



Marketing Impact Research

FY21-22 Midyear

January 2022

Background & Objectives

- This research is the midyear tracking measure of Monterey County Convention & Visitors Bureau's marketing efforts, which reflect the reach and impact of new creative. The *Now Is The Moment* campaign builds on the former *Grab Life By The Moments* campaign, which ran from 2013 up until the pandemic. The results reported here cover travel from July through December 2021.
- In measures conducted in 2020 and early 2021, consumers were segmented into those Ready to Travel and those merely Anticipating Travel. As of midyear FY21-22, a significant enough share of consumers have resumed leisure travel that there is no reason to continue segmenting based on travel readiness. The findings reported here are based on current leisure traveler response.
- Specific objectives of this research are to:
 - Measure reach of the campaign among leisure travelers and explore the overlap between paid ads and PR
 - Measure strength of the creative
 - Evaluate the campaign's effectiveness at generating visit interest and visitation
 - Estimate ad-influenced travel and associated travel revenue
 - Provide conclusions and recommendations to help inform MCCVB's marketing efforts

Methodology

- The advertising effectiveness methodology requires respondents to view the actual ads in order to gauge awareness, so SMARInsights developed and programmed an online survey. National sample vendors provided a link to the survey to potential respondents.
- Markets were sampled as shown at right and weighted to be representative of the population. To be comparable to prior measures (specifically the FY20-21 midyear), markets were grouped into **Drive (California markets plus Las Vegas), Fly (Seattle, Dallas and Phoenix), and Other National.**
- In order to qualify for the survey, respondents had to be travelers who take overnight leisure trips and are travel decision-makers for their households. Overall, 966 interviews were completed in December 2021.
- In pre-pandemic research, the leisure travel incidence was 83% domestically. As of the fielding of this research, travel incidence is 75%. This reflects the hesitance of some typical leisure travelers to resume travel.
- Upon completion of data collection, the data were cleaned, coded and weighted to be representative of the population. The following report summarizes the results of the survey. A copy of the questionnaire used for data collection appears in the Appendix to this report.

Surveys		
TV markets	San Francisco	101
	Sacramento	101
	San Diego	101
	Fresno	100
	Seattle	100
Other California	Los Angeles	100
	San Jose	
Regional	Las Vegas	230
	Phoenix	
	Dallas	
National		160
TOTAL		966

Insights + Recommendations

- People were more comfortable traveling in the late summer and fall of 2021. While this was a net positive, it made for some unpredictable results. For instance, there was less reaction to the marketing from drive markets as nearby travelers felt comfortable visiting other competitive destinations again. But there were gains from more distant markets as people ventured farther from home.
- In this environment, MCCVB's FY21-22 highly efficient campaign generated just over a quarter of the county's leisure room demand in the first half of the fiscal year.
- Among Drive markets, the advertising brought in \$53 million in visitor spending and an ROI of \$71. Compared to the summer 2021 measure, more travelers had resumed travel and visitors spent more on their trips. In the Fly and Other National markets, the campaign generated a strong travel increment, netting nearly 200,000 influenced trips for the county.
- Besides generating trips and visitor spending, the marketing positively impacted Brand Awareness and Likelihood to Visit – boosting Monterey County from at or below the bottom of the competitive set on these measures to among the leading destinations. In both the Drive and Fly markets, ad-aware brand awareness *and* likelihood to visit were higher in this measure than at the end of FY20-21, illustrating that the marketing is building brand awareness and interest over time.
- The campaign lifted the Brand Goal Measure to the goal level in the Drive markets, and positively impacted perceptions of the destination, including its COVID safety and views of it as a sustainable destination.

Insights + Recommendations

- The creative received excellent ratings (in the top 10% of ads that SMARInsights has tested) for showing a wide variety of sights and activities in Monterey County and for making travelers more interested in visiting.
- The national audience remains harder to understand than the surrounding region due to its size and diversity, particularly as it relates to familiarity with and perceptions of Monterey County, and because we have less data from consumers in more distant markets. A more robust national sample in future research would enable a more thorough exploration of national geographies.
- The extremely positive results from the national market – with low marketing investment – is potentially a result of consumer reaction in mid- to late-2021 to coming out of the pandemic. Recognition that COVID-19 is likely going to be an influence for a long time has challenged this initial optimism, so we are not likely to see these kinds of results consistently.
- While more travelers are resuming leisure travel, lingering public health concerns mean that many are still avoiding big cities and major urban areas. This bodes well for Monterey County, and the marketing does inform travelers of the destination's safety relative to the pandemic.
- The results measured here also build on advertising that continued throughout the pandemic – prior research confirmed that the creative successfully generated interest in Monterey County. Pent-up demand by consumers who felt they had been liberated from the confines of pandemic safety measures responded very enthusiastically in the first half of FY21-22. However, we would caution against expecting these results to continue at this pace going forward, since new variants are presenting renewed obstacles to “normal” leisure travel.

Marketing Target

- MCCVB's marketing target – travelers aged 35-64 with household incomes of \$150,000 or more, responsibly-minded – presents challenge and opportunity. The challenge is in finding this population as it is a narrow audience. The opportunity is its fitness for the destination and its value as visitors.
- Current data show that the marketing target has higher awareness of the marketing, higher baseline interest in a Monterey County visit *and* the ads generate a greater lift in likelihood to visit among this target. Target travelers who visit spend more in the county. However, there is a small sample of target travelers in this data. A more robust sample would enable measurement with a higher degree of accuracy.
- SMARInsights' recommendation in research going forward would be to layer on a target sample in the Drive, Fly, and National markets, along with the Drive markets' general traveler sample. This would enable continued tracking of the reach and impact of the marketing in nearby markets, as well as among the high-value target audience across a broad geography.

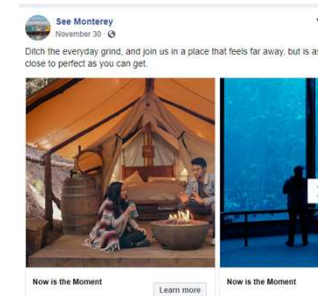
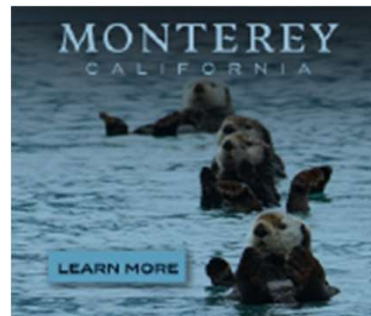
Pandemic Considerations

- 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, a whole host of variables complicates that formula, including:
 - **COVID-19** – This is the most obvious and most disruptive element in the landscape, interrupting travel plans, reducing likelihood to travel, and changing the way people choose and get to destinations. While the vaccine has curbed the influence of the virus somewhat, impacts are still playing out in the travel landscape, such as vaccine hesitancy, the mask debate, etc. Additionally, the emergence of new strains (Delta and Omicron) and regional spikes in cases continue to impact consumers and their attitudes.
 - **Changes in travel behavior/preferences** – The concern about crowds and larger urban areas led people to flock to more rural destinations, such as Monterey County. In some communities, this has resulted in issues of overtourism.
 - **Responsible travel** – The conversation around responsible travel and sustainability – in which MCCVB was an early leading voice – has become much more widespread and a consideration factor for a subset of travelers.

Campaign

- New campaign, *Now is the Moment*.
- Video spot ran digitally and via broadcast in the Bay Area, Central Valley, San Diego and Seattle. All other markets are digital only.

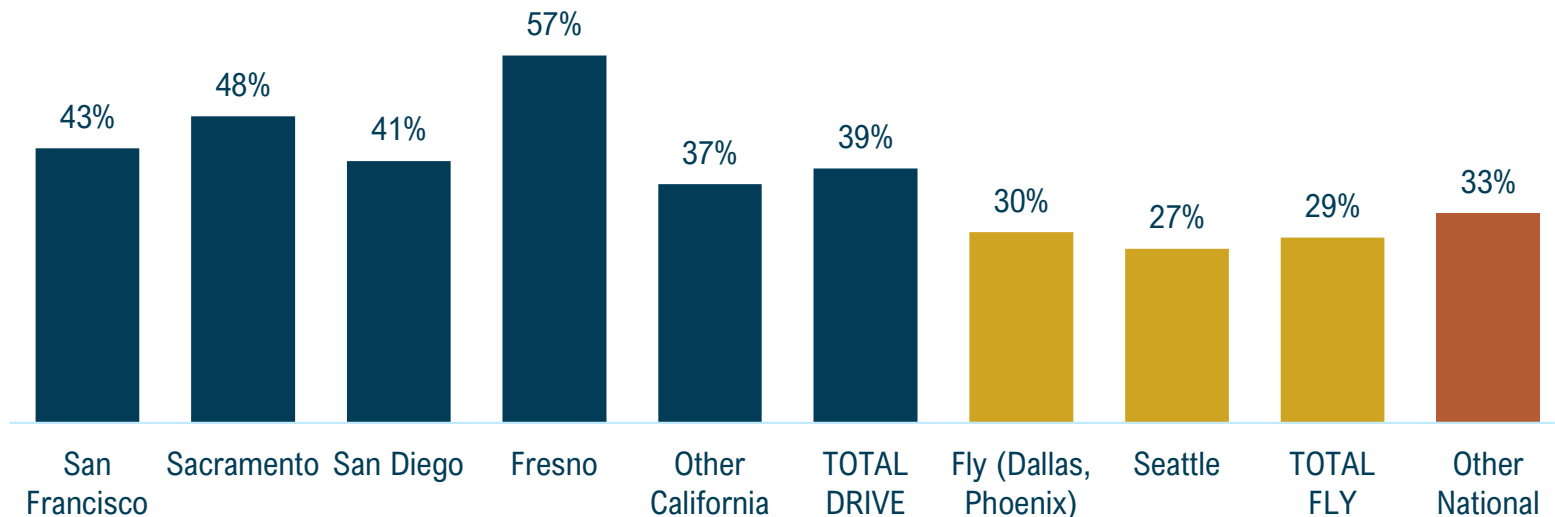
Jul-Dec	2018-19	2021-22
Drive	\$126,591	\$745,741
National (Fly + Other National)	\$203,939	\$319,603
Total	\$330,530	\$1,065,344



Awareness

- The ads reached a third of travelers, with higher reach in the Drive markets.
- TV markets (the specific DMAs called out in the chart below) generally have higher recall of the paid advertising, but Seattle is an exception.

Paid Ad Awareness



Efficiency

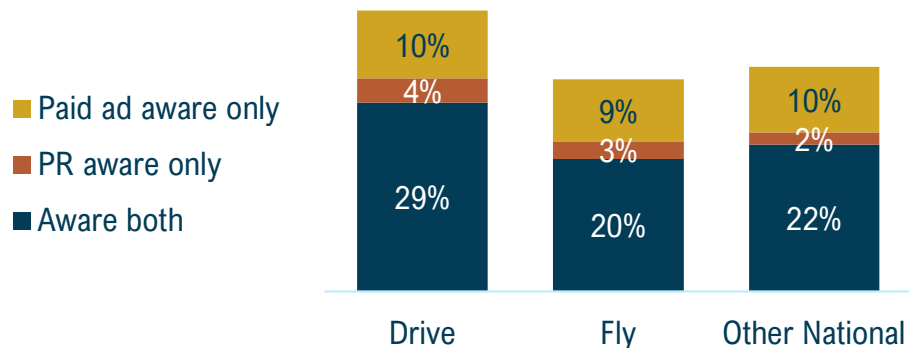
- Higher awareness in the Drive markets is consistent with higher advertising investment in these markets.
- It cost MCCVB 20 cents to reach an ad-aware household in these markets, which is in line with the FY20-21 cost of 19 cents per ad-aware drive market household.
- Lower spending in the Fly and Other National markets generated lower awareness, but much higher efficiency.
- Both of these groups are below the average cost per aware household of 50 cents, meaning MCCVB's campaign is more efficient than average.

2021-22 Midyear	Drive	Fly	Other National
HH	9,340,419	5,429,109	53,663,119
Awareness	39%	29%	33%
Aware HH	3,685,069	1,561,393	17,440,514
Ad spending	\$745,741	\$319,603	
CPAH	\$0.20	\$0.02	

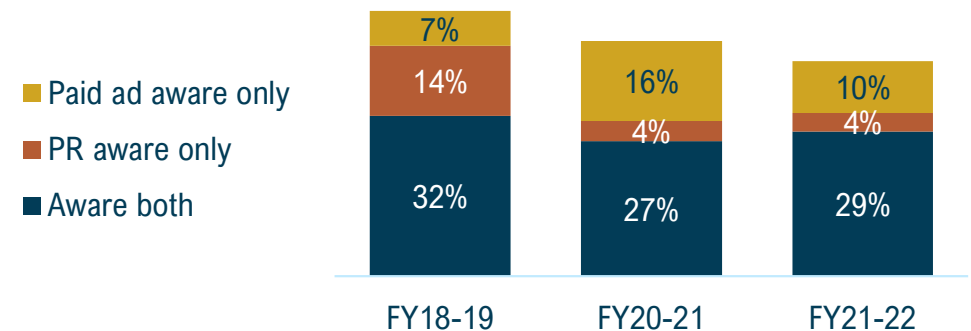
PR Awareness + PR/Ad Overlap

- MCCVB's marketing program aims to reach travelers with paid ads and layer on exposure to PR for maximum impact. The FY21-22 effort has been successful in doing so, with more than half of aware travelers recalling both paid ads and PR.
- Comparing the level of overlap in the Drive markets – which have received MCCVB marketing longer than other more distant markets – the current campaign is comparable to the FY20-21 campaign. Neither has reached pre-pandemic performance.
- The marketing targeted travelers ages 35 to 64 with household incomes of \$150,000 or more. While recall among these consumers is higher than among travelers overall (79% vs. 37%), this target represents just 7% of travelers.

Ad/PR Overlap



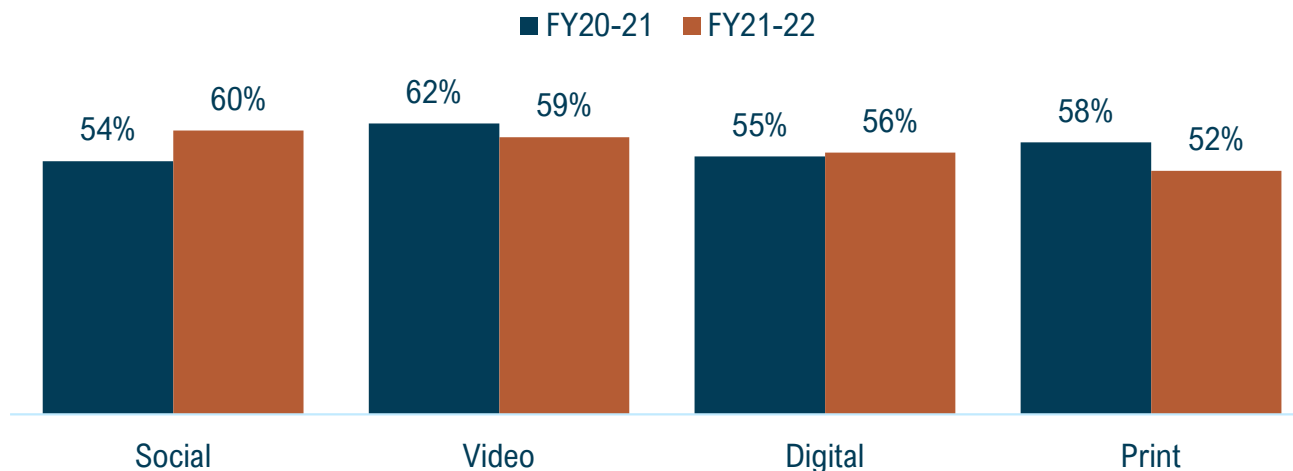
Overlap in Drive Markets Year to Year



Reaction to Creative

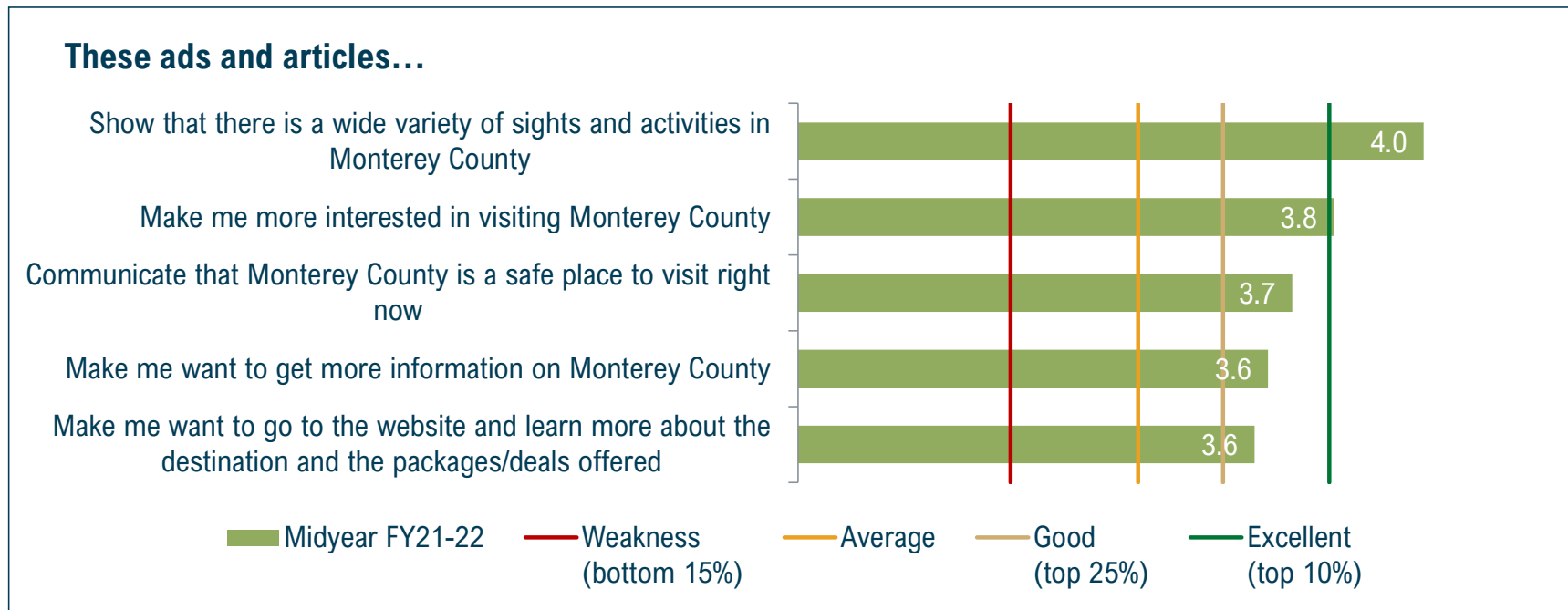
- The *Now is the Moment* campaign receives similar response to the prior year's marketing, with more than half of respondents indicating ads in each medium make them want to visit Monterey County.
- There is considerable overlap across media, however, in terms of the images and layout. And FY20-21 creative included *Now is the Moment* executions (including the brand video) as well as *Permission to Roam*. This year's ads introduced responsible travel messaging.

How much do you agree that these ads make you want to visit Monterey County? Top 2 box



Creative Evaluation

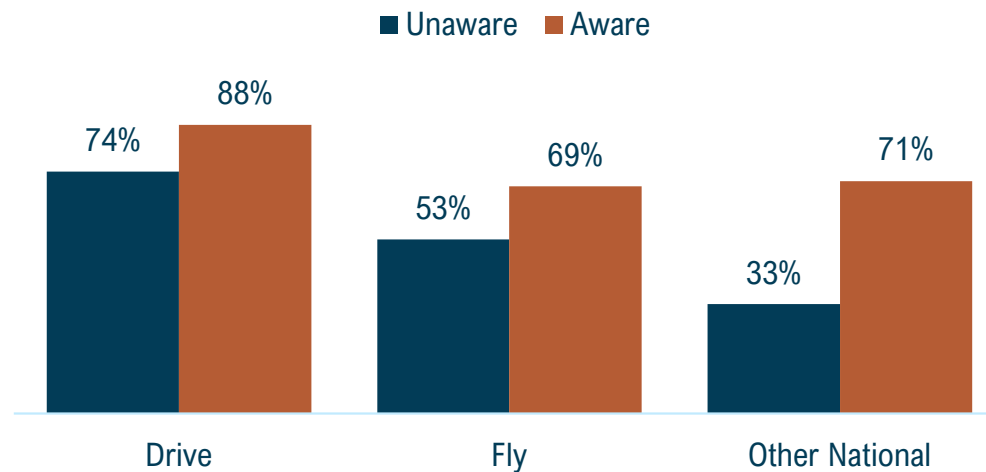
- The creative receives excellent ratings (in the top 10% of ads that SMARInsights has tested) for showing a wide variety of sights and activities in Monterey County and for making travelers more interested in visiting.
- The ads are good at communicating pandemic safety and generating interest in information gathering and the website. It makes sense that these ratings are lower since these three attributes are not the main messages the ads were designed to communicate. However, the ratings are positive because consumers still perceive some of these ideas in the campaign.



Ad Impact on Brand Awareness

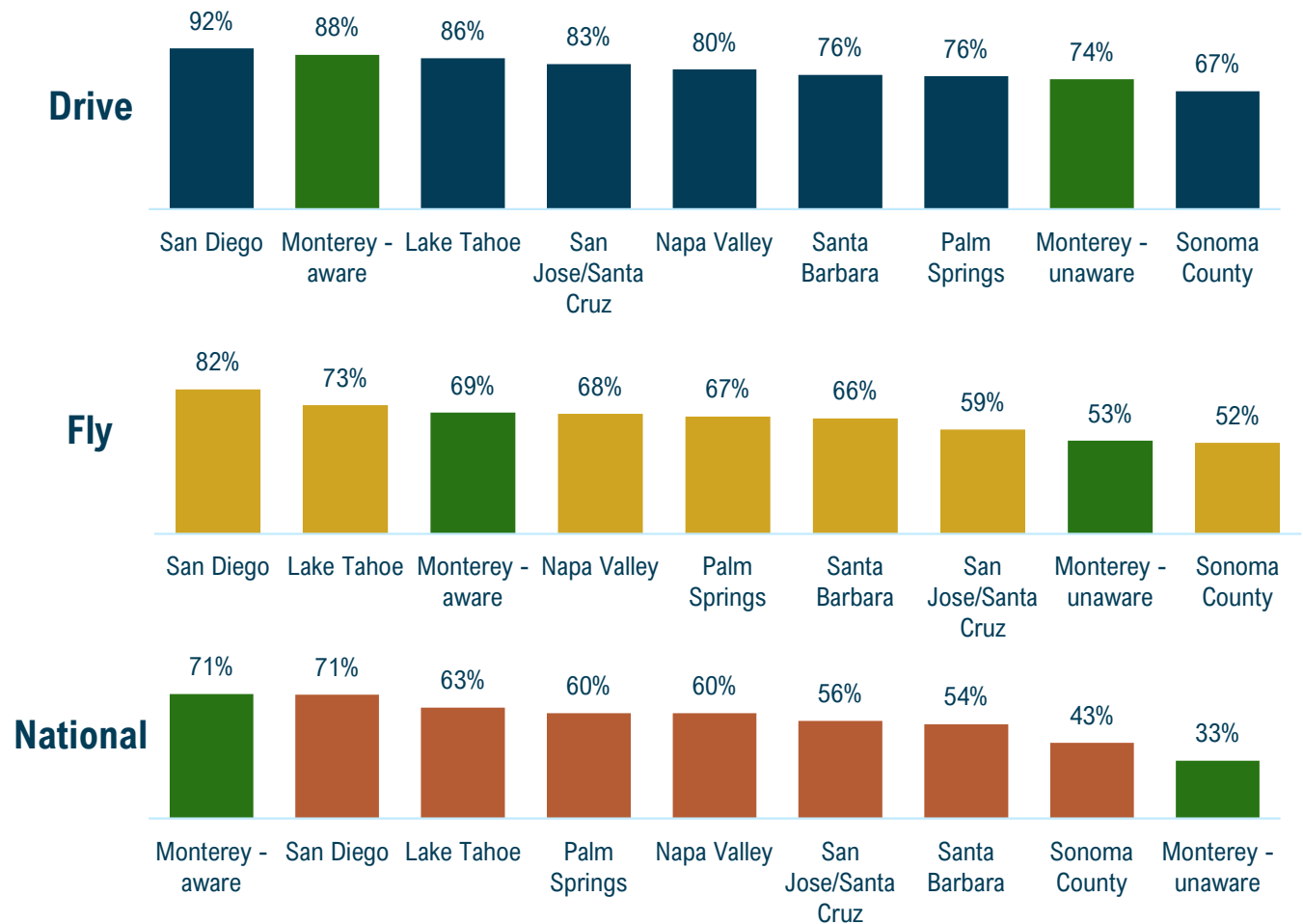
- The ads positively impact Brand Awareness – the share of travelers who are somewhat or very familiar with the Monterey County leisure product – in all three market groups.
- In the more distant markets, where baseline (unaware) brand awareness is lower, the ads have more opportunity to generate familiarity.
- Ad-aware brand awareness in the drive markets at the end of FY20-21 was 84%; in fly markets it was 66%. So the campaigns are building brand awareness over time.

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



Brand Awareness in a Competitive Context

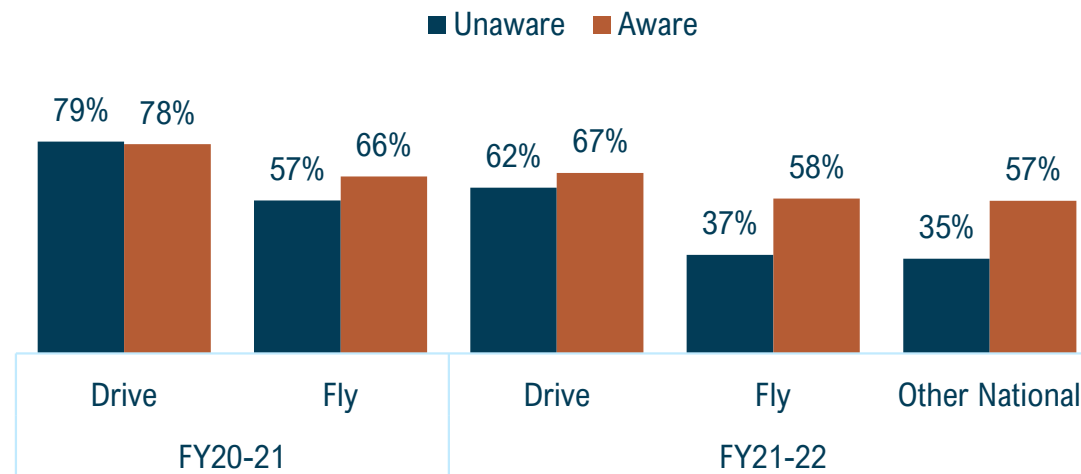
- In all market groups, the marketing lifts Monterey County from being at or near the bottom of the competitive set to at or near the top of the competitive set in terms of Brand Awareness.
- Ad-aware Drive market travelers are only more familiar with San Diego.
- Fly market travelers aware of the ads have higher familiarity with San Diego and Lake Tahoe.
- Ad-aware National market travelers are as aware of Monterey County as they are of San Diego.



Ad Impact on Perceptions of Pandemic Safety

- The ads positively impact perceptions of Monterey County's pandemic safety.
- Among the Drive markets, Monterey County is already seen as the safest destination of the competitive set, even among those unaware of the ads.
- Among Fly and National market travelers, the ads lift Monterey County from the bottom of the competitive set (consistent with low familiarity) to the top in terms of pandemic safety.

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



Ad Impact on Image

- The ads positively impact traveler views of Monterey County's image; specifically scenery, charm, being a good weekend getaway, safe, welcoming, having lots to do, fun and upscale.
- Among the Drive markets, ad-aware travelers also give the destination higher marks for being unique and sustainable.
- Unaware Fly and National Market travelers give Monterey County neutral ratings, consistent with low familiarity. The ads lift perceptions of the county into solidly positive territory.

Monterey County...	Drive		Fly + National	
	Unaware	Aware	Unaware	Aware
Has amazing scenery	4.0	4.4	3.6	4.2
Is a charming place	3.9	4.3	3.6	4.0
Is a good weekend getaway destination	3.8	4.3	3.4	4.1
Is a safe place to visit	3.9	4.3	3.4	3.9
Is a welcoming and friendly place	3.8	4.3	3.5	4.0
Is a place with lots to see and do	3.7	4.2	3.6	4.0
Is fun	3.7	4.2	3.5	4.1
Is an upscale destination	3.8	4.1	3.5	4.0
Is a unique vacation experience you can't get at other places	3.6	4.1	3.3	3.9
Is a sustainable destination	3.5	4.0	3.3	3.8

Ad Impact on Brand Measure

- The marketing boosted MCCVB's Brand Measure to the goal level in the Drive markets.
- The Brand Measure – the average rating of three image attributes with high correlations to likelihood to visit – is a 4.3 among ad-aware Drive market travelers. This is a substantial increase over the measure among unaware travelers.
- The ads also positively impact the Brand Measure among Fly/National market travelers, lifting it nearly half a point.
- This is a positive finding that points to the marketing's impact on consumer perceptions and consideration of the destination.

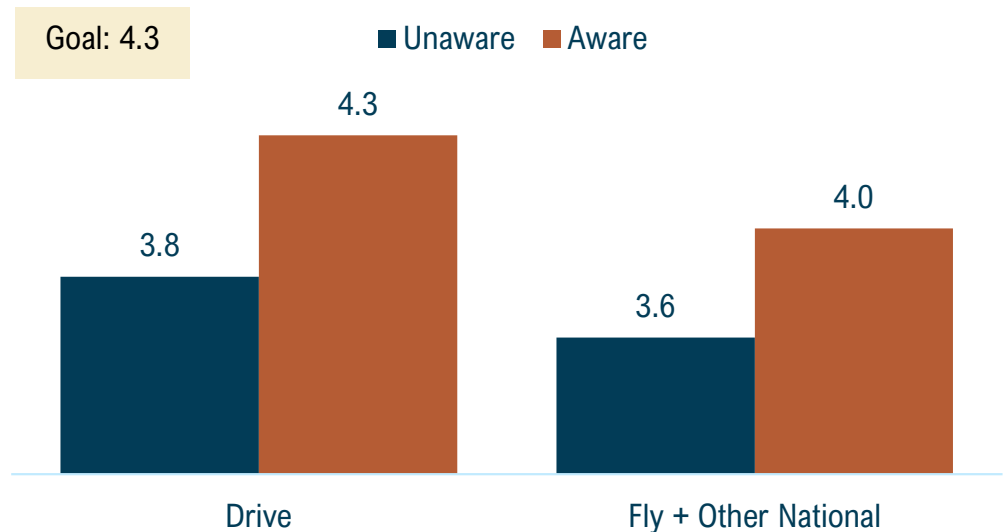
BRAND MEASURE: Monterey County is a ...

Charming place

Good weekend getaway destination

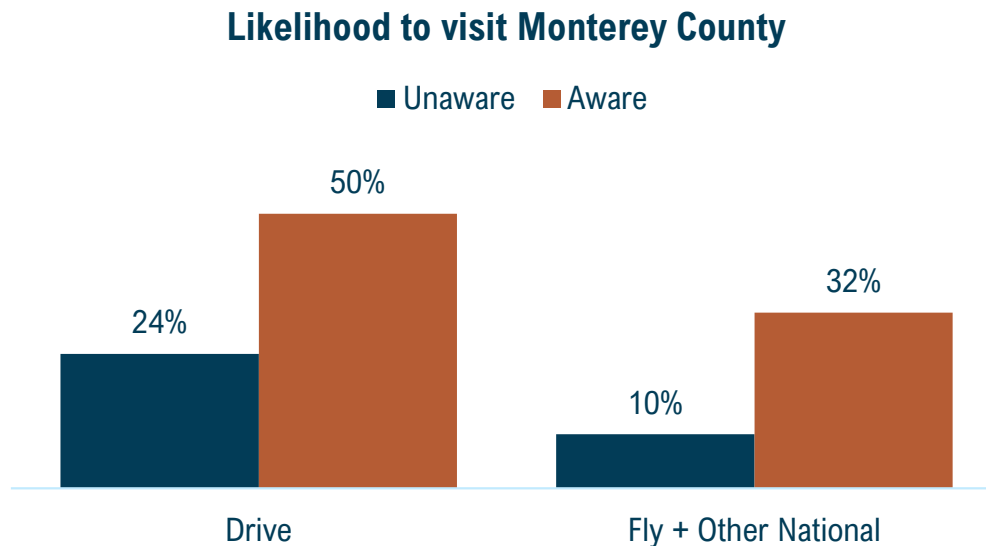
Welcoming and friendly place

Ad impact on Brand Measure



Ad Impact on Likelihood to Visit

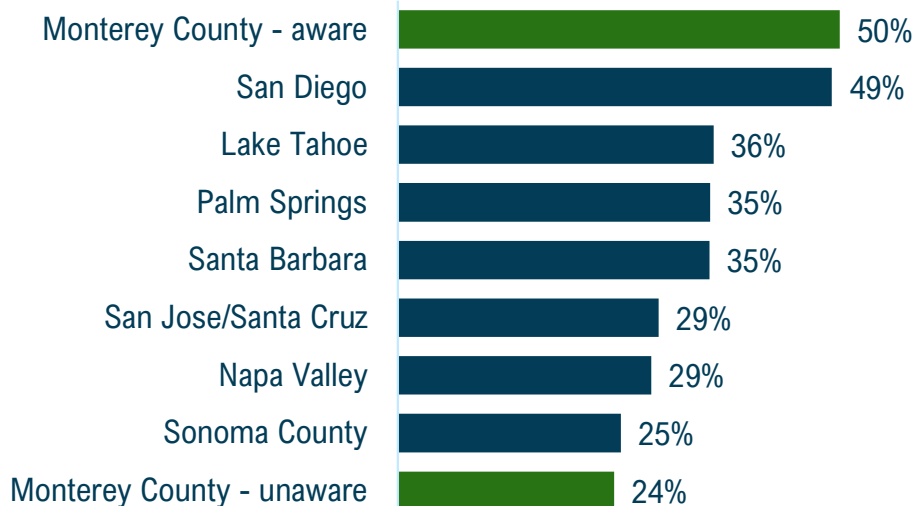
- The marketing doubles likelihood to visit among Drive market travelers, and triples likelihood to visit among Fly/National market travelers.
- Since lack of familiarity is one of the chief barriers to visit consideration and visitation, this suggests that the ads provide enough information to permit consideration of Monterey County.
- At the end of FY20/21, ad-aware visit intent was 44% in the Drive markets and 25% in the Fly markets. While seasonality could be a factor here – with more travelers typically anticipating summer trips than year-end trips – the data also suggest that the marketing is building visit interest over time.



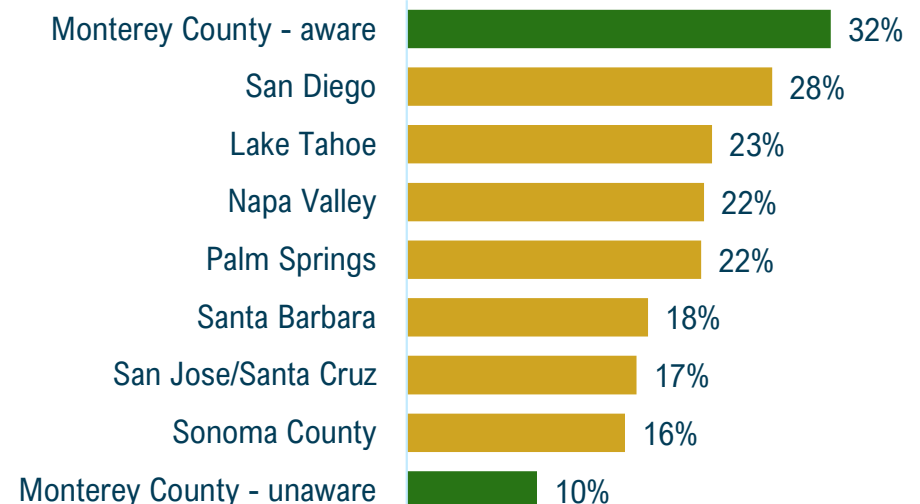
Visit Intent in the Competitive Context

- In the Drive and Fly/National markets, the ads boost Monterey County from having the lowest visit intent in the competitive set to having the highest.
- Leisure travel decisions are not typically made in a directly competitive manner – travelers don't compare destinations side by side and then select *against* one or another. Rather, travelers tend to consider a variety of places for a particular kind of trip, then choose one. So these results mean that MCCVB's marketing provides enough information to make Monterey County a much more compelling destination for a future trip.

Drive Markets



Fly + Other National

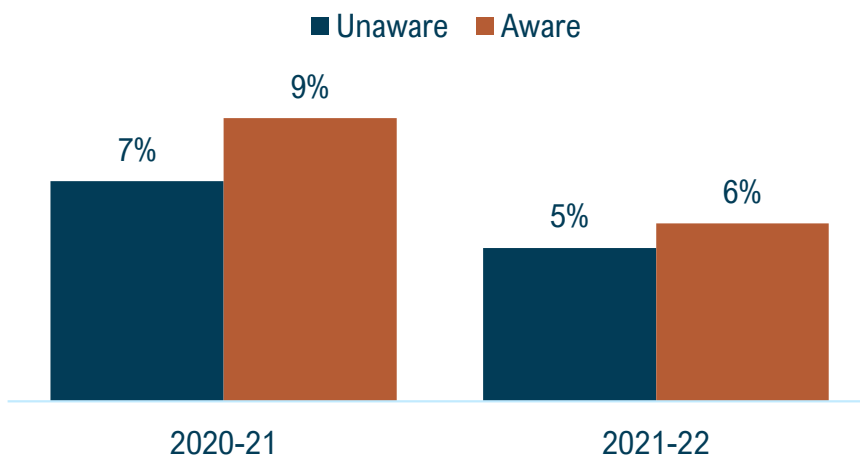


Ad Impact on Visitation

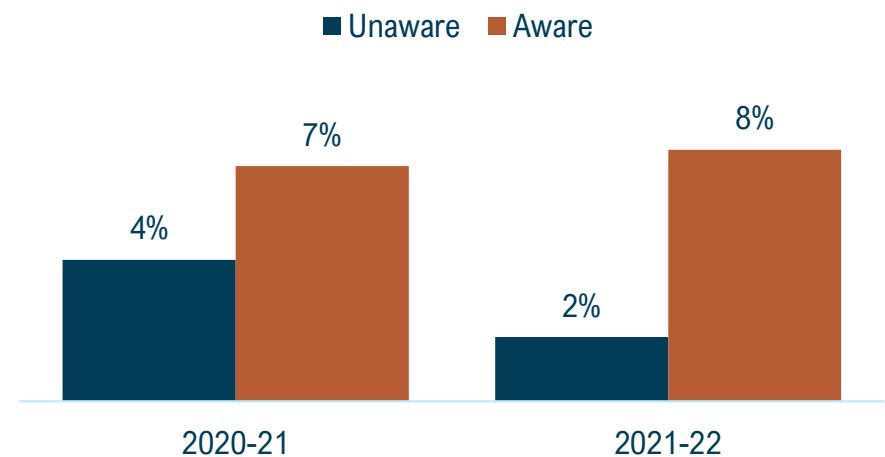
- The marketing positively impacted Monterey County visits from all market groups as well. Qualified visits in Drive and Fly markets are in line with what we measured at FY20-21 year-end. There were no qualified trips from unaware travelers in the National markets, and a 2-point lift here.
- There are several reasons that the impact among the Drive markets is slightly lower. It could be seasonality, or the fact that consumers are more comfortable visiting competitors now. There also may be some impact from the messaging around responsible tourism, which may be slightly less impactful at generating visits in the short term.

Qualified Trips in Monterey County Paid Lodging

Drive Markets Incremental Travel



Fly Markets Incremental Travel



Demographics

- The marketing reached younger travelers at a higher rate than those over age 55. Younger travelers also visited Monterey County at a higher rate than older travelers – which is related to generally lower rates of travel among older travelers during the pandemic.
- Those aware of ads are more likely to have kids at home than the general traveling population. Visitors are even more likely to have kids at home.
- Household income was nearly the same for both marketing aware and all travelers. Visitors are more affluent, reinforcing the higher-value marketing target for the county.

		All Travelers	Marketing Aware	MC Visitors
Age	18-34	33%	44%	47%
	35-54	32%	32%	36%
	55+	36%	24%	18%
HH	Married	50%	48%	49%
	Single/Never married	35%	38%	38%
	Kids in HH	23%	31%	42%
Education	High school or less	15%	17%	10%
	Some college/technical school	24%	18%	18%
	College graduate	39%	42%	44%
	Post-graduate degree	22%	23%	27%
Income	Under \$75K	59%	57%	44%
	\$75K-\$149K	32%	32%	42%
	\$150K+	9%	11%	15%

Trip Spending

- Spending is comparable to pre-pandemic measures in the Drive markets and is higher than at FY20-21 year-end. This suggests a recovery from the pandemic spending lows when attractions and experiences were unavailable.
- Visitors from the more distant markets spent more, which is typical – these tend to be longer trips involving more activities as visitors explore the destination.
- Visit spending per person per night is nearly identical between the Drive and Other National markets. Fly market visits are slightly higher value when viewed this way.

Midyear 2021-22	Drive	Fly	Other National
Lodging/Accommodations	\$450	\$405	\$503
Meals/Food/Groceries	\$237	\$238	\$365
Entertainment/Attractions	\$185	\$177	\$169
Shopping	\$183	\$192	\$192
Entertainment such as shows, theater or concerts	\$73	\$40	\$83
Transportation such as gasoline, auto rental or flight costs	\$131	\$238	\$250
Other	\$50	\$58	\$32
TOTAL	\$1,310	\$1,349	\$1,594
Length of stay	2.8	2.4	3.1
Travel party	3.1	2.8	3.4
Spending per person per night	\$153	\$201	\$155

Return on Investment – Drive Markets

- The ROI in the Drive markets is slightly higher than for FY20-21 year-end.
- Similar spending levels yielded similar reach and impact.
- Meaningful differences between summer 2021 and the current measure are:
 - More travelers have resumed travel (only 5.9 million households were ready to travel in the FY20-21 Year-end measure).
 - Visitors are spending more on their trips.
- These are both positive signs of recovery that create an environment in which MCCVB's marketing has been impactful.

Drive markets	FY20-21	FY21-22
HH	5.9M	9.3M
Awareness	42%	43%
Aware HH	2.5M	4.5M
Incremental travel	2%	1%
Influenced trips	45,857	40,521
Trip spending	\$959	\$1,310
Influenced visitor spending	\$44.0M	\$53.1M
Ad spending	\$711,920	\$745,741
ROI	\$62	\$71

Return on Investment – Fly and Other National Markets

- Ad spending aimed at the Fly markets is considerably lower than FY20-21 year-end spending, and the smaller investment was spread over a much larger geography, since the \$319,000 covered Fly and Other National markets.
- However, awareness in the Fly markets is only marginally lower, and reach in Other National markets was quite strong.
- Likewise, the FY21-22 midyear campaign generated a strong travel increment, netting nearly 200,000 influenced trips for the county.
- Together with the Drive markets, the campaign generated 235,632 influenced trips – equating to 664,520 room nights generated by the marketing. This represents 28% of room demand for the July-December period.
- The results are extremely strong for this period. It is likely that pent-up travel demand in the (perceived) wake of the pandemic – plus sustained advertising throughout the pandemic – contributed to these strong results.

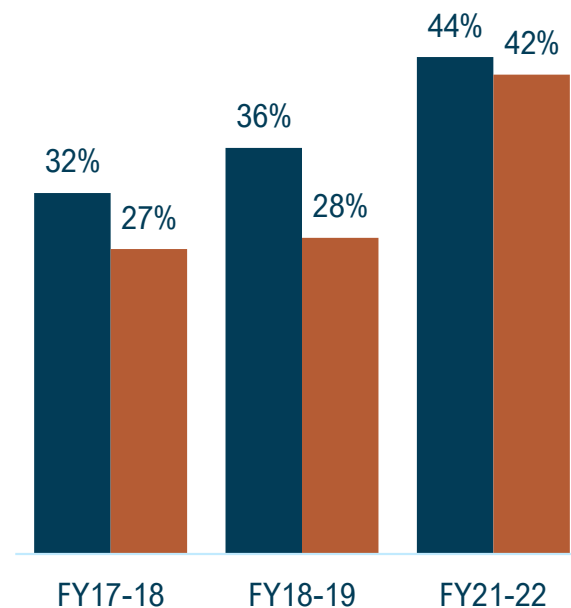
	FY20-21	FY21-22	
	Fly	Fly	Other National
HH	5.3M	5.4M	14.8M
Awareness	33%	29%	38%
Aware HH	1.7M	1.6M	5.6M
Incremental travel	4%	6%	2%
Influenced trips	69,404	93,046	102,064
Trip spending	\$1,337	\$1,349	\$1,594
Influenced visitor spending	\$92.8M	\$125.5M	\$162.7M

Sustainability + Responsible Travel

- Sustainability and responsible travel are becoming more important to consumers.
- As in prior research, we defined a “green traveler” as one who said that any one of these considerations is very important (5 on a 5-point scale) when selecting a place to visit for a leisure trip:
 - Educates future and prospective visitors about how to be more responsible and sustainable travelers in the destination
 - No single-use plastic bags or straws
 - Use of renewable energy
 - Recycling and/or low- or zero-waste mechanisms are in place (composting food scraps, conserving and recycling water)
 - Is a walkable/bikeable community and/or offers reliable public transportation (i.e., free trolley to mitigate traffic)
- In FY18-19, about one-third of travelers say they value sustainability when choosing a destination. In the current measure, 43% are green travelers.
- This is important because a portion of MCCVB's marketing campaign focused on responsible travel.

Share of travelers who are “green”

■ Drive ■ National



Monterey County Image Among Green Travelers

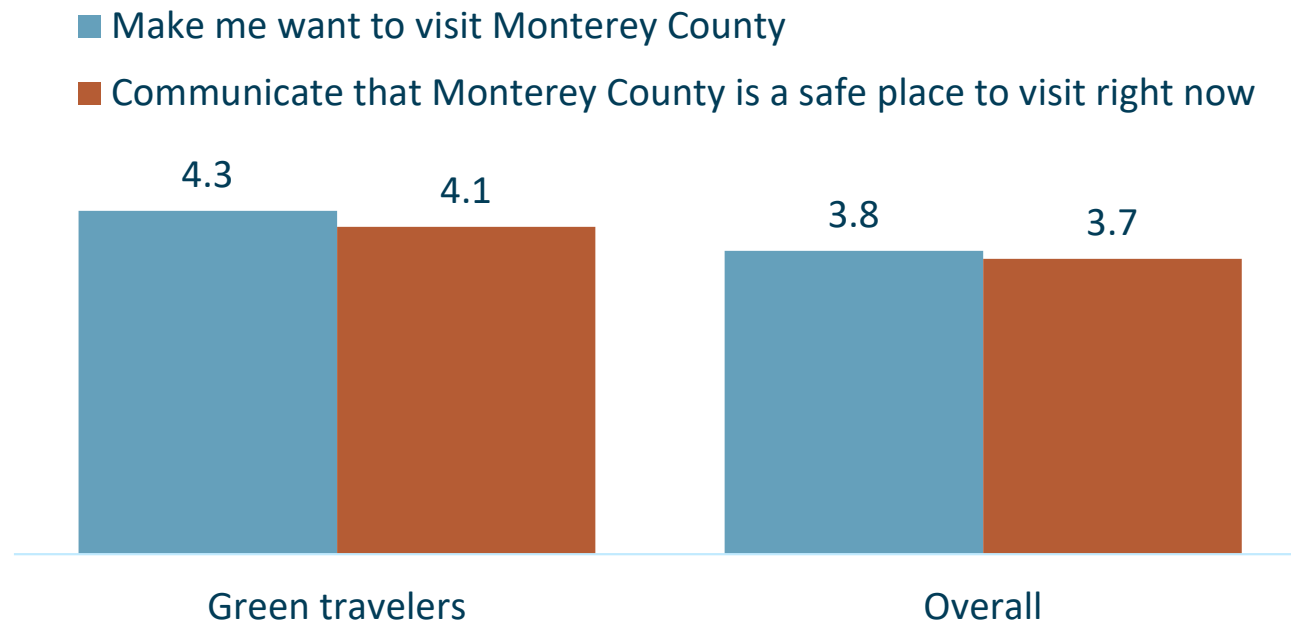
- Across image attributes, green travelers have more positive views of Monterey County than those who do not consider sustainability and responsible travel when choosing a leisure destination.
- However, “Monterey County is a sustainable destination” remains the lowest rated image attribute, indicating that there is more opportunity to inform travelers of these assets.

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

Creative Evaluation Among Green Travelers

- Among travelers for whom sustainability issues and responsible travel are important, ratings for the creative are significantly higher.

These ads and articles...



Questionnaire

FY21-22 Midyear Marketing Impact

Questionnaire

Monterey County CVB
Brand Barometer Research
 Midyear Questionnaire – December 2021

COMPETITIVE SET

Monterey County, which includes a number of towns: Big Sur, Carmel, Monterey and Pebble Beach among others
Sonoma County
Santa Barbara
Palm Springs
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**

The coronavirus/COVID-19 is impacting Americans' lives to varying degrees. However, for this question we are interested in your behavior under normal circumstances. Please indicate if each of the following applies to you.

[ROTATE]	YES	NO
I use video streaming services like Hulu or Netflix.		
I engage in skiing, snowmobiling and/or other outdoor winter activities		
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		
I am currently planning or have already planned an upcoming leisure trip		

What is your age? _____ IF <18 → **TERMINATE**

BRAND CONSIDERATIONS

Q1. If you were thinking about taking a leisure trip to a place in the U.S with rocky coastline, beaches, educational, and culinary experiences, where would you go? _____

Q1A. Please rate how important the following considerations are to you when selecting a place to visit for a leisure trip:

[ROTATE]	1 – Not at all important	2	3	4	5 – Very important
Educates future and prospective visitors about how to be more responsible and sustainable travelers in the destination					
No single-use plastic bags or straws					

Use of renewable energy					
Recycling and/or low- or zero-waste mechanisms are in place (composting food scraps, conserving and recycling water)					
Is a walkable/bikeable community and/or offers reliable public transportation (ex: free trolley to mitigate traffic)					

Q2. 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]			

Q3. How likely are you to take a leisure trip to any of the following places in the next year?

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

Q4. How likely are you to recommend each of the following places to your friends or family as a destination to visit for a leisure trip?

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

[ROTATE]	Q5A. Please select the areas that you have visited for a leisure trip in the past 2 years (day trip or overnight trip).	Q5B. How many trips have you taken to this area in the past 2 years?
Big Sur		
Carmel		
Lake Tahoe		
Marina		
Monterey		
Moss Landing		
Pacific Grove		
Palm Springs		
Pebble Beach		
Salinas		
San Francisco		
San Diego		
Santa Barbara		
Seaside		
Sonoma/Napa Valley		
None of these (exclusive)		

Questionnaire

[VISITOR = BIG SUR, CARMEL, MARINA, MONTEREY, MOSS LANDING, PEBBLE BEACH, PACIFIC GROVE, SALINAS OR SEASIDE AT Q5B]

Q6. For each statement, please rate how much you agree or disagree that the statement describes Monterey County.

[ROTATE]	Strongly disagree				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
Is a sustainable destination	1	2	3	4	5
Is a safe place to visit	1	2	3	4	5

Q7. 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
Eco-friendly and sustainable
Masks required indoors
Social distancing enforced

TRIP SPECIFICS [ASK THIS SECTION IF Q5B = BIG SUR, CARMEL, MARINA, MONTEREY, MOSS LANDING, PEBBLE BEACH, PACIFIC GROVE, SALINAS OR SEASIDE]

Q8. You indicated that you visited [MONTEREY TOWNS FROM Q5], which are/is in Monterey County. During what month(s) did you visit Monterey County? [SHOW MONTHS FROM JANUARY 2021 TO MONTH OF FIELDING AND Before 2021 option]

Q9. Was your [EARLIEST MONTH/YEAR] trip your first time visiting Monterey County for leisure? Yes/No

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Q9A. 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 OF PRIMARY] Monterey trip.

Q9_1. 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

Q9_2. Was your MONTH YEAR trip...?

- An overnight trip
- A day trip

ASK Q9_3 AND _4 IF Q9_2 = OVERNIGHT TRIP

Q9_4. How many nights did you spend in Monterey County during this MONTH YEAR trip?

Q9_5. 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
- Homeshaing/vacation rental i.e. booked through Airbnb, Homeaway, etc.
- Other, please specify _____

Q9_6. Which of the following did you do as a part of your MONTH YEAR trip? [ROTATE]

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

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Monterey Bay tour	
Visiting a spa	
Tours, attractions or concerts	
Outdoor adventure activities	
Hiking, biking, or kayaking	
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:

Q9_6a. 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.

Q9_7. Including you, how many people were on this MONTH YEAR trip? _____

Q9_7a. [ASK IF Q9_7>1] How many were younger than 18? _____

Q9_8. 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 _____

Q9_9. Thinking about this MONTH YEAR trip, how far in advance did you begin to plan?

- Less than one week
- One to two weeks
- Two to three weeks
- Three to four weeks
- One to two months
- Three to four months
- More than four months in advance
- Don't know

Q10. Which of these describe(s) your [MONTH YEAR] Monterey County trip? *Select all that apply.*

- Work-related
- Visited friends or relatives in Monterey County
- Couples getaway
- Friends getaway
- Family trip
- Solo trip
- Other, specify _____

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Q10A. 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 TRIP]. 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 _____

Q11. Thinking about your overall travel experience in Monterey County, would you say it was...?

- Poor
- Fair
- Good
- Very good
- Excellent

Q19. How safe do each of these destinations feel to you given the coronavirus?

[ROTATE]	Very risky	Somewhat risky	Uncertain	Safe	Totally safe
[INSERT COMPETITIVE SET]					

ADVERTISING SECTION [ADS ARE NEW]

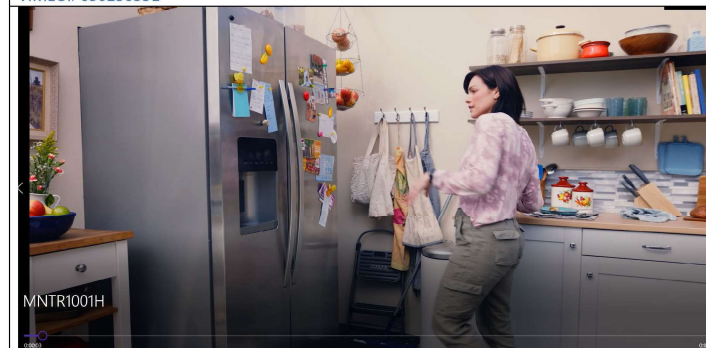
I:\Ads Master\Monterey\2021-22 Midyear Marketing Impact

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]

VIDEO

MNTR1001H.mp4

VIMEO# 656256331



Video1. Have you seen this video ad before? YES/NO

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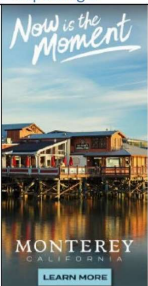

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Questionnaire

Video2. How much do you agree that these ads make you want to visit Monterey County?

Strongly disagree	1	2	3	4	Strongly agree	5
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Video3. What did you like/dislike about this video? _____



DIGITAL ADS	
Display1 	Display2 
Prospecting 1 	Prospecting 2 
Prospecting 3 	Prospecting 4 

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Digital1. [SHOW ADS IN GRID WITH YES/NO BY EACH] Please indicate if you have seen this digital ad before now.

Digital2. How much do you agree that this ad makes you want to visit Monterey County?

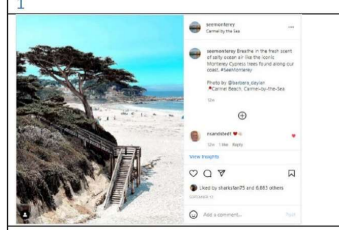
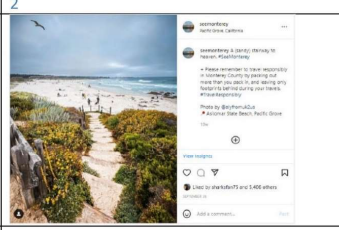
Strongly disagree	1	2	3	4	Strongly agree	5
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PRINT	
Calvisitor 	Monterey SF 

Print1. Have you seen this print ad before now? YES/NO




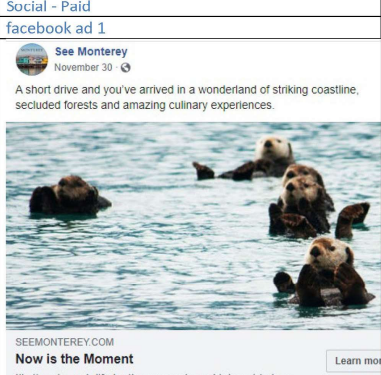
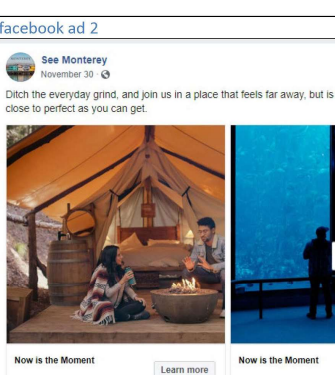
Print2. How much do you agree that this ad makes you want to visit Monterey County?

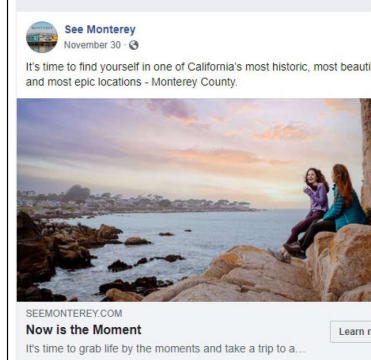
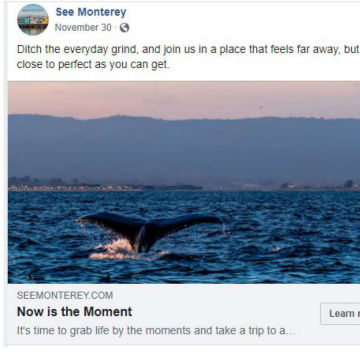
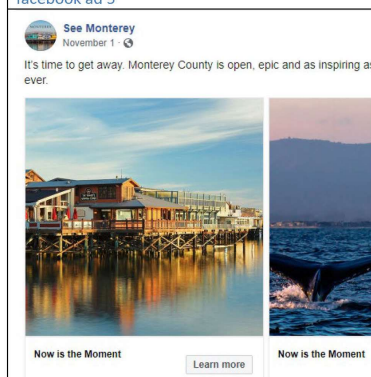

Strongly disagree	1	2	3	4	Strongly agree	5
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Social - Owned	
1 	2 

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3	4
	
5	
	
Social - Paid	
facebook ad 1	facebook ad 2
	

facebook ad 3	facebook ad 4
	
facebook ad 5	facebook ad 6
	

Social1. [SHOW ADS IN GRID WITH YES/NO BY EACH] Please indicate if you have seen each of these social media posts before now.

Yes
No

Social2. [ASK AFTER FACEBOOK GROUP AND AFTER INSTAGRAM GROUP] How much do you agree that these social media posts make you want to visit Monterey County?

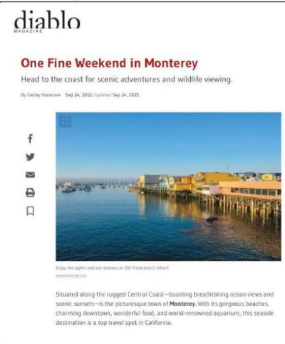



Strongly disagree	1	2	3	4	Strongly agree	5
-------------------	---	---	---	---	----------------	---



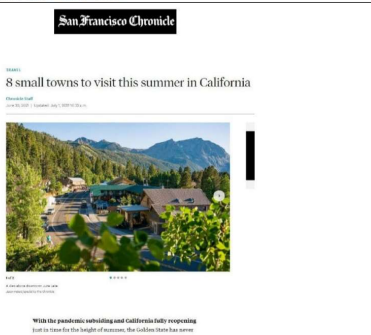
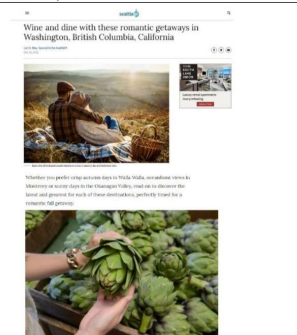


Questionnaire

PUBLIC RELATIONS

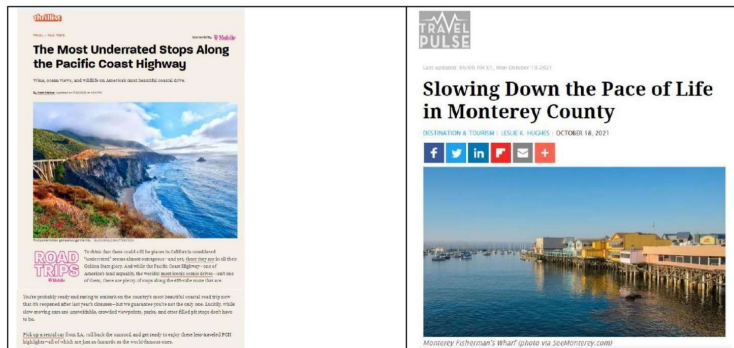
PR1. In the last year do you recall seeing or hearing any news stories, articles or feature stories about Monterey County, including Monterey, Carmel, Pebble Beach, Big Sur or other parts of Monterey County?

Yes
No

PR PIECES	
<p>Diablo mag</p>  <p>One Fine Weekend in Monterey Head to the coast for scenic adventures and wildlife viewing. By Emily Henderson Sep 26, 2020 (updated Sep 26, 2020)</p>	<p>Hansford sentinel</p>  <p>THE SENTINEL Top 5 things to do in Monterey County this fall By Emily Henderson Sep 26, 2020 (updated Sep 26, 2020)</p>
<p>Hemispheres</p>  <p>Pacific Coast Pilgrimage A road trip on California's coast is the most scenic drive in the state. Here's how to make the most of it. By Emily Henderson Sep 26, 2020 (updated Sep 26, 2020)</p>	<p>Koa</p>  <p>A FOODIE'S GUIDE TO MONTEREY COUNTY, CALIFORNIA By Emily Henderson Sep 26, 2020 (updated Sep 26, 2020)</p>

Men's journal	Modern luxury silicon valley
<p>MENS JOURNAL</p>  <p>These Epic Guys' Trips Will Send Your Boys Packing By Emily Henderson Sep 26, 2020 (updated Sep 26, 2020)</p>	<p>SiliconValley</p>  <p>NOW IS THE TIME TO TAKE AN INSPIRED TRIP TO MONTEREY COUNTY, CALIFORNIA By Emily Henderson Sep 26, 2020 (updated Sep 26, 2020)</p>
<p>San fran chronicle</p>  <p>8 small towns to visit this summer in California By Emily Henderson Sep 26, 2020 (updated Sep 26, 2020)</p>	<p>Seattle pi</p>  <p>Wine and dine with these romantic getaways in Washington, British Columbia, California By Emily Henderson Sep 26, 2020 (updated Sep 26, 2020)</p>
<p>Thrillist</p>  <p>With the pandemic subsiding and California fully reopening By Emily Henderson Sep 26, 2020 (updated Sep 26, 2020)</p>	<p>travelpulse</p>  <p>Wine and dine with these romantic getaways in Washington, British Columbia, California By Emily Henderson Sep 26, 2020 (updated Sep 26, 2020)</p>

Questionnaire

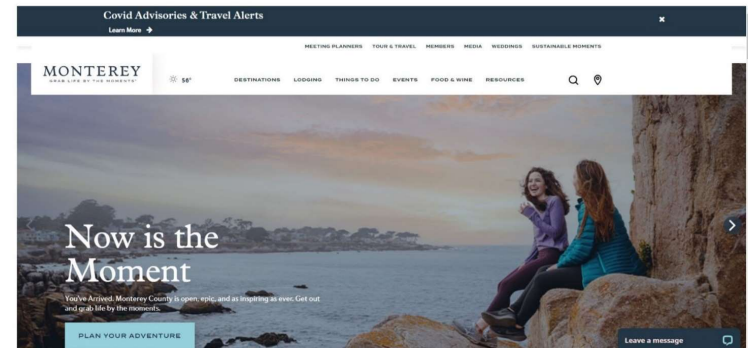


PR2. [ASK EVEN IF PR1 IS NO] Please indicate if you have seen each of these articles and posts about Monterey County recently. YES/NO [SHOW ADS IN GRID WITH YES/NO BY EACH] [ROTATE]

GRID. Now please think about the ads and articles you just saw and indicate how much you agree that these ads and articles...

ROTATE	Strongly disagree				Strongly agree
Make me more interested in visiting Monterey County	1	2	3	4	5
Make me want to get more information on Monterey County	1	2	3	4	5
Show that there is a wide variety of sights and activities in Monterey County	1	2	3	4	5
Portray Monterey County as a desirable destination	1	2	3	4	5
Portray Monterey County as a nearby destination	1	2	3	4	5
Make me want to go to the website and learn more about the destination and the packages/deals offered	1	2	3	4	5
Make me want to visit Monterey County	1	2	3	4	5
Communicate that Monterey County is a safe place to visit right now	1	2	3	4	5

Q22. Have you visited the website for the Monterey County Convention & Visitors Bureau www.seemonterey.com? YES/NO



I:\Questionnaires\Monterey\Monterey recovery 2020-21\ 2021website.jpg
DEMOGRAPHICS

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

D1. Are you currently...?

- 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?

- High school or less
- Some college/technical school
- College graduate
- Post graduate degree

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

Questionnaire

D6. Which of the following best describes your ethnic heritage? Select all that apply. [ALLOW MULTI]

Caucasian/White
African-American/Black
Asian
American Indian or Alaska Native
Native Hawaiian or Other Pacific Islander
Other, please specify _____

D6A. ethnicity 2. Do you identify as Hispanic or Latino? YES/NO

D7. Do you identify as LGBTQ?

Yes
No
Prefer not to answer

D8. Do you identify as...?

Male
Female
Non-binary
Prefer not to answer

D9. Have you received the COVID-19 vaccine?

Yes
No, but I am planning to
No, and I am not going to