



MCCVB
Marketing Intelligence Report FY17-18



Marketing Intelligence Report

FY2017-2018 Midyear Communication Effectiveness Study

By Strategy Marketing & Research Inc.

FY2017-2018 Visitor Profile Study

By Destination Analysts

MONTEREY
Grab life by the moments:

FY2017-2018 Midyear Communication Effectiveness Study

MONTEREY
Grab life by the moments:

Key Metrics

Midyear

	Regional	National
Ad impact on Monterey County visit interest (goal: 44%)	45%	36%
Unaided brand awareness (goal: 83%)	84%	64%
Brand goal measure (goal: 4.1)	4.3	3.8
Communication effectiveness (attribute ratings above 3.8):		
These ads and articles show that there is a wide variety of sights & activities in Monterey County	4.0	3.7
These ads and articles portray Monterey County as a desirable destination	4.0	3.7
Desirability index – vacation/getaway trip	10	-26
Desirability index – with children	-9	-51
Influenced room nights	338,209	*



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.

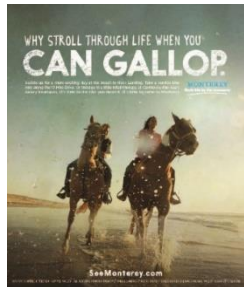
BACKGROUND & OBJECTIVES

- 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

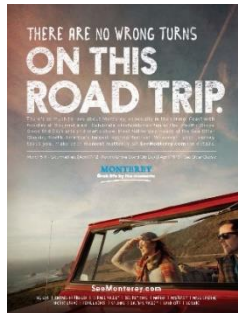
GRAB LIFE BY THE MOMENTS CAMPAIGN

- 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.

Fall 2013



Spring 2014



Fall 2015



Spring 2016



Fall 2016



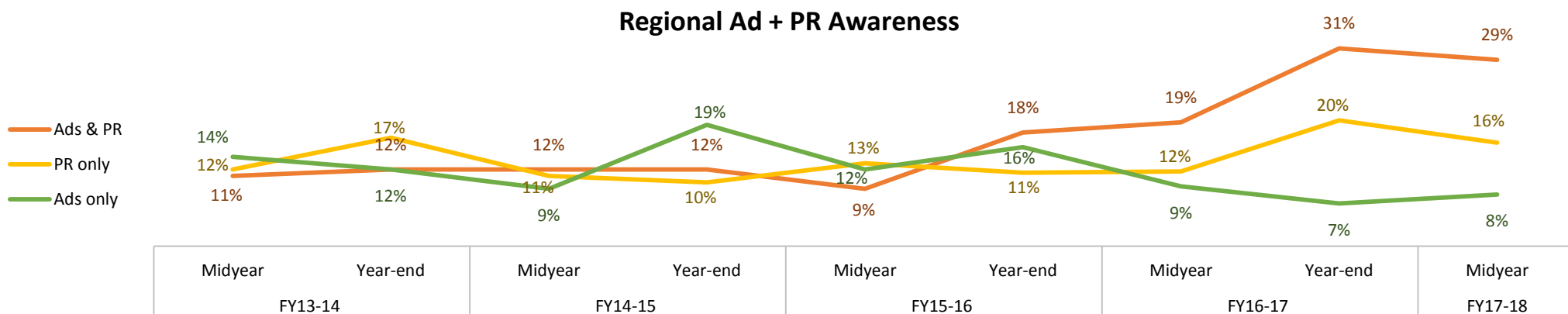
Spring 2017



Fall 2017

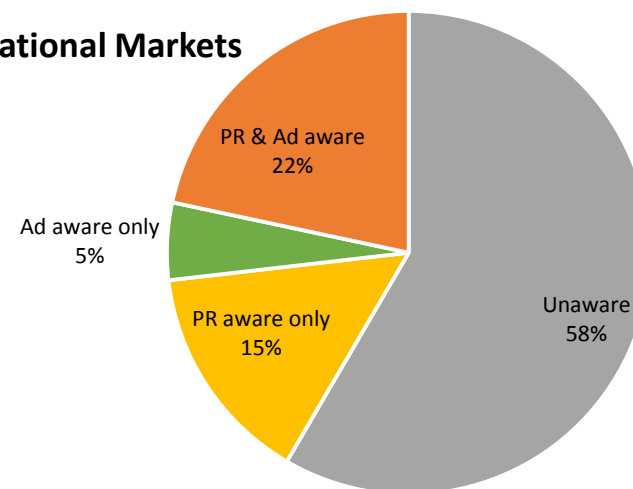


THE EFFECTIVENESS OF MCCVB'S CONTENT MARKETING STRATEGY SHOWS IN CONTINUED HIGH AWARENESS OF BOTH PAID ADS AND PR.

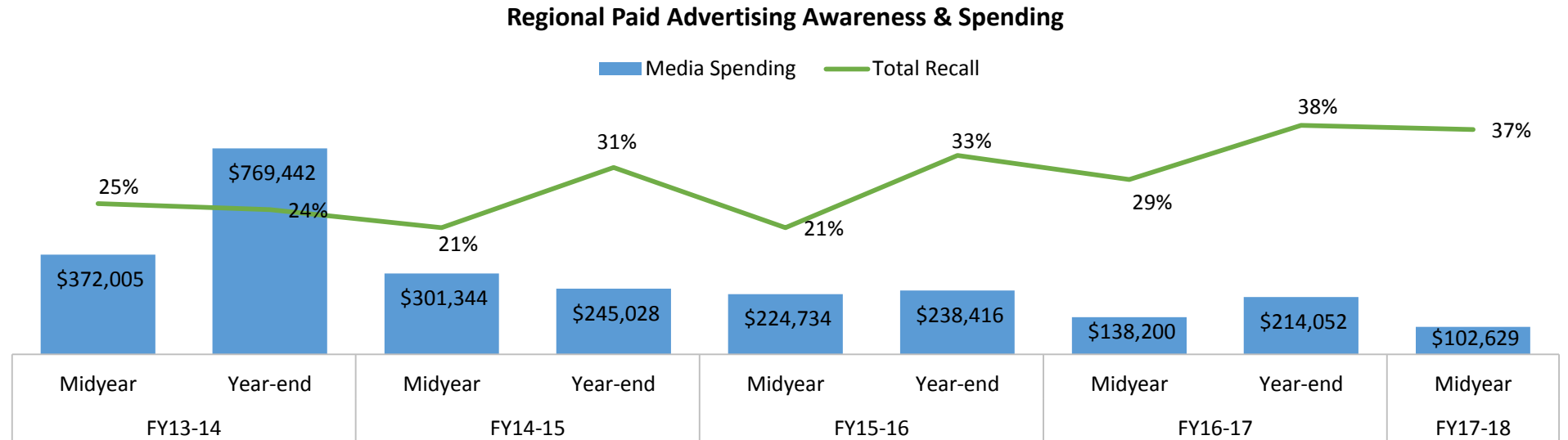


- Advertising awareness = aided recall of:
 - Print
 - Email
 - Digital banners
 - Social media
- PR awareness = aided recall of:
 - Native ads
 - Influencer blogs
 - Unaided recall of news stories, articles or feature stories about Monterey County destinations

Awareness in National Markets

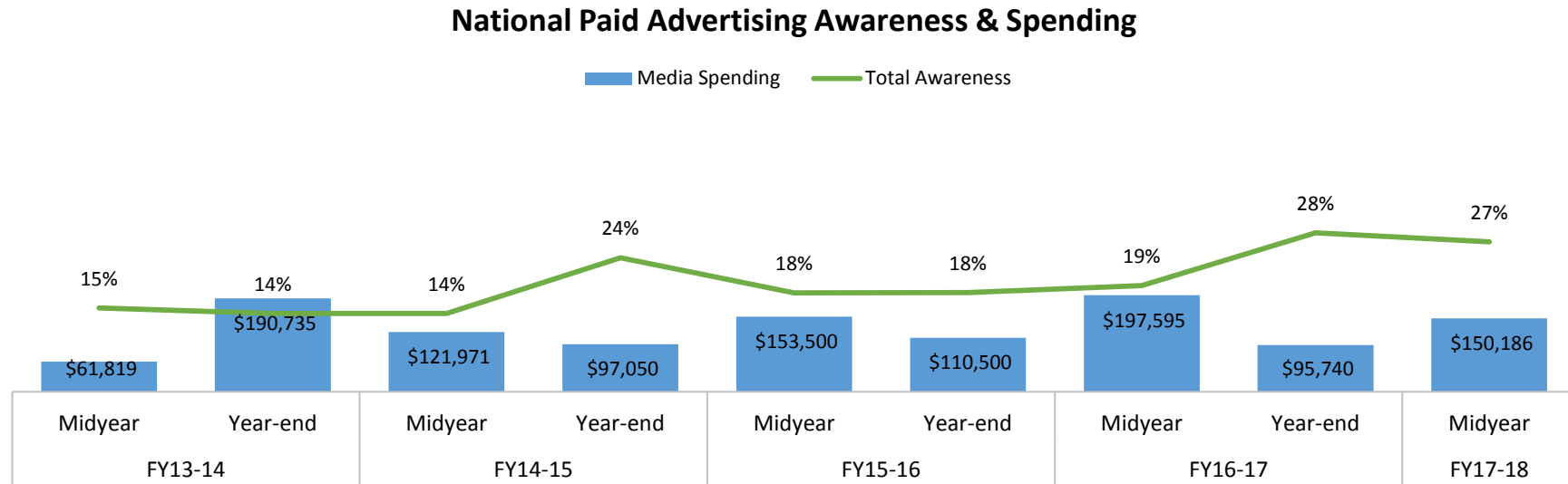


THIS IS MCCVB'S MOST EFFICIENT CAMPAIGN TO DATE. REGIONAL RECALL REMAINED HIGH DESPITE HALF THE SPENDING OF LAST YEAR-END.



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.

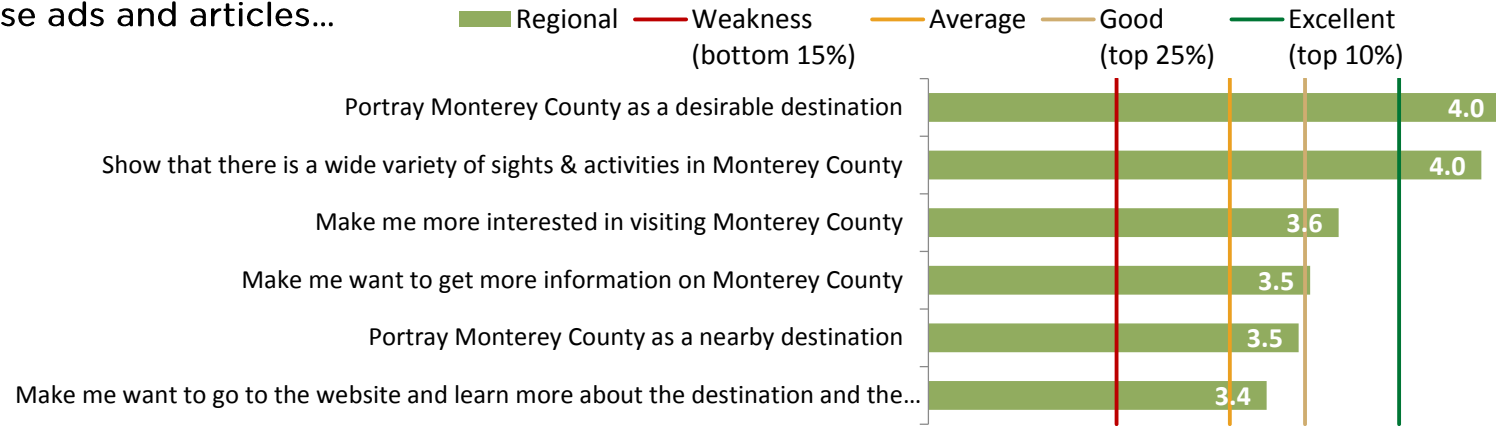


- In support of its goal to reach out to new, more distant markets to expand visit potential to the county, MCCVB invested more in the national markets than regional. With this level of reach, the paid advertising is laying the groundwork for future visits.

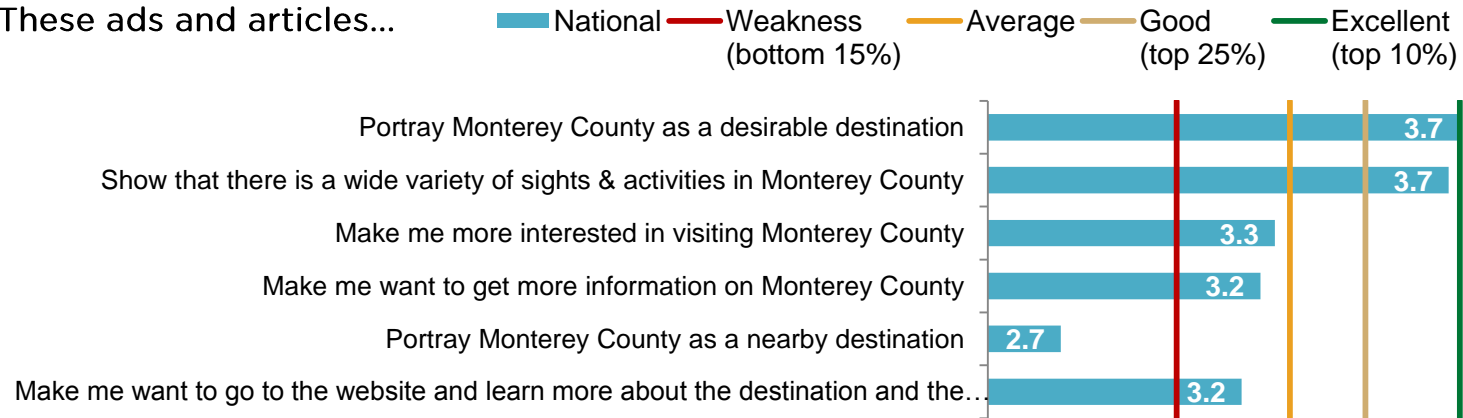
THE ADS ARE STRONGEST AT SHOWING MONTEREY COUNTY AS A DESIRABLE DESTINATION WITH A VARIETY OF SIGHTS + ACTIVITIES



These ads and articles...



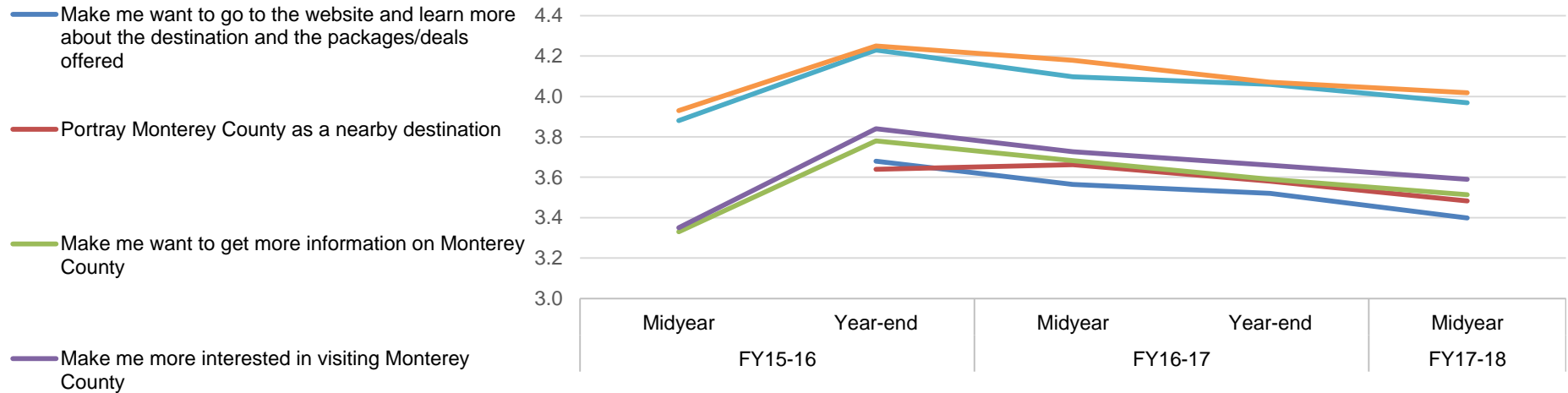
These ads and articles...



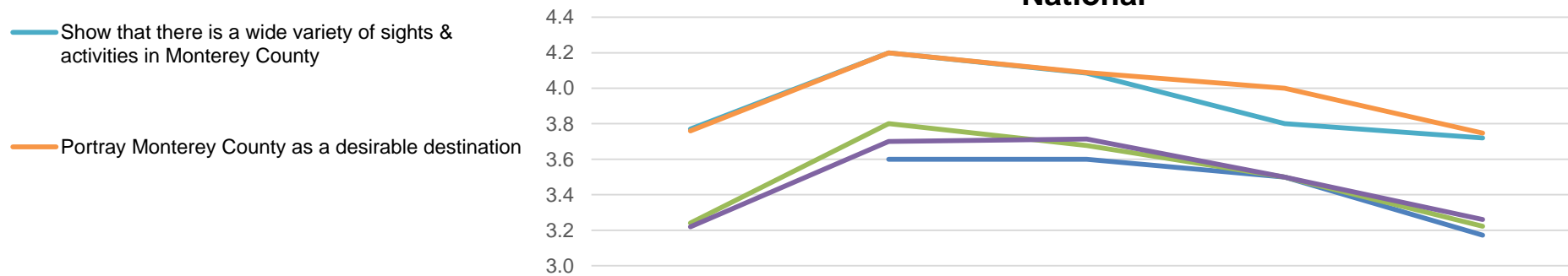
IN BOTH MARKET GROUPS, CREATIVE RATINGS HAVE SLOWLY DECLINED OVER TIME, INDICATING WEAR OUT OF THE CREATIVE.



Regional

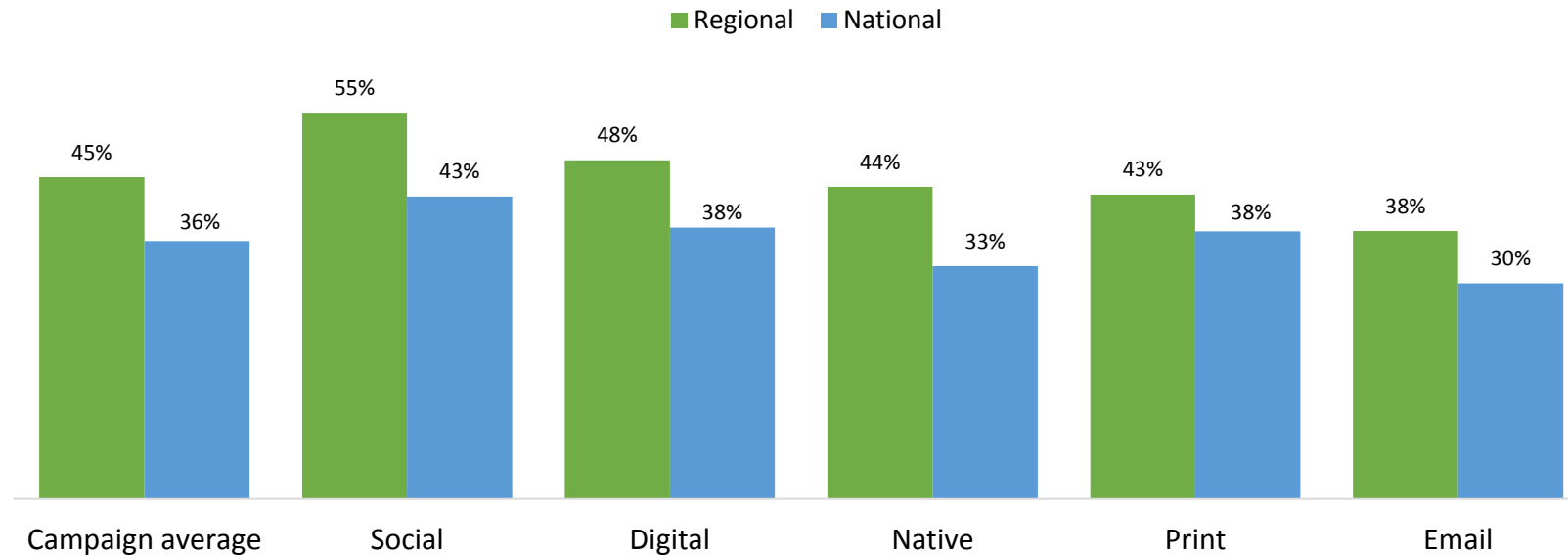


National



45% OF REGIONAL TRAVELERS AND 36% OF NATIONAL TRAVELERS AGREE THAT THE CAMPAIGN MAKES THEM WANT TO VISIT MONTEREY COUNTY

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



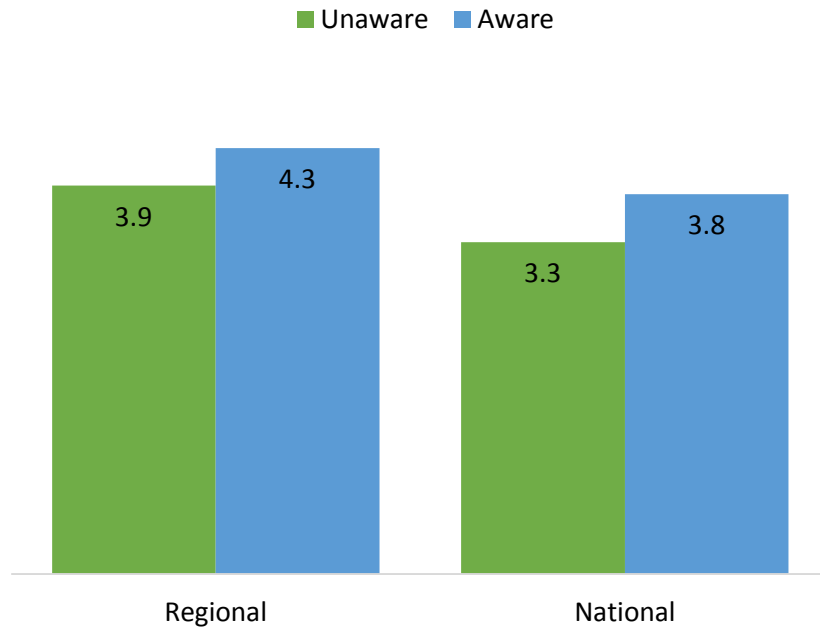
- In addition to rating key messaging, travelers were asked to rate the ads on how much they made them want to visit Monterey County. Like ad ratings, it was asked of all respondents whether they had seen the ads before or not. The question was asked by medium.

Impact of the Advertising

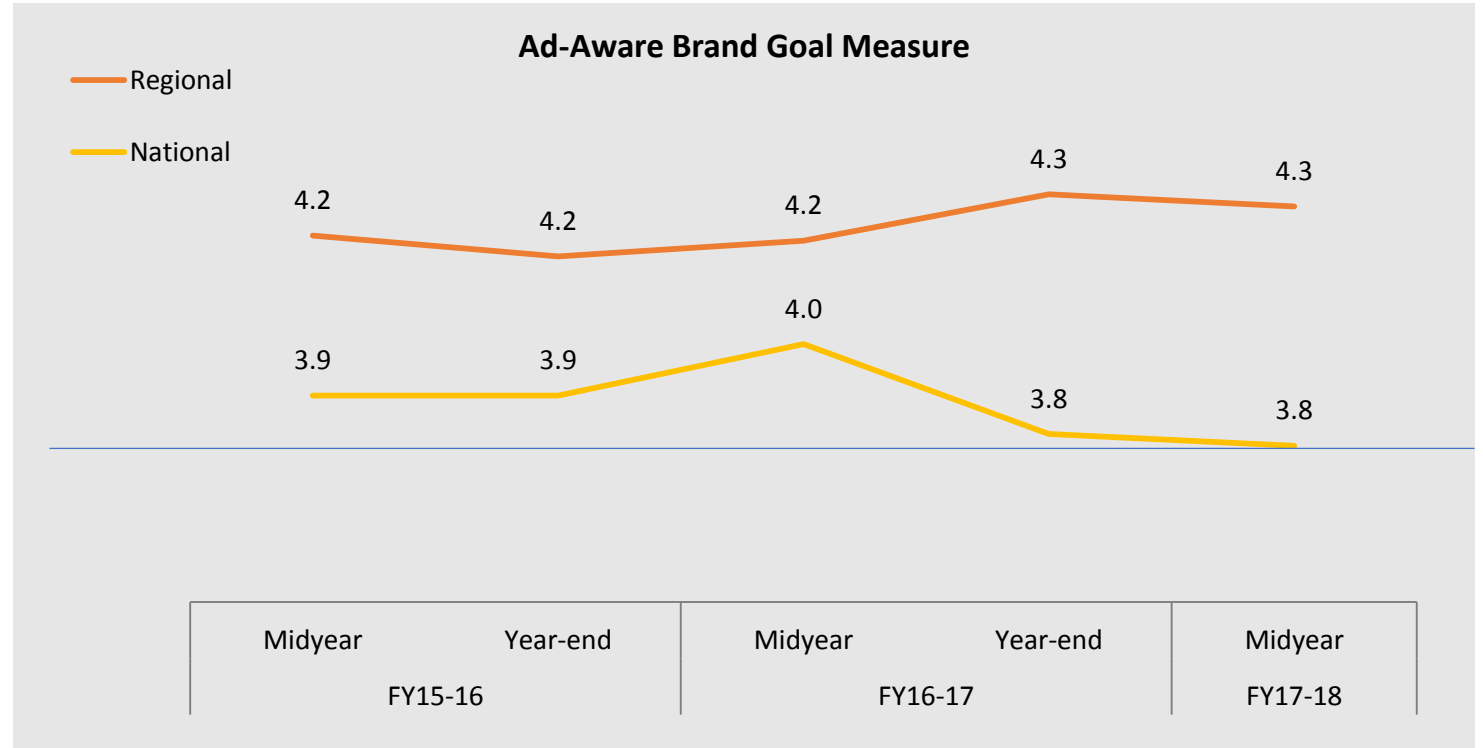
MONTEREY
Grab life by the moments:

MCCVB'S ADS AGAIN BOOST THE BRAND MEASURE ABOVE THE GOAL IN REGIONAL MARKETS. NATIONAL MARKETS ARE AT THE BASELINE.

Ad Impact on Brand Goal Measure



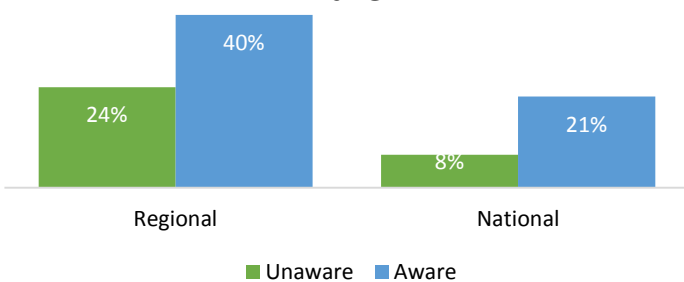
Ad-Aware Brand Goal Measure



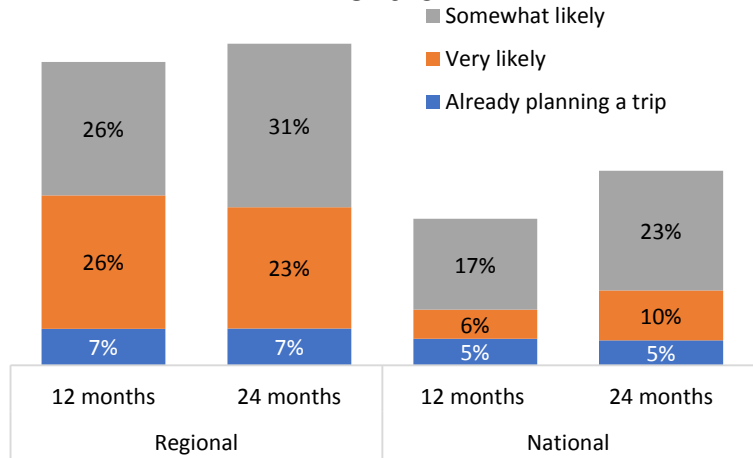
- The brand measure is derived from travelers' ratings of Monterey County's amazing scenery and its image as a charming place and a good weekend getaway destination. The latter attribute contributes to national markets' lower measure, as travelers typically view farther away destinations as places to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

THE CAMPAIGN BOOSTS LIKELIHOOD TO TRAVEL, BOTH IN THE COMING YEAR AND IN THE NEXT TWO YEARS.

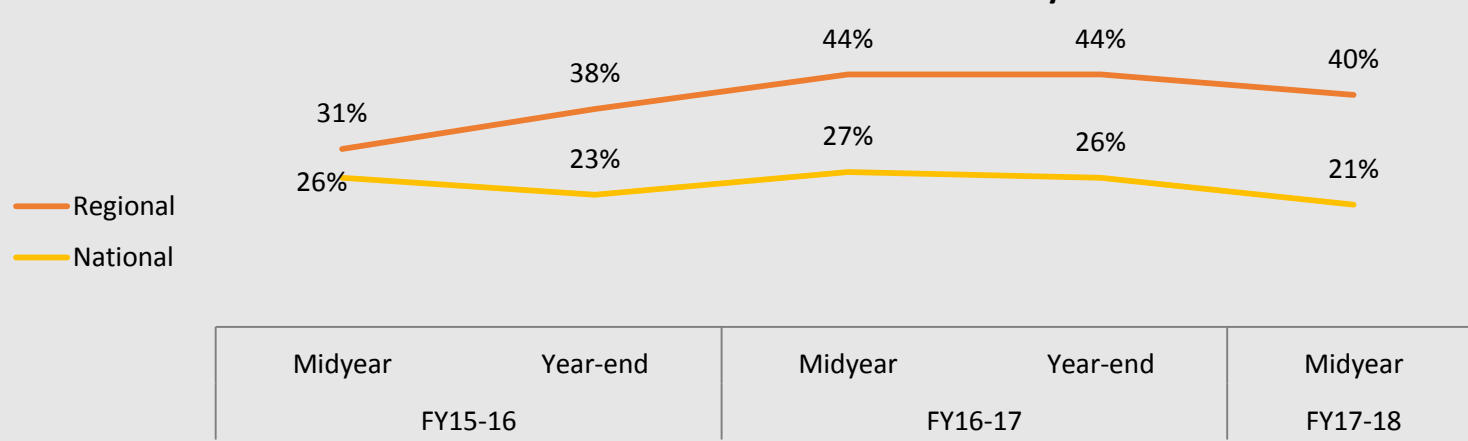
Ad Impact on Monterey Likelihood to Travel



Likelihood to Travel in Next 12 vs. 24 months



Ad-Aware Likelihood to Travel to Monterey



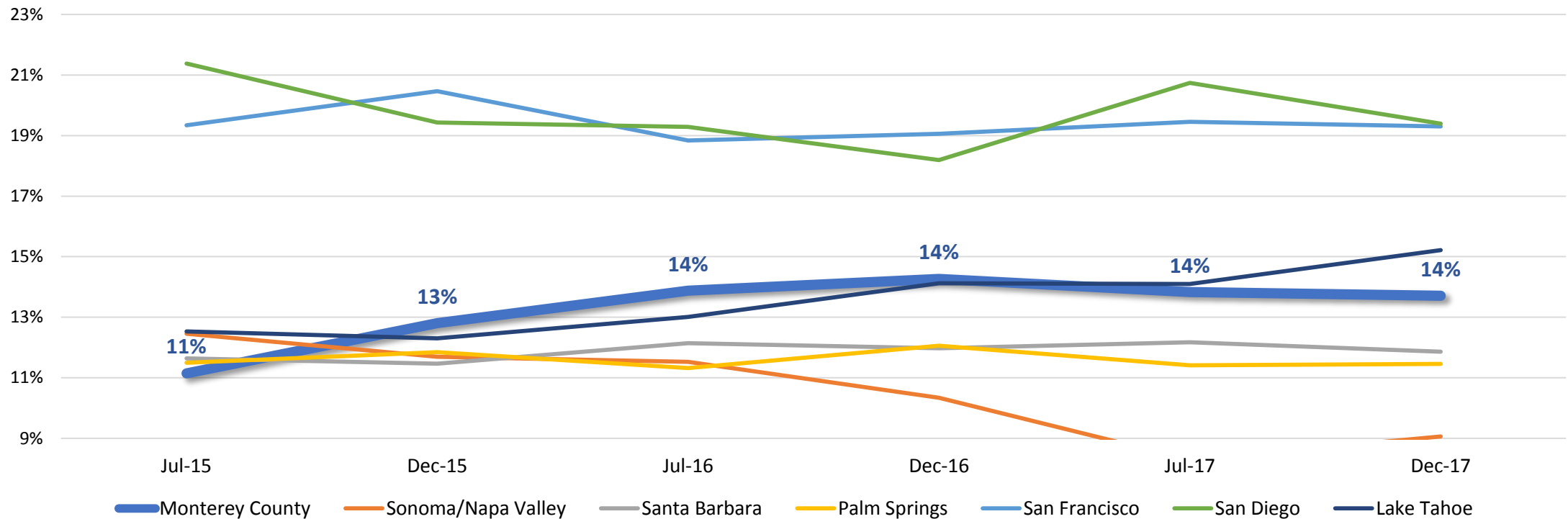
- Weather-related interruptions to some destinations within the county, and much news coverage of these events, may have created confusion about whether the county is fully open for visitors. This is also true of Napa Valley, as the data on the following page illustrates.



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.

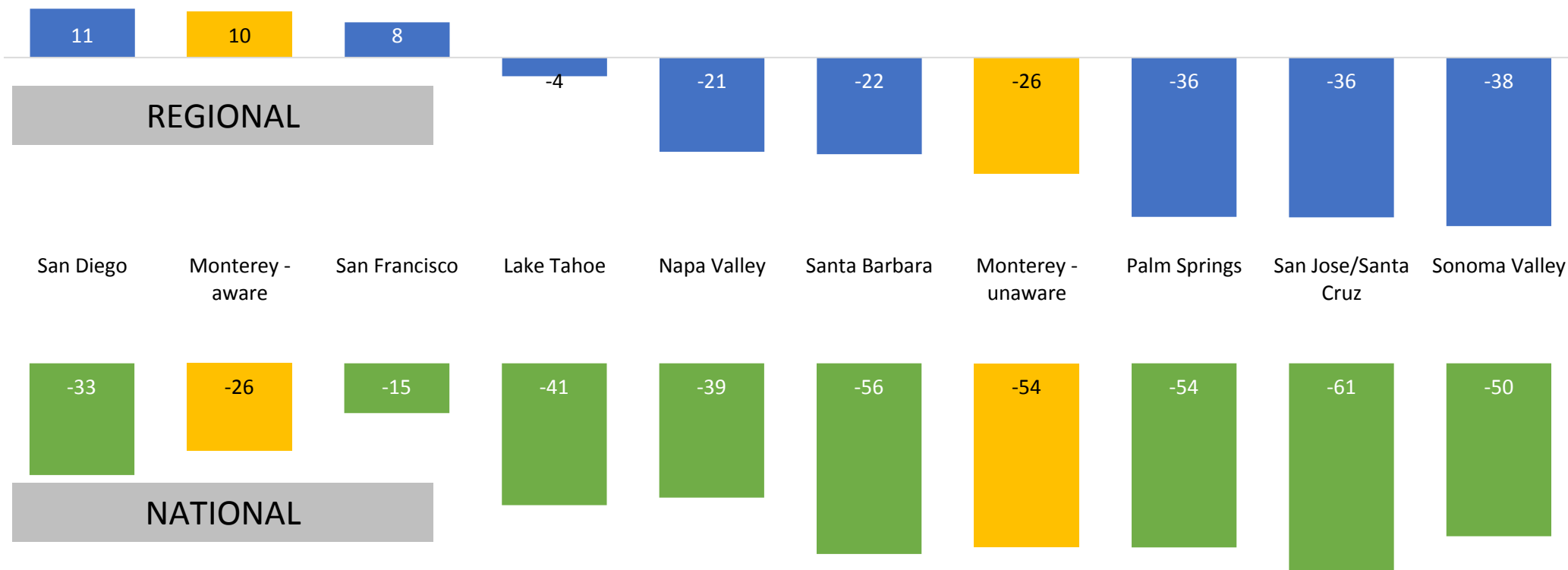
MONTEREY'S SHARE OF TOTAL VISIT INTENT WITHIN THE COMPETITIVE SET REMAINS AT 14% BEHIND SAN DIEGO + SAN FRANCISCO; LAKE TAHOE CAPTURED A GREATER SHARE AS OF THIS MIDYEAR MEASURE

Intent Shares - Regional



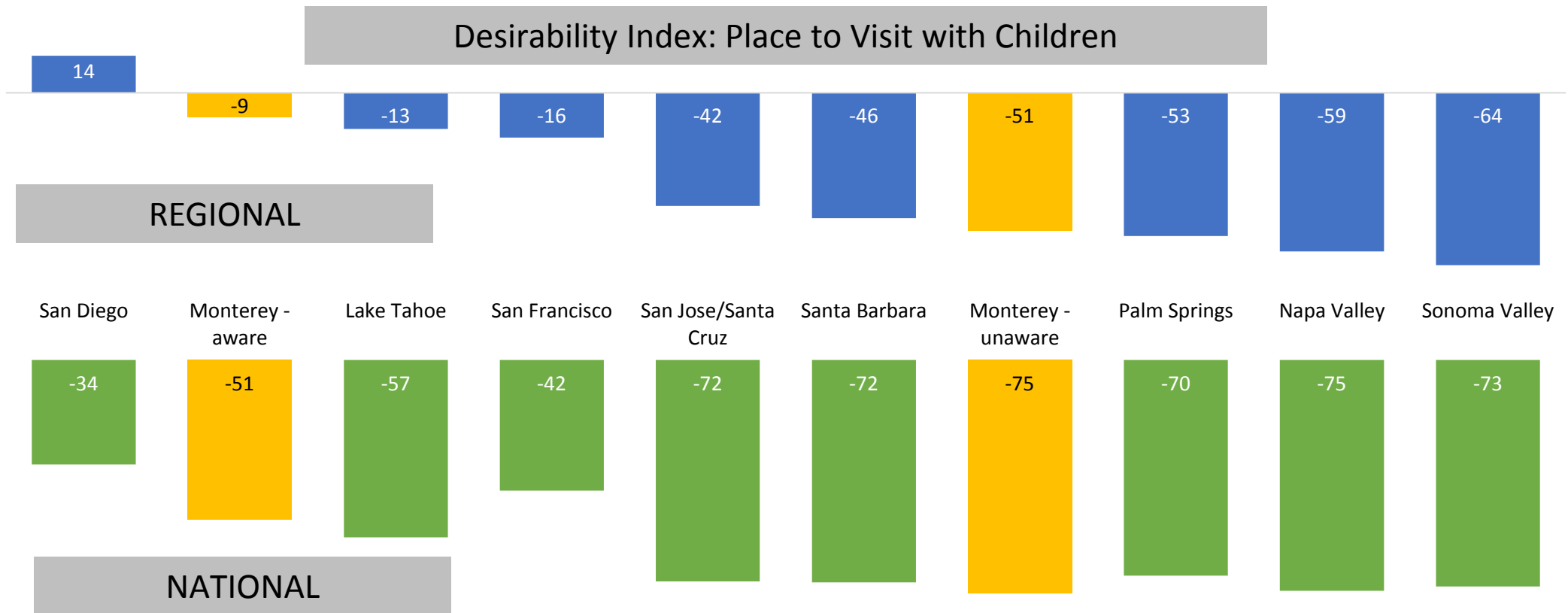
THE ADS BOOST MONTEREY COUNTY'S COMPETITIVENESS AS A VACATION/GETAWAY TRIP IN BOTH MARKET GROUPS.

Desirability Index: Place to Go for a Vacation/Getaway Trip



- 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.

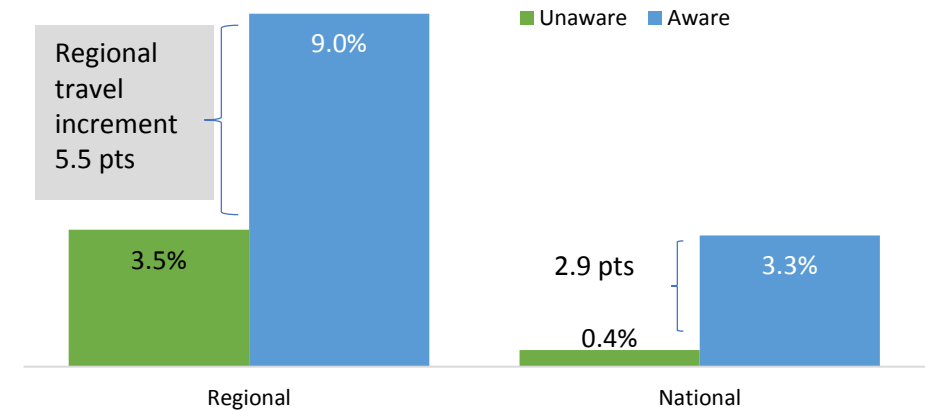


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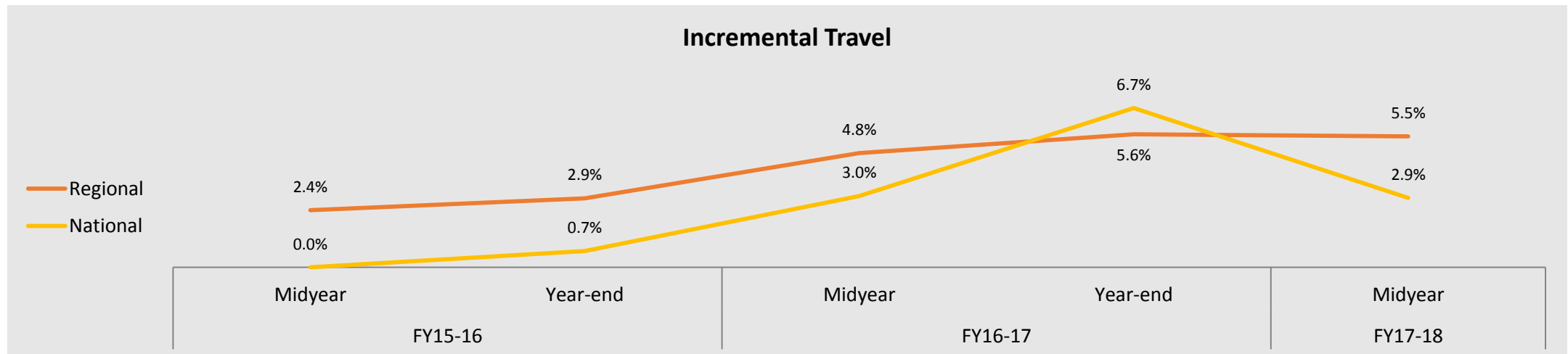
THE ADS CONTINUE TO GROW INCREMENTAL TRAVEL FROM REGIONAL MARKETS.

- 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

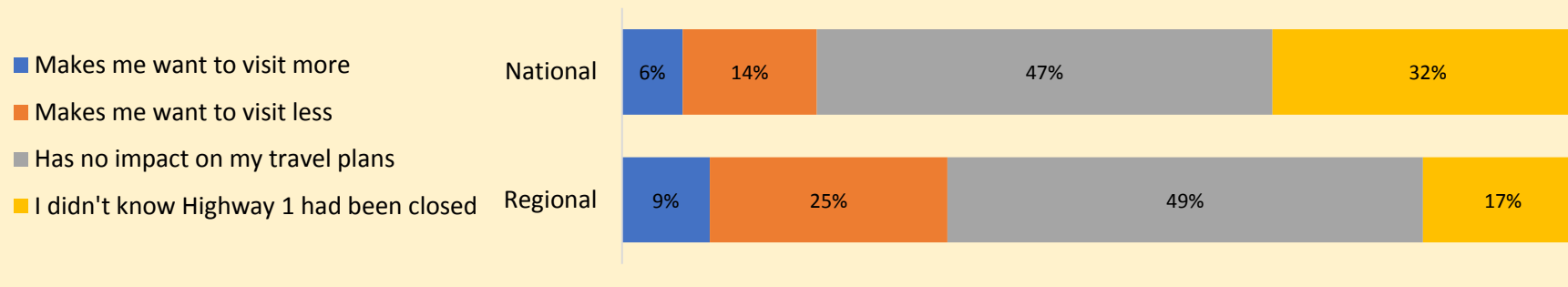


Strategic Considerations

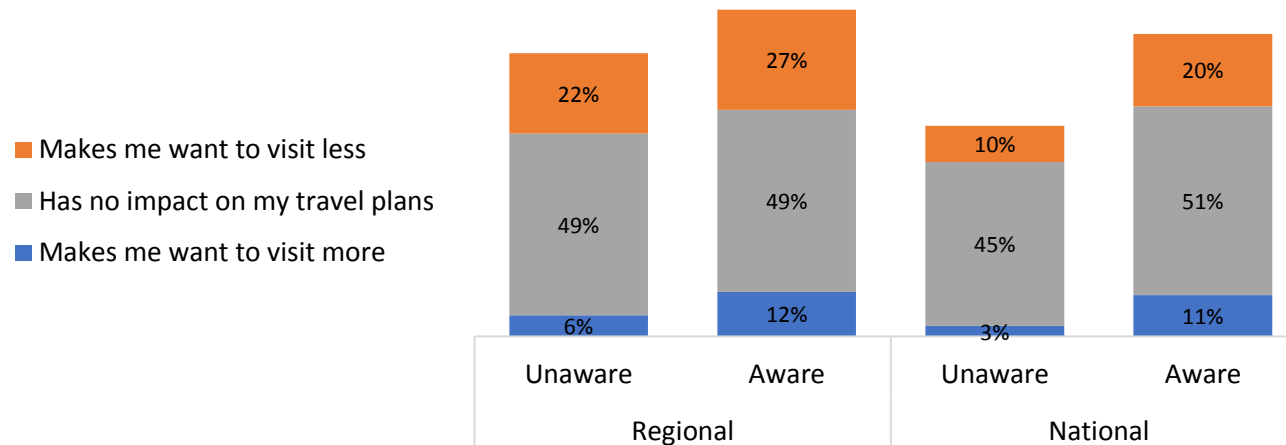
MONTEREY
Grab life by the moments:

THE ADS INSULATE THE BIG SUR AREA, TO A DEGREE, AGAINST NEWS REPORTS ABOUT WEATHER EVENTS

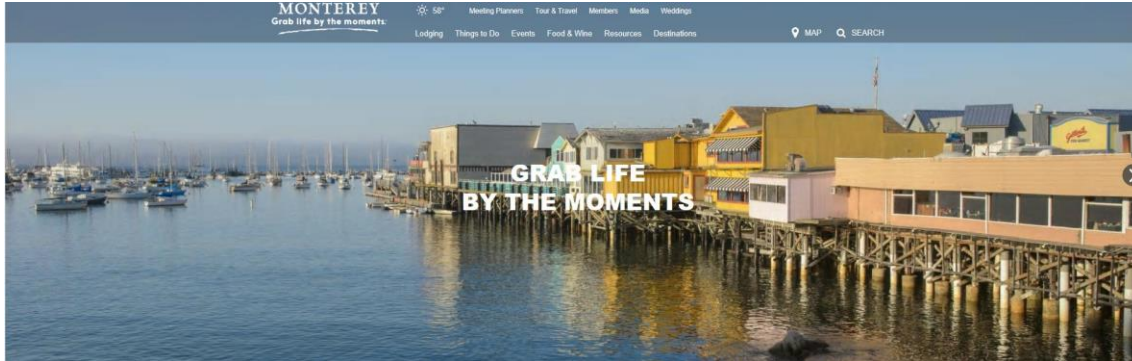
How does the recent closure of Highway 1, along the Big Sur Coast, and area mudslides affect your likelihood to visit in the next 12 months?



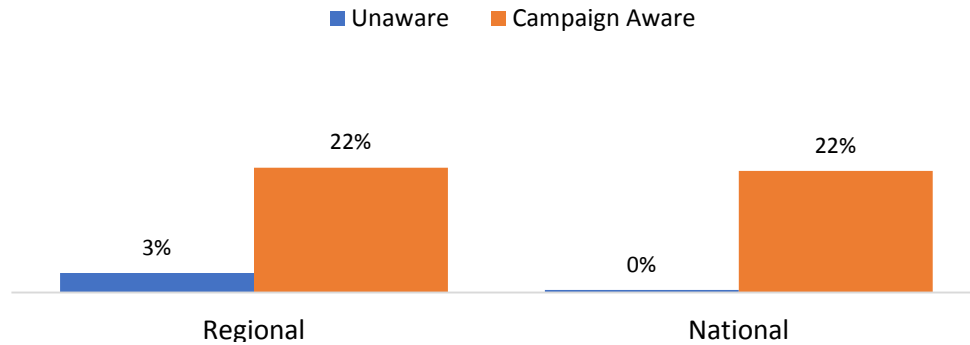
Visit Interest by Marketing Awareness



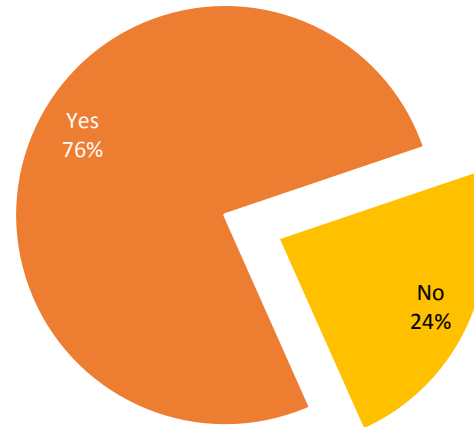
THE CAMPAIGN INFLUENCES WEBSITE VISITS, USED BY MOST TO PLAN A MONTEREY COUNTY VISIT, AND SOCIAL MEDIA ENGAGEMENT



Website Visitation by Campaign Awareness

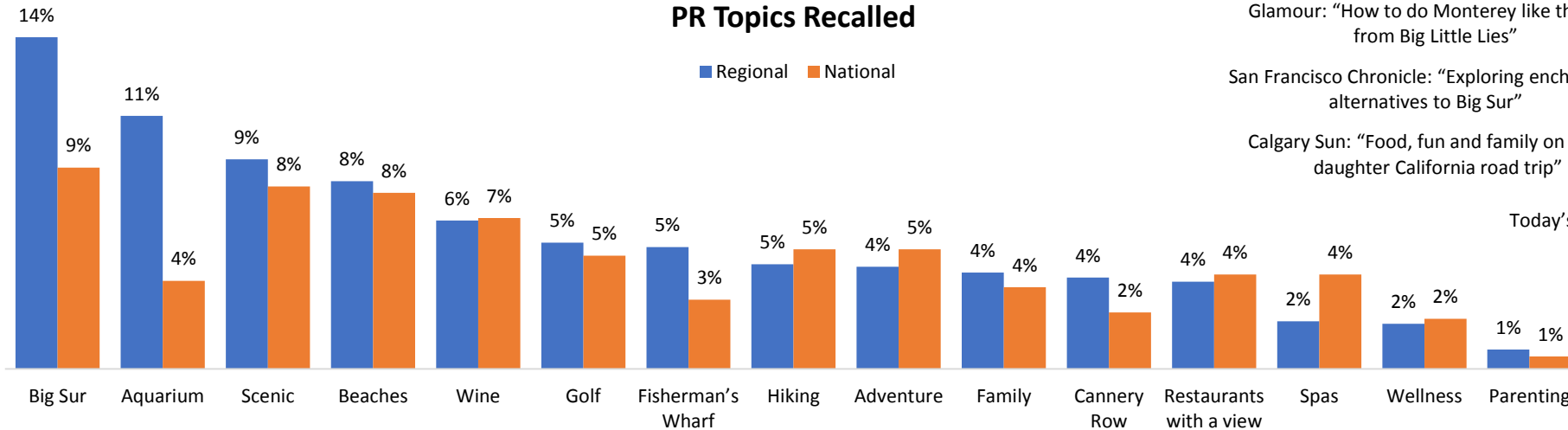
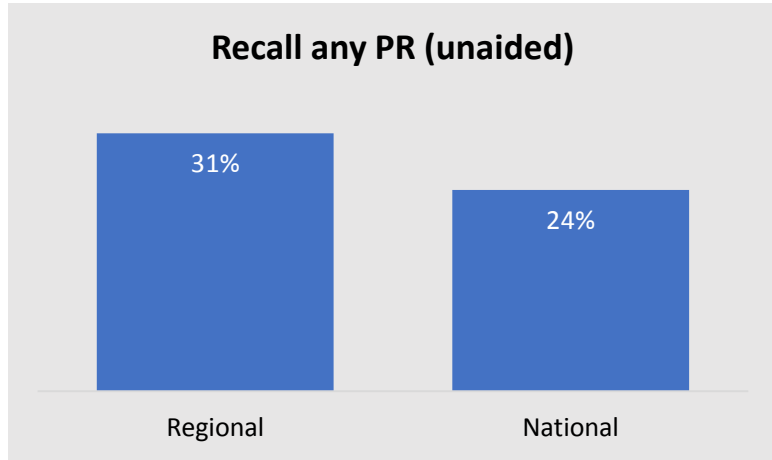


Had you already decided to visit Monterey County when you went to the website?

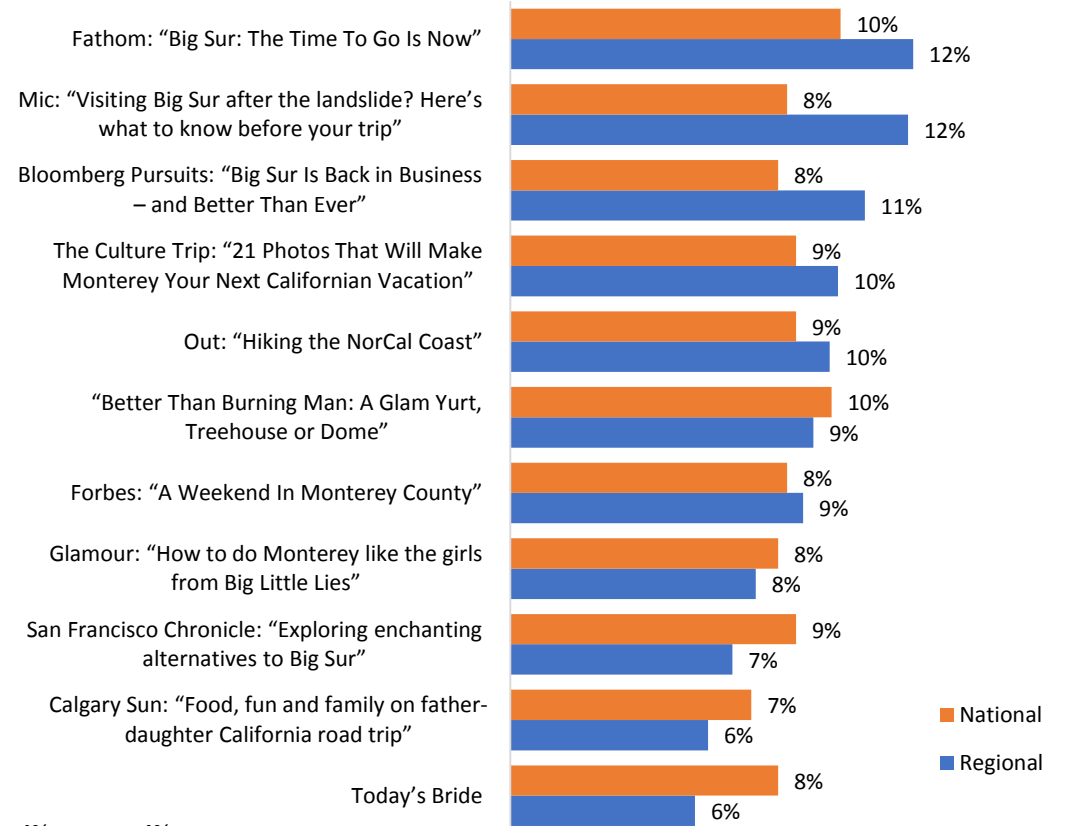


Have you visited MCCVB's sites on...?	Regional		National	
	Unaware	Aware	Unaware	Aware
Facebook	4%	27%	1%	32%
YouTube	3%	19%	1%	18%
Google+	1%	16%	1%	16%
Instagram	2%	15%	0%	15%
Pinterest	2%	9%	0%	18%
Twitter	1%	8%	0%	14%
Snapchat	1%	8%	0%	12%
Blog Monterey	0%	6%	0%	9%
Flickr	0%	3%	1%	7%

CONTENT MARKETING – PUBLIC RELATIONS



Specific Articles Recalled





FY2017-2018 Visitor Profile Study

By Destination Analysts

RESEARCH OVERVIEW

This report presents the findings of a comprehensive visitor profile development study conducted by Destination Analysts, Inc. on behalf of the Monterey County Convention & Visitors Bureau. The data presented here comes from an intercept survey of Monterey County visitors at locations throughout the county, as well as from a self-administered survey distributed to guests at Monterey County lodging properties.

This report presents the top-line survey data collected from these surveys between January and December 2017.



RESEARCH OBJECTIVES

The overarching goal of this survey-based research was to create an in-depth profile of the Monterey County visitor, including developing the following marketing intelligence:

- 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, and
- Demographic and geographic profiles



In addition to developing a comprehensive, multi-segment Monterey County visitor profile, data from this research can also be used to provide further detail into the economic impact of tourism to Monterey County.

METHODOLOGY

The research includes two separate yet carefully integrated survey collection techniques. Destination Analysts, working closely with the Monterey County Convention and Visitors Bureau, prepared a base survey questionnaire that was fielded in two ways: (1) an intercept survey of visitors to Monterey County collected at locations around the area, and (2) a self-administered survey of Monterey County lodging guests distributed at their accommodations property.

This report presents data collected through December 2017 of this annual project, from both the Visitor Intercept Survey as well as the Lodging Guest Survey. In total, 1,066 completed surveys were collected from three different key groups of visitors:

1. Visitors staying in a lodging property in Monterey County (Lodging Guests)
2. Visitors staying in the private home of a friend or relative in Monterey County (Visiting Friends & Relatives)
3. Day-trippers to Monterey County - regional residents coming to the county for the day as well as those on trips staying overnight elsewhere in the surrounding areas (Day-Trippers)

The survey also collected data from visitors staying overnight in Monterey County in private home rentals (i.e. rented through Airbnb). The combined visitor data from both surveys was weighted to reflect the actual population of visitors to Monterey County based on their place of stay. To weight the data, the incidence of visitors (by place of stay) experienced in the intercept survey was used. This step was taken to avoid over-representing lodging guests in the overall population of the visitor sample.

VISITOR INTERCEPT SURVEY OVERVIEW

An in-person survey was conducted of visitors to Monterey County. 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.

Surveys were collected at the following locations:

- Alvarado St
- Carmel-by-the-Sea
- Carmel Plaza
- Downtown Salinas
- Lover's Point
- Monterey Bay Aquarium
- Fisherman's Wharf
- InterContinental The Clement Monterey
- Monterey Plaza Hotel & Spa



Destination Analysts' staff surveying visitors on Cannery Row

LODGING GUEST SURVEY OVERVIEW

The Monterey County Lodging Guest Survey was a self-administered survey conducted at participating Monterey County lodging properties. The survey was distributed to all guests at participating properties over a two-week period during each quarter. Throughout each distribution week in 2017, 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. The following lodging properties participated in this research in 2017:



Portola Hotel & Spa. Digital image. www.PortolaHotel.com. Web.

- 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

ABOUT THIS REPORT

In the remainder of this report, data from the survey findings is presented as follows:

- The aggregate total is shown in the chart on the left
- On the right, a data table shows the findings broken out by type of visitor:
 1. Lodging Guests—Visitors who stayed overnight at a Monterey County hotel during their trip
 2. Visiting Friends and Relatives (VFRs)—Visitors who stayed overnight in a private residence of a friend or family member in Monterey County
 3. Day-trippers—Visitors who did not stay overnight anywhere in Monterey County

The data presented for ALL VISITORS in this report is weighted based the weighting plan outlined in the Research Methodology section of this report.

Key Definitions:

- 1. Travel Group** - Includes the number of people traveling together in the same group
- 2. Travel Party** – Number of people covered by reported in-market spending

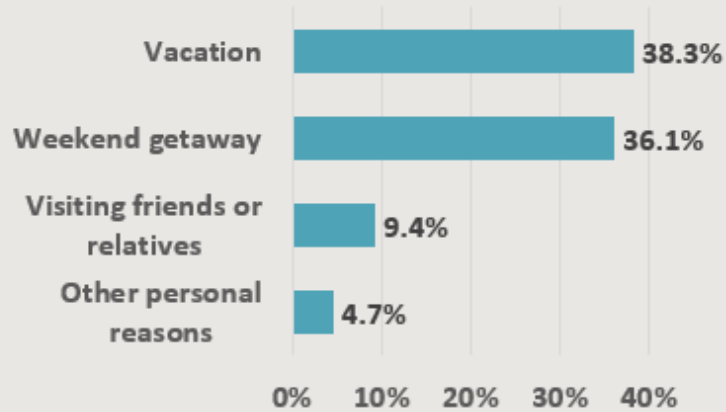
Visitor Segment Profiles

MONTEREY
Grab life by the moments:

2017 MONTEREY COUNTY VISITOR PROFILE

Top Reasons for Visiting

(See page 16 for full detail)



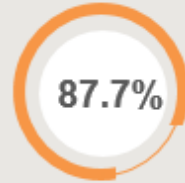
Past Visitation

(See page 22 for full detail)

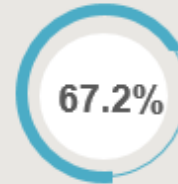


Top Activities

(See page 25 for full detail)



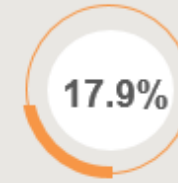
Dining in Restaurants



Shopping



Outdoor Recreation



Visit Friends/Family



Whale Watching



Nightlife/bars/clubs

Key Trip Details

(See pages 19, 20 and 26 for full detail)



The average visitor spends **2.8 days** in Monterey County



On average, visitors spend **\$455.47** in-market, per travel party, per day



The average visiting travel party consist of **3.3 people**

Domestic vs. International Visitors

(See page 47 for full detail)



THE HOTEL GUEST VISITOR



Visitors who stayed overnight in a hotel in Monterey County during their trip.



Hotel Stay Details

Mean hotel spend daily – \$256.59
Mean # of people in hotel room – 2.6



Top Methods of Arrival

- Personal or Rental Vehicle – 78.4%
- Airplane – 17.9% (including 5.8% who flew into the Monterey Regional Airport)
- Tour Bus – 1.6%



Top Monterey County Attractions Visited

- Cannery Row – 75.3%
- Old Fisherman's Wharf – 64.5%
- Monterey Bay Aquarium – 49.6%
- State Park/Beach – 41.3%
- 17-Mile Drive – 37.4%



Days Spent in Monterey County

Mean – 3.3 days

Average Daily Spending In-Market

Mean – \$613.07, per travel party



Top Activities Participated In

- Dining in Restaurants – 92.8%
- Shopping – 72.0%
- Outdoor Recreation – 37.7%
- Whale Watching – 21.8%
- Nightlife/bars/clubs – 17.2%



Mean Travel Party Size

- 3.1 people, on average
- 24.2% of travel parties had children

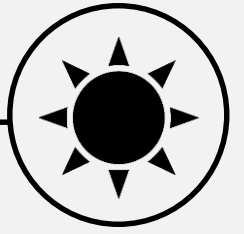


Key Demographics

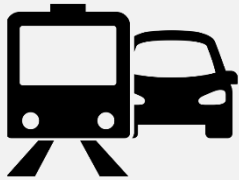
- Annual household income – \$140,798
- Married/Partnered – 71.3%
- Single – 17.8%
- Mean age – 47.7



THE DAY TRIP VISITOR



Visitors who did not stay overnight in Monterey County during their trip.



Top Methods of Arrival

- Personal or Rental Vehicle – 84.3%
- Tour Bus – 6.7%
- Airplane – 4.9% (including 1.7% who flew into the Monterey Regional Airport)



Top Monterey County Attractions Visited

- Cannery Row – 62.6%
- Old Fisherman's Wharf – 58.3%
- Monterey Bay Aquarium – 39.1%
- State Park/Beach – 26.5%
- 17-Mile Drive – 15.7%



Average Daily Spending In-Market

Mean – \$250.93, per travel party

Top Activities Participated In



- Dining in Restaurants – 84.3%
- Shopping – 60.4%
- Outdoor Recreation – 25.7%
- Visiting Friends/Family – 12.2%
- Whale Watching – 8.3%

Mean Travel Party Size

- 4.1 people, on average
- 26.4% of travel parties had children



Key Demographics

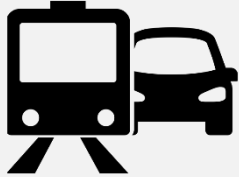
- Annual household income – \$94,134
- Married/Partnered – 51.3%
- Single – 17.8%
- Mean age – 43.1



THE INTERNATIONAL VISITOR



Visitors who reside outside the United States.



Top Methods of Arrival

- Personal or Rental Vehicle – 59.4%
- Airplane – 25.8% (including 6.1% who flew into the Monterey Regional Airport)
- Tour Bus – 8.7%



Days Spent in Monterey County

Mean – 3.5 days



Top Monterey County Attractions Visited

- Cannery Row – 69.2%
- Old Fisherman's Wharf – 68.6%
- Monterey Bay Aquarium – 54.1%
- 17-Mile Drive – 43.7%
- State Park/Beach – 38.0%



Average Daily Spending In-Market

Mean – \$535.89, per travel party

Top Activities Participated In

- Dining in Restaurants – 87.4%
- Shopping – 72.2%
- Whale Watching – 32.4%
- Outdoor Recreation – 30.4%
- Guided Tour – 15.3%



Mean Travel Party Size

- 3.2 people, on average
- 25.6% of travel parties had children

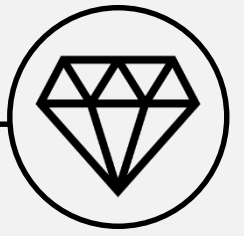


Key Demographics

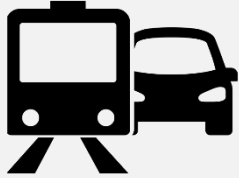
- Annual household income – \$103,262
- Married/Partnered – 65.3%
- Single – 24.5%
- Mean age – 42.3



THE AFFLUENT VISITOR



Visitors who reported having an annual household income over \$200,000.



Top Methods of Arrival

- Personal or Rental Vehicle – 75.9%
- Airplane – 20.5% (including 7.0% who flew into the Monterey Regional Airport)



Days Spent in Monterey County

Mean – 3.7 days



Top Monterey County Attractions Visited

- Cannery Row – 73.9%
- Old Fisherman's Wharf – 59.7%
- Monterey Bay Aquarium – 51.6%
- State Park/Beach – 47.6%
- 17-Mile Drive – 35.1%



Average Daily Spending In-Market

Mean – \$648.60, per travel party

Top Activities Participated In

- Dining in Restaurants – 96.9%
- Shopping – 76.1%
- Outdoor Recreation – 39.6%
- Whale Watching – 20.8%
- Visiting Friends/Family – 20.6%



Mean Travel Party Size

- 3.0 people, on average
- 20.4% of travel parties had children



Key Demographics

- Annual household income – \$235,228
- Married/Partnered – 87.1%
- Single – 10.5%
- Mean age – 50.7



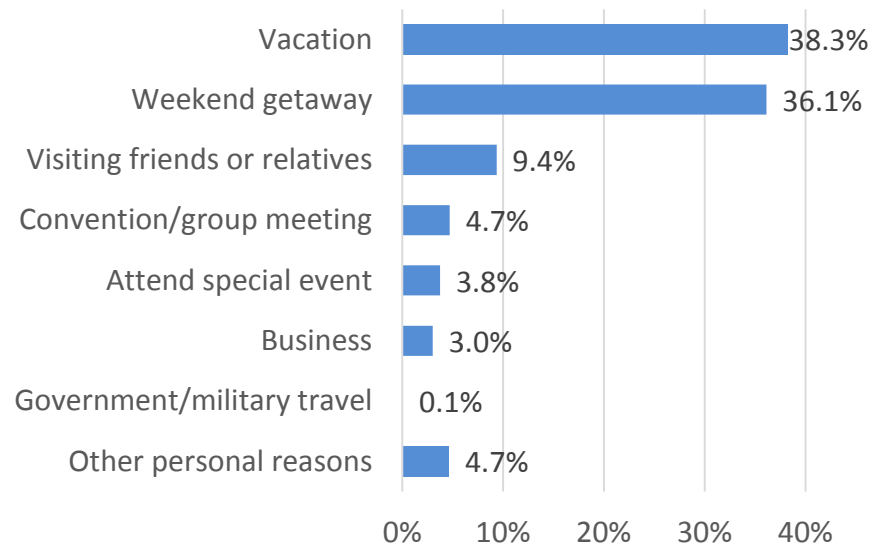
Detailed Findings

MONTEREY
Grab life by the moments:

Primary Reason for Monterey County Trip

Monterey County visitors traveled to the destination primarily for leisure purposes (74.4%). This includes visitors who came to the area for a vacation (38.3%) or a weekend getaway (36.1%). Another 9.4 percent of visitors were in Monterey County to visit friends or relatives and 7.8 percent were there for business, convention/group or government travel. When looking at purpose of trip by visitor type, Lodging guests made up the largest share of visitors who were in the area on a vacation (45.7%), while Day-trippers were more likely to be in Monterey County on a weekend getaway (43.6%) compared to the other segments.

Figure 1: Primary Reason for Monterey County Trip



Question: What is your primary reason for visiting Monterey County?

Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Vacation	45.7%	23.7%	27.6%
Weekend getaway	33.9%	22.4%	43.6%
Visiting friends or relatives	4.0%	42.1%	9.3%
Convention/group meeting	7.0%	0.0%	3.1%
Attend special event	4.3%	3.9%	3.6%
Business	3.0%	3.9%	3.6%
Government/military travel	0.0%	0.0%	0.0%
Other personal reasons	2.1%	3.9%	9.3%
Sample size:	628	83	246

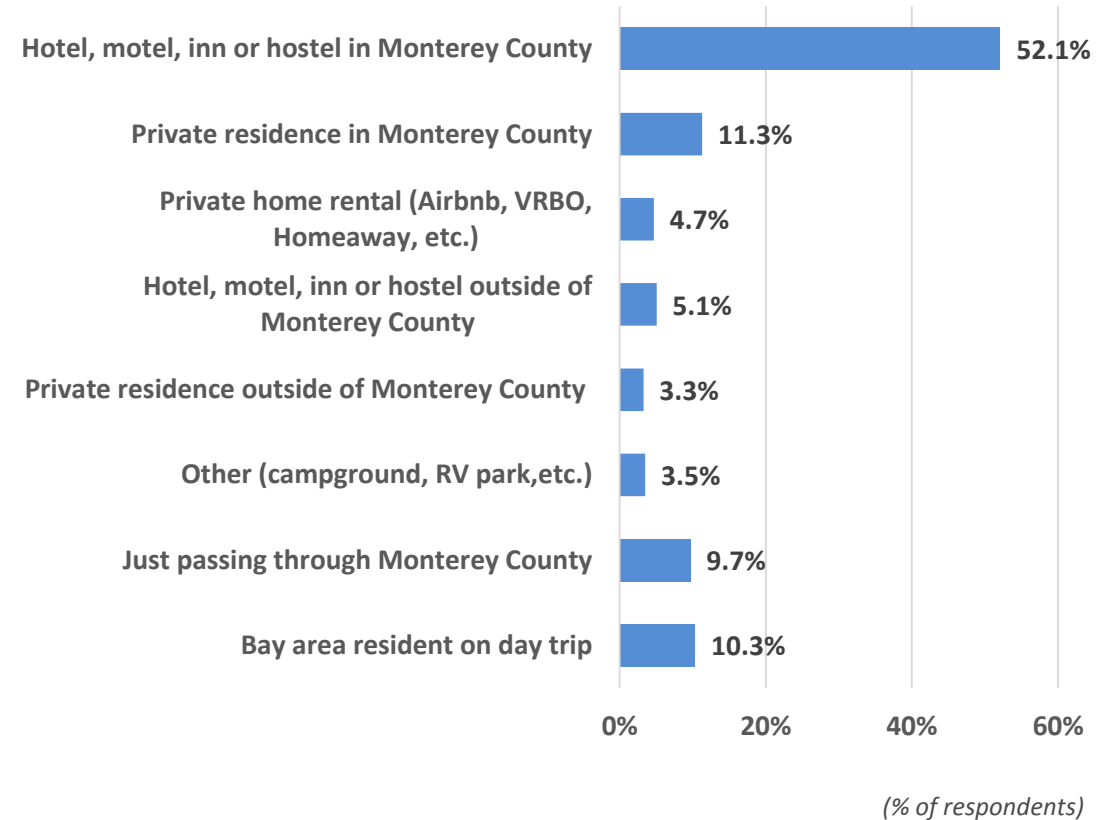
Base: All respondents. 1,066 completed surveys.

Place of Stay

Commercial lodging in Monterey County was the most common place of stay amongst visitors surveyed. Over half of all visitors stayed in a Monterey County hotel, motel, inn or hostel during their visit (52.1%), while 11.3 percent percent stayed in a private residence and 4.7 percent stayed in private home rental. Day-trippers—including those who stayed in paid or private accommodations outside Monterey County, just passing through and Bay Area residents on leisure day trips—represented 28.4 percent of visitors surveyed.

Question: Where are you staying on this trip to Monterey? (Select one) Base: All respondents. 1,066 completed surveys.

Figure 2: Place of Stay

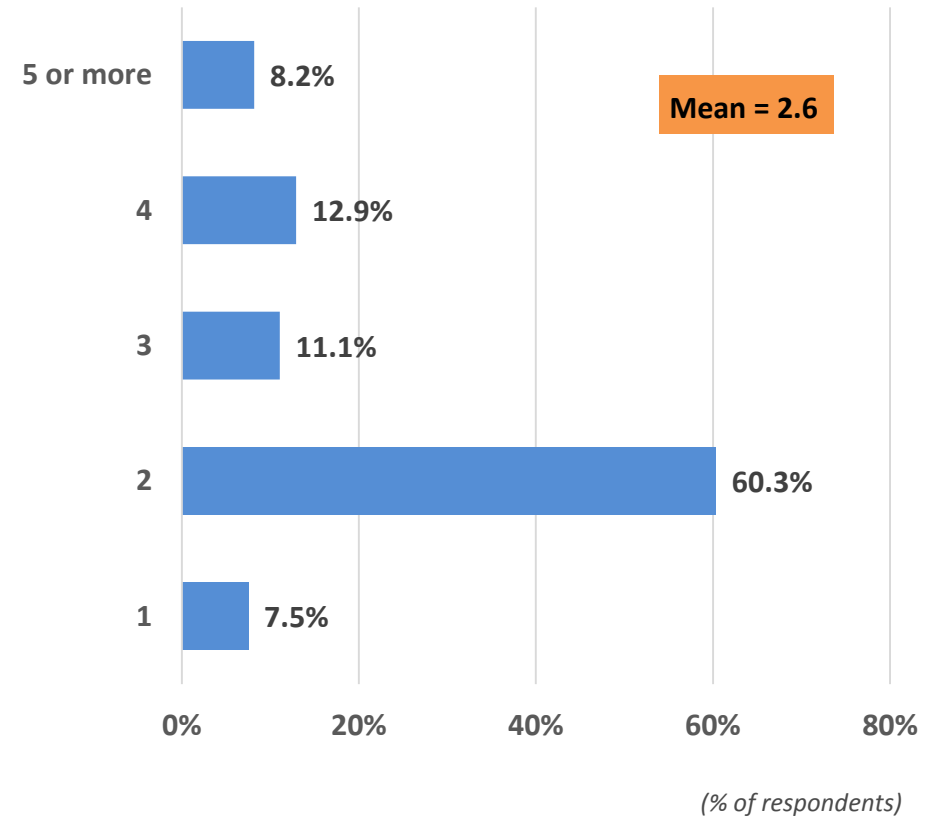


Number of People in Hotel Room/Home Rental

The average Monterey County visitor who stayed overnight in paid accommodations had 2.6 occupants in their room or rental. Monterey County visitors who stayed in a hotel, motel, inn or private home rental were asked how many people, including themselves, stayed in their room or rental property. Over 60 percent of these overnight visitors stayed with just one other person (60.3%).

Question: Including yourself, how many people stayed in your hotel room/private home rental? Base: Respondents staying overnight in a hotel or private home rental. 598 completed surveys.

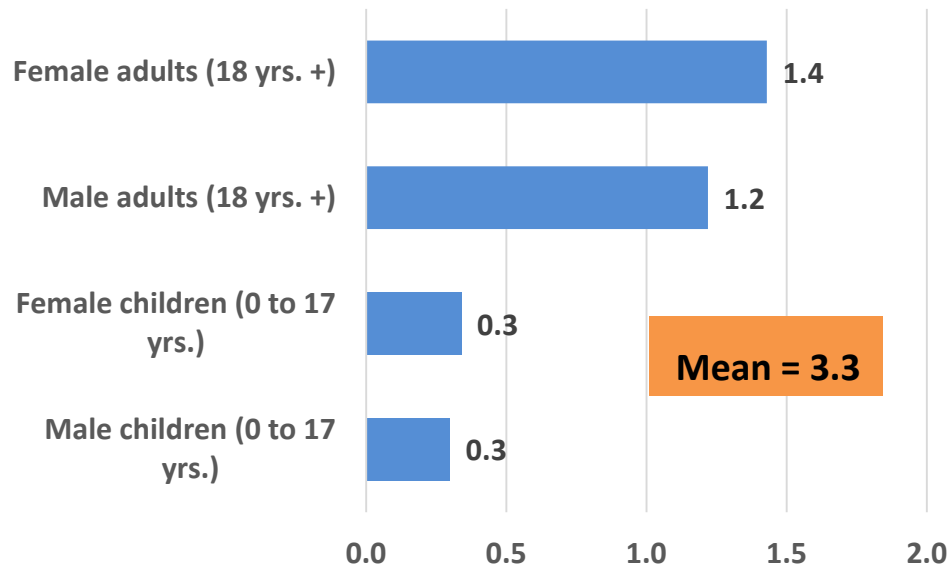
Figure 3: Number of People in Hotel Room/Home Rental



Travel Group Composition

The typical travel group to Monterey County was comprised of 3.3 persons. The average travel group surveyed included 1.4 adult females and 1.2 adult males. In addition, one-quarter of all travel groups included children under age 18 (24.9%). When looking at the differences between visitor types, day-trippers had the largest travel group (4.1 persons) and the largest share of travel groups with children (26.4%).

Figure 4: Travel Group Composition



Question: How many people of each type were in your immediate traveling party, including yourself?

Detail by Type of Visitor

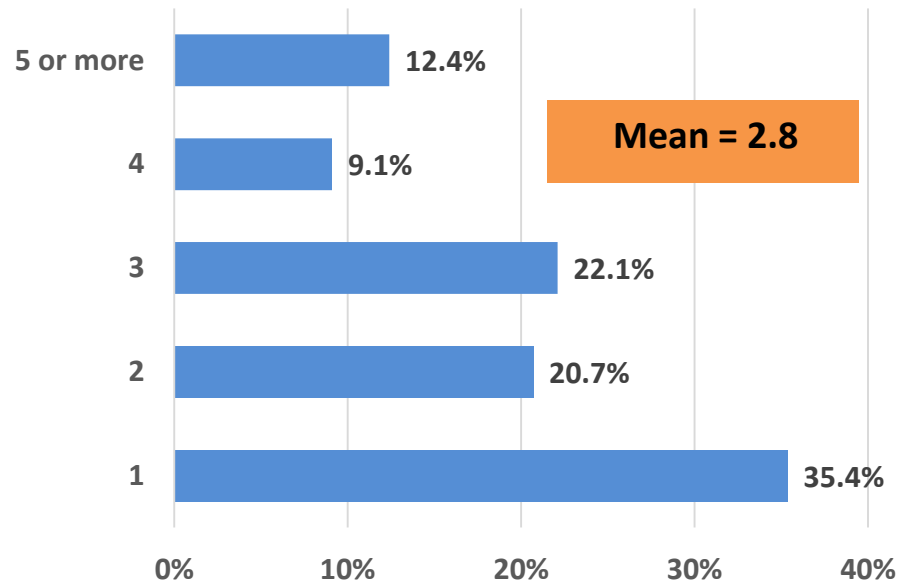
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Female adults (18 yrs. +)	1.4	1.1	1.7
Male adults (18 yrs. +)	1.2	1.0	1.4
Female children (0 to 17 yrs.)	0.3	0.3	0.6
Male children (0 to 17 yrs.)	0.3	0.3	0.5
Travel Group Mean	3.1	2.7	4.1
Travel Groups with Children	24.2%	24.7%	26.4%
Sample size:	628	83	246

Base: All respondents. 1,066 completed surveys.

Days in Monterey County

The average length of stay for Monterey County visitors was 2.8 days. Visitors staying in private homes (VFRs) in the county had the longest length of stay with an average of 4.5 days. Lodging guests in Monterey County spent an average of 3.2 days in the area on their trip.

Figure 5: Days in Monterey County



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
5 or more	13.3%	28.9%	--
4	13.0%	11.8%	--
3	31.5%	36.8%	--
2	32.0%	10.5%	--
1	9.4%	11.8%	100%
Mean	3.2	4.5	1.0
Sample Size:	615	83	246

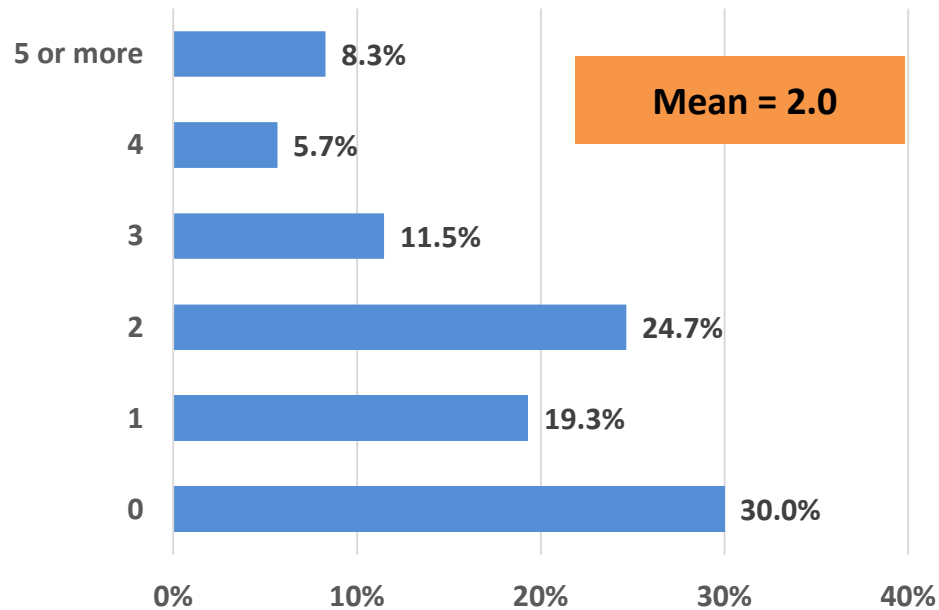
Question: How many total days and nights did you stay in Monterey County?

Base: All respondents. 1,059 completed surveys.

Nights in Monterey County

The average Monterey County visitor surveyed spent 2.0 nights in the area during their trip. Visitors staying in private homes (VFRs) in the county had the longest length of stay with an average of 3.8 nights, while lodging guests spent an average of 2.5 nights in Monterey County.

Figure 6: Nights in Monterey County



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
5 or more	8.4%	21.1%	--
4	7.3%	11.8%	--
3	16.2%	13.2%	--
2	36.3%	34.2%	--
1	30.2%	9.2%	--
0	1.6%	10.5%	100.0%
Mean	2.5	3.8	0.0
Sample size:	615	83	246

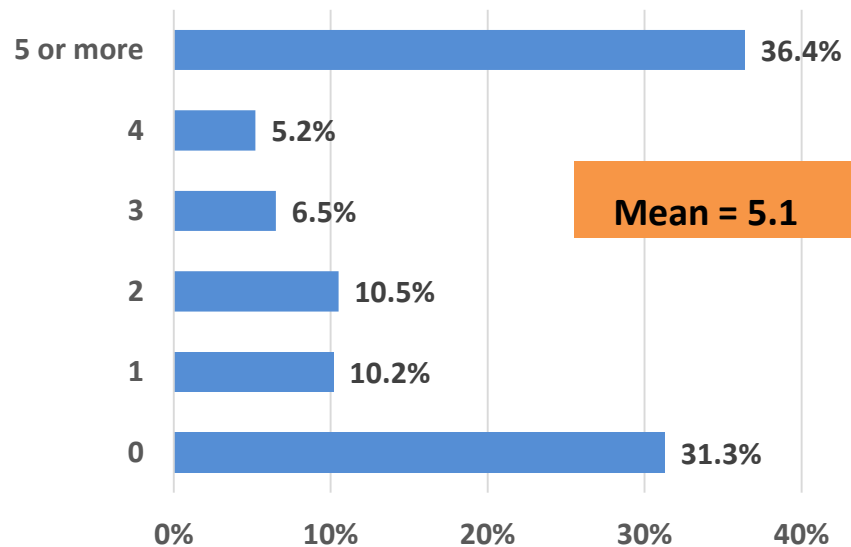
Question: How many total days and nights did you stay in Monterey County?

Base: All respondents. 1,059 completed surveys.

Past Visitation to Monterey County

Monterey County attracts a substantial number of repeat visitors. Over two-thirds of visitors surveyed had previously taken a trip to Monterey County (68.7%) while 31.3 percent were first-time visitors to the area. The average visitor has been to Monterey County 5.1 times prior to their most recent visit. Those visiting friends and relatives reported the highest number of previous visits (7.4 times on average) compared to the other visitor segments. Lodging guests were the likeliest visitor segment to be first-time visitors (31.0%).

Figure 7: Past Visitation to Monterey County



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
5 or more	34.3%	49.2%	38.6%
4	4.6%	6.2%	7.1%
3	6.9%	3.1%	5.4%
2	10.7%	12.3%	11.4%
1	12.5%	6.2%	7.1%
0	31.0%	23.1%	30.4%
Mean	4.6	7.4	5.4
Sample Size:	603	79	223

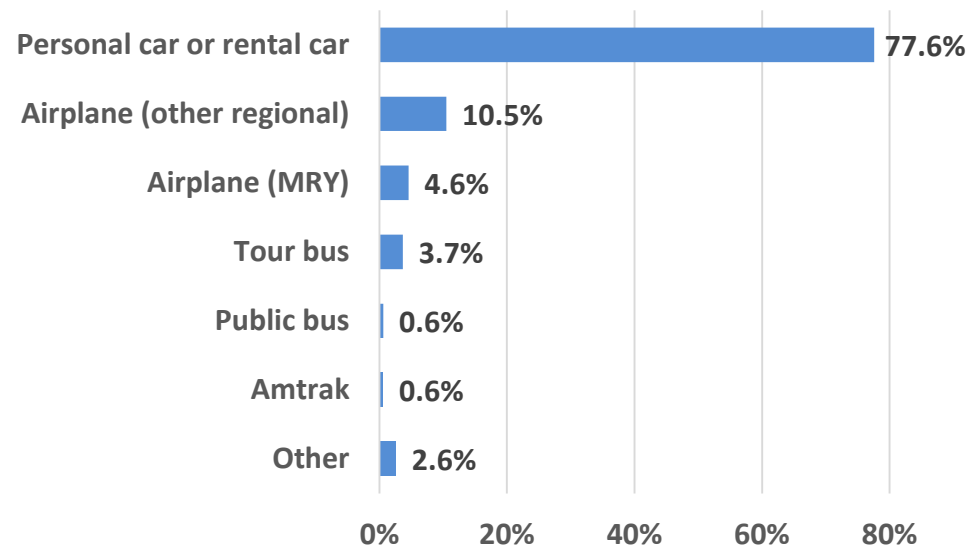
Question: Prior to this visit, how many times have you been to Monterey County?

Base: All respondents. 1,008 completed surveys.

Method of Arrival

While a variety of transportation options were used to arrive into Monterey County, automobile was the most common method of arrival (77.6%). Additionally, over 15 percent of visitors arrived into the area by airplane (15.1%), including 4.6 percent who flew into the Monterey Regional (MRY) Airport.

Figure 8: Method of Arrival



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Personal car or rental car	78.4%	63.6%	84.3%
Airplane (other regional)	12.1%	22.1%	3.6%
Airplane (MRY)	5.8%	10.4%	1.3%
Tour bus	1.6%	0.0%	6.7%
Public bus	0.4%	1.3%	0.9%
Amtrak	0.2%	2.6%	0.4%
Other	1.6%	0.0%	2.7%
Sample size:	628	83	246

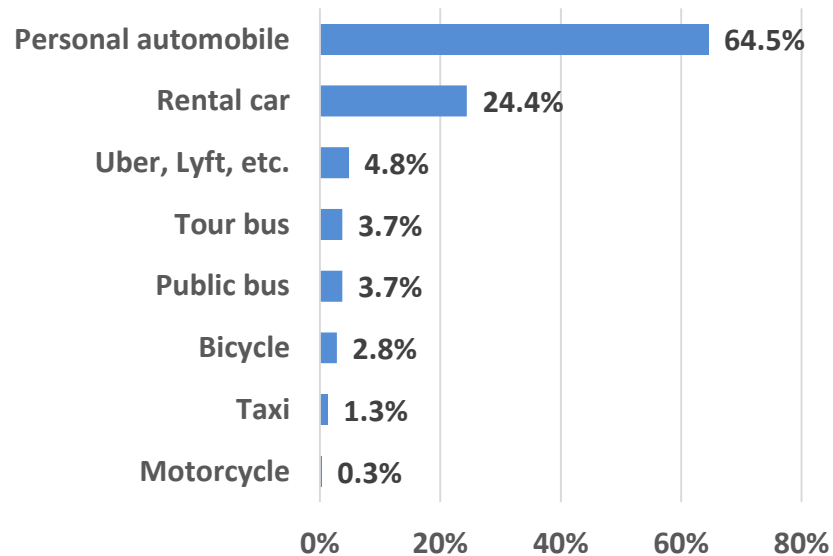
Question: How did you arrive in the Monterey County area? (Select one)

Base: All respondents. 1,066 completed surveys.

Transportation Used In-Market

Driving a personal or rental car was the most utilized form of transportation used while in Monterey County. In total, nearly two-thirds used a personal automobile to get around the County (64.2%) and one-quarter used a rental car (24.4%--up from 18.4% in 2016). Additionally, 4.8 percent used a ride sharing service such as Uber or Lyft (up from 2.8% in 2016) and 1.3 percent used a taxi.

Figure 9: Transportation Used In-Market



Question: Which modes of transportation did you use while in Monterey County? (Select all that apply)

Detail by Type of Visitor

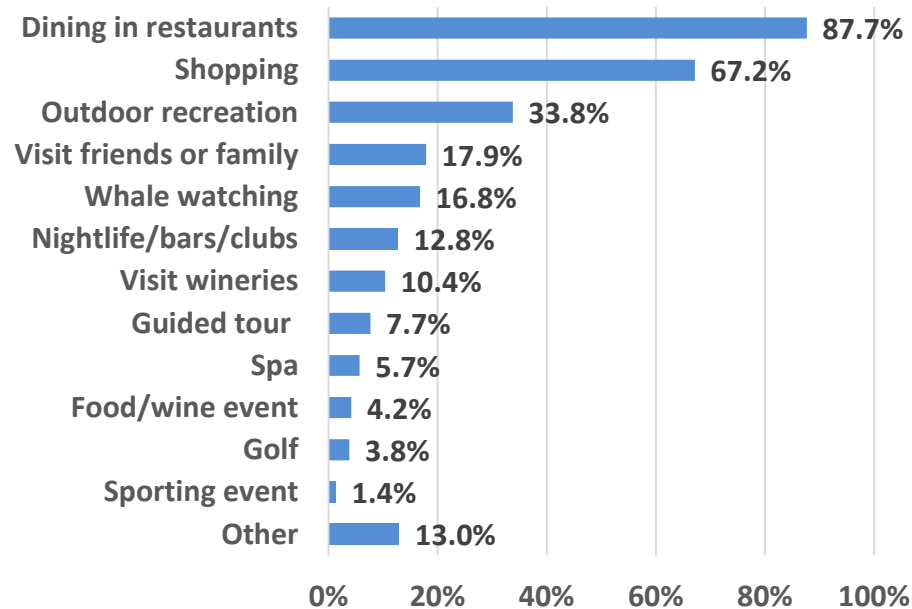
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Personal automobile	58.5%	74.0%	74.8%
Rental car	31.7%	18.2%	14.3%
Tour bus	6.0%	5.2%	2.2%
Uber, Lyft, etc.	2.6%	0.0%	5.2%
Public bus	3.6%	5.2%	3.5%
Bicycle	3.4%	3.9%	0.9%
Taxi	1.7%	1.3%	0.4%
Motorcycle	0.2%	0.0%	0.4%
Sample size:	628	83	246

Base: All respondents. 1,066 completed surveys.

Activities in Monterey County

Visitors most commonly dined in restaurants and shopped while in Monterey County. Of the activities tested, dining in restaurants (87.7%) and shopping (67.2%--up from 62.8% in 2016) were the top activities visitors participated in while in Monterey County. Additionally, one-third of visitors participated in activities related to outdoor recreation (33.8%).

Figure 10: Activities in Monterey County



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Dining in restaurants	92.8%	85.7%	84.3%
Shopping	72.0%	67.5%	60.4%
Outdoor recreation	37.7%	36.4%	25.7%
Visit friends or family	21.8%	15.6%	8.3%
Whale watching	14.2%	62.3%	12.2%
Nightlife/bars/clubs	17.2%	14.3%	4.8%
Visit wineries	14.6%	10.4%	2.2%
Guided tour	9.6%	5.2%	5.2%
Spa	8.7%	2.6%	1.7%
Food/Wine event	5.1%	2.6%	2.6%
Golf	5.7%	3.9%	0.4%
Sporting event	5.7%	3.9%	0.4%
Other	2.1%	2.6%	0.0%
Sample size:	628	83	246

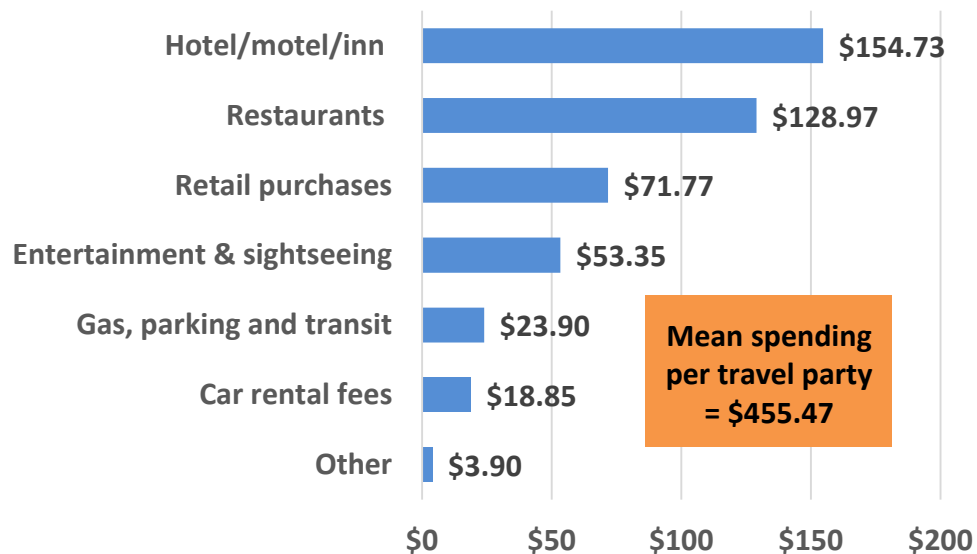
Question: Which of these activities did you participate in while in Monterey County? (Select all that apply)

Base: All respondents. 1,066 completed surveys.

Spending Per Day, Per Travel Party

In 2017, visiting travel parties spent an average of \$455.47 in Monterey County per day. This is up from \$432.54 in 2016. The largest share of this spending is attributed to accommodations (\$154.73—note: this is the average lodging spend across all visitors including those who did not stay in paid accommodations) and restaurants (\$128.97). Retail store purchases (\$71.77) and entertainment (\$53.35) were also top expenditures. Lodging guests spent an average of \$256.59 on their accommodations in Monterey County, up from \$221.64 in 2016.

Figure 11: Spending Per Day, Per Travel Party



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Hotel/motel/inn	\$256.59	\$30.83	--
Restaurants	\$160.18	\$102.20	\$93.18
Retail purchases	\$85.73	\$39.45	\$66.98
Entertainment & sightseeing	\$54.43	\$59.88	\$56.08
Gas, parking and transit	\$26.43	\$13.47	\$22.22
Car rental fees	\$27.46	\$10.58	\$8.10
Other	\$2.26	\$8.96	\$4.38
Mean spending per day, per travel party	\$613.07	\$265.37	\$250.93
Sample size:	604	79	224

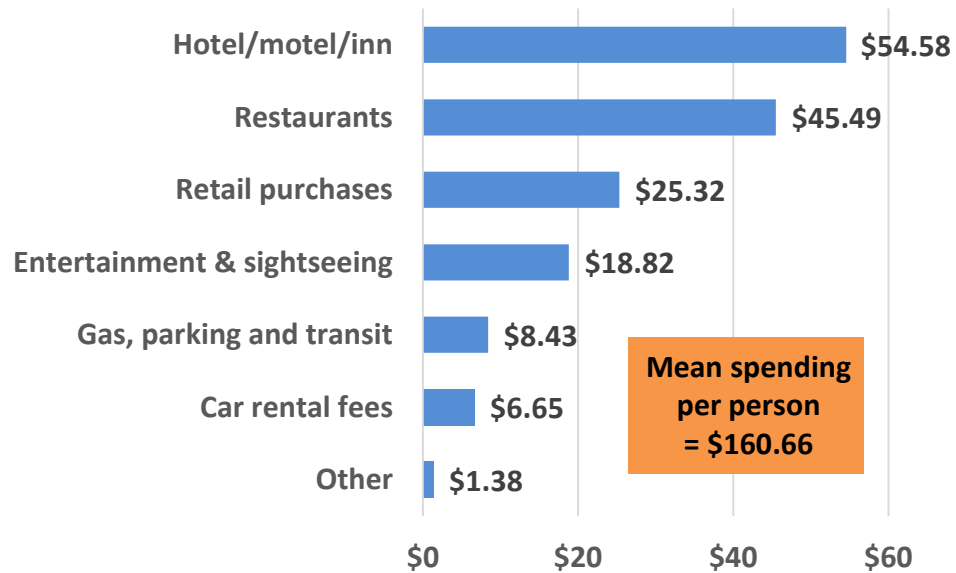
Question: PER DAY, approximately how much did you spend on each of the following while Monterey County?

Base: All respondents. 1,011 completed surveys.

Spending Per Day, Per Person

It is estimated that the average Monterey County visitor represents \$160.66 in daily spending in the county. This is based on the reported daily spending of \$455.47 covering an average of 2.8 travelers.

Figure 12: Spending Per Day, Per Person



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Hotel/motel/inn	\$90.10	\$11.85	--
Restaurants	\$56.24	\$39.26	\$32.58
Retail purchases	\$30.10	\$15.16	\$23.42
Entertainment & sightseeing	\$19.11	\$23.00	\$19.61
Gas, parking and transit	\$9.28	\$5.17	\$7.77
Car rental fees	\$9.64	\$4.06	\$2.83
Other	\$0.79	\$3.44	\$1.53
Mean spending per day, per person	\$215.27	\$101.95	\$87.74
Mean travelers covered by spending	2.8	2.6	2.9
Sample size:	604	79	224

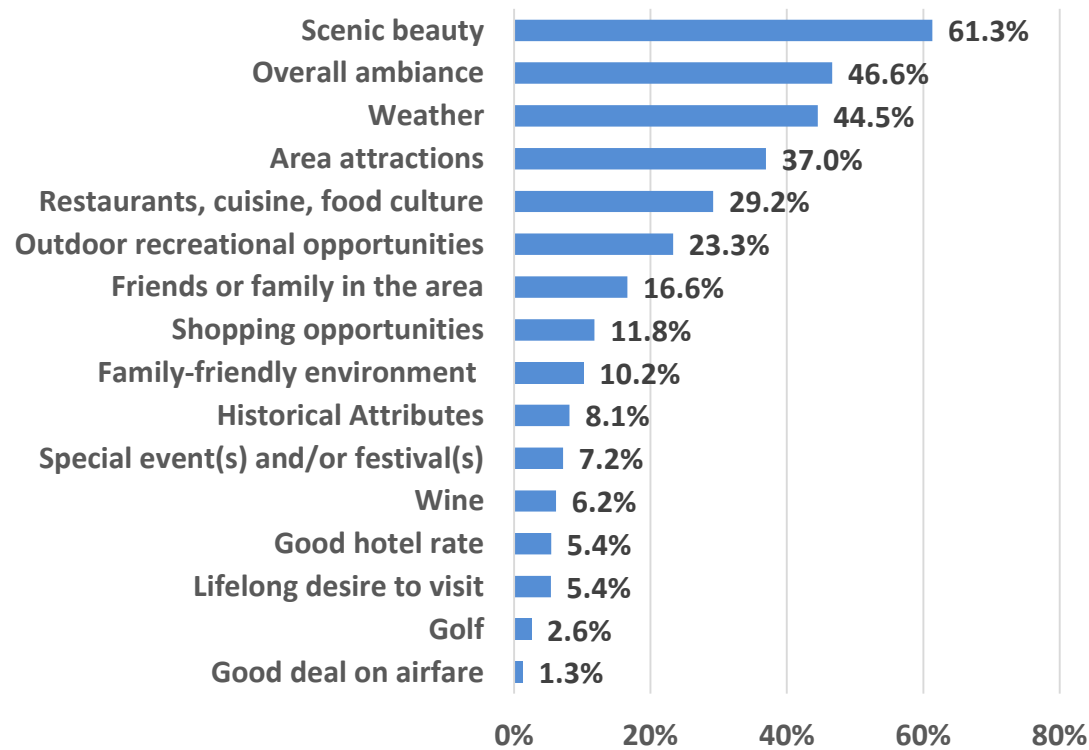
Question: These expenses fully covered how many people (including yourself)?

Base: All respondents. 1,011 completed surveys.

Important Factors to Destination Decision (Aided)

Scenic beauty (61.3%), overall ambiance (46.6%) and weather (44.5%) were the most important factors motivating visitors take a trip to Monterey County. Other top factors important to visitors' decision to travel the county include area attractions (37.0%) and restaurants/food culture (29.2%).

Figure 13: Important Factors to Destination Decision



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Scenic beauty	67.2%	53.2%	53.5%
Overall ambiance	53.2%	46.8%	38.7%
Weather	49.1%	31.2%	42.6%
Area attractions	41.0%	16.9%	38.7%
Restaurants, cuisine, food culture	32.9%	26.0%	25.7%
Outdoor recreational opportunities	26.9%	23.4%	13.5%
Friends or family in the area	12.0%	62.3%	12.6%
Shopping opportunities	12.5%	13.0%	9.1%
Family-friendly environment	12.7%	6.5%	8.7%
Historical attributes	11.3%	2.6%	5.7%
Special event(s) and/or festival(s)	8.1%	1.3%	3.0%
Wine	7.5%	7.8%	6.5%
Good hotel rate	10.5%	0.0%	0.4%
Lifelong desire to visit	5.7%	5.2%	6.5%
Golf	3.9%	1.3%	0.4%
Good deal on airfare	2.4%	0.0%	0.4%
Sample size:	628	83	246

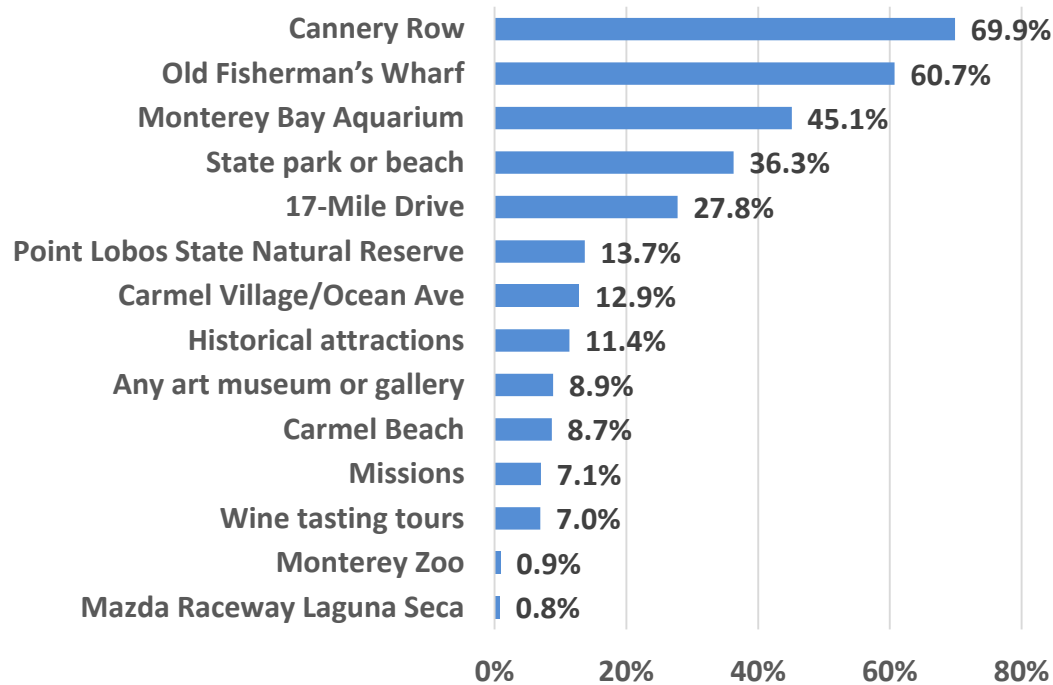
Question: Which of the following were IMPORTANT to your decision to take this trip to Monterey County? (Select all that apply)

Base: All respondents. 1,066 completed surveys.

Attractions Visited

Of the attractions tested, the top visited sites were Cannery Row (69.9%), followed by Old Fisherman’s Wharf (60.7%). Presented with a list of fourteen Monterey County attractions, respondents identified those which they visited during their trip to the County. Following Cannery Row and Old Fisherman’s Wharf, the next most visited attractions were Monterey Bay Aquarium (45.1%), state parks or beaches (36.3%) and 17-Mile Drive (27.8%).

Figure 14: Attractions Visited



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Cannery Row	75.3%	74.0%	62.6%
Old Fisherman’s Wharf	64.5%	70.1%	58.3%
Monterey Bay Aquarium	49.6%	40.3%	39.1%
State park or beach	41.3%	37.7%	26.5%
17-Mile Drive	37.4%	16.9%	15.7%
Point Lobos State Natural Reserve	16.1%	20.8%	7.8%
Carmel Village/Ocean Ave	15.4%	10.4%	7.4%
Historical attractions	13.4%	11.7%	10.0%
Any art museum or gallery	11.8%	13.0%	3.5%
Carmel Beach	11.1%	6.5%	4.3%
Missions	9.4%	5.2%	2.6%
Wine tasting tours	8.2%	10.4%	4.8%
Monterey Zoo	1.0%	2.6%	0.4%
Mazda Raceway Laguna Seca	0.5%	3.9%	0.0%
Sample size:	628	83	246

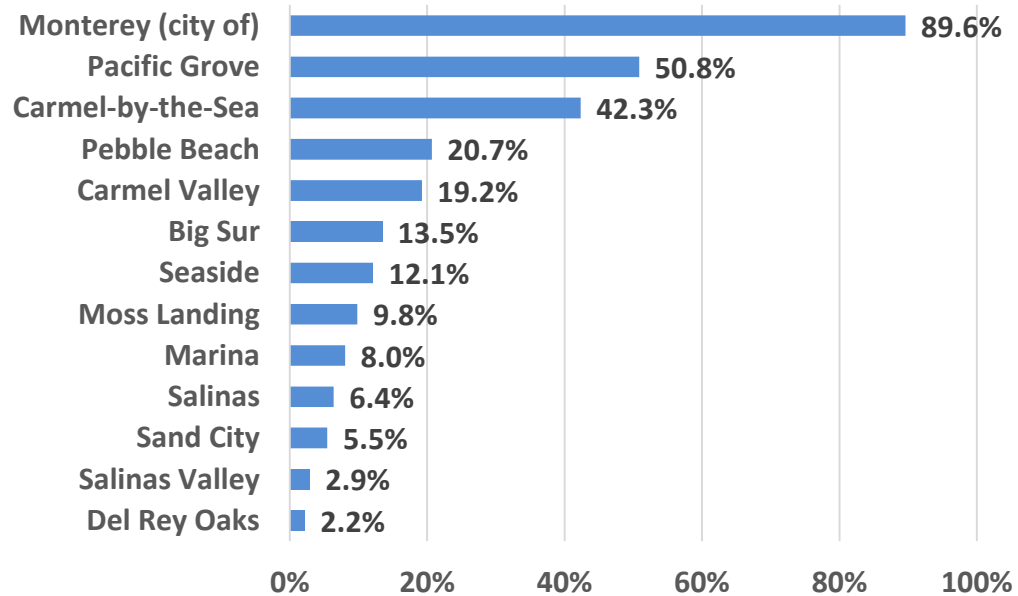
Question: Which of the following attractions did you visit while on this trip? (Select all that apply)

Base: All respondents. 1,066 completed surveys.

Monterey County Areas Visited

During their trip to Monterey County, nine-in-ten visitors stated they went to the city of Monterey (89.6%). Visitors were presented with a list of areas and asked which they visited as part of their Monterey County trip. In addition to the city of Monterey, Pacific Grove (50.8%) and Carmel-by-the-Sea (42.3%) were also reported as top areas visited in the County.

Figure 15: Monterey County Areas Visited



Question: Which of these Monterey County areas did you visit on this trip? (Select all that apply)

Detail by Type of Visitor

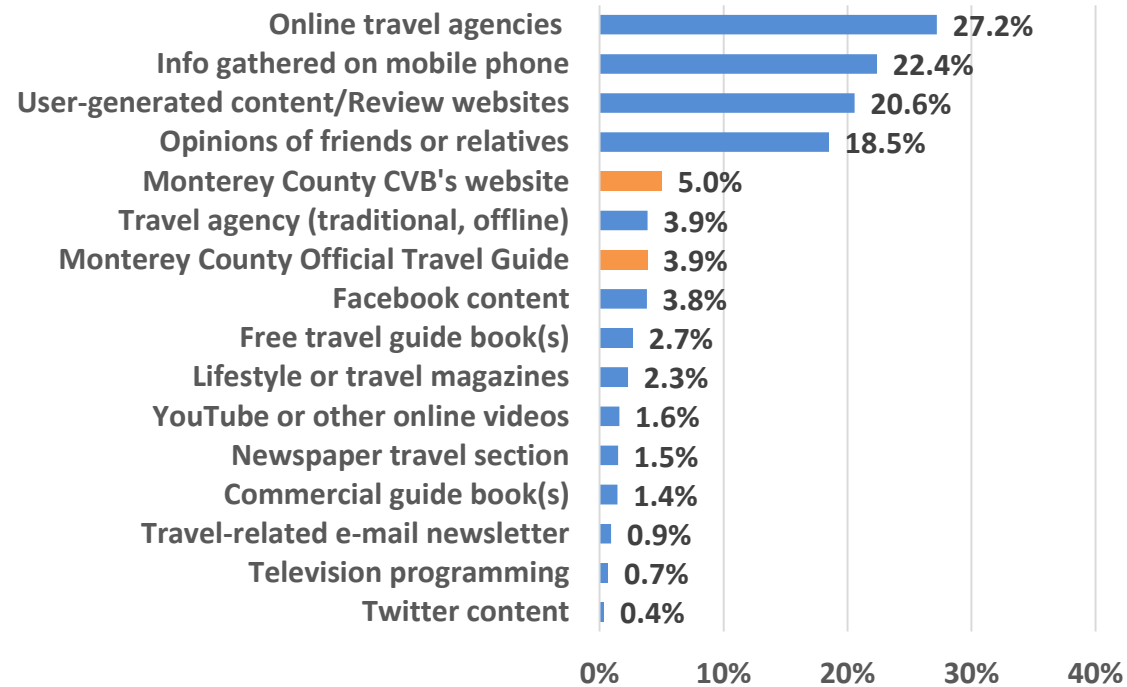
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Monterey (city of)	90.1%	97.4%	87.0%
Pacific Grove	58.8%	49.4%	30.4%
Carmel-by-the-Sea	51.8%	44.2%	28.0%
Pebble Beach	28.5%	10.4%	10.4%
Carmel Valley	22.3%	28.6%	10.0%
Big Sur	18.5%	6.5%	7.0%
Seaside	13.6%	20.8%	4.3%
Moss Landing	10.6%	11.7%	6.5%
Marina	8.4%	18.2%	4.3%
Salinas	6.5%	16.9%	2.6%
Sand City	6.7%	7.8%	2.6%
Salinas Valley	3.3%	6.5%	1.3%
Del Rey Oaks	2.6%	5.2%	0.0%
Sample size:	628	83	246

Base: All respondents. 1,066 completed surveys.

Travel Planning Resources Used Before Arrival

Before arriving in Monterey County, visitors cited online travel agencies as the most utilized resource used to plan their trip (27.2%) followed by information gathered on a mobile phone (22.4%), user-generated content (20.6%) and opinions of friends/relatives (18.5%). Additionally, 5.0 percent reported using SeeMonterey.com to plan their trip to the area before arrival (up from 3.6% in 2016) and 3.9 percent also reported using the Monterey County official Travel Guide (similar to findings in 2016 at 3.1%).

Figure 16: Travel Planning Resources Used Before Arrival



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?

Detail by Type of Visitor

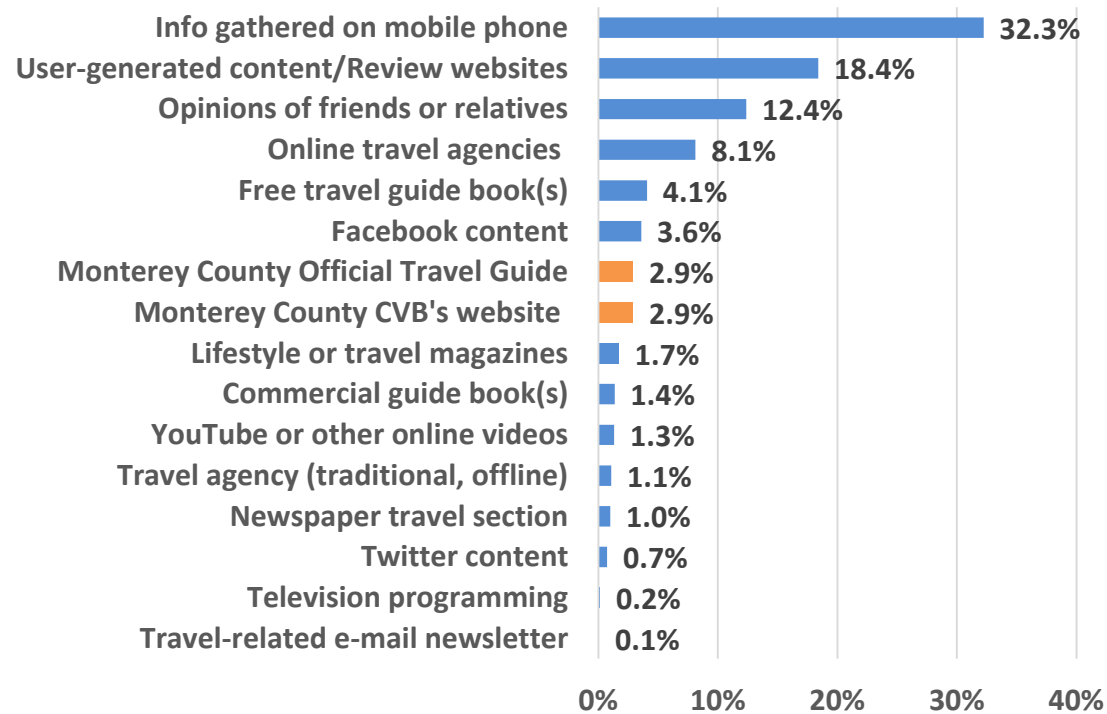
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Online travel agencies	40.3%	14.3%	11.3%
Info gathered on mobile phone	22.5%	26.0%	26.5%
User-generated content/Review websites	25.9%	18.2%	13.0%
Opinions of friends or relatives	17.8%	33.8%	17.4%
Monterey County CVB's website	7.0%	5.2%	1.7%
Travel agency (traditional, offline)	5.7%	3.9%	1.3%
Monterey County Official Travel Guide	4.3%	5.2%	2.6%
Facebook content	4.8%	5.2%	2.6%
Free travel guide book(s)	3.9%	0.0%	1.7%
Lifestyle or travel magazines	2.6%	3.9%	0.4%
YouTube or other online videos	2.2%	2.6%	0.0%
Newspaper travel section	1.4%	3.9%	0.9%
Commercial guide book(s)	2.9%	0.0%	0.0%
Travel-related e-mail newsletter	1.9%	0.0%	0.0%
Television programming	0.9%	1.3%	0.4%
Twitter content	0.5%	0.0%	0.4%
Sample size:	628	83	246

Base: All respondents. 1,066 completed surveys.

Travel Planning Resources Used In-Market

Overall use of trip planning resources typically decreases once visitors are in the destination. Utilizing information gathered on a mobile phone for trip planning increased once visitors were in-market (32.3% vs 22.4% pre-trip). Visitors most often continue to turn to user generated content/review sites (18.4%), opinions of friends/relatives (12.4%) and online travel agencies (8.1%), although to a lesser degree compared to pre-arrival usage. In total, 2.9 percent of visitors used SeeMonterey.com and 2.9 percent used the Monterey County Travel Guide to help plan their trip while in the destination.

Figure 17: Travel Planning Resources Used In-Market



Detail by Type of Visitor

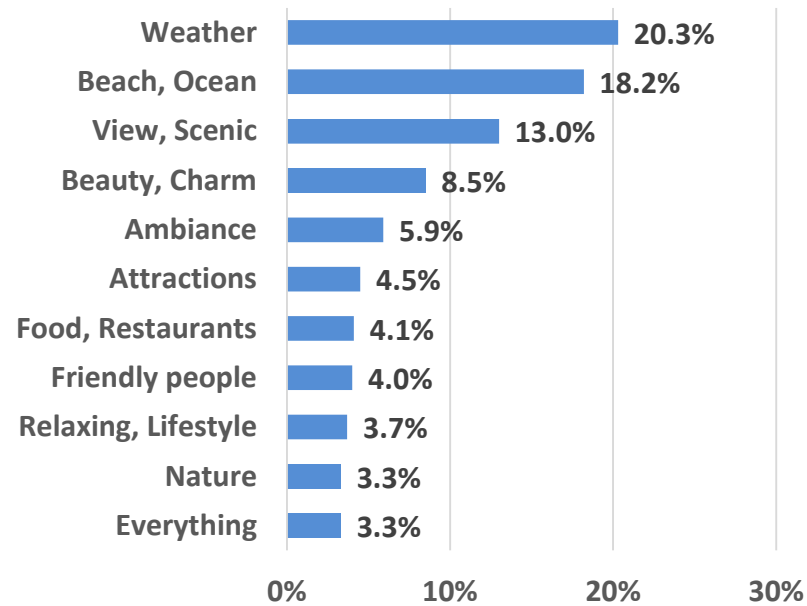
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Info gathered on mobile phone	34.8%	31.2%	29.6%
User-generated content/Review websites	25.0%	15.6%	10.0%
Opinions of friends or relatives	9.9%	36.4%	11.7%
Online travel agencies	12.0%	7.8%	3.0%
Free travel guide book(s)	6.0%	1.3%	2.2%
Facebook content	4.5%	7.8%	2.2%
Monterey County Official Travel Guide	4.8%	2.6%	0.4%
Monterey County CVB's website	4.5%	1.3%	1.3%
Lifestyle or travel magazines	1.9%	5.2%	0.4%
Commercial guide book(s)	2.2%	1.3%	0.0%
YouTube or other online videos	1.9%	2.6%	0.0%
Travel agency (traditional, offline)	1.9%	0.0%	0.4%
Newspaper travel section	1.9%	0.0%	0.4%
Twitter content	1.2%	1.3%	0.9%
Television programming	1.0%	0.0%	0.9%
Travel-related e-mail newsletter	0.3%	0.0%	0.0%
Sample size:	628	83	246

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: All respondents. 1,066 completed surveys.

Most Liked Aspects of Monterey County (Unaided)

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 cited responses are shown in the chart and table below. Amongst these, the area's weather (20.3%), beach/ocean (18.2%), view/scenery (13.0%) and beauty/charm (8.5%) were listed most often.

Figure 18: Most Liked Aspects of Monterey County (Unaided)



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Weather	19.3%	12.0%	22.4%
Beach, Ocean	17.8%	24.0%	17.0%
View, Scenic	13.2%	14.7%	12.6%
Beauty, Charm	9.1%	5.3%	7.2%
Ambiance	6.6%	4.0%	7.2%
Attractions	4.5%	2.7%	6.3%
Food, Restaurants	4.1%	2.7%	4.9%
Friendly people	2.1%	9.3%	5.4%
Relaxing, Lifestyle	4.5%	6.7%	2.2%
Nature	3.2%	5.3%	2.7%
Everything	3.2%	4.0%	3.1%
Sample size:	561	75	223

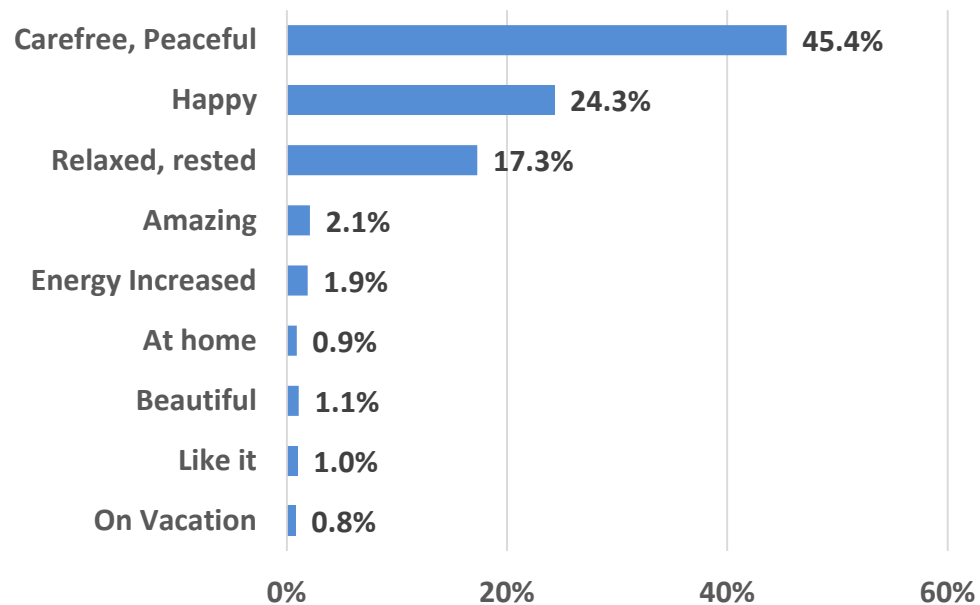
Question: What do you like most about Monterey County?

Base: All respondents. 965 completed surveys.

Feeling in Monterey County (Unaided)

Being in Monterey County makes visitors feel “carefree” and “peaceful.” In an open-ended question, respondents were asked to state how they feel when in Monterey County. Nearly half of all visitors surveyed reported feeling carefree and at peace (45.4%). The other top emotions visitors have while in Monterey County are “happy” (24.3%) and “relaxed” (17.3%--up from 4.7% in 2016).

Figure 20: Feeling in Monterey County (Unaided)



Question: In a few words, how do you feel when you are in Monterey County?

Detail by Type of Visitor

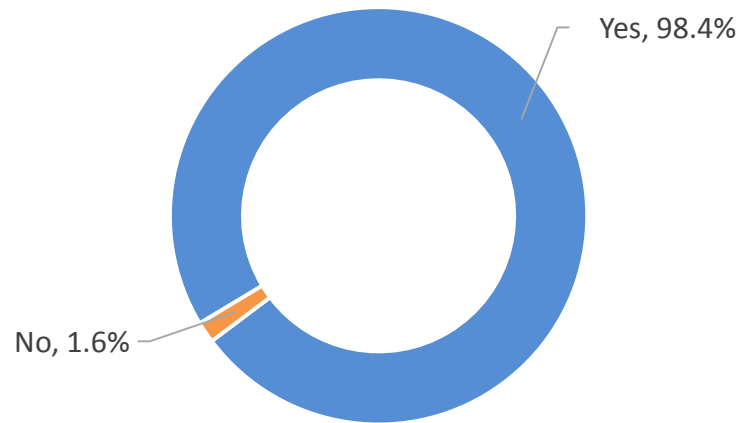
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Carefree, Peaceful	50.0%	35.1%	40.3%
Happy	21.2%	37.8%	25.5%
Relaxed, rested	16.7%	16.2%	20.8%
Amazing	2.0%	4.1%	1.4%
Energy Increased	1.1%	1.4%	3.7%
At home	1.6%	0.0%	0.0%
Beautiful	1.3%	0.0%	0.9%
Like it	0.9%	0.0%	0.9%
On Vacation	1.1%	0.0%	0.0%
Sample size:	597	78	221

Base: All respondents. 999 completed surveys.

Return to Monterey County

Visitors reported a high likelihood to return to Monterey County in the future. Nearly all visitors surveyed, 98.4 percent, reported that they would return to Monterey County.

Figure 21: Return to Monterey County



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Yes	98.6%	100.0%	96.9%
No	1.4%	0.0%	3.1%
Sample size:	626	82	232

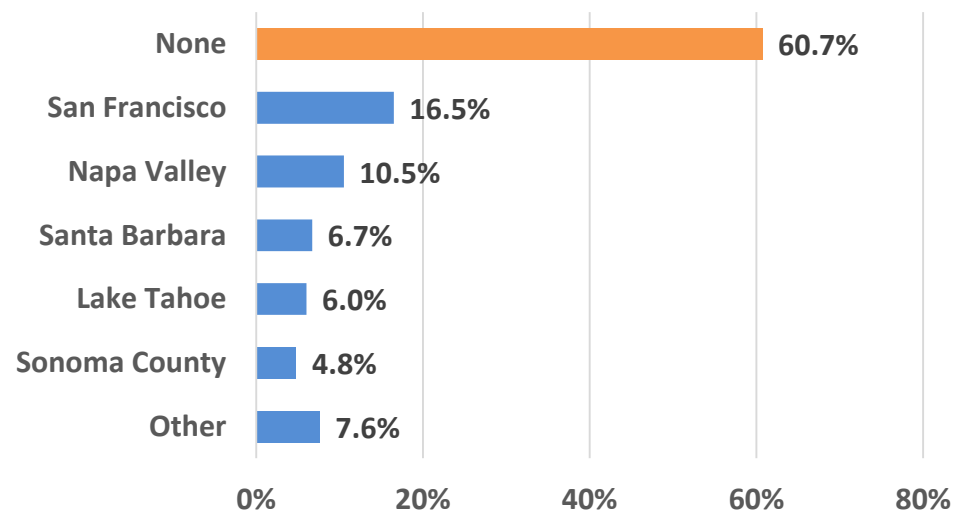
Question: Would you return to Monterey County?

Base: All respondents. 1,047 completed surveys.

Other Destinations Considered

Six-in-ten visitors surveyed did not consider other destinations when they made the decision to visit Monterey County (60.7%--up from 55.8% in 2016). Visitors surveyed were presented a list of competitive destinations and asked which they had considered visiting before making the decision to visit Monterey County. For visitors who were considering another destination before ultimately deciding to travel to Monterey County, San Francisco (16.5%) and Napa Valley (10.5%) were the top destinations considered.

Figure 22: Other Destinations Considered



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
None	55.7%	76.6%	63.5%
San Francisco	19.9%	9.1%	14.8%
Napa Valley	13.2%	3.9%	8.3%
Santa Barbara	7.4%	2.6%	5.2%
Lake Tahoe	7.2%	5.2%	3.0%
Sonoma County	6.3%	3.9%	2.2%
Other	8.6%	2.6%	6.1%
Sample size:	632	82	234

Question: Which of the following did you also consider visiting for this trip, before choosing Monterey County? (Select all that apply)

Base: All respondents. 1,057 completed surveys.

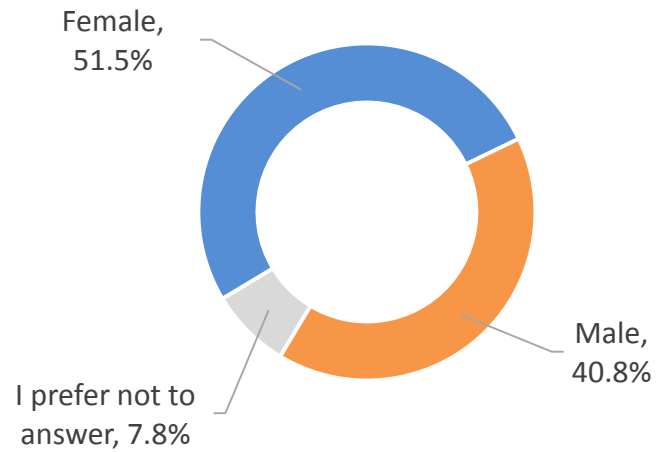
Demographics

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Gender

In 2017, Monterey County visitors surveyed skewed female. In total, 51.7 percent of the sample were female and 40.8 percent were male.

Figure 25: Gender



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Female	52.0%	50.7%	49.8%
Male	41.0%	40.0%	42.2%
I prefer not to answer	6.9%	9.3%	8.1%
Sample size:	605	80	240

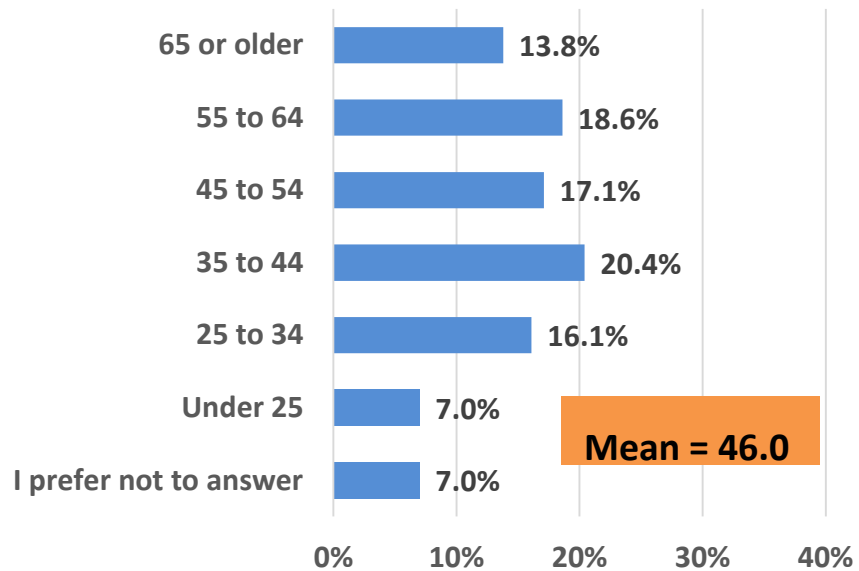
Question: What is your gender? (Select one)

Base: All respondents. 1,043 completed surveys.

Age

The average age of Monterey County visitors surveyed was 46.0 years. Nearly one-quarter of visitors were Millennials (23.1%), while over one-third were Gen X (37.5%) and one-third were Baby Boomers (32.4%). On average, Day-trippers were comparatively the youngest visitor segment (43.1), while Lodging guests were the oldest (47.7).

Figure 26: Age



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
65 or older	15.3%	14.5%	12.0%
55 to 64	21.1%	25.0%	12.9%
45 to 54	18.3%	10.5%	17.8%
35 to 44	20.6%	15.8%	19.6%
25 to 34	12.7%	19.7%	20.0%
Under 25	4.8%	10.5%	10.7%
I prefer not to answer	7.2%	3.9%	7.1%
Mean	47.7	46.0	43.1
Sample size:	609	81	241

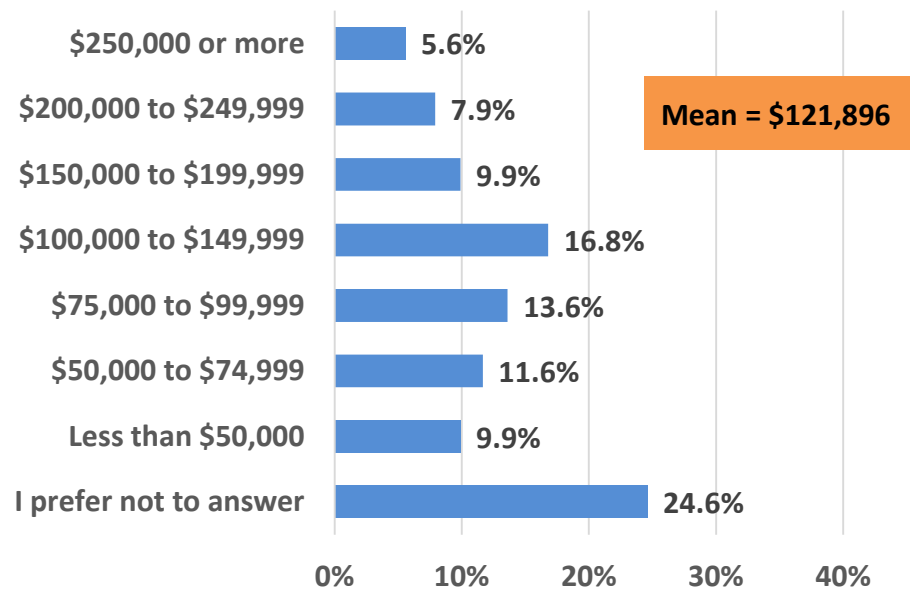
Question: What is your age? (Select one)

Base: All respondents. 1,049 completed surveys.

Annual Household Income

Monterey County’s visitors are an affluent group. Over 40 percent of Monterey County visitors have an annual household income of \$100,000 or more (40.2%), with the average annual household income being \$121,896. Lodging guests have the highest average household income (\$140,798) compared to other visitor types.

Figure 27: Annual Household Income



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
\$250,000 or more	8.9%	2.7%	0.4%
\$200,000 to \$249,999	11.2%	4.1%	4.9%
\$150,000 to \$199,999	11.7%	9.5%	7.1%
\$100,000 to \$149,999	19.2%	13.5%	16.0%
\$75,000 to \$99,999	12.6%	17.6%	13.8%
\$50,000 to \$74,999	8.3%	16.2%	15.1%
Less than \$50,000	4.6%	17.6%	15.1%
I prefer not to answer	23.4%	18.9%	27.6%
Mean	\$140,798	\$95,283	\$94,134
Sample size:	582	77	230

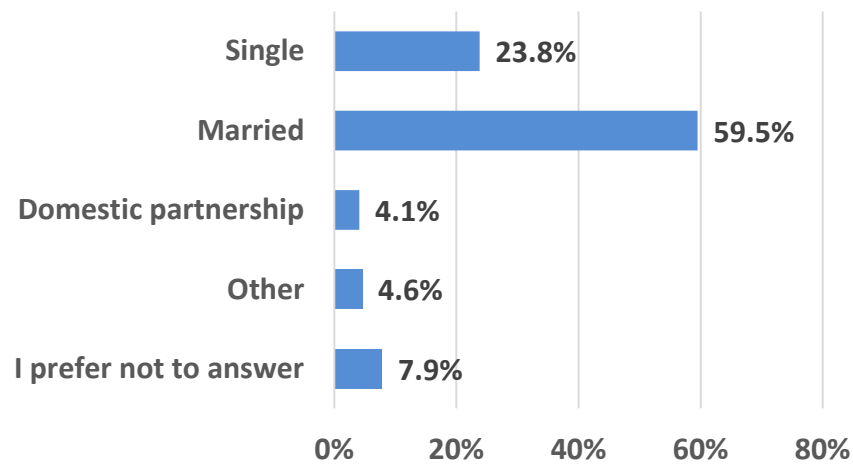
Question: Which best describes the combined annual income of all members of your household? (Select one)

Base: All respondents. 1,003 completed surveys.

Marital Status

Nearly two-thirds of visitors surveyed are married (59.5%) or partnered (4.1%), while one-in-four visitors are single (23.8%).

Figure 28: Marital Status



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Single	17.8%	32.9%	33.3%
Married	67.2%	53.9%	47.8%
Domestic Partnership	4.1%	2.6%	3.5%
Other	2.7%	6.6%	7.0%
I prefer not to answer	8.2%	3.9%	8.3%
Sample size:	596	79	236

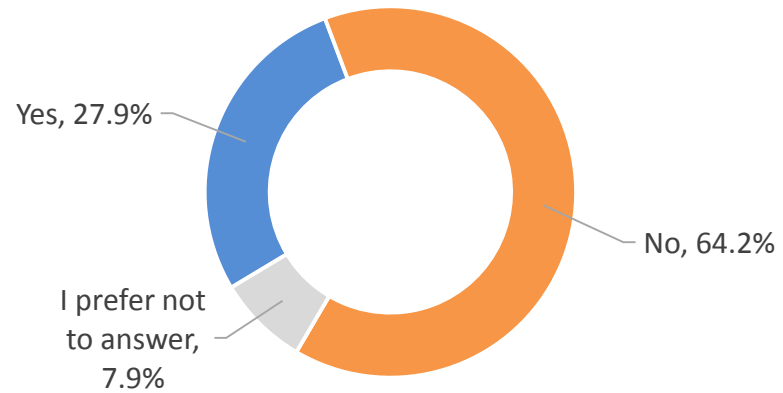
Question: Which of the following best describes your current marital status? (Select one)

Base: All respondents. 1,026 completed surveys.

Children in Household

Nearly 30 percent of Monterey County visitors surveyed have children under the age of 18 residing in their household (27.9%).

Figure 29: Children in Household



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Yes	27.3%	30.3%	27.4%
No	64.9%	65.8%	63.7%
I prefer not to answer	7.8%	3.9%	8.8%
Sample size:	602	80	238

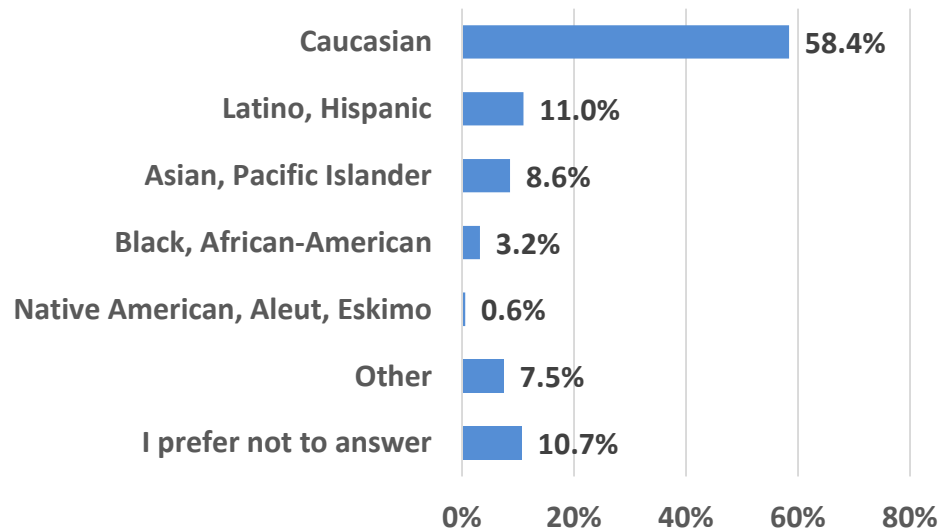
Question: Are there any children under 18 years of age currently living in your household?

Base: All respondents. 1,037 completed surveys.

Ethnicity

Monterey County visitors surveyed were ethnically diverse. In total, 58.4 percent of visitors surveyed were Caucasian while three-in-ten identified as a non-Caucasian ethnicity (30.9%). The largest non-Caucasian visitor groups were Latino or Hispanic (11.0%), Asian, Pacific Islander (8.6%) and Black, African-American (3.2%).

Figure 30: Ethnicity



Question: Which best describes your ethnicity? (Select one)

Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Caucasian	62.7%	68.0%	49.1%
Latino, Hispanic	8.7%	4.0%	16.8%
Asian, Pacific Islander	9.2%	5.3%	8.8%
Black, African-American	2.8%	5.3%	4.0%
Native American, Aleut, Eskimo	0.2%	1.3%	1.3%
Other	6.2%	8.0%	8.8%
I prefer not to answer	10.2%	8.0%	11.1%
Sample size:	590	78	234

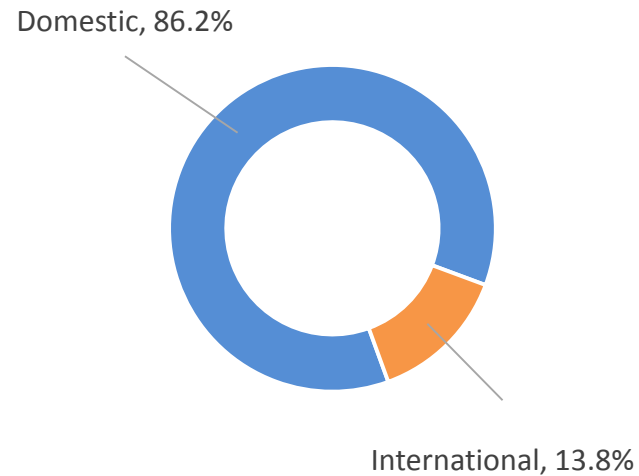
Base: All respondents. 1,017 completed surveys.

Point of Origin: Countries of Residence

In total, 86.2 percent of visitors surveyed were domestic residents while the remaining 13.8 percent were international visitors. Visitors from the United Kingdom (2.7%), Canada (1.6%) and Germany (1.6%) represented the largest percentage of the international travelers to Monterey County, followed by China (1.0%).

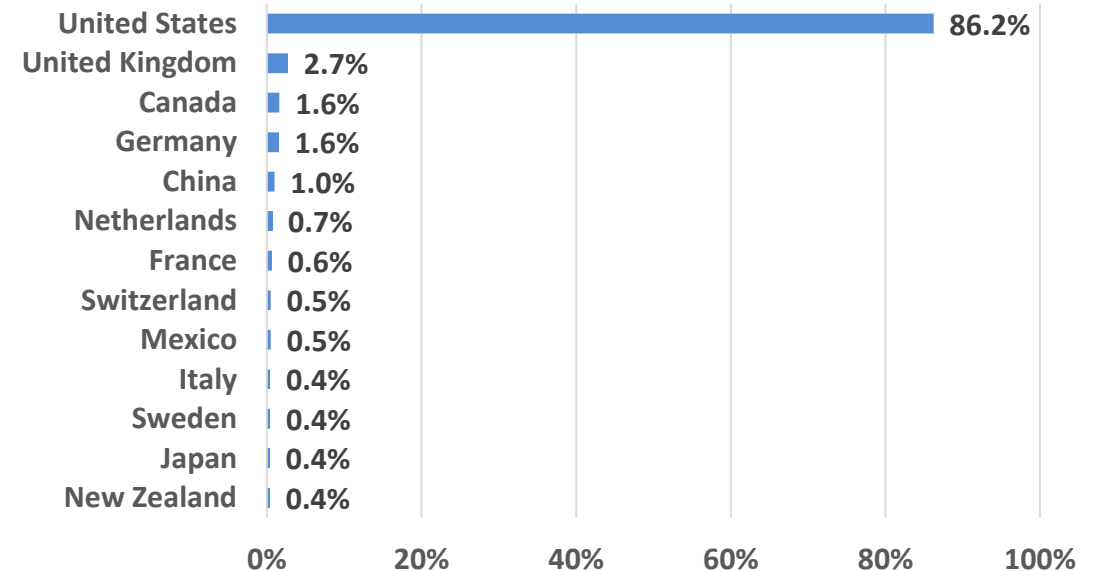
Note: The survey was only available in English.

Figure 31: Point of Origin—Domestic vs. International



Question: What is your zip/postal code?

Figure 32: Point of Origin—Top Countries

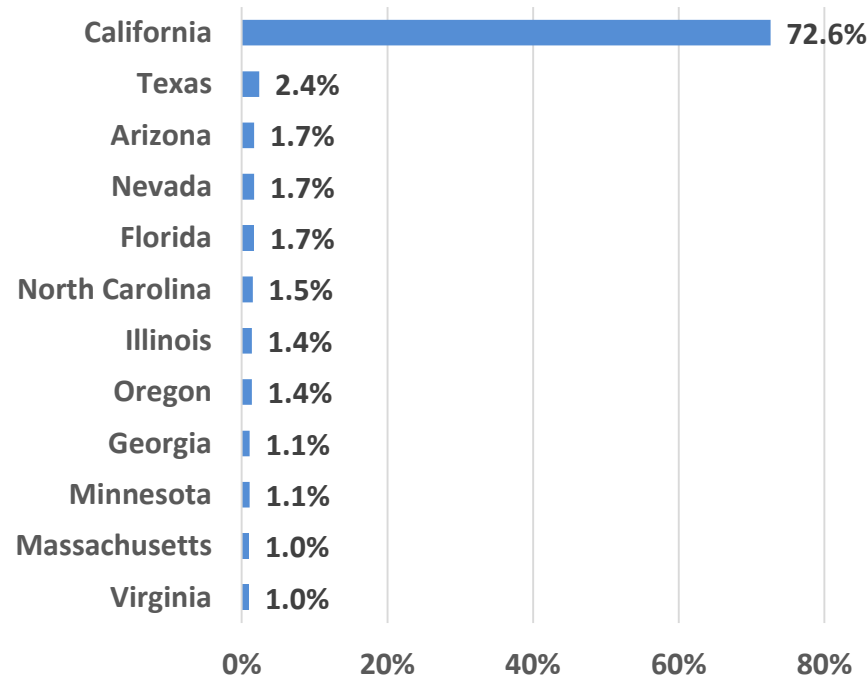


Base: All respondents. 1,029 completed surveys.

Point of Origin: Top States of Residence

In total, 72.6 percent of domestic visitors surveyed reside within the state of California. A larger proportion of domestic visitors surveyed in 2017 were out-of-state residents compared to 2016 (27.4% vs. 22.0%, respectively). The highest visitation from out-of-state residents were from Texas (2.4%), Arizona (1.7%), Nevada (1.7%) and Florida (1.7%).

Figure 33: Point of Origin—Top States



Question: What is your zip/postal code?

Detail by Type of Visitor

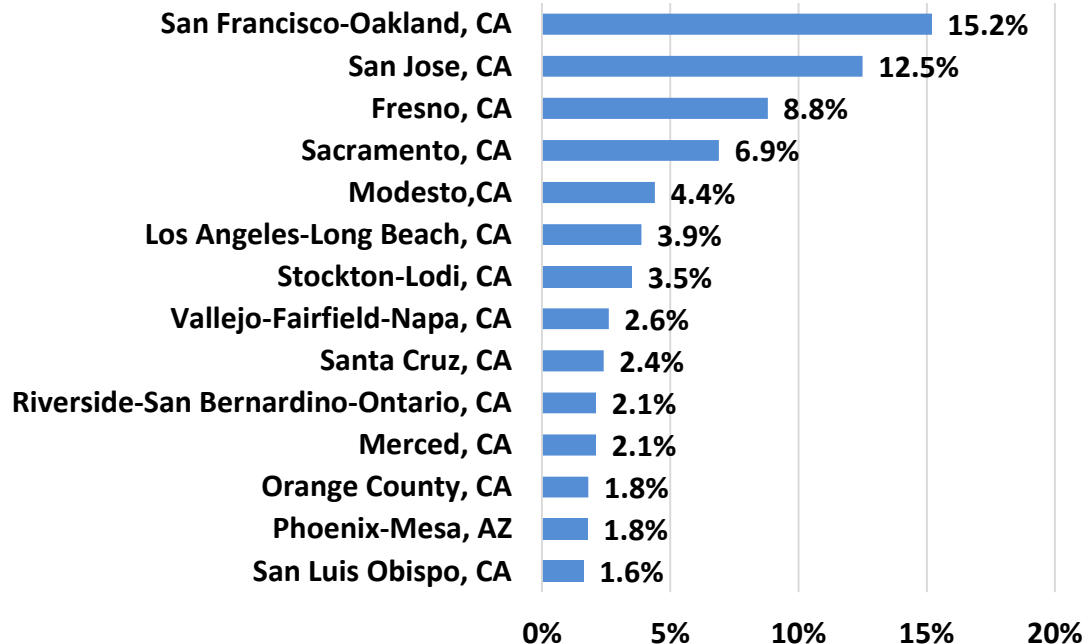
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
California	66.6%	60.9%	84.9%
Texas	3.1%	1.6%	1.0%
Arizona	2.3%	3.1%	0.0%
Nevada	2.5%	0.0%	1.0%
Florida	1.5%	1.6%	1.6%
North Carolina	1.3%	3.1%	1.0%
Illinois	1.9%	4.7%	0.0%
Oregon	1.3%	3.1%	1.6%
Georgia	1.3%	3.1%	0.5%
Minnesota	1.3%	3.1%	0.5%
Massachusetts	1.0%	1.6%	0.5%
Virginia	1.7%	0.0%	0.0%
Sample size:	517	69	207

Base: Domestic respondents. 885 completed surveys.

Point of Origin: Top MSAs of Residence

Monterey County’s top domestic feeder markets represented in this survey were San Francisco-Oakland, CA (15.2%) and San Jose, CA (12.5%). These were followed by Fresno, CA (8.8%) and Sacramento, CA (6.9%).

Figure 34: Point of Origin—Top MSAs (% of domestic visitors)



Question: What is your zip/postal code?

Detail by Type of Visitor

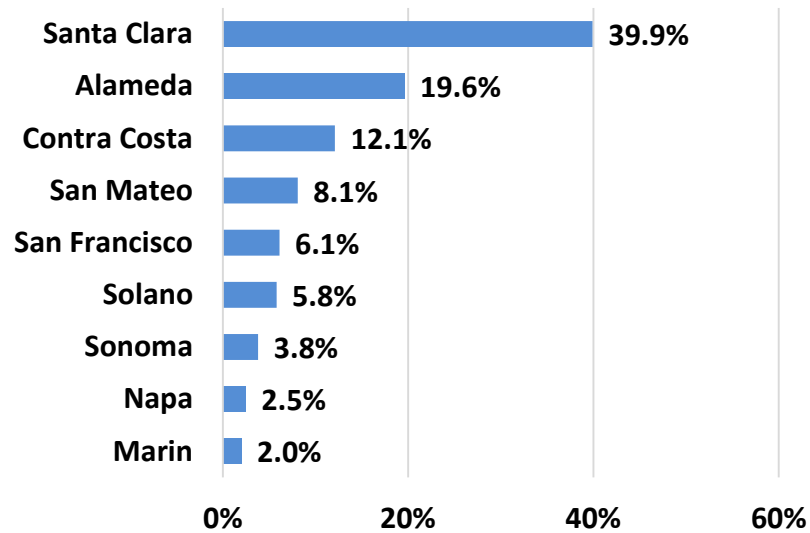
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
San Francisco-Oakland, CA	11.1%	12.5%	20.8%
San Jose, CA	10.2%	7.1%	16.9%
Fresno, CA	7.2%	8.9%	12.9%
Sacramento, CA	8.1%	3.6%	5.6%
Modesto, CA	4.8%	1.8%	5.1%
Los Angeles-Long Beach, CA	3.8%	5.4%	2.2%
Stockton-Lodi, CA	3.4%	1.8%	5.6%
Vallejo-Fairfield-Napa, CA	3.2%	3.6%	0.6%
Santa Cruz, CA	0.9%	3.6%	5.6%
Riverside-San Bernardino-Ontario, CA	1.6%	5.4%	2.2%
Merced, CA	1.6%	0.0%	5.1%
Orange County, CA	2.3%	5.4%	0.6%
Phoenix-Mesa, AZ	2.3%	3.6%	0.0%
San Luis Obispo-Atascadero-Paso Robles, CA	1.1%	1.8%	1.1%
Sample size:	481	60	193

Base: Domestic respondents. 821 completed surveys.

Point of Origin: Bay Area Residents (Top Counties)

The largest proportion of San Francisco Bay Area visitors surveyed reside in the nearby county of Santa Clara (39.9%). This is followed by residents of Alameda County (19.6%) and Contra Costa (12.1%).

Figure 35: Point of Origin—Top Counties



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Santa Clara	39.3%	28.6%	44.1%
Alameda	16.2%	7.1%	25.0%
Contra Costa	10.3%	28.6%	11.8%
San Mateo	8.5%	14.3%	7.4%
Solano	5.1%	0.0%	7.4%
Sonoma	8.5%	7.1%	1.5%
San Francisco	7.7%	7.1%	0.0%
Napa	3.4%	7.1%	0.0%
Marin	0.9%	0.0%	2.9%
Sample size:	127	15	77

Question: What is your zip/postal code?

Base: Bay Area respondents. 246 completed surveys.



Thank you

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