

# 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

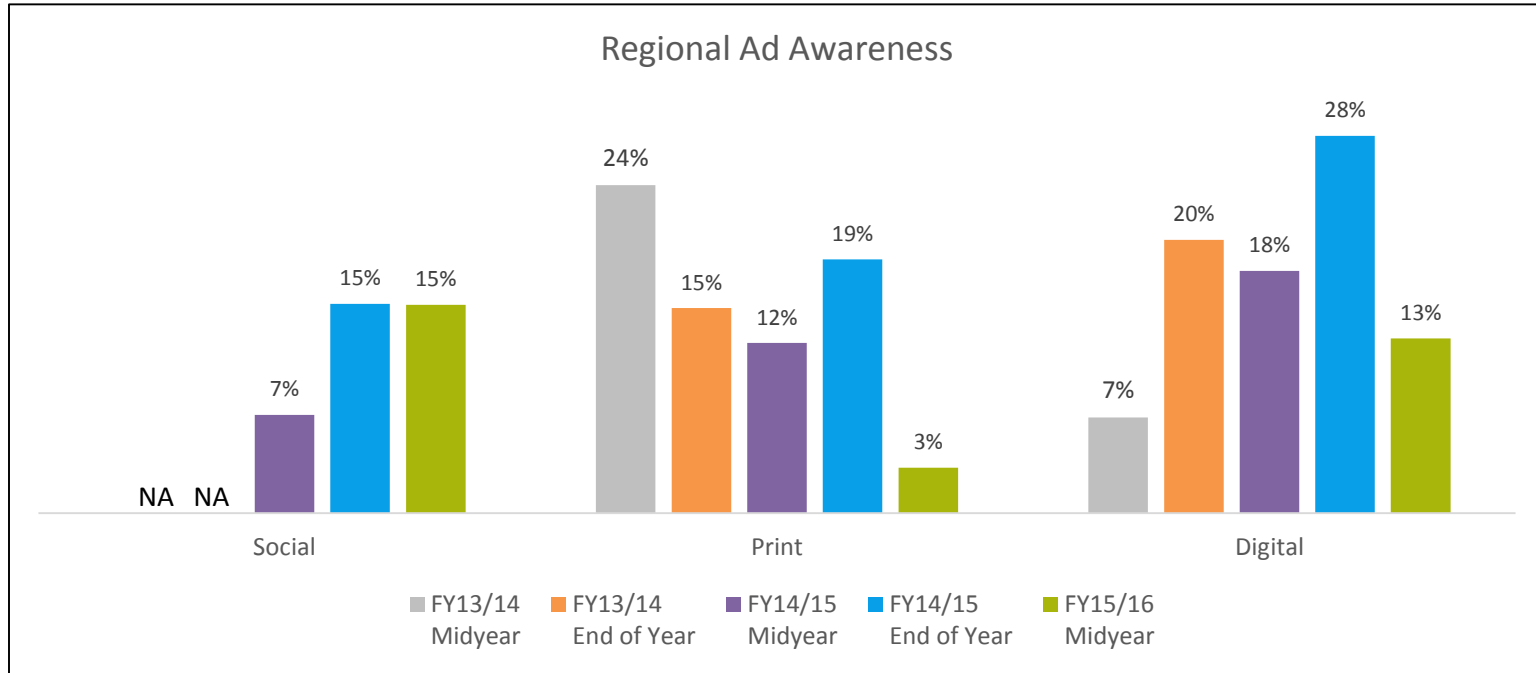
**Regional Markets**

# 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.

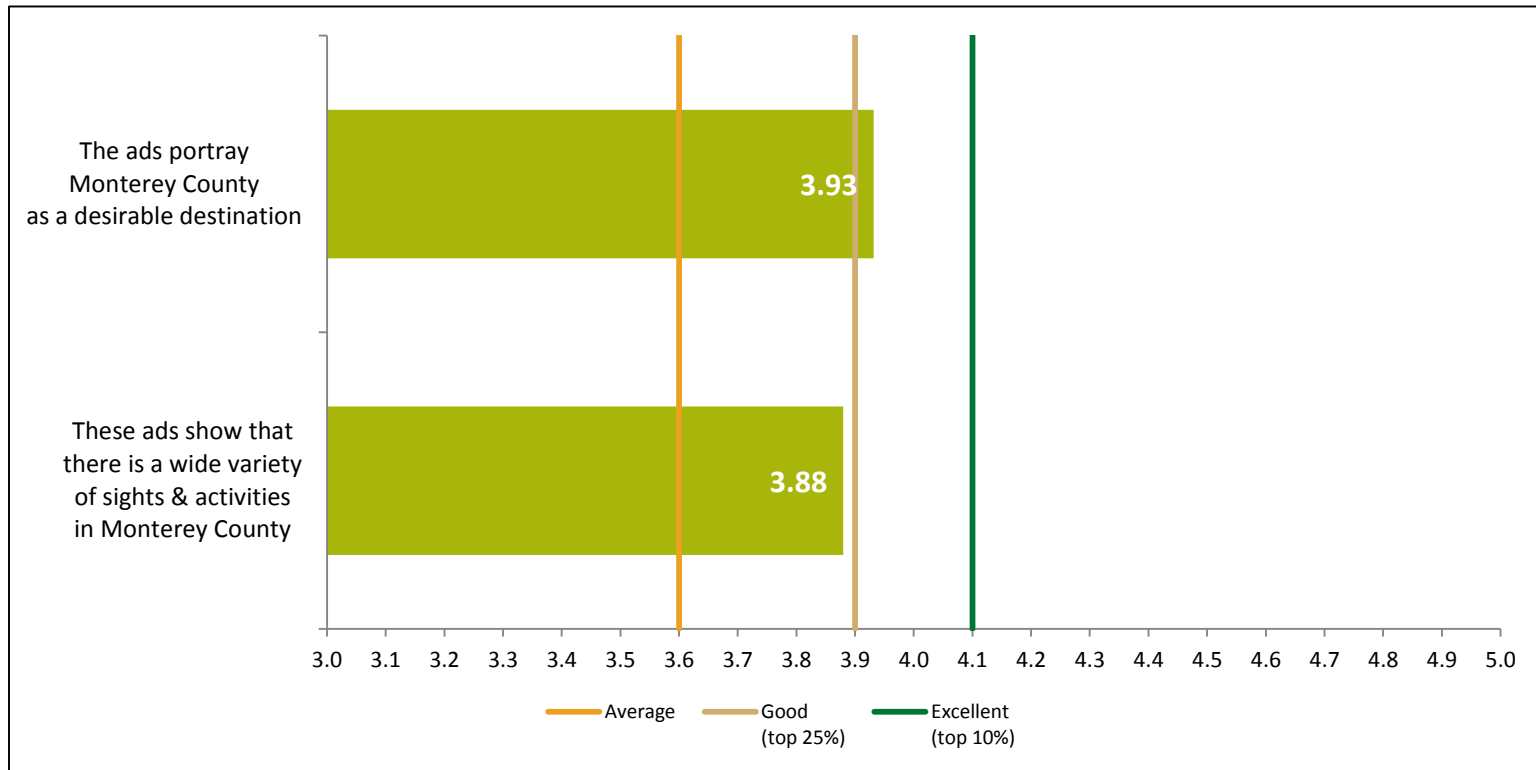
# FY15/16 Midyear Regional Review

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

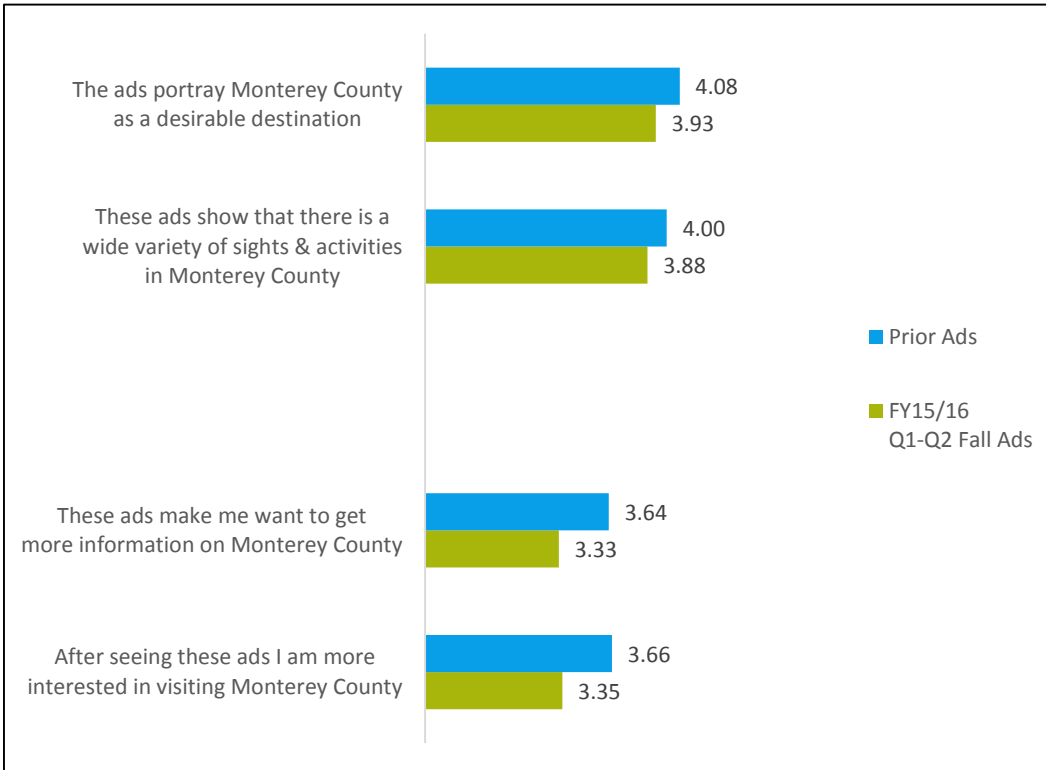


- While awareness declines are not unexpected due to new ads and lower spending, the sharp decline in print ad awareness is also likely related to showing just a few ads in news publications. Previous print campaigns have included as many as nine print ads and ran in news publications and magazines.

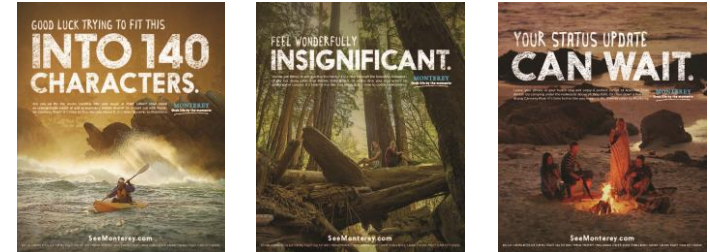
The fall creative is “good” (top 25%) at portraying Monterey as a desirable destination with a wide variety of sights and activities.



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



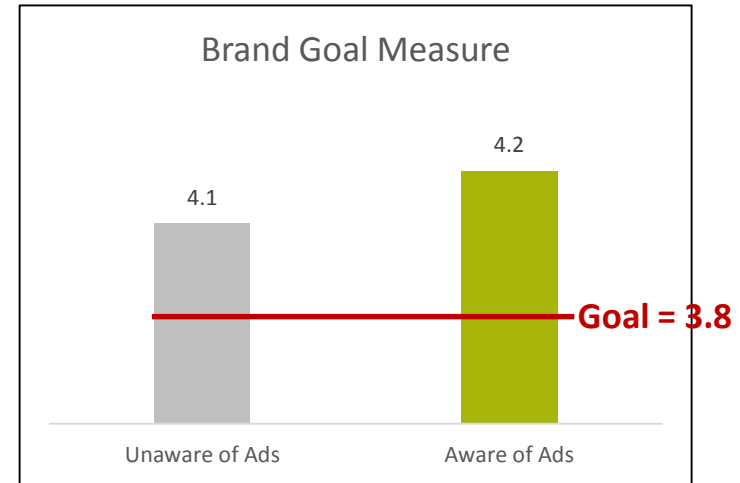
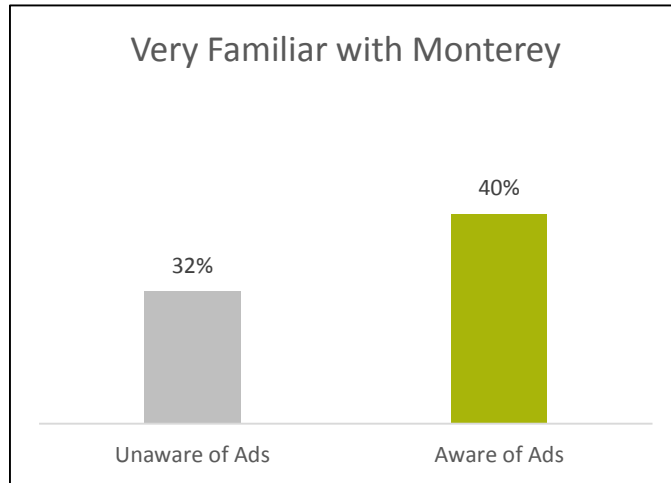
### FY15/16 Q1-Q2 Fall Ads Tested



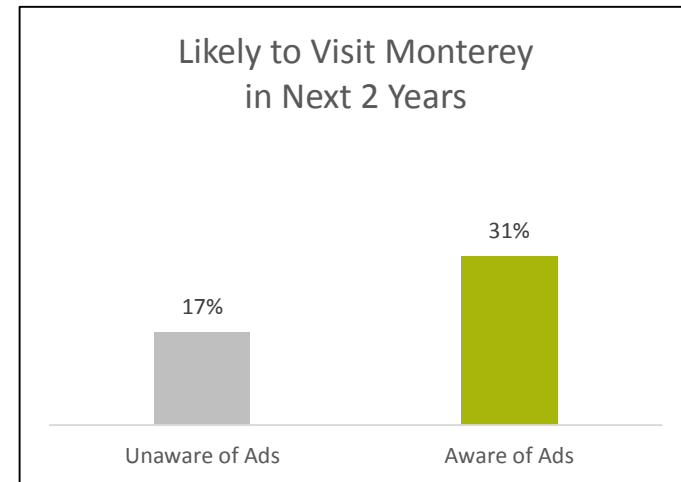
- Small differences in the way that the product is portrayed in the ads can make a big difference in the way that the audience reacts to them. In this case, the small difference is full page vs. partial page photos (and photo selection).
- These ratings are of course simply the evaluative reaction. The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

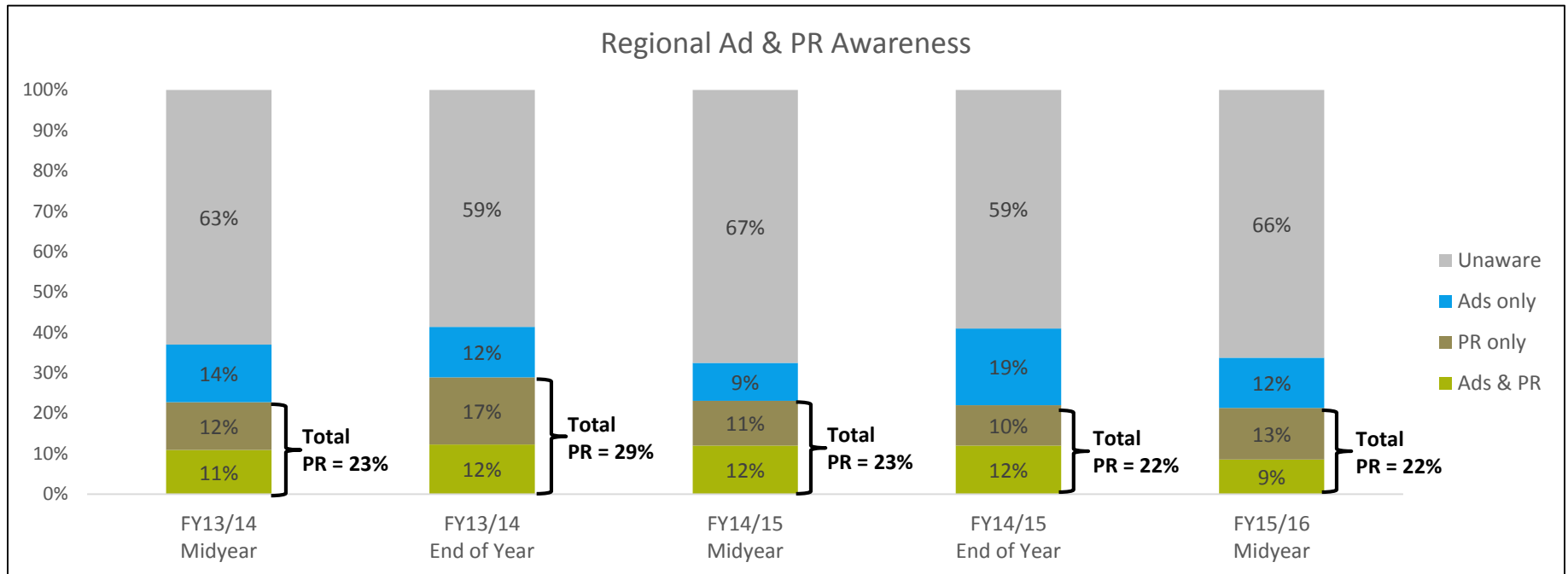
- This is similar to the level of ad-influenced visitor spending in the previous midyear assessments.

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

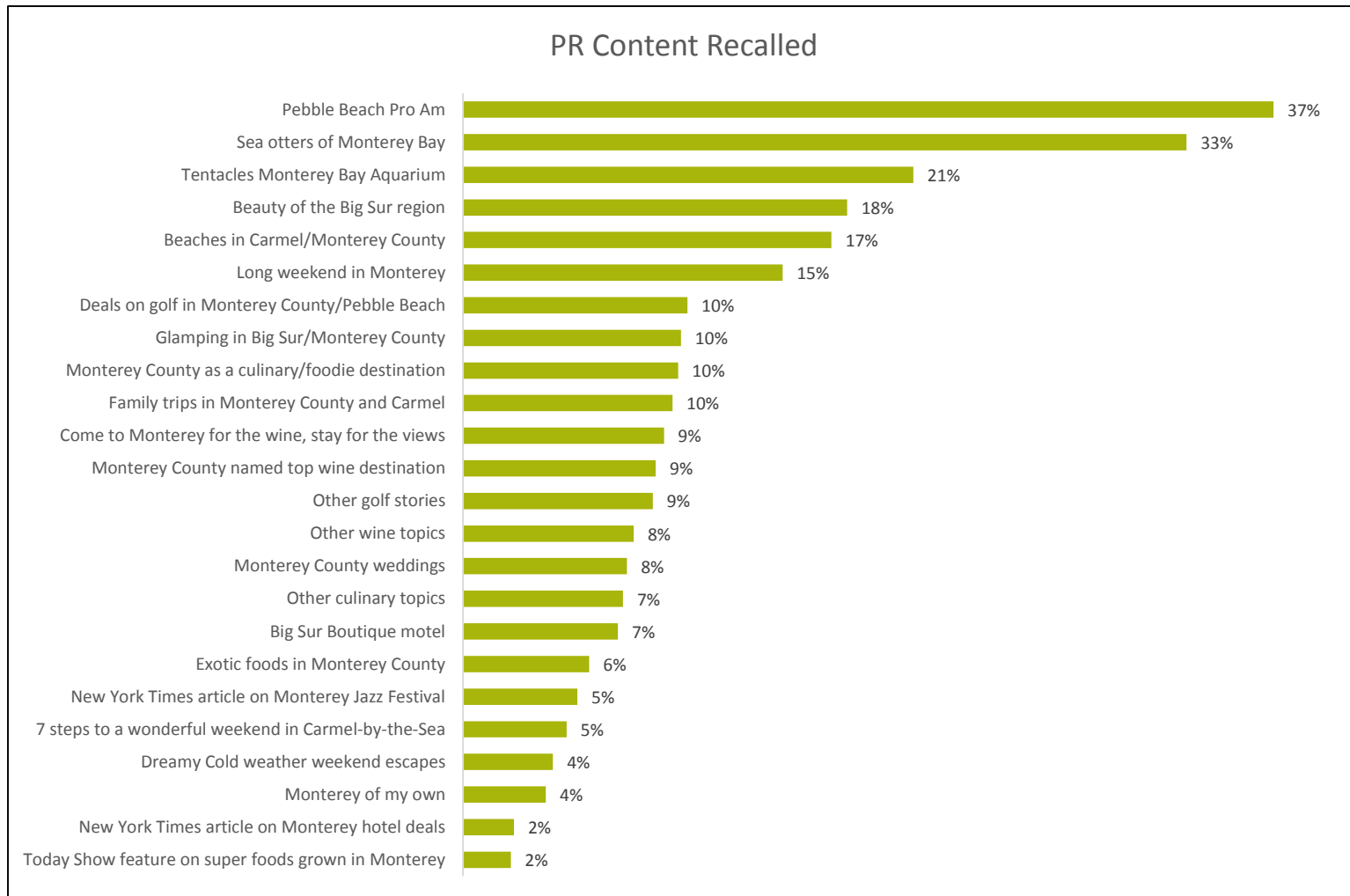
	<b>FY15/16 Midyear</b>
Incremental Overnight Traveling HHs	73,257
% staying in paid accommodations	68%
Ad-influenced trips staying in hotel, motel, inn, lodge, B&B or resort	50,155
Avg. # nights on trip	2.0
Ad-influenced room nights	100,310

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

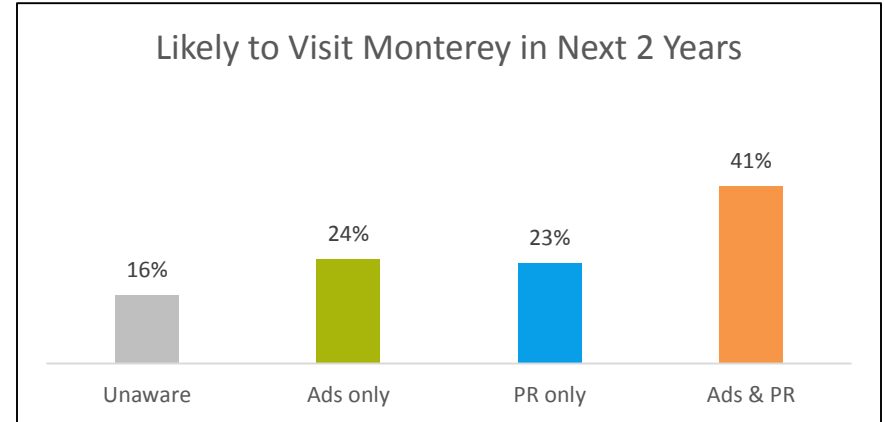
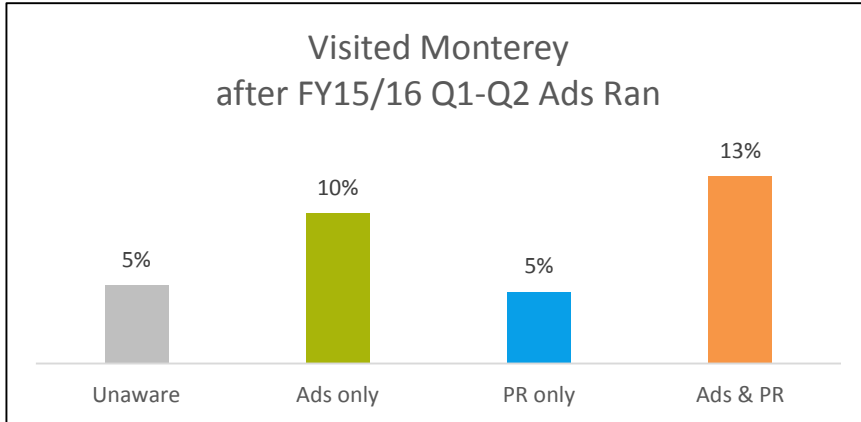
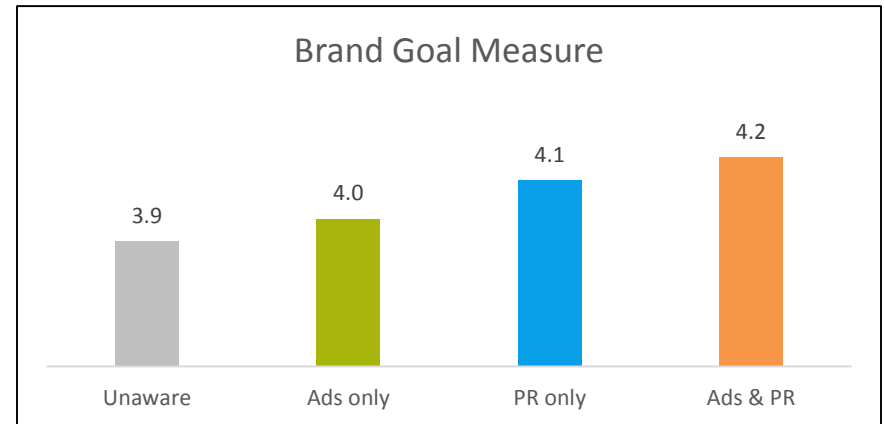
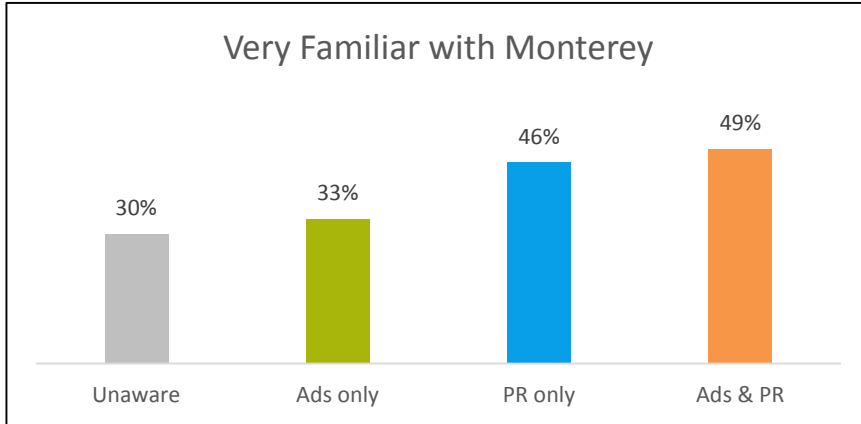
- Ad/PR overlap declined from 12% to 9%.
- Generating ad/PR overlap is important, as we generally see greater impact among those who have seen both. The impact of this overlap is explored later in this report.



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.



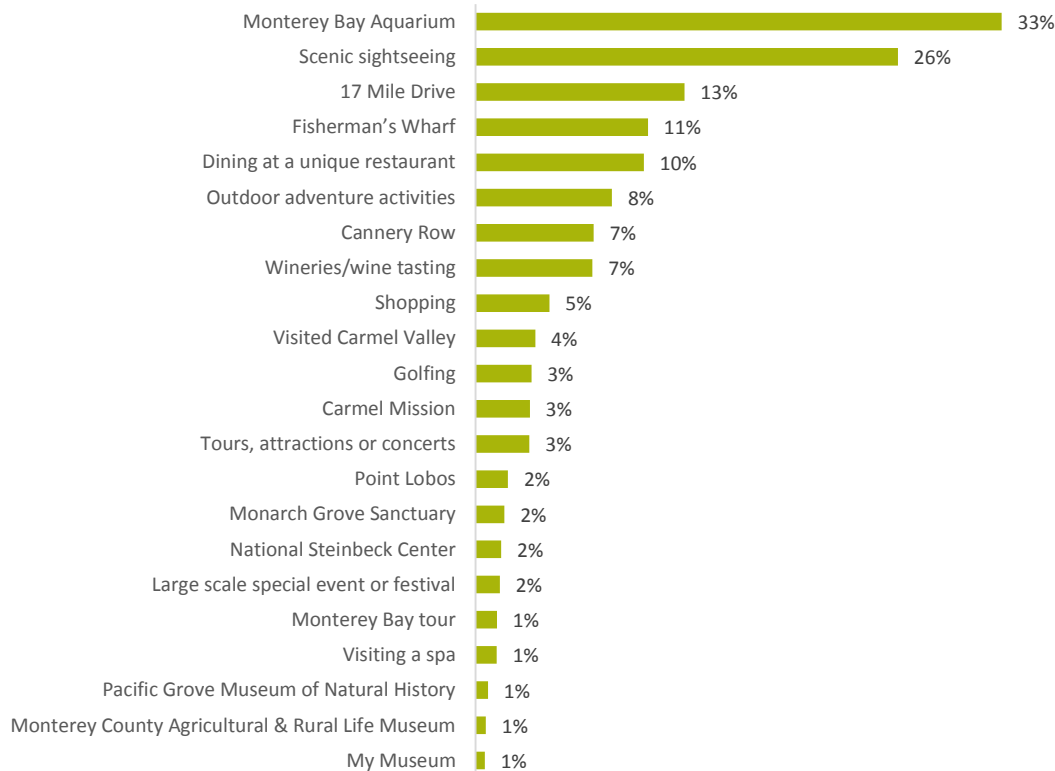
- MCCVB should continue to strive to generate ad/PR overlap.

# Regional Trip Specifics & Marketing Implications, FY15/16

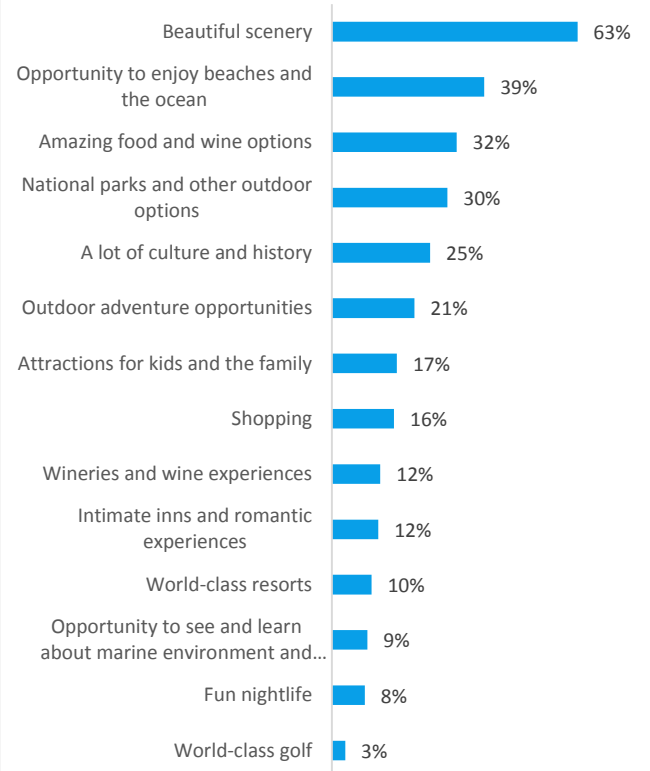


The top motivators of Monterey travel are the aquarium and general sightseeing. Other notable motivators include 17 Mile Drive, Fisherman's Wharf, and local dining.

### Major Influencers of Monterey Travel



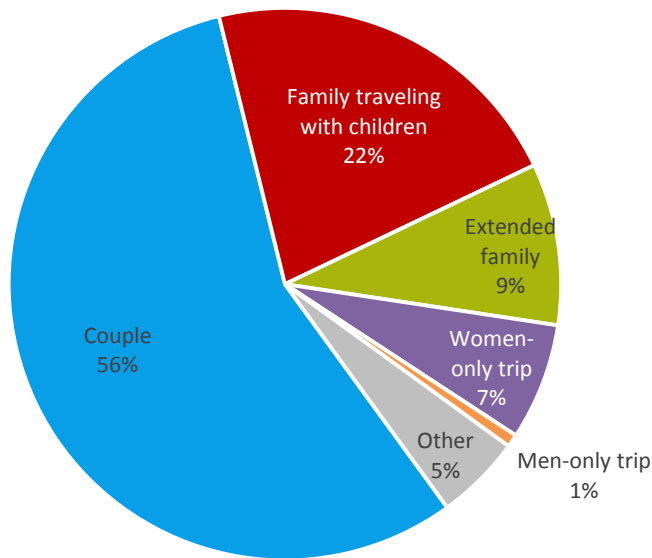
### General Travel Motivators



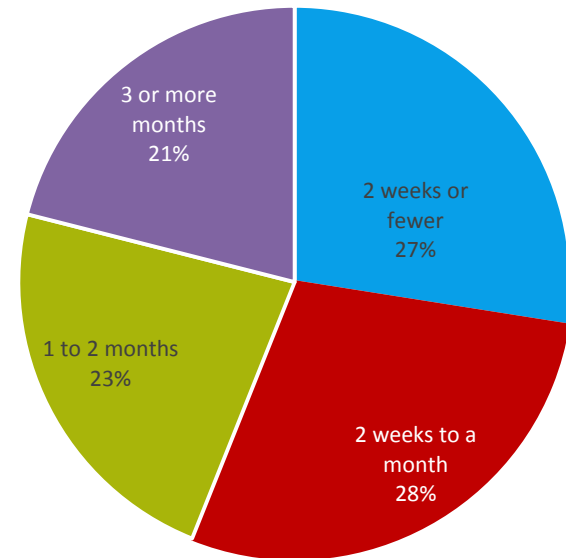
- The specific Monterey trip motivators and general travel motivators suggest that MCCVB should highlight Monterey's beautiful and dramatic scenery/natural attractions and unique local dining.

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

Travel Party



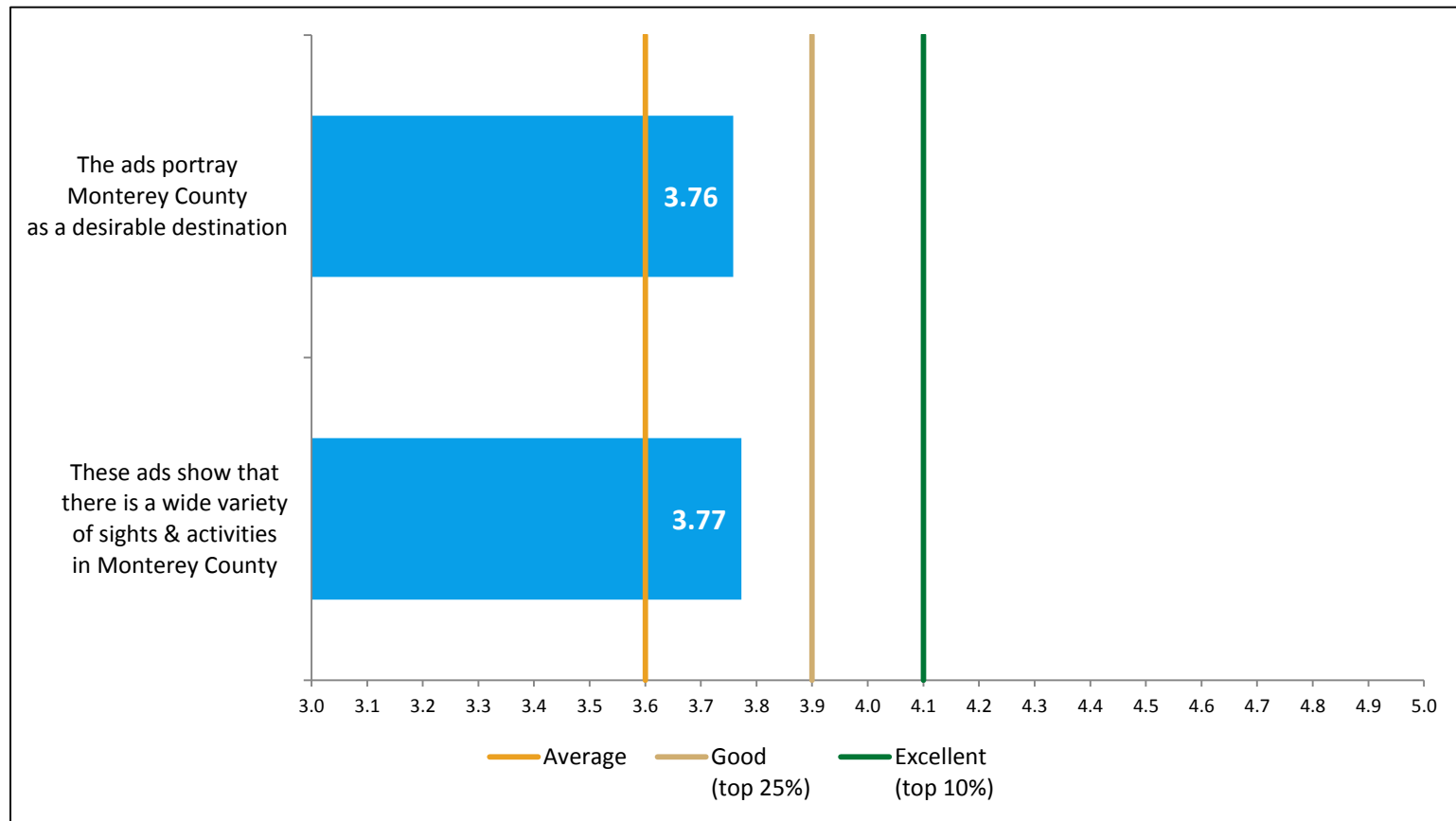
Monterey Trip Planning Period



- 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.

