



**MONTEREY**  
GRAB LIFE BY THE MOMENTS<sup>®</sup>

# Brand Barometer

July 2021 Year-end Measure

 **insights**  
Strategic Marketing and Research

# Background

- The Monterey County Convention and Visitors Bureau (MCCVB) is tasked with generating visitation to the county. Strategic Marketing & Research Insights (SMARInsights) has partnered with MCCVB since 2013 to measure the impacts of its marketing and communications. MCCVB continues to define the leading edge in its communications approaches, and SMARInsights is committed to reflecting that in our partnership.
- In the face of widespread uncertainty regarding travel during the COVID-19 pandemic, marketing has been about building mindshare and anticipation, capturing interest, and generating future travel. There was a small share of the population early on who were already comfortable traveling, and that share has grown. Aiming marketing at this group is the most likely to drive near-term travel.
- The current research takes into account the CVB's shortened planning horizon and different geographic and behavioral marketing targets.
- The research is also designed to help establish new marketing goals to enable the CVB to formulate and follow a recovery strategy. The data will be used to identify marketing goals that can be continued through the post-recovery period to enable the CVB to track its performance.

# Objectives

- There are two populations the CVB needs to identify and address in its strategy. The first are those who are ready to travel now. The second are those who are not yet ready but will resume leisure travel in the future, when COVID-19 is no longer a factor. Marketing and measurement goals differ by population, as shown below, and these populations are not static, but will shift as circumstances do.

	Ready to travel now	Will resume travel post-COVID/post-vaccine
<b>Marketing goals:</b>	Drive short-term demand	Maintain, or potentially grow, share of mind and share of preference. The marketing should build equity among future travelers
<b>Research goals:</b>	Identify travelers who are ready to travel – what share of the population they represent, demographic and behavioral identifiers that will aid targeting – and those who are nearly ready to travel	Provide a framework for comprehensive scoring to track the “anticipation factor” among travelers who would visit post-COVID as well as developing brand health measures such as share and competitive familiarity
	Measure reach of the CVB’s content (ads/PR)	Measure reach of the content (ads/PR)
	Calculate an economic impact of the content in terms of influenced visitation and visit spending	Quantify how MCCVB’s content translates into increased future demand

# Methodology

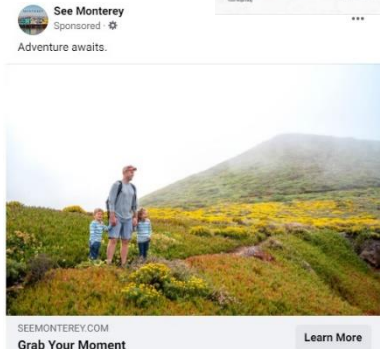
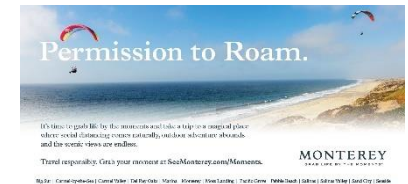
- SMARInsights conducted 1,097 surveys in July 2021.
- To qualify for the survey, respondents had to be travel decision-makers who regularly take overnight leisure trips of at least 50 miles from home.
- SMARInsights developed and programmed an online survey to be consistent with prior measures, with relevant updates. National sample vendors provided a survey link to potential respondents in the desired markets, shown at right. Seattle and Portland were added in January, based on the addition of direct flights to Monterey County.
- This report presents data at a confidence interval of 3.25% at the 95% confidence level.
- Upon completion of data collection, an SPSS dataset was prepared for analysis. Results are compared to the October 2020 baseline and the January 2021 midyear measure.

	Market	Oct 2020	Jan 2021	Jul 2021
<b>Extended drive markets</b>	San Francisco	101	100	100
	Sacramento	100	100	100
	Los Angeles	101	100	100
	San Diego	102	102	98
	Fresno	101	88	95
	Las Vegas	100	100	100
<b>Fly markets</b>	Denver	101	101	102
	Dallas	100	100	102
	Phoenix	101	101	100
	Seattle		101	100
	Portland		101	100

# Advertising Measured

- New creative featuring “Now is the Moment” and “Permission to Roam” creative with video, print, digital, and social. These executions ran from January through June 2021 in the drive and fly (short-haul and national) markets.

Ad spending	Drive	Fly
Pre-Fall 2020	\$241,397	
Fall 2020	\$190,931	
Spring 2021	\$711,920	\$1,101,100





# Key Considerations

Prior to the COVID-19 pandemic, advertising awareness could be fairly well predicted from the dollar amount invested in the media buy, size of the target population, and strength of the advertising at communicating key messages. Now, however, many variables complicate that formula, including:

- **COVID-19** – This is the most obvious and most disruptive element in the landscape, interrupting travel plans, reducing likelihood to travel, changing the way people choose and get to destinations. While the vaccine has curbed the influence of the virus somewhat, there are still impacts playing out in the travel landscape, such as the Delta variant, vaccine hesitancy, the mask debate, etc.
- **Non-travelers may be paying less attention to travel ads** – SMARInsights has seen across several clients that travelers who are not intending a trip in the near future are less aware of travel ads. This makes intuitive sense, since relevance is one element of ads that break through the clutter of media messaging.
- **Higher media costs** – SMARInsights is also seeing higher costs per impression for social and digital placements, with the added challenges of tracking digital impressions due to the iOS update. Advertisers may be having a harder time getting discounts on TV buys without advanced commitments. And while many travel advertisers went dark in early and mid 2020, now that destinations are reopening there is increased demand for media, and increased competition on the airwaves. Several of our clients report paying substantially more for impressions, and we are seeing lower awareness with higher media spending.

# Key Considerations, cont'd.

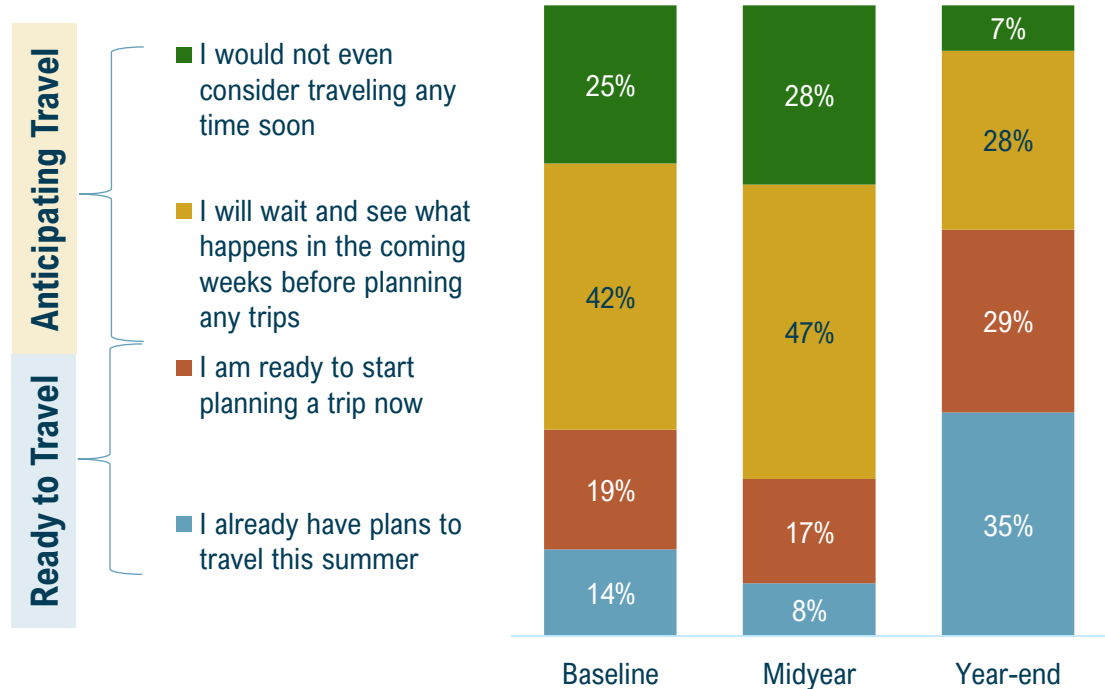
- **Wildfires** – With extreme high temperatures and a raging wildfire season that is covered by all the news outlets and social media, there is more hesitance than we typically see for destinations in the western U.S. This relates to both awareness and impact of the advertising on likelihood to visit and actual visitation.
- **New creative** – even prior to the pandemic, a new campaign typically had lower awareness than a campaign that had run for several seasons and had had time to wear in with consumers. MCCVB ran the “Grab Life by the Moments” campaign for several years in the regional markets, building awareness season over season. So we would expect the new “Now is the Moment” and “Permission to Roam” creative to debut at a lower level of awareness; recall should build over time as the ads continue to run.

It is important to keep these key considerations in mind when reviewing the results of this brand barometer research. While we are eager to get back to a “normal” measure of “normal” campaign performance, the data – and the world – give reasons for a more nuanced analysis of the reach and impact of Monterey County’s advertising.

# Travel Readiness

- As of summer 2021, nearly two-thirds (64%) of leisure travelers have resumed travel/planning.
- Widespread vaccine availability and improved COVID-19 case counts – in addition to pent-up demand for travel – have spurred a return to travel planning and leisure trips.

Which of the following best describes how you feel about traveling?



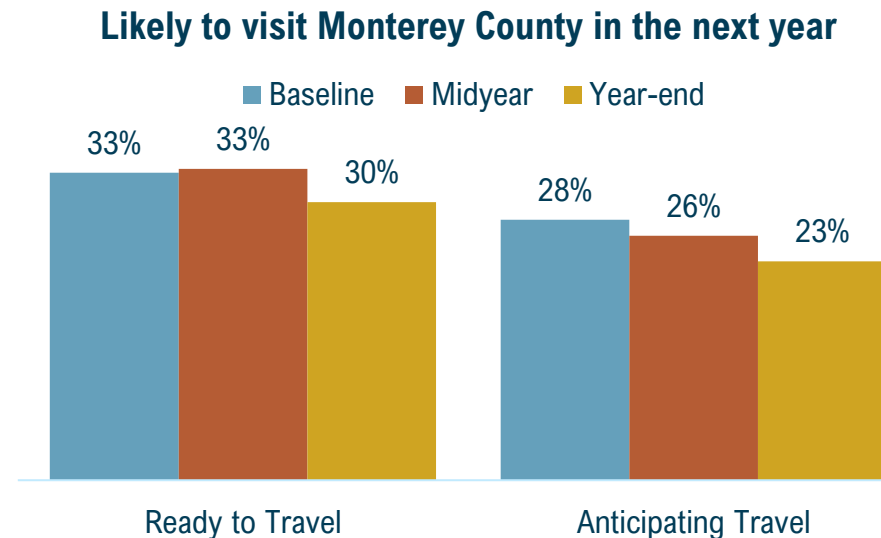
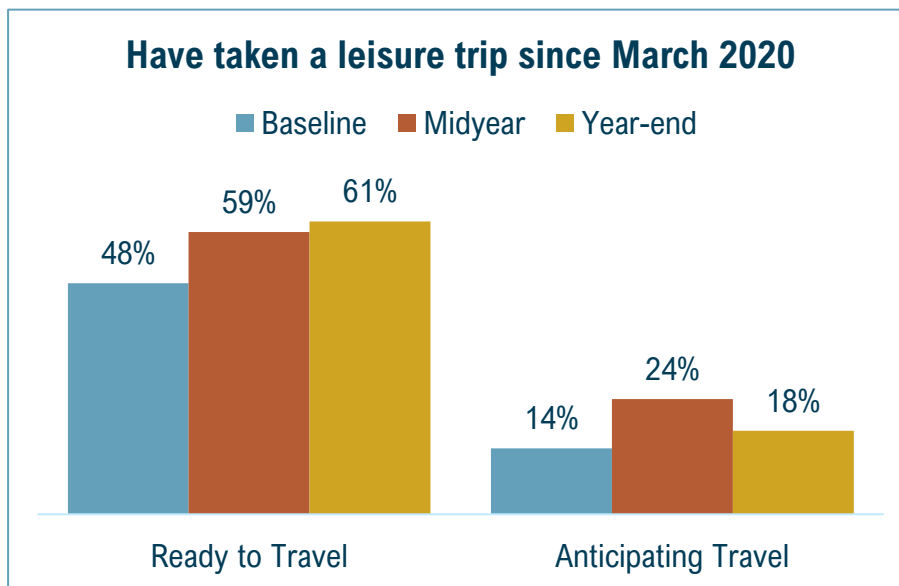
HH in target markets	Baseline	Midyear*	Year-end
Ready to Travel	4,831,954	4,252,997	11,908,268
Anticipating Travel	9,907,767	12,907,529	6,750,209

\* Two markets were added in the midyear measure, so overall HH volume increased.



# Travel Readiness Segments

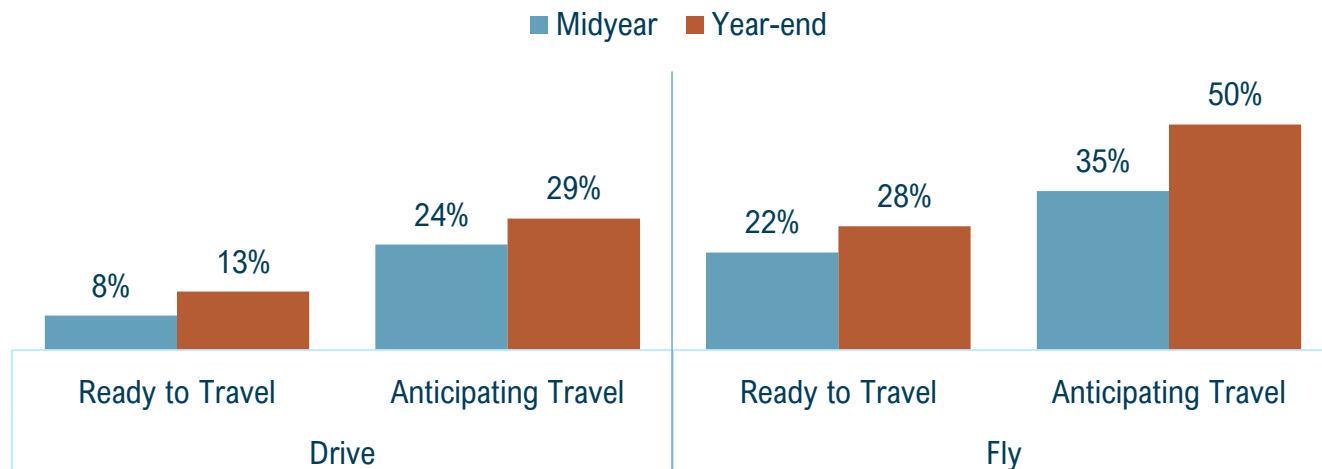
- While those Ready to Travel were already taking trips in January, there are now more consumers in this group. And while there are fewer Anticipating Travel, this group is less likely to have ventured out.
- Among both groups, likelihood to visit Monterey County is down somewhat. This decrease may be due to the wider consideration set early in the year that has now narrowed as consumers make more definite travel plans.



# Impact of fires on visit interest

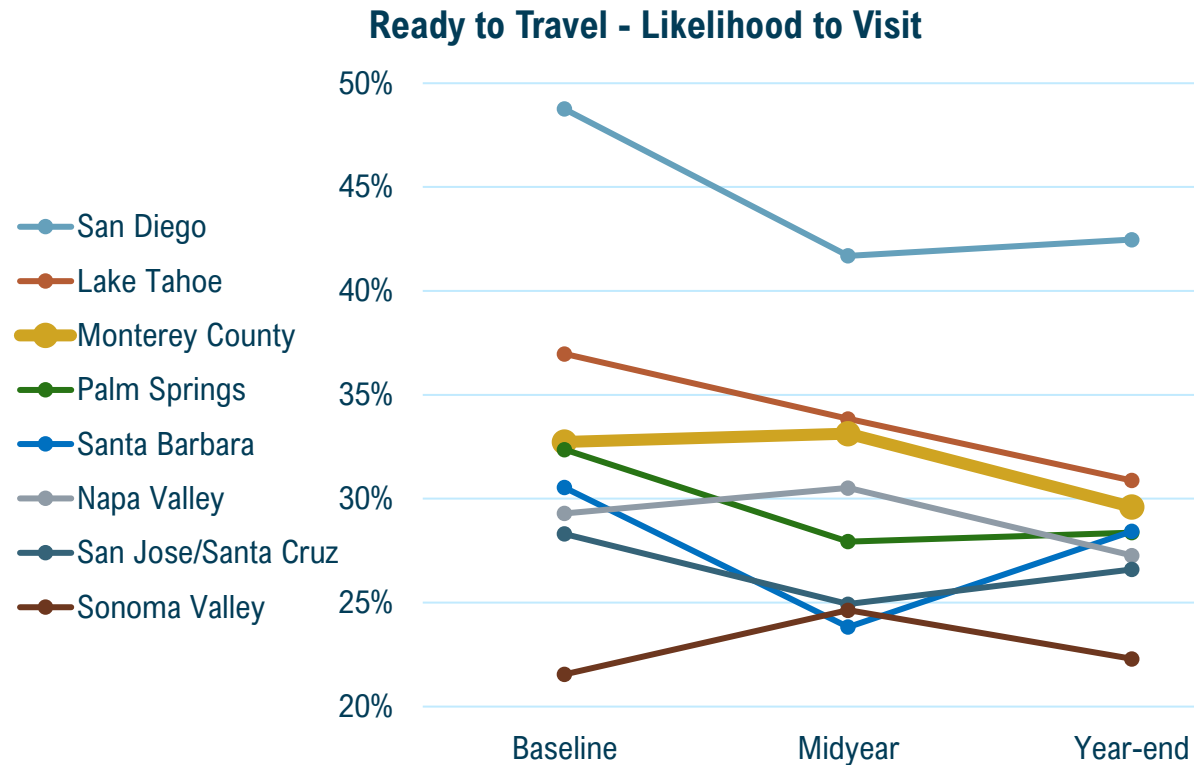
- Beyond the pandemic, other considerations impact interest in visiting Monterey County and other western destinations; namely, wildfires and extreme heat in the region. Of those aware of the fires, more travelers now say that the fires decrease interest in a visit.
- Impacts are particularly strong in the fly markets among those Anticipating Travel.

The wildfires make me want to visit Monterey County less



# Impact on visit interest to the competitive set

- Interest in visiting all destinations in the competitive set is down among those ready to travel. This could be due to extreme heat in the region and wildfires. It could also be due to a narrowing consideration funnel from late fall through to summer as travel plans solidify.
- Relative to the other destinations, Monterey County remains behind San Diego and very close to Lake Tahoe.

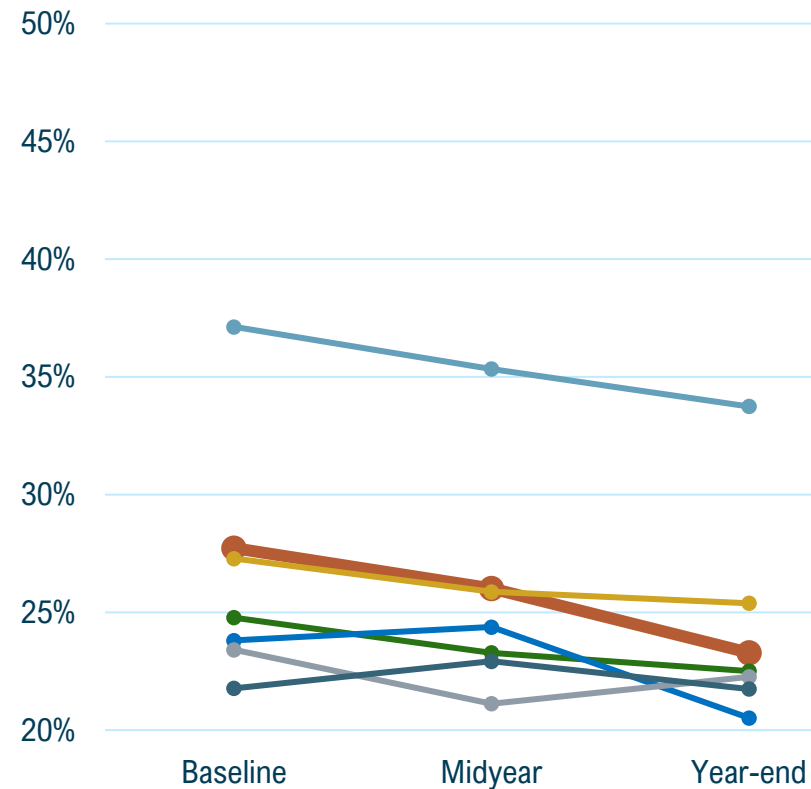


# Impact on visit interest to the competitive set

- Among those Anticipating Travel, there is less interest in any of these destinations compared to the other segment. And interest in these destinations has generally decreased over time.
- Monterey County and Lake Tahoe remain in a second tier behind San Diego.



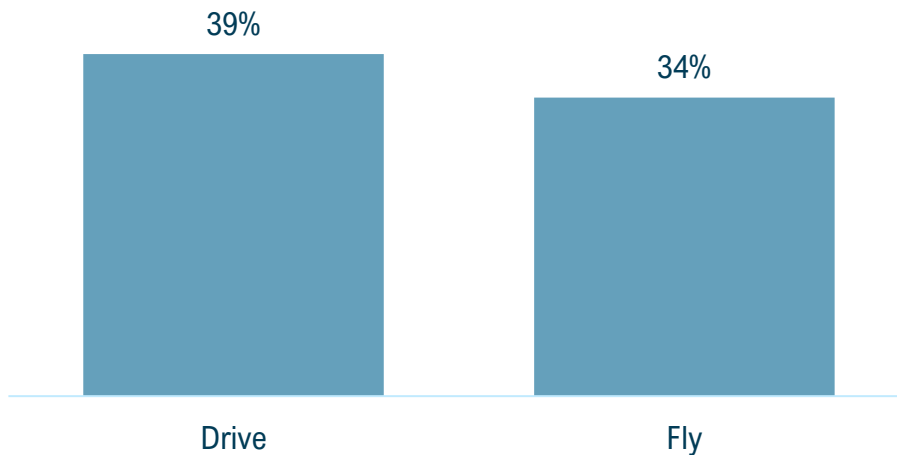
Anticipating Travel - Likelihood to Visit



# Advertising Reach

- The ads reached 39% of travelers in the drive markets – 3.7M households – and 34% of fly markets – 3.1M households.
- The drive markets campaign was the more efficient at just \$0.19 per aware household. This is likely due to awareness building over time since MCCVB has been advertising in these markets since last summer.
- The fly market effort is less efficient than the drive market, but still more efficient than average. SMARInsights' cost-per-aware-household benchmark for CVB campaigns during the COVID-19 era is 41 cents.

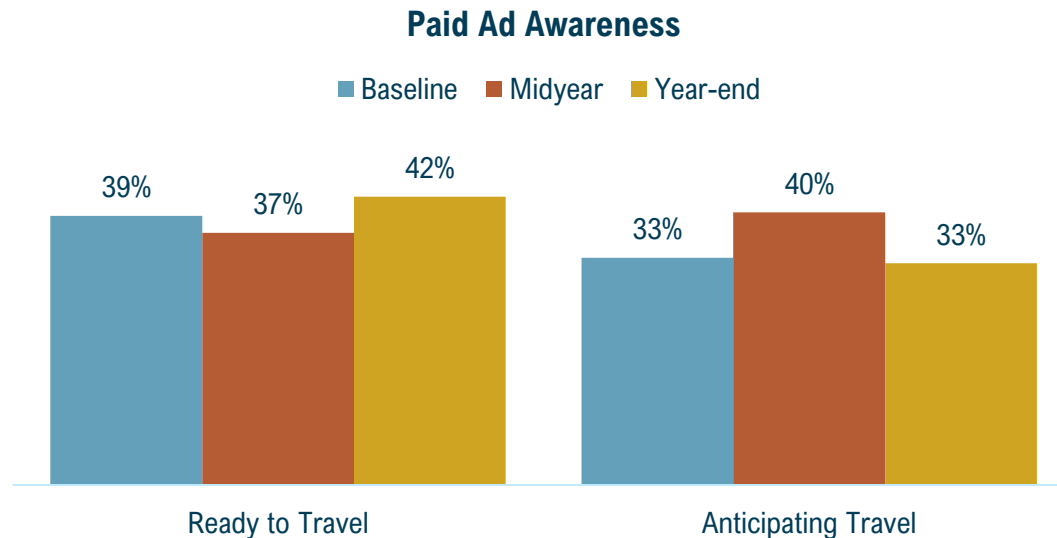
## Ad Awareness



	Drive	Fly
HH	9,501,553	9,156,924
Awareness	39%	34%
Aware HH	3,660,993	3,080,675
Ad spending	\$711,920	\$1,101,100
CPAH	\$0.19	\$0.36

# Ad Reach in Drive Markets

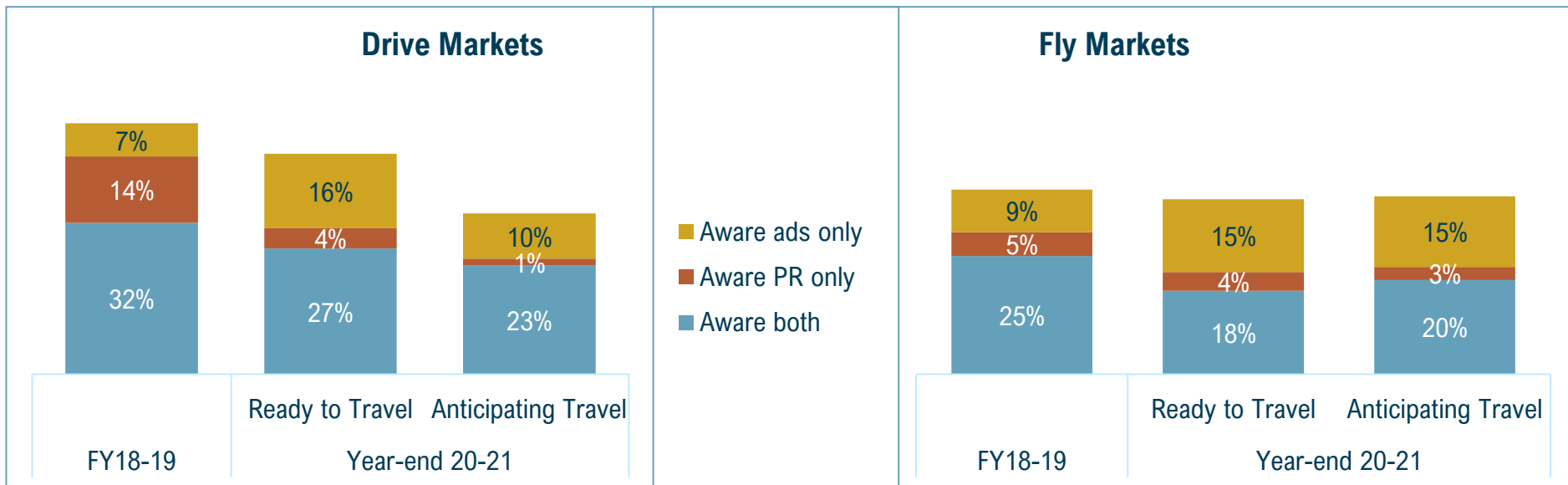
- Ad recall through this year has generally grown among those Ready to Travel. Among Anticipating Travelers, awareness is the same at year-end as it was in the baseline.
- To a large extent, these two segments are moving targets, which makes trending hard. As consumers in the Anticipating Travel segment have migrated to Ready to Travel, awareness has shifted along with them.





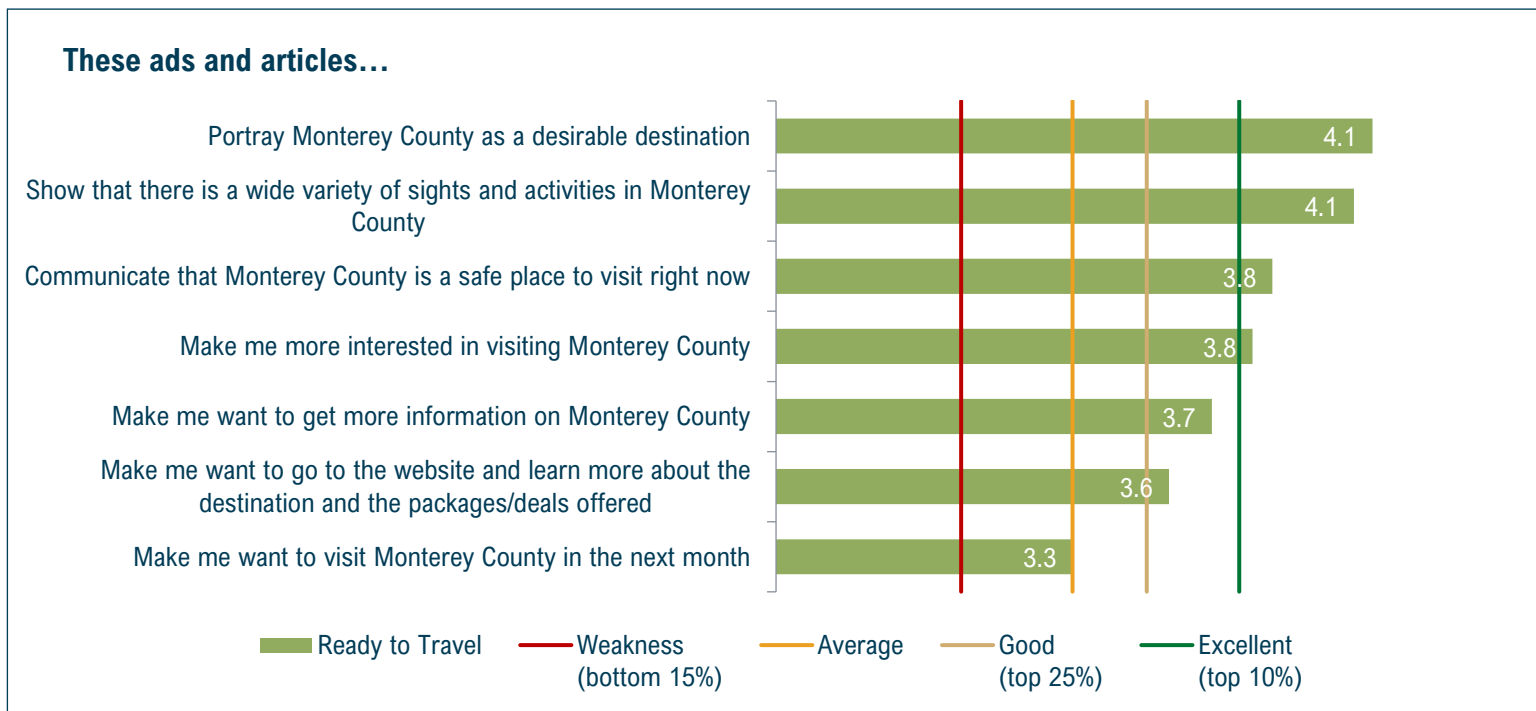
# Marketing Awareness

- As in years past, MCCVB's public relations effort helped extend reach of the marketing. However, as shown below, PR was less effective at extending reach, particularly in the drive markets.
- PR faced unique challenges in this unusual year; consumer capacity for news absorption has largely been consumed by public health and politics.



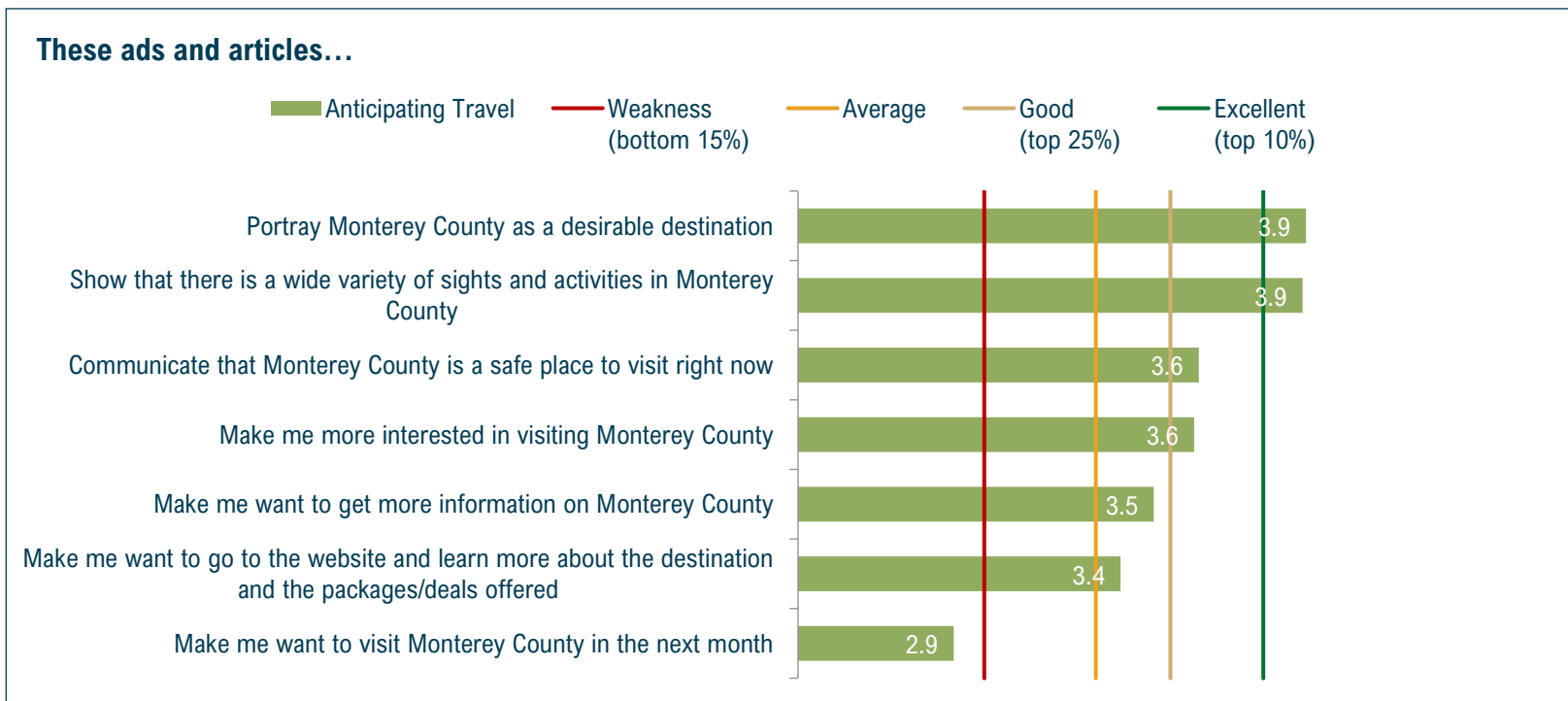
# Creative evaluation

- Among Ready to Travel, the marketing receives excellent ratings for showing Monterey County as a desirable place offering a variety of experiences.
- The average rating for “These ads and articles make me want to visit Monterey County in the next month” is likely impacted by weather and fires. However, all other ratings are much stronger.



# Creative evaluation

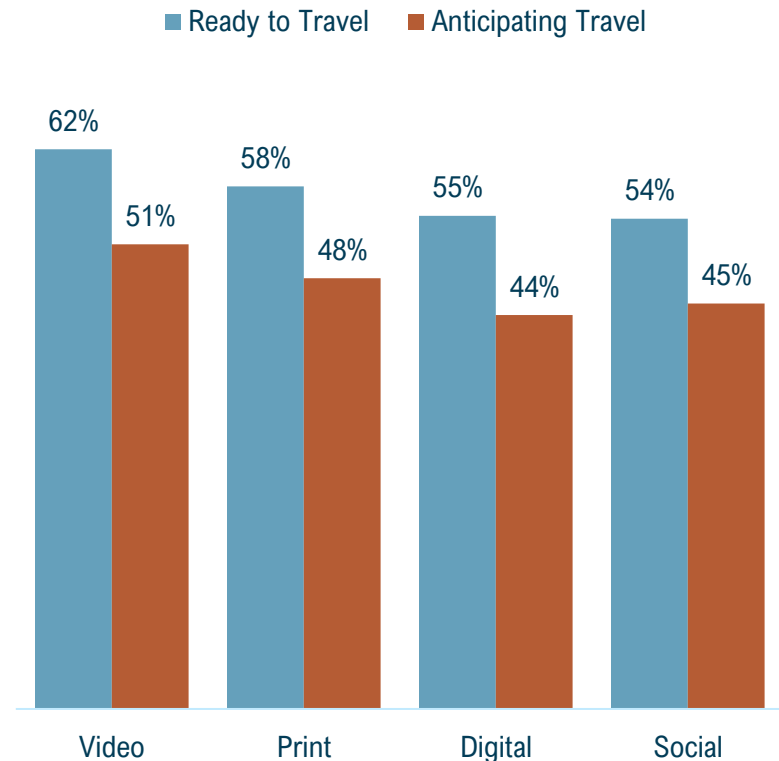
- Ad ratings among Anticipating Travel are directionally the same as Ready to Travel, but lower. This makes sense, given that the bar for generating interest in a visit now or for communicating a safe destination is much higher for these consumers.



# Creative evaluation

- Similarly, the ads are more motivating to those Ready to Travel than to those Anticipating Travel.
- The Video ad is the most motivating among both groups – video typically rates highest among media since it can show more product. The remaining media refer to and help amplify the more complete story told in the video spot.

These ads make me want to visit Monterey County (top 2 Box)



# Video Evaluation – Barriers

Consumers were given the opportunity to express dislikes about the brand video. Fewer than 10% did so. Here are examples of comments:

- “The video was fine and if I were thinking about a trip to Monterey County, this video would certainly push me towards making plans. However, since I’ve got several other trips already planned, Monterey County is a ways down my list of potential vacation spots.”
- “I like the moments turning into vacation transitions. But it feels too early for a vacation and no one was wearing masks.”
- “I liked the scenery. I disliked the camping.”
- “Doesn’t show things I’m interested in.”
- “It’s a good video. I don’t think it showed any footage of the aquarium though. I think that’s odd considering it’s a main attraction. Maybe I missed it?”

# Ad Impact on Image

- The ads positively impact consumer views of Monterey County across geographies and travel readiness segments.

- As shown in the table, drive markets have more positive perceptions than fly, and Ready to Travel has more positive perceptions than Anticipating Travel. The ads positively impact them all.

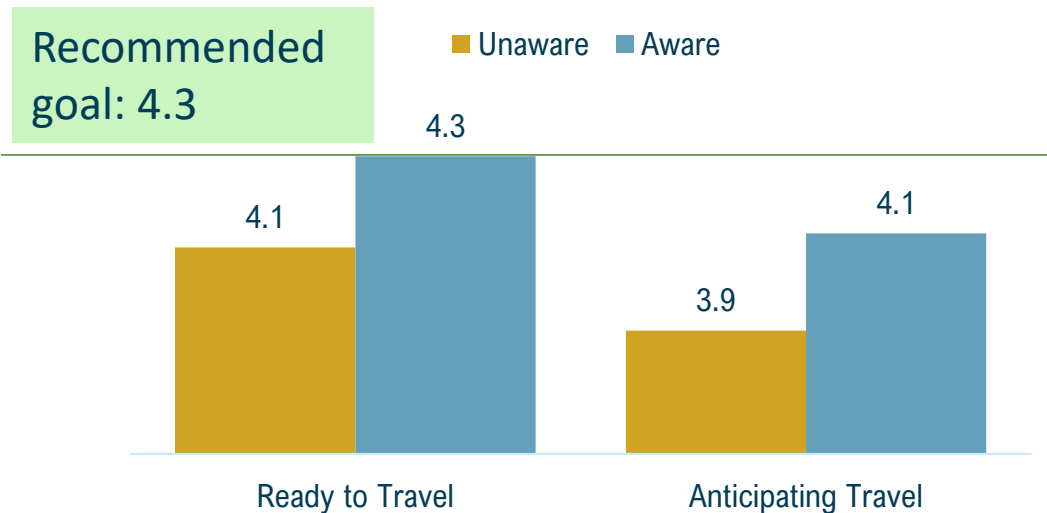
	Drive				Fly			
	Ready to Travel		Anticipating Travel		Ready to Travel		Anticipating Travel	
	Unaware	Aware	Unaware	Aware	Unaware	Aware	Unaware	Aware
Has amazing scenery	4.3	4.3	4.1	4.2	3.7	4.0	3.7	3.9
Is a good weekend getaway destination	4.0	4.3	3.8	4.0	3.4	3.9	3.6	3.7
Is a safe place to visit	4.1	4.3	3.9	4.1	3.5	4.0	3.6	3.7
Is a charming place	4.2	4.3	4.0	4.2	3.5	3.9	3.6	3.8
Is a welcoming and friendly place	4.0	4.2	3.8	4.1	3.5	3.9	3.5	3.7
Is a place with lots to see and do	4.0	4.2	3.9	3.9	3.5	3.9	3.5	3.7
Is fun	4.0	4.2	3.9	4.1	3.6	4.0	3.6	3.8
Is a sustainable destination	3.8	4.1	3.6	4.0	3.3	3.8	3.4	3.5
Is a unique vacation experience you can't get at other places	3.8	4.1	3.8	3.9	3.4	3.8	3.4	3.5
Is an upscale destination	3.9	4.1	3.9	3.9	3.6	3.9	3.5	3.6



# Brand Health Barometer

- In the drive markets, where ads have run through most of the year and where familiarity is high, ad-aware Ready to Travel consumers generate ratings sufficient to meet the brand measure goal.

## And Impact on Brand Measure - Drive Markets



BRAND MEASURE GOAL: Monterey County is a ...

Charming place

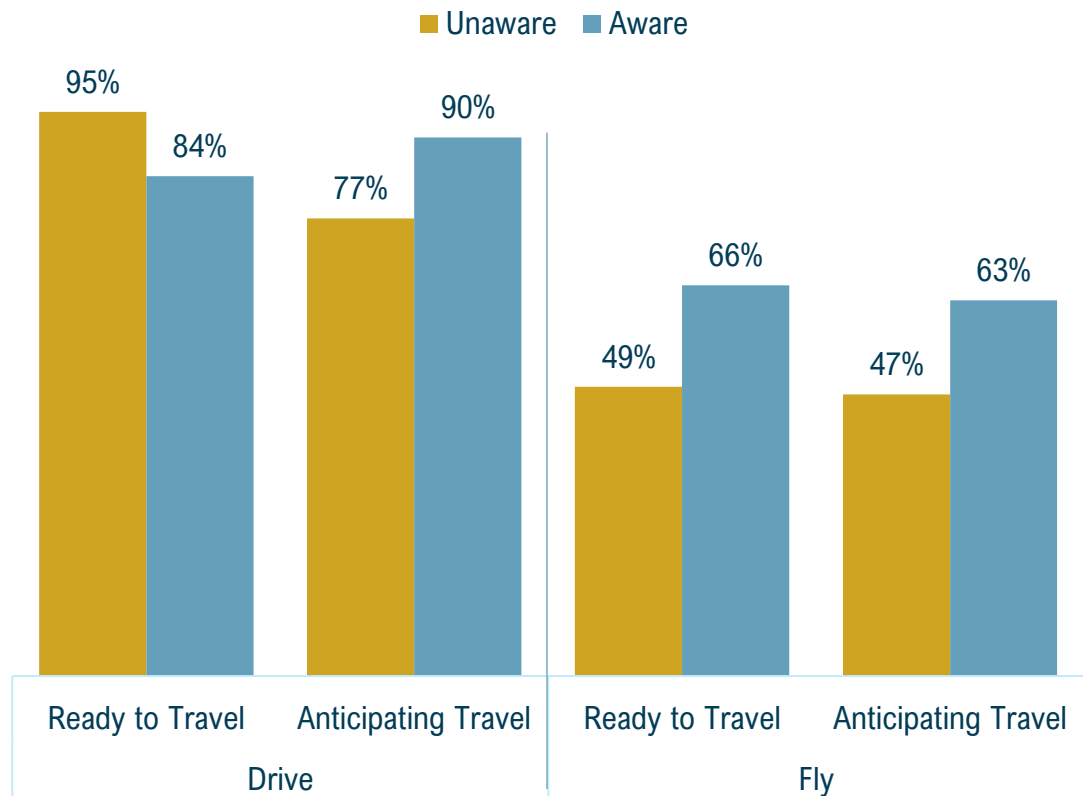
Good weekend getaway destination

Welcoming and friendly place

# Ad Impact on Brand Awareness

- The ads impact familiarity among fly market travelers – important because these more distant geographies need to be introduced to the destination before they can consider visiting – and among those Anticipating Travel.
- Those Ready to Travel in the closer-in markets are already so familiar that the ads do not generate additional familiarity.

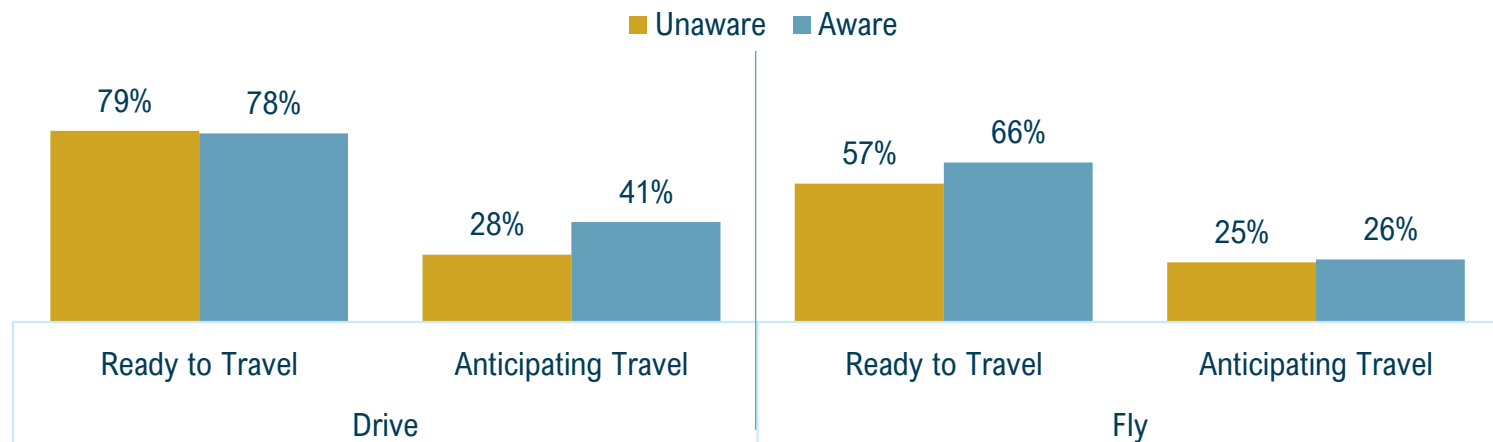
Ad impact on somewhat/very familiar with Monterey County leisure product



# Ad Impact on Perceptions of Pandemic Safety

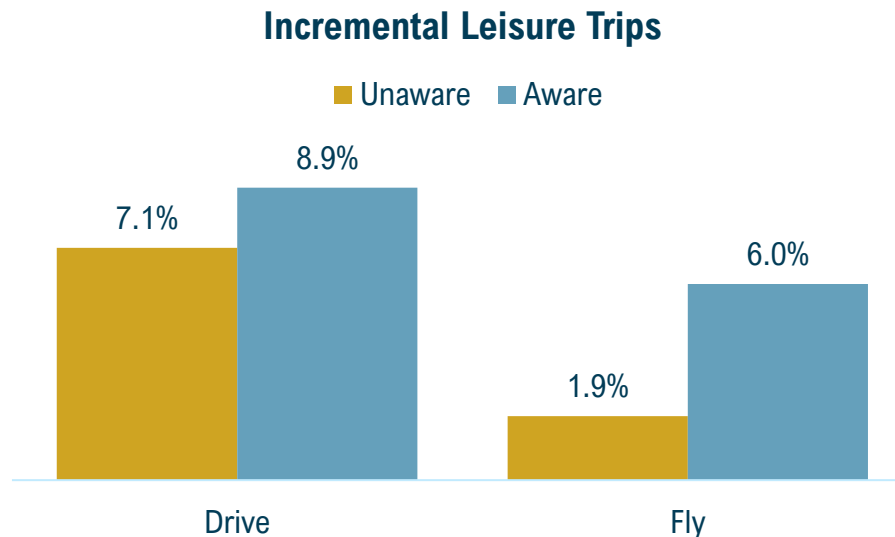
- Again, Ready to Travel in the drive markets already have positive views of the county's safety relative to COVID-19, so the ads did not generate additional lift.
- However, fly market Ready to Travel and drive market Anticipating Travel are both positively impacted by the ads on this measure.

Ad impact on How safe does Monterey County feel to you given the coronavirus? (Very + Somewhat Safe)



# Incremental Trips among Ready to Travel

- Among those Ready to Travel in the drive markets, the ads are associated with a 1.8-point lift in qualified visits (trips using paid lodging, and the purpose of which is not to visit friends and relatives).
- In the fly markets, where the level of visitation among unaware consumers is much lower, there is a 4-point lift in qualified visits to Monterey County.



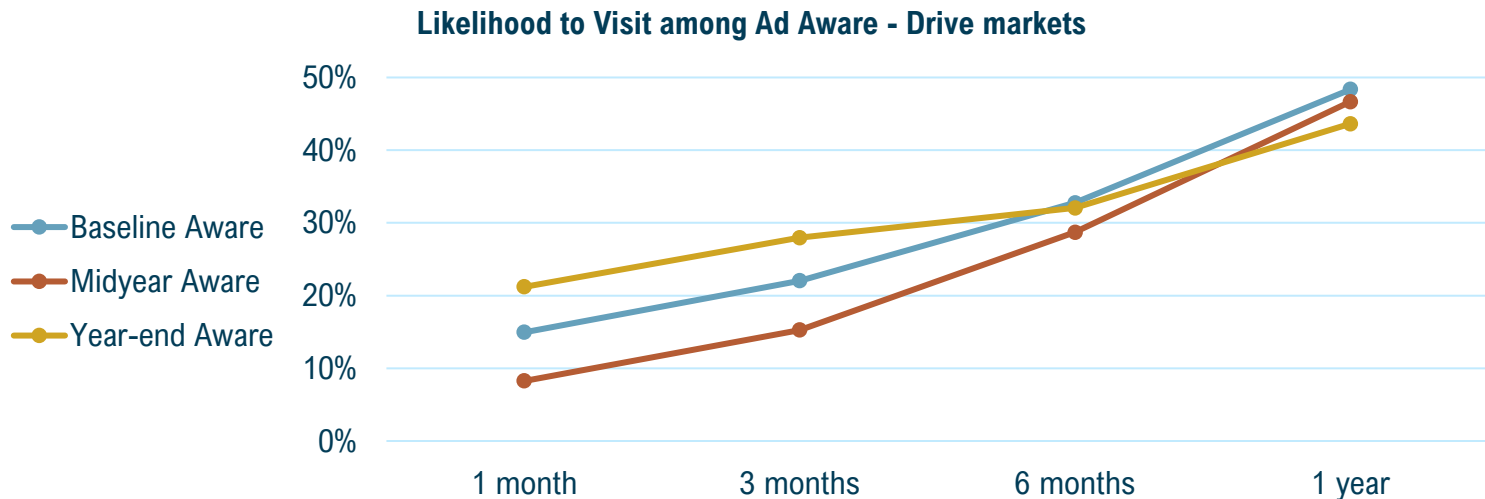
# ROI among Ready to Travel

- The campaign influenced nearly 46,000 visits among Ready to Travel households in the drive markets, and more than 80,000 trips in the Fly markets.
- Trip spending is rebounding. We saw an average of \$800 spent on drive market trips at the midyear mark, and that is up to more than \$950. Fly market visitors spent nearly \$1,400 per visit.
- MCCVB's investment in the drive markets generated \$44M in influenced visitor spending, for an ROI of \$62.
- In the fly markets, the ads generated \$110M in visitor spending, for an ROI of \$100.

Ready to travel	Drive	Fly
HH	9.5M	9.2M
Ready to Travel	63%	66%
Ready HH	5.9M	6.1M
Awareness	42%	33%
Aware HH	2.5M	2.0M
Incremental travel	1.8%	4.0%
Influenced trips	45,857	80,708
Trip spending	\$959	\$1,364
Influenced visitor spending	\$43,966,974	\$110,063,146
Ad spending	\$711,920	\$1,101,100
<b>ROI</b>	<b>\$62</b>	<b>\$100</b>

# Anticipating Travel

- Those anticipating travel are more cautious than those ready to travel. So even though there is some travel happening among this group, it makes more sense to focus on the ads' impact on this group's visit *interest*.
- Visit intent among this segment continues to show an increase by time period (higher for 1 year than for 1 month) and has generally grown with each measurement. The challenge is that from one measure to the next, some consumers have shifted from Anticipating to Ready to Travel. This helps explain why the 6-month and 1-year likelihood to visit are very similar across measures.

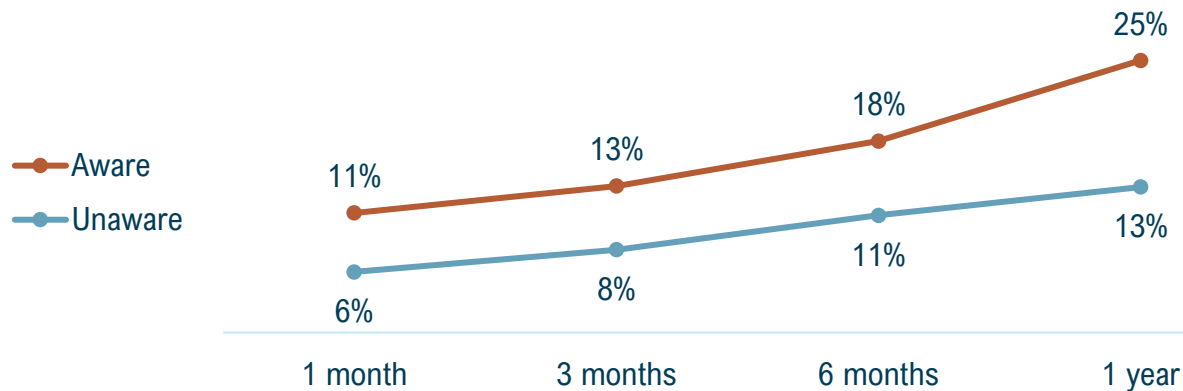




# Anticipating Travel – Fly Markets

- With advertising invested in these markets this spring, likelihood to visit has increased among this group of consumers, particularly in the longer term. This makes sense because this group is defined in part on its “wait and see” attitude toward travel and pandemic safety.

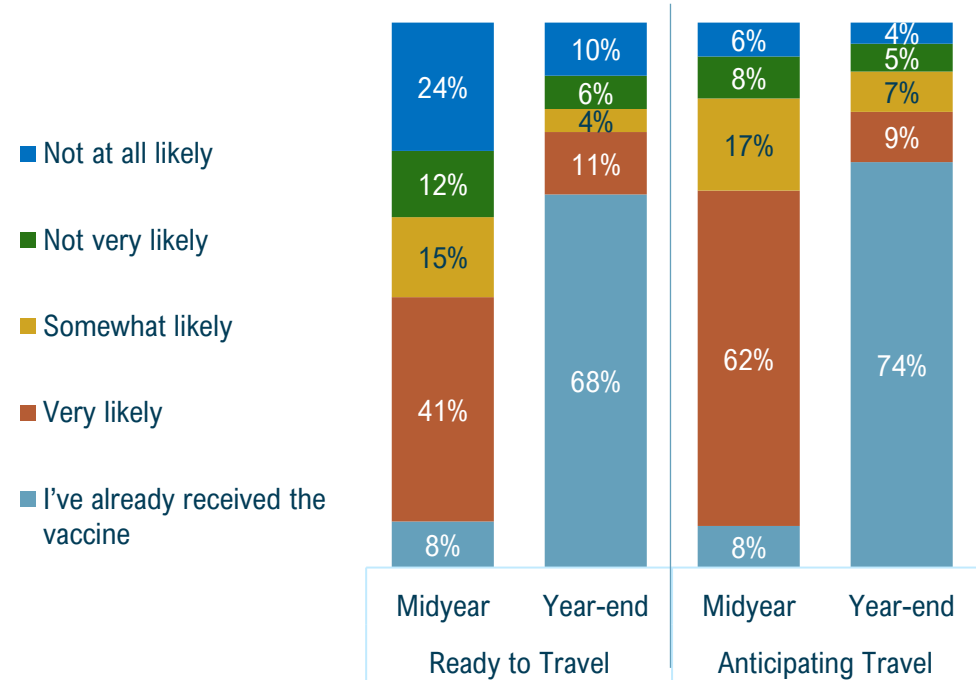
Likelihood to Visit by Ad Awareness - Fly markets, Anticipating Travel



# Views toward the Vaccine

- The majority of travelers – regardless of travel readiness – have already received the vaccine.
- Just 10% of those Ready to Travel and 6% of those Anticipating Travel say they are not at all likely to receive it.

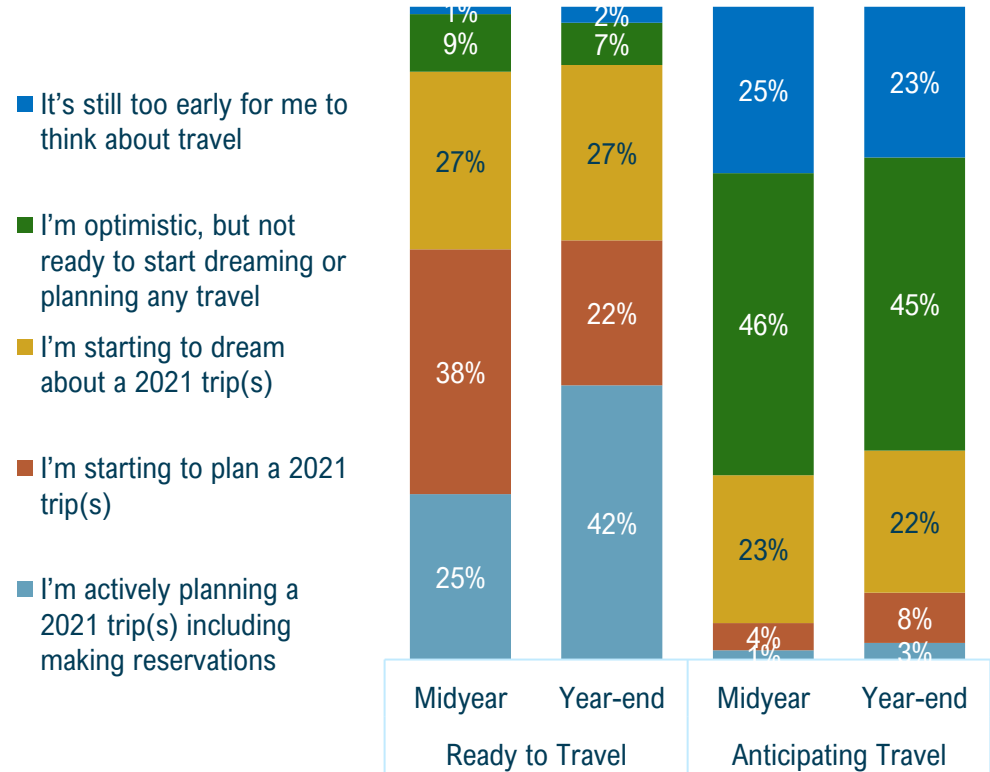
When a COVID-19 vaccine becomes available to you, how likely are you to take it?



# Travel Views

- In both travel readiness segments, views toward travel are more optimistic.
- Among Ready to Travel, more consumers are actively planning trips.
- The Anticipating Travel segment has not grown in travel planning (those who did so likely shifted over to ready to Travel), but there is slightly less refusal to think about travel.

Which best describes your feelings about travel in 2021?





# Insights

A number of variables – public health, weather, media costs – make a comparison to prior campaign performance difficult. Because of this, comparing results within the measure makes more sense than to prior studies.

Among those Ready to Travel, the campaign positively impacts views of Monterey County, familiarity, and likelihood to visit.

Among those Anticipating Travel, the campaign positively impacts views of the county's safety relative to the pandemic, image, and boosts likelihood to visit.

# Insights, cont'd.

- Ad recall through the year generally grew among those Ready to Travel. Among Anticipating Travelers, awareness is the same at year-end as it was in the baseline. To a large extent, these two segments are moving targets. As consumers in the Anticipating Travel segment have migrated to Ready to Travel, awareness has shifted along with them.
- Additionally, while MCCVB's PR efforts are generally very effective at extending reach of the marketing, that was not the case this year. Nevertheless, this campaign is more efficient than average, compared to SMARInsights' benchmark for CVB campaigns during the COVID-19 era.
- The marketing received excellent ratings for showing Monterey County as a desirable place offering a variety of experiences – across both travel readiness segments.
- The ads generated more than 125,000 visits to Monterey County. Compared to the midyear measure, visit spending among drive market visitors is up. Overall, in both market groups, the campaign generated \$154M in consumer spending. With total campaign spending of \$1.8M, this equates to an overall return on investment of \$85 – \$62 for the drive market campaign and \$100 for the fly market campaign.
- Views toward travel have improved as most consumers have received the COVID-19 vaccine. The newest challenges facing the destination are the extreme heat and wildfires, which also impact interest in visiting the other destinations in the competitive set.