



Monterey County Convention and Visitors Bureau

**2016 Monterey County Visitor Profile  
Final Report of Findings**

January 2017

# Research Overview & Objectives

This report presents the findings of a Monterey County visitor profile study conducted by Destination Analysts, Inc. on behalf of the Monterey County Convention & Visitors Bureau. The study is based on visitor survey data collected throughout 2016, including from a survey distributed in a selection of the county's lodging properties, and an intercept survey of visitors conducted at locations around the county. The study's key informational goals were to develop a comprehensive profile of visitors to the county and understand their:

- Reasons for visiting Monterey County
- Trip characteristics
- Travel party profiles
- In-market spending
- Travel planning resources used
- Activities in Monterey County
- Evaluation of the Monterey County visitor experience, and
- Demographic and geographic profiles



# Methodology

The profile of Monterey County visitors presented in this report uses data collected in two separate primary research projects. A survey of the county's lodging guests distributed at area lodging properties and an intercept survey of visitors conducted at locations throughout the destination. For both efforts, the same base survey questionnaire was used, yielding a total sample of 1,313 completed surveys. 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. A brief description of the two data collection methods follows.

## **(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, 239 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 in-market intercept survey was conducted of visitors to Monterey County. Destination Analysts' surveyors worked at locations throughout the 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 surveyed.

**During 2016, visitor surveys were conducted at the following locations:**

- Cannery Row
- Fisherman's Wharf
- Lover's Point
- Carmel Plaza
- Carmel Valley Village
- Pacific Grove
- Monterey Marriott
- Portola Hotel
- Intercontinental the Clement Monterey
- Monterey Plaza Hotel



*Destination Analysts' staff surveying visitors at Carmel Plaza*



# Snapshot of Findings

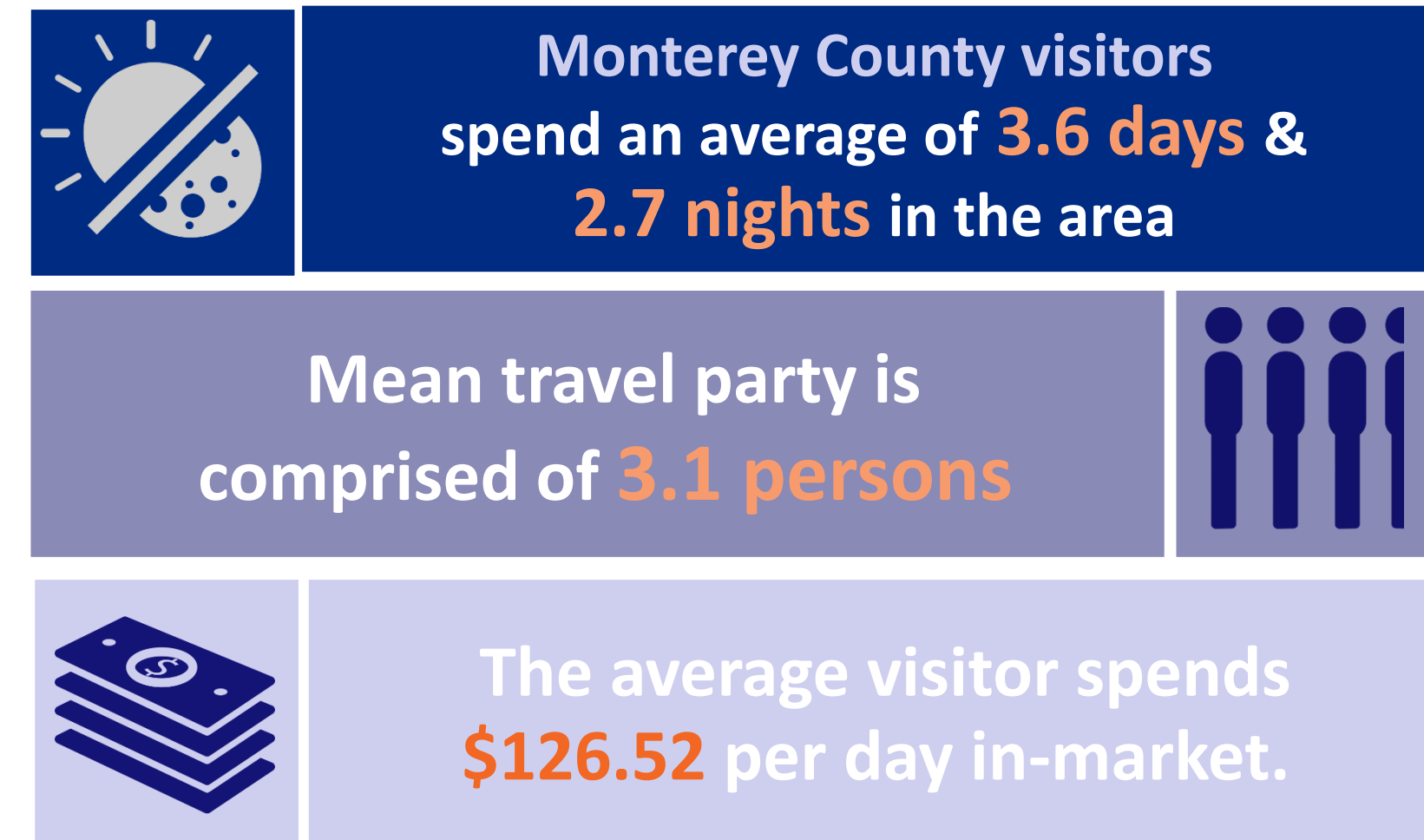
*The following two slides illustrate key findings from both the visitor intercept and lodging guest surveys.*

# The Monterey County Visitor – Snapshot of Findings

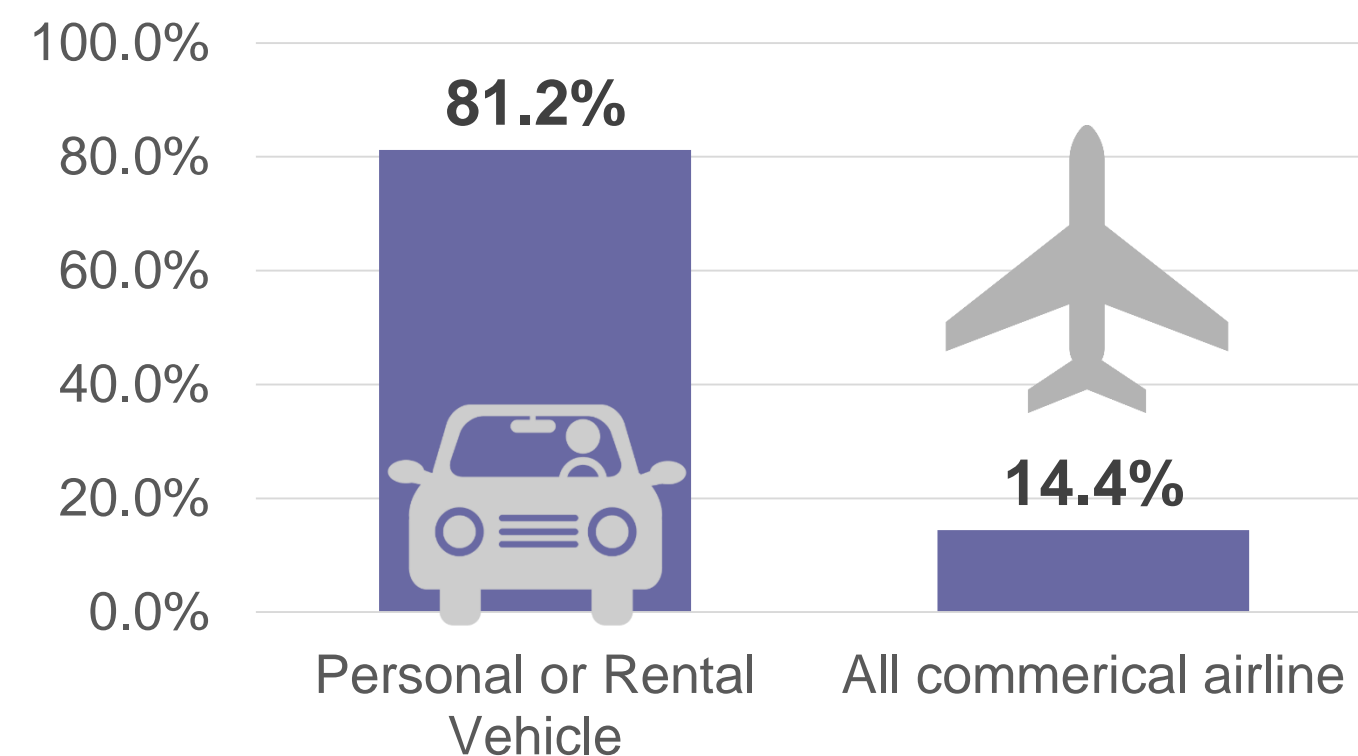
## Primary Reasons for Visiting Monterey County (% of respondents)



## Visitor Trip Details (% of respondents)

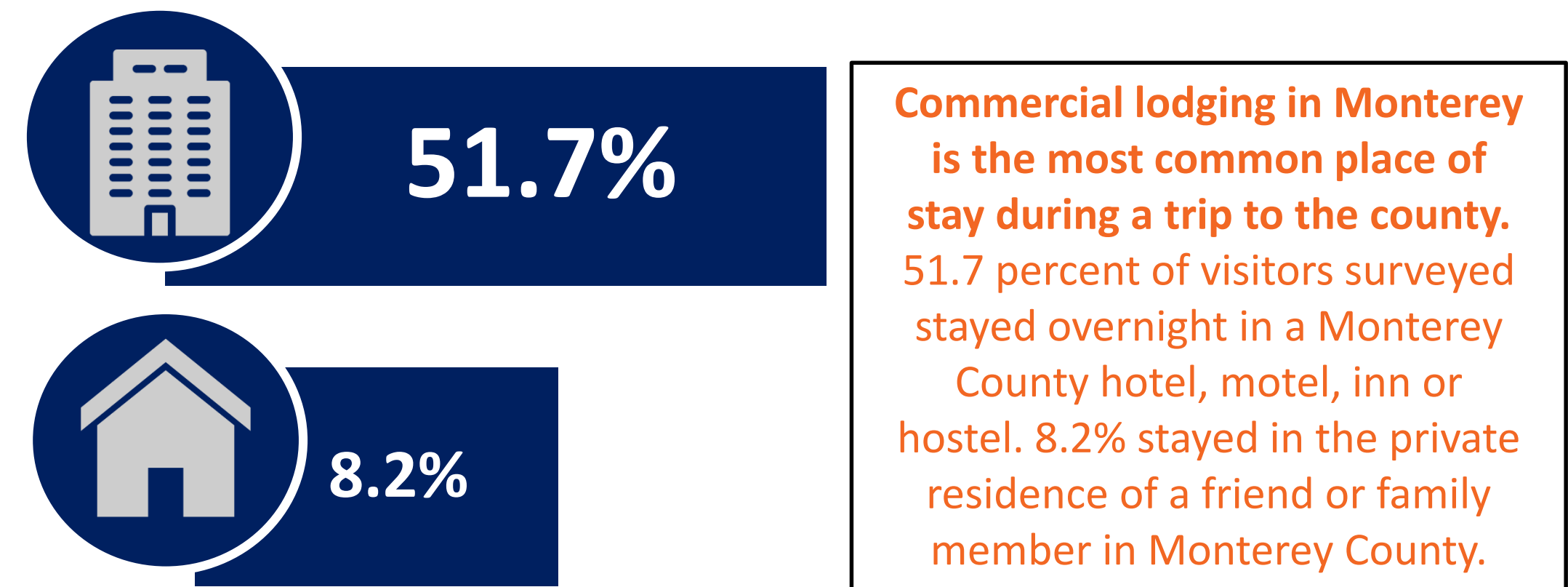


## Method of Arrival into Monterey County (% of respondents)



Arrival by personal or rental vehicle was the dominant method of arrival among Monterey County visitors. This was followed by arrival via commercial airline. 7.4% of visitors flew into MRY.

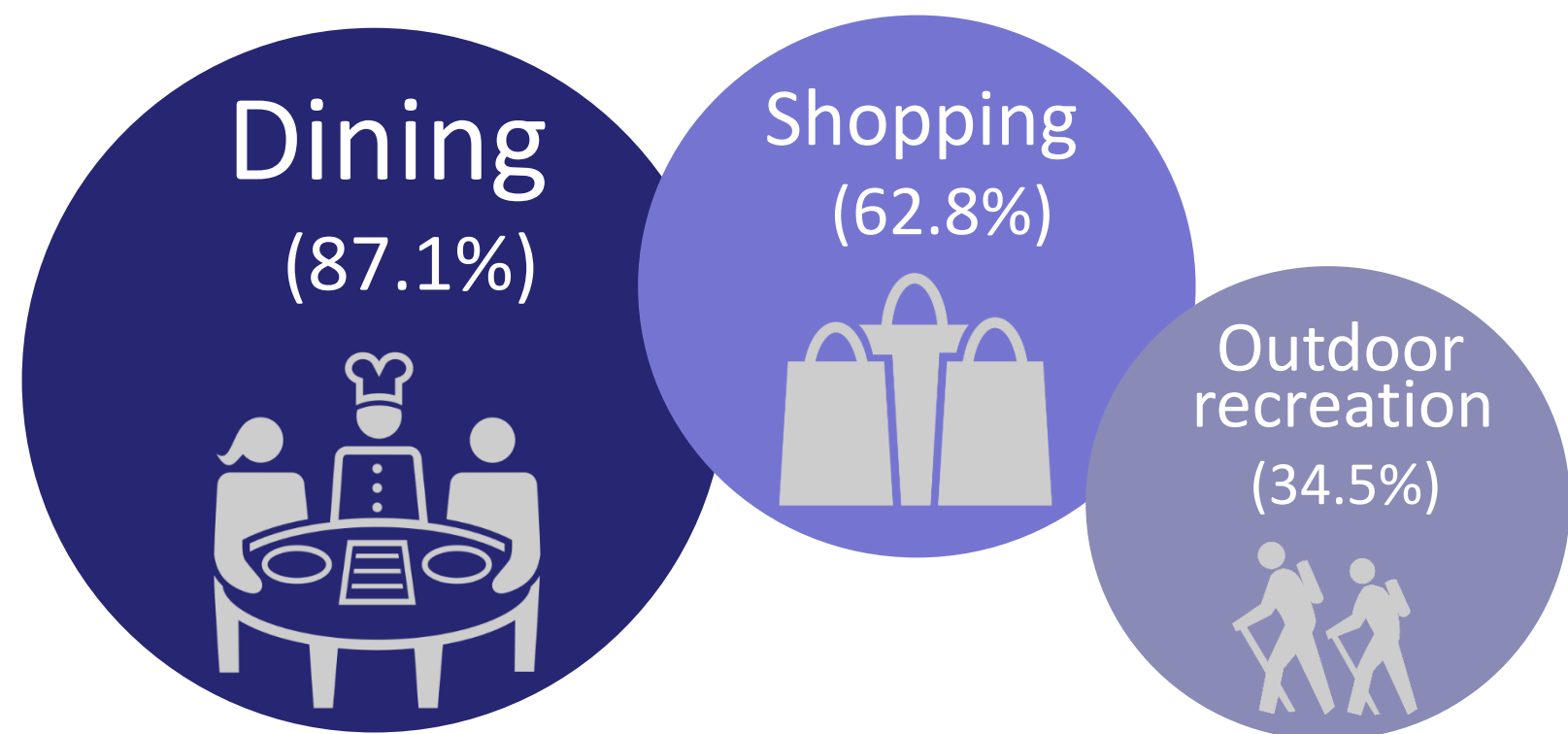
## Place of Stay in Monterey County (% of respondents)



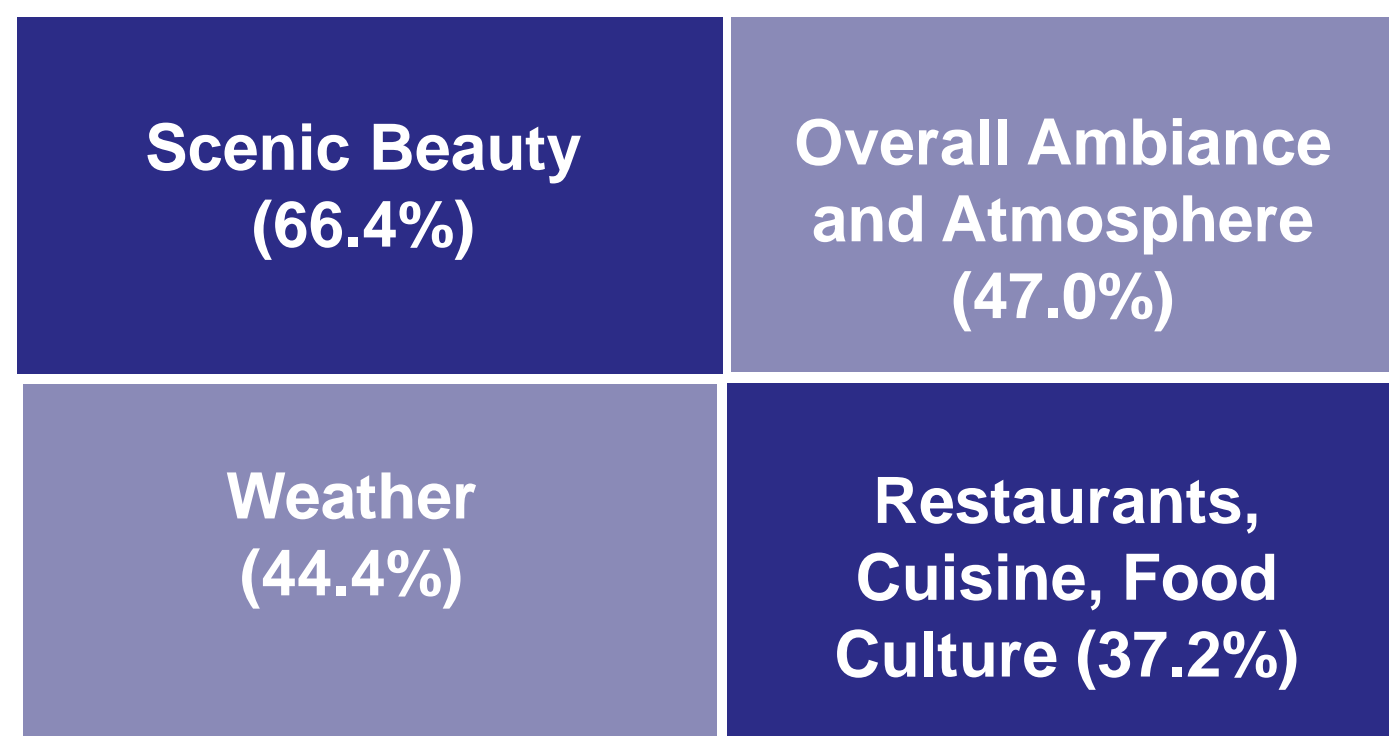
Commercial lodging in Monterey is the most common place of stay during a trip to the county. 51.7 percent of visitors surveyed stayed overnight in a Monterey County hotel, motel, inn or hostel. 8.2% stayed in the private residence of a friend or family member in Monterey County.

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

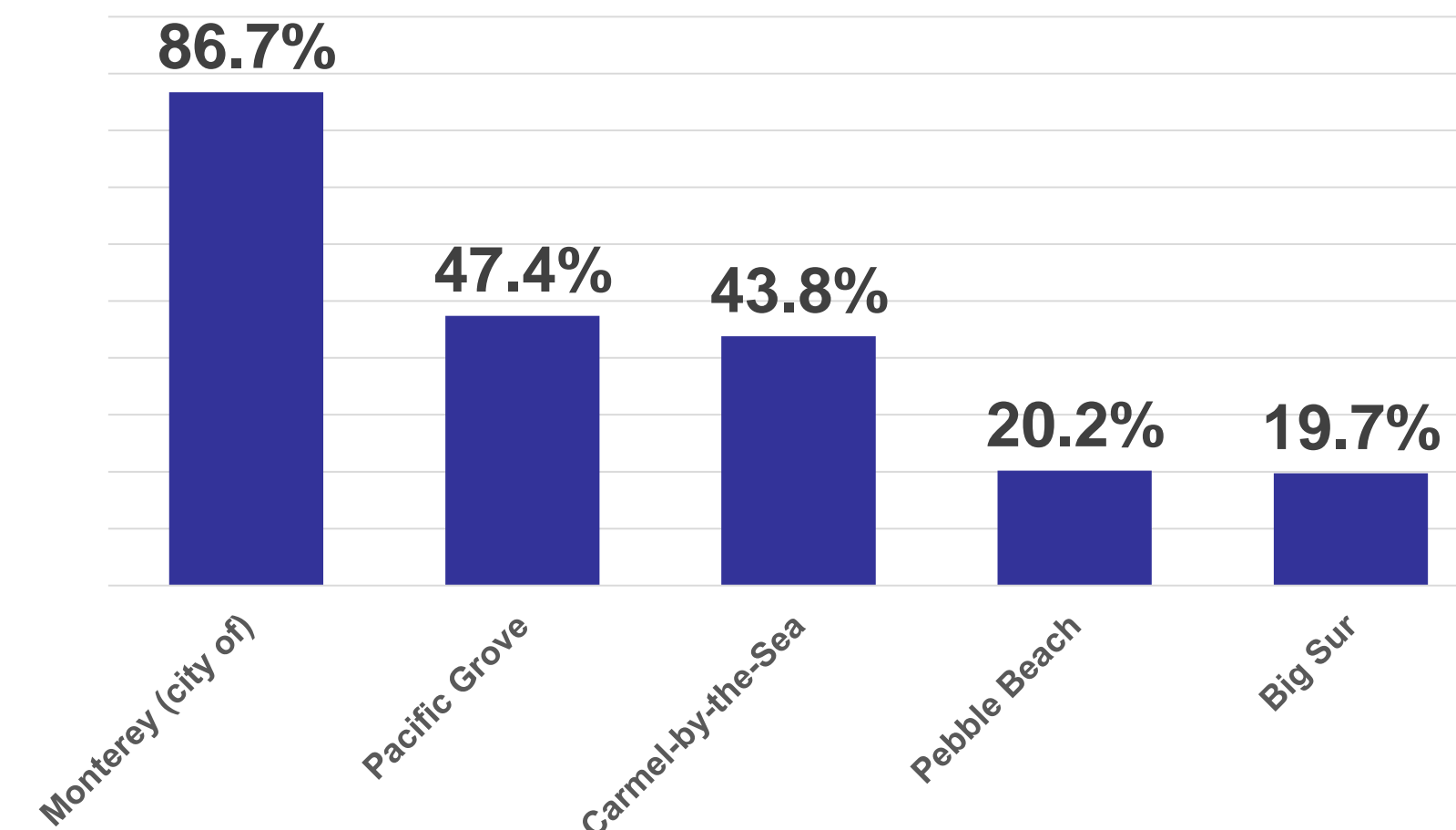
**Top Monterey County Activities** (% of respondents who reported participating in each activity)



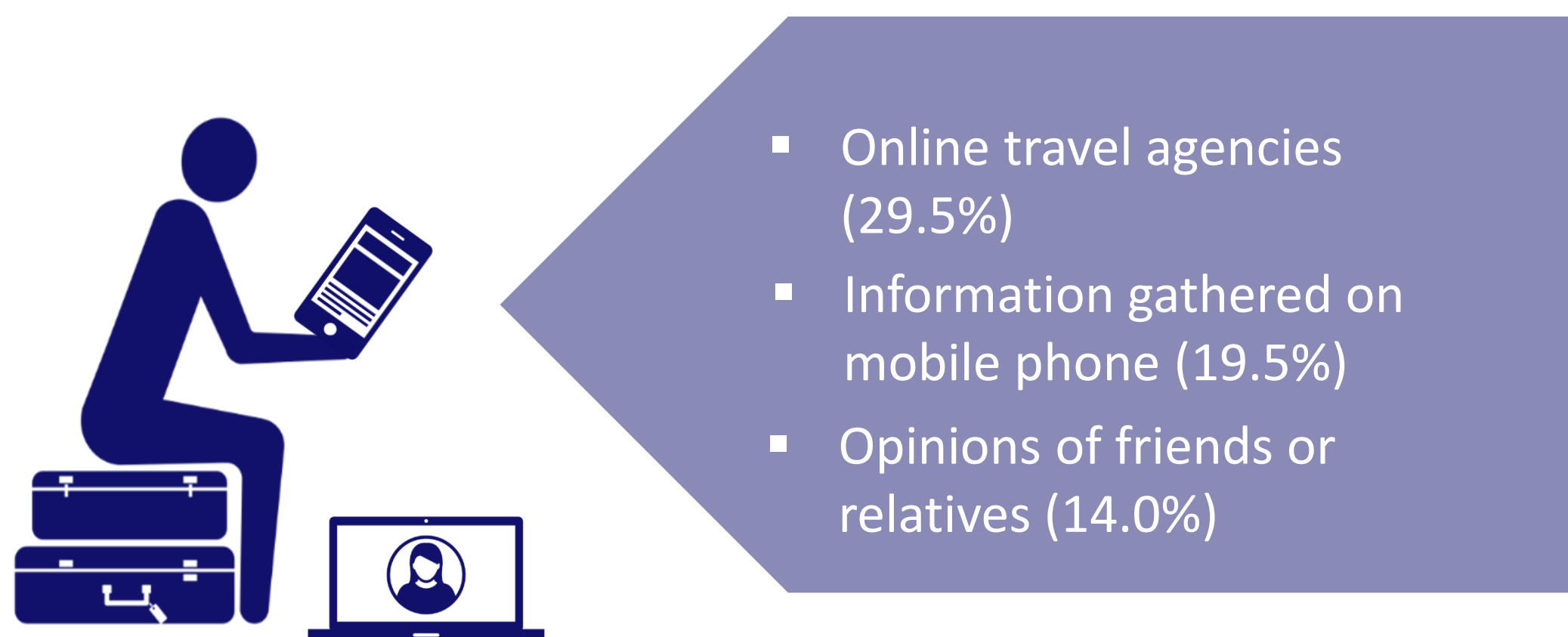
**Top Motivations for Visiting** (% of respondents)



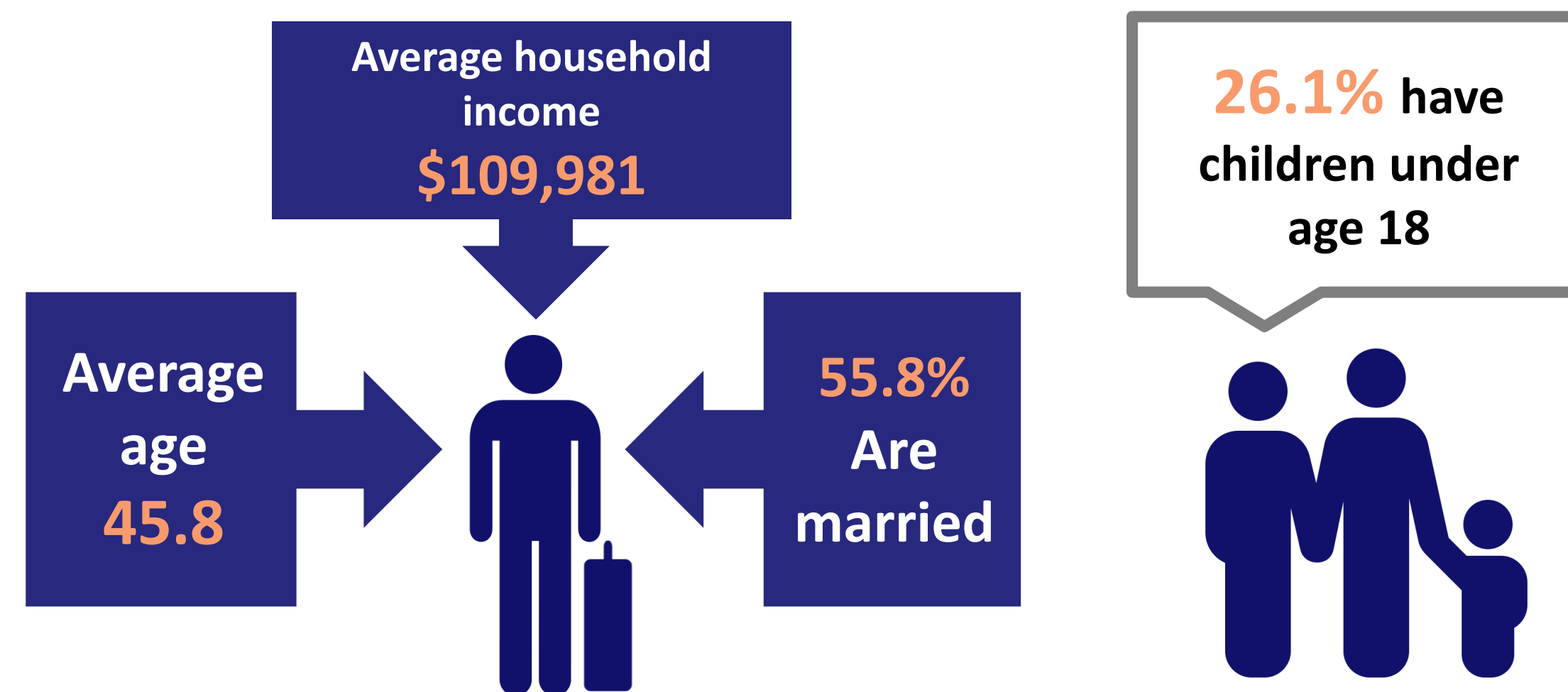
**Monterey County Areas Visited** (% of respondents)



**Top Travel Planning Resources Used Before Trip** (% of respondents)



**Traveler Demographics** (% of respondents)





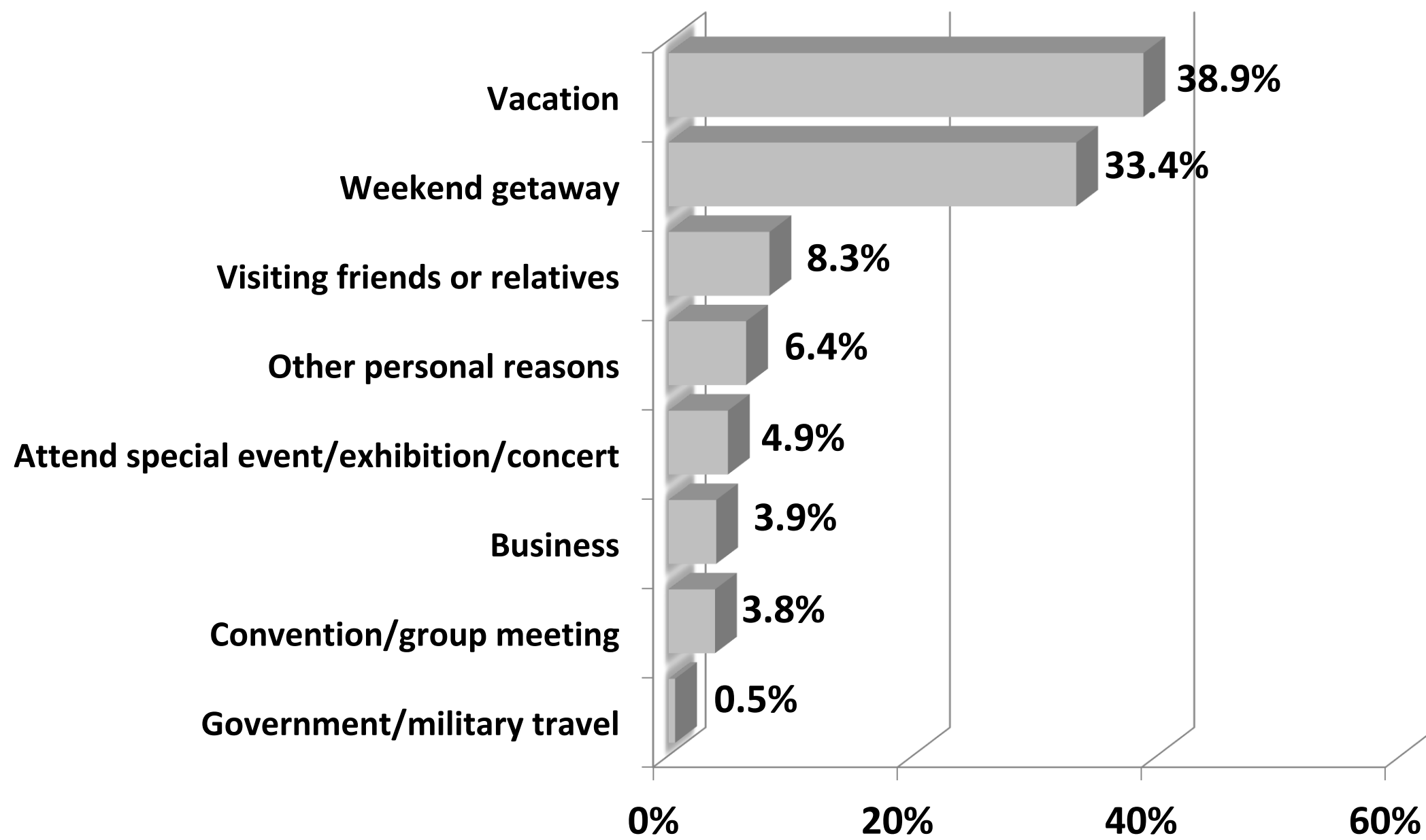


# DETAILED FINDINGS

# Primary Reason for Monterey County Trip

A majority of Monterey County visitors surveyed came to the destination for leisure purposes (72.3%). Four-in-ten were in the area for a vacation (38.9%), while a third were visiting for a weekend getaway (33.4%). In addition, 8.3 percent were visiting local friends or relatives and 6.4 percent came for other personal reasons.

Chart 1: Primary Reason for Monterey County Trip



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

Detail by Type of Visitor

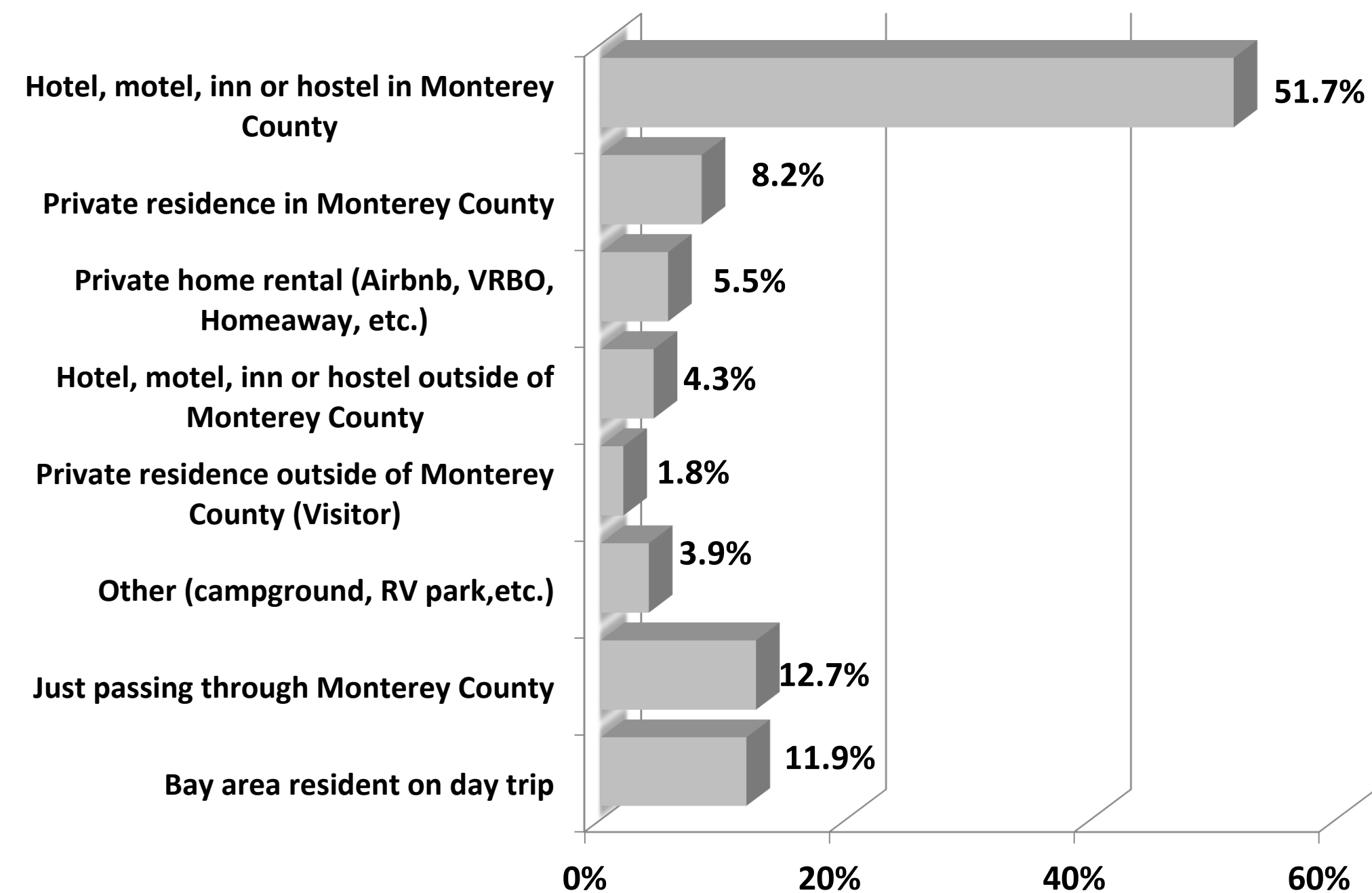
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Vacation	40.5%	22.4%	38.2%
Weekend getaway	33.3%	19.4%	39.6%
Visiting friends or relatives	4.7%	38.8%	5.8%
Other personal reasons	3.5%	13.4%	9.8%
Attend special event/exhibition/concert	5.8%	4.5%	3.6%
Business	5.5%	0.0%	2.2%
Convention/group meeting	6.2%	1.5%	0.7%
Government/military travel	0.6%	0.0%	0.0%
<b>Base</b>	<b>833</b>	<b>67</b>	<b>275</b>

Base: All respondents. 1,294 completed surveys.

# Place of Stay

**Half of all area visitors stayed overnight in commercial lodging in Monterey County during their visit (51.7%).** In addition, 8.4 percent stayed in a private residence of a friend or family member in Monterey County and 5.5 percent rented a home. Day-trippers—including those staying in paid or private accommodations outside Monterey County, those passing through and Bay area residents on leisure day trips—represented 30.7 percent of visitors surveyed.

**Chart 2: Place of Stay**



**Detail by Type of Visitor**

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Hotel, motel, inn or hostel in Monterey County	100.0%	0.0%	0.0%
Private residence in Monterey County	0.0%	100.0%	0.0%
Private home rental	0.0%	0.0%	0.0%
Hotel, motel, inn or hostel outside of Monterey County	0.0%	0.0%	13.7%
Private residence outside of Monterey County	0.0%	0.0%	6.1%
Other (campground, RV park, etc.)	0.0%	0.0%	0.0%
Just passing through Monterey County	0.0%	0.0%	46.8%
Bay area resident on day trip	0.0%	0.0%	33.5%
<b>Base</b>	<b>1031</b>	<b>67</b>	<b>278</b>

Question: Where are you staying on this trip to Monterey County? (Select one)

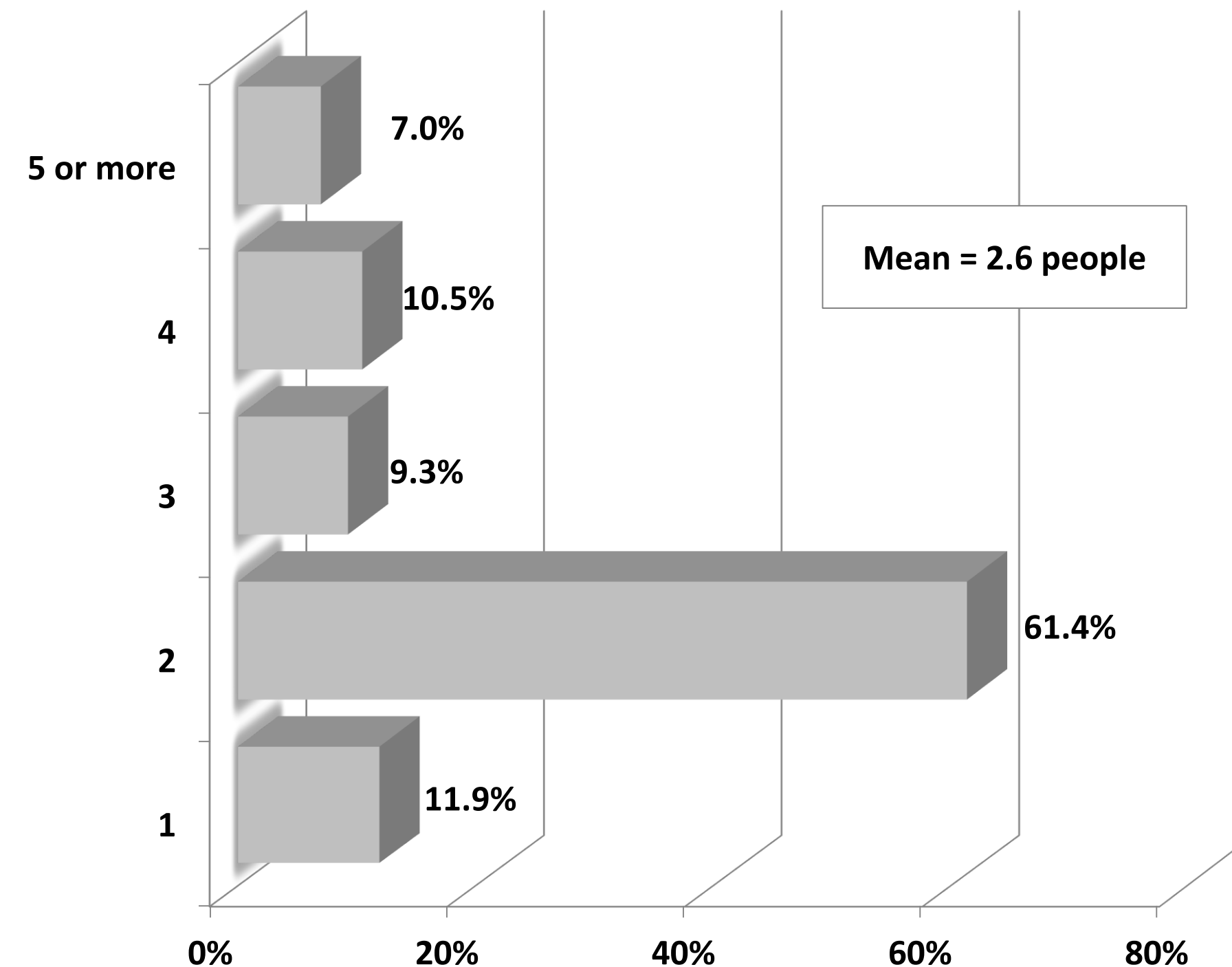
Base: All respondents. 1313 completed surveys.

# Hotel Guests: Number of People in Hotel Room

On average, there were 2.6 hotel guests staying overnight in a Monterey County hotel room. Visitors who stayed in a Monterey County hotel were asked how many people, including themselves, stayed in their room. Over 60 percent of these visitors reported that there were just two people who stayed in their hotel room (61.4%). Ten percent were the sole occupant of their hotel room (11.9%).

Question: Including yourself, how many people stayed in your hotel room?  
Base: Respondents staying overnight in a Monterey County hotel. 831 completed surveys.

Chart 3: Number of People in Hotel Room

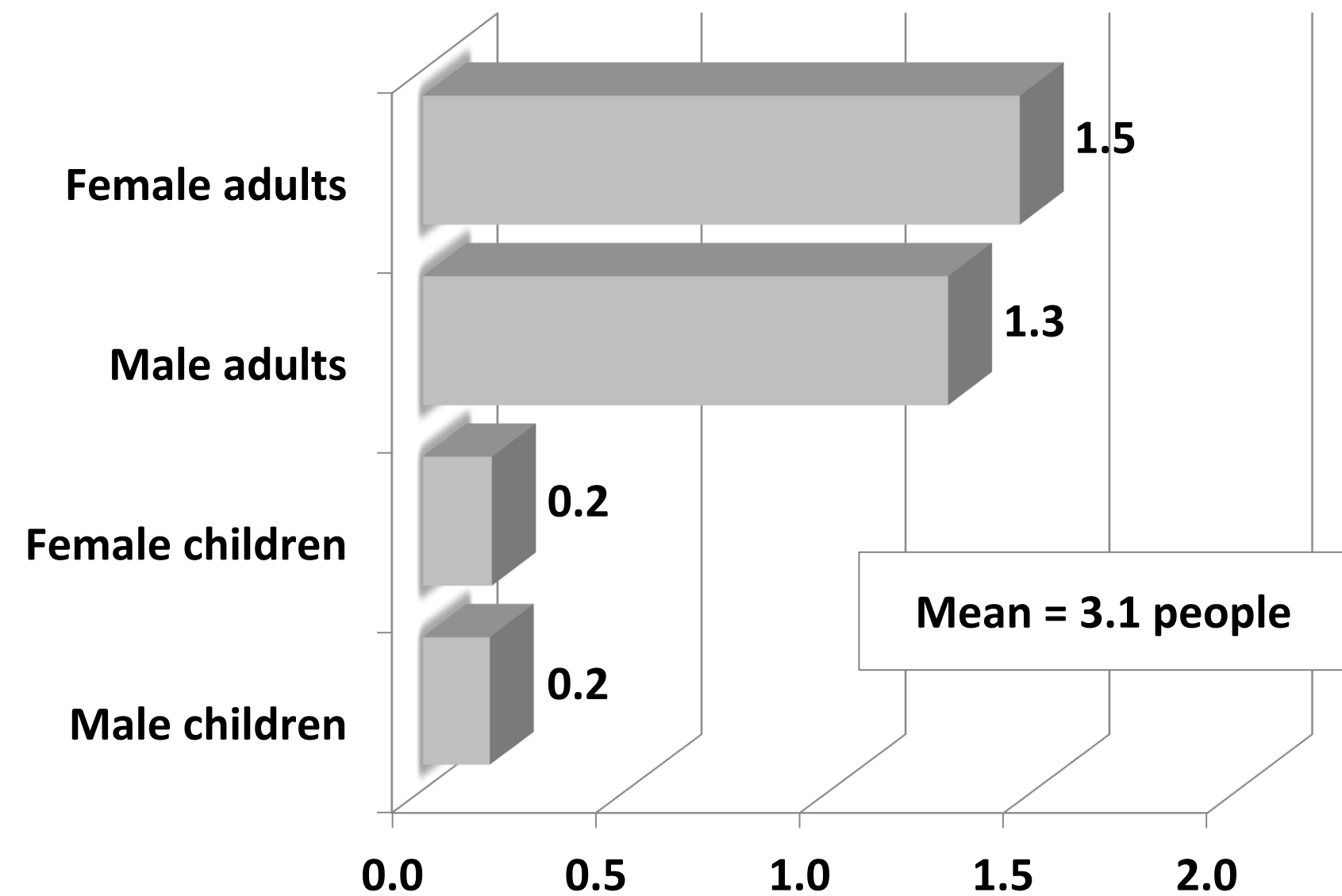


# Travel Party Composition

The typical travel party to Monterey County was comprised of 3.1 persons. This average travel party included 1.5 female and 1.3 male adults.

Approximately 20 percent of travel parties included children under age 18 (18.7%). Lodging guests were less likely to have children in their travel party compared to other visitor types (13.3% vs. 22.4% VFR and 26.5% Day-trippers).

Chart 4: Travel Party Composition



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

Detail by Type of Visitor

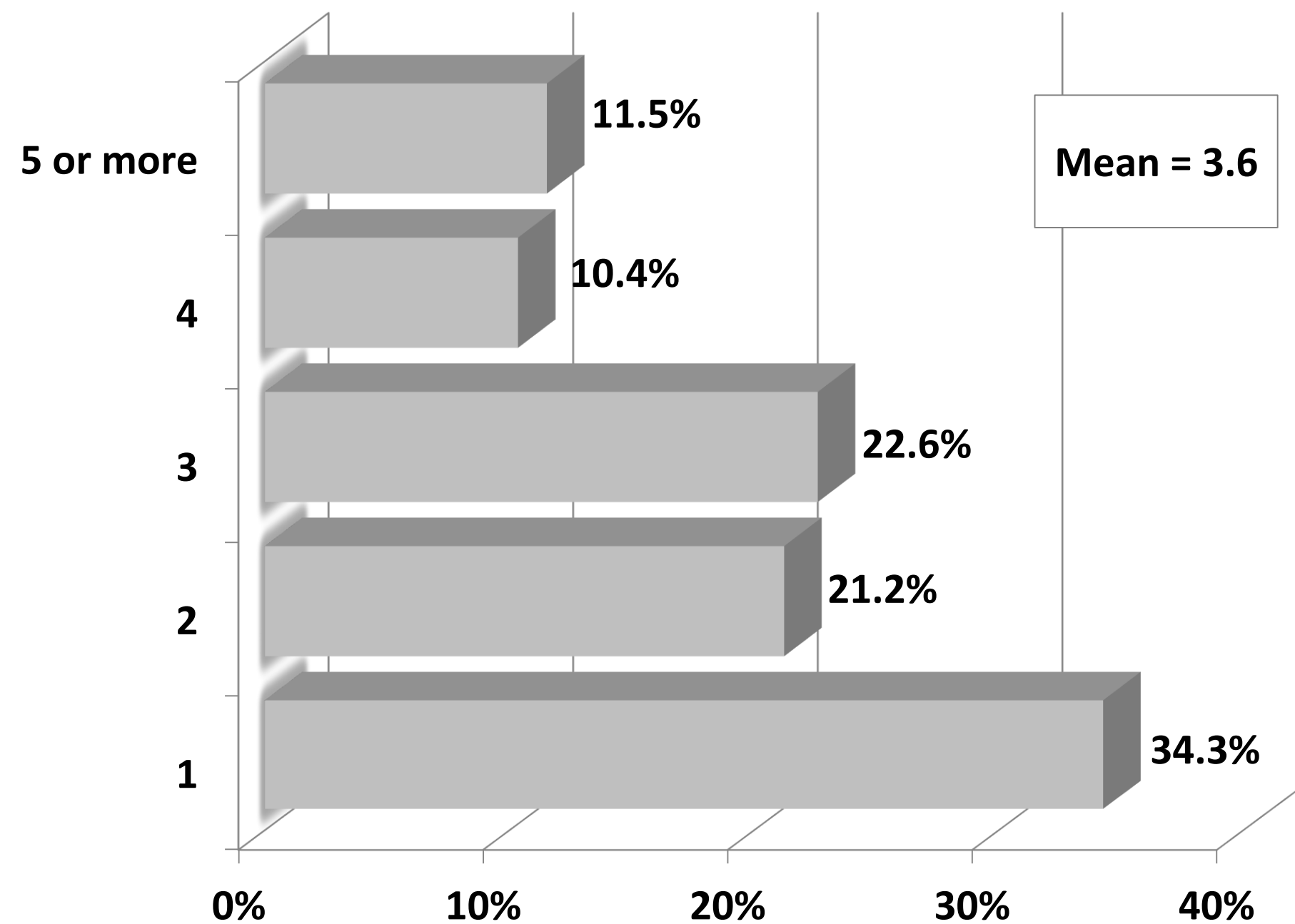
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Female adults	1.5	1.2	1.6
Male adults	1.4	0.9	1.3
Female children	0.1	0.2	0.3
Male children	0.1	0.2	0.2
<b>Travel Party Mean</b>	<b>3.1</b>	<b>2.4</b>	<b>3.4</b>
<b>Travel Parties with Children</b>	<b>13.3%</b>	<b>22.4%</b>	<b>26.5%</b>
<b>Base</b>	<b>822</b>	<b>67</b>	<b>272</b>

Base: All respondents. 1282 completed surveys.

# Days in Monterey County

The average Monterey County visitor surveyed spent 3.6 days in the county during their trip. VFRs had the longest length of stay in Monterey County, averaging a week (7.2 days). Lodging guests typically spent 3.2 days in Monterey County.

Chart 5: Days in Monterey County



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
5 or more	11.1%	22.7%	2.4%
4	13.9%	15.2%	1.2%
3	31.6%	30.3%	3.3%
2	30.5%	21.2%	6.1%
1	13.0%	10.6%	86.9%
<b>Mean</b>	<b>3.2</b>	<b>7.2</b>	<b>1.7</b>
<b>Base</b>	<b>823</b>	<b>66</b>	<b>245</b>

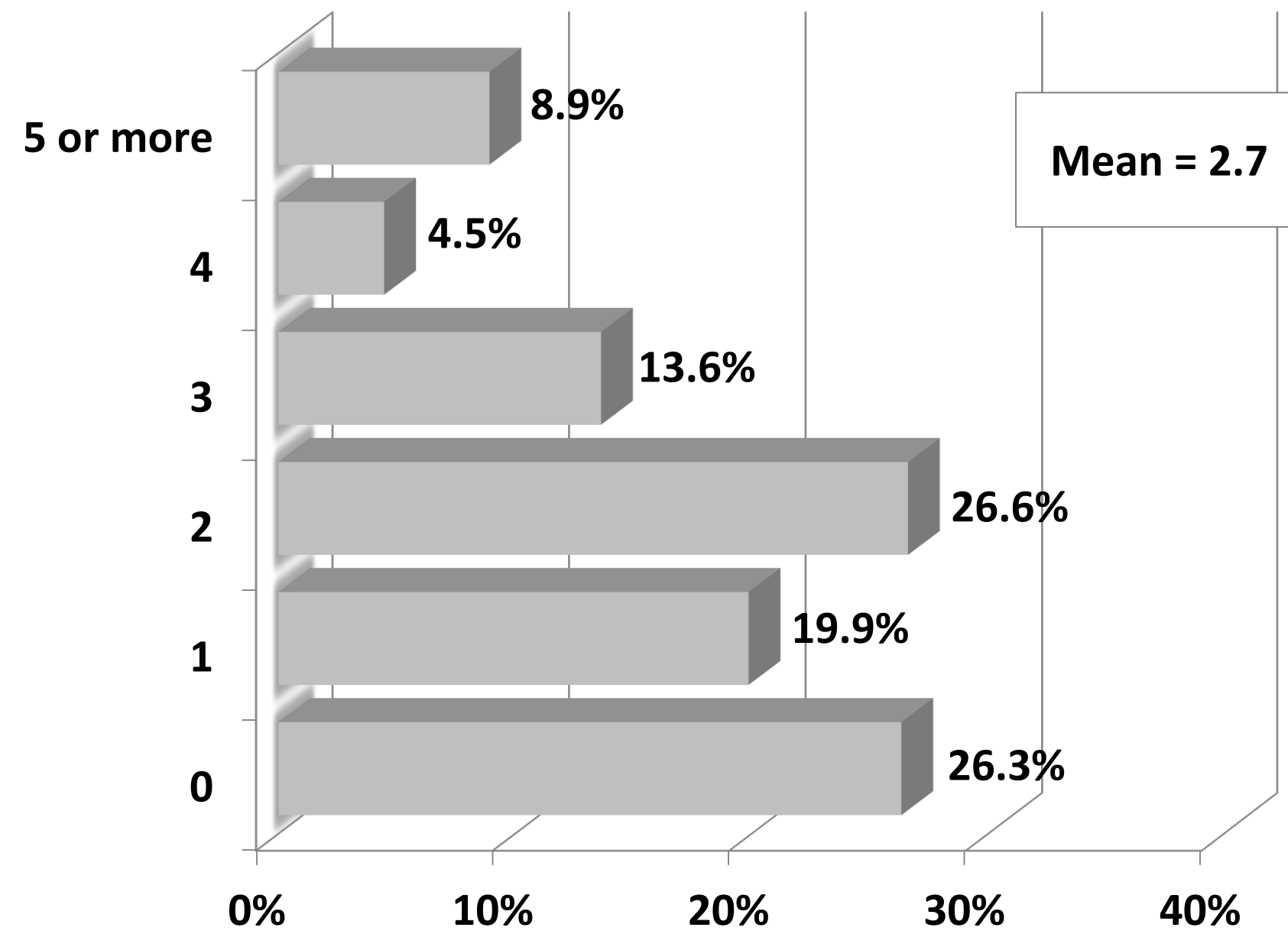
Question: How many total days and nights did you stay in Monterey County?

Base: All respondents. 1240 completed surveys.

# Nights in Monterey County

The average Monterey County visitor surveyed spent 2.7 nights in the county during their trip.

Chart 6: Nights in Monterey County



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
5 or more	8.5%	15.2%	0.0%
4	5.3%	10.6%	0.0%
3	18.5%	16.7%	0.0%
2	38.6%	30.3%	0.0%
1	27.2%	19.7%	0.0%
0	1.8%	6.1%	100%
<b>Mean</b>	<b>2.5</b>	<b>5.2</b>	<b>0.0</b>
<b>Base</b>	<b>823</b>	<b>66</b>	<b>245</b>

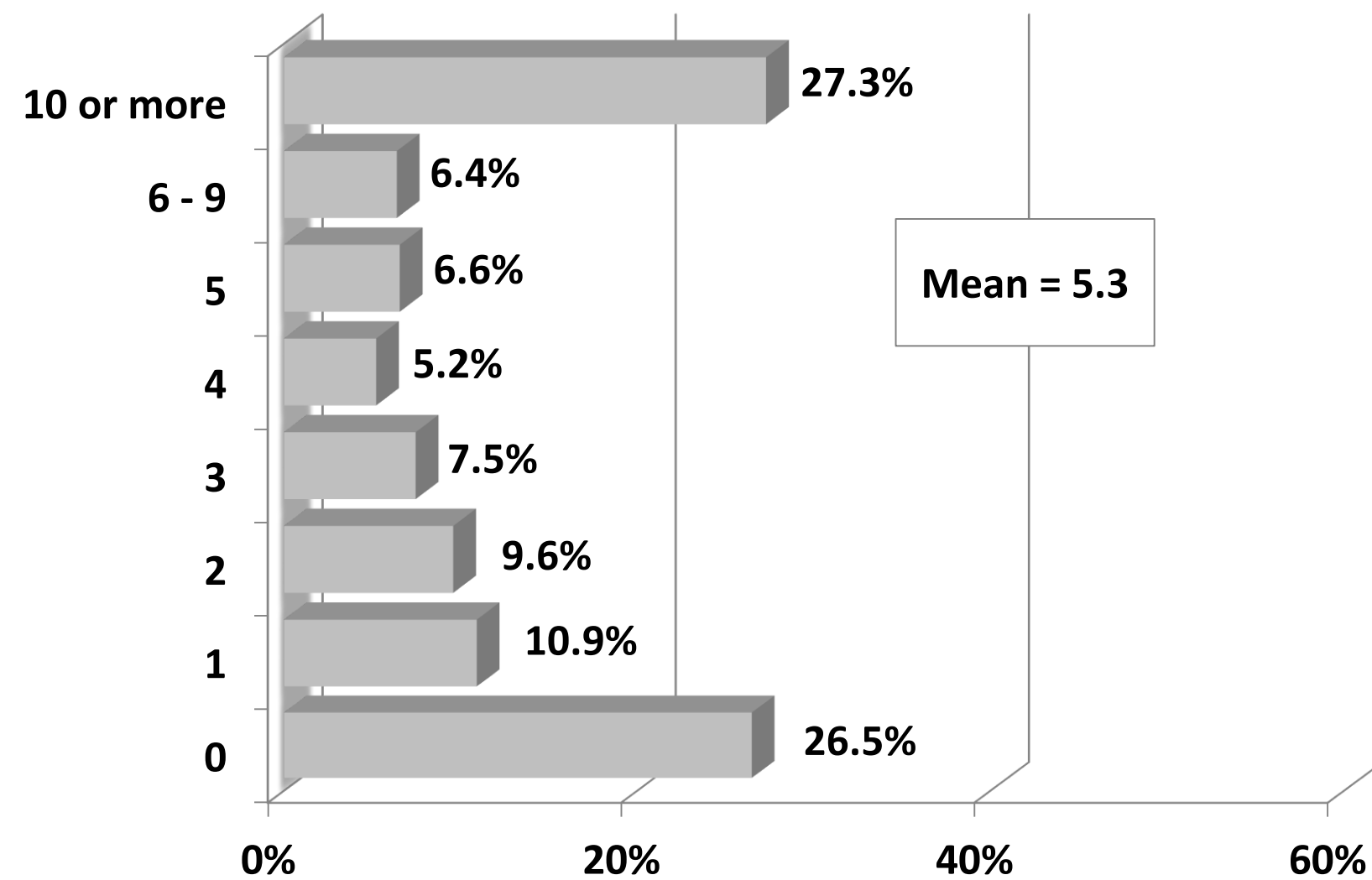
Question: How many total days and nights did you stay in Monterey County?

Base: All respondents. 1240 completed surveys.

# Past Visitation to Monterey County

Nearly three-quarters of those who traveled to Monterey County in 2016 are repeat visitors (73.5%). In fact, one-quarter had been to Monterey County 10 or more times (27.3%). Prior to their most recent trip to the county, visitors had been to Monterey County an average of 5.3 times. Day-trippers had the most experience with Monterey County and both day-trippers and lodging guests were likely to be first time visitors (29.2% and 27.0%, respectively ).

Chart 7: Past Visitation to Monterey County



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

Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
10 or more	25.1%	32.1%	33.2%
6 - 9	7.7%	1.9%	5.0%
5	7.2%	5.7%	6.4%
4	5.9%	7.5%	3.5%
3	6.6%	9.4%	5.9%
2	9.5%	9.4%	8.4%
1	11.0%	15.1%	8.4%
0	27.0%	18.9%	29.2%
<b>Mean</b>	<b>5.2</b>	<b>5.2</b>	<b>6.0</b>
<b>Base</b>	<b>780</b>	<b>60</b>	<b>244</b>

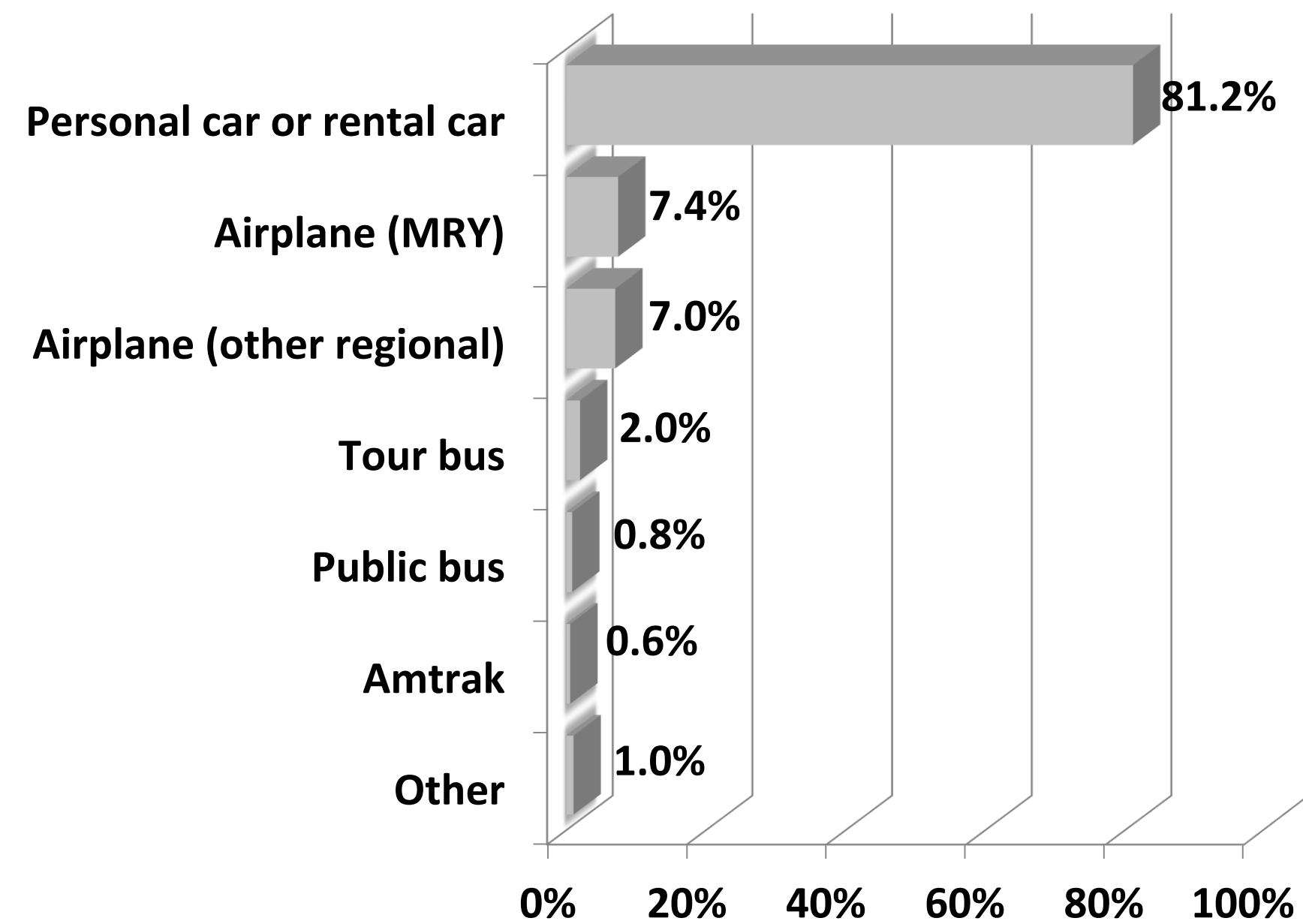
Base: All respondents. 1183 completed surveys.



# Method of Arrival

Over 80 percent of visitors surveyed arrived to the Monterey County area by automobile (81.2%). The next most common method of arrival was through an airplane (14.4%)—with 7.4 percent of these visitors arriving at the Monterey Regional Airport (MRA) and 7.0 percent arriving through another regional airport.

Chart 8: Method of Arrival



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

Detail by Type of Visitor

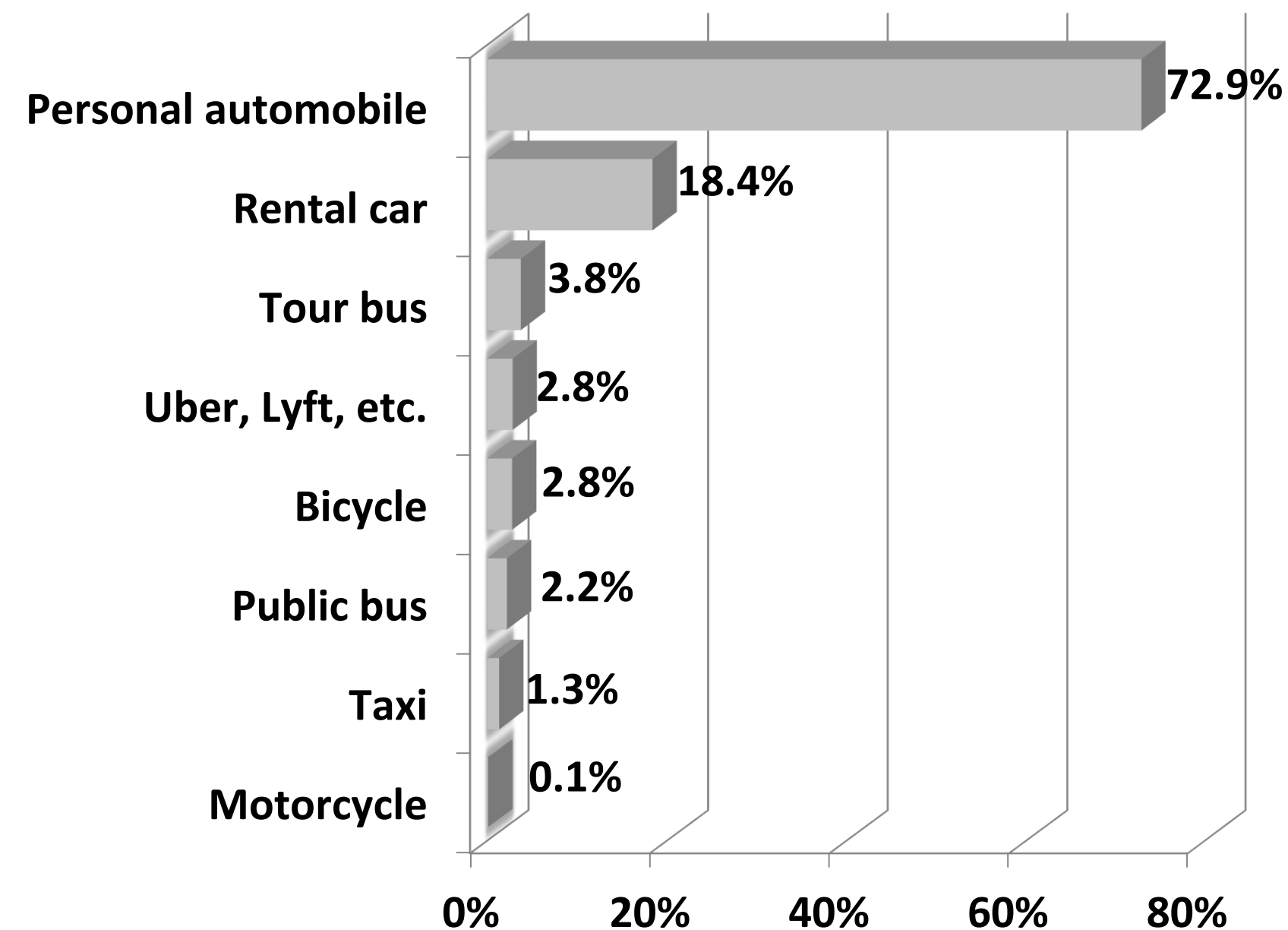
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Personal car or rental car	80.0%	71.6%	88.0%
Airplane (MRY)	7.9%	16.4%	3.3%
Airplane (other regional)	9.0%	7.5%	2.6%
Tour bus	0.8%	0.0%	5.1%
Public bus	0.7%	3.0%	0.4%
Amtrak	0.6%	1.5%	0.4%
Other	0.8%	0.0%	0.4%
<b>Base</b>	<b>831</b>	<b>67</b>	<b>274</b>

Base: All respondents. 1291 completed surveys.

# Modes of Transportation

**Nine-in-ten visitors surveyed either used a personal or a rental vehicle while in Monterey County (91.0%).** In addition, a combined 3.9 percent used a ride-sharing service (Uber, Lyft) or a taxi, while 3.8 percent were on a tour bus and 2.8 percent rode a bicycle while visiting Monterey County. Compared to other visitor types, hotel guest visitors were more likely to use a rental car (24.2%).

**Chart 9: Modes of Transportation**



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

**Detail by Type of Visitor**

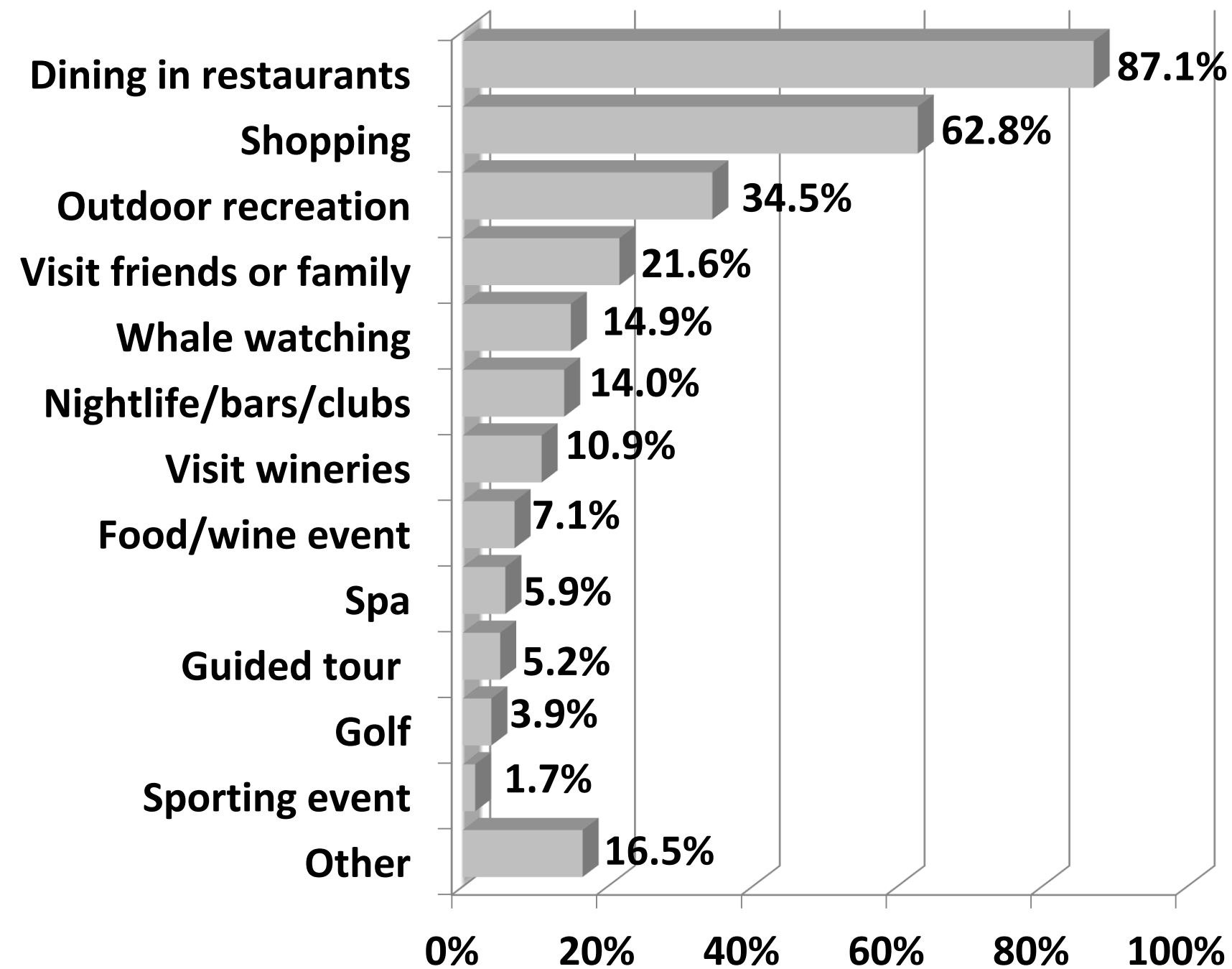
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Personal automobile	67.6%	73.1%	81.7%
Rental car	24.2%	19.4%	7.2%
Tour bus	2.7%	0.0%	7.2%
Uber, Lyft, etc.	3.4%	7.5%	0.0%
Bicycle	2.7%	7.5%	0.7%
Public bus	2.5%	4.5%	1.1%
Taxi	2.4%	1.5%	0.0%
Motorcycle	0.2%	0.0%	0.0%
<b>Base</b>	<b>850</b>	<b>67</b>	<b>278</b>

Base: All respondents. 1313 completed surveys.

# Activities in Monterey County

While Monterey County’s visitors participate in a variety of activities during their trip, dining in restaurants and shopping remain the most ubiquitous. In addition, over one third of visitors also engaged in activities related to outdoor recreation (34.5%).

Chart 10: Activities in Monterey County



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

Detail by Type of Visitor

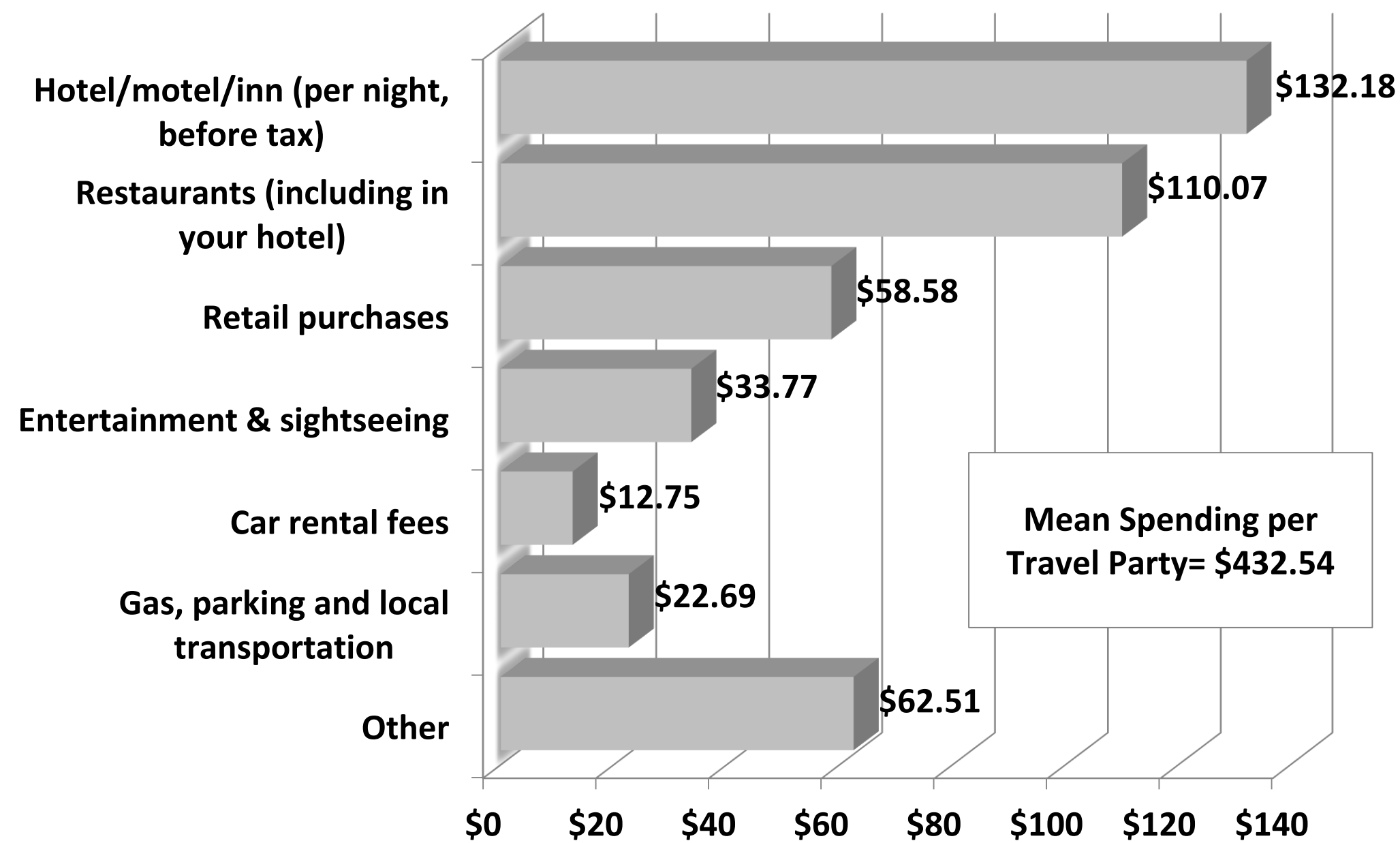
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Dining in restaurants	89.4%	83.6%	84.5%
Shopping	64.5%	61.2%	59.0%
Outdoor recreation	36.5%	43.3%	26.3%
Visit friends or family	17.0%	71.6%	12.6%
Whale watching	15.0%	26.9%	10.1%
Nightlife/bars/clubs	16.8%	22.4%	5.0%
Visit wineries	11.8%	16.4%	5.0%
Food/wine event	7.3%	14.9%	2.9%
Spa	7.4%	7.5%	1.4%
Guided tour	5.4%	6.0%	5.0%
Golf	4.8%	6.0%	1.1%
Sporting event	1.3%	3.0%	0.4%
Other	17.3%	9.0%	18.3%
<b>Base</b>	<b>849</b>	<b>67</b>	<b>278</b>

Base: All respondents. 1313 completed surveys.

# Spending Per Day, Per Travel Party

In 2016, visiting travel parties to Monterey County spent **\$432.54 per day during their trip**. A majority of this spending is attributed to accommodations (\$132.18 across all visitor segments – Hotel guests spent an average of \$221.64 for lodging) and restaurants (\$110.07). Retail store purchases (\$58.58) and entertainment and sightseeing (\$33.77) were also top expenditures. Lodging guests spend more than other visitor types, averaging \$552.21 per day, per travel party.

**Chart 11: Spending Per Day, Per Travel Party**



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

**Detail by Type of Visitor**

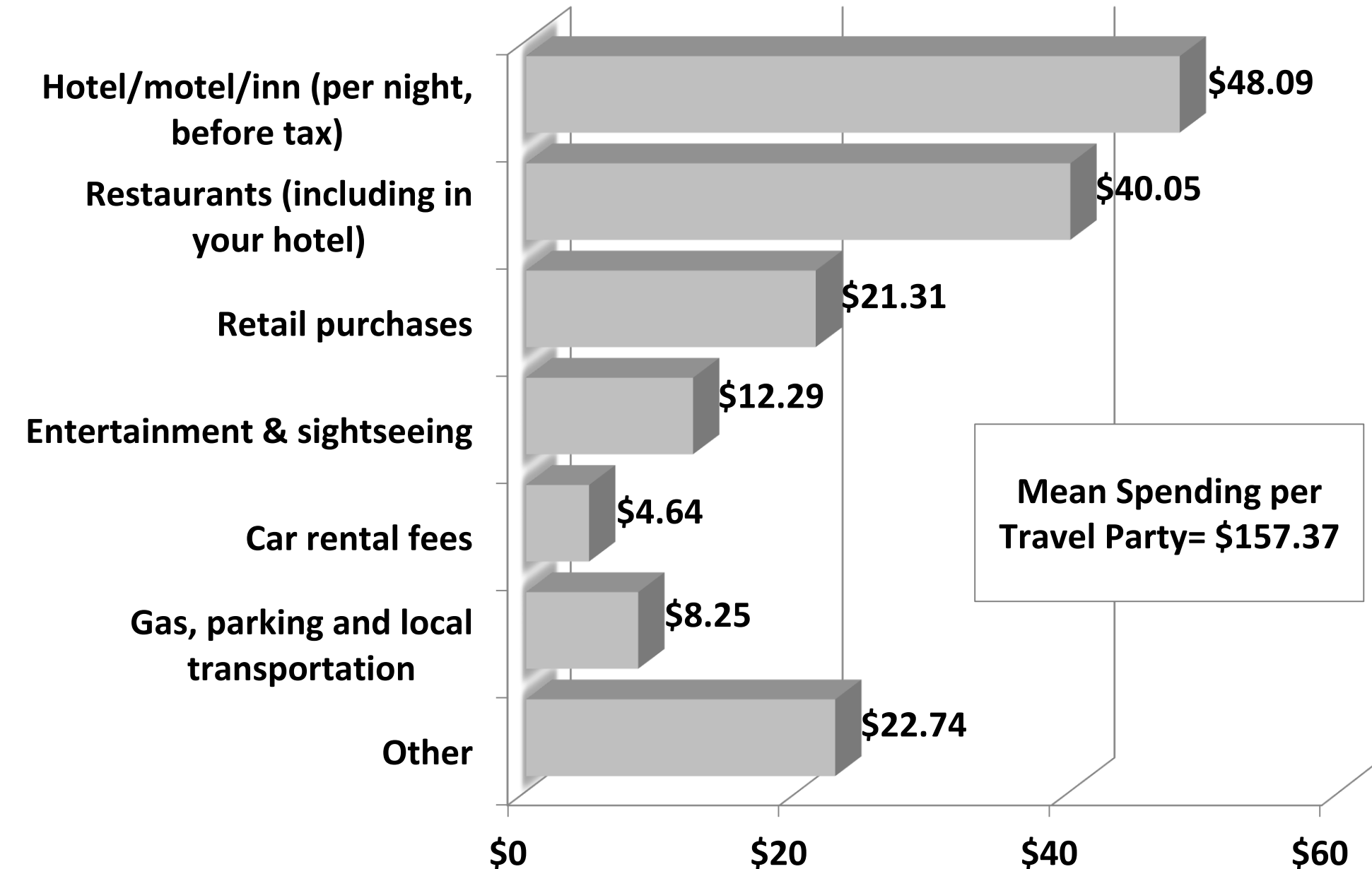
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Hotel/motel/inn	\$221.64	--	--
Restaurants	\$128.29	\$122.05	\$75.53
Retail purchases	\$64.64	\$63.43	\$38.79
Entertainment & sightseeing	\$35.62	\$51.94	\$21.82
Gas, parking and local transportation	\$17.61	\$13.69	\$2.57
Car rental fees	\$27.91	\$20.38	\$16.59
Other	\$56.49	\$44.23	\$40.82
<b>Mean Spending Per Day, Per Travel Party</b>	<b>\$552.21</b>	<b>\$315.72</b>	<b>\$196.13</b>
<b>Base</b>	<b>803</b>	<b>65</b>	<b>268</b>

Base: All respondents. 1252 completed surveys.

# Spending Per Day, Per Person

It is estimated that the average Monterey County visitor represented \$157.37 in daily spending in the county. This is based on the reported daily spending of \$432.54 covering an average of 2.8 travelers.

**Chart 12: Spending Per Day, Per Person**



**Detail by Type of Visitor**

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Hotel/motel/inn	\$91.16	--	--
Restaurants	\$52.77	\$51.80	\$23.12
Retail purchases	\$26.59	\$26.92	\$11.87
Entertainment & sightseeing	\$14.65	\$22.05	\$6.68
Car rental fees	\$7.24	\$5.81	\$0.79
Gas, parking and local transportation	\$11.48	\$8.65	\$5.08
Other	\$23.24	\$18.77	\$12.49
<b>Mean Spending Per Day, Per Person</b>	<b>\$227.12</b>	<b>\$134.01</b>	<b>\$60.02</b>
<b>Mean Travelers Covered by Spending</b>	<b>2.4</b>	<b>2.4</b>	<b>3.3</b>
<b>Base</b>	<b>803</b>	<b>65</b>	<b>268</b>

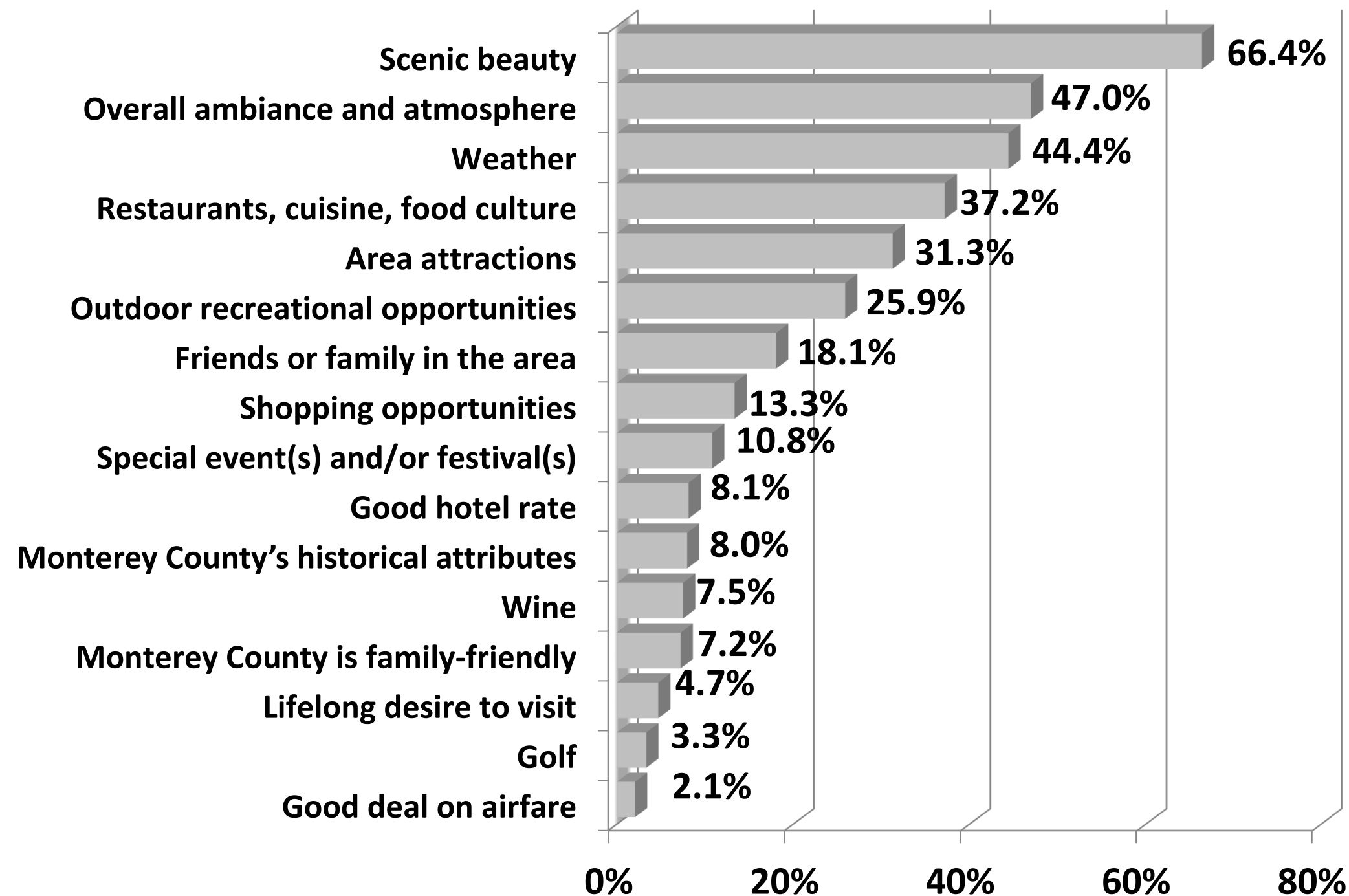
Question: These expenses fully covered how many people (including yourself)?

Base: All respondents. 1252 completed surveys.

# Important Factors to Destination Decision

In total, two-thirds of visitors reported that scenic beauty was important to their decision to travel to Monterey County (66.4%). Other factors that were most important to visitors' decision to visit the county include Monterey County's overall ambiance (47.0%), weather (44.4%), restaurants/cuisine (37.2%), area attractions (31.3%) and outdoor recreational opportunities (25.9%).

**Chart 13: Important Factors to Destination Decision**



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

**Detail by Type of Visitor**

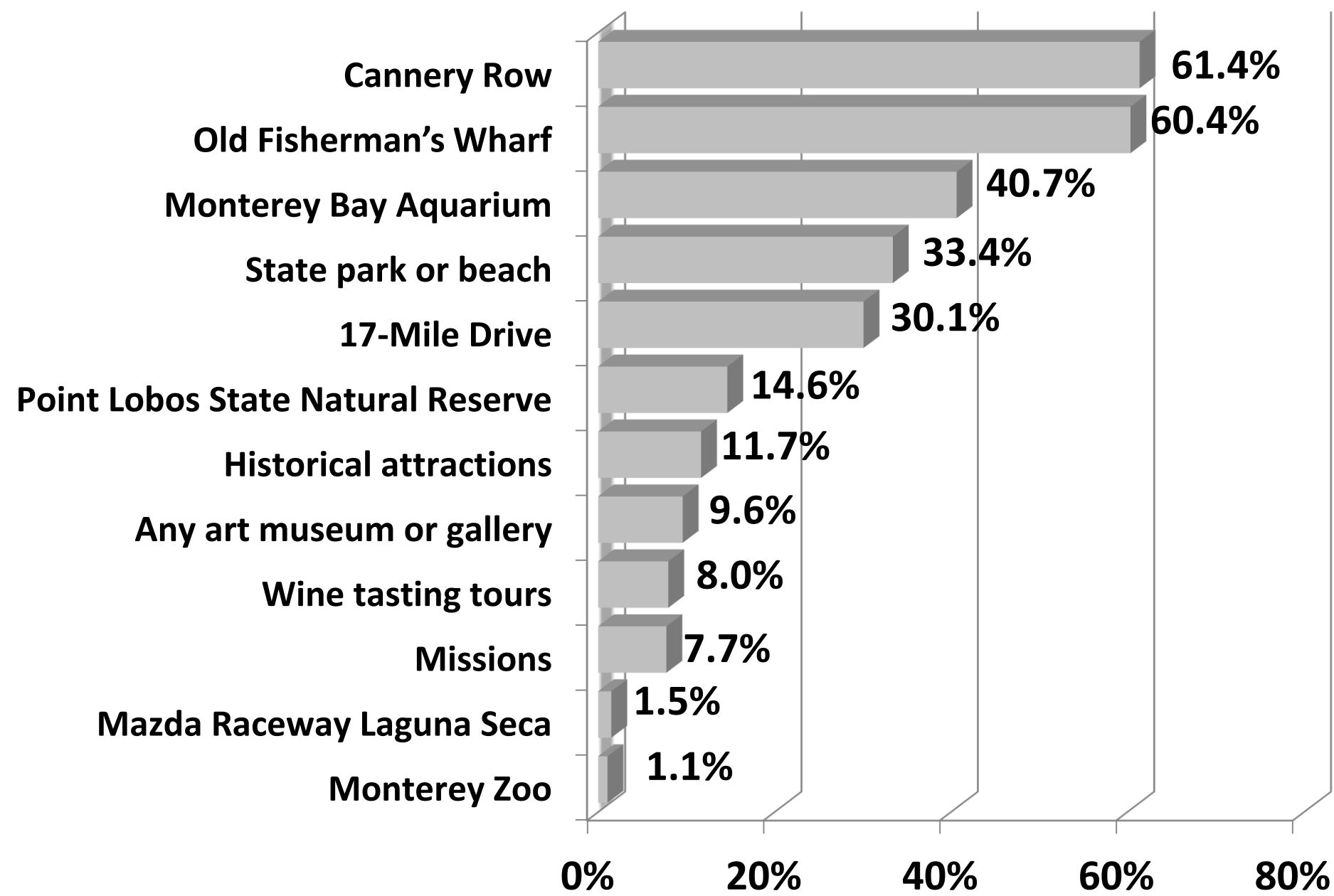
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Scenic beauty	68.0%	58.2%	66.2%
Overall ambiance and atmosphere	49.7%	41.8%	43.2%
Weather	40.8%	47.8%	49.3%
Restaurants, cuisine, food culture	36.0%	32.8%	41.4%
Area attractions	30.2%	11.9%	36.7%
Outdoor recreational opportunities	26.0%	29.9%	24.1%
Friends or family in the area	13.4%	67.2%	10.4%
Shopping opportunities	12.8%	14.9%	12.9%
Special event(s) and/or festival(s)	14.4%	6.0%	4.3%
Good hotel rate	15.1%	0.0%	0.4%
Monterey County's historical attributes	9.3%	10.4%	3.2%
Wine	8.4%	13.4%	4.3%
Monterey County is family-friendly	7.4%	3.0%	5.8%
Lifelong desire to visit	6.0%	3.0%	2.5%
Golf	3.7%	4.5%	1.8%
Good deal on airfare	2.9%	0.0%	0.7%
<b>Base</b>	<b>849</b>	<b>67</b>	<b>278</b>

Base: All respondents. 1313 completed surveys.

# Attractions Visited

**Cannery Row (61.4%) and Old Fisherman’s Wharf (60.4%) were the most frequented of the attractions tested in this research.** Presented with a list of twelve Monterey County attractions, respondents identified those which they visited—or planned to—during their trip. In addition to Cannery Row and Old Fisherman’s Wharf, other top attractions reported amongst visitors were the Monterey Bay Aquarium (40.7%), state parks/beaches (33.4%) and driving all or part of the 17-Mile drive (30.1%).

**Chart 14: Attractions Visited**



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

**Detail by Type of Visitor**

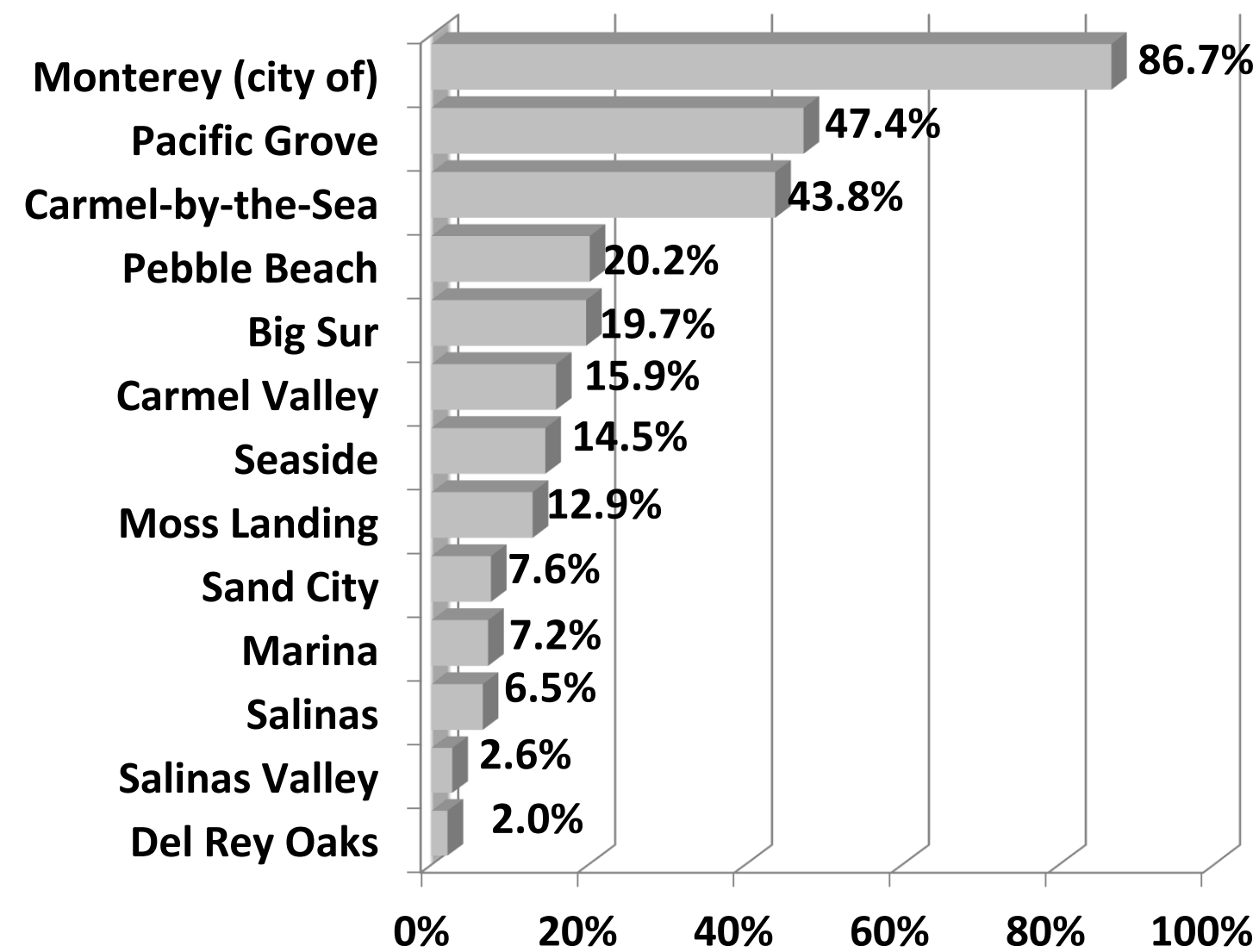
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Cannery Row	61.0%	62.7%	61.9%
Old Fisherman’s Wharf	60.2%	76.1%	56.1%
Monterey Bay Aquarium	40.0%	40.3%	37.8%
State park or beach	37.0%	47.8%	19.8%
17-Mile Drive	36.2%	34.3%	17.3%
Point Lobos State Natural Reserve	15.1%	29.9%	5.8%
Historical attractions	12.2%	20.9%	5.0%
Any art museum or gallery	11.9%	17.9%	2.9%
Wine tasting tours	8.7%	10.4%	4.0%
Missions	8.5%	9.0%	2.9%
Mazda Raceway Laguna Seca	1.5%	3.0%	0.0%
Monterey Zoo	1.2%	1.5%	0.4%
<b>Base</b>	<b>849</b>	<b>67</b>	<b>278</b>

Base: All respondents. 1313 completed surveys.

# Monterey County Areas Visited

The city of Monterey was the county's most accessed area by visitors during their Monterey County trips (86.7%). Survey respondents were provided with a list of Monterey County areas and were asked where they visited or were planning to visit while on their trip. Pacific Grove (47.4%) and Carmel-by-the-Sea (43.8%) followed the city of Monterey as some of the most trafficked regions of the County by visitors.

Chart 15: Monterey County Areas Visited



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

Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Monterey (city of)	86.2%	82.5%	88.4%
Pacific Grove	51.7%	54.0%	33.3%
Carmel-by-the-Sea	48.3%	49.2%	29.5%
Pebble Beach	24.3%	28.6%	10.5%
Big Sur	22.0%	23.8%	9.7%
Carmel Valley	18.6%	25.4%	5.4%
Seaside	15.7%	22.2%	8.5%
Moss Landing	10.1%	22.2%	9.3%
Sand City	6.7%	14.3%	4.7%
Marina	5.8%	11.1%	4.7%
Salinas	5.2%	17.5%	3.9%
Salinas Valley	2.5%	11.1%	1.2%
Del Rey Oaks	2.2%	9.5%	0.4%
<b>Base</b>	<b>773</b>	<b>63</b>	<b>258</b>

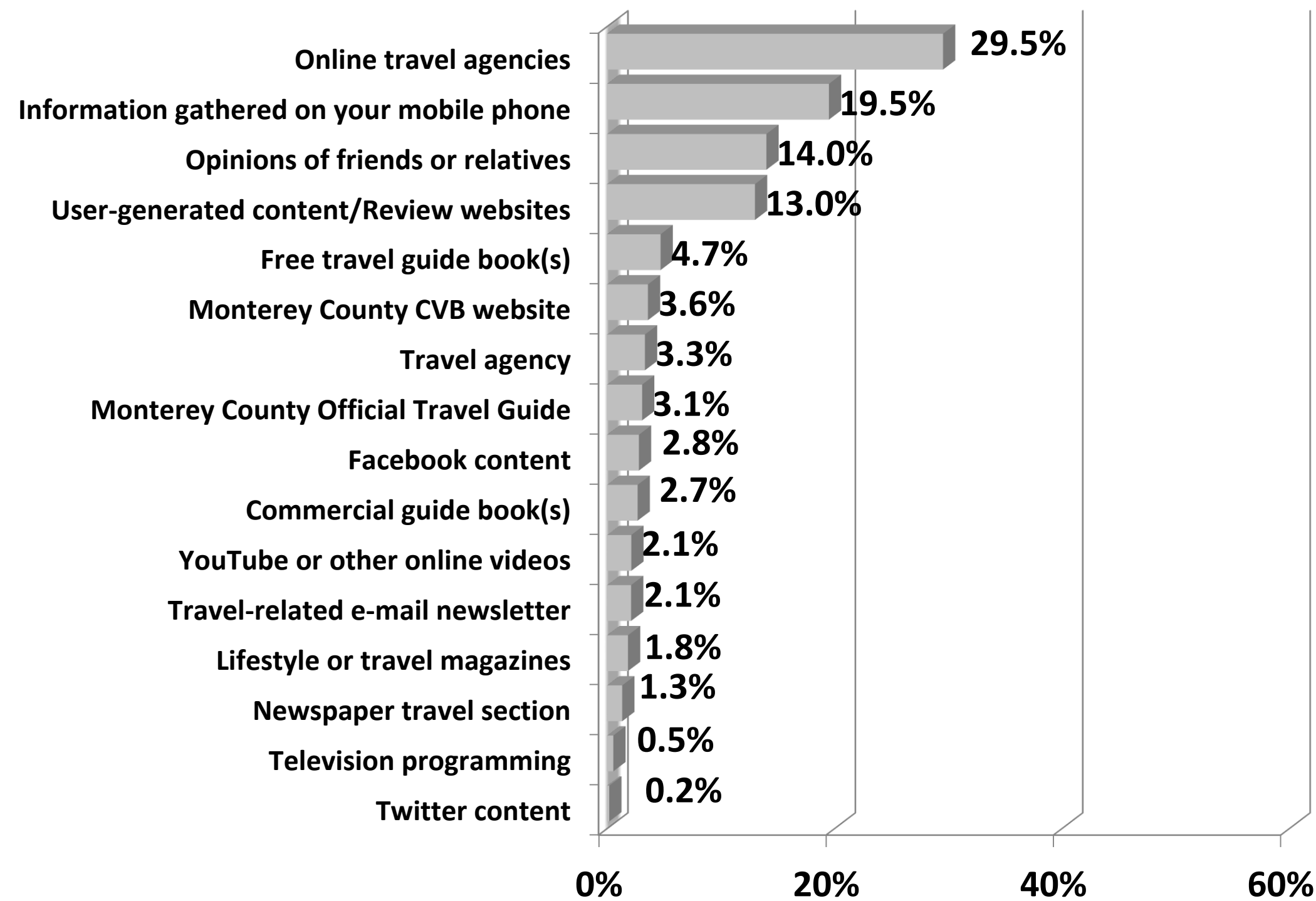
Base: All respondents. 1212 completed surveys.



# Resources Used Before Arrival

Before arriving in Monterey County, 29.5 percent of visitors used online travel agencies to plan their trip. This was followed by information gathered on a mobile phone (19.5%), opinions of friends or relatives (14.0%) and/or user-generated content/review websites (13.0%). In total, 5.7 percent utilized Monterey County CVB resources, of which 3.6 percent utilized the official Monterey County CVB website and 3.1 percent utilized the Monterey County Official Travel Guide.

Chart 16: Resources Used Before Arrival



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Online travel agencies	38.2%	23.9%	18.3%
Information gathered on your mobile phone	21.0%	17.9%	17.6%
Opinions of friends or relatives	12.8%	31.3%	10.1%
User-generated content/Review websites	16.5%	10.4%	4.7%
Free travel guide book(s)	6.6%	9.0%	0.4%
Monterey County CVB's website	5.7%	0.0%	1.4%
Travel agency	3.5%	3.0%	3.6%
Monterey County Official Travel Guide	3.8%	6.0%	1.4%
Facebook content	2.8%	4.5%	2.2%
Commercial guide book(s)	3.9%	3.0%	0.7%
YouTube or other online videos	2.6%	3.0%	1.1%
Travel-related e-mail newsletter	3.9%	0.0%	0.4%
Lifestyle or travel magazines	2.0%	1.5%	0.4%
Newspaper travel section	1.9%	1.5%	0.0%
Television programming	0.6%	1.5%	0.0%
Twitter content	0.4%	0.0%	0.0%
<b>Base</b>	<b>849</b>	<b>67</b>	<b>278</b>

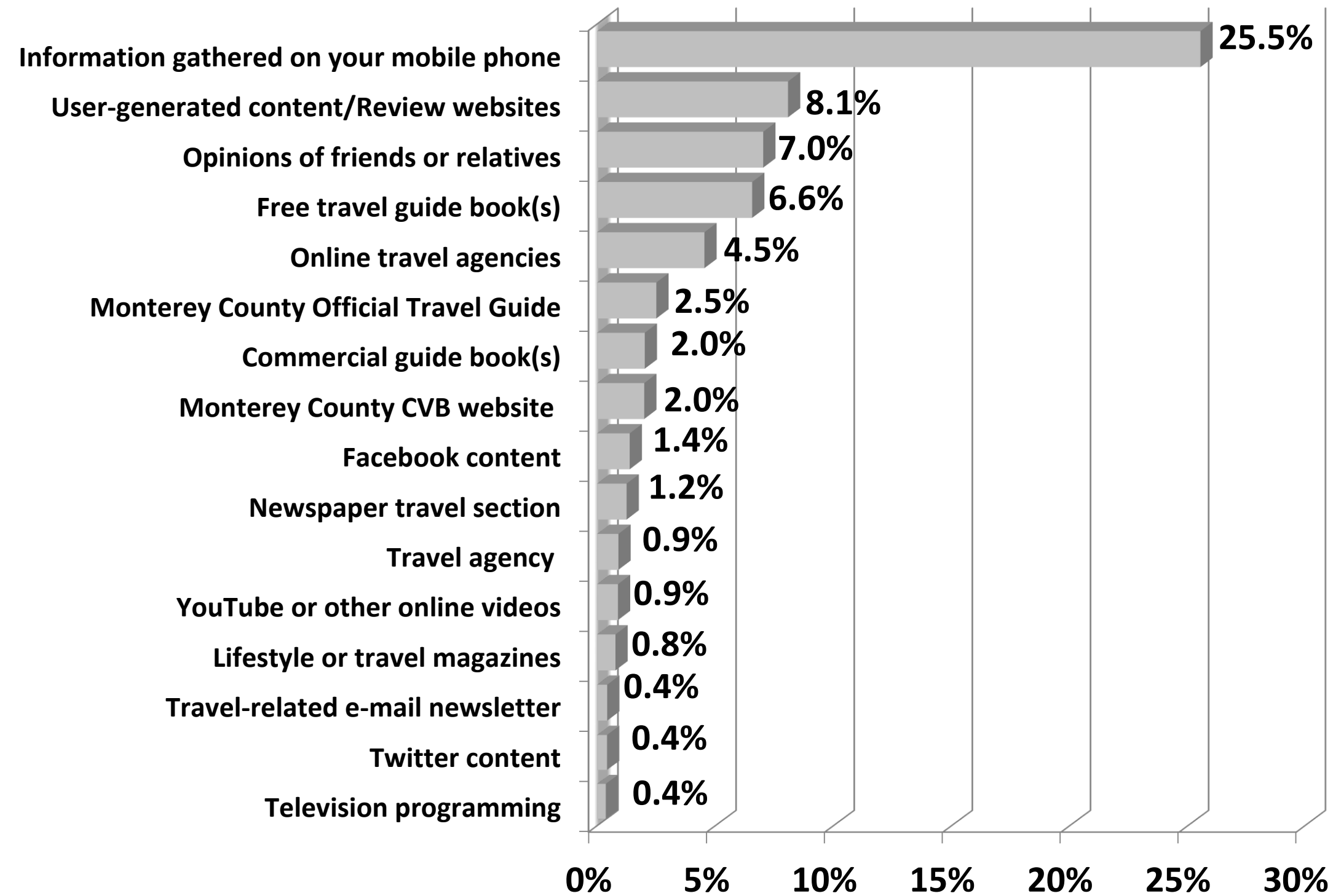
Question: Which of the following resources did you use to plan your Monterey County trip BEFORE ARRIVING and which did you use WHILE IN THE COUNTY? (Select all that apply)

Base: All respondents. 1313 completed surveys.

# Resources Used In-Market

While in Monterey County, a quarter of visitors used their mobile phone specifically for trip planning purposes (25.5%). While trip planning resource usage declines overall while visitors are in-market, user-generated content/review websites (8.1%) and opinions of friends/relatives (7.0%) remain the top ones tapped. 2.5 percent of visitors surveyed accessed the Monterey County Official Travel Guide in-market. In total, 3.8 percent utilized Monterey County CVB resources (Official Travel Guide and website).

**Chart 17: Resources Used 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? (Select all that apply)

## Detail by Type of Visitor

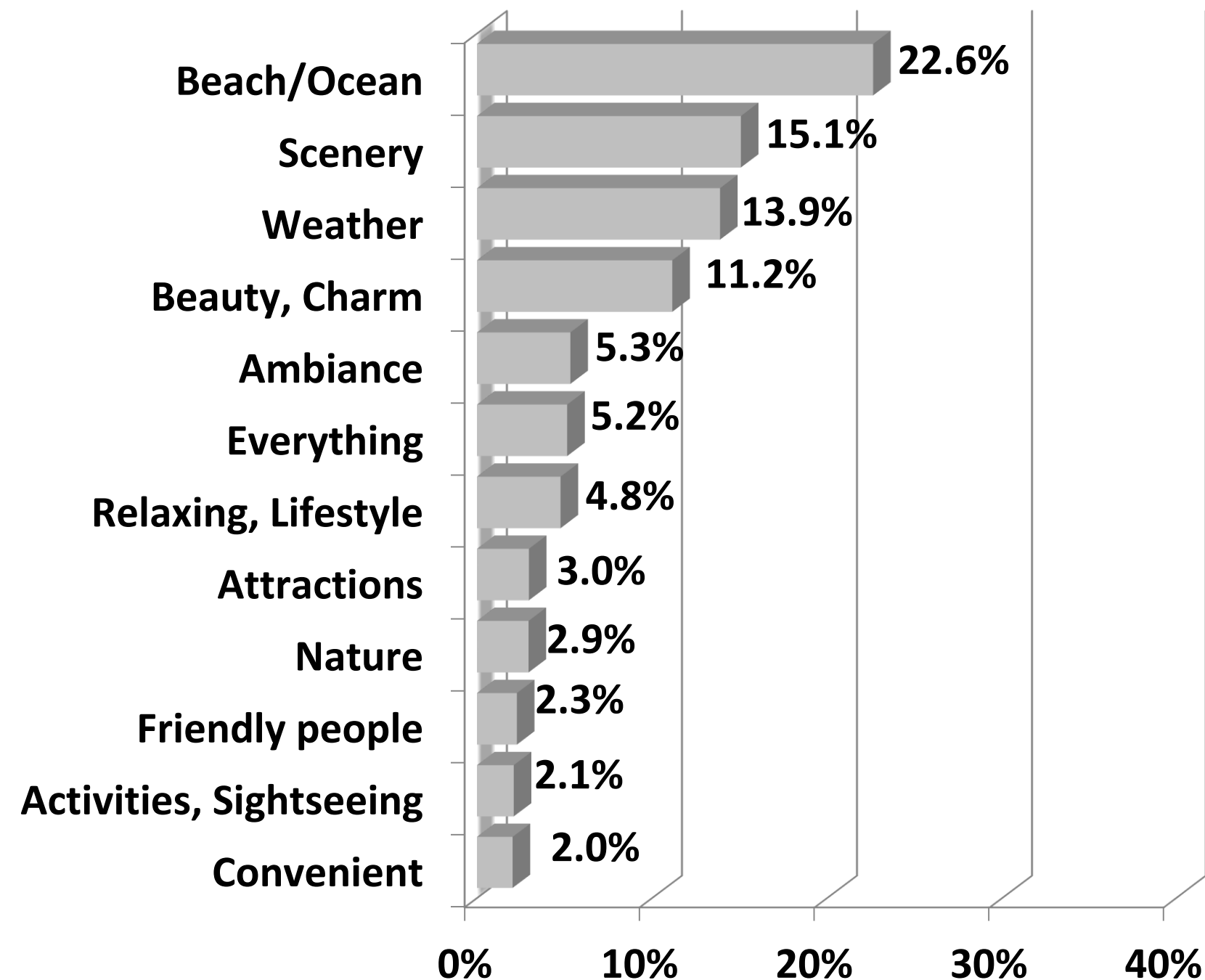
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Information gathered on your mobile phone	25.4%	29.9%	21.9%
User-generated content/Review websites	10.1%	7.5%	3.2%
Opinions of friends or relatives	5.8%	16.4%	4.3%
Free travel guide book(s)	9.8%	7.5%	0.7%
Online travel agencies	6.8%	3.0%	1.1%
Monterey County Official Travel Guide	3.3%	3.0%	0.4%
Commercial guide book(s)	2.8%	0.0%	0.4%
Monterey County CVB's website	3.4%	0.0%	0.0%
Facebook content	1.8%	1.5%	0.0%
Newspaper travel section	1.5%	3.0%	0.4%
Travel agency	1.2%	0.0%	1.1%
YouTube or other online videos	1.1%	1.5%	0.4%
Lifestyle or travel magazines	1.1%	0.0%	0.0%
Travel-related e-mail newsletter	0.8%	0.0%	0.0%
Twitter content	0.6%	0.0%	0.0%
Television programming	0.5%	1.5%	0.0%
<b>Base</b>	<b>849</b>	<b>67</b>	<b>278</b>

Base: All respondents. 1313 completed surveys.

# 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 below. The beach/ocean (22.6%), scenery (15.1%), great weather (13.9%) and the beauty and charm of the area (11.2%) were listed as the most liked aspects in Monterey County.

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



Question: What do you like most about Monterey County?

Detail by Type of Visitor

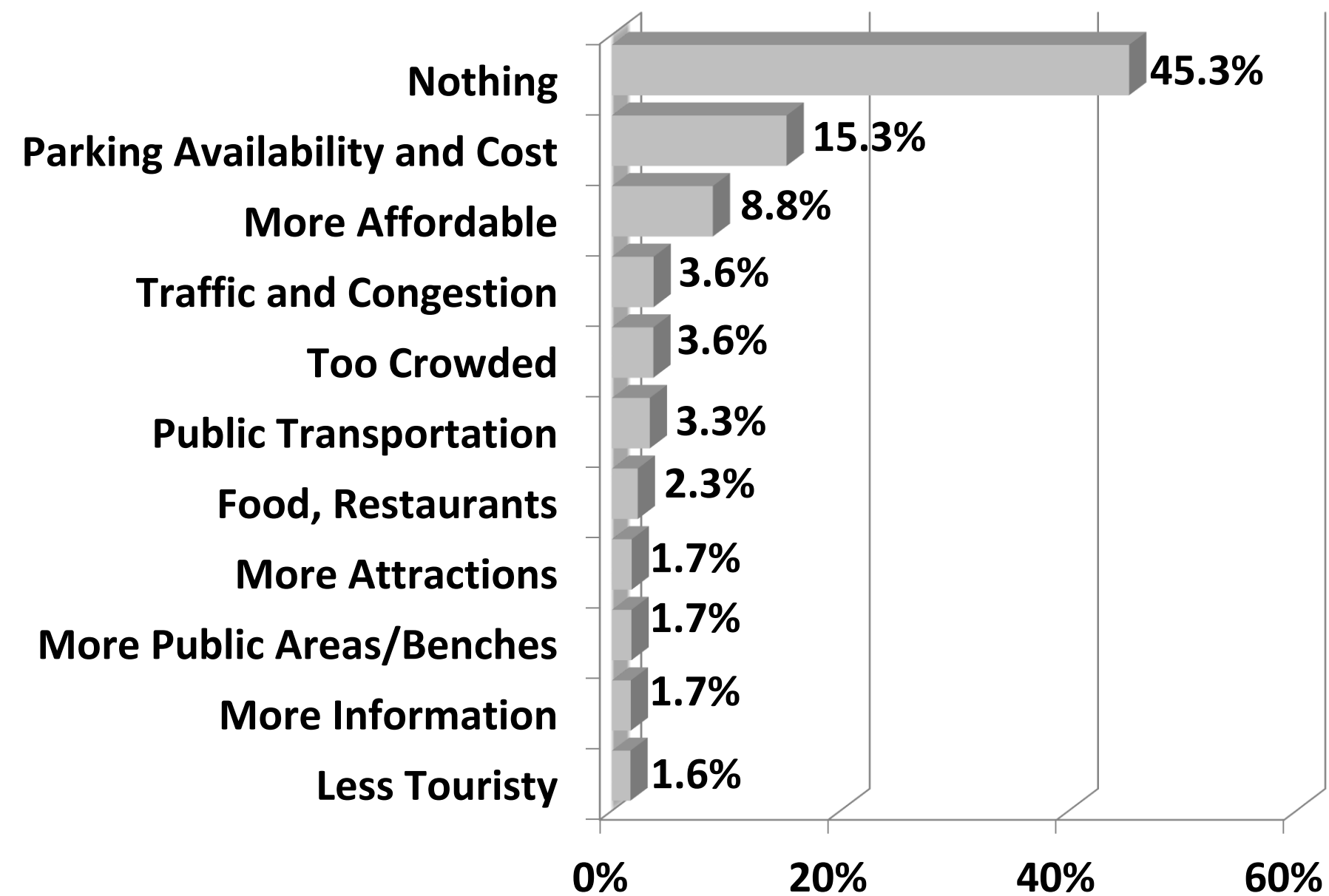
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Beach/Ocean	22.2%	12.7%	23.7%
Scenery	16.1%	12.7%	15.2%
Weather	14.0%	17.5%	13.6%
Beauty, Charm	11.7%	11.1%	10.1%
Ambiance	5.6%	1.6%	6.2%
Everything	5.3%	6.3%	5.1%
Relaxing, Lifestyle	3.9%	7.9%	4.3%
Attractions	3.3%	0.0%	3.1%
Nature	3.9%	4.8%	1.2%
Friendly people	1.7%	6.3%	1.9%
Activities, Sightseeing	1.7%	4.8%	1.9%
Convenient	2.1%	1.6%	2.7%
<b>Base</b>	<b>752</b>	<b>63</b>	<b>257</b>

Base: All respondents. 1192 completed surveys.

# Suggested Improvements for Monterey County

When asked to share what could be added or changed to improve the visitor experience in Monterey County, nearly half of survey respondents said “nothing” (45.3%). The top ten suggested improvements are shown in the chart and table below. Of the specific responses provided, parking availability and cost (15.3%) and the suggestion to make Monterey County more affordable (8.8%) were the top things mentioned to improve the Monterey County visitor experience.

**Chart 19: Suggested Improvements for Monterey County (Unaided)**



Question: What could be added or changed to improve the visitor experience in Monterey County?

**Detail by Type of Visitor**

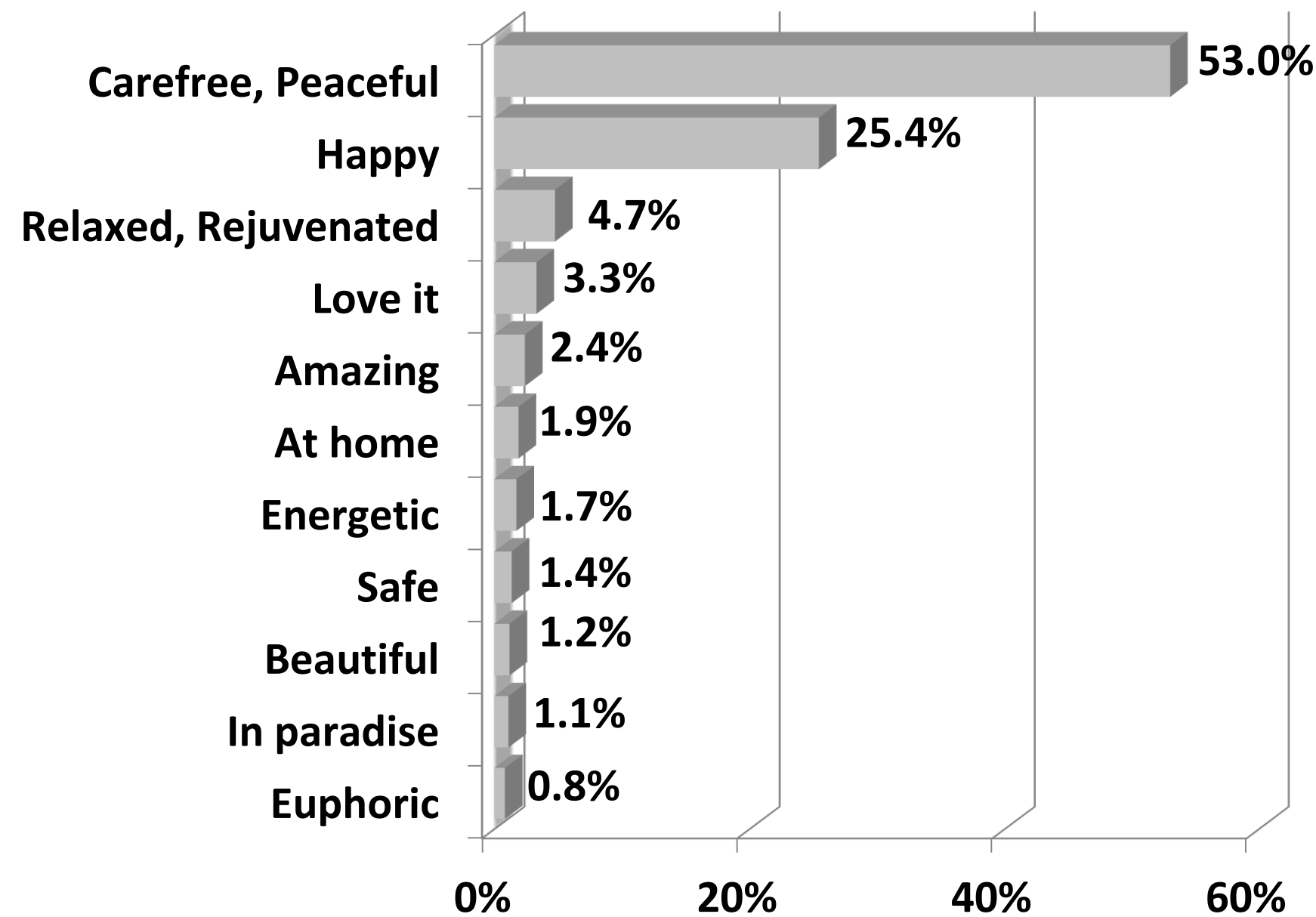
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Nothing	44.2%	46.7%	49.3%
Parking Availability and Cost	12.7%	10.0%	17.0%
More Affordable	10.5%	6.7%	8.1%
Traffic and Congestion	3.8%	5.0%	3.1%
Too Crowded	3.8%	8.3%	2.7%
Public Transportation	4.0%	3.3%	1.8%
Food, Restaurants	2.8%	3.3%	1.3%
More Attractions	1.2%	1.7%	3.1%
More Public Areas/Benches	1.5%	1.7%	1.8%
More Information	2.1%	0.0%	0.9%
Less Touristy	2.0%	1.7%	1.8%
<b>Base</b>	<b>607</b>	<b>60</b>	<b>223</b>

Base: All respondents. 1015 completed surveys.

# Feeling in Monterey County

**Over half of visitors surveyed feel “carefree” and “peaceful” while in Monterey County (53.0%).** In an open-ended question, respondents were asked to state how they feel when in Monterey County. The top ten feelings are shown in the chart and table below. “Carefree” or “peaceful” is, by far, the most common feeling visitors have while in Monterey County . Another one-quarter of visitors cited “happy” as a feeling they get when visiting Monterey County, while 4.7 percent stated they feel “relaxed” or “rejuvenated” being in Monterey County.

**Chart 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**

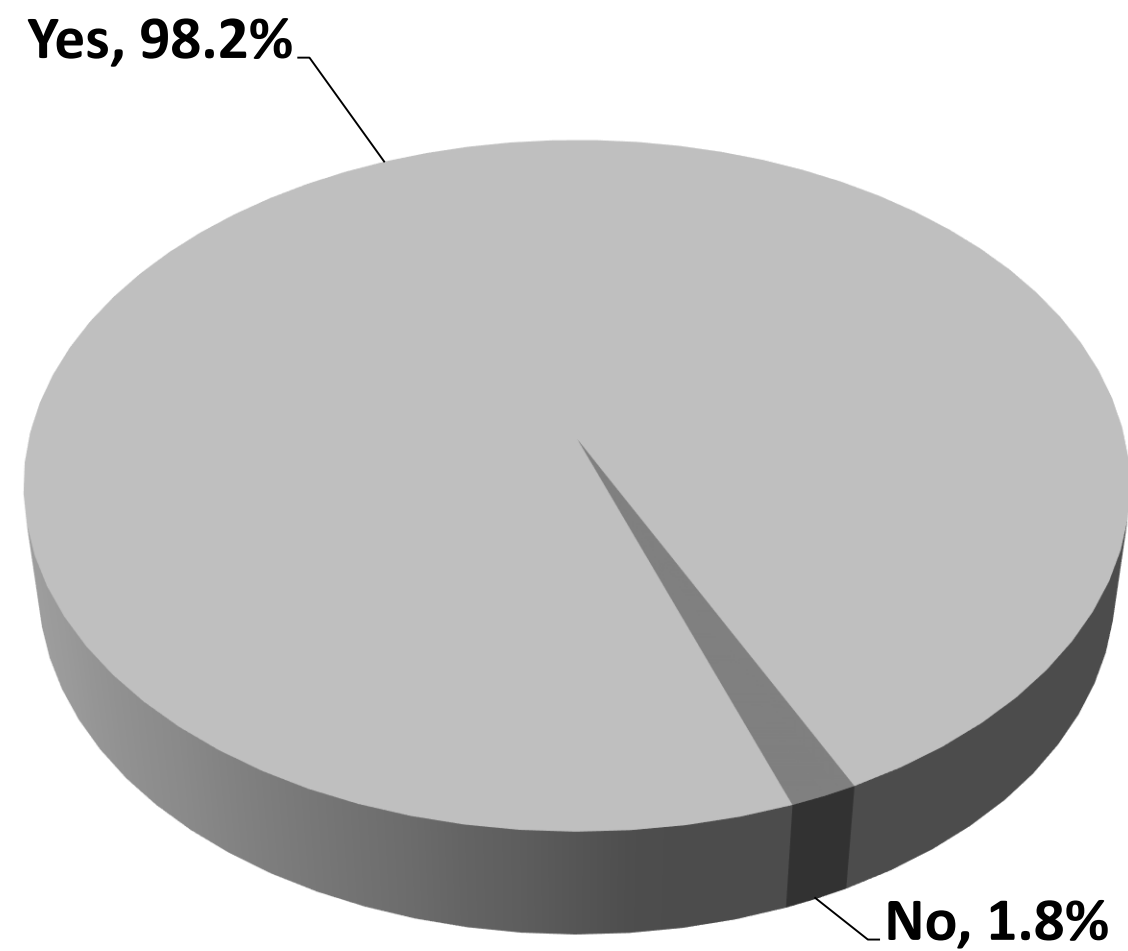
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Carefree, Peaceful	56.3%	43.3%	50.8%
Happy	23.7%	23.3%	29.0%
Relaxed, Rejuvenated	4.5%	5.0%	4.8%
Amazing	2.4%	1.7%	2.8%
Love it	2.1%	3.3%	2.4%
At home	1.7%	5.0%	1.6%
Energetic	1.5%	1.7%	1.6%
Safe	1.1%	3.3%	1.2%
Beautiful	1.1%	1.7%	1.6%
In paradise	0.8%	1.7%	0.8%
Euphoric	0.6%	5.0%	0.8%
Carefree, Peaceful	0.6%	3.3%	0.4%
<b>Base</b>	<b>714</b>	<b>60</b>	<b>252</b>

Base: All respondents. 1145 completed surveys.

# Return to Monterey County

**Monterey County provides a very satisfactory visitor experience.** Nearly all visitors surveyed, 98.2 percent, reported that they would return to Monterey County.

**Chart 21: Return to Monterey County**



Question: Would you return to Monterey County?

**Detail by Type of Visitor**

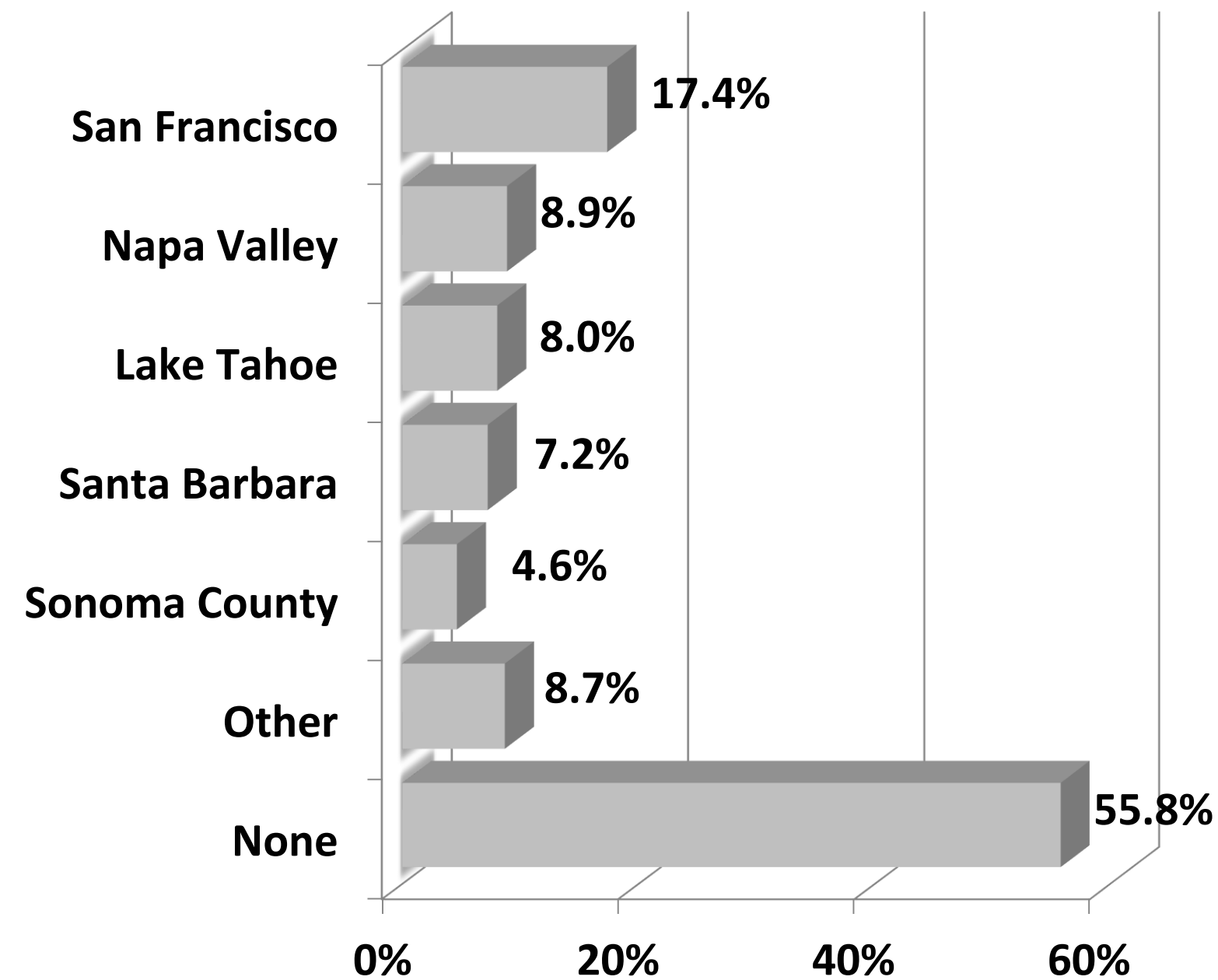
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Yes	97.8%	100.0%	98.4%
No	2.2%	0.0%	1.6%
<b>Base</b>	<b>727</b>	<b>58</b>	<b>247</b>

Base: All respondents. 1150 completed surveys.

# Other Destinations Considered

**Over half of visitors surveyed did not consider any other destinations before deciding to visit Monterey County (55.8%).** Visitors surveyed were presented a list of competitive destinations and asked which of these they also considered before arriving at the decision to visit Monterey County. San Francisco was a top competing destination considered at 17.4 percent, followed by Napa Valley at 8.9 percent and Lake Tahoe at 8.0 percent.

**Chart 22: Return to Monterey County**



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

**Detail by Type of Visitor**

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
San Francisco	20.2%	7.9%	16.3%
Napa Valley	11.8%	4.8%	5.8%
Lake Tahoe	10.6%	6.3%	5.0%
Santa Barbara	10.9%	4.8%	2.3%
Sonoma County	5.8%	3.2%	3.1%
Other	8.6%	3.2%	11.2%
None	50.7%	68.3%	58.9%
<b>Base</b>	<b>743</b>	<b>63</b>	<b>258</b>

Base: All respondents. 1189 completed surveys.



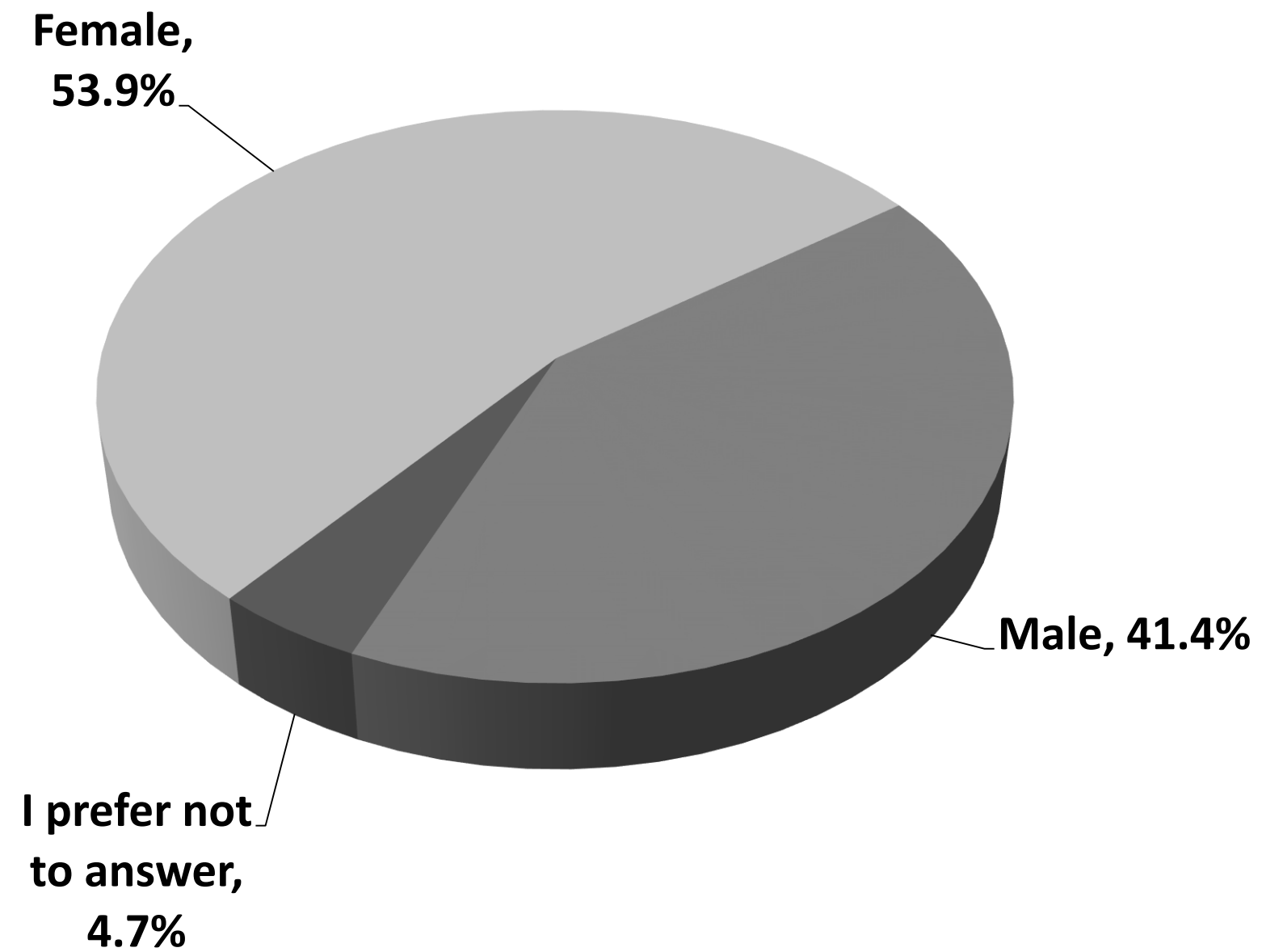
# DEMOGRAPHICS



# Gender

Monterey County visitors surveyed skew slightly female. 53.9 percent are female and 41.4 percent are male.

Chart 23: Gender



Question: What is your gender? (Select one)

Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Female	53.6%	54.8%	52.4%
Male	42.7%	40.3%	40.3%
I prefer not to answer	3.7%	4.8%	7.3%
<b>Base</b>	<b>731</b>	<b>62</b>	<b>248</b>

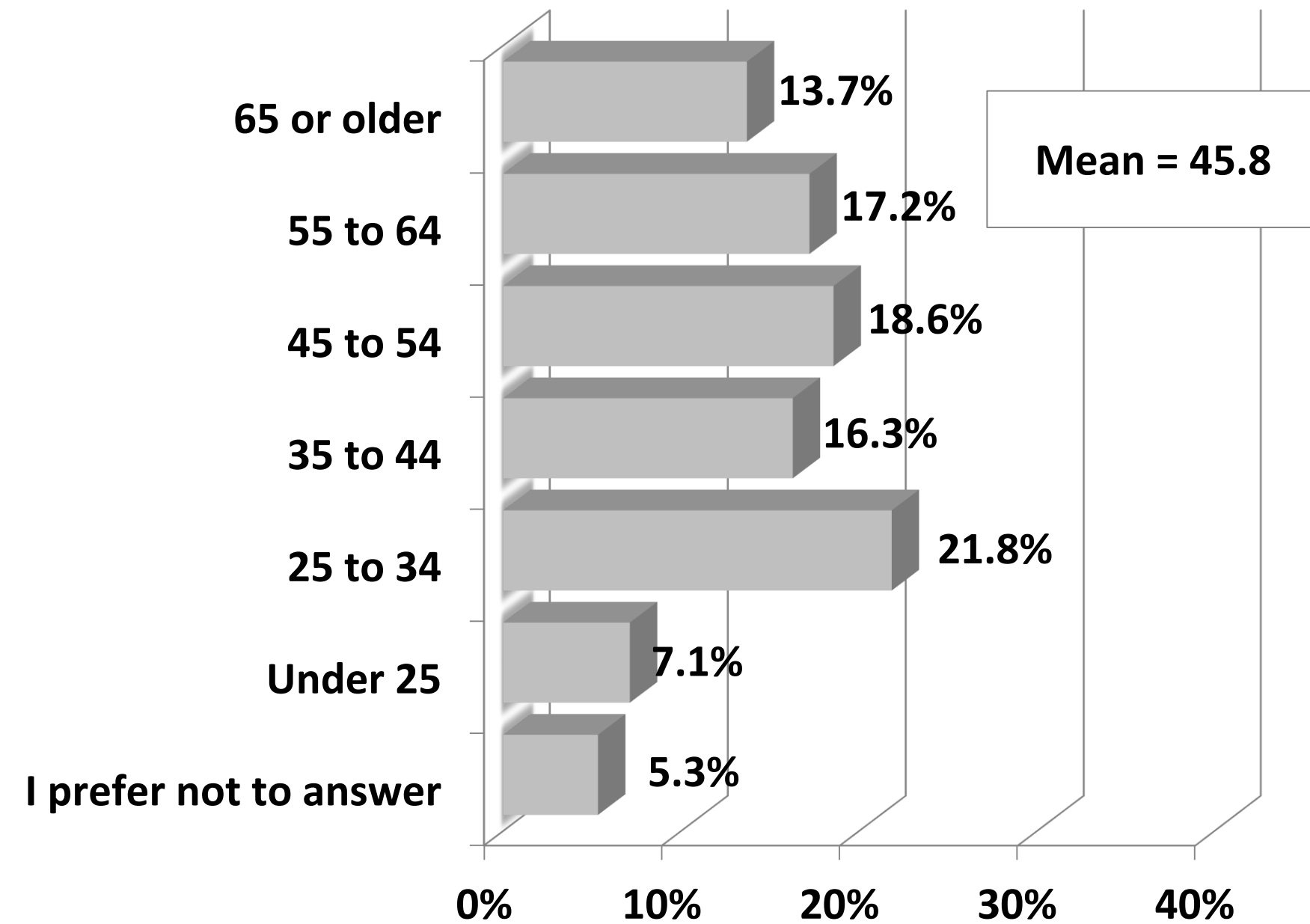
Base: All respondents. 1159 completed surveys.

# Age

The average age of Monterey County visitors surveyed is 45.8 years. Approximately one-third of respondents are over the age of 55 (30.9%).

A similar proportion are Millennials (28.9%).

Chart 24: Age



Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
65 or older	17.8%	6.6%	8.9%
55 to 64	20.5%	14.8%	12.5%
45 to 54	19.5%	13.1%	18.5%
35 to 44	13.0%	24.6%	19.4%
25 to 34	18.9%	21.3%	25.4%
Under 25	5.2%	14.8%	8.5%
I prefer not to answer	5.2%	4.9%	6.9%
<b>Mean</b>	<b>47.7</b>	<b>40.6</b>	<b>42.2</b>
<b>Base</b>	<b>737</b>	<b>61</b>	<b>248</b>

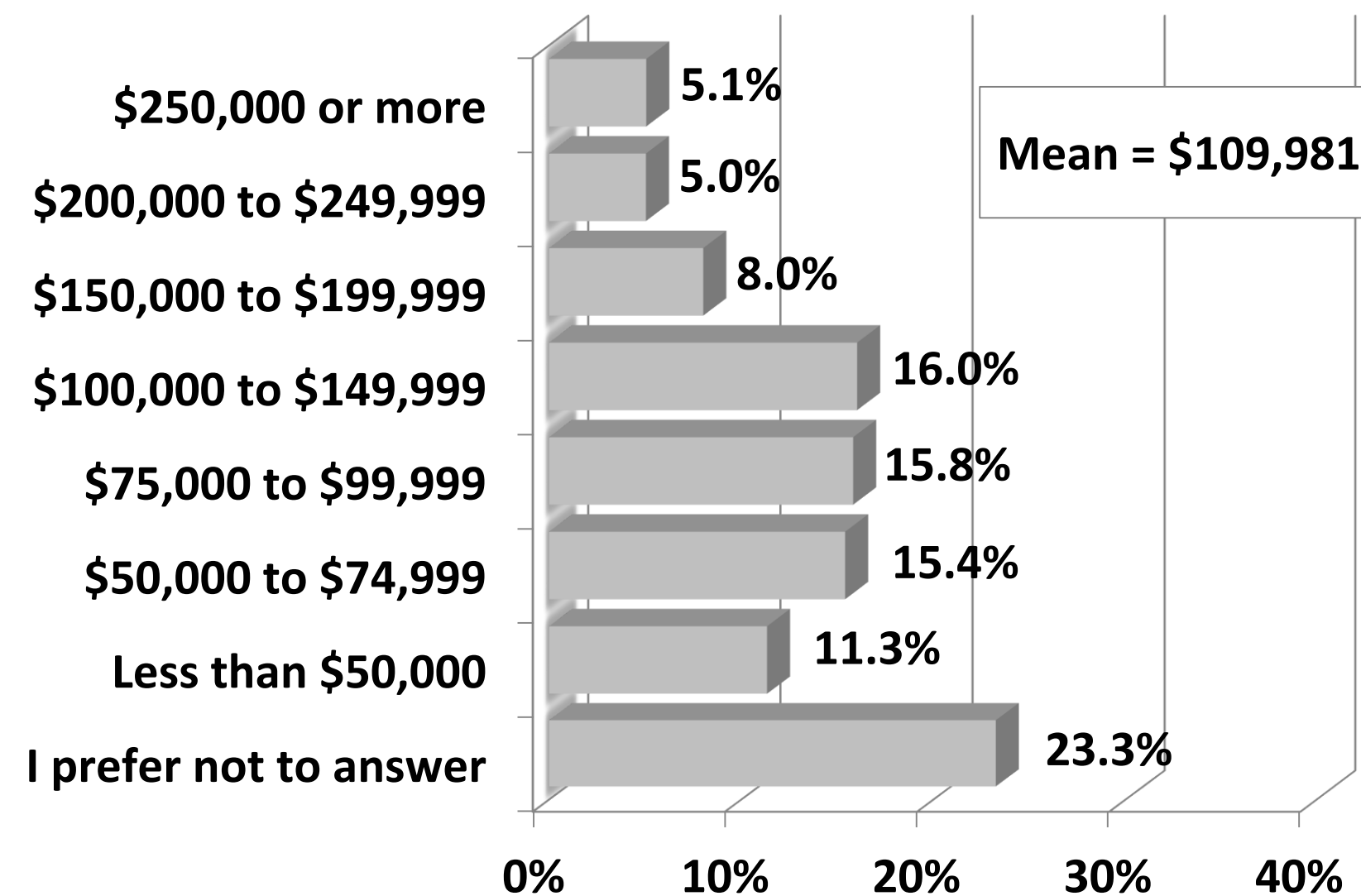
Question: What is your age? (Select one)

Base: All respondents. 1164 completed surveys.

# Annual Household Income

**Monterey County’s visitors are an affluent group.** 34.2 percent have an annual household income of \$100,000 or more, with the average annual household income across all visitors at \$109,981. Lodging guests have the highest average household income (\$117,992) compared to other visitor types.

**Chart 25: Annual Household Income**



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

**Detail by Type of Visitor**

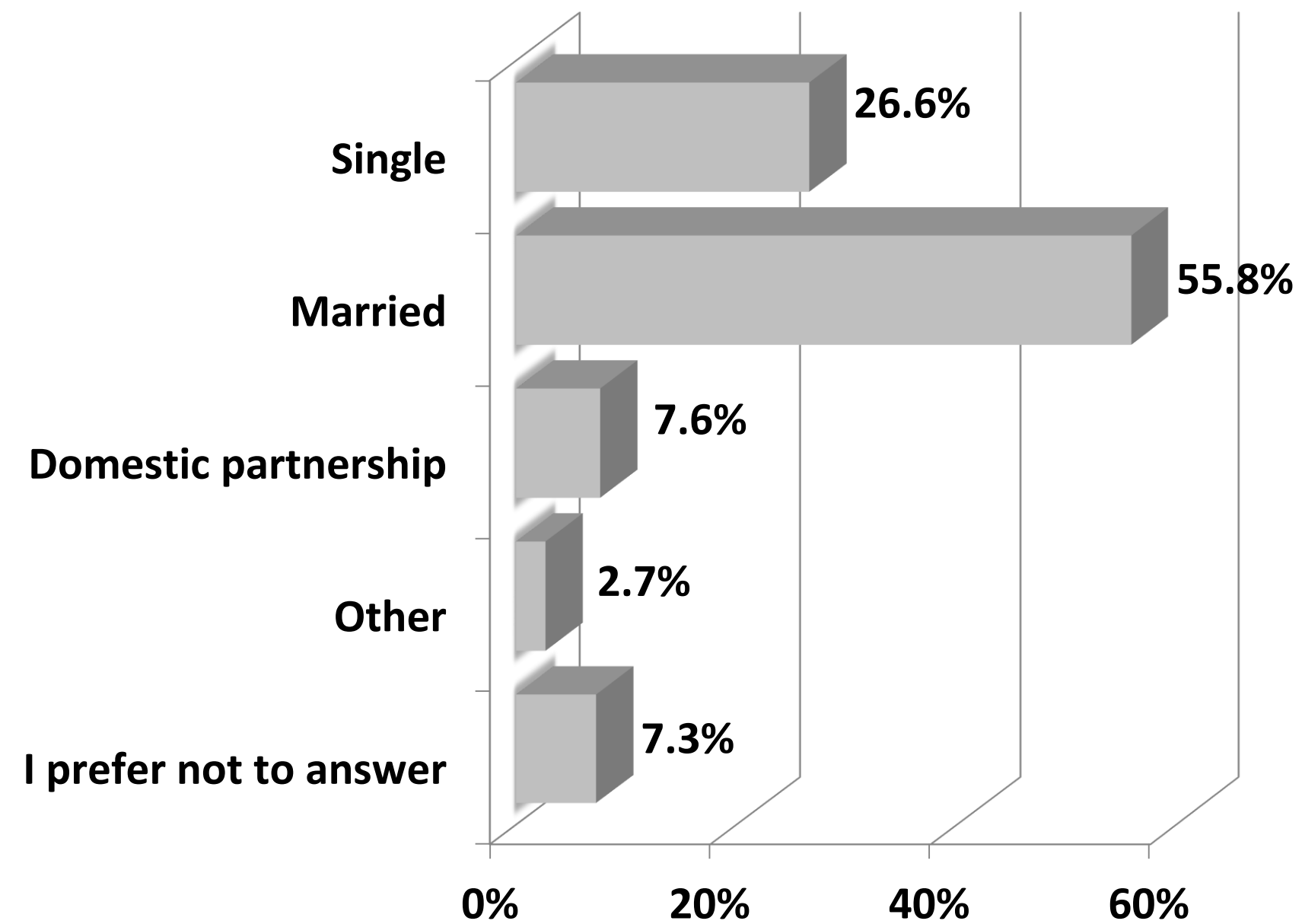
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
\$250,000 or more	6.2%	1.6%	4.5%
\$200,000 to \$249,999	4.8%	6.6%	4.0%
\$150,000 to \$199,999	9.7%	8.2%	5.3%
\$100,000 to \$149,999	18.5%	14.8%	12.1%
\$75,000 to \$99,999	16.7%	11.5%	13.4%
\$50,000 to \$74,999	14.7%	19.7%	17.0%
Less than \$50,000	7.4%	23.0%	13.8%
I prefer not to answer	21.9%	14.8%	30.0%
<b>Mean</b>	<b>\$117,992</b>	<b>\$93,509</b>	<b>\$100,505</b>
<b>Base</b>	<b>729</b>	<b>61</b>	<b>247</b>

Base: All respondents. 1153 completed surveys.

# Marital Status

Two-thirds of visitors surveyed are married (55.8%) or partnered (7.6%), while one-in-four are single (26.6%).

Chart 26: Marital Status



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

Detail by Type of Visitor

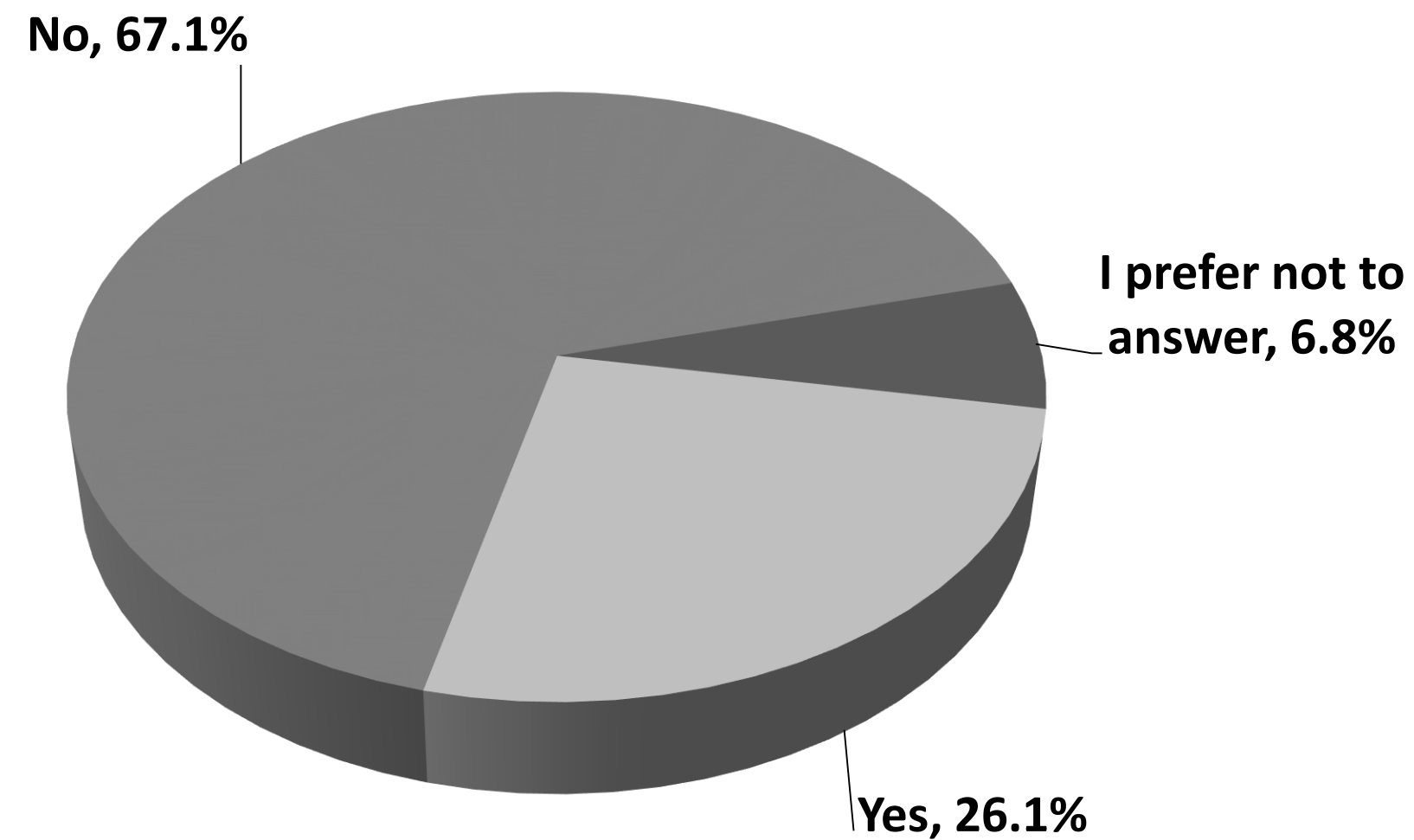
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Single	22.6%	35.5%	29.6%
Married	60.8%	43.5%	52.2%
Domestic partnership	7.2%	9.7%	7.3%
Other	2.0%	4.8%	2.4%
I prefer not to answer	7.2%	6.5%	8.5%
<b>Base</b>	<b>733</b>	<b>62</b>	<b>247</b>

Base: All respondents. 1161 completed surveys.

# Children in Household

Over one-quarter of visitors surveyed have children under the age of 18 in their household (26.1%).

Chart 27: Children in Household



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

Detail by Type of Visitor

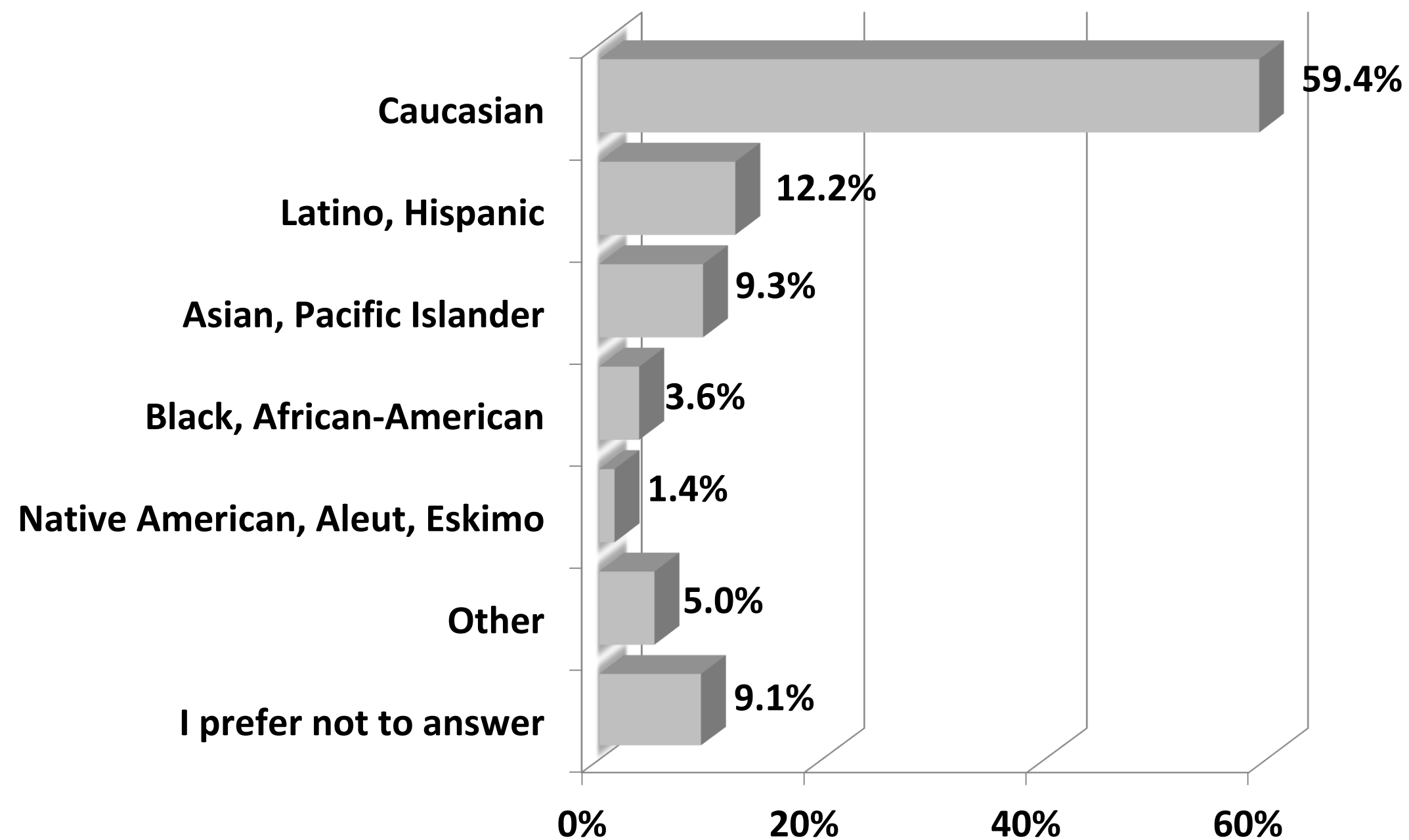
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Yes	21.9%	29.0%	32.1%
No	71.4%	67.7%	58.5%
I prefer not to answer	6.7%	3.2%	9.3%
<b>Base</b>	<b>732</b>	<b>62</b>	<b>246</b>

Base: All respondents. 1159 completed surveys.

# Ethnicity

Monterey County visitors surveyed are ethnically diverse—with 40.6 percent who identify as a non-Caucasian ethnicity. One-in-ten are Latino-Hispanic (12.2%) while 9.3 percent identify as Asian-Pacific Islander and 3.6 percent of visitors surveyed are Black-African-American.

Chart 28: Ethnicity



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

Detail by Type of Visitor

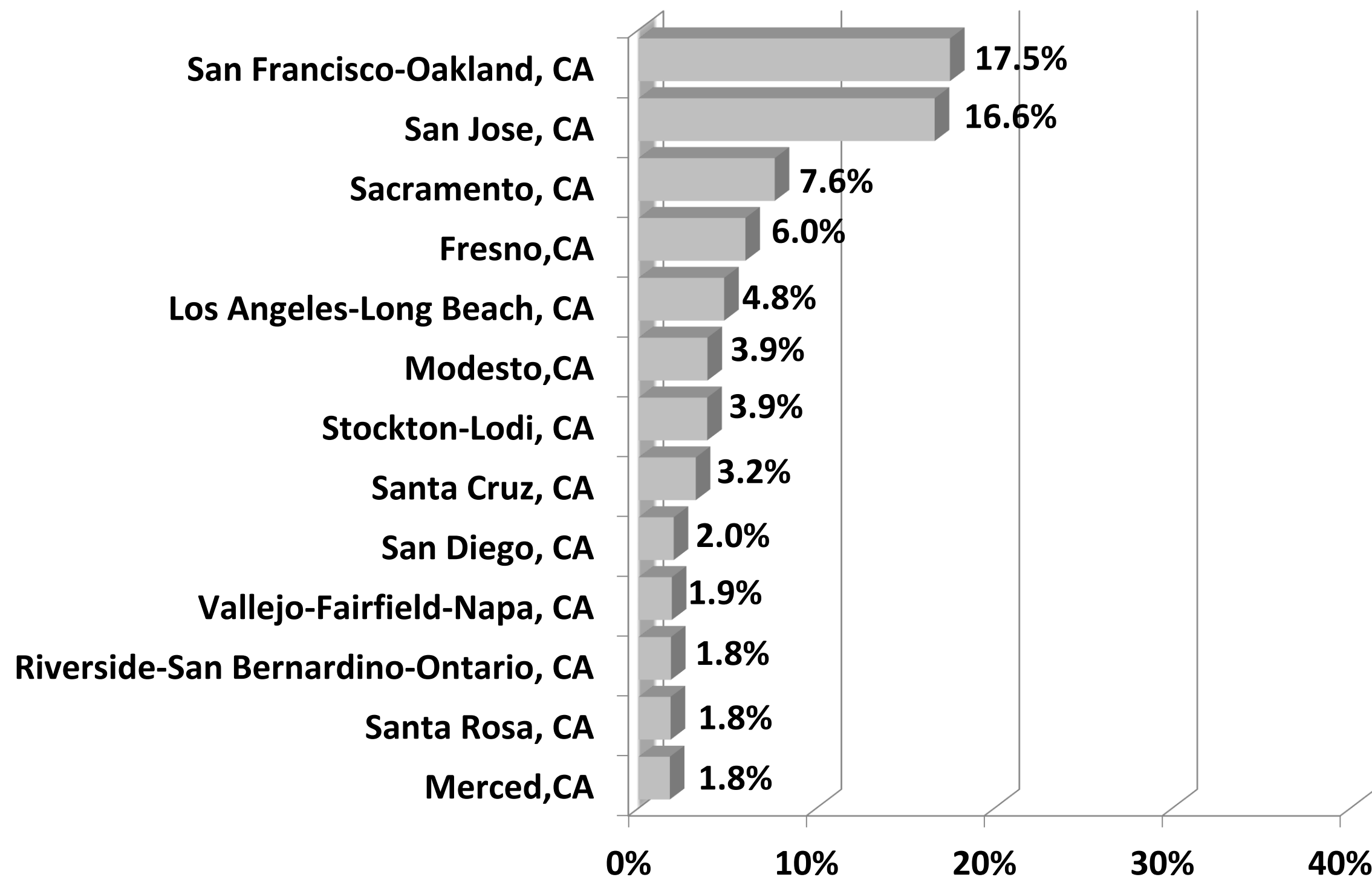
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Caucasian	66.2%	55.7%	47.0%
Latino, Hispanic	8.0%	14.8%	20.2%
Asian, Pacific Islander	9.4%	8.2%	11.3%
Black, African-American	2.6%	3.3%	4.5%
Native American, Aleut, Eskimo	0.4%	3.3%	2.0%
Other	5.2%	4.9%	4.9%
I prefer not to answer	8.3%	9.8%	10.1%
<b>Base</b>	<b>737</b>	<b>61</b>	<b>247</b>

Base: All respondents. 1162 completed surveys.

# Point of Origin: MSAs

The County's top domestic feeder market is the San Francisco-Oakland, CA MSA (17.5%), followed by the San Jose, CA MSA which contributed 16.6 percent of the County's domestic visitors surveyed.

Chart 29: Point of Origin—Top MSAs (% of domestic visitors)



Question: What is your zip/postal code?

Detail by Type of Visitor

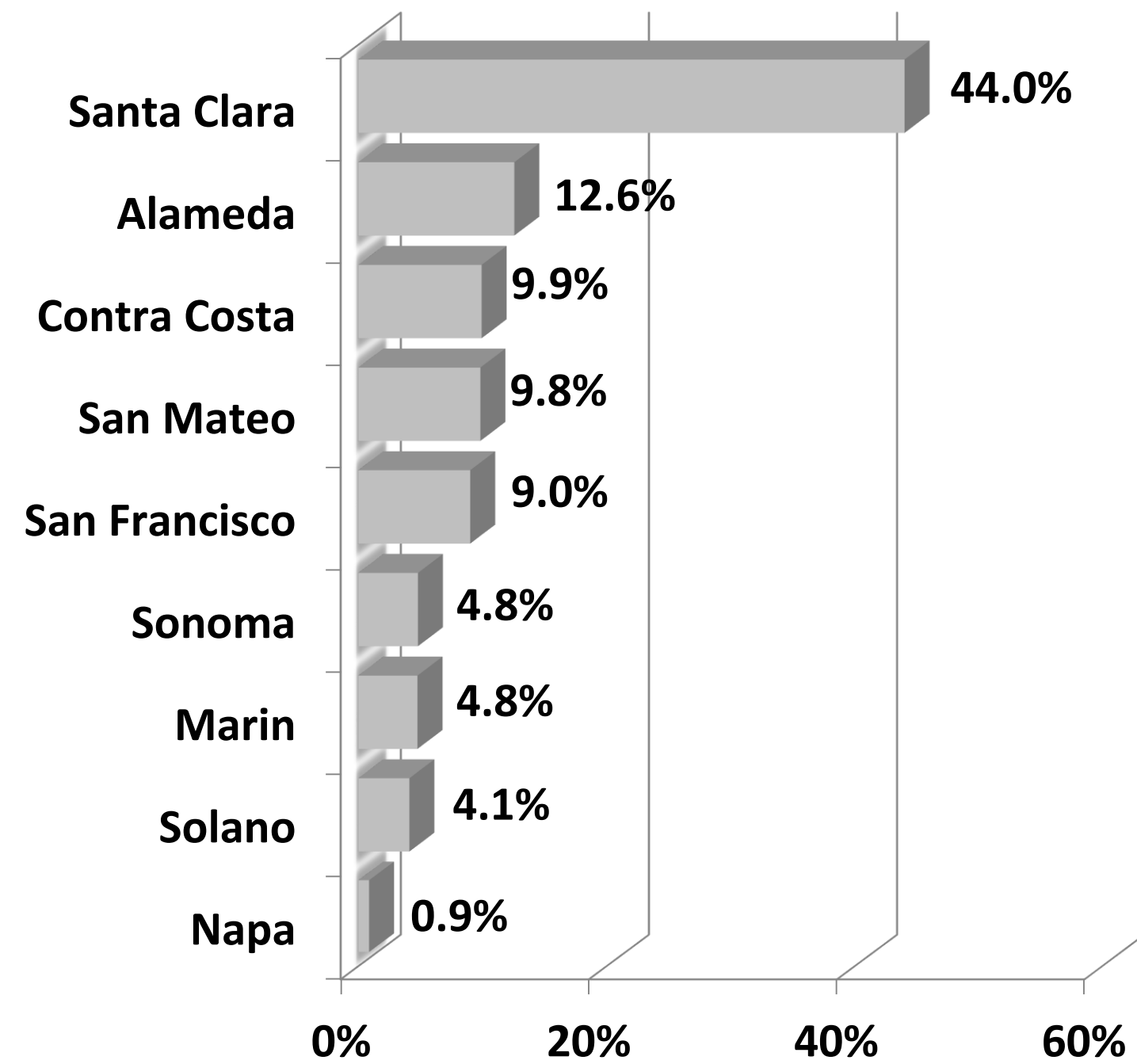
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
San Francisco-Oakland, CA	19.4%	9.6%	17.3%
San Jose, CA	9.8%	11.5%	28.5%
Sacramento, CA	8.9%	13.5%	3.7%
Fresno, CA	5.2%	5.8%	8.4%
Los Angeles-Long Beach, CA	5.7%	3.8%	3.7%
Modesto, CA	3.8%	1.9%	5.6%
Stockton-Lodi, CA	4.8%	3.8%	3.7%
Santa Cruz, CA	1.5%	0.0%	7.5%
San Diego, CA	2.5%	3.8%	1.4%
Vallejo-Fairfield-Napa, CA	2.2%	0.0%	2.3%
Riverside-San Bernardino-Ontario, CA	2.9%	1.9%	0.0%
Santa Rosa, CA	2.0%	3.8%	0.5%
Merced, CA	0.6%	0.0%	3.7%
<b>Base</b>	<b>651</b>	<b>52</b>	<b>214</b>

Base: Domestic respondents. 1006 completed surveys.

# Point of Origin: Counties (Bay Area Residents)

The largest proportion of visitors from the San Francisco Bay Area reside in the nearby county of Santa Clara (44.0%). Residents of Alameda County account for 12.6 percent of this regional traffic.

Chart 30: Point of Origin—Top Counties (% of Bay Area visitors)



Question: What is your zip/postal code?

Detail by Type of Visitor

	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
Santa Clara	30.6%	46.2%	57.8%
Alameda	15.7%	0.0%	10.8%
Contra Costa	14.8%	0.0%	8.8%
San Mateo	10.6%	15.4%	7.8%
San Francisco	9.7%	15.4%	6.9%
Sonoma	6.0%	15.4%	1.0%
Marin	6.0%	7.7%	2.0%
Solano	5.6%	0.0%	3.9%
Napa	0.9%	0.0%	1.0%
<b>Base</b>	<b>216</b>	<b>13</b>	<b>102</b>

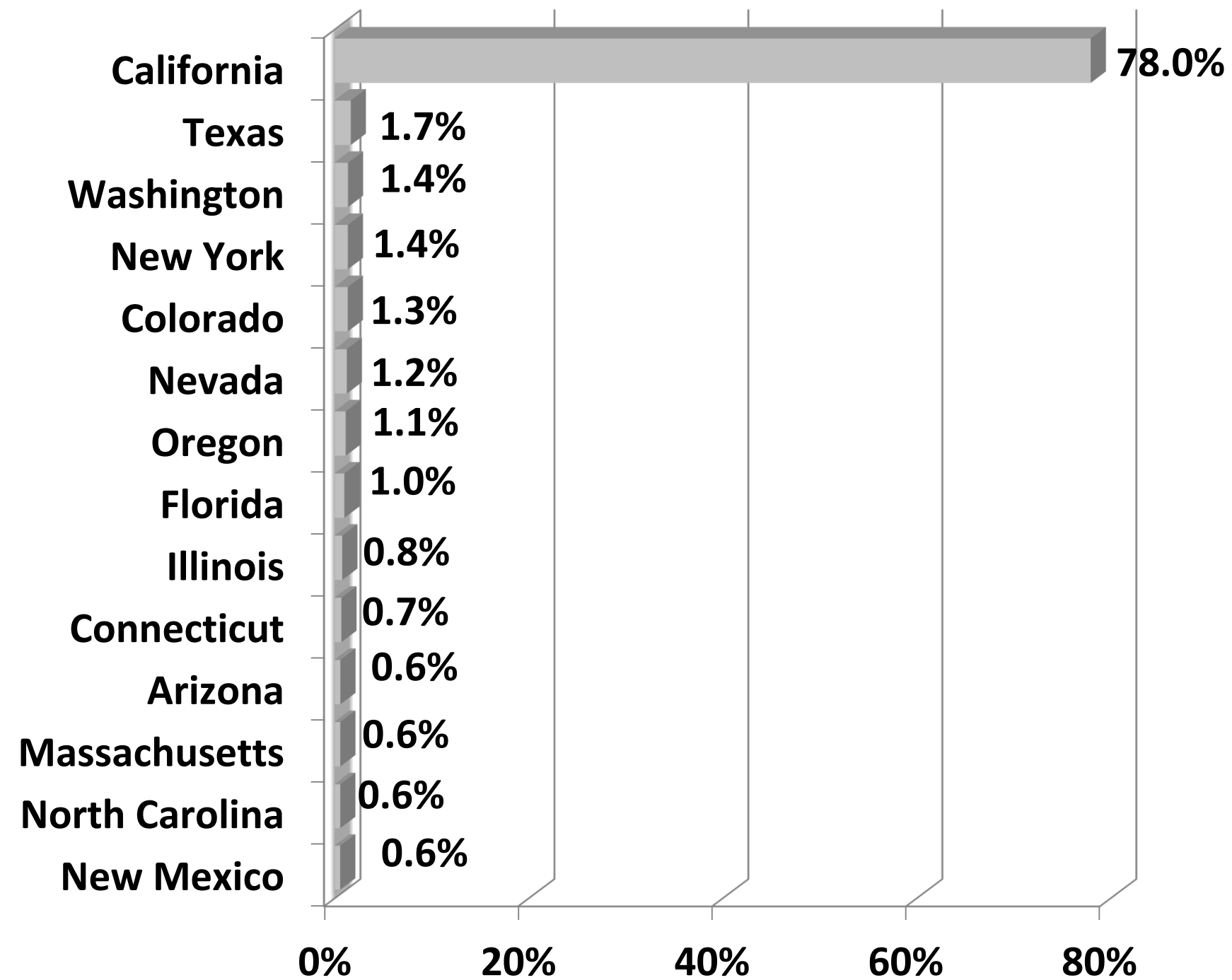
Base: Bay Area respondents. 376 completed surveys.



# Point of Origin: States

Nearly 80 percent of domestic visitors surveyed reside within the state of California (78.0%). Second-tier feeder markets include Texas (1.7%), Washington (1.4%), New York (1.4%) and Colorado (1.3%).

Chart 31: Point of Origin—Top States



Question: What is your zip/postal code?

Detail by Type of Visitor

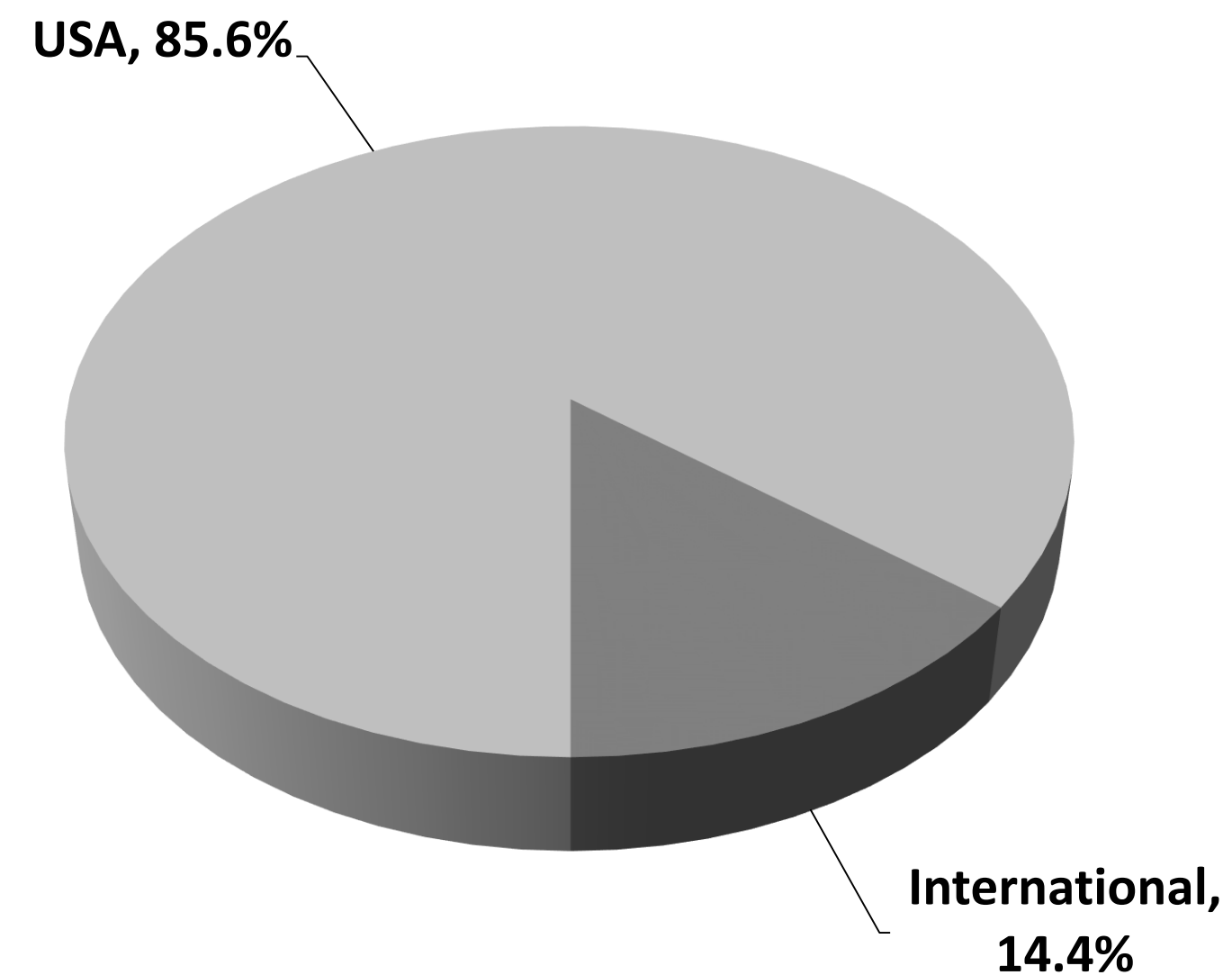
	Lodging Guests	Visiting Friends & Relatives	Day-Trippers
California	77.4%	64.4%	86.8%
Texas	1.2%	3.4%	1.3%
Washington	1.6%	1.7%	0.0%
New York	1.3%	1.7%	0.9%
Colorado	0.7%	3.4%	1.3%
Nevada	1.9%	3.4%	0.0%
Oregon	1.2%	1.7%	0.4%
Florida	1.2%	0.0%	0.4%
Illinois	1.0%	0.0%	0.4%
Connecticut	0.3%	0.0%	1.3%
Arizona	1.2%	0.0%	0.0%
Massachusetts	0.9%	0.0%	0.4%
North Carolina	0.3%	0.0%	0.9%
New Mexico	0.3%	1.7%	0.4%
<b>Base</b>	<b>689</b>	<b>59</b>	<b>234</b>

Base: Domestic respondents. 1090 completed surveys.

# Point of Origin: Countries

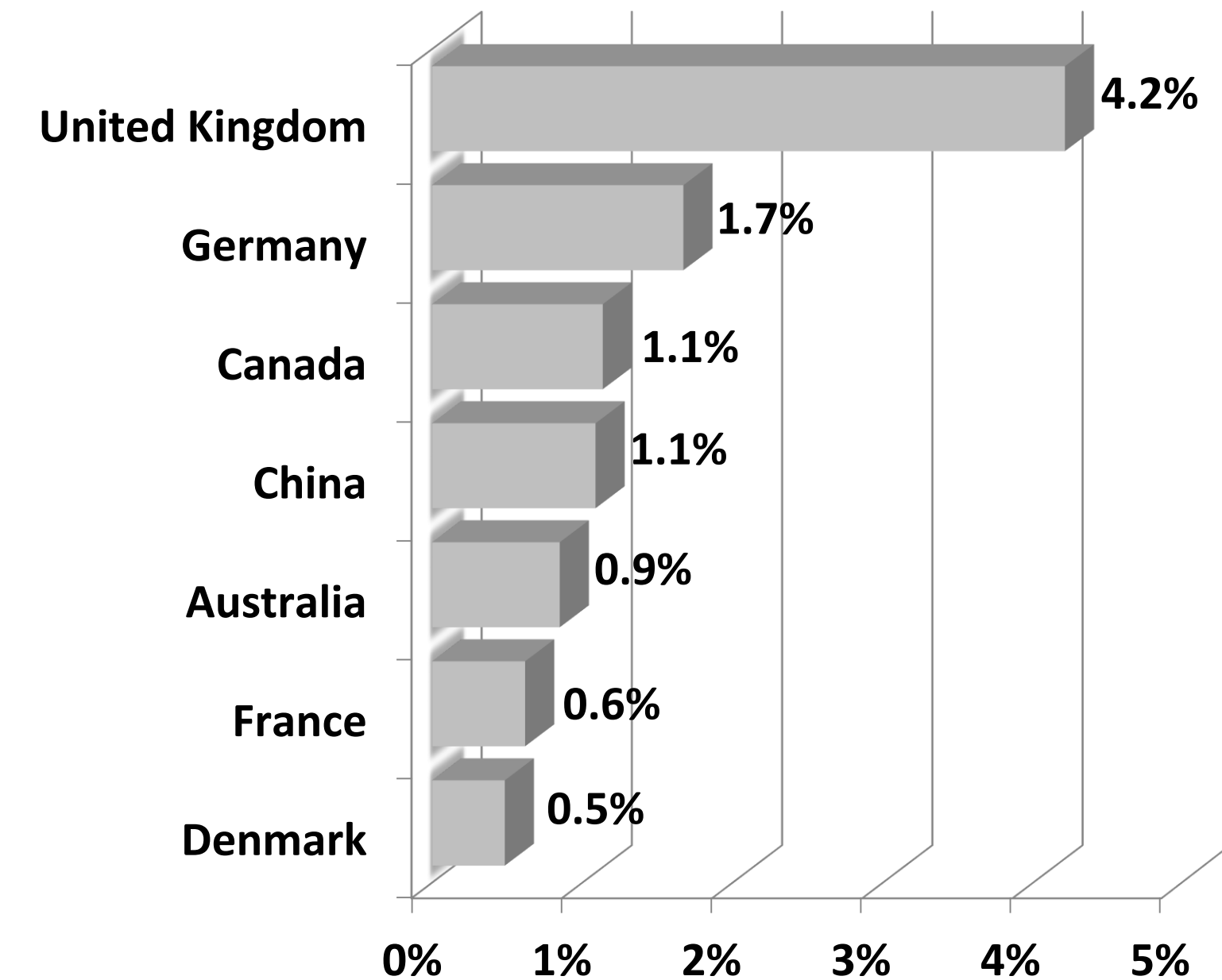
**International residents account for 13.4 percent of visitors surveyed.** Residents of the United Kingdom represent the largest percentage of the international travelers to Monterey County (3.8%), followed by Germany (1.7%) and Canada (1.1%). Please note that the survey was only available in English.

**Chart 32: Point of Origin—Domestic vs. International**



Question: What is your zip/postal code?

**Chart 33: Point of Origin—Top Countries (International Visitors)**



Base: All respondents. 1135 completed surveys.

# APPENDIX I

## ORIGIN MARKET SIDE BY SIDE COMPARISON

# Origin Market Side by Side Comparison

The table at right compares key trip details 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 (Outside California). Visitors from more distant markets (Southern California, Outside California) are more likely to stay in hotels and spend more nights in market (at least 2.8 on average). An overnight visitor from out-of-state represents the highest economic impact to the County, spending \$418.86 per day for 4.9 days on average.

Detail by Origin Market		Total Answering	Bay Area	Central Valley	Southern California	Outside California
<b>Reason for visiting</b>						
	<b>Total Leisure</b>	90.4%	92.6%	93.5%	85.6%	89.9%
	<b>Vacation</b>	39.1%	31.0%	26.0%	31.7%	55.9%
	<b>Weekend getaway</b>	33.6%	46.4%	52.8%	29.5%	14.5%
<b>Place of Stay</b>						
	<b>Hotel, motel, inn or hostel in Monterey</b>	66.6%	60.7%	66.7%	77.7%	68.9%
	<b>Private home rental</b>	3.8%	3.6%	0.4%	4.3%	5.4%
	<b>Private residence in Monterey</b>	5.2%	3.3%	5.7%	6.5%	6.3%
	<b>Other</b>	2.7%	1.5%	3.5%	1.4%	3.0%
	<b>Day Trip</b>	17.5%	27.7%	19.7%	6.5%	10.7%
<b>Trip Length</b>						
	<b>Days</b>	3.4	2.4	2.3	3.4	4.9
	<b>Nights</b>	2.6	1.5	1.5	2.8	4.1
	<b>Nights – Overnight Visitors Only</b>	3.0	2.0	1.9	3.0	4.4
<b>Spending Per Day</b>						
	<b>Hotel/motel/inn</b>	\$157.58	\$145.00	\$129.36	\$217.93	\$171.41
	<b>Restaurants</b>	\$114.65	\$110.85	\$113.66	\$128.78	\$118.85
	<b>Retail purchases</b>	\$59.72	\$55.47	\$63.00	\$61.93	\$58.61
	<b>Entertainment &amp; sightseeing</b>	\$33.48	\$30.19	\$30.39	\$38.01	\$37.03
	<b>Car rental fees</b>	\$13.93	\$0.78	\$2.07	\$14.48	\$32.97
	<b>Gas, parking and local transportation</b>	\$24.21	\$14.89	\$40.77	\$30.01	\$22.92
	<b>Other</b>	\$59.55	\$52.98	\$49.57	\$97.44	\$61.47
	<b>Total</b>	<b>\$379.36</b>	<b>\$342.30</b>	<b>\$338.49</b>	<b>\$461.13</b>	<b>\$418.86</b>
	<b>Total – Overnight Visitors Only</b>	<b>\$531.23</b>	<b>\$505.99</b>	<b>\$490.43</b>	<b>\$627.27</b>	<b>\$555.06</b>

# APPENDIX II

## VISITOR DEMOGRAPHICS BY QUARTER

# Visitor Demographics by Quarter

## Gender

	Total	Q1	Q2	Q3	Q4
Female	53.6%	53.8%	59.4%	52.7%	45.5%
Male	42.0%	44.3%	38.9%	38.5%	49.2%
I prefer not to answer	4.4%	1.9%	1.7%	8.8%	5.3%
<b>Base</b>	<b>1138</b>	<b>316</b>	<b>303</b>	<b>330</b>	<b>189</b>

## Age

	Total	Q1	Q2	Q3	Q4
65 or older	14.9%	12.3%	15.7%	16.8%	14.9%
55 to 64	18.4%	18.2%	20.0%	17.1%	18.1%
45 to 54	18.7%	21.1%	19.3%	16.8%	17.0%
35 to 44	15.4%	17.0%	15.4%	13.5%	16.0%
25 to 34	21.0%	23.0%	20.7%	18.0%	23.4%
Under 25	6.4%	5.7%	6.9%	6.0%	7.4%
I prefer not to answer	5.2%	2.8%	2.0%	11.7%	3.2%
<b>Mean</b>	<b>45.9</b>	<b>45.2</b>	<b>46.2</b>	<b>46.8</b>	<b>45.1</b>
<b>Base</b>	<b>1144</b>	<b>318</b>	<b>305</b>	<b>333</b>	<b>188</b>

## Income

	Total	Q1	Q2	Q3	Q4
\$250,000 or more	5.4%	5.4%	6.6%	4.6%	4.8%
\$200,000 to \$249,999	5.0%	5.8%	4.9%	4.0%	5.9%
\$150,000 to \$199,999	8.7%	7.0%	10.8%	5.8%	12.9%
\$100,000 to \$149,999	16.7%	18.2%	18.4%	11.0%	21.5%
\$75,000 to \$99,999	16.0%	19.5%	15.7%	13.4%	15.1%
\$50,000 to \$74,999	15.4%	16.3%	17.0%	13.7%	14.0%
Less than \$50,000	10.0%	10.9%	9.2%	10.1%	9.7%
I prefer not to answer	22.9%	16.9%	17.4%	37.5%	16.1%
<b>Mean</b>	<b>\$112,700</b>	<b>\$110,192</b>	<b>\$116,269</b>	<b>\$107,256</b>	<b>\$118,269</b>
<b>Base</b>	<b>1132</b>	<b>313</b>	<b>305</b>	<b>328</b>	<b>186</b>

# Visitor Demographics by Quarter

## Marital Status

	Total	Q1	Q2	Q3	Q4
Single	25.2%	25.6%	25.7%	23.0%	27.4%
Married	57.6%	60.4%	59.5%	53.9%	56.3%
Domestic partnership	7.5%	7.3%	7.9%	6.7%	8.4%
Other	2.5%	2.5%	2.0%	2.4%	3.2%
I prefer not to answer	7.3%	4.1%	4.9%	13.9%	4.7%
<b>Base</b>	<b>1140</b>	<b>316</b>	<b>304</b>	<b>330</b>	<b>190</b>

## Ethnicity

	Total	Q1	Q2	Q3	Q4
Caucasian	61.4%	60.7%	69.4%	57.7%	56.3%
Non-Caucasian	29.7%	33.6%	24.7%	25.7%	37.9%
I prefer not to answer	8.9%	5.7%	5.9%	16.6%	5.8%
<b>Base</b>	<b>1143</b>	<b>318</b>	<b>304</b>	<b>331</b>	<b>190</b>

## Children In Household

	Total	Q1	Q2	Q3	Q4
Yes	24.9%	30.9%	22.7%	22.7%	21.9%
No	68.3%	65.6%	72.4%	63.6%	74.3%
I prefer not to answer	6.9%	3.5%	4.9%	13.6%	3.7%
<b>Base</b>	<b>1138</b>	<b>317</b>	<b>304</b>	<b>330</b>	<b>187</b>

# APPENDIX III

## YEAR OVER YEAR COMPARISON



# Year Over Year Findings

## Primary Reason for Monterey County Trip

	2016	2015
Vacation	38.9%	41.9%
Weekend getaway	33.4%	34.8%
Visiting friends or relatives	8.3%	8.5%
Other personal reasons	6.4%	4.0%
Attend special event/exhibition/concert	4.9%	6.5%
Business	3.9%	1.2%
Convention/group meeting	3.8%	2.6%
Government/military travel	0.5%	0.5%
<b>Base</b>	<b>1294</b>	<b>833</b>

## Place of Stay

	2016	2015
Hotel, motel, inn or hostel in Monterey County	51.7%	49.1%
Private residence in Monterey County	8.2%	12.3%
Private home rental	5.5%	5.4%
Hotel, motel, inn or hostel outside of Monterey County	4.3%	3.8%
Private residence outside of Monterey County	1.8%	2.4%
Other (campground, RV park, etc.)	3.9%	2.8%
Just passing through Monterey County	12.7%	14.1%
Bay area resident on day trip	11.9%	10.1%
<b>Base</b>	<b>1031</b>	<b>837</b>

# Year Over Year Findings (continued)

## Travel Party Composition

	2016	2015
Female adults	1.5	1.4
Male adults	1.3	1.2
Female children	0.2	0.3
Male children	0.2	0.3
<b>Travel Party Mean</b>	<b>3.1</b>	<b>1.4</b>
<b>Travel Parties with Children</b>	<b>18.7%</b>	<b>22.4%</b>
<b>Base</b>	<b>1282</b>	<b>824</b>

## Days in Monterey County

	2016	2015
5 or more	11.5%	11.4%
4	10.4%	10.1%
3	22.6%	20.7%
2	21.2%	22.6%
1	34.3%	34.4%
<b>Mean</b>	<b>3.6</b>	<b>2.7</b>
<b>Base</b>	<b>1240</b>	<b>819</b>

## Nights in Monterey County

	2016	2015
5 or more	8.9%	8.9%
4	4.5%	5.0%
3	13.6%	12.6%
2	26.6%	24.6%
1	19.9%	18.2%
0	26.3%	30.7%
<b>Mean</b>	<b>2.7</b>	<b>1.9</b>
<b>Base</b>	<b>1240</b>	<b>819</b>

# Year Over Year Findings (continued)

## Past Visitation to Monterey County

	2016	2015
5 or more	47.9%	47.6%
4	4.6%	4.9%
3	6.5%	6.6%
2	8.4%	8.4%
1	9.5%	11.7%
0	23.1%	20.7%
<b>Mean</b>	<b>9.9</b>	<b>9.3</b>
<b>Base</b>	<b>1183</b>	<b>726</b>

## Method of Arrival

	2016	2015
Personal car or rental car	81.2%	77.9%
Airplane (MRV)	7.4%	6.8%
Airplane (other regional)	7.0%	10.6%
Tour bus	2.0%	2.3%
Public bus	0.8%	0.4%
Amtrak	0.6%	0.1%
Other	1.0%	1.9%
<b>Base</b>	<b>1291</b>	<b>829</b>

# Year Over Year Findings (continued)

## Modes of Transportation

	2016	2015
Personal automobile	72.9%	70.8%
Rental car	18.4%	21.6%
Tour bus	3.8%	3.1%
Uber, Lyft, etc.	2.8%	N/A
Bicycle	2.8%	2.8%
Public bus	2.2%	1.7%
Taxi	1.3%	1.3%
Motorcycle	0.1%	0.5%
<b>Base</b>	<b>1313</b>	<b>837</b>

## Activities in Monterey County

	2016	2015
Dining in restaurants	87.1%	84.8%
Shopping	62.8%	66.5%
Outdoor recreation	34.5%	31.7%
Visit friends or family	21.6%	19.2%
Whale watching	14.9%	N/A
Nightlife/bars/clubs	14.0%	7.3%
Visit wineries	10.9%	12.0%
Food/wine event	7.1%	6.7%
Spa	5.9%	6.5%
Guided tour	5.2%	4.3%
Golf	3.9%	5.8%
Sporting event	1.7%	5.7%
<b>Base</b>	<b>1313</b>	<b>837</b>

# Year Over Year Findings (continued)

## Spending Per Day, Per Travel Party

	2016	2015
Hotel/motel/inn	\$132.18	\$145.86
Restaurants	\$110.07	\$125.23
Retail purchases	\$58.58	\$75.80
Entertainment & sightseeing	\$33.77	\$35.11
Gas, parking and local transportation	\$12.75	\$14.27
Car rental fees	\$22.69	\$18.36
Other	\$62.51	\$17.77
<b>Mean Spending Per Day, Per Travel Party</b>	<b>\$432.54</b>	<b>\$432.39</b>
<b>Base</b>	<b>1252</b>	<b>792</b>

## Spending Per Day, Per Person

	2016	2015
Hotel/motel/inn	\$48.09	\$47.91
Restaurants	\$40.05	\$41.13
Retail purchases	\$21.31	\$24.90
Entertainment & sightseeing	\$12.29	\$11.53
Car rental fees	\$4.64	\$4.69
Gas, parking and local transportation	\$8.25	\$6.03
Other	\$22.74	\$5.84
<b>Mean Spending Per Day, Per Person</b>	<b>\$157.37</b>	<b>\$142.02</b>
<b>Mean Travelers Covered by Spending</b>	<b>2.8</b>	<b>3.0</b>
<b>Base</b>	<b>1252</b>	<b>792</b>

# Year Over Year Findings (continued)

## Important Factors to Destination Decision

	2016	2015
Scenic beauty	66.4%	60.2%
Overall ambiance and atmosphere	47.0%	36.6%
Weather	44.4%	35.7%
Restaurants, cuisine, food culture	37.2%	36.8%
Area attractions	31.3%	30.0%
Outdoor recreational opportunities	25.9%	17.0%
Friends or family in the area	18.1%	17.7%
Shopping opportunities	13.3%	12.4%
Special event(s) and/or festival(s)	10.8%	11.7%
Good hotel rate	8.1%	6.5%
Monterey County's historical attributes	8.0%	5.7%
Wine	7.5%	9.9%
Monterey County is family-friendly	7.2%	5.3%
Lifelong desire to visit	4.7%	5.1%
Golf	3.3%	4.1%
Good deal on airfare	2.1%	0.8%
<b>Base</b>	<b>1313</b>	<b>837</b>

## Attractions Visited

	2016	2015
Cannery Row	61.4%	52.2%
Old Fisherman's Wharf	60.4%	54.2%
Monterey Bay Aquarium	40.7%	40.0%
State park or beach	33.4%	38.4%
17-Mile Drive	30.1%	30.8%
Point Lobos State Natural Reserve	14.6%	11.4%
Historical attractions	11.7%	7.0%
Any art museum or gallery	9.6%	9.2%
Wine tasting tours	8.0%	9.1%
Missions	7.7%	7.1%
Mazda Raceway Laguna Seca	1.5%	1.7%
Monterey Zoo	1.1%	0.7%
<b>Base</b>	<b>1313</b>	<b>837</b>

# Year Over Year Findings (continued)

## Monterey County Areas Visited

	2016	2015
Monterey	86.7%	84.1%
Pacific Grove	47.4%	45.8%
Carmel-by-the-Sea	43.8%	48.9%
Pebble Beach	20.2%	24.5%
Big Sur	19.7%	19.1%
Carmel Valley	15.9%	18.3%
Seaside	14.5%	13.1%
Moss Landing	12.9%	5.5%
Sand City	7.6%	6.3%
Marina	7.2%	6.2%
Salinas	6.5%	5.4%
Salinas Valley	2.6%	2.4%
Del Rey Oaks	2.0%	2.9%
<b>Base</b>	<b>1212</b>	<b>837</b>

# Year Over Year Findings (continued)

## Resources Used Before Arrival

	2016	2015
Online travel agencies	29.5%	24.9%
Information gathered on your mobile phone	19.5%	16.7%
Opinions of friends or relatives	14.0%	15.2%
User-generated content/Review websites	13.0%	14.1%
Free travel guide book(s)	4.7%	3.3%
Monterey County CVB's website	3.6%	6.4%
Travel agency	3.3%	2.7%
Monterey County Official Travel Guide	3.1%	3.2%
Facebook content	2.8%	1.6%
Commercial guide book(s)	2.7%	2.1%
YouTube or other online videos	2.1%	0.9%
Travel-related e-mail newsletter	2.1%	1.6%
Lifestyle or travel magazines	1.8%	2.3%
Newspaper travel section	1.3%	0.8%
Television programming	0.5%	1.1%
Twitter content	0.2%	0.6%
<b>Base</b>	<b>1313</b>	<b>836</b>

## Resources Used In-Market

	2016	2015
Information gathered on your mobile phone	25.5%	13.5%
User-generated content/Review websites	8.1%	5.0%
Opinions of friends or relatives	7.0%	5.8%
Free travel guide book(s)	6.6%	4.6%
Online travel agencies	4.5%	3.1%
Monterey County Official Travel Guide	2.5%	3.5%
Commercial guide book(s)	2.0%	1.7%
Monterey County CVB's website	2.0%	1.7%
Facebook content	1.4%	0.4%
Newspaper travel section	1.2%	0.3%
Travel agency	0.9%	0.6%
YouTube or other online videos	0.9%	0.3%
Lifestyle or travel magazines	0.8%	1.3%
Travel-related e-mail newsletter	0.4%	0.3%
Twitter content	0.4%	0.0%
Television programming	0.4%	0.9%
<b>Base</b>	<b>1313</b>	<b>836</b>



# Year Over Year Findings (continued)

## Return to Monterey County

	2016	2015
Yes	98.2%	99.2%
No	1.8%	0.8%
<b>Base</b>	<b>1150</b>	<b>796</b>

## Other Destinations Considered

	2016	2015
San Francisco	17.4%	17.6%
Napa Valley	8.9%	9.8%
Lake Tahoe	8.0%	7.1%
Santa Barbara	7.2%	5.1%
Sonoma County	4.6%	4.9%
Other	8.7%	1.8%
None	55.8%	47.8%
<b>Base</b>	<b>1189</b>	<b>282</b>

# Year Over Year Findings (continued)

## Gender

	2016	2015
Female	53.9%	50.6%
Male	41.4%	42.8%
I prefer not to answer	4.7%	6.7%
<b>Base</b>	<b>1159</b>	<b>793</b>

## Age

	2016	2015
65 or older	13.7%	12.5%
55 to 64	17.2%	19.3%
45 to 54	18.6%	16.4%
35 to 44	16.3%	16.4%
25 to 34	21.8%	16.5%
Under 25	7.1%	8.8%
I prefer not to answer	5.3%	10.1%
<b>Mean</b>	<b>45.1</b>	<b>45.5</b>
<b>Base</b>	<b>1164</b>	<b>800</b>

## Income

	2016	2015
\$250,000 or more	5.1%	7.6%
\$200,000 to \$249,999	5.0%	6.0%
\$150,000 to \$199,999	8.0%	9.5%
\$100,000 to \$149,999	16.0%	13.1%
\$75,000 to \$99,999	15.8%	13.2%
\$50,000 to \$74,999	15.4%	9.8%
Less than \$50,000	11.3%	9.2%
I prefer not to answer	23.3%	31.6%
<b>Mean</b>	<b>\$109,981</b>	<b>\$124,885</b>
<b>Base</b>	<b>1153</b>	<b>799</b>

# Year Over Year Findings (continued)

## Marital Status

	2016	2015
Single	26.6%	24.6%
Married	55.8%	60.2%
Domestic partnership	7.6%	3.7%
Other	2.7%	2.0%
I prefer not to answer	7.3%	9.5%
<b>Base</b>	<b>1161</b>	<b>802</b>

## Children in Household

	2016	2015
Yes	26.1%	29.2%
No	67.1%	61.7%
I prefer not to answer	6.8%	9.2%
<b>Base</b>	<b>1159</b>	<b>799</b>

## Ethnicity

	2016	2015
Caucasian	59.4%	61.3%
Latino, Hispanic	12.2%	10.3%
Asian, Pacific Islander	9.3%	8.5%
Black, African-American	3.6%	3.6%
Native American, Aleut, Eskimo	1.4%	0.4%
Other	5.0%	4.3%
I prefer not to answer	9.1%	11.6%
<b>Base</b>	<b>737</b>	<b>796</b>

# Year Over Year Findings (continued)

## Point of Origin- MSA (% of domestic visitors)

	2016	2015
San Francisco-Oakland, CA	17.5%	19.0%
San Jose, CA	16.6%	6.5%
Sacramento, CA	7.6%	12.3%
Fresno, CA	6.0%	7.3%
Los Angeles-Long Beach, CA	4.8%	4.7%
Modesto, CA	3.9%	3.5%
Stockton-Lodi, CA	3.9%	2.7%
Santa Cruz, CA	3.2%	3.2%
San Diego, CA	2.0%	1.9%
Vallejo-Fairfield-Napa, CA	1.9%	1.2%
Riverside-San Bernardino-Ontario, CA	1.8%	1.6%
Santa Rosa, CA	1.8%	1.6%
Merced, CA	1.8%	1.6%
<b>Base</b>	<b>1006</b>	<b>694</b>

# Year Over Year Findings (continued)

## Point of Origin- County (% of Bay Area visitors)

	2016	2015
Santa Clara	44.0%	36.1%
Alameda	12.6%	23.1%
Contra Costa	9.9%	11.4%
San Mateo	9.8%	7.4%
San Francisco	9.0%	8.3%
Sonoma	4.8%	4.8%
Marin	4.8%	5.3%
Solano	4.1%	2.6%
Napa	0.9%	1.0%
<b>Base</b>	<b>376</b>	<b>235</b>

# Year Over Year Findings (continued)

## Point of Origin- State

	2016	2015
California	78.0%	73.2%
Texas	1.7%	2.1%
Washington	1.4%	2.1%
New York	1.4%	1.1%
Colorado	1.3%	1.4%
Nevada	1.2%	1.3%
Oregon	1.1%	0.9%
Florida	1.0%	1.1%
Illinois	0.8%	1.3%
Connecticut	0.7%	0.1%
Arizona	0.6%	1.8%
Massachusetts	0.6%	0.7%
North Carolina	0.6%	1.1%
New Mexico	0.6%	0.3%
<b>Base</b>	<b>1090</b>	<b>746</b>