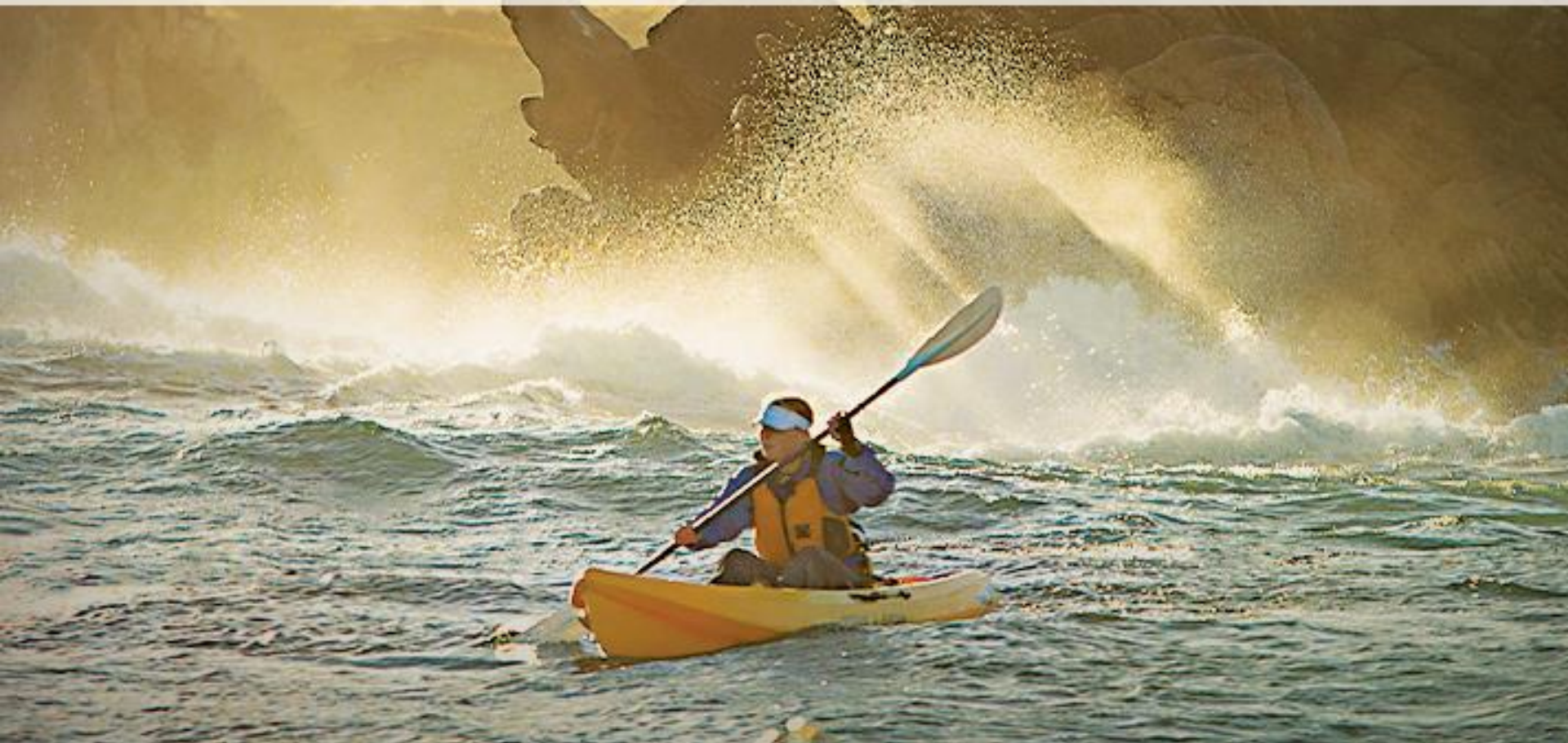


MCCVB

Marketing Intelligence Report

October 19, 2016



MARKETING INTELLIGENCE REPORT

This report summarizes key research managed and compiled by MCCVB.

- EOY 2015-2016 Communications Effectiveness Study-
by Strategic Marketing & Research Inc.
- FY16-17 Visitor Profile Study, Q1 Wave –
by Destination Analysts

EOY 2015-2016 July Communication Effectiveness Study



MONTEREY
Grab life by the moments:

BACKGROUND & OBJECTIVES

In 2015-16, the Monterey County Convention & Visitors Bureau (MCCVB) continued the “Grab Life by the Moments” brand and advertising effort begun in fall 2013. The campaign targets leisure travelers in drive and direct-flight (regional) markets. The creative is designed to compel travelers to make the most of a getaway/vacation by taking advantage of the unique experiences found in Monterey County.

To measure the success of the seasonal efforts, MCCVB partnered with Strategic Marketing & Research Insights (SMARInsights) to conduct a baseline measure in April 2013, with subsequent measures every six months.

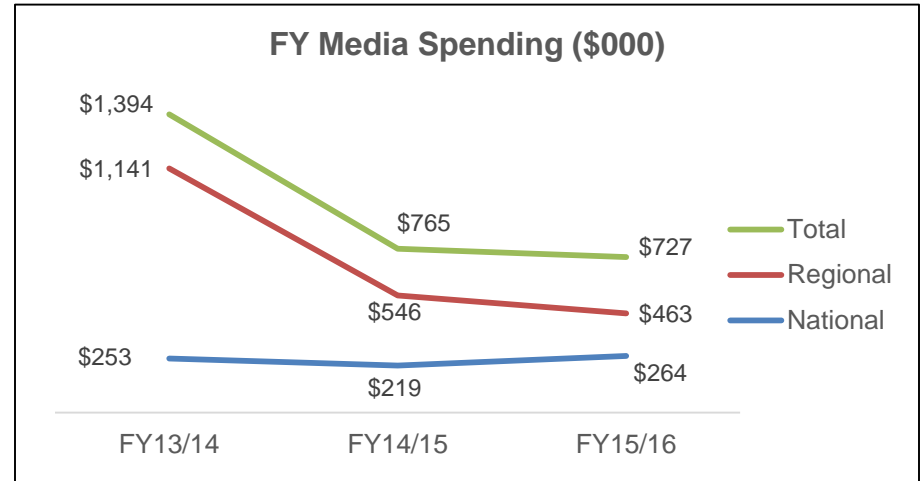
MCCVB launched new spring ads in FY15/16 Q3-Q4. The following report details the findings related to this fall advertising with comparisons to previous waves.

- The specific objectives of this research are to:
 - Review the results relative to established benchmarks;
 - Assess audience reaction to the creative elements;
 - Evaluate the impact of the advertising campaign on generating Monterey travel;
 - Review visitor/trip specifics and related marketing implications;
 - Estimate ad-influenced travel and associated travel revenue;
 - Quantify additional impact from the PR efforts; and
 - Provide conclusions and recommendations to guide MCCVB’s marketing efforts.

Date	Research Wave
April 2013	Pre-Brand Launch
Dec. 2013	FY13/14 Midyear
June 2014	FY13/14 End of Year
Dec. 2014	FY14/15 Midyear
June 2015	FY14/15 End of Year
Dec. 2015	FY15/16 Midyear
June 2016	FY15/16 End of Year

MEDIA & CAMPAIGN SPENDING

- MCCVB launched new digital, print, and social media ads in spring of FY15/16, along with native ads.
- MCCVB has continued to reduce regional media spending year over year while national has remained fairly consistent. While spring spending was initially heavier than fall, MCCVB has balanced the two seasonal campaigns as of this fiscal year.
- With this wave of research, measurement of traditional print and digital media awareness and impact was augmented with native advertising and an expanded PR measure. The current ads used in the survey can be found in the Appendix of this report.



	FY13/14			FY14/15			FY15/16		
	National	Regional	Total	National	Regional	Total	National	Regional	Total
Q1 (July-Sept.)	\$0	\$45,758	\$45,758	\$50,624	\$177,005	\$227,629	\$ 72,250	\$ 119,696	\$ 191,946
Q2 (Oct.-Dec.)	\$61,819	\$326,247	\$388,066	\$71,347	\$124,339	\$195,686	\$ 81,250	\$ 105,038	\$ 186,288
Q1-Q2 Total	\$61,819	\$372,005	\$433,824	\$121,971	\$301,344	\$423,315	\$ 153,500	\$ 224,734	\$ 378,234
Q3 (Jan.-March)	\$52,888	\$295,521	\$348,409	\$71,965	\$163,368	\$235,333	\$ 57,750	\$ 111,266	\$ 169,016
Q4 (April-June)	\$137,847	\$473,921	\$611,768	\$25,085	\$81,660	\$106,745	\$ 52,750	\$ 127,150	\$ 179,900
Q3-Q4 Total	\$190,735	\$769,442	\$960,177	\$97,050	\$245,028	\$342,078	\$ 110,500	\$ 238,416	\$ 348,916
FY Total	\$252,554	\$1,141,447	\$1,394,001	\$219,021	\$546,372	\$765,393	\$ 264,000	\$ 463,150	\$ 727,150

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 in June 2016.
- A total of 1,261 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	252
Sacramento	251
Los Angeles	126
San Diego	129
Remaining CA	128
Fly markets – Phoenix/Vegas	127
Remaining National	248
Total	1,261

Regional Markets

Insights

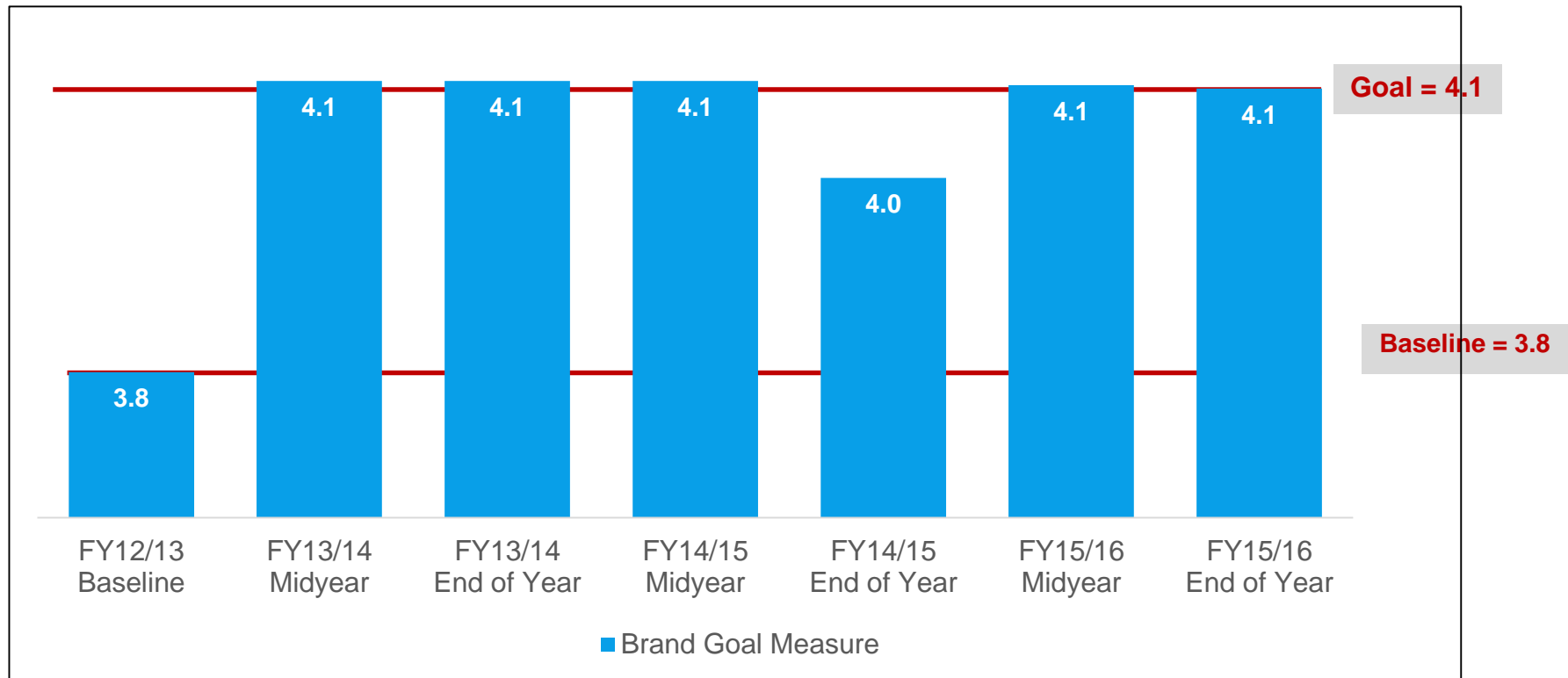
A photograph of two women riding horses on a beach at sunset. The sun is low on the horizon, creating a warm, golden glow and lens flare effects. The women are smiling and looking towards the camera. The horses are dark-colored and are walking on the sand. The overall mood is peaceful and scenic.

MONTEREY
Grab life by the moments:

INSIGHTS

- The spring paid advertising reached a third (33%) of the regional target audience in FY15/16. MCCVB spent \$0.10 to reach a regional target household. SMARInsights' benchmark for a similar campaign is \$0.35.
- With the addition of native advertising, spring campaign awareness level reaches 38%. The native advertising also contributed to substantially higher creative ratings for the spring campaign, particularly for making Monterey County seem like a desirable place to visit and showing the variety of sites and activities it offers. The additional information and newsy tone of the native ads appears to reach and resonate with travelers. The content related to trip itineraries seems to break through most among regional travelers.
- The paid advertising is also generating Monterey travel. In FY15/16, nearly 110,000 overnight Monterey trips and \$116 million in visitor spending are attributable to the spring advertising. Influenced spring trips outnumber fall trips, and there is likely a seasonality factor, with heavier family travel in spring.
- The spring campaign surpassed the scorecard measure relating to generating interest in Monterey travel, as measured by both the brand measure (which is at 4.1 among ad-aware travelers) and visit intent (which is at 38% among ad-aware travelers).
- In general, the long-term campaign with its seasonal refresh and consistent look and feel has contributed to strong awareness and impact. However, there are some aspects of the campaign to be considered. In particular, the shift away from print ads – which reach a much wider audience and, notably, present the destination to those who may not be considering it – toward digital means that the ads are more likely to be presented to those who are already interested in Monterey.
- Ad/PR overlap is at an all-time high. Incorporating the full paid advertising campaign (including native) and PR, over half of Millennial and GenX regional travelers are aware of MCCVB's spring marketing messaging.

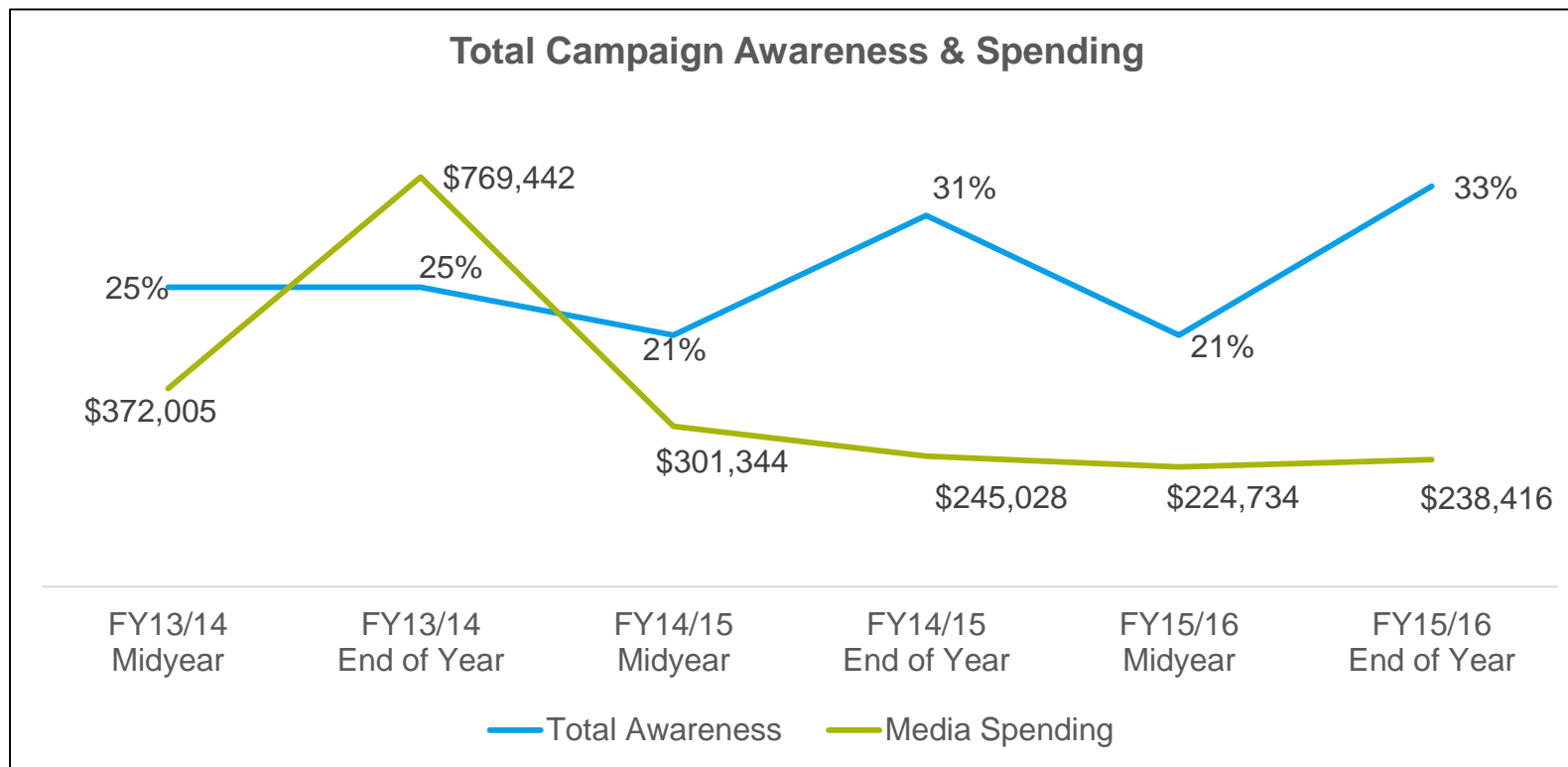
BRAND GOAL MEASURE REMAINS UP FROM BASELINE (AT GOAL), AND HAS REMAINED STABLE THROUGHOUT THE CURRENT FY



The brand goal measure is the mean Monterey rating for *amazing scenery*, *charming* and *weekend getaway destination*.

A THIRD OF THE REGIONAL AUDIENCE IS AWARE OF MCCVB SPRING ADVERTISING

- At 33%, spring ad awareness is on par with the previous end-of-year measure. While the ads are new, the campaign's look and feel are consistent with prior ads, which likely is contributing to the growing awareness despite somewhat consistent spending.



Spending figures are revised from prior reporting to show only spending for current (rather than cumulative) reporting periods.

MCCVB SPENT \$0.06 TO REACH A REGIONAL TARGET HOUSEHOLD WITH THE SPRING ADVERTISING WAVE

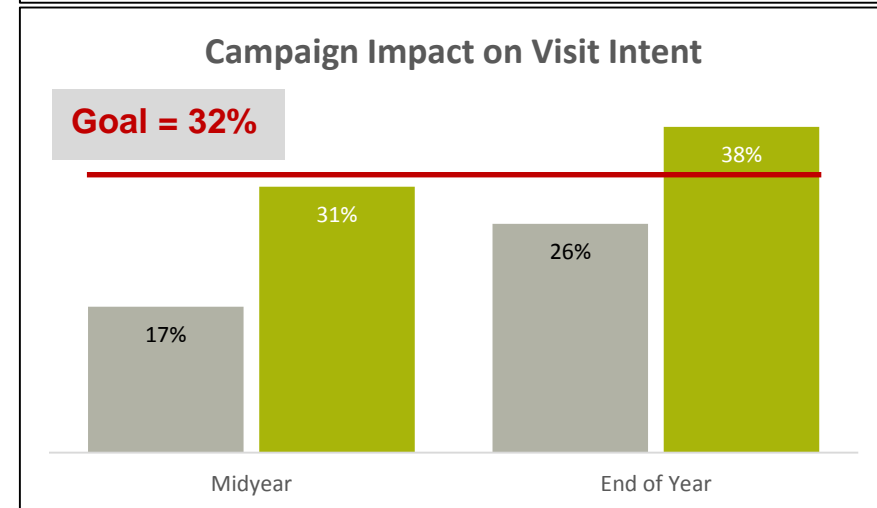
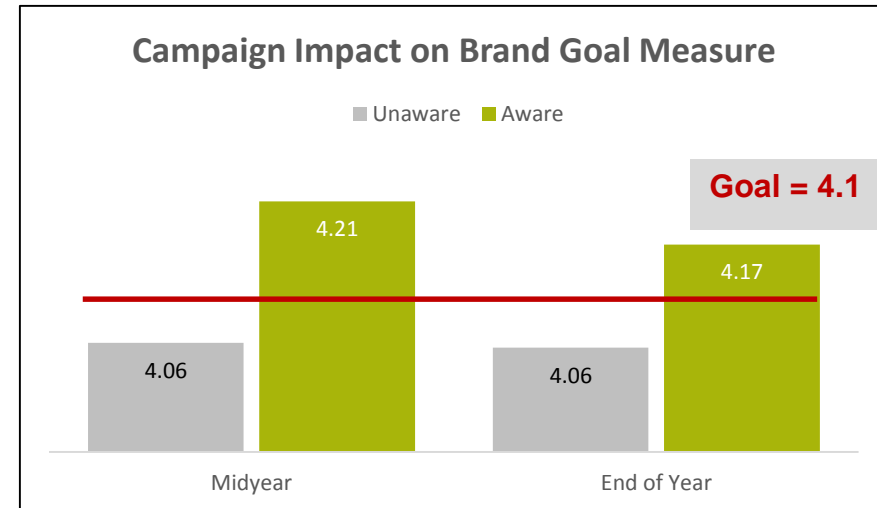
- The spring campaign was nearly as efficient as the FY14/15 spring campaign, and much lower than SMARInsights' benchmark of \$0.35 for similar campaigns (CVB, spot market, no TV).
- As the campaign matures and wears in with travelers, we expect awareness to grow. And although the ads are refreshed with each seasonal campaign, increasing efficiency is a benefit of a consistent *look* to the campaign over time.

	FY13/14 Midyear	FY13/14 End of Year	FY14/15 Midyear	FY14/15 End of Year	FY15/16 Midyear	FY15/16 End of Year
Awareness	25%	25%	21%	31%	21%	33%
Aware HHs	3.5M	3.5M	2.8M	4.5M	3.0M	3.8M
Media spend	\$372,005	\$769,442	\$301,344	\$245,028	\$224,734	\$238,416
Cost per Aware HH	\$0.11	\$0.22	\$0.11	\$0.05	\$0.07	\$0.06

Spending figures are revised from prior reporting to show only spending for current (rather than cumulative) reporting periods.

SPRING ADVERTISING BUILDS ON THE FALL, DRIVING FAMILIARITY AND INTEREST IN VISITING

- Those aware of the ads are more familiar with Monterey and more likely to visit than are those who are not aware of the ads.
- In terms of visit intent, the spring campaign builds on the fall impacts, and those aware of the spring campaign exceeded the 32% visit intent goal.



MORE THAN 100,000 OVERNIGHT MONTEREY TRIPS FROM THE REGIONAL MARKETS ARE ATTRIBUTABLE TO THE ADVERTISING

Total Regional, FY15/16	
Traveling HHs	14,446,391
Awareness	33%
Aware HHs	4,829,515
Incremental Travel %	2.9%
Incremental Traveling HHs	137,986
Overnight %	80%
Incremental Overnights	109,908

Average FY15/16 Monterey Trip Spending	
Lodging/accommodations	\$ 353
Meals/food/groceries	\$ 202
Attractions	\$ 133
Shopping	\$ 139
Entertainment	\$ 36
Transportation	\$ 158
Other	\$ 39
Total	\$ 1,060

- These visitors spent \$1,060 on average while in Monterey, almost identical to last spring's trip spend.
- Generally, spending on attractions and shopping are up, while other categories are consistent or lower than prior measures.

FY15/16 SPRING ROI IS \$489, 45% HIGHER THAN MIDYEAR, WITH JUST 6% HIGHER MEDIA SPENDING

- Higher awareness and higher trip spending, coupled with lower media spending, led to a higher ROI in spring compared to last fall.
- The data indicate that visitation and visitor spending are generally higher in spring than in fall. But MCCVB's more level seasonal spending appears to be keeping the destination in consideration sets and contributing to subsequent travel measures. With a consistent presence in travelers' minds throughout the year, MCCVB is able to achieve positive results more efficiently.

Total Regional	FY13/14		FY14/15		FY15/16	
	Midyear	End of Year	Midyear	End of Year	Midyear	End of Year
Incremental Overnight Traveling HHs	67,315	187,160	93,263	120,195	73,257	109,908
Average Trip Spending	\$1,119	\$1,111	\$1,038	\$1,059	\$1,036	\$1,060
Economic Impact	\$75,325,738	\$216,258,111	\$96,786,586	\$127,290,675	\$75,868,365	\$116,502,719
Media Spend	\$372,005	\$769,442	\$301,344	\$245,028	\$224,734	\$238,416
ROI	\$202	\$281	\$321	\$519	\$338	\$489

FY15/16 ROI CONSTANT DESPITE 15% LESS SPEND

- One challenge MCCVB faces is balancing spring and fall advertising spends, to maximize impacts on visit intent and visitation. As discussed, one of the advantages of retargeted digital advertising is that it reaches those already considering Monterey County as a destination, and its impacts can include length of stay, spending within the destination, engagement with communities and attractions in the county, etc. However, other marketing tools such as PR, print, and broadcast media can be more effective at reaching those who may not already be considering a Monterey County visit.
- Looking at the past fiscal years in totality, the decline in incremental trips year over year may be due to the decreasing impact of paid advertising as MCCVB shifts to a more PR-focused strategy, as paid ads largely reach those who are already familiar with and researching the destination. More directly, however, incremental trips follow spending. Higher ad spending is likely to generate additional travel.
- The table below shows the fall and spring campaign results added for a total fiscal year impact. FY15/16's successes are due to increased awareness and lower spending on paid advertising, which is now spread more evenly throughout the year.

Regional ROI	FY13/14	FY14/15	FY15/16
Incremental Overnight Traveling HHs	254,475	213,458	183,165
Economic Impact	\$291,583,849	\$224,077,261	\$192,371,084
Media Spend	\$1,141,447	\$546,372	\$463,150
ROI	\$255	\$410	\$415

FY15/16 PAID ADVERTISING CAMPAIGN GENERATED MORE THAN 300,000 ROOM NIGHTS

- The lower incidence of hotel/motel stays is a limiting factor, and homesharing/airbnb is a factor in that. For the sake of consistent comparison, paid accommodations are defined as hotel/motel, inn/B&B, or resorts. However, for the current period, including homesharing in this definition increases the share of Monterey County paid lodging stays to 88% and accounts for an additional 35,000 room nights.

Total Regional	FY13/14	FY14/15	FY15/16
Incremental overnight traveling HHs	254,475	213,458	183,165
% staying in paid accommodations	85%	83%	78%
Incremental trips staying in paid accommodations	216,304	177,526	141,996
Avg. # nights on trip	1.4	3.1	2.2
Ad-influenced room nights	306,513	553,720	312,107

EARNED MEDIA & NON-TRADITIONAL PAID MEDIA

- In addition to the print, digital, and social advertising this research typically measures and uses to calculate economic impact and ROI, MCCVB has expanded its campaign to include native advertising and a more robust earned media (public relations) effort.
- As illustrated below, these types of marketing can be blurred in the minds of consumers so understanding their impacts can be challenging. It is for this reason that this report looks at them independently of traditional paid media.

Native ads (paid media)

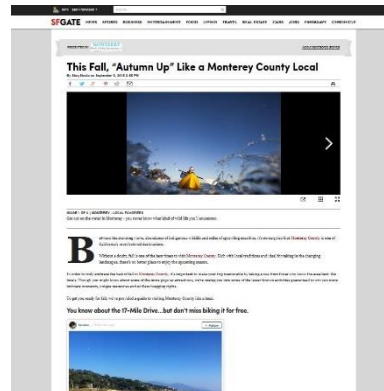
13 Ways To Ruin Your Diet In Monterey

Nothing pairs as well with Monterey's stunning views as its crazy-good food. Head to [Monterey County](#) to take advantage of everything it has to offer.

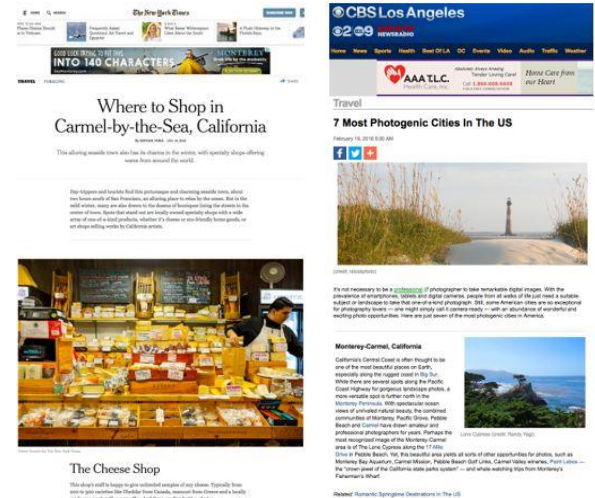
1. Stop by [The Big Sur Roadhouse](#) for SURiously unbelievable Californian-style cuisine featuring locally sourced and organic ingredients:



Whether you want to grab a quick coffee, drink a glass of wine, or sit down for a full meal, you won't be disappointed. Plus, look at its prettiness. LOOK AT IT. *swoon*

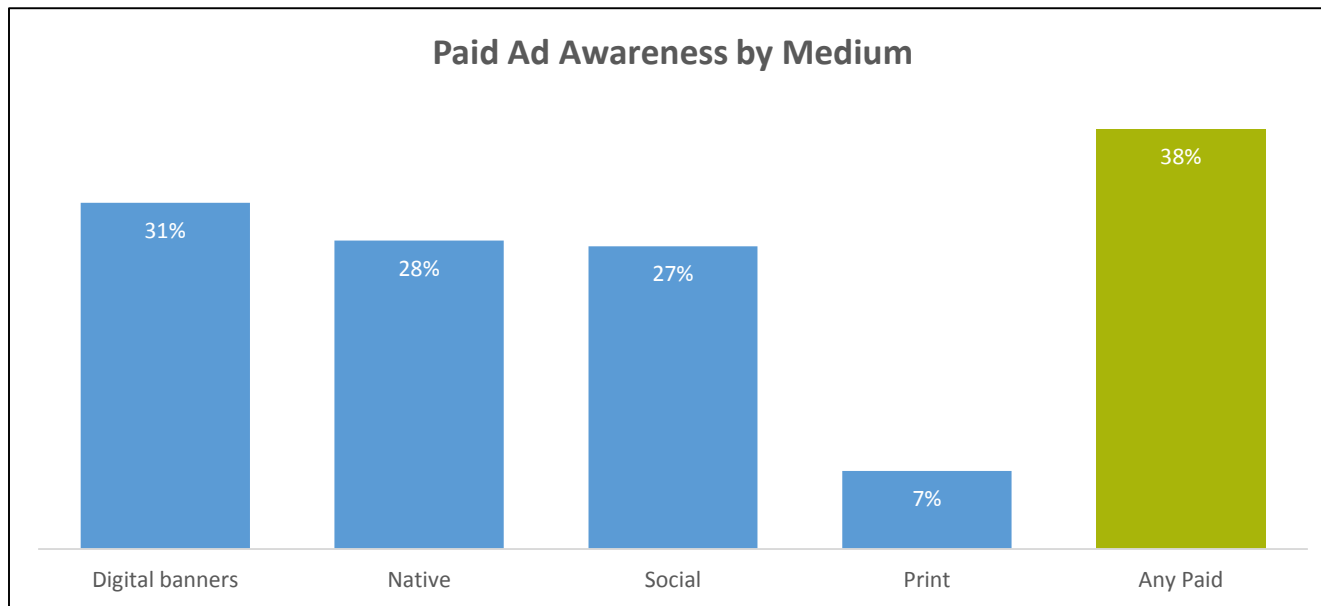


News coverage (earned media)



NATIVE ADS ACHIEVED SIMILAR AWARENESS AS DIGITAL AND SOCIAL

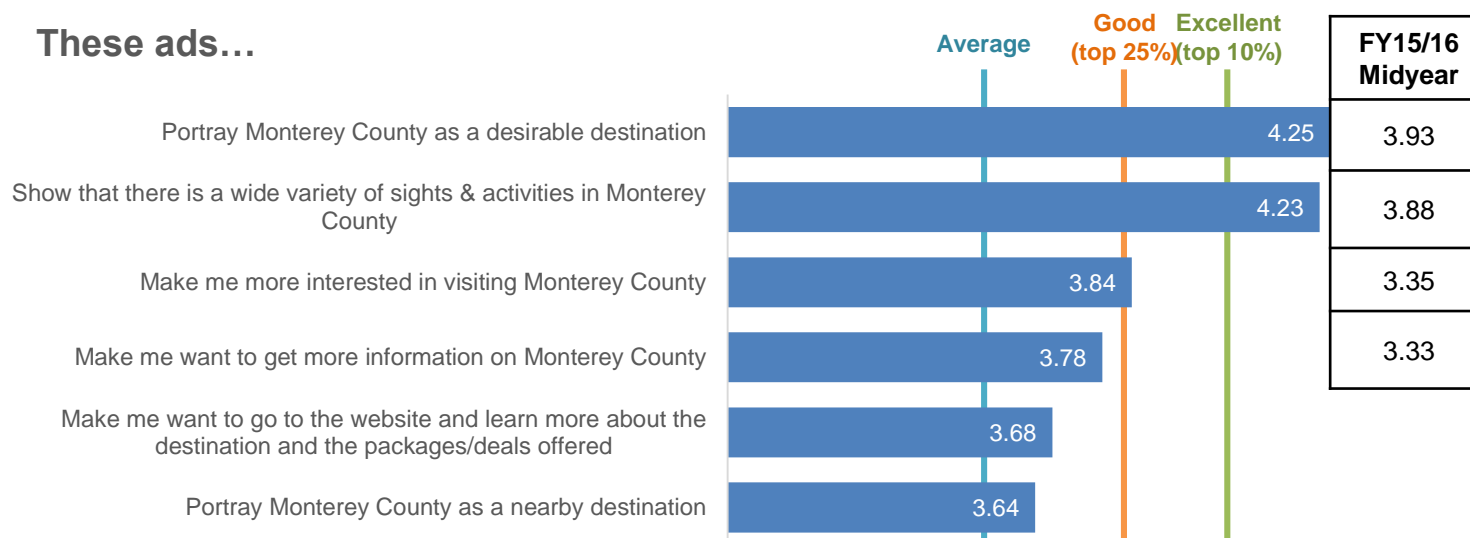
- This research represents the first time native ads have been tested.
- For the sake of comparability with prior measures, the 33% overall awareness reported previously and used for ROI calculations measure omits native ads.
- However, including all forms of paid media, 38% of regional travelers are aware of MCCVB messaging.



PAID ADVERTISING CAMPAIGN, INCLUDING NATIVE ADS, RECEIVES EXCELLENT RATINGS

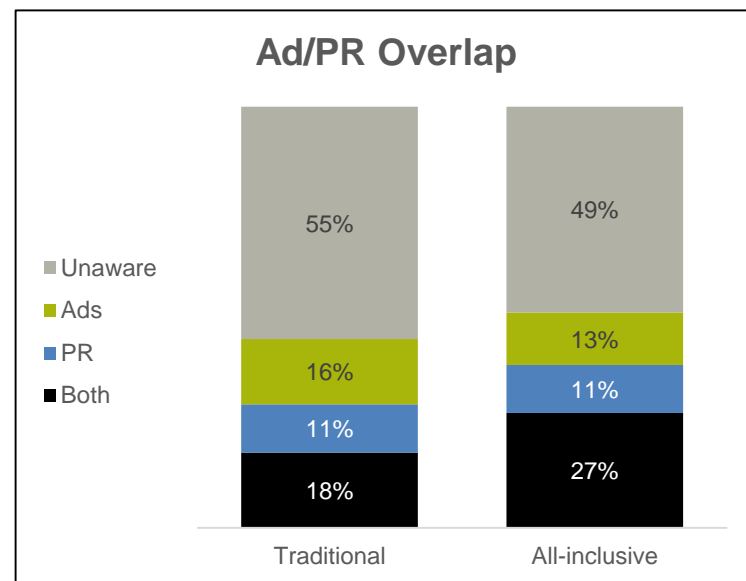
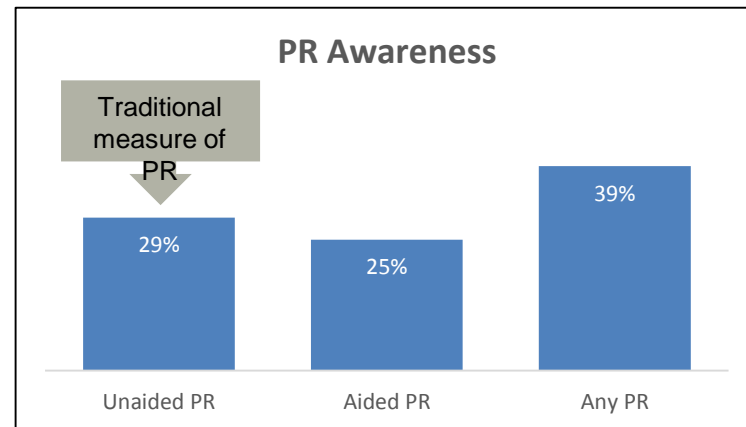
- Directionally the ratings are in line with the fall measure, but they are now much more positive, particularly for portraying Monterey County as a desirable destination and showing the array of sights and activities the destination offers.
- The chief difference between the mid-year and year-end measures are that native ads were included in the most recent measure. The additional information offered and authoritative pseudo-news tone of the native ads clearly balance the campaign's image-rich digital and print ads.

These ads...



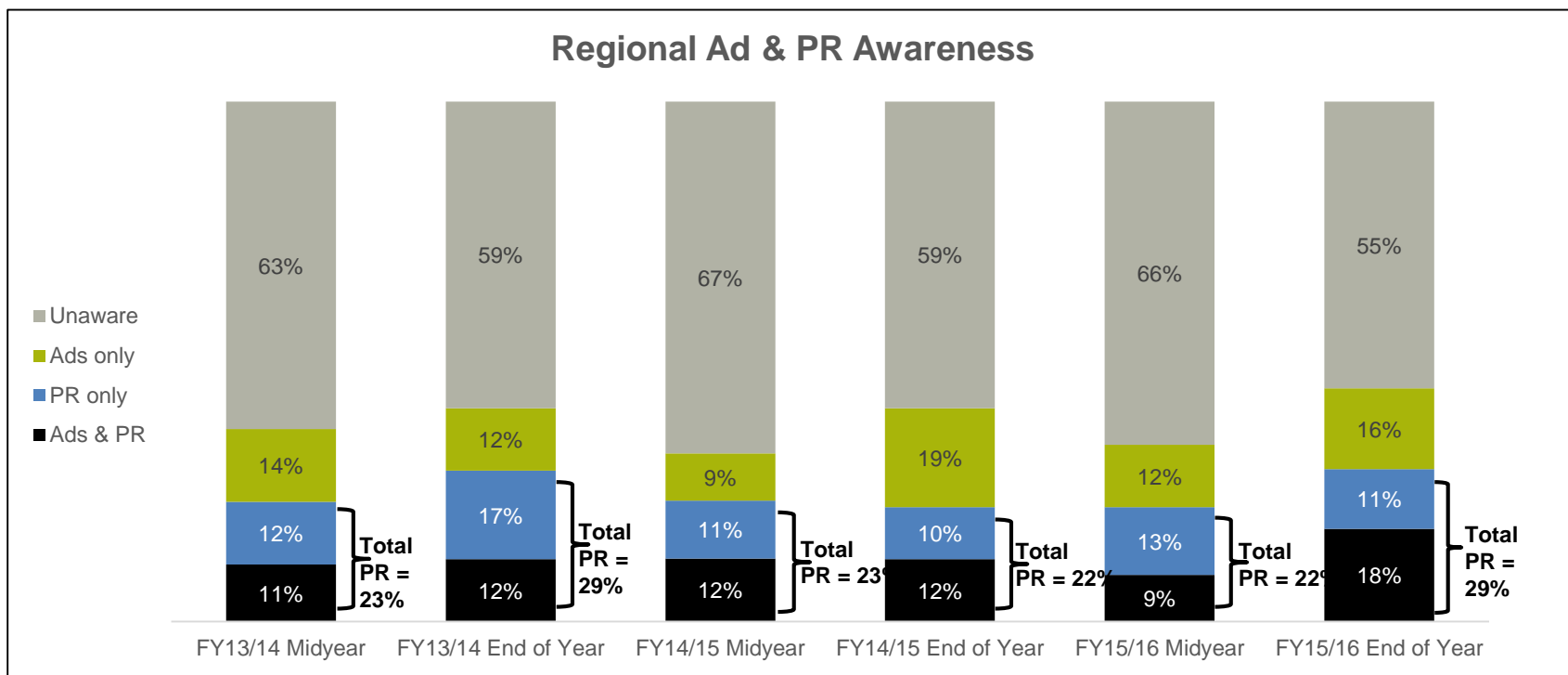
PR AWARENESS IS AT ITS HIGHEST LEVEL TO DATE

- In prior research, PR awareness was measured by asking unaided recall of any news stories, articles, or feature stories about Monterey County or its communities, with a subsequent drill-down by topic. This unaided recall for this wave is at 29%.
- With this wave of research, however, a measure of aided awareness of articles (represented by screen captures of online coverage and images of print stories) was added. That level of awareness is at 25% of regional travelers.
- Together, the total share of travelers with aided or unaided awareness of MCCVB PR is 39%, which is higher than awareness of traditional paid advertising.
- Looking at the overlap of PR and paid advertising using the traditional definitions, total awareness of MCCVB marketing is 45%. Whereas including all paid advertising (digital, print, social, native) and both unaided and aided PR recall, brings total awareness to 51%.



MCCVB'S PR CAMPAIGN REACHED MORE THAN A QUARTER OF REGIONAL TRAVELERS

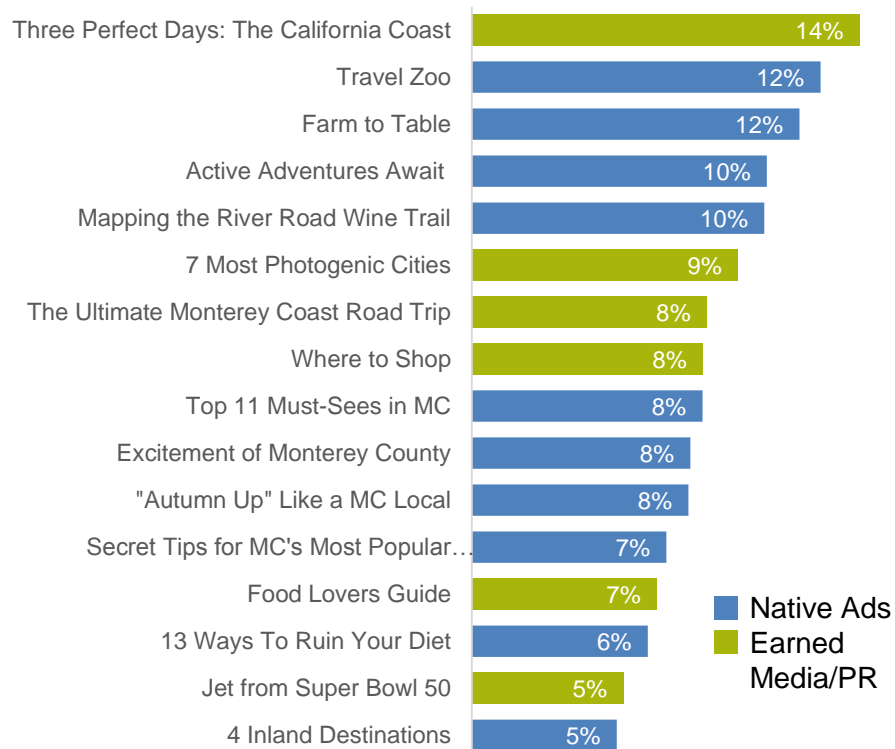
- For the sake of comparability to prior measures, the chart below uses the traditional definition with unaided PR recall. Ad/PR overlap is at an all-time high at 18%.
- Generating ad/PR overlap is important, as we generally see greater impact among those who have seen both.



AWARENESS OF INDIVIDUAL EARNED MEDIA AND NATIVE ADS IS SIMILAR, WITH TRAVEL ITINERARIES THE MOST RECALLED AMONG BOTH TYPES OF MEDIA

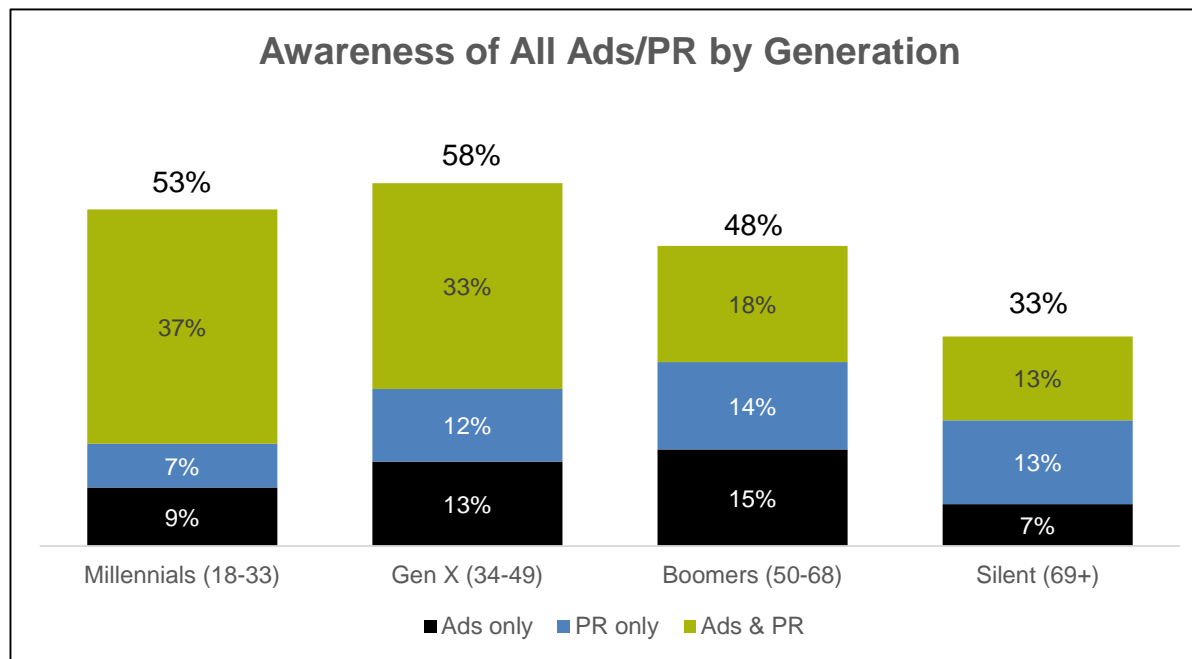
- Besides the list of article topics and headlines we typically measure, with this wave of research we also asked travelers whether they recalled native ads and earned media by showing them screen grabs of online content.
- As the results shown here illustrate, awareness levels are similar for individual articles.
- Awareness of any native ads is 28%, while 25% are aware of at least one earned media topic.

Awareness of Native & Earned Media Pieces



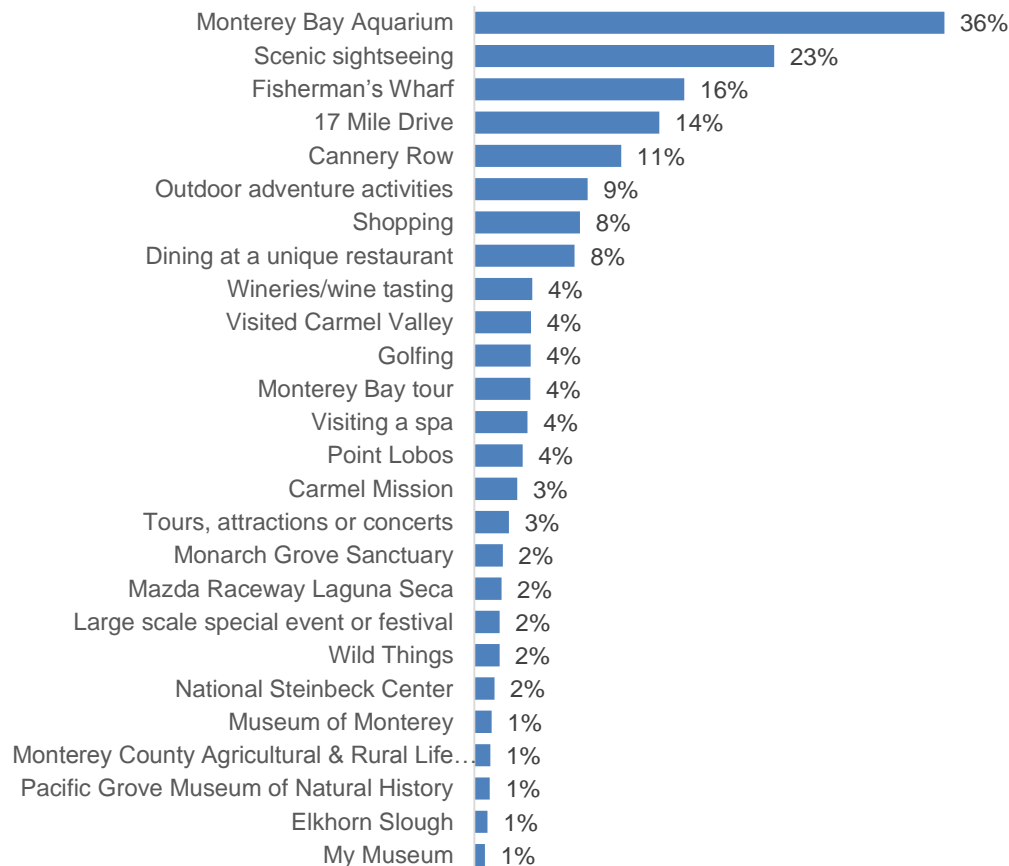
WHILE AD/PR OVERLAP IS GREATEST AMONG MILLENNIALS, OVERALL REACH OF THE CAMPAIGN IS HIGHEST AMONG GENXERS

- Using the broader array of marketing materials, including native ads and aided recall of earned media, more than half of Millennial and GenX regional travelers are aware of the campaign.
- The 53% awareness among Millennials is the same as at the end of the FY14/15 spring campaign.

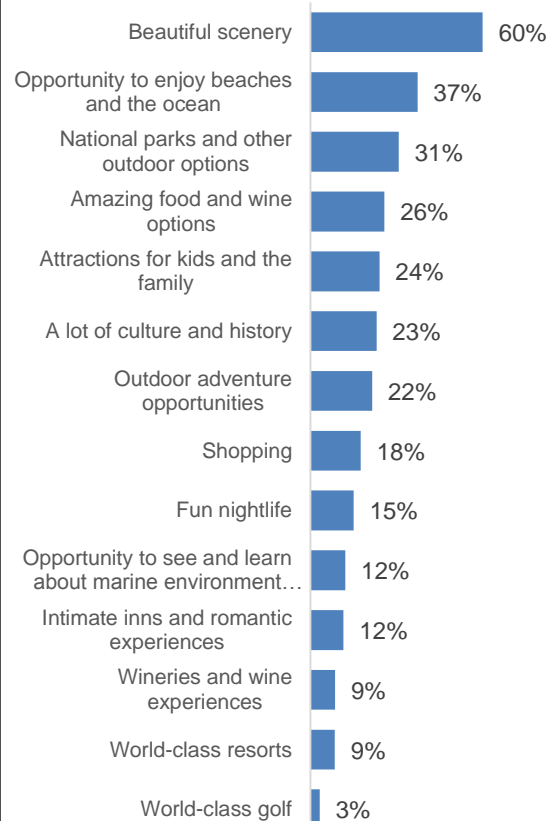


THE TOP MOTIVATORS OF MONTEREY TRAVEL CONTINUE TO BE THE AQUARIUM AND GENERAL SIGHTSEEING

Major Influencers of Monterey Travel

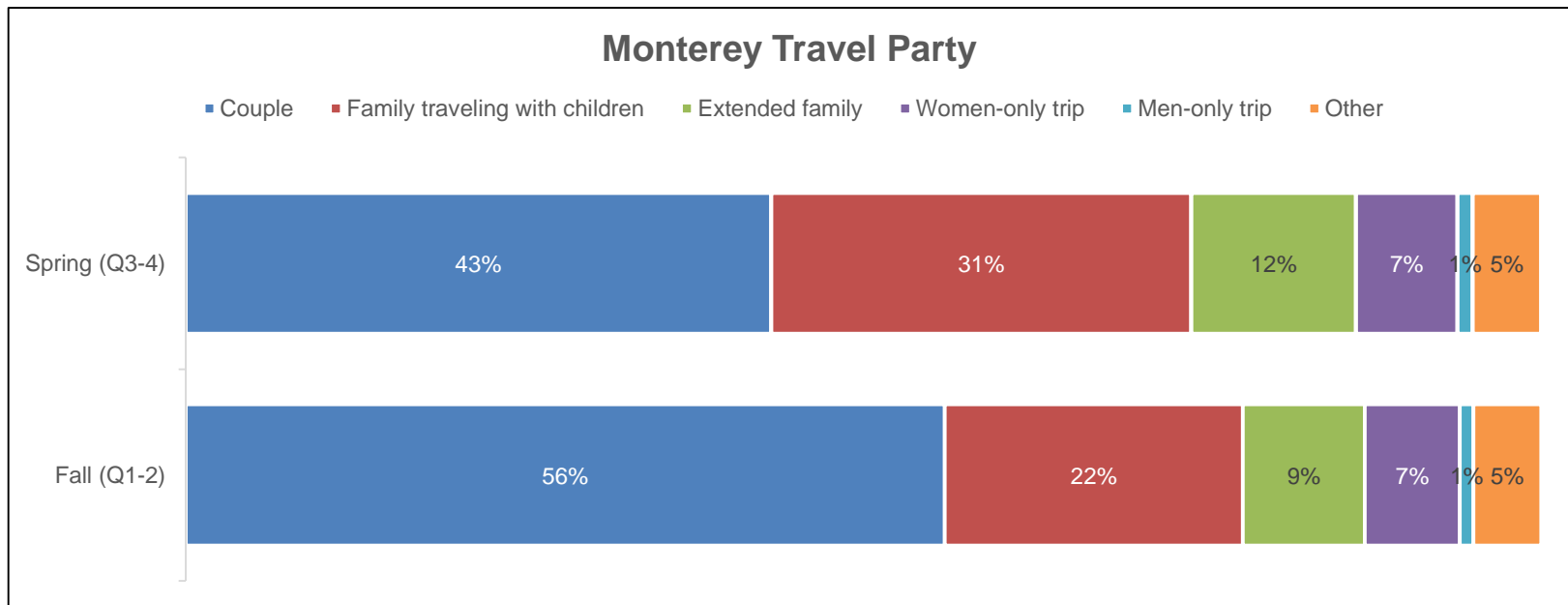


General Travel Motivators



SPRING TRAVEL PARTY COMPOSITION INCLUDES MORE FAMILIES, WHILE COUPLES WERE THE MAJORITY OF VISITORS IN FALL

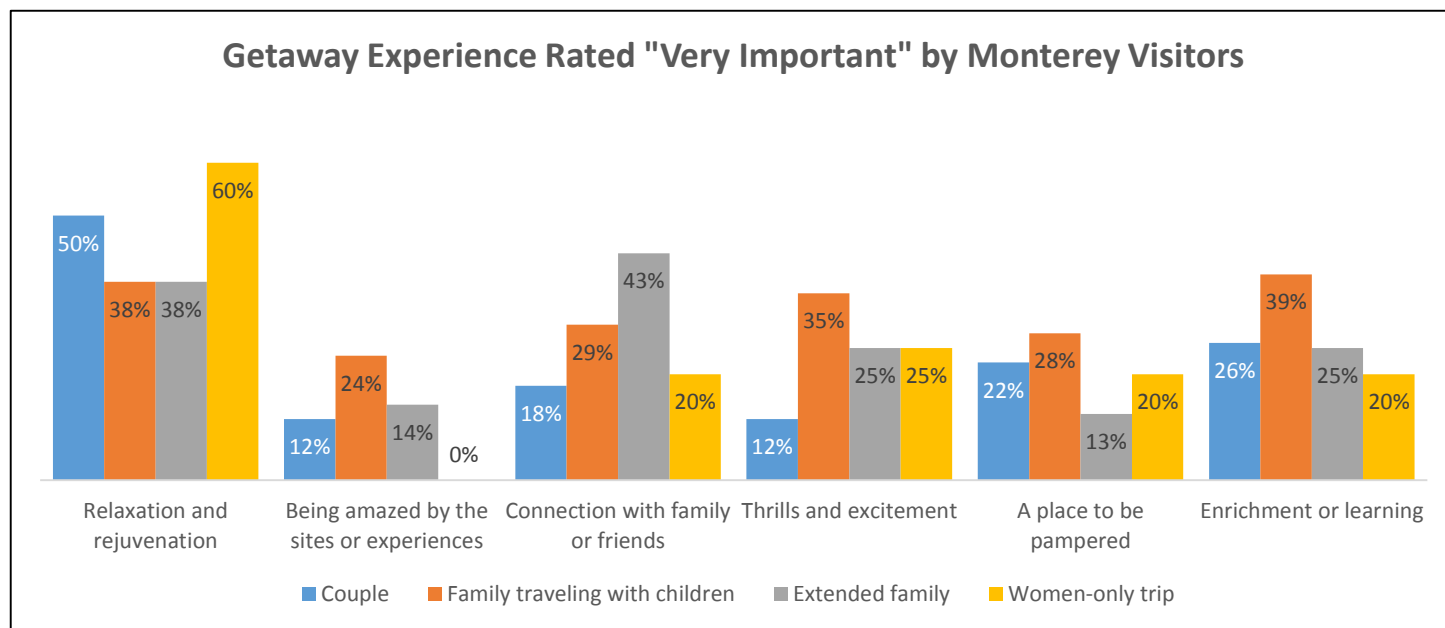
- While this shift in travel party composition appears seasonal, a review of prior measures indicates that family travel is fairly consistently between 20-30% of visitors. Couple travel fluctuation does not follow a seasonal pattern either. This bears monitoring, as it may be impacted by advertising messaging, but could also be due to external factors such as weather or marketing activities undertaken by destinations within the county.



RELAXATION AND REJUVENATION TOP COUPLES' GETAWAY MOTIVATORS, WHILE ENRICHMENT IS KEY FOR FAMILIES

- Overall, the average length of stay for spring visits is 2.3 nights. Extended family and women-only trips tend to be slightly longer.
- This research asked travelers to rate six different types of experiences in terms of how important they are when choosing a destination for a getaway weekend. Among couples and groups of women, relaxation and rejuvenation is the most important experience.
- Family travelers' top experience is enrichment/learning, but these travelers are notable for wanting a lot of experiences – in fact, more than a third of family travelers want enrichment, relaxation, and thrills.
- Not surprisingly, extended family travel is about connecting with one another.

Length of Stay	
Couple	2.3
Family traveling with children	2.2
Extended family	2.8
Women-only trip	3.0



Visitor Profile Study, Q1 Wave

A background image showing two people riding horses on a beach at sunset. The sun is low on the horizon, creating a warm, golden glow. The riders are silhouetted against the bright sky. The horses are in motion, and the overall scene is peaceful and scenic.

MONTEREY
Grab life by the moments:

RESEARCH OVERVIEW

This report presents interim findings of a comprehensive visitor profile development study conducted by Destination Analysts, Inc. on behalf of the Monterey County Convention & Visitors Bureau. The data presented here comes from an intercept survey of Monterey County visitors at locations throughout the city, as well as from a self-administered survey distributed to guests at Monterey County lodging properties.

This preliminary report presents the top-line survey data collected from these surveys in the first three quarters of 2016. Note that data presented in this interim report is unweighted. At the end of this research, data will be weighted based on the destination's overall visitor mix.



Important Note: This report represents only the first three quarters of the overall data we will collect from Monterey visitors throughout the year—and thus sample sizes for some visitor segments' are small—so should be considered informational rather than directional at this point.

RESEARCH OBJECTIVES

The overarching goal of this survey-based research is to create an in-depth profile of the Monterey County visitor, including developing the following marketing intelligence:

- Reason for visiting Monterey County
- Trip characteristics
- Travel party profiles
- In-market spending metrics
- Travel planning resources used
- Activities in Monterey County
- Things liked and disliked about Monterey County, and
- Demographic and geographic profiles

In addition to developing a comprehensive, multi-segment Monterey County visitor profile, data from this research is also going to be used as inputs to estimate the economic impact of tourism to Monterey County.

METHODOLOGY

The research includes two separate yet carefully integrated survey collection techniques. Destination Analysts, working closely with the Monterey County Convention and Visitors Bureau, prepared a base survey questionnaire that was fielded in two ways: (1) an intercept survey of visitors to Monterey County collected at locations around the area, and (2) a self-administered survey of Monterey County hotel guests distributed at their hotel.

This report presents data collected through June 2016 of this annual project, from both the Visitor Intercept Survey as well as the Hotel Guest Survey. In total, 1024 completed surveys were collected from three different key groups of visitors:

1. Visitors staying in a hotel in Monterey County (hotel guests)
2. Visitors staying in the private home of a friend or relative in Monterey County (VFRs)
3. Day-trippers to Monterey County (regional residents coming to the county for the day as well as those on trips staying overnight elsewhere in the surrounding areas)

The survey also collected data from visitors staying overnight in Monterey County in private home rentals (i.e. rented through AirBnB). At the end of the project, all data collected in the intercept survey and hotel guest survey will be weighted to reflect the actual proportion of hotel guests, VFRs, and day-trip visitors to Monterey County. In this interim report, the un-weighted data as collected in the field is presented.

VISITOR SURVEY INTERCEPT OVERVIEW

An intercept survey was conducted of visitors to Monterey County. Destination Analysts' surveyors worked at locations around Monterey County and randomly intercepted visitors. In this effort, only visitors to the county were interviewed—those who reside in the county or were in the area for routine business purposes were not interviewed.

During the first three quarters of 2016, surveys were collected at the following locations:

- Cannery Row
- Fisherman's Wharf
- Lover's Point
- Carmel Plaza
- Carmel Valley Village
- Pacific Grove
- Monterey Marriott
- Portola Hotel
- Intercontinental the Clement Monterey
- Monterey Plaza Hotel



Destination Analysts' staff surveying visitors at Carmel Plaza

LODGING GUEST SURVEY OVERVIEW

The Monterey County Lodging Guest Survey was a self-administered survey conducted at twenty-eight (28) participating Monterey County lodging properties. The survey was distributed to all guests at participating properties over a two-week period during each quarter of 2016. During the year and throughout each distribution period, guests were given the survey on the day of their departure, either in their room with their express checkout receipt or by the front desk staff when they check out. In the first three quarters, the following lodging properties participated in this research:



Portola Hotel & Spa. Digital image. www.PortolaHotel.com. Web.

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

Detailed Findings

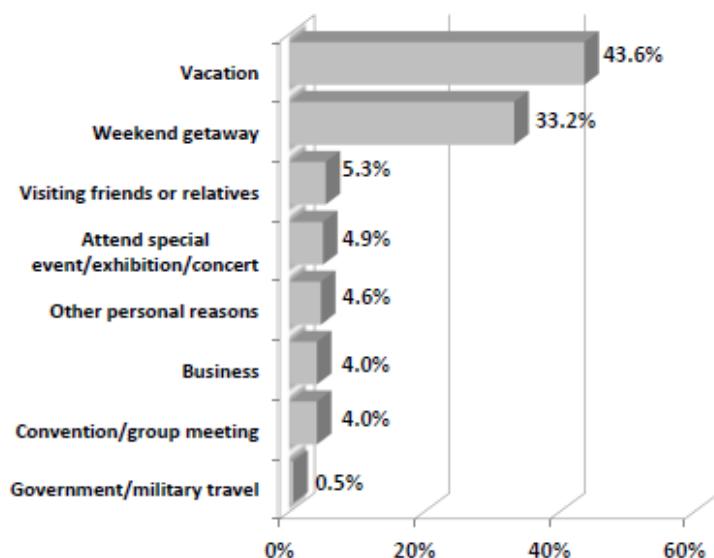


MONTEREY
Grab life by the moments:

PRIMARY REASON FOR A MONTEREY COUNTY TRIP

In the first three quarters of 2016, over three-quarters of Monterey County visitors surveyed came to the destination for leisure purposes (76.7%). This includes visitors traveling to Monterey County for a vacation (43.6%) or weekend getaway (33.2%). Additionally, 5.3 percent of visitors surveyed were in the area to visit friends or relatives and 8.5 percent were in the destination for business, convention/group meeting or government travel.

Chart 1: Primary Reason for Monterey County Trip



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

Detail by Type of Visitor

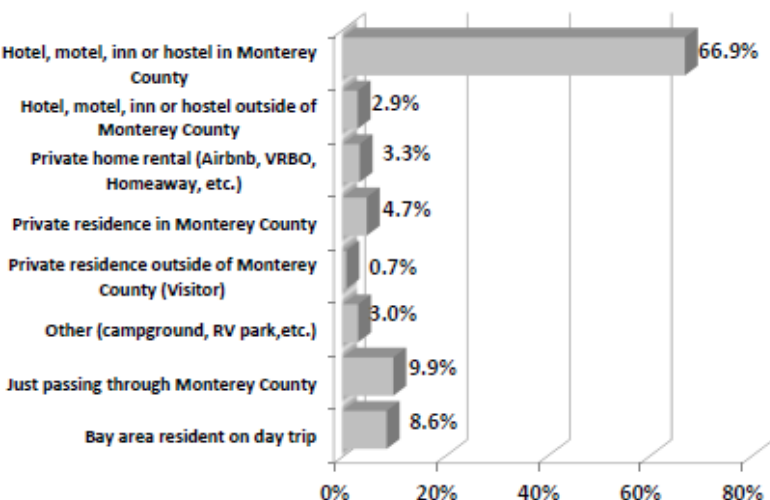
	Hotel	VFR	Day Trip
Vacation	44.6%	25.5%	42.7%
Weekend getaway	32.3%	23.4%	40.0%
Visiting friends or relatives	3.8%	34.0%	3.6%
Attend special event	5.6%	2.1%	2.7%
Other personal reasons	2.4%	12.8%	8.2%
Convention/group meeting	5.8%	2.1%	0.5%
Business	4.9%	0.0%	2.3%
Government/military travel	0.6%	0.0%	0.0%
Base	657	47	220

Base: All respondents. 1001 completed surveys.

PLACE OF STAY

Commercial lodging in Monterey was the most common place of stay during the first three quarters of 2016. 66.9 percent of visitors surveyed stayed overnight in a Monterey County hotel, motel, inn or hostel. 5.4 percent stayed in the private residence of a friend or family member and 3.3 percent were in a private home rental. In total, 81.5 percent of visitors surveyed stayed overnight in Monterey County. The remaining 18.5 percent were either “just passing through” (9.9%) or were Bay Area residents visiting Monterey County on a day-trip (8.6%).

Chart 2: Place of Stay



Question: Where are you staying on this trip to Monterey? (Select one)

Detail by Type of Visitor

	Hotel	VFR	Day Trip
Hotel, motel, inn or hostel in Monterey County	100.0%	--	--
Hotel, motel, inn or hostel outside of Monterey County	--	--	13.1%
Private home rental (Airbnb, VRBO, Homeaway, etc.)	--	--	--
Private residence in Monterey County	--	100.0%	--
Private residence outside of Monterey County (Visitor)	--	--	3.2%
Other (campground, RV park, etc.)	--	--	--
Just passing through Monterey County	--	--	44.8%
Bay area resident on day trip	--	--	38.9%
Base	669	47	221

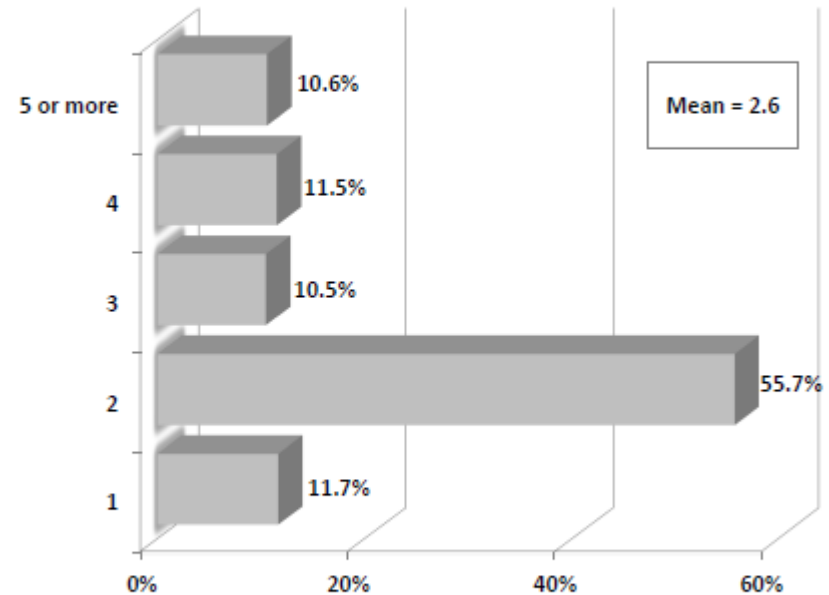
Base: All respondents. 1000 completed surveys.

PAID LODGING GUESTS: NUMBER OF PEOPLE IN HOTEL ROOMS

Through the first three quarters of 2016, the average Monterey County paid accommodations visitor had 2.6 occupants in their room or rental. Monterey County visitors who stayed in a hotel, motel, inn or private home rental were asked how many people, including themselves, stayed in their room or rental property. The greatest proportion of these overnight visitors stayed with just one other person (55.7%).

Question: Including yourself, how many people stayed in your hotel room/private home rental?

Chart 3: Number of People in Hotel Room

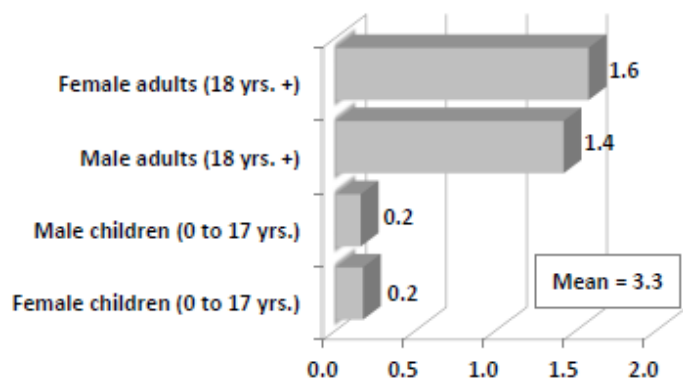


Base: Respondents staying overnight in a hotel or private home rental. 858 completed surveys.

TRAVEL PARTY COMPARISON

The typical travel party to Monterey County was comprised of **3.3 persons**. Through the first three quarters of 2016, this average travel party included 1.6 female and 1.4 male adults. Nearly one-in-five travel parties included children under age 18 (17.8%). When looking at differences by types of visitors, day trip visitors had the largest travel party average (3.7 persons) as well as the largest share of travel parties with children (27.2%).

Chart 4: Travel Party Composition



Detail by Type of Visitor

	Hotel	VFR	Day Trip
Female adults	1.54	1.36	1.71
Male adults	1.44	0.91	1.43
Male children	0.12	0.17	0.24
Female children	0.14	0.15	0.29
Mean travel party	3.2	2.6	3.7
Base	649	47	217

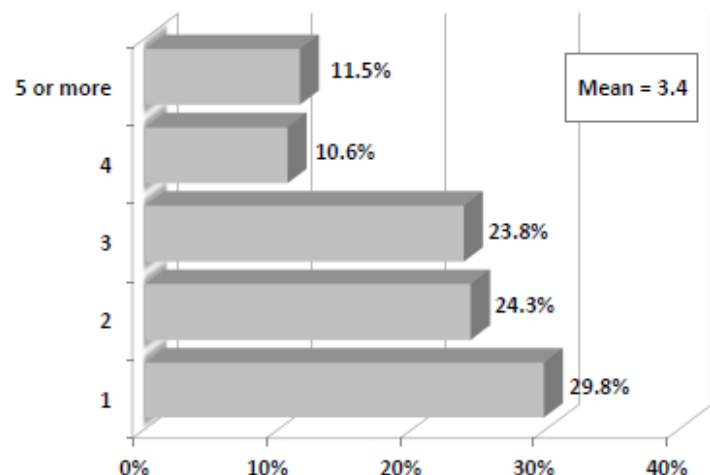
Question: How many people of each type were in your immediate traveling party, including yourself?

Base: All respondents. 989 completed surveys.

DAYS IN MONTEREY COUNTY

During the first three quarters of 2016, the average length of stay in Monterey County visitor was 3.4 days. Visitors staying in private homes (VFRs) in the county had the longest length of stay with an average of 7.0 days. Those staying in Monterey County hotels spent an average of 3.2 days in the area.

Chart 5: Days in Monterey County



Detail by Type of Visitor

	Hotel	VFR	Day Trip
5 or more	11.3%	26.1%	2.5%
4	13.8%	8.7%	1.0%
3	29.6%	30.4%	3.5%
2	32.0%	21.7%	4.0%
1	13.3%	13.0%	89.0%
Mean	3.2	7.0	1.7
Base	653	46	200

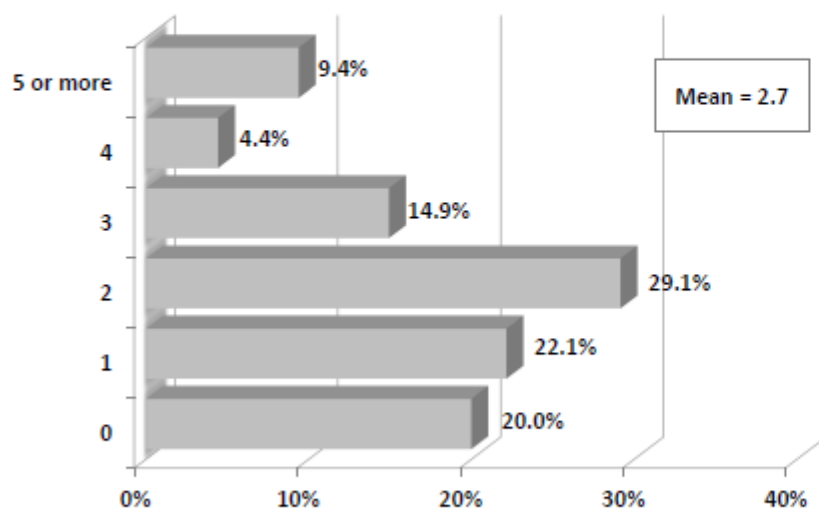
Question: How many total days and nights did you stay in Monterey County?

Base: All respondents. 971 completed surveys.

NIGHTS IN MONTEREY COUNTY

The average Monterey County visitor surveyed spent **2.7 nights** in the county during their trip. Visitors staying in private homes (VFRs) in the county had the longest length of stay with an average of 6.3 nights while lodging guests spent an average of 2.6 nights in the area.

Chart 6: Nights in Monterey County



Detail by Type of Visitor

	Hotel	VFR	Day Trip
5 or more	9.2%	19.6%	--
4	5.4%	8.7%	--
3	18.7%	15.2%	--
2	37.4%	32.6%	--
1	27.7%	19.6%	--
0	1.7%	4.3%	--
Mean	2.6	6.3	--
Base	653	46	--

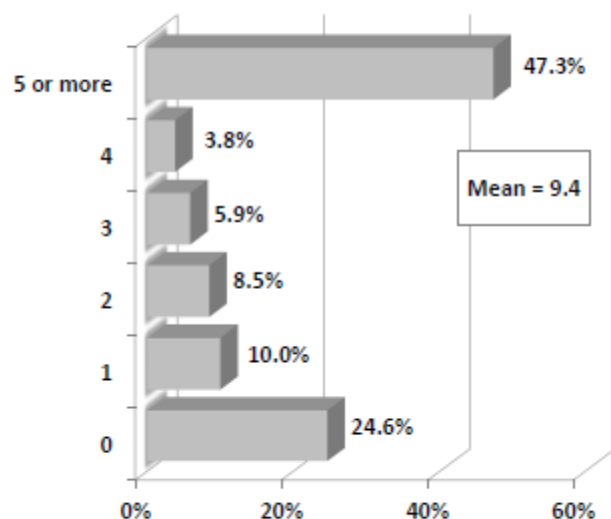
Question: How many total days and nights did you stay in Monterey County?

Base: All respondents. 971 completed surveys.

PAST VISITATION TO MONTEREY COUNTY

Monterey County attracts a substantial number of repeat visitors. Through the first three quarters of 2016, 75.4 percent of visitors surveyed reported having previously visited Monterey County. The average visitor had made 9.4 previous visits to Monterey County. Day-trip visitors report the highest number of previous visits (11.7 times on average). Hotel guests are the likeliest to be first-time visitors.

Chart 7: Past Visitation to Monterey County



Detail by Type of Visitor

	Hotel	VFR	Day Trip
5 or more	45.1%	55.0%	54.2%
4	4.3%	2.5%	2.1%
3	5.6%	5.0%	5.7%
2	8.4%	12.5%	6.3%
1	10.3%	12.5%	6.3%
0	26.2%	12.5%	25.5%
Mean	8.5	8.2	11.7
Base	621	40	192

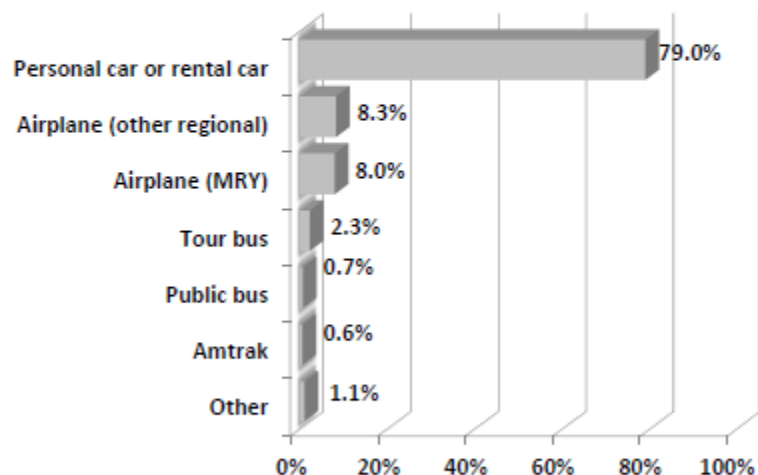
Question: Prior to this visit, how many times have you been to Monterey County?

Base: All respondents. 922 completed surveys.

METHOD OF ARRIVAL

While a variety of methods are used to arrive into Monterey County, automobile is the most popular mode of transit (79.0%). In total, 16.3 percent arrived to the area via airplane—including 8.0 percent who flew into the Monterey Regional Airport.

Chart 8: Method of Arrival



Detail by Type of Visitor

	Hotel	VFR	Day Trip
Personal car or rental car	78.1%	70.2%	85.3%
Airplane (other regional)	9.9%	6.4%	2.8%
Airplane (MRY)	8.7%	19.1%	4.1%
Tour bus	1.1%	0.0%	6.4%
Public bus	0.9%	0.0%	0.5%
Amtrak	0.8%	2.1%	0.5%
Other	0.6%	2.1%	0.5%
Base	657	47	218

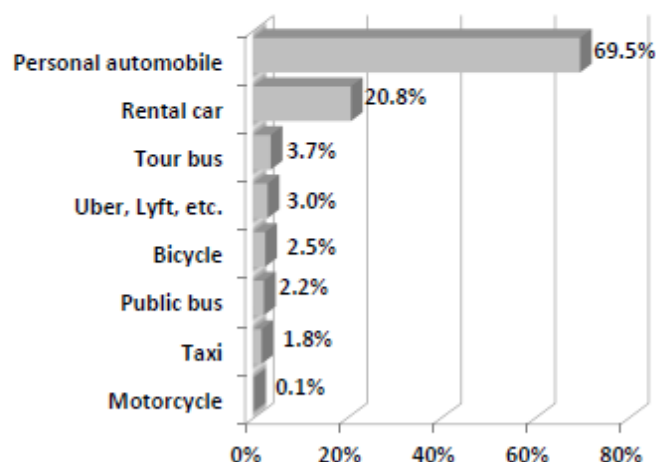
Question: How did you arrive in the Monterey County area? (Select one)

Base: All respondents. 999 completed surveys.

MODES OF TRANSPORTATION

Seven-in-ten visitors surveyed used a personal automobile to get around Monterey County (69.5%). Additionally, 20.8 percent used a rental car and 3.0 percent used a ride sharing service such as Uber or Lyft. 1.8 percent of visitors used a taxi. Hotel & VFR travelers were more likely to utilize different types of transportation when compared to day trip visitors, who primarily used a personal automobile.

Chart 9: Modes of Transportation



Question: Which modes of transportation did you use while in Monterey County? (Select all that apply)

Detail by Type of Visitor

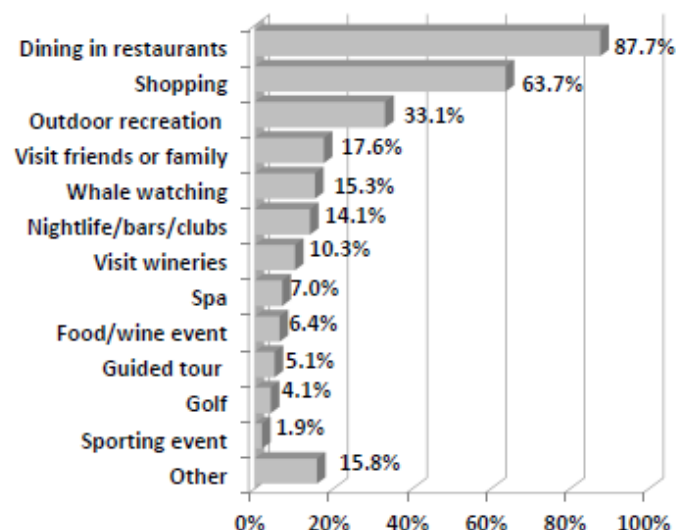
	Hotel	VFR	Day Trip
Personal automobile	66.4%	72.3%	79.6%
Rental car	25.6%	19.1%	8.1%
Tour bus	2.4%	0.0%	9.0%
Uber, Lyft, etc.	3.6%	8.5%	0.0%
Bicycle	2.7%	8.5%	0.5%
Public bus	2.5%	4.3%	1.4%
Taxi	2.5%	2.1%	0.0%
Motorcycle	0.1%	0.0%	0.0%
Base	669	47	221

Base: All respondents. 1024 completed surveys.

ACTIVITIES IN MONTEREY COUNTY

Dining in restaurants was the top visitor activity in Monterey County (87.7%) to date in 2016, followed by shopping (63.7%) and outdoor recreation (33.1%). Additionally, visiting friends or family (17.6%), whale watching (15.3%) and nightlife (14.1%) were also popular activities visitors participated in while in the destination.

Chart 11: Activities in Monterey County



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

Detail by Type of Visitor

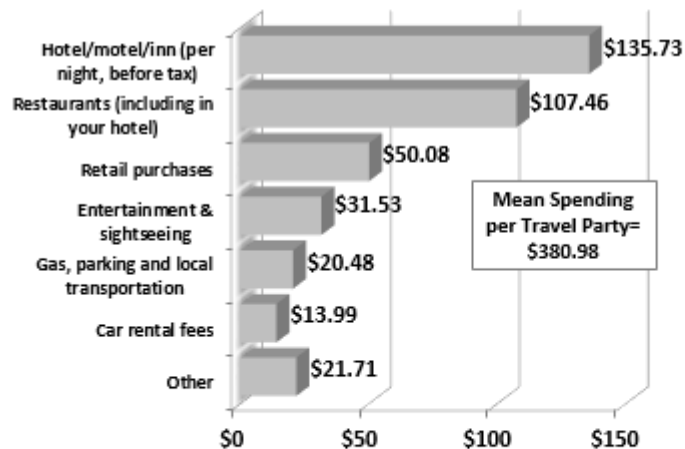
	Hotel	VFR	Day Trip
Dining in restaurants	90.3%	87.2%	85.1%
Shopping	65.7%	63.8%	58.8%
Outdoor recreation	36.2%	40.4%	22.2%
Visit friends or family	15.9%	70.2%	9.5%
Whale watching	15.6%	31.9%	11.3%
Nightlife/bars/clubs	16.6%	23.4%	4.1%
Visit wineries	10.9%	19.1%	5.4%
Spa	8.7%	10.6%	1.8%
Food/wine event	6.9%	10.6%	3.2%
Guided tour	5.4%	6.4%	4.1%
Golf	4.6%	6.4%	0.9%
Sporting event	1.5%	4.3%	0.5%
Other	15.9%	10.6%	19.0%
Base	668	47	221

Base: All respondents. 1023 completed surveys.

SPENDING PER DAY, PER TRAVEL PARTY

The average Monterey County travel party spent **\$380.98 per day during their trip**. The bulk of this spending is attributed to accommodations (\$135.73—note: this is the average lodging spend across all visitors including those who did not stay in paid accommodations) and restaurants (\$107.46). Retail store purchases (\$50.08) and entertainment and sightseeing (\$31.53) were also top expenditures. Lodging guests spent an average of \$189.01 on their accommodations in Monterey County and also had the highest average per day/travel party spending compared to other visitor types (\$465.06 vs. \$338.97 for VFRs and \$218.85 for day-trippers).

Chart 12: Spending Per Day, Per Travel Party



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

Detail by Type of Visitor

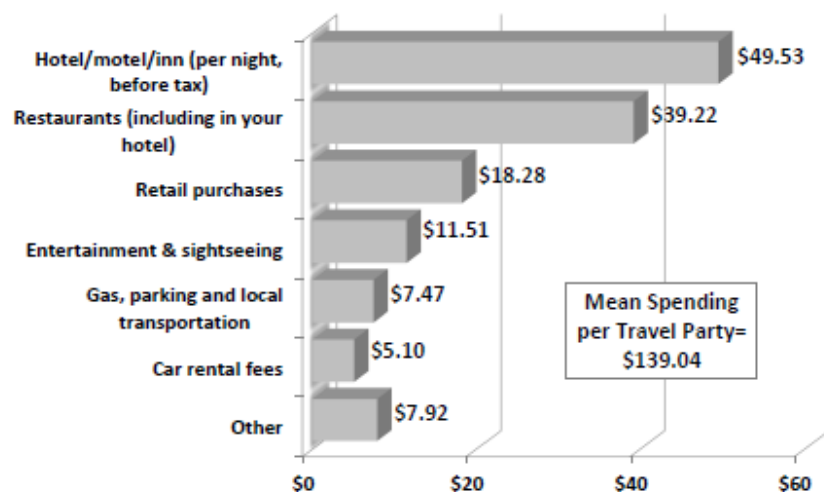
	Hotel	VFR	Day Trip
Hotel/motel/inn (per night, before tax)	\$ 189.01	\$ 40.56	\$ 21.18
Restaurants (including in your hotel)	\$ 123.36	\$ 105.57	\$ 69.97
Retail purchases	\$ 53.06	\$ 78.67	\$ 34.26
Entertainment & sightseeing	\$ 34.08	\$ 42.39	\$ 23.15
Gas, parking and transit	\$ 21.26	\$ 25.78	\$ 18.43
Car rental fees	\$ 17.32	\$ 18.33	\$ 3.18
Other	\$ 26.98	\$ 27.68	\$ 48.69
Mean spending (per travel party)	\$ 465.06	\$ 338.97	\$ 218.85
Base	632	45	213

Base: All respondents. 967 completed surveys.

SPENDING PER DAY, PER PERSON

The reported daily spending of \$380.98 covered an average of 2.8 travelers. **Thus, it is estimated that the typical Monterey County visitor represented \$139.04 in daily spending in the county.**

Chart 13: Spending Per Day, Per Person



Question: These expenses fully covered how many people (including yourself)?

Detail by Type of Visitor

	Hotel	VFR	Day Trip
Hotel/motel/inn (per night, before tax)	\$75.64	\$16.93	\$6.06
Restaurants (including in your hotel)	\$53.48	\$44.07	\$20.00
Retail purchases	\$24.70	\$32.84	\$9.79
Entertainment & sightseeing	\$16.24	\$17.70	\$6.62
Gas, parking and local transportation	\$7.07	\$10.76	\$5.27
Car rental fees	\$10.94	\$7.65	\$0.91
Other	\$8.94	\$7.35	\$8.01
Mean spending (per person)	\$139.04	\$137.31	\$56.66
Mean # of people covered by spending	2.5	2.4	3.5
Base	631	45	213

Base: All respondents. 966 completed surveys.

IMPORTANT FACTORS TO DESTINATION DECISION

A large majority of visitors reported that **scenic beauty** was the most important factor in their decision to travel to Monterey County (66.9%). Other top factors important to visitors' decision to visit the county include Monterey County's overall **ambiance** (48.0%), **weather** (44.2%) and **restaurants/food culture** (36.8%). Three-in-ten visitors cited the area's **attractions** as a significant factor to their ultimate decision to visit Monterey County (30.7%).

Chart 14: Important Factors to Destination Decision



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

Detail by Type of Visitor

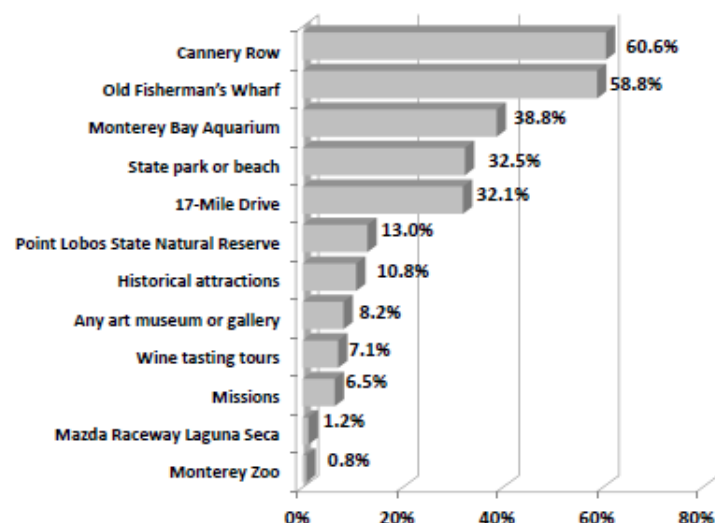
	Hotel	VFR	Day Trip
Scenic beauty	67.8%	61.7%	67.9%
Overall ambiance and atmosphere	50.0%	46.8%	44.8%
Weather	42.2%	53.2%	51.1%
Restaurants, cuisine, food culture	35.9%	36.2%	42.1%
Area attractions	30.7%	14.9%	35.3%
Outdoor recreational opportunities	26.2%	36.2%	22.6%
Friends or family in the area	12.6%	66.0%	6.8%
Shopping opportunities	13.2%	17.0%	13.1%
Special event(s) and/or festival(s)	13.6%	6.4%	4.5%
Good hotel rate	13.9%	0.0%	0.5%
Historical attributes	9.6%	14.9%	1.8%
Monterey County is family-friendly	7.9%	4.3%	5.9%
Wine	7.3%	19.1%	4.1%
Lifelong desire to visit	6.4%	4.3%	2.7%
Golf	3.7%	4.3%	1.4%
Good deal on airfare	2.7%	0.0%	0.5%
Base	668	47	221

Base: All respondents. 1023 completed surveys.

ATTRACTIONS VISITED

The most frequented Monterey County attractions by visitors to date were Cannery Row (60.6%) and Old Fisherman's Wharf (58.8%). Presented with a list of twelve Monterey County attractions, respondents identified those which they visited during their trip. In addition to Cannery Row and Old Fisherman's Wharf, the Monterey Bay Aquarium (38.8%) and visiting state parks or beaches (32.5%) and were also frequented by more than one-third of visitors.

Chart 15: Attractions Visited



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

Detail by Type of Visitor

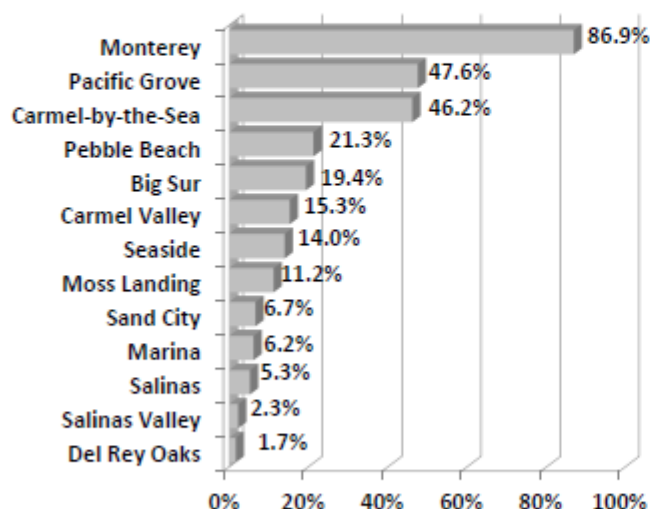
	Hotel	VFR	Day Trip
Cannery Row	60.8%	61.7%	62.9%
Old Fisherman's Wharf	60.5%	76.6%	54.3%
Monterey Bay Aquarium	39.7%	40.4%	36.7%
State park or beach	35.3%	44.7%	19.0%
17-Mile Drive	37.1%	36.2%	17.6%
Point Lobos State Natural Reserve	13.8%	23.4%	3.6%
Historical attractions	12.1%	23.4%	2.7%
Any art museum or gallery	10.0%	19.1%	1.4%
Wine tasting tours	7.9%	12.8%	3.2%
Missions	7.3%	8.5%	1.4%
Mazda Raceway Laguna Seca	1.3%	0.0%	0.0%
Monterey Zoo	0.9%	2.1%	0.0%
Base	668	47	221

Base: All respondents. 1023 completed surveys.

MONTEREY COUNTY AREAS VISITED

Nearly nine-in-ten visitors surveyed went to the city of Monterey during their visit to the county. Over 50 percent of visitors also reported visiting Pacific Grove (47.6%) and Carmel-by-the-Sea (46.2%).

Chart 16: Monterey County Areas Visited



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

Detail by Type of Visitor

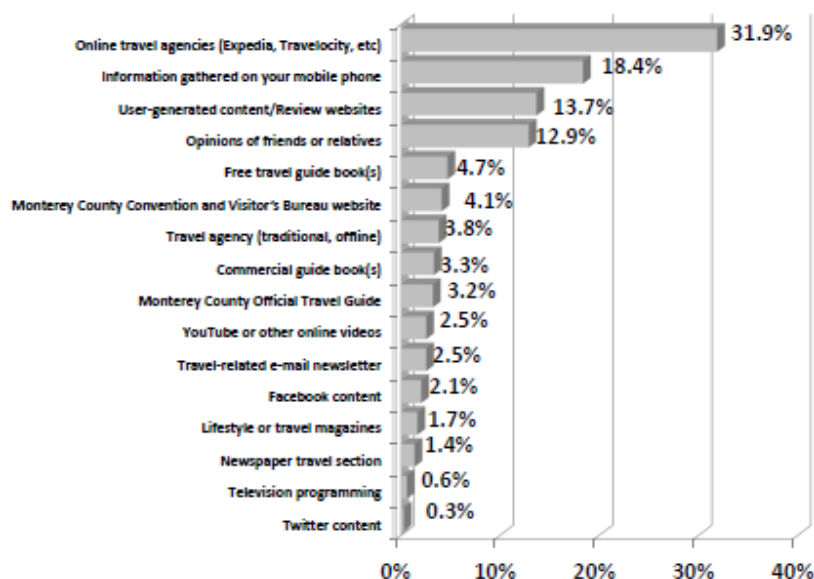
	Hotel	VFR	Day Trip
Monterey	87.4%	85.1%	89.0%
Pacific Grove	51.5%	57.4%	32.0%
Carmel-by-the-Sea	49.3%	48.9%	31.1%
Pebble Beach	25.1%	23.4%	10.5%
Big Sur	21.4%	25.5%	8.7%
Carmel Valley	17.5%	25.5%	5.5%
Seaside	15.8%	21.3%	6.4%
Moss Landing	9.6%	21.3%	7.8%
Sand City	6.1%	14.9%	3.7%
Marina	5.7%	10.6%	3.7%
Salinas	5.1%	17.0%	1.8%
Salinas Valley	2.6%	10.6%	0.5%
Del Rey Oaks	2.0%	6.4%	0.5%
Base	653	47	219

Base: All respondents. 1005 completed surveys.

RESOURCES USED BEFORE ARRIVAL

Over a quarter of visitors surveyed used online travel agencies to plan their trip prior to arriving in Monterey County (31.9%). Other resources visitors most relied upon pre-arrival were gathering information on their mobile phone (18.4%), user generated content/review websites (13.7%) and opinions of friends or relatives (12.9%).

Chart 17: Resources Used Before Arrival



Base: All respondents. 1023 completed surveys.

Detail by Type of Visitor

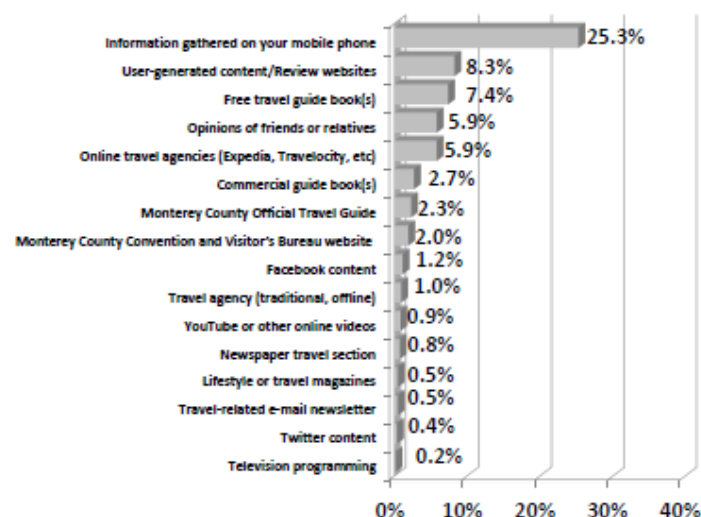
	Hotel	VFR	Day Trip
Online travel agencies (Expedia, Travelocity, etc)	38.3%	23.4%	18.6%
Information gathered on your mobile phone	19.8%	21.3%	14.5%
User-generated content/Review websites	16.5%	6.4%	5.0%
Opinions of friends or relatives	12.7%	27.7%	10.4%
Free travel guide book(s)	6.0%	10.6%	0.5%
Monterey County Convention and Visitor's Bureau website	5.5%	0.0%	1.4%
Travel agency (traditional, offline)	4.2%	2.1%	4.1%
Commercial guide book(s)	4.0%	2.1%	0.5%
Monterey County Official Travel Guide	3.6%	6.4%	1.8%
Travel-related e-mail newsletter	3.7%	0.0%	0.5%
YouTube or other online videos	3.0%	4.3%	1.4%
Facebook content	2.7%	2.1%	0.5%
Lifestyle or travel magazines	1.9%	2.1%	0.0%
Newspaper travel section	1.8%	2.1%	0.0%
Television programming	0.7%	0.0%	0.0%
Twitter content	0.4%	0.0%	0.0%
Base	668	47	221

Question: Which of the following resources did you use to plan your Monterey County trip BEFORE ARRIVING and which did you use WHILE IN THE COUNTY?

RESOURCES USED IN-MARKET

The most utilized resource visitors turned to for trip planning while in Monterey County was their mobile phone (25.3%). Additionally, 8.3 percent used user generated content/review sites, 7.4 percent used free travel guides and 5.9 percent used the opinions of friends and relatives while in-market. Of the MCCVB marketing assets tested, 2.6 percent used SeeMonterey.com and 2.0 percent report using the Monterey County Official Travel Guide during their trip.

Chart 18: Resources Used In-Market



Base: All respondents. 1023 completed surveys.

Detail by Type of Visitor

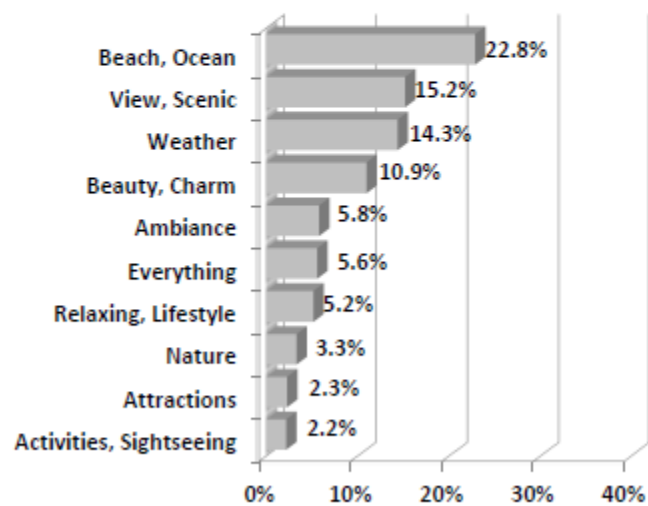
	Hotel	VFR	Day Trip
Information gathered on your mobile phone	25.7%	34.0%	21.7%
User-generated content/Review websites	10.0%	6.4%	3.6%
Free travel guide book(s)	9.6%	10.6%	0.9%
Online travel agencies (Expedia, Travelocity, etc)	7.6%	4.3%	1.4%
Opinions of friends or relatives	4.8%	19.1%	5.0%
Commercial guide book(s)	3.3%	0.0%	0.5%
Monterey County Official Travel Guide	2.8%	4.3%	0.5%
Monterey County Convention and Visitor's Bureau website	2.8%	0.0%	0.0%
Facebook content	1.3%	0.0%	0.0%
Travel agency (traditional, offline)	1.0%	0.0%	1.4%
YouTube or other online videos	1.0%	2.1%	0.5%
Newspaper travel section	0.9%	2.1%	0.5%
Travel-related e-mail newsletter	0.7%	0.0%	0.0%
Lifestyle or travel magazines	0.7%	0.0%	0.0%
Twitter content	0.4%	0.0%	0.0%
Television programming	0.3%	0.0%	0.0%
Base	668	47	221

Question: Which of the following resources did you use to plan your Monterey County trip BEFORE ARRIVING and which did you use WHILE IN THE COUNTY?

MOST LIKED ASPECTS OF MONTEREY COUNTY

Overall, Monterey County’s beaches and scenic beauty are the most liked aspects of the destination. In an open-ended question, visitors were asked what they liked most about Monterey County. The top most common responses are shown in the chart below. Amongst these, beach/ocean (22.8%), scenic beauty (15.2%), the area’s weather (14.3%), and charming atmosphere (10.9%) were the most frequently reported.

Chart 19: Most Liked Aspects of Monterey County (Top aspects)



Question: What do you like most about Monterey County?

Detail by Type of Visitor

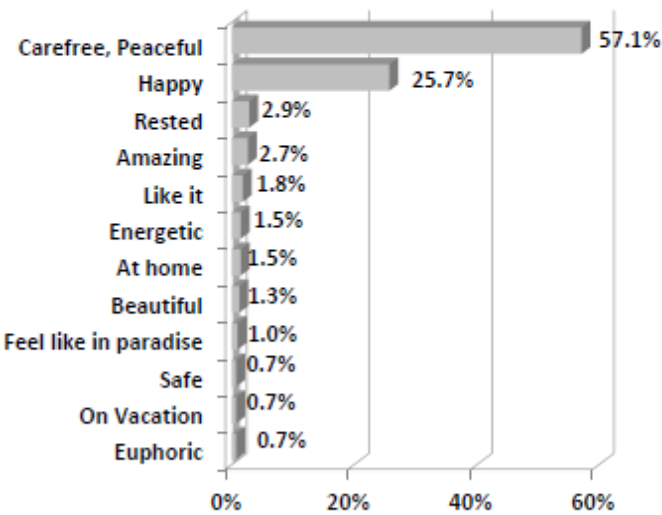
	Hotel	VFR	Day Trip
Beach, Ocean	22.2%	13.0%	24.5%
View, Scenic	16.3%	8.7%	16.2%
Weather	14.4%	17.4%	13.9%
Beauty, Charm	11.1%	15.2%	9.7%
Ambiance	5.7%	2.2%	6.5%
Everything	5.9%	4.3%	6.0%
Relaxing, Lifestyle	4.3%	10.9%	4.6%
Nature	3.8%	6.5%	1.4%
Attractions	2.7%	0.0%	0.9%
Activities, Sightseeing	2.1%	4.3%	1.9%
Base	631	46	216

Base: All respondents. 969 completed surveys.

FEELING IN MONTEREY COUNTY

The Monterey County experience makes its visitors feel “carefree” and “peaceful.” In an open-ended question, respondents were asked to state how they feel when in Monterey County. 57.1 percent of visitors surveyed reported a sentiment of being carefree and at peace. The other top emotion visitors have while in Monterey County is simply “happy” (25.7%).

Chart 21: Feeling in Monterey County (Top feelings)



Detail by Type of Visitor

	Hotel	VFR	Day Trip
Carefree, Peaceful	59.8%	51.1%	52.1%
Happy	23.4%	26.7%	30.7%
Rested	2.8%	4.4%	3.3%
Amazing	2.6%	2.2%	3.3%
Like it	1.8%	0.0%	1.9%
Energetic	1.8%	0.0%	0.9%
At home	1.6%	0.0%	0.9%
Beautiful	1.2%	2.2%	1.9%
Feel like I'm in paradise	0.8%	2.2%	0.9%
Safe	0.5%	4.4%	0.9%
On Vacation	0.8%	0.0%	0.5%
Euphoric	0.7%	4.4%	0.0%
Base	607	45	215

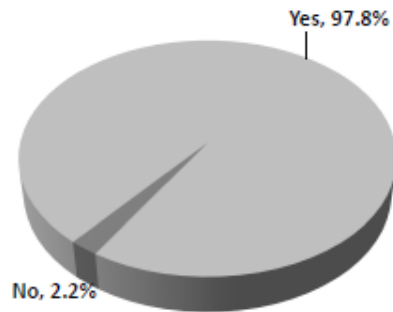
Question: In a few words, how do you feel when you are in Monterey County?

Base: All respondents. 940 completed surveys.

RETURN TO MONTEREY COUNTY

Monterey County appears to provide a very satisfactory visitor experience. Nearly all visitors surveyed, 97.8 percent, reported that they would return to Monterey County.

Chart 22: Return to Monterey County



Question: Would you return to Monterey County?

Detail by Type of Visitor

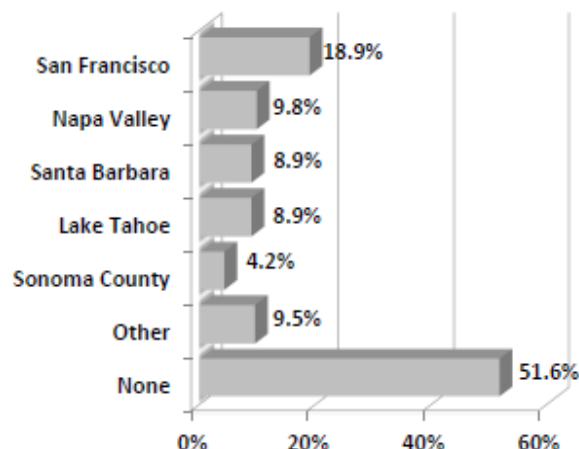
	Hotel	VFR	Day Trip
Yes	97.4%	100.0%	98.1%
No	2.6%	0.0%	1.9%
Base	622	43	211

Base: All respondents. 953 completed surveys.

OTHER DESTINATIONS CONSIDERED

During the first three quarters of 2016, approximately half of visitors surveyed did not consider any major competing destinations when they made the decision to visit Monterey County (51.6%). Visitors surveyed were presented a list of competitive destinations and asked which they also considered before arriving at the decision to visit Monterey County. For visitors who were considering another destination before ultimately deciding to travel to Monterey County, San Francisco was the most common at 18.9 percent. The other top competitive destination considered was Napa Valley at 9.4 percent.

Chart 23: Other Destinations Considered



Question: Which of the following did you also consider visiting for this trip, before choosing Monterey County? (Select all that apply)

Detail by Type of Visitor

	Hotel	VFR	Day Trip
San Francisco	21.3%	8.5%	16.9%
Napa Valley	11.9%	4.3%	5.9%
Santa Barbara	11.9%	6.4%	2.7%
Lake Tahoe	11.3%	4.3%	5.5%
Sonoma County	5.2%	2.1%	2.7%
Other	9.2%	4.3%	12.3%
None	48.6%	66.0%	55.7%
Base	629	47	219

Base: All respondents. 981 completed surveys.

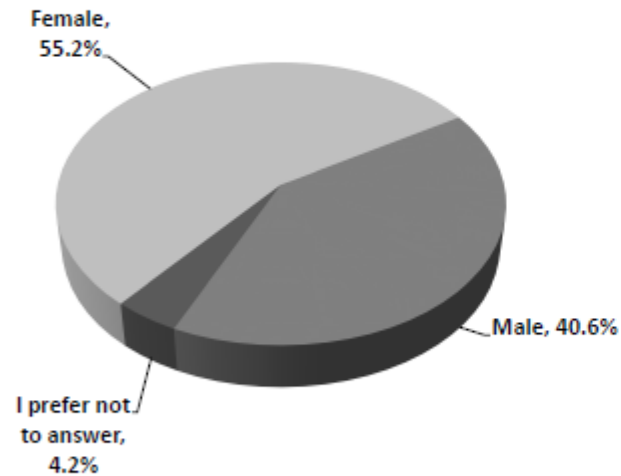
Demographics

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GENDER

In the first three quarters of 2016, Monterey County visitors surveyed skew slightly female (55.2%). 40.6 percent of the survey sample are male.

Chart 24: Gender



Question: What is your gender? (Select one)

Detail by Type of Visitor

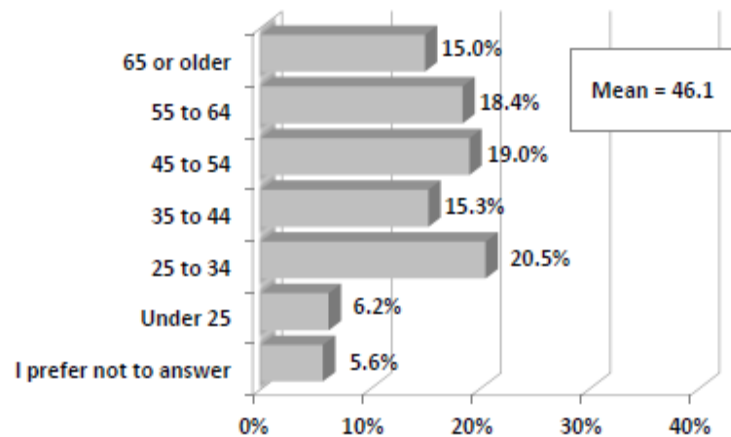
	Hotel	VFR	Day Trip
Female	56.4%	63.3%	56.7%
Male	42.6%	33.3%	39.2%
I prefer not to answer	1.0%	3.3%	4.2%
Base	617	46	209

Base: All respondents. 949 completed surveys.

AGE

The average age of Monterey County visitors surveyed is 46.1 years. Over a quarter of visitors surveyed are Millennials. Approximately a third are GenX and a third are Boomers.

Chart 25: Age



Question: What is your age? (Select one)

Detail by Type of Visitor

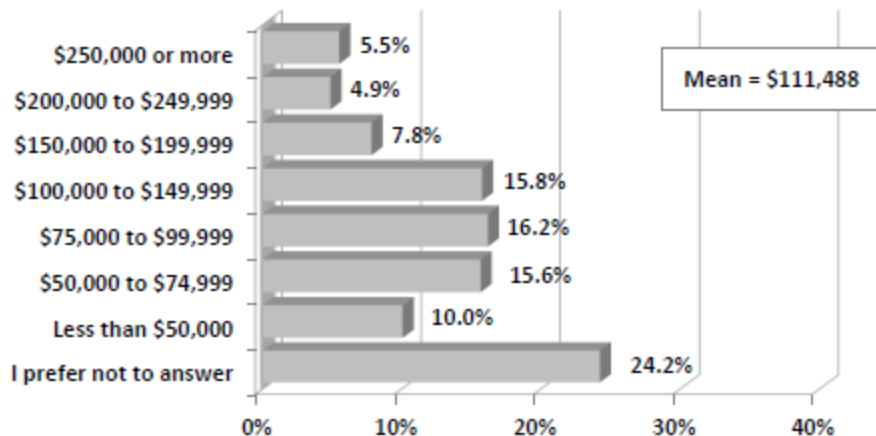
	Hotel	VFR	Day Trip
65 or older	17.1%	8.9%	10.0%
55 to 64	20.2%	15.6%	12.4%
45 to 54	20.0%	13.3%	17.7%
35 to 44	12.5%	26.7%	20.6%
25 to 34	19.2%	20.0%	24.9%
Under 25	5.8%	8.9%	6.7%
I prefer not to answer	5.3%	6.7%	7.7%
Mean	46.6	41.4	43.4
Base	419	29	119

Base: All respondents. 956 completed surveys.

ANNUAL HOUSEHOLD INCOME

Monterey County's visitors are an affluent group. In the first three quarters of 2016, 33.9 percent of Monterey County visitors have an annual household income of \$100,000 or more, with the average annual household income being \$111,488.

Chart 26: Annual Household Income



Detail by Type of Visitor

	Hotel	VFR	Day Trip
\$250,000 or more	6.0%	2.2%	4.8%
\$200,000 to \$249,999	4.7%	6.5%	3.8%
\$150,000 to \$199,999	9.1%	8.7%	4.8%
\$100,000 to \$149,999	18.3%	10.9%	8.7%
\$75,000 to \$99,999	16.5%	10.9%	14.9%
\$50,000 to \$74,999	14.6%	21.7%	18.3%
Less than \$50,000	8.1%	21.7%	12.5%
I prefer not to answer	22.7%	17.4%	32.2%
Mean	\$116,352	\$93,750	\$99,556
Base	617	46	208

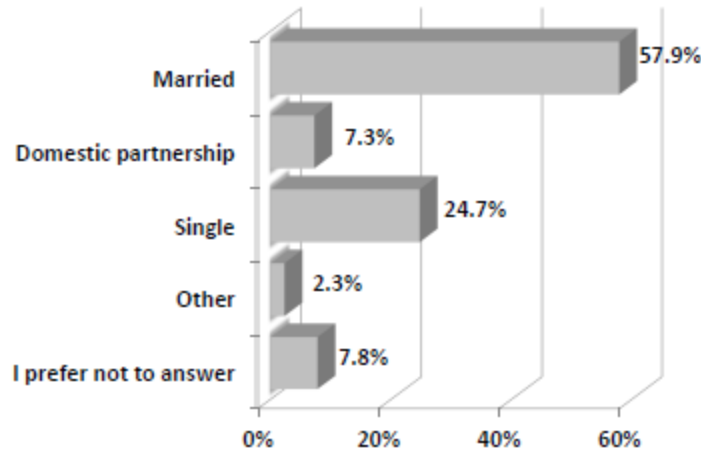
Question: Which best describes the combined annual income of all members of your household? (Select one)

Base: All respondents. 946 completed surveys.

MARITAL STATUS

Two-thirds of visitors surveyed are married (57.9%) or partnered (7.3%), while one-in-four visitors are single (24.7%).

Chart 27: Marital Status



Question: Which of the following best describes your current marital status? (Select one)

Detail by Type of Visitor

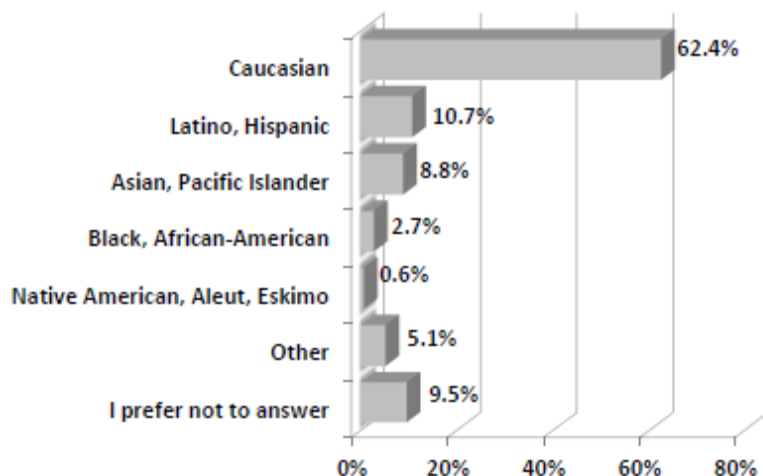
	Hotel	VFR	Day Trip
Married	60.3%	45.7%	53.4%
Domestic partnership	7.1%	10.9%	6.7%
Single	22.8%	32.6%	28.8%
Other	2.1%	4.3%	1.9%
I prefer not to answer	7.8%	6.5%	9.1%
Base	619	46	208

Base: All respondents. 950 completed surveys.

ETHNICITY

Three-in-ten Monterey County visitors surveyed identify as a non-Caucasian ethnicity (28.0%). 10.7 percent are Latino, Hispanic, 8.8 percent identify as Asian, Pacific Islander and 2.7 percent are Black, African-American. This is followed by Native American, Aleut, Eskimo (0.6%) and other (5.1%).

Chart 29: Ethnicity



Question: Which best describes your ethnicity? (Select one)

Detail by Type of Visitor

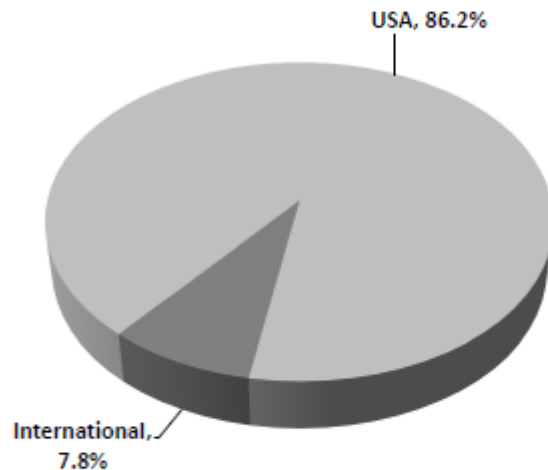
	Hotel	VFR	Day Trip
Caucasian	66.9%	56.5%	49.5%
Latino, Hispanic	7.6%	17.4%	19.7%
Asian, Pacific Islander	8.8%	4.3%	11.5%
Black, African-American	2.3%	2.2%	3.8%
Native American, Aleut, Eskimo	0.5%	4.3%	0.5%
Other	5.1%	6.5%	3.8%
I prefer not to answer	8.8%	8.7%	11.1%
Base	622	46	208

Base: All respondents. 953 completed surveys.

POINT OF ORIGIN: COUNTRY

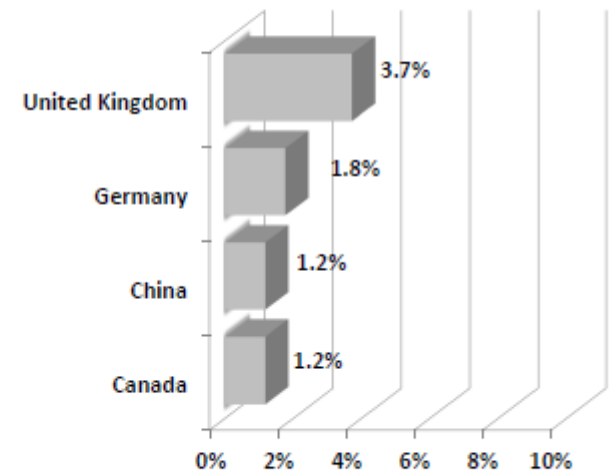
In the first three quarters of 2016, international residents accounted for 7.8 percent of visitors surveyed. United Kingdom residents represent the largest percentage of the international travelers to Monterey County (3.7%) followed by Germany (1.8%).

Chart 30: Point of Origin—Domestic vs. International



Question: What is your zip/postal code?

Chart 31: Point of Origin—Country (International Visitors)

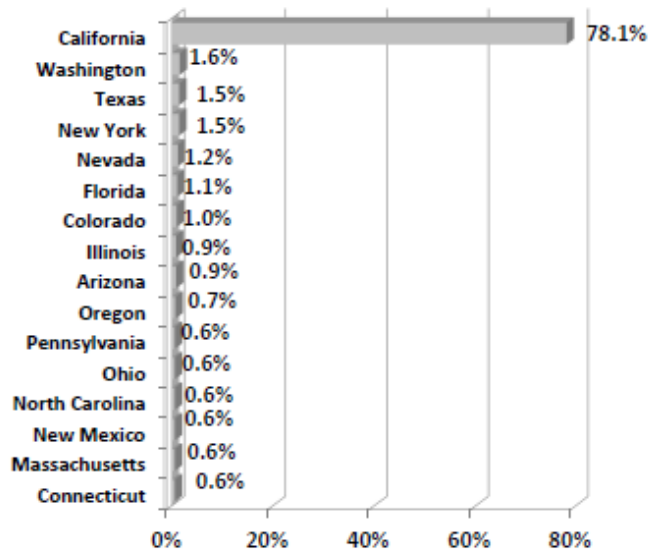


Base: All respondents. 513 completed surveys.

POINT OF ORIGIN: STATE

A large majority of domestic visitors surveyed reside within the state of California (78.1%). Washington (1.6%), Texas (1.5%) and New York (1.5%) were the top out of state markets.

Chart 32: Point of Origin—State



Question: What is your zip/postal code?

Detail by Type of Visitor

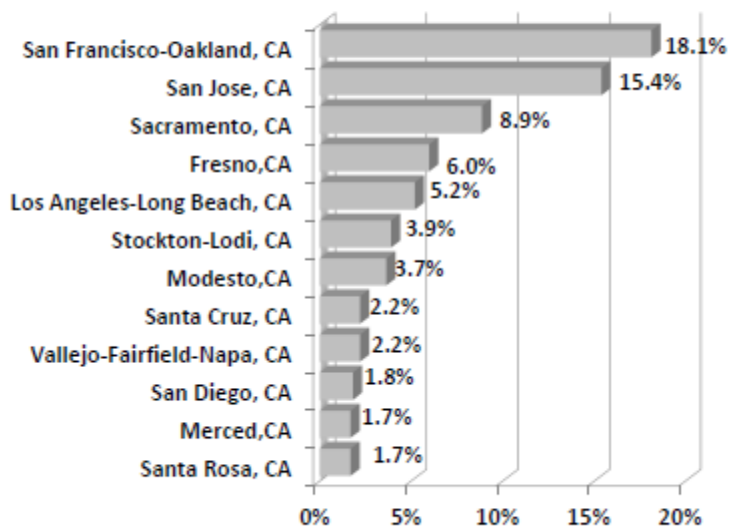
	Hotel	VFR	Day Trip
California	77.0%	62.5%	88.6%
Washington	1.9%	0.0%	0.0%
New York	1.3%	2.5%	1.1%
Texas	1.3%	2.5%	1.1%
Nevada	1.5%	5.0%	0.0%
Florida	1.3%	0.0%	0.5%
Colorado	0.6%	5.0%	0.5%
Arizona	1.3%	0.0%	0.0%
Illinois	0.9%	0.0%	0.5%
Oregon	0.6%	2.5%	0.0%
Base	527	40	185

Base: Domestic respondents. 819 completed surveys.

POINT OF ORIGIN: MSA

Monterey County's top domestic feeder market in the first three quarters of 2016 was the San Francisco-Oakland, CA MSA (18.1%). This is followed by the San Jose, CA MSA which contributed 15.4 percent of the County's domestic visitors.

Chart 33: Point of Origin—MSA (% of domestic visitors)



Question: What is your zip/postal code?

Detail by Type of Visitor

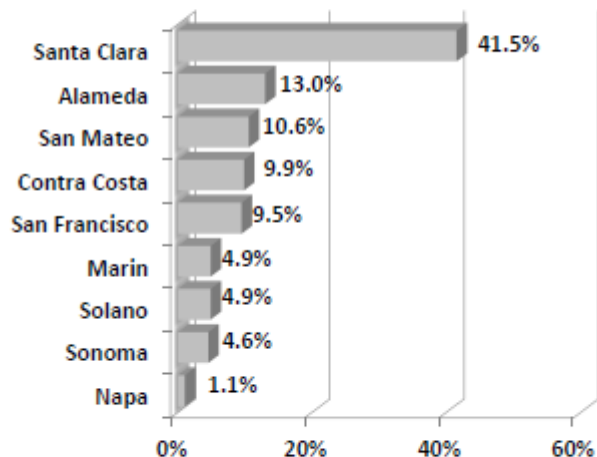
	Hotel	VFR	Day Trip
San Francisco-Oakland, CA	19.0%	13.6%	16.3%
San Jose, CA	11.8%	9.1%	37.5%
Sacramento, CA	10.9%	9.1%	4.8%
Fresno, CA	6.0%	9.1%	8.7%
Los Angeles-Long Beach, CA	4.2%	4.5%	4.8%
Stockton-Lodi, CA	4.8%	0.0%	3.8%
Modesto, CA	3.6%	0.0%	5.8%
Santa Cruz, CA	1.5%	0.0%	4.8%
Vallejo-Fairfield-Napa, CA	2.7%	0.0%	0.0%
San Diego, CA	2.1%	4.5%	1.0%
Merced, CA	1.8%	0.0%	1.0%
Santa Rosa, CA	1.8%	0.0%	1.0%
Base	498	34	172

Base: Domestic respondents. 766 completed surveys.

POINT OF ORIGIN: COUNTY (BAR AREA REGION)

The largest proportion of visitors surveyed from the San Francisco Bay Area reside in the nearby county of Santa Clara (41.5%). Residents of Alameda County account for 13.0 percent of this regional traffic.

Chart 34: Point of Origin—County



Question: What is your zip/postal code?

Detail by Type of Visitor

	Hotel	VFR	Day Trip
Santa Clara	33.3%	28.6%	56.6%
Alameda	14.0%	0.0%	10.8%
San Mateo	11.1%	14.3%	9.6%
Contra Costa	12.9%	0.0%	7.2%
San Francisco	9.9%	28.6%	7.2%
Marin	5.8%	14.3%	2.4%
Solano	5.8%	0.0%	4.8%
Sonoma	5.8%	14.3%	0.0%
Napa	1.2%	0.0%	1.2%
Base	171	7	83

Base: Bay Area respondents. 284 completed surveys.

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