

MCCVB

Marketing Intelligence Report

August 27, 2015



MARKETING INTELLIGENCE REPORT

This report summarizes a number of key research programs initiated and managed by MCCVB. These include:

- Communication Effectiveness Study
- Audience Segmentation Study
- Visitor Profile Study
- Media Planning Parameters



Methodology

- Advertising/communication impact is assessed by measuring the differences in perceptions and behaviors between those who have been exposed to the various marketing channels and those who have not.
- The survey is administered online so that respondents can see and hear the marketing materials, resulting in a representative awareness assessment.
- A total of 1,436 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.” Again, the research focuses on the advertising impact in these markets.

Market	Completed Surveys
San Francisco	258
Sacramento	262
Los Angeles	130
San Diego	128
Remaining CA	132
Fly markets – Phoenix/Vegas	127
Remaining National	399
Total	1,436

Regional Markets

Insights

- The paid advertising reached nearly a third (31%) of the regional target audience in FY14/15.
- In FY14/15, more than 120,000 overnight Monterey trips and \$127 million in visitor spending are attributable to the advertising.
- While the campaign did not maintain the prior level for the scorecard measure relating to generating interest in Monterey travel, the metric is still above the 3.8 goal. Further, the results suggest that this outcome, like incremental travel, is closely tied to ad spending. Therefore the outcomes may be guided by media investment.
- Spending has tremendous impact on awareness, with consistent investment generating increasing returns, since awareness tends to build over time. Decreasing investment prevents that increasing visibility, and limits the ad messages' potential to impact perceptions and travel behaviors. In this case, spending followed a bell curve, increasing to a peak in Q4 of FY13/14 and tapering off throughout FY14/15.
- While awareness continued to grow, other impacts followed spending and tapered off. It takes time for ads to impact perceptions and behaviors, so a consistent presence is important.

Media & Campaign Spending

- The campaign’s paid advertising included print, digital, Facebook, Twitter, and Pandora Radio.
- As shown in the tables below, the focus was on the regional investment, which peaked in late spring of 2014 and has since tapered off.
- In addition to brand ads, the spring 2015 campaign included some event-focused and sweepstakes ads with a more retail-style call to action.

Calendar Year Media Spend	Regional	National	Total
2013	\$372,005	\$61,819	\$433,824
2014	\$1,070,786	\$312,706	\$1,383,492
2015	\$245,028	\$97,050	\$342,078

Fiscal Year Media Spend	FY 2013/14			FY 2014/15		
	National	Regional	Total	National	Regional	Total
Q1 (July-Sep.)	\$0	\$45,758	\$45,758	\$50,624	\$177,005	\$227,629
Q2 (Oct.-Dec.)	\$61,819	\$326,247	\$388,066	\$71,347	\$124,339	\$195,686
Q3 (Jan.-March)	\$52,888	\$295,521	\$348,409	\$71,965	\$163,368	\$235,333
Q4 (April-June)	\$137,847	\$473,921	\$611,768	\$25,085	\$81,660	\$106,745
Total	\$252,554	\$1,141,447	\$1,394,001	\$219,021	\$546,372	\$765,393

Advertising-influenced Trips

- More than 120,000 overnight Monterey trips from the regional markets are attributable to MCCVB advertising.
- These visitors spent \$1,059 on average while in Monterey, up from \$1,038 at mid-year.

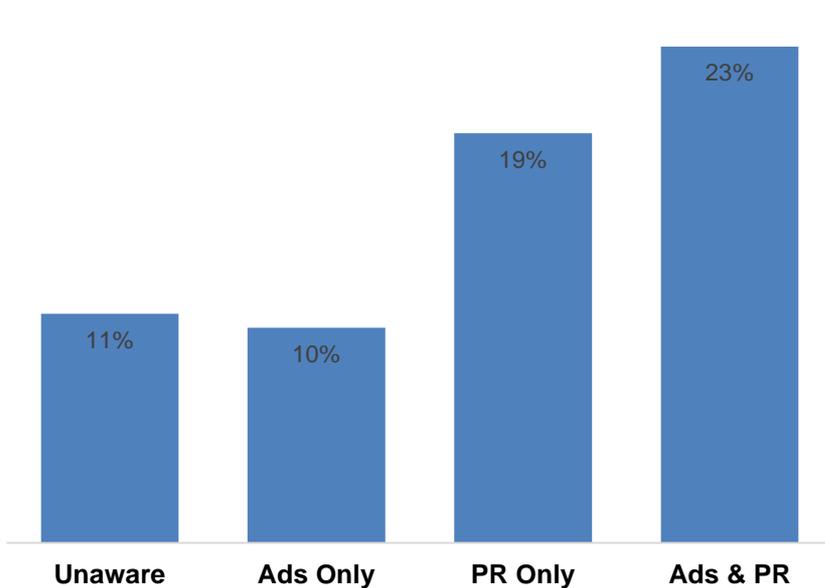
Total Regional, FY14/15	
Traveling HHs	14,382,392
Awareness	31%
Aware HHs	4,520,180
Incremental Travel %	3.3%
Incremental Traveling HHs	147,512
Overnight %	81.5%
Incremental Overnights	120,195

Average FY14/15 Monterey Trip Spending	
Lodging/accommodations	\$ 439
Meals/food/groceries	\$ 230
Attractions	\$ 93
Shopping	\$ 89
Entertainment	\$ 28
Transportation	\$ 128
Other	\$ 51
Total	\$ 1,059

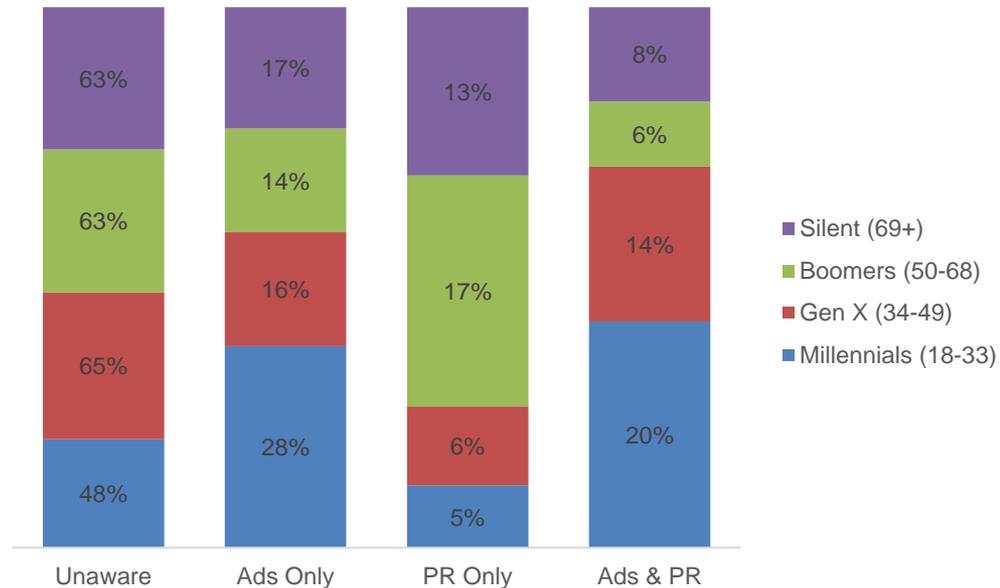
COMBINED PR & ADVERTISING EFFECTS

- PR is helping to influence travel, and there is additional lift when combined with the paid advertising.
- This result should not be interpreted as the ads having no impact, but rather that the synergy between ads and PR is particularly effective.
- The result is also, to some degree, due to the fact that those aware of the PR skew older.

Visited Monterey



Ad & PR Awareness by Age



Brand Awareness

- While awareness is more directly tied to spending, the travel increment trails somewhat, reflecting the time it takes for ads to impact perceptions and behaviors.
- While the cost per aware household, a measure of relative efficiency, has decreased, even the early 2014 figure of \$0.22/aware household is better than the SMARInsights benchmark of \$0.50/aware household for a spot market campaign. Continued spending at that period's level would likely gain additional travel increment.

Regional Review – Year-over-year comparison	Jan.-June 2014	Jan.-June 2015
Regional Media Spend	\$769,442	\$245,028
Awareness	25%	31%
Aware HHs	3,451,951	4,392,303
Cost per Aware HH	\$0.22	\$0.06
Incremental Overnight Travel %	2.1%	0.6%
Incremental Overnight Traveling HHs	73,000	25,290

Brand Awareness-influenced Room Nights

- Building on the more than 230,000 room nights generated during the first half of FY14/15, the year-end figure topped out at more than 320,000 room nights.
- Despite lower incidence of hotel/resort stays than in FY13/14, higher awareness and longer stays led to growth in the overall impact.
- This is a 68% increase over the FY13/14 results.

Total Regional	FY 13/14	FY 14/15
Incremental overnight traveling HHs	101,392	120,195
% staying in hotel, motel, inn, lodge, B&B or resort	85%	79%
Incremental trips staying in hotel, motel, inn, lodge, B&B or resort	86,081	95,262
Avg. # nights on trip	2.2	3.4
Ad-influenced room nights	192,077	323,375

AUDIENCE SEGMENTATION STUDY



Objectives & Method

The Monterey County Convention & Visitors Bureau (MCCVB) wishes to identify high value visitor segments that will be used to guide messaging and targeting strategies. The segments need to be easily identifiable so that they can be used in future research.

1

- The MCCVB has partnered with Strategic Marketing & Research Insights (SMARInsights) to identify and describe the predominant visitor segments.

2

- SMARInsights applied the geo-demographic PRIZM® NE segmentation system to the MCCVB visitor database and to our national travel trend database to identify the PRIZM segments that have strong Monterey travel skews.

3

- We then grouped these highly represented PRIZM segments into clusters based on a mixture of travel preferences, attitudes, and demographics obtained from past Monterey research and other national studies that SMARInsights has conducted.

The result is five high value Monterey visitor segments that can be identified by applying PRIZM. In other words, segment assignment requires only physical address or ZIP + 4.

PRIZM Skews

- 13 of the 66 PRIZM segments account for about one-third of Monterey's leads database.
- These same 13 PRIZM segments account for about half of actual Monterey visitors.
- They account for 23% of the total leisure traveling population.

PRIZM #	PRIZM Name	Monterey Database %	Database Index Against Leisure Traveling Population	*Monterey Visitor %	Visitor Index Against Leisure Traveling Population
07	Money and Brains	6.6%	239	12.9%	467
26	The Cosmopolitans	2.4%	176	4.0%	294
13	Upward Bound	3.7%	174	3.6%	166
34	White Picket Fences	2.0%	161	3.6%	284
40	Close-In Couples	1.6%	120	3.6%	274
04	Young Digerati	2.3%	117	3.3%	170
24	Up-and-Comers	1.3%	81	3.3%	207
29	American Dreams	4.1%	181	3.1%	138
16	Bohemian Mix	1.8%	84	2.9%	133
02	Blue Blood Estates	2.2%	162	2.7%	194
14	New Empty Nests	1.6%	121	2.7%	200
03	Movers and Shakers	2.9%	128	2.5%	108
10	Second City Elite	2.7%	179	2.5%	164

*This data comes from SMARInsights' national travel trend database.

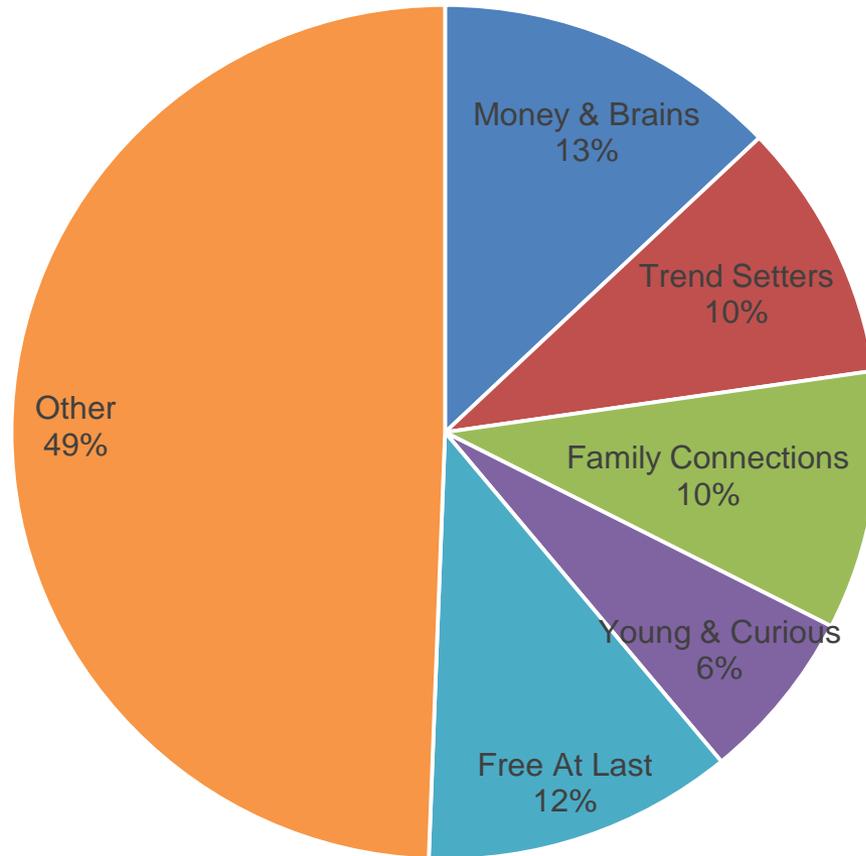
Monterey Visitor Segments

- From the 13 key PRIZM segments, a group of five core, high-value Monterey visitor segments was created and is used to guide messaging and media strategies.
- The remainder of this section summarizes these segments.

Segment	Money and Brains	Trend Setters	Family Connections	The Young and the Curious	Free At Last
% of Monterey Visitors	12.9%	9.8%	9.8%	6.5%	11.6%
Activity Skews	Food and wine, resorts, night life, shopping	Night life, wineries, resorts	Golf, shopping, family attractions, hiking	Learning about marine wildlife, culture, history, national parks, aquariums	Outdoor adventure, scenery, art, golf
Demographic Skews	Urban, wealthy, middle age, family mix	Young to middle age, upscale, family mix	Varied age, varied income, either have kids or empty nesters	Upper middle class, young without kids or middle age with kids	Upper or middle class, older, no kids at home



PRIZM Segments Among Monterey Visitors



MONTEREY VISITOR SEGMENTS SUMMARIES

- Money and Brains
- Trend Setters
- Family Connections
- The Young and the Curious
- Free At Last



Money and Brains



12.9% of Monterey Visitors

Demographics



Wealthy



45-64 years old

Family mix



Graduate degree or more

Money and Brains have high incomes, advanced degrees, and expensive tastes to match their credentials. They stay in nice hotels and eat at fancy restaurants. They take long leisure trips to relax, but travel is not all about being pampered. Their intellectual curiosity leads them to cultural/historical attractions.

*Travel Activities (Index against Population)

- Food and wine (126)
- Cultural/historical attractions (108)
- Night life (124)
- Resorts (116)
- Shopping (113)

Travel Spending

- High – Average of \$3,150 per trip
- Take fewer, longer trips

Lodging

- Hotel
- Rental home, condo, timeshare

Information Sources

- Destination website
- Airline/hotel website
- Travel book
- Magazine/newspaper

Print Media

- New York Times
- Food & Wine
- Travel & Leisure

*Mix of MRI Vacation
Travel Attitude
Statements and
Monterey CVB 2013
Brand Research

Trend Setters



9.8% of Monterey Visitors

Demographics



Upscale



Young to middle-aged
Family mix



College grad or advanced degree

The Trend Setters are younger to middle-aged, educated and ambitious. They like to visit new places. While they skew upscale, they still look for deals and are not opposed to waiting until the last minute to save money on travel.

*Travel Activities (Index against Population)

- Food (108)
- Night life (174)
- Wineries and wine experiences (148)

Travel Spending

- High – Average of \$2,791 per trip
- Take long and short trips

Lodging

- Hotel
- Campground
- Friends

Information Sources

- Blogs
- Social media
- Search engine

Print Media

- New York Times
- Condé Nast
- The New Yorker
- Budget Travel

*Mix of MRI Vacation
Travel Attitude
Statements and
Monterey CVB 2013
Brand Research

Family Connections



9.8% of Monterey Visitors

Demographics



Middle income to wealthy



Young to old kids at home or empty nesters



Some college to graduate degree

This group varies demographically, but they tend to use leisure travel as a way to connect with family or friends. They are value-conscious and like to visit their favorite destinations over and over again.

*Travel Activities (Index against Population)

- Attractions for kids and the family (139)
- Shopping (166)
- Beach/ocean (103)
- Camping (124)
- Hiking (134)
- Golf (167)

Travel Spending

- Low – Average of \$2,005 per trip

Lodging

- Hotel
- B&B
- Resort
- Rental home, condo, timeshare

Information Sources

- Family/friends
- Destination website
- Airline/hotel website

Print Media

- Better Homes & Gardens
- Good Housekeeping
- Southern Living
- Parents

*Mix of MRI Vacation
Travel Attitude
Statements and
Monterey CVB 2013
Brand Research

The Young and the Curious



6.5% of Monterey Visitors

Demographics



Upper middle class



25-55 years old



College graduates

Younger are not likely to have kids; older are likely to have kids

These young to middle-age travelers enjoy learning about the history, culture, and wildlife of a destination. They are likely to visit national parks, aquariums, or museums.

*Travel Activities (Index against Population)

- Cultural/historical attractions (139)
- National parks and other outdoor options (129)
- Learn about marine environment and wildlife (172)
- Scenery (110)

Travel Spending

- Low – Average of \$2,347 per trip

Lodging

- Hotel
- B&B
- Rental home, condo, timeshare

Information Sources

- Search engine
- Reservation site (e.g., Open Table)

Print Media

- Sports Illustrated
- National Geographic Traveler

*Mix of MRI Vacation Travel Attitude Statements and Monterey CVB 2013 Brand Research

Free At Last



Demographics

- 💰 Middle to upper class
- 🏠 Older, no kids at home

These now child-free travelers are spreading their wings and flying from the empty nest. They are physically active travelers who are looking for challenge and adventure. They like meeting new people while traveling.

11.6% of Monterey Visitors

*Travel Activities (Index against Population)

- Outdoor adventure (133)
- Scenery (113)
- Golf (106)

Travel Spending

- High – Average of \$2,757 per trip

Lodging

- Hotel
- Rental home, condo, timeshare
- Family or friends

Information Sources

- Travel discounter
- Magazine/newspaper
- Destination website

Print Media

- Better Homes & Gardens
- Reader's Digest

*Mix of MRI Vacation Travel Attitude Statements and Monterey CVB 2013 Brand Research

TRAVEL ACTIVITY SKEWS

Motivating Trip Activities (% selected)	Money & Brains	Trend Setters	Family Connections	The Young & the Curious	Free At Last
A lot of culture and history	32%	30%	19%	42%	28%
Amazing food and wine options	43%	37%	34%	29%	32%
Attractions for kids and the family	17%	15%	20%	12%	11%
Beautiful scenery	60%	63%	62%	75%	77%
Fun night life	9%	12%	5%	4%	6%
Intimate inns and romantic experiences	10%	14%	19%	9%	11%
National parks and other outdoor options	25%	20%	26%	35%	24%
Opportunity to enjoy beaches and the ocean	37%	42%	42%	38%	41%
Opportunity to see and learn about marine environment and wildlife	6%	6%	7%	15%	9%
Outdoor adventure opportunities	19%	18%	17%	12%	24%
Shopping	18%	11%	26%	13%	13%
Wineries and wine experiences	11%	15%	7%	7%	10%
World class golf	2%	5%	8%	5%	5%
World class resorts	11%	13%	8%	6%	9%

Motivating Trip Activities (index)	Money & Brains	Trend Setters	Family Connections	The Young & the Curious	Free At Last
A lot of culture and history	108	100	63	139	93
Amazing food and wine options	126	108	98	84	93
Attractions for kids and the family	118	102	139	83	78
Beautiful scenery	89	93	91	110	113
Fun night life	124	174	78	57	82
Intimate inns and romantic experiences	86	113	155	71	89
National parks and other outdoor options	94	74	97	129	88
Opportunity to enjoy beaches and the ocean	91	103	103	93	101
Opportunity to see and learn about marine environment and wildlife	74	67	81	172	100
Outdoor adventure opportunities	106	98	97	67	133
Shopping	113	72	166	84	86
Wineries and wine experiences	101	148	68	65	99
World class golf	35	97	167	105	106
World class resorts	116	136	81	69	97

Data is from the 2013 Monterey CVB Brand Advertising Research conducted with SMARInsights

TRAVEL MOTIVATION SKEWS

Travel Motivation (5-point scale mean rating)	Money & Brains	Trend Setters	Family Connections	The Young & the Curious	Free At Last
Relaxation and rejuvenation	4.2	4.3	4.1	3.9	4.0
Enrichment or learning	3.3	3.3	3.2	3.3	3.3
Connection with family or friends	3.4	3.4	3.5	3.3	3.3
Thrills and excitement	3.3	3.2	3.4	3.0	3.1
A place to be pampered	3.1	3.0	3.1	2.7	3.0
Being amazed by the sites or experiences	4.1	4.2	4.3	3.9	4.1
Relaxation and rejuvenation	4.2	4.1	4.0	3.7	4.0
Enrichment or learning	3.0	2.9	3.0	3.0	3.0
Connection with family or friends	3.3	3.3	3.5	3.3	3.2
Thrills and excitement	3.0	3.0	3.3	2.8	2.9
A place to be pampered	3.2	3.1	3.2	2.8	2.9
Being amazed by the sites or experiences	3.6	3.5	3.7	3.4	3.6

Travel Motivation (index)	Money & Brains	Trend Setters	Family Connections	The Young & the Curious	Free At Last
Relaxation and rejuvenation	102	104	99	95	99
Enrichment or learning	100	101	97	99	101
Connection with family or friends	101	100	104	97	98
Thrills and excitement	103	101	106	94	98
A place to be pampered	105	100	103	92	100
Being amazed by the sites or experiences	99	101	104	96	99
Relaxation and rejuvenation	104	103	99	93	101
Enrichment or learning	100	97	102	101	101
Connection with family or friends	100	101	106	99	96
Thrills and excitement	102	101	110	94	96
A place to be pampered	106	101	104	93	97
Being amazed by the sites or experiences	101	98	103	95	99

Data is from the 2013 Monterey CVB Brand Advertising Research conducted with SMARInsights

VISITOR PROFILE STUDY



This report is based on only two cycles (Spring and Summer) of input. It will ultimately include survey cycles for each season; contents should be viewed accordingly.

Research Objectives

- Lodging guests are critical to the vitality of Monterey County's tourism industry. They are clearly the most important segment of visitors in terms of overall visitor spending, and as such, they are a central focus of the Monterey County CVB's marketing efforts. In order to effectively attract hotel guests to Monterey County, a clear understanding of these travelers is needed. This research attempts to develop this understanding by examining the following aspects of Monterey County lodging guests:
 - Reason for visiting Monterey County
 - Trip characteristics
 - Travel party profiles
 - In-market spending metrics
 - Travel planning resources used
 - Activities in Monterey County
 - Things liked and disliked about Monterey County
 - Demographic and geographic profiles

Methodology

This report presents interim findings of a study of Monterey County visitors who stay in commercial lodging properties. Data collection was done for the nine month period of October 2014 to June 2015. This paper integrates data collected in two distinct research efforts: (1) the Monterey County Lodging Guest Survey, and (2) the summer 2015 Monterey County Visitor Intercept Study. In both of these efforts, Monterey County visitors staying in hotels, motels and inns were surveyed, and data from these respondents are compiled for this analysis. A brief review of each follows:

Monterey County Lodging Guest Survey

The Monterey County Lodging Guest Survey is a self-administered survey currently being conducted at twenty-eight (28) participating Monterey County hotels. The survey questionnaire was developed by Destination Analysts in consultation with the Monterey County CVB, and is laid out in a one-page, tri-fold printed piece. The printed piece has been designed with a business reply panel so that upon completing the survey, Monterey County lodging guests can simply fold, seal and drop it in the mail. The printed piece also provides the URL for guests to take the survey online should they prefer. A sweepstakes to win one of several cash prizes is being offered as an incentive for hotel guests to complete the survey.

The survey is being distributed to all guests at participating properties over a two-week period during each quarter of the year. Throughout each distribution week, guests are 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, 222 completed surveys were collected since the commencement of this project in Q4 of 2014.

Monterey County Visitor Intercept Study

This visitor intercept study was a recently conducted survey of leisure visitors to Monterey County. During two weekends this summer, Destination Analysts' surveyors worked at locations throughout Monterey County and randomly intercepted a selection of visitors. In this effort, only visitors to the county were interviewed.

Visitors intercepted for this survey were asked if they were in the area for routine business purposes, and if so they were thanked and screened out. Surveyors then conducted 5-10 minute face-to-face

interviews of the travelers. In total, 349 completed surveys were collected in June 2015. The dates in the field were June 19-20, 2015 and June 26-27, 2015.

In this analysis, only visitors staying in commercial

Monterey County lodging properties are considered. The questionnaire was administered at the following locations:

- | Guest Survey Locations | |
|---|--------------------------|
| • ABVI Monterey Conference Grounds | • Hofsas House |
| • Bayside Inn | • Hotel 1110 |
| • Best Western The Inn & Suites Pacific Grove | • Inns by the Sea |
| • Big Sur River Inn | • Jabberwock Inn |
| • Captain's Inn at Moss Landing | • L'Auberge Carmel |
| • Carmel Lodge | • Martine Inn |
| • Carmel Mission Inn | • Monterey Bay Inn |
| • Casa Munras Garden Hotel & Spa | • Monterey Beach Resort |
| • Four Sisters Inn | • Monterey Hostel |
| • Glen Oaks Big Sur | • Monterey Marriott |
| • Happy Landing Inn | • Portola Hotel & Spa |
| | • Tradewinds Carmel |
| | • Sprindrift Inn |
| | • The Stevenson Monterey |
| | • Victorian Inn |
| | • Villa Franca Inn |

Visitor Intercept Study Locations

- Cannery Row
- Fisherman's Wharf
- Lover's Point
- Carmel Plaza
- Monterey Marriott
- Portola Hotel & Spa
- Old Town Salinas

Quick Facts: The Monterey County Lodging Guest

Demographics

Average age 50 years

Average annual household income \$126,073

International Visitors 7.7% • Visitors from California 74.4%

Marital Status

Married 67.3% Domestic partnership 5.2% Single 20.4% Children under the age of 18 26.6%

Ethnicity

Caucasian 70.1% Latino 7.3% Asian/Pacific 7.3% Black 3.5%

An abbreviated profile of Monterey County's lodging guests:

- Vacation or a weekend getaway trip 85.7%
- First time visitors to Monterey County 20.1%
- Visitors per hotel room (average) 2.8
- Average travel party size 2.3 persons
- Average length of stay 3.1 days

Most popular activities

- Dining in restaurants 90.0%
- Shopping 71.0%
- Outdoor activities 39.0%

Spending

- Spending per day (travel party) \$550.36
- Spending per-person, per day \$203.84

Most important reasons for trip

- Scenic beauty 69.5%
- Monterey County's overall ambiance 46.8%
- Restaurants, cuisine, food culture 40.7%

Most visited attractions

- Old Fisherman's Wharf 52.9%
- State park or beach 52.7%
- Cannery Row 50.5%

Top planning resources uses (before arrival)

- Online travel agencies 38.0%
- User-generated content 21.1%
- Opinions of friends or relatives 19.4%

Top planning resources uses (while in MC)

- Information gathered on mobile phone 16.7%
- Free travel guide book(s) 10.3%
- User-generated content 7.8%

Most liked about MC

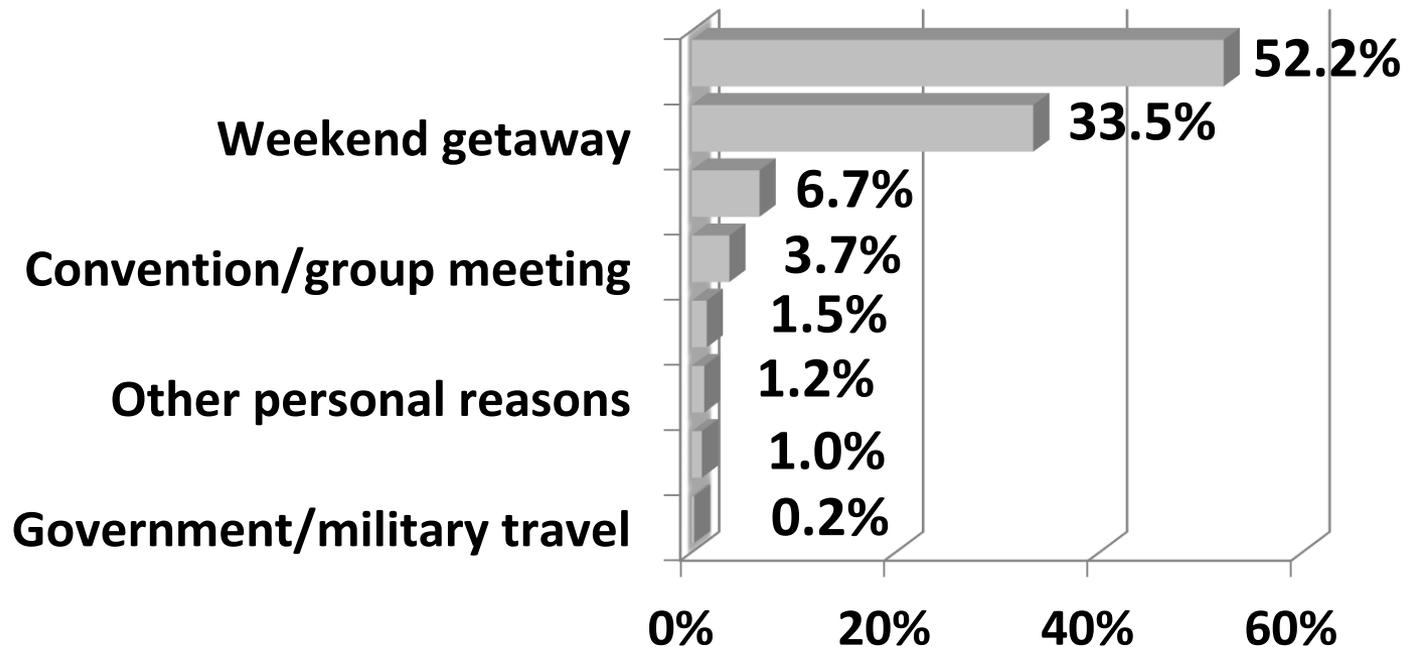
- Beach/Ocean 20.0%
- Weather 17.9%
- Beautiful/Nature 16.2%

Least liked about MC

- Traffic 16.5%
- Parking 15.9%

Primary Reason for Monterey County Trip

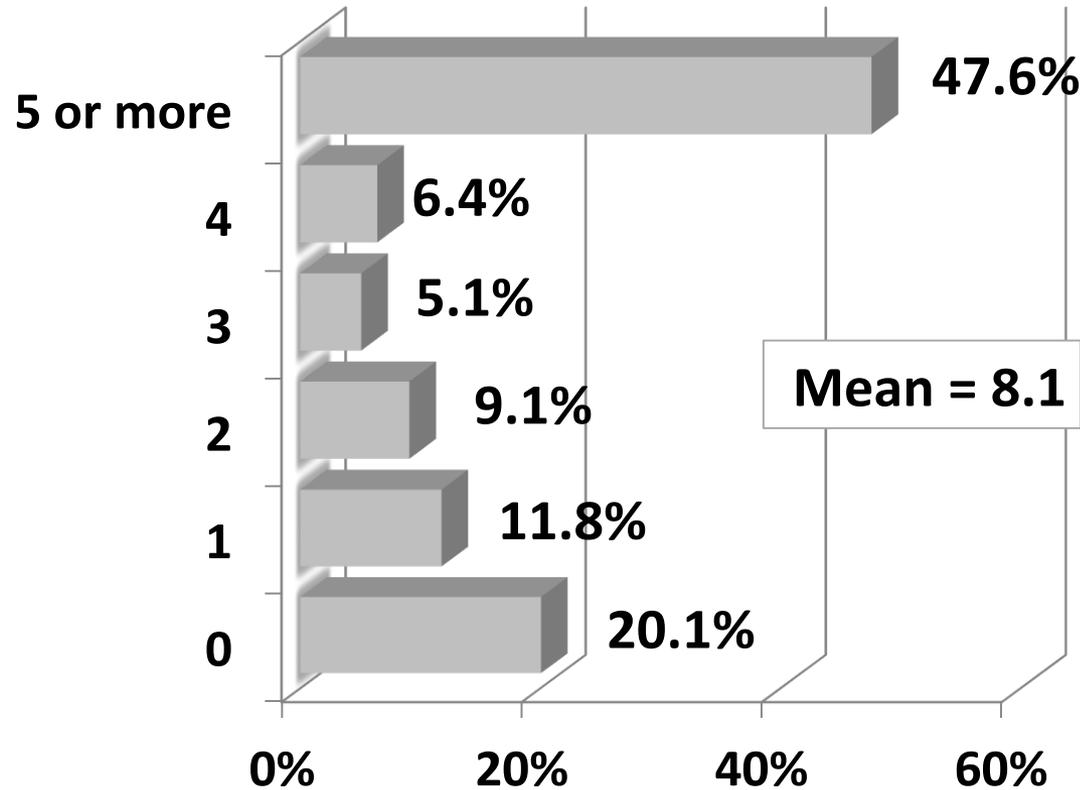
Over half of Monterey County's visitors intercepted during the period of study (52.2%) came to the city for vacation. 33.5 percent visited for a weekend getaway. Combined, 85.7 percent of people visited Monterey County for a leisure trip.



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

Past Visitation to Monterey County

Monterey County hosts a substantial proportion of repeat visitors. 79.9 percent reported having previously visited Monterey County. The average visitor has made 8.1 previous visits to Monterey County.

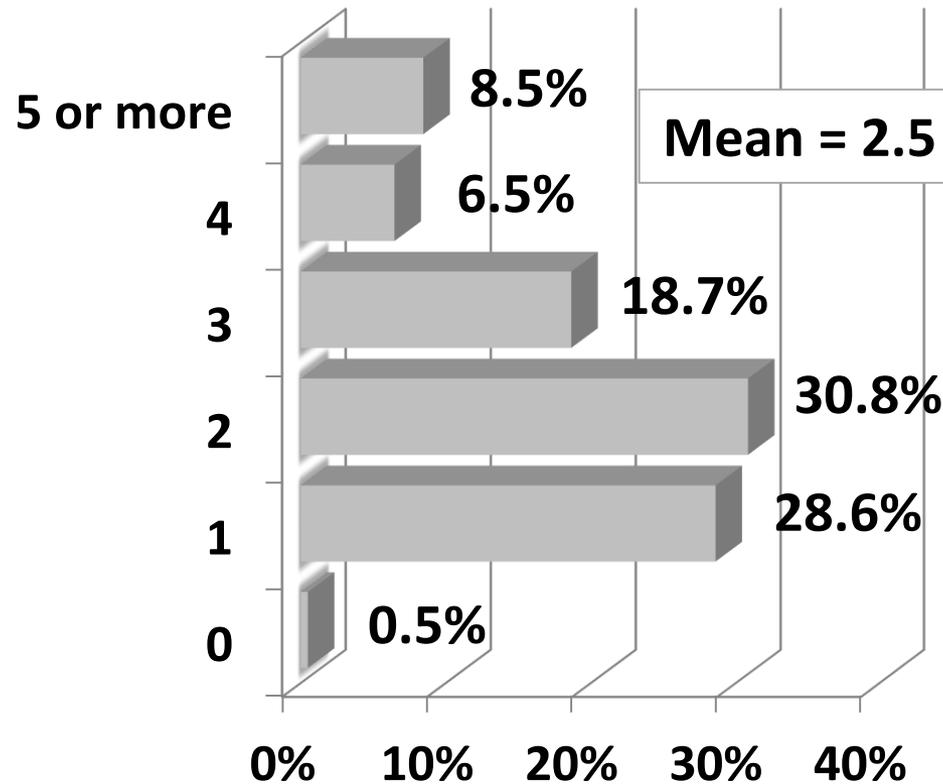


Question: Prior to this visit, how many times have you been to Monterey County?
(Zero if this is your first time)



Nights in Monterey County

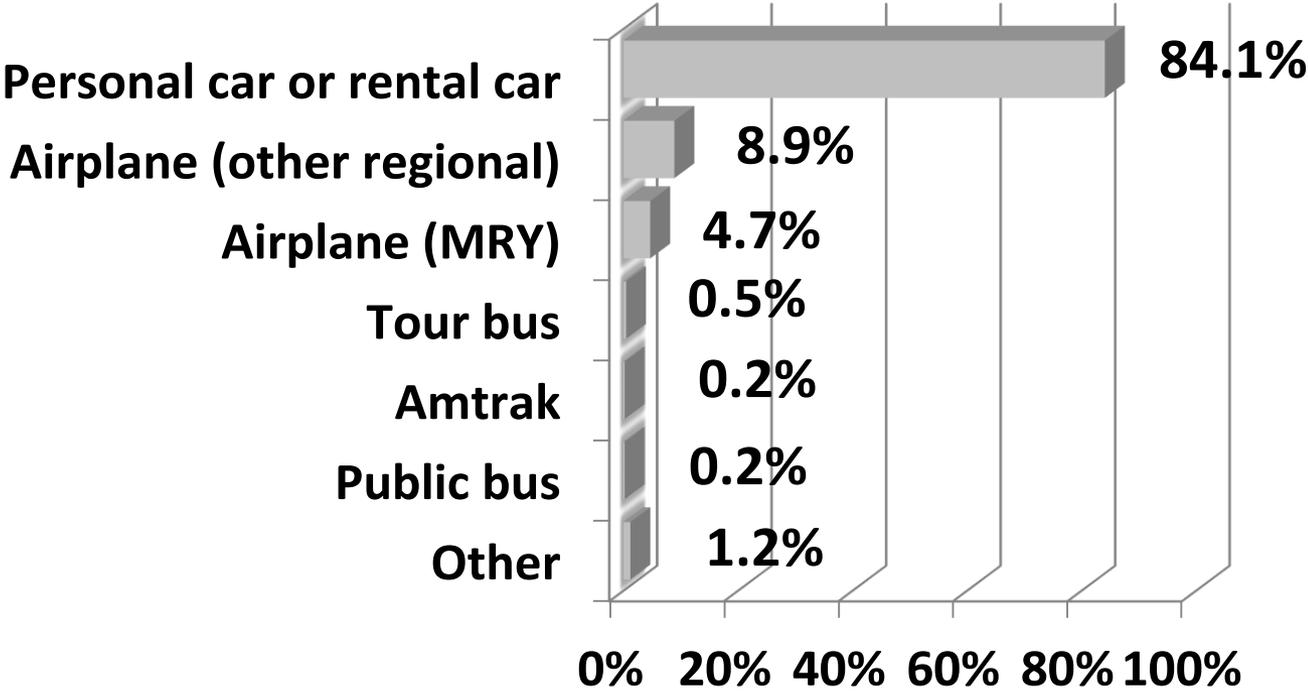
The average Monterey County lodging guest spent 2.5 nights in the county during their trip.



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

Method of Arrival

Monterey County lodging guests arrive by a variety of methods, with driving in via automobile being the most popular mode of transit (84.1%). The next most common method of arrival was flying into other regional airports (8.9%) and the Monterey Regional Airport (4.7%).



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



Activities in Monterey County

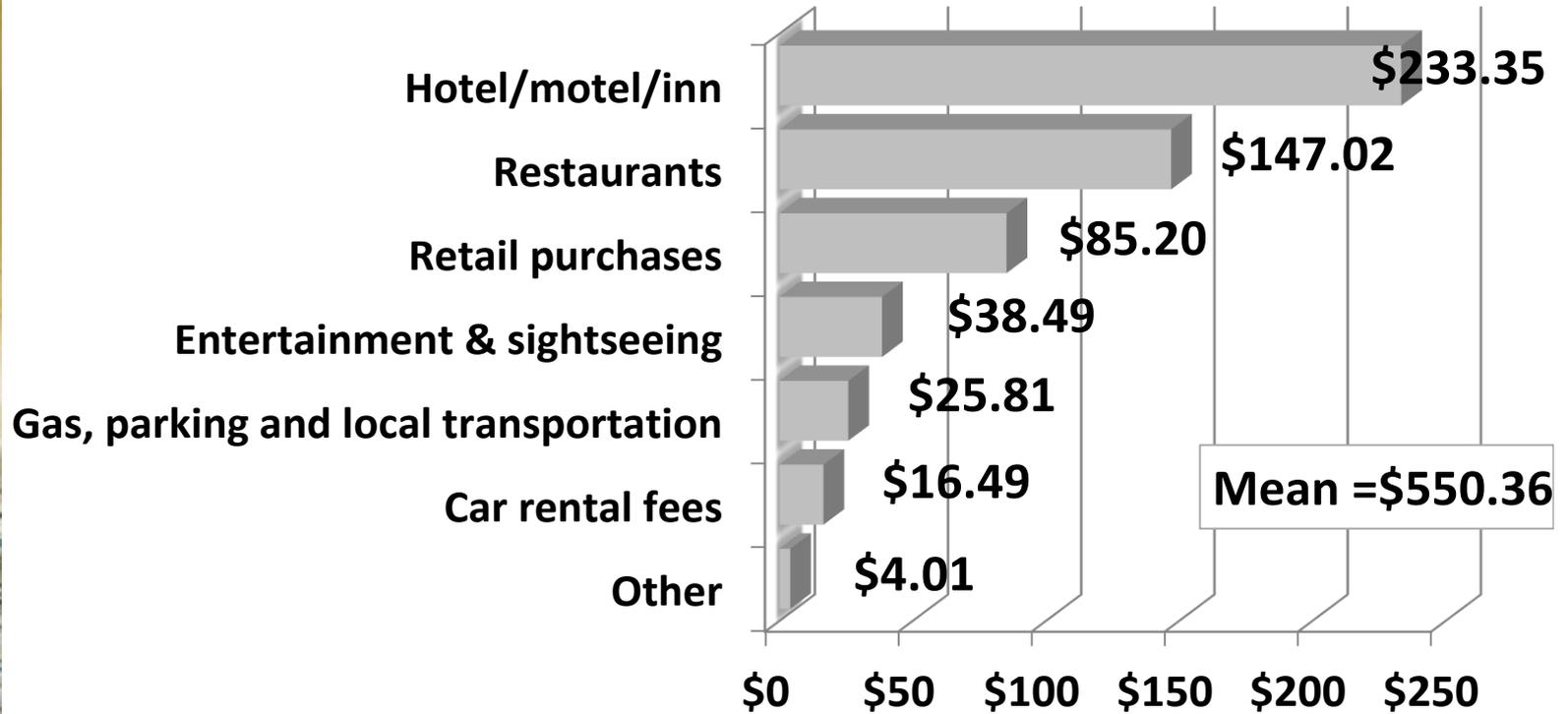
Monterey County’s lodging guests engage in a myriad of activities during their trip. The most popular Monterey County activities participated in were dining in restaurants (90.0%), shopping (71.0%), outdoor activities (39.0%) and visiting friends or family (19.2%).

Dining in restaurants	90.0%
Shopping	71.0%
Outdoor recreation	39.0%
Other	19.8%
Visit friends or family	18.5%
Spa	9.8%
Nightlife/bars/clubs	9.0%
Visit wineries	8.3%
Guided tour	8.0%
Food/wine event	7.3%
Golf	6.6%
Sporting event	1.0%

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

Spending Per Day, Per Travel Party

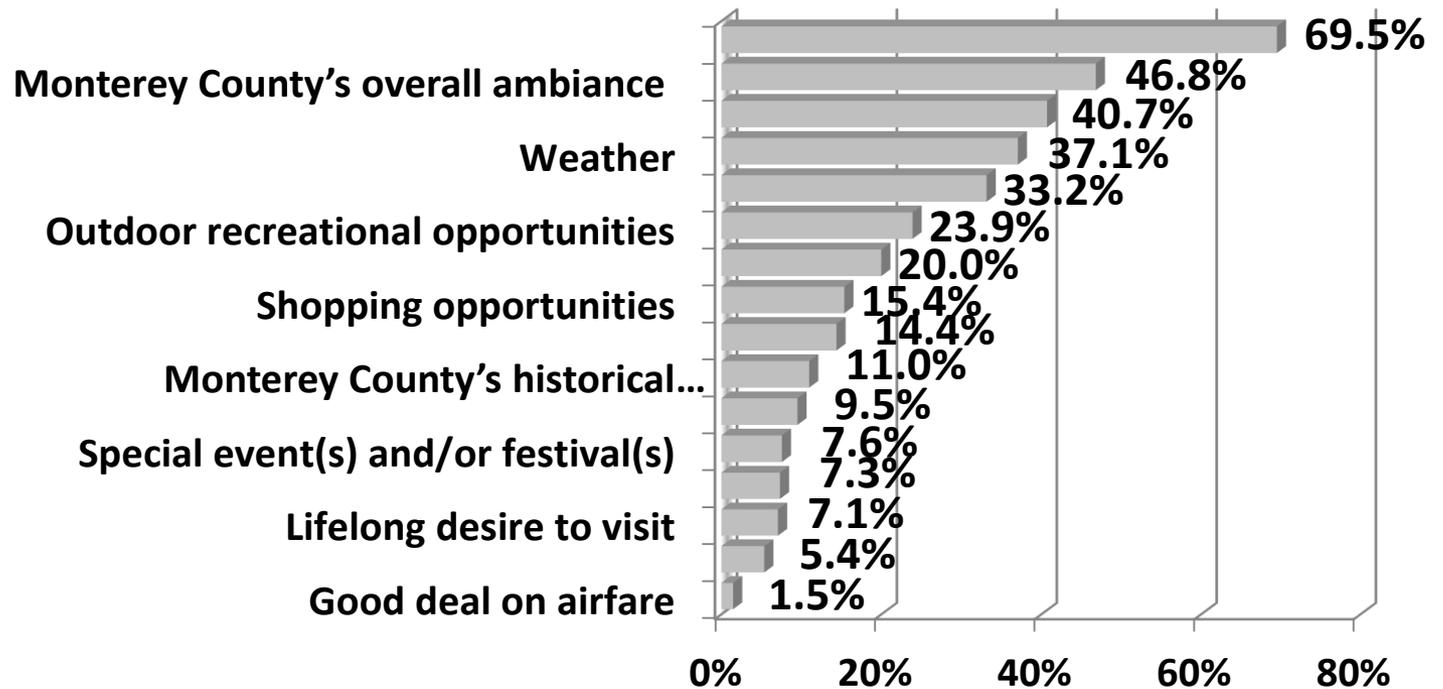
On average, lodging guests in Monterey County spent \$550.36 per day in the county. The bulk of this spending is attributed to accommodations (\$233.35), followed by restaurants (\$147.02). Other top expenditures include retail store purchases (\$85.20) and entertainment and sightseeing (\$38.49).



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

Important Factors to Destination Decision

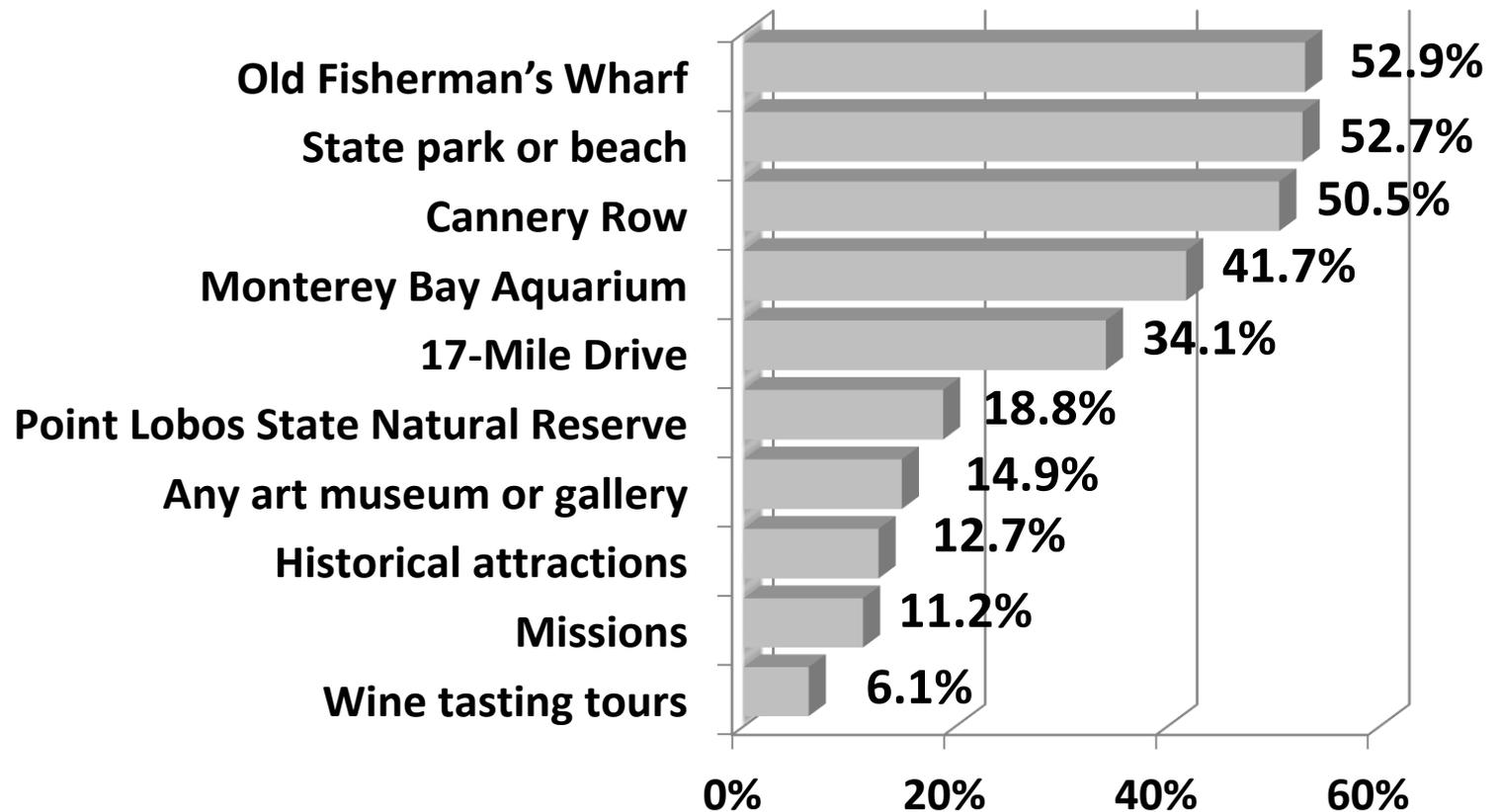
Over two-thirds of lodging guests reported that scenic beauty (69.5%) was important to their decision to travel to Monterey County. Other factors that were most important to their decision to visit the county include Monterey County's overall ambiance (46.8%), restaurants (40.7%), weather (37.1%), and area attractions (33.2%).



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

Attractions Visited

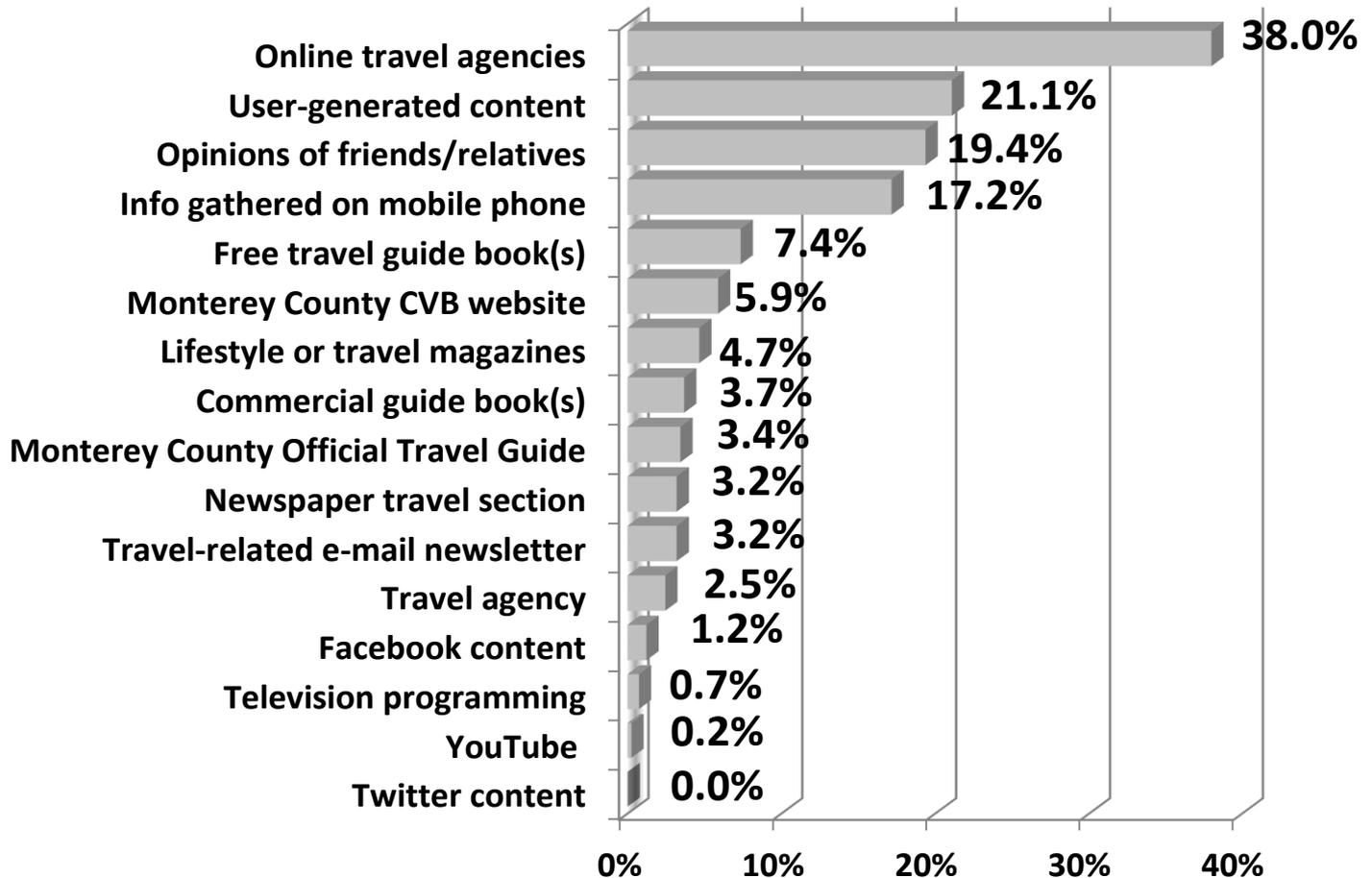
Presented with a list of 12 Monterey County attractions, respondents identified their top ten most visited attractions. The most frequented Monterey County attraction is Old Fisherman's Wharf (52.9%). The next most visited attractions were a state park or beach (52.7%), Cannery Row (50.5%), Monterey Bay Aquarium (41.7%), and 17-Mile Drive (34.1%).



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

Resources Used Before Arrival

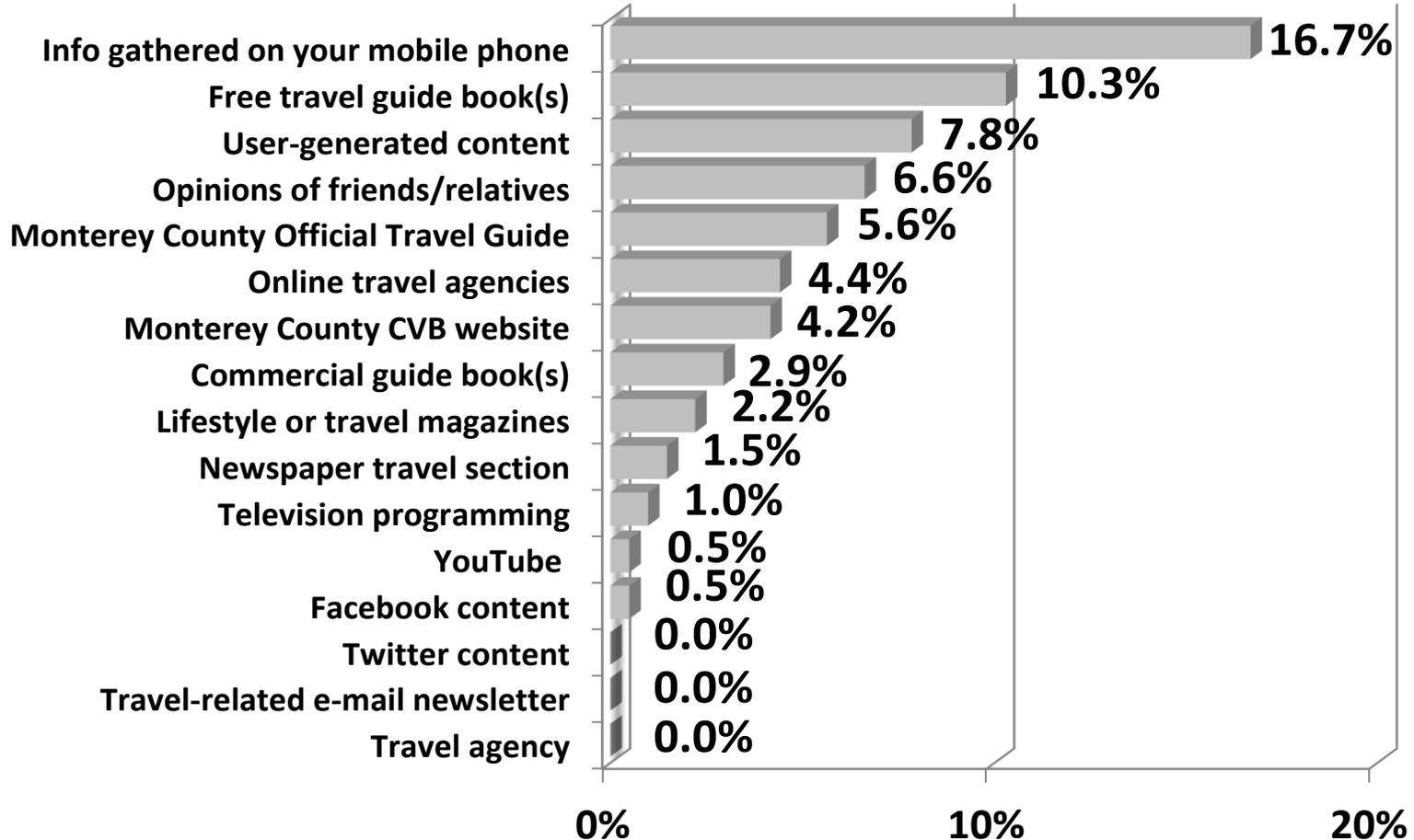
Before arriving in Monterey County, over one-third of lodging guests used online travel agencies (38.0%) to plan their trip. About one in five respondents reviewed user-generated content/reviews websites (21.1%), listened to opinions of friends and/or relatives (19.4%), and gathered information on their mobile phone (17.2%).



Question: Which of the following resources did you use to plan your Monterey County trip before arriving and which did you (or will you) use while in the city? (Select all that apply)

Resources Used In-Market

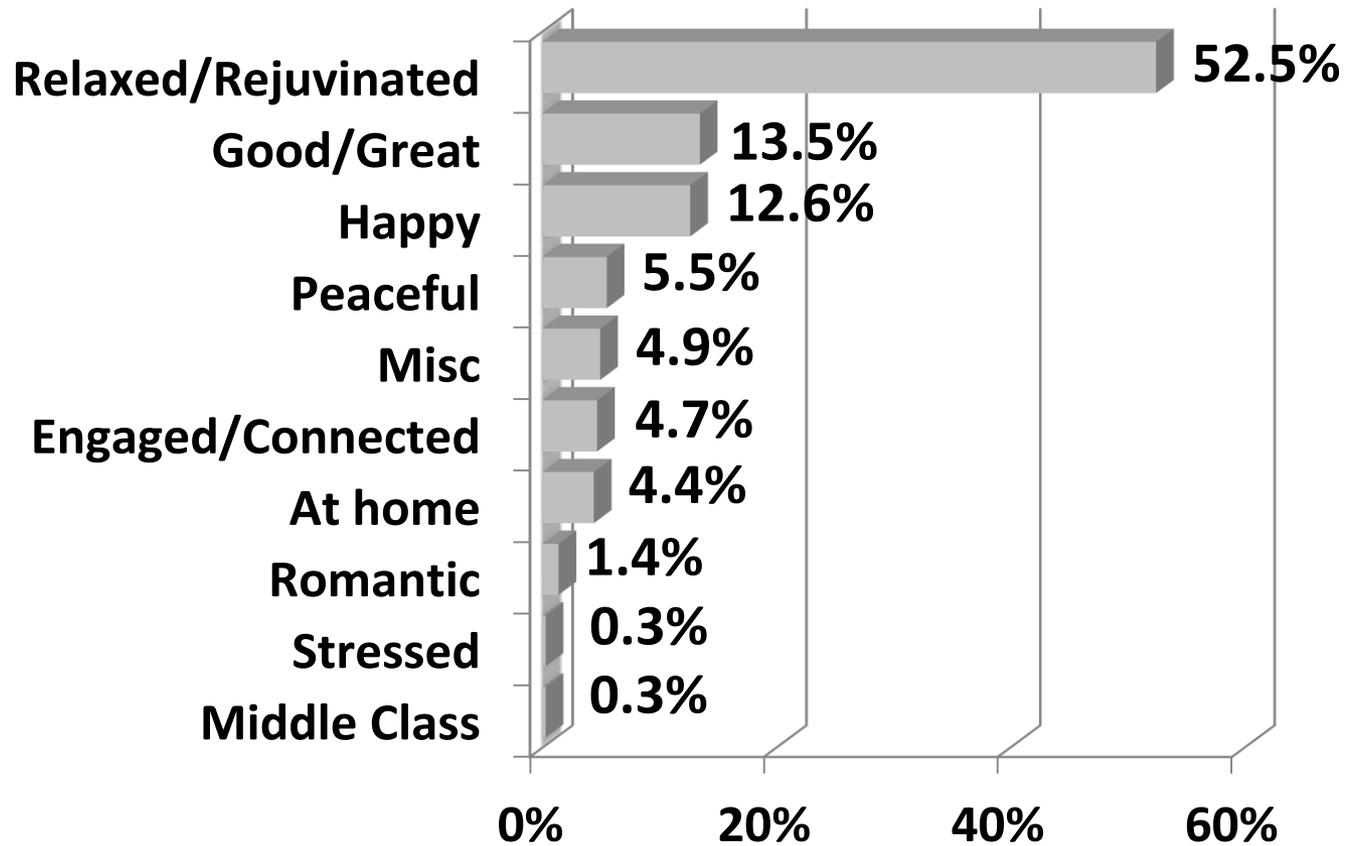
While in Monterey County, 16.7 percent of respondents gathered trip planning information from their mobile phone, while one in ten used the free travel guide book(s) (10.3%). 7.8 percent of visitors reviewed user-generated content to help plan their trip.



Question: Which of the following resources did you use to plan your Monterey County trip before arriving and which did you (or will you) use while in the city? (Select all that apply)

Feeling in Monterey County

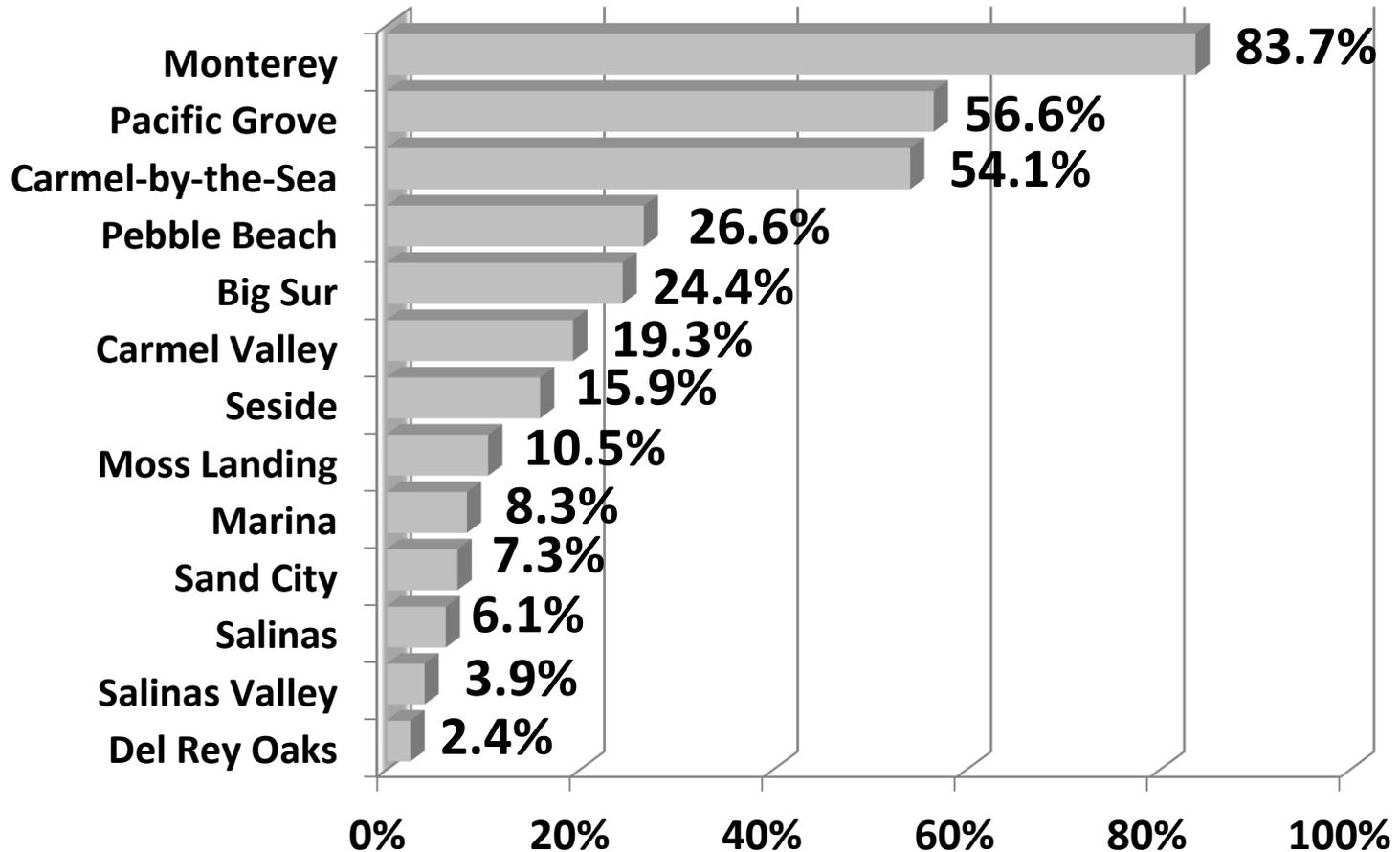
When asked how lodging guests feel when in Monterey County, more than half responded with “relaxed/rejuvenated”(52.5%), followed by “great/good” (13.5%) and “happy” (13.8%). Only 0.3 percent of respondents reported a negative feeling when in Monterey County (“stressed”).



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

Monterey County Areas Visited

When asked which areas of Monterey County respondents visited, the city of Monterey was, by far, the most popular destination (83.7%). The next most visited areas were Pacific Grove (56.6%), Carmel-by-the-Sea (54.1%), and Pebble Beach (26.6%).

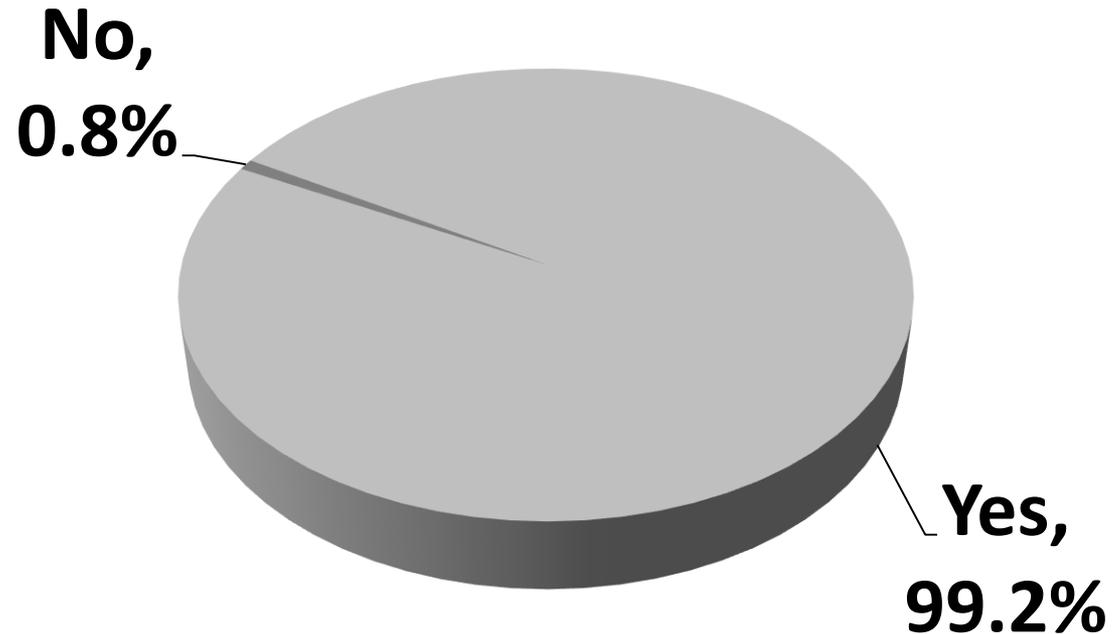


Question: Which of these Monterey County areas did you, or will you, visit on this trip?
(Select all that apply)



Interest in Return Trip to Monterey County

Monterey County satisfies its visitors. Nearly all visitors, 99.2 lodging guests, reported that they would return to Monterey County.



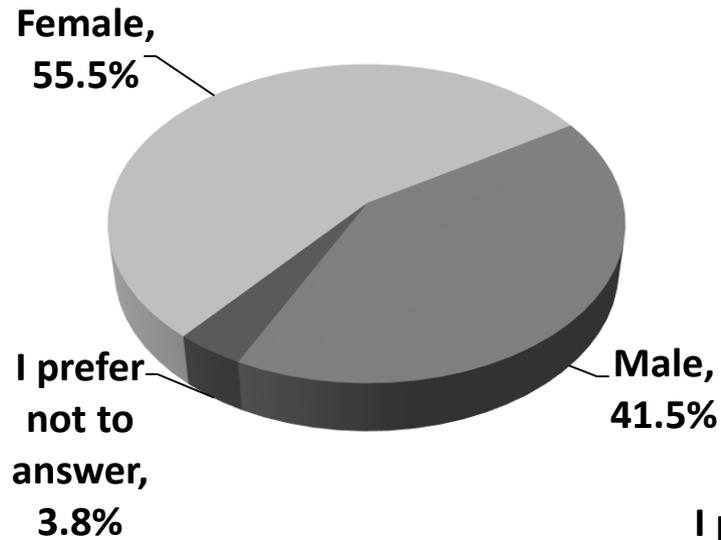
Question: Would you return to Monterey County?

Sample Demographics

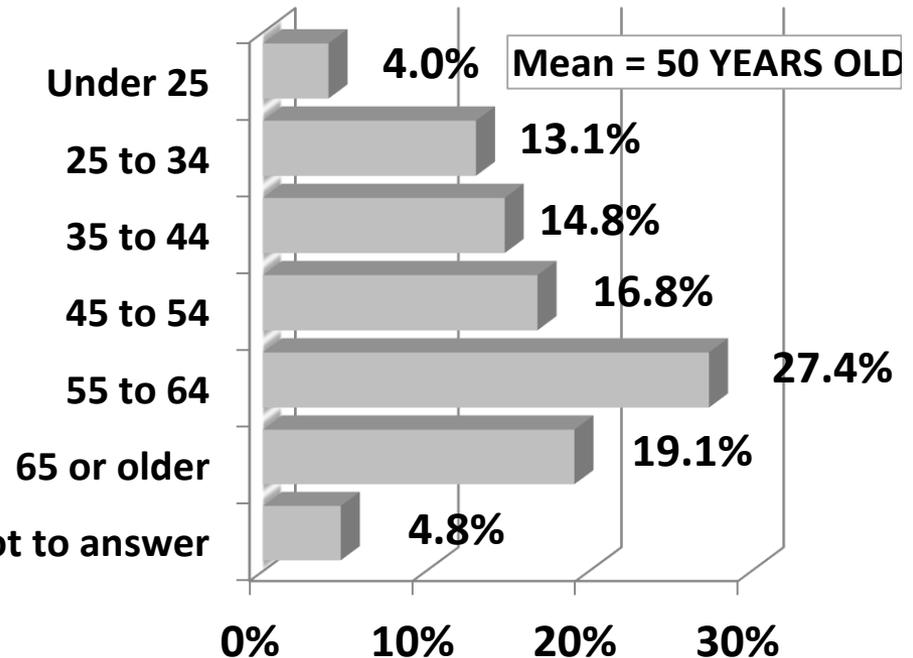
A person in a yellow kayak is paddling on the ocean. In the background, there is a large, craggy rock formation. The scene is bright and slightly hazy, suggesting a sunny day. The kayaker is wearing a blue cap and a life vest. The water is white with small waves.

MONTEREY
Grab life by the moments:

GENDER & AGE



QUESTION: WHAT IS YOUR GENDER?

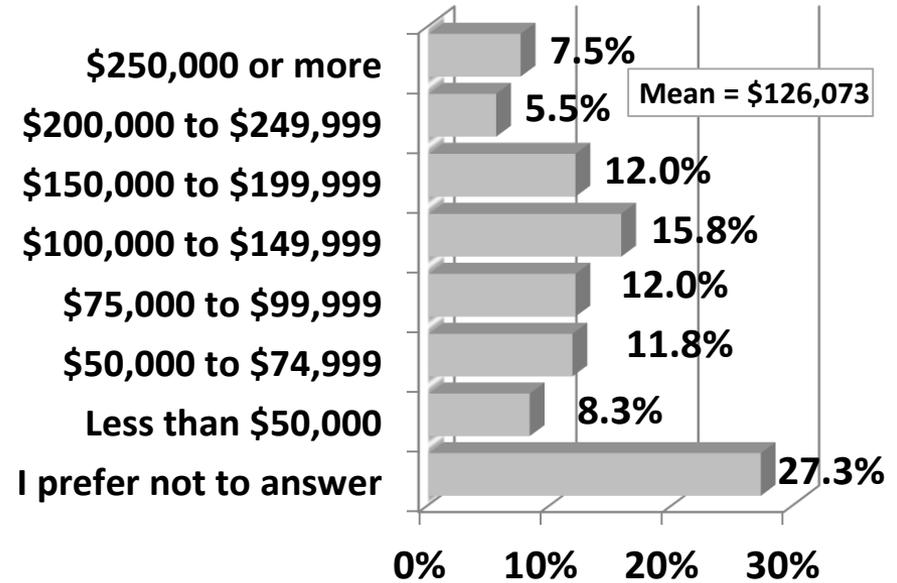


QUESTION: WHICH IS YOUR AGE?

Annual Household Income & Marital Status

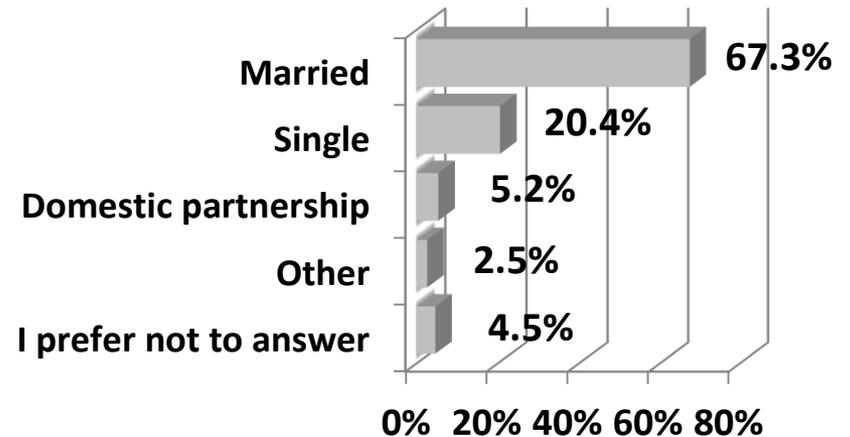
Monterey County's lodging guests are an affluent group. 40.5 percent have an annual household income of \$100,000 or more, with the average annual household income being \$126,073.

Question: Which of the following best describes the combined annual income of all members of your household?



Almost three-quarters of respondents are married (67.3%) or in a domestic partnership (5.2%), while 20.4 percent are single.

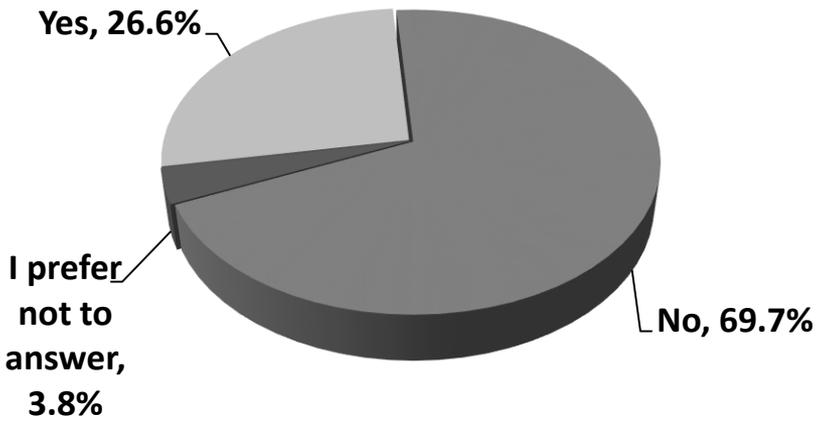
Question: Which of the following best describes your current marital status?



Children in Household & Ethnicity

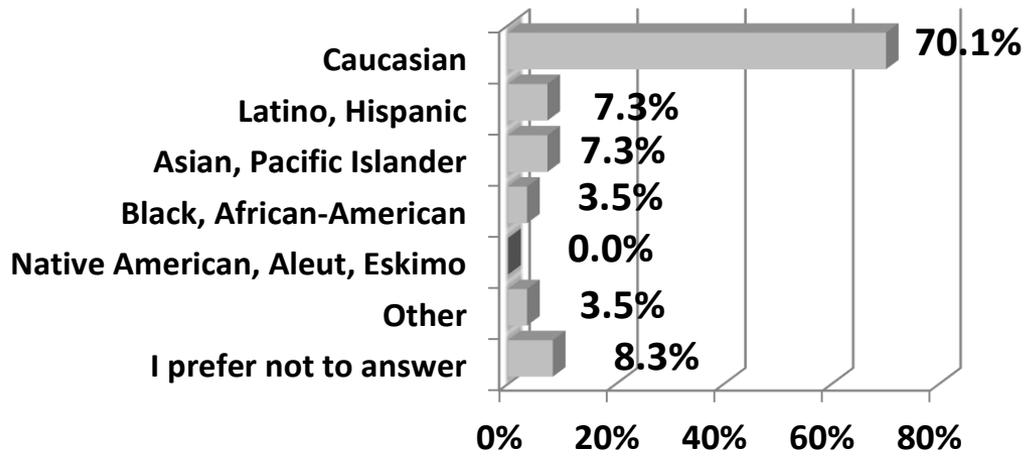
Children in Household

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



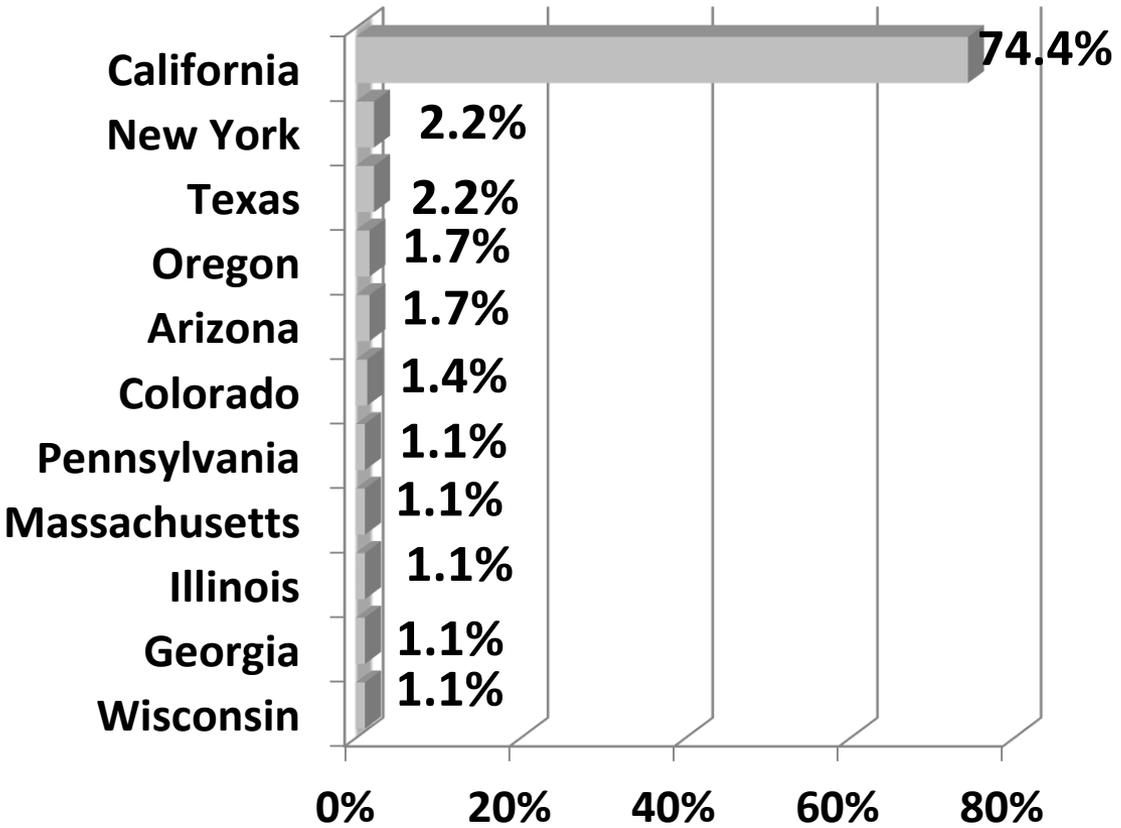
Ethnicity

Question: Which best describes your ethnicity?



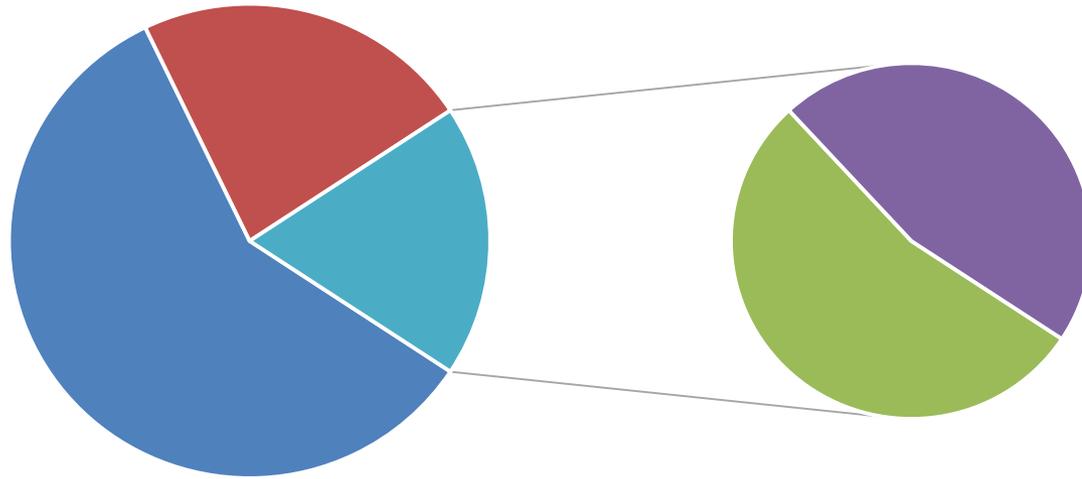
Point of Origin

74.4 percent of Monterey County's visitors surveyed were from within the state of California. Visitors also came from New York (2.2%), Texas (2.2%), Oregon (1.7%), and Arizona (1.7%).



Question: What is your zip/postal code?

MEDIA PLANNING PARAMETERS



Geographic

Main areas of geographic focus are North to Sacramento, East to Reno and Las Vegas and south to San Diego. However, we also use national online media to reach people specifically seeking a Monterey vacation.

Media segments

From a Demo/Psychographic targeting standpoint, we target three Life-stage groups:

F1 “Accumulated Wealth”

- Generally defined as Wealthy families with Kids living at home. They are college educated, white collar Baby Boomers. They have disposable cash, and indulge their children with the latest gadgets and take frequent vacations. Purchases tend to be top of line, i.e. they buy the best sports equipment for their kids.
 - Age: 35-54
 - Income: \$100k+
 - Suburban

F2 “Young Accumulators”

- Essentially the Accumulated Wealth group, but a few years younger. They are starting to live in detached homes in the suburbs, so they are a mix of Urban and Suburban with kids at home. White collar and college educated, they are more racially mixed than the Accumulated Wealth group. “Soccer Moms” come from this Life-stage group. They are starting to take family vacations and welcome a mix of fun and learning when on vacation. This group includes upper middle class 1st and 2nd generation immigrants. High ownership of computers and love outdoor activities like powerboating and camping.
 - Age 25-54
 - Income: \$70k+
 - Mix of Urban and Suburban

Y1 “Midlife Success”

- Childless singles couples in their 30’s, 40’s and 50’s. Executives/professionals who spend a lot of time and money on themselves. They spend on travel, the latest tech, and exercise equipment. They are the chic residents of smaller market cities like Fresno and Reno. They own their homes and don’t mind a commute from their comfortable lives. Not cutting edge, they buy proven products but don’t have unlimited funds, despite not having kids. Their travel habits are couples based, but not necessarily “romantic”.
 - Age:30-54
 - Income \$70k+ (DINKS: Dual Income No Kids)
 - Suburban

*Note that incomes are based on national averages, We assume that SF and LA residents require at least \$15k more income to live within the Life-stages shown.