

MCCVB  
*Marketing Intelligence Report*  
February 17, 2016



# MARKETING INTELLIGENCE REPORT

This report summarizes a number of key research programs initiated and managed by MCCVB. These include:

- Visitor Profile Study – CY2015
- Communication Effectiveness Study –  
December 2015



Monterey County Convention  
& Visitors Bureau

**2015 Monterey County  
Lodging Guest Visitor Profile  
Final Report of Findings**

January 2016

# Research Objectives

This study presents the findings of a comprehensive visitor profile research project conducted by Destination Analysts, Inc. on behalf of the Monterey County Convention & Visitors Bureau. The study was compiled from visitor surveys collected during 2015, and uses data collected in a survey of the county's hotel guests and an intercept survey of visitors conducted at locations around the county. The data presented in this report only includes respondents who stayed overnight in Monterey County in paid lodging such as a hotel, motel, inn or hostel. The key informational goals of the project were to develop a comprehensive profile of lodging guest visitors to the county and understand their:

- Reason for visiting Monterey County
- Trip characteristics
- Travel party profiles
- In-market spending metrics
- Travel planning resources used
- Activities in Monterey County
- Things liked and disliked about Monterey County
- Demographic and geographic profiles



# Methodology

The comprehensive lodging guest visitor profile presented in this report uses data collected in two separate efforts. A survey of the county's lodging guests distributed at area lodging properties and an intercept survey of visitors conducted at locations around the destination. For both efforts, the same survey questionnaire was used, yielding a sample of 411 fully-completed surveys of lodging guest visitors.

## **(1) Monterey County Lodging Guest Survey**

The Monterey County Lodging Guest Survey was a self-administered survey conducted at twenty-eight (28) participating Monterey County lodging properties. The survey questionnaire was developed by Destination Analysts in consultation with the Monterey County CVB. It was laid out in a one-page, tri-fold printed piece. The printed piece was designed with a business-reply panel so that upon completing the survey, Monterey County lodging guests could simply fold, seal and drop it in the mail. The printed piece also provided a URL for guests to take the survey online should they have preferred. A sweepstakes to win one of several cash prizes was offered as an incentive for lodging guests to complete the survey.

The survey was distributed to all guests at participating properties over a two-week period during each quarter of the year. During the year and throughout each distribution week, guests were given the survey on the day of their departure, either in their room with their express checkout receipt or by the front desk staff when they check out. In total, 220 completed surveys were collected.

The properties participating in this effort are listed on the following page.

# Methodology (Continued)

The following lodging properties participated in this research:

- ABVI Monterey
- Asilomar Conference Grounds
- Bayside Inn
- Best Western The Inn & Suites Pacific Grove
- Big Sur River Inn
- Captain's Inn at Moss Landing
- Carmel Lodge
- Carmel Mission Inn
- Casa Munras Garden Hotel & Spa
- Four Sisters Inn
- Glen Oaks Big Sur
- Happy Landing Inn
- Hofsas House
- Hotel 1110
- Inns by the Sea
- Jabberwock Inn
- L'Auberge Carmel
- Martine Inn
- Monterey Bay Inn
- Monterey Beach Resort
- Monterey Hostel
- Monterey Marriott
- Portola Hotel & Spa
- Tradewinds Carmel
- Sprindrift Inn
- The Stevenson Monterey
- Victorian Inn
- Villa Franca Inn



Portola Hotel & Spa. Digital image. [www.PortolaHotel.com](http://www.PortolaHotel.com). Web.

# Methodology (Continued)

## (2) Monterey County Visitor Intercept Survey

Additionally, an intercept survey was conducted of visitors to Monterey County. At several time periods during the year, Destination Analysts' surveyors worked at locations around Monterey County and randomly intercepted visitors. In this effort, only visitors to the county were interviewed—those who reside in the county or were in the area for routine business purposes were not interviewed. The survey questionnaire was nearly identical to that used for the Lodging Guest Survey and took approximately 6 minutes to administer. In total, 191 completed surveys from visitors staying overnight in Monterey County in paid lodging were collected.

Surveys were collected at the following locations:

- Cannery Row
- Fisherman's Wharf
- Lover's Point
- Carmel Plaza
- Carmel Valley Village
- Monterey Marriott
- Portola Hotel
- Old Town Salinas



*Destination Analysts' staff surveying visitors at Carmel Plaza*



*Destination Analysts' staff surveying visitors at the Fisherman's Wharf*



# Snapshot of Findings – Lodging Guest Visitor

*The following two slides illustrate key findings from both the visitor intercept and lodging guest surveys for visitors who stayed overnight in Monterey County in paid lodging.*



# The Monterey County Lodging Guest Visitor – Snapshot of Findings

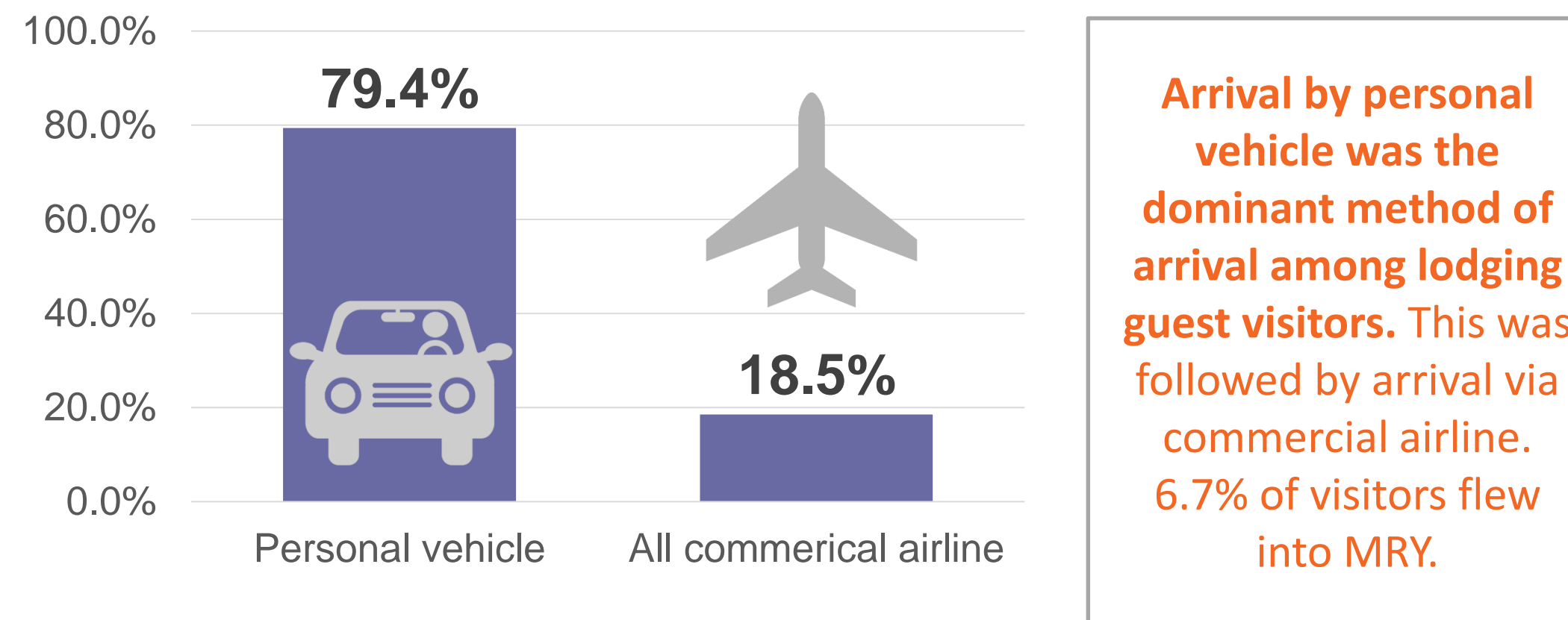
## Primary Reasons for Visiting Monterey County (% of respondents)



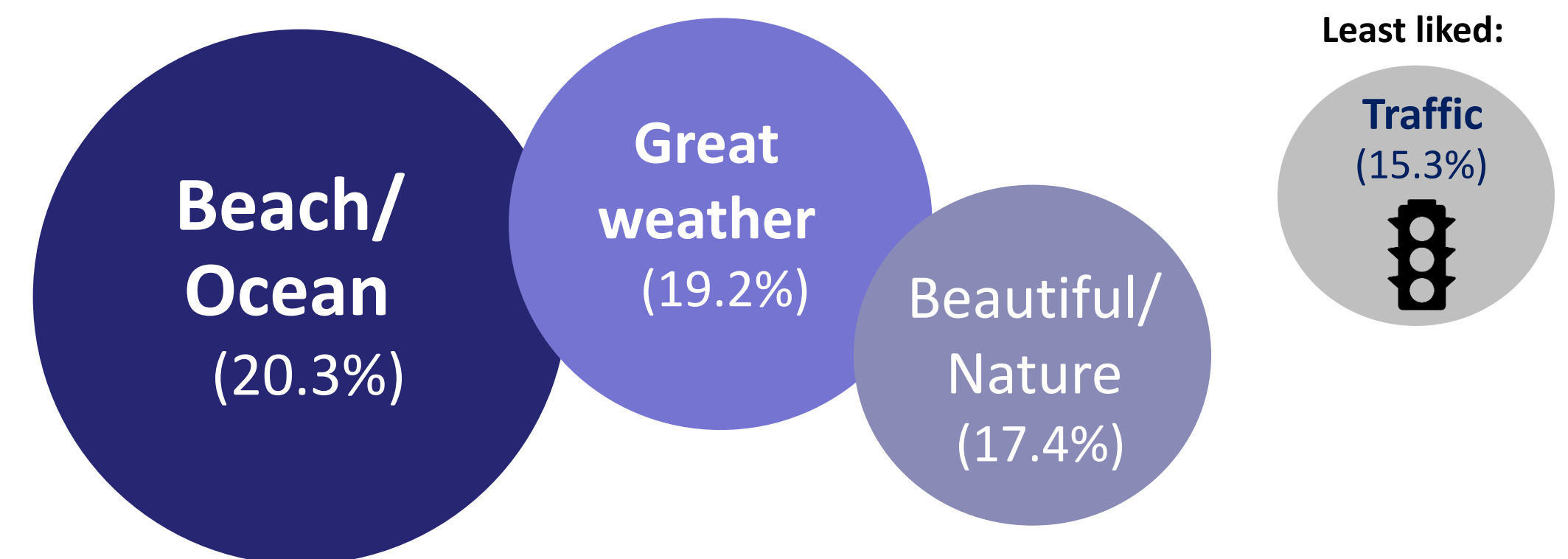
## Visitor Trip Details (% of respondents)



## Method of Arrival into Monterey County (% of respondents)

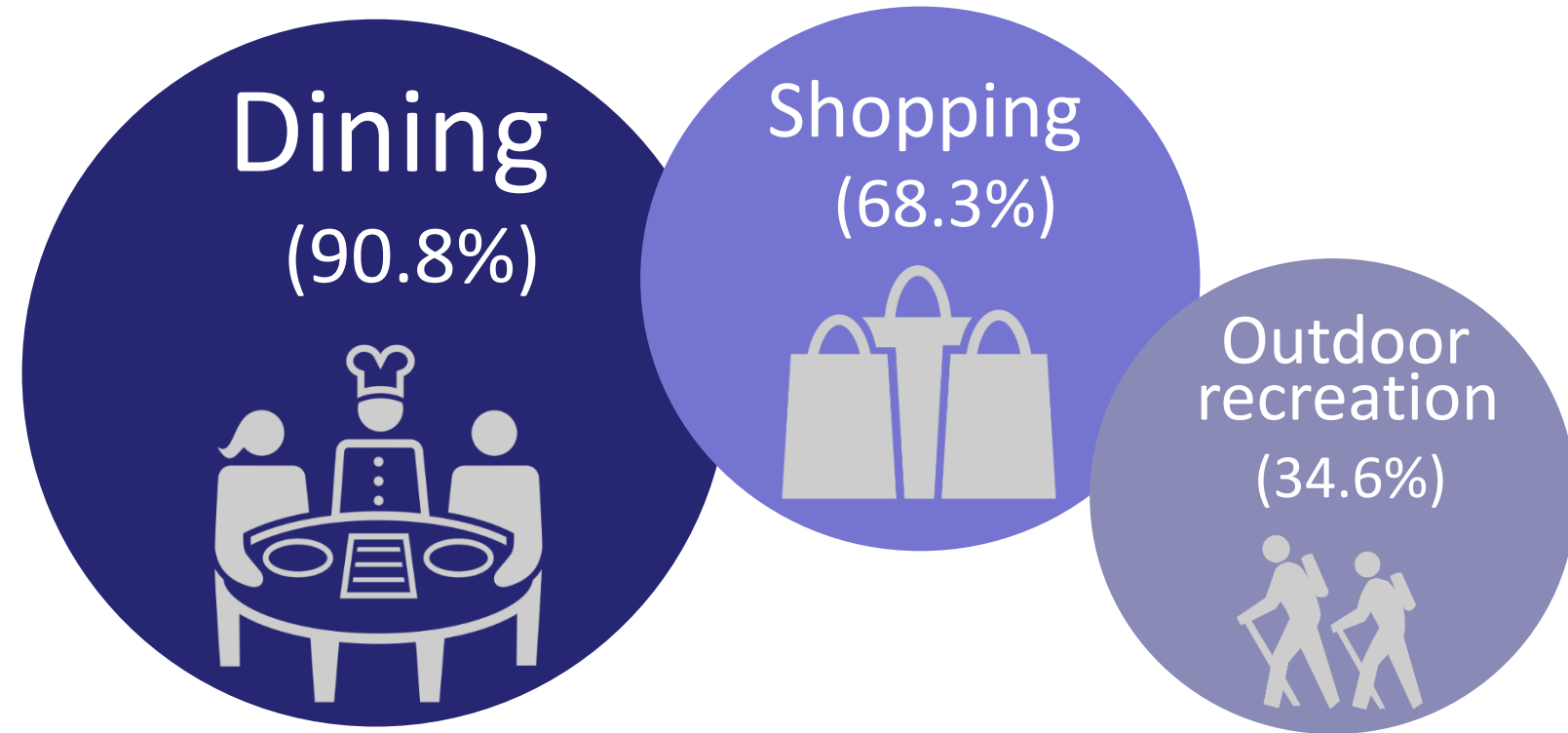


## Most Liked Aspects & Least Liked Aspect of Monterey County (% of respondents)

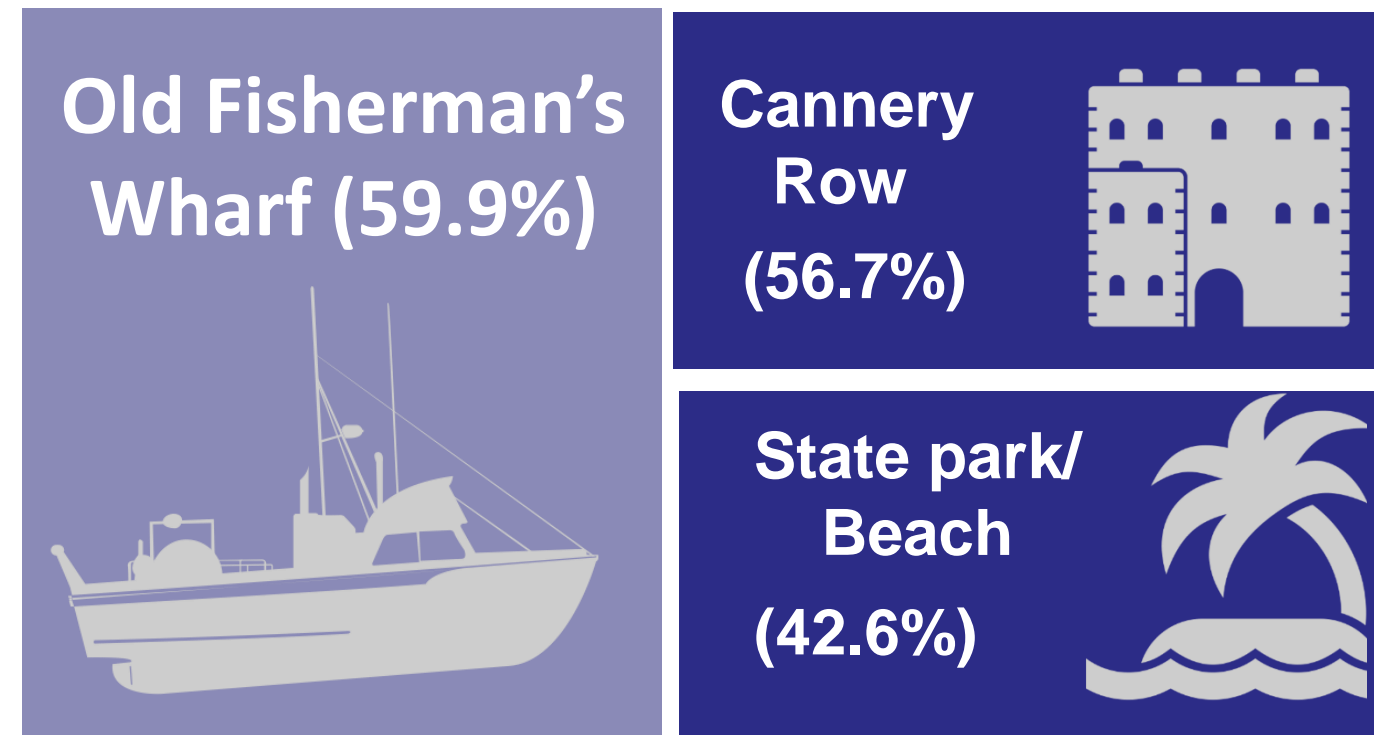


# The Monterey County Lodging Guest Visitor – Snapshot of Findings (continued)

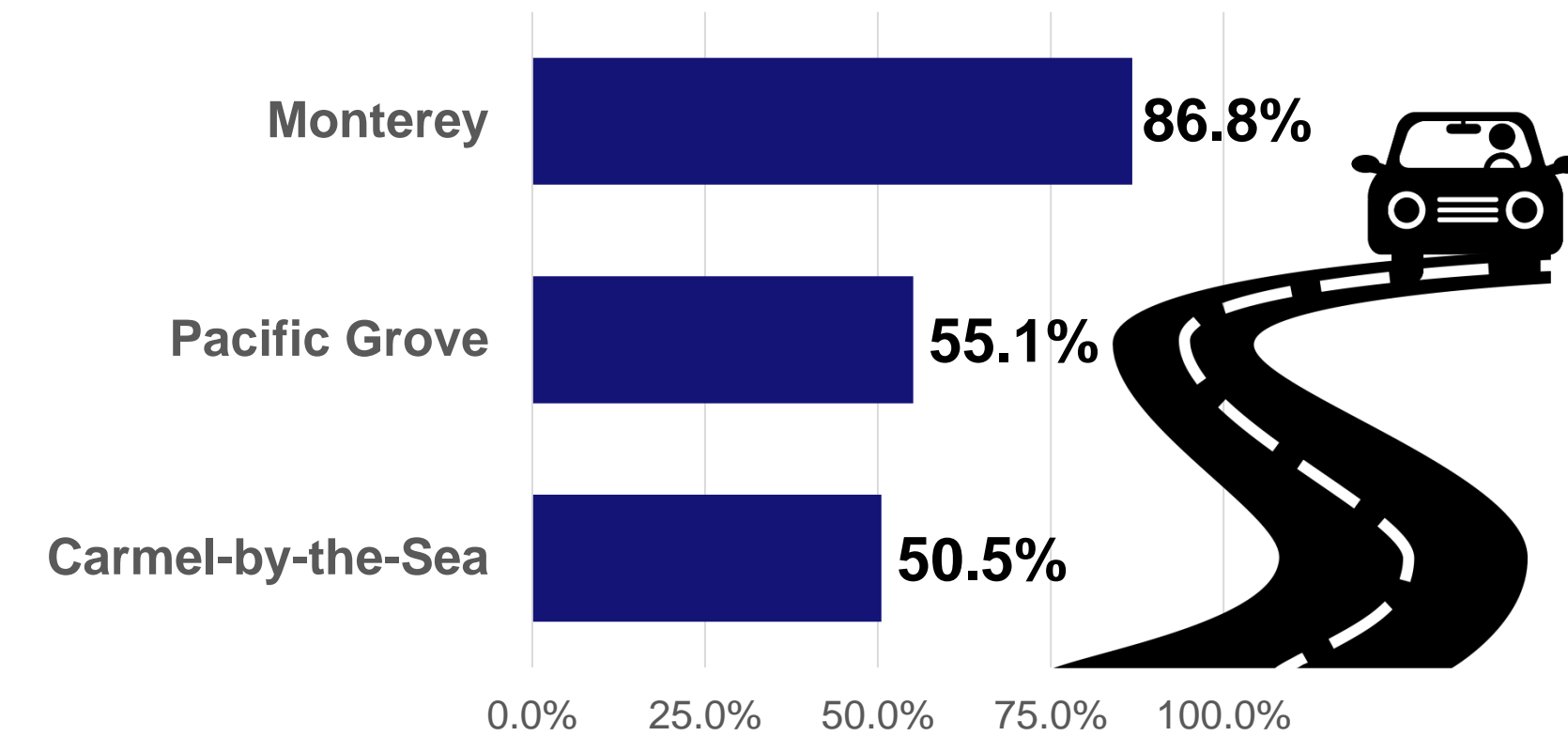
**Top Monterey County Activities** (% of respondents who reported participating in each activity)



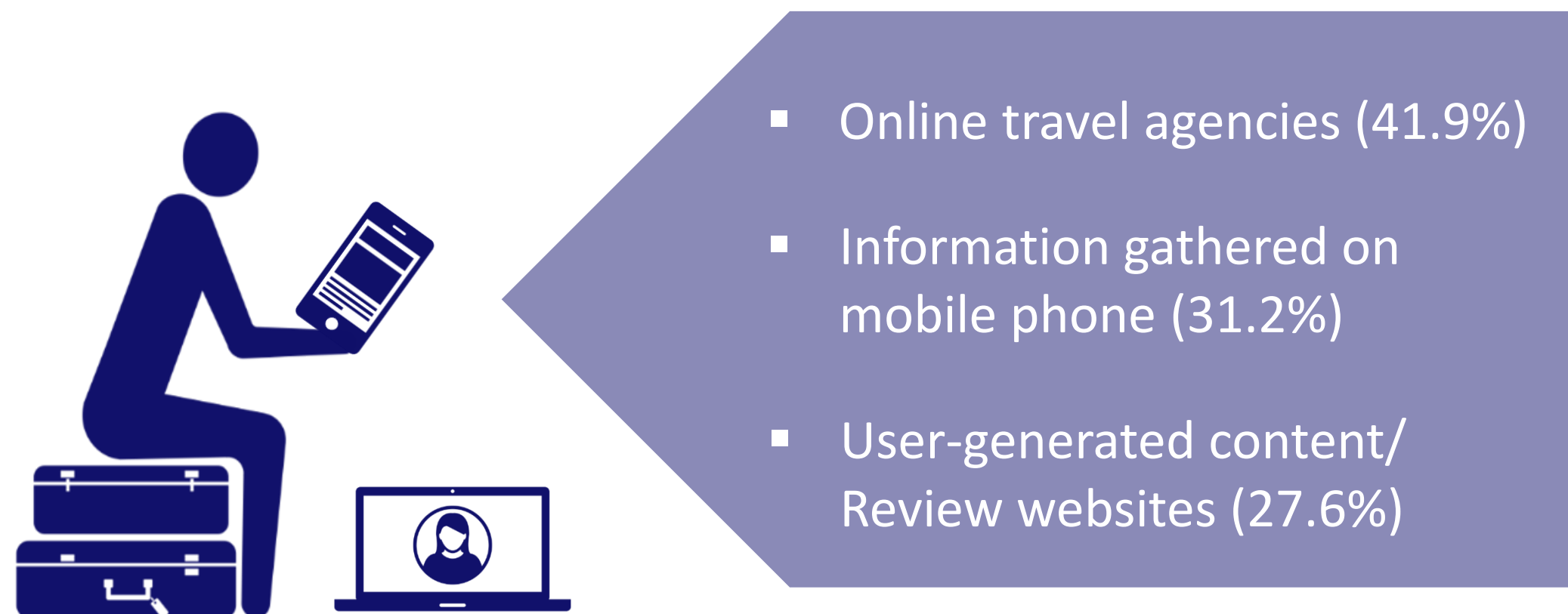
**Top Attractions Visited** (% of respondents)



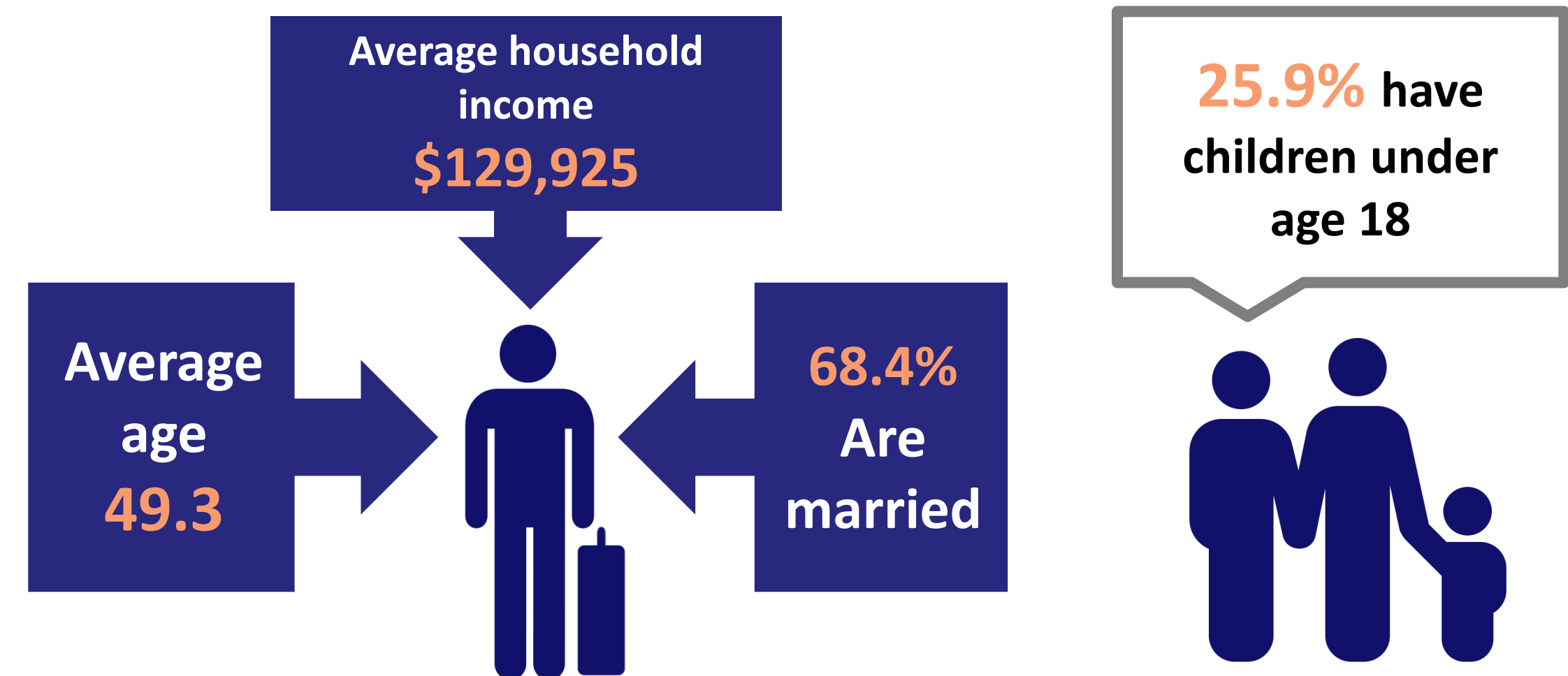
**Monterey County Areas Visited** (% of respondents)



**Top Travel Planning Resources** (combined in-market & out of market usage) (% of respondents)



**Lodging Guest Demographics** (% of respondents)



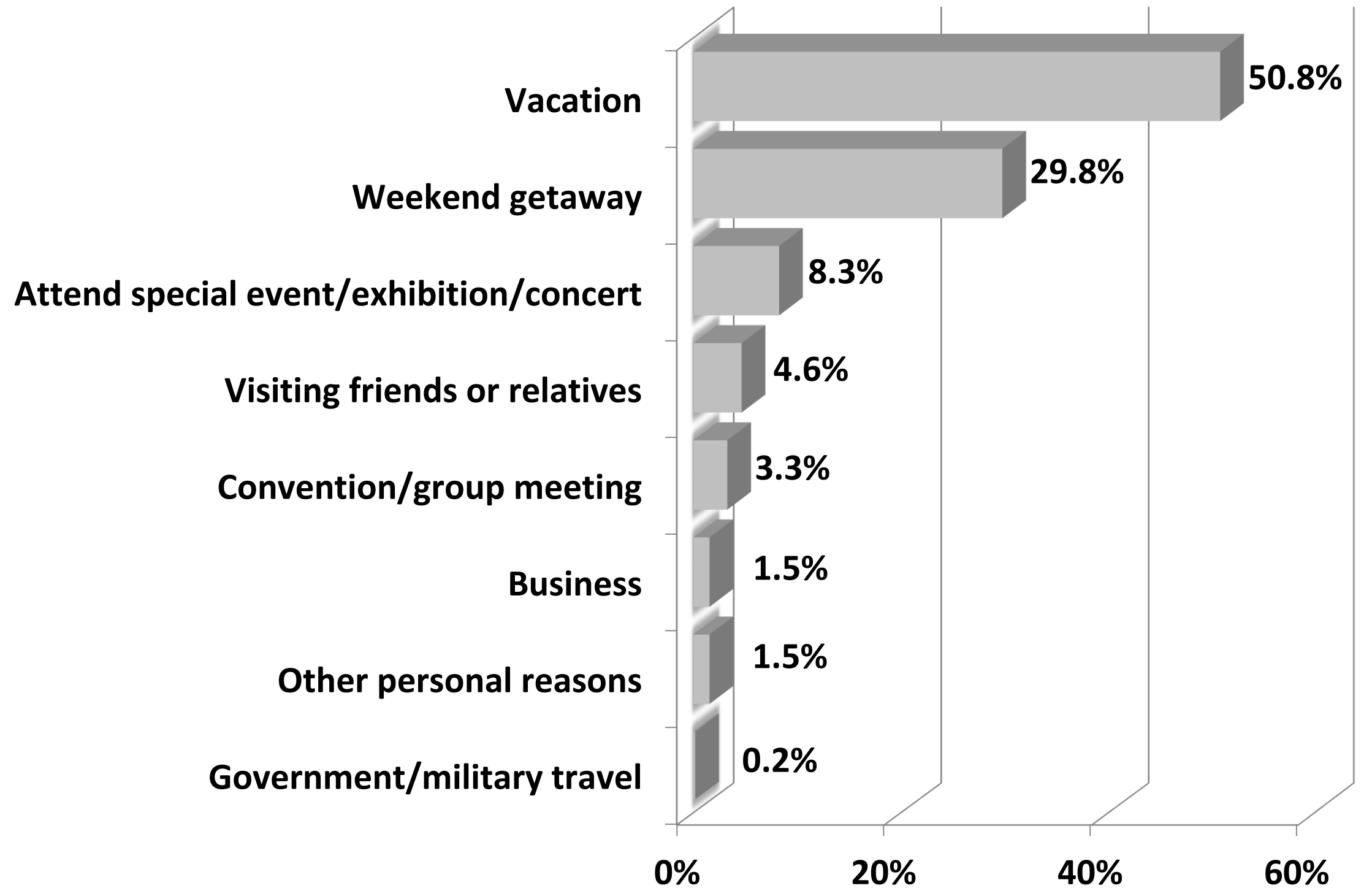


# DETAILED FINDINGS

# Primary Reason for Monterey County Trip

The vast majority of Monterey County lodging guest visitors surveyed came to the destination for leisure purposes. Half of this group was in the area for a vacation (50.8%), 29.8 percent were visiting for a weekend getaway and 8.3 percent were in the County to attend a special event.

Chart 1: Primary Reason for Monterey County Trip



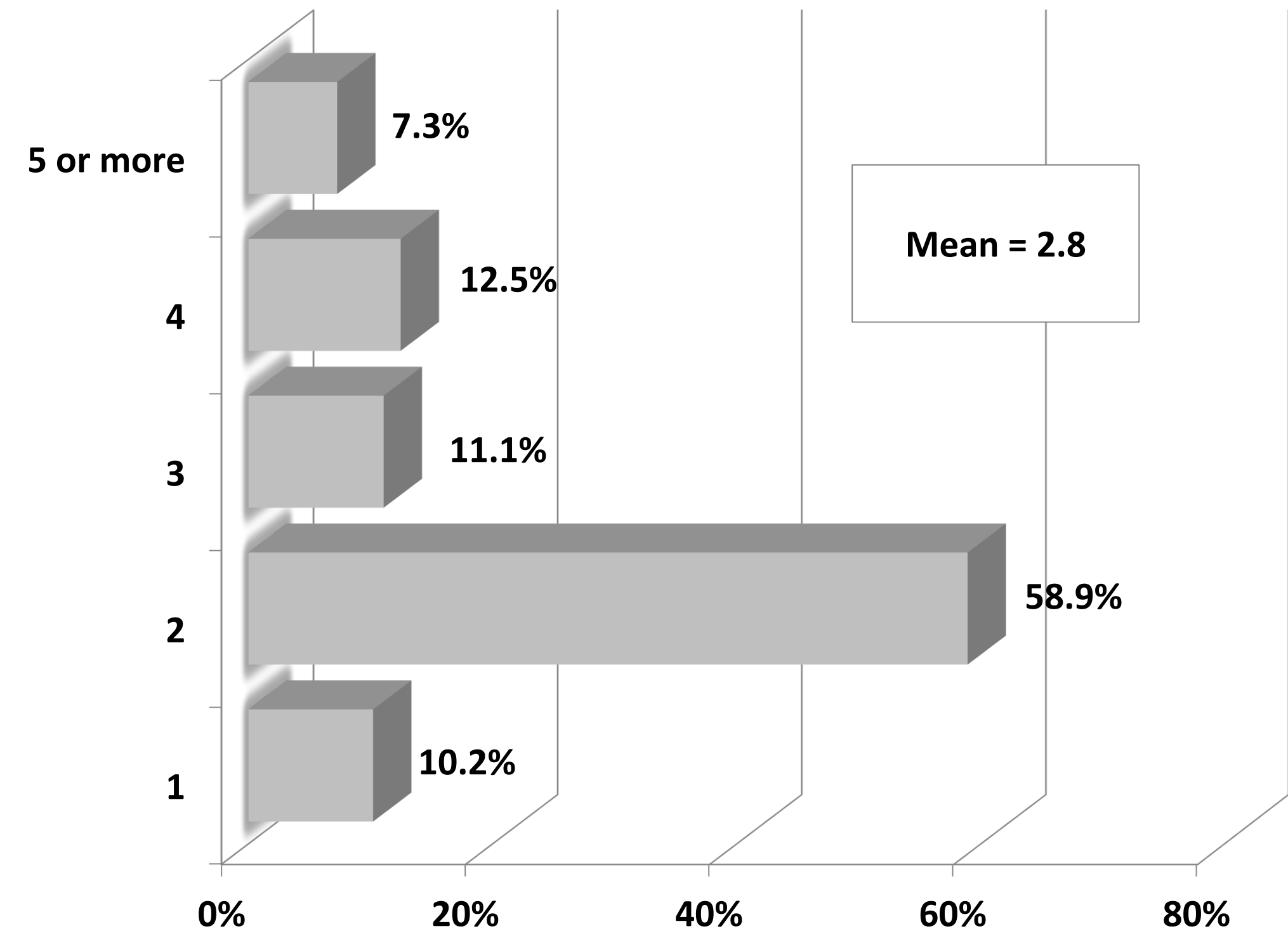
Question: What is your primary reason for visiting Monterey County?  
Base: Respondents who stayed in paid lodging in Monterey County. 411 completed surveys

# Number of People in Hotel Room

The largest proportion of survey respondents staying overnight in a hotel had one other room companion. Over half of these visitors reported that there were two people who stayed in their hotel room (58.9%). Ten percent were the sole occupant of their hotel room (10.2%). The average number of people per hotel room is 2.8.

Question: Including yourself, how many people stayed in your hotel room? Base: Respondents who stayed in paid lodging in Monterey County. 406 completed surveys.

Chart 2: Number of People in Hotel Room

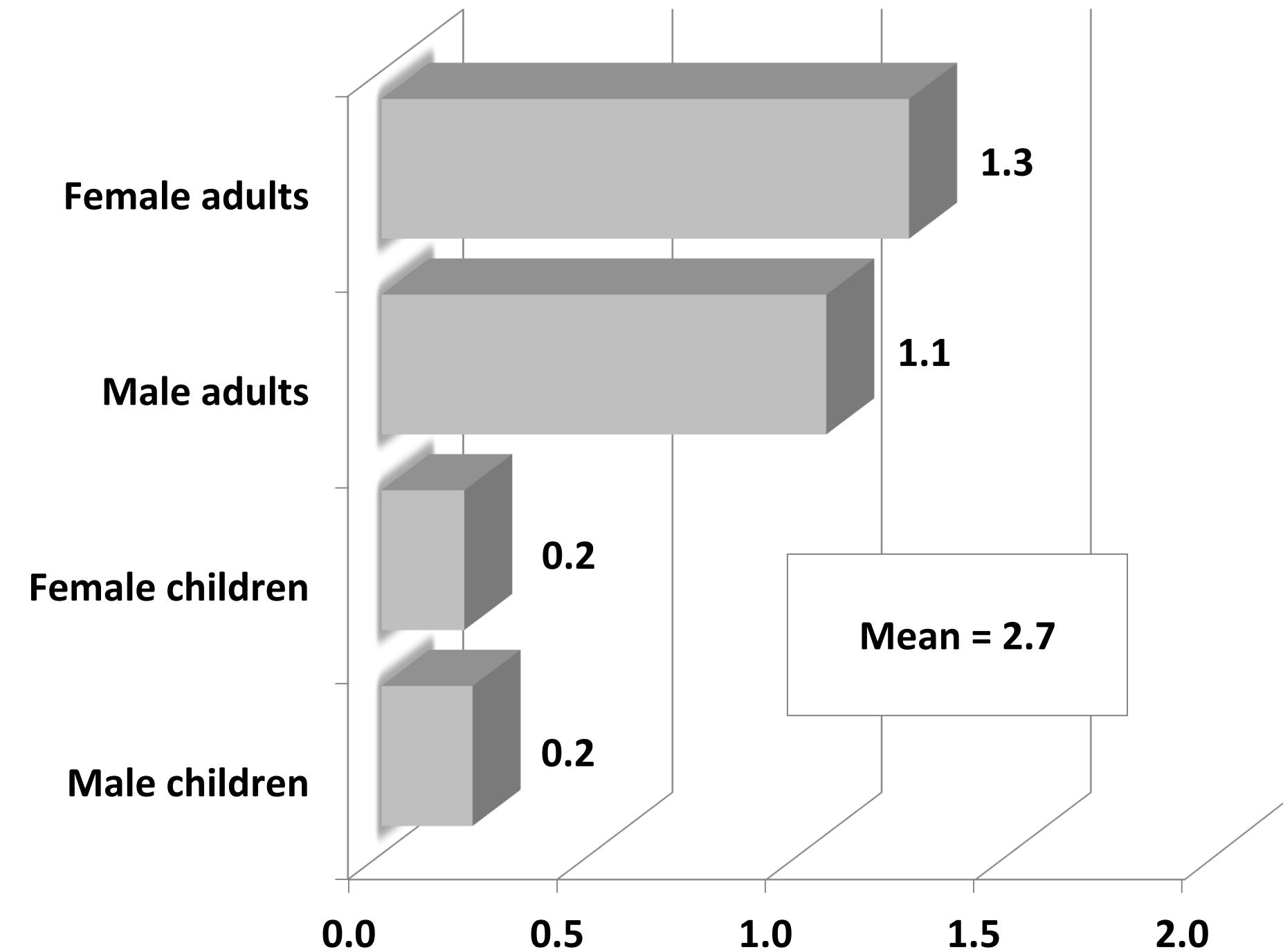


# Travel Party Composition

The typical lodging guest travel party to Monterey County was comprised of **2.7 persons**. This average travel party included 1.3 female and 1.1 male adults. 20.6 percent of travel parties included children under age 18.

Question: How many people of each type were in your immediate traveling party, including yourself? Base: Respondents who stayed in paid lodging in Monterey County. 406 completed surveys.

Chart 3: Travel Party Composition

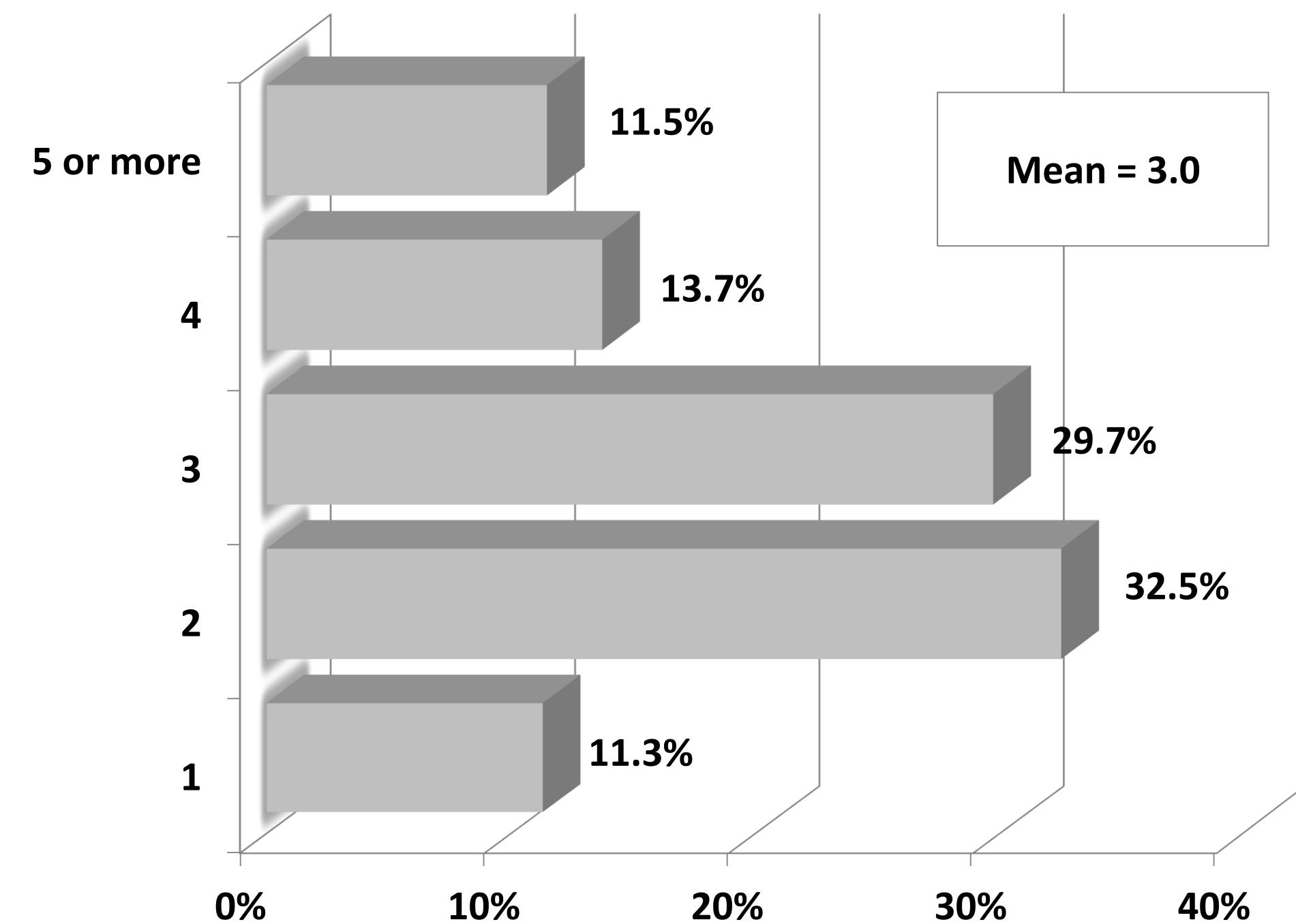


# Days in Monterey County

The average Monterey County lodging guest visitor surveyed spent 3.0 days in the county during their trip.

Question: How many total days and nights did you stay in Monterey County? Base: Respondents who stayed in paid lodging in Monterey County. 405 completed surveys.

Chart 4: Days in Monterey County

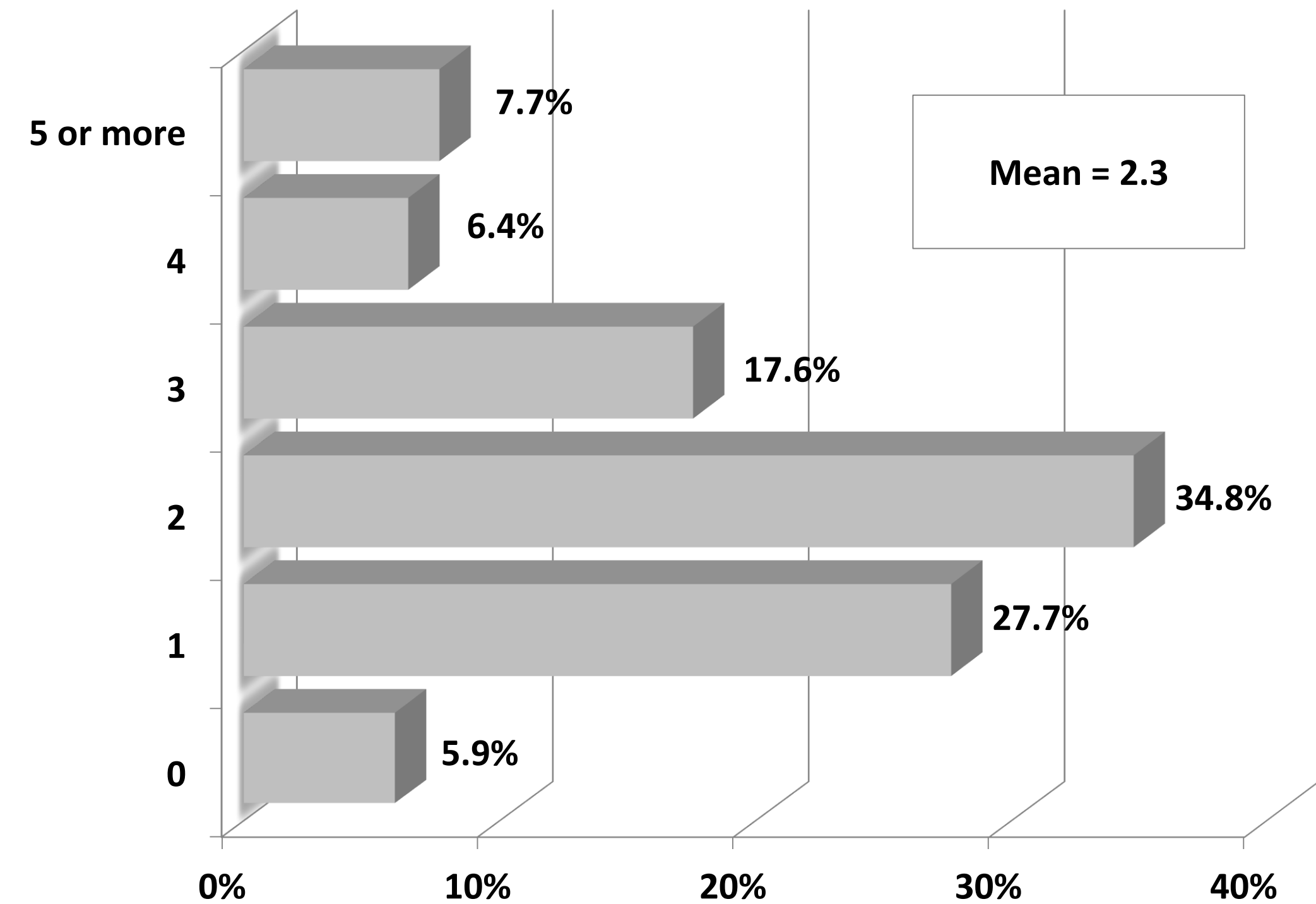


# Nights in Monterey County

The average Monterey County lodging guest visitor surveyed spent 2.3 nights in the county during their trip.

Question: How many total days and nights did you stay in Monterey County? Base: Respondents who stayed in paid lodging in Monterey County. 405 completed surveys.

Chart 5: Nights in Monterey County



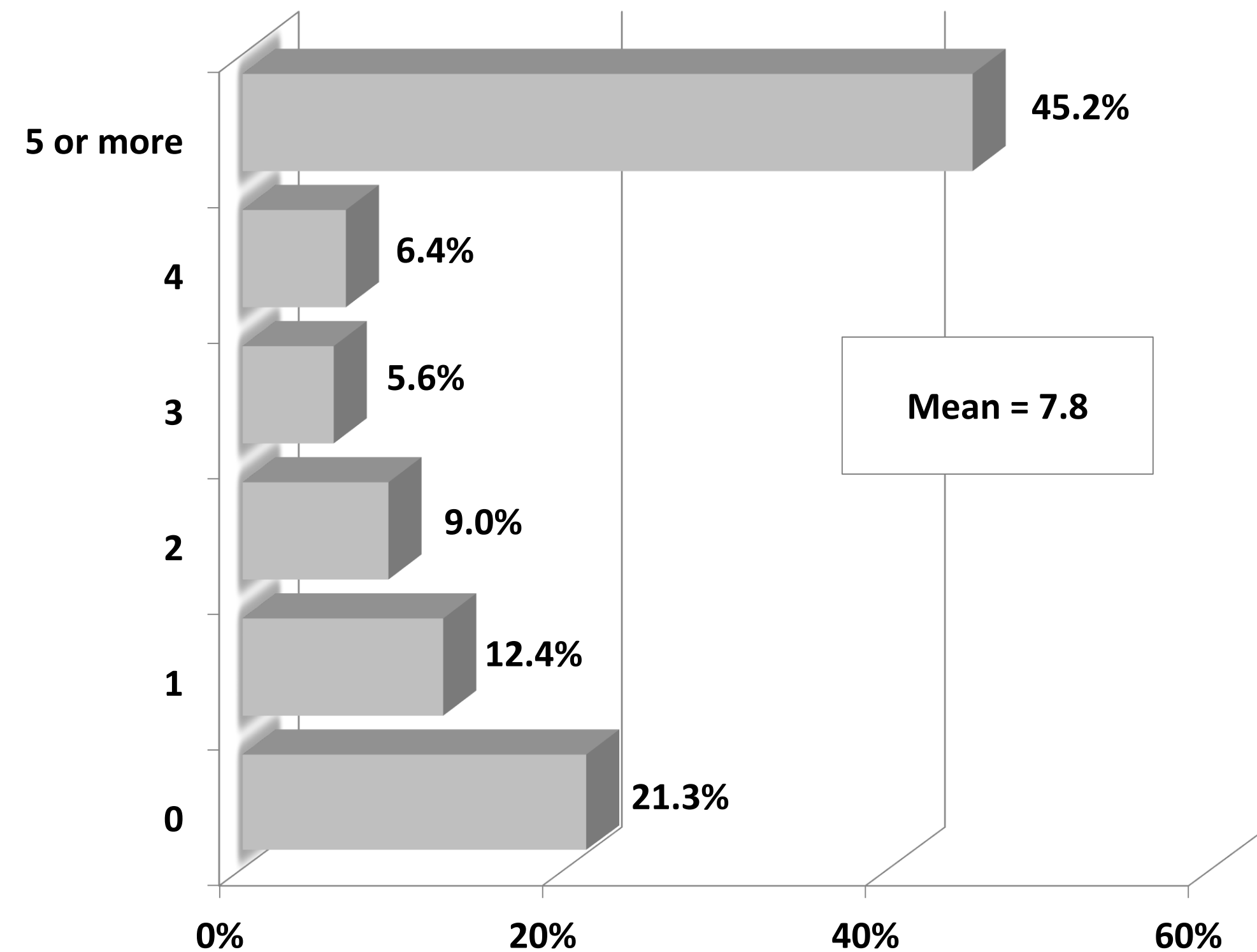


# Past Visitation to Monterey County

**Monterey County hosts a substantial proportion of repeat visitors.** 78.7 percent of lodging guest visitors surveyed reported having previously visited Monterey County. The average lodging guest visitor has made 7.8 trips to Monterey County previously.

Question: Prior to this visit, how many times have you been to Monterey County? Base: Respondents who stayed in paid lodging in Monterey County. 374 completed surveys.

Chart 6: Past Visitation to Monterey County

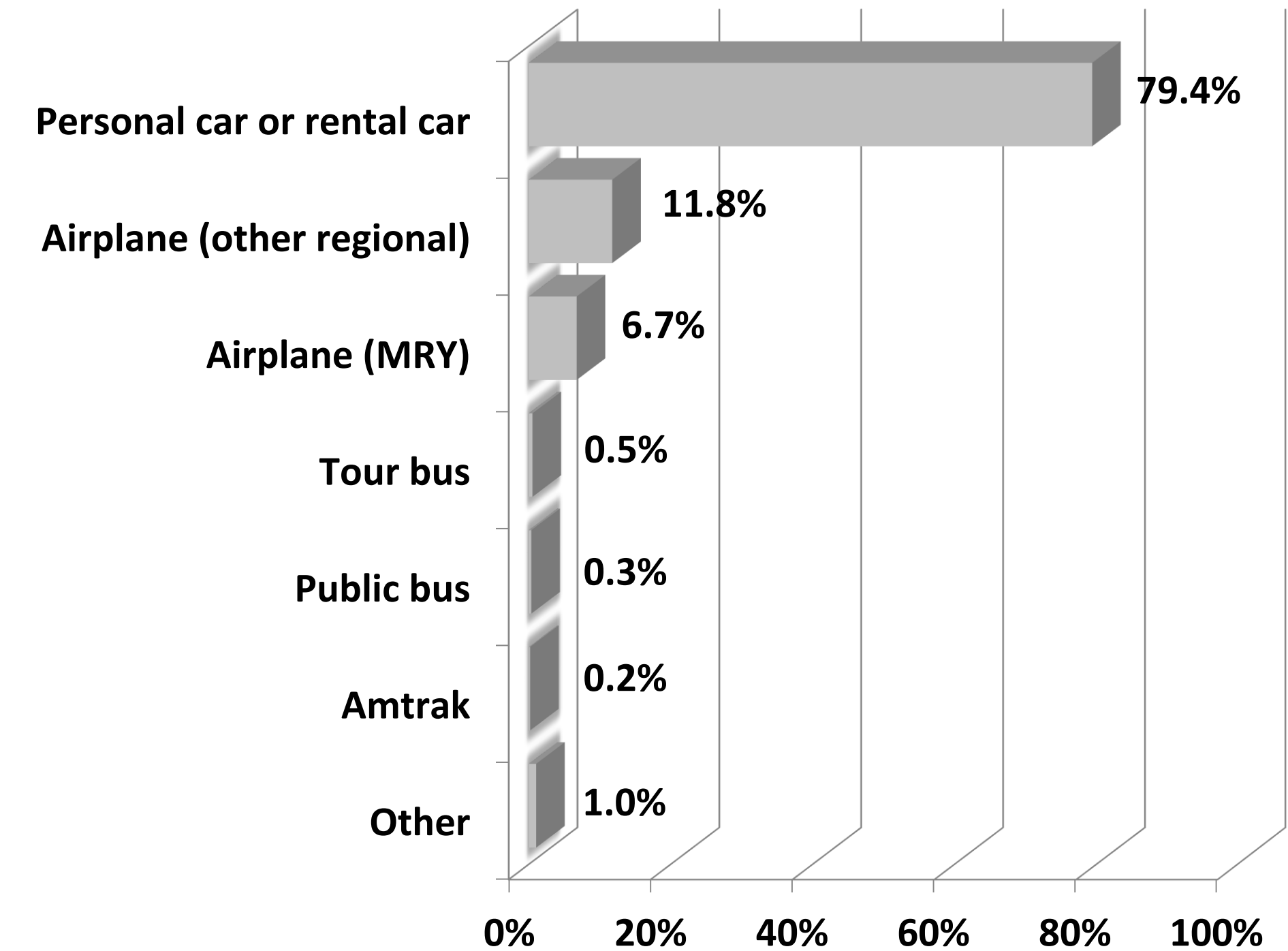


# Method of Arrival

Monterey County lodging guest visitors arrive by a variety of methods, with automobile being the most popular mode of transit (79.4%). The next most common method of arrival was flying into other regional airports (11.8%). 6.7 percent of lodging guest visitors surveyed arrived via Monterey Regional Airport.

Question: How did you arrive in the Monterey County area? (Select one) Base: Respondents who stayed in paid lodging in Monterey County. 407 completed surveys.

Chart 7: Method of Arrival

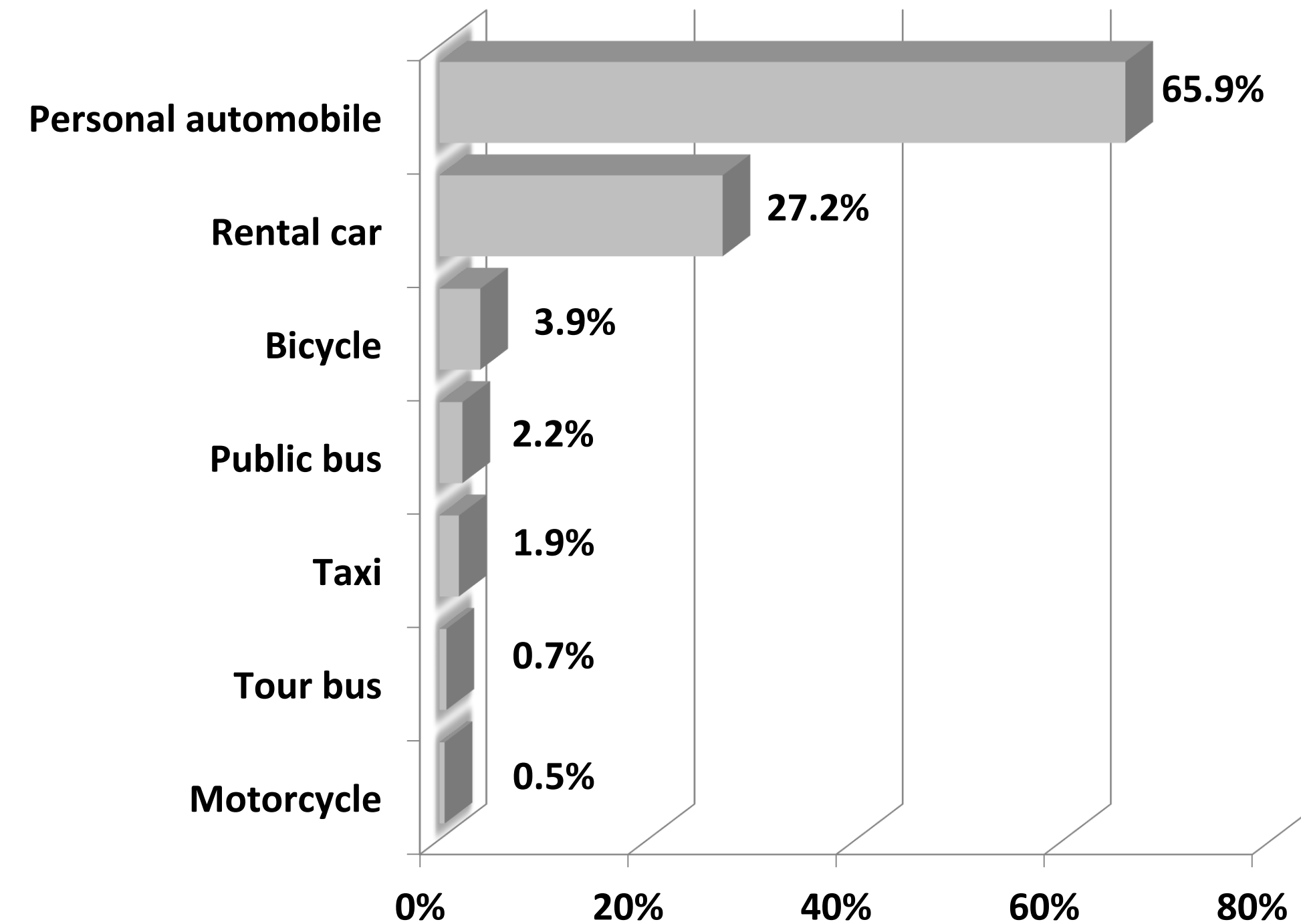


# Modes of Transportation

The use of a personal automobile was the most popular mode of transportation used in Monterey County, reported by 65.9 percent of lodging guests surveyed. 27.2 percent used a rental car while 3.9 percent rode a bicycle and an additional 2.2 percent used public transit.

Question: Which modes of transportation did you use while in Monterey County? (Select all that apply) Base: Respondents who stayed in paid lodging in Monterey County. 411 completed surveys.

Chart 8: Modes of Transportation

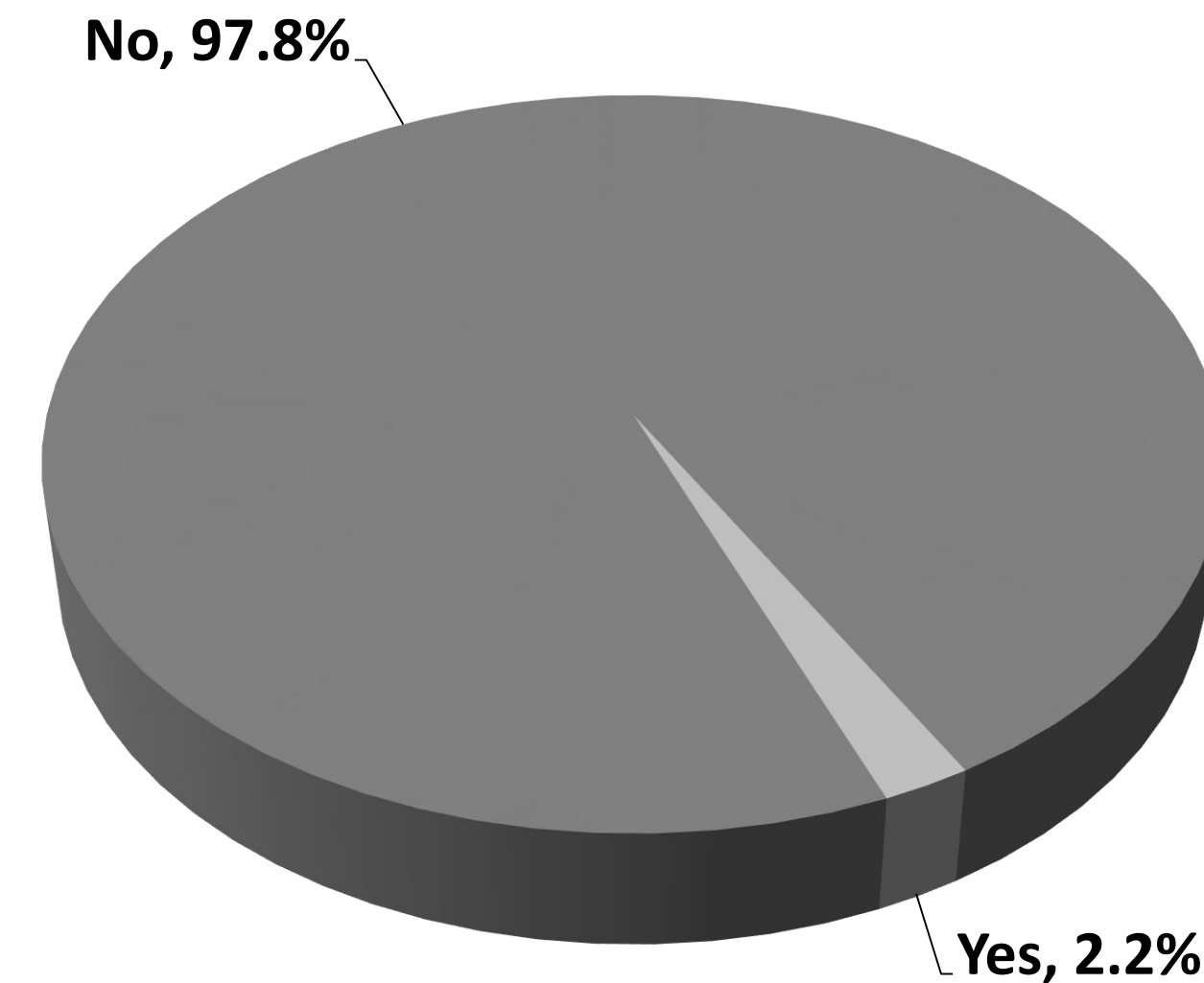


# Group Tour Visitors

In total, 2.2 percent of visitors lodging guests surveyed came to Monterey County as part of an escorted tour group.

Question: Were you in Monterey County on an escorted group tour?  
Base: Respondents who stayed in paid lodging in Monterey County. 292 completed surveys.

Chart 9: Group Tour Visitors

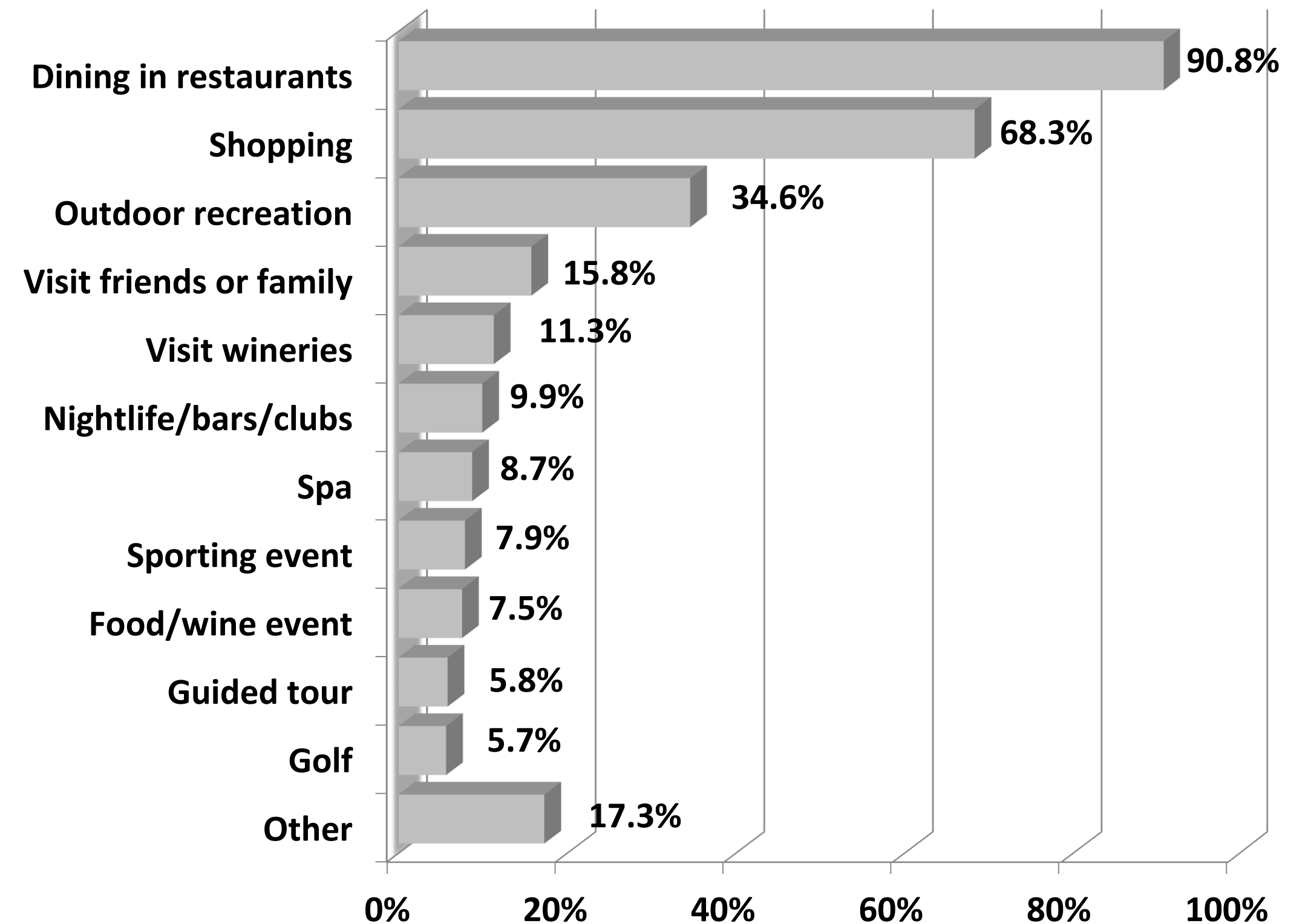


# Activities in Monterey County

Monterey County's lodging guest visitors engage in a myriad of activities during their trip. The most popular Monterey County activities participated in were dining in restaurants (90.8%), shopping (68.3%), outdoor recreation (34.6%) and visiting friends or family (15.8%).

Question: Which of these activities did you participate in while in Monterey County? (Select all that apply) Base: Respondents who stayed in paid lodging in Monterey County. 411 completed surveys.

Chart 10: Activities in Monterey County

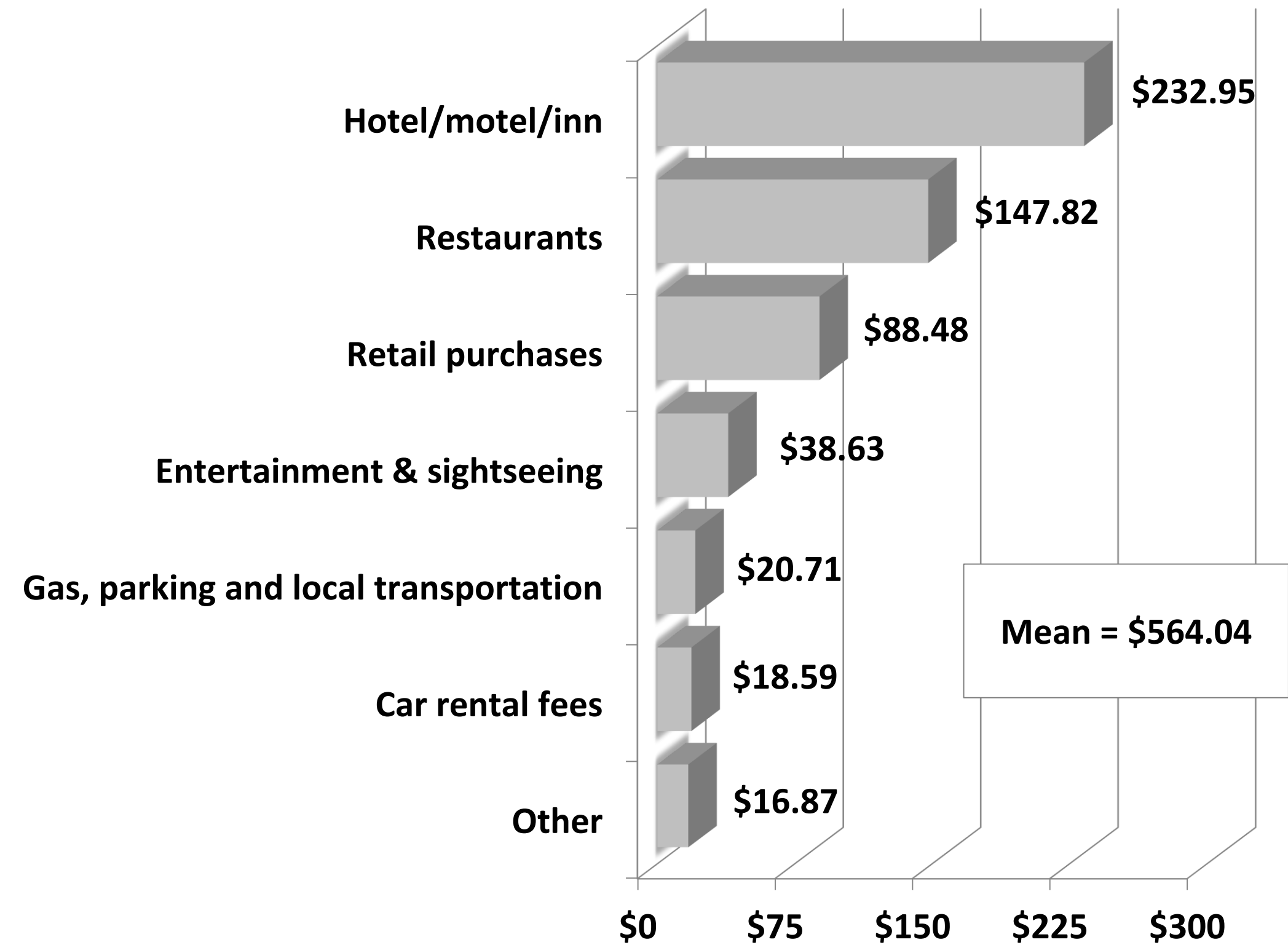


# Spending Per Day, Per Travel Party

The average Monterey County lodging guest travel party spent **\$564.04 per day during their trip**. The bulk of this spending is attributed to accommodations (\$232.95) and restaurants (\$147.82). Retail store purchases (\$88.48) and entertainment and sightseeing (\$38.63) were also top expenditures.

Question: PER DAY, approximately how much did you spend on each of the following while Monterey County? Base: Respondents who stayed in paid lodging in Monterey County. 398 completed surveys.

Chart 11: Spending Per Day, Per Travel Party

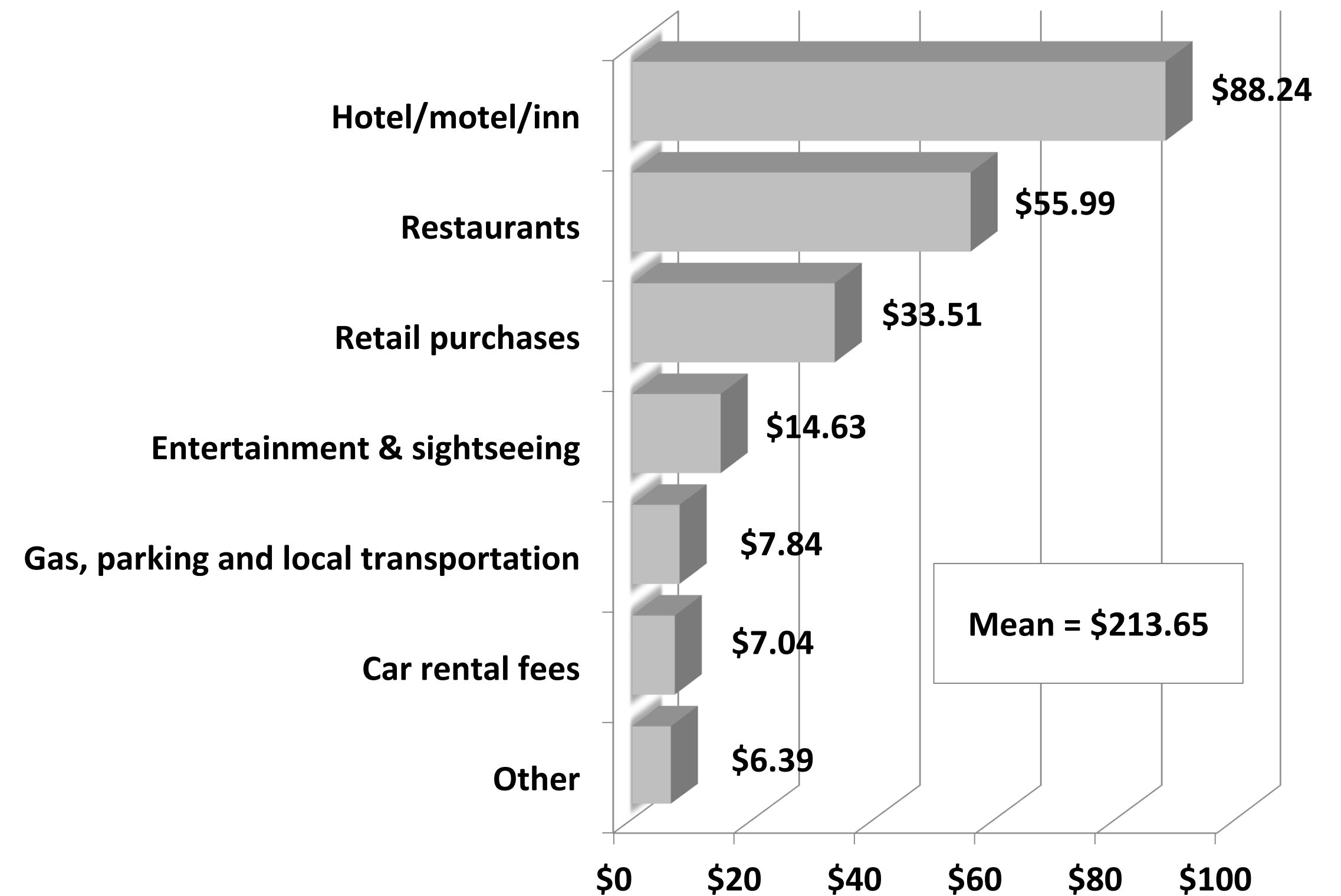


# Spending Per Day, Per Person

As the spending figures reported earlier cover an average of 2.6 people, it is estimated that the typical Monterey County lodging guest visitor represented \$213.65 in daily spending in the county.

Question: These expenses fully covered how many people (including yourself)? Base: Respondents who stayed in paid lodging in Monterey County. 387 completed surveys.

Chart 12: Spending Per Day, Per Person

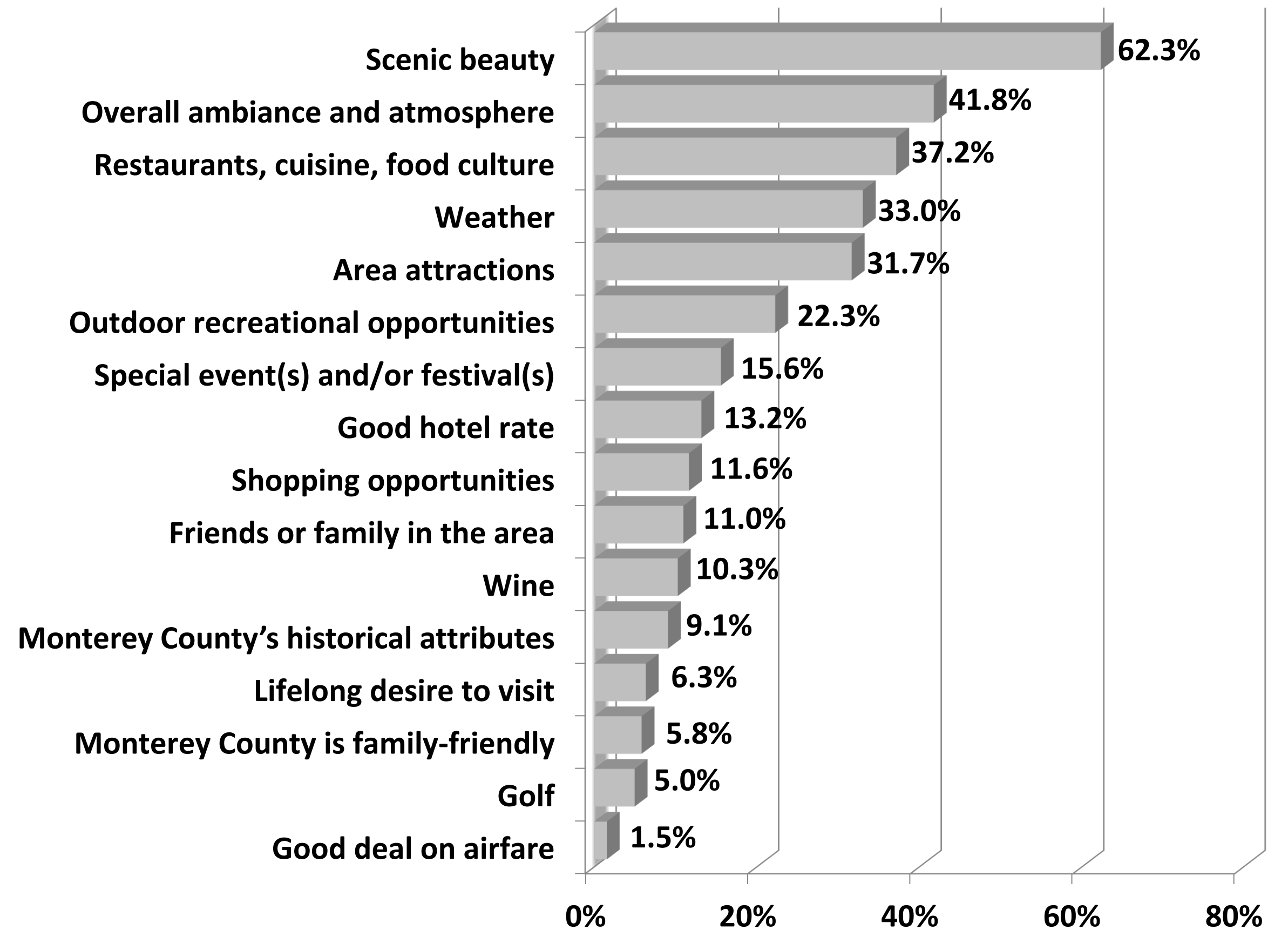


# Important Factors to Destination Decision

In total, 62.3 percent of lodging guest visitors reported that scenic beauty was important to their decision to travel to Monterey County. Other factors that were most important to visitors' decision to visit the county include Monterey County's overall ambiance (41.8%), restaurants (37.2%), weather (33.0%) and area attractions (31.7%).

Question: Which of the following were IMPORTANT to your decision to take this trip to Monterey County? (Select all that apply) Base: Respondents who stayed in paid lodging in Monterey County. 411 completed surveys.

Chart 13: Important Factors to Destination Decision



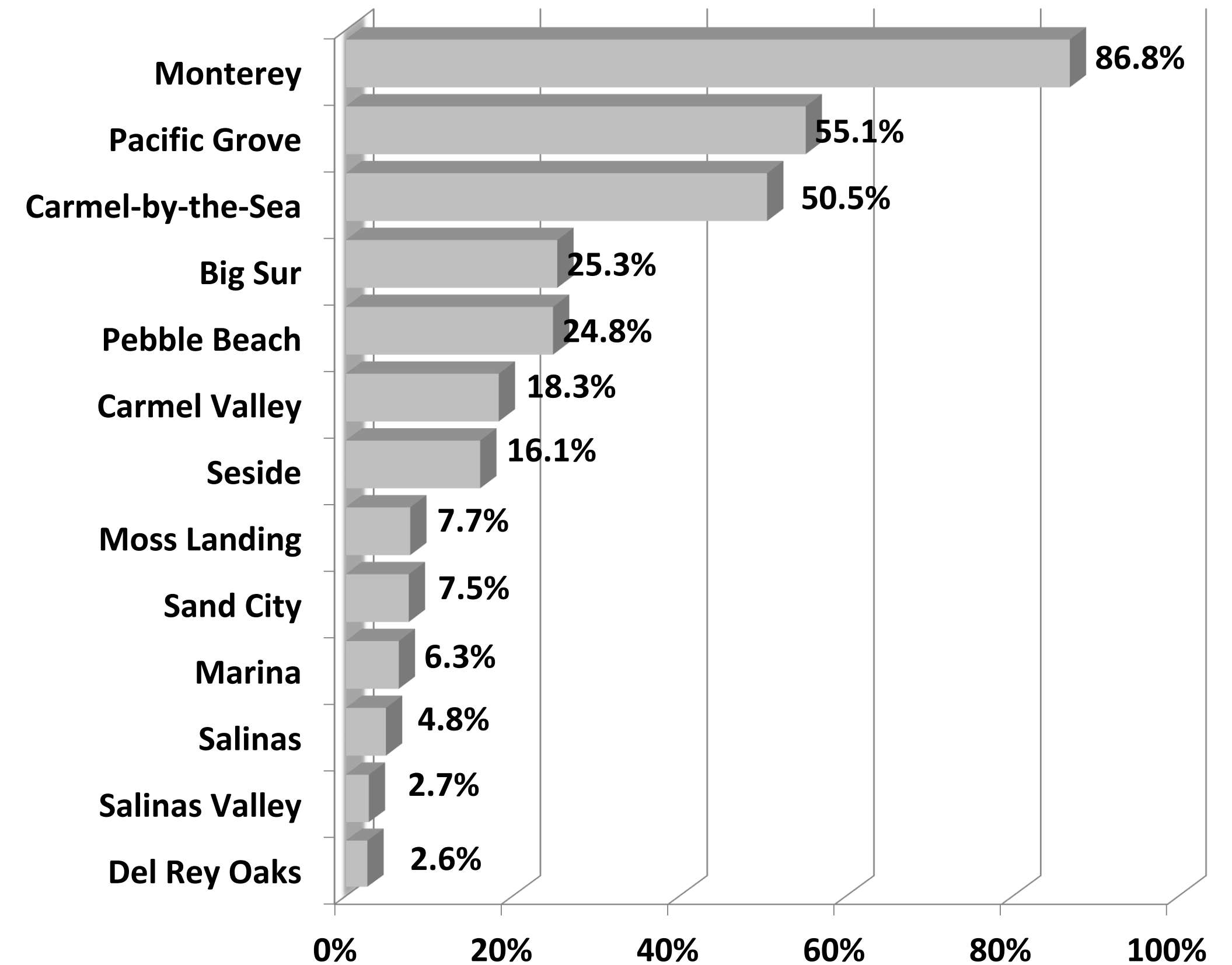


# Monterey County Areas Visited

The city of Monterey was the area of the county most frequented by lodging guest visitors during their Monterey County trips (86.8%). The next most visited areas by this group were Pacific Grove (55.1%), Carmel-by-the-Sea (50.5%) and Big Sur (25.3%).

Question: Which of these Monterey County areas did you visit on this trip? (Select all that apply) Base: Respondents who stayed in paid lodging in Monterey County. 411 completed surveys.

Chart 15: Monterey County Areas Visited

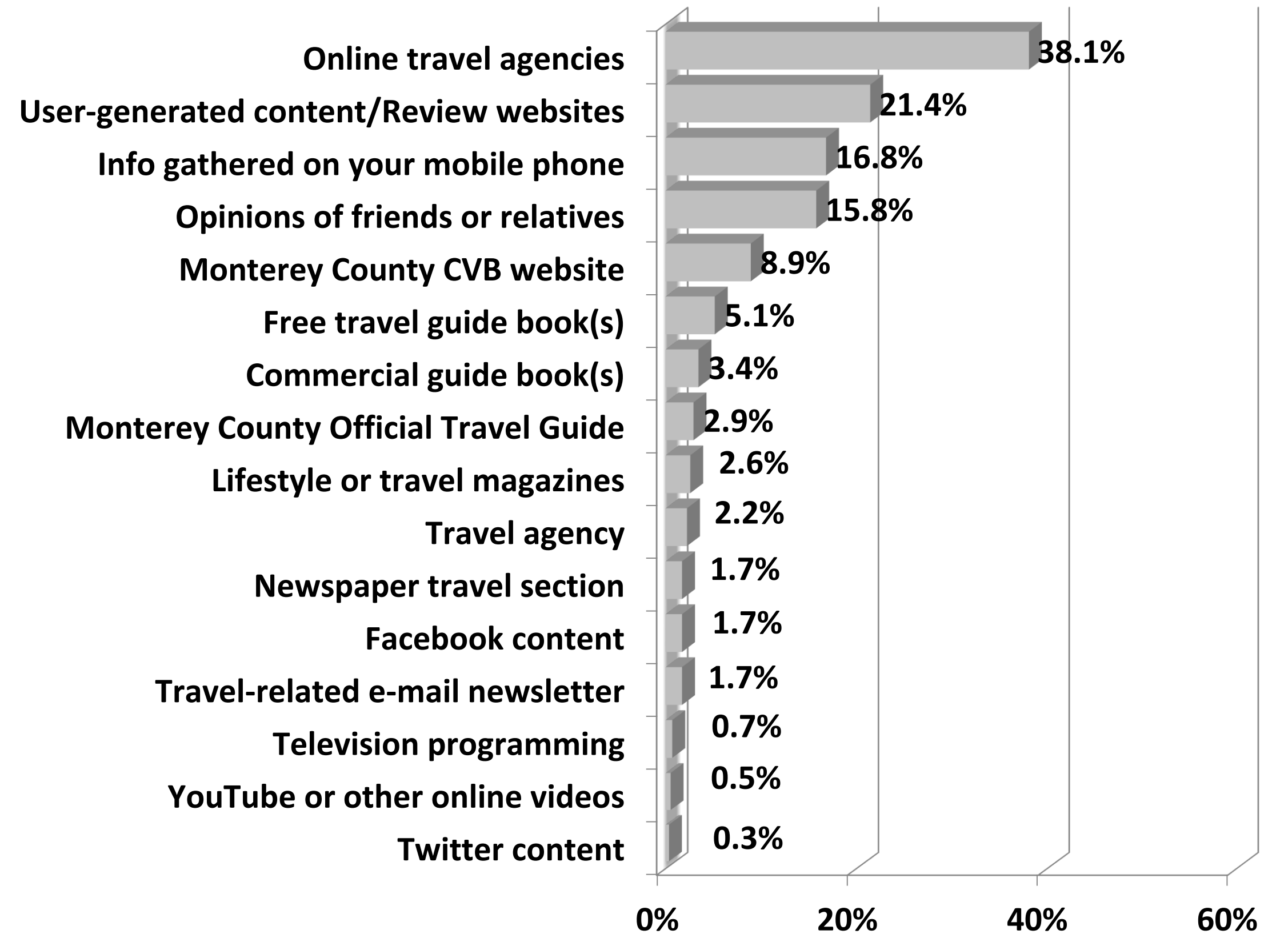


# Resources Used Before Arrival

In total, **38.1 percent** of lodging guest visitors surveyed used online travel agencies to plan their trip prior to arriving in Monterey County. One in five also used review websites (21.4%). 16.8 percent gathered information on their mobile phone and 15.8 percent used the opinions of friends or relatives. 8.9 percent utilized the official Monterey County CVB website and 2.9 percent utilized the Monterey County Official Travel Guide.

Question: Which of the following resources did you use to plan your Monterey County trip BEFORE ARRIVING and which did you use WHILE IN THE COUNTY? Base: Respondents who stayed in paid lodging in Monterey County. 410 completed surveys.

Chart 16: Resources Used Before Arrival

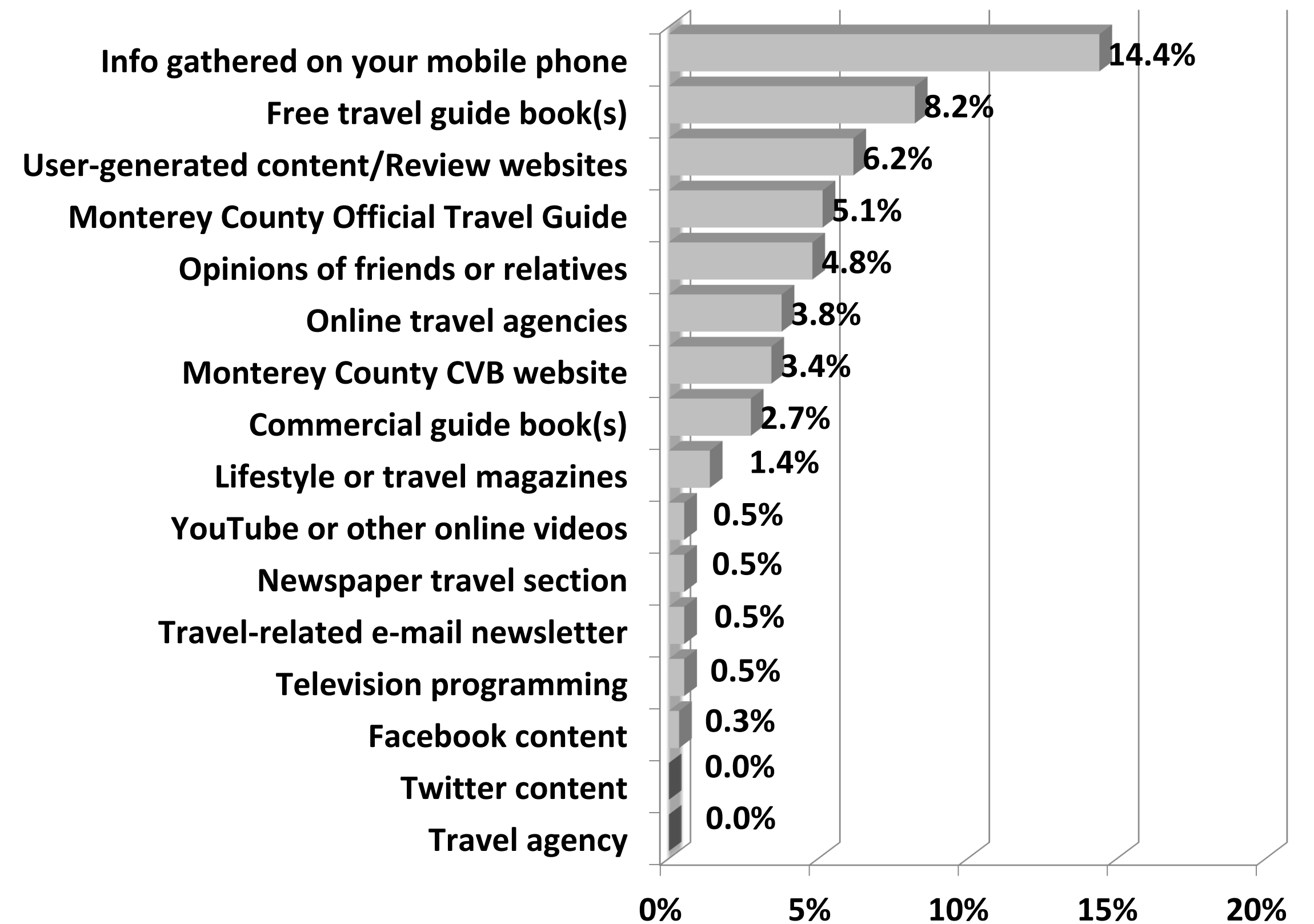


# Resources Used In-Market

While in Monterey County, 14.4 percent of lodging guests surveyed gathered trip planning information from their mobile phone, while an additional 8.2 percent used free travel guide books. 5.1 percent of this group accessed the Monterey County Official Travel Guide in-market.

Question: Which of the following resources did you use to plan your Monterey County trip BEFORE ARRIVING and which did you use WHILE IN THE COUNTY? Base: Respondents who stayed in paid lodging in Monterey County. 410 completed surveys.

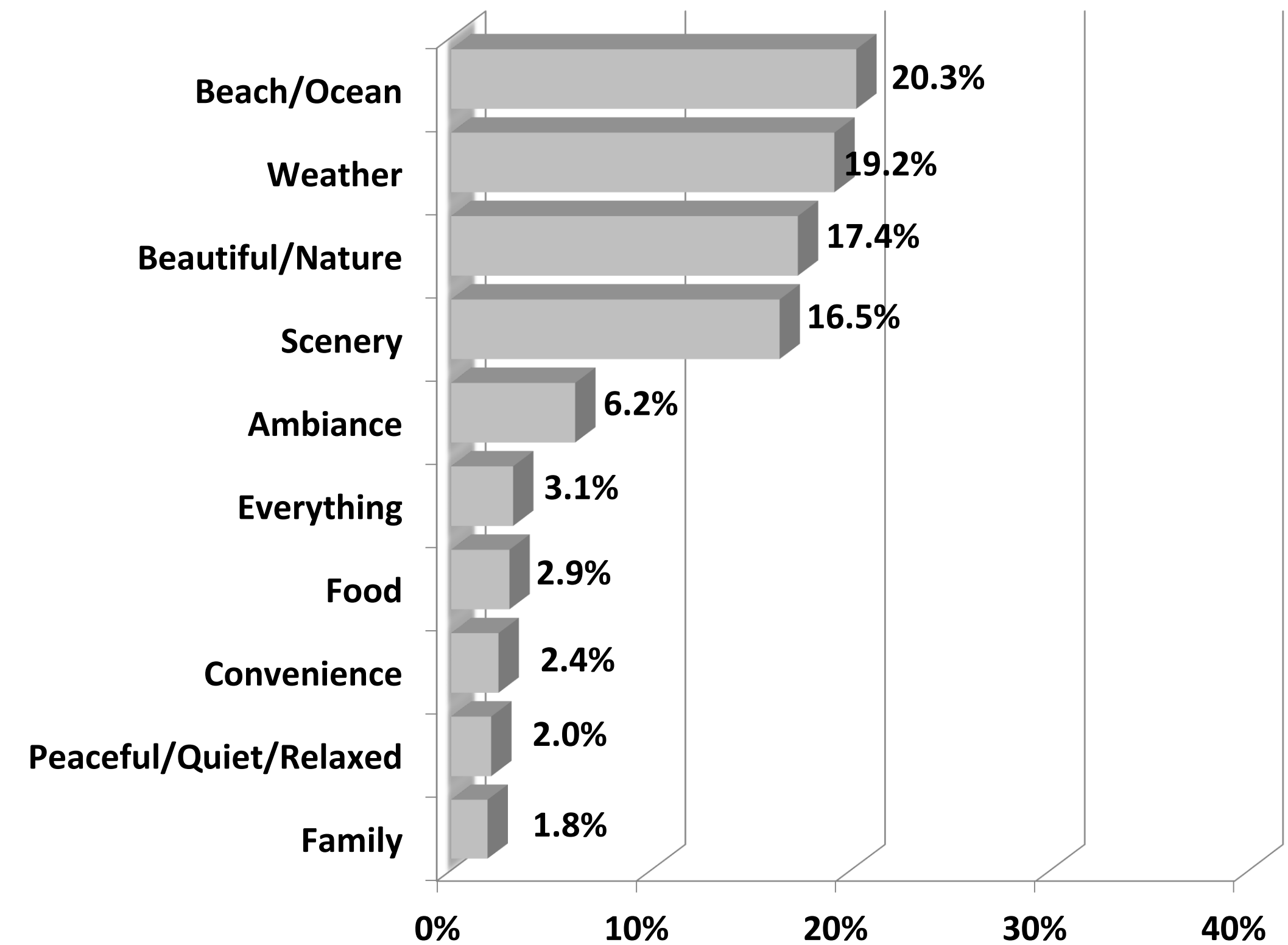
Chart 17: Resources Used In-Market



# Most Liked Aspects of Monterey County

Overall, Monterey County's natural assets are the most liked aspects of the destination. In an open-ended question, visitors were asked what they liked most about Monterey County. The top ten most common responses are shown in the chart to the right. Amongst these, beach/ocean (20.3%), great weather (19.2%), nature (17.4%) and the area's scenery (16.5%) dominated.

Chart 18: Most Liked Aspects of Monterey County



Question: What do you like most about Monterey County? Base: Respondents who stayed in paid lodging in Monterey County. 385 completed surveys.

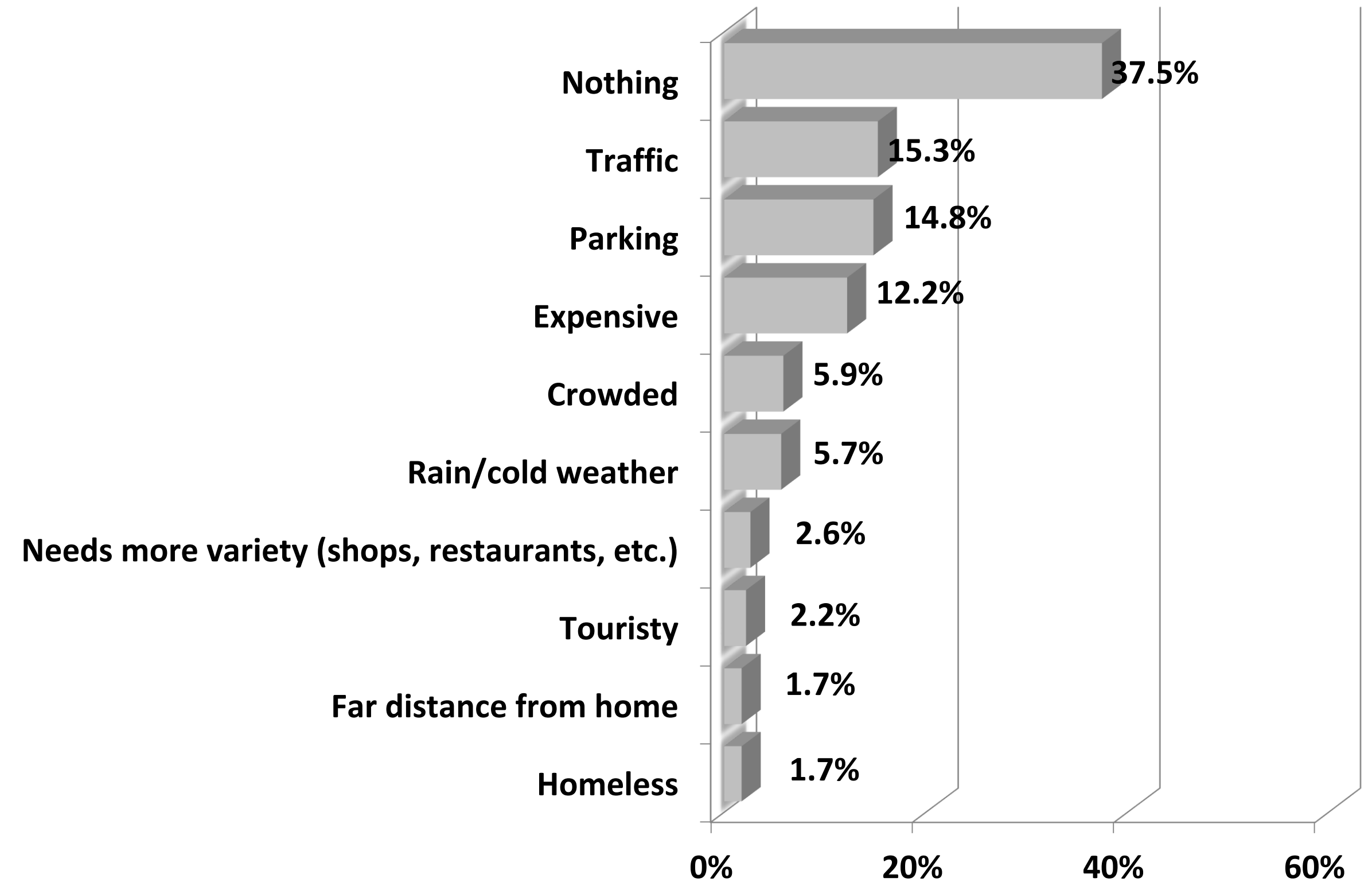
# Least Liked Aspects of Monterey County

When asked to share what they least like about Monterey County, 37.5 percent of lodging guests surveyed said “nothing.”

Of the specific responses provided, approximately 15 percent report that they least liked traffic (15.3%) and parking or parking fees (14.8%).

Question: What do you like least about Monterey County? Base: Respondents who stayed in paid lodging in Monterey County. 323 completed surveys.

Chart 19: Least Liked Aspects of Monterey County

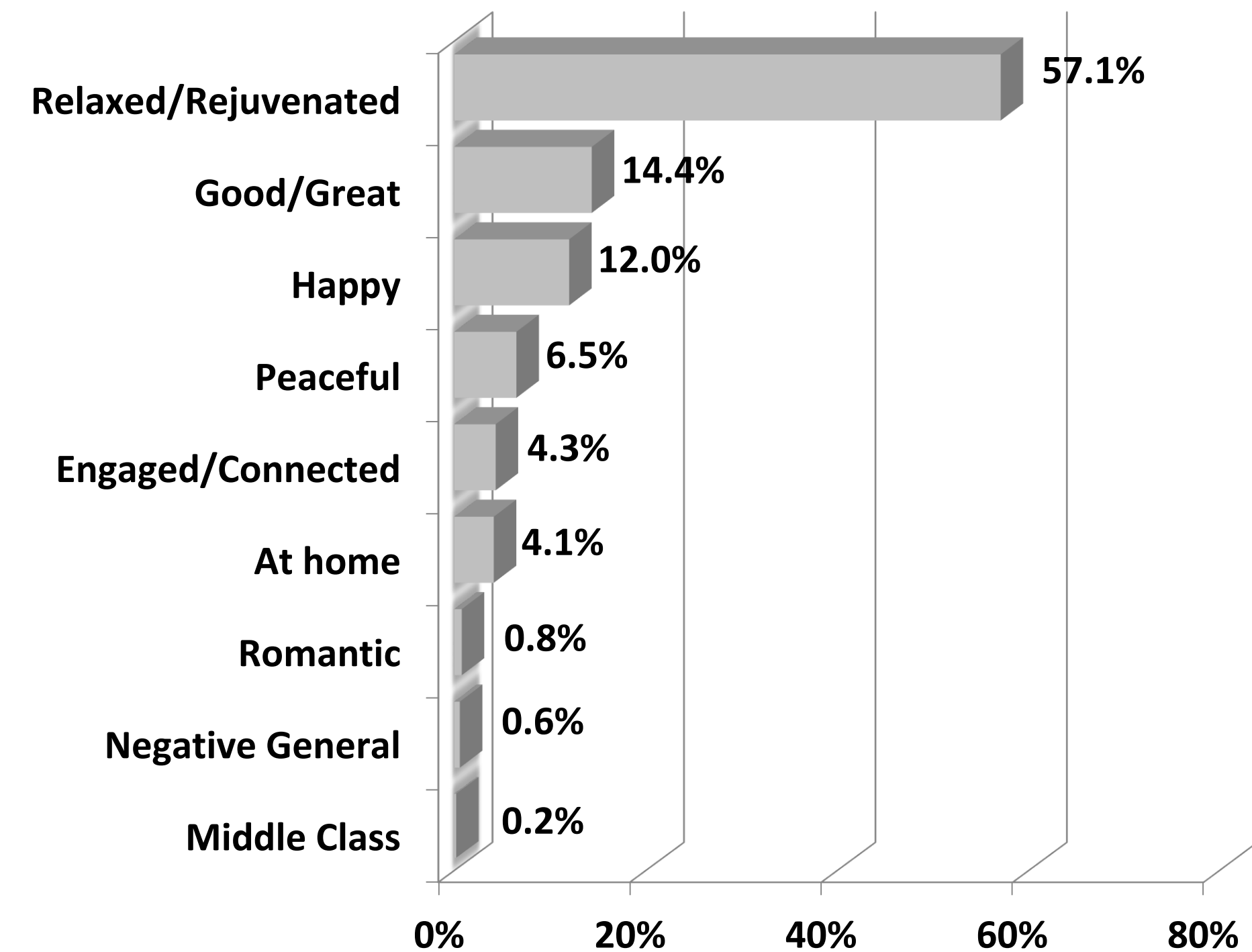


# Feeling in Monterey County

Over half of Monterey County lodging guests surveyed feel “relaxed” or “rejuvenated” while in the destination (57.1%). In an open-ended question, respondents were asked to state how they feel when in Monterey County. “Relaxed” or “rejuvenated” is, by far, the most common feeling. This is followed by “good/great” (14.4%) and “happy” (12.0%).

Question: In a few words, how do you feel when you are in Monterey County? Base: Respondents who stayed in paid lodging in Monterey County. 357 completed surveys.

Chart 20: Feeling in Monterey County

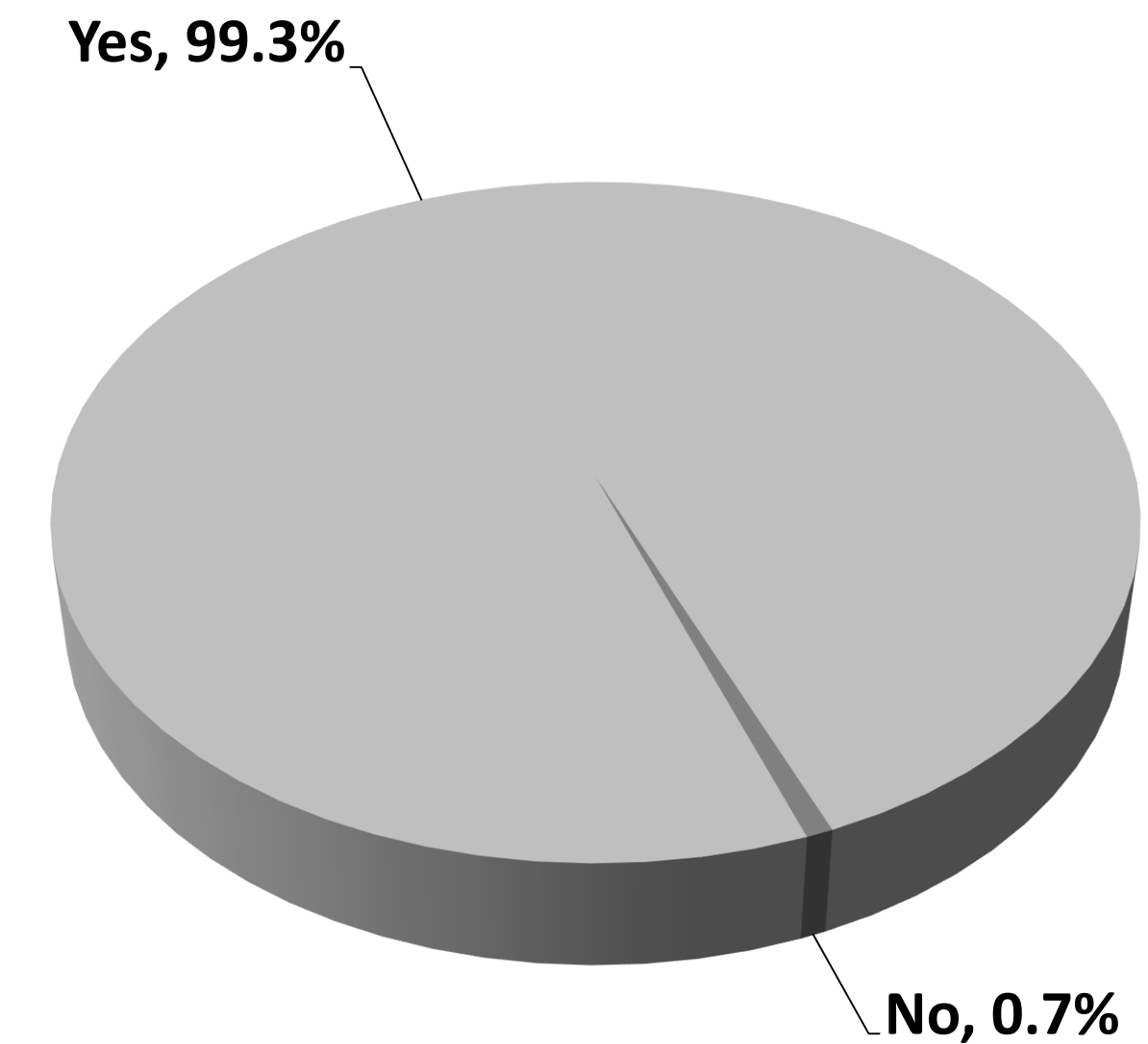


# Return to Monterey County

**Monterey County appears to provide a highly satisfactory visitor experience.** Nearly all lodging guests surveyed, 99.3 percent, reported that they would return to Monterey County.

Question: Would you return to Monterey County? Base: Respondents who stayed in paid lodging in Monterey County. 393 completed surveys.

Chart 22: Return to Monterey County



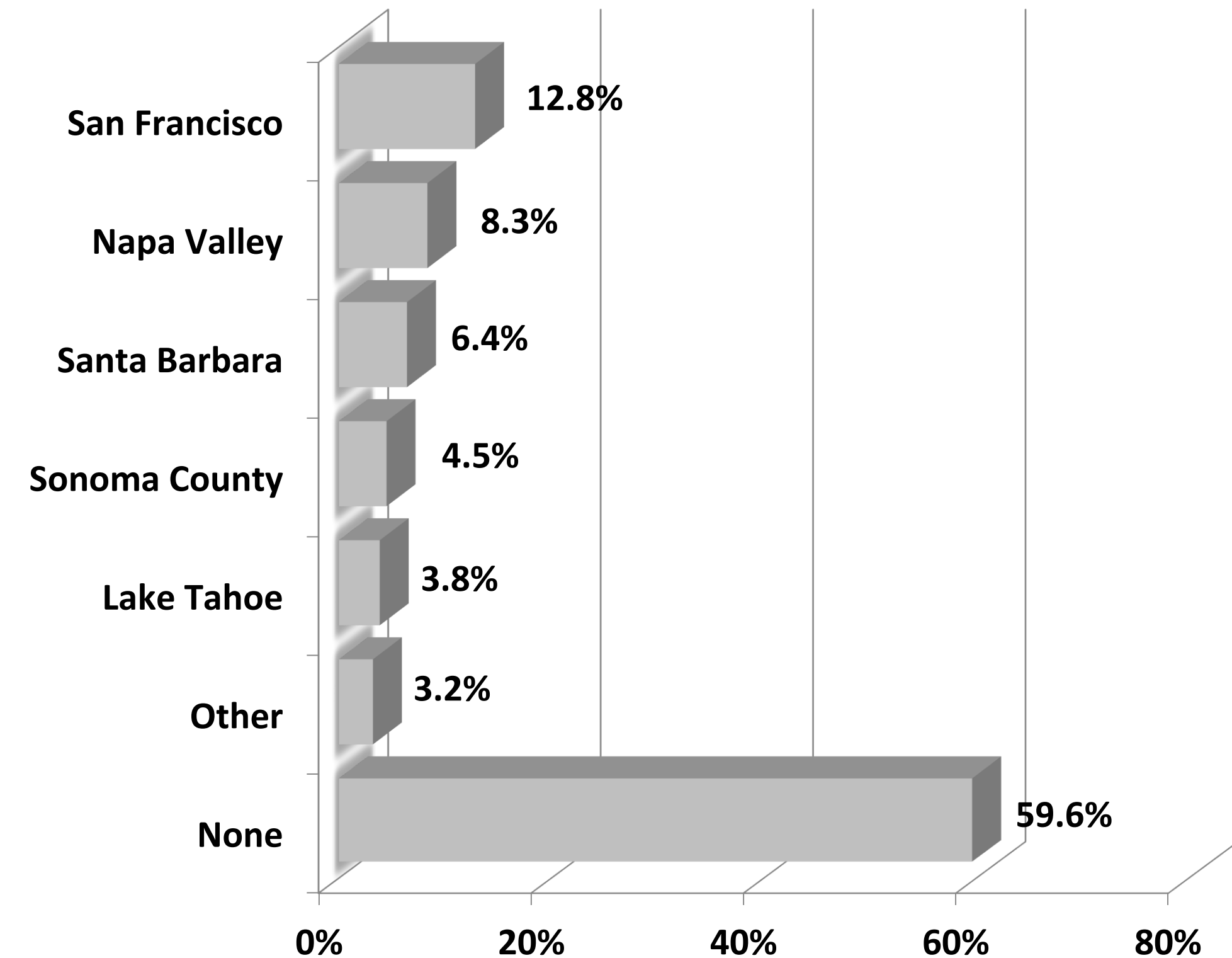
# Other Destinations Considered

Approximately 60 percent of lodging guests surveyed did not consider major competing destinations when they made the decision to visit Monterey County (59.6%). Lodging guests surveyed were presented a list of competitive destinations and asked which they also considered before arriving at the decision to visit Monterey County. 12.8 percent had considered visiting San Francisco and 8.3 percent considered visiting Napa Valley.

Note: This question was only asked of respondents in the Visitor Intercept Survey during Q3 and Q4.

Question: Which of the following did you also consider visiting for this trip, before choosing Monterey County? (Select all that apply) Base: Respondents who stayed in paid lodging in Monterey County. 110 completed surveys.

Chart 23: Return to Monterey County







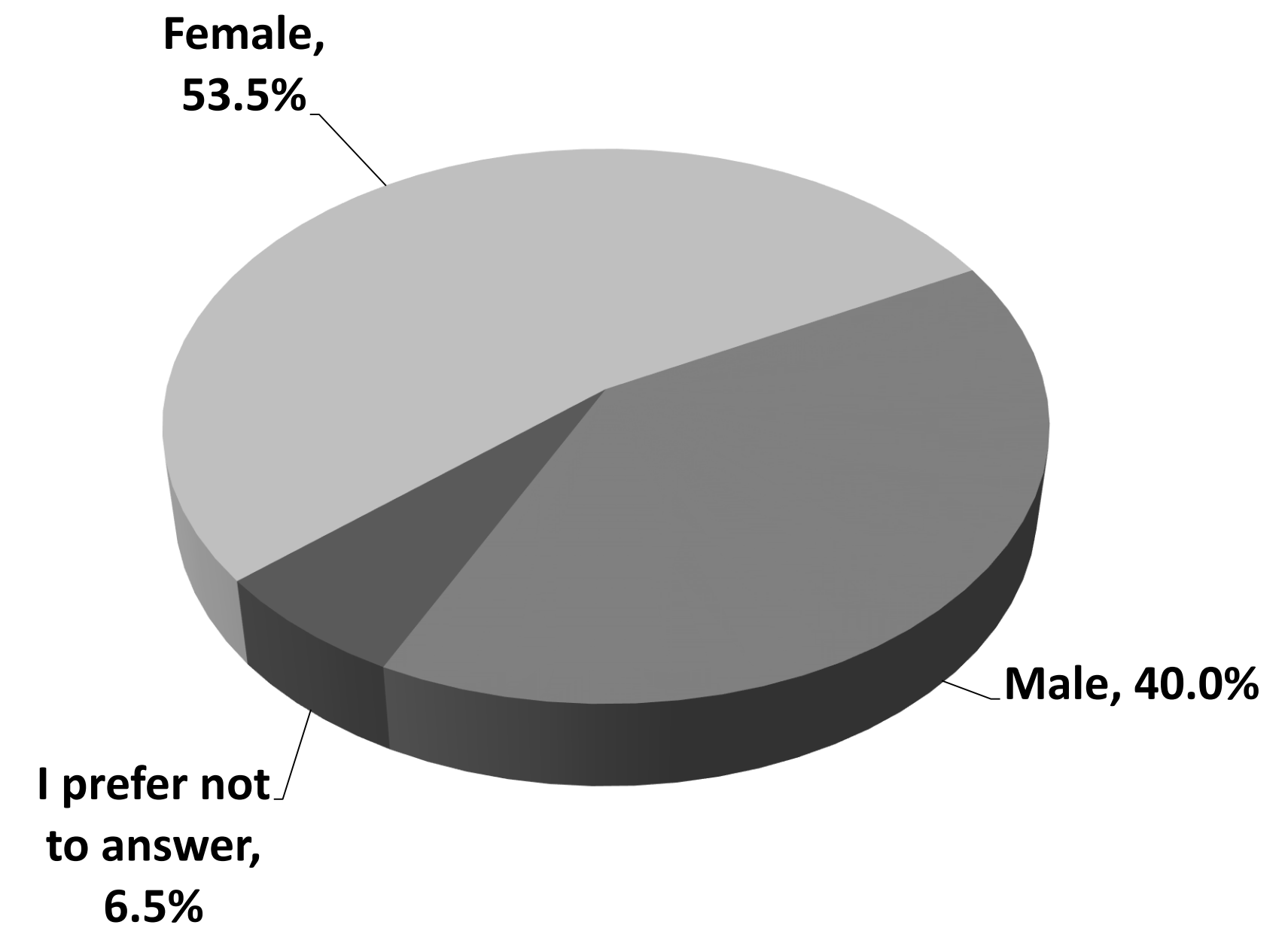
# DEMOGRAPHICS

# Gender

**Monterey County lodging guests surveyed skew slightly female (53.5%). 40.0 percent are male.**

Question: What is your gender? (Select one) Base: Respondents who stayed in paid lodging in Monterey County. 398 completed surveys.

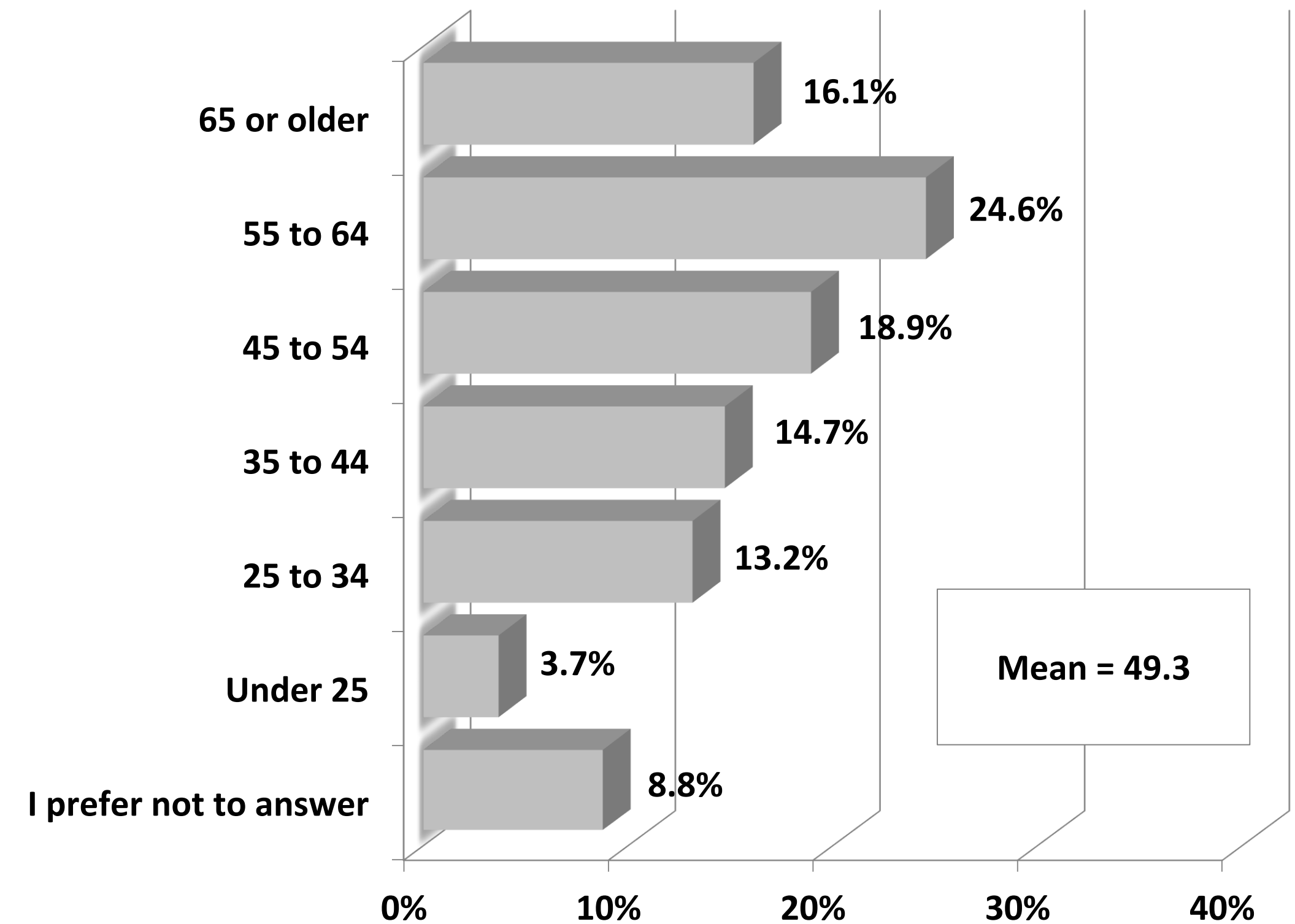
**Chart 24: Gender**



# Age

The average age of Monterey County lodging guests surveyed is **49.3 years**. 40.7 percent of this group are over the age of 55.

Chart 25: Age



Question: What is your age? (Select one) Base: Respondents who stayed in paid lodging in Monterey County. 401 completed surveys.

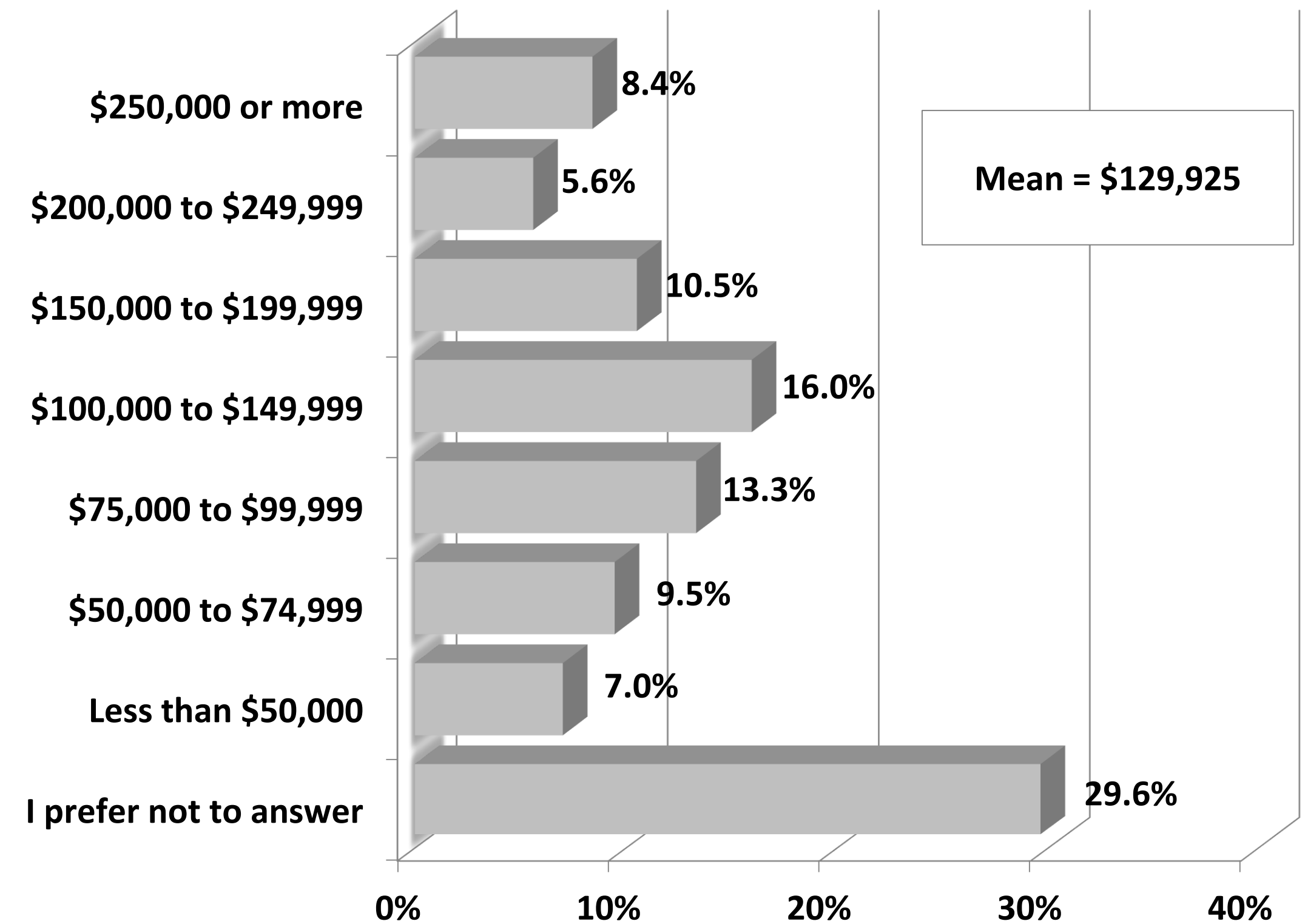
# Annual Household Income

**Monterey County's lodging guest visitors are an affluent group.**

40.5 percent have an annual household income of \$100,000 or more, with the average annual household income being \$129,925.

Question: Which best describes the combined annual income of all members of your household? (Select one) Base: Respondents who stayed in paid lodging in Monterey County. 401 completed surveys.

**Chart 26: Annual Household Income**

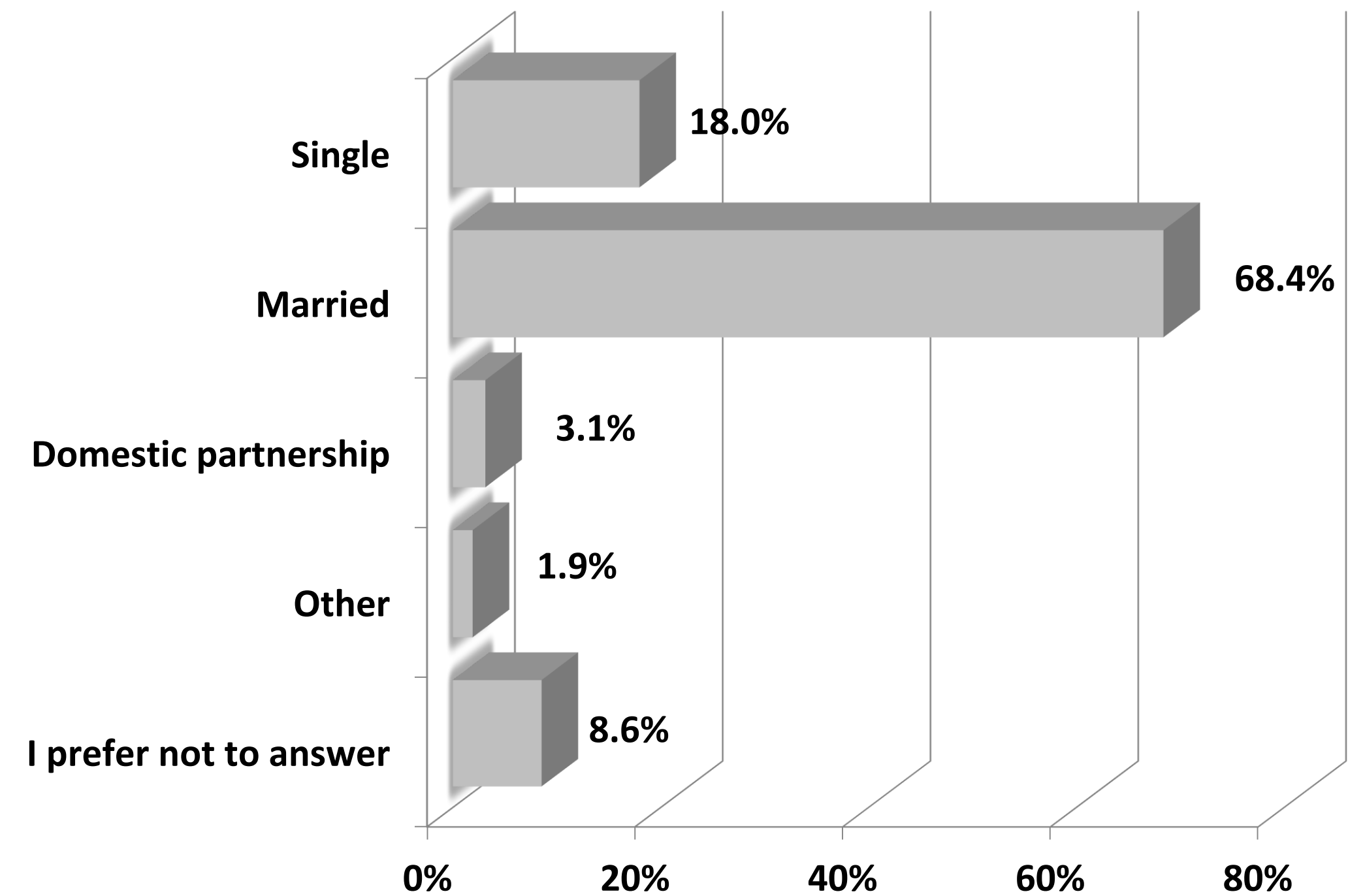


# Marital Status

Over two-thirds of lodging guest visitors surveyed are married (68.4%) or partnered (3.1%). 18.0 percent are single.

Question: Which of the following best describes your current marital status? (Select one) Base: Respondents who stayed in paid lodging in Monterey County. 403 completed surveys.

Chart 27: Marital Status

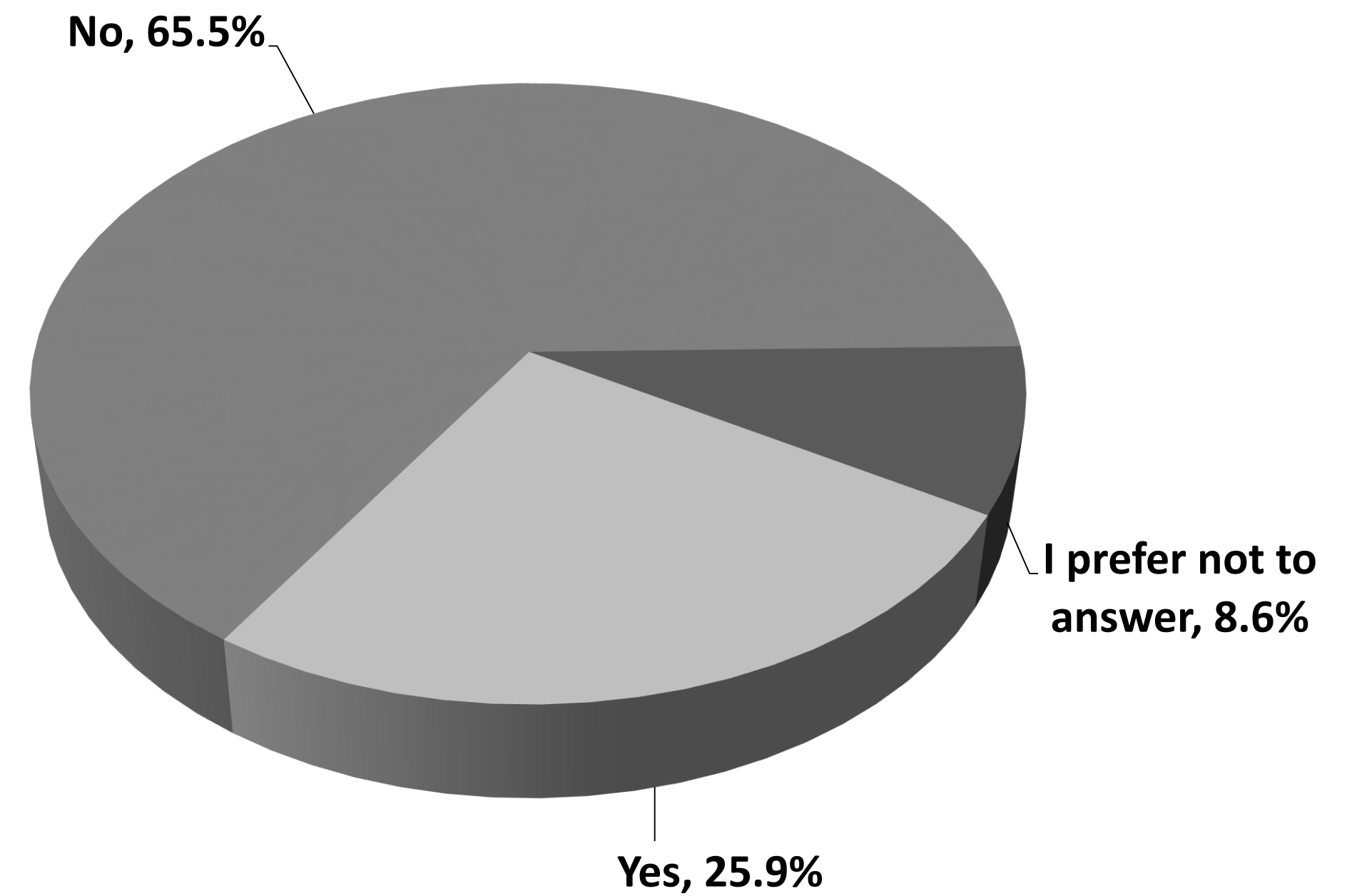


# Children in Household

One in four lodging guests surveyed have children under the age of 18 in their household (25.9%).

Question: Are there any children under 18 years of age currently living in your household? Base: Respondents who stayed in paid lodging in Monterey County. 400 completed surveys.

Chart 28: Children in Household

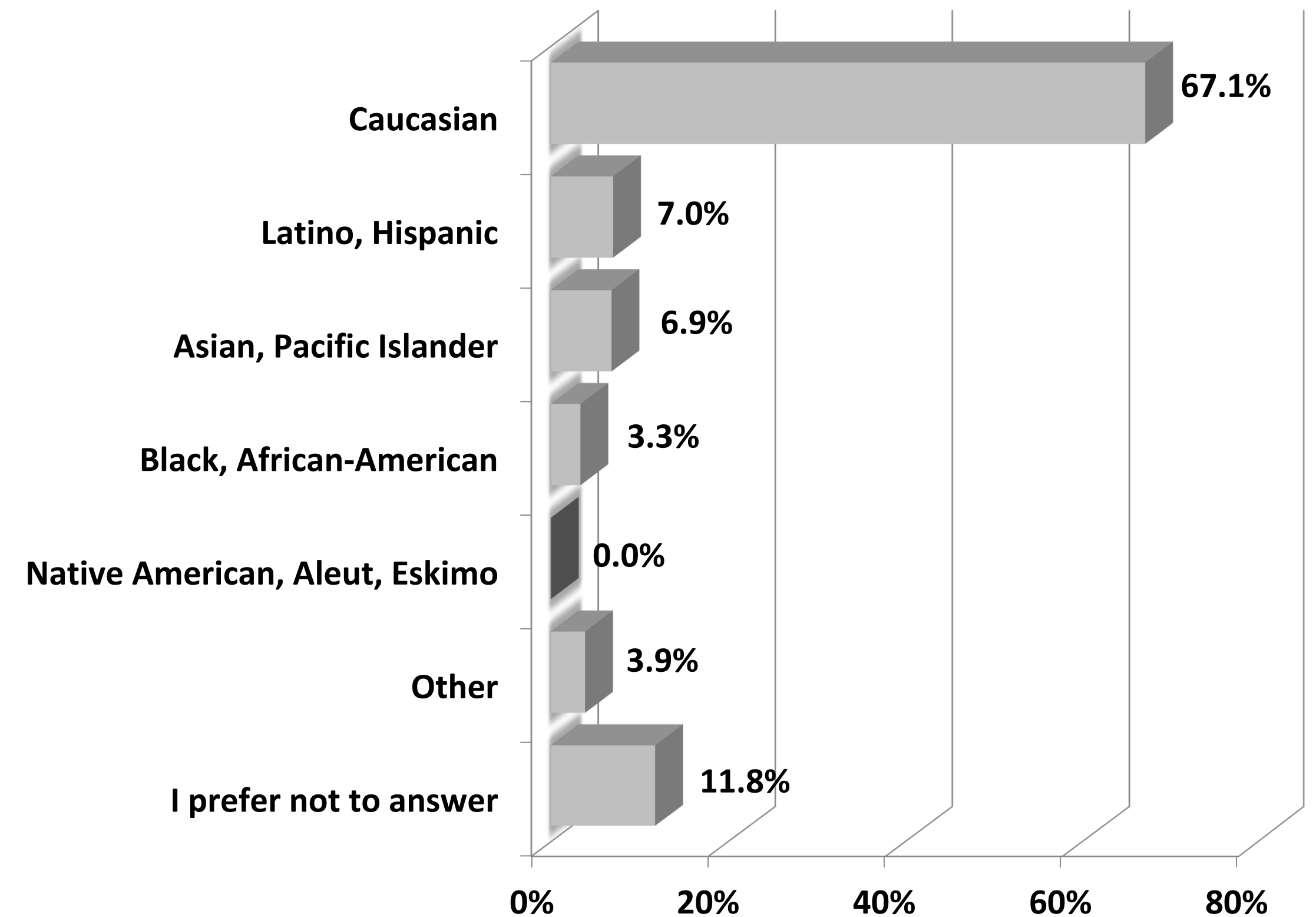


# Ethnicity

Monterey County lodging guest visitors surveyed are ethnically diverse. 21.1 percent identify as a non-Caucasian ethnicity. 7.0 percent are Latino, Hispanic while 6.9 percent identify as Asian, Pacific Islander. 3.3 percent of visitors surveyed are Black, African-American.

Question: Which best describes your ethnicity? (Select one) Base: Respondents who stayed in paid lodging in Monterey County. 400 completed surveys.

Chart 29: Ethnicity

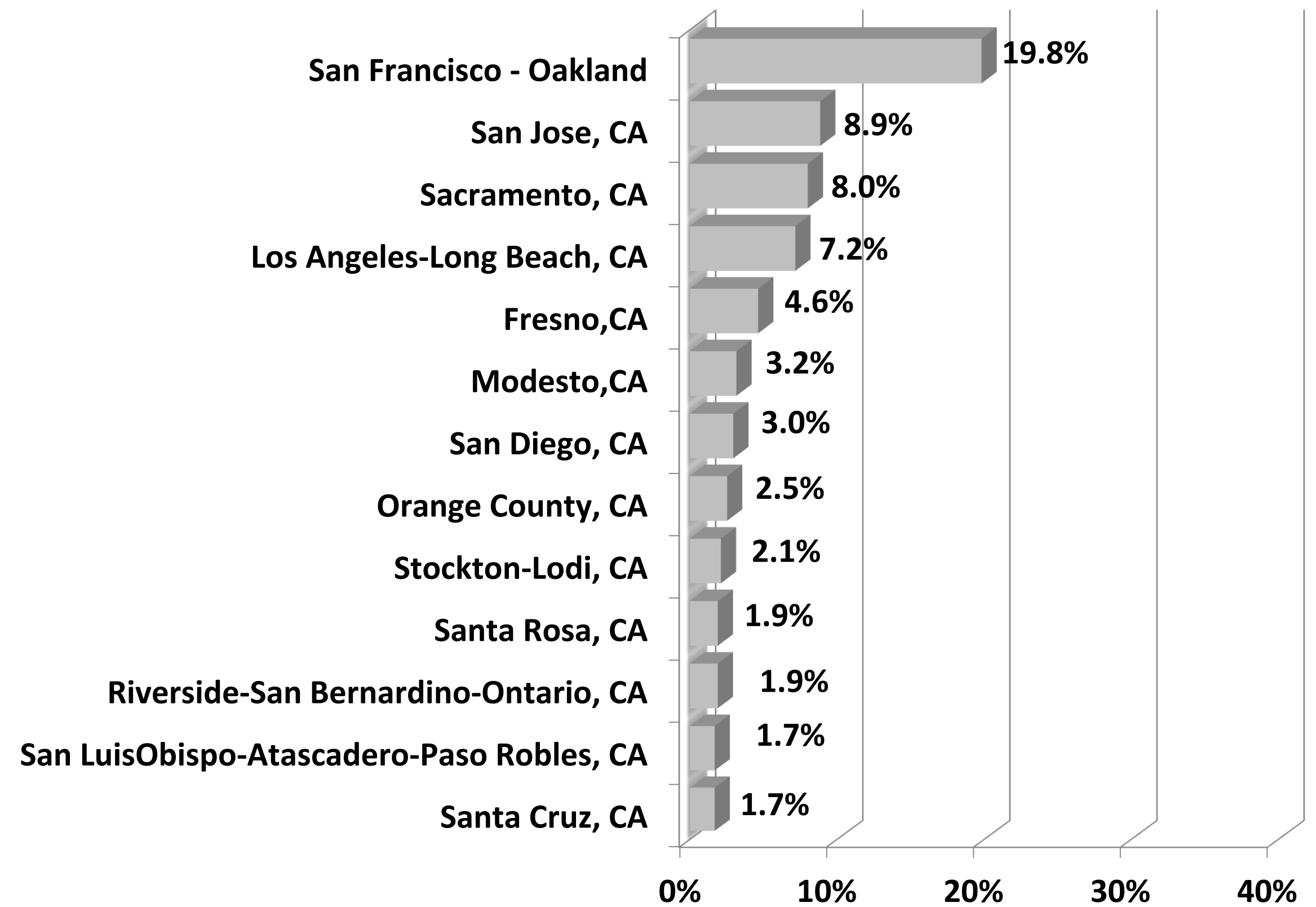


# Point of Origin: MSA

The County's top domestic feeder market is the San Francisco-Oakland, CA MSA (19.8%), followed by the San Jose, CA MSA which contributed 8.9 percent of the County's domestic visitors.

Question: What is your zip/postal code? Base: Domestic respondents who stayed in paid lodging in Monterey County. 334 completed surveys.

Chart 30: Point of Origin—MSA (% of domestic visitors)

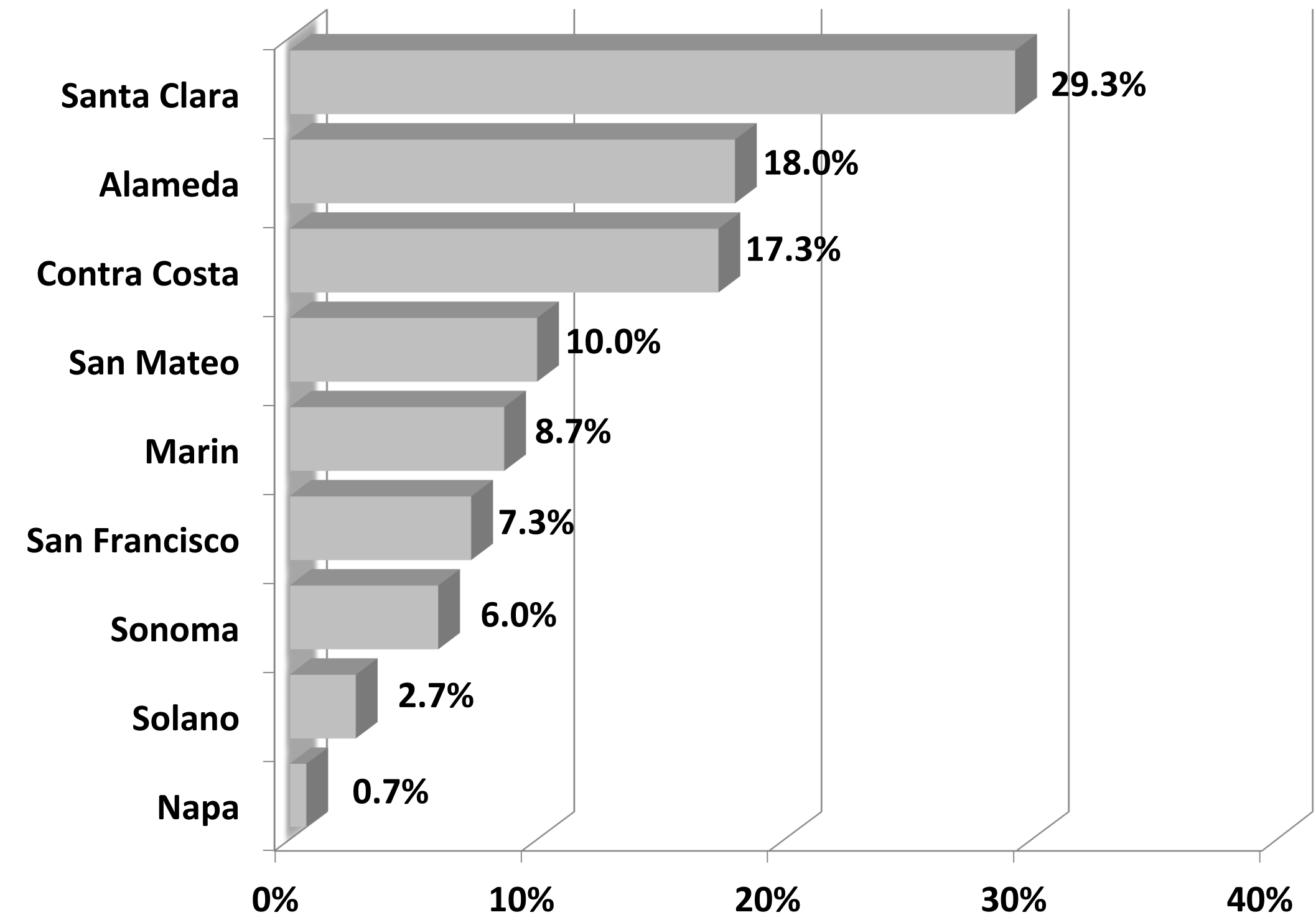




# Point of Origin: County (Bay Area Residents)

The largest proportion of lodging guest visitors from the San Francisco Bay Area reside in the nearby county of Santa Clara (29.3%). Residents of Alameda County account for 18.0 percent of this regional traffic.

Chart 31: Point of Origin—County (% of Bay Area visitors)



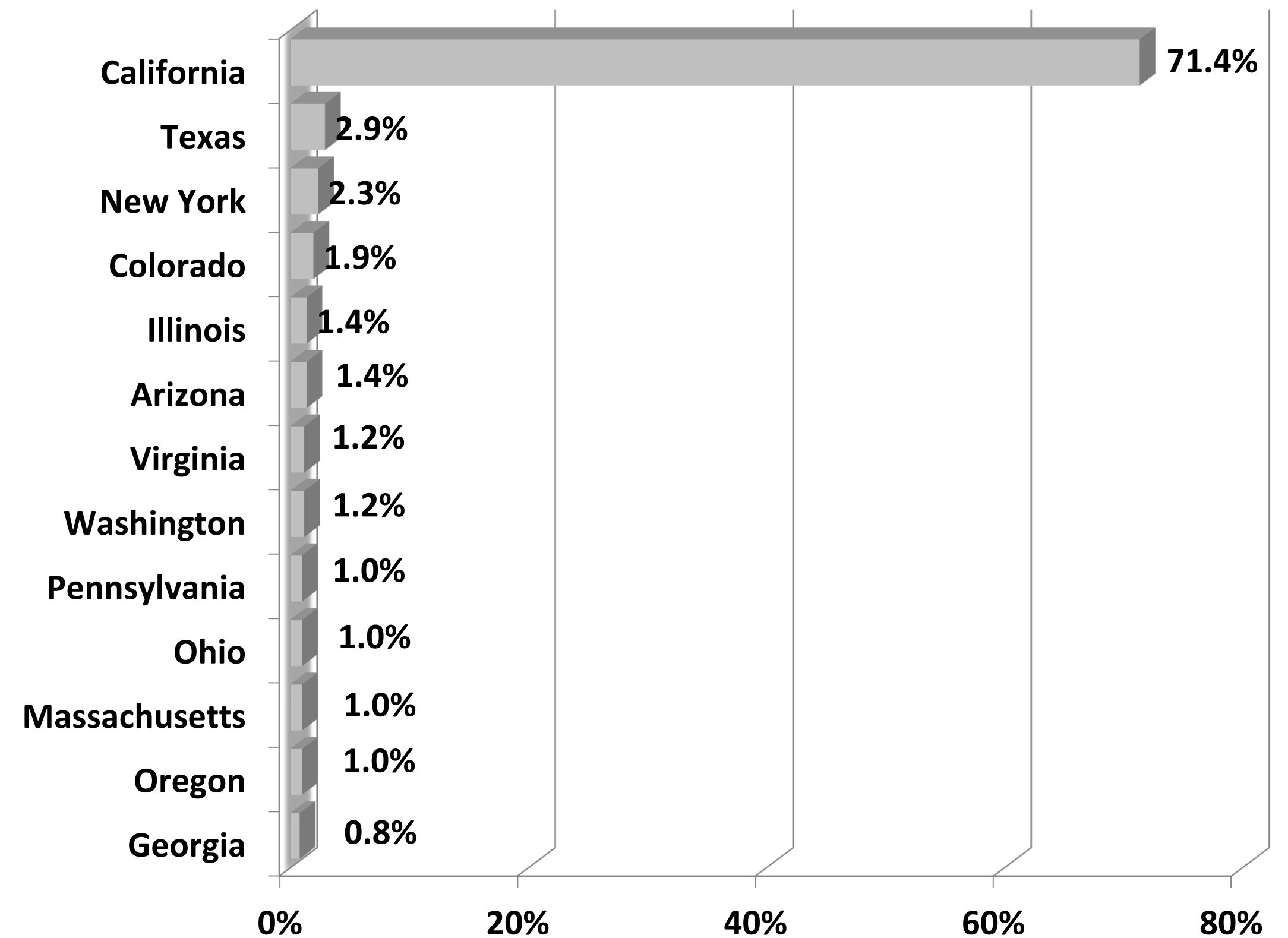
Question: What is your zip/postal code? Base: Bay Area respondents who stayed in paid lodging in Monterey County. 106 completed surveys.

# Point of Origin: State

In total, **71.4 percent** of domestic lodging guests surveyed reside **within the state of California**. Second-tier feeder markets include Texas (2.9%), New York (2.3%) and Colorado (1.9%).

Question: What is your zip/postal code? Base: Domestic respondents who stayed in paid lodging in Monterey County. 364 completed surveys.

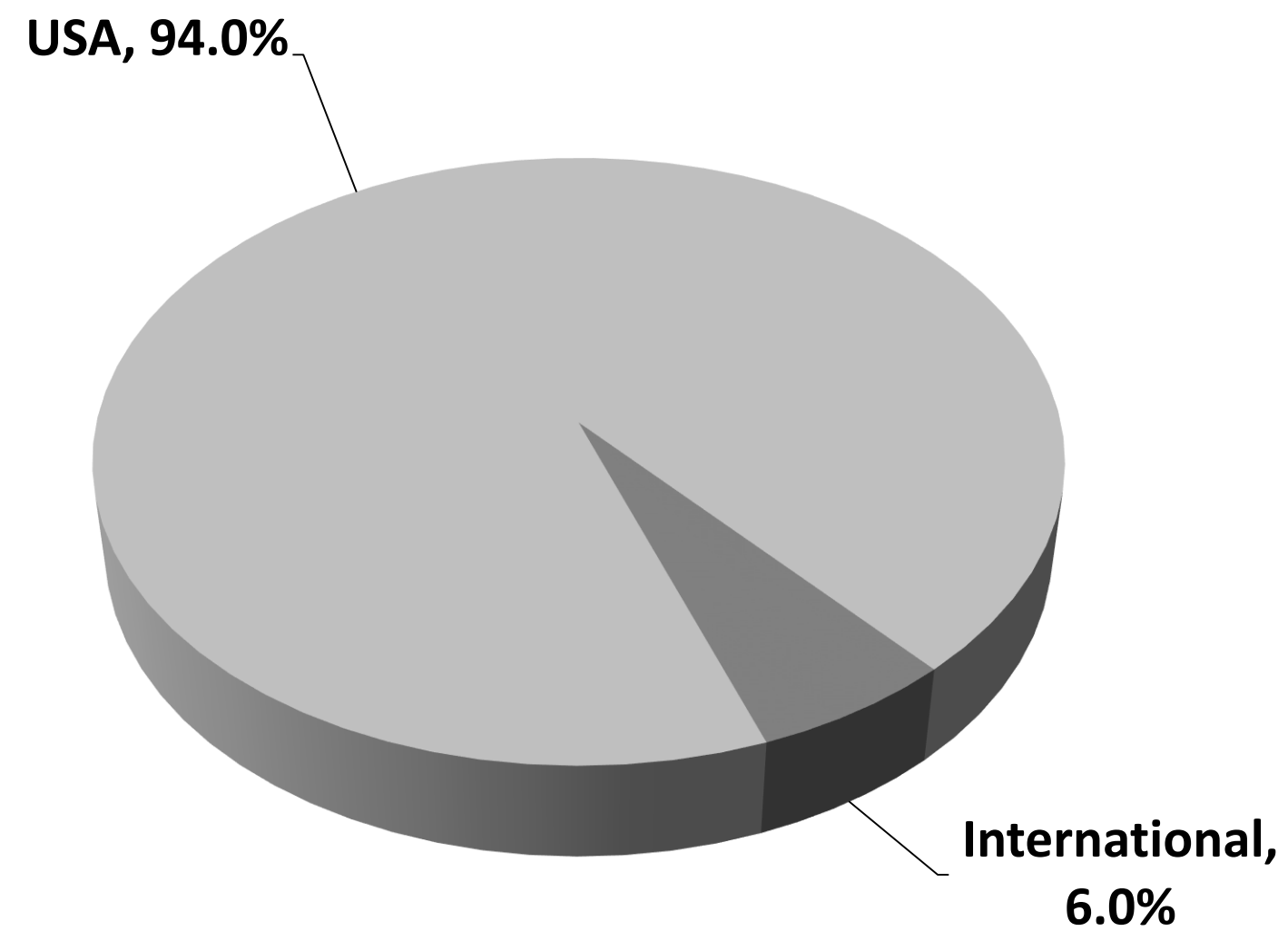
Chart 32: Point of Origin—State



# Point of Origin: Country

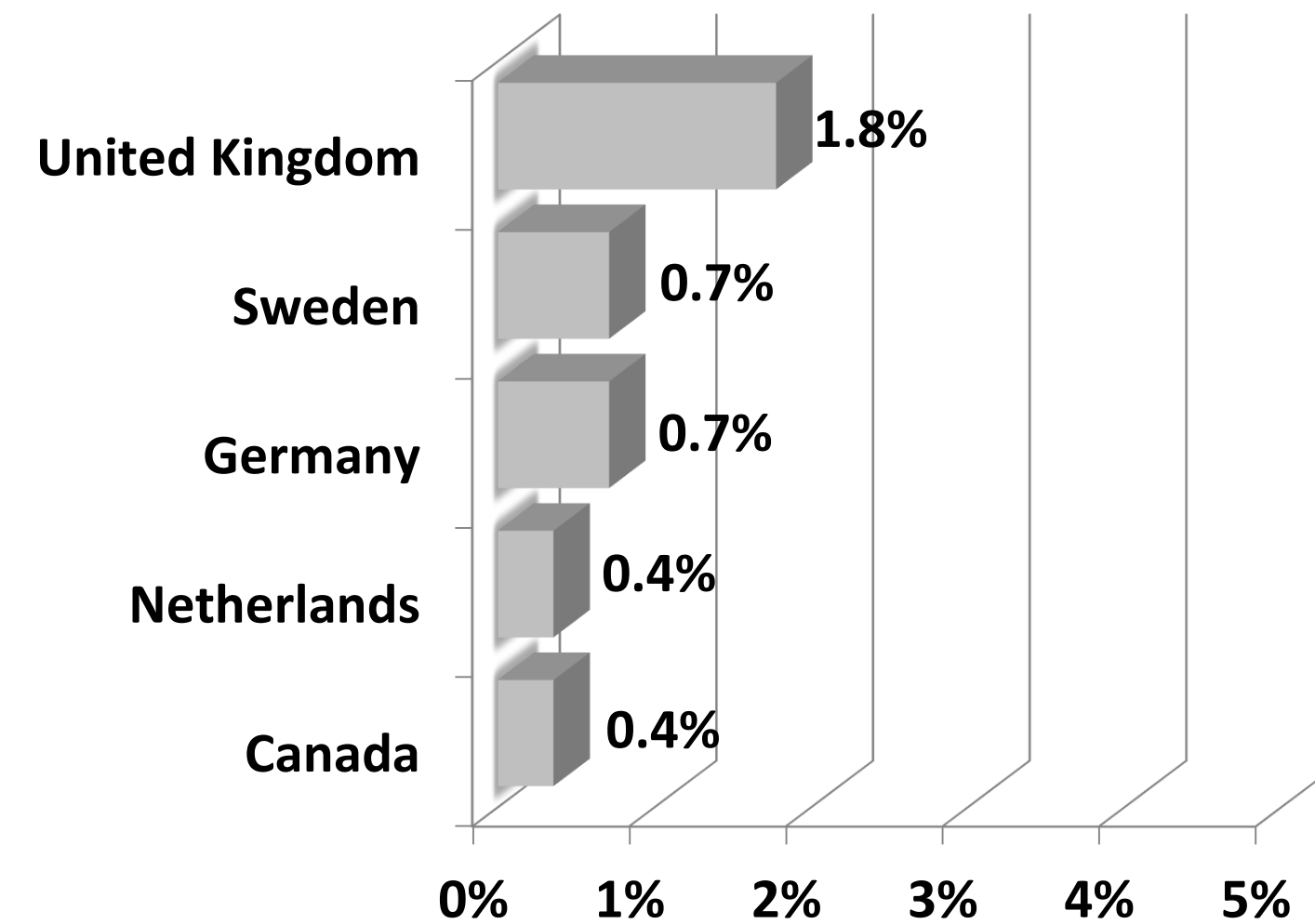
**International residents account for 6.0 percent of lodging guests surveyed.** Residents of the UK represent the largest percentage of international lodging guests to Monterey County (1.8%), followed by Sweden (0.7%) and Germany (0.7%). Note: The survey was only available in English.

**Chart 33: Point of Origin—Domestic vs. International**



Question: What is your zip/postal code?

**Chart 34: Point of Origin—Country (International Visitors)**



Base: Respondents who stayed in paid lodging in Monterey County. 396 completed surveys.

# APPENDIX I

ORIGIN MARKET  
SIDE BY SIDE COMPARISON

# Origin Market Side by Side Comparison - Lodging Guests

The table at right compares key trip details for lodging guests by major visitor point of origin groups: Bay Area, Central Valley, Southern California, and domestic visitors from outside of California. As expected, weekend getaways are more common amongst visitors in close markets (Bay Area, Central Valley) and vacations are more common in distant ones (Southern California, Outside California). Lodging guest visitors from distant markets are more likely to spend more nights in market (at least 2.5 on average). A visitor from outside California represents the highest economic impact to the County, spending \$610.05 per day.

## Detail by Origin Market

Detail by Origin Market		Total Answering	Bay Area	Central Valley	Southern California	Outside California
<b>Reason for visiting</b>						
	<b>Total Leisure</b>	<b>93.5%</b>	<b>93.8%</b>	<b>91.0%</b>	<b>89.9%</b>	<b>96.7%</b>
	<b>Vacation</b>	50.8%	32.7%	43.8%	46.1%	71.0%
	<b>Weekend getaway</b>	29.8%	49.4%	33.7%	27.0%	14.0%
<b>Trip Length</b>						
	<b>Days</b>	3.0	2.5	3.0	3.1	3.4
	<b>Nights</b>	2.3	1.9	2.2	2.5	2.6
<b>Spending Per Day</b>						
	<b>Hotel/motel/inn</b>	\$232.95	\$230.32	\$224.68	\$230.12	\$247.76
	<b>Restaurants</b>	\$147.82	\$133.97	\$142.10	\$170.93	\$155.30
	<b>Retail purchases</b>	\$88.48	\$80.66	\$92.73	\$87.69	\$93.94
	<b>Entertainment &amp; sightseeing</b>	\$38.63	\$33.40	\$41.29	\$48.43	\$37.11
	<b>Gas, parking and local transportation</b>	\$20.71	\$21.16	\$25.27	\$17.26	\$17.84
	<b>Car rental fees</b>	\$18.59	\$2.98	\$1.43	\$4.26	\$46.92
	<b>Other</b>	\$16.87	\$18.69	\$19.52	\$24.12	\$11.19
	<b>Total</b>	<b>\$564.04</b>	<b>\$521.19</b>	<b>\$547.03</b>	<b>\$582.81</b>	<b>\$610.05</b>

# APPENDIX II

## VISITOR DEMOGRAPHICS BY QUARTER

# Lodging Guest Visitor Demographics by Quarter

## Gender

	Total	Q1	Q2	Q3	Q4
Female	53.5%	85.2%	46.6%	45.6%	71.8%
Male	40.0%	14.8%	49.2%	40.5%	28.2%
<b>Base</b>	<b>398</b>	<b>38</b>	<b>167</b>	<b>137</b>	<b>55</b>

## Income

	Total	Q1	Q2	Q3	Q4
\$250,000 or more	8.4%	5.5%	10.2%	7.3%	7.7%
\$200,000 to \$249,999	5.6%	3.6%	4.9%	6.7%	6.4%
\$150,000 to \$199,999	10.5%	20.0%	9.8%	8.8%	10.3%
\$100,000 to \$149,999	16.0%	16.4%	15.2%	16.6%	16.7%
\$75,000 to \$99,999	13.3%	21.8%	10.7%	11.9%	19.2%
\$50,000 to \$74,999	9.5%	10.9%	11.9%	6.2%	9.0%
Less than \$50,000	7.0%	5.5%	7.0%	7.8%	6.4%
I prefer not to answer	29.6%	16.4%	30.3%	34.7%	24.4%
Mean	\$129,925	\$125,000	\$131,103	\$131,250	\$127,542
<b>Base</b>	<b>401</b>	<b>39</b>	<b>172</b>	<b>136</b>	<b>55</b>

## Age

	Total	Q1	Q2	Q3	Q4
65 or older	16.1%	37.0%	13.2%	12.8%	19.2%
55 to 64	24.6%	27.8%	23.6%	18.4%	41.0%
45 to 54	18.9%	14.8%	16.5%	21.9%	21.8%
35 to 44	14.7%	14.8%	17.8%	14.3%	6.4%
25 to 34	13.2%	5.6%	16.1%	13.8%	7.7%
Under 25	3.7%	0.0%	5.8%	2.6%	2.6%
I prefer not to answer	8.8%	0.0%	7.0%	16.3%	1.3%
Mean	49.3	55.4	47.1	48.2	53.7
<b>Base</b>	<b>401</b>	<b>38</b>	<b>170</b>	<b>138</b>	<b>55</b>

# Lodging Guest Visitor Demographics by Quarter (continued)

## Marital Status

	Total	Q1	Q2	Q3	Q4
Single	18.0%	25.5%	20.5%	11.7%	20.5%
Married	68.4%	65.5%	68.4%	67.3%	73.1%
Domestic partnership	3.1%	5.5%	2.0%	4.1%	2.6%
Other	1.9%	3.6%	2.0%	1.5%	1.3%
I prefer not to answer	8.6%	0.0%	7.0%	15.3%	2.6%
<b>Base</b>	<b>403</b>	<b>39</b>	<b>172</b>	<b>138</b>	<b>55</b>

## Ethnicity

	Total	Q1	Q2	Q3	Q4
Caucasian	67.1%	80.0%	63.5%	66.3%	71.4%
Non-caucasian	21.1%	12.7%	27.8%	15.8%	19.5%
I prefer not to answer	11.8%	7.3%	8.7%	17.9%	9.1%
<b>Base</b>	<b>400</b>	<b>39</b>	<b>170</b>	<b>138</b>	<b>54</b>

## Children In Household

	Total	Q1	Q2	Q3	Q4
Yes	25.9%	16.4%	32.2%	25.8%	13.0%
No	65.5%	81.8%	62.0%	57.7%	84.4%
I prefer not to answer	8.6%	1.8%	5.8%	16.5%	2.6%
<b>Base</b>	<b>400</b>	<b>39</b>	<b>170</b>	<b>137</b>	<b>54</b>



# MONTEREY COUNTY CVB Ad & Communications Research

FY15/16 Midyear Research  
January 2016

# Background & Objectives

- The Monterey County Convention & Visitors Bureau (MCCVB) launched its “Grab Life by the Moments” brand and advertising effort in October 2013 (FY13/14 Q2). The core target for the campaign has been leisure travelers in drive and direct-flight (regional) markets. The creative is designed to compel travelers to make the most of a getaway/vacation by taking advantage of the unique experiences found in Monterey County.
- To measure the success of the effort, MCCVB partnered with Strategic Marketing & Research Insights (SMARInsights) to conduct a baseline measure in April 2013, with subsequent measures every six months (see table).
- MCCVB launched new fall ads in FY15/16 Q1-Q2. The following report details the findings related to this fall advertising with comparisons to previous waves.
- The specific objectives of this research are to:
  - Review the results relative to established benchmarks;
  - Assess audience reaction to the creative elements;
  - Evaluate the impact of the advertising campaign on generating Monterey travel;
  - Review visitor/trip specifics and related marketing implications;
  - Estimate ad-influenced travel and associated travel revenue;
  - Quantify additional impact from the PR efforts; and
  - Provide conclusions and recommendations to guide MCCVB’s marketing efforts.

Date	Research Wave
April 2013	Pre-Brand Launch
Dec. 2013	FY13/14 Midyear
June 2014	FY13/14 End of Year
Dec. 2014	FY14/15 Midyear
June 2015	FY14/15 End of Year
Dec. 2015	FY15/16 Midyear

# Methodology

- Advertising/communication impact is assessed by measuring the differences in perceptions and behaviors between those who have been exposed to the various marketing channels and those who have not.
- The survey is administered online so that respondents can see the actual marketing materials, resulting in a representative aided awareness assessment.
- This current research survey fielded from December 22-30, 2015.
- A total of 1,296 interviews were completed in the target markets of interest.
- The nearby and direct flight markets are referred to as “regional markets.” The rest of the nation is referred to as “remaining national.”
- Upon completion of data collection, a dataset was compiled, cleaned, and coded for analysis.
- The following is a summary of the study’s key findings.

Market	Completed Surveys
San Francisco	253
Sacramento	254
Los Angeles	130
San Diego	127
Remaining CA	128
Fly markets – Phoenix/Vegas	127
Remaining National	277
Total	1,296

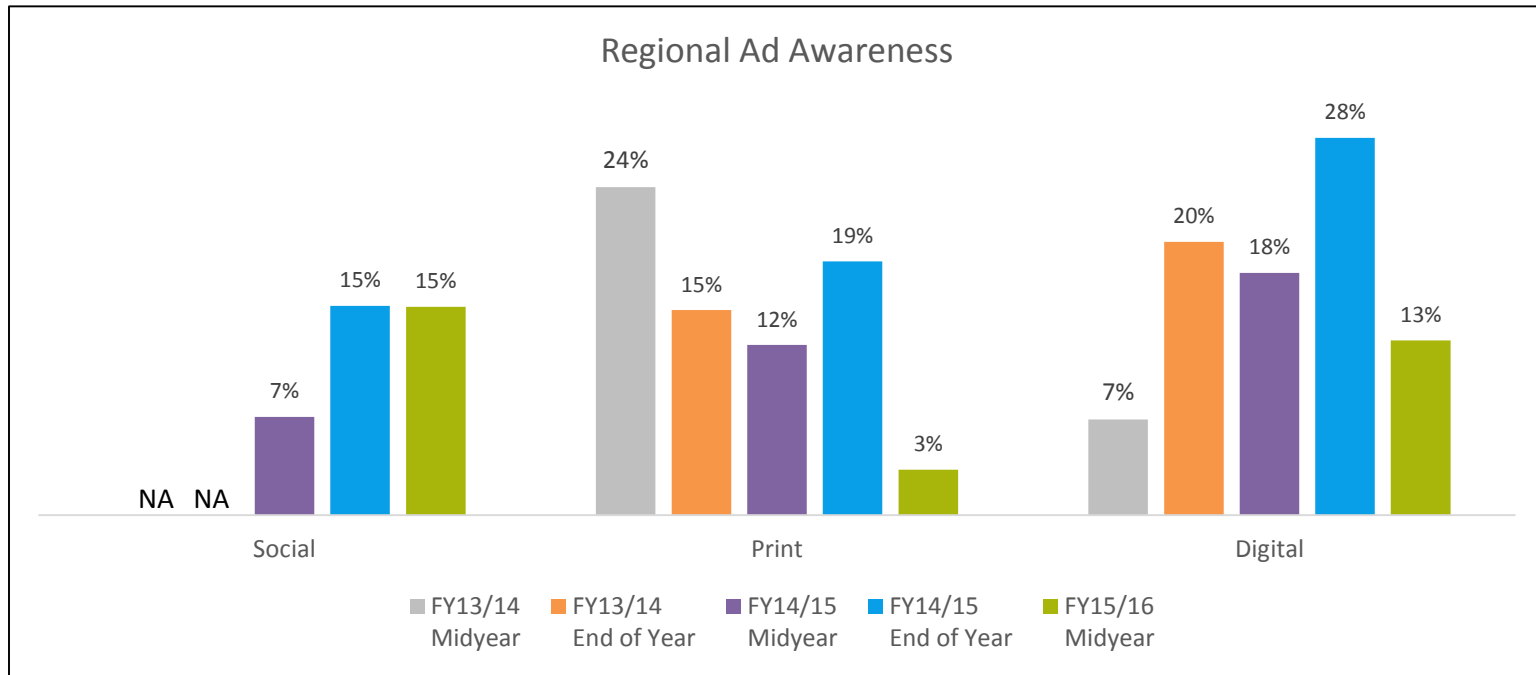
**Regional Markets**

# Insights

- The Monterey brand measure remains above the goal level, and has remained stable despite regional campaign spending declines.
- At midyear FY15/16, 21% of the regional audience is aware of MCCVB fall advertising. Awareness is down compared to the FY14/15 end-of-year measure, but is on par with the prior midyear measure. Awareness tends to fluctuate with ad spending.
- MCCVB spent less and got lower ad awareness, but the media buy is the most efficient of the past five waves. MCCVB spent \$0.04 to reach a regional target household. SMARInsights' benchmark for a similar campaign is \$0.35.
- The FY15/16 Q1-Q2 fall campaign receives relatively low evaluative ratings. Monterey has a great product, and the ads should feature beautiful, dramatic, large scale images of this product. Previous campaigns, which have showcased full-page images and less text, have received stronger ratings.
- While the fall ads received less-than-stellar ratings, they ultimately did influence Monterey travel. The existing equity of previous campaigns is likely still helping to influence trips. About 73,000 Monterey trips can be attributed to the FY15/16 Q1-Q2 advertising. This is similar to the number of trips influenced in the previous midyear assessments.
- Advertising impact increases when the audience is also exposed to Monterey PR efforts. MCCVB should continue to make generating ad/PR overlap a priority. Ad/PR overlap actually declined slightly in this wave.
- Specific Monterey trip motivators and general target audience travel motivators suggest that MCCVB should feature Monterey's beautiful and dramatic scenery/natural attractions, the aquarium, and unique local dining in the advertising.
- MCCVB's current ads, which feature mainly adults/couples, are on target given that more than half of Monterey travel parties are adult couples.
- Varied trip planning periods suggest that there are opportunities to reach the audience well in advance of the intended travel period – and to offer “last-minute” retail-oriented deals.

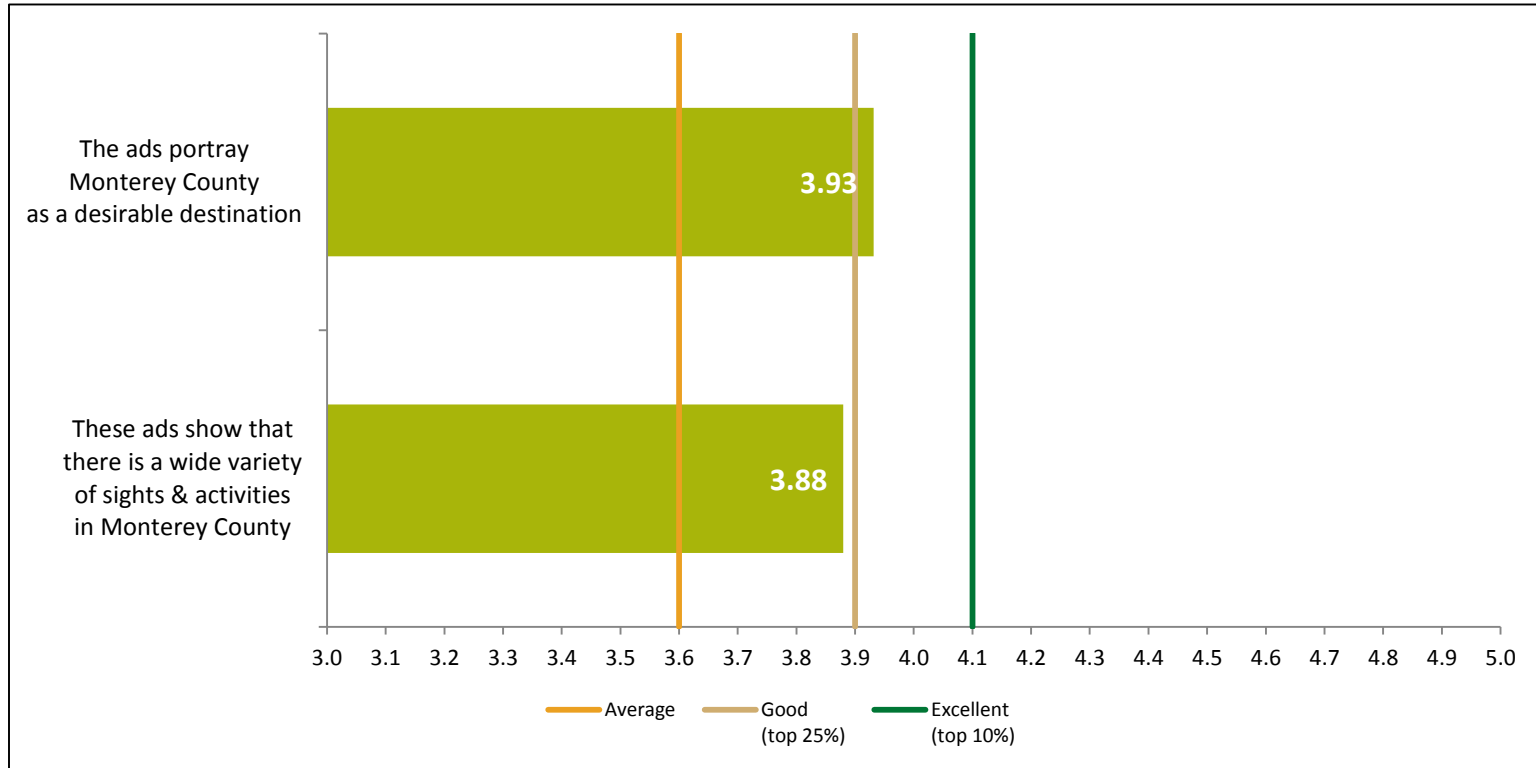
# FY15/16 Midyear Regional Review

# Social advertising awareness remained stable, while print and digital ad awareness declined notably.

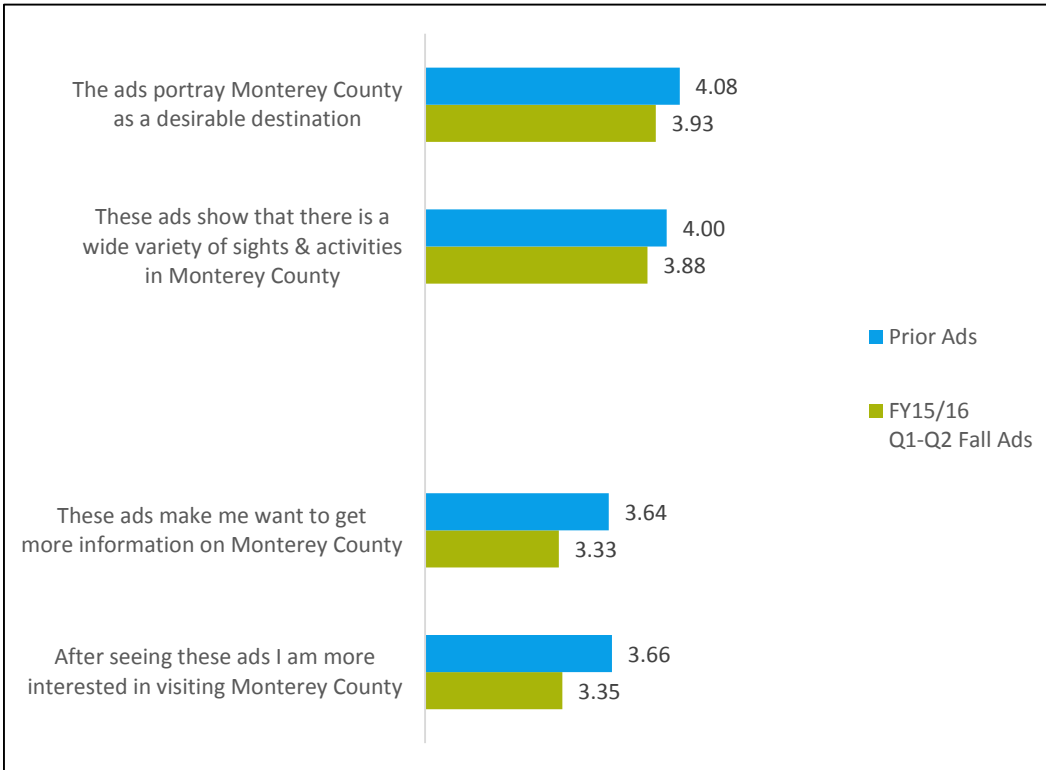


- While awareness declines are not unexpected due to new ads and lower spending, the sharp decline in print ad awareness is also likely related to showing just a few ads in news publications. Previous print campaigns have included as many as nine print ads and ran in news publications and magazines.

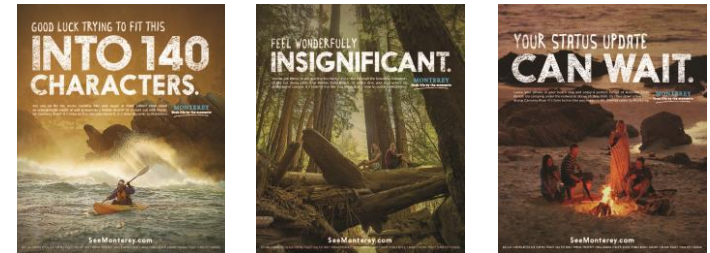
The fall creative is “good” (top 25%) at portraying Monterey as a desirable destination with a wide variety of sights and activities.



# Prior Monterey ads, which have featured full-page dramatic images of the tourism product, have received stronger evaluative ratings than the current fall ads.



## Prior Ads Tested



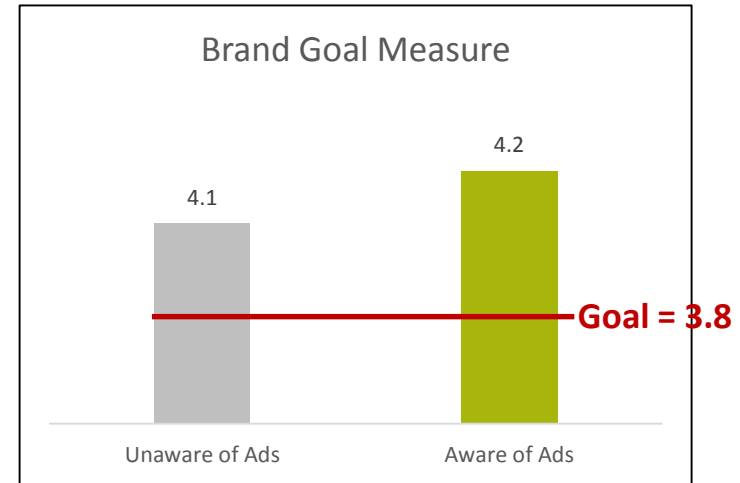
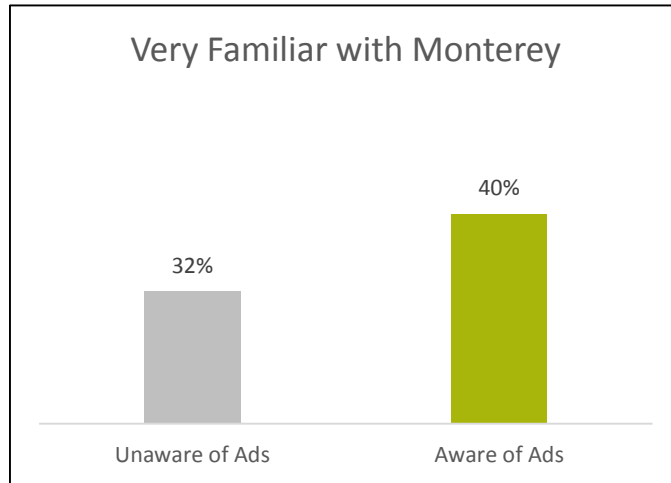
## FY15/16 Q1-Q2 Fall Ads Tested



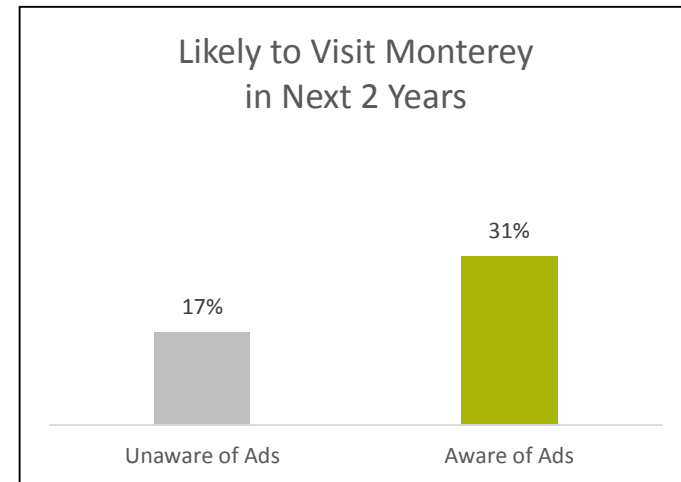
- Small differences in the way that the product is portrayed in the ads can make a big difference in the way that the audience reacts to them. In this case, the small difference is full page vs. partial page photos (and photo selection).
- These ratings are of course simply the evaluative reaction. The actual ad impact on interest and travel is reviewed next.



# The fall advertising familiarizes, builds perceptions, and generates interest in visiting.



- Those aware of the ads are more familiar with Monterey, think more positively of the destination, and are more likely to visit than are those who are not aware of the ads.



About 73,000 regional Monterey trips are attributable to the FY15/16 Q1-Q2 fall advertising.

	<b>FY13/14 Midyear</b>	<b>FY13/14 End of Year</b>	<b>FY14/15 Midyear</b>	<b>FY14/15 End of Year</b>	<b>FY15/16 Midyear</b>
Aware HHs	3,465,927	3,557,895	2,774,049	4,520,180	3,041,041
Incremental Overnight Travel %	1.9%	5.4%	3.4%	2.7%	2.4%
Incremental Traveling HHs	67,315	194,655	93,263	120,195	73,257

Nearly \$76 million in regional visitor spending can be attributed to the FY15/16 Q1-Q2 fall advertising.

	<b>FY13/14 Midyear</b>	<b>FY13/14 End of Year</b>	<b>FY14/15 Midyear</b>	<b>FY14/15 End of Year</b>	<b>FY15/16 Midyear</b>
Incremental Traveling HHs	67,315	187,160	93,263	120,195	73,257
Average Trip Spending	\$1,119	\$1,111	\$1,038	\$1,059	\$1,036
Ad-Influenced Visitor Spending	\$75,325,738	\$216,258,111	\$96,786,586	\$127,290,675	\$75,868,365

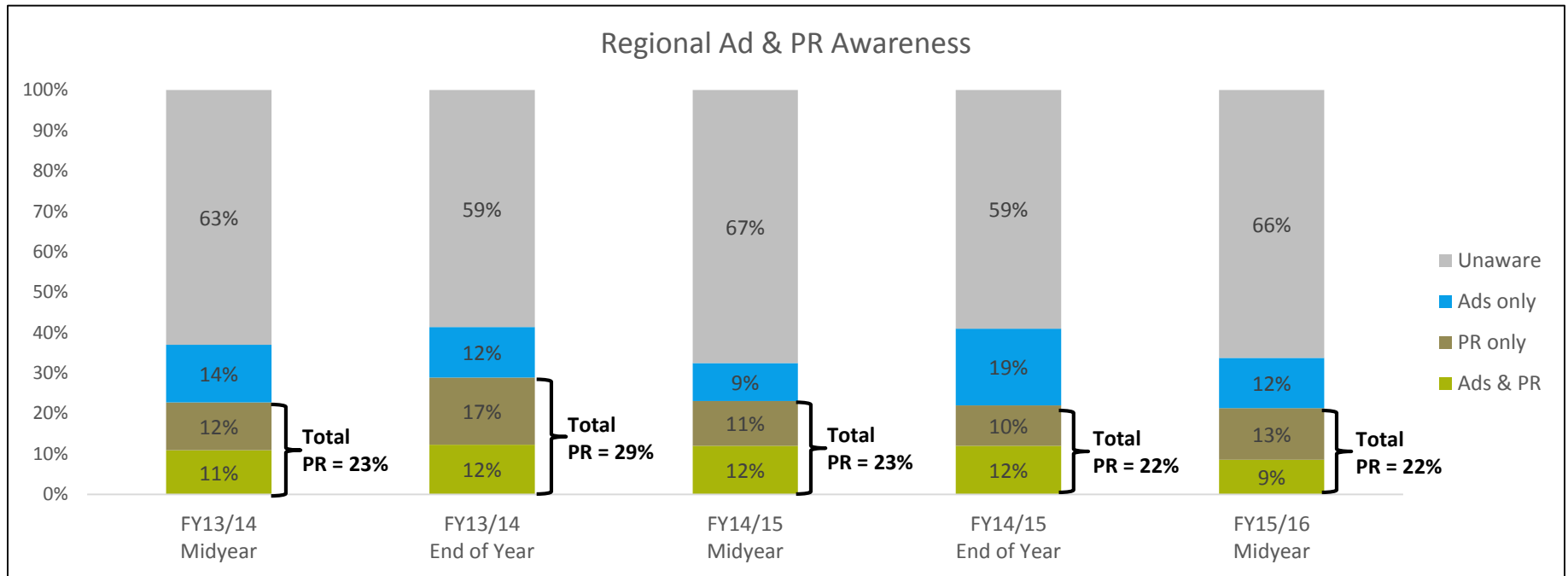
- This is similar to the level of ad-influenced visitor spending in the previous midyear assessments.

# The FY15/16 Q1-Q2 fall advertising influenced about 100,000 Monterey room nights.

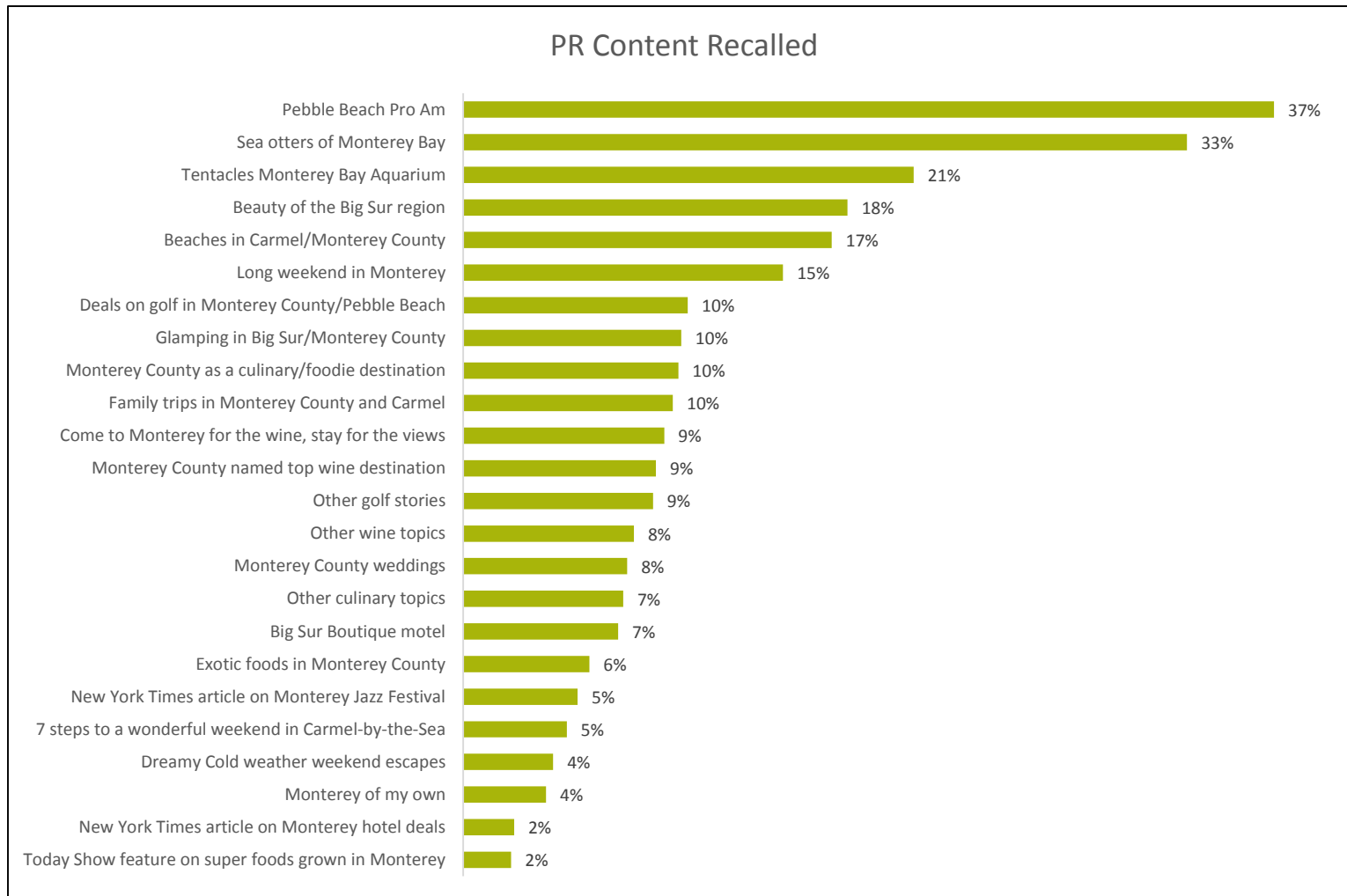
	<b>FY15/16 Midyear</b>
Incremental Overnight Traveling HHs	73,257
% staying in paid accommodations	68%
Ad-influenced trips staying in hotel, motel, inn, lodge, B&B or resort	50,155
Avg. # nights on trip	2.0
Ad-influenced room nights	100,310

# PR awareness has remained fairly steady among the regional audience.

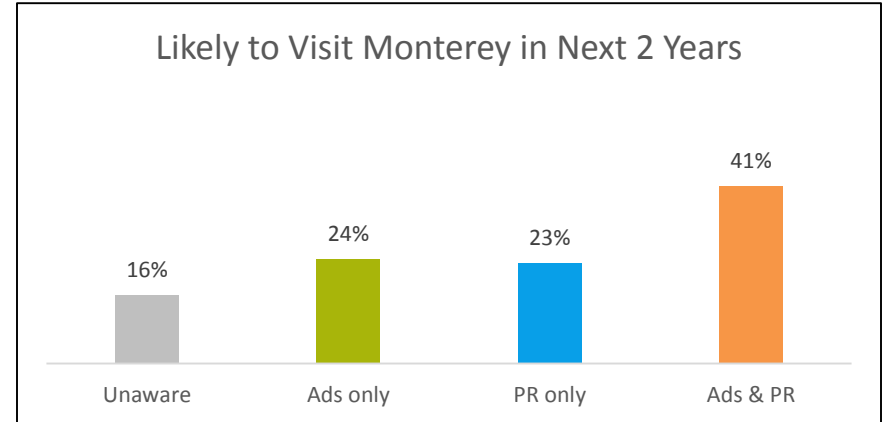
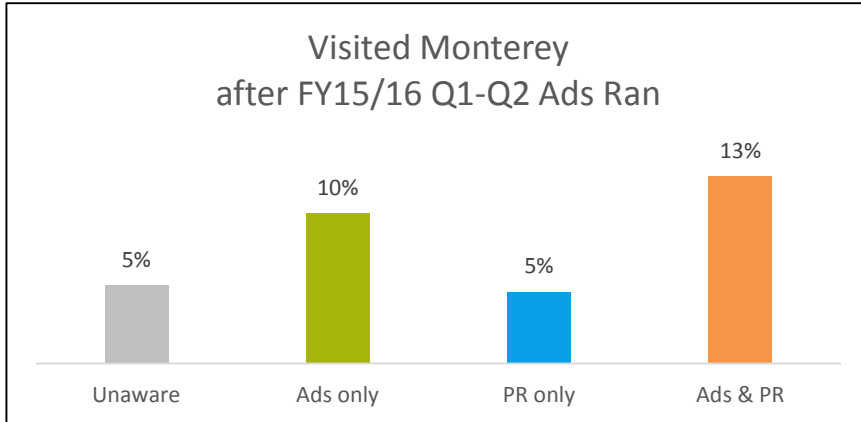
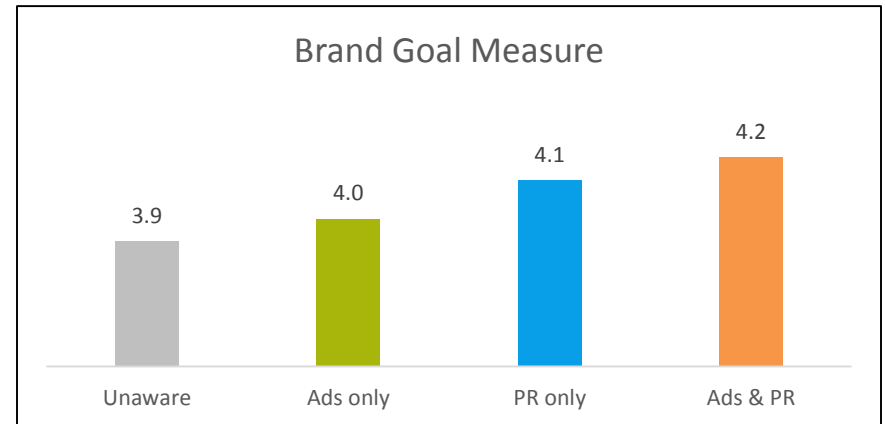
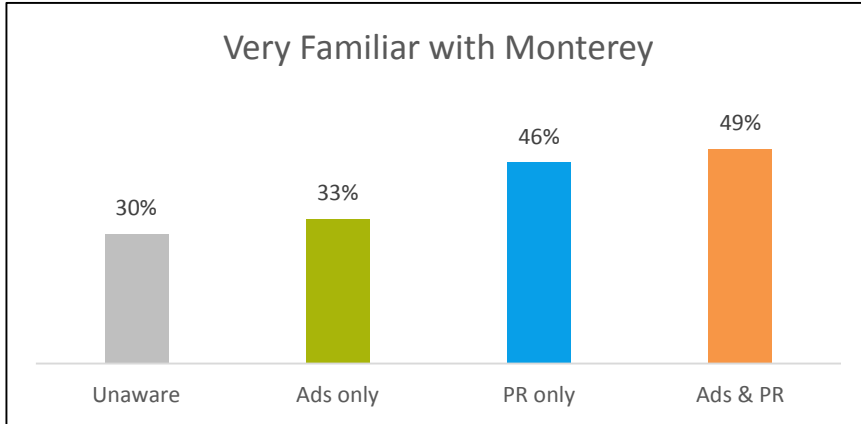
- Ad/PR overlap declined from 12% to 9%.
- Generating ad/PR overlap is important, as we generally see greater impact among those who have seen both. The impact of this overlap is explored later in this report.



The Monterey PR efforts most likely to be recalled include Pebble Beach, sea otters, the aquarium, Big Sur, beaches, and long weekends.



# The combination of traditional advertising and PR generates the greatest impacts.



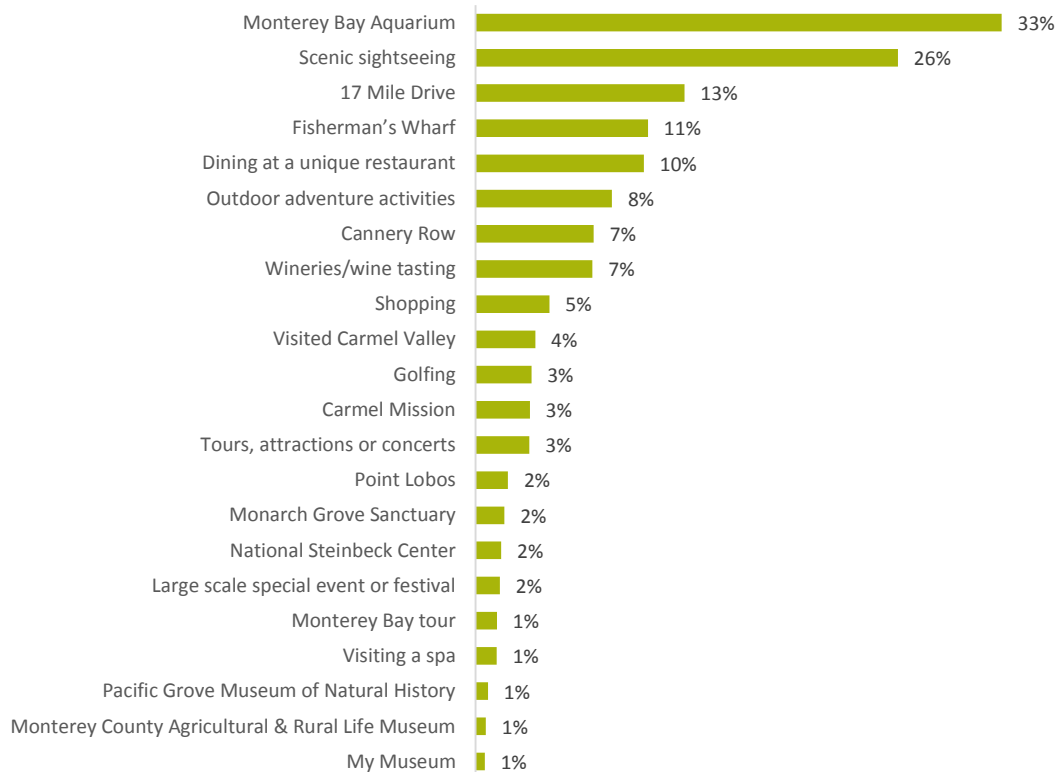
- MCCVB should continue to strive to generate ad/PR overlap.

# Regional Trip Specifics & Marketing Implications, FY15/16

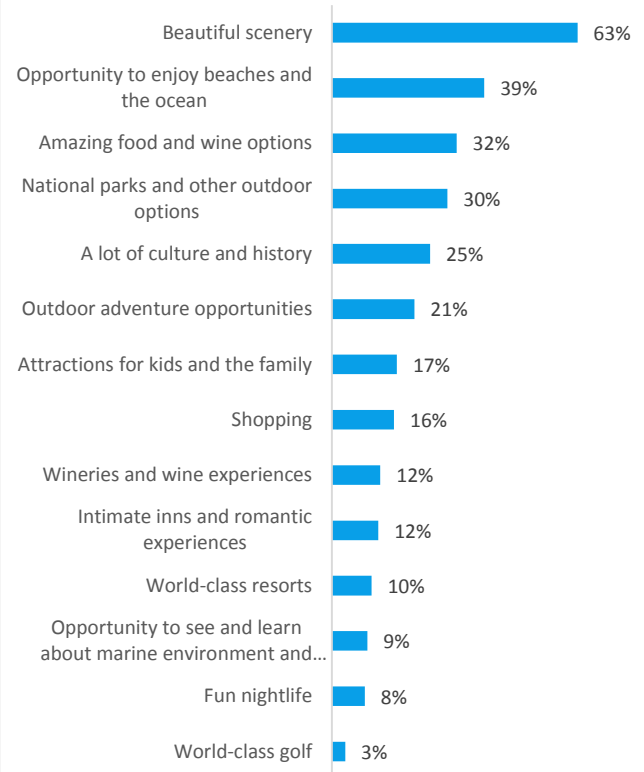


The top motivators of Monterey travel are the aquarium and general sightseeing. Other notable motivators include 17 Mile Drive, Fisherman's Wharf, and local dining.

### Major Influencers of Monterey Travel



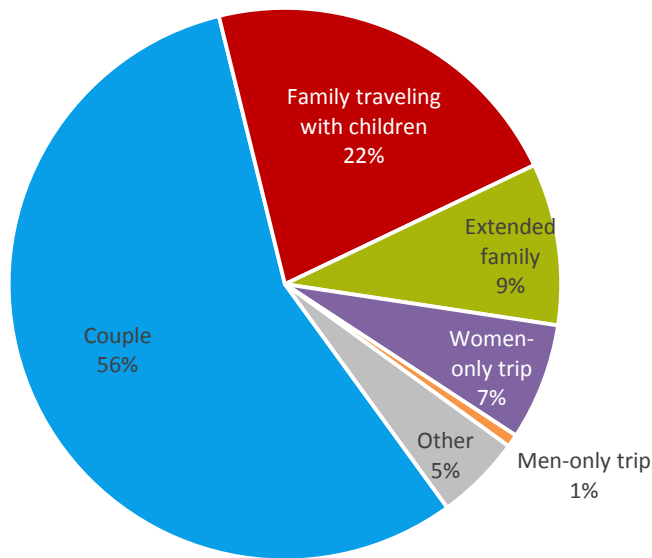
### General Travel Motivators



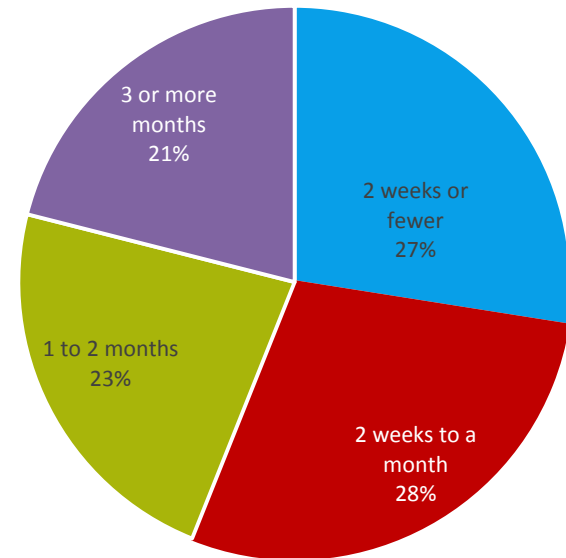
- The specific Monterey trip motivators and general travel motivators suggest that MCCVB should highlight Monterey's beautiful and dramatic scenery/natural attractions and unique local dining.

The majority of Monterey travel parties are couples traveling without children. Trip planning periods vary widely.

Travel Party



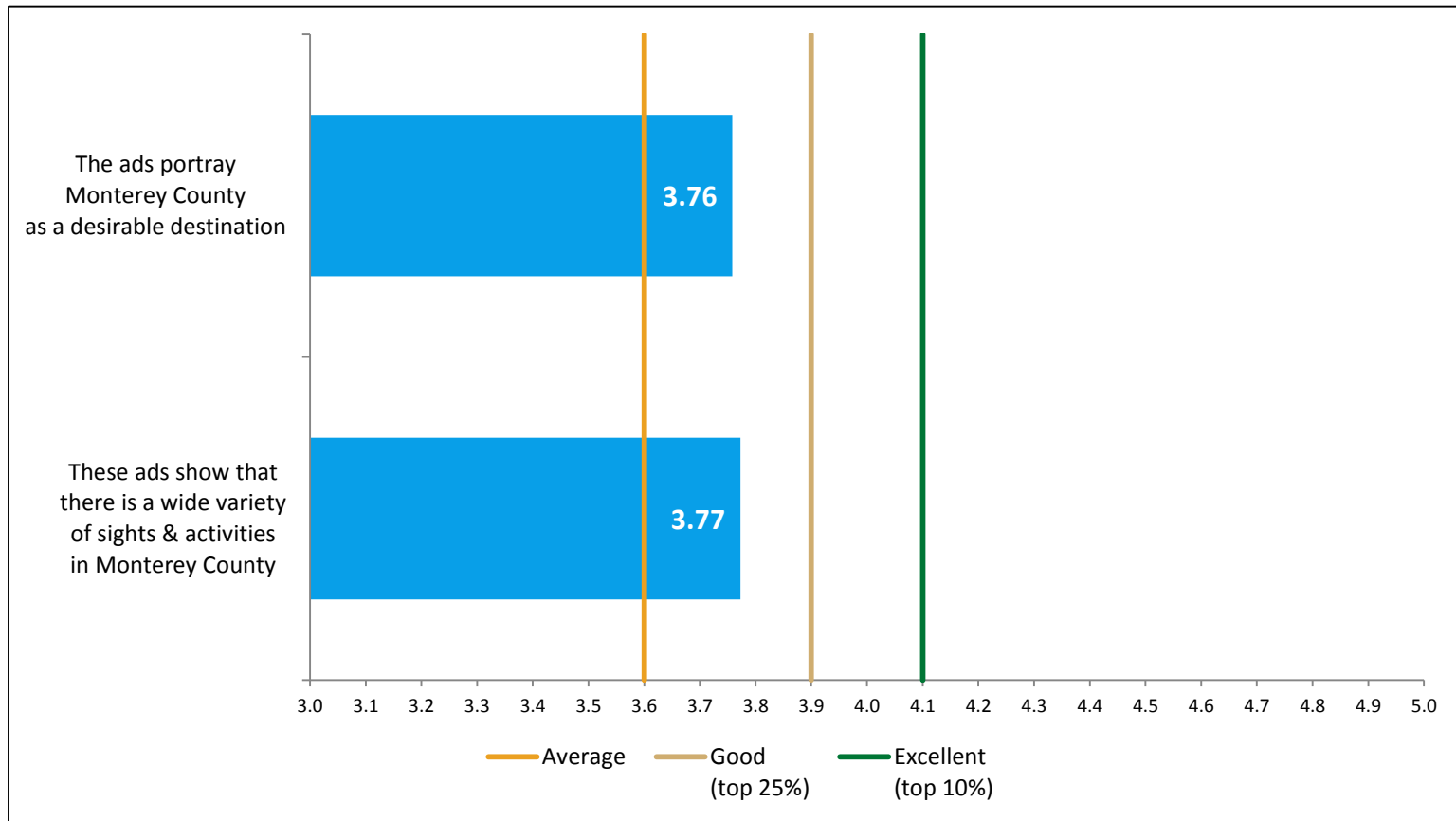
Monterey Trip Planning Period



- MCCVB's current ads, which feature mainly adults/couples, are on target.
- The varied trip planning periods suggest that there are opportunities to reach the audience well in advance of the intended travel period and to offer "last minute" retail-oriented deals.

# FY15/16 Midyear National Results Summary

The remaining national audience gives the fall creative above average ratings for communicating the intended messages.



# The fall advertising has a positive influence on familiarity, intent to visit, and actual travel among the remaining national audience.

