Guest & Community Highlights 2016

KEY FACTS AND TRENDS
The Year in Review

¡Viva Baja! Life on the Edge introduces visitors to the unique and fragile ecosystems of Baja California, and the conservation connections we share with our southern neighbors. Our newest special exhibition, which opened in March, features flashy fishes, colorful crustaceans and even riveting desert reptiles—a first for us.

Our conservation work continued to advance healthy local—and global—ocean habitats. We shared encouraging new research showing that sea otter pups we raised and then released into Elkhorn Slough have helped restore this vital wetland. We also hosted a first-ever international “Bluefin Futures Symposium” to bring the plight of these fish center stage, and we worked with colleagues to tag over 3,000 Pacific bluefin tuna in the Sea of Japan—an unprecedented effort to understand what lies behind the dramatic decline in their population.

We inspired millions of California voters to join us in support of Proposition 67, and together approved a first-in-the-nation law to ban single-use carryout plastic bags, which harm the ocean and its wildlife—and may pose a threat to humans as well.

Thanks to generous support from donors, we started construction on our Center for Ocean Education and Leadership. The state-of-the-art learning center, which will open in 2019, will allow us to share our ocean science programs with thousands more students and teachers.

We welcomed 2.1 MILLION visitors—the first time we’ve hosted over 2 million guests for three consecutive years.
Attendance, Demographics & Visitation Information

Comparison of Aquarium Visitors and California Households by Income

The annual household incomes of Aquarium visitors again reflected the household incomes of California residents, except at the upper and lower income levels.

Specifically, Aquarium visitors were more likely than California households to have high incomes (due to marketing efforts specifically targeting this income level) and less likely to have low incomes. To offset this difference, we offer robust affordable access programs that admit over 93,000 people to the Aquarium for free who otherwise couldn’t afford to visit.

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Aquarium Visitors</th>
<th>California Households</th>
</tr>
</thead>
<tbody>
<tr>
<td>Less Than $35,000</td>
<td>21%</td>
<td>29%</td>
</tr>
<tr>
<td>$35,000 to $99,999</td>
<td>39%</td>
<td>41%</td>
</tr>
<tr>
<td>$100,000 to $199,999</td>
<td>28%</td>
<td>22%</td>
</tr>
<tr>
<td>$200,000 or More</td>
<td>12%</td>
<td>8%</td>
</tr>
</tbody>
</table>

Both statistics represent a 3% increase over 2015.
Attendance, Demographics & Visitation Information

64% Adults traveling with children

36% Adults traveling without children

47% Used social media to plan their visit

Compared to 38% who used our website
Visitation

The majority of Aquarium visitors are adults who travel without children. A 28% difference between the number of adults traveling with and without children remained consistent in 2016 from 2015.

Groups visiting with children represented 36% of visitors—and 61% of member households.
Local visitors and those from elsewhere in California were more likely to visit with children than visitors from outside California.

More people are using social media sites than our website to plan their visit to the Aquarium.
Those sites are Facebook, Twitter, TripAdvisor, Yelp and Google. (See Social Media section for user characteristics by platform.)

Our digital, search-based advertising campaign once again helped to attract more visitors to the Aquarium and the destination.
In 2016 this campaign drew 402,000 more visitors (an increase of 30,000 over 2015) and created 259,000 additional room nights against our 2010 baseline.

Scheduling is the top factor in our visitors’ leisure time decision-making process, and attempts to influence visit timing continue to be unsuccessful.
Where are they coming from?

Visitor and member origins remain mostly unchanged.

In 2016 about a quarter of Aquarium visitors were from the San Francisco Bay Area, followed in decreasing numbers by visitors from other cities in California, other states, international countries and the local Monterey area. Most Aquarium members are from the Monterey and Silicon Valley areas.
Hispanic Visitation & Economic Impact

Most of our Hispanic attendance is from California, with the majority of visitors arriving from the San Francisco, Sacramento, Fresno and local tri-county area (Monterey, Santa Cruz and San Benito counties) markets in which we advertise directly in Spanish language media.

Hispanic visitors ages 25-34 were more likely than their non-Hispanic counterparts to report they learned a great deal during their visit.
Social Media Use

In general, more people (47%) reported using social media sites—mostly Google, followed by Facebook, TripAdvisor, Twitter and Yelp—than used our website (38%) to plan their visit to the Aquarium.

User Characteristics by Demographics (report using social media to plan visit)

Visitors ages 25 to 44 were more likely to report using social media to plan their visit to the Aquarium than those 55 and older (52% vs. 33%).

Visitors traveling from outside the U.S. were more likely than visitors from the greater San Francisco Bay Area, local Monterey area, and states outside California to report using social media to plan their visit (60% vs. 47%, 32%, 51%, respectively).

Visitors from the local area were less likely than visitors from greater San Francisco Bay area, Sacramento/Stockton, Fresno, and other areas in California to report using social media to plan their visit (32% vs. 47%, 54%, 52%, 51%, respectively).

User Characteristics by Demographics (report being influenced by social media to visit)

Visitors ages 18 to 24 were more likely to be influenced by social media to visit the Aquarium than visitors 45 and older (19% vs. 7%).

Visitors ages 25 to 34 were almost three times as likely to be influenced by social media than visitors 55 and older (14% vs. 5%).

Visitors with incomes less than $35k were twice as likely to be influenced to visit by social media than visitors with incomes of $100k or more (19% vs. 9%).

Visitors from the local area were twice as likely to be influenced than those traveling from outside California (19% vs. 8%). Those traveling from Fresno were also twice as likely to be influenced than those from outside California (17% vs. 8%).
User Characteristics by Age and Platform

Most adult visitors are active on social media—82% reported they regularly use one or more sites. The age of those visitors doesn't vary much from one platform to the next, but in general:

Social Media Users by Age

82% of all adult visitors are active on social media.

Most Popular Platforms by Age

<table>
<thead>
<tr>
<th></th>
<th>FACEBOOK</th>
<th>INSTAGRAM</th>
<th>YOUTUBE</th>
<th>TRIPADVISOR</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-24</td>
<td>71%</td>
<td>47%</td>
<td>44%</td>
<td>42%</td>
</tr>
<tr>
<td>25-34</td>
<td>86%</td>
<td>59%</td>
<td>42%</td>
<td>42%</td>
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<tr>
<td>35-44</td>
<td>85%</td>
<td>42%</td>
<td>24%</td>
<td>42%</td>
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<tr>
<td>45-54</td>
<td>81%</td>
<td>42%</td>
<td>24%</td>
<td>42%</td>
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<tr>
<td>55-64</td>
<td>81%</td>
<td>40%</td>
<td>40%</td>
<td>40%</td>
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<tr>
<td>65+</td>
<td>73%</td>
<td>41%</td>
<td>33%</td>
<td>33%</td>
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</tbody>
</table>
User Characteristics by Age and Platform

Most Popular Platforms by Household Income

<table>
<thead>
<tr>
<th></th>
<th>FACEBOOK</th>
<th>INSTAGRAM</th>
<th>YOUTUBE</th>
</tr>
</thead>
<tbody>
<tr>
<td>LESS THAN $35,000</td>
<td>84%</td>
<td>44%</td>
<td>57%</td>
</tr>
<tr>
<td>$35,000 TO $99,999</td>
<td>83%</td>
<td>52%</td>
<td>42%</td>
</tr>
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<td>$200,000 OR MORE</td>
<td>83%</td>
<td>53%</td>
<td>37%</td>
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</table>

Between 2015 and 2016, the proportion of Pinterest users ages 55-64 increased by an estimated 70%, and the proportion of Twitter users of the same ages increased by an estimated 170%.

Hispanic Social Media Use

Among Hispanic visitors who are active on social media, usage of YouTube decreased by 20% in 2016.

Hispanic visitors were more likely than non-Hispanic visitors to report using social media to plan their visit to the Aquarium (57% vs. 46%).
Community Impacts at a Glance

Our digital, search-based advertising campaign once again helped to attract more visitors to the Aquarium and the destination. In 2016 this campaign drew 402,000 more visitors (an increase of 30,000 over 2015) and created 259,000 additional room nights against our 2010 baseline. That translates into $59.05 million spent on lodging, $28.13 million on retail and $32.65 million on food & beverage—a total of $119.83 million in tourism spending and $11.29 million in tax revenue (sales tax & TOT).

Education for schoolchildren remains a top priority. Since we opened in 1984 we have provided free visits to more than 2.3 million students. On average, 79,000 students participate in field trips each year—20% of all students from Monterey County and 20% from Santa Cruz County visited on a field trip in 2016.

Recognizing the shift in demographics in California, in 2002 the Aquarium began welcoming Spanish-speaking Hispanic audiences by holding cultural events. Since then, they have rated their overall satisfaction, educational experience and level of inspiration higher than non-Hispanic audiences. These events successfully introduce new visitors to our mission and the overall Aquarium experience, the goal being to cultivate this audience to become repeat visitors not only to the Aquarium but also the destination.

In 2016 the Aquarium admitted more than 93,000 people in our community free of charge, including audiences visiting through our “Free to Learn,” “Shelf to Shore,” and “Student Ocean Stewards” affordable access programs, and our annual “Community Open House.”
Supporting Local, Sustainable Fisheries And Fishermen
With help from $30,000 in Aquarium funding, the nonprofit Monterey Bay Fisheries Trust is exploring a new project that aims to keep sustainable, locally caught seafood in local markets.

Keeping Our State’s Coastline Beautiful
The Aquarium supported Proposition 67, a successful 2016 ballot referendum upholding California’s statewide ban on single-use plastic carryout bags. The victory creates a cleaner coast for our residents and visitors.

Helping Maintain A Healthy Sea Otter Population And Coastal Ecosystems
Rescued sea otter pups we’ve returned to the wild account for more than half the otter population at Elkhorn Slough and are helping restore the wetland’s vital seagrass beds.

Funding Local Conservation Projects
Aquarium staff donate to the voluntary Employee Conservation Action Fund, which supports local conservation projects focused on native species and terrestrial habitats that benefit our regional watersheds. We’ve awarded modest grants toward that goal each year since 1998. In 2016, our staff awarded nearly $14,000 to different local habitat restoration organizations.

Community Impacts at a Glance
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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