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

We are happy to share our audience research data when appropriate, particularly with our partners in the hospitality industry. Should you want more information about our visitors, please contact:

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The Year In Review

We had much to celebrate as we observed our 30th anniversary on October 20, 2014 – from honors as “Best Aquarium in the World” (TripAdvisor) to a new focus for our conservation and science programs. Looking back, we continued to see positive trends in 2014 for the Aquarium. The highlights are listed below, and are supported by an appendix with selected graphs that provide more background on certain points.

2014 Key Facts and Trends at a Glance

1. Total attendance for the year was 2,066,177 – the third highest attendance in our history and 4.5% higher than 2013 (our fourth highest). We attribute the increase to further progress toward our goal to reach a broader audience by drawing more people from outside our historical core market and attracting a younger, more diverse audience.

2. A digital, search-based advertising program was a key factor in attracting more visits to the Aquarium and the destination. In 2014 this campaign drew an added 351,000 Aquarium visitors and created 242,300 additional room nights for the destination. Overall, nearly half of our visitor groups spent the night in an area hotel.

3. 2014 Aquarium visitor origins were 21% San Francisco Bay Area, 11% Sacramento/Stockton/Fresno, 15% Other California, 21% other states, 12% international and 12% local.

4. When people are most likely to visit has remained consistent over the past three years (2012-2014): 25% of total attendance visited during July and August. Schedule is the number one factor in our visitors’ leisure time decision-making process, and attempts to influence visit timing have not been successful.

5. More families with children under 18 years old visited the Aquarium in 2014 than in the previous two years, and once again we attracted a high proportion (45%) of families. Still, adults traveling without children are a higher proportion (55%) of Aquarium visitors than families traveling with children.

6. Most Aquarium members live in the Silicon Valley and Monterey areas, and 60% of all member households are families with children.

7. In 2014, the annual household incomes of Aquarium visitors reflected the household incomes of California residents, except at the upper and lower income levels. Specifically, Aquarium visitors were more likely to come from households earning more than $100,000 (due largely to marketing efforts targeting this income level), and less likely to come from households earning less than $35,000.

8. Nearly one-third (31%) of all adult visitors reported learning a great deal about ocean conservation during their visit, and a slightly higher proportion (37%) felt greatly inspired to take action.

9. Slightly more than one-quarter (27%) of paid Aquarium visitors from California were Hispanic. Visitation by Hispanic visitors from California has increased nearly 50% since 2010, due to both targeted marketing initiatives and the ongoing shift in state demographics.

10. About a third of Hispanic groups visiting the Aquarium in 2014 spent at least one night in a Monterey-area hotel during their visit, accounting for an estimated 77,000 room nights.

11. A majority of our California Hispanic attendance came from San Francisco and the local tri-county area (Monterey, Santa Cruz and San Benito counties) markets in which we advertise directly in Spanish language media.
12. Market research indicates the Aquarium has the highest favorability ranking by Hispanic audiences among California non-profit visitor-serving organizations with an annual attendance of 1 million or higher.

13. The number of people who engage with the Aquarium through social media is huge and growing. About 2.3 million people follow the Aquarium on our social media platforms. A majority of our onsite visitors are on Facebook; Aquarium visitors are super-connected and use mobile and online tools for research and trip planning. We continue to dedicate more resources to marketing to our visitors directly through mobile and social media.

- Visitors who use Facebook and/or Instagram are more likely to be young (18-34 years old). By contrast, visitors who use TripAdvisor are more likely to be mature (55 years and older). And visitors who use Yelp are more likely to be young to middle-aged (25 to 44 years old).

- Visitors who use TripAdvisor and/or Yelp are more likely to have annual household incomes above $150,000. By contrast, visitors who use Instagram are more likely to have annual household incomes under $50,000.

- The proportion of visitors using Tumblr was larger for the 18-24 age group than for all older ages. The proportion of visitors using Google+ was largest for the 45-64 age range.

- The proportion of visitors using Twitter was higher in 2014 than in 2013 and 2012.

- English speakers and Caucasians were more likely to use Trip Advisor than non-English speakers and other ethnic groups.

- Visitors who use Instagram are more likely to be Hispanic than non-Hispanic.

2015 Marketing Strategies based on 2014 Research Findings

Our annual market research informs our marketing plan for the following year. These 2015 strategies in particular reflect what we learned in 2014.

- An integrated advertising campaign consisting of online, TV, radio and out-of-home will run in the San Francisco Bay Area between Memorial Day and Labor Day. With no market fatigue evident, we will continue our “Share the Love” campaign with refreshed creative.

- We will continue to implement a year-round online, search-based advertising program that targets high-propensity visitors from outside our historical core market (San Francisco Bay Area).

- Market research shows the Hispanic audience’s perceptions of the Aquarium mirror those of the historical general market on favorability and response to advertising, indicating that lines between the two have blurred. In response, we will target both our historical core market and acculturated Hispanics using the same advertising campaign with only minor variations.

- We will continue to streamline and target media outreach through our new online newsroom, which offers journalists and bloggers a one-stop shop for their visual and editorial needs, as well as a current snapshot of the activity on our busy social media platforms.

- In the face of growing threats to ocean health, we adopted a new strategic approach for and will focus our conservation and science programs on critical issues affecting the ocean, including protecting such key species as sea otters, white sharks and Pacific bluefin tuna.
The Aquarium’s Hispanic events draw less-acculturated Hispanics who have lower household incomes and speak Spanish more in the home than visitors attending during non-event periods. These events successfully introduce new audiences to the overall Aquarium experience and our mission; event visitors rate their overall satisfaction, educational experience and level of inspiration higher than non-Hispanic event visitors.

The Aquarium employs more than 500 people, with a $28.8 million annual payroll.

The $2.2 million national online advertising campaign we launched in 2014 generated an added $108.97 million in area tourism spending, and $9.71 million in added tax revenues (sales tax and transient occupancy tax).

Since opening in 1984, the Aquarium has maintained a focus on education for schoolchildren, providing free visits to more than 2.2 million students. On average, 76,500 students participate in field trips each year – 65% from elementary schools. Annually, 17% of all Monterey County students and 17% of all Santa Cruz County students participate in our school programs.

A key element of the Aquarium’s education strategy is to focus on teachers. On average, we engage 1,500 teachers each year – 99% are from California and 80% teach in public schools. Their students are 50% Hispanic and 30% Caucasian.

In 2014, the Aquarium admitted 108,259 people in our community free of charge, a 51% increase over 2013. These guests included underserved audiences visiting through our “Free to Learn” (12,904), “Shelf to Shore” (30,123), “Student Ocean Stewards” (1,589) and annual “Community Open House” (63,643) programs. We expanded our “Community Open House” in 2014 to include residents of Santa Cruz and San Benito counties, and introduced the new approach to tri-county residents by offering a one-time event in February in addition to the annual December event.
6. In 2014, the annual household incomes of Aquarium visitors reflected the household incomes of California residents, except at the upper and lower income levels. Specifically, Aquarium visitors were more likely than California residents to come from households earning more than $100,000 (due largely to marketing efforts targeting this income level), and less likely to come from households earning less than $35,000.

Comparison of Aquarium Visitors and California Households by Income Category

- Aquarium Visitors
- California Households

<table>
<thead>
<tr>
<th>Income Category</th>
<th>Aquarium Visitors</th>
<th>California Households</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less than $35,000</td>
<td>16%</td>
<td>30%</td>
</tr>
<tr>
<td>$35,000 to $49,999</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>$50,000 to $74,999</td>
<td>18%</td>
<td>17%</td>
</tr>
<tr>
<td>$75,000 to $99,999</td>
<td>14%</td>
<td>12%</td>
</tr>
<tr>
<td>$100,000 or more</td>
<td>38%</td>
<td>22%</td>
</tr>
</tbody>
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9. Slightly more than one-quarter (27%) of paid Aquarium visitors from California were Hispanic. Visitation by Hispanic visitors from California has increased nearly 50% since 2010, due to both targeted marketing initiatives and the ongoing shift in state demographics.
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Guest and Community Highlights
Key facts and trends from the Monterey Bay Aquarium’s 2014 guest surveys and related market research data