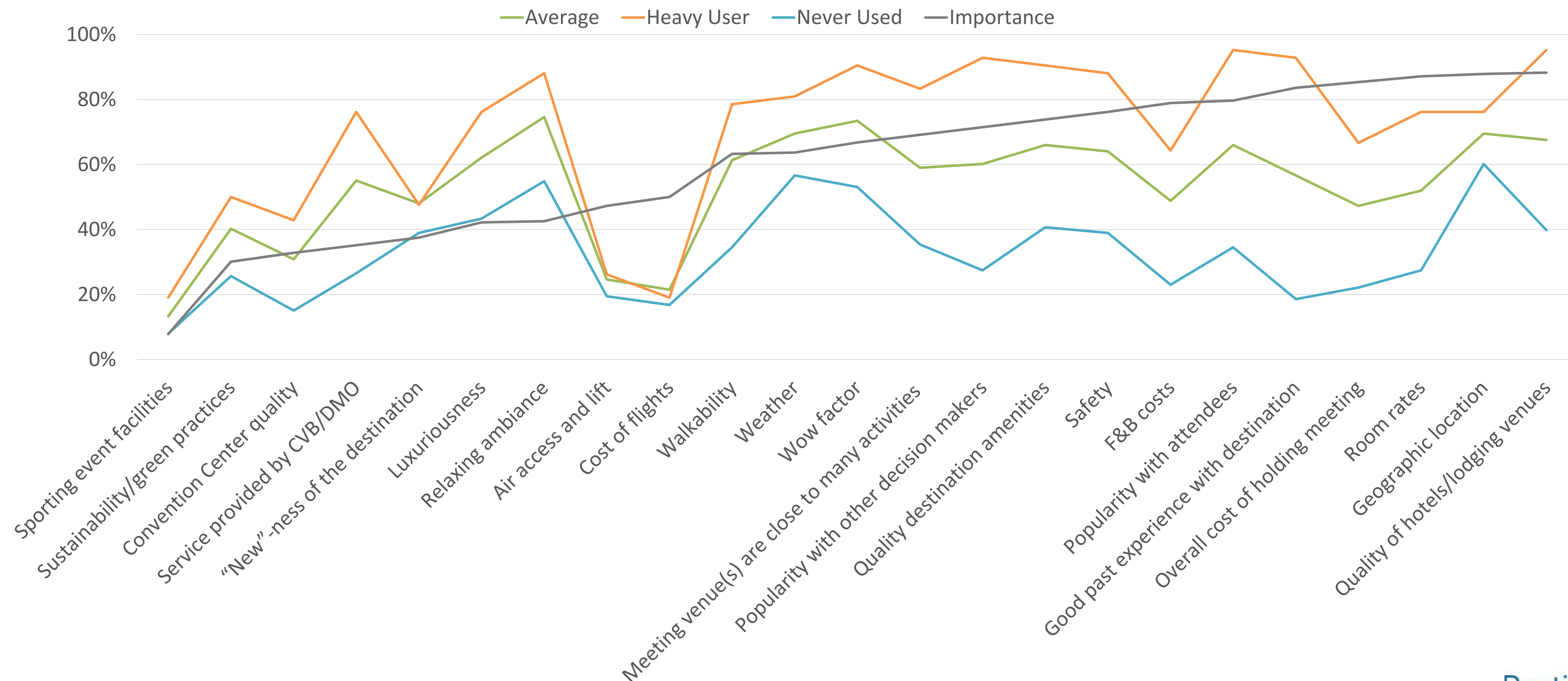
Descriptions of Monterey County as a Meetings Destination (Unaided)



# Executive Summary

## The Monterey County Meetings Brand

- **Of the factors most important to meeting planners when choosing their meetings destinations, Monterey County is highest rated for quality of hotels and lodging venues, popularity with attendees, and geographic location.** Although these are relatively less important to meeting planners, Monterey County is also highest rated as a meetings destination for wow factor and relaxing ambiance. Monterey County is not rated as highly for attributes related to cost, which meeting planners highly value.



- Gray line—The percent of meeting planners who rated an attribute as “Important” or “Very Important” to destination selection
- Orange line—The percent of Heavy Monterey County Users who rated Monterey County as “Good” or “Very Good” for each attribute
- Green line—The percent of all meeting planners surveyed who rated Monterey County as “Good” or “Very Good” for each attribute
- Blue line—The percent of meeting planners who have never used Monterey County Users who rated Monterey County as “Good” or “Very Good”

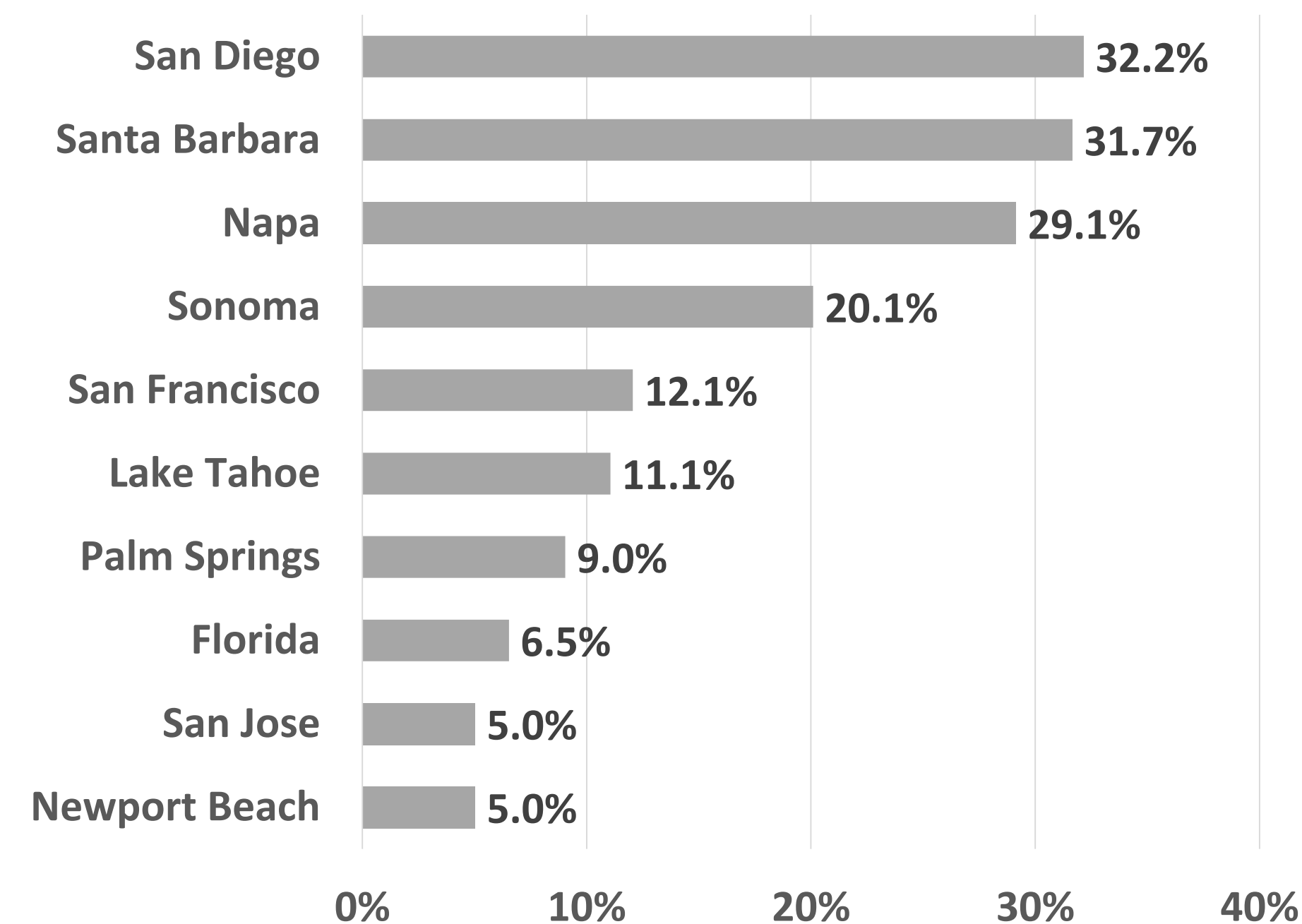


# Executive Summary

## The Monterey County Meetings Brand

- **San Diego, Santa Barbara and Napa Valley are seen as the meetings destinations most similar to Monterey County in terms of the types of meetings it is ideal for.** For the former two, this is largely due to these also being beach and coastal destinations. Santa Barbara and Napa Valley are also perceived as close to Monterey County in scenic beauty, and having similar charm and quaintness of a smaller destination. (Page 73)
- **Monterey County is most widely seen as a destination for smaller meetings of 100 peak room nights or less.** Although Heavy Users are likelier to view Monterey County as more diverse in the meetings sizes it is ideal to host, the strong majority of this group perceives the destination as best for smaller meetings. (Page 75)
- **Monterey County is most commonly perceived as an ideal destination for corporate and incentive meetings, although those with experience largely see it as a good fit for Association meetings, as well.** (Page 76)
- **Monterey County is regarded by meeting planners to be an ideal meetings destination for Financial (50.0%), Software/Technology (48.8%), Pharmaceutical (44.5%) and Medical industries (44.5%).** Meeting planners view Retail and Manufacturing industries to be less of an ideal match for the area's meetings assets with one-in-five selecting those industries. (Page 77)

Meetings Destinations Similar to Monterey County (Unaided)

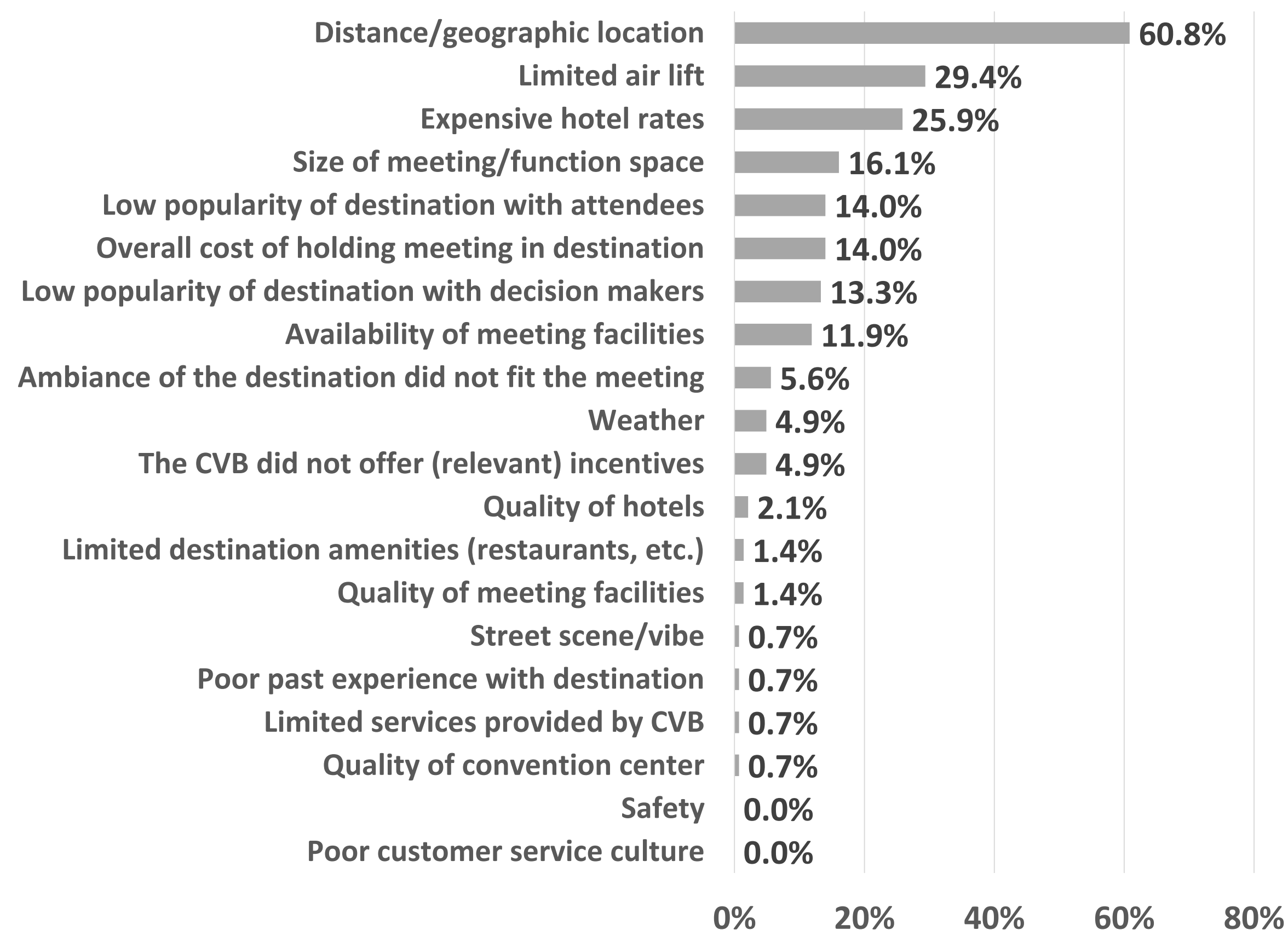


# Executive Summary

## The Monterey County Meetings Brand

- **The top reason that those who have not planned a meeting in Monterey County in the past five years named for not selecting the destination was its (distant) geographic location. (60.8%).** The limited air lift was cited by about 30 percent. Costs, including the destination overall (14.0%) and specifically expensive hotel rates (25.9%), also acted as deterrents. 16.1 percent said that the size of meeting space didn't work for them. Approximately 14 percent cited Monterey County having low popularity with either attendees or decision makers. Note that nearly five percent said their reason was due to the CVB not offering relevant incentives (4.9%), although and less than one percent cited limited services provided by the CVB (0.7%). (Page 78)
- **The meeting planners surveyed—including those who have never held a meeting in Monterey County—have a strong likelihood to contact the CVB should they plan a meeting there.** Fully 71.4 percent of Heavy Users said they would be certain to contact the CVB (10 on a 10-point scale). Over half of those that had never planned a meeting in Monterey County said they had a strong likelihood to contact the CVB if they were to plan a meeting there (rating their likelihood of reaching out to MCCVB an 8,9 or 10 on a 10-point scale). (Page 79)

### Reasons for Not Selecting Monterey County as Meetings Destination (Past Five Years)



# Executive Summary

## The Monterey County Meetings Brand

- **Over half of Convention Center Users have some level of awareness of the renovation of the Monterey County Conference Center.** Amongst Convention Center Users, 26.5 percent reported that they were “Somewhat aware” and 27.9 percent were “Very aware” of the Monterey County Conference Center renovation (54.4%). With 45.6 percent of Convention Center Users who were “Unaware,” there is an opportunity to build awareness of the renovation amongst this segment. Nearly 60 percent of Convention Center Users are more interested in Monterey County as a meetings destination due to the Monterey County Conference Center renovation. Of these Convention Center Users, 23.5 percent reported that they were “Somewhat more interested” and 33.8 percent were “Much more interested” in Monterey County as a meetings destination as a result of the renovated Monterey County Conference Center (57.3%). (Page 81-82)

### Awareness of Monterey County Convention Center Renovation

	Total	Convention Center Users	Non-Convention Center Users
<b>Very aware—know at least some details</b>	22.7%	27.9%	21.6%
<b>Somewhat aware—had heard this but don’t know details</b>	20.3%	26.5%	19.3%
<b>Unaware</b>	57.0%	45.6%	59.1%
<b>Base</b>	<b>256</b>	<b>68</b>	<b>171</b>

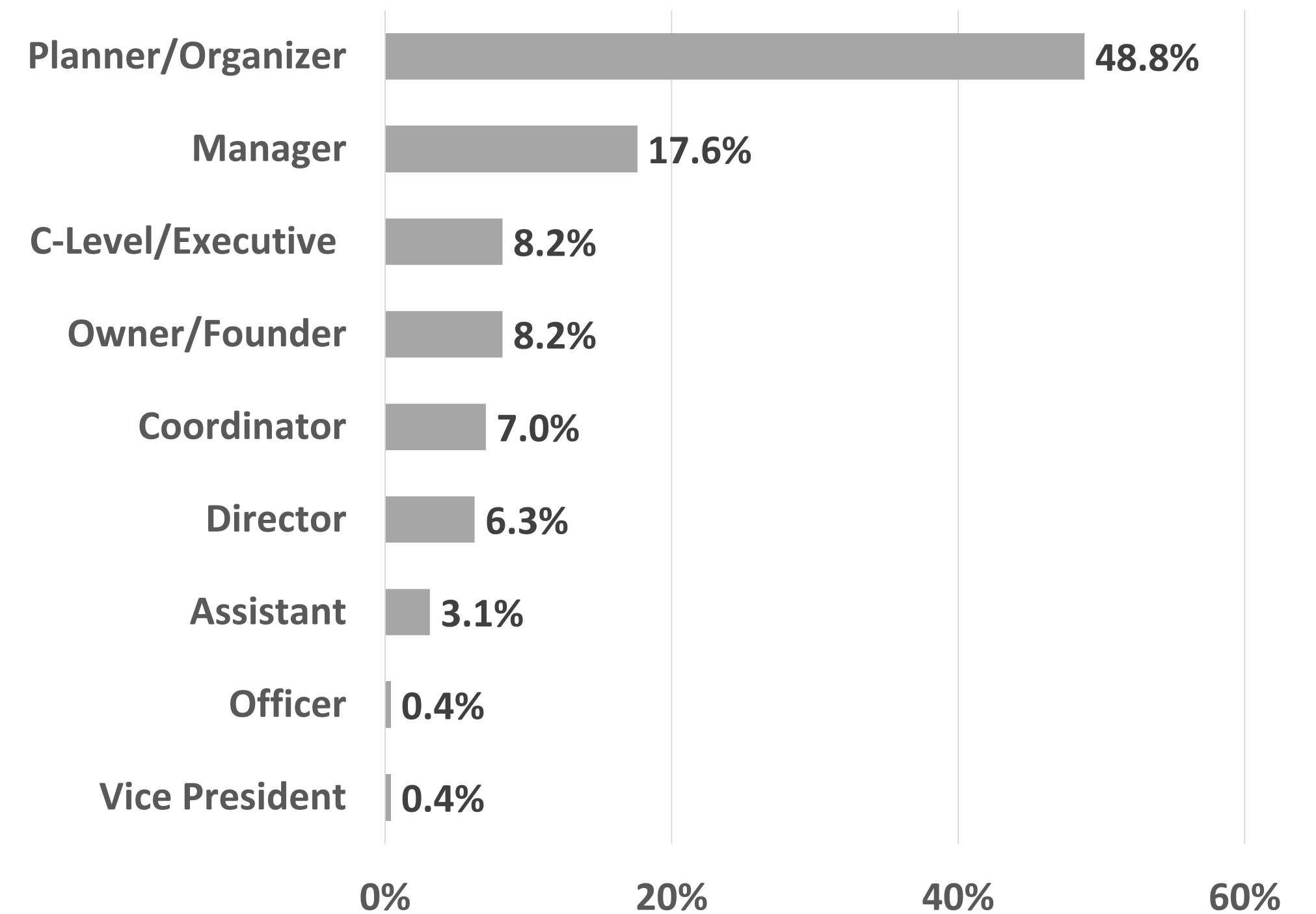


# PROFILE OF MEETING PLANNERS

# Professional Job Title

**Most meeting planners surveyed are planners/organizers or high level managers and up.** Nearly half of all meeting planners surveyed hold the professional job title of planner or organizer (48.8%), 17.6 percent are managers and another 8.2 percent are both C-level executives as well as owners and founders. One-in-ten respondents are coordinators or assistants (10.1%).

**Chart 1: Professional Job Title**



Question: Which of the following best describes your professional job title?

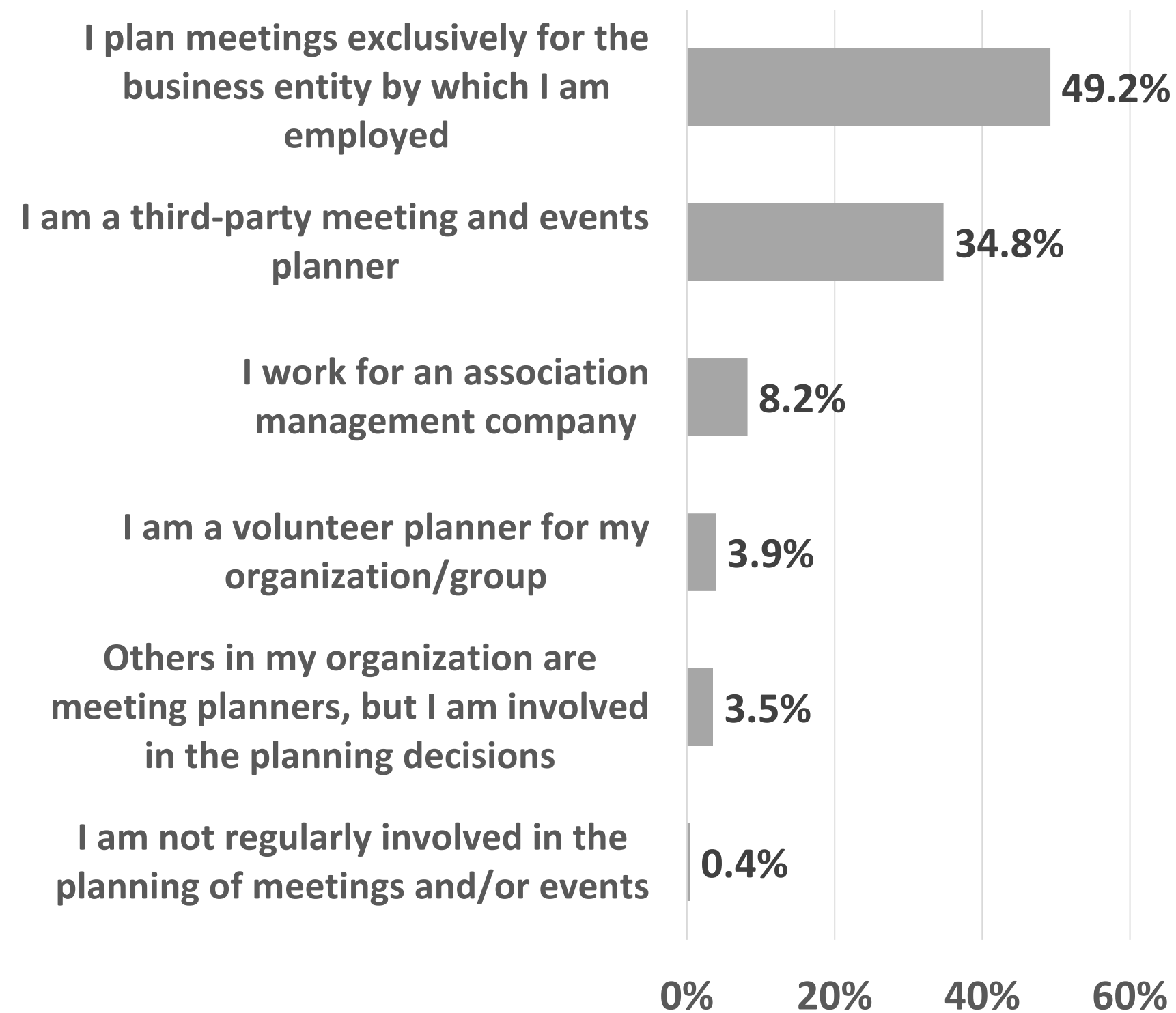
Base: All Respondents. 256 completed surveys.

# Meeting Planner Type and Level of Influence in Destination Selection

The largest proportions of meeting planners surveyed plan meetings for the business they are employed by or as a third-party planner and have a high level of influence on the destination selection. Half are planning meetings exclusively for business entity or organization (49.2%) and approximately one-third are third-party meeting and events planners (34.8%). Respondents reported a mean of 4.1 on a scale of 1 to 5 with 1 indicating “Little influence” on the destination selection and 5 indicating “Significant influence.”

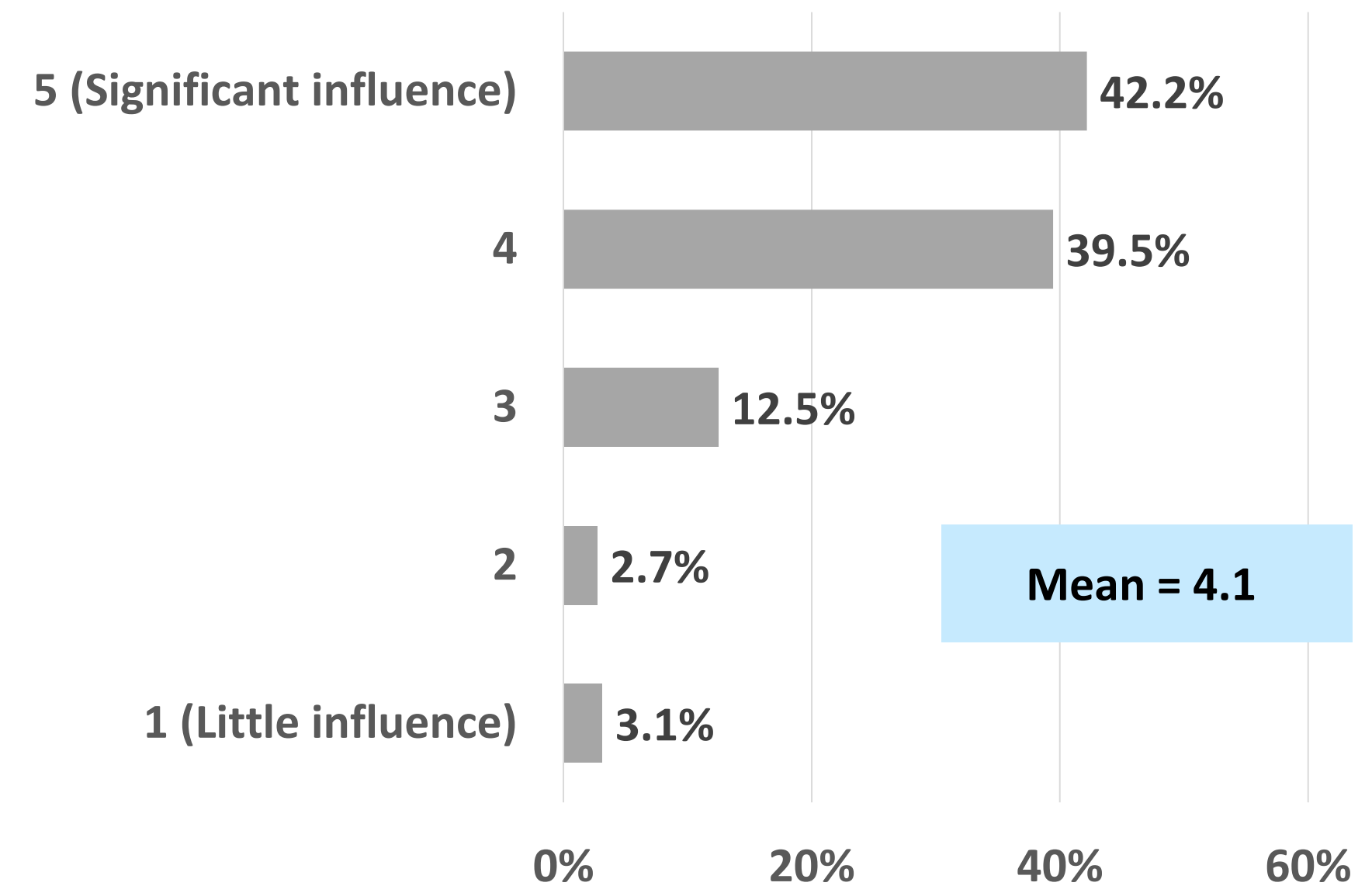
Note: Those that are not regularly involved in the planning of meetings and/or events were screened out.

**Chart 2: Type of Meeting Planner**



Question: Which best describes you? (Select one) Base: All respondents. 256 completed surveys.

**Chart 3: Level of Influence in Destination Selection**

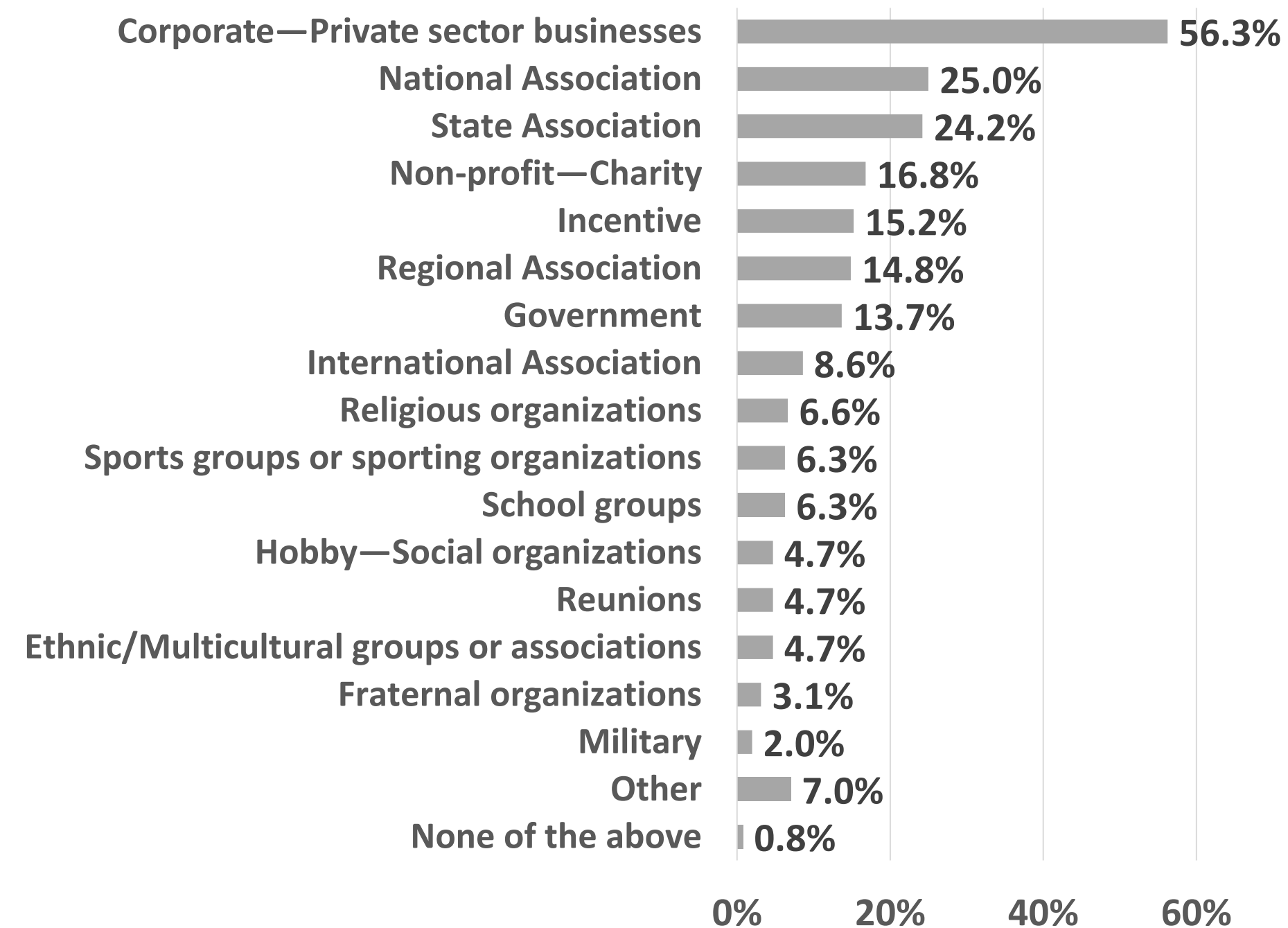


Question: How influential is your opinion on the destination selection for the meetings planned by you and/or your organization? Please use the scale below to indicate the level of influence you have on the ultimate destination selection. Base: All respondents. 256 completed surveys.

# Meeting Groups and Industry Types

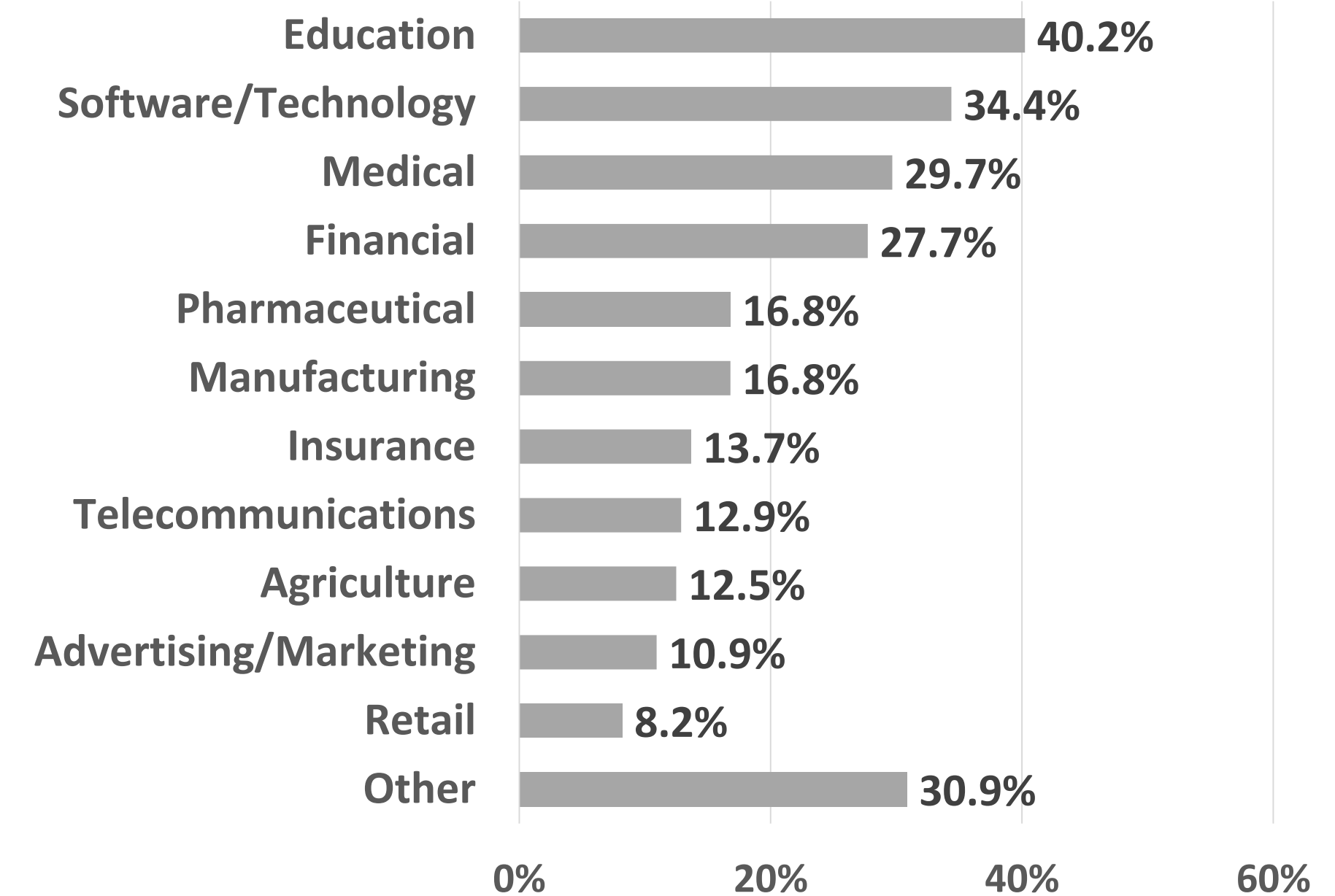
The largest proportion of meeting planners surveyed typically plan meetings for Corporate and Association groups. They have the most experience planning meetings for Education (40.2%), Software/Technology (34.4%), Medical (29.7%) and Financial industries (16.8%). Over half of respondents are Corporate meeting planners (56.3%), nearly 45 percent plan meetings or events for Association groups (44.1%) and one-in-five are planners for SMERF groups (19.1%).

**Chart 4: Meeting Groups**



Question: Which types of groups do you most typically plan meetings for? (Select all that apply) Base: All respondents. 256 completed surveys.

**Chart 5: Industry Types**

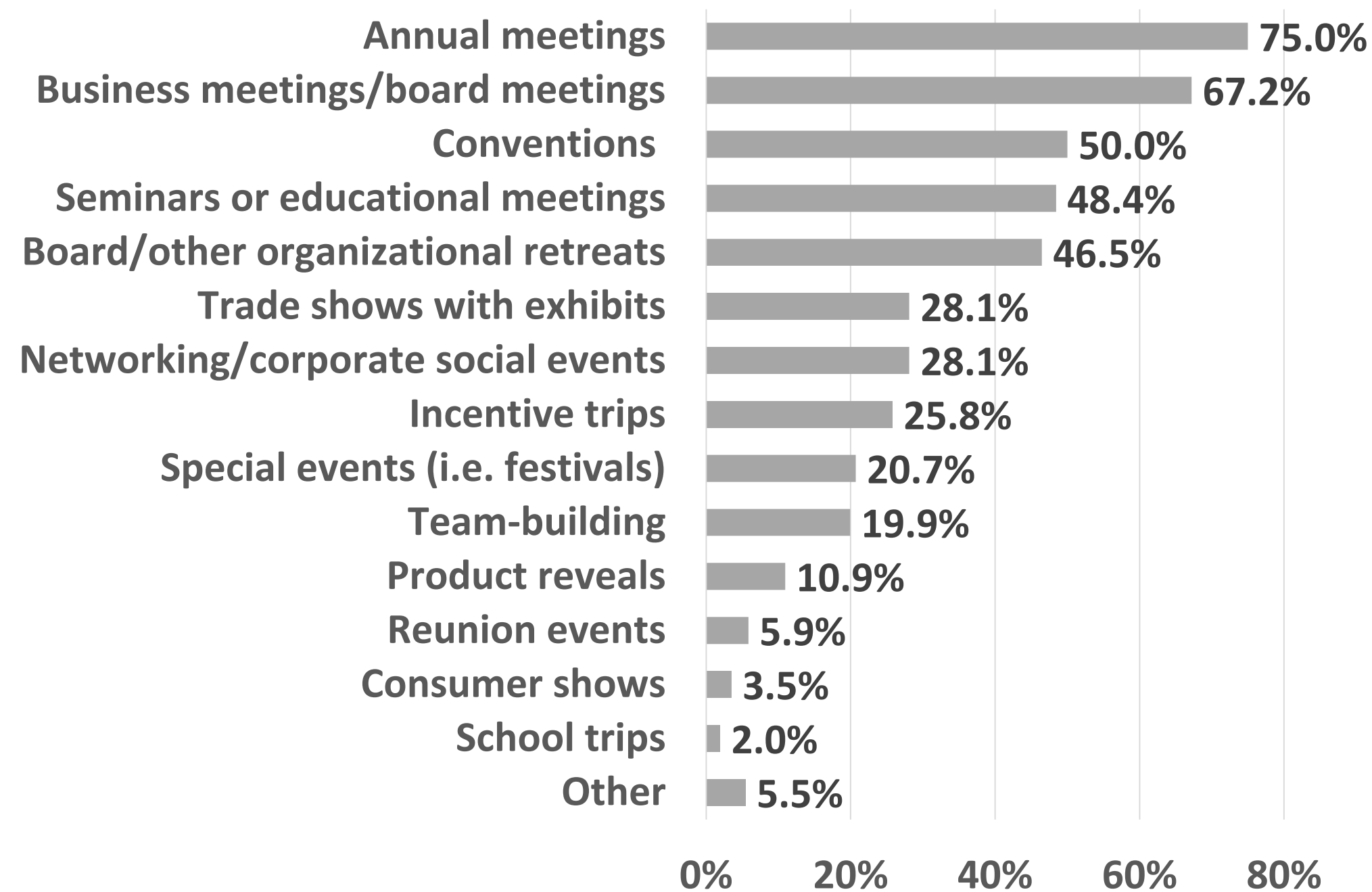


Question: Which of the following industries do you have experience planning meetings for or in? (Select all that apply) Base: All respondents. 256 completed surveys.

# Meeting/Event Type and Size

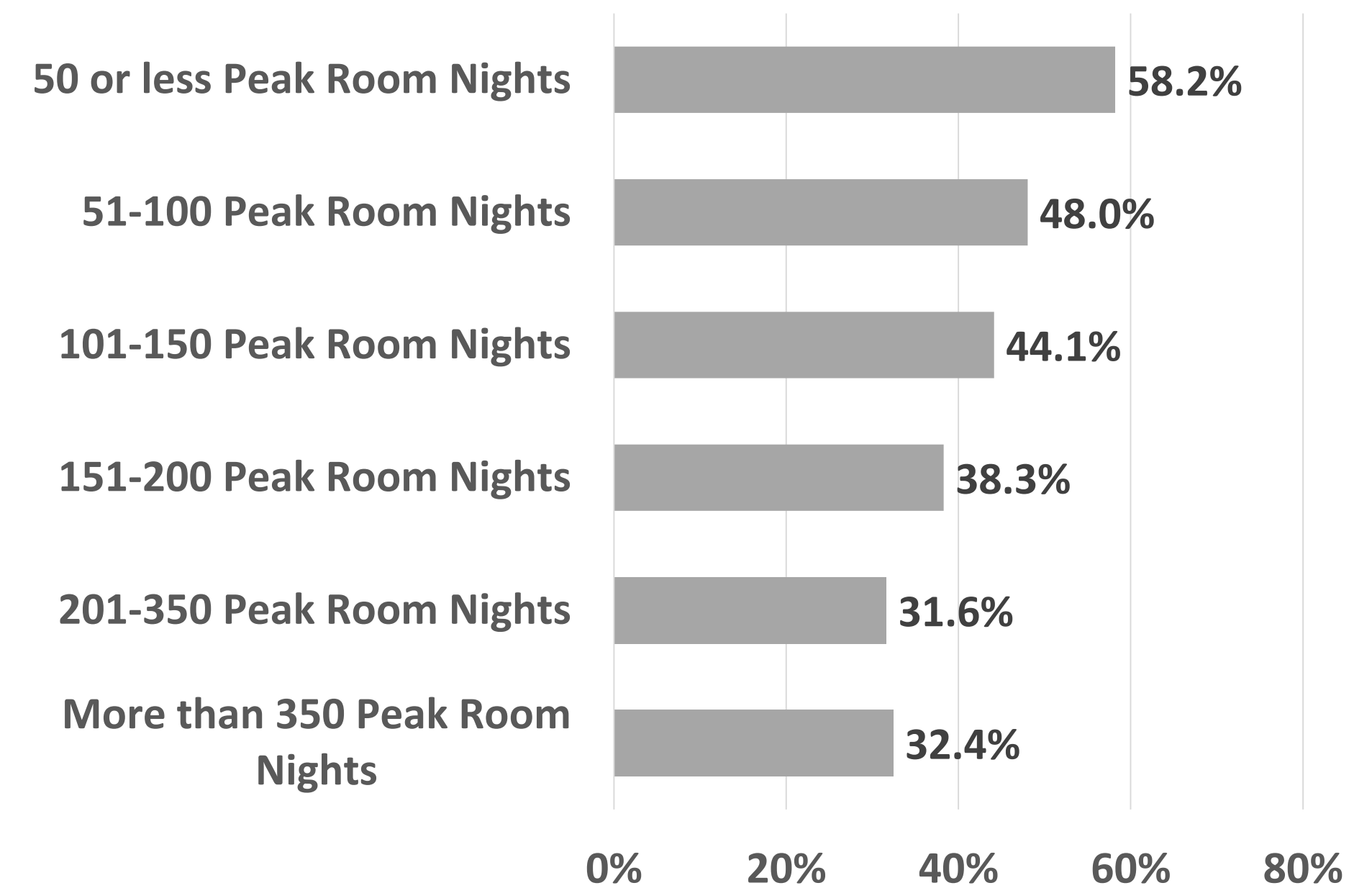
Meeting planners surveyed most typically plan annual, business and board meetings and plan a range of meeting sizes. Three-quarters reported planning annual meetings most frequently and another 67.2 percent said business meetings/board meetings. Approximately half of the planners reported most often planning conventions, seminars or educational meetings, as well as board or other organizational retreats. When asked what size meeting they typically plan in peak room nights they reported a diverse range.

**Chart 6: Meeting/Event Type**



Question: Which best describes the types of meetings/events you typically plan? (Select all that apply.) Base: All respondents. 256 completed surveys

**Chart 7: Typical Meeting Sizes**



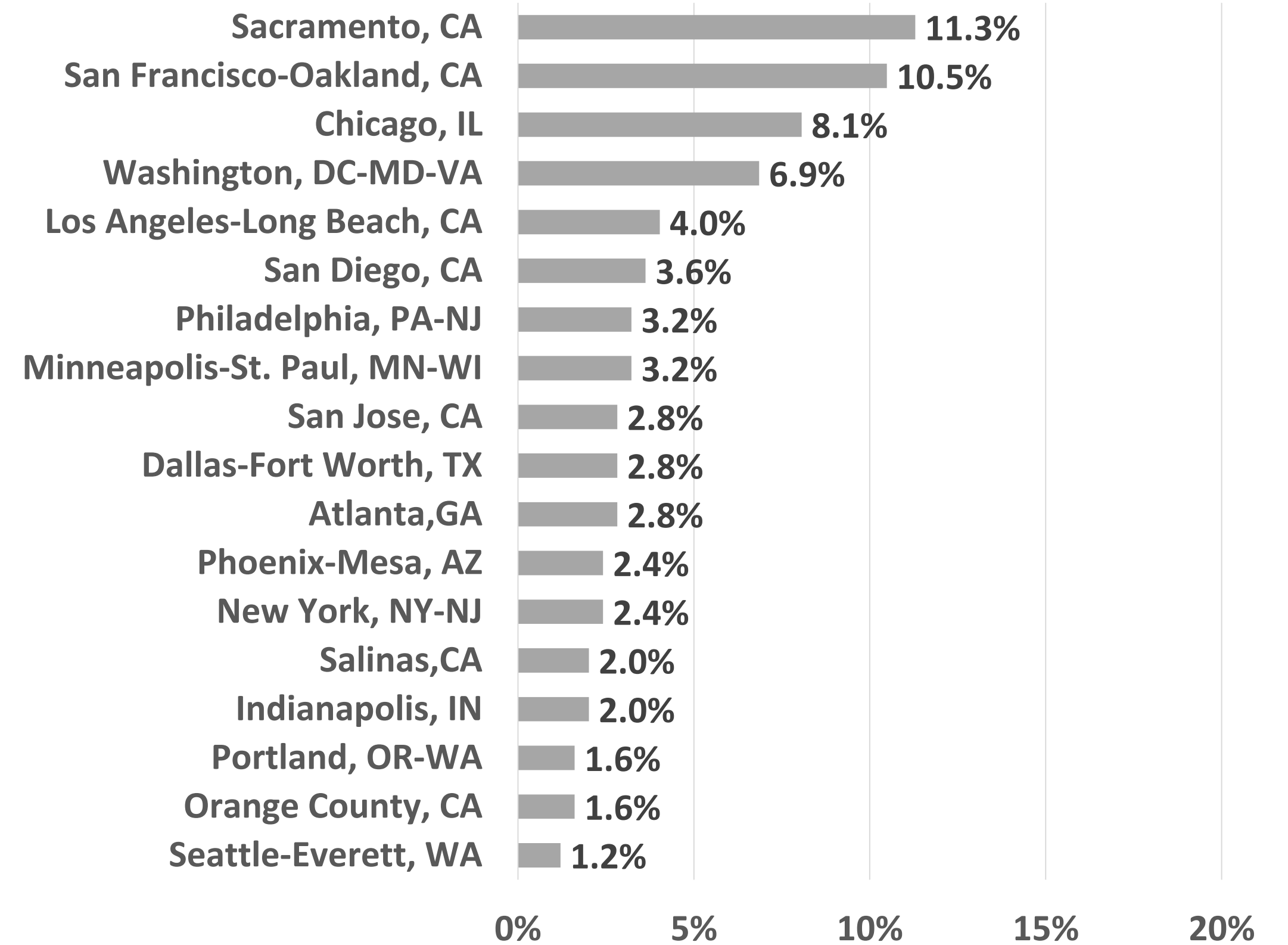
Question: How large are the meetings you typically plan (in peak room nights)? (Select all that apply) Base: All respondents. 256 completed surveys.



# Location

The top locations of meeting planners surveyed includes California MSAs Sacramento, CA (11.3%) and San Francisco-Oakland, CA (10.5%) followed by Chicago, IL (8.1%) and Washington, DC-MD-VA (6.9%).

Chart 8: Location (by MSA)—Top 18



Question: What is your zip/postal code?

Base: All Respondents. 254 completed surveys.



DESTINATION SELECTION PROCESS  
& THE ROLE OF THE CVB

# Resources Used to Research Meetings Destinations

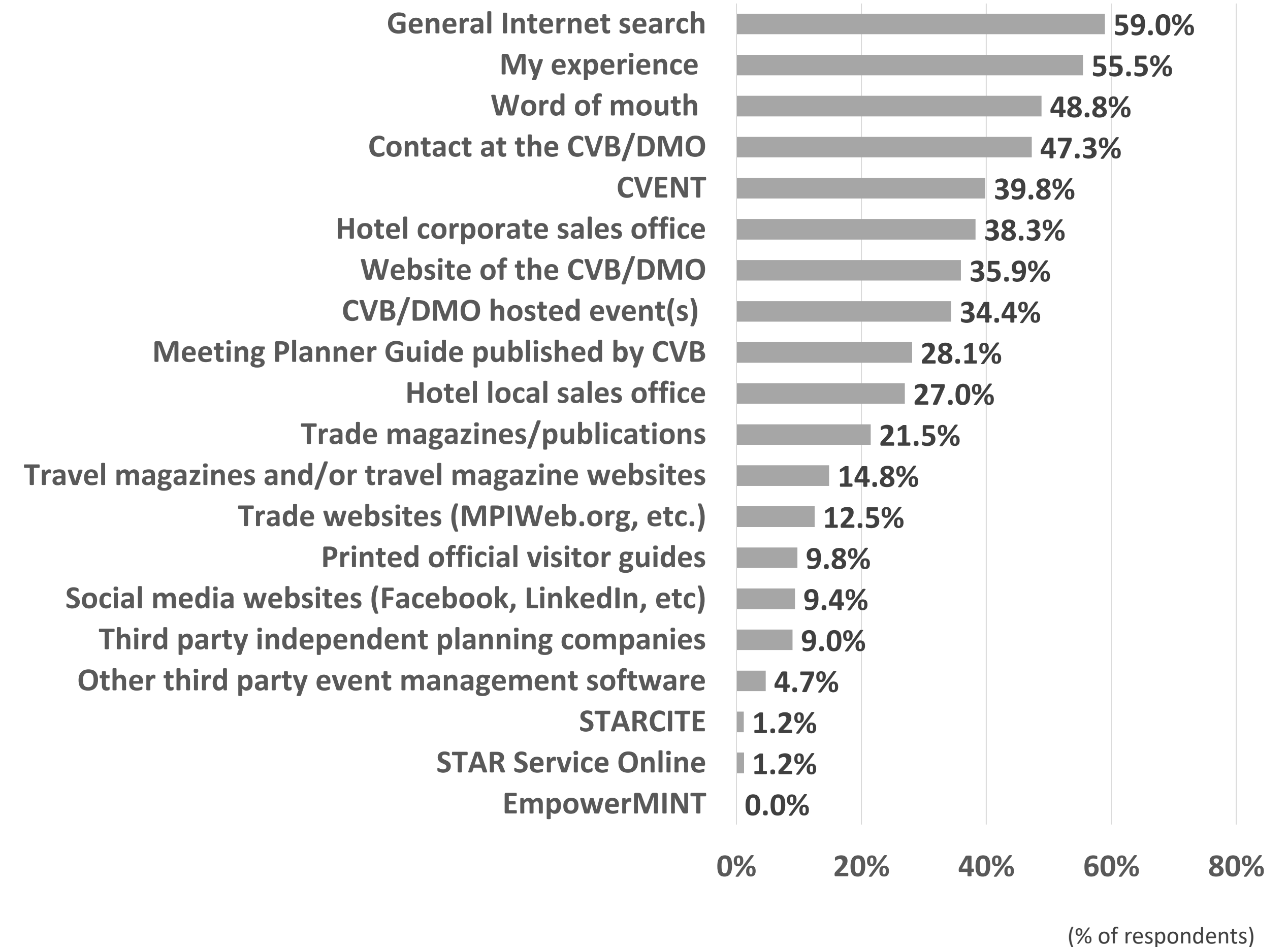
The top tier resources that meeting planners reported using regularly to research meetings destinations were general internet search (59.0%), their own experience planning meetings in various cities (55.5%) and word of mouth advice from colleagues or other planners (48.8%), as well as their CVB contacts (47.3%). Second tier resources for researching meetings destinations include CVENT (39.8%) and hotel corporate sales offices (38.3%).

Two-thirds of meeting planners noted regularly utilizing at least one CVB resource to research meetings destinations (65.2%). Amongst CVB resources nearly half cited contacting the CVB/DMO as a regular resource (47.3%) and approximately one-third access the website of the CVB/DMO (35.9%), as well as CVB hosted events (34.4%). More than a quarter also regularly access the meeting planner guide published by the CVB (28.1%).

Question: In general, which of the following resources do you regularly access when researching destinations in which to hold meetings or events? (Please only select those that you consider the most important sources.)

Base: All Respondents. 256 completed surveys.

Chart 9: Resources Used to Research Meetings Destinations



# Resources Used to Research Meetings Destinations (continued)

A larger proportion of Association planners reported regularly accessing CVB/DMO resources than other meeting planner types, while Corporate planners gravitate towards researching on the internet, CVENT and their own experience. Association planners have a relatively higher percentage of those who regularly utilize a contact at the CVB/DMO (60.2%), CVB hosted event(s) (51.3%), the CVBs website (45.1%), and the official meeting planner guide (35.4%). Over sixty percent of Corporate planners reported regularly researching via general internet search (63.2%), CVENT (54.9%) and their experience (53.5%). CVENT has high level of usage for destination research purposes with all meeting planner types except for Association planners.

## Detail by Type of Planner

	Total	Corporate— Private sector businesses	Association	SMERF	Government	Non-profit— Charity	Sports groups or sporting organizations	Incentive
General Internet search	59.0%	63.2%	54.0%	64.6%	60.0%	67.4%	62.5%	56.4%
My experience	55.5%	53.5%	54.0%	50.0%	51.4%	51.2%	50.0%	66.7%
Word of mouth	48.8%	44.4%	47.8%	45.8%	45.7%	55.8%	37.5%	56.4%
Contact at the CVB/DMO	47.3%	43.1%	60.2%	45.8%	65.7%	44.2%	56.3%	59.0%
CVENT	39.8%	54.9%	35.4%	52.1%	42.9%	48.8%	62.5%	61.5%
Hotel corporate sales office	38.3%	36.1%	42.5%	29.2%	48.6%	27.9%	50.0%	41.0%
Website of the CVB/DMO	35.9%	31.9%	45.1%	29.2%	51.4%	32.6%	31.3%	33.3%
CVB/DMO hosted event(s)	34.4%	32.6%	51.3%	35.4%	60.0%	30.2%	25.0%	48.7%
Meeting Planner Guide published by CVB	28.1%	25.7%	35.4%	22.9%	40.0%	32.6%	12.5%	30.8%
Hotel local sales office	27.0%	24.3%	24.8%	31.3%	34.3%	23.3%	6.3%	28.2%
Trade magazines/publications	21.5%	24.3%	25.7%	25.0%	31.4%	32.6%	37.5%	28.2%
Travel magazines and/or travel magazine websites	14.8%	18.1%	10.6%	14.6%	14.3%	27.9%	6.3%	23.1%
Trade websites (MPIWeb.org, etc.)	12.5%	15.3%	11.5%	12.5%	22.9%	14.0%	6.3%	7.7%
Printed official visitor guides	9.8%	9.0%	11.5%	8.3%	17.1%	14.0%	6.3%	7.7%
Social media websites (Facebook, LinkedIn, etc)	9.4%	10.4%	8.8%	18.8%	20.0%	14.0%	18.8%	7.7%
Third party independent planning companies	9.0%	6.9%	9.7%	14.6%	5.7%	11.6%	6.3%	5.1%
Other third party event management software	4.7%	6.3%	6.2%	6.3%	8.6%	11.6%	0.0%	10.3%
STARCITE	1.2%	2.1%	0.0%	2.1%	2.9%	0.0%	0.0%	2.6%
STAR Service Online	1.2%	0.7%	1.8%	2.1%	2.9%	2.3%	0.0%	0.0%
EmpowerMINT	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Base</b>	<b>256</b>	<b>144</b>	<b>113</b>	<b>48</b>	<b>35</b>	<b>43</b>	<b>16</b>	<b>39</b>

Question: In general, which of the following resources do you regularly access when researching destinations in which to hold meetings or events? (Please only select those that you consider the most important sources.)

Base: All respondents. 256 surveys completed.

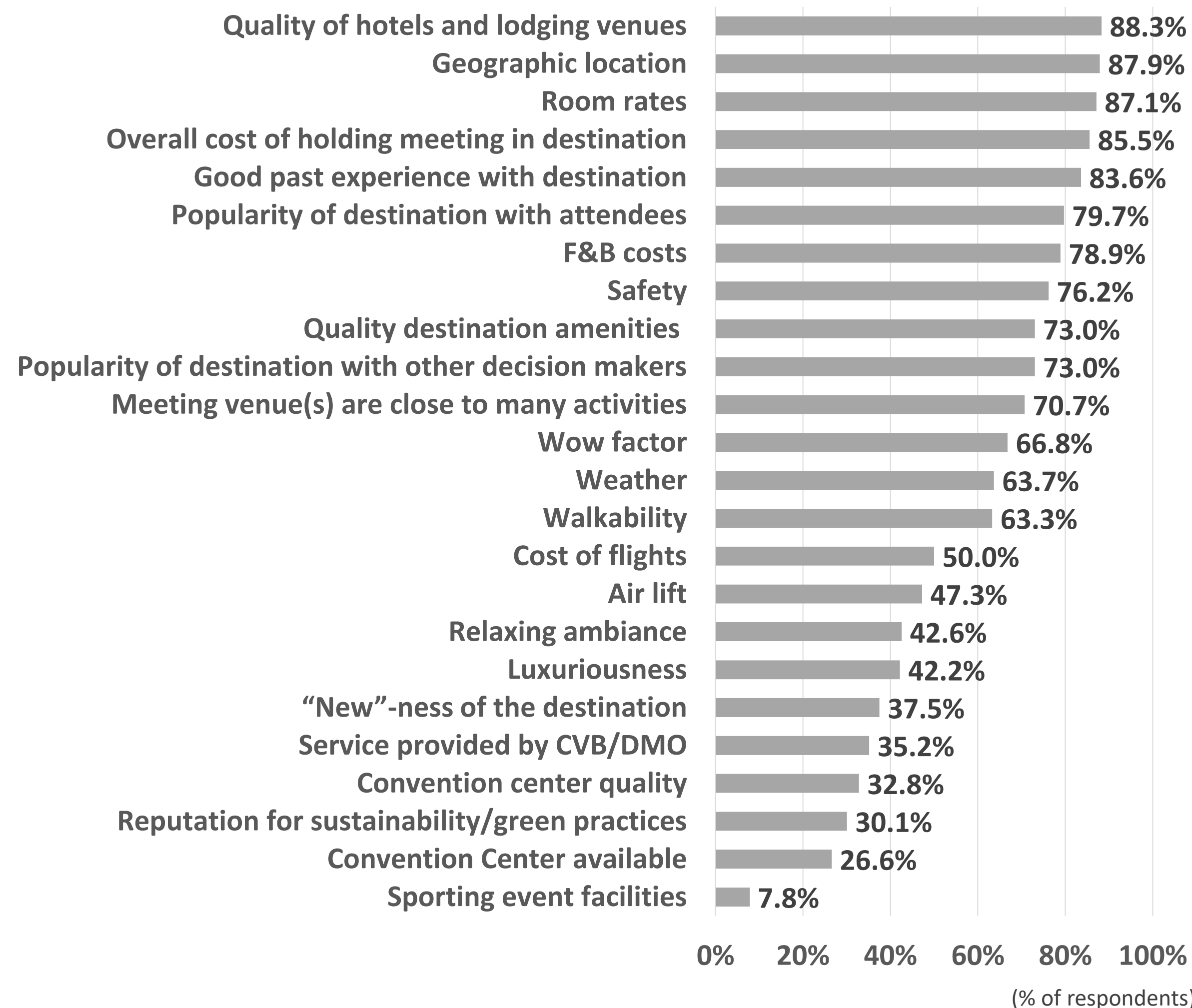
# Important Factors to Meeting Destination Selection

In addition to meeting space, factors that came out as the most important to planners for meeting selection destination were factors related to cost such as room rates, overall cost, food and beverage costs, as well as geographic location, quality of lodging, good past experience and popularity. Nearly nine-in-ten meeting planners found the quality of accommodations (88.3%), geographic location (87.9%) and room rates (87.1%) to be of “High importance” or “Extremely high importance. Services provided by the CVB, luxuriousness, convention center quality and availability, and reputation for sustainability and green practices are relatively less important to meeting planners.

Question: In addition to the size of meetings space meeting your needs, in general, how important are each of the following in determining the destination in which you hold your meetings? Please use the scale from “Extremely low importance” to “Extremely high importance” to rate how important each factor generally is to your meetings destination decision.

Base: All Respondents. 256 completed surveys.

**Chart 10: Important Factors to Meeting Destination Selection – TOP TWO BOX SCORE (Extremely high importance & High importance)**



# Important Factors to Meeting Destination Selection (continued)

Association planners had a larger proportion of those who rated the CVB and convention center as being a factor of “high importance” or “extremely high importance” to meeting destination selection. Luxury is more important for Corporate planners with more than half giving “Luxuriousness” a top-two box score for importance (53.5%). Relative to other types of planners, Corporate and Incentive planners rated the “Wow factor” to be more important.

## Detail by Type of Planner—TOP TWO BOX SCORE (Extremely high importance & High importance)

	Total	Corporate— Private sector businesses	Association	SMERF	Government	Non-profit— Charity	Sports groups or sporting organizations	Incentive
Quality of hotels and lodging venues	88.3%	87.5%	90.3%	81.3%	74.3%	83.7%	87.5%	94.9%
Geographic location	87.9%	87.5%	90.3%	83.3%	85.7%	83.7%	75.0%	84.6%
Room rates	87.1%	84.0%	88.5%	75.0%	82.9%	83.7%	68.8%	84.6%
Overall cost of holding meeting in destination	85.5%	81.9%	90.3%	77.1%	88.6%	83.7%	62.5%	76.9%
Good past experience with destination	83.6%	85.4%	85.0%	75.0%	82.9%	74.4%	75.0%	74.4%
Popularity of destination with attendees	79.7%	79.9%	85.8%	68.8%	68.6%	79.1%	75.0%	84.6%
F&B costs	78.9%	76.4%	85.8%	66.7%	68.6%	72.1%	62.5%	76.9%
Safety	76.2%	77.8%	81.4%	68.8%	80.0%	72.1%	62.5%	71.8%
Popularity of destination with other decision makers	73.0%	79.9%	77.0%	62.5%	71.4%	67.4%	68.8%	82.1%
Quality destination amenities	73.0%	78.5%	77.0%	60.4%	60.0%	67.4%	56.3%	79.5%
Meeting venue(s) are close to many activities	70.7%	70.1%	77.0%	58.3%	65.7%	65.1%	62.5%	64.1%
Wow factor	66.8%	76.4%	69.9%	68.8%	65.7%	58.1%	68.8%	79.5%
Weather	63.7%	68.8%	65.5%	56.3%	54.3%	60.5%	68.8%	66.7%
Walkability	63.3%	61.1%	72.6%	52.1%	68.6%	60.5%	50.0%	53.8%
Cost of flights	50.0%	56.3%	57.5%	52.1%	45.7%	46.5%	56.3%	61.5%
Air lift	47.3%	56.3%	58.4%	37.5%	37.1%	34.9%	50.0%	71.8%
Relaxing ambiance	42.6%	45.8%	42.5%	43.8%	45.7%	41.9%	43.8%	43.6%
Luxuriousness	42.2%	53.5%	40.7%	41.7%	37.1%	39.5%	56.3%	51.3%
“New”-ness of the destination	37.5%	47.9%	38.1%	41.7%	42.9%	39.5%	62.5%	48.7%
Service provided by CVB/DMO	35.2%	31.9%	46.9%	33.3%	45.7%	32.6%	18.8%	33.3%
Convention center quality	32.8%	31.9%	43.4%	33.3%	22.9%	34.9%	25.0%	35.9%
Reputation for sustainability/green practices	30.1%	36.1%	28.3%	39.6%	42.9%	41.9%	31.3%	38.5%
Convention Center available	26.6%	20.8%	31.0%	33.3%	20.0%	27.9%	18.8%	17.9%
Sporting event facilities	7.8%	13.2%	6.2%	14.6%	8.6%	7.0%	37.5%	15.4%
<b>Base</b>	<b>256</b>	<b>144</b>	<b>113</b>	<b>48</b>	<b>35</b>	<b>43</b>	<b>16</b>	<b>39</b>

Question: In addition to the size of meetings space meeting your needs, in general, how important are each of the following in determining the destination in which you hold your meetings?  
Please use the scale from “Extremely low importance” to “Extremely high importance” to rate how important each factor generally is to your meetings destination decision.

Base: All respondents. 256 completed surveys.

# Important Factors to Meeting Destination Selection (continued)

## Detail by Type of Industry —TOP TWO BOX SCORE (Extremely high importance & High importance)

	Total	Software/ Technology	Agriculture	Education	Financial	Insurance	Manufact- uring	Medical	Pharmac- eutical	Telecomm- unications	Advertising/ Marketing	Retail	Other
Quality of hotels and lodging venues	88.3%	92.0%	93.8%	84.5%	87.3%	91.4%	88.4%	89.5%	86.0%	90.9%	89.3%	90.5%	89.9%
Geographic location	87.9%	86.4%	90.6%	84.5%	90.1%	88.6%	76.7%	85.5%	90.7%	84.8%	82.1%	81.0%	89.9%
Room rates	87.1%	83.0%	90.6%	86.4%	85.9%	85.7%	86.0%	86.8%	76.7%	81.8%	78.6%	81.0%	89.9%
Overall cost of holding meeting in destination	85.5%	83.0%	81.3%	82.5%	80.3%	80.0%	76.7%	82.9%	81.4%	69.7%	82.1%	81.0%	88.6%
Good past experience with destination	83.6%	78.4%	75.0%	71.8%	83.1%	77.1%	79.1%	86.8%	76.7%	66.7%	82.1%	85.7%	83.5%
Popularity of destination with attendees	79.7%	81.8%	78.1%	75.7%	83.1%	88.6%	76.7%	84.2%	69.8%	81.8%	82.1%	76.2%	82.3%
F&B costs	78.9%	75.0%	75.0%	75.7%	81.7%	65.7%	69.8%	85.5%	81.4%	75.8%	82.1%	66.7%	86.1%
Safety	76.2%	77.3%	68.8%	75.7%	84.5%	77.1%	72.1%	80.3%	79.1%	69.7%	75.0%	66.7%	73.4%
Popularity of destination with other decision	73.0%	78.4%	68.8%	67.0%	81.7%	80.0%	79.1%	75.0%	72.1%	72.7%	78.6%	81.0%	70.9%
Quality destination amenities	73.0%	73.9%	62.5%	65.0%	73.2%	71.4%	74.4%	73.7%	76.7%	63.6%	71.4%	66.7%	70.9%
Meeting venue(s) are close to many activities	70.7%	68.2%	62.5%	65.0%	71.8%	62.9%	69.8%	69.7%	58.1%	60.6%	67.9%	47.6%	75.9%
Wow factor	66.8%	73.9%	65.6%	62.1%	78.9%	74.3%	74.4%	71.1%	67.4%	69.7%	85.7%	81.0%	65.8%
Weather	63.7%	64.8%	62.5%	59.2%	73.2%	68.6%	72.1%	69.7%	76.7%	66.7%	75.0%	57.1%	63.3%
Walkability	63.3%	56.8%	50.0%	59.2%	64.8%	54.3%	65.1%	65.8%	58.1%	57.6%	50.0%	52.4%	69.6%
Cost of flights	50.0%	53.4%	50.0%	46.6%	60.6%	60.0%	53.5%	56.6%	51.2%	54.5%	53.6%	42.9%	45.6%
Air lift	47.3%	56.8%	59.4%	42.7%	64.8%	68.6%	60.5%	56.6%	60.5%	63.6%	42.9%	57.1%	39.2%
Relaxing ambiance	42.6%	38.6%	50.0%	35.9%	53.5%	40.0%	53.5%	40.8%	55.8%	42.4%	57.1%	33.3%	44.3%
Luxuriousness	42.2%	45.5%	59.4%	34.0%	54.9%	48.6%	58.1%	35.5%	46.5%	39.4%	57.1%	42.9%	44.3%
“New”-ness of the destination	37.5%	37.5%	50.0%	28.2%	47.9%	42.9%	51.2%	34.2%	39.5%	45.5%	50.0%	47.6%	34.2%
Service provided by CVB/DMO	35.2%	33.0%	43.8%	45.6%	43.7%	28.6%	34.9%	44.7%	41.9%	39.4%	32.1%	47.6%	25.3%
Base	256	88	32	103	71	35	43	76	43	33	28	21	79

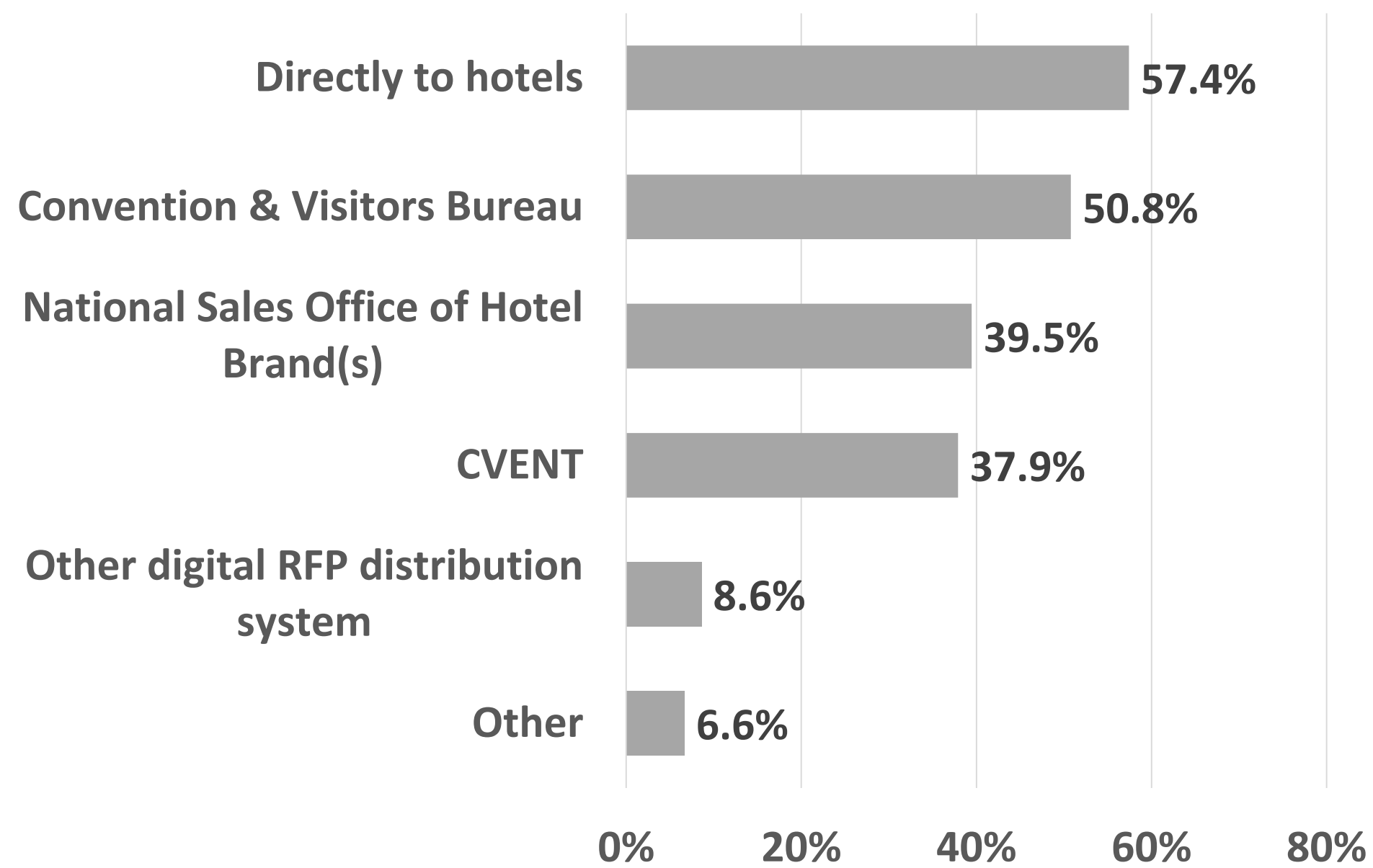
Question: In addition to the size of meetings space meeting your needs, in general, how important are each of the following in determining the destination in which you hold your meetings? Please use the scale from “Extremely low importance” to “Extremely high importance” to rate how important each factor generally is to your meetings destination decision.

Base: All respondents. 256 completed surveys.

# RFP Distribution Channels

**Over half of meeting planners typically distribute their RFPs for meetings directly to hotels and CVBs.** Nearly sixty percent of meeting planners reported distributing directly to hotels and one half distribute to CVBs. Approximately forty percent reported using National Sales Office of Hotel Brand(s) and CVENT channels of distribution. Those who have never planned a meeting in Monterey County are more likely to distribute RFPs directly to hotels (58.4%) and less likely to distribute through CVBs (38.1%).

**Chart 11: RFP Distribution Channels**



Question: Through which channels do you typically distribute your RFPs for your meetings? (Select all that apply)

Base: All respondents. 256 completed surveys.

**Detail by Past Experience in Monterey County**

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
Directly to hotels	57.4%	57.1%	55.1%	50.0%	58.4%
Convention & Visitors Bureau	50.8%	61.9%	65.2%	54.2%	38.1%
National Sales Office of Hotel Brand(s)	39.5%	47.6%	39.1%	33.3%	38.9%
CVENT	37.9%	42.9%	30.4%	29.2%	39.8%
Other digital RFP distribution system	8.6%	2.4%	8.7%	16.7%	9.7%
Other	6.6%	4.8%	2.9%	8.3%	9.7%
<b>Base</b>	<b>256</b>	<b>144</b>	<b>113</b>	<b>48</b>	<b>35</b>



# RFP Distribution Channels (continued)

Corporate planners are most likely to distribute RFPs for their meetings directly to hotels and through CVENT while Association planners most often go through the Convention & Visitors Bureau. Over one-half of Corporate planners reported using CVENT (53.5%) and directly to hotels (50.7%). Two-thirds of Association planners use CVBs to distribute their RFPs (64.6%).

## Detail by Type of Planner

	Total	Corporate— Private sector businesses	Association	SMERF	Government	Non-profit— Charity	Sports groups or sporting organizations	Incentive
Directly to hotels	57.4%	50.7%	52.2%	56.3%	60.0%	51.2%	43.8%	46.2%
Convention & Visitors Bureau	50.8%	39.6%	64.6%	45.8%	71.4%	53.5%	31.3%	43.6%
National Sales Office of Hotel Brand(s)	39.5%	36.8%	46.0%	35.4%	51.4%	34.9%	43.8%	48.7%
CVENT	37.9%	53.5%	36.3%	47.9%	40.0%	46.5%	68.8%	64.1%
Other digital RFP distribution system	8.6%	6.3%	12.4%	8.3%	11.4%	4.7%	6.3%	5.1%
Other	6.6%	5.6%	7.1%	6.3%	8.6%	7.0%	0.0%	5.1%
<b>Base</b>	<b>256</b>	<b>144</b>	<b>113</b>	<b>48</b>	<b>35</b>	<b>43</b>	<b>16</b>	<b>39</b>

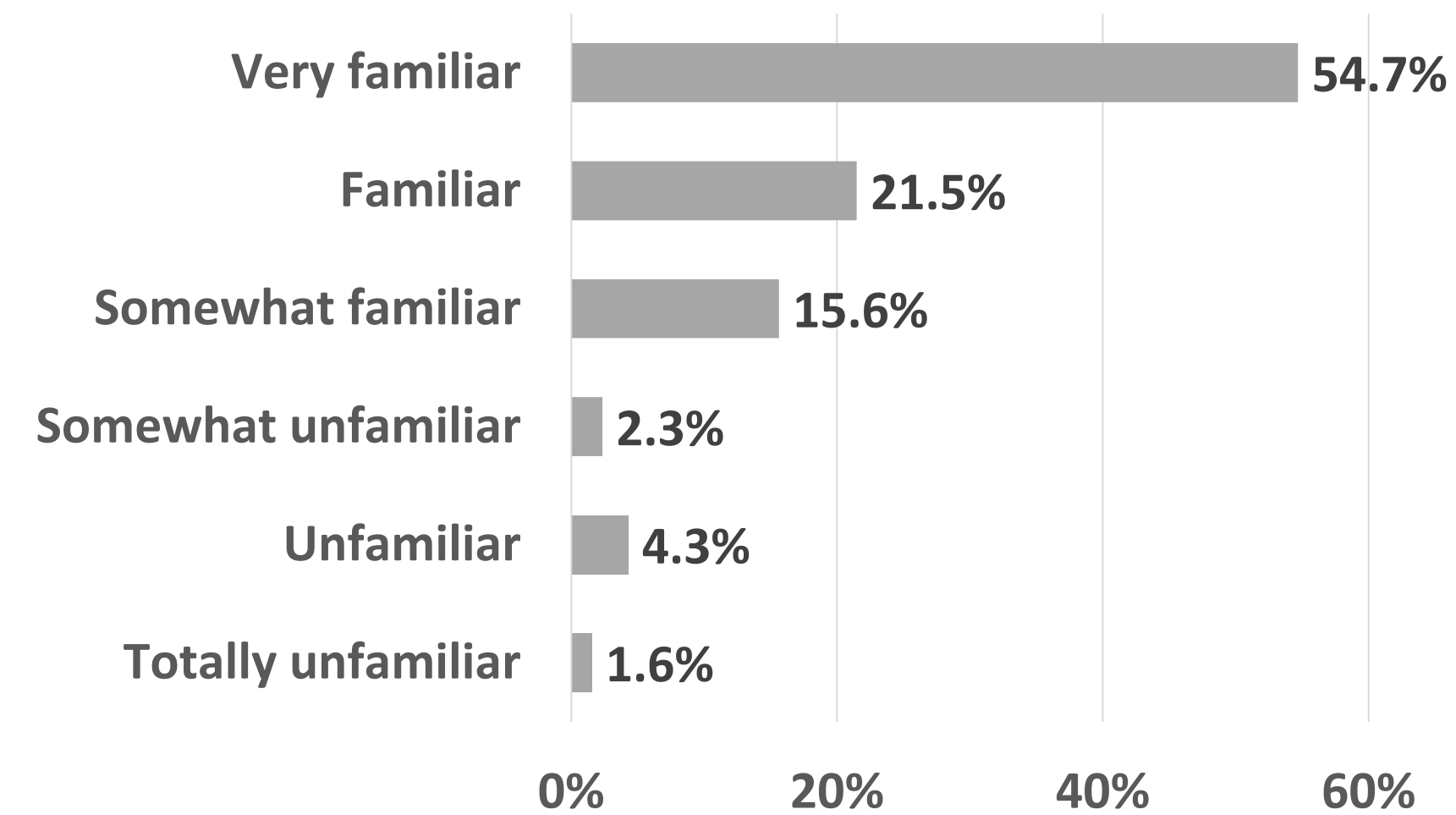
Question: Through which channels do you typically distribute your RFPs for your meetings? (Select all that apply)

Base: All respondents. 256 completed surveys.

# Familiarity with CVBs

A strong majority of meeting planners surveyed are familiar with Convention & Visitors Bureaus and Destination Marketing Organizations. Nine-in-ten meeting planners are at least somewhat familiar with CVBs/DMOs with two-thirds being “Familiar” or “Very familiar.” Less than ten percent reported being unfamiliar with CVBs (“Somewhat unfamiliar” (2.3%), “Unfamiliar” (4.3%) and “Totally unfamiliar” (1.6%).

**Chart 12: Familiarity with CVBs**



**Detail by Past Experience in Monterey County**

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
Very familiar	54.7%	69.0%	59.4%	66.7%	44.2%
Familiar	21.5%	14.3%	21.7%	29.2%	23.0%
Somewhat familiar	15.6%	11.9%	14.5%	4.2%	18.6%
Somewhat unfamiliar	2.3%	2.4%	1.4%	0.0%	3.5%
Unfamiliar	4.3%	2.4%	2.9%	0.0%	7.1%
Totally unfamiliar	1.6%	0.0%	0.0%	0.0%	3.5%
<b>Base</b>	<b>256</b>	<b>42</b>	<b>69</b>	<b>24</b>	<b>113</b>

Question: How familiar are you with Convention & Visitors Bureaus (also known as CVBs and Destination Marketing Organizations/DMOs)? (Select one)

Base: All respondents. 256 completed surveys.

# Familiarity with CVBs (continued)

**Association and Incentive planners are the most familiar with CVBs with nearly 95 percent reporting being at least somewhat familiar.** More than 70 percent of both Incentive and Association planners reported being “Very familiar” with CVBS/DMOs.

## Detail by Type of Planner

	Total	Corporate— Private sector businesses	Association	SMERF	Government	Non-profit— Charity	Sports groups or sporting organizations	Incentive
<b>Very familiar</b>	54.7%	56.9%	70.8%	50.0%	57.1%	51.2%	62.5%	76.9%
<b>Familiar</b>	21.5%	20.1%	14.2%	12.5%	25.7%	16.3%	25.0%	7.7%
<b>Somewhat familiar</b>	15.6%	15.3%	9.7%	18.8%	11.4%	18.6%	0.0%	10.3%
<b>Somewhat unfamiliar</b>	2.3%	2.1%	2.7%	4.2%	0.0%	4.7%	6.3%	5.1%
<b>Unfamiliar</b>	4.3%	4.2%	1.8%	8.3%	2.9%	7.0%	0.0%	0.0%
<b>Totally unfamiliar</b>	1.6%	1.4%	0.9%	6.3%	2.9%	2.3%	6.3%	0.0%
<b>Base</b>	<b>256</b>	<b>144</b>	<b>113</b>	<b>48</b>	<b>35</b>	<b>43</b>	<b>16</b>	<b>39</b>

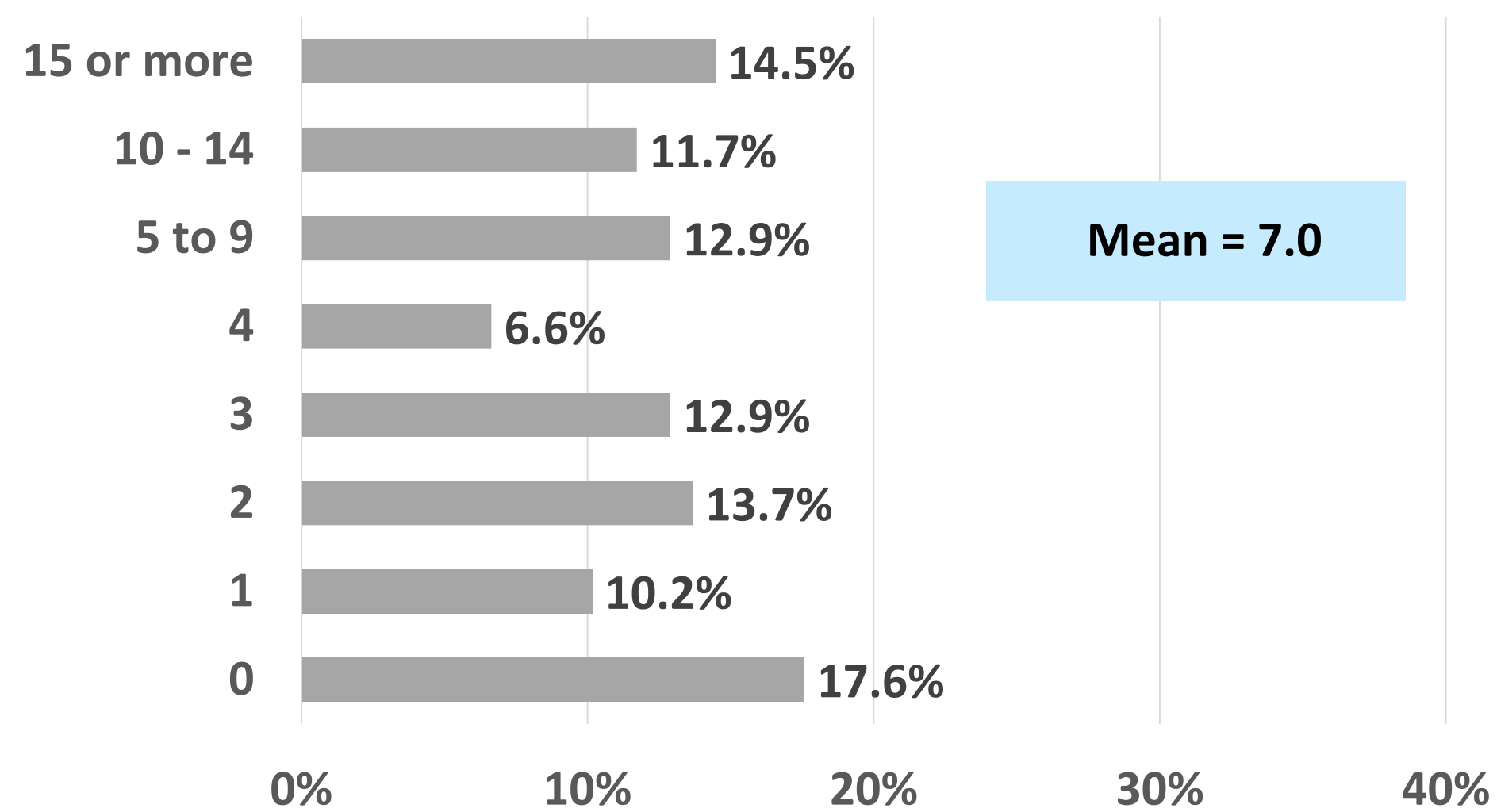
Question: How familiar are you with Convention & Visitors Bureaus (also known as CVBs and Destination Marketing Organizations/DMOs)? (Select one)

Base: All respondents. 256 completed surveys.

# Number of CVBs Contacted in Past Twelve Months

More than one-quarter of meeting planners who have not previously planned a meeting in Monterey County reported not contacting any CVBs for assistance in planning their meetings or events in the past twelve months (27.4%). Meeting planners contacted an average of 7.0 different CVBs for assistance in the past twelve months with Heavy Users reporting an average of 9.6 CVBs contacted.

Chart 13: Number of CVBs Contacted in the Past Twelve Months



Detail by Past Experience in Monterey County

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
15 or more	14.5%	19.0%	21.7%	12.5%	8.0%
10 - 14	11.7%	21.4%	11.6%	12.5%	8.0%
5 to 9	12.9%	11.9%	13.0%	16.7%	12.4%
4	6.6%	4.8%	11.6%	4.2%	3.5%
3	12.9%	16.7%	14.5%	8.3%	12.4%
2	13.7%	7.1%	13.0%	25.0%	15.0%
1	10.2%	11.9%	2.9%	12.5%	13.3%
0	17.6%	7.1%	11.6%	8.3%	27.4%
Mean	7.0	9.6	8.6	8.1	4.6
Base	256	42	69	24	113

Question: How many different CVBs have you contacted for any assistance planning your meetings or events in the PAST 12 MONTHS?

Base: All respondents. 256 completed surveys.

# Number of CVBs Contacted in Past Twelve Months (continued)

**Association, Government, Sports and Incentive meeting planners reported the highest number of CVBs contacted in the past twelve months.**

Meeting planners that plan for Corporate and SMERF groups reported the lowest averages for contacting CVBs for assistance.

## Detail by Type of Planner

	Total	Corporate— Private sector businesses	Association	SMERF	Government	Non-profit— Charity	Sports groups or sporting organizations	Incentive
<b>15 or more</b>	14.5%	20.8%	24.8%	18.8%	25.7%	25.6%	31.3%	38.5%
<b>10 - 14</b>	11.7%	10.4%	18.6%	12.5%	14.3%	7.0%	25.0%	7.7%
<b>5 to 9</b>	12.9%	11.8%	15.9%	10.4%	11.4%	9.3%	12.5%	15.4%
<b>4</b>	6.6%	4.9%	4.4%	8.3%	8.6%	0.0%	0.0%	10.3%
<b>3</b>	12.9%	7.6%	13.3%	0.0%	17.1%	14.0%	6.3%	5.1%
<b>2</b>	13.7%	13.9%	7.1%	10.4%	5.7%	11.6%	6.3%	2.6%
<b>1</b>	10.2%	9.7%	8.0%	20.8%	8.6%	20.9%	0.0%	10.3%
<b>0</b>	17.6%	20.8%	8.0%	18.8%	8.6%	11.6%	18.8%	10.3%
<b>Mean</b>	<b>7.0</b>	<b>8.4</b>	<b>10.7</b>	<b>7.2</b>	<b>11.6</b>	<b>9.7</b>	<b>11.8</b>	<b>13.4</b>
<b>Base</b>	<b>256</b>	<b>144</b>	<b>113</b>	<b>48</b>	<b>35</b>	<b>43</b>	<b>16</b>	<b>39</b>

Question: How many different CVBs have you contacted for any assistance planning your meetings or events in the PAST 12 MONTHS?

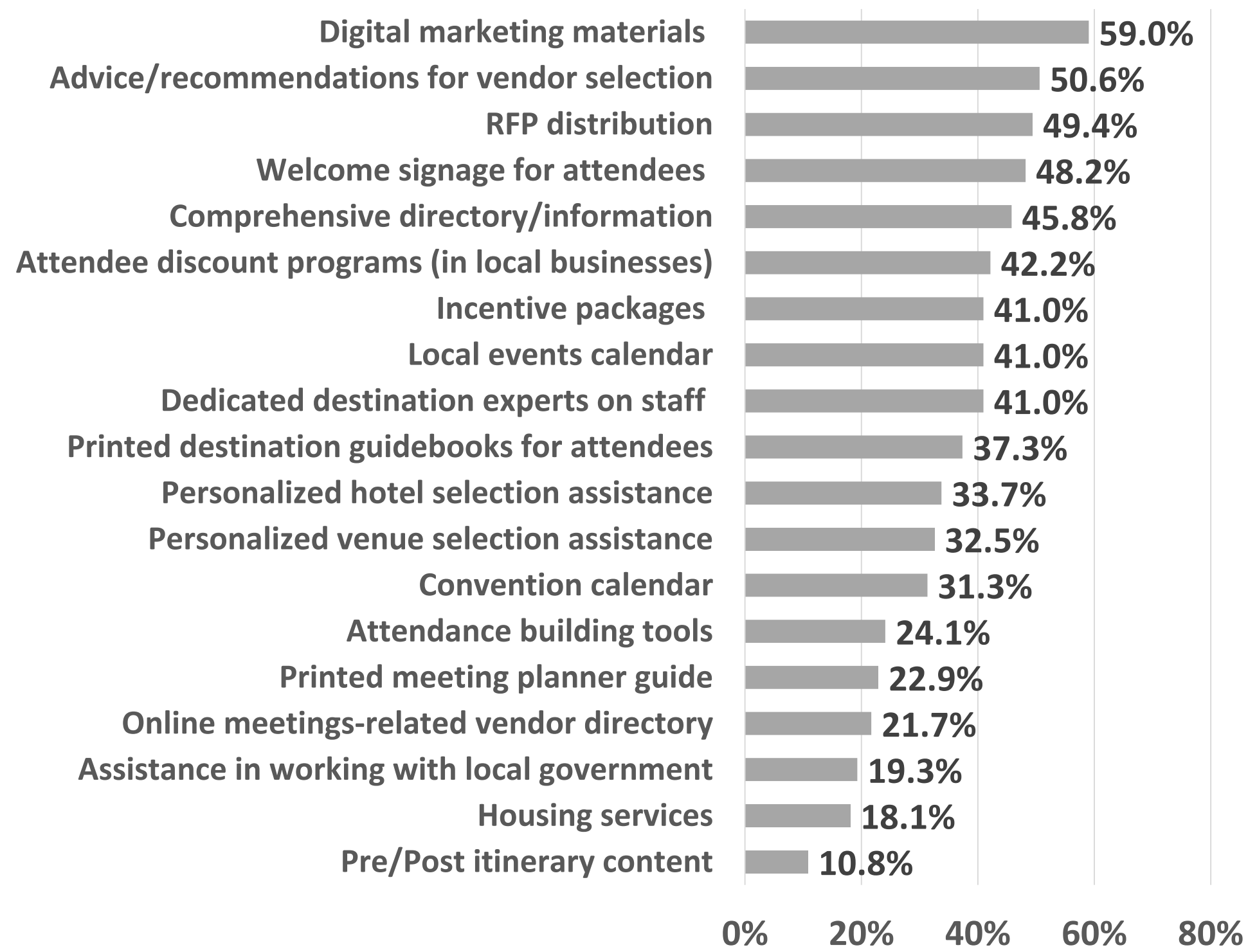
Base: All respondents. 256 completed surveys.

# Likeliest CVB Services Meeting Planners Would Use: Large vs. Small Meetings

For both large and small meetings, meeting planners would be likely to utilize CVB services for advice and recommendations for vendor selection and RFP distribution.

The top CVB services meeting planners planning large meetings would be most likely to use are digital marketing materials (59.0%), advice on vendor selection (50.6%), RFP distribution (49.4%) and welcome signage for attendees (48.2%). For smaller meetings, the largest proportions of meeting planners reported that they would be likely to utilize a local events calendar (47.6%), RFP distribution (40.0%), advice for vendor selection (35.7%) and personalized hotel selection assistance (35.1%).

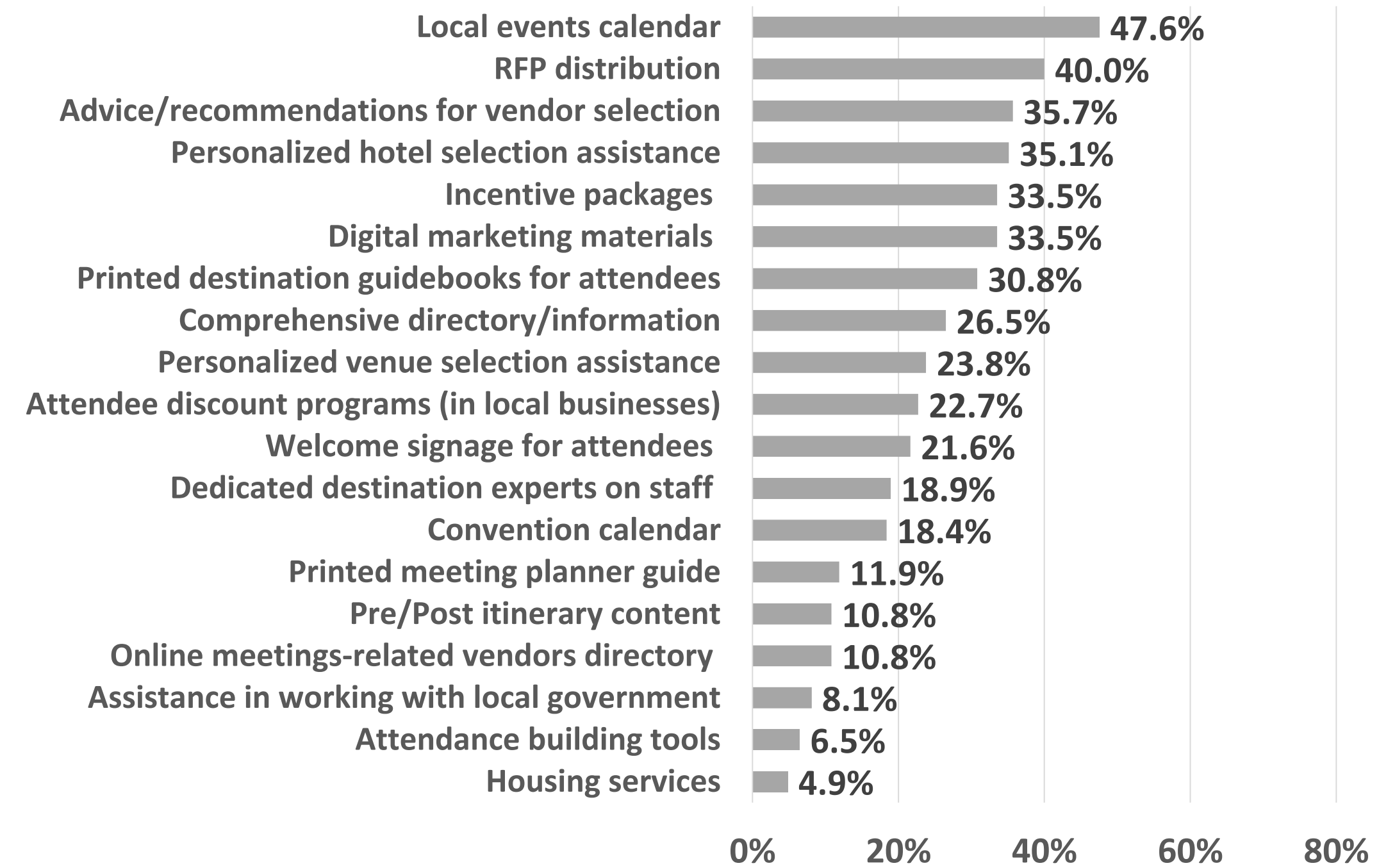
**Chart 14: Large Meetings--CVB Services Likely to Use**



Question: Imagine you are planning a meeting with 500 peak room nights. Which of the following services provided by a Convention & Visitors Bureau would you be likely to use? (Select all that apply)

Base: All respondents. 83 completed surveys.

**Chart 15: Small Meetings--CVB Services Likely to Use**



Question: Imagine you are planning a meeting with 50 peak room nights. Which of the following services provided by a Convention & Visitors Bureau would you be likely to use? (Select all that apply)

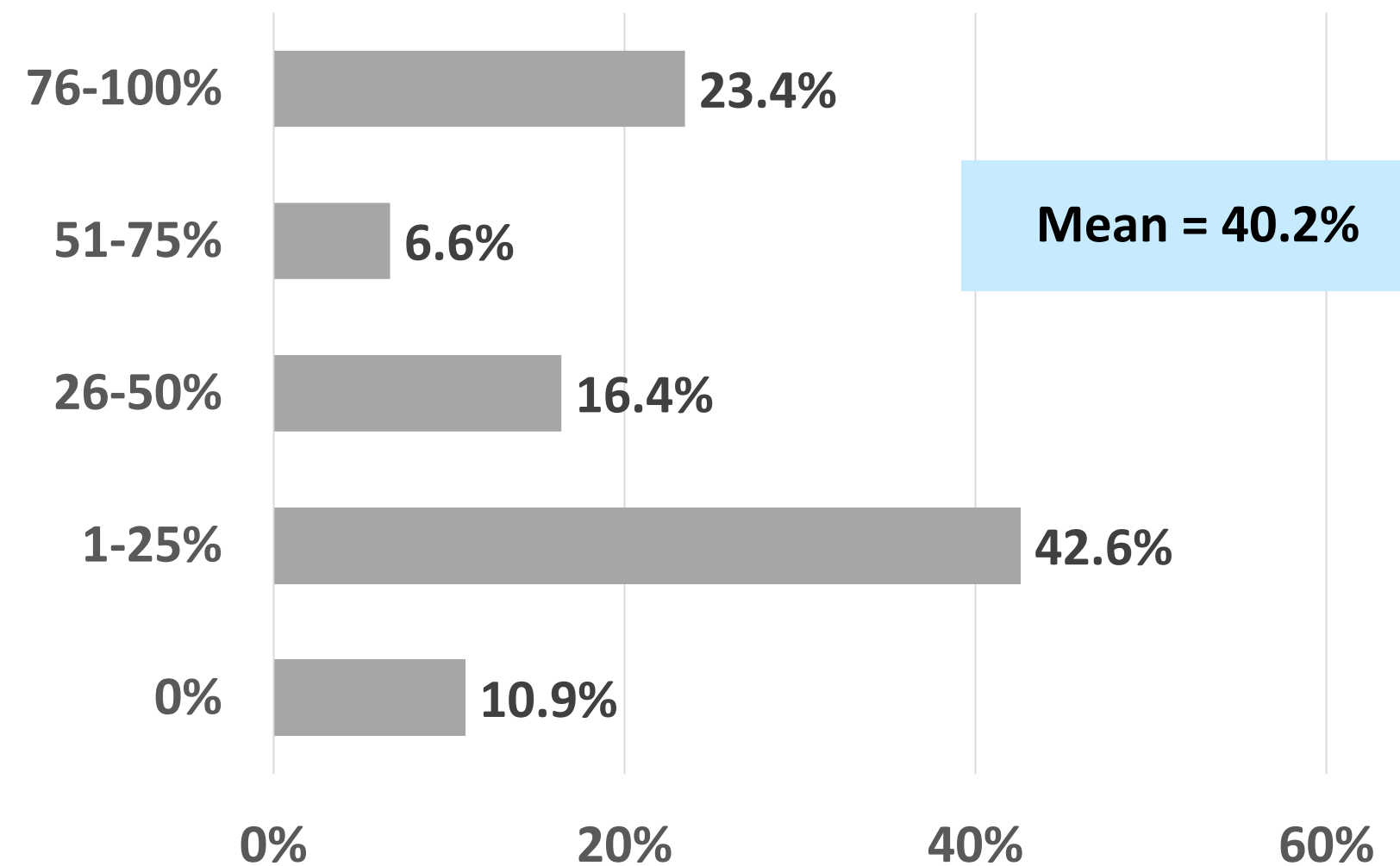
Base: All respondents. 185 completed surveys.

THE MONTEREY COUNTY MEETINGS  
DESTINATION BRAND  
– COMPETITIVE SITUATION

# California Considered in Destination Set (Next Two Years)

Amongst meeting planners surveyed, one or more destinations in California will be considered for approximately 40 percent of meetings that they will likely select a destination for in the next two years (40.2%). However, one-in-five planners who have never used Monterey County will not consider any California destinations in the next two years (21.2%). Of Infrequent Users, one-quarter reported that they will consider at least one California destination for 76-100% of meetings that they will likely plan in the next two years (25.0%). This highlights an opportunity to influence more infrequent users in considering California destinations for more future meetings.

**Chart 16: California Considered in Destination Set (Next Two Years)**



**Detail by Past Experience in Monterey County**

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
76-100%	23.4%	50.0%	37.7%	25.0%	6.2%
51-75%	6.6%	9.5%	7.2%	4.2%	5.3%
26-50%	16.4%	21.4%	13.0%	12.5%	16.8%
1-25%	42.6%	16.7%	40.6%	54.2%	50.4%
0%	10.9%	2.4%	1.4%	4.2%	21.2%
<b>Mean</b>	<b>40.2%</b>	<b>66.0%</b>	<b>53.3%</b>	<b>42.7%</b>	<b>23.2%</b>
<b>Base</b>	<b>256</b>	<b>42</b>	<b>69</b>	<b>24</b>	<b>113</b>

Question: Please think about the meetings you will likely select a city/destination/site for over the next two years. Approximately what percent of these meetings will you consider one or more destinations in California for?

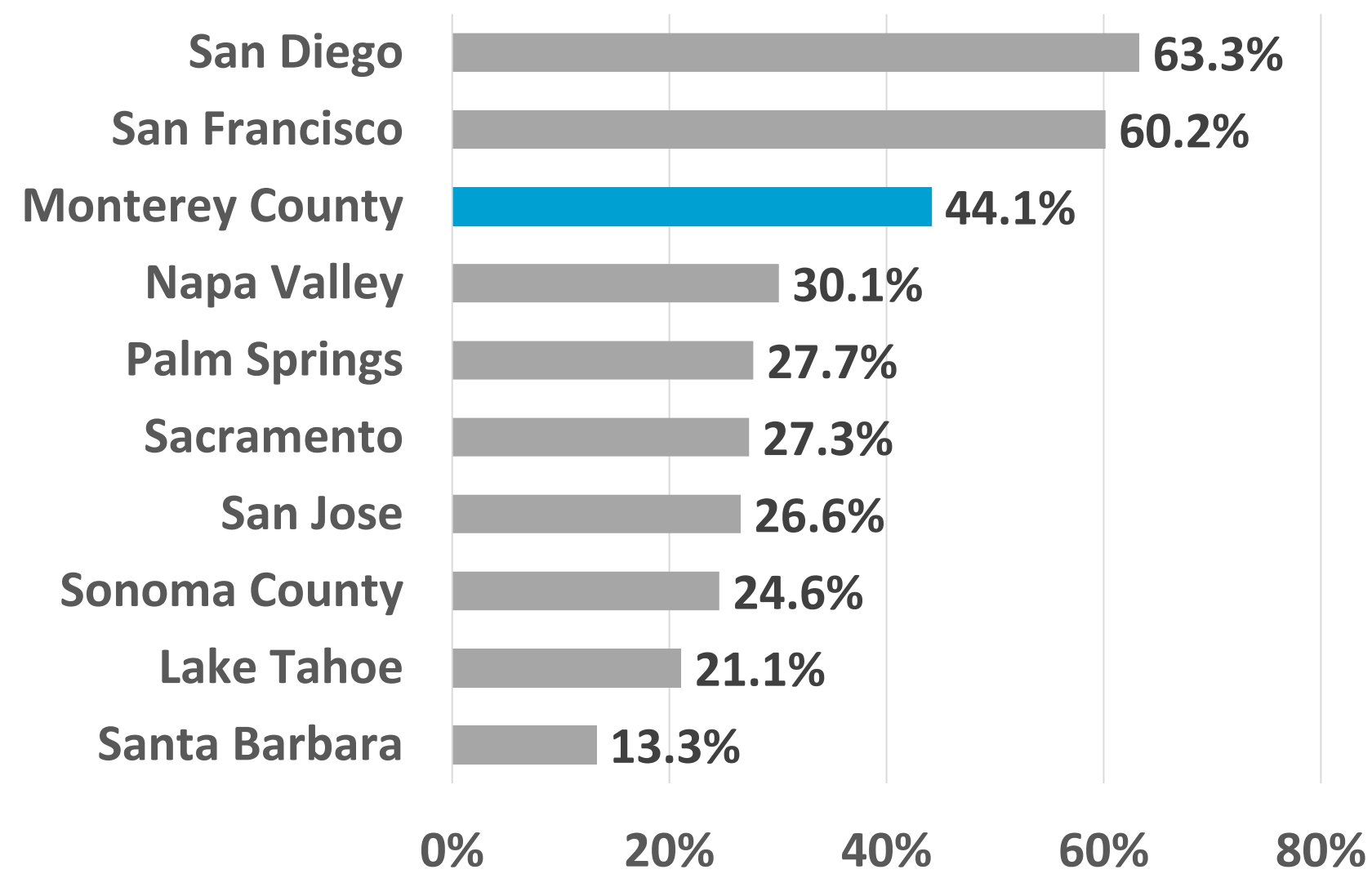
Base: All respondents. 256 completed surveys.



# Competitive Set - Meeting Destinations in Past Five Years (open-ended)

**San Diego and San Francisco appear to be Monterey County’s top competitors for meetings and events.** In a series of questions about Monterey County and despite the fact that over four-in-ten meeting planners surveyed used Monterey County in the past five years (44.1%), San Diego and San Francisco were far more commonly used by these planners. About 60 percent or more of all meeting planners surveyed planned a meeting or event in San Diego (63.3%) and/or San Francisco (60.2%) in the past five years. Higher percentages, of approximately 70 percent or more, of heavy Monterey County users also used San Diego (71.4%) and/or San Francisco (78.6%). Amongst meeting planners who have never used Monterey County, San Diego (58.4%) and San Francisco (53.1%) were also the most commonly used cities in the past five years, followed by the Northern California destinations of Napa Valley (17.7%) and San Jose (16.8%).

**Chart 17: Meeting Destinations in Past Five Years**



**Detail by Past Experience in Monterey County**

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
San Diego	63.3%	71.4%	63.8%	62.5%	58.4%
San Francisco	60.2%	78.6%	55.1%	75.0%	53.1%
Monterey County	44.1%	100.0%	85.5%	37.5%	0.0%
Napa Valley	30.1%	54.8%	31.9%	41.7%	17.7%
Palm Springs	27.7%	45.2%	33.3%	41.7%	15.0%
Sacramento	27.3%	45.2%	42.0%	25.0%	11.5%
San Jose	26.6%	52.4%	27.5%	25.0%	16.8%
Sonoma County	24.6%	45.2%	31.9%	29.2%	11.5%
Lake Tahoe	21.1%	33.3%	31.9%	25.0%	8.8%
Santa Barbara	13.3%	31.0%	15.9%	12.5%	4.4%
Base	256	42	69	24	113

Question: In the PAST FIVE (5) YEARS, in which of these destinations have you planned a meeting or event? (Select all that apply)

Base: All respondents. 256 completed surveys.

# Competitive Set - Meeting Destinations in Past Five Years (open-ended) (continued)

## Detail by Type of Industry

	Total	Software /Technology	Agriculture	Education	Financial	Insurance	Manufact-uring	Medical	Pharmac-eutical	Telecomm-unications	Advertising/Marketing	Retail	Other
San Diego	63.3%	70.5%	71.9%	71.8%	71.8%	80.0%	72.1%	71.1%	65.1%	75.8%	60.7%	81.0%	67.1%
San Francisco	60.2%	79.5%	65.6%	55.3%	71.8%	80.0%	72.1%	65.8%	76.7%	78.8%	60.7%	76.2%	46.8%
Monterey County	44.1%	43.2%	56.3%	36.9%	40.8%	45.7%	37.2%	42.1%	34.9%	30.3%	35.7%	38.1%	55.7%
Napa Valley	30.1%	40.9%	31.3%	33.0%	46.5%	51.4%	30.2%	31.6%	37.2%	24.2%	39.3%	52.4%	30.4%
Palm Springs	27.7%	30.7%	25.0%	29.1%	35.2%	42.9%	30.2%	40.8%	37.2%	27.3%	25.0%	47.6%	30.4%
Sacramento	27.3%	26.1%	28.1%	37.9%	23.9%	31.4%	20.9%	26.3%	23.3%	30.3%	25.0%	38.1%	40.5%
San Jose	26.6%	46.6%	34.4%	31.1%	32.4%	34.3%	20.9%	28.9%	34.9%	27.3%	28.6%	47.6%	30.4%
Sonoma County	24.6%	33.0%	25.0%	24.3%	32.4%	40.0%	25.6%	23.7%	34.9%	21.2%	28.6%	42.9%	22.8%
Lake Tahoe	21.1%	21.6%	31.3%	28.2%	26.8%	34.3%	23.3%	30.3%	20.9%	21.2%	21.4%	28.6%	22.8%
Santa Barbara	13.3%	15.9%	28.1%	16.5%	18.3%	20.0%	11.6%	13.2%	14.0%	21.2%	21.4%	28.6%	15.2%
Base	256	42	69	24	113	256	42	69	24	113	256	42	69

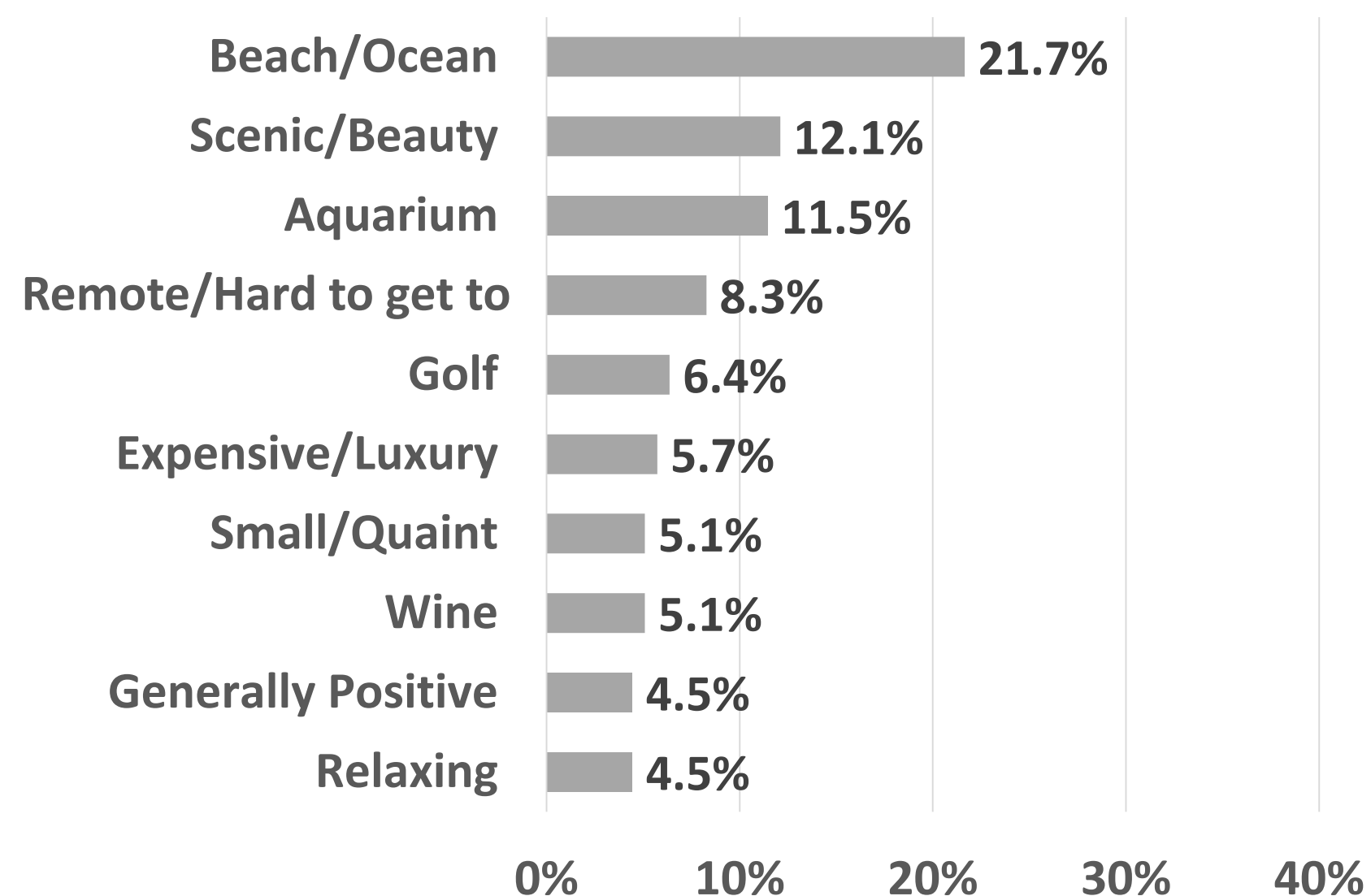
Question: In the PAST FIVE (5) YEARS, in which of these destinations have you planned a meeting or event? (Select all that apply)

Base: All respondents. 256 completed surveys.

# Top Description as a Meetings Destination (open-ended)

Of the competitive destination set tested in this research a top word emerged as the first description that came to mind for all destinations except Monterey and Santa Barbara. The largest proportion of meeting planners described San Francisco as “expensive”, San Diego and Palm Springs as “good weather/sunny”, Napa and Sonoma as “wine”, Lake Tahoe as “snow/winter activities”, Sacramento as “capitol” and San Jose as “tech industry”. Twenty percent of meeting planners said the first word that came to mind for Monterey County was “beach/ocean”, while another one-in-ten wrote in “scenic/beauty” and “aquarium.” The top single words for Santa Barbara were “beach/ocean” and “expensive/luxury.”

**Chart 18: Top Description of Monterey as a Meetings Destination**



**Detail by Past Experience in Monterey County**

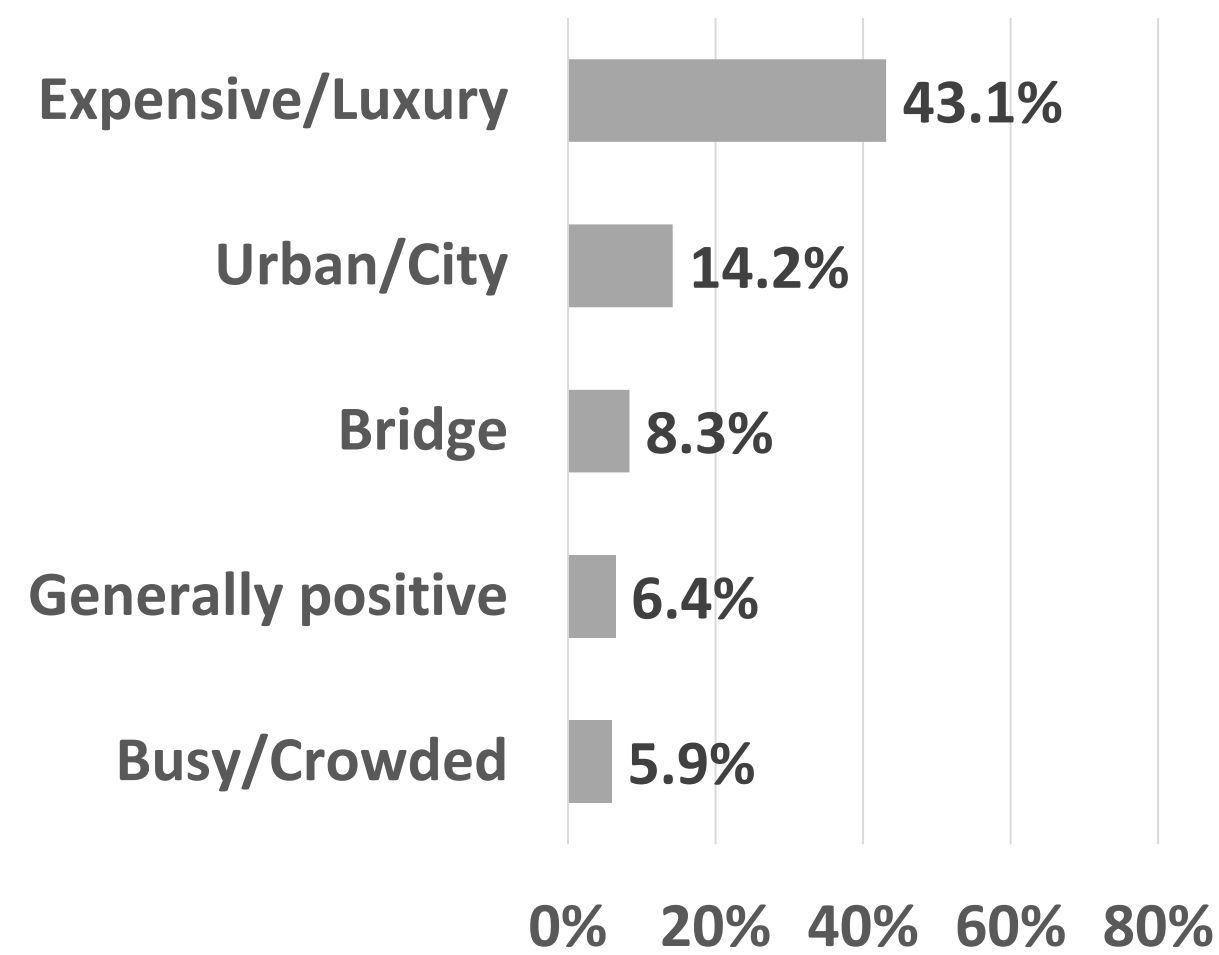
	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
Beach/Ocean	21.7%	26.1%	24.0%	13.3%	22.2%
Scenic/Beauty	12.1%	13.0%	14.0%	6.7%	12.7%
Aquarium	11.5%	17.4%	16.0%	13.3%	6.3%
Remote/Hard to get to	8.3%	0.0%	6.0%	20.0%	9.5%
Golf	6.4%	0.0%	6.0%	20.0%	4.8%
Expensive/Luxury	5.7%	0.0%	4.0%	0.0%	9.5%
Small/Quaint	5.1%	0.0%	4.0%	0.0%	9.5%
Wine	5.1%	0.0%	4.0%	0.0%	7.9%
Generally Positive	4.5%	13.0%	6.0%	0.0%	1.6%
Relaxing	4.5%	4.3%	4.0%	20.0%	1.6%
<b>Base</b>	<b>157</b>	<b>23</b>	<b>50</b>	<b>15</b>	<b>63</b>

Question: Think of the destinations listed below as sites for meetings and events. For each listed, please write the first word, phrase or description that comes to mind when you think of this destination as a place for meetings and events. Even if you are unfamiliar with a destination, please answer based on your current impression.

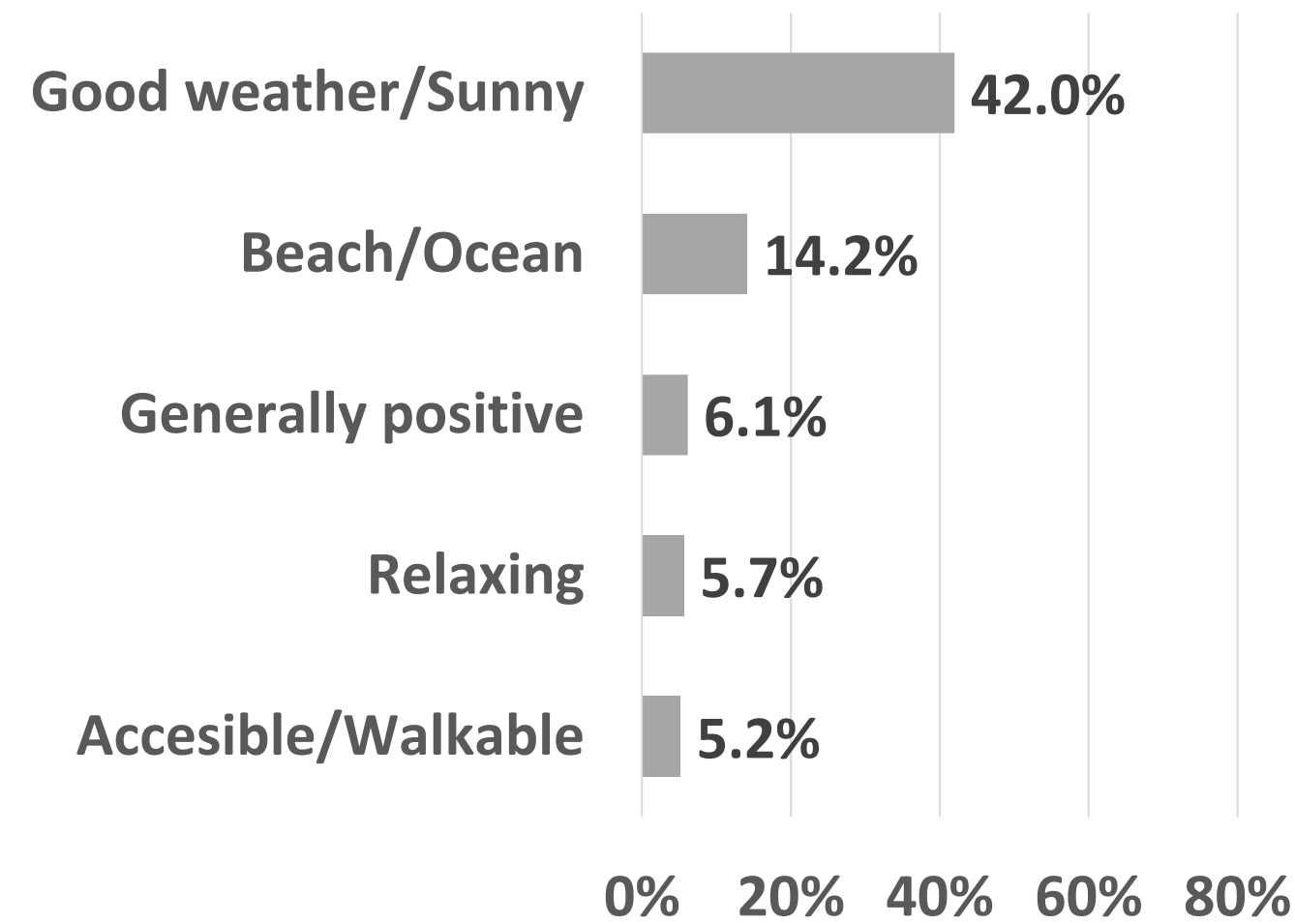
Base. All respondents. 256 completed surveys.

# Top Description as a Meetings Destination (open-ended) (continued)

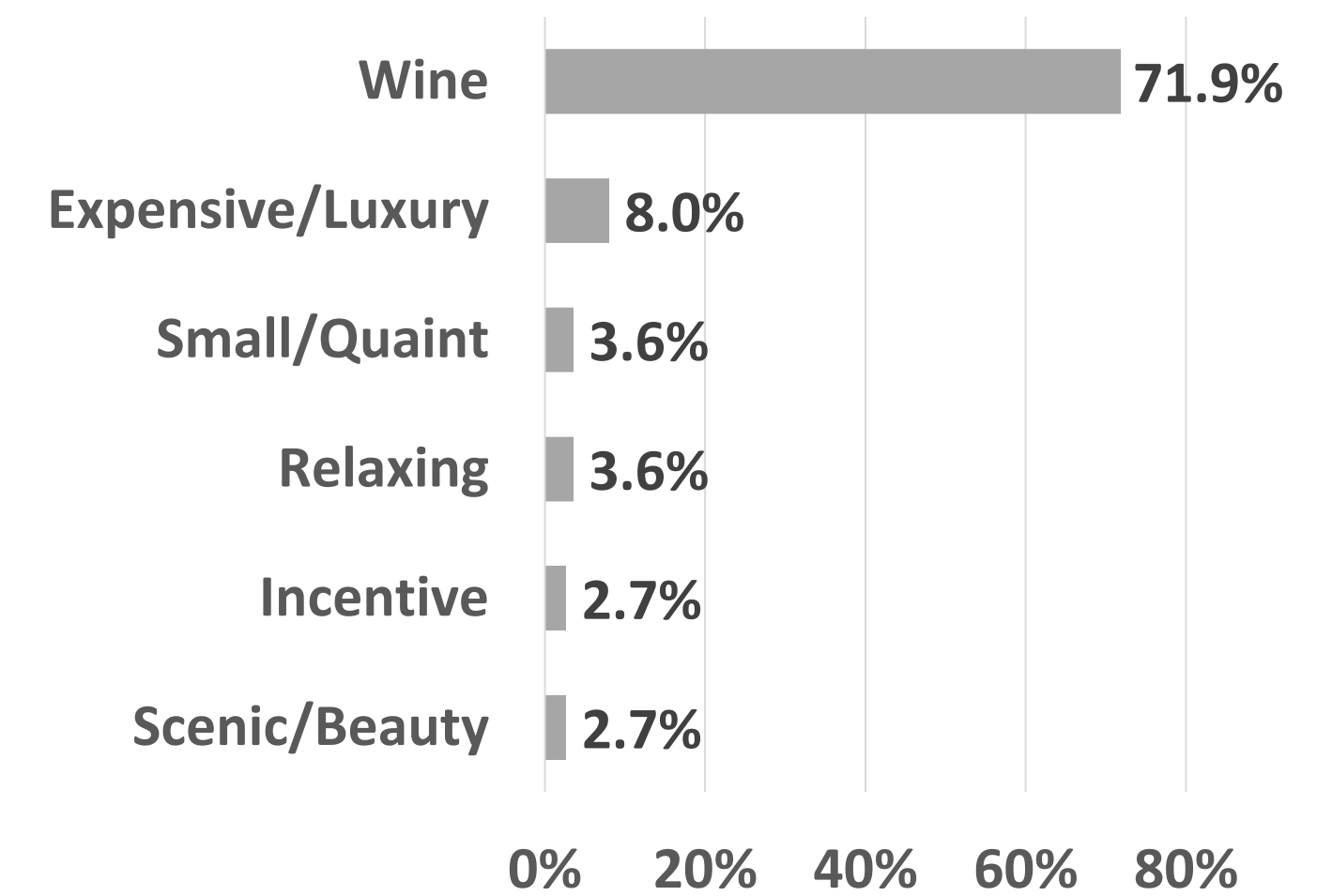
**Chart 19: Top Description of San Francisco as a Meetings Destination**



**Chart 20: Top Description of San Diego as a Meetings Destination**



**Chart 21: Top Description of Napa Valley as a Meetings Destination**

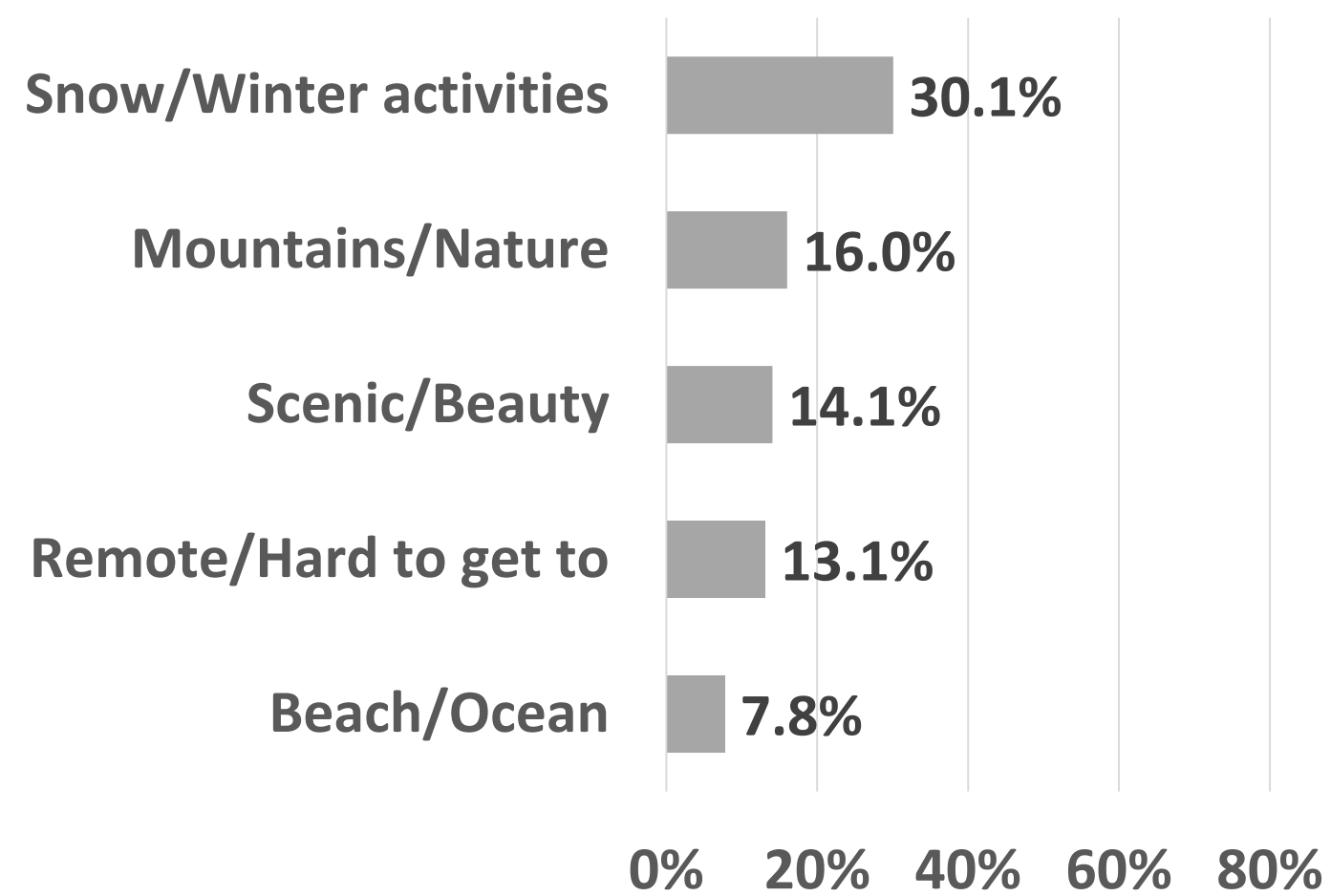


Question: Think of the destinations listed below as sites for meetings and events. For each listed, then write the first word, phrase or description that comes to mind when you think of this destination as a place for meetings and events. Even if you are unfamiliar with a destination, please answer based on your current impression.

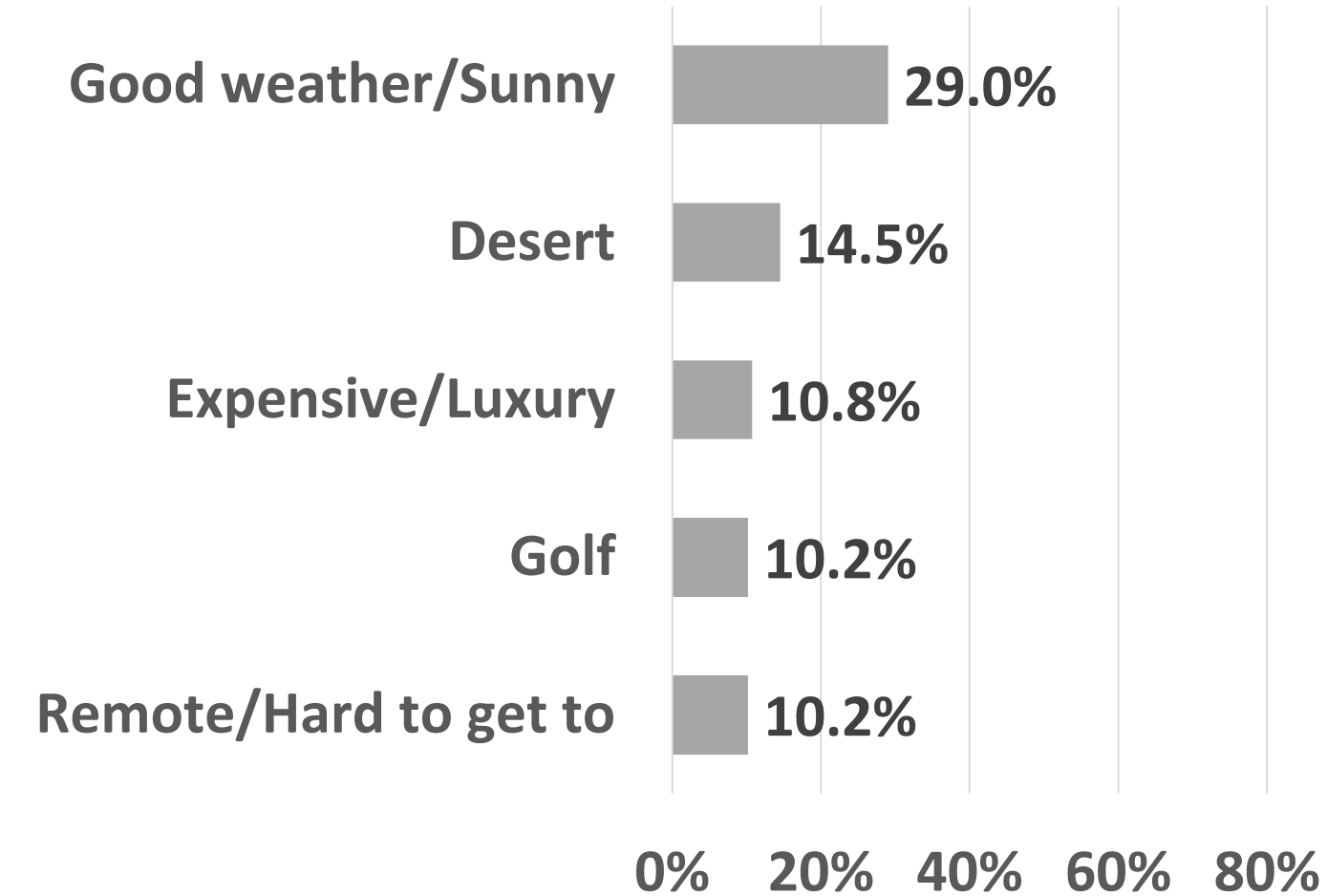
Base. All respondents. 256 completed surveys.

# Top Description as a Meetings Destination (open-ended) (continued)

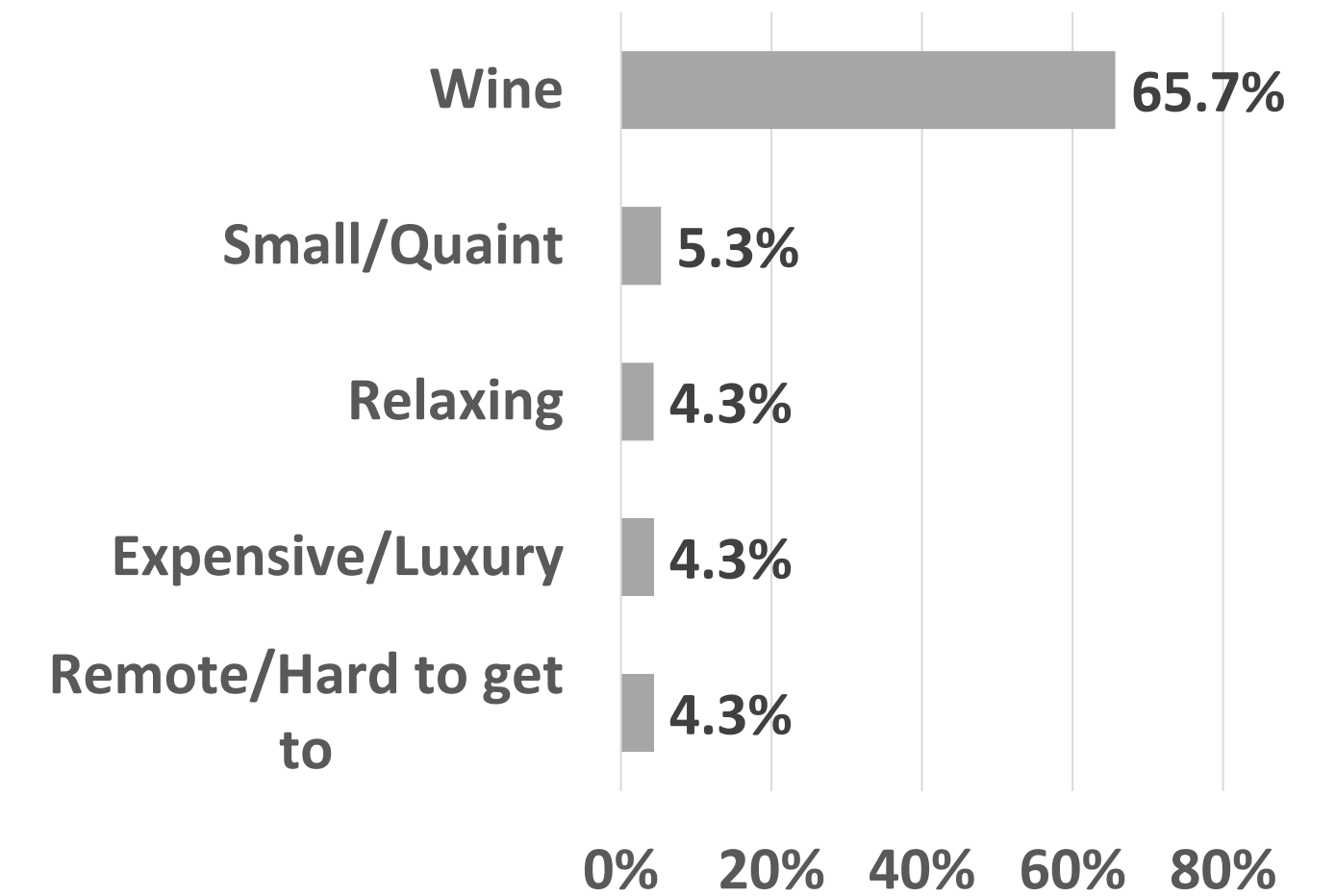
**Chart 22: Top Description of Lake Tahoe as a Meetings Destination**



**Chart 23: Top Description of Palm Springs as a Meetings Destination**



**Chart 24: Top Description of Sonoma County as a Meetings Destination**

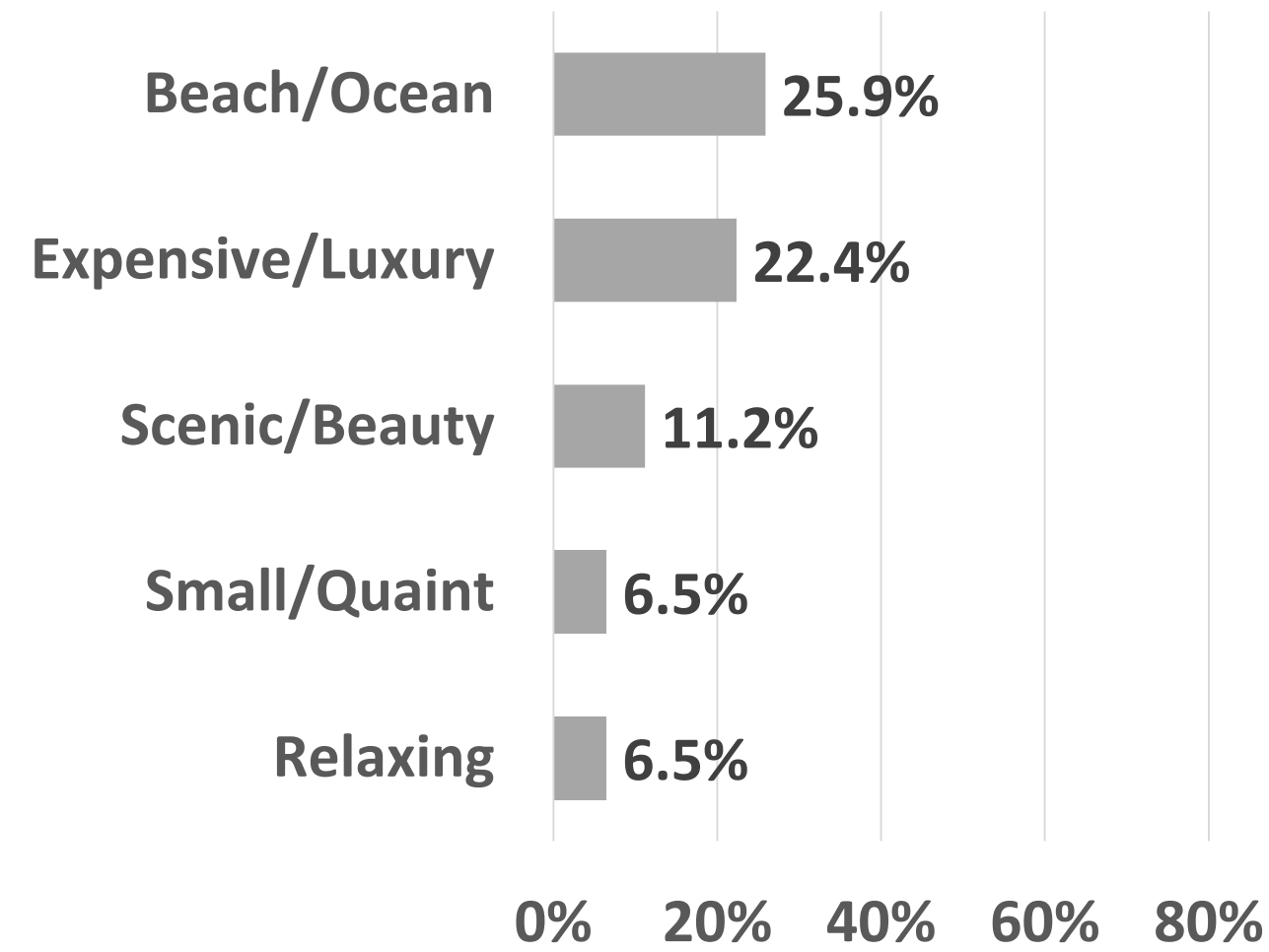


Question: Think of the destinations listed below as sites for meetings and events. For each listed, then write the first word, phrase or description that comes to mind when you think of this destination as a place for meetings and events. Even if you are unfamiliar with a destination, please answer based on your current impression.

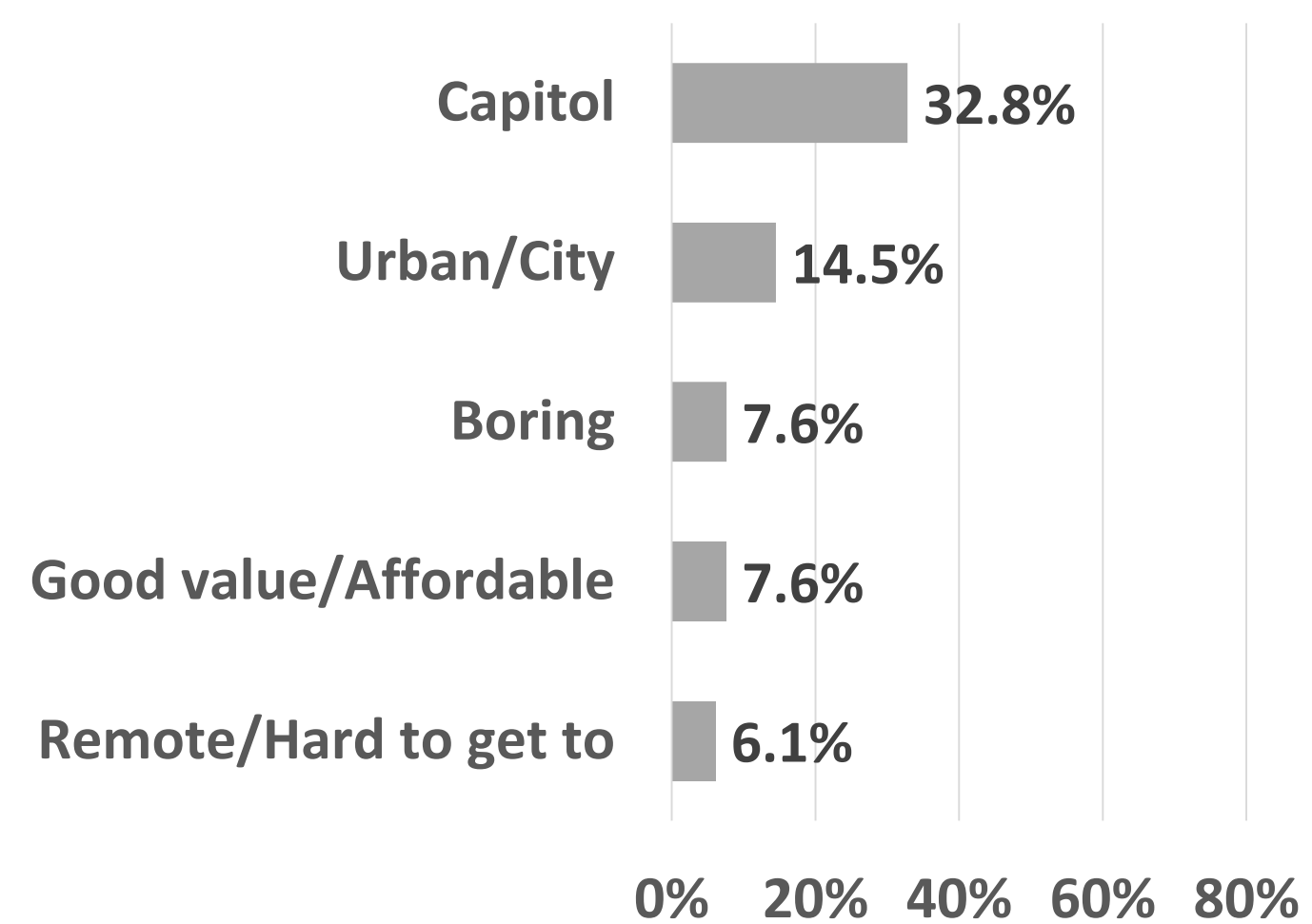
Base. All respondents. 256 completed surveys.

# Top Description as a Meetings Destination (open-ended) (continued)

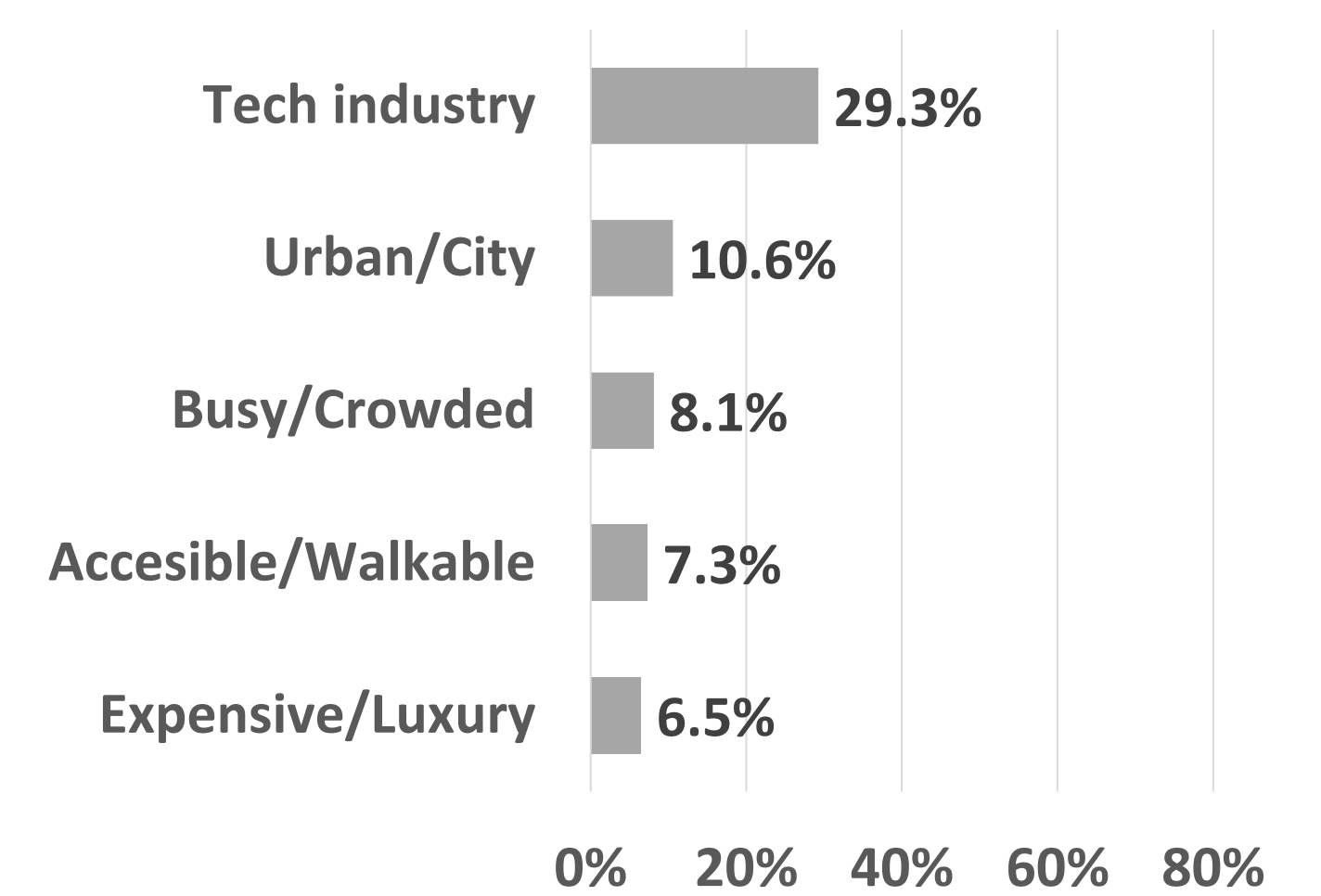
**Chart 25: Top Description of Santa Barbara as a Meetings Destination**



**Chart 26: Top Description of Sacramento as a Meetings Destination**



**Chart 27: Top Description of San Jose as a Meetings Destination**



Question: Think of the destinations listed below as sites for meetings and events. For each listed, then write the first word, phrase or description that comes to mind when you think of this destination as a place for meetings and events. Even if you are unfamiliar with a destination, please answer based on your current impression.

Base. All respondents. 256 completed surveys.

# Competitive Set – Popularity of Destination with Attendees

**Monterey County is outpaced by San Diego, San Francisco and Napa Valley in terms of meeting planners’ perceived destination popularity with attendees.** While 55.1 percent of meeting planners surveyed reported Monterey County as having “High popularity” or “Extremely high popularity,” San Diego (80.1%), San Francisco (69.5%) and Napa Valley (61.3%) each received a top-two box score of 60 percent or more. Amongst user segments, Heavy Users gave Monterey County the highest top-two box score for its perceived popularity with attendees (90.5%). Those who have never used Monterey County had a smaller proportion who rated Monterey County as having “High popularity” or “Extremely high popularity” (25.7%).

## Total Answering

	Top Two Box Score	Mean Score
San Diego	80.1%	4.3
San Francisco	69.5%	4.0
Napa Valley	61.3%	3.8
Monterey County	55.1%	3.6
Palm Springs	48.0%	3.4
Sonoma County	46.5%	3.5
Lake Tahoe	43.0%	3.3
Santa Barbara	32.4%	3.2
San Jose	18.0%	2.8
Sacramento	11.7%	2.5

## Detail by Past Experience in Monterey County—TOP TWO BOX SCORE (Extremely high popularity & High popularity)

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
San Diego	80.1%	81.0%	85.5%	70.8%	77.9%
San Francisco	69.5%	64.3%	71.0%	66.7%	70.8%
Napa Valley	61.3%	64.3%	59.4%	75.0%	59.3%
Monterey County	55.1%	90.5%	82.6%	58.3%	25.7%
Palm Springs	48.0%	45.2%	56.5%	62.5%	42.5%
Sonoma County	46.5%	57.1%	43.5%	62.5%	40.7%
Lake Tahoe	43.0%	35.7%	49.3%	50.0%	40.7%
Santa Barbara	32.4%	42.9%	31.9%	37.5%	29.2%
San Jose	18.0%	16.7%	21.7%	8.3%	18.6%
Sacramento	11.7%	9.5%	20.3%	4.2%	8.8%
Base	256	42	69	24	113

Question: In the next questions that follow, please: Think of the destinations listed as sites for the types of meetings you most typically plan. Answer the questions based on your current knowledge and impression of each destination, even if you have never planned a meeting there. Now rate each destination for each attribute following using the 5-point scales provided: Popularity with attendees.

Base: All respondents. 256 completed surveys.

# Competitive Set – Likelihood of Having a Successful Meeting

Of the ten California destinations tested, San Diego is viewed by meeting planners to have the highest likelihood of hosting a meeting that fulfills their definition of success.

Using a five-point scale from “Extremely unlikely” to “Extremely likely,” the majority of meeting planners reported that San Diego was “Likely” or “Extremely likely” to host a successful meeting (80.1%), resulting in a mean score of 4.3 out of 5. While San Francisco received a slightly higher top-two box score than Monterey County (65.6% vs. 63.3%), San Francisco and Monterey County received the same mean score of 3.9. Amongst user segments, meeting planners who have previously held a meeting in Monterey County gave it top-two box score of more than 80 percent, while those who have never used gave it the relatively lowest top-two box score (39.8%).

## Total Answering

	Top Two Box Score	Mean Score
San Diego	80.1%	4.3
San Francisco	65.6%	3.9
Monterey County	63.3%	3.9
Napa Valley	58.2%	3.7
Palm Springs	55.5%	3.6
Sonoma County	49.6%	3.5
Lake Tahoe	48.8%	3.4
Santa Barbara	42.2%	3.3
Sacramento	34.4%	3.1
San Jose	34.0%	3.1

## Detail by Past Experience in Monterey County—TOP TWO BOX SCORE (Extremely likely & Likely)

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
San Diego	80.1%	78.6%	84.1%	91.7%	76.1%
San Francisco	65.6%	61.9%	71.0%	58.3%	65.5%
Monterey County	63.3%	85.7%	81.2%	87.5%	39.8%
Napa Valley	58.2%	81.0%	55.1%	70.8%	51.3%
Palm Springs	55.5%	59.5%	58.0%	70.8%	50.4%
Sonoma County	49.6%	69.0%	53.6%	54.2%	40.7%
Lake Tahoe	48.8%	50.0%	53.6%	58.3%	44.2%
Santa Barbara	42.2%	54.8%	43.5%	54.2%	34.5%
Sacramento	34.4%	45.2%	44.9%	29.2%	24.8%
San Jose	34.0%	45.2%	34.8%	20.8%	33.6%
Base	256	42	69	24	113

Question: In the next question that follow, please: Think of the destinations listed as sites for the types of meetings you most typically plan. Answer the questions based on your current knowledge and impression of each destination, even if you have never planned a meeting there. Now rate each destination for each attribute following using the 5-point scales provided: Likelihood of having a meeting that meets your definition of success.

Base: All respondents. 256 completed surveys.



# Competitive Set – Overall Ease of Holding a Meeting

**San Diego and San Francisco outrank Monterey County regarding meeting planners’ ratings for the overall ease of holding a meeting in the destination.** While nearly half of meeting planners surveyed gave Monterey County a top-two box score of “Easy” or “Extremely easy” in terms of overall ease of hosting a meeting (47.7%), San Diego (69.1%) and San Francisco (57.0%) received higher top-two box scores. Two-thirds of Heavy and Moderate Users reported that Monterey County’s overall ease of having a meeting was either “Easy” or “Extremely Easy” (76.2% and 75.4%, respectively). Meanwhile, half of Infrequent or Historic Users gave Monterey County a top-two box score for overall ease of holding a meeting (50.0%). One-in-five of those who have never used Monterey County consider it to be “Easy” or “Extremely easy” for holding a meeting (21.2%).

## Total Answering

	Top Two Box Score	Mean Score
San Diego	69.1%	4.1
San Francisco	57.0%	3.7
Monterey County	47.7%	3.5
Palm Springs	41.0%	3.4
Napa Valley	37.9%	3.3
Sacramento	37.9%	3.5
San Jose	36.7%	3.4
Sonoma County	35.2%	3.3
Lake Tahoe	30.9%	3.2
Santa Barbara	22.3%	3.1

## Detail by Past Experience in Monterey County—TOP TWO BOX SCORE (Extremely easy & Easy)

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
San Diego	69.1%	81.0%	71.0%	83.3%	60.2%
San Francisco	57.0%	54.8%	59.4%	50.0%	57.5%
Monterey County	47.7%	76.2%	75.4%	50.0%	21.2%
Palm Springs	41.0%	38.1%	56.5%	50.0%	30.1%
Napa Valley	37.9%	45.2%	49.3%	45.8%	28.3%
Sacramento	37.9%	38.1%	56.5%	45.8%	25.7%
San Jose	36.7%	47.6%	49.3%	37.5%	25.7%
Sonoma County	35.2%	40.5%	50.7%	50.0%	21.2%
Lake Tahoe	30.9%	28.6%	46.4%	45.8%	19.5%
Santa Barbara	22.3%	26.2%	26.1%	25.0%	17.7%
Base	256	42	69	24	113

Question: In the next question that follow, please: Think of the destinations listed as sites for the types of meetings you most typically plan. Answer the questions based on your current knowledge and impression of each destination, even if you have never planned a meeting there. Now rate each destination for each attribute following using the 5-point scales provided: Overall ease of holding a meeting in the destination.

Base: All respondents. 256 completed surveys.

# Competitive Set – Familiarity with the Destination’s Meetings Product

**Monterey County is behind by San Diego and San Francisco in terms of personal familiarity with the destination as a meetings site.** Approximately three-quarters or more of meeting planners surveyed consider themselves personally “Familiar” or “Very familiar” with San Diego (81.6%) and San Francisco (73.0%) as a meetings destination. This level of familiarity with Monterey County was reported by 54.7 percent of all meeting planners surveyed. The destination received a top-two box score of over ninety percent by Heavy Users (92.9%), eighty percent of Moderate Users (81.2%) and two-thirds of Infrequent or Historic Users (75.0%). Those who have never used Monterey County stated the relatively lowest top-two box score regarding personal familiarity with Monterey County as a meetings destination (20.4%).

## Total Answering

	Top Two Box Score	Mean Score
San Diego	81.6%	4.1
San Francisco	73.0%	3.9
Monterey County	54.7%	3.4
Napa Valley	50.0%	3.4
Palm Springs	47.3%	3.3
Lake Tahoe	44.1%	3.2
San Jose	39.8%	3.1
Sonoma County	38.7%	3.1
Sacramento	36.3%	3.0
Santa Barbara	34.0%	2.9

## Detail by Past Experience in Monterey County—TOP TWO BOX SCORE (Very familiar & Familiar)

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
San Diego	81.6%	88.1%	85.5%	91.7%	74.3%
San Francisco	73.0%	85.7%	76.8%	75.0%	65.5%
Monterey County	54.7%	92.9%	81.2%	75.0%	20.4%
Napa Valley	50.0%	69.0%	59.4%	54.2%	36.3%
Palm Springs	47.3%	64.3%	62.3%	66.7%	28.3%
Lake Tahoe	44.1%	52.4%	65.2%	45.8%	27.4%
San Jose	39.8%	64.3%	43.5%	41.7%	27.4%
Sonoma County	38.7%	54.8%	49.3%	50.0%	23.0%
Sacramento	36.3%	47.6%	53.6%	41.7%	19.5%
Santa Barbara	34.0%	59.5%	44.9%	29.2%	20.4%
Base	256	42	69	24	113

Question: In the next question that follow, please: Think of the destinations listed as sites for the types of meetings you most typically plan. Answer the questions based on your current knowledge and impression of each destination, even if you have never planned a meeting there. Now rate each destination for each attribute following using the 5-point scales provided: Your personal familiarity with the destination as a meetings site/destination.

Base: All respondents. 256 completed surveys.

# Competitive Set – Likelihood to Choose as a Meetings Site

Following the trend seen thus far, Monterey County is surpassed by San Diego and San Francisco in its likelihood to be selected as a meeting site in the next five years. By a small margin, a higher percentage of meeting planners surveyed are “Likely” or “Very likely” to choose San Francisco than are likely to select Monterey County as a meeting destination in the next five years (57.0% vs. 55.1%). Meanwhile, two-thirds of these meeting planners gave San Diego a top-two box score of 66.0 percent regarding its likelihood to be selected. Moderate and Heavy Users reported the highest likelihood of selecting Monterey (84.1% and 83.3%, respectively). Those who have never used Monterey County had the relatively lowest likelihood to select Monterey County (25.7%).

## Total Answering

	Top Two Box Score	Mean Score
San Diego	66.0%	4.0
San Francisco	57.0%	3.6
Monterey County	55.1%	3.6
Napa Valley	43.4%	3.2
Palm Springs	37.9%	3.2
Sonoma County	35.2%	3.1
Lake Tahoe	32.8%	3.0
San Jose	29.7%	2.9
Sacramento	29.3%	2.9
Santa Barbara	25.0%	2.8

## Detail by Past Experience in Monterey County—TOP TWO BOX SCORE (Extremely likely & Likely)

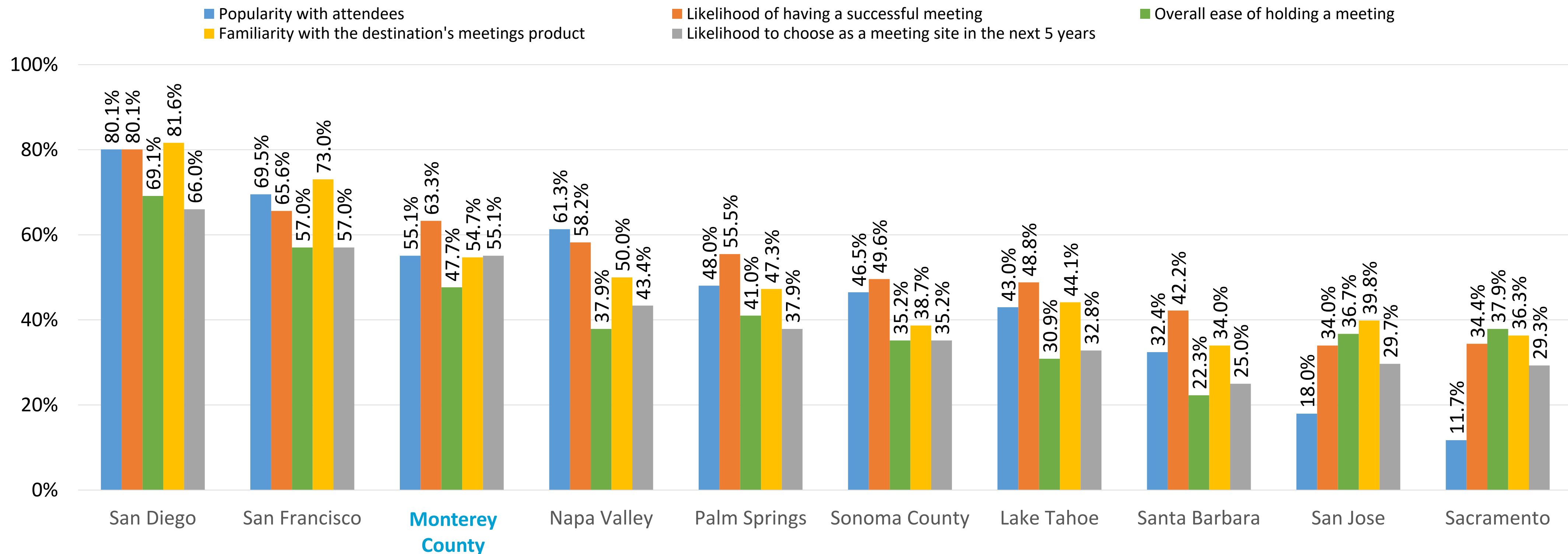
	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
San Diego	66.0%	73.8%	69.6%	79.2%	57.5%
San Francisco	57.0%	64.3%	60.9%	54.2%	52.2%
Monterey County	55.1%	83.3%	84.1%	66.7%	25.7%
Napa Valley	43.4%	54.8%	46.4%	50.0%	34.5%
Palm Springs	37.9%	52.4%	42.0%	54.2%	26.5%
Sonoma County	35.2%	45.2%	49.3%	37.5%	20.4%
Lake Tahoe	32.8%	42.9%	43.5%	37.5%	22.1%
San Jose	29.7%	50.0%	39.1%	12.5%	19.5%
Sacramento	29.3%	40.5%	39.1%	29.2%	18.6%
Santa Barbara	25.0%	40.5%	23.2%	29.2%	18.6%
Base	256	42	69	24	113

Question: In the next question that follow, please: Think of the destinations listed as sites for the types of meetings you most typically plan. Answer the questions based on your current knowledge and impression of each destination, even if you have never planned a meeting there. Now rate each destination for each attribute following using the 5-point scales provided: Likelihood to choose as a meeting site in the next 5 years.

Base: All respondents. 256 completed surveys.

# Comparison of Ratings – Monterey vs. Competitive Set

**Monterey County faces fierce competition by San Diego and San Francisco.** The chart below illustrates the top-two box score for each destination attribute tested for Monterey County and its competitive set. San Diego and San Francisco received higher top-two box scores than Monterey County for the five attributes of popularity with attendees, likelihood of hosting a successful meeting, overall ease of holding a meeting, familiarity with the destination’s meetings product and likelihood to select the destination as a meeting site in the next five years. Aside from San Diego and San Francisco, Monterey County also faces competition from Napa Valley in terms of popularity with attendees.



Question: In the next question that follow, please: Think of the destinations listed as sites for the types of meetings you most typically plan. Answer the questions based on your current knowledge and impression of each destination, even if you have never planned a meeting there. Now rate each destination for each attribute following using the 5-point scales provided: All aspects tested.

Base: All respondents. 256 completed surveys.

# Best Destination for Incentive Meetings

**Napa Valley is commonly considered to be the best destination for incentive meetings.** In another series of questions, meeting planners were asked to select the one best destination for each of several meeting types and destination attributes. The first of these was the best destination for incentive meetings. One-third of meeting planners surveyed selected Napa Valley as the best destination for incentive meetings (33.6%). San Francisco also outpaced Monterey County at 14.8 percent. Amongst the ten California destinations tested, Monterey County ranked third, selected by one-in-ten meeting planners (10.5%). Amongst user segments, Heavy (19.0%) and Moderate (18.8%) Users were more likely to select Monterey County as the best destination for incentive meetings compared to Infrequent or Historic users (12.5%) and those who have never used Monterey County (2.7%).

## Total Answering

	Incentive Meetings
Napa Valley	33.6%
San Francisco	14.8%
Monterey County	10.5%
San Diego	10.2%
Palm Springs	10.2%
Lake Tahoe	8.6%
Sonoma County	5.5%
Santa Barbara	5.5%
Sacramento	0.8%
San Jose	0.4%
Base	256

## Detail by Past Experience in Monterey County

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
Napa Valley	33.6%	38.1%	24.6%	41.7%	36.3%
San Francisco	14.8%	9.5%	11.6%	16.7%	18.6%
Monterey County	10.5%	19.0%	18.8%	12.5%	2.7%
San Diego	10.2%	9.5%	11.6%	8.3%	10.6%
Palm Springs	10.2%	7.1%	8.7%	8.3%	12.4%
Lake Tahoe	8.6%	2.4%	11.6%	4.2%	9.7%
Sonoma County	5.5%	2.4%	7.2%	0.0%	6.2%
Santa Barbara	5.5%	9.5%	4.3%	8.3%	3.5%
Sacramento	0.8%	0.0%	1.4%	0.0%	0.0%
San Jose	0.4%	2.4%	0.0%	0.0%	0.0%
Base	256	42	69	24	113

Question: Of the destinations you just evaluated, which is best for each of the following?  
Please use the drop down menu next to each to make your selection: Incentive Meetings.

Base: All respondents. 256 completed surveys.

# Best Destination for Association Meetings

**San Diego and San Francisco are perceived by meeting planners to be the best destinations for association meetings.** Supporting the fact that San Diego and San Francisco are Monterey County’s top competitive meetings destinations, San Diego (39.1%) and San Francisco (21.1%) were most commonly selected as the best destinations for association meetings, each chosen by approximately one-in-five or more of meeting planners surveyed. Sacramento also outweighs Monterey County as an association meetings destination (14.1%). Of the California destinations tested, Monterey County ranked fourth (8.6%). Similar to findings regarding the best destination for incentive meetings, the Heavy (23.8%) and Moderate User segments (13.0%) were more likely to select Monterey County as the best association meetings destination compared to Infrequent or Historic Users (8.3%) and the Never Used segment (0.9%).

## Total Answering

	Association Meetings
San Diego	39.1%
San Francisco	21.1%
Sacramento	14.1%
Monterey County	8.6%
Palm Springs	5.5%
San Jose	4.3%
Lake Tahoe	3.1%
Napa Valley	2.3%
Santa Barbara	1.2%
Sonoma County	0.8%
Base	256

## Detail by Past Experience in Monterey County

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
San Diego	39.1%	26.2%	36.2%	50.0%	42.5%
San Francisco	21.1%	23.8%	15.9%	12.5%	26.5%
Sacramento	14.1%	11.9%	18.8%	20.8%	8.0%
Monterey County	8.6%	23.8%	13.0%	8.3%	0.9%
Palm Springs	5.5%	0.0%	4.3%	8.3%	8.0%
San Jose	4.3%	11.9%	5.8%	0.0%	1.8%
Lake Tahoe	3.1%	2.4%	2.9%	0.0%	4.4%
Napa Valley	2.3%	0.0%	0.0%	0.0%	5.3%
Santa Barbara	1.2%	0.0%	1.4%	0.0%	1.8%
Sonoma County	0.8%	0.0%	1.4%	0.0%	0.9%
Base	256	42	69	24	113

Question: Of the destinations you just evaluated, which is best for each of the following? Please use the drop down menu next to each to make your selection: Association Meetings.

Base: All respondents. 256 completed surveys.

# Best Destination for Corporate Meetings

**San Francisco and San Diego are again considered to be the best destinations for corporate meetings.** Four-in-ten meeting planners selected San Francisco (43.4%), followed by one-in-five who selected San Diego (21.9%), as the best destination for corporate meetings. Amongst the ten destinations tested, Monterey County ranked seventh, with 4.3 percent of all meeting planners surveyed who chose Monterey County as the best corporate meetings destination. Though by a slim margin, Monterey County trails behind San Jose (6.3%), Sacramento (5.9%), Napa Valley (5.5%) and Palm Springs (5.1%). Only 2.7 percent of those who have never used Monterey County reported that Monterey County was the best destination for corporate meetings.

## Total Answering

	Corporate Meetings
San Francisco	43.4%
San Diego	21.9%
San Jose	6.3%
Sacramento	5.9%
Napa Valley	5.5%
Palm Springs	5.1%
Monterey County	4.3%
Santa Barbara	3.5%
Lake Tahoe	2.7%
Sonoma County	1.6%
Base	256

## Detail by Past Experience in Monterey County

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
San Francisco	43.4%	57.1%	31.9%	45.8%	43.4%
San Diego	21.9%	9.5%	21.7%	16.7%	26.5%
San Jose	6.3%	9.5%	7.2%	4.2%	5.3%
Sacramento	5.9%	4.8%	11.6%	8.3%	2.7%
Napa Valley	5.5%	0.0%	10.1%	4.2%	5.3%
Palm Springs	5.1%	4.8%	5.8%	4.2%	5.3%
Monterey County	4.3%	4.8%	7.2%	4.2%	2.7%
Santa Barbara	3.5%	7.1%	2.9%	0.0%	3.5%
Lake Tahoe	2.7%	2.4%	1.4%	4.2%	3.5%
Sonoma County	1.6%	0.0%	0.0%	8.3%	1.8%
Base	256	42	69	24	113

Question: Of the destinations you just evaluated, which is best for each of the following?  
Please use the drop down menu next to each to make your selection: Corporate Meetings.

Base: All respondents. 256 completed surveys.

# Best Destination for SMERF Meetings

Meeting planners view San Francisco, San Diego and Sacramento to be the best destinations for SMERF meetings. Approximately 15 percent or more of all meeting planners surveyed selected San Francisco (20.7%), San Diego (20.3%) or Sacramento (16.8%) as the best destination for SMERF meetings. About 5 percent chose Monterey County as the best SMERF meetings destination (5.5%), placing it at the seventh rank out of the ten destinations tested. For these meeting planners, San Jose (9.4%), Palm Springs (8.6%) and Lake Tahoe (7.8%) surpass Monterey County as the best SMERF meetings destination. Only 4.4 percent of the never used segment reported that Monterey County was the best destination for SMERF meetings.

## Total Answering

	SMERF Meetings
San Francisco	20.7%
San Diego	20.3%
Sacramento	16.8%
San Jose	9.4%
Palm Springs	8.6%
Lake Tahoe	7.8%
Monterey County	5.5%
Napa Valley	3.9%
Sonoma County	3.9%
Santa Barbara	3.1%
Base	256

## Detail by Past Experience in Monterey County

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
San Francisco	20.7%	11.9%	23.2%	8.3%	24.8%
San Diego	20.3%	19.0%	13.0%	29.2%	23.0%
Sacramento	16.8%	19.0%	17.4%	37.5%	9.7%
San Jose	9.4%	16.7%	8.7%	4.2%	8.8%
Palm Springs	8.6%	11.9%	11.6%	8.3%	6.2%
Lake Tahoe	7.8%	4.8%	5.8%	8.3%	9.7%
Monterey County	5.5%	7.1%	7.2%	4.2%	4.4%
Napa Valley	3.9%	4.8%	1.4%	0.0%	6.2%
Sonoma County	3.9%	0.0%	7.2%	0.0%	4.4%
Santa Barbara	3.1%	4.8%	4.3%	0.0%	2.7%
Base	256	42	69	24	113

Question: Of the destinations you just evaluated, which is best for each of the following? Please use the drop down menu next to each to make your selection: SMERF Meetings.

Base: All respondents. 256 completed surveys.



# Best Destination for Meetings 0-100 Peak Room Nights

For meetings of 0-100 peak room nights, meeting planners consider San Diego to be the best destination, closely followed by Monterey County. Monterey County ranked second as the best destination for meetings of 0-100 peak room nights, with 16.4 percent of meeting planners who selected Monterey County. San Diego just slightly surpasses Monterey County as the best destination, at 17.6 percent. Following Monterey County, San Francisco (14.5%) and Napa Valley (12.5%) were also selected as the best destinations, each reported by about 15 percent of meeting planners surveyed. Of the four user segments, Heavy Users were most likely to select Monterey County as the best destination, at 31.0 percent. Five percent of those who have never used Monterey County selected it as the best destination for meetings of 0-100 peak room nights (5.3%).

## Total Answering

	Meetings 0-100 Peak Room Nights
San Diego	17.6%
Monterey County	16.4%
San Francisco	14.5%
Napa Valley	12.5%
Sonoma County	7.8%
Santa Barbara	7.8%
Lake Tahoe	7.4%
Sacramento	6.6%
San Jose	5.5%
Palm Springs	3.9%
Base	256

## Detail by Past Experience in Monterey County

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
San Diego	17.6%	11.9%	15.9%	25.0%	20.4%
Monterey County	16.4%	31.0%	24.6%	20.8%	5.3%
San Francisco	14.5%	14.3%	10.1%	4.2%	17.7%
Napa Valley	12.5%	16.7%	10.1%	12.5%	13.3%
Sonoma County	7.8%	9.5%	7.2%	4.2%	8.0%
Santa Barbara	7.8%	7.1%	5.8%	0.0%	11.5%
Lake Tahoe	7.4%	0.0%	8.7%	12.5%	8.8%
Sacramento	6.6%	4.8%	5.8%	8.3%	7.1%
San Jose	5.5%	4.8%	7.2%	0.0%	5.3%
Palm Springs	3.9%	0.0%	4.3%	12.5%	2.7%
Base	256	42	69	24	113

Question: Of the destinations you just evaluated, which is best for each of the following? Please use the drop down menu next to each to make your selection: Meetings 0-100 Peak Room Nights.

Base: All respondents. 256 completed surveys.

# Best Destination for Meetings 100-500 Peak Room Nights

For meetings of 100-500 peak room nights, San Diego and San Francisco are considered to be the best destinations. About one-third of meeting planners surveyed reported that San Diego (33.2%) or San Francisco (29.7%) was the best destination for meetings of 100-500 peak room nights. As the number of peak room nights increases, Monterey County moves lower in rank as the best destination. In this case, Monterey County ranked third, selected by one-in-ten meeting planners (10.5%). The other seven California destinations tested were each selected by less than 10 percent of meeting planners surveyed. Amongst the Monterey County user segments, Heavy Users were most likely to select Monterey County as the best destination for meetings of 100-500 peak room nights (23.8%). Of the never used segment, less than five percent selected Monterey County as the best destination in this regard (2.7%).

## Total Answering

	Meetings 100-500 Peak Room Nights
San Diego	33.2%
San Francisco	29.7%
Monterey County	10.5%
Palm Springs	7.4%
San Jose	7.0%
Sacramento	4.3%
Napa Valley	3.1%
Lake Tahoe	2.7%
Santa Barbara	1.2%
Sonoma County	0.8%
Base	256

## Detail by Past Experience in Monterey County

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
San Diego	33.2%	26.2%	27.5%	41.7%	38.1%
San Francisco	29.7%	23.8%	30.4%	20.8%	32.7%
Monterey County	10.5%	23.8%	14.5%	16.7%	2.7%
Palm Springs	7.4%	7.1%	14.5%	8.3%	2.7%
San Jose	7.0%	4.8%	7.2%	0.0%	8.8%
Sacramento	4.3%	4.8%	2.9%	4.2%	4.4%
Napa Valley	3.1%	2.4%	1.4%	0.0%	5.3%
Lake Tahoe	2.7%	4.8%	1.4%	8.3%	1.8%
Santa Barbara	1.2%	0.0%	0.0%	0.0%	2.7%
Sonoma County	0.8%	2.4%	0.0%	0.0%	0.9%
Base	256	42	69	24	113

Question: Of the destinations you just evaluated, which is best for each of the following? Please use the drop down menu next to each to make your selection: Meetings 100-500 Peak Room Nights.

Base: All respondents. 256 completed surveys.

# Best Destination for Meetings 500+ Peak Room Nights

**San Francisco and San Diego again dominate as the best destinations for large meetings of 500+ peak room nights.** Over one-third of meeting planners surveyed selected San Francisco (45.7%) or San Diego (35.2%) as the best destination for meetings of 500+ peak room nights. All other destinations tested were selected by five percent or fewer of all meeting planners. Monterey County ranked fifth (3.1%), highlighting the fact that Monterey County moves lower in rank as the number of peak room nights increases. Less than five percent of the Never Used segment selected Monterey County (2.7%), while 7.1 percent of Heavy Users selected it as the best destination for meetings of 500+ peak room nights.

## Total Answering

	Meetings 500+ Peak Room Nights
San Francisco	45.7%
San Diego	35.2%
San Jose	4.7%
Palm Springs	4.3%
Monterey County	3.1%
Sacramento	2.7%
Lake Tahoe	2.0%
Santa Barbara	1.6%
Napa Valley	0.8%
Sonoma County	0.0%
Base	256

## Detail by Past Experience in Monterey County

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
San Francisco	45.7%	54.8%	37.7%	62.5%	45.1%
San Diego	35.2%	26.2%	36.2%	29.2%	38.1%
San Jose	4.7%	0.0%	7.2%	4.2%	5.3%
Palm Springs	4.3%	4.8%	8.7%	0.0%	2.7%
Monterey County	3.1%	7.1%	1.4%	0.0%	2.7%
Sacramento	2.7%	0.0%	2.9%	0.0%	3.5%
Lake Tahoe	2.0%	4.8%	4.3%	0.0%	0.0%
Santa Barbara	1.6%	2.4%	0.0%	0.0%	2.7%
Napa Valley	0.8%	0.0%	1.4%	4.2%	0.0%
Sonoma County	0.0%	0.0%	0.0%	0.0%	0.0%
Base	256	42	69	24	113

Question: Of the destinations you just evaluated, which is best for each of the following? Please use the drop down menu next to each to make your selection: Meetings 500+ Peak Room Nights.

Base: All respondents. 256 completed surveys.

# Best Destination for Wow Factor

**Napa Valley and San Francisco are the best destinations for wow factor.** One-in-five meeting planners surveyed selected Napa Valley (21.5%) or San Francisco (19.5%) as the best destination that has wow factor. Monterey County ranked third as the best destination, at 14.5 percent. Similar percentages of meeting planners also considered San Diego (12.9%), Lake Tahoe (10.2%) or Santa Barbara (9.0%) as the best meetings destination for wow factor. Amongst the Monterey County user segments, Moderate and Heavy Users were most likely to select Monterey County as the best meetings destination for wow factor (24.6% and 21.4%, respectively), while nearly one-in-ten those who have never used Monterey County selected it (8.0%).

## Total Answering

	Wow Factor
Napa Valley	21.5%
San Francisco	19.5%
Monterey County	14.5%
San Diego	12.9%
Lake Tahoe	10.2%
Santa Barbara	9.0%
Palm Springs	7.4%
Sonoma County	4.7%
San Jose	0.4%
Sacramento	0.0%
Base	256

## Detail by Past Experience in Monterey County

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
Napa Valley	21.5%	14.3%	17.4%	33.3%	23.0%
San Francisco	19.5%	9.5%	17.4%	33.3%	22.1%
Monterey County	14.5%	21.4%	24.6%	4.2%	8.0%
San Diego	12.9%	19.0%	14.5%	4.2%	12.4%
Lake Tahoe	10.2%	9.5%	8.7%	0.0%	11.5%
Santa Barbara	9.0%	19.0%	8.7%	8.3%	6.2%
Palm Springs	7.4%	4.8%	7.2%	8.3%	8.8%
Sonoma County	4.7%	2.4%	1.4%	8.3%	7.1%
San Jose	0.4%	0.0%	0.0%	0.0%	0.9%
Sacramento	0.0%	0.0%	0.0%	0.0%	0.0%
Base	256	42	69	24	113

Question: Of the destinations you just evaluated, which is best for each of the following?  
Please use the drop down menu next to each to make your selection: Wow factor.

Base: All respondents. 256 completed surveys.

# Best Destination for Scenic Beauty/Beautiful Environment

**Monterey County is considered the best destination for scenic beauty.** About 30 percent of meeting planners surveyed selected Monterey County as the best destination for scenic beauty and/or beautiful environment (30.5%). Monterey County was closely followed by Lake Tahoe, at 25.8 percent, while Napa Valley ranked third at 13.7 percent. Moderate (47.8%) and Heavy (40.5%) Users were most likely to select Monterey County as the best destination. While the Never Used segment was the least likely of all user segments to select Monterey County, one-in-five of this segment selected Monterey County as the best destination for scenic beauty (19.5%).

## Total Answering

	Scenic Beauty/ Beautiful Environment
<b>Monterey County</b>	<b>30.5%</b>
Lake Tahoe	25.8%
Napa Valley	13.7%
Santa Barbara	8.2%
Sonoma County	6.3%
San Diego	5.9%
Palm Springs	4.3%
San Francisco	3.9%
San Jose	1.2%
Sacramento	0.4%
Base	<b>256</b>

## Detail by Past Experience in Monterey County

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
<b>Monterey County</b>	<b>30.5%</b>	<b>40.5%</b>	<b>47.8%</b>	<b>20.8%</b>	<b>19.5%</b>
Lake Tahoe	25.8%	16.7%	23.2%	25.0%	27.4%
Napa Valley	13.7%	14.3%	2.9%	8.3%	21.2%
Santa Barbara	8.2%	14.3%	5.8%	16.7%	6.2%
Sonoma County	6.3%	4.8%	8.7%	0.0%	7.1%
San Diego	5.9%	2.4%	4.3%	16.7%	6.2%
Palm Springs	4.3%	2.4%	2.9%	8.3%	5.3%
San Francisco	3.9%	4.8%	0.0%	0.0%	7.1%
San Jose	1.2%	0.0%	2.9%	4.2%	0.0%
Sacramento	0.4%	0.0%	1.4%	0.0%	0.0%
Base	<b>256</b>	<b>42</b>	<b>69</b>	<b>24</b>	<b>113</b>

Question: Of the destinations you just evaluated, which is best for each of the following? Please use the drop down menu next to each to make your selection: Scenic Beauty/Beautiful environment.

Base: All respondents. 256 completed surveys.

# Best Destination for Meetings Hotels

**San Francisco and San Diego are considered by meeting planners to be the best destinations for meetings hotels.** Again highlighting Monterey County’s strict competition from these two destinations, over one-third of meeting planners surveyed selected San Francisco (39.1%) or San Diego (34.8%) as the best destination for meetings hotels. Monterey County ranked fourth in this aspect (5.5%), slightly surpassed by Sacramento (7.4%). Approximately one-in-ten Heavy (11.9%) and Moderate (11.6%) Users selected Monterey County, while less than one percent of the Never Used segment selected Monterey County as the best destination for meetings hotels (0.9%).

## Total Answering

	Meetings Hotels
San Francisco	39.1%
San Diego	34.8%
Sacramento	7.4%
Monterey County	5.5%
Palm Springs	5.1%
San Jose	4.3%
Lake Tahoe	2.0%
Napa Valley	0.8%
Santa Barbara	0.8%
Sonoma County	0.4%
Base	256

## Detail by Past Experience in Monterey County

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
San Francisco	39.1%	42.9%	30.4%	29.2%	44.2%
San Diego	34.8%	26.2%	29.0%	54.2%	38.9%
Sacramento	7.4%	7.1%	7.2%	4.2%	7.1%
Monterey County	5.5%	11.9%	11.6%	0.0%	0.9%
Palm Springs	5.1%	4.8%	8.7%	4.2%	3.5%
San Jose	4.3%	4.8%	8.7%	4.2%	1.8%
Lake Tahoe	2.0%	0.0%	2.9%	4.2%	0.9%
Napa Valley	0.8%	0.0%	1.4%	0.0%	0.9%
Santa Barbara	0.8%	0.0%	0.0%	0.0%	1.8%
Sonoma County	0.4%	2.4%	0.0%	0.0%	0.0%
Base	256	42	69	24	113

Question: Of the destinations you just evaluated, which is best for each of the following? Please use the drop down menu next to each to make your selection: Meetings Hotels.

Base: All respondents. 256 completed surveys.

# Best Destination for Price/Value

Meeting planners perceive San Diego and Sacramento to be the best meetings destinations for value. Over one-quarter of all meeting planners surveyed selected San Diego (28.1%), and about one-fifth selected Sacramento (22.7%), as the best destination for price and/or value. Of the ten destinations tested, Monterey County ranked fourth, at 12.5 percent, following closely behind San Jose (14.1%). Amongst the user segments, Moderate and Heavy Users were most likely to select Monterey County (21.7% and 16.7%, respectively), while the Never Used segment was least likely to select Monterey County as best meetings destination for value (7.1%).

## Total Answering

	Price/Value
San Diego	28.1%
Sacramento	22.7%
San Jose	14.1%
Monterey County	12.5%
Palm Springs	8.2%
Lake Tahoe	5.1%
San Francisco	3.9%
Santa Barbara	2.7%
Sonoma County	1.6%
Napa Valley	1.2%
Base	256

## Detail by Past Experience in Monterey County

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
San Diego	28.1%	19.0%	20.3%	29.2%	37.2%
Sacramento	22.7%	28.6%	18.8%	29.2%	19.5%
San Jose	14.1%	14.3%	10.1%	16.7%	14.2%
Monterey County	12.5%	16.7%	21.7%	8.3%	7.1%
Palm Springs	8.2%	4.8%	14.5%	8.3%	6.2%
Lake Tahoe	5.1%	4.8%	8.7%	8.3%	2.7%
San Francisco	3.9%	2.4%	0.0%	0.0%	8.0%
Santa Barbara	2.7%	4.8%	2.9%	0.0%	2.7%
Sonoma County	1.6%	2.4%	1.4%	0.0%	1.8%
Napa Valley	1.2%	2.4%	1.4%	0.0%	0.9%
Base	256	42	69	24	113

Question: Of the destinations you just evaluated, which is best for each of the following?  
Please use the drop down menu next to each to make your selection: Price/Value.

Base: All respondents. 256 completed surveys.

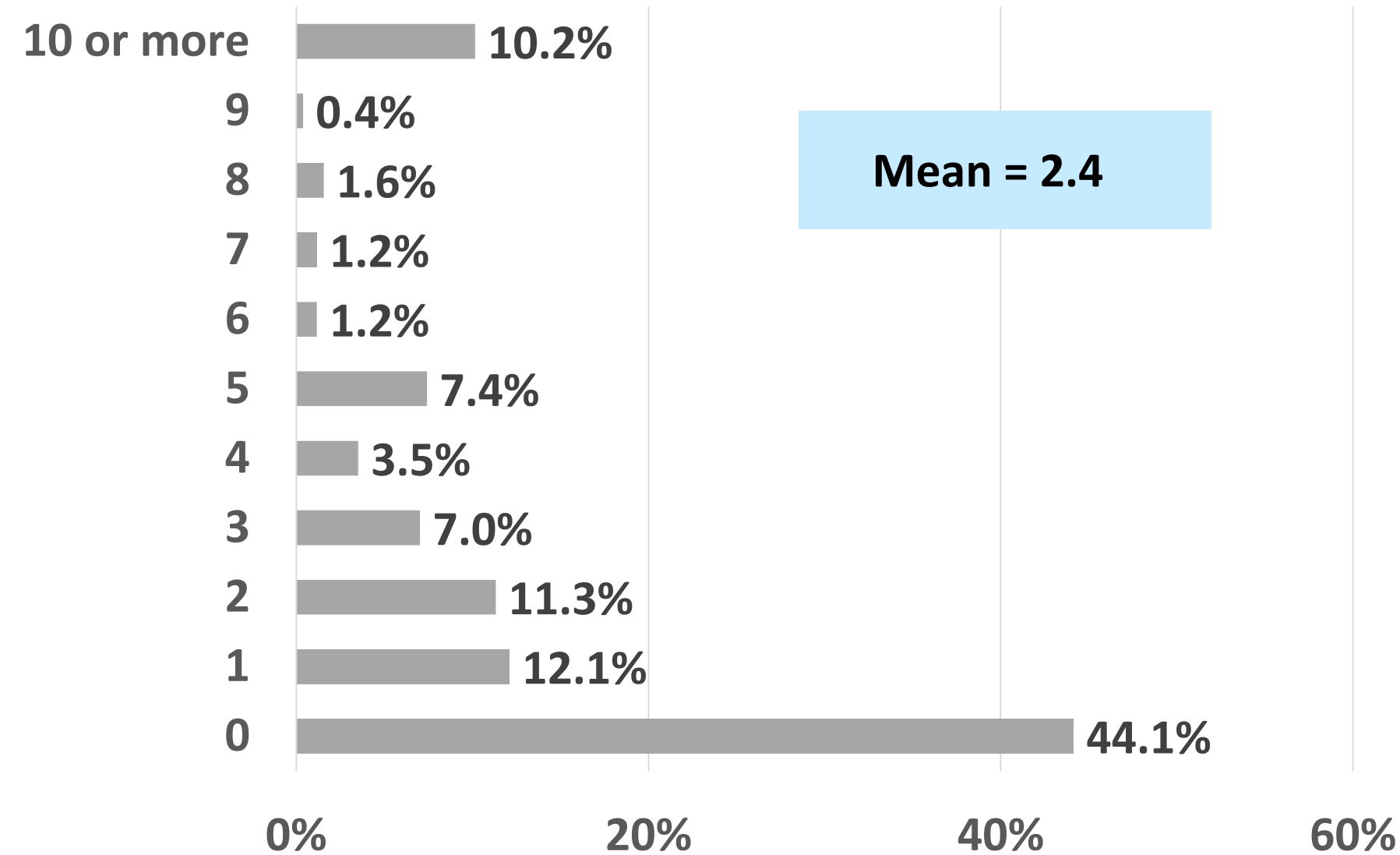
THE MONTEREY COUNTY MEETINGS  
DESTINATION BRAND –  
IN-DEPTH



# Number of Past Meetings Held in Monterey County

Over one half of meeting planners surveyed have previously held meetings in Monterey County. 56 percent have held meetings in Monterey County and 44 percent have not.

Chart 28: Number of Past Meetings Held in Monterey County



Detail by Past Experience in Monterey County

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
10 or more	10.2%	42.9%	7.2%	12.5%	--
9	0.4%	0.0%	1.4%	0.0%	--
8	1.6%	4.8%	1.4%	4.2%	--
7	1.2%	2.4%	2.9%	0.0%	--
6	1.2%	4.8%	1.4%	0.0%	--
5	7.4%	21.4%	11.6%	8.3%	--
4	3.5%	4.8%	7.2%	4.2%	--
3	7.0%	9.5%	13.0%	16.7%	--
2	11.3%	7.1%	27.5%	29.2%	--
1	12.1%	2.4%	26.1%	25.0%	--
0	44.1%	0.0%	0.0%	0.0%	100.0%
<b>Mean</b>	<b>2.4</b>	<b>6.8</b>	<b>3.3</b>	<b>3.5</b>	<b>0.0</b>
<b>Base</b>	<b>256</b>	<b>42</b>	<b>69</b>	<b>24</b>	<b>113</b>

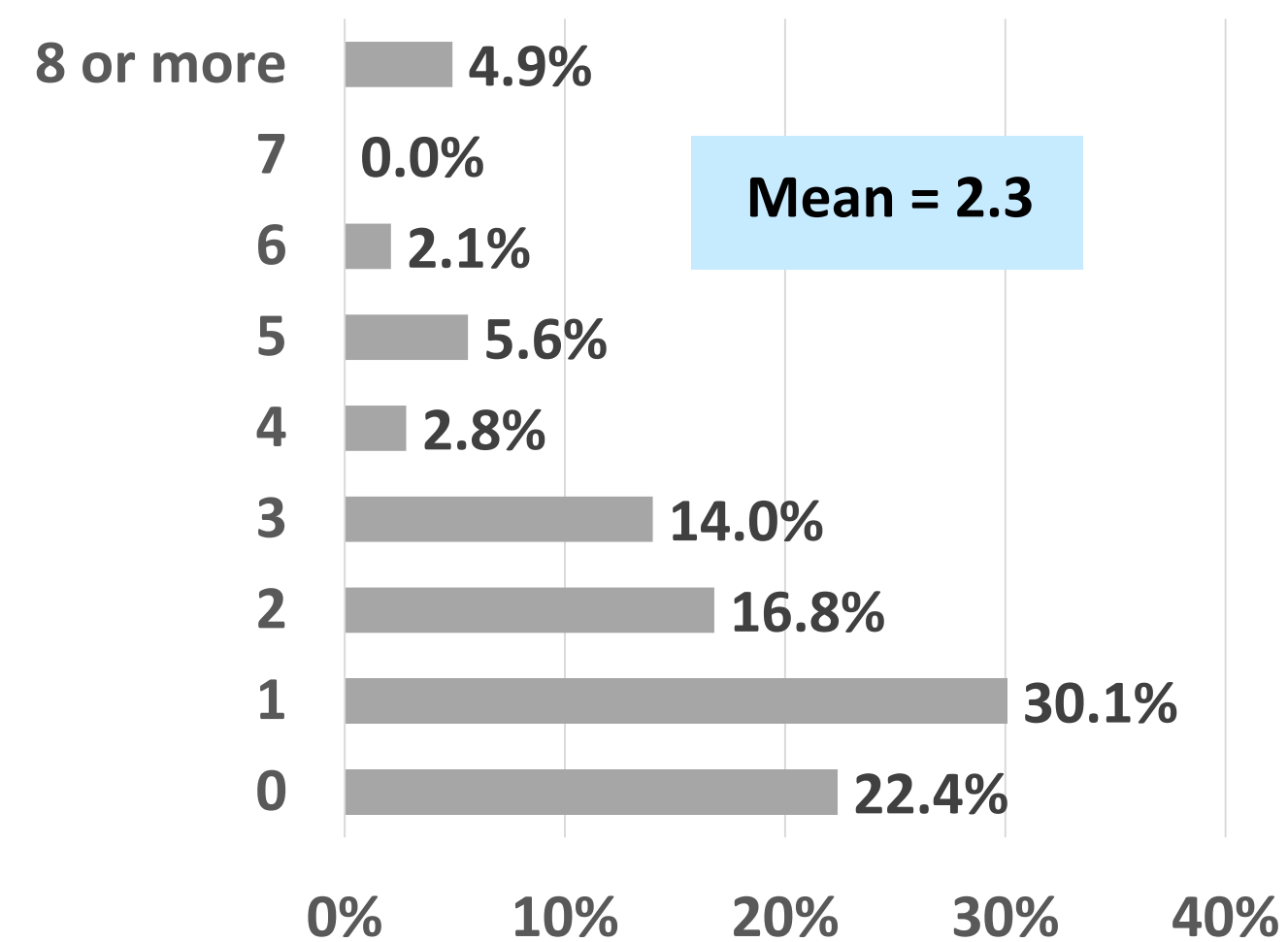
Question: In total, how many meetings or events have you ever planned or been involved in the organization of in Monterey County?

Base: All respondents. 256 completed surveys.

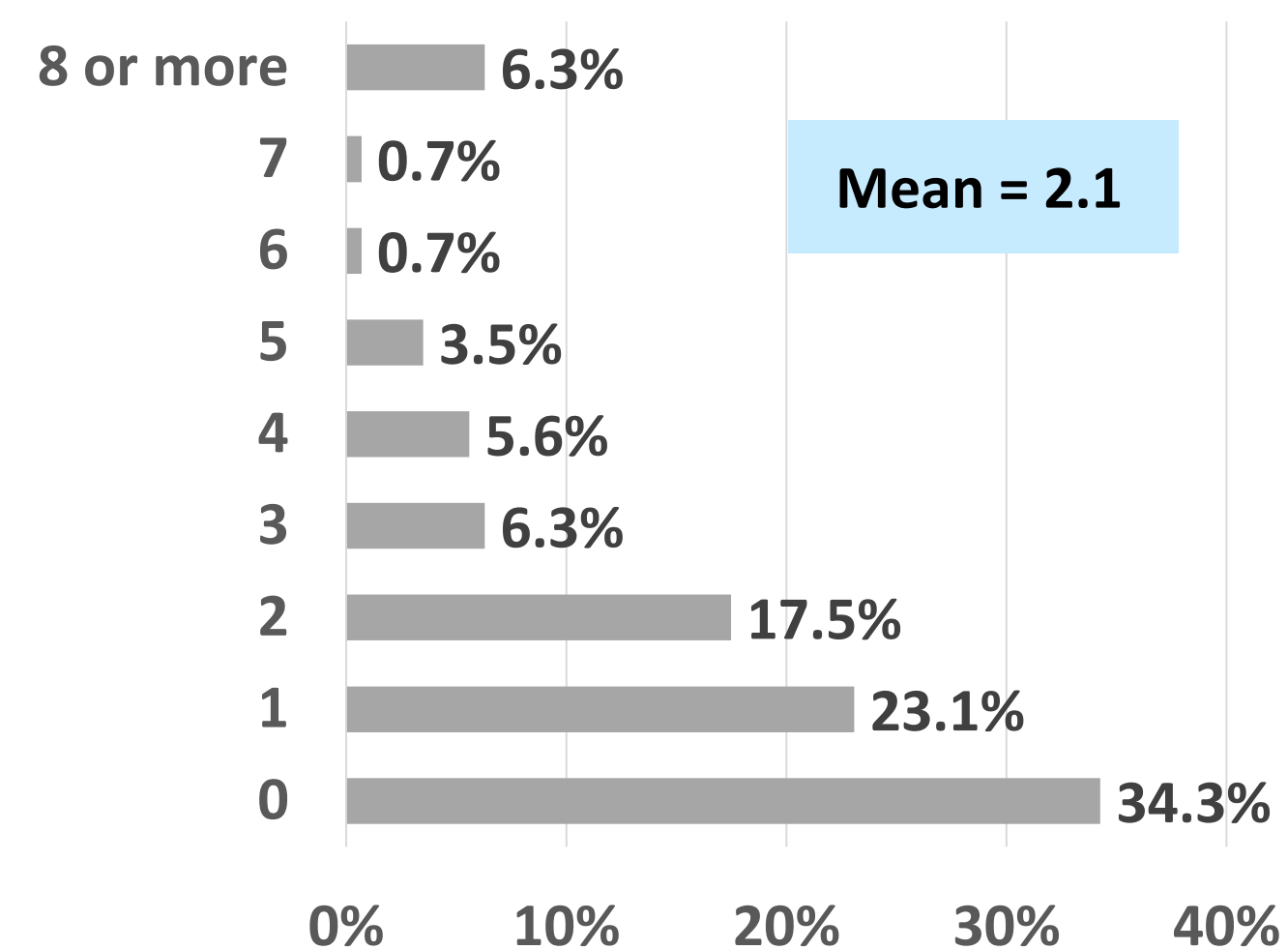
# Time Period of Past Meetings Held in Monterey County

Over three-quarters of meeting planners who reported previously holding meetings or events in Monterey County have held a meeting there in the last three years. Two-thirds have planned a meeting in Monterey County between three and five years ago or more than five years ago.

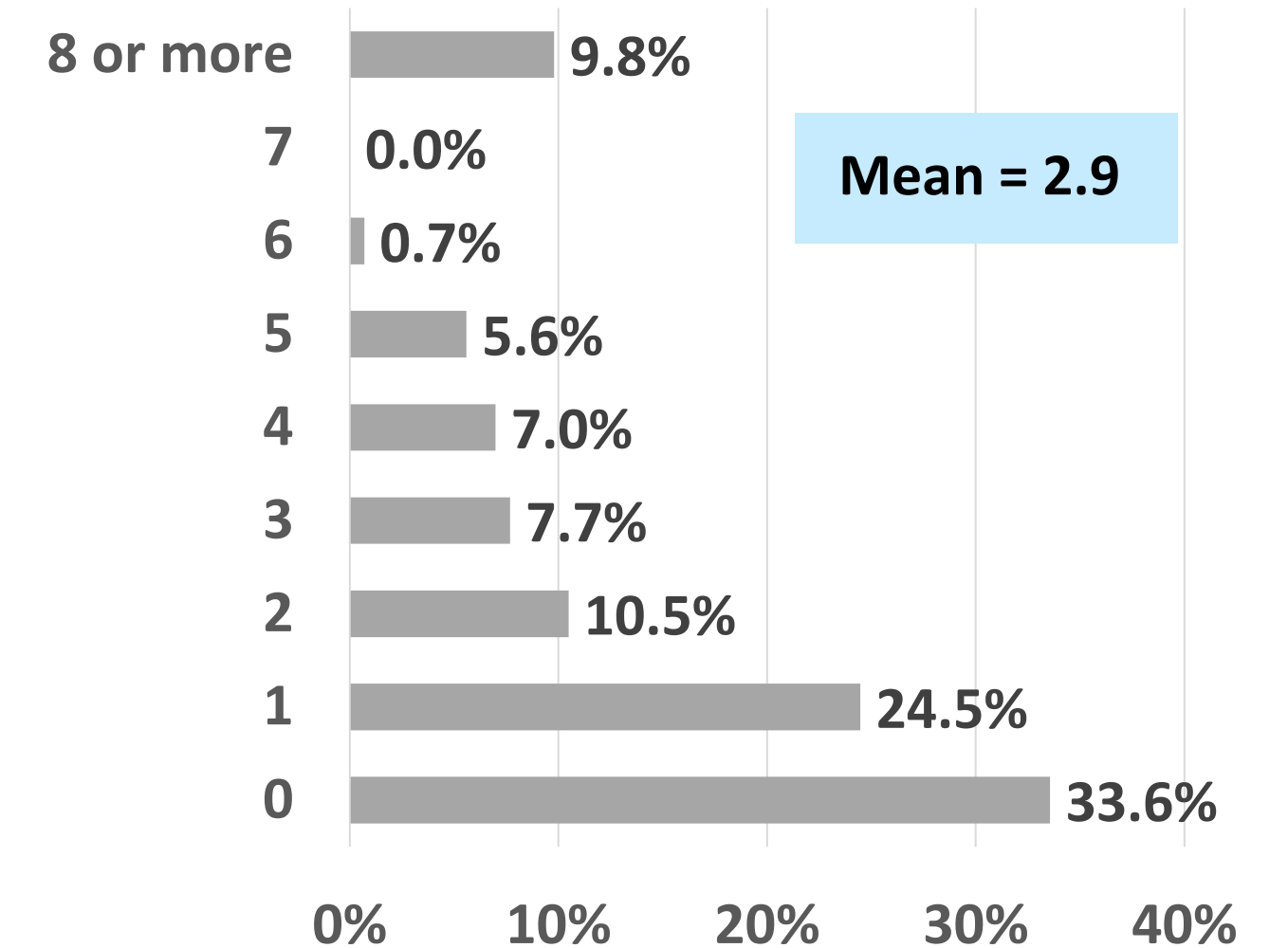
**Chart 29: Last 3 years**



**Chart 30: Between 3 – 5 Years Ago**



**Chart 31: More than 5 Years Ago**



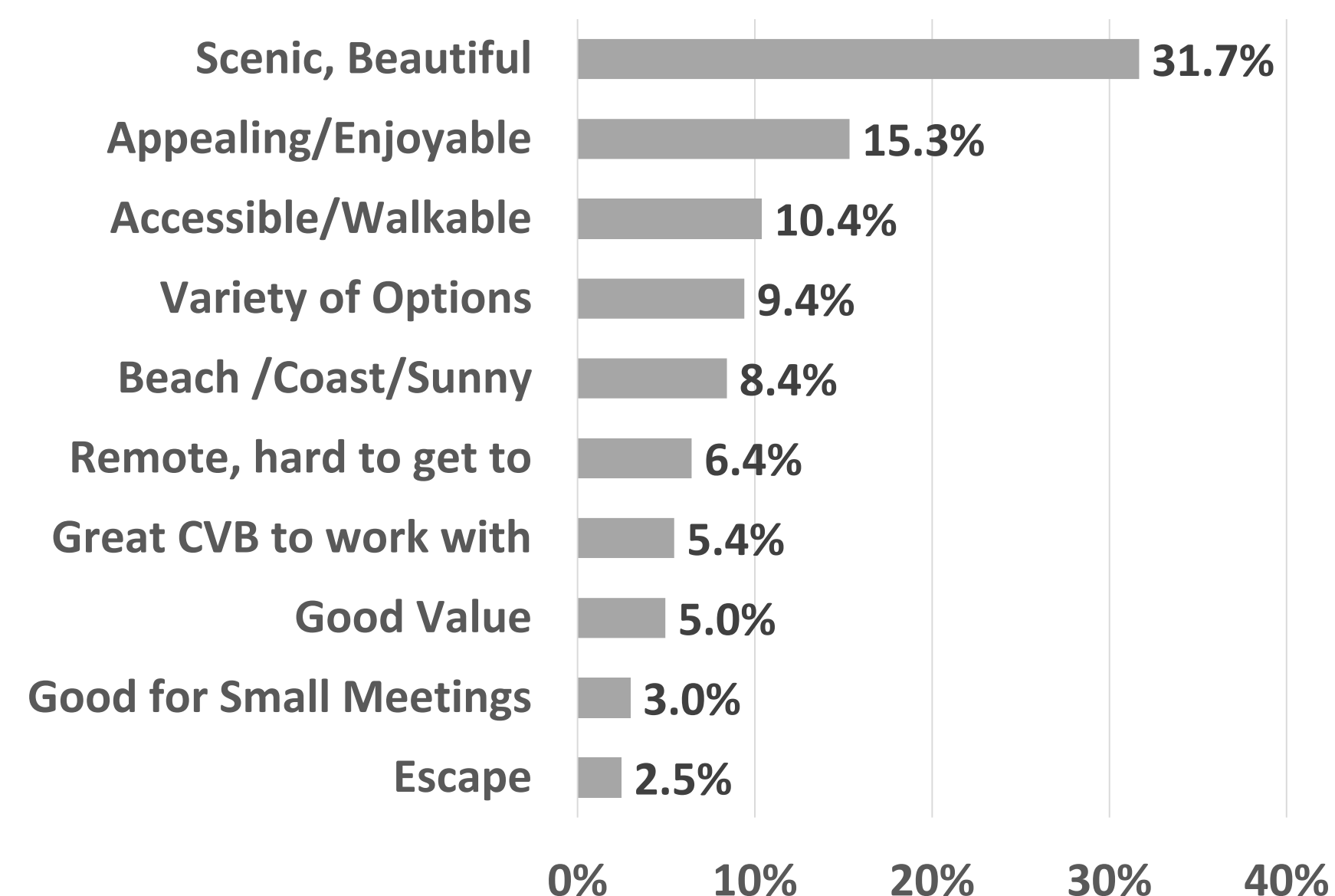
Question: How many meetings or events have you held in Monterey County in each of the following time periods?

Base: Respondents who have previously planned a meeting in Monterey County. 143 completed surveys.

# Description of Monterey County as a Meetings Destination (open-ended)

The top descriptions of Monterey County as a meetings destination that emerged were scenic and beautiful, appealing and enjoyable, accessible/walkable and having variety of options. Nearly one-third of meeting planners described Monterey as scenic and beautiful (31.7%), 15.3 percent described it as appealing/enjoyable, and 10.4 percent said Monterey County is an accessible/walkable meetings destination. Over one-third of Heavy Users wrote in scenic and beautiful (37.8%), while approximately one-quarter of those who have never used Monterey County described it that way (24.3%).

**Chart 32: Description of Monterey County as a Meetings Destination**



**Detail by Past Experience in Monterey County**

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
Scenic, Beautiful	31.7%	37.8%	34.9%	30.0%	24.3%
Appealing/Enjoyable	15.3%	8.1%	17.5%	25.0%	14.9%
Accessible/Walkable	10.4%	18.9%	7.9%	5.0%	9.5%
Variety of Options	9.4%	2.7%	9.5%	5.0%	13.5%
Beach /Coast/Sunny	8.4%	2.7%	7.9%	5.0%	12.2%
Remote, hard to get to	6.4%	2.7%	4.8%	10.0%	9.5%
Great CVB to work with	5.4%	10.8%	4.8%	10.0%	2.7%
Good Value	5.0%	10.8%	3.2%	0.0%	5.4%
Good for Small Meetings	3.0%	0.0%	6.3%	0.0%	2.7%
Escape	2.5%	0.0%	1.6%	0.0%	5.4%
Mean	2.4	6.8	3.3	3.5	0.0
Base	256	42	69	24	113

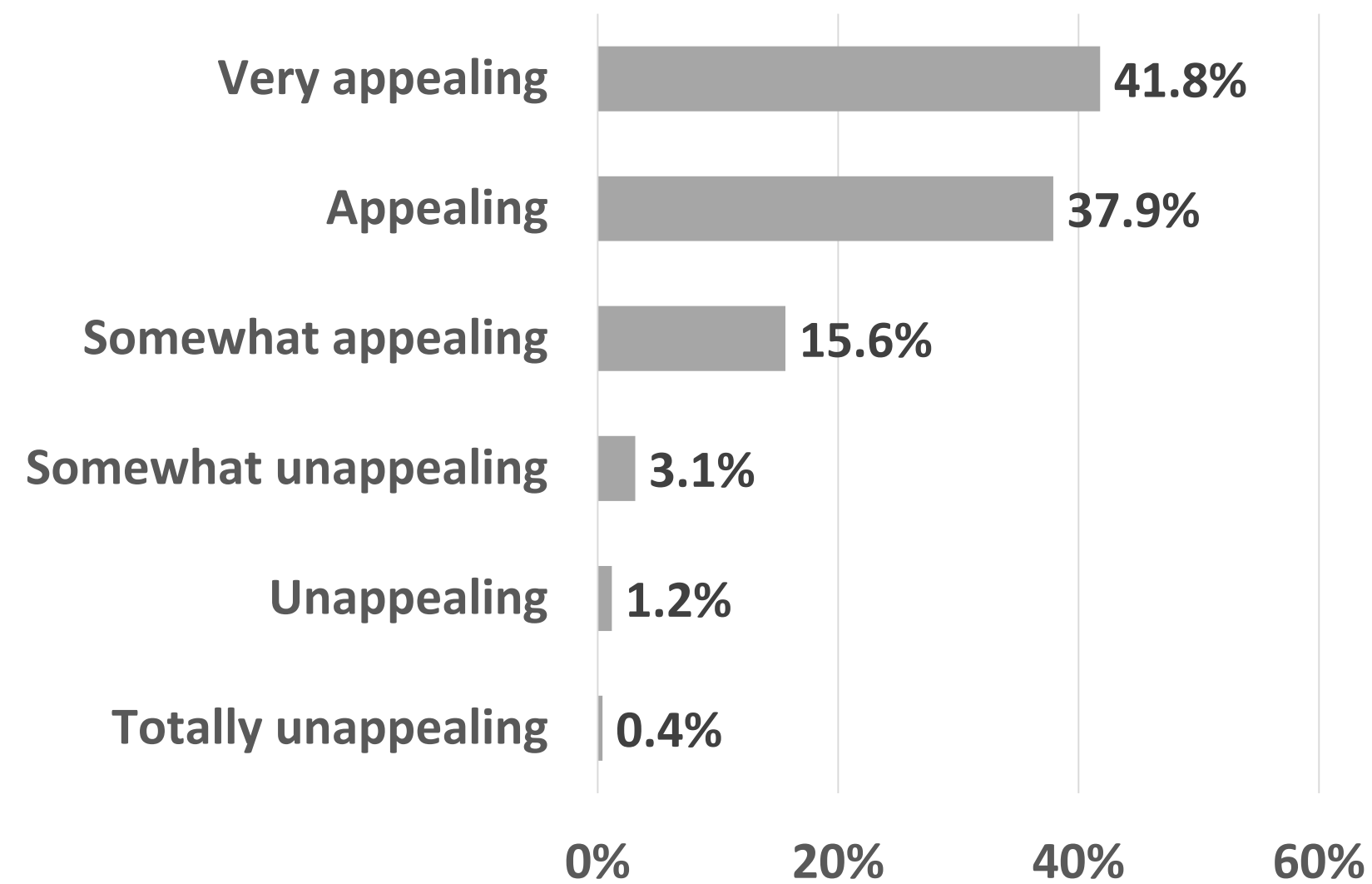
Question: How would you describe Monterey County and its key assets as a meetings destination? Please feel welcome to be as descriptive as possible.

Base: All respondents. 202 completed surveys.

# Monterey County's Appeal as a Meetings Destination

A strong majority of meeting planners find Monterey County appealing as a meetings destination. 97.3 percent reported Monterey to be “Very appealing”, “Appealing” or “Somewhat appealing.” Nine-in-ten planners who have never planned a meeting in Monterey County also find Monterey to be an appealing destination for meetings they typically plan (91.1% find Monterey “Very appealing”, “Appealing”, or “Somewhat appealing”).

**Chart 34: Monterey County's Appeal as a Meetings Destination**



**Detail by Past Experience in Monterey County**

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
Very appealing	41.8%	69.0%	58.0%	29.2%	26.5%
Appealing	37.9%	26.2%	30.4%	62.5%	39.8%
Somewhat appealing	15.6%	0.0%	11.6%	8.3%	24.8%
Somewhat unappealing	3.1%	4.8%	0.0%	0.0%	5.3%
Unappealing	1.2%	0.0%	0.0%	0.0%	2.7%
Totally unappealing	0.4%	0.0%	0.0%	0.0%	0.9%
<b>Base</b>	<b>256</b>	<b>42</b>	<b>69</b>	<b>24</b>	<b>113</b>

Question: How generally appealing is Monterey County as a destination for meetings you typically plan.

Base: All respondents. 256 surveys completed.

# Monterey County's Appeal as a Meetings Destination (continued)

## Detail by Type of Industry

	Total	Software/ Technology	Agriculture	Education	Financial	Insurance	Manufacturing	Medical	Pharmaceutical	Telecommunications	Advertising/ Marketing	Retail	Other
<b>Very appealing</b>	41.8%	37.5%	53.1%	40.8%	36.6%	37.1%	46.5%	43.4%	37.2%	27.3%	39.3%	28.6%	53.2%
<b>Appealing</b>	37.9%	43.2%	37.5%	38.8%	45.1%	40.0%	41.9%	36.8%	48.8%	48.5%	39.3%	47.6%	31.6%
<b>Somewhat appealing</b>	15.6%	12.5%	6.3%	14.6%	16.9%	17.1%	7.0%	14.5%	7.0%	18.2%	14.3%	14.3%	11.4%
<b>Somewhat unappealing</b>	3.1%	5.7%	3.1%	4.9%	1.4%	5.7%	2.3%	3.9%	4.7%	6.1%	7.1%	4.8%	3.8%
<b>Unappealing</b>	1.2%	1.1%	0.0%	1.0%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.0%	4.8%	0.0%
<b>Totally unappealing</b>	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	2.3%	0.0%	0.0%	0.0%	0.0%
<b>Base</b>	<b>256</b>	<b>88</b>	<b>32</b>	<b>103</b>	<b>71</b>	<b>35</b>	<b>43</b>	<b>76</b>	<b>43</b>	<b>33</b>	<b>28</b>	<b>21</b>	<b>79</b>

Question: How generally appealing is Monterey County as a destination for meetings you typically plan?

Base: All respondents. 256 surveys completed.

# Monterey County's Appeal as a Meetings Destination (continued)

## Detail by Type of Planner

	Total	Corporate— Private sector businesses	Association	SMERF	Government	Non-profit— Charity	Sports groups or sporting organizations	Incentive
<b>Very appealing</b>	41.8%	38.9%	46.0%	45.8%	60.0%	53.5%	37.5%	35.9%
<b>Appealing</b>	37.9%	41.0%	37.2%	35.4%	37.1%	30.2%	50.0%	43.6%
<b>Somewhat appealing</b>	15.6%	15.3%	12.4%	12.5%	2.9%	11.6%	0.0%	15.4%
<b>Somewhat unappealing</b>	3.1%	2.8%	3.5%	6.3%	0.0%	4.7%	12.5%	5.1%
<b>Unappealing</b>	1.2%	2.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Totally unappealing</b>	0.4%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Base</b>	<b>256</b>	<b>144</b>	<b>113</b>	<b>48</b>	<b>35</b>	<b>43</b>	<b>16</b>	<b>39</b>

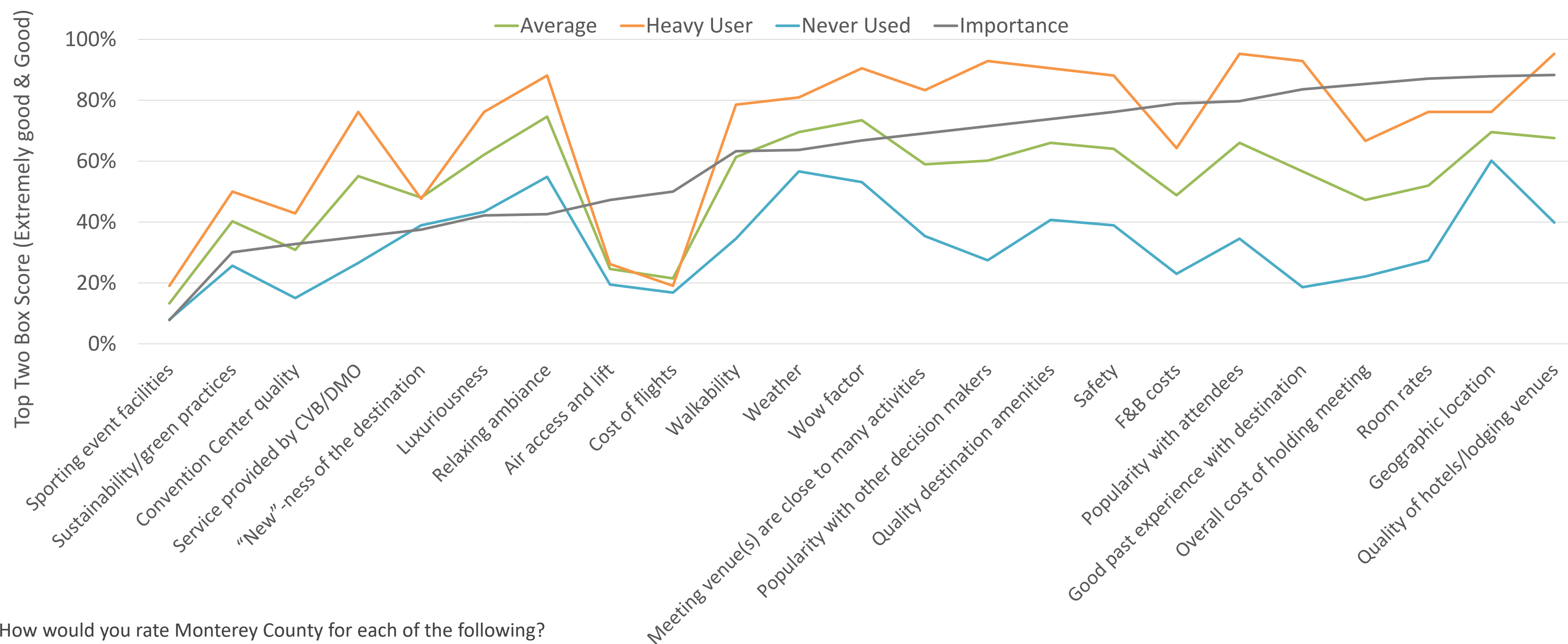
Question: How generally appealing is Monterey County as a destination for meetings you typically plan?

Base: All respondents. 256 surveys completed.

# Monterey County Attribute Ratings

**Monterey County is highest rated for its relaxing ambiance (74.6%), wow factor (73.4%), geographic location (69.5%) and weather (69.5%).** For each destination attribute tested, the chart below shows the percent of meeting planners who consider this important to how they choose the destinations to hold their meetings (gray line). When looking at factors that meeting planners found to be the most important to destination selection such as quality of accommodations, geographic location, and cost related factors, Monterey County was rated highly. Relaxation was found to be less important to meeting planners than the other factors for destination selection.

**Rating of Monterey County (TOP TWO Box Score—Extremely good & Good) – Heavy User vs. Never Used**



Question: How would you rate Monterey County for each of the following?

Base: All respondents. 256 completed surveys.

# Monterey County Ratings (continued)

**Positive perceptions of Monterey County are correlated with meeting planners' experience.** When compared to meeting planners without experience in Monterey County, Heavy Users of the destination gave Monterey County far higher ratings for destination attributes tested.

## Detail by Past Experience in Monterey County—TOP TWO BOX SCORE (Extremely good & Good)

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
Relaxing ambiance	74.6%	88.1%	91.3%	91.7%	54.9%
Wow factor	73.4%	90.5%	94.2%	79.2%	53.1%
Geographic location	69.5%	76.2%	82.6%	70.8%	60.2%
Weather	69.5%	81.0%	81.2%	75.0%	56.6%
Quality of hotels and lodging venues	67.6%	95.2%	91.3%	79.2%	39.8%
Popularity with attendees	66.0%	95.2%	92.8%	87.5%	34.5%
Quality destination amenities	66.0%	90.5%	87.0%	87.5%	40.7%
Safety	64.1%	88.1%	81.2%	95.8%	38.9%
Luxuriousness	62.1%	76.2%	79.7%	70.8%	43.4%
Walkability	61.3%	78.6%	85.5%	79.2%	34.5%
Popularity with clients/Board of Directors/other decision makers	60.2%	92.9%	89.9%	75.0%	27.4%
Meeting venue(s) are close to many activities	59.0%	83.3%	78.3%	66.7%	35.4%
Good past experience with destination	56.6%	92.9%	91.3%	83.3%	18.6%
Service provided by CVB/DMO	55.1%	76.2%	82.6%	66.7%	26.5%
Room rates	52.0%	76.2%	78.3%	54.2%	27.4%
F&B costs	48.8%	64.3%	75.4%	66.7%	23.0%
"New"-ness of the destination	48.0%	47.6%	62.3%	41.7%	38.9%
Overall cost of holding meeting in destination	47.3%	66.7%	72.5%	62.5%	22.1%
Sustainability/green practices	40.2%	50.0%	59.4%	37.5%	25.7%
Convention Center quality	30.9%	42.9%	43.5%	41.7%	15.0%
Air access and lift	24.6%	26.2%	33.3%	16.7%	19.5%
Cost of flights	21.5%	19.0%	27.5%	25.0%	16.8%
Sporting event facilities	13.3%	19.0%	17.4%	12.5%	8.0%
Relaxing ambiance	74.6%	88.1%	91.3%	91.7%	54.9%
Base	256	42	69	24	113

Question: How would you rate Monterey County for each of the following?

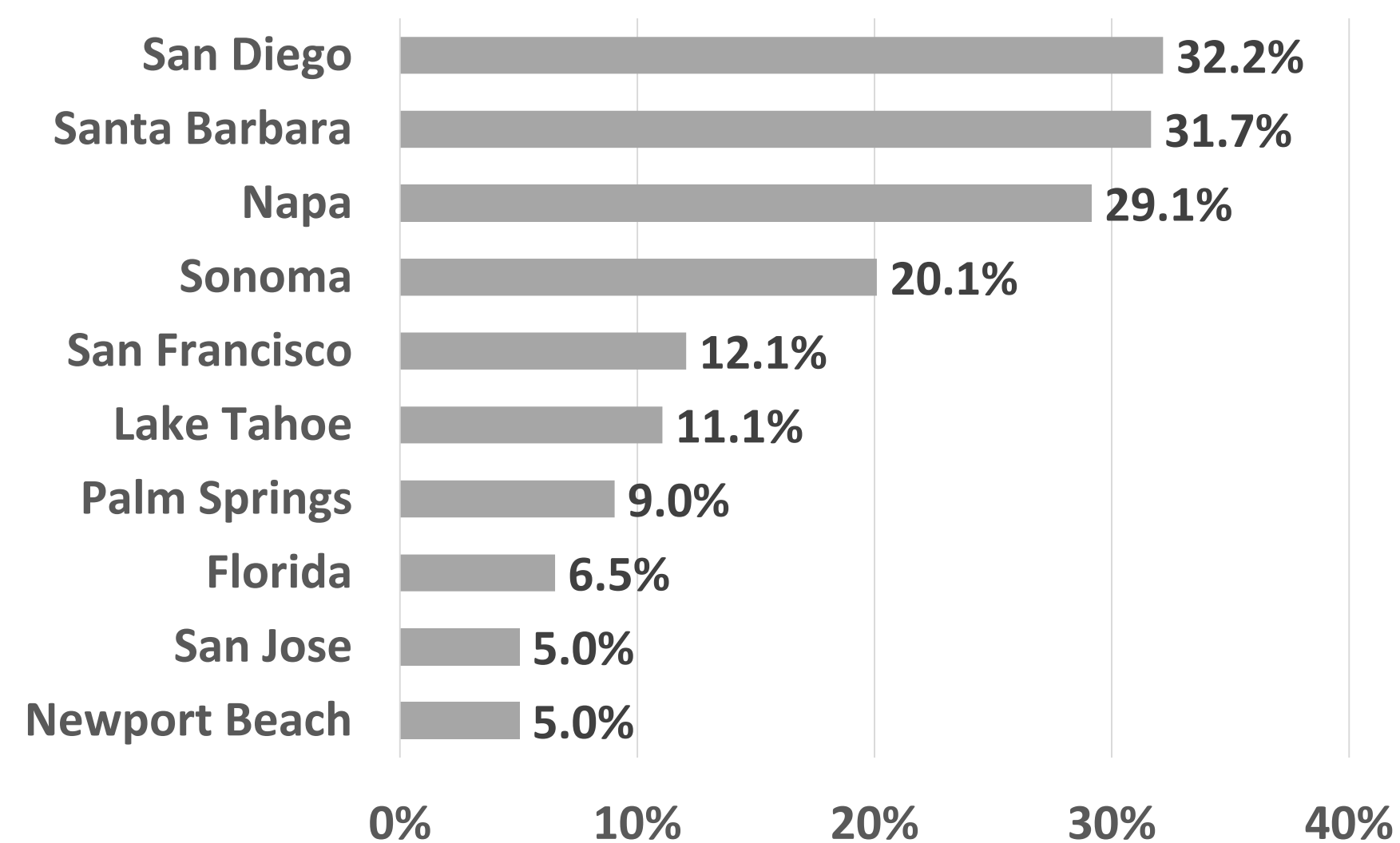
Base: All respondents. 256 completed surveys.



# Meetings Destinations Similar to Monterey County (open-ended)

**San Diego, Santa Barbara and Napa were the top destinations that meeting planners think of as similar meetings destinations to Monterey County.** In an open-ended question approximately one-third of meeting planners wrote in San Diego (32.2%), Santa Barbara (31.7%) and Napa (29.1%) as places that first came to mind as places to hold meetings similar to those in Monterey County.

**Chart 35: Meetings Destinations Similar to Monterey County**



**Detail by Past Experience Type - Table with Top 3 Similar Destinations for Each Experience Type**

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
San Diego	32.2%	23.1%	43.8%	33.3%	23.2%
Santa Barbara	31.7%	33.3%	35.9%	33.3%	29.0%
Napa	29.1%	38.5%	28.1%	14.3%	27.5%
Base	199	39	64	21	69

Question: When you think of Monterey County, what other destinations (cities, counties, regions, states, etc.) first come mind as places to hold meetings similar to those that occur or could occur in Monterey County?

Base. All respondents. 199 completed surveys.

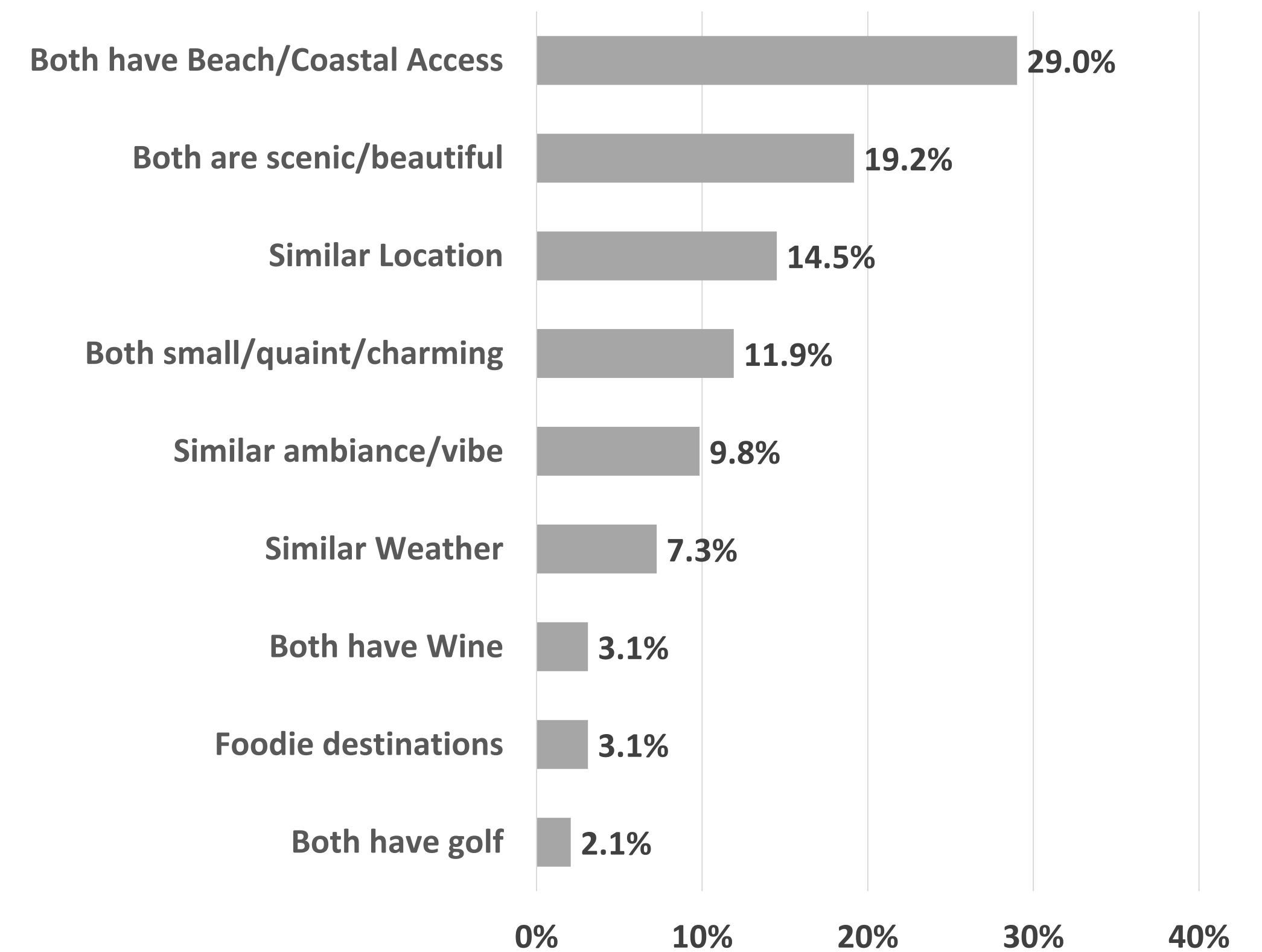
# Reasons for Viewing Competitive Destinations as Similar to Monterey County (open-ended)

Meeting planners most often cited beach and coastal access as the reason why they described cities as similar to Monterey County (29.0%) as a meetings destination. When looking at planners who wrote in San Diego, the top reason listed was that both have beach and coastal access. Those who wrote in Santa Barbara and Napa noted the similar charm and quaintness of a smaller destination.

Question: Please briefly describe why you view the destinations you listed above as similar to Monterey County as a place for meetings. Select all that apply)

Base: All respondents. 193 completed surveys.

Chart 36: Reasons for Viewing Competitive Destinations as Similar to Monterey County

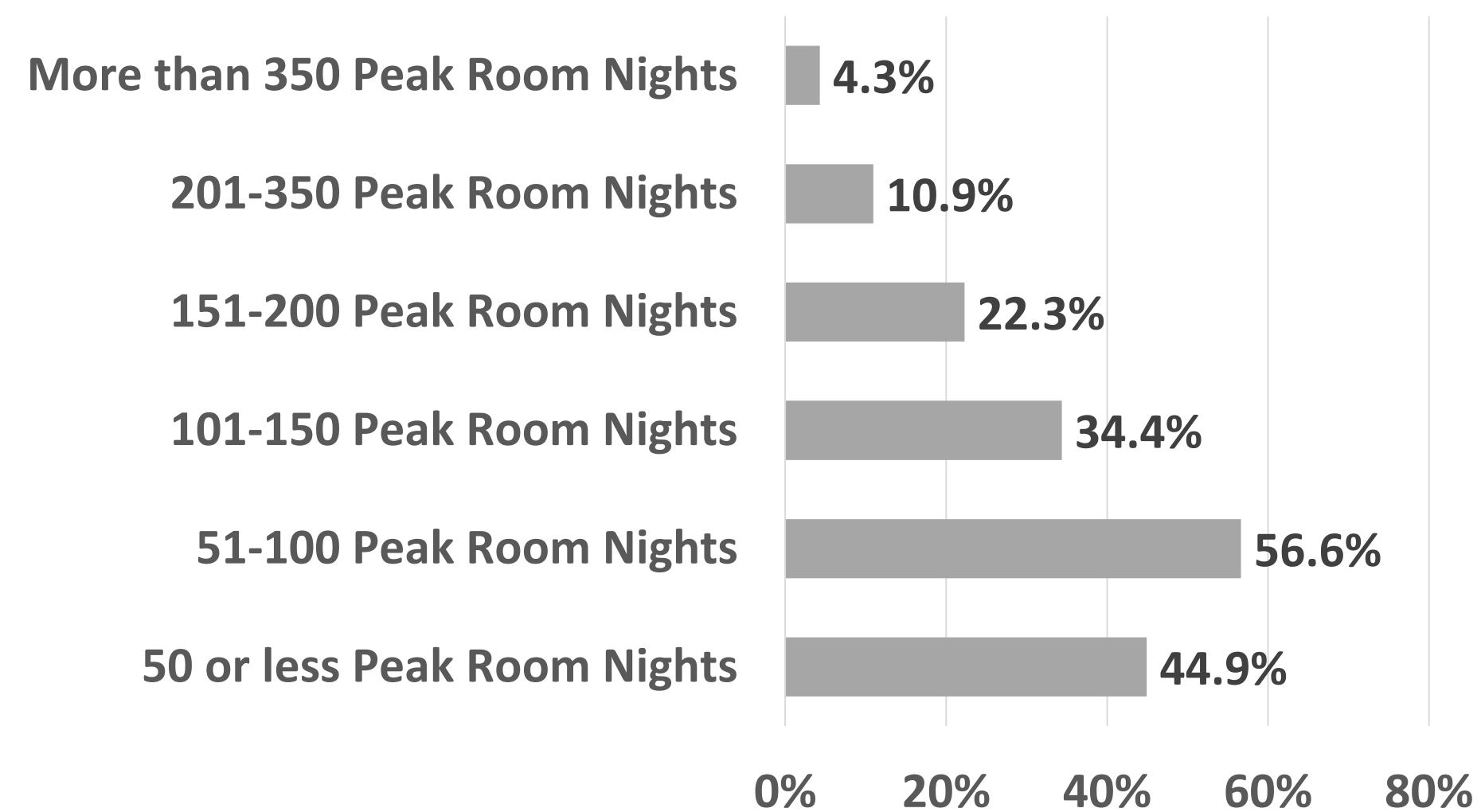


(% of respondents)

# Ideal Meeting Sizes for Monterey County

Meeting planners tend to perceive Monterey County as an ideal meetings destination for smaller meetings. Over one half said that Monterey County is ideal for meetings of 51 to 100 peak room nights (56.6%). Approximately 45 percent think that it is deal for meetings with 50 or less peak room nights (44.9%). Although Heavy Users are likelier to view Monterey County as more diverse in the meetings sizes it is ideal to host, the strong majority of this group perceives the destination as best for smaller meetings.

**Chart 37: Ideal Meeting Sizes for Monterey County**



**Detail by Past Experience in Monterey County**

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
More than 350 Peak Room Nights	4.3%	11.9%	4.3%	8.3%	0.0%
201-350 Peak Room Nights	10.9%	19.0%	13.0%	20.8%	4.4%
151-200 Peak Room Nights	22.3%	35.7%	33.3%	20.8%	10.6%
101-150 Peak Room Nights	34.4%	50.0%	40.6%	20.8%	25.7%
51-100 Peak Room Nights	56.6%	61.9%	56.5%	66.7%	53.1%
50 or less Peak Room Nights	44.9%	57.1%	43.5%	41.7%	40.7%
<b>Base</b>	<b>256</b>	<b>42</b>	<b>69</b>	<b>24</b>	<b>113</b>

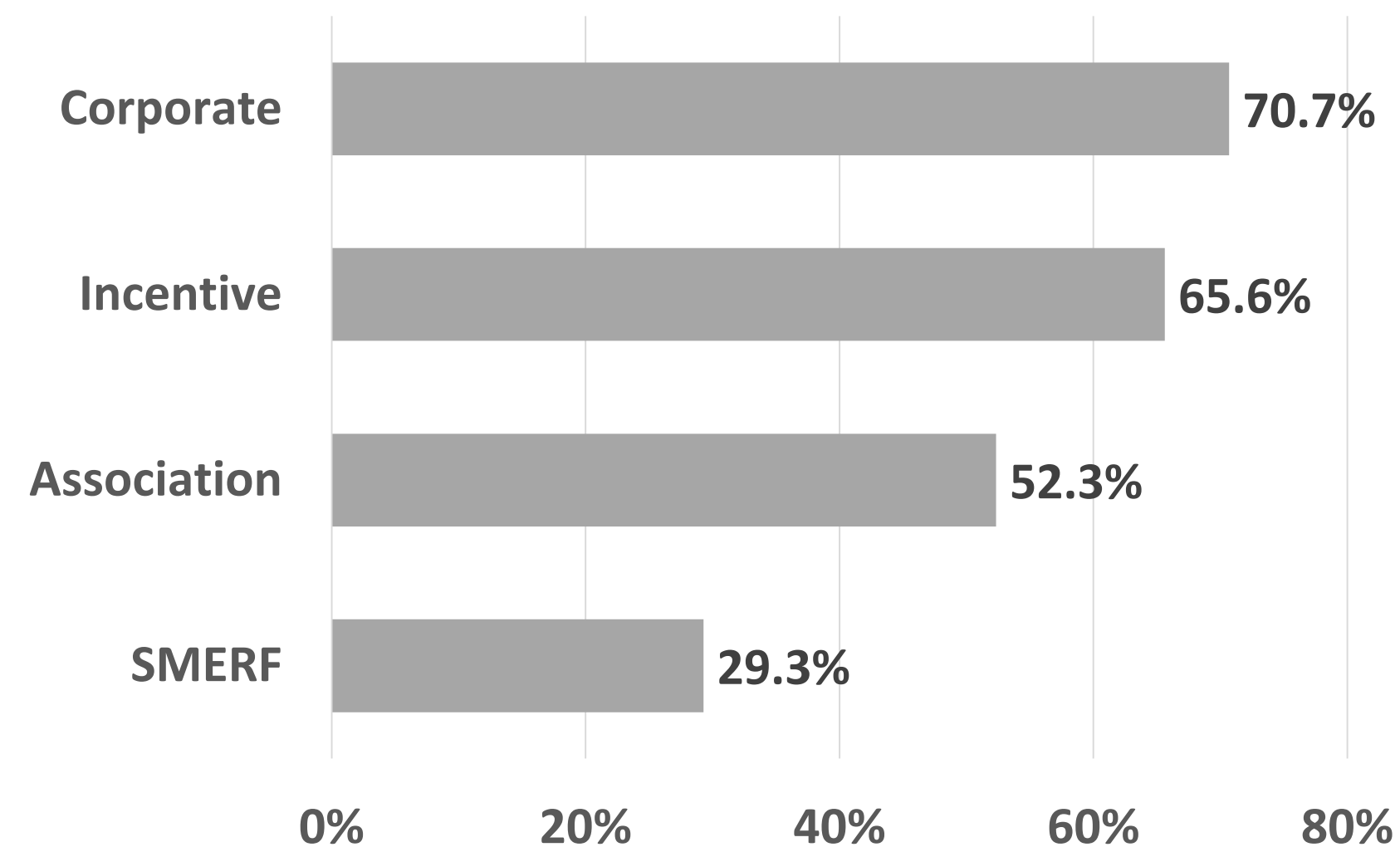
Question: In terms of peak room nights, which size meetings do you think Monterey County is ideal for? (Select all that apply)

Base: All respondents. 256 completed surveys.

# Ideal Meeting Organization Type for Monterey County

Meeting planners also tend to view Monterey County as an ideal fit for Corporate (70.7%) and Incentive (65.6%) meetings, although those experienced with the destination also widely see it as a fit for Association meetings. While those who have never used Monterey County as a meetings destination do not perceive Monterey County to be a good fit for SMERF (22.1%) or Association meetings (37.2%), Heavy and Moderate Users of Monterey County reported viewing it as an ideal destination for all types of meetings, albeit with less agreement on meetings for SMERF organizations.

**Chart 38: Ideal Meeting Organization Types for Monterey County**



**Detail by Past Experience in Monterey County**

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
Corporate	70.7%	76.2%	75.4%	62.5%	66.4%
Incentive	65.6%	66.7%	66.7%	66.7%	64.6%
Association	52.3%	71.4%	62.3%	66.7%	37.2%
SMERF	29.3%	42.9%	37.7%	25.0%	22.1%
Base	256	42	69	24	113

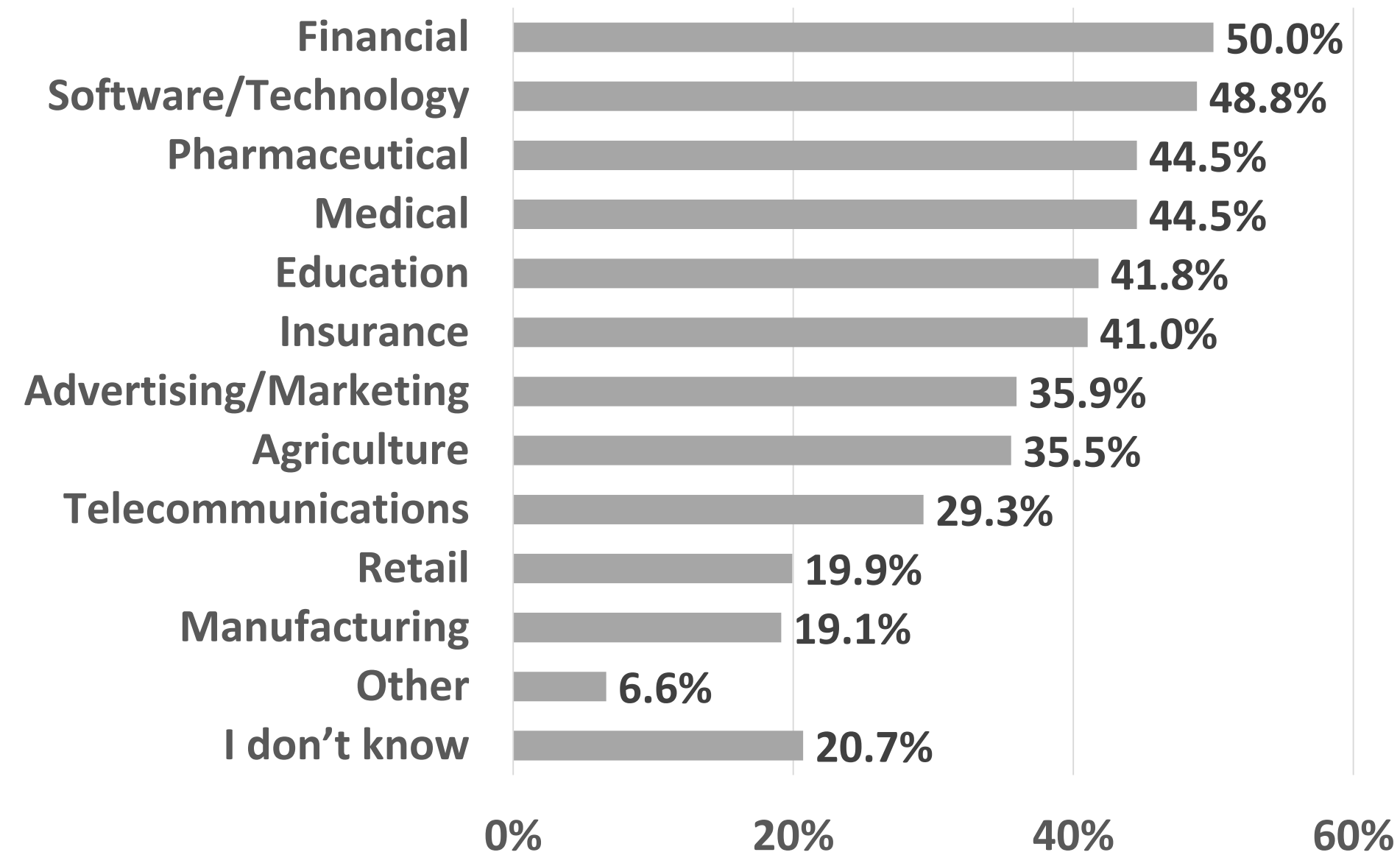
Question: Which of the following types of organizations is Monterey County an ideal meetings destination for? (Select all that apply)

Base: All respondents. 256 completed surveys.

# Ideal Meeting Industries for Monterey County

Monterey County is regarded by many meeting planners to be an ideal meetings destination for **Financial (50.0%)**, **Software/Technology (48.8%)**, **Pharmaceutical (44.5%)** and **Medical industries (44.5%)**. Meeting planners view Retail and Manufacturing industries to be less of an ideal match for the area’s meetings assets with one-in-five selecting those industries.

**Chart 39: Ideal Meeting Industries for Monterey County**



**Detail by Past Experience in Monterey County**

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
Financial	50.0%	59.5%	53.6%	45.8%	45.1%
Software/Technology	48.8%	47.6%	50.7%	54.2%	45.1%
Medical	44.5%	52.4%	49.3%	45.8%	36.3%
Pharmaceutical	44.5%	57.1%	43.5%	45.8%	38.1%
Education	41.8%	61.9%	42.0%	50.0%	31.0%
Insurance	41.0%	52.4%	44.9%	41.7%	33.6%
Advertising/Marketing	35.9%	38.1%	39.1%	41.7%	31.9%
Agriculture	35.5%	61.9%	40.6%	37.5%	23.0%
Telecommunications	29.3%	31.0%	36.2%	37.5%	21.2%
Retail	19.9%	28.6%	27.5%	12.5%	13.3%
Manufacturing	19.1%	21.4%	29.0%	12.5%	13.3%
Other	6.6%	7.1%	13.0%	4.2%	3.5%
I don't know	20.7%	14.3%	20.3%	4.2%	26.5%
<b>Base</b>	<b>256</b>	<b>42</b>	<b>69</b>	<b>24</b>	<b>113</b>

Question: Which of the following industries do you think Monterey County is an ideal meetings destination for? (Select all that apply)

Base: All respondents. 256 completed surveys.

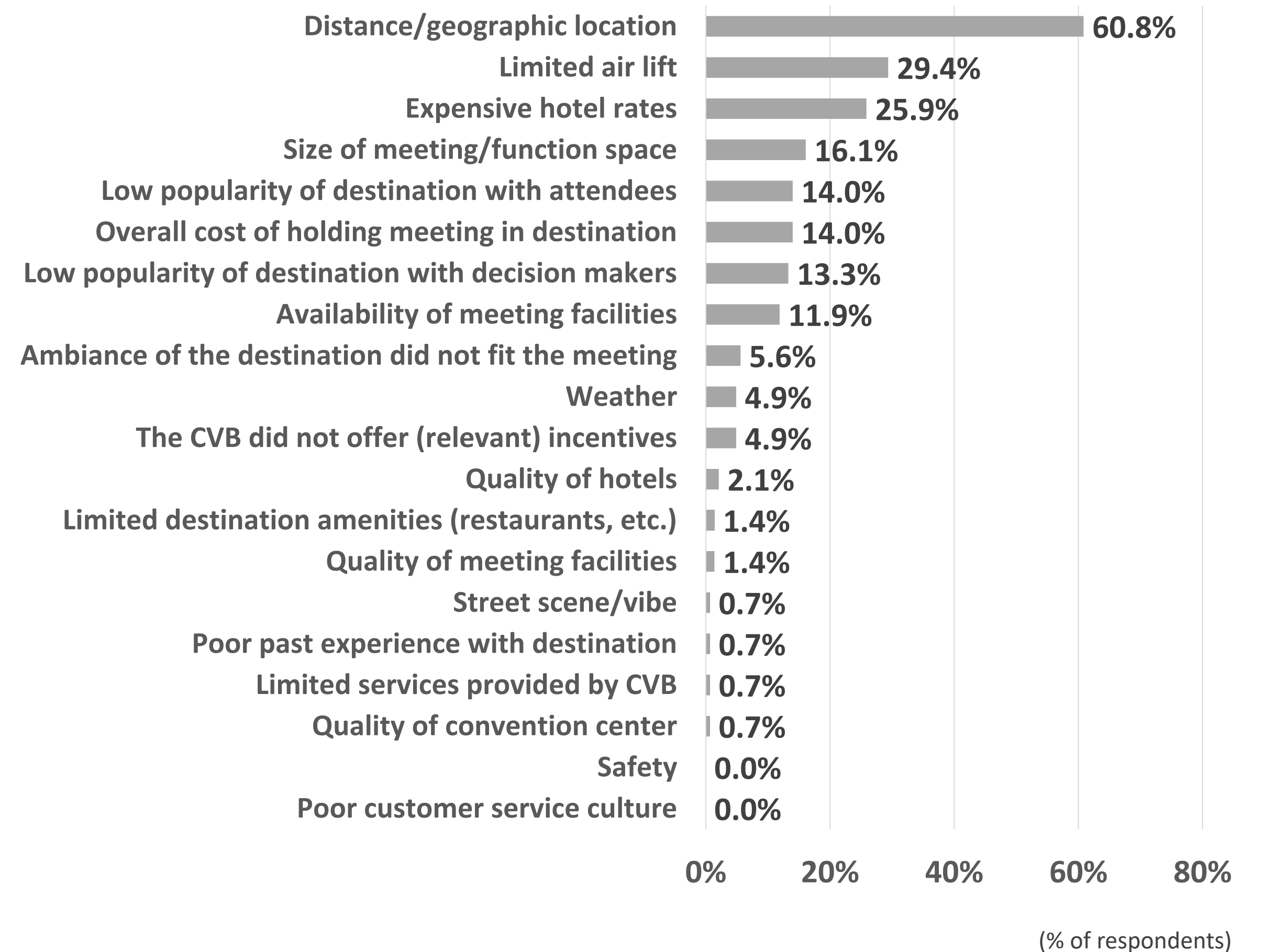
# Reasons for Not Selecting Monterey County as a Meetings Destination in the Past Five Years

The top reasons planners listed for not selecting Monterey County as a meetings destination in the past five years were distance and geographic location. Sixty percent of planners who have not planned a meeting in Monterey County in the past five years selected this reason from an aided list (60.8%). Other top reasons for not selecting Monterey County were limited air lift (29.4%) and expensive hotel rates (25.9%). Nearly five percent said their reason was due to the CVB not offering relevant incentives (4.9%) and less than one percent cited limited services provided by the CVB (0.7%). Infrequent or Historic Users have a higher percentage than those who have never used Monterey County of giving the reasons of limited air lift (41.7% vs. 25.7%, respectively) and expensive hotel rates (45.8% vs. 20.4%, respectively).

Question: Which of the following describe why you have not selected Monterey County as a meetings destination in the past five years? (Select all that apply)

Base: Respondents who have not planned a meeting in Monterey County in the past five years. 143 completed surveys.

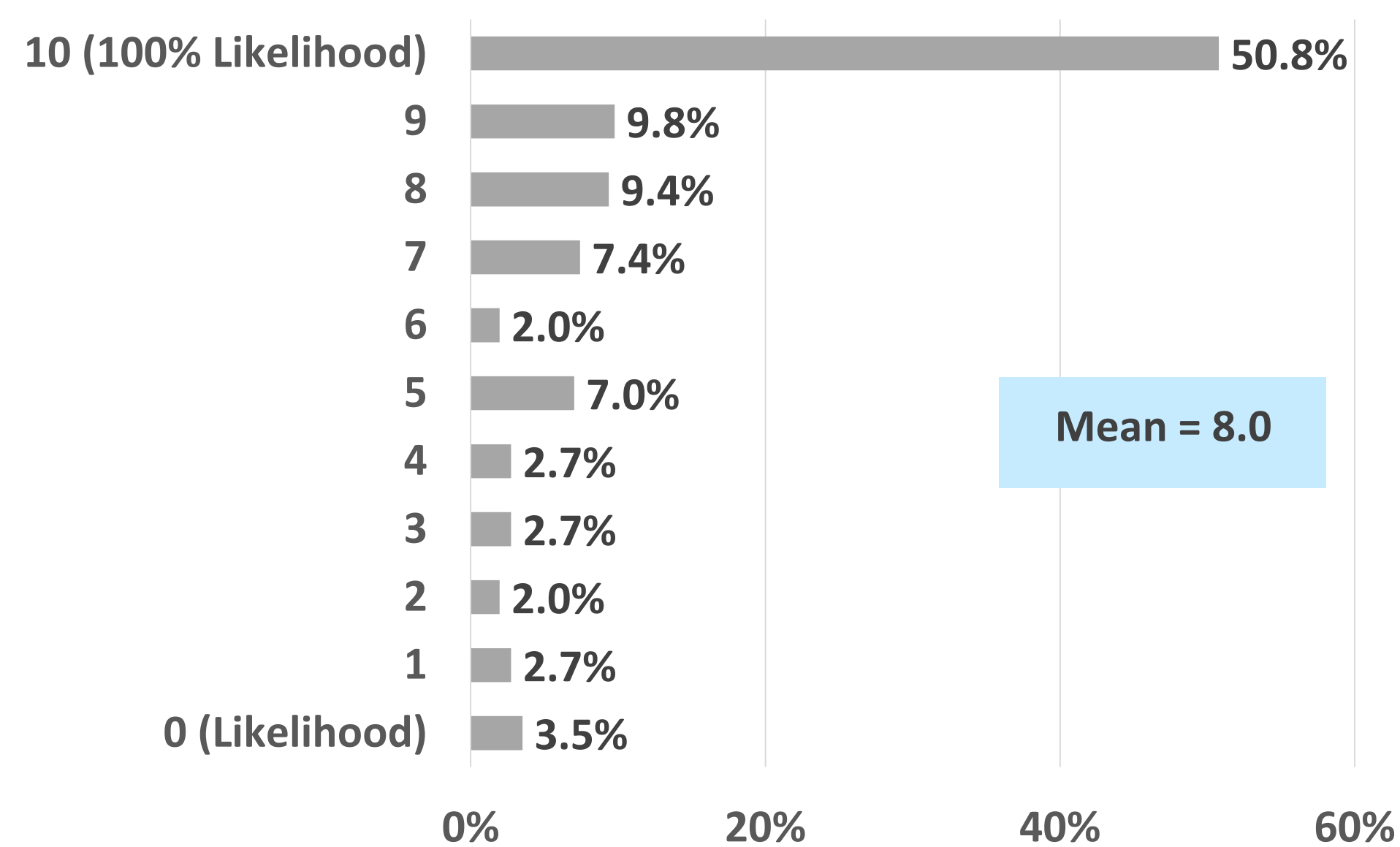
**Chart 40: Reasons for Not Selecting Monterey County as a Meetings Destination in the Past Five Years**



# Likelihood of Reaching Out to the MCCVB

One half of meeting planners would be certain to contact the Monterey County CVB for assistance if they were to plan a meeting in the county. On a scale between 1 to 10 with 1 being a “Zero likelihood” and 10 being a “100% likelihood” meeting planners rated their likelihood of reaching out to the Monterey County CVB for assistance should they plan a meeting in the area. Approximately seventy percent of Heavy Users are certain they would contact the CVB (71.4%). Over half of those that had never planned a meeting in Monterey County said they had a strong likelihood to contact the CVB if they were to plan a meeting there (rating their likelihood of reaching out to the MCCVB an 8, 9 or 10 on a 10-point scale).

**Chart 41: Likelihood of Reaching Out to the MCCVB**



Question: If you were to plan a meeting in Monterey County, how likely would you be to reach out to the Monterey County CVB for assistance?

Base: All respondents. 256 completed surveys.

**Detail by Type of Visitor**

	Total	Heavy Users	Moderate Users	Infrequent or Historic Users	Never Used
<b>10 – 100% Likelihood</b>	50.8%	71.4%	59.4%	66.7%	33.6%
9	9.8%	9.5%	8.7%	8.3%	10.6%
8	9.4%	2.4%	11.6%	0.0%	12.4%
7	7.4%	4.8%	1.4%	8.3%	11.5%
6	2.0%	0.0%	0.0%	4.2%	3.5%
5	7.0%	2.4%	5.8%	12.5%	8.8%
4	2.7%	2.4%	2.9%	0.0%	3.5%
3	2.7%	2.4%	2.9%	0.0%	3.5%
2	2.0%	2.4%	2.9%	0.0%	1.8%
1	2.7%	0.0%	1.4%	0.0%	5.3%
<b>0 – 0% Likelihood</b>	3.5%	2.4%	2.9%	0.0%	5.3%
<b>Mean</b>	<b>8.0</b>	<b>8.9</b>	<b>8.3</b>	<b>8.9</b>	<b>7.1</b>
<b>Base</b>	<b>256</b>	<b>42</b>	<b>69</b>	<b>24</b>	<b>113</b>



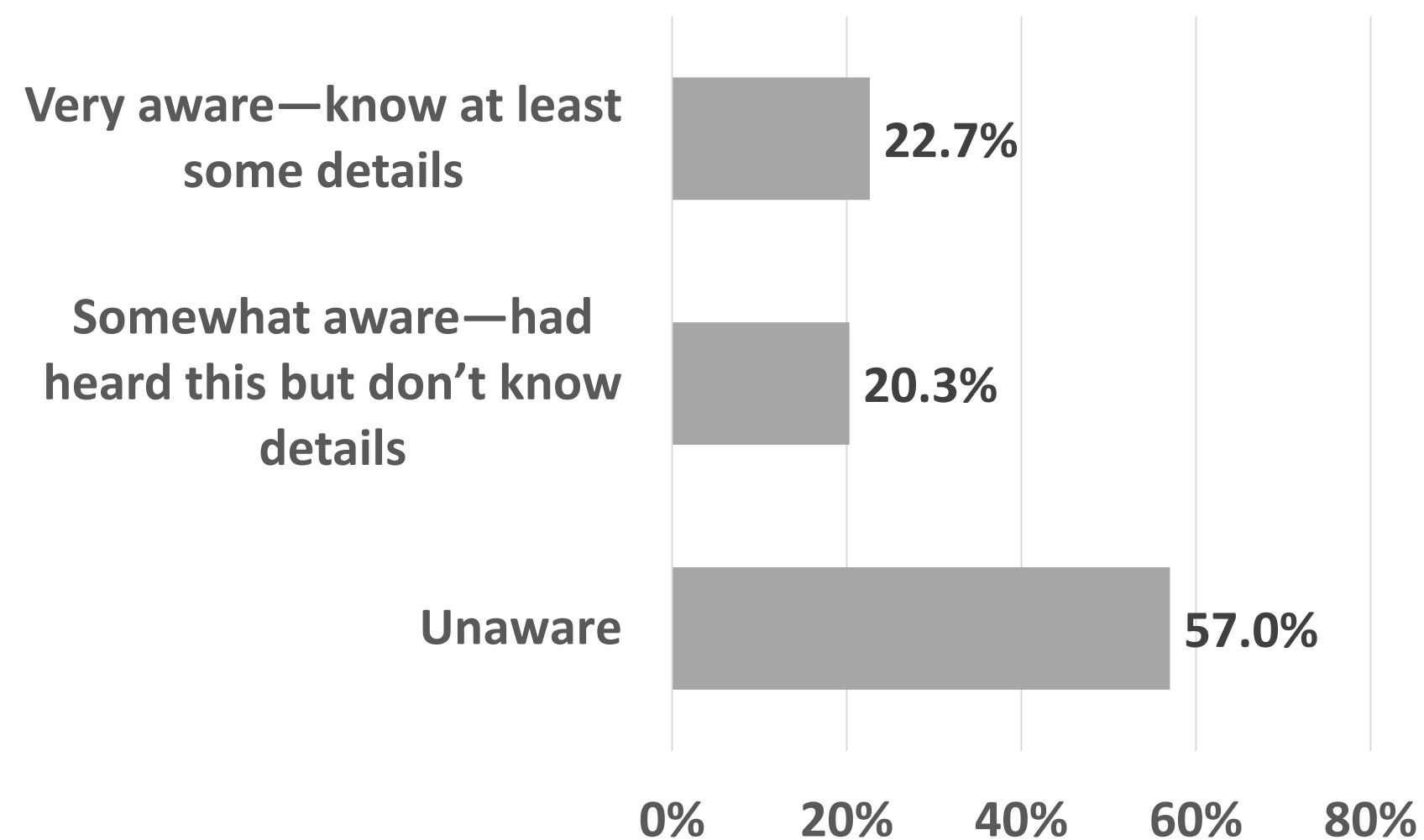
MONTEREY CONVENTION CENTER  
RENOVATION AWARENESS  
& PERCEPTION



# Awareness of Monterey County Conference Center Renovation

**Over half of Convention Center Users have some level of awareness of the renovation of the Monterey County Conference Center.** Amongst Convention Center Users, 26.5 percent reported that they were “Somewhat aware” and 27.9 percent were “Very aware” of the Monterey County Conference Center renovation (54.4%). With 45.6 percent of Convention Center Users who were “Unaware,” there is an opportunity to build awareness of the renovation amongst this segment. In looking at all meeting planners surveyed, 43.0 percent were “Somewhat aware” (19.3%) or “Very aware” (21.6%) of the renovation. A slightly smaller proportion of Non-Convention Center Users, 40.9 percent, reported some level of awareness.

**Chart 42: Awareness of Monterey County Conference Center Renovation (Total)**



Question: Which best describes your awareness of the renovation of the Monterey County Conference Center, set to reopen in Spring 2017? (Select one)

Base: All respondents. 256 completed surveys

**Detail by Convention Center Usage\***

	Total	Convention Center Users	Non-Convention Center Users
Very aware—know at least some details	22.7%	27.9%	21.6%
Somewhat aware—had heard this but don't know details	20.3%	26.5%	19.3%
Unaware	57.0%	45.6%	59.1%
<b>Base</b>	<b>256</b>	<b>68</b>	<b>171</b>

\*Respondents who gave “Convention Center Available” a rating of “Extremely High Importance” or “High Importance” as a factor in destination selection (see page 16) are considered “Convention Center Users” all other respondents are considered “Non-Convention Center users.”

# Monterey County Conference Center Renovation's Effect on Interest

**Nearly 60 percent of Convention Center Users are more interested in Monterey County as a meetings destination due to the Monterey County Conference Center renovation.**

Of these Convention Center Users, 23.5 percent reported that they were “Somewhat more interested” and 33.8 percent were “Much more interested” in Monterey County as a meetings destination as a result of the renovated Monterey County Conference Center (57.3%). Meanwhile 46.1 percent of all meeting planners surveyed and 42.1 percent of Non-Convention Center Users reported that the renovation made them “Somewhat more interested” or “Much more interested” in Monterey County as a destination for meetings that they plan.

## Detail by Convention Center Usage\*

	Total	Convention Center Users	Non-Convention Center Users
Makes me much more interested in Monterey County	17.2%	23.5%	14.6%
Makes me somewhat more interested in Monterey County	28.9%	33.8%	27.5%
Neutral—does not make me more or less interested in Monterey County	39.5%	32.4%	42.1%
Makes me somewhat less interested in Monterey County	0.4%	1.5%	0.0%
Makes me much less interested in Monterey County	0.0%	0.0%	0.0%
Not applicable	14.1%	8.8%	15.8%
<b>Base</b>	<b>256</b>	<b>68</b>	<b>171</b>

\*Respondents who gave “Convention Center Available” a rating of “Extremely High Importance” or “High Importance” as a factor in destination selection (see page 16) are considered “Convention Center Users” all other respondents are considered “Non-Convention Center Users.”

Question: How does the renovated Monterey County Conference Center affect your interest in Monterey County as a destination for meetings you are responsible for?

Base: All respondents. 256 completed surveys.