

**MONTEREY**  
Grab life by the moments:

# MCCVB Quarterly Forum

## Review of First Quarter FY 2016-2017

October 26, 2016



# Q1 2016-17 Highlights

**MONTEREY**  
Grab life by the moments:

# Research & Analysis



## **GROUP COMP SET**

### **Large Meetings**

**San Francisco**

**San Jose**

**San Diego**

**Palm Springs**

### **Small Meetings**

**Napa Valley**

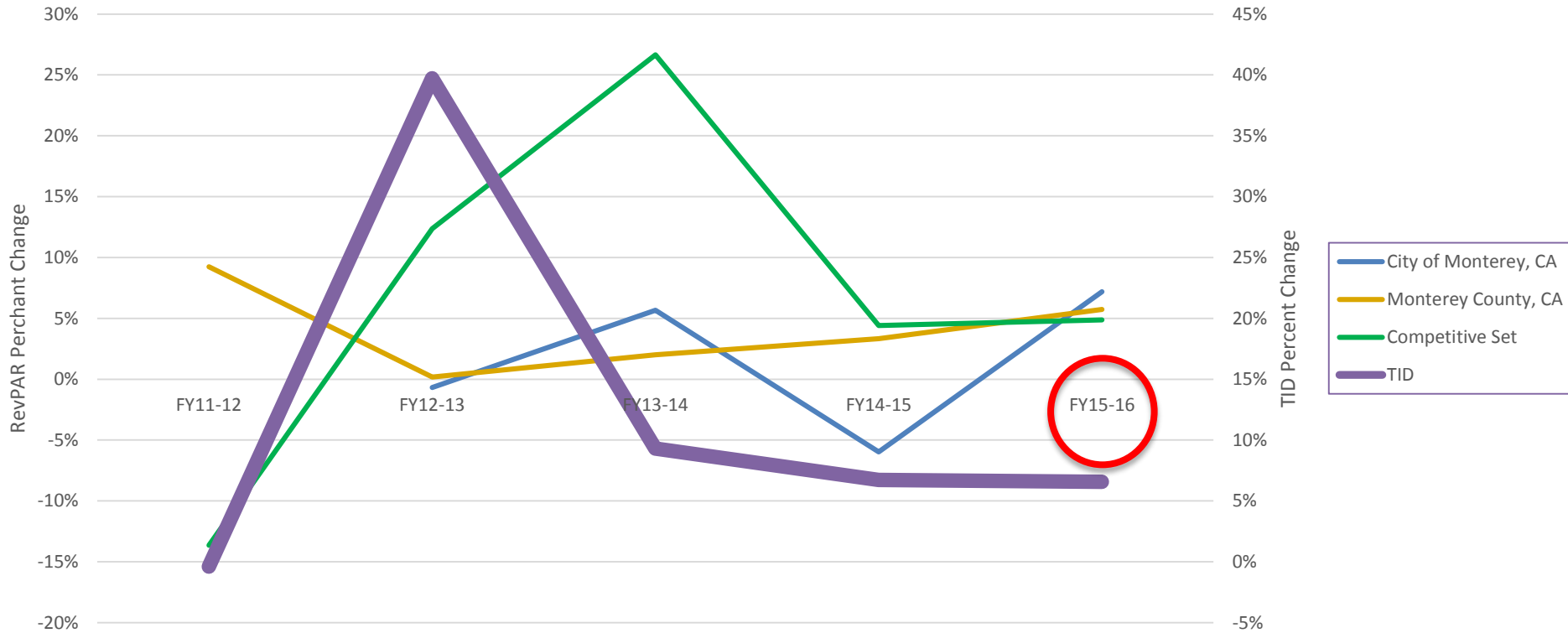
**Santa Barbara**

**Sonoma County**

**Lake Tahoe**

**Laguna/Newport Beach**

# GROUP REVPAR GROWTH



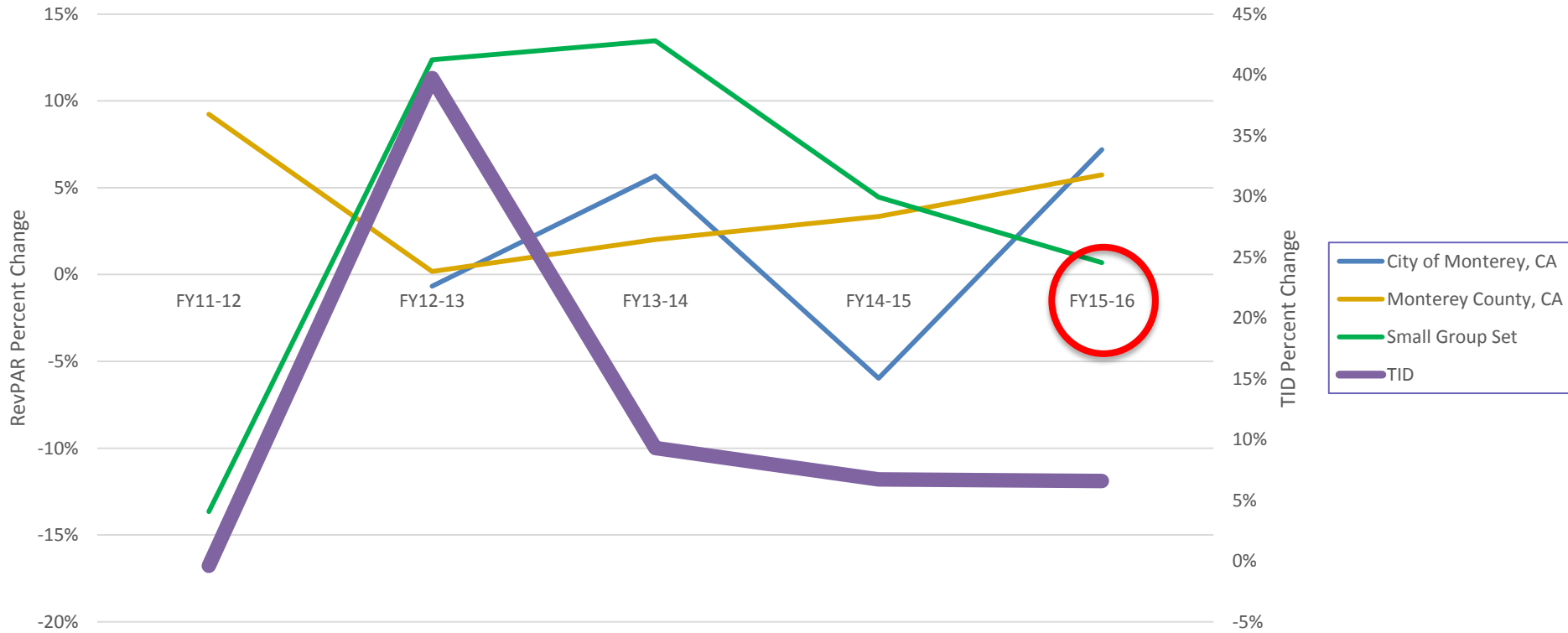
- FY14-15 signifies a shift and impact from TID increase
- FY 14-15 MCCVB increases Group Sales team, expands to new markets
- FY15-16 sees positive trend line for both County and City of Monterey from Comp set

# LARGE GROUP REVPAR GROWTH



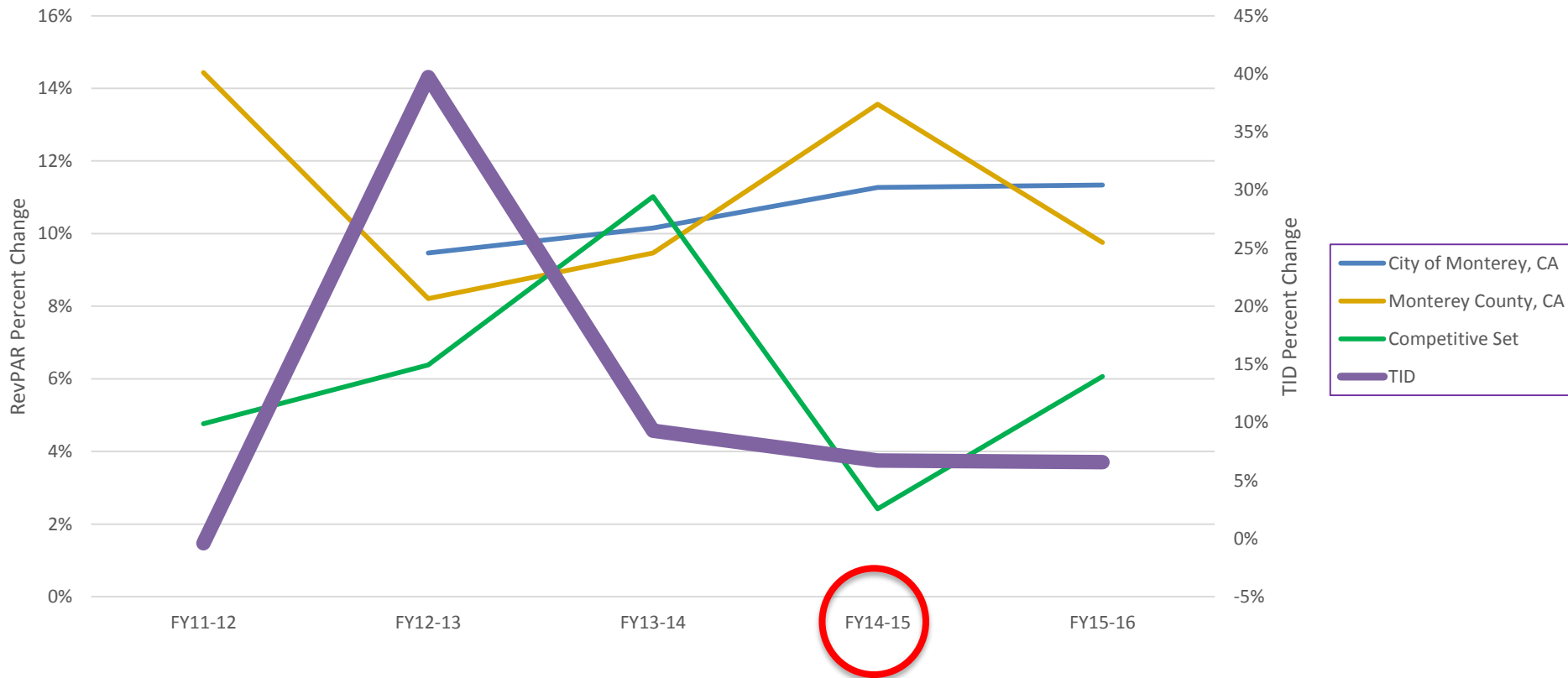
- By year 2 of TID increase Group RevPAR trend for City of Monterey significantly exceeds Large Group Comp set

# SMALL GROUP REVPAR GROWTH



- By year 2 of TID increase Group RevPAR trend for City of Monterey significantly exceeds Small Group Comp set

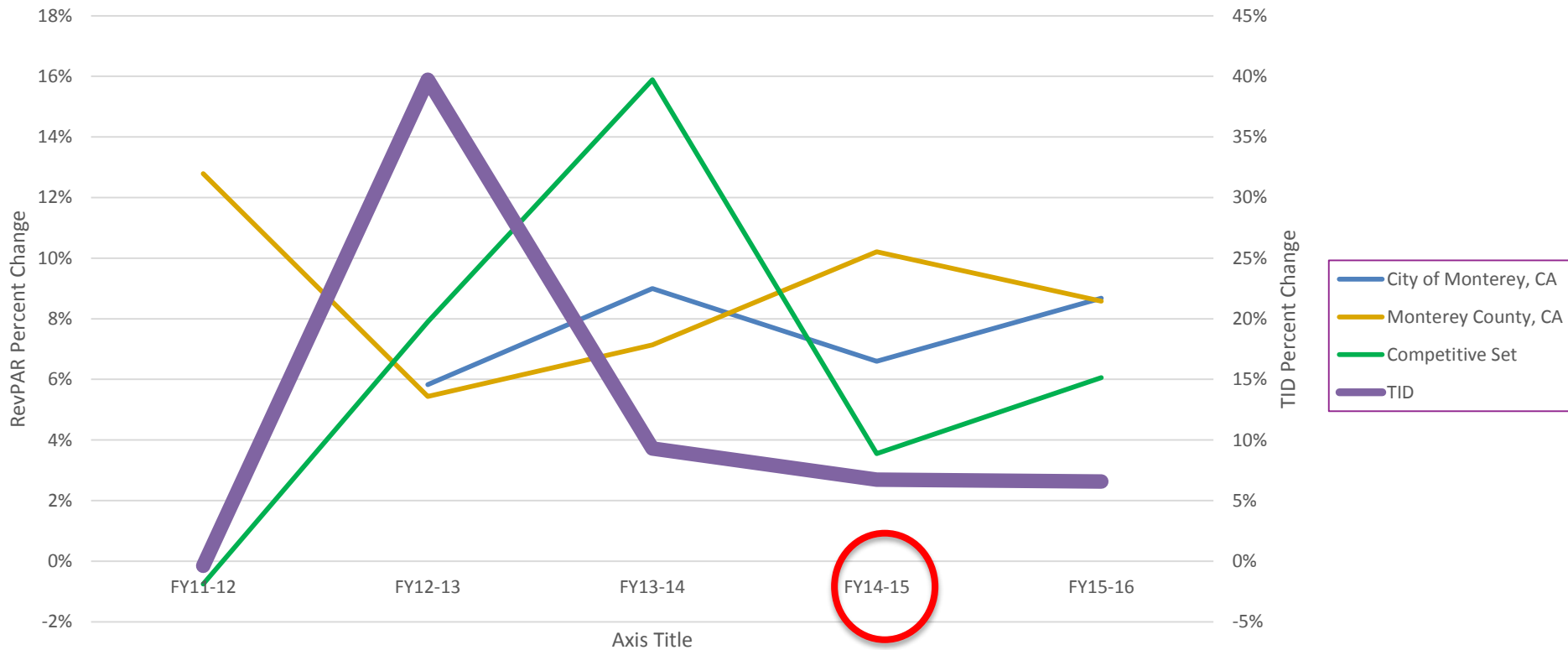
# TRANSIENT REVPAR GROWTH



- TID increase corresponded with lowest dip in RevPAR for County of Monterey and reverses downward trend; within one year contributes to a more dramatic upward shift
- FY 13-14 destination brand launch
- FY14-15 has uptick for City of Monterey



# TOTAL REVPAR GROWTH

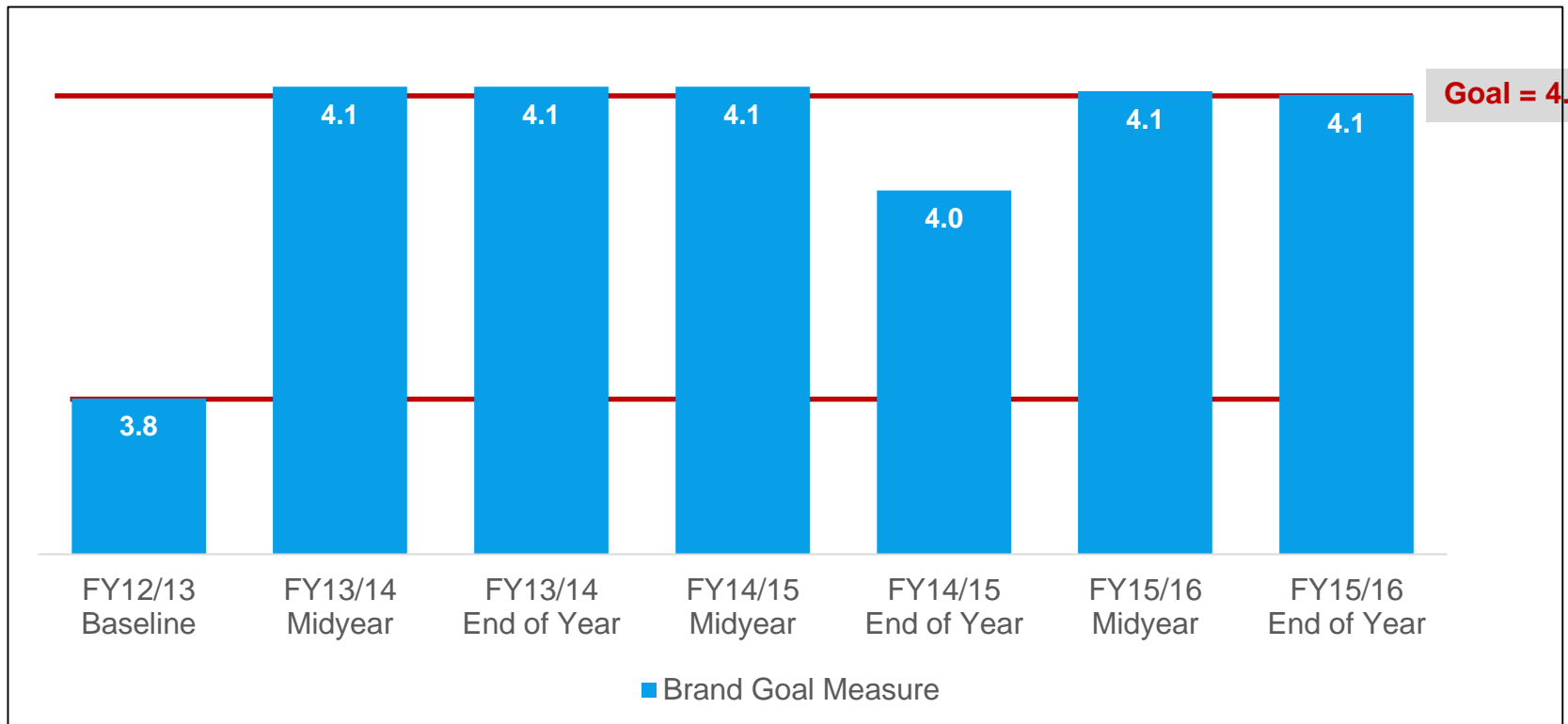


- Here we can see the payoff in examining the consistent, positive trend exceeding 8% while our Competitive Set falls to 5% for the previous two years in total RevPAR growth

# Market Intelligence Report



# 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*.

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

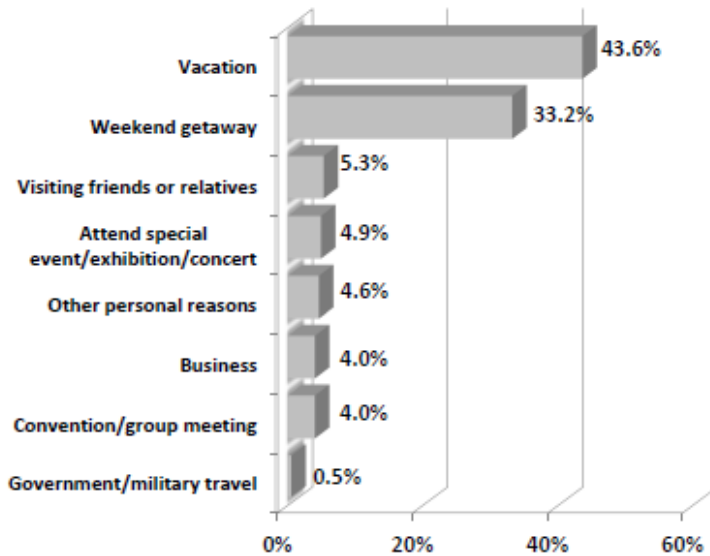
- The lower incidence of hotel/motel stays is a limiting factor, and homesharing/airbnb is a factor in that. For the sake of consistent comparison, paid accommodations are defined as hotel/motel, inn/B&B, or resorts. However, for the current period, including homesharing in this definition increases 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

# 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**

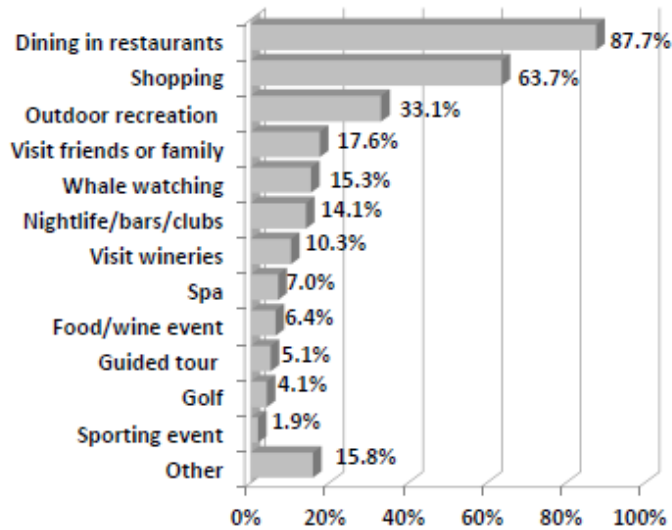
	Hotel	VFR	Day Trip
Vacation	44.6%	25.5%	42.7%
Weekend getaway	32.3%	23.4%	40.0%
Visiting friends or relatives	3.8%	34.0%	3.6%
Attend special event	5.6%	2.1%	2.7%
Other personal reasons	2.4%	12.8%	8.2%
Convention/group meeting	5.8%	2.1%	0.5%
Business	4.9%	0.0%	2.3%
Government/military travel	0.6%	0.0%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

Base: All respondents. 1001 completed surveys.

# 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**

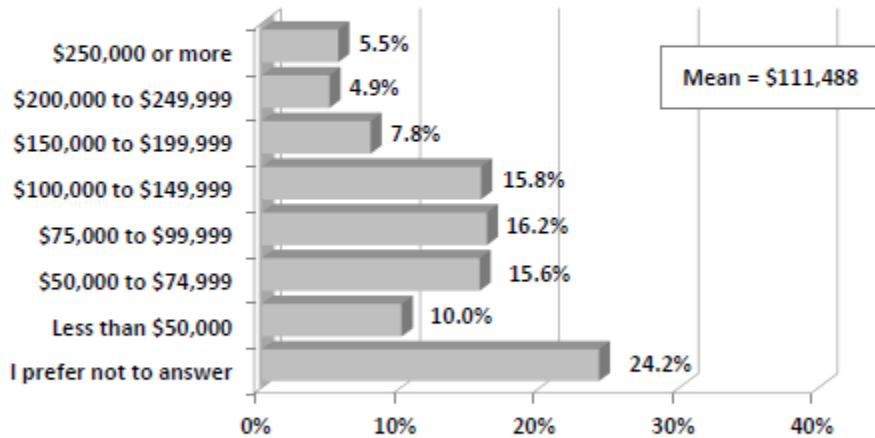
	Hotel	VFR	Day Trip
Dining in restaurants	90.3%	87.2%	85.1%
Shopping	65.7%	63.8%	58.8%
Outdoor recreation	36.2%	40.4%	22.2%
Visit friends or family	15.9%	70.2%	9.5%
Whale watching	15.6%	31.9%	11.3%
Nightlife/bars/clubs	16.6%	23.4%	4.1%
Visit wineries	10.9%	19.1%	5.4%
Spa	8.7%	10.6%	1.8%
Food/wine event	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%
<b>Base</b>	<b>668</b>	<b>47</b>	<b>221</b>

Base: All respondents. 1023 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%
<b>Mean</b>	<b>\$116,352</b>	<b>\$93,750</b>	<b>\$99,556</b>
<b>Base</b>	<b>617</b>	<b>46</b>	<b>208</b>

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

Base: All respondents. 946 completed surveys.



# In Other News...

**MONTEREY**  
Grab life by the moments:





# See Monterey's Expanding Social Reach

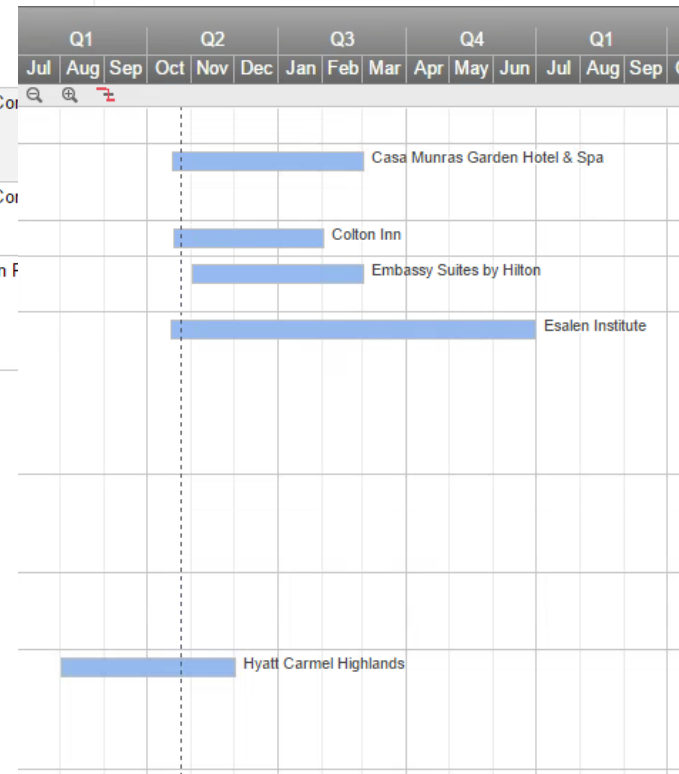


Channel	Q1 – 2015	Q1 – 2016	% Increase YOY
Facebook	73,001	95,767	31.19%
Twitter	13,850	16,894	21.98%
Instagram	3,535	11,451	223.93%
Pinterest	1,927	2,076	7.73%
YouTube	159	190	19.50%
Google +	249	264	6.02%
LinkedIn	874	1,125	28.72%
<b>Total Audience</b>	<b>93,595</b>	<b>127,767</b>	<b>36.51%</b>



# CONSTRUCTION CALENDAR

Property Name	Type	Est. \$	Details	Contact Name	Start Date	End Date	Status
Bernardus Lodge & Spa	New		14 new villas & suites in August 2016				Complete
Casa Munras Garden Hotel & Spa	Renovated		Upgraded 138 of the 163 rooms. Remaining guestrooms to be done in early spring 2017		10/18/16	03/01/17	In Progress
Colton Inn	Renovated		Updating and upgrading all guestrooms		10/19/16	02/01/17	In Progress
Embassy Suites by Hilton	Renovated	10 Million	Renovating atrium, lobby, public space, guest rooms and ballroom.		11/01/16	03/01/17	Not Started
Esalen Institute	Renovated	multi-million	Renovation of the main lodge is complete. will be expanding staff residential housing, improving accessibility, making safety improvements and replacing the Hot Springs Creek Bridge. This is a multi-year project to be completed in 2017.		10/17/16	06/30/17	In Progress
The Hideaway	Rebranded		Full renovation and guestrooms completely redone. The courtyard, front desk and lobby area also have a new modern look.				Co
Hotel Camel	Rebranded		The guestrooms, garden courtyard and gastropub - Brophys Tavern were all renovated and remodeled.				Co
Hyatt Camel Highlands	Renovated	multi-million	Guestrooms, bar, hotel entrance, lobby area and restaurant undergoing upscale enhancements. Includes the merger of the restaurant with its bistro into a new eatery		08/01/16	12/01/16	In F



**MONTEREY**  
Grab life by the moments:

**Coming Soon**



# GROUP SALES



- Visit CA Canada Sales Mission- October 24-28
- Smart meetings Southwest- November 10
- FICP Annual Conference- November 9-12
- CalSAE Seasonal Spectacular- December 1
- AMEXInteraction Tradeshow- December 12-14

# MONTEREY CONFERENCE CENTER

- Groundbreaking & Renovation
- Media FAM slated for February 2017
- Target opening date is March 24<sup>th</sup>, 2017



SPECIAL ADVERTISING SECTION

## MONTEREY COUNTY

The New Monterey Conference Center Revitalizes Downtown

Monterey County is the West Coast's most inspirational destination for meetings and conferences, and is an ideal location to host innovative meetings. The area boasts 12,000 rooms in 250 lodging properties, and a 65-degree average year-round temperature. Monterey County stretches from the artistic fields of Carmel through Monterey Peninsula and down the Big Sur coast, all the way to the Salinas Valley. The area is easily accessible by flying on one of more than 300 direct and one-stop flights into the

Monterey Regional Airport, but far enough away to open minds and inspire new thinking. For meeting and event planners seeking a venue and setting that inspires transformative ideas, there is no better choice than the Monterey Conference Center (MCC).

Merging history and legacy, and being the center piece for Monterey meetings, the MCC is located in the heart of downtown and is set on the spectacular central California coast, offering breathtaking views and unique settings for any event—from conferences and trade shows to meetings and special occasions. With a \$30 million renovation beginning in late November 2015, the all new, state-of-the-art facility will feature 40,000 plus square feet of flexible meeting space and will be LEED-EB Certified by the U.S. Green Building Council.

As a stand alone facility, the MCC will offer flexible meeting and banquet space including a rejuvenated grand ballroom. Once complete, the renovated facility will have the ability to host groups with as many of 3,200 participants and will feature advanced technology. In partnership with adjacent hotels, the MCC and Meeting Connection will provide 70,000 square feet of meeting, exhibition, and banquet space, and over 800 Adana hotel rooms.



CONTACT:  
PHONE: (831) 372-1000  
WEBSITE: [www.montereycc.com](http://www.montereycc.com)





# MARKETING COMMUNICATIONS COMING SOON!

- Visit CA Canada Sales & Media Mission
- Visit CA Media Mission in Chicago
- SF Travel Media Dinner in NYC
- Phoenix Pop-Up Media Dinner + Consumer Activation
- Winter Promotion and Sweepstakes
- Brand USA Destination page
- Travel Zoo Canada content hub
- Sustainable Hospitality Symposium

**MONTEREY**  
Grab life by the moments:

# Trip Advisor





A vibrant night scene at a boardwalk or festival. People are walking along a path lined with colorful neon signs and food stalls. The atmosphere is lively and festive. The text is overlaid on a semi-transparent white box.

**Thank You!**

**Next Quarterly Forum:  
January 25, 2017**

**2:00 PM**

**Intercontinental The Clement**

**MONTEREY**  
Grab life by the moments: