

MONTEREY COUNTY CVB Ad & Communications Research

FY14/15 Mid-Term Research

December 2014

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Background & Objectives

The Monterey County Convention & Visitors Bureau (MCCVB) launched a brand and advertising effort in October 2013 (FY13/14 Q2). This “Grab Life by the Moments” campaign included print, digital, Facebook, Twitter and Pandora Radio advertising.

The core target audience is leisure travelers in drive and direct-flight markets (regional markets). The creative is designed to encourage/compel/dare travelers to make the most of a getaway/vacation experience by taking advantage of the unique/varied/life-enhancing experiences found in Monterey County.

While ongoing tracking every six months is important, the impact of advertising & communications takes time to develop and therefore the total impact of a campaign is better measured over a longer period.

We will evaluate two periods in this report: FY14/15 YTD, during which MCCVB spent \$363,000, and calendar year 2014, during which MCCVB spent \$1.38 million.

Media Spending	FY13/14	FY14/15
Q1 (July – Sept.)	\$45,758	\$167,629
Q2 (Oct. – Dec.)	\$388,066	\$195,686
Q3 (Jan. - Mar)	\$348,409	\$235,333
Q4 (April - June)	\$671,768	\$106,745
Total	\$1,454,000	\$705,393

FY14/15 YTD	\$363,315
Calendar Year 2014	\$1,383,492

Background & Objectives

Strategic Marketing & Research Insights (SMARInsights) conducted pre-brand launch research in April 2013. SMARInsights has since conducted three research waves to measure the effectiveness of the advertising. Another wave will be conducted at the end of FY14/15 to measure the overall FY14/15 ROI. MCCVB has maintained its partnership with SMARInsights to gauge and guide the success of the brand.

The following report details the findings from the December 2014 research. This includes a mid-term review of FY14/15 performance and a summary of calendar year 2014 performance. The focus of this report is on the regional markets, as this is where MCCVB invested the majority of its advertising dollars.

The specific objectives of this research are:

- Reviewing the results relative to established benchmarks;
- Evaluating the impact of the advertising campaign on generating Monterey travel that would otherwise not have occurred (incremental trips);
- Reviewing visitor/trip specifics and related marketing implications;
- Estimating economic impact and ROI generated by the incremental trips;
- Quantifying any additional impact from the PR efforts; and
- Providing conclusions and recommendations to guide MCCVB's marketing efforts.

Date	Research Wave
April 2013	Pre-Brand Launch
Dec. 2013	FY13/14 Mid-Term
June 2014	FY13/14 End of Year
Dec. 2014	FY14/15 Mid-Term
June 2015	FY14/15 End of Year

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.
- This current research wave's data was collected from November 24th to December 8th, 2014.
- A total of 1,383 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.
- Upon completion of data collection, a dataset was compiled, cleaned and coded for analysis.
- The following is a summary of the study's key findings.

Market	Completed Surveys
San Francisco	326
Sacramento	254
Los Angeles	172
San Diego	127
Remaining CA	152
*Fly markets – Denver/Phoenix/Vegas	134
Remaining National	264
Total	1,429

Regional Markets

*Denver was removed as a fly market in FY14/15. This market is included in the calendar year results, and is omitted from the FY14/15 YTD results.

FY14/15 Mid-Term Review

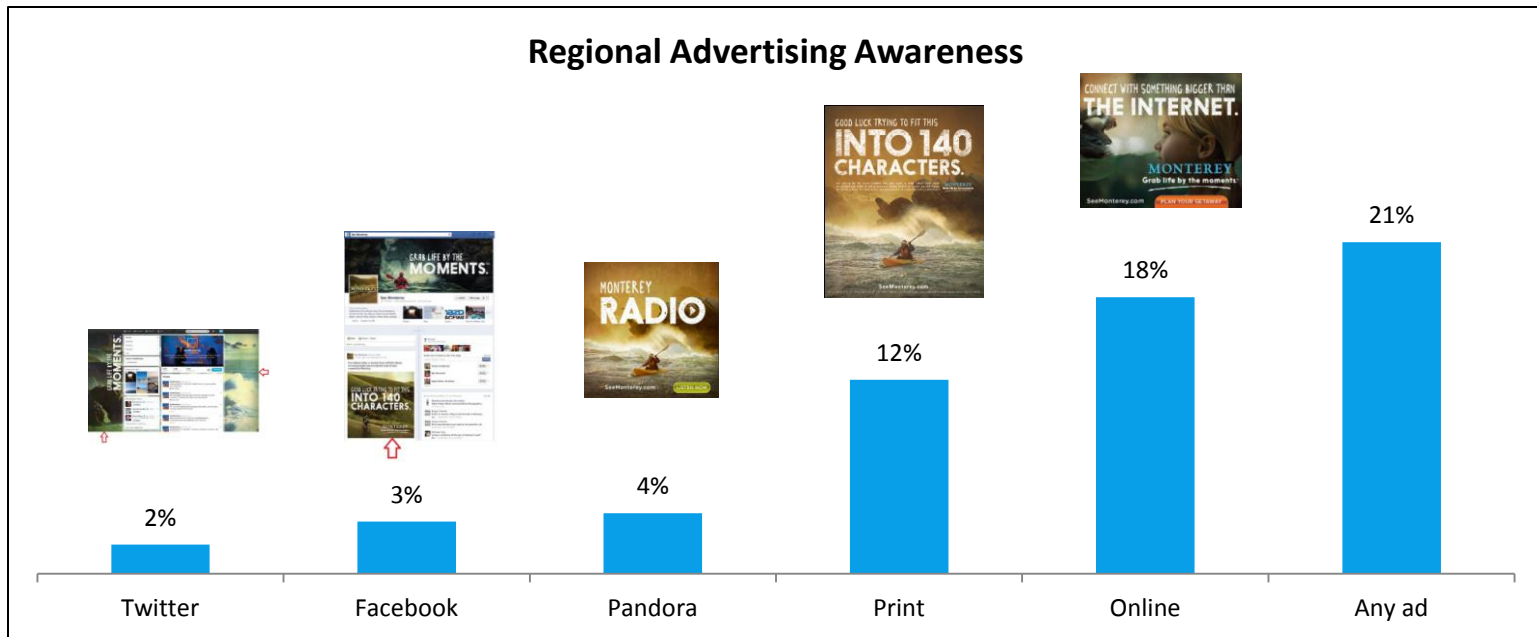
Insights

- The paid advertising reached about one-fifth of the regional target audience in the first half of FY14/15 (about 2.8 million households).
- Public relations is helping to increase overall FY14/15 communications awareness, as one-third of the regional audience recalls seeing the paid advertising or earned media.
- The advertising has maintained the goal level for the scorecard measure relating to generating interest in Monterey travel.
- The paid advertising is generating Monterey travel. When accounting for the first half of FY14/15, about 93,000 Monterey trips and \$97 million in visitor spending are attributable to the advertising. When accounting for calendar year 2014, about 195,000 Monterey trips and \$216 million in visitor spending are attributable to the advertising.
- Paid advertising is having a greater impact on Millennials than among the older generations. Millennials account for only about 30% of the adult population but they generated 57% of ad-influenced overnight Monterey travel revenue.
- Monterey travel is fairly evenly distributed by season. Visitors' travel planning periods also vary, which means that there is no clear "best time" to advertise and that an always-on strategy is advised if possible.
- Only about one-quarter of Monterey travel parties include children. The current ads are on target with their focus on adult travelers, but with some kid-friendly ads.
- The attractions and activities that hold the greatest marketing potential due to their large audience and strong motivating power are Monterey Bay Aquarium, Fisherman's Wharf, 17 Mile Drive, wineries and scenery/sightseeing.

About 2.8 million households are aware of the MCCVB regional advertising in the first half of FY14/15.

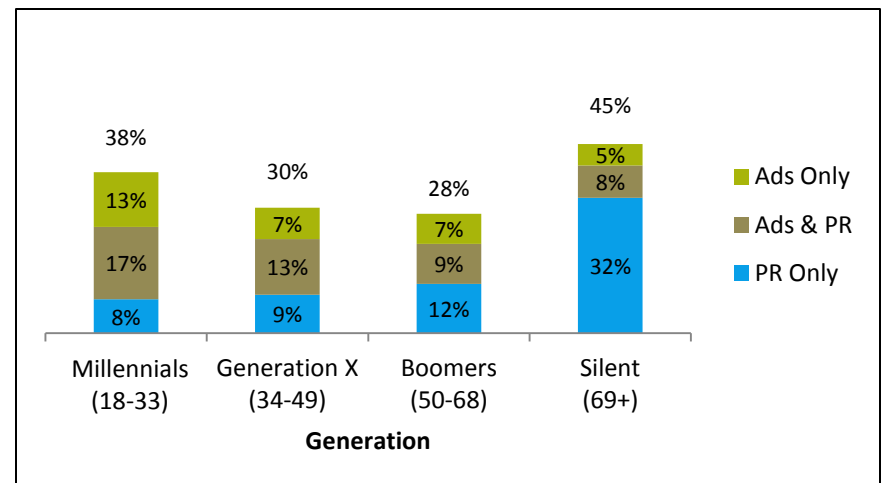
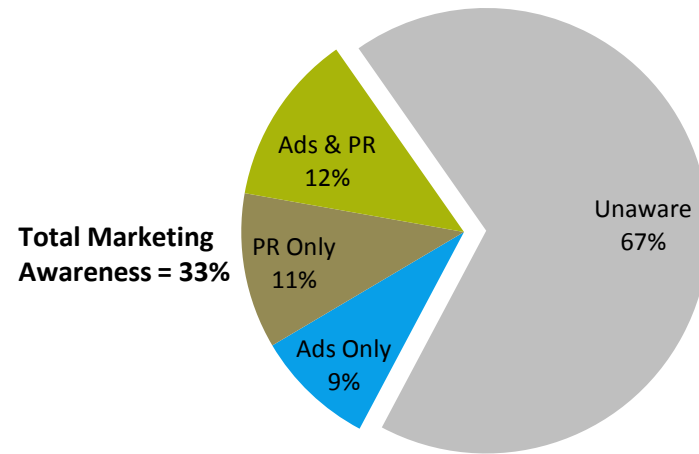
- The paid advertising reached 21% of the regional audience in the first half of FY14/15.
- This equates to about 2.8 million aware households.

Regional Markets	
Traveling HHs	13,046,922
Awareness	21%
Aware HHs	2,774,049

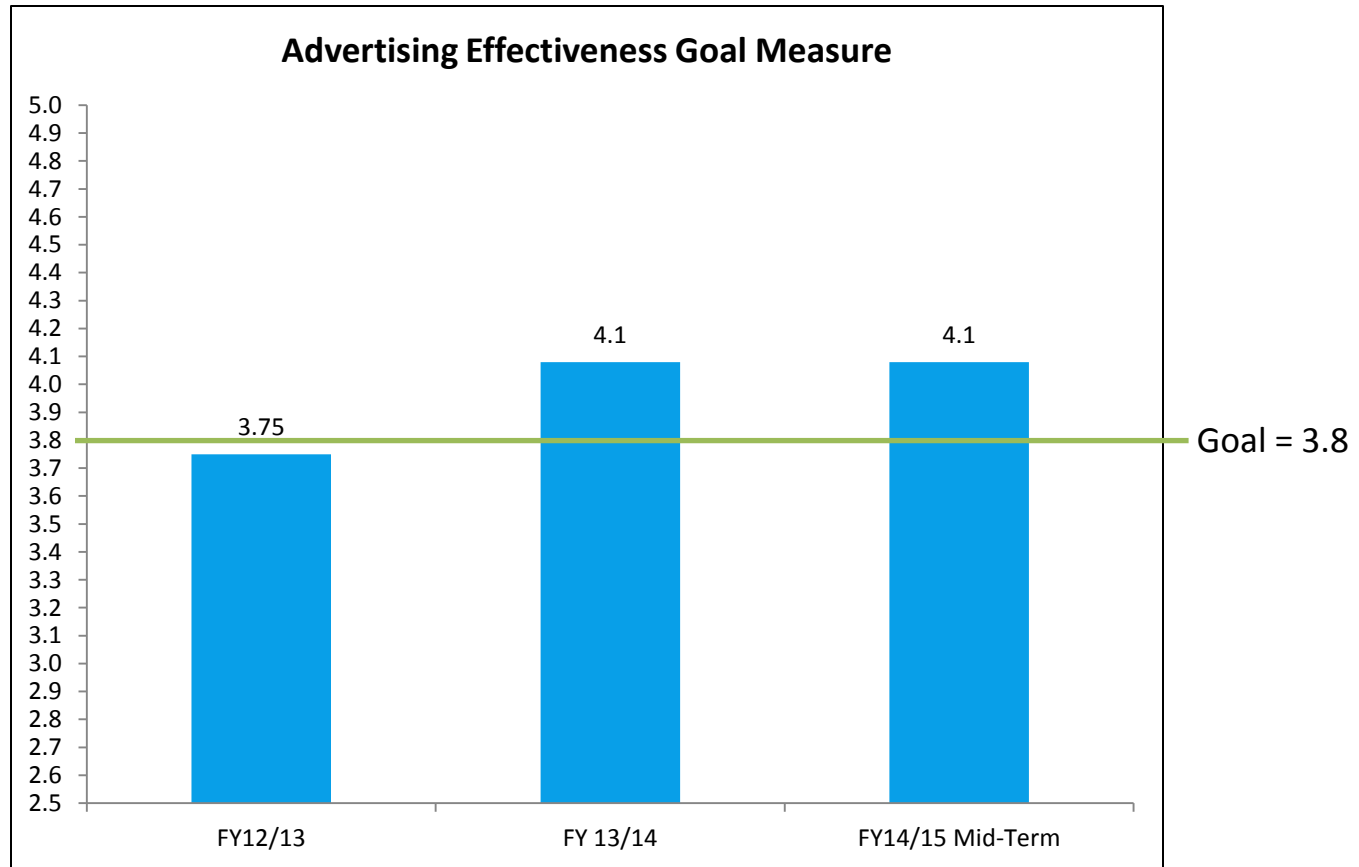


The FY14/15 PR efforts help to increase total marketing awareness.

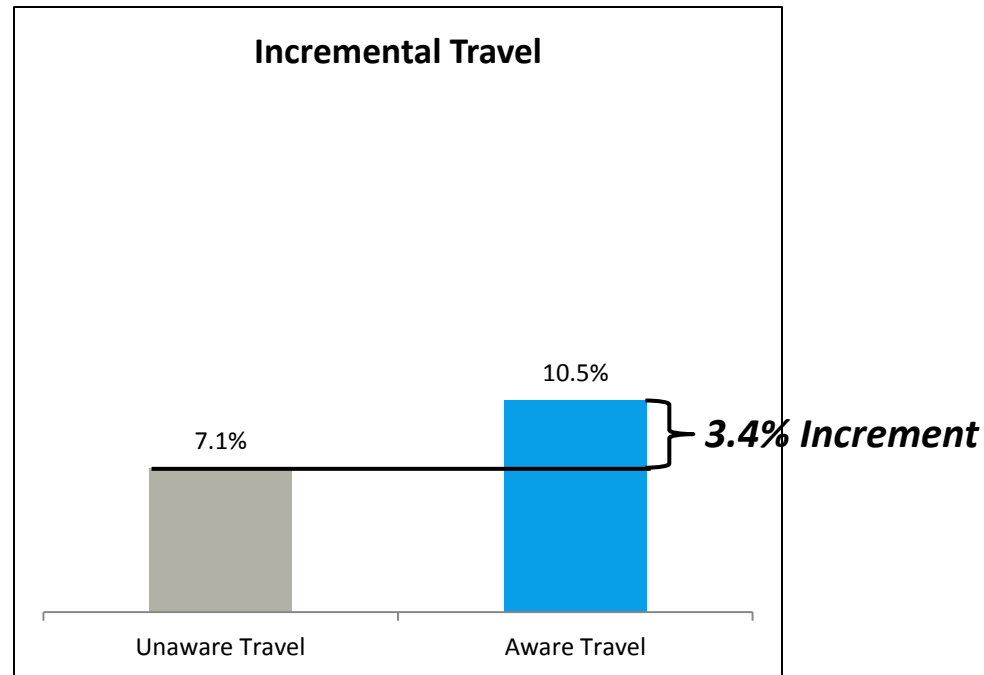
- A notable portion (23%) of the regional audience recalled seeing MCCVB public relations efforts.
- Many of those who recalled the earned media did not recall the paid efforts – increasing the net reach of the campaign.
- This implies that the paid media might reach a distinct/different audience from the earned efforts. This is true, as the oldest travelers are more likely to be aware of “PR only” and PR in general. The youngest group is the most likely to be aware of the paid advertising.



The scorecard goal measure relating to generating interest was maintained.



The advertising influenced overnight Monterey travel during the first half of FY14/15.



About 93,000 July 2014 – December 2014 overnight Monterey trips from the regional markets are attributable to the advertising.

	Total Regional
Traveling HHs	13,046,922
Awareness	21%
Aware HHs	2,774,049
Incremental Overnight Travel %	3.4%
Incremental Overnight Traveling HHs	93,263

Spending Category	Avg. Monterey Trip Spending
Lodging/accommodations	\$369
Meals/food/groceries	\$205
Attractions	\$104
Shopping	\$127
Entertainment	\$32
Transportation	\$134
Other	\$66
Total	\$1,038

- These visitors spent \$1,038 on average while in Monterey.

The advertising generated about \$97 million in regional overnight visitor spending during the first half of FY14/15.

	Total Regional
Incremental Overnight Traveling HHs	93,263
Average Trip Spending	\$1,038
Economic Impact	\$96,786,586

The advertising generated about 230K room nights from the regional markets during the first half of FY14/15.

	Total Regional
Incremental Traveling HHs	93,263
% staying in hotel, motel, inn, lodge, B&B or resort	88%
Incremental trips staying in hotel, motel, inn, lodge, B&B or resort	82,264
Avg. # nights on trip	2.8
Ad-influenced room nights	230,345

Calendar Year 2014 Review

When accounting for advertising throughout calendar year 2014, the MCCVB advertising reached about 3.6 million regional households.

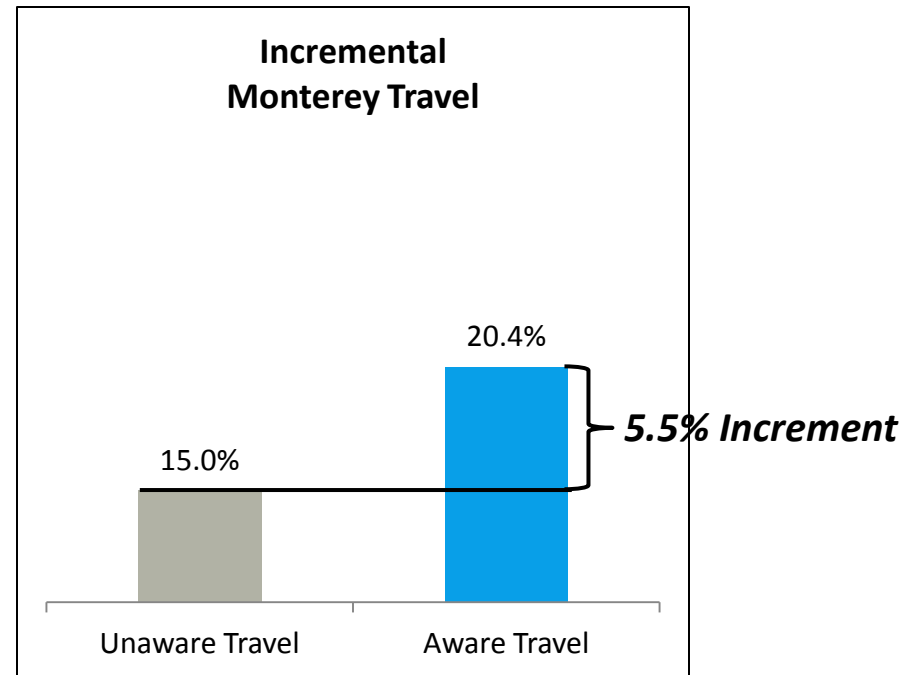
Regional Markets	
*Traveling HHs	14,382,392
Awareness	25%
Aware HHs	3,557,895

*The calendar year calculation includes Denver, so the household base is larger.



The advertising influenced overnight Monterey travel from the regional markets during calendar year 2014.

- This level of ad-influenced travel is about average compared to SMARInsights' benchmarks.



About 195,000 calendar year 2014 overnight Monterey trips from the regional markets are attributable to the advertising.

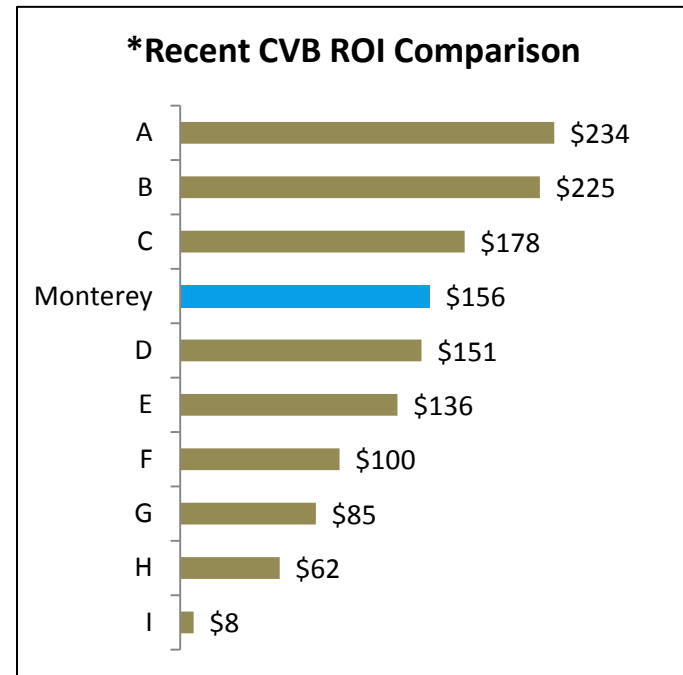
	Total Regional
Traveling HHs	14,382,392
Awareness	25%
Aware HHs	3,557,895
Incremental Overnight Travel %	5.5%
Incremental Overnight Traveling HHs	194,655

Spending Category	Avg. Monterey Trip Spending
Lodging/accommodations	\$361
Meals/food/groceries	\$203
Attractions	\$108
Shopping	\$147
Entertainment	\$37
Transportation	\$179
Other	\$76
Total	\$1,111

- These visitors spent \$1,111 on average while in Monterey.

The advertising generated about \$216 million in regional overnight visitor spending during calendar year 2014.

	Total Regional
Incremental Overnight Traveling HHs	194,655
Average Trip Spending	\$1,111
Economic Impact	\$216,258,111
Regional Media Spend	\$1,383,492
ROI	\$156



*See the Appendix for a list of recent SMARInsights CVB clients.

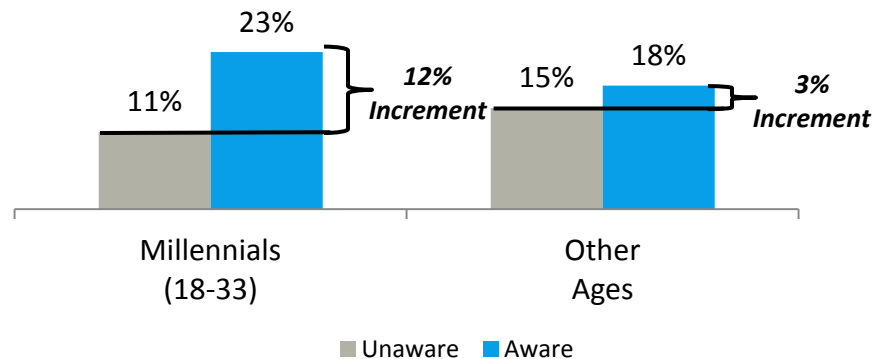
- The calendar year Monterey ROI is above average compared to what SMARInsights has recently measured for CVBs.

The advertising generated about 422K room nights from the regional markets during calendar year 2014.

	Total Regional
Incremental Traveling HHs	194,655
% staying in hotel, motel, inn, lodge, B&B or resort	85%
Incremental trips staying in hotel, motel, inn, lodge, B&B or resort	166,087
Avg. # nights on trip	2.5
Ad-influenced room nights	421,868

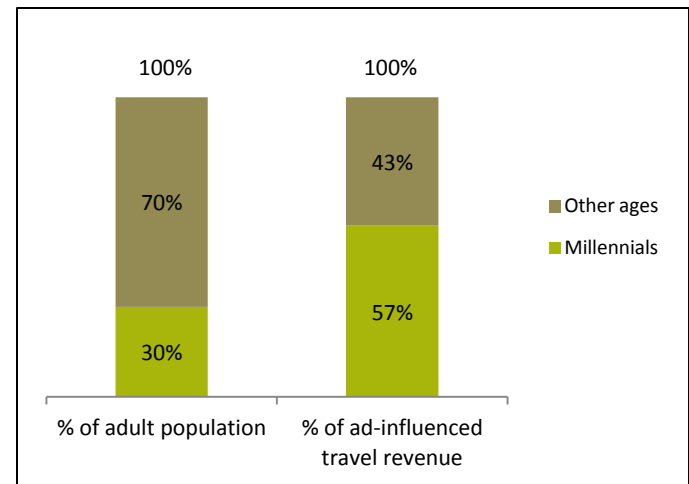
The advertising had a greater impact on Millennials than among the other age groups during calendar year 2014.

Visited Monterey for an Overnight Trip

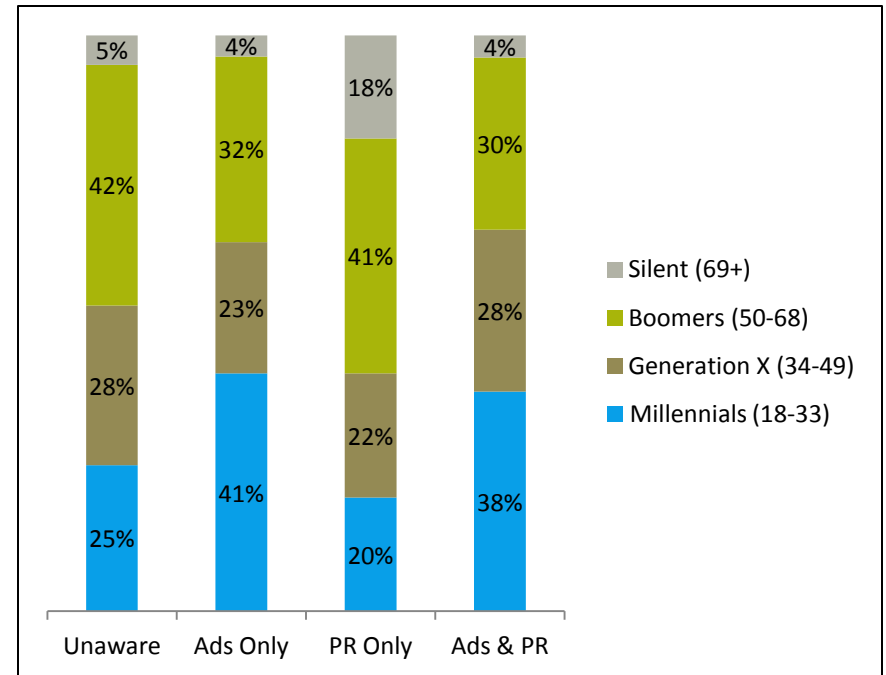
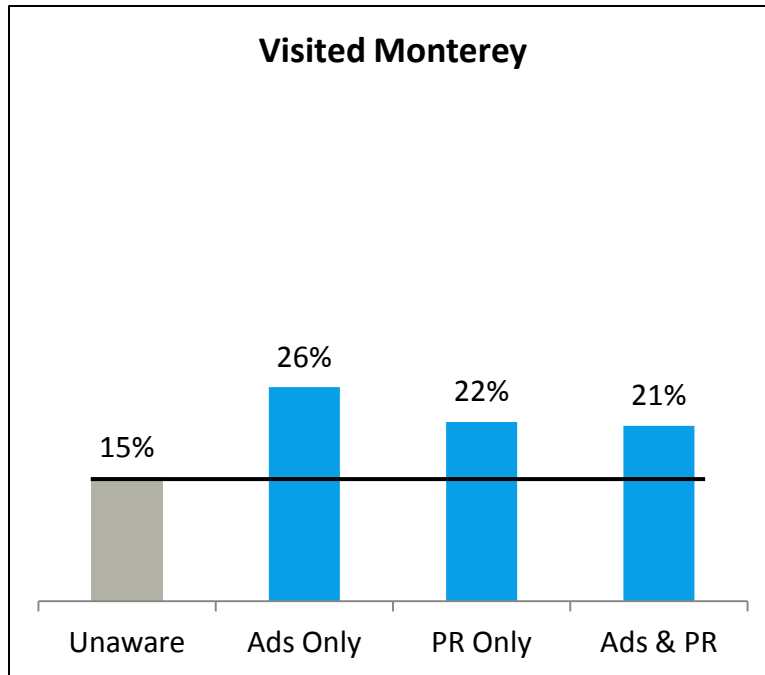


	Millennials	Other Ages
HHs	4.3M	10.1M
Ad Awareness	28%	23%
Incremental Travel %	12%	3%
Avg. Trip Spending	\$967	\$1,356

- Millennials account for only about 30% of the adult population, but generated 57% of ad-influenced overnight Monterey travel revenue.



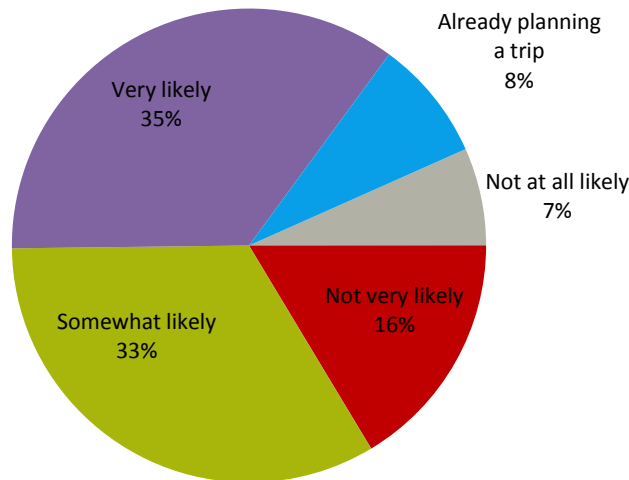
PR is helping to influence travel, but there is no additional lift when combined with the paid advertising.



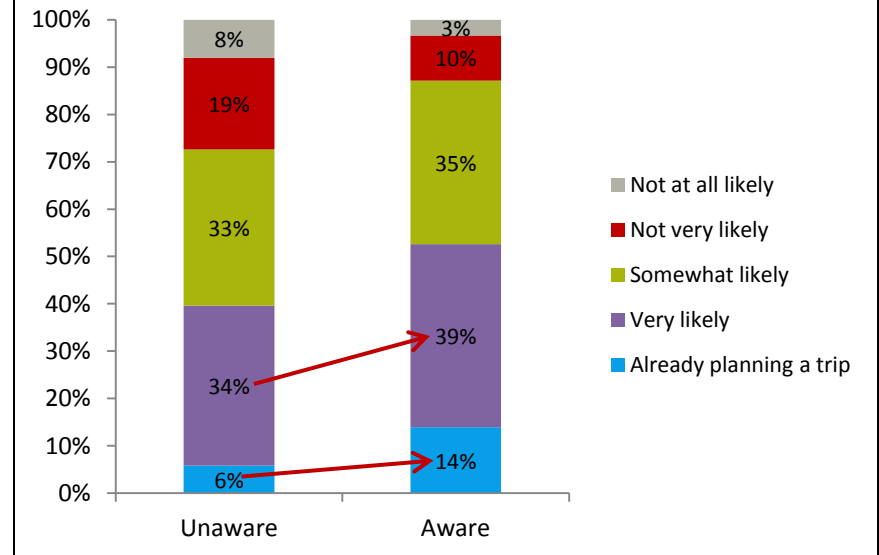
- This is a relatively unusual result, and probably speaks more to the strength of the traditional advertising than to a lack of PR influence. The result is also to some degree due to the fact that those aware of the PR skew older – and we know that the marketing is working better among the younger audience.

The advertising has a positive impact on intent to visit Monterey in the next 24 months.

Likelihood to Visit Monterey in Next 24 Months



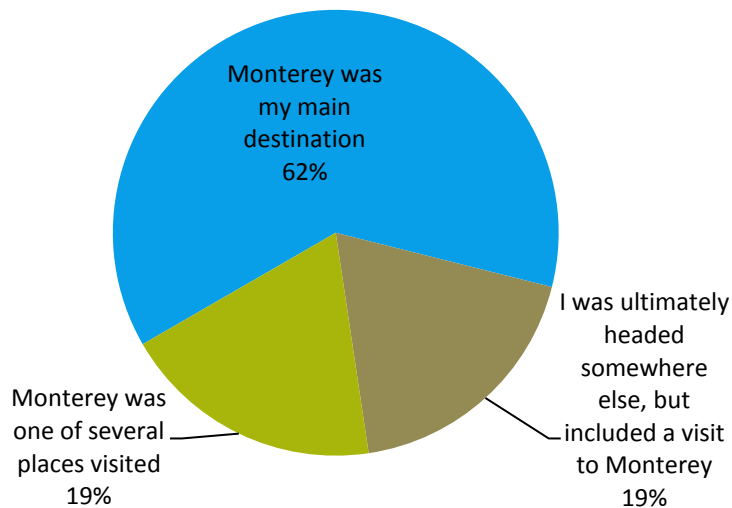
Likelihood to Visit Monterey in Next 24 Months by Ad Awareness



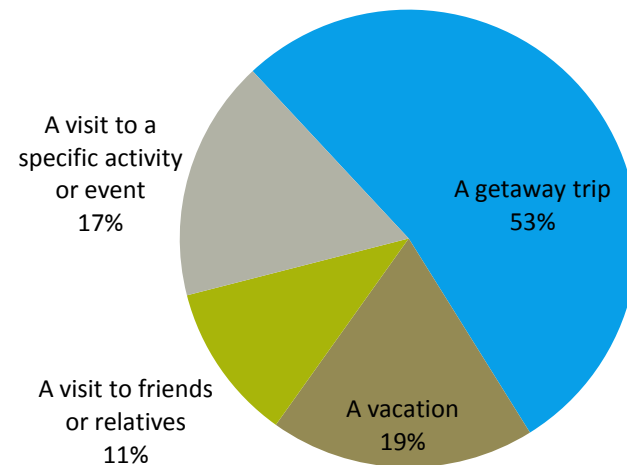
Monterey Trip Specifics & Marketing Implications

Monterey could be marketed as both a destination and a stop on a CA road trip.

Best Describes Monterey Trip

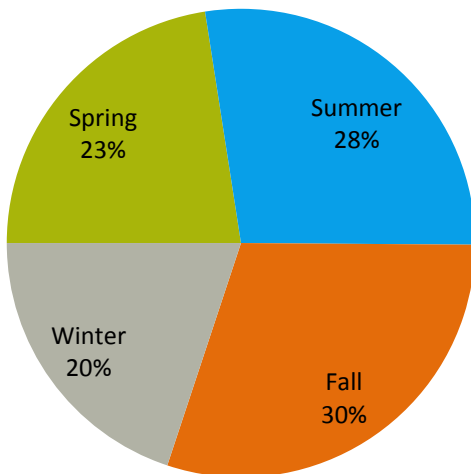


Monterey Trip was...

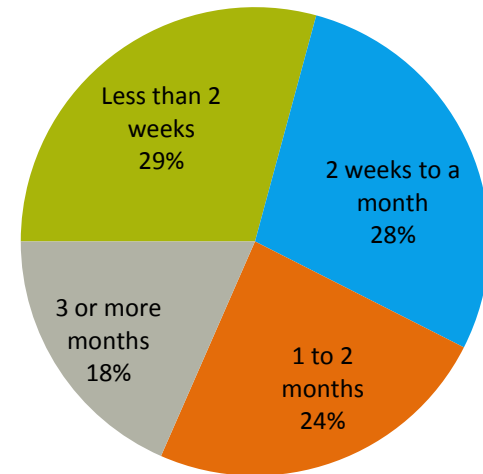


There is no clear “best” time to advertise given fairly even distribution of travel by season and trip planning periods.

Monterey Travel by Season



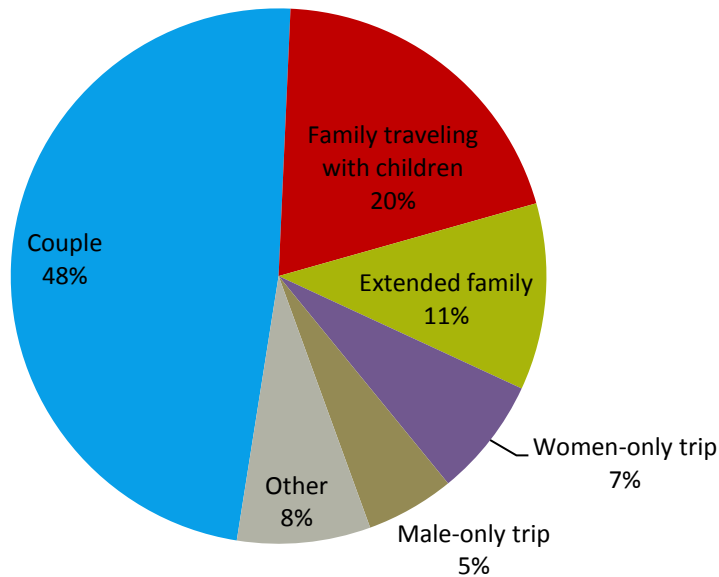
Monterey Travel Planning Period



- The FY14 ads ran primarily from October – June. A nearly always-on media plan is a sound approach.

The current ads are on target with their focus on adult travelers, but with some kid-friendly ads.

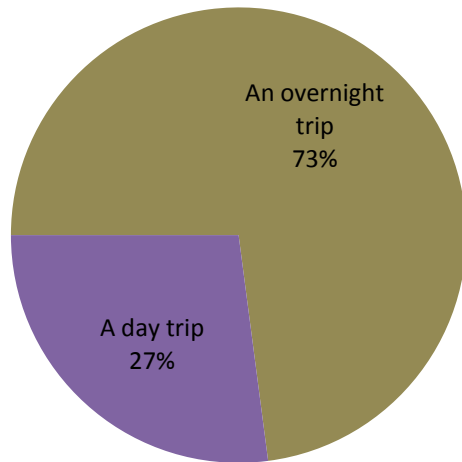
Monterey Travel Party



Average party size	2.8
% of trips including children	25%

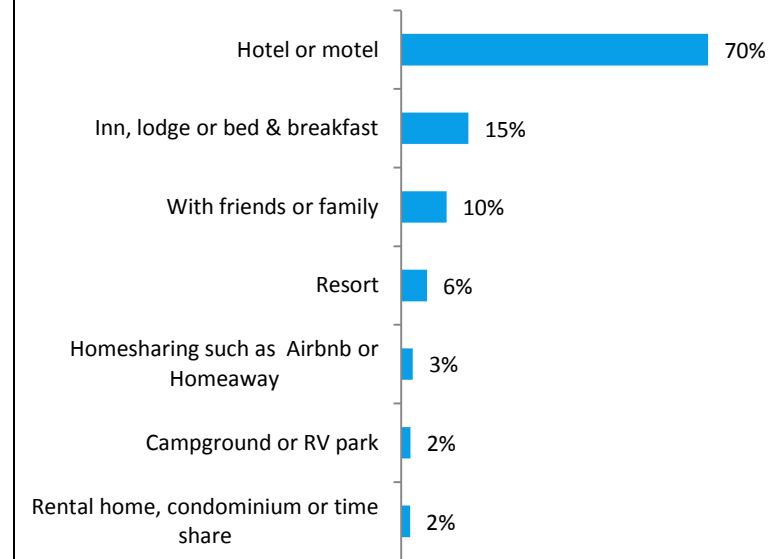
It makes sense to market Monterey as a place for an overnight trip to the regional audience.

Overnight or Day Trip

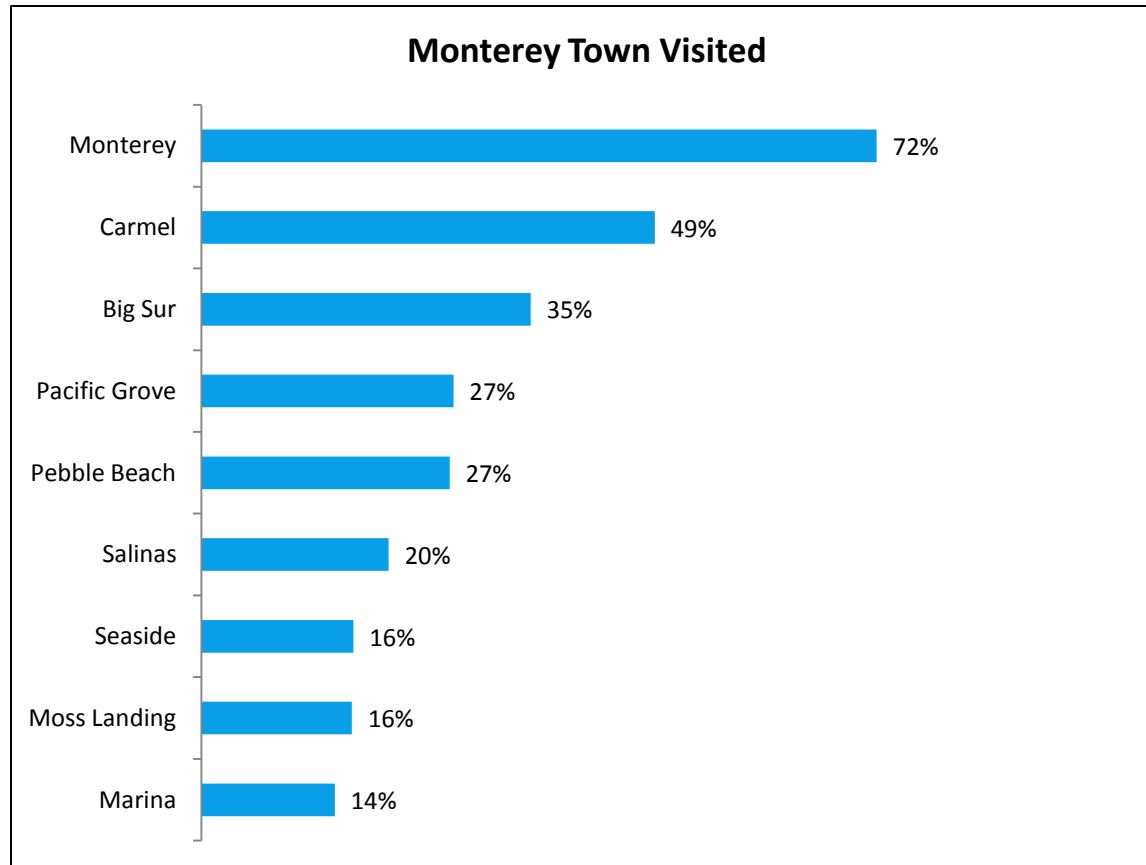


Average = 2.6 nights

Monterey Lodging



Monterey and Carmel hold the most marketing potential in terms of broad appeal.



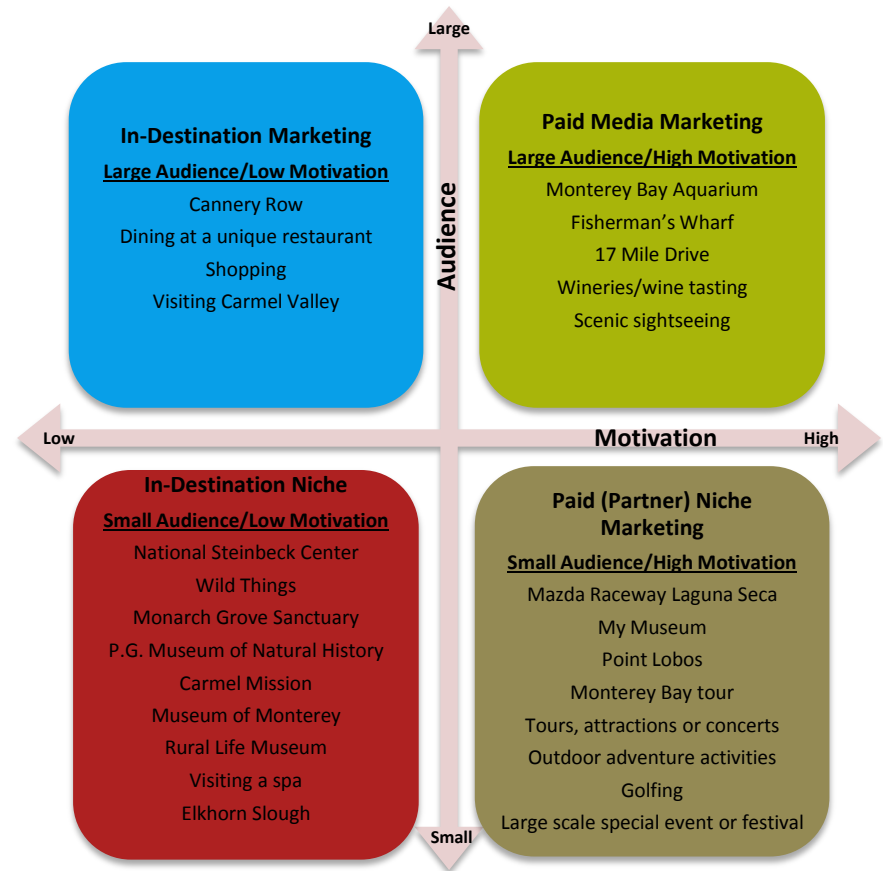
Visitors from the regional markets indicate being motivated by the aquarium, scenery, Fisherman’s Wharf, Cannery Row, 17 Mile Drive, wineries and dining.

- MCCVB should continue to feature these attractions and activities in the advertising.

Monterey Activity/Attraction	% participated/ visited	% of these motivated by activity/ attraction	% of total trips motivated by activity/ attraction
Monterey Bay Aquarium	45%	73%	33%
Scenic sightseeing	38%	57%	22%
Fisherman’s Wharf	41%	36%	15%
Cannery Row	44%	30%	13%
17 Mile Drive	26%	40%	10%
Wineries/wine tasting	17%	60%	10%
Dining at a unique restaurant	35%	27%	9%
Shopping	35%	16%	6%
Outdoor adventure activities	9%	53%	5%
Golfing	6%	78%	4%
Point Lobos	7%	46%	3%
Tours, attractions or concerts	7%	37%	3%
Carmel Mission	10%	25%	3%

Attraction/Activity Classification

- A different way to think about Monterey's leisure travel activities and attractions is to classify them based on the volume of people participating/visiting and their motivating power.
- Those activities with a large audience and strong motivating power are those that should be featured in the paid media advertising. The current advertising is right on target with its promotion of scenery, wineries and the aquarium.
- Activities with a large audience but lower motivating power such as shopping are best promoted at the destination by the specific attraction.
- The activities with a small audience but strong motivating power such as Point Lobos should be promoted by partners to the niche audience.
- Some activities are better suited to in-destination niche marketing due to the small audience and below average motivating power.



Appendix – SMARInsights Clients

Other SMARInsights CVB Clients

- Choose Chicago
- Los Angeles Tourism & Convention Board
- Greater Palm Springs Convention & Visitors Bureau
- Breckenridge, Colorado
- Dallas Convention & Visitors Bureau
- Gatlinburg Convention & Visitors Bureau
- Visit Indy
- Hamilton County Tourism, Indiana
- Asheville Convention & Visitors Bureau
- San Diego Tourism Authority
- Branson/Lakes Area Convention & Visitors Bureau
- Phoenix Convention & Visitors Bureau
- Kissimmee, Florida, Convention & Visitors Bureau
- Ocala/Marion County, Florida, Convention & Visitors Bureau
- Park City, Utah, Chamber/Bureau
- San Antonio Convention & Visitors Bureau
- St. Louis Convention & Visitors Commission
- Visit Orlando

Appendix – Questionnaire

Questionnaire

**Monterey County CVB
Brand & Advertising Survey
Wave 4 ROI Questionnaire
November 2014**

QZIP. First, what is your ZIP code? _____

S1. Who in your household is primarily responsible for making decisions concerning travel destinations?

- 1..... SELF
- 2..... SELF & OTHER
- 3..... SPOUSE/OTHER → TERMINATE

S2. In the last year, have you taken an overnight leisure trip at least 50 miles from home?

- Yes
- No → TERMINATE

1. How many of the following types of trips have you taken in the past year?

- a. A vacation or leisure trip that included at least 3 nights in paid lodging and the main purpose was not to visit family?
- b. A getaway trip that included at least one night in paid lodging and the main purpose was not to visit family?

	Vacation Trip	Getaway Trip
None		
One		
Two		
Three		
Four or More		

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

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

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

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

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

	Not at all Familiar	Somewhat Familiar	Very Familiar
Monterey County, which includes a number of towns: Big Sur, Carmel, Monterey and Pebble Beach among others			
Sonoma/Napa Valley			
Santa Barbara			
Palm Springs			
San Francisco			
San Diego			
Lake Tahoe			

3.

	Please check the areas that you have visited for a leisure trip since September 2013 (day trip or overnight trip).	How many trips have you taken to this area since September 2013?
Big Sur	<input type="checkbox"/>	<input type="checkbox"/>
Carmel	<input type="checkbox"/>	<input type="checkbox"/>
Lake Tahoe	<input type="checkbox"/>	<input type="checkbox"/>
Marina	<input type="checkbox"/>	<input type="checkbox"/>
Monterey	<input type="checkbox"/>	<input type="checkbox"/>
Moss Landing	<input type="checkbox"/>	<input type="checkbox"/>
Pacific Grove	<input type="checkbox"/>	<input type="checkbox"/>
Palm Springs	<input type="checkbox"/>	<input type="checkbox"/>
Pebble Beach	<input type="checkbox"/>	<input type="checkbox"/>
Salinas	<input type="checkbox"/>	<input type="checkbox"/>
San Francisco	<input type="checkbox"/>	<input type="checkbox"/>
San Diego	<input type="checkbox"/>	<input type="checkbox"/>
Santa Barbara	<input type="checkbox"/>	<input type="checkbox"/>
Seaside	<input type="checkbox"/>	<input type="checkbox"/>
Sonoma/Napa Valley	<input type="checkbox"/>	<input type="checkbox"/>
None of these	<input type="checkbox"/>	<input type="checkbox"/>

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Questionnaire

IF Q3 DOES NOT EQUAL MONTEREY COUNTY VISITOR, SKIP TO INTRO BEFORE ADS.
MONTEREY COUNTY VISITOR IF Q3 = BIG SUR, CARMEL, MARINA, MONTEREY, MOSS
LANDING, PEBBLE BEACH, PACIFIC GROVE, SALINAS OR SEASIDE.

4. You indicated that you visited (MONTEREY TOWNS FROM Q3), which are/is in Monterey County. Where else within Monterey County did you go on this trip? ASK ONLY OF THOSE NOT ALREADY MENTIONED.
1. Big Sur
 2. Carmel
 3. Marina
 4. Monterey
 5. Moss Landing
 6. Pacific Grove
 7. Pebble Beach
 8. Salinas
 9. Seaside
 10. Other (Please specify) _____
 11. None of these
5. Which of the following best describes your most recent trip to Monterey County?
1. Monterey County was my main destination
 2. I was ultimately headed somewhere else, but included a visit to Monterey County
 3. Monterey County was one of several places I decided to visit on this trip

ASK Q5A IF Q5 = 2 OR 3

- 5a. Where else did you visit? _____
6. Which of the following best describes your visit to Monterey County?
1. A getaway trip
 2. A vacation
 3. A visit to friends or relatives
 4. A visit to a specific activity or event. Please specify _____
7. During what month(s) did you visit Monterey County?
- ALLOW MULTIPLES September 2013
 - October 2013
 - November 2013
 - December 2013
 - January 2014
 - February 2014
 - March 2014
 - April 2014
 - May 2014
 - June 2014
 - July 2014
 - August 2014
 - September 2014
 - October 2014
 - November 2014
 - December 2014

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IF MULTIPLE VISITS, ASK Q7A.

7a. 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 Q7.

FOR REMAINING TRIP QUESTIONS, INSERT MONTH/YEAR OF SINGLE OR PRIMARY MONTEREY TRIP.

8. Was your MONTH/YEAR trip...?
1. An overnight trip
 2. A day trip

ASK Q9 AND Q10 ONLY IF Q8 = OVERNIGHT TRIP

9. How many nights did you spend in Monterey County during this MONTH/YEAR trip?
RECORD NUMBER _____
10. What form(s) of lodging did you use during your MONTH/YEAR trip?
1. Hotel or motel
 2. Inn, lodge or bed & breakfast
 3. Resort
 4. Campground or RV park
 5. Rental home, condominium or time share
 6. With friends or family
 7. Homesharing/vacation rental, i.e., booked through Airbnb, Homeaway, etc
 8. Other (Please specify) _____

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

Monterey Bay Aquarium	<input type="checkbox"/>
Cannery Row	<input type="checkbox"/>
Fisherman's Wharf	<input type="checkbox"/>
17 Mile Drive	<input type="checkbox"/>
Mazda Raceway Laguna Seca	<input type="checkbox"/>
National Steinbeck Center	<input type="checkbox"/>
My Museum	<input type="checkbox"/>
Wild Things	<input type="checkbox"/>
Monarch Grove Sanctuary	<input type="checkbox"/>
Pacific Grove Museum of Natural History	<input type="checkbox"/>
Carmel Mission	<input type="checkbox"/>
Museum of Monterey	<input type="checkbox"/>
Monterey County Agricultural & Rural Life Museum	<input type="checkbox"/>
Wineries/Wine Tasting	<input type="checkbox"/>
Point Lobos	<input type="checkbox"/>
Scenic Sightseeing	<input type="checkbox"/>
Monterey Bay tour	<input type="checkbox"/>
Visiting a spa	<input type="checkbox"/>
Tours, Attractions or Concerts	<input type="checkbox"/>
Outdoor Adventure activities	<input type="checkbox"/>
Golfing	<input type="checkbox"/>

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Questionnaire

Dining at a unique restaurant	<input type="checkbox"/>
Shopping	<input type="checkbox"/>
Large scale special event or festival	<input type="checkbox"/>
Visited Carmel Valley	<input type="checkbox"/>
Elkhorn Slough	<input type="checkbox"/>
Other, specify _____	<input type="checkbox"/>
None	<input type="checkbox"/>

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

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

12. Including you, how many people were on this MONTH/YEAR trip?
RECORD NUMBER _____ (IF 1, SKIP TO Q14)

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

13. Which best describes your travel party for this MONTH/YEAR trip?

- 1.....Couple
- 2.....Family traveling with children
- 3.....Extended family
- 4.....Women only trip
- 5.....Male only trip
- 6.....Other, SPECIFY _____

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

- 1...Less than one week
- 2...One to two weeks
- 3...Two to three weeks
- 4...Three to four weeks,
- 5...1 - 2 months
- 6...3-4 months or
- 7...More than four months in advance
- 8...Don't know

15. Thinking about your overall travel experience in Monterey County would you say it was...

1. Poor
2. Fair
3. Good
4. Very Good
5. Excellent

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

Lodging/Accommodations _____
 Meals/Food/Groceries _____
 Entertainment/Attractions _____
 Shopping _____
 Entertainment such as shows, theater or concerts _____

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Transportation such as gasoline, auto rental or flight costs _____
 Other _____

16a. Did you use Wi-Fi Internet access while on your MONTH/YEAR trip to Monterey?

1. Yes
2. No

17. How likely are you to visit each of the following areas in the next 24 months for an overnight leisure trip? [ROTATE]

	Not at all Likely	Not Very Likely	Somewhat Likely	Very Likely	Already planning a trip
Monterey County, which again includes a number of towns: Big Sur, Carmel, Monterey and Pebble Beach among others					
Sonoma/Napa Valley					
Santa Barbara					
Palm Springs					
San Francisco					
San Diego					
Lake Tahoe					

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

Beautiful scenery	1
Wineries and wine experiences	1
Outdoor adventure opportunities	1
World class resorts	1
A lot of culture and history	1
Amazing food and wine options	1
Attractions for kids and the family	1
Shopping	1
National parks and other outdoor options	1
Intimate inns and romantic experiences	1
World Class Golf	1
Opportunity to enjoy beaches and the ocean	1
Opportunity to see and learn about marine environment and wildlife	1
Fun Nightlife	

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Questionnaire

Now I'd like to ask you about some travel advertising to find out if you recall seeing these ads.

PRINT ADS. SHOW IN GROUPS OF 3:

GROUP 1:

Into 140 Characters.jpg
The Internet.jpg
Can Wait.jpg

GROUP 2:

Yeah Right.jpg
Bottle or the Glass.jpg
Can Gallop.jpg

GROUP 3:

Get Lost.jpg
Insignificant.jpg
Adventure too.jpg

ASK Q19 FOR EACH GROUP OF PRINT ADS

19. Have you seen any of these print ads before?

- Yes
- No

DIGITAL ADS:

Please review the following Online advertisements and answer the question below.

ASK Q20 FOR THESE ONLINE ADS:

family 160 x 600.jpg
family 300 x 250.jpg
food wine 160 x 600.jpg
golf 160 x 600.jpg

20.

- I have seen this online advertising before
- I have not seen this online advertising before

ASK Q20A FOR THESE ONLINE ADS (SHOW IN GROUPS)

GENERAL DRIVE GROUP:

general drive 160 x 600.jpg
general drive 300 x 250.jpg
general drive 728 x 90.jpg

GENERAL FLY GROUP:

general fly 160 x 600.jpg
general fly 300 x 250.jpg
general fly 728 x 90.jpg

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20a. Have you seen any of these online ads before?

- Yes
- No

SOCIAL MEDIA ADS

Please review the following Social Media advertisements and answer the question below.

106Facebook.jpg

21. Have you seen this Facebook advertising before?

- Yes
- No
- I don't use Facebook

106twitter.jpg

22. Have you seen this Twitter advertising before?

- Yes
- No
- I don't use Twitter

PANDORA ADS

SHOW ALL ON SAME SCREEN:

MobileAudio_MontereyCVB.JPG
MobileBanner_MontereyCVB.jpg
WebBrandedRadio_StationTargeted_MontereyCVB.jpg
WebBrandedRadio_TrafficDriver_MontereyCVB.JPG
Pandora Asset.jpg

23. Have you seen any of these Pandora Radio ads before?

- Yes
- No
- I don't use Pandora radio

24. 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?

1. Yes
2. No

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Questionnaire

24a. (IF YES) What was the information that was in this news story, article or feature? Choose as many as apply.

- Come to Monterey for the wine, stay for the views
- Beauty of the Big Sur region
- Long weekend in Monterey
- Monterey of my own
- Sea otters of Monterey Bay
- 7 steps to a wonderful weekend in Carmel-by-the-Sea, California
- Tentacles Monterey Bay Aquarium – the astounding lives of octopuses, squid, and cuttlefishes
- Dreamy Cold weather weekend escapes
- Monterey County named top wine destination
- Pebble Beach Pro Am
- Deals on golf in Monterey County/Pebble Beach
- Family trips in Monterey County and Carmel
- Monterey County as a culinary/foodie destination
- Big Sur Boutique motel
- Other, please specify _____ --

25. Have you visited the website for Monterey County to get travel or visitor information?

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

25a. (IF YES) Is this the website you visited?

- Yes
- No

INSERT SCREENSHOT OF WEBSITE

Monterey Website 2014.png

ASK IF THEY VISITED MONTEREY AND THEY VISITED THE WEBSITE:

25b. You indicated that you have visited Monterey and that you went to the Monterey website. Had you already decided to visit Monterey when you went to the website?

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

The following questions are for classification purposes only, and will help us understand different groups of people.

D1. Are you...?

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

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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 best represents the last grade of school you completed?

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

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

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

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

(ALLOW MULTI)

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

D7. What is your age? _____

D8. Are you...

- Male
- Female

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Appendix – Ads

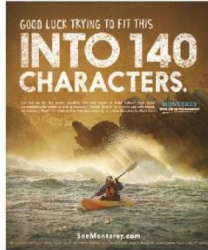
Ads

2013 Research/Wave 3 May 2014
 Monterey County CVB
 2014 Ad Effectiveness – Wave 3

Print



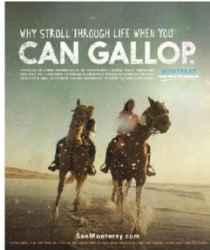
Adventure too.jpg



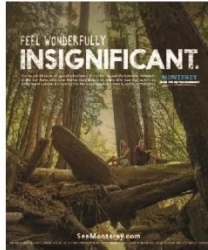
Into 140 Characters.jpg



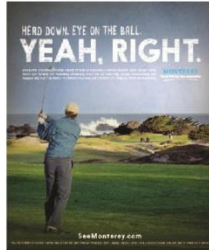
Get Lost.jpg



Can Gallop.jpg



Insignificant.jpg



Yeah Right.jpg



Bottle or the Glass.jpg



The Internet.jpg



Can Wait.jpg

1

Online



family 160 x 600.jpg



family 300 x 250.jpg



food wine 160 x 600.jpg



general drive 160 x 600.jpg



general drive 300 x 250.jpg



general drive 728 x 90.jpg

2

Ads



general fly 160 x 600.jpg



general fly 300 x 250.jpg



general fly 728 x 90.jpg



golf 160 x 600.jpg

Website



Monterey Website 2014.JPG

3

Mobile



MobileAudio_MontereyCVB.JPG



MobileBanner_MontereyCVB.jpg

Web Branded Radio



WebBrandedRadio_StationTargeted_MontereyCVB.jpg



WebBrandedRadio_TrafficDriver_MontereyCVB.JPG

4

Ads

Facebook



Facebook.jpg

Twitter



twitter.jpg

Pandora



Pandora Asset.jpg