

BUILDING A FUTURE FOR THE OCEAN



The Year in Review

Monterey County boasts superb natural beauty and many inspiring, charming and historical places to visit. People have long been drawn to our area as one of the world's top vacation spots.

But our community faced serious challenges in 2017. According to the Aquarium's market research, we saw a drop in visitation due to the combined impacts of landslides south of Big Sur, fires in Los Angeles, Napa and Sonoma counties and the delayed opening of the Monterey Conference Center.

We overcame those challenges, thanks to a larger community effort to promote how this area still had plenty to offer not only to its visitors, but also its residents. The Aquarium was proud to be part of that collaborative strategy and share in its success. We exceeded our attendance projections with a total of 1.9 million visitors, and celebrated achievements in other areas:

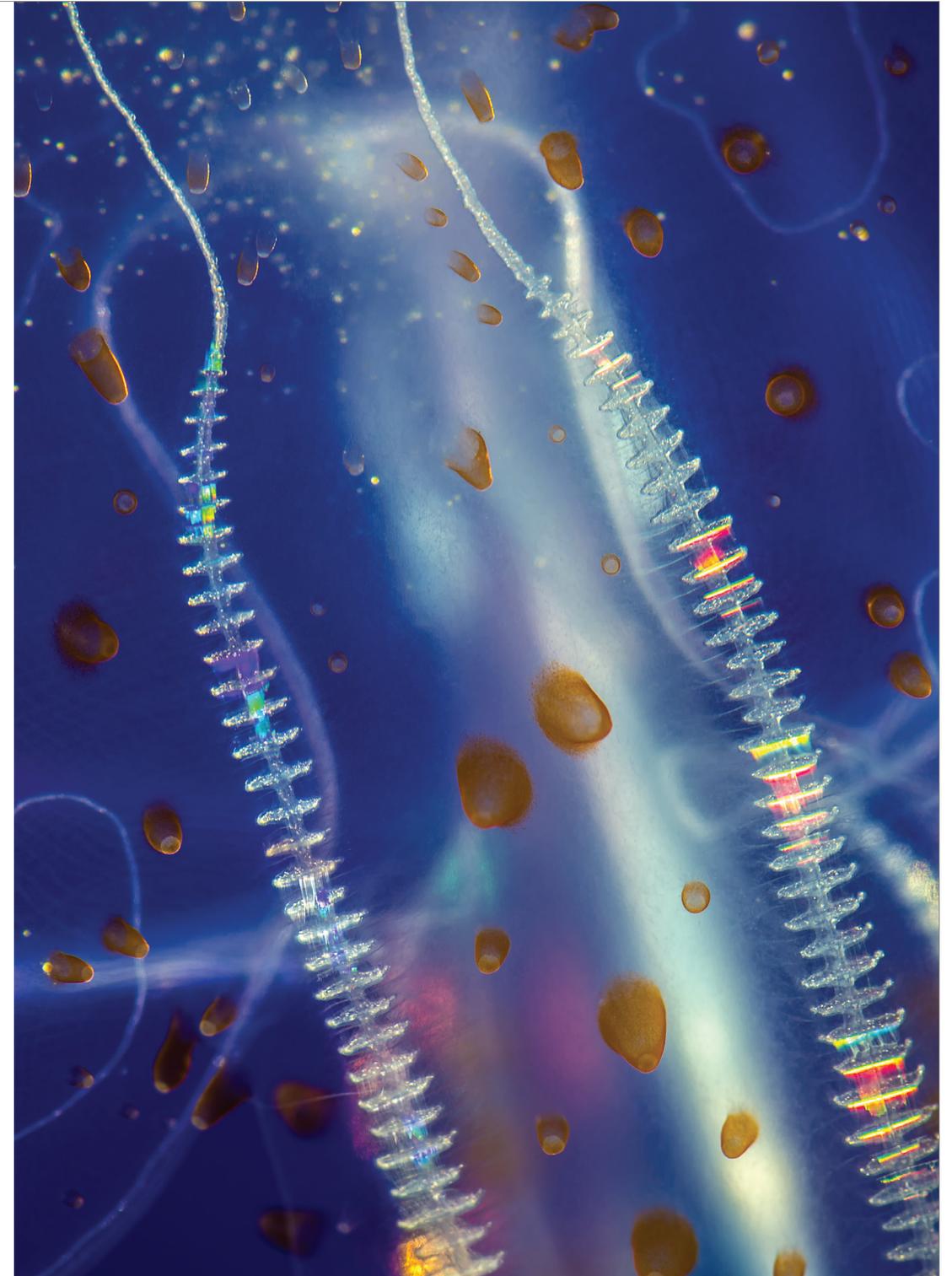
- Our years of work to protect Pacific bluefin tuna paid off when the international community agreed—for the first time—to recover the population of these iconic fish.

THE YEAR IN REVIEW

- The World Association of Zoos and Aquariums presented us with its Conservation Award for the international scope of our work to safeguard the ocean.
- We helped create a coalition of 22 U.S. aquariums to raise public awareness of the threats of plastic pollution in freshwater and ocean habitats. We also eliminated all single-use plastic items, such as straws and drink containers, from our cafe and culinary operations.
- We began the expansion of our Animal Care Center to meet the growing needs of ocean animals at the Aquarium and in the wild.
- We became the first in the world to culture and raise the stunning and exceedingly delicate spotted comb jelly. We also hatched and are raising chambered nautilus, becoming one of only a handful of aquariums to propagate this living fossil.

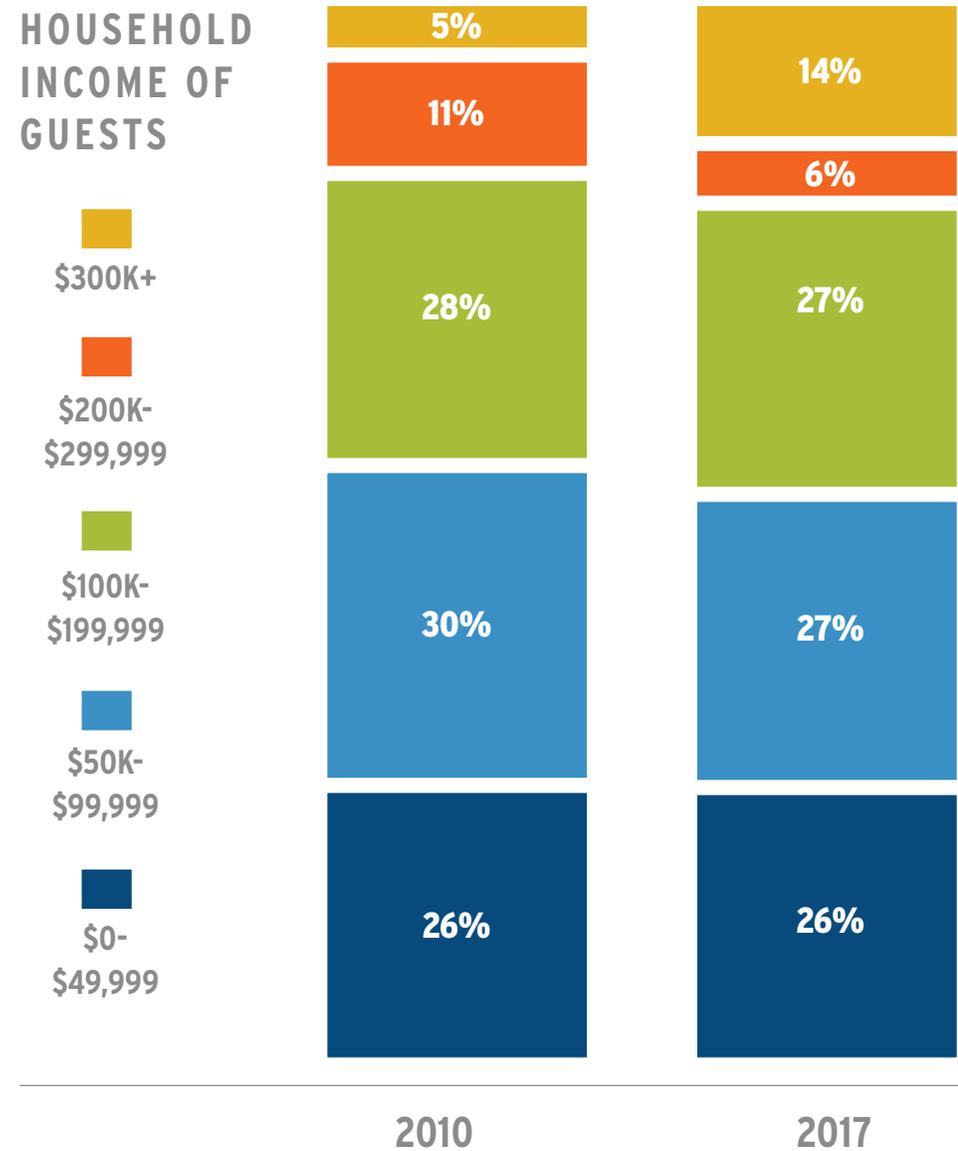
We're proud to report on these achievements and the many ways we're working together with our community to thrive. Here are key facts and trends from our 2017 market research data and social media metrics we hope you'll find useful.

Thank you to our local partners that make so much of what we do possible.



Demographics, Attendance & Visitation

We've seen significant growth since 2010 in attendance by visitors with incomes over \$300,000, while maintaining steady attendance by visitors with incomes of \$50,000 or less. Each year, through robust affordable access programs, the Aquarium offers free admission to more than 90,000 people who wouldn't otherwise be able to afford to visit.





63%

Adults traveling
without children



37%

Adults traveling
with children

We're
successfully
attracting
Millennials

More than
53%
of visitors were
between the ages
of 18 and 34

Where are they coming from?

6%

Monterey County

29%

San Francisco Bay Area

31%

Other California

34%

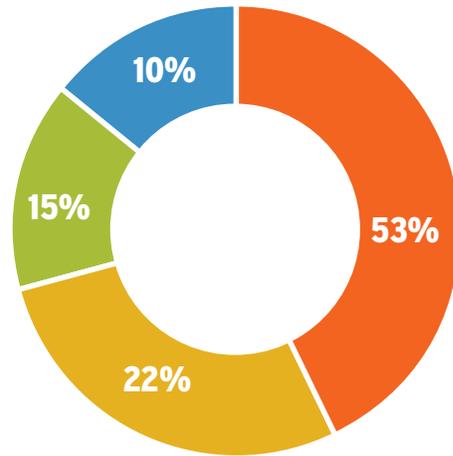
Other United States

Percent of adult visitors to
the Monterey Bay Aquarium

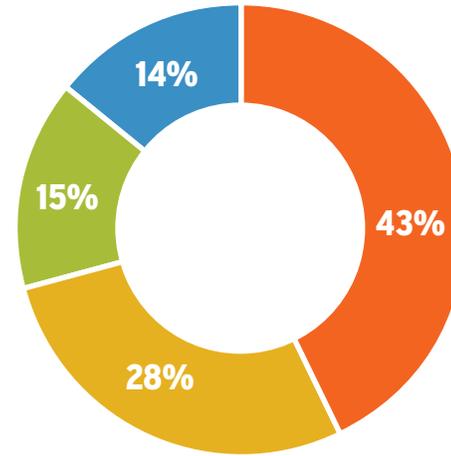


Hispanic Visitation and Economic Impact

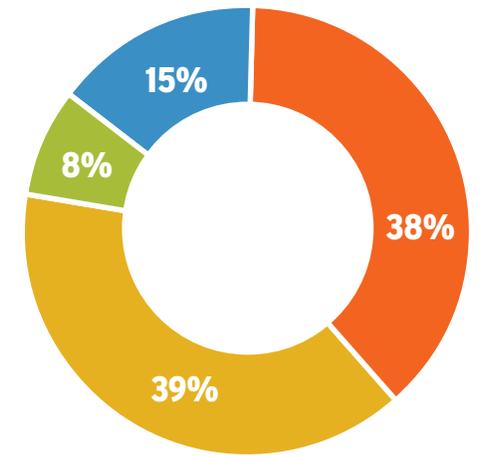
We continue to successfully attract a diverse audience and are making progress toward our goal of mirroring the state of California's ethnic makeup.



ALL ADULT GUESTS



ADULT CALIFORNIA GUESTS



CALIFORNIA'S ETHNIC MAKEUP

■ White non-Hispanic
 ■ Hispanic
 ■ Other
 ■ Asian



37%

of Hispanic visitors spent at least one night in a Monterey-area hotel

76K

is the total estimated room nights for Hispanic visitors

Guest Satisfaction

The Aquarium usually scores high on guest satisfaction surveys. Our data suggest that visitors to the Aquarium experience a significantly higher (nearly double) number of unscheduled interactions with staff and volunteers than do visitors to other U.S. aquariums. Visitors tend to rate places where they have “personal facilitated experiences” higher in perceived value and satisfaction, and say they contribute to a more meaningful overall experience.



Our national, digital search-based advertising campaign* achieved these results in Monterey County:

271K

room nights

\$63 million

spent on lodging

\$30 million

spent on retail

\$33 million

spent on food and beverage

\$126 million

overall tourism dollars

\$12 million

in tax revenues (sales tax and TOT)

*Launched in 2011; runs year-round.

Social Media Metrics and Trends

We're incredibly lucky to be able to tell great visual stories that make people happy. Across all social media platforms, posts about Monterey Bay, from wildlife to the weather, are consistently among our most popular. We've shown sunsets, king tides and sea otters off our ocean-view decks, tide pools at Point Lobos and elephant seals at Año Nuevo.

Posts that create a strong sense of place connect with people's emotions, sparking terrific engagement with those who've visited the area as well as those who hope to visit. Live streams in particular give viewers a unique sense of stepping into this very special place.



4x

as many consumers would rather watch a video about a product than read about it



3x

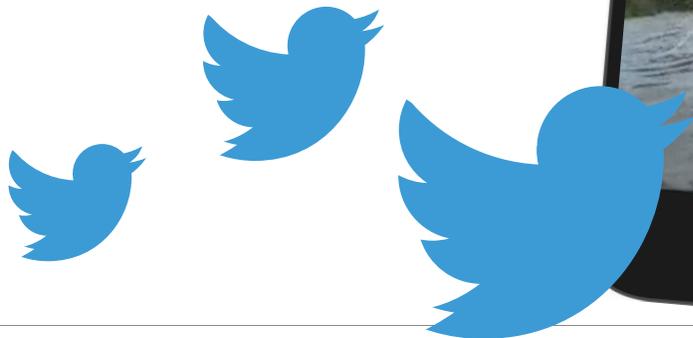
as many people watch Facebook Live videos than videos that aren't live

10x

as many comments are submitted to Facebook Live content than pre-recorded video content

Collaborate When You Can!

We had a number of successful collaborations with other zoos and aquariums on Twitter in 2017. Working with a group of similar businesses to come up with a fun hashtag like #CuteAnimalTweetOff allows everyone who participates to highlight their own particular content (such as cute otters) and builds relationships between organizations. We also regularly jumped onto trending Twitter tags (#GroundhogDay or #IStayPositiveBy). It's a great way to give your brand visibility with new audiences.



Live Streaming Continues to Grow

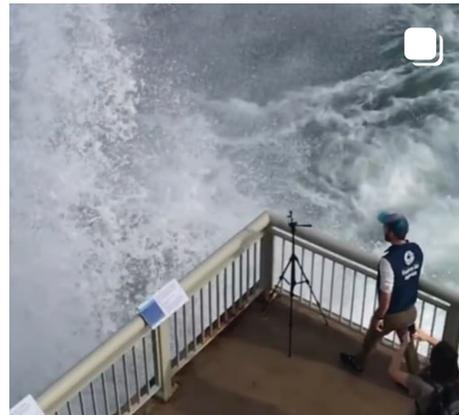
Live streams on Facebook, Periscope and Instagram became an important part of our content mix in 2017 and are a wonderful tool for increasing both reach and engagement. These broadcasts are extremely flexible—we use them to tell stories about the destination (such as tidepooling at Point Lobos) as well as stories specific to the Aquarium (baby abalone on exhibit).

Live streams provide a sense of immediacy, excitement and a much-valued “insider view.” They also enhance connections with our followers in an extremely tangible way. We regularly get comments from people all over the world during these streams, and due to the real-time nature of the broadcasts, we can connect directly by answering questions and acknowledging people who have joined the streams.

And finally, live streams can be done by one person with a phone anywhere you have connectivity, which is great when filming and editing video isn't affordable or practical.

Instagram Is a Powerful Way to Connect

Over the past year, we increased our Instagram content and decreased our Snapchat content based on how we've seen these platforms perform for us. We focused on Instagram Stories in particular, which gives us a new way to tell stories in an in-depth, yet lighthearted way. Instagram Stories has increased the average amount of time spent on this platform to 28 minutes. We also repost user-generated content regularly—sometimes as often as daily. Reposting is a great way to build community and add a broader variety of images and moods to our feed.



Industry data says that

59%

of 18- to 29-year-olds use Instagram

51%

of Instagram users access the platform daily, and 35% view it several times per day

Instagram Stories led to a 15 to 40% decline in Snapchat Stories



Social Care Is Crucial

The top choice for a customer care channel is social media. Responding to comments and questions in our feeds (what we call “social care”) has become increasingly important, and helps build connection and good will with our followers. More and more, people reach out to the Aquarium through social media rather than by phone or email, and we’re committed to providing a strong customer care experience. We also regularly receive media requests through social media direct messages.

The Aquarium responds within
2 hours
to most messages to our
social media platforms

Industry data says that
10 hours
is the average time
a brand takes to reply

4 hours
is the average time a user
will wait for a response

89%
of messages to brands
go ignored

Hispanic Social Media Trends

We launched our Spanish-language Facebook page in 2011 to engage the growing Hispanic audience in California. We now have more than 100,000 followers on this platform, and have started a Spanish-language Instagram account as well.

With these channels, we’re able to provide content tailored to the specific interests and preferences of our Hispanic audience, helping them stay connected to the Aquarium, learn more and take action for a healthy ocean.



Community Impacts at a Glance

Education for schoolchildren remains a top priority for the Aquarium. Since we opened in 1984, we have provided free visits to more than 2.5 million students. On average, 79,000 students participate in field trips each year—30 percent from Monterey, Santa Cruz and San Benito counties.

We began construction on our Bechtel Family Center for Ocean Education and Leadership and are on track to welcome students in 2019. The new Center will allow us to provide in-depth programs to every visiting school group, double the number of teens participating in multi-year leadership training programs, and double the number of teachers receiving professional development—all free of charge.



We hosted
25
interns from
Hartnell College
and California State
University,
Monterey Bay

Recognizing the shift in demographics in California, in 2003 the Aquarium began welcoming Hispanic audiences by holding cultural events. Since then, Hispanic audiences have rated their overall satisfaction, educational experience and level of inspiration higher than non-Hispanic audiences. Our goal is to successfully introduce this audience to our mission and the overall Aquarium experience, and cultivate them to become repeat visitors not only to the Aquarium but also the destination.



113,913

students, teachers and chaperones
visited on free field trips



36%

of our staff
use alternative
transportation
to get to work

We employ
550
people, with
a payroll of
\$37 million



We admitted
93K

low-income Californians to the
Aquarium free of charge

2,036

teachers participated in our professional
development programs; 32% were from
Monterey, Santa Cruz and San Benito counties

Supporting Local, Sustainable Fisheries

With help from \$40,000 in Aquarium funding, the Monterey Bay Fisheries Trust launched its new “Fish Hub” program. The full-time supply chain manager is rebuilding market demand for local fish while ensuring that restaurants, markets and consumers in the Monterey Bay region have access to fresh, local, sustainable and traceable seafood.



Groundbreaking Education Program Turns 10

We celebrated the 10th anniversary of the most innovative teen education program in our history. The Watsonville Area Teens Conserving Habitats (WATCH) connects high school students with local wetlands habitats and their importance to a healthy ocean. We also provide scholarships to WATCH participants—\$207,000 to date—so they can continue to study science in college.

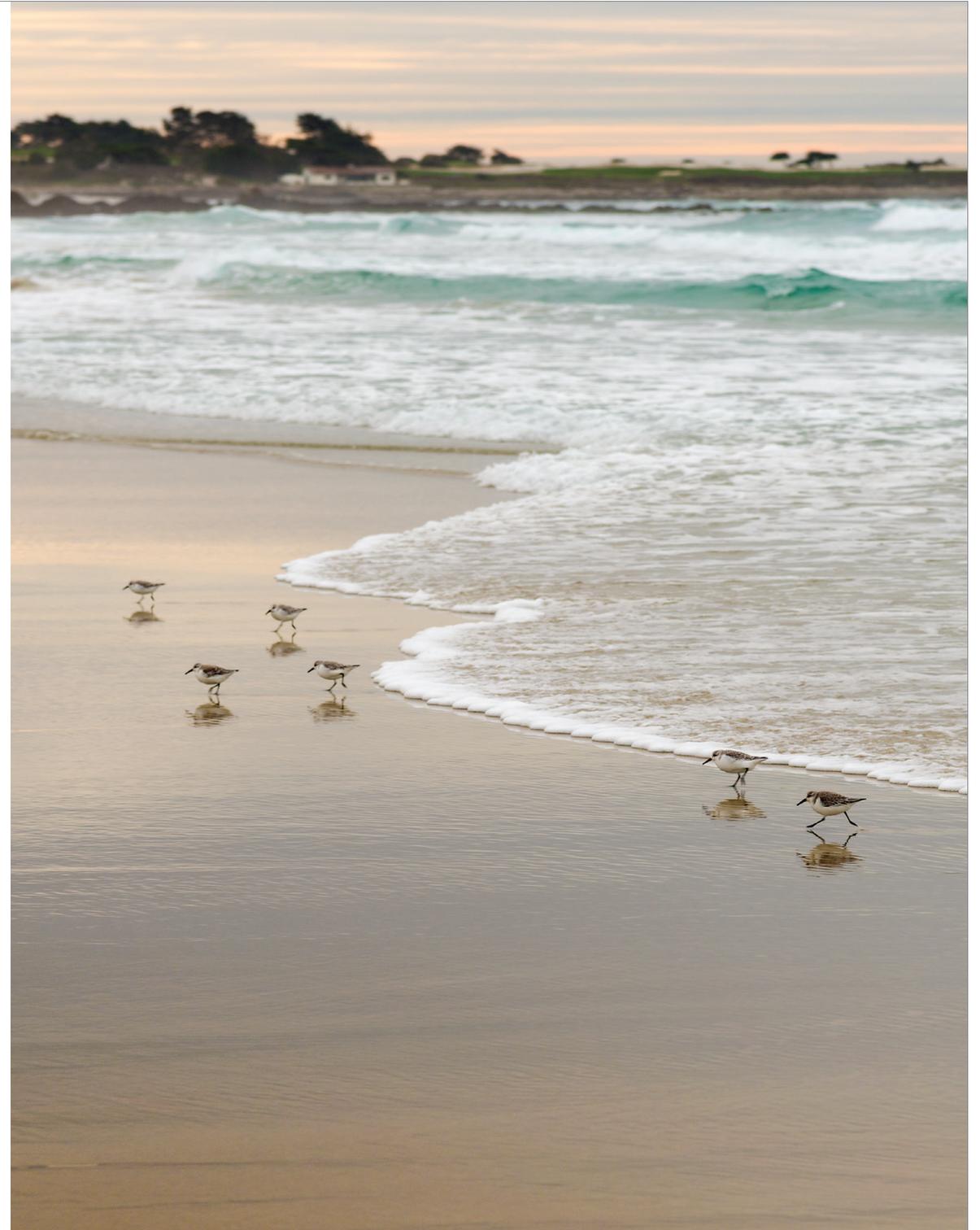
Funding Local Conservation Projects

Aquarium employees, in partnership with employees from the Monterey Bay Aquarium Research Institute, make voluntary payroll donations to the Employee Conservation Action Fund, which supports local conservation projects focused on native species and terrestrial habitats that benefit our regional watersheds. In 2017, we granted about \$13,000 to six projects.

Celebrating the Sanctuary's 25th Anniversary

When the Aquarium began, we opened a window into the rich and diverse life of Monterey Bay. That awareness reached millions and sparked a movement that led to the creation in 1992 of Monterey Bay National Marine Sanctuary. Now, 25 years later, the bay is an international success story—a vibrant example of what can happen when we responsibly manage and protect our living ocean. We'll continue to defend our blue parks, and support policies that protect coastal communities such as ours from the unacceptable risks of offshore oil and gas development.

When the federal government proposed opening marine sanctuaries to offshore oil drilling, the Aquarium initiated and signed letters in support of their protection, including a letter from 21 Monterey Peninsula businesses; a second from over 20 of our California restaurant, chef and culinary business partners; and a third from over 50 U.S. aquariums and zoos.



For More Information

The Monterey Bay Aquarium conducts ongoing market research to better understand how we can improve the experience for our visitors, to inform our marketing and communications strategies, and to identify the Aquarium's economic and social contributions to the region.

We are happy to share our audience research data with our partners in the hospitality industry, and the community at large.

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