

MONTEREY COUNTY CVB Ad & Communications Research

FY16/17 Year-End Research

July 2017



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Grab life by the moments.



Background & Objectives

- The Monterey County Convention & Visitors Bureau (MCCVB) continued the “Grab Life by the Moments” brand and advertising effort begun in fall 2013 through the FY16/17 year. The campaign targets leisure travelers in drive and direct-flight (Regional) markets, as well as National markets. MCCVB launched new spring/summer ads in Q3-Q4.
- Of particular interest has been the CVB’s public relations campaign, which has been growing in terms of scope and investment.
- The following report presents research results in two groups, with the bulk of analysis in the Regional markets and an overview provided for National.
- Specific objectives of this research are to:
 - Review the results relative to established benchmarks;
 - Assess audience reaction to the creative elements;
 - Evaluate the impact of the advertising campaign on generating Monterey travel;
 - Review visitor/trip specifics and related marketing implications;
 - Estimate ad-influenced travel and associated travel revenue;
 - Quantify additional impact from the PR efforts; and
 - Provide conclusions and recommendations to guide MCCVB’s marketing efforts.

	Market	Completed Surveys
REGIONAL	San Francisco	255
	Sacramento	251
	Los Angeles	129
	San Diego	126
	Remaining CA	125
	Fly markets – Phoenix/Vegas	129
	Remaining National	260
	Total	1,275

Insights

FY16/17 Year-End Research

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Insights

- In its eighth consecutive season, MCCVB’s “Grab Life by the Moments” (GLBM) paid advertising campaign reached 38% of Regional households. This represents 5.4 million traveling households aware of the spring campaign, despite lower spending than prior waves of marketing.
- Among California and direct flight markets, the campaign is also associated with more than 200,000 overnight visits to Monterey County. Despite lower than normal shares of overnight visits using paid accommodations, solid trip spending and trip length generated \$237 million in economic impact attributable to the campaign. So the spring 2017 extension generated an ROI of \$95.
- National market ad spend was lower this spring, but recall trails spend by roughly half a year. So last fall’s high ad investment led to 28% awareness among this audience. As in Regional markets, the ads positively impacted perceptions of Monterey, as well as recent visitation and intent to visit. Compared to other destinations in the competitive set, the ads boost Monterey from middle or last to top tier.
- The ads continue to receive excellent ratings for portraying Monterey as a desirable destination, although ratings are lower than last spring’s creative. Last spring’s ratings were exceptionally high, and that measure was the first to include native and social influencer content alongside traditional paid media in the evaluation. So the novelty may have been a factor in those ratings.
- With respect to PR, MCCVB has been at the forefront of blending PR with traditional advertising, which has proven to be extremely prescient as the technology has developed to target consumers with messaging that is relevant to them in a timely manner and as sentiments toward traditional “news” has begun to shift. In terms of strategy, destinations must balance niche interest with broad reach, and MCCVB continues to build awareness with its two-pronged ad/PR efforts. A challenge with PR measures, however, is that PR can include recall of *any* news, whether or not it is messaging directed by the CVB. In the current measure, many travelers both regionally and nationally had heard of Monterey County via news of the closure of Highway 1 along the Big Sur Coast. However, the information did not decrease visit interest among very many travelers – fewer than 15% said it made them less interested in a Monterey County visit. And the increased awareness of the destination through this news coverage may actually have helped keep Monterey County top-of-mind.

Campaign Overview

FY16/17 Year-End Research

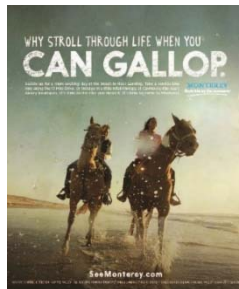
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“Grab Life By the Moments” Campaign

- 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 since 2013 when the campaign launched.
- Each seasonal campaign introduced refreshed creative, but the 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

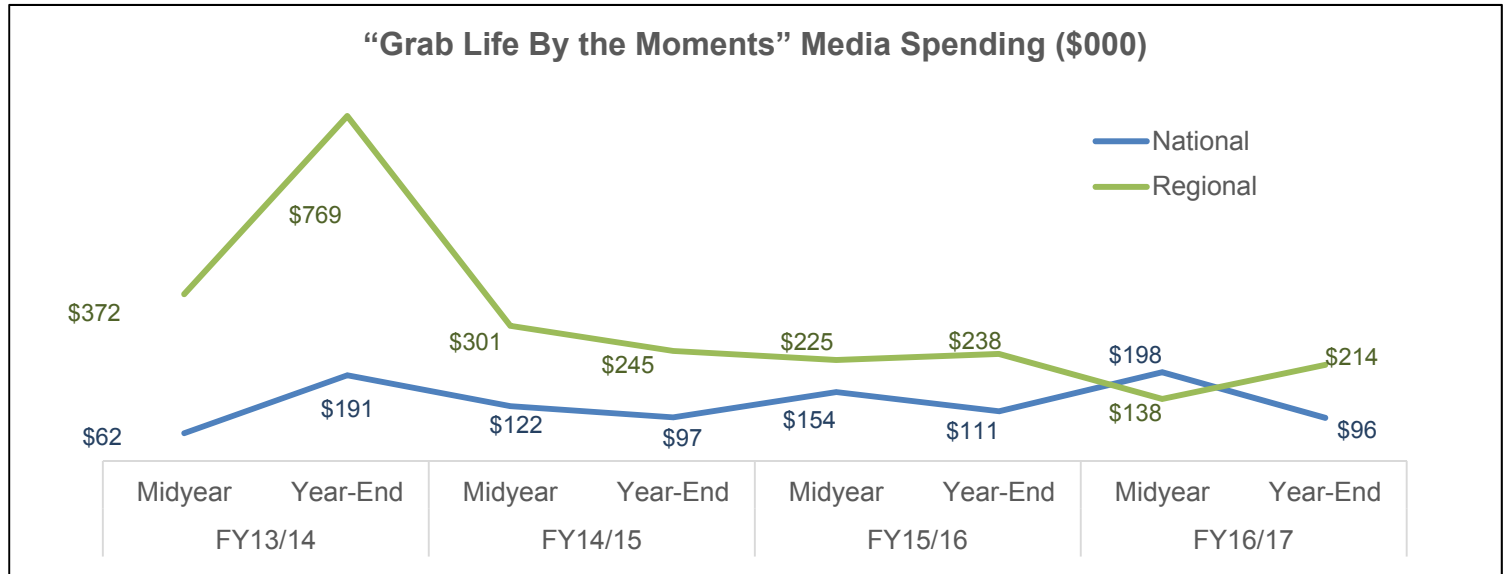


Spring 2017





Campaign Spending



- Regional spending returned to its \$200K+ level after a lower investment at midyear, which also realigned the Regional/National spending ratio.
- The strategy of spending more on National marketing in October through December may lead to more spring and summer trips, as the more distant markets need additional time to plan.

Marketing Awareness

FY16/17 Year-End Research – Regional

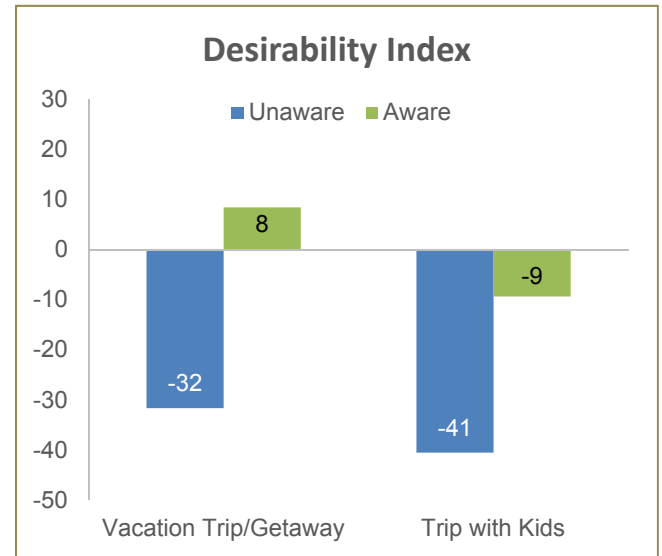
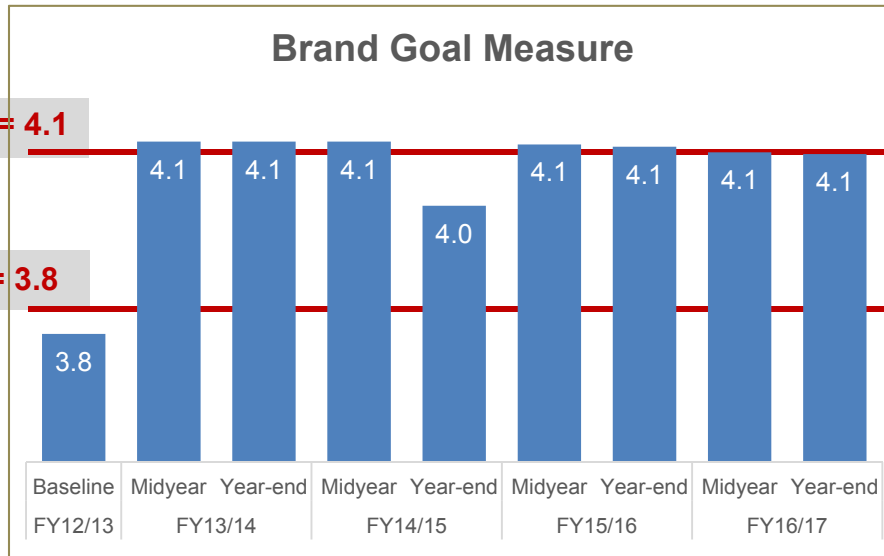
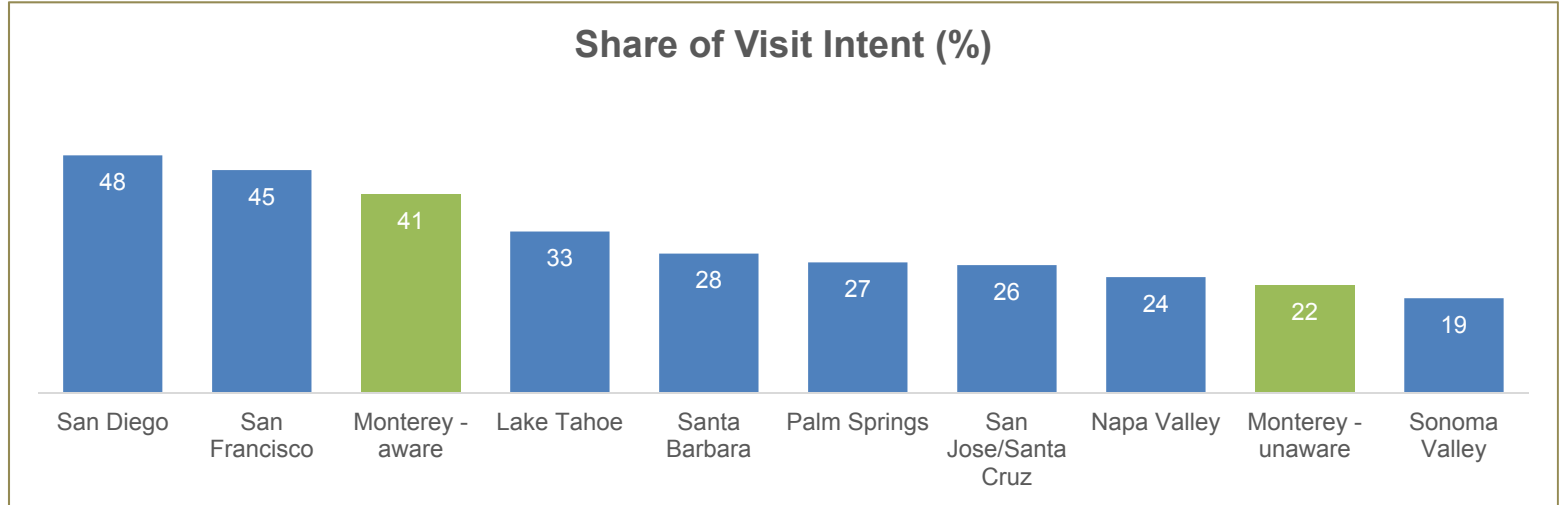
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Campaign Performance Summary

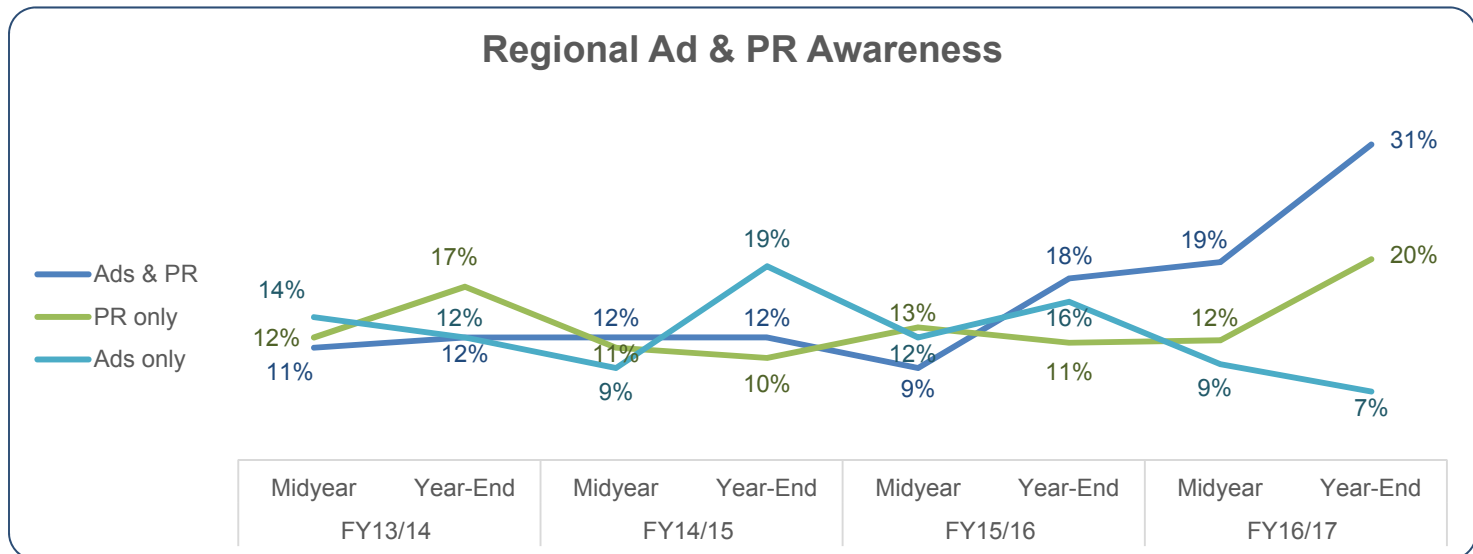


The brand goal measure is the mean Monterey rating for *amazing scenery, charming and weekend getaway destination*.



Campaign Awareness

- Recall of both ads and PR is at its highest point ever, with more than a 10-point jump from midyear. The low ad-only recall is not due to low awareness of the advertising but rather is from the high overlap, which is a desirable outcome.
- However, in the current measure a high share of PR awareness stems from news reports of the wash-out of the highway leading to Big Sur. So for the purposes of tracking MCCVB's marketing program, paid ads will be the focus of the remainder of the reporting. *This represents a difference from the Midyear report, which included analysis of awareness of paid advertising and PR.*

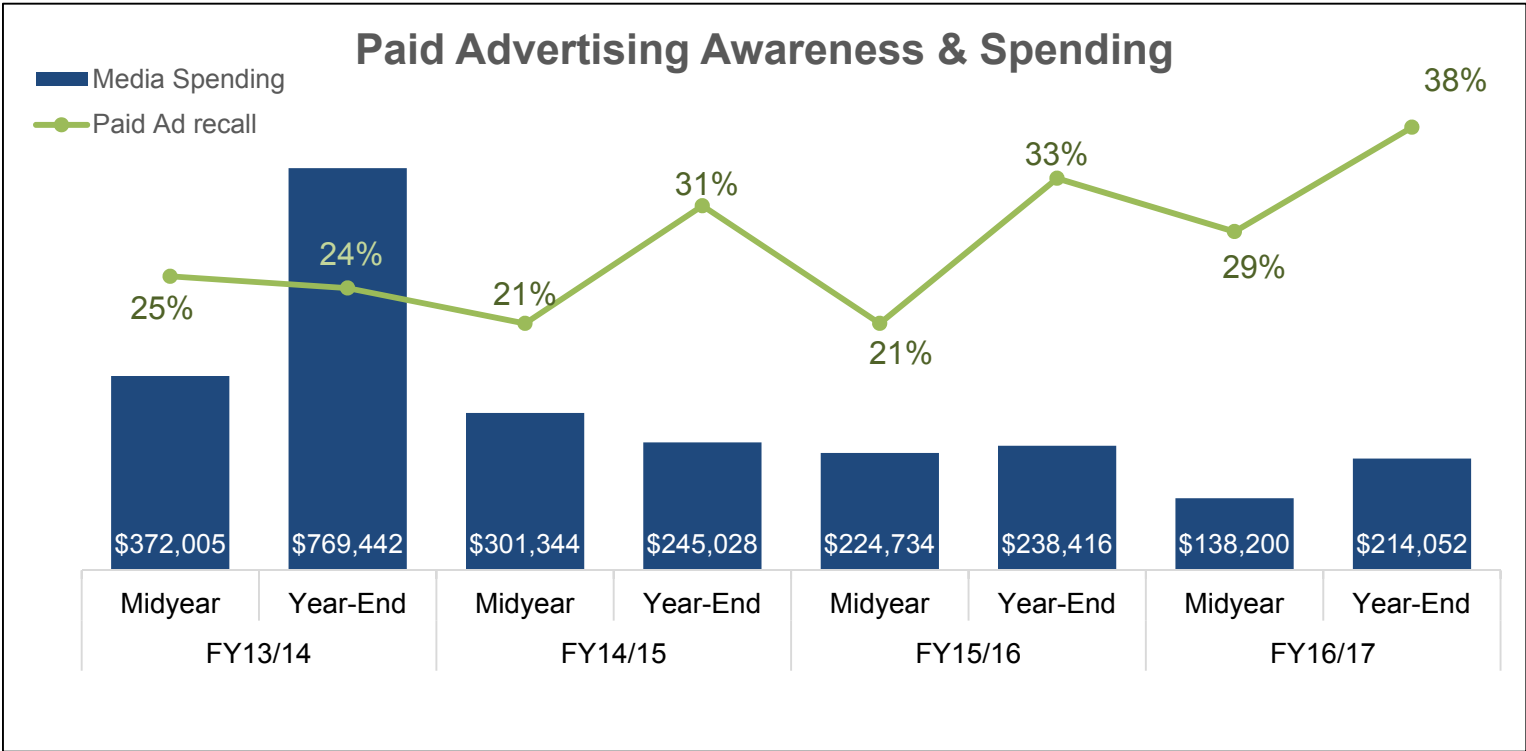


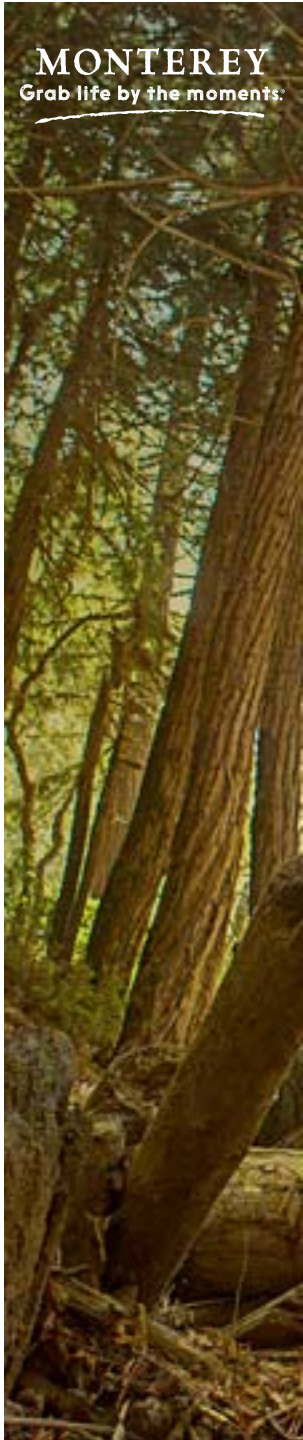
Advertising awareness is measurement of aided recall of print, email, digital banner and social media creative. PR awareness is aided recall of native ads and influencer blogs, and unaided recall of news stories, articles or feature stories about Monterey County destinations.



Campaign Awareness & Spending

- End-of-year marketing recall is typically up, and FY16/17 is no exception. This measure is taken when families are looking at summer travel options.
- Regionally, recall of the GLBM campaign continues to climb.





Cost per Aware Household

- After eight consecutive seasons, GLBM paid advertising cost just 4 cents to reach each aware household. Out of 14.4 million households in the Regional markets, 5.4 million are aware. This is well below the SMARInsights benchmark of \$0.35 that CVB spot market campaigns without TV typically pay per aware household.
- The average across the entire paid advertising campaign from fall 2013 to present is \$0.09 per aware household, which is evidence that MCCVB’s strategy is making very efficient use of its advertising investment.

	FY13/14 Midyear	FY13/14 Year-End	FY14/15 Midyear	FY14/15 Year-End	FY15/16 Midyear	FY15/16 Year-End	FY16/17 Midyear	FY16/17 Year-End
Paid Ad Awareness	25%	24%	21%	31%	21%	33%	29%	38%
Aware HH	3,457,241	3,318,951	3,020,302	4,458,542	3,033,742	4,797,014	4,145,002	5,421,539
Media Investment	\$372,005	\$769,442	\$301,344	\$245,028	\$224,734	\$238,416	\$138,200	\$214,052
Cost per Aware HH	\$0.11	\$0.23	\$0.10	\$0.05	\$0.07	\$0.05	\$0.03	\$0.04

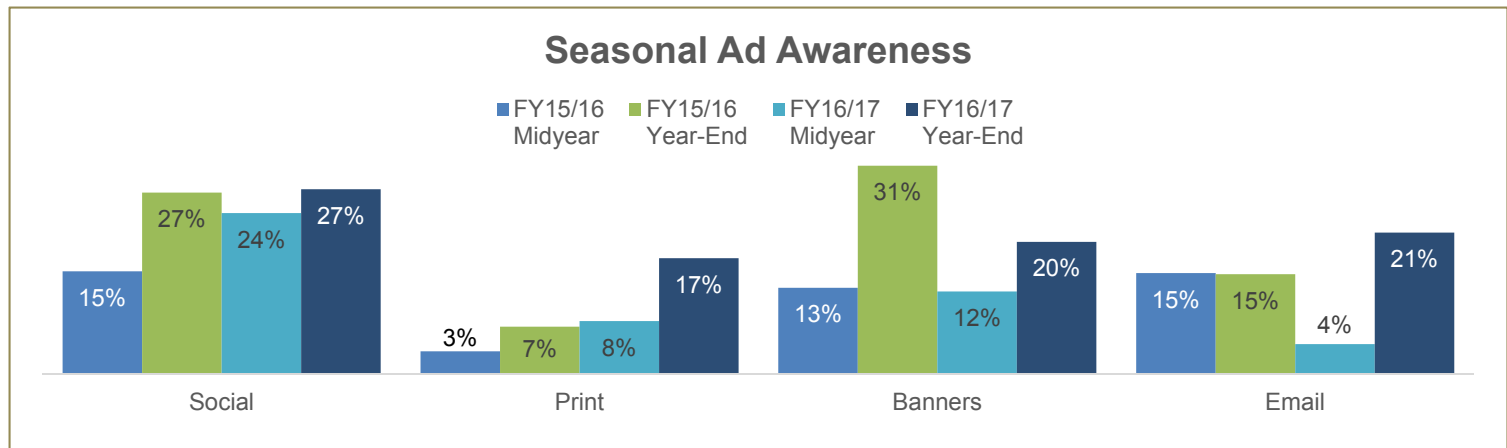
Recall figures are for paid advertising only: print, digital, social, and email executions.

Media Evaluation

FY16/17 Year-End Research – Regional



Midyear Awareness by Medium – Paid Ads

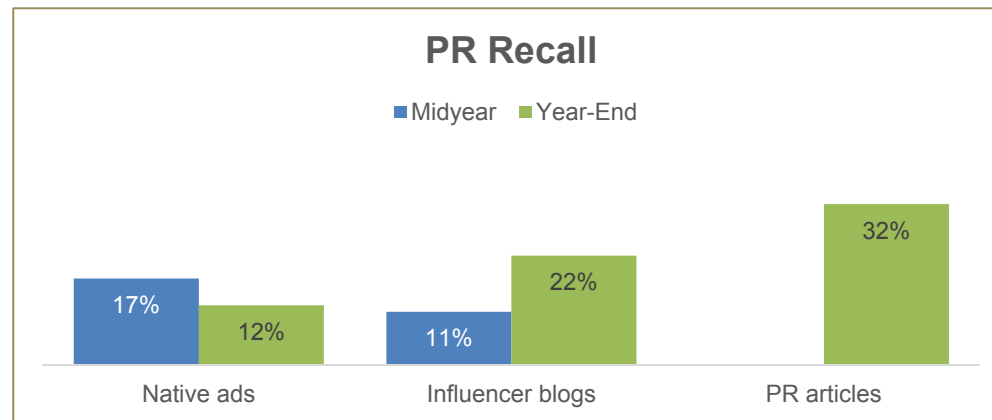


- Social content continues to lead awareness, which is one of the strengths of this medium – high reach at relatively low cost.
- Both print and email recall are at their highest points to date. Digital banners are lower than last year-end but still higher than at midyear. Images in the email blasts, digital banners, and print are the same that have been used in prior seasonal campaigns, which helps explain the high recall of these media. It must also be noted that because some of the executions are similar across media, travelers are not always able to differentiate where they saw the content.



Midyear Awareness by Medium – PR

- Only two native advertorials were measured in this research, versus eight at midyear. So the 12% recall suggests that these two items – “11 Facts About Monterey” and “Resolve to Do More (or Less)” – were well targeted and memorable.
- Social influencer blogs now reach two in 10 Regional travelers, but the news articles driven by MCCVB’s PR outreach had even higher visibility.
- Native and influencer vehicles deliver messaging that consumers experience as non-sponsored or organic. Therefore it tends to be more influential because it is not viewed as advertising; rather it is more akin to news content.
- However, news articles delivered through more traditional news outlets and vetted by recognized journalists continue to reach broader audiences and tend to carry more weight with consumers.



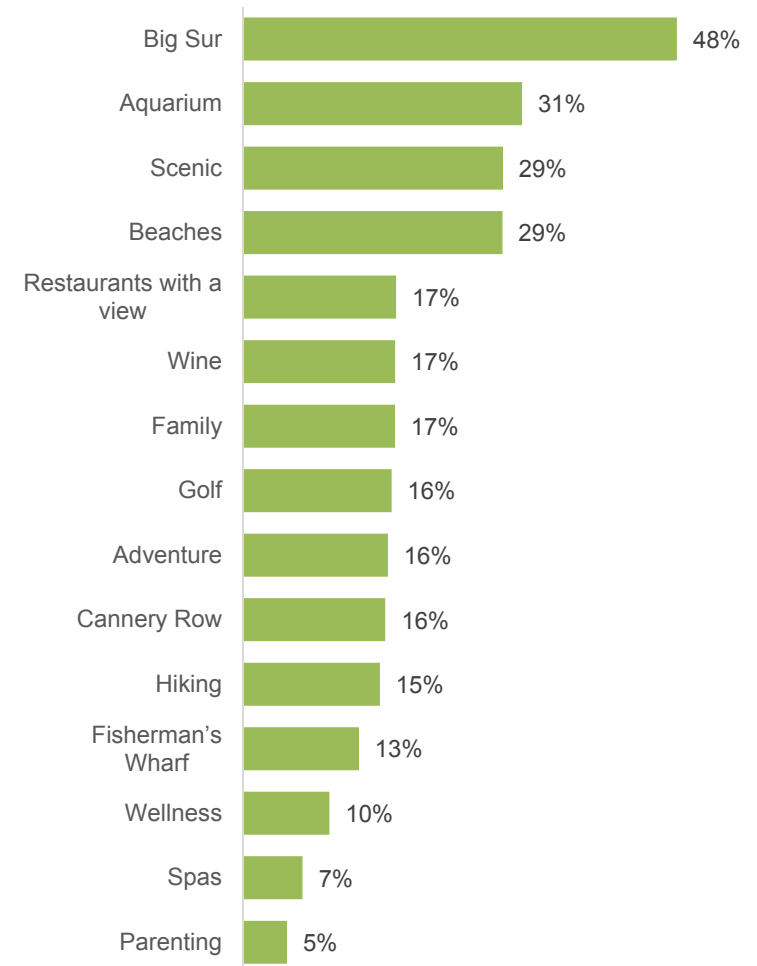


Traditional PR

- As shown in the prior slide, the inclusion of aided recall of specific articles has enabled a more complete understanding of MCCVB's PR reach.
- The topic areas shown at right illustrate that among travelers who recall *any* news about the County, Big Sur dominates. Overall, 60% of Regional travelers who recalled news about Monterey County said it was about Big Sur, Highway 1 closure, landslides, etc.
- However, the remaining topics are directionally very similar to prior measures, with beaches, the aquarium, and scenery continuing to lead.
- So in effect the Highway 1 closure broadened PR recall, which we would expect to be the case with an unusual event.

Recall of PR Topic Areas

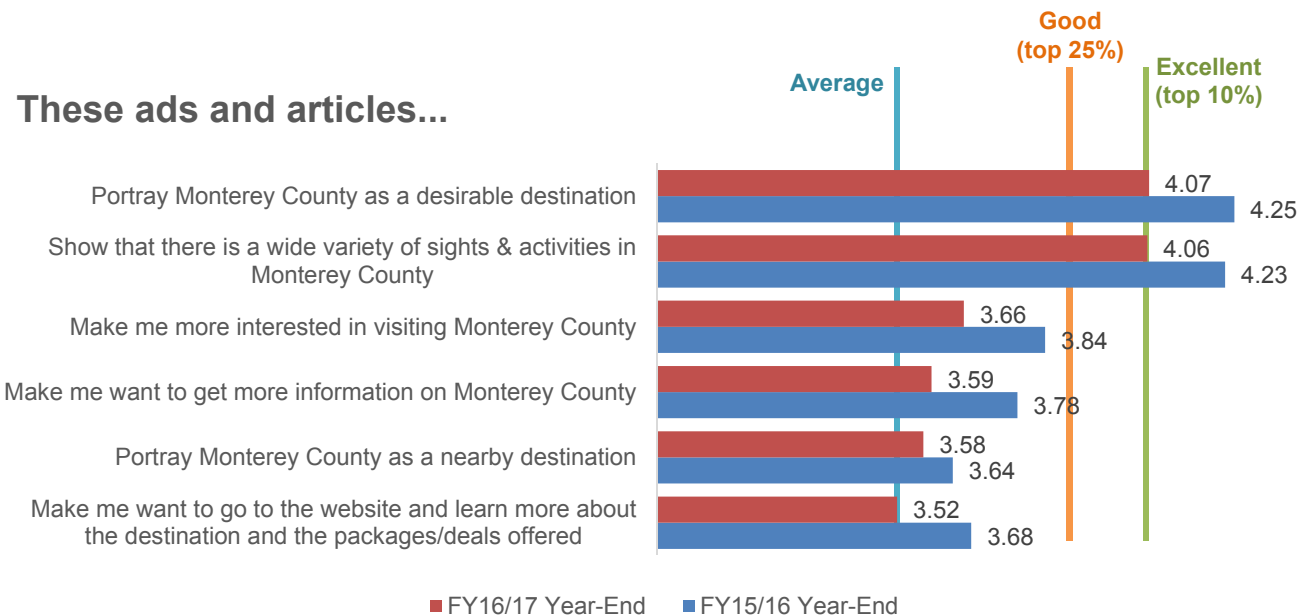
(Of those who recalled any news about Monterey County)





Year-End Creative Ratings

- The spring 2017 ads receive excellent ratings from Regional travelers for portraying the county as a desirable destination and showing the wide variety of experiences available, although the ratings are lower than year-end 15/16, which were exceptionally high.
- Both campaigns included print, email, digital, and social ads – each of which use similar copy and images – as well as native advertorials and social influencer blogs. It may be that the novelty of these new media has worn off or that consumer sentiments toward them are shifting. This will be something to track going forward.



Trip Specifics & Marketing Impacts

FY16/17 Year-End Research – Regional

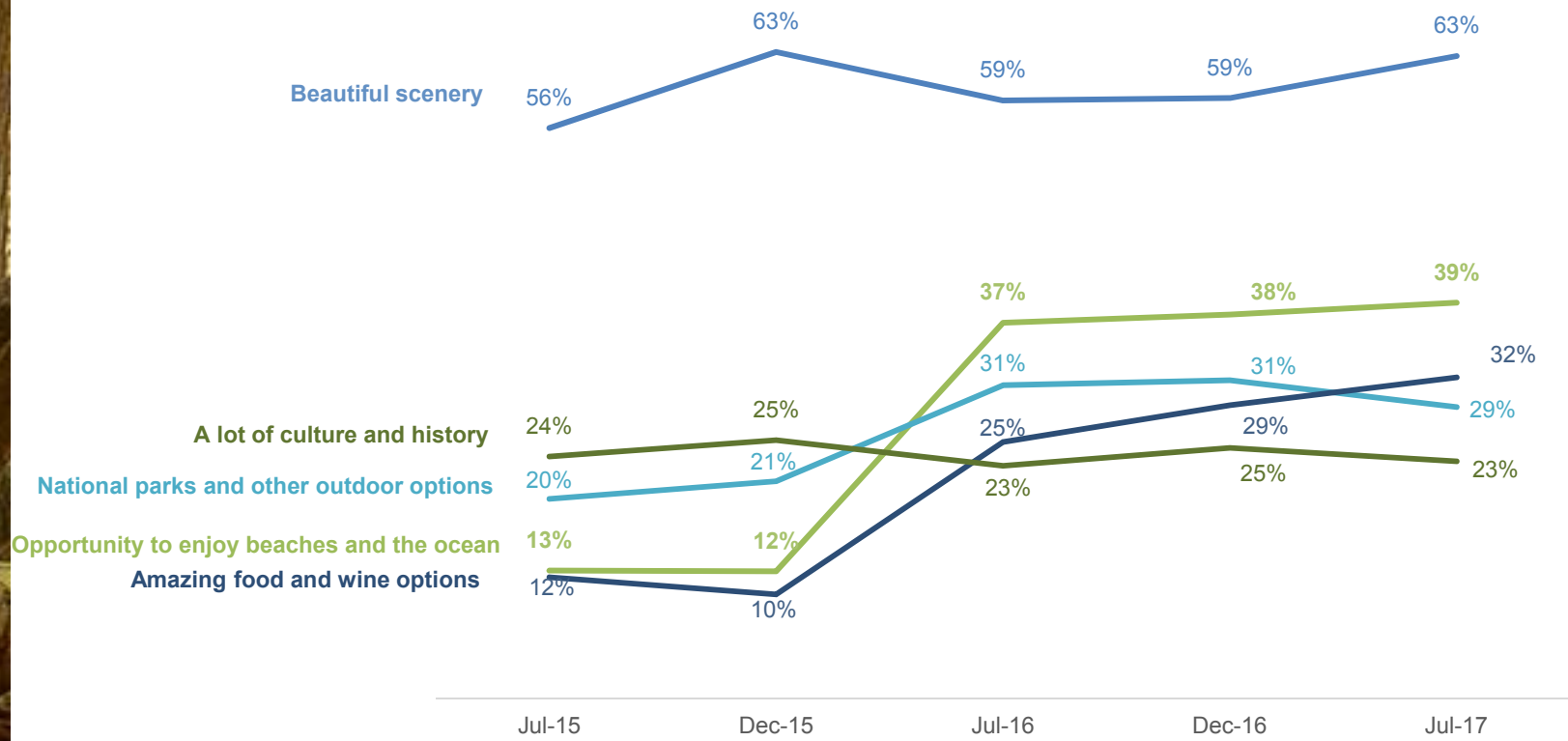
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Top 5 Regional Travel Motivators

- Scenery continues to lead leisure travel motivators, with beaches remaining in second place and food/wine climbing to nearly a third of travelers – topics that are the focus of several PR articles.
- Culture/history and national parks/outdoor remain flat.

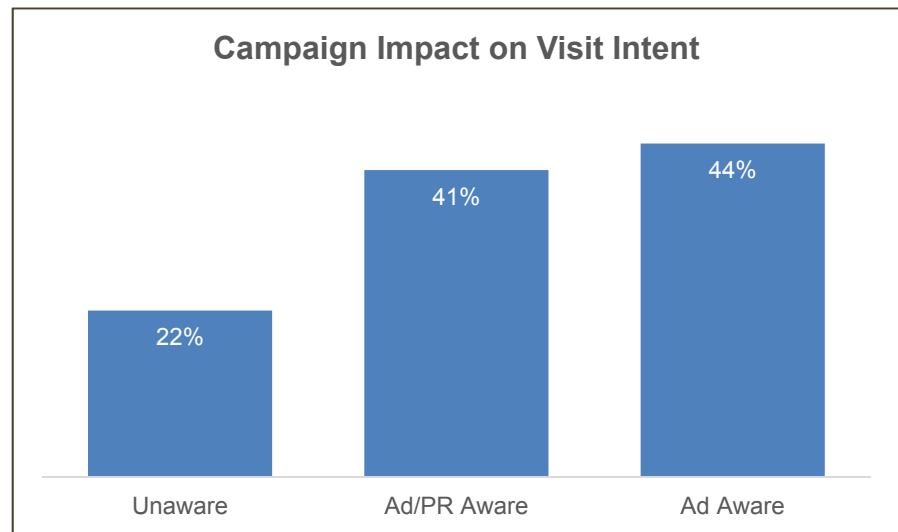
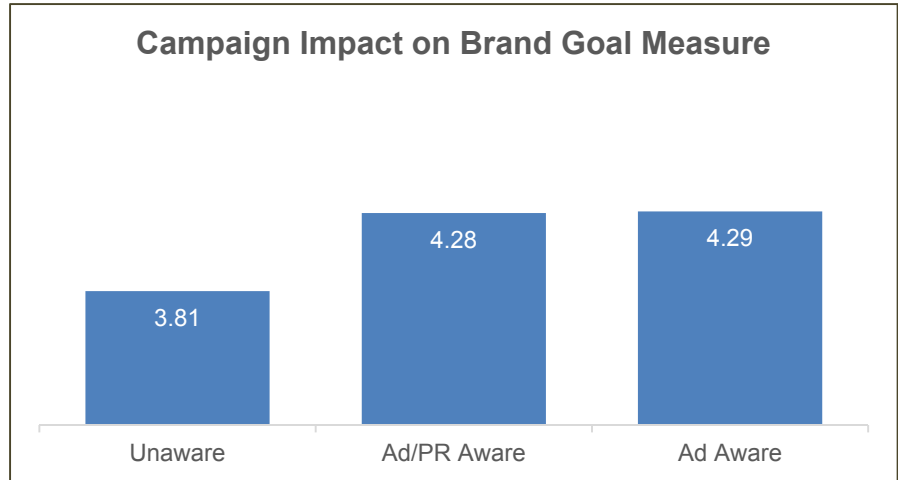
Attributes most likely to motivate travelers to visit a destination for a leisure trip





Impacts on Brand Goal & Visit Intent

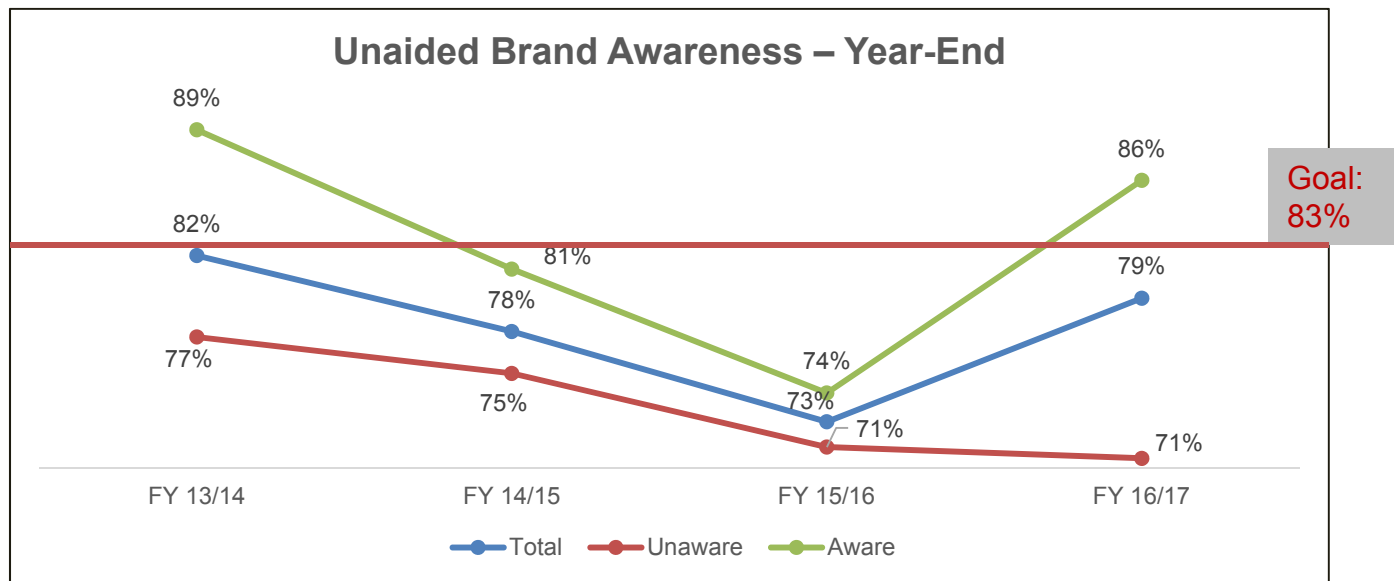
- The campaign positively impacts both the brand goal measure and likelihood to visit. Unaware travelers' responses are below the goal in both cases, and those aware of the campaign give responses that outperform the goals.
- While PR typically amplifies the positive impacts of the paid advertising, this seasonal measure shows that PR had a slight dampening effect on these measures. Given the nature of much of the news coverage, this makes sense. It also illustrates the importance of a strong advertising presence, as this messaging can be used to insulate the destination against PR that does not drive travel or interest.





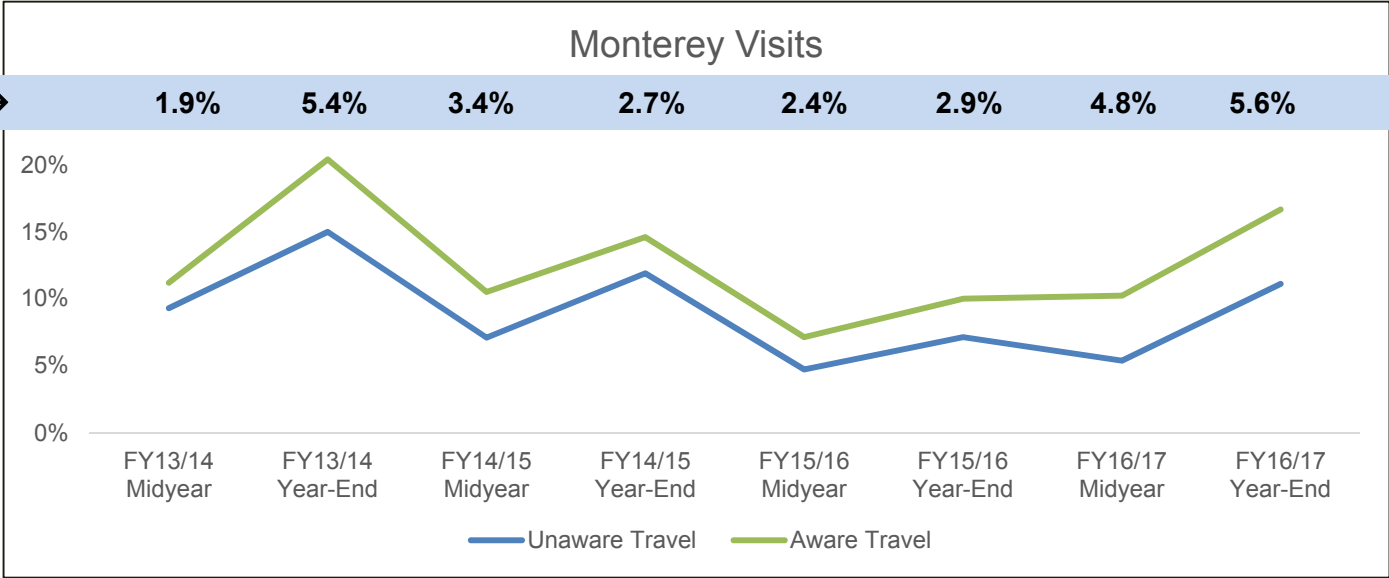
Impacts on Unaided Brand Awareness

- Unaided brand awareness, or top-of-mind familiarity with Monterey as a leisure destination, is another key performance indicator.
- As with other key metrics, the year-end marketing campaign – including both PR and paid ads – positively impacted the year-end measure of unaided brand awareness, boosting it above the 83% goal.
- This, too, illustrates that PR can be a double-edged sword: although coverage of the Highway 1 closure may not drive visit interest, it does keep the destination top-of-mind and, given Monterey County’s positive brand image, this can translate into higher visitation.





Incremental Overnight Travel



- The rate of visitation among those aware of the MCCVB paid advertising remains higher than the rate of unaware travel.
- As with campaign recall, travel is typically lower in the midyear measure (which measures fall travel) than at year-end (which measures spring and early summer travel).
- Not only is aware travel higher than since the first year of the GLBM campaign, but FY16/17 also saw the highest Regional travel increment to date.



Incremental Overnights & Trip Spending

Year-End Metrics	FY16/17
Aware HHs	5,442,391
Incremental Travel %	5.6%
Incremental Traveling HHs	302,355
Overnight %	67%
Incremental Overnights	201,570

Year-End Trip Spending	
Lodging/accommodations	\$355
Meals/food/groceries	\$214
Attractions	\$196
Shopping	\$154
Entertainment	\$54
Transportation	\$143
Other	\$59
Total	\$1,175

- The GLBM campaign influenced more than 200,000 spring 2017 visits to Monterey County.
- Average visit spending is on par with prior measures, and up somewhat from the fall 2016.

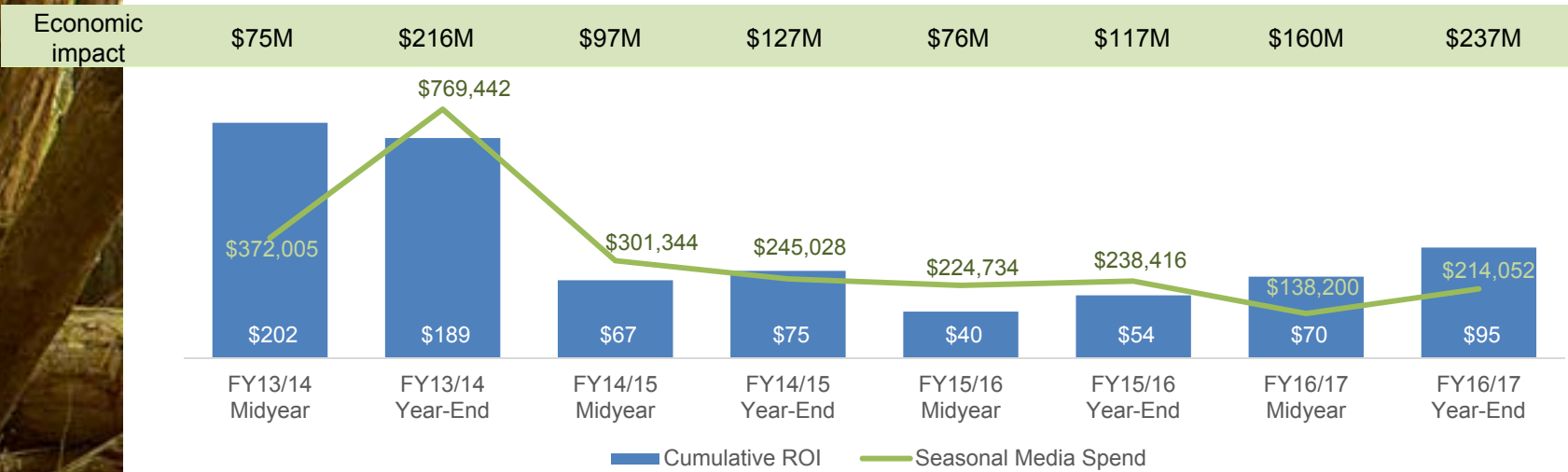


ROI

- As introduced in the midyear report, the ROI figures below show the continued positive return on the GLBM campaign, which has now run for eight consecutive seasons. The figures below divide each season's economic impact by the cumulative media spend.
- The paid advertising campaign through spring 2017 generated an ROI of \$95, which is the highest ROI measured since the year the campaign debuted. And this is despite consistent seasonal spending. The debut fall and spring campaign investments were much higher, which is necessary when launching a new campaign. And the subsequent maintenance-level spending in the region has generated lower but more consistent ROI figures.
- (The traditional ROI calculation is included in the appendix.)

GLBM Campaign ROI

Using cumulative ad-influenced visitor spending



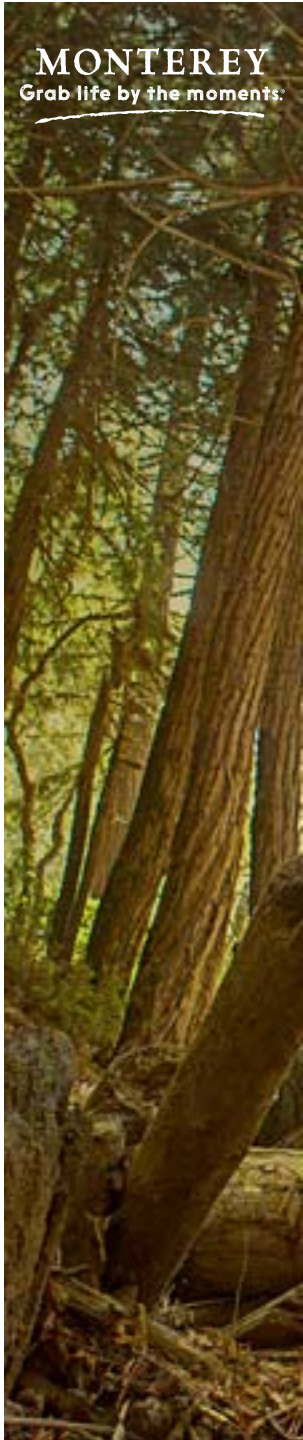


Ad-Influenced Room Nights

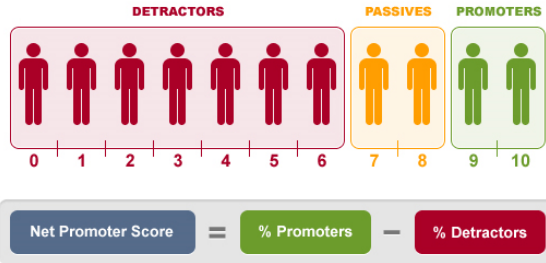
- Spring 2017 shows the highest volume of incremental overnight trips to date.
- Although the share staying in paid accommodations is significantly lower, trip length is higher than last year-end, leading to nearly 270,000 room nights attributable to the GLBM campaign.

Year-End Measures	FY13/14	FY14/15	FY15/16	FY16/17
Incremental overnight traveling HHs	187,160	120,195	109,908	201,570
% staying in paid accommodations	85%	79%	84%	50%
Incremental trips staying in paid accommodations	159,086	95,262	91,841	100,305
Avg. # nights on trip	2.2	3.4	2.3	2.7
Ad-influenced room nights	192,077	323,375	211,797	268,537

Using paid ads only



Desirability Index



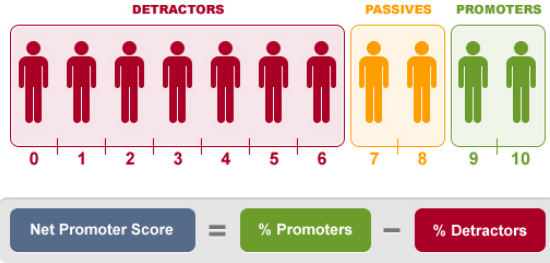
- The desirability index, which is analogous to a Net Promoter Score (NPS), is a way to compare traveler perceptions of Monterey County as a leisure destination to other destinations in the competitive set.
- The GLBM campaign moves Monterey County from the bottom half to the top of the competitive set for Regional travelers for a getaway trip destination. Although the index for Monterey County is lower than at mid-year, it is lower for all destinations, which could reflect a seasonal effect. And this measure does not account for the marketing efforts or PR coverage of the other destinations.

NPS for a Vacation or Getaway Trip

			Mid-year	Year-End	
San Diego	44	27	29	20	15
San Francisco	43	26	31	22	12
Monterey County - aware	40	28	32	24	8
Lake Tahoe	31	26	43	1	-12
Santa Barbara	26	26	48	-9	-22
Napa Valley	24	24	52	-10	-28
Monterey County - unaware	23	23	54	-22	-32
Palm Springs	21	23	56	-23	-34
San Jose/Santa Cruz	19	23	59	-25	-40
Sonoma Valley	18	22	59	-23	-41

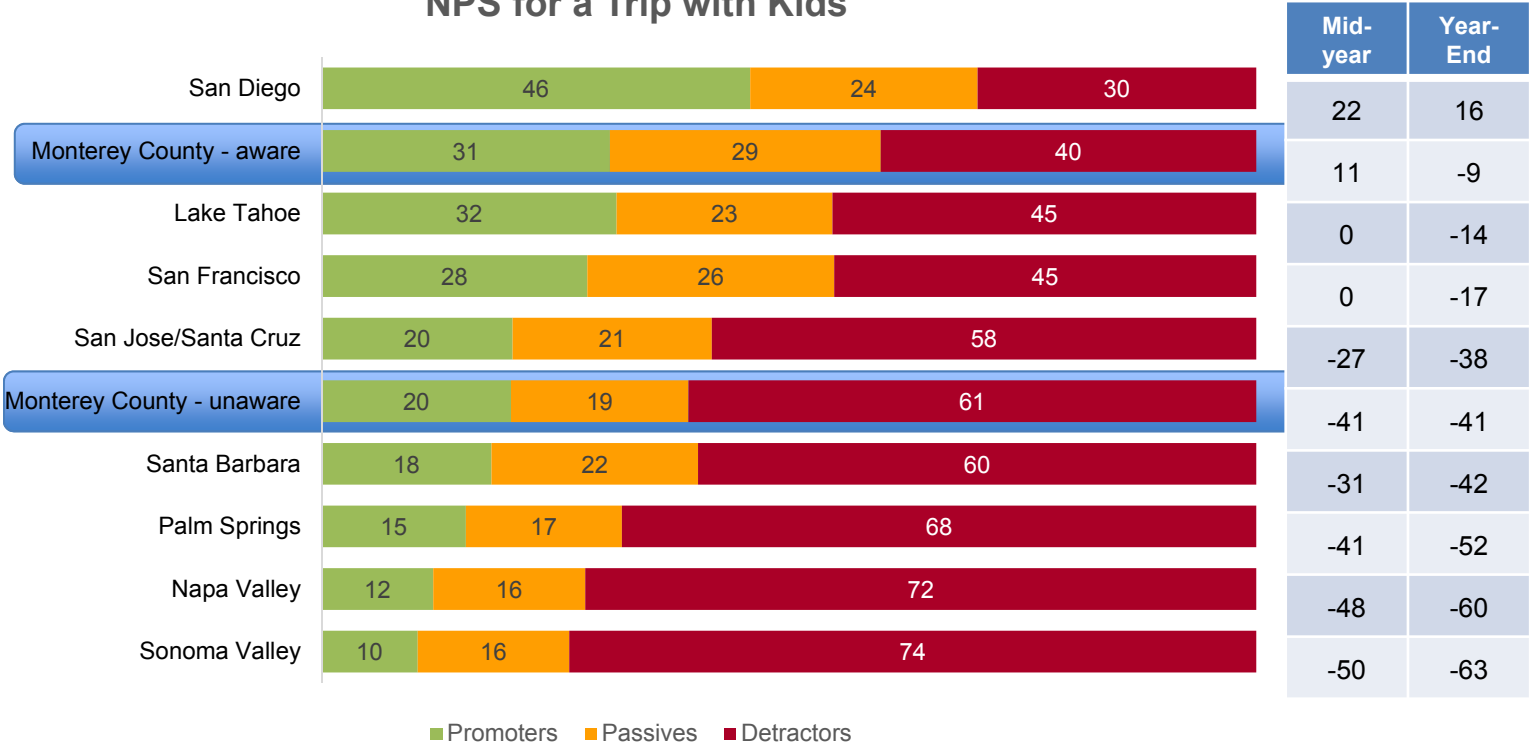


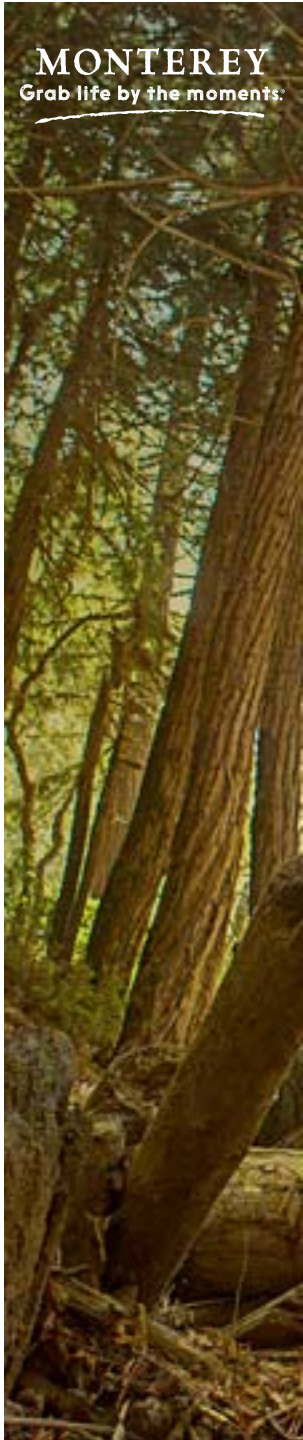
Desirability Index



- The campaign also boosts perceptions of Monterey County as a place to visit with children, although San Diego is still viewed as a more desirable place to go with kids.
- 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.

NPS for a Trip with Kids

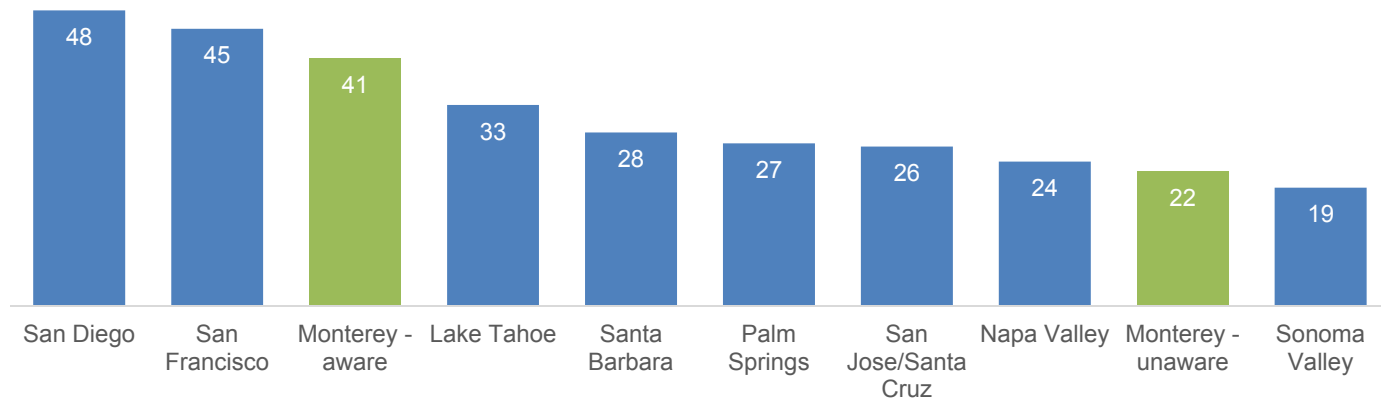




Intent to Visit

- This metric was designed to show how Monterey compares to other destinations in terms of the share of future visits. As with the desirability index, the campaign positively impacts Monterey’s competitive position.
- In fact, in terms of intention to visit these regional destinations in the coming two years, the marketing campaign brings Monterey in line with San Francisco and San Diego.

Share of Visit Intent (%)

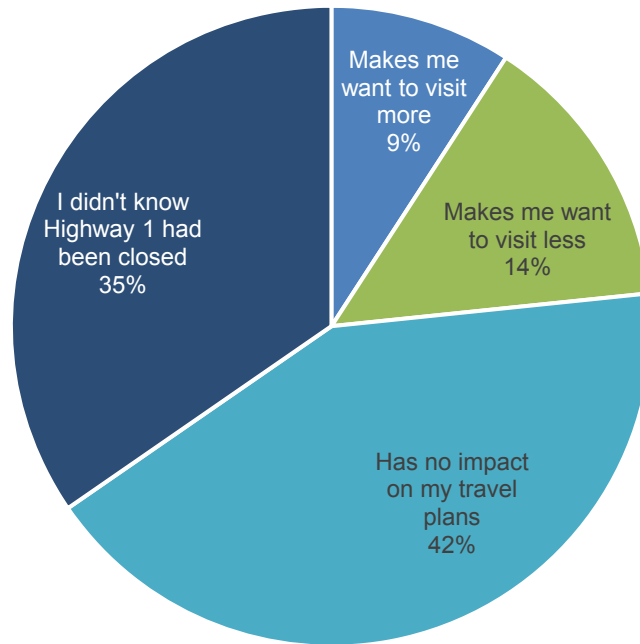




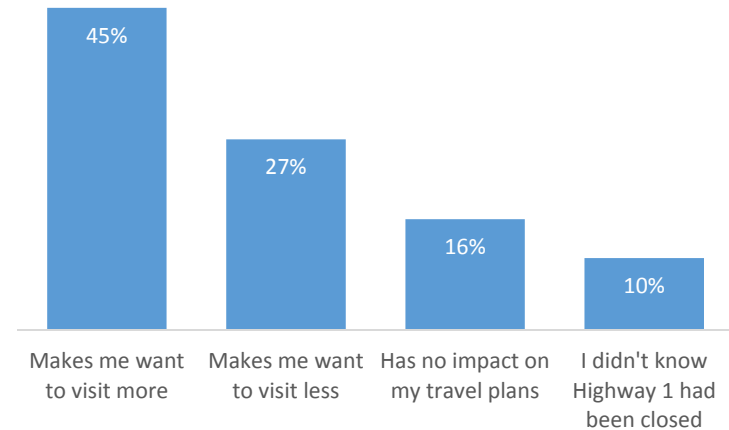
Impact of Big Sur Road Closure

- Travelers were asked how the recent closure of Highway 1 along the Big Sur Coast affected their likelihood to visit in the next 12 months.
- Notably, four in 10 travelers said the news had no impact on their travel plans. A third were unaware, and as indicated by the low level of visit intent, these are travelers who were already not intending to visit.
- Only 14% of Regional travelers said their plans were negatively impacted by the news. Nearly half of those who said the news increased their interest and intent to visit Monterey County in the next two years.

Impact on interest in visiting Monterey County



Visit Intent by News Awareness

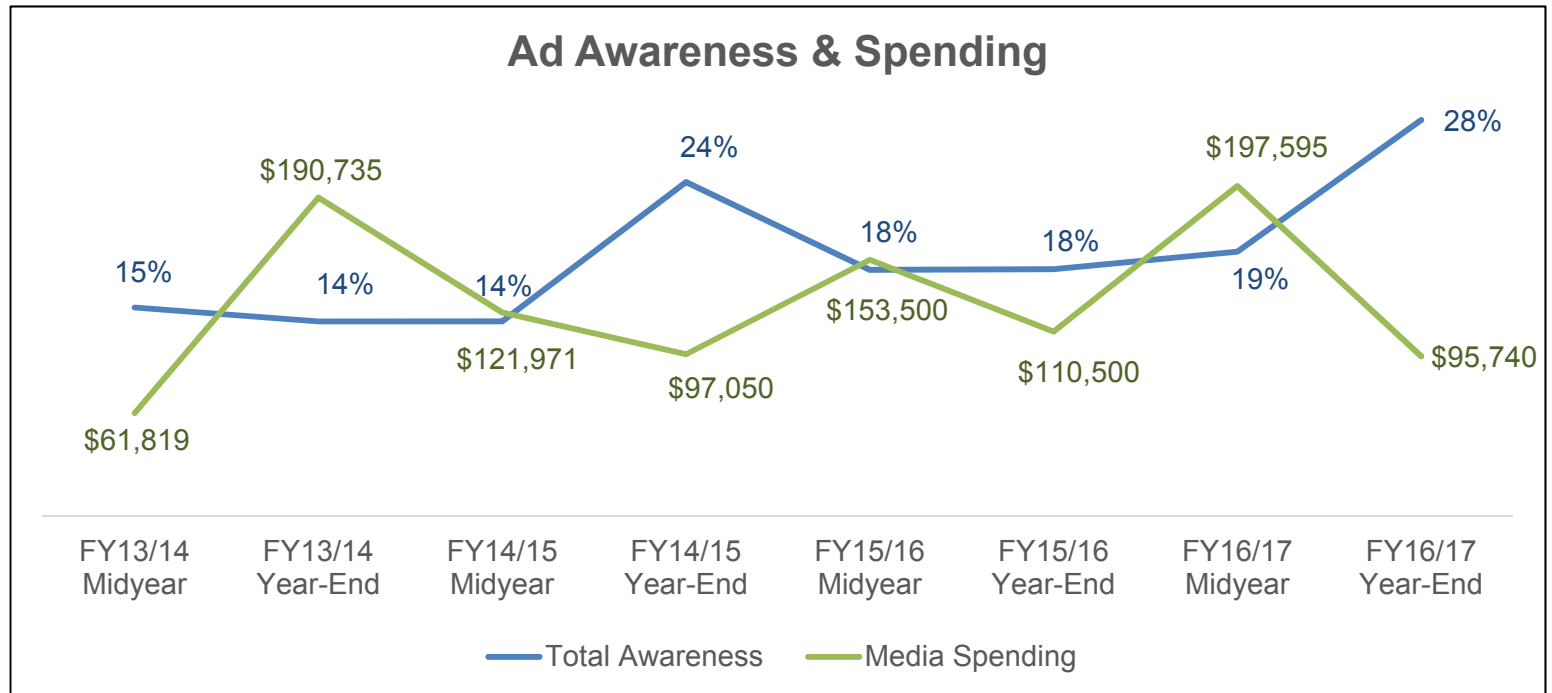


National Results Summary

FY16/17 Year-End Research

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National Advertising Awareness

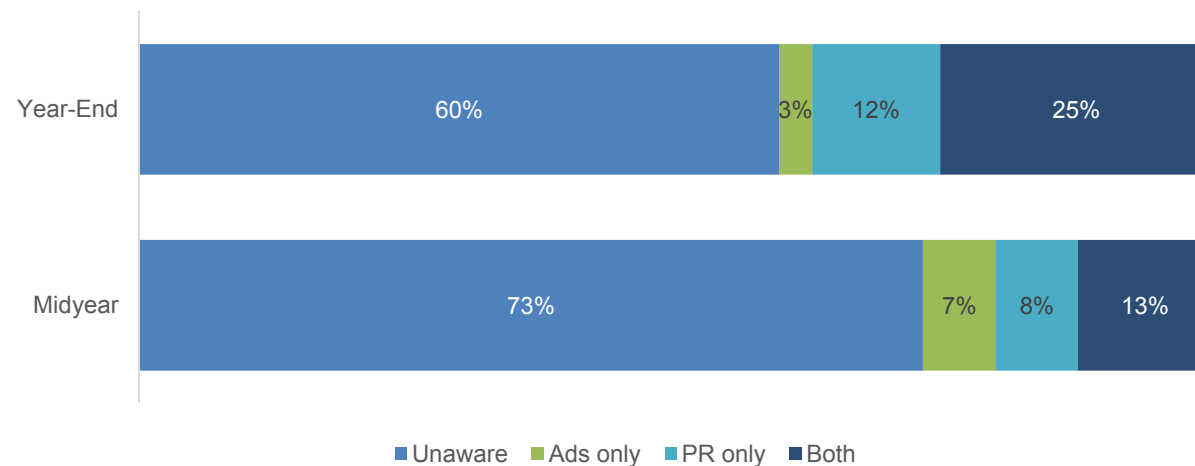


- Aided recall of MCCVB's paid advertising grew to its highest point yet, despite lower spending during the spring. Compared to Regional travelers who are closer to and more familiar with the destination, National audiences may take longer to respond to spending shifts.
- In fact, over time, jumps in recall trail high spending by about half a year, when spending is in the \$190K range. That said, we would expect lower recall during the coming midyear measure as a result of the sub \$100K spend this spring.

Ad/PR Overlap

- While recall of the ads is at 29%, the PR efforts helped extend the reach of the marketing. In the National markets, 37% of travelers recall public relations featuring Monterey County. In all, marketing awareness is at 40%.
- However, as with Regional travelers, a share of the National PR recall is attributable to the news of the Big Sur landslides and Highway 1 road closure, so this awareness should be treated carefully.

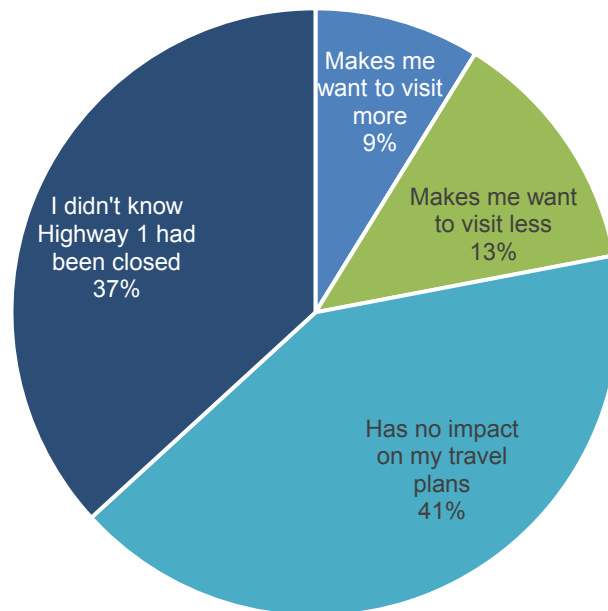
FY16/17 Awareness Overlap



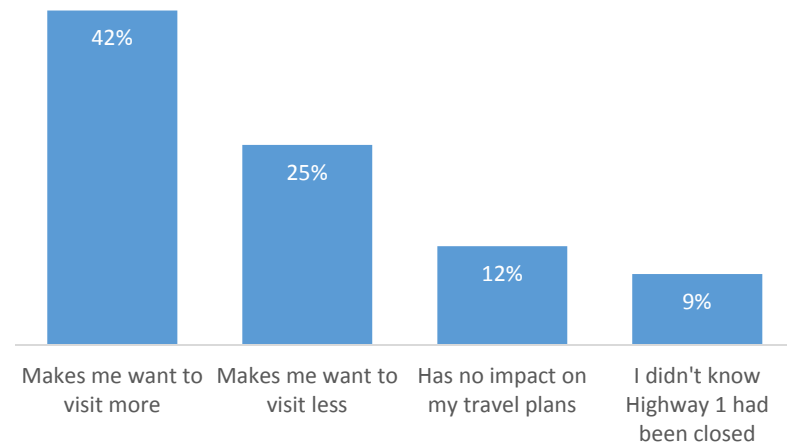
Impact of Big Sur Road Closure

- When asked how the recent closure of Highway 1 along the Big Sur Coast affected their likelihood to visit Monterey County, National travelers responded almost identically to Regional travelers: four in 10 said it had no impact; a third were unaware; and fewer than 15% said the news made them less interested in a visit.

Impact on interest in visiting Monterey County

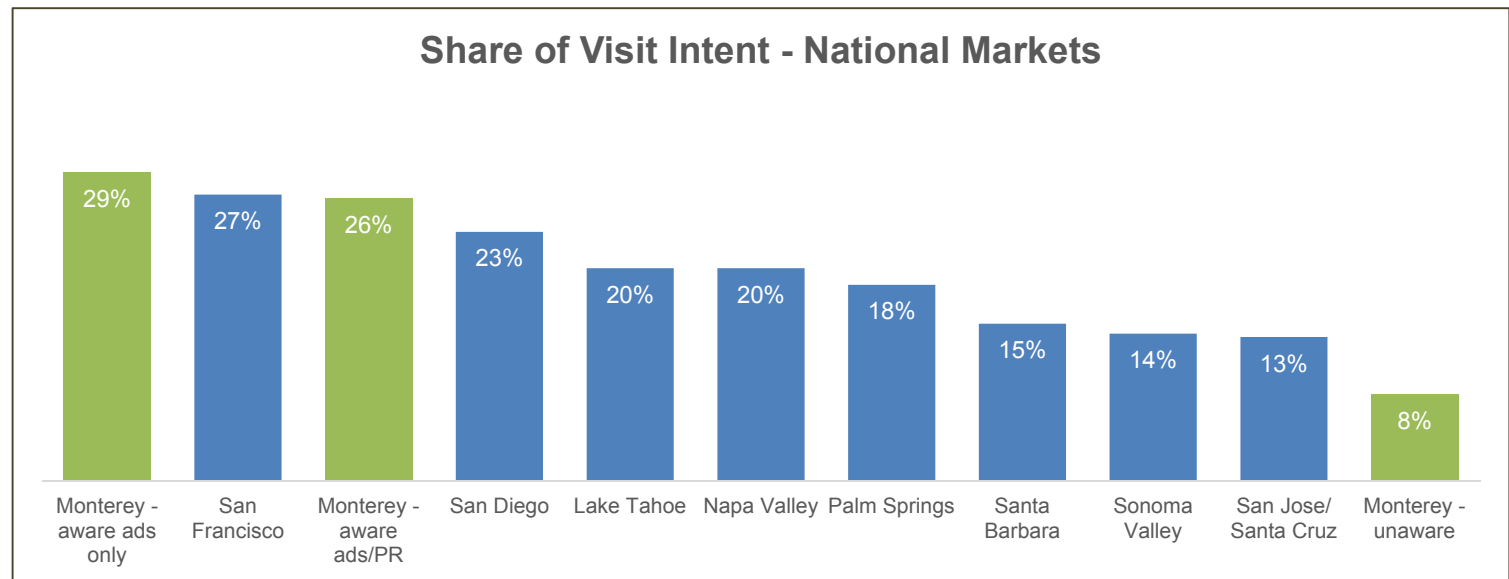


Visit Intent by News Awareness



Intent to Visit

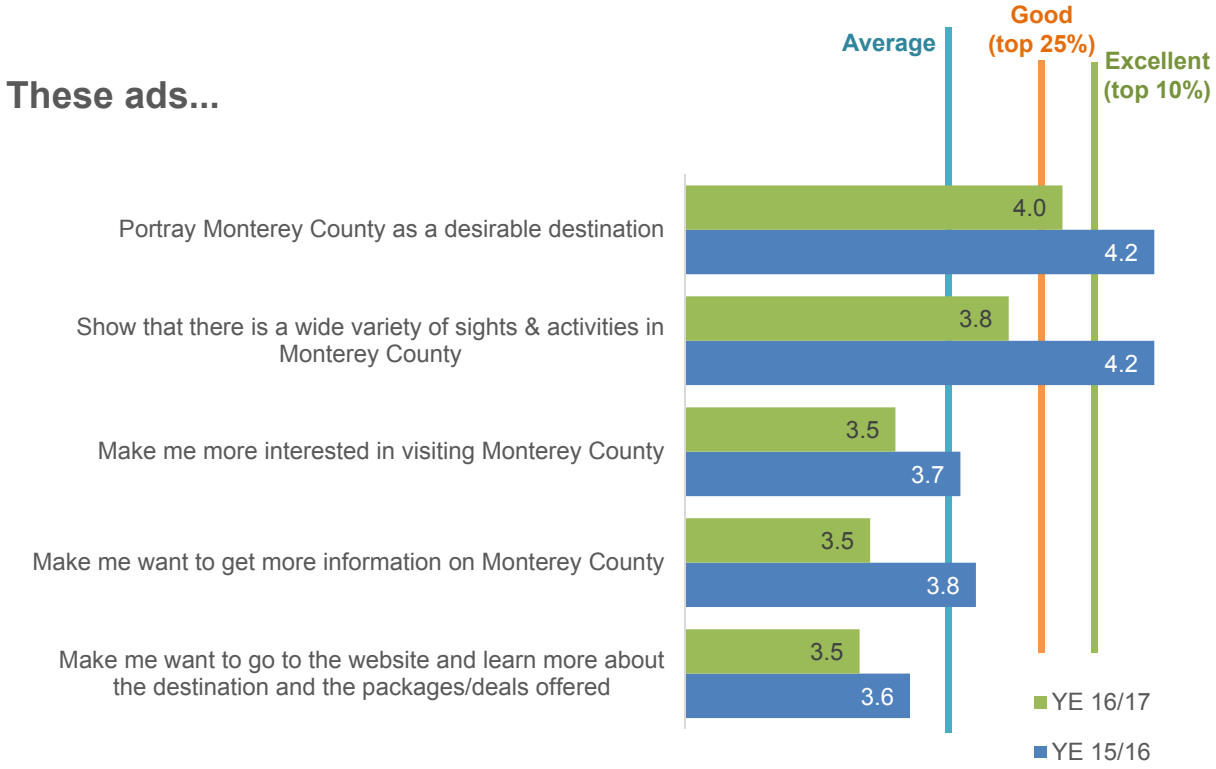
- Comparing shares of travelers who are likely to visit destinations in the competitive set, the marketing campaign moves Monterey from the least to the most likely place to visit. And, as with Regional travelers, the ad campaign itself boosts visit intent even higher than the ad/PR combination, due to the nature of the PR information.





Creative Evaluation

- National travelers rate the spring 2017 ads as excellent for portraying Monterey County as desirable. However, these ads are rated lower than last year's ads, as the Regional data also reflected.



General Visit Motivators

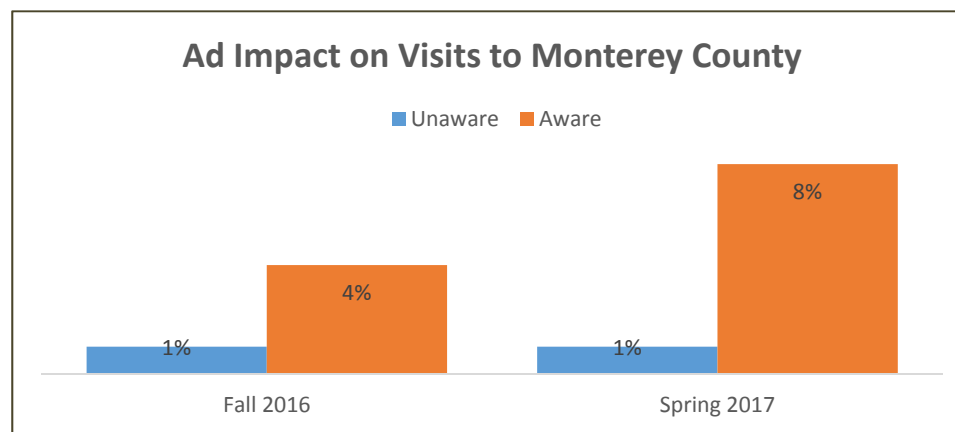
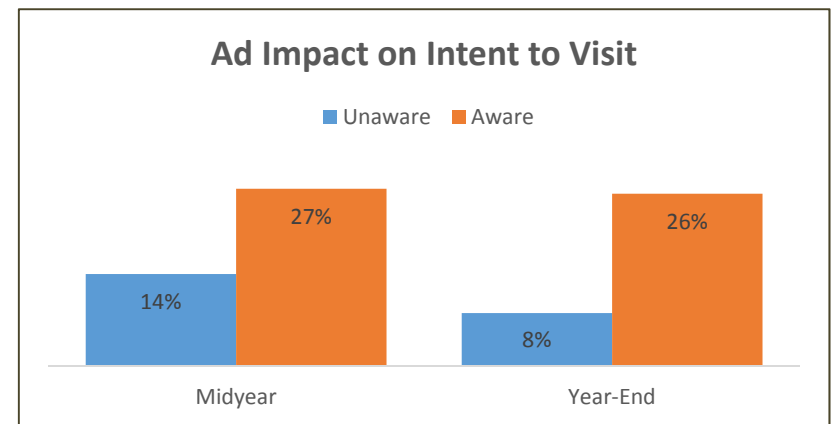
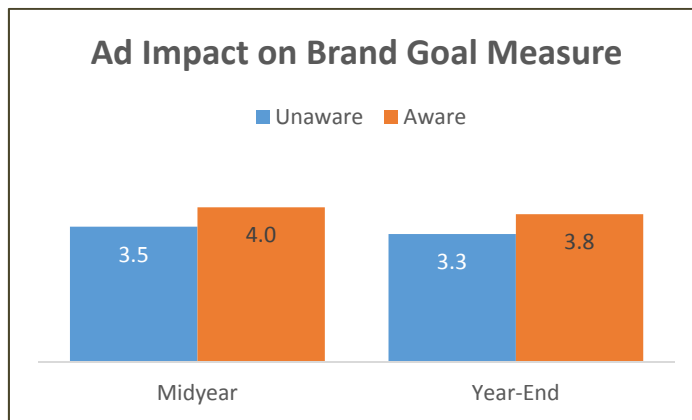
- As with Regional markets, scenery leads among attributes that motivate National travelers to visit a leisure destination, followed by beaches and other outdoor options and food and wine. These metrics have not changed very much since the midyear measure.

Attributes most likely to motivate a leisure trip to a particular destination



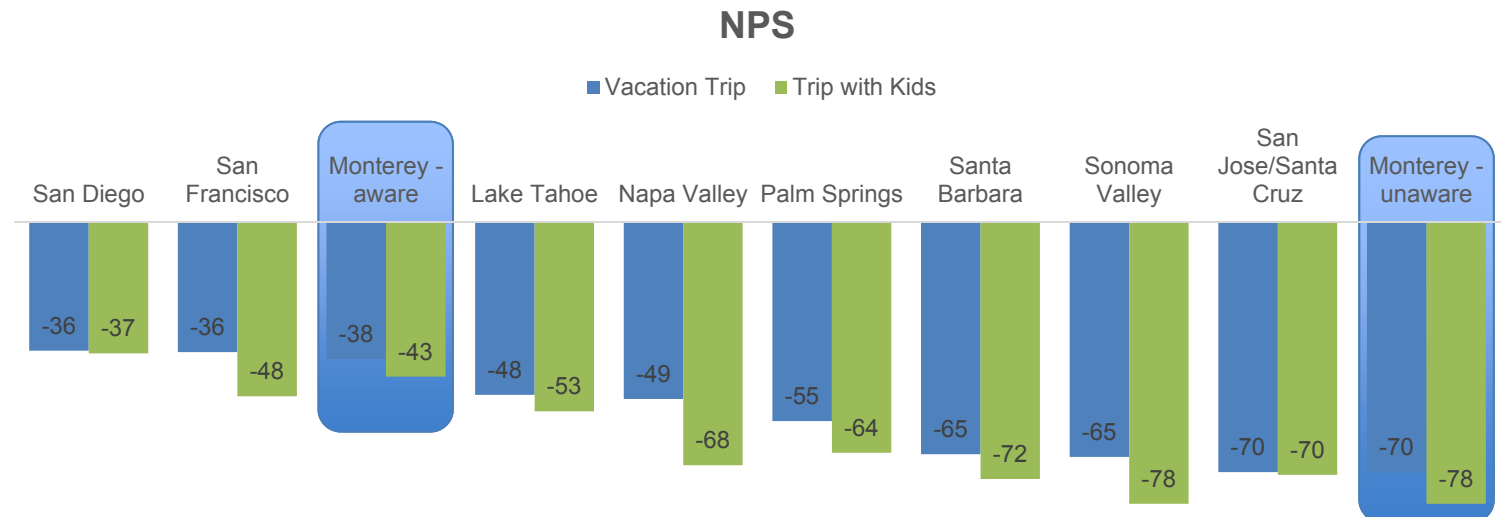
Year-End Ad Impacts

- Among National audiences, the marketing campaign positively impacts the brand goal measure, visit intent and recent visitation.



Desirability Index (NPS)

- The desirability index (net promoter score) is a reflection of consumers' views of the whole destination experience – which include transportation, lodging and costs. For this reason, NPS scores can be negative, as they are in the graph below; the importance is in the relative position of each destination in the competitive landscape. All of the destinations are located on the West Coast, which is a long, expensive trip for many in the National markets.
- As in the Regional markets, National travelers aware of the campaign view Monterey County as second only to San Diego for a trip with kids, and just behind San Diego and San Francisco as a vacation destination. Without the campaign, Monterey has the lowest rating among the National audience.



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Grab life by the moments:

A photograph of two women riding horses on a beach at sunset. The sky is a deep blue with many small, glowing bubbles or light particles scattered throughout. The women are smiling and looking towards the camera. The horses are dark brown. The beach and ocean are visible in the background.

Appendix

Methodology

- To measure the success of the seasonal efforts, MCCVB partnered with Strategic Marketing & Research Insights (SMARInsights) to conduct a baseline measure in April 2013, with subsequent measures every six months.
- Advertising/communication impact is assessed by measuring the differences in perceptions and behaviors between those who have been exposed to the various marketing channels and those who have not.
- The survey is administered online so that respondents can see and hear the marketing materials, resulting in a representative awareness assessment.
- This current research wave's data were collected in June 2017. A total of 1,275 interviews were completed in the target markets of interest.
- The sample size was larger in the nearby markets, where resources were concentrated. The nearby and direct flight markets are referred to as "Regional markets."
- Upon completion of data collection, a dataset was compiled, cleaned and coded for analysis. Data were weighted to be representative of the household populations in the geographic markets.

Date	Research Wave
April 2013	Pre-Brand Launch
Dec. 2013	FY13/14 Midyear
June 2014	FY13/14 Year-End
Dec. 2014	FY14/15 Midyear
June 2015	FY14/15 Year-End
Dec. 2015	FY15/16 Midyear
June 2016	FY15/16 Year-End
Dec. 2016	FY16/17 Midyear
June 2017	FY16/17 Year-End

Campaign Spending

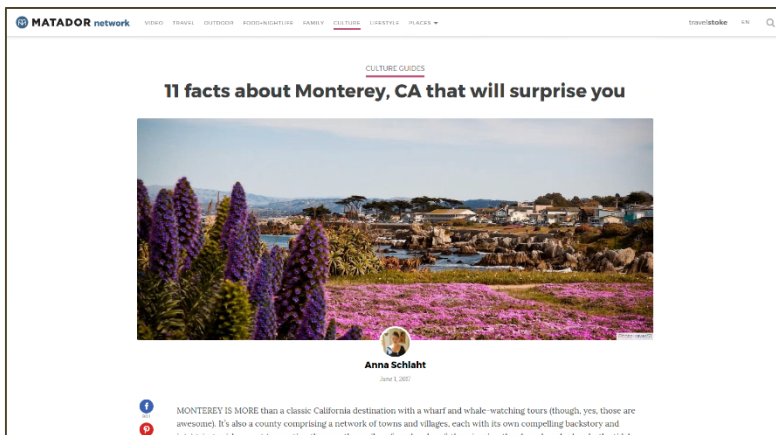
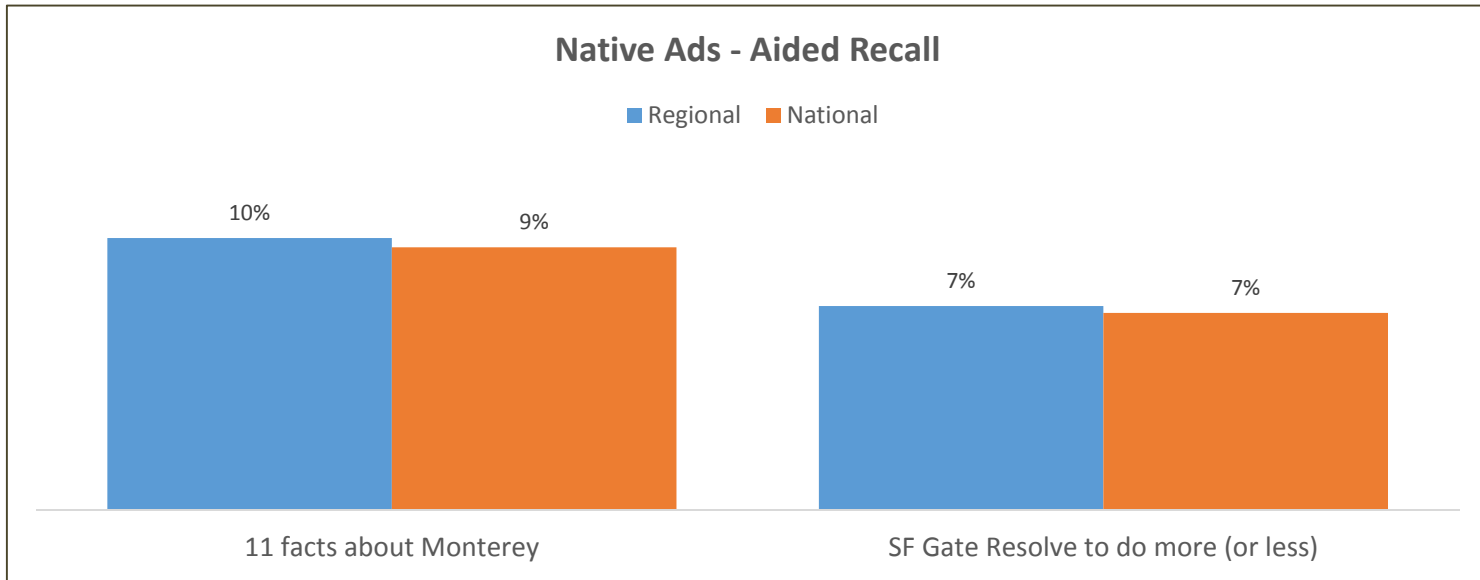
	FY13/14			FY14/15			FY15/16			FY16/17		
	National	Regional	Total	National	Regional	Total	National	Regional	Total	National	Regional	Total
Q1 (July-Sept.)	\$0	\$45,758	\$45,758	\$50,624	\$177,005	\$227,629	\$72,250	\$119,696	\$191,946	\$29,547	\$69,100	\$98,647
Q2 (Oct.-Dec.)	\$61,819	\$326,247	\$388,066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

REGIONAL ECONOMIC IMPACT

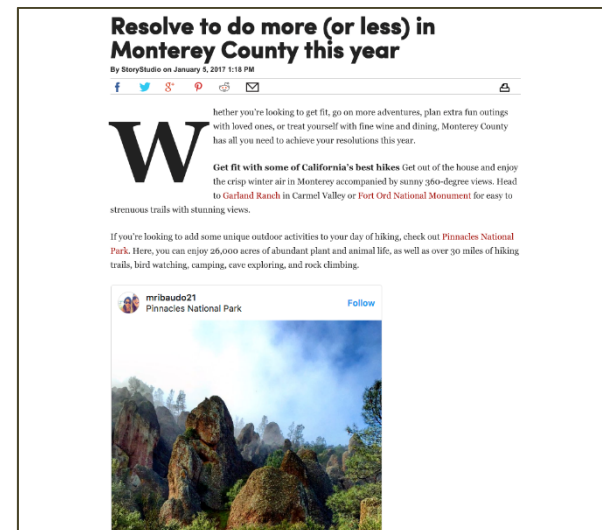
- The table below shows the traditional method for calculating the ROI of each seasonal campaign as a stand-alone effort. The economic impact after the spring 2017 campaign is \$237M, which is higher than any measure of economic impact since the year-end FY13/14 measure.
- Attributing the full \$237 million impact to the singular spring 2017 campaign generates an ROI of over \$1,100. This figure is shown to enable comparison to prior measures, and to illustrate the benefit of a holistic marketing effort that incorporates strong creative and builds over time.
- As reported at midyear, using this methodology to evaluate this campaign is not reflective of the complete marketing effort. The \$95 ROI shown in the body of the report is a more useful and defensible measure.

Total Regional	FY13/14		FY14/15		FY15/16		FY16/17	
	Midyear	Year-End	Midyear	Year-End	Midyear	Year-End	Midyear	Year-End
Incremental Overnight Traveling HHs	67,315	187,160	93,263	120,195	73,257	109,908	156,000	201,570
Average Trip Spending	\$1,119	\$1,111	\$1,038	\$1,059	\$1,036	\$1,060	\$1,028	\$1,175
Economic Impact	\$75,325,738	\$216,258,111	\$96,786,586	\$127,290,675	\$75,868,365	\$116,502,719	\$160,334,159	\$236,919,474
Traditional ROI Calculation	\$202	\$281	\$321	\$519	\$338	\$489	\$1,160	\$1,107

NATIVE ADVERTORIALS



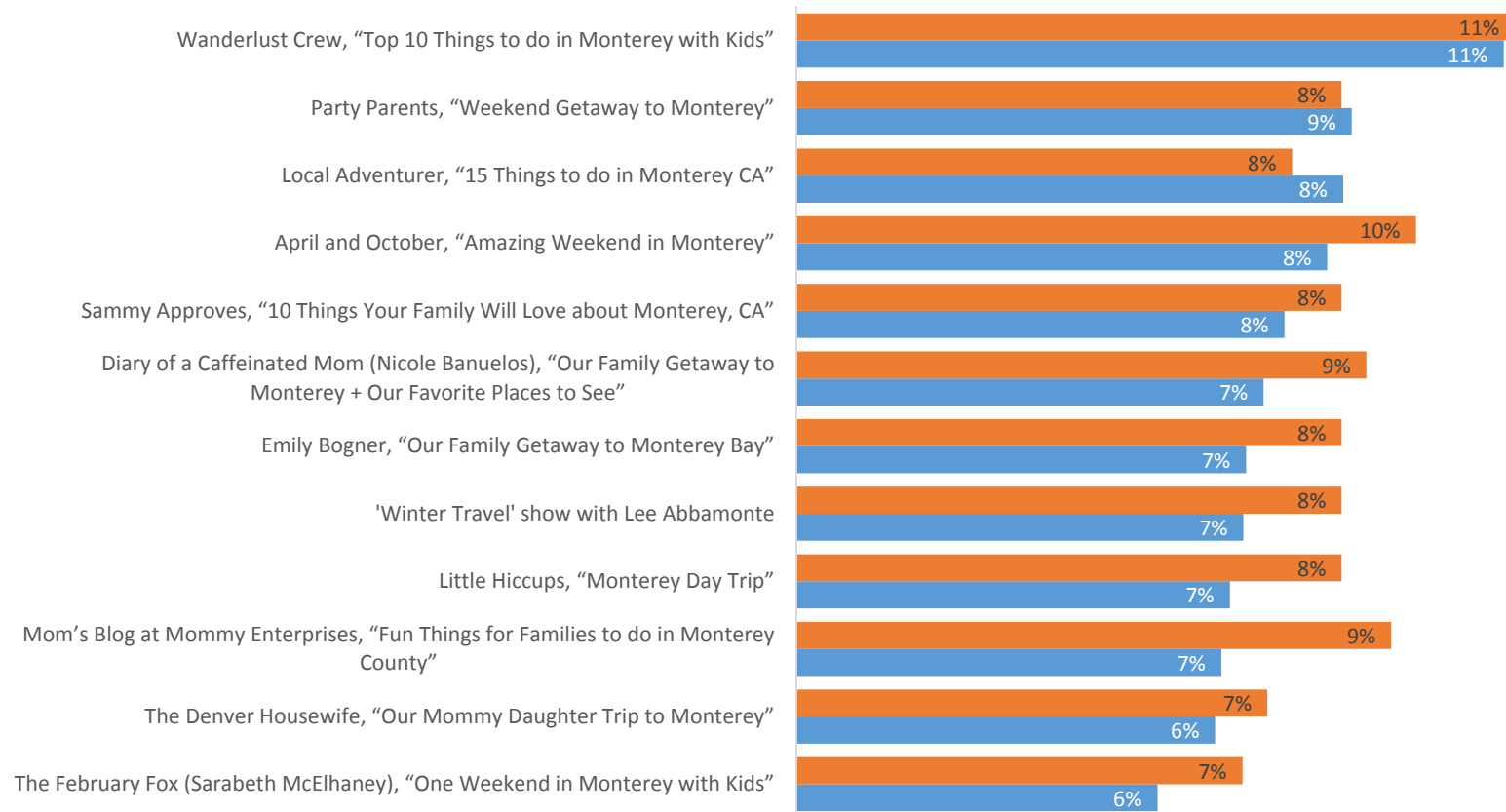
smarinsights.com



SOCIAL INFLUENCERS

Aided Recall

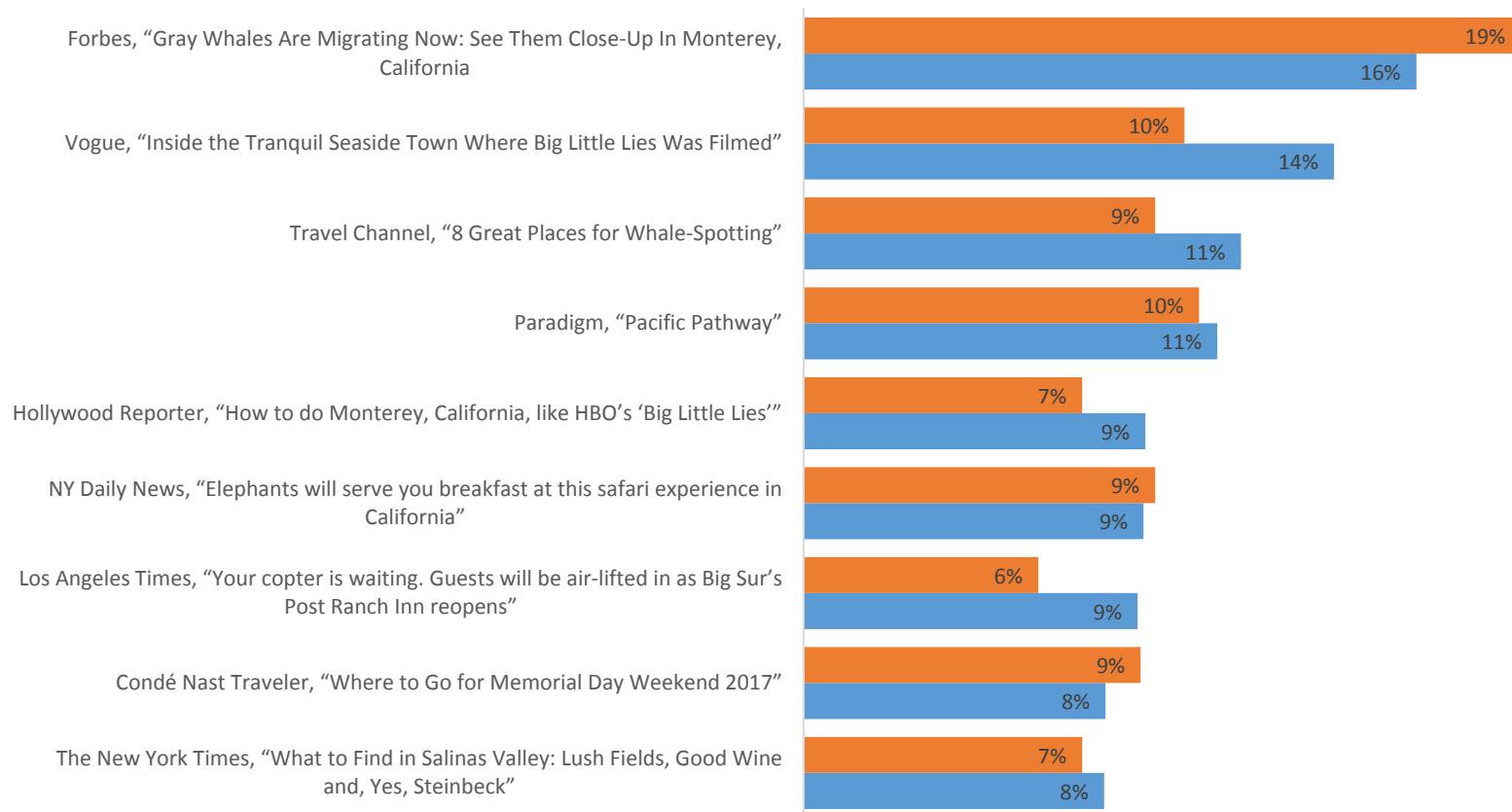
■ National ■ Regional



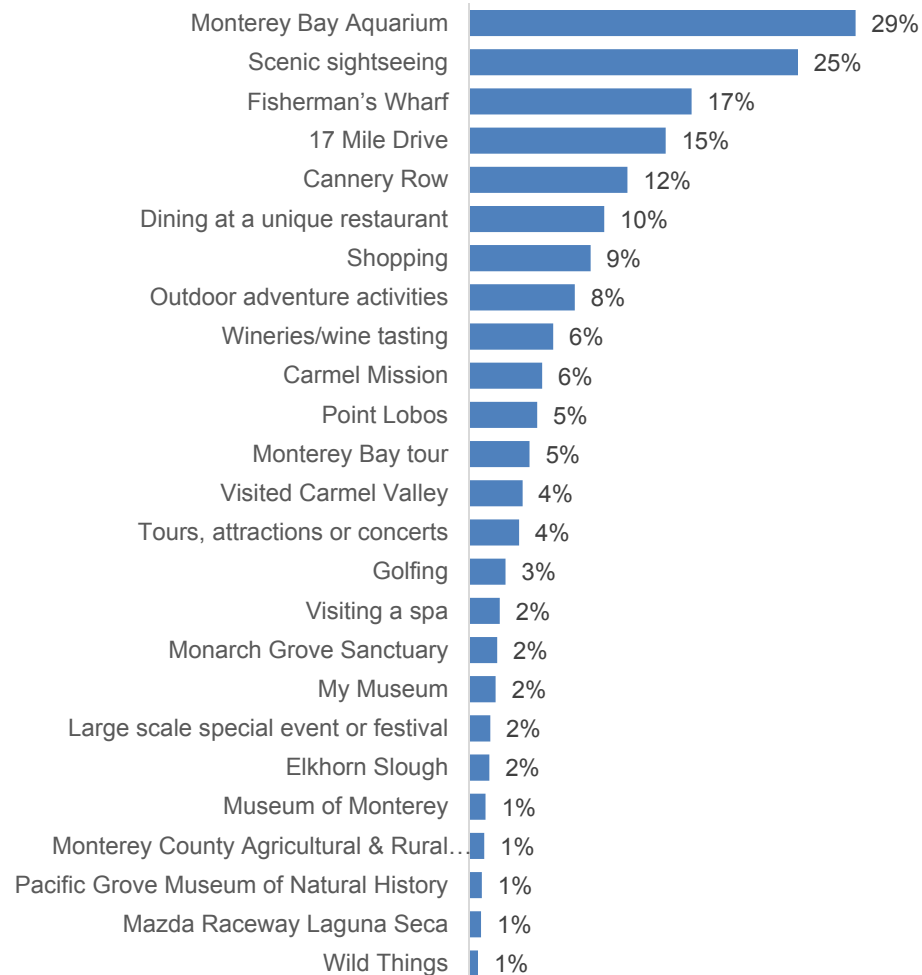
PR ARTICLES

PR Articles - Aided Recall

■ National ■ Regional



MONTEREY VISIT MOTIVATORS – REGIONAL



Questionnaire

Monterey County CVB
Brand & Advertising Survey – YEAR END
FY16/17 ROI Questionnaire – June 14, 2017
Goal field date: June 19

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

SCREENERS

What is your ZIP code? _____

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

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

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

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

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

TRAVEL HABITS & MONTEREY COUNTY VISITATION

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

	Vacation Trip	Getaway Trip
None		
One		
Two		
Three		
Four or more		

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- 1 -

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

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

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

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

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

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

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

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- 2 -

Questionnaire

MONTEREY COUNTY VISITOR IF Q3 = BIG SUR, CARMEL, MARINA, MONTEREY, MOSS LANDING, PEBBLE BEACH, PACIFIC GROVE, SALINAS OR SEASIDE.
IF Q3 DOES NOT EQUAL MONTEREY COUNTY VISITOR, SKIP TO Q16b (IMAGE & VISIT INTENT).

NPS FOR COMPETITIVE SET – USE FOR DESIRABILITY INDEX

4. How likely are you to recommend each of the following places to your friends or family as a destination to visit...[SHOW ENDINGS BELOW IN BLUE FONT TO CALL OUT]
_1. for a vacation or getaway trip?
_2. with children?

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

TRIP SPECIFICS

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

ALLOW MULTIPLES

	January 2016	January 2017
	February 2016	February 2017
	March 2016	March 2017
	April 2016	April 2017
	May 2016	May 2017
	June 2016	June 2017
July 2015	July 2016	
August 2015	August 2016	
September 2015	September 2016	
October 2015	October 2016	
November 2015	November 2016	
December 2015	December 2016	

IF MULTIPLE VISITS, ASK Q4A.

- 4a. Which of these Monterey trips do you consider to be your “primary” leisure trip? This is the trip in which you did the most stuff/stayed the longest.
SHOW MONTHS VISITED FROM TRIP.

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

4. Where within Monterey County did you go on this MONTH YEAR trip?
- Big Sur
 - Carmel
 - Marina
 - Monterey
 - Moss Landing
 - Pacific Grove
 - Pebble Beach
 - Salinas

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- Seaside
- Other, please specify _____
- None of these

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

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

ASK Q5A IF Q5 = 2 OR 3

- 6a. Where else did you visit? _____

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

- A getaway trip
- A vacation
- A visit to friends or relatives
- A visit to a specific activity or event. Please specify _____

7. Was your MONTH YEAR trip...?

- An overnight trip
- A day trip

ASK Q9 AND Q10 ONLY IF Q7 = OVERNIGHT TRIP

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

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

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

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

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

Monterey Bay Aquarium	
Cannery Row	
Fisherman's Wharf	
17 Mile Drive	
Mazda Raceway Laguna Seca	
National Steinbeck Center	
My Museum	

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Wild Things	
Monarch Grove Sanctuary	
Pacific Grove Museum of Natural History	
Carmel Mission	
Museum of Monterey	
Monterey County Agricultural & Rural Life Museum	
Wineries/wine tasting	
Point Lobos	
Scenic sightseeing	
Monterey Bay tour	
Visiting a spa	
Tours, attractions or concerts	
Outdoor adventure activities	
Golfing	
Dining at a unique restaurant	
Shopping	
Large scale special event or festival	
Visited Carmel Valley	
Elkhorn Slough	
Other, please specify	
None	

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

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

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

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

12. Which best describes your travel party for this MONTH YEAR trip?
Couple
Family traveling with children
Extended family
Women-only trip
Men-only trip
Other, please specify _____

13. Thinking about this MONTH YEAR trip, how far in advance did you begin to plan?
1...Less than one week
2...One to two weeks
3...Two to three weeks
4...Three to four weeks
5...One to two months
6...Three to four months
7...More than four months in advance
8...Don't know

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- 5 -

14. Thinking about your overall travel experience in Monterey County, would you say it was...?
1. Poor
2. Fair
3. Good
4. Very good
5. Excellent

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

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

IMAGE & VISIT INTENT

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

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

[Q16 USED FOR VISIT INTENT INDEX – ASK OF ALL RESPONDENTS]

16. How likely are you to visit each of the following areas in the next 24 months for a leisure trip?

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

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

Makes me want to visit more
Makes me want to visit less
Has no impact on my travel plans
I didn't know Highway 1 had been closed

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- 6 -

Questionnaire

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

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

ADVERTISING SECTION

Next you will be shown travel advertisements to find out if you recall seeing these ads. Please take a moment to view the ads and answer the questions. [ROTATE MEDIA; ROTATE ADS WITHIN MEDIA]

Digital (I:\Ads Master\Monterey\2016-2017 Ad Effectiveness\16-17year-end\Items for SMARI 16-17 round 2\Paid Ads-Banners_print-email\Digital Ads)

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

BigL. [SHOW ADS IN GRID WITH YES/NO BY EACH] Have you seen this digital ad before now?

Email (I:\Ads Master\Monterey\2016-2017 Ad Effectiveness\16-17year-end\Items for SMARI 16-17 round 2\Paid Ads-Banners_print-email\Email Ads)

Big Sur Email Blast.jpg	LA Tavel Magazine Email - Winter Sweepstakes 2016.jpg

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Email1. [SHOW ADS IN GRID WITH YES/NO BY EACH] Have you seen this email ad before now?

Print (I:\Ads Master\Monterey\2016-2017 Ad Effectiveness\16-17year-end\Items for SMARI 16-17 round 2\Paid Ads-Banners_print-email\Print Ads)

160808_MCCVB_SF_TravelVisitors_Guide.jpg	sf_chronicle_co-op_march2017_final.jpg	sfchronicle_beach_strip_march2017_final.jpg










Print1. [SHOW ADS IN GRID WITH YES/NO BY EACH] Have you seen this newspaper ad before now?

SOCIAL [DO NOT ASK IF NO TO SOCIAL MEDIA IN SCREENER GRID] (I:\Ads Master\Monterey\2016-2017 Ad Effectiveness\16-17year-end\Items for SMARI 16-17 round 2\Social Content\Social Posts)






Big Sur Bixby Bridge.jpg	Bloom.jpg	Cannery Row.jpg
Coastal Trail.jpg	Free.jpg	Lovers Point.jpg
McWay Falls.jpg	Point Lobos.jpg	SeeMonterey.jpg

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Questionnaire

		
Whale.jpg		
Social1. [SHOW ADS IN GRID WITH YES/NO BY EACH] Have you seen this Facebook post before now?		
Native Advertisorials (I:\Ads Master\Monterey\2016-2017 Ad Effectiveness\16-17year-end\Items for SMARI 16-17 round 2\Paid Content- Advertorials)		
		
Matador Network 11 facts about Monterey,CA.jpg	SF Gate Resolve to do more (or less).jpg	
Native1. [SHOW ADS IN GRID WITH YES/NO BY EACH] Have you seen this story online before now?		
Social Influencers (I:\Ads Master\Monterey\2016-2017 Ad Effectiveness\16-17year-end\Items for SMARI 16-17 round 2\Social Content\Social Influencers) [SHOW INFLUENCER NAME/TITLE BESIDE PICTURE WITH YES/NO FOR EACH]		
		
April and October, "Amazing Weekend in Monterey"	The Denver Housewife, "Our Mommy Daughter Trip to Monterey"	Emily Bogner, "Our Family Getaway to Monterey Bay"
April & October.jpg	Denver Housewife.jpg	Emily Bogner.jpg
		
The February Fox (Sarabeth McElhane), "One Weekend in Monterey with Kids"	Little Hiccups, "Monterey Day Trip"	Local Adventurer, "15 Things to do in Monterey CA"
February Fox.jpg	Little Hiccups.jpg	Local Adventurer.jpg

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- 9 -

					
Mom's Blog at Mommy Enterprises, "Fun Things for Families to do in Monterey"	Diary of a Caffeinated Mom (Nicole Banuelos), "Our Family Getaway to Monterey + Our Favorite Places to See"	Party Parents, "Weekend Getaway to Monterey"			
Mommy Enterprises.jpg	Nicole Banuelos.jpg	Party Parents.jpg			
					
Sammy Approves, "10 Things Your Family Will Love about Monterey, CA"	Wanderlust Crew, "Top 10 Things to do in Monterey with Kids"				
Sammy Approves.jpg	wanderlust crew.jpg				
Influencers1. [SHOW ADS IN GRID WITH YES/NO BY EACH] Have you seen this article/blog post before now?					
GRID. Now please think about all of the ads and articles you just saw and indicate how much you agree that...					
ROTATE	Strongly disagree				Strongly agree
After seeing these ads and articles I am more interested in visiting Monterey County	1	2	3	4	5
These ads and articles make me want to get more information on Monterey County	1	2	3	4	5
These ads and articles show that there is a wide variety of sights & activities in Monterey County	1	2	3	4	5
The ads and articles portray Monterey County as a desirable destination	1	2	3	4	5
The ads and articles portray Monterey County as a nearby destination	1	2	3	4	5
The ads and articles make me want to go to the website and learn more about the destination and the packages/deals offered	1	2	3	4	5

Questionnaire




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

<input type="checkbox"/> ROTATE
<input type="checkbox"/> Family
<input type="checkbox"/> Parenting
<input type="checkbox"/> Adventure
<input type="checkbox"/> Hiking
<input type="checkbox"/> Scenic
<input type="checkbox"/> Wellness
<input type="checkbox"/> Spas
<input type="checkbox"/> Wine
<input type="checkbox"/> Golf
<input type="checkbox"/> Beaches
<input type="checkbox"/> Restaurants with a view
<input type="checkbox"/> Aquarium
<input type="checkbox"/> Cannery Row
<input type="checkbox"/> Fisherman's Wharf
<input type="checkbox"/> Big Sur
<input type="checkbox"/> Other, please specify _____


21b. [ASK EVEN IF Q21 IS NO] Do you recall seeing or hearing a "Winter Travel" show with Lee Abbamonte, the youngest American to visit every country in the world, talking about Monterey County?

- Yes
- No

21c. [ASK EVEN IF Q21 IS NO] Do you recall seeing any of the following articles about Monterey County recently? [SHOW TITLE OF ARTICLE + PUBLICATION NAME BESIDE PICTURE – CAROUSEL? – WITH YES/NO FOR EACH] (\\Ads Master\Monterey\2016-2017 Ad Effectiveness\16-17year-end\Items for SMARI 16-17 round 2\PR Earned)

		
Condé Nast Traveler, "Where to Go for Memorial Day Weekend 2017"	Forbes, "Gray Whales Are Migrating Now: See Them Close-Up In Monterey, California"	Hollywood Reporter, "How to do Monterey, California, like HBO's 'Big Little Lies'"
cntraveler_MEMEORIALDAYWEEKEND.jpg	forbes_GRAYWHALESMONTEREY.jpg	hollywoodreporter_BIGLITTLELIESMONTEREY.jpg

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- 11 -

		
Los Angeles Times, "Your copter is waiting. Guests will be air-lifted in as Big Sur's Post Ranch Inn reopens"	The New York Times, "What to Find in Salinas Valley: Lush Fields, Good Wine and, Yes, Steinbeck"	NY Daily News, "Elephants will serve you breakfast at this safari experience in California"
latimes_BIGSURAIRLIFT.jpg	newyorktimes_SALINASVALLEYWINESTEINBECK.jpg	nydailynews_MONTEREYZOOSAFARIBREAKFAST.jpg
		
Paradigm, "Pacific Pathway"	Travel Channel, "8 Great Places for Whale-Spotting"	Vogue, "Inside the Tranquil Seaside Town Where 'Big Little Lies' Was Filmed"
paradigmcg_PACIFICPATHWAY.jpg	travelchannel_8GREATPLACESWHALE.jpg	vogue_TRANQUILBIGLITTLELIES.jpg

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



\\Ads Master\Monterey\2016-2017 Ad Effectiveness\MONT113website.jpg [IMAGE IS NEW]

- 1.....Yes
- 2.....No

ASK IF THEY VISITED MONTEREY AND THEY VISITED THE WEBSITE:

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

- Yes
- No

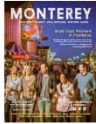
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- 12 -

Questionnaire

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

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

27. Have you seen this Monterey County Visitors Guide before now?



Visitors Guide 1.jpg
 Yes
 No



Visitors Guide 2.jpg

DEMOGRAPHICS

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

D1. Are you...?

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

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

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

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

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

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 - 13 -

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

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

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

- Caucasian/White
- African American/Black
- Latino/Hispanic
- Asian
- American Indian
- Other Specify _____

D7. What is your age? _____

D8. Are you...?

- Male
- Female

D9. Do you identify as LGBTQ?

- Yes
- No
- Prefer not to answer

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 - 14 -