

Ad & Communications
Research

FY17-18 Midyear
Research

January 2018

 **insights**
Strategic Marketing and Research

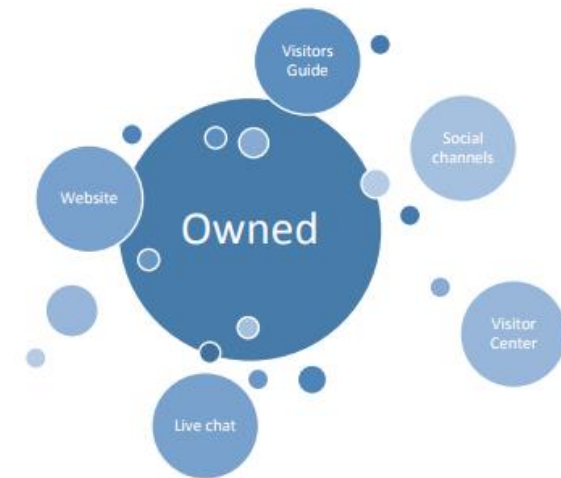
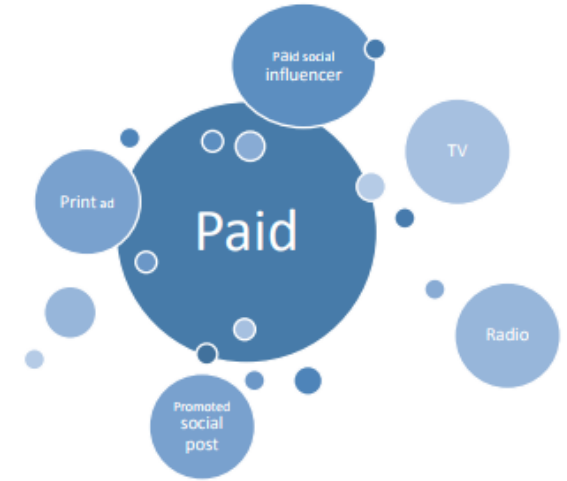
MONTEREY
Grab life by the moments.™

Insights

- The current content marketing strategy continues to work well for Monterey County Convention & Visitors Bureau (MCCVB), with more than half of regional travelers aware of some element of the paid or earned media. Awareness continues to grow on the national scene as well.
- The marketing influenced significant gains in both market groups in terms of familiarity with the destination, its brand identity, visit interest, and actual visitation.
- The paid advertising continues to pay dividends to the community. Q1 and Q2 advertising investment brought \$113 million in visitor spending to the county. While this is lower than last midyear, it was accomplished with less ad investment. The weather-related temporary closures to some parts of the county likely impacted public perceptions of what was still open to visitors.
- The data indicate that a brand refresh might be in order. While awareness continues to be strong, in both regional and national markets the creative ratings continued to slide, which suggests wear-out.

Background & Objectives

- This research is the midyear tracking measure of MCCVB’s marketing efforts, which reflect the reach and impact of the Grab Life by the Moments campaign, initiated in fall 2013 as a traditional paid advertising campaign. In recent years, MCCVB has been transitioning to “content marketing,” a cutting-edge effort to integrate and synergize paid media, earned media, and owned channels such as social media properties and the website.
- The survey research conducted here provides an important contextual component to the myriad real-time digital data points. Specific objectives of this research are to:
 - Compare current results to established benchmarks
 - Measure strength of the creative
 - Evaluate the campaign’s effectiveness at generating visits
 - Review visitor/trip specifics and related marketing implications
 - Estimate ad-influenced travel and associated travel revenue
 - Explore the overlap between paid ads and PR
 - Provide conclusions and recommendations to help inform MCCVB’s marketing efforts

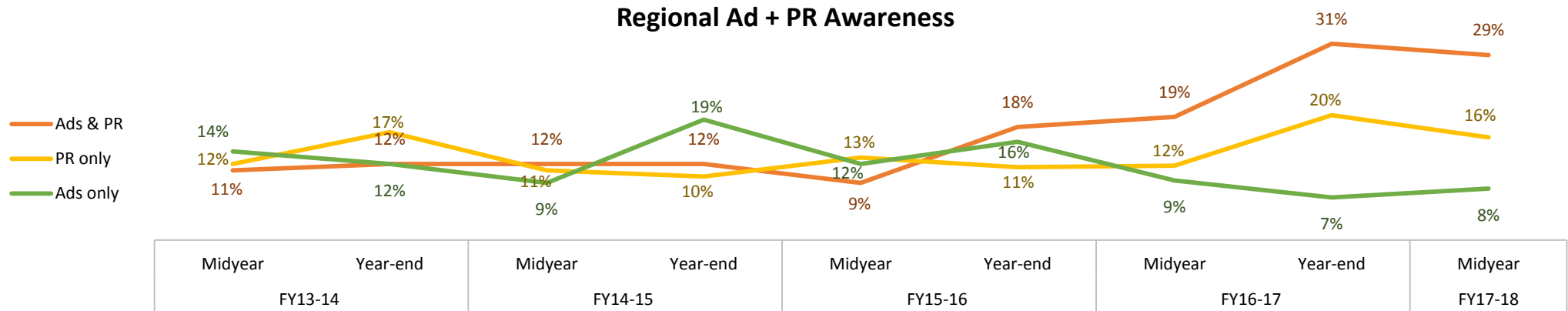


Grab Life By the Moments Campaign

- Launched in 2013, MCCVB’s brand campaign, Grab Life By the Moments, has successfully leveraged beautiful images of Monterey County assets in its print, email, digital banner, and social media advertisements.
- Each seasonal campaign introduced refreshed creative – and the most recent campaign included “Fall Speed Ahead” executions – but the brand campaign’s general layout has been the same and many of the images have been used multiple times and across media, as shown below in the examples of creative executions.
- This helps build awareness – the familiar images cut through the clutter with travelers, and consistency over time helps the messaging permeate the target markets. However, this strategy also means it can be difficult to isolate the impacts of the current campaign from the impacts of those that came before.

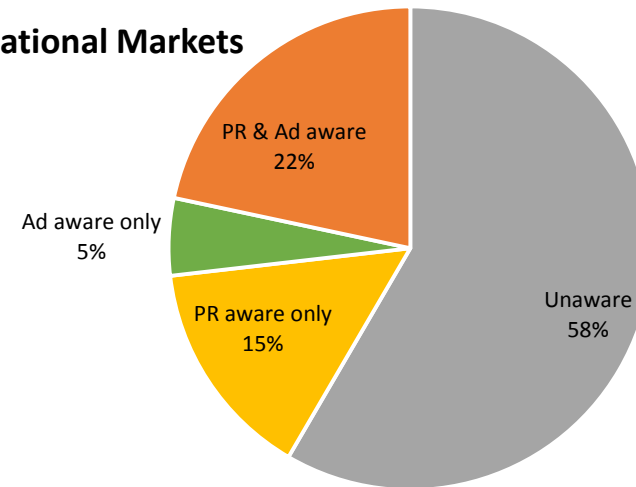


The effectiveness of MCCVB’s Content Marketing strategy shows in continued high awareness of both paid ads and PR.

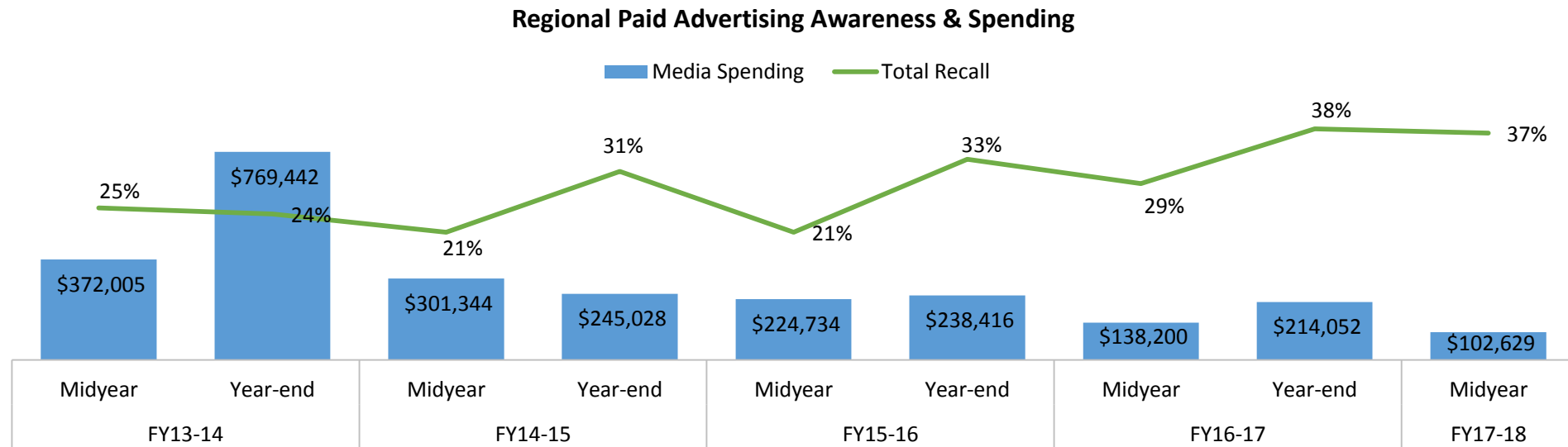


- Advertising awareness = aided recall of:
 - Print
 - Email
 - Digital banners
 - Social media
- PR awareness = aided recall of:
 - Native ads
 - Influencer blogs
 - Unaided recall of news stories, articles or feature stories about Monterey County destinations

Awareness in National Markets

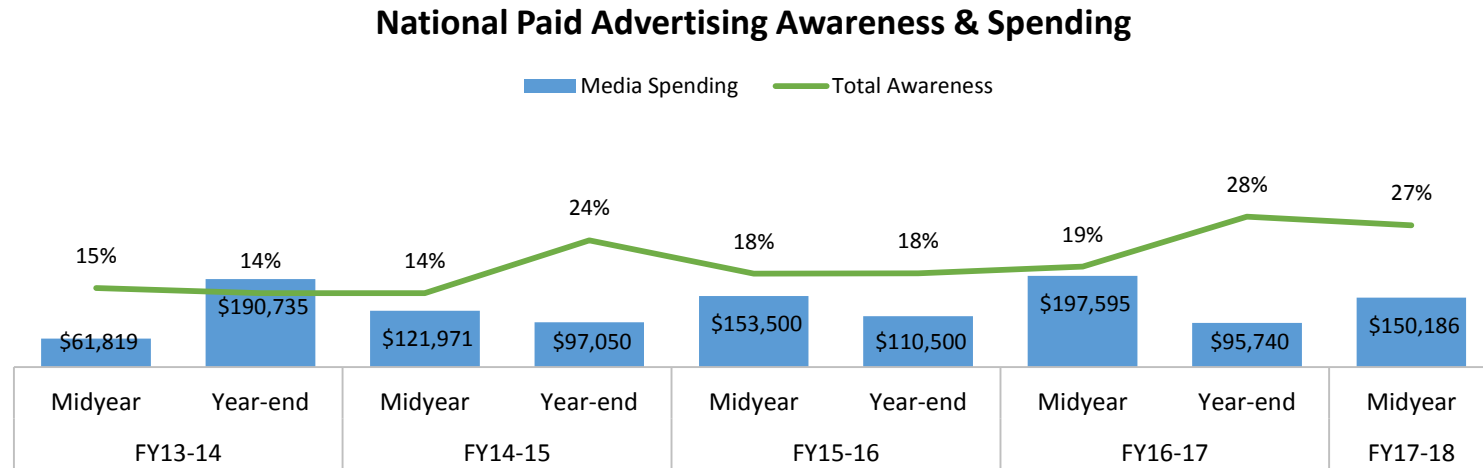


This is MCCVB's most efficient campaign to date. Regional recall remained high despite half the spending of last year-end.



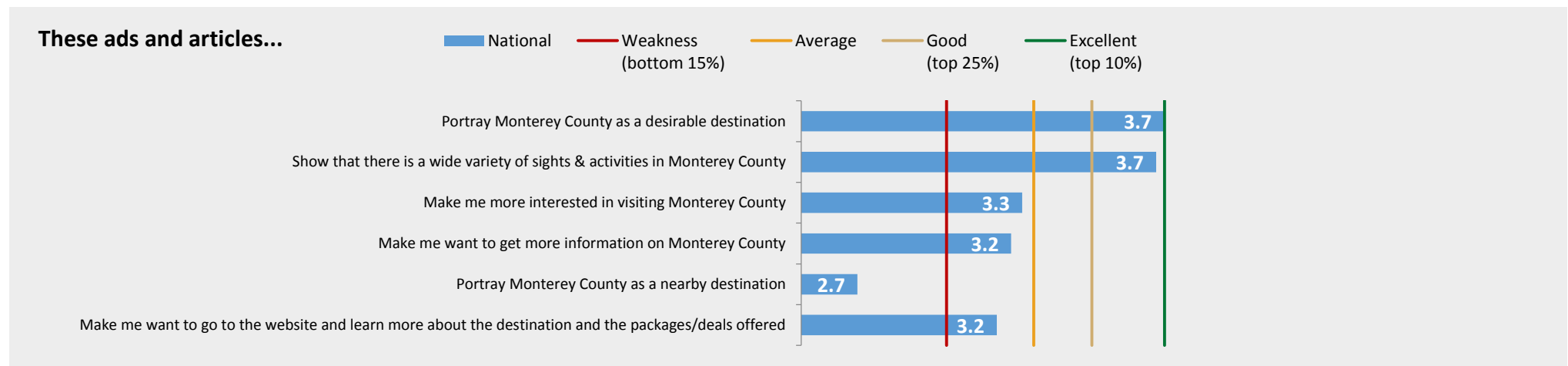
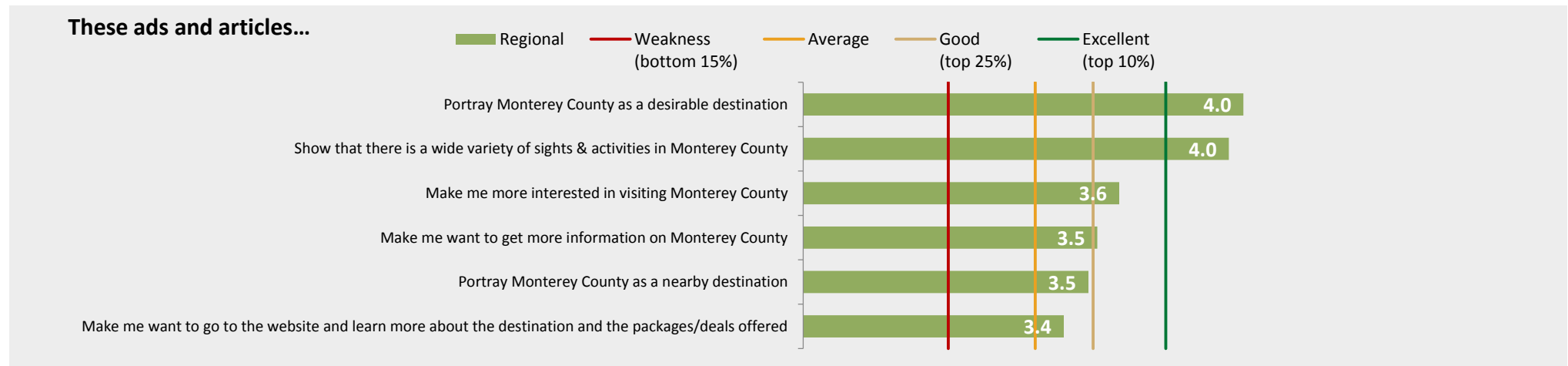
Aware HH	3.5 M	3.3 M	3.0 M	4.5 M	3.0 M	4.8 M	4.1 M	5.4 M	4.6 M
Cost per aware HH	\$0.11	\$0.23	\$0.10	\$0.05	\$0.07	\$0.05	\$0.03	\$0.04	\$0.02

The higher investment in national markets is keeping ad awareness above 25% in these farther markets.

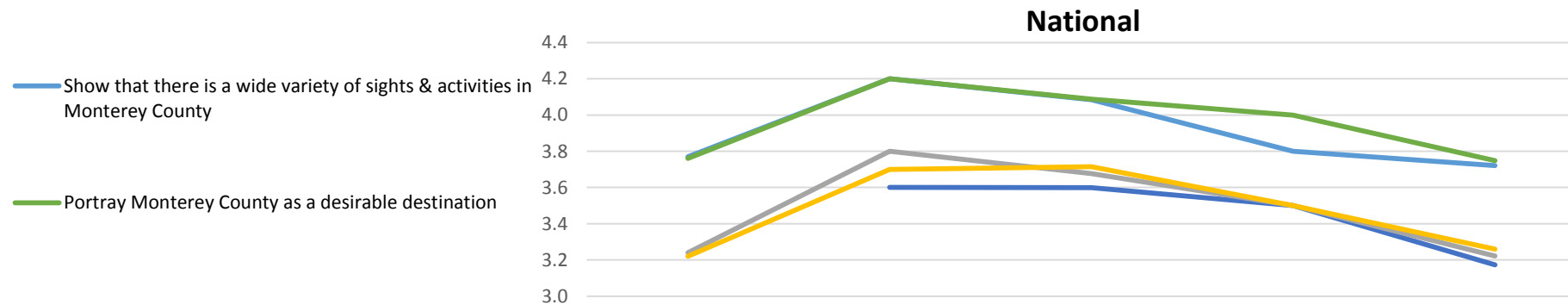
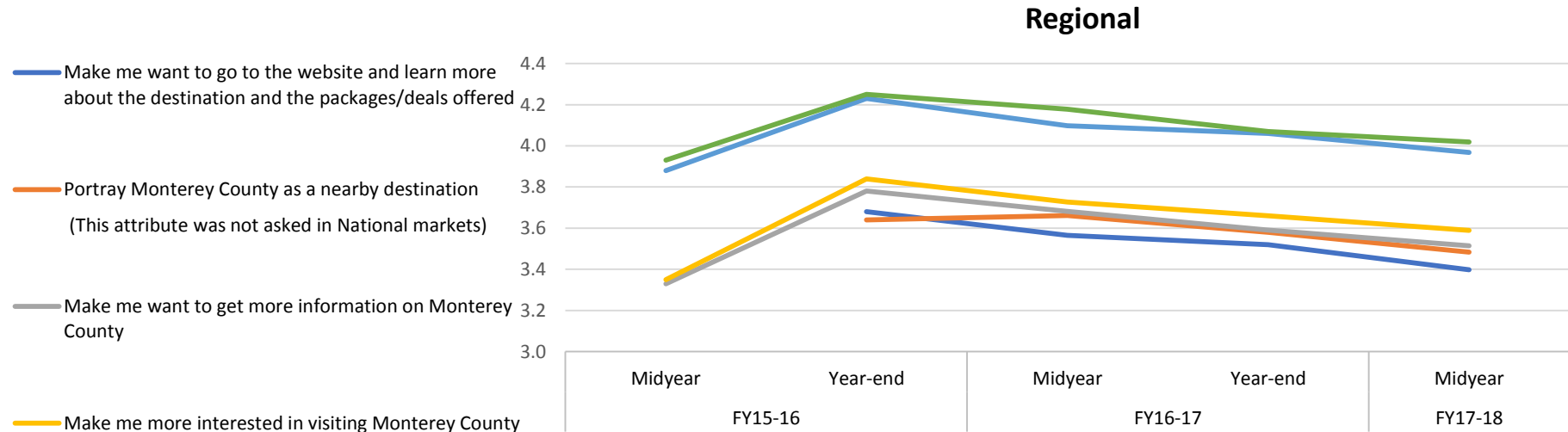


- In support of its goal to reach out to new, more distant markets to expand visit potential to the county, MCCVB invested more in the national markets than regional. With this level of reach, the paid advertising is laying the groundwork for future visits.

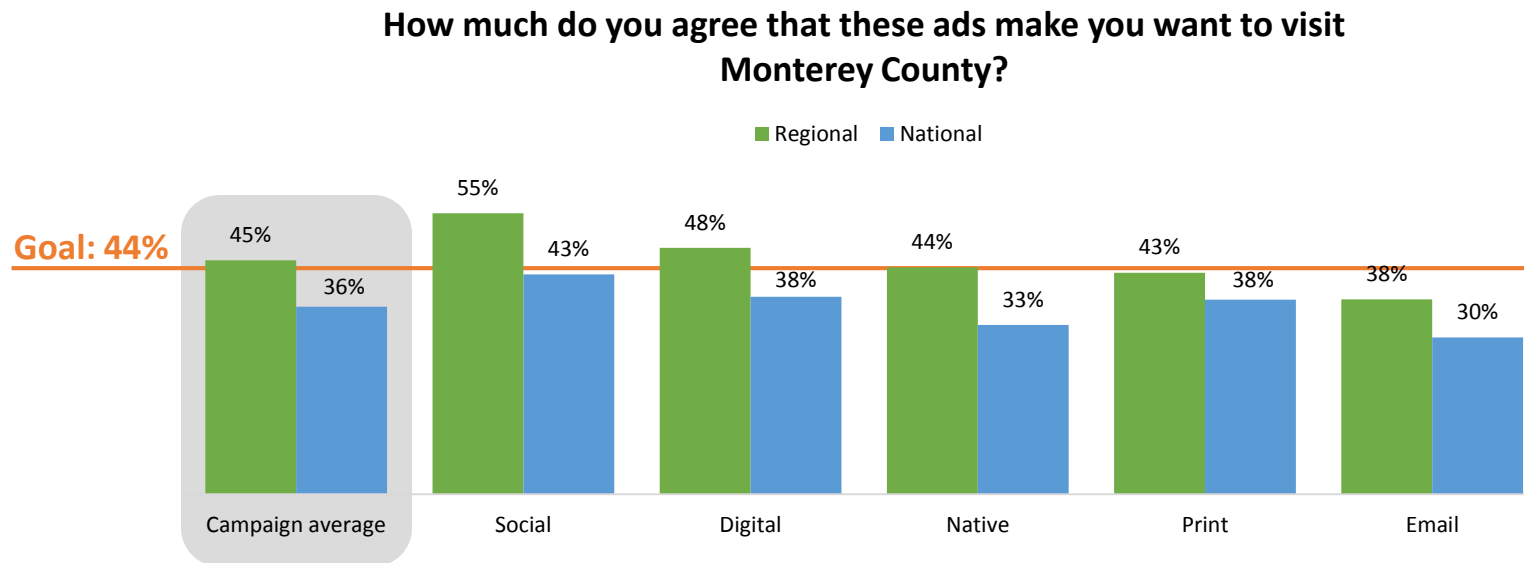
The ads are strongest at showing Monterey County as a desirable destination with a variety of sights + activities.



In both market groups, creative ratings have slowly declined over time, indicating wear-out of the creative.



45% of regional travelers and 36% of national travelers agree that the campaign makes them want to visit Monterey County

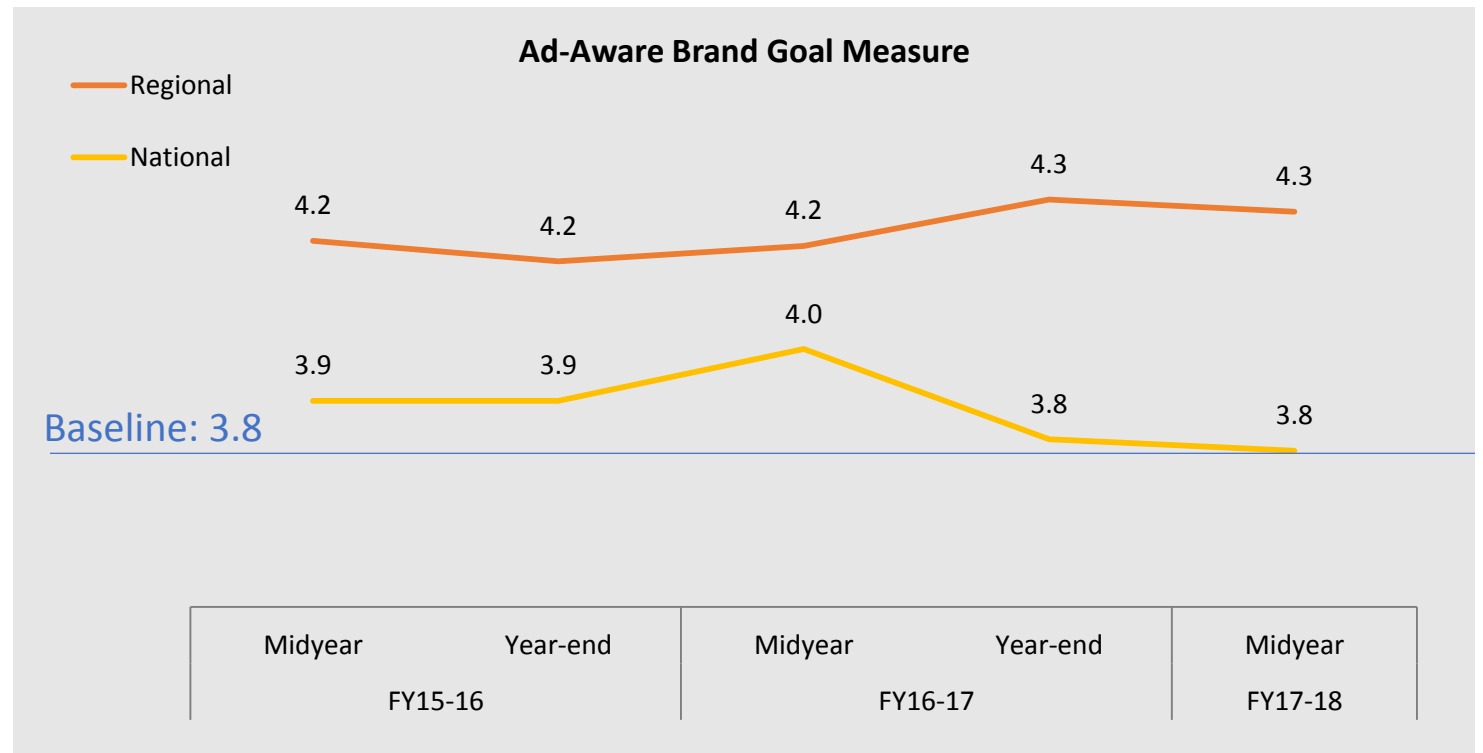
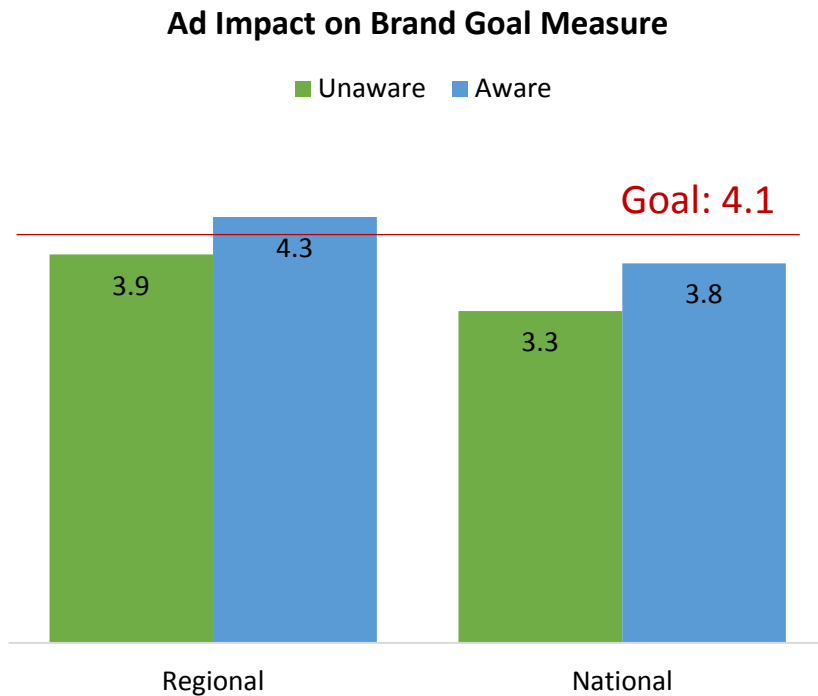


- In addition to rating key messaging, travelers were asked to rate the ads on how much they made them want to visit Monterey County. Like ad ratings, it was asked of all respondents whether they had seen the ads before or not. The question was asked by medium.

Impact of the Advertising

MCCVB Ad & Communications Research —FY17-18 Midyear

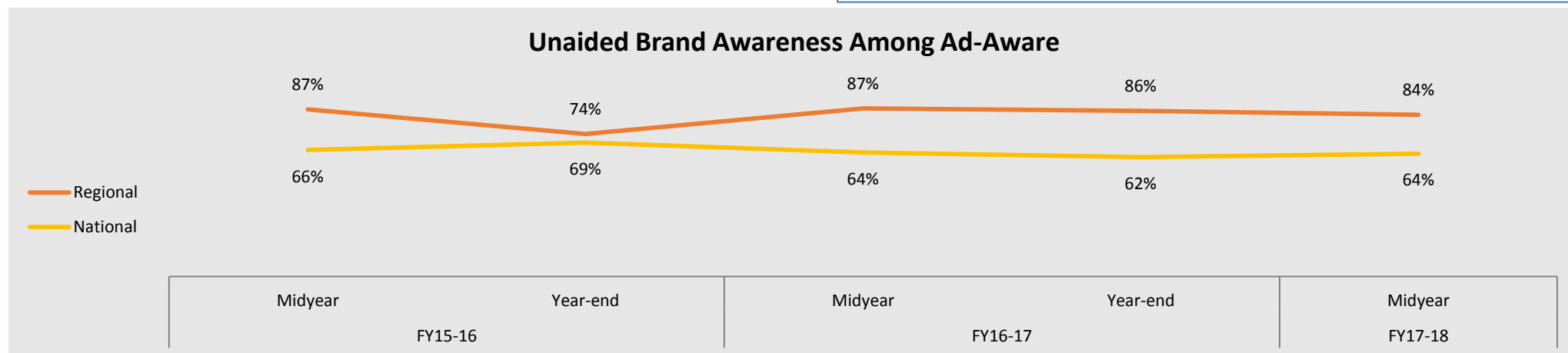
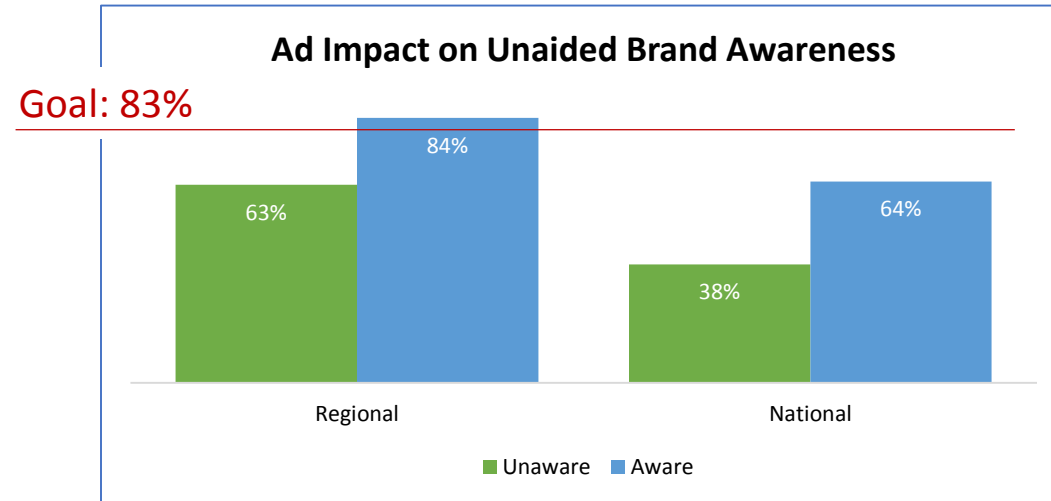
MCCVB's ads again boost the brand measure above the goal in regional markets. National markets are at the baseline.



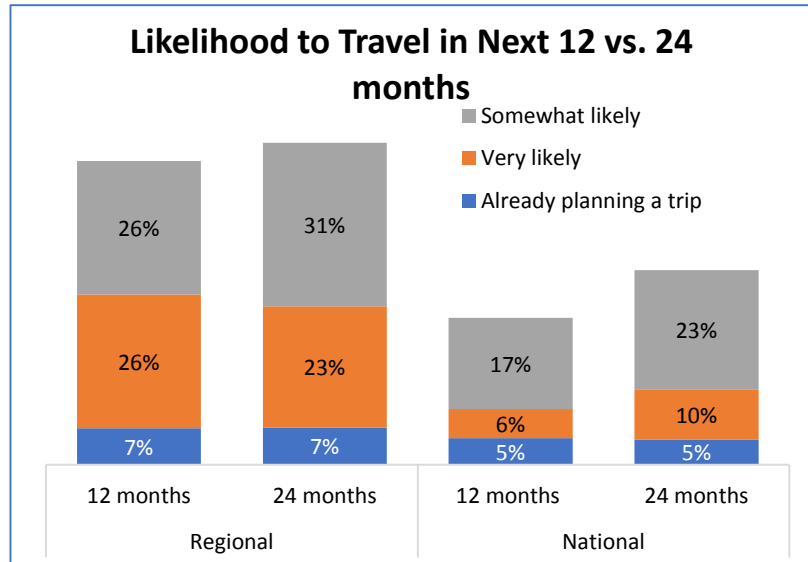
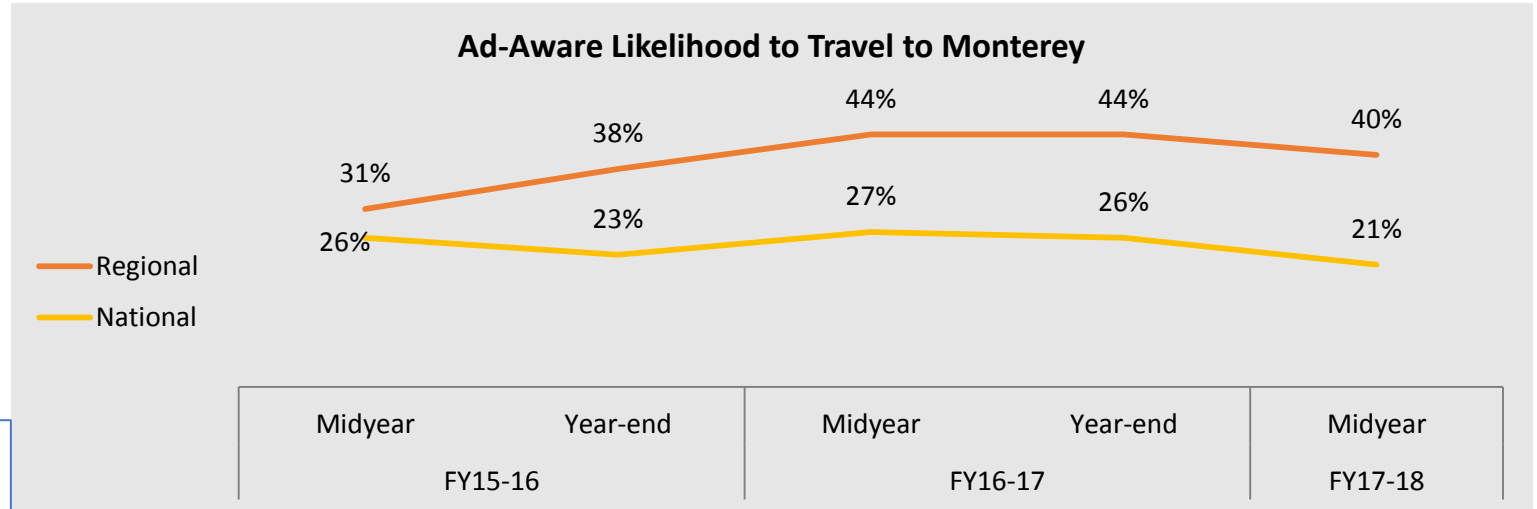
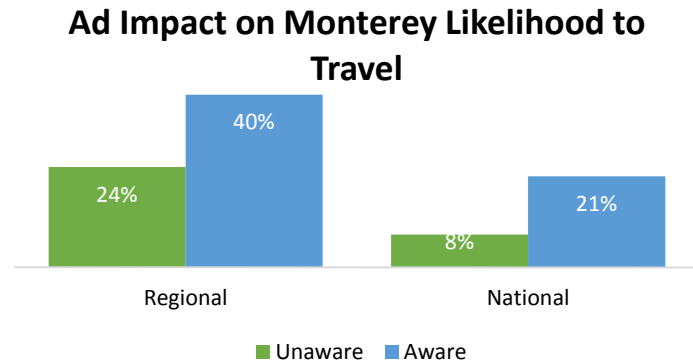
- The brand measure is derived from travelers' ratings of Monterey County's amazing scenery and its image as a charming place and a good weekend getaway destination. The latter attribute contributes to national markets' lower measure, as travelers typically view farther away destinations as places to go for longer trips.

The ads lift unaided brand awareness more than 20 points regionally and nearly 30 points among national travelers.

- Unaided brand awareness is the share of consumers who say they are very or somewhat familiar with Monterey County, which includes a number of towns: Big Sur, Carmel, Monterey and Pebble Beach among others.



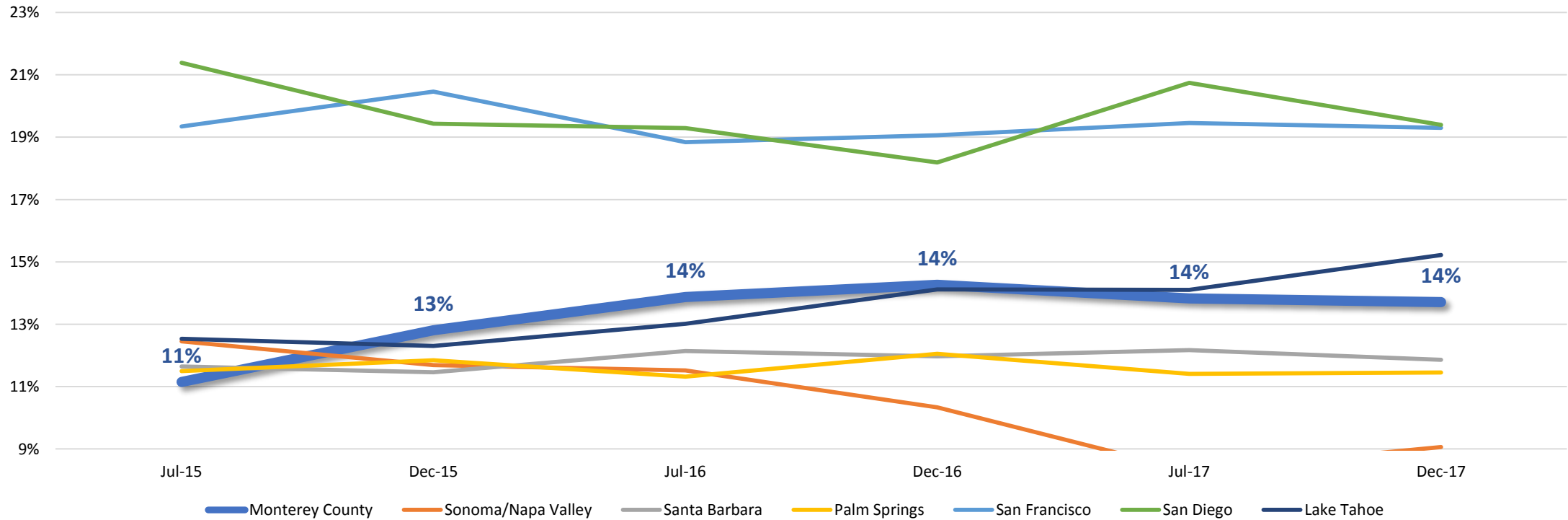
The campaign boosts likelihood to travel, both in the coming year and in the next two years.



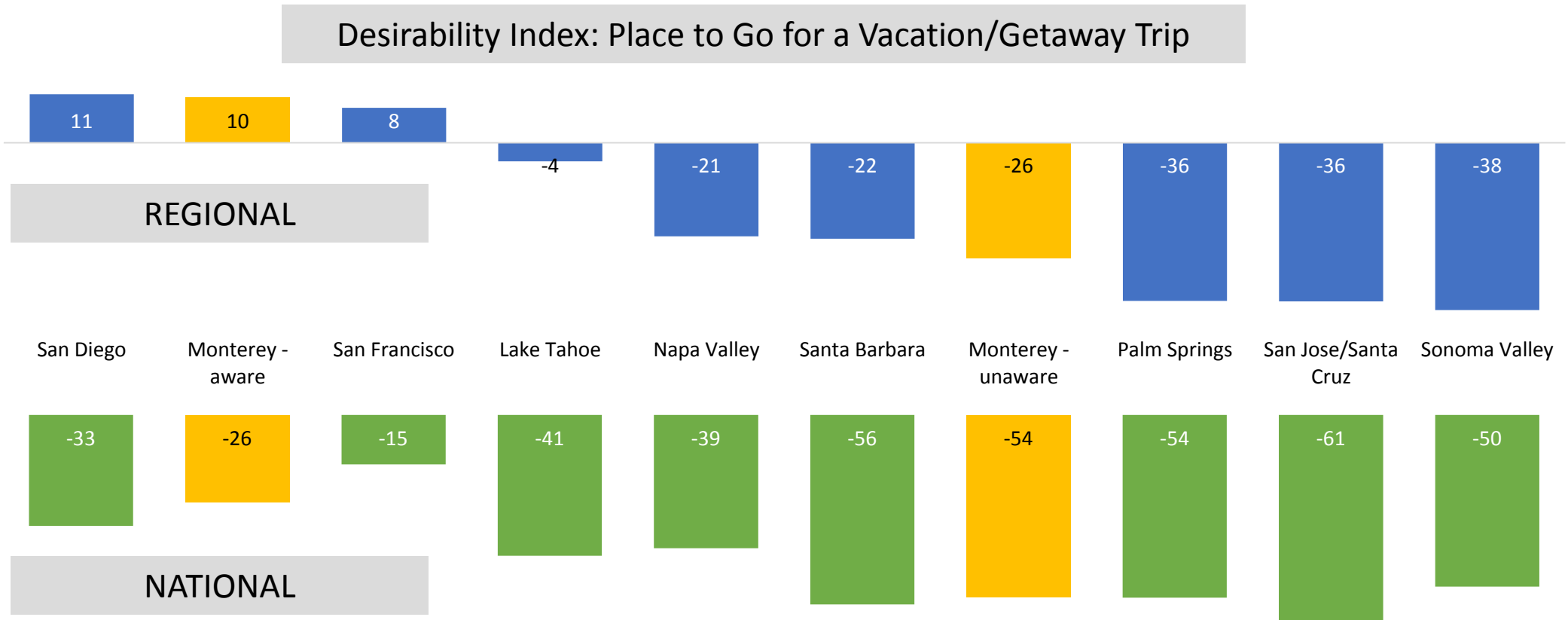
- Weather-related interruptions to some destinations within the county, and much news coverage of these events, may have created confusion about whether the county is fully open for visitors. This is also true of Napa Valley, as the data on the following page illustrates.
- ← Since 2013, travelers have been asked about their likelihood to travel in the coming two years. This year there was interest among MCCVB stakeholders in gauging travel interest in the next 12 months. As expected, there is a slightly higher level of likelihood to travel over the longer period.

Monterey's share of total visit intent within the competitive set remains at 14% behind San Diego + San Francisco; Lake Tahoe captured a greater share as of this midyear measure

Intent Shares - Regional

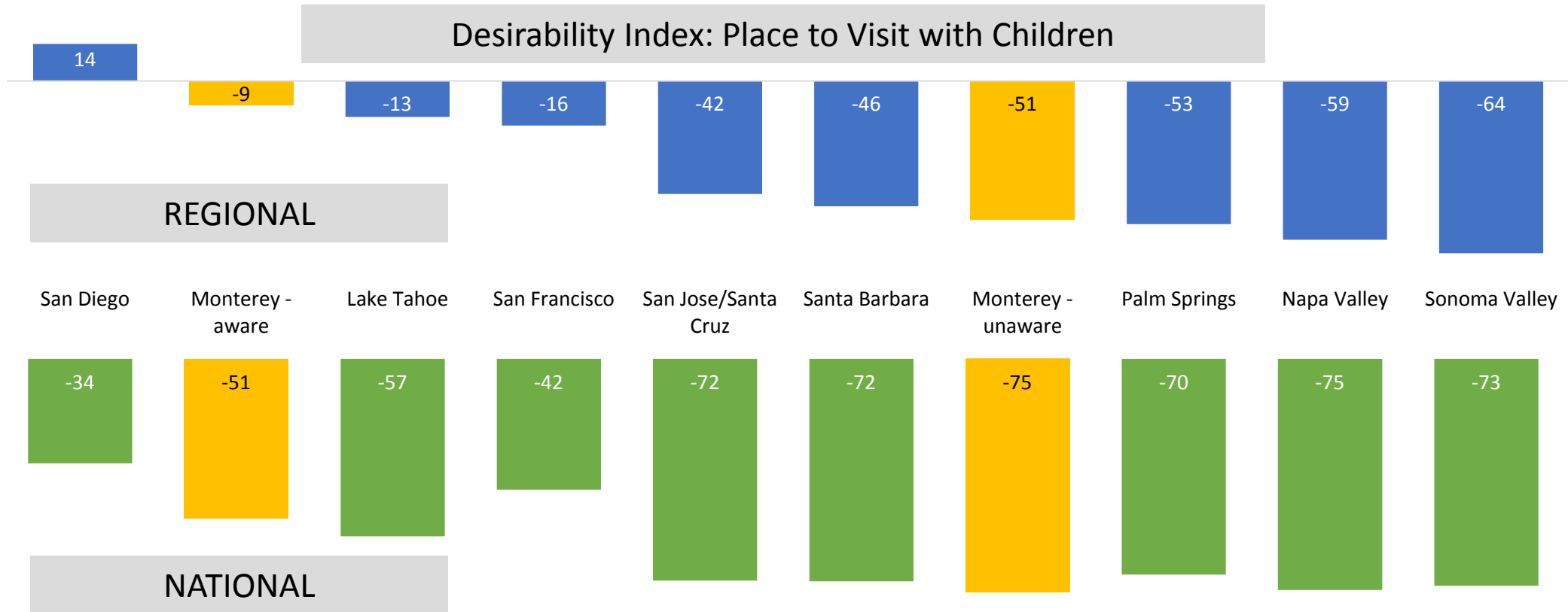


The ads boost Monterey County's competitiveness as a vacation/getaway trip in both market groups.



- The desirability index, which is analogous to a Net Promoter Score (NPS), is a way to compare traveler perceptions of Monterey County as a leisure destination to other destinations in the competitive set. The overall scores themselves are useful only as a measure of relative desirability, and should not be interpreted as positive or negative in their own right.

Regionally and nationally, among the competitive set, Monterey County is 2nd only to San Diego as a place to go with kids.

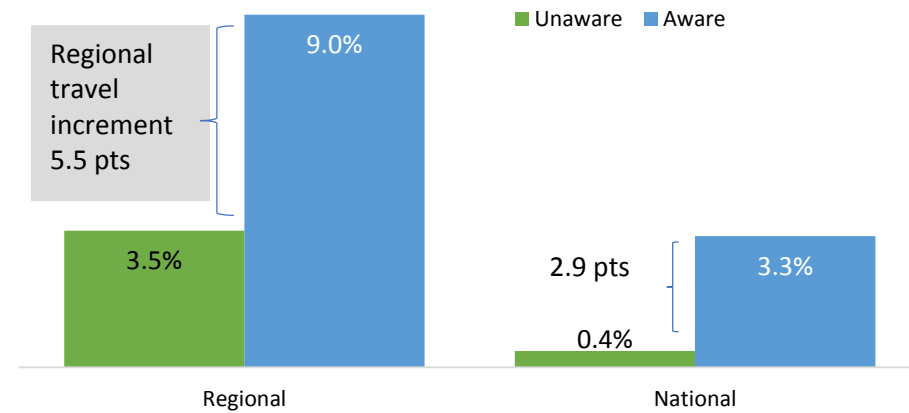


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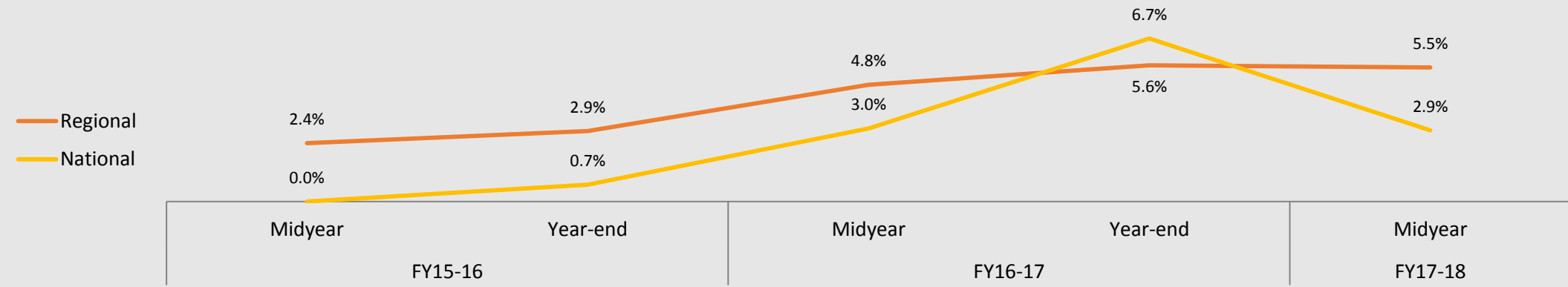
The ads continue to grow incremental travel from regional markets.

- Visit = overnight stay in paid lodging
- The ad-influenced boost in visits is incremental travel. As baseline (unaware) visitation from a region grows, additional growth in incremental travel is harder to attain. Therefore, MCCVB's result among the regional markets is very positive.

Ad Impact on Monterey Visits



Incremental Travel



MCCVB spent 26% less this midyear period than last year, and trip spending decreased just 5% regionally.

Midyear Trip Spending	Regional		National
	FY16-17	FY17-18	FY17-18
Lodging/accommodations	\$378	\$348	\$447
Meals/food/groceries	\$226	\$217	\$319
Attractions	\$127	\$134	\$191
Shopping	\$119	\$109	\$141
Entertainment	\$42	\$20	\$79
Transportation	\$92	\$123	\$204
Other	\$42	\$22	\$84
Total	\$1,028	\$973	\$1,465

- Regionally, average spending increased for attractions and transportation.
- National markets have a small sample size relative to the traveling population. Therefore, while there is clearly a positive impact on visitation from these markets, which tend to stay longer and spend more than nearby markets, we do not continue the calculations for ROI beyond this point.

The GLBM campaign generated a 20% higher ROI and brought \$113M in visitor spending to the community.

REGIONAL Midyear Metrics	FY16-17	FY17-18	Year-over-year change
Aware HHs	4,160,944	4,572,515	10%
Incremental travel %	4.8%	5.5%	15%
Incremental traveling HHs	201,500	252,020	25%
% overnight	77%	77%	0%
% paid accommodations	79%	60%	-24%
Total incremental overnights	122,572	116,317	-5%
Average trip spending	\$1,028	\$973	-5%
Economic impact	\$ 126,004,479	\$113,146,253	-10%
Media spending	\$138,200	\$102,629	-26%
Traditional ROI calculation	\$912	\$1,102	21%

- Compared to last midyear, the FY17-18 campaign generated higher awareness and higher incremental travel.
- With a lower share of stays in paid accommodations, this means slightly fewer incremental overnights.
- Lower advertising investment applied to the \$113 million economic impact means a higher ROI.
- For every \$1 MCCVB spent on paid advertising, more than \$1,000 came back to the community.

The calculation relies only on paid advertising awareness, to ensure the most conservative ROI calculation possible.

In prior reporting, incremental overnights were counted whether they involved stays in paid accommodations or not. The previously reported FY16-17 has been amended to reflect the new methodology.

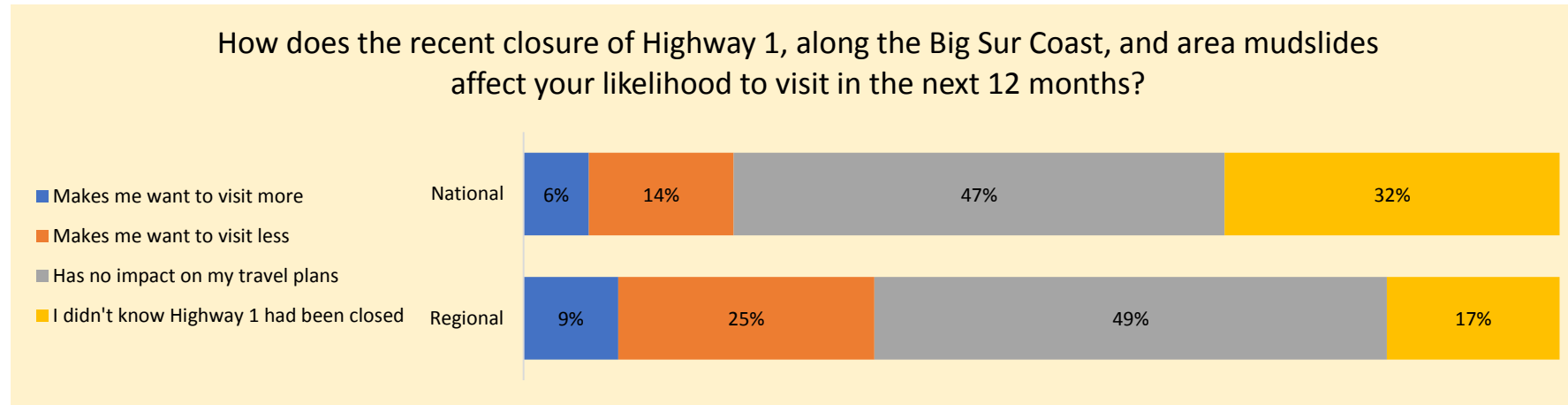
Compared to last year, the current advertising brought 2% more paid room nights to the county due to longer trips.

Regional Midyear Measures	FY16-17	FY17-18
Incremental trips staying in paid accommodations	122,572	116,317
Avg. # nights on trip	2.7	2.9
Ad-influenced room nights	330,944	338,209

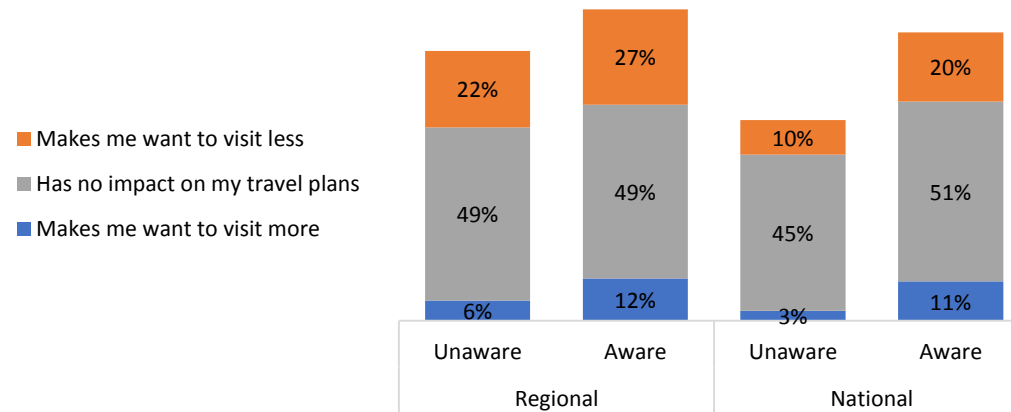
Strategic Considerations

MCCVB Ad & Communications Research —FY17-18 Midyear

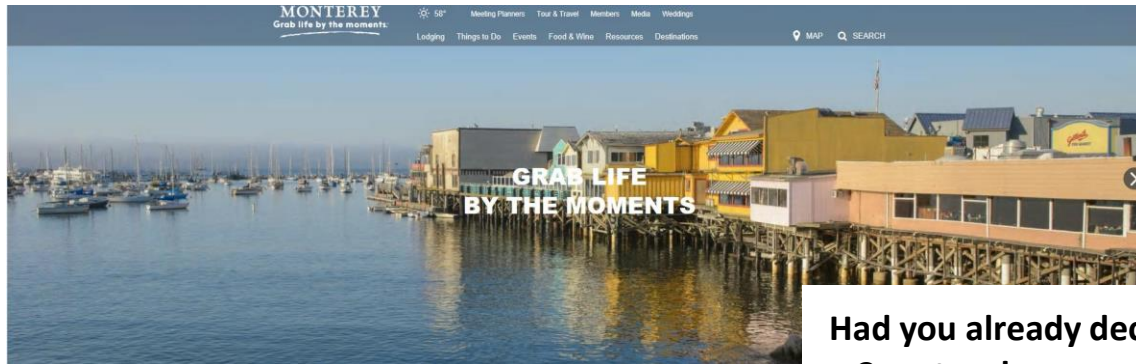
The ads insulate the Big Sur area somewhat against news reports about weather events.



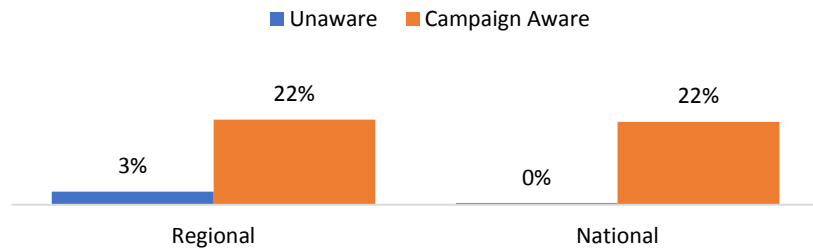
Visit Interest by Marketing Awareness



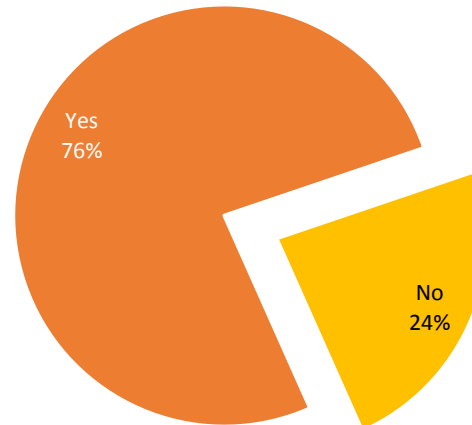
The campaign influences website visits, used by most to plan a Monterey County visit, and social media engagement.



Website Visitation by Campaign Awareness



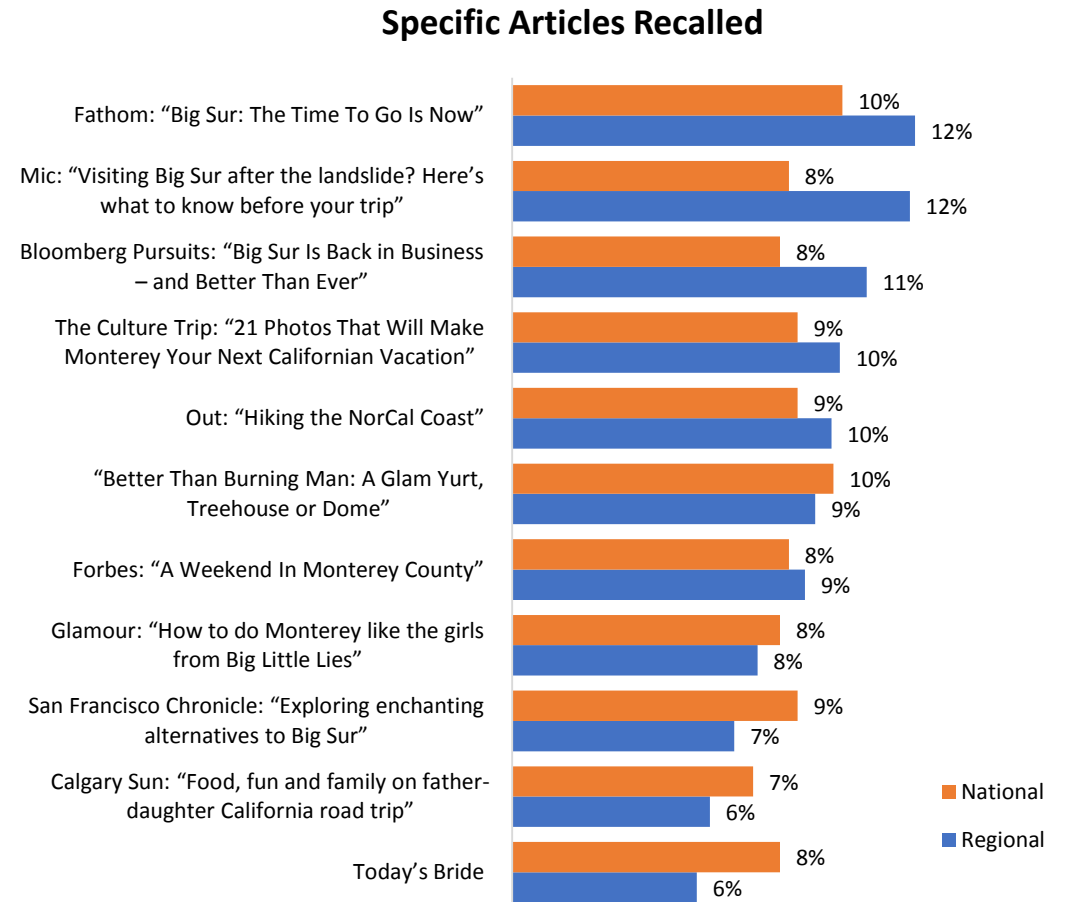
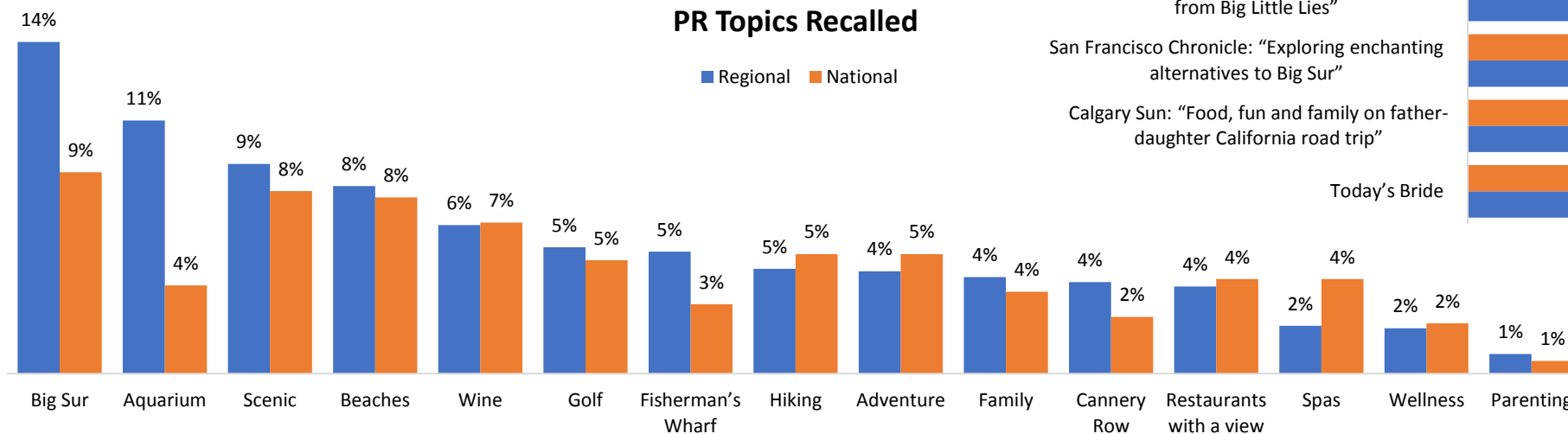
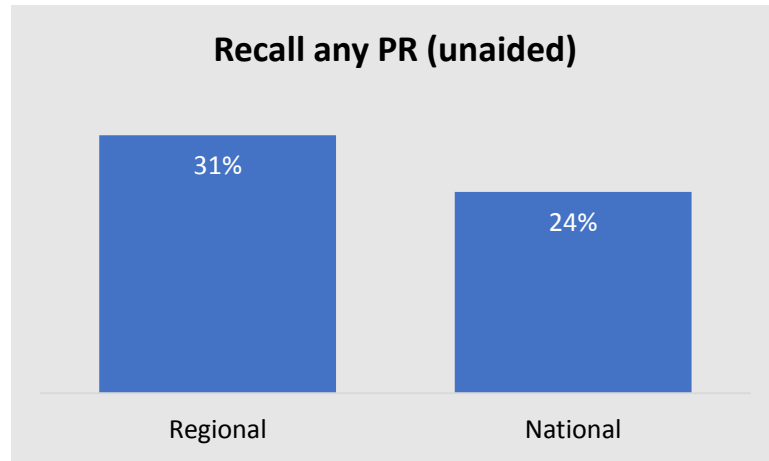
Had you already decided to visit Monterey County when you went to the website?



Of those who visited the MCCVB website. Both Regional and National traveler results are similar.

Have you visited MCCVB's sites on...?	Regional		National	
	Unaware	Aware	Unaware	Aware
Facebook	4%	27%	1%	32%
YouTube	3%	19%	1%	18%
Google+	1%	16%	1%	16%
Instagram	2%	15%	0%	15%
Pinterest	2%	9%	0%	18%
Twitter	1%	8%	0%	14%
Snapchat	1%	8%	0%	12%
Blog Monterey	0%	6%	0%	9%
Flickr	0%	3%	1%	7%

Content Marketing – PR



Appendix

MCCVB Ad & Communications Research —FY17-18 Midyear

Methodology

- To measure the success of the seasonal efforts, MCCVB partnered with Strategic Marketing & Research Insights (SMARInsights) to conduct a baseline measure in April 2013, with subsequent measures every six months. A midyear measure is completed in December each year, and a year-end measure is completed in June.
- Advertising/communication impact is assessed by measuring the differences in perceptions and behaviors between those who recall having been exposed to the various marketing channels and those who have no recall.
- Data is collected via an online survey so that respondents can see and hear the marketing materials, resulting in a representative awareness assessment.
- This current research wave’s data were collected in December 2017.
- A total of 1,405 interviews were completed in the target markets as shown.
- The sample size was larger in the nearby markets, where resources have historically been concentrated. The nearby and direct flight markets are referred to as “Regional markets.”
- Upon completion of data collection, a dataset was compiled, cleaned and coded for analysis. Data were weighted to be representative of the household populations in the geographic markets.

Market	Completed Surveys
San Francisco	262
Sacramento	252
Los Angeles	138
San Diego	131
Remaining CA	127
Phoenix/Las Vegas	130
Remaining National	365
Total	1,405

Campaign spending

	FY13-14			FY14-15			FY15-16			FY16-17			FY16-17		
	National	Regional	Total	National	Regional	Total	National	Regional	Total	National	Regional	Total	National	Regional	Total
Q1 (July-Sept.)	\$0	\$45,758	\$45,758	\$50,624	\$177,005	\$227,629	\$72,250	\$119,696	\$191,946	\$29,547	\$69,100	\$98,647	\$13,643	\$37,249	\$50,892
Q2 (Oct.-Dec.)	\$61,819	\$326,247	\$388,066	\$71,347	\$124,339	\$195,686	\$81,250	\$105,038	\$186,288	\$168,048	\$69,100	\$237,148	\$88,986	\$112,937	\$201,923
Q1-Q2 Total	\$61,819	\$372,005	\$433,824	\$121,971	\$301,344	\$423,315	\$153,500	\$224,734	\$378,234	\$197,595	\$138,200	\$335,795	\$102,629	\$150,186	\$252,815
Q3 (Jan.-March)	\$52,888	\$295,521	\$348,409	\$71,965	\$163,368	\$235,333	\$57,750	\$111,266	\$169,016	\$39,740	\$46,334	\$86,074			
Q4 (April-June)	\$137,847	\$473,921	\$611,768	\$25,085	\$81,660	\$106,745	\$52,750	\$127,150	\$179,900	\$56,000	\$167,718	\$223,718			
Q3-Q4 Total	\$190,735	\$769,442	\$960,177	\$97,050	\$245,028	\$342,078	\$110,500	\$238,416	\$348,916	\$95,740	\$214,052	\$309,792			
FY Total	\$252,554	\$1,141,447	\$1,394,001	\$219,021	\$546,372	\$765,393	\$264,000	\$463,150	\$727,150	\$293,335	\$352,252	\$645,587			

Questionnaire

Monterey County CVB
Brand & Advertising Survey – MIDYEAR
FY17/18 ROI Questionnaire – November 13, 2017

COMPETITIVE SET
Monterey County, which includes a number of towns: Big Sur, Carmel, Monterey and Pebble Beach among others
Sonoma Valley
Santa Barbara
Palm Springs
San Francisco
San Diego
Lake Tahoe
Napa Valley
San Jose/Santa Cruz

SCREENERS

What is your ZIP code? _____

Who in your household is primarily responsible for making decisions concerning travel destinations?

- 1..... Self
- 2..... Self & other
- 3..... Spouse/other → TERMINATE

Please indicate if each of the following applies to you...

[ROTATE]	YES	NO
I use video streaming services like Hulu or Netflix.		
I regularly engage in some form of physical exercise like walking, biking or participating in sports to stay healthy		
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home		[TERMINATE IF NO]
I regularly use social media like Facebook, Twitter, or Instagram		

What is your age? _____ IF <18 -> TERMINATE

TRAVEL HABITS & MONTEREY COUNTY VISITATION

1. How many of the following types of trips have you taken in the past year?
 - a. A vacation or leisure trip that included at least 3 nights in paid lodging and the main purpose was not to visit family?
 - b. A getaway trip that included at least one night in paid lodging and the main purpose was not to visit family?

	Vacation Trip	Getaway Trip
None		
One		
Two		
Three		
Four or more		

1c. People look for different experiences when they travel. When you are picking a destination for a **longer trip**, how important are each of the following in selecting the destination?

[ROTATE]	Not at all important				Very important
Relaxation and rejuvenation	1	2	3	4	5
Enrichment or learning	1	2	3	4	5
Connection with family or friends	1	2	3	4	5
Thrills and excitement	1	2	3	4	5
A place to be pampered	1	2	3	4	5
Being amazed by the sites or experiences	1	2	3	4	5

1d. Now thinking of a **short getaway trip**, how important are each of the following in picking the destination?

[ROTATE]	Not at all important				Very important
Relaxation and rejuvenation	1	2	3	4	5
Enrichment or learning	1	2	3	4	5
Connection with family or friends	1	2	3	4	5
Thrills and excitement	1	2	3	4	5
A place to be pampered	1	2	3	4	5
Being amazed by the sites or experiences	1	2	3	4	5

2. How familiar are you with each of the following destinations and what they have to offer as a place for a leisure trip?

[ROTATE]	Not at all familiar	Somewhat familiar	Very familiar
[INSERT COMPETITIVE SET]			

[ROTATE]	Q3. Please check the areas that you have visited for a leisure trip in the past 2 years (day trip or overnight trip).	Q3a. How many trips have you taken to this area in the past 2 years?
Big Sur	<input type="checkbox"/>	<input type="checkbox"/>
Carmel	<input type="checkbox"/>	<input type="checkbox"/>
Lake Tahoe	<input type="checkbox"/>	<input type="checkbox"/>
Marina	<input type="checkbox"/>	<input type="checkbox"/>
Monterey	<input type="checkbox"/>	<input type="checkbox"/>
Moss Landing	<input type="checkbox"/>	<input type="checkbox"/>
Pacific Grove	<input type="checkbox"/>	<input type="checkbox"/>
Palm Springs	<input type="checkbox"/>	<input type="checkbox"/>
Pebble Beach	<input type="checkbox"/>	<input type="checkbox"/>
Salinas	<input type="checkbox"/>	<input type="checkbox"/>
San Francisco	<input type="checkbox"/>	<input type="checkbox"/>
San Diego	<input type="checkbox"/>	<input type="checkbox"/>
Santa Barbara	<input type="checkbox"/>	<input type="checkbox"/>
Seaside	<input type="checkbox"/>	<input type="checkbox"/>
Sonoma/Napa Valley	<input type="checkbox"/>	<input type="checkbox"/>
None of these	<input type="checkbox"/>	

MONTEREY COUNTY VISITOR IF Q3 = BIG SUR, CARMEL, MARINA, MONTEREY, MOSS LANDING, PEBBLE BEACH, PACIFIC GROVE, SALINAS OR SEASIDE.

NPS FOR COMPETITIVE SET – USE FOR DESIRABILITY INDEX

4. How likely are you to recommend each of the following places to your friends or family as a destination to visit...[SHOW ENDINGS BELOW IN BLUE FONT TO CALL OUT]
 1. for a vacation or getaway trip?
 2. with children?

[ROTATE]	Not at all likely – 0	1	2	3	4	5	6	7	8	9	Extremely likely – 10
[INSERT COMPETITIVE SET]											

IF Q3 DOES NOT EQUAL MONTEREY COUNTY VISITOR, SKIP TO Q16b (IMAGE & VISIT INTENT).

TRIP SPECIFICS

TRIP. You indicated that you visited [MONTEREY TOWNS FROM Q3], which are/is in Monterey County. During what month(s) did you visit Monterey County?

ALLOW MULTIPLES

January 2016	January 2017	
February 2016	February 2017	
March 2016	March 2017	
April 2016	April 2017	
May 2016	May 2017	
June 2016	June 2017	
July 2016	July 2017	
August 2016	August 2017	

Questionnaire

September 2016	September 2017	
October 2016	October 2017	
November 2016	November 2017	
December 2016	December 2017	

IF MULTIPLE VISITS, ASK Q4A.

4a. Which of these Monterey trips do you consider to be your "primary" leisure trip? This is the trip in which you did the most stuff/stayed the longest.

SHOW MONTHS VISITED FROM TRIP.

For the next set of questions, please think about your MONTH YEAR Monterey trip.

4. Where within Monterey County did you go on this MONTH YEAR trip?

1. Big Sur
2. Carmel
3. Marina
4. Monterey
5. Moss Landing
6. Pacific Grove
7. Pebble Beach
8. Salinas
9. Seaside
10. Other, please specify _____
11. None of these

5. Which of the following best describes your MONTH YEAR trip to Monterey County?

1. Monterey County was my main destination
2. I was ultimately headed somewhere else, but included a visit to Monterey County
3. Monterey County was one of several places I decided to visit on this trip

ASK Q5A IF Q5 = 2 OR 3

6a. Where else did you visit? _____

6. Which of the following best describes your MONTH YEAR visit to Monterey County?

1. A getaway trip
2. A vacation
3. A visit to friends or relatives
4. A visit to a specific activity or event. Please specify _____

7. Was your MONTH YEAR trip...?

1. An overnight trip
2. A day trip

ASK Q8 AND Q9 ONLY IF Q7 = OVERNIGHT TRIP

8. How many nights did you spend in Monterey County during this MONTH YEAR trip?

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9. What form(s) of lodging did you use during your MONTH YEAR trip?

1. Hotel or motel
2. Inn, lodge or bed & breakfast
3. Resort
4. Campground or RV park
5. Rental home, condominium or time share
6. With friends or family
7. Homesharing/vacation rental i.e. booked through Airbnb, Homeaway, etc.
8. Other, please specify _____

9A. [ASK IF MULTIPLE FORMS OF LODGING CHOSEN IN Q9] What was your main form of lodging, the one where you spent the most nights during your MONTH YEAR trip to Monterey County?

10. Which of the following did you do as a part of your MONTH YEAR trip? [ROTATE]

Monterey Bay Aquarium	
Cannery Row	
Fisherman's Wharf	
17 Mile Drive	
Mazda Raceway Laguna Seca	
National Steinbeck Center	
My Museum	
Wild Things	
Monarch Grove Sanctuary	
Pacific Grove Museum of Natural History	
Carmel Mission	
Museum of Monterey	
Monterey County Agricultural & Rural Life Museum	
Wineries/wine tasting	
Point Lobos	
Scenic sightseeing	
Monterey Bay tour	
Visiting a spa	
Tours, attractions or concerts	
Outdoor adventure activities	
Golfing	
Dining at a unique restaurant	
Shopping	
Large scale special event or festival	
Visited Carmel Valley	
Elkhorn Slough	
Other, please specify	
None	

ONLY SHOW THE ACTIVITIES THEY CHOSE ABOVE PLUS NONE AND ASK:

11a. Of these activities, please indicate if there were any that were a major influence when you selected the destination for this trip. You may choose up to 3.

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11. Including you, how many people were on this MONTH YEAR trip?
RECORD NUMBER _____ (IF 1, SKIP TO Q13)

12a. How many were younger than 18? RECORD NUMBER _____

12. Which best describes your travel party for this MONTH YEAR trip?

- Couple
- Family traveling with children
- Extended family
- Women-only trip
- Men-only trip
- Other, please specify _____

13. Thinking about this MONTH YEAR trip, how far in advance did you begin to plan?

- 1...Less than one week
- 2...One to two weeks
- 3...Two to three weeks
- 4...Three to four weeks
- 5...One to two months
- 6...Three to four months
- 7...More than four months in advance
- 8...Don't know

14. Thinking about your overall travel experience in Monterey County, would you say it was...?

1. Poor
2. Fair
3. Good
4. Very good
5. Excellent

15. To better understand your travel habits, we are interested in finding out the approximate amount of money you and other members of your travel party spent while in Monterey County in MONTH YEAR. Please estimate how much your travel party spent in total on...

- Lodging/Accommodations _____
- Meals/Food/Groceries _____
- Entertainment/Attractions _____
- Shopping _____
- Entertainment such as shows, theater or concerts _____
- Transportation such as gasoline, auto rental or flight costs _____
- Other _____

15A. Was this [MONTH/YEAR] trip your first time visiting Monterey County for leisure?

1. Yes
0. No

15B. [ASK IF MAIN TRIP WAS IN OR AFTER OCTOBER 2017] Was this trip to Monterey County the result of your plans to another California destination being interrupted by fires?

1. Yes
0. No

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Questionnaire

IMAGE & VISIT INTENT

16b. For each statement, please rate how much you agree or disagree that the statement describes Monterey County.

[ROTATE]	Strongly disagree				Strongly agree
Is a place with lots to see and do	1	2	3	4	5
Has amazing scenery	1	2	3	4	5
Is fun	1	2	3	4	5
Is an upscale destination	1	2	3	4	5
Is a unique vacation experience you can't get at other places	1	2	3	4	5
Is a charming place	1	2	3	4	5
Is a welcoming and friendly place	1	2	3	4	5
Is a good weekend getaway destination	1	2	3	4	5

[Q16 USED FOR VISIT INTENT INDEX – ASK OF ALL RESPONDENTS; SHOW 12 MONTHS AND 24 MONTHS SIDE BY SIDE SO RESPONDENT CAN ANSWER BOTH TIME PERIODS FOR EACH DESTINATION TOGETHER]

16. How likely are you to visit each of the following areas in the next _____ months for a leisure trip?

12 MONTHS	Not at all likely	Not very likely	Somewhat likely	Very likely	Already planning a trip
24 MONTHS	Not at all likely	Not very likely	Somewhat likely	Very likely	Already planning a trip
[INSERT COMPETITIVE SET; ROTATE]					

16A. How does the recent closure of Highway 1, along the Big Sur Coast, and area mudslides affect your likelihood to visit in the next 12 months?

- Makes me want to visit more
- Makes me want to visit less
- Has no impact on my travel plans
- I didn't know Highway 1 had been closed or that there were mudslides in the area

17. Please pick three of the following that are the most likely to motivate you to visit a destination for a leisure trip. [ROTATE]

Beautiful scenery
Wineries and wine experiences
Outdoor adventure opportunities
World-class resorts
A lot of culture and history
Amazing food and wine options
Attractions for kids and the family
Shopping
National parks and other outdoor options
Intimate inns and romantic experiences
World-class golf
Opportunity to enjoy beaches and the ocean






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Opportunity to see and learn about marine environment and wildlife
Fun nightlife

ADVERTISING SECTION

Next you will be shown travel advertisements to find out if you recall seeing these ads. Please take a moment to view the ads and answer the questions. [ROTATE MEDIA; ROTATE ADS WITHIN MEDIA]
!:\Ads Master\Monterey\2017-18 Ad Effectiveness\Items for SMARI 17-18

Digital [SHOW ADS IN GRID WITH YES/NO BY EACH]

 SeeMonterey Big Sur Banner 3.jpg	 SeeMonterey Digital Ad 1.jpg	 SeeMonterey Digital Ad 4.jpg
 SeeMonterey Digital Ad 2.JPG	 SeeMonterey Digital Ad 3.JPG	

 SeeMonterey Fall Campaign Digital Ad 1.jpg

Dig1. [SHOW ADS IN GRID WITH YES/NO BY EACH] Please indicate if you have seen each of these online ads before now.

- 0. Yes
- 1. No

Dig2. How much do you agree that [these ads make/this ad makes] you want to visit Monterey County?

Strongly disagree	1	2	3	4	Strongly agree	5
-------------------	---	---	---	---	----------------	---

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Email



Drive Market Targeted eBlast.png

Email1. Please indicate if you have seen this email ad before now.

- 1. Yes
- 0. No

Email2. How much do you agree that this ad makes you want to visit Monterey County?

Strongly disagree	1	2	3	4	Strongly agree	5
-------------------	---	---	---	---	----------------	---

Print

 SF full page.jpg	 SF top strip.jpg
---	---

Print1. [SHOW ADS IN GRID WITH YES/NO BY EACH] Please indicate if you have seen each of these newspaper ads before now.

- 1. Yes
- 0. No

Print2. How much do you agree that these ads make you want to visit Monterey County?

Strongly disagree	1	2	3	4	Strongly agree	5
-------------------	---	---	---	---	----------------	---

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Questionnaire

SOCIAL [ASK ALL]

Social1. [SHOW ADS IN GRID WITH YES/NO BY EACH] Please indicate if you have seen each of these social media posts before now.

2. Yes
0. No

Social2. How much do you agree that these social media ads make you want to visit Monterey County?

Strongly disagree	1	2	3	4	Strongly agree	5
-------------------	---	---	---	---	----------------	---

Native Advertorials

Native1. [SHOW ADS IN GRID WITH YES/NO BY EACH] Please indicate if you have seen this story online before now.

3. Yes
0. No

Native2. How much do you agree that this story makes you want to visit Monterey County?

Strongly disagree	1	2	3	4	Strongly agree	5
-------------------	---	---	---	---	----------------	---

Social Influencers [SHOW INFLUENCER NAME/TITLE BESIDE PICTURE WITH YES/NO FOR EACH]

Influencers1. [SHOW ADS IN GRID WITH YES/NO BY EACH] Have you seen this article/blog post before now?

Influencers2. How much do you agree that these articles and blog posts make you want to visit Monterey County?

Strongly disagree	1	2	3	4	Strongly agree	5
-------------------	---	---	---	---	----------------	---

GRID. Now please think about all of the ads and articles you just saw and indicate how much you agree that...

ROTATE	Strongly disagree	1	2	3	4	Strongly agree
After seeing these ads and articles I am more interested in visiting Monterey County	1	2	3	4	5	
These ads and articles make me want to get more information on Monterey County	1	2	3	4	5	
These ads and articles show that there is a wide variety of sights & activities in Monterey County	1	2	3	4	5	
The ads and articles portray Monterey County as a desirable destination	1	2	3	4	5	
The ads and articles portray Monterey County as a nearby destination	1	2	3	4	5	
The ads and articles make me want to go to the website and learn more about the destination and the packages/deals offered	1	2	3	4	5	

PUBLIC RELATIONS

21. In the last year do you recall seeing or hearing any news stories, articles or feature stories about Monterey County, including Monterey, Carmel, Pebble Beach, Big Sur or other parts of Monterey County?

Yes
No

21a. (IF YES) What was the information that was in this news story, article or feature? Choose as many as apply.

[ROTATE]
Family
Parenting
Adventure
Hiking
Scenic
Wellness
Spas
Wine
Golf
Beaches
Restaurants with a view
Aquarium
Cannery Row
Fisherman's Wharf
Big Sur
Other, please specify _____

21c. [ASK EVEN IF Q21 IS NO] Please indicate if you have seen each of these articles about Monterey County recently. [SHOW TITLE OF ARTICLE + PUBLICATION NAME BESIDE PICTURE - CAROUSEL - WITH YES/NO FOR EACH]

BETTER THAN BURNING MAN - A GLAM YURT TREEHOUSE OR DOME.png	bloomberg_BIGSURISBACKANDBETTER THAN EVER.png	bridestoday_CALIFORNIA GIRLS.png

Questionnaire

Calgary Sun: "Food, fun and family on father-daughter California road trip" calgarysun_FOODFUNANDFAMILYONFATHERDAUGHTERROADTRIP.png	Fathom: "Big Sur: The Time To Go Is Now" fathom_BIGSURTHETIMETOGOISNOW.png	Forbes: "A Weekend In Monterey County" forbes_AWEEKENDINMONTEREYCOUNTY.png
Glamour: "How to do Monterey like the girls from Big Little Lies" glamour_BIGLITTLELIESLOCATION.png	Mic: "Visiting Big Sur after the landslide? Here's what to know before your trip" mic_VISTINGBIGSURAFTERLANDSLIDE.png	Out: "Hiking the NorCal Coast" out_HIKINGNORCALCOAST.png
San Francisco Chronicle: "Exploring enchanting alternatives to Big Sur" sfchronicle_EXPLORINGENCHANTINGALTERNATIVESTOBIGSUR.png	The Culture Trip: "21 Photos That Will Make Monterey Your Next Californian Vacation" theculturetrip_21PHOTOSTHATWILLMAKEMONTEREYYOUR.png	

22. Have you visited the website for the Monterey County Convention & Visitors Bureau www.seemonterey.com?



I:\Ads Master\Monterey\2016-2017 Ad Effectiveness\MONT13website.jpg (IMAGE IS NEW)

1.....Yes
0.....No

ASK IF THEY VISITED MONTEREY AND THEY VISITED THE WEBSITE:

22b. You indicated that you have visited Monterey and that you went to the Monterey County CVB website. Had you already decided to visit Monterey when you went to the website?

1.....Yes
0.....No

26. Have you visited the Monterey County CVB's sites on any of the following social media?

ROTATE	Yes	No
Facebook		
Twitter		
Flickr		
YouTube		
Google+		
Pinterest		
Blog Monterey		
Instagram		
Snapchat		

DEMOGRAPHICS

The following questions are for classification purposes only so that your responses may be grouped with those of others.

D1. Are you...?

- Married
- Divorced/Separated
- Widowed
- Single/Never married

D2. Including you, how many people are currently living in your household? ____

D3. How many living in your household are children under the age of 18? ____

D4. Which of the following categories represents the last grade of school you completed?

- 1... High school or less
- 2... Some college/technical school
- 3... College graduate
- 4... Post graduate degree

D5. Which of the following categories best represents the total annual income for your household before taxes?

- Less than \$25,000
- \$25,000 but less than \$35,000
- \$35,000 but less than \$50,000
- \$50,000 but less than \$75,000
- \$75,000 but less than \$100,000
- \$100,000 but less than \$150,000
- \$150,000 but less than \$200,000
- \$200,000 or more

D6. Which of the following best describes your racial and ethnic heritage? Are you...? [ALLOW MULTI]

- Caucasian/White
- African American/Black
- Latino/Hispanic

- Asian
- American Indian
- Other Specify _____

D9. Do you identify as LGBTQ?

- Yes
- No
- Prefer not to answer

D8. Are you...?

- Male
- Female