



VISIT
OCEANSIDE®

Always O'iginal

Advertising Effectiveness Wave 2

October 2025

SMARInsights

Table of Contents

	Page
Background & Objectives	3
Methodology	4
Campaign Overview	5
Insights	6
Advertising Awareness & Creative Review	8
Ad Influenced Travel and ROI	12
Trip Specifics	21
Appendix: Organic and Earned Media	32
Appendix: Detailed Ad and POE Influence on Lodging Tables	39
Appendix: Follow-ups	42
Appendix: Questionnaire	53

Background & Objectives

- Visit Oceanside (VO) has partnered with Strategic Marketing & Research Insights (SMARInsights) to measure the effectiveness and return on investment (ROI) of its FY25 leisure advertising.
- VO promoted the destination through a FY25 base-awareness campaign and ran a spring advertising campaign from February to May 2025.
- The following report reviews findings from the second wave of a two-wave advertising effectiveness & ROI research program. The objectives of this second wave research are to:
 - Review ad awareness and creative ratings
 - Assess the advertising's influence on Oceanside, CA leisure travel
 - Estimate ad-influenced trips and visitor spending
 - Calculate the return on the media investment
 - Evaluate trip specifics
 - Uncover insights that will help guide future marketing efforts

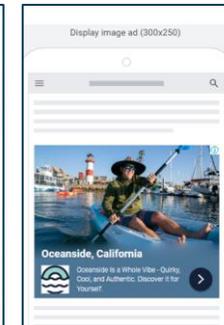
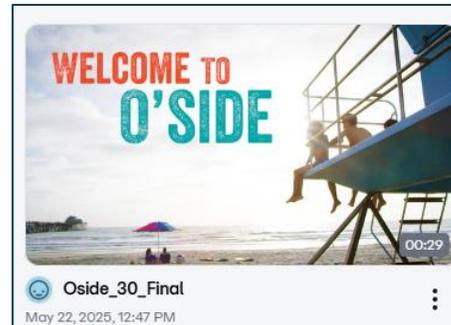
Methodology

- An online survey was used so that respondents could view the actual advertising. This method provides a representative measure of aided ad awareness and allows respondents to provide their reaction to the creative.
- National sample vendors with representative panels are used so that the results can be projected to the population.
- To qualify for the survey, respondents must be household travel decision-makers who regularly take overnight leisure trips of at least 50 miles from home. Respondents must also be at least 18 years of age.
- A total of 1,544 surveys were completed between October 3rd and 9th, 2025. Upon completion of data collection, the results were cleaned, coded and weighted to be representative of the population.
- The following report summarizes the ad effectiveness research results for the second phase.

Market	Completed Surveys
Drive Markets:	
Los Angeles	557
Riverside County	132
Orange County	178
Fly Markets:	
Bay Area <i>San Francisco-Oakland-San Jose</i>	308
Phoenix (Prescott), AZ	213
Las Vegas, NV	156
Total	1,544

Campaign Overview

- VO invested \$623,867 in its FY25 base awareness campaign and spring advertising campaign, targeting key spot markets across both drive and fly regions.
- The advertising tested includes online travel agencies (OTA), social media, video, search engine marketing (SEM), Performance Max, and digital display. PR articles provided additional earned media exposure and were included in testing, though no paid value was assigned.
- Sample ads are shown below. The complete collection of ads tested can be found in the questionnaire in the Appendix.



Medium	Spend
Online Travel Agency (OTA)	\$200,000
Social Media	\$157,067
Video	\$116,000
Search Engine Marketing	\$69,650
Performance Max	\$51,400
Digital Display	\$29,750
Total	\$623,867

Insights

Ad Awareness Review

- The advertising generated 35% awareness in the target markets, reaching about 3 million households.
- With a media investment of \$624,000, the cost per aware household is \$0.20 – indicating better than average efficiency compared to the industry average of \$0.26 for similar campaigns.
- The media plan resulted in substantial media overlap, with more than three-quarters of those aware of the ads recalling seeing ads in multiple media.

Ad Influence & ROI

- The advertising ultimately influenced Oceanside travel, generating a 2.1% travel increment that equates to about 64,000 ad-influenced trips.
- With an average trip spending of \$1,433 among the ad-aware visitors, the advertising influenced about \$92 million in visitor spending.
- The ROI is \$148, meaning that the advertising returned \$148 in visitor spending for each \$1 invested in the media.
- Generating media overlap was critical to influencing travel, highlighting the importance of aiming to achieve overlap when developing future media plans.
- In addition to influencing the decision to visit Oceanside, the advertising led to longer, more active trips with greater satisfaction and higher spending by showcasing the product and giving viewers trip ideas.
- Adding owned and earned assets boosts awareness by over a million households, nearly doubles influenced trips, and adds about \$75 million in influenced visitor spending.
- Paid media drove 194K paid lodging nights (\$42M), rising to 342K nights (\$70M) when earned and owned media are included.

Insights cont.

Trip Specifics

- The top “main reasons” for visiting Oceanside include relaxation/rejuvenation, nature and scenic beauty, outdoor adventure, and social/family connection. These motivators should be prioritized in future marketing materials.
- As uncovered in Wave 1, the top activity motivators are the beach, the Oceanside Pier, scenic drives, shopping, the harbor, and culinary experiences. VO should also continue to incorporate these top motivators into future creative.
- Oceanside visitors are positive about their trips and are likely to return. Visitors give Oceanside a decidedly positive net promoter score, indicating strong likelihood to recommend the destination.

Organic and Earned Media

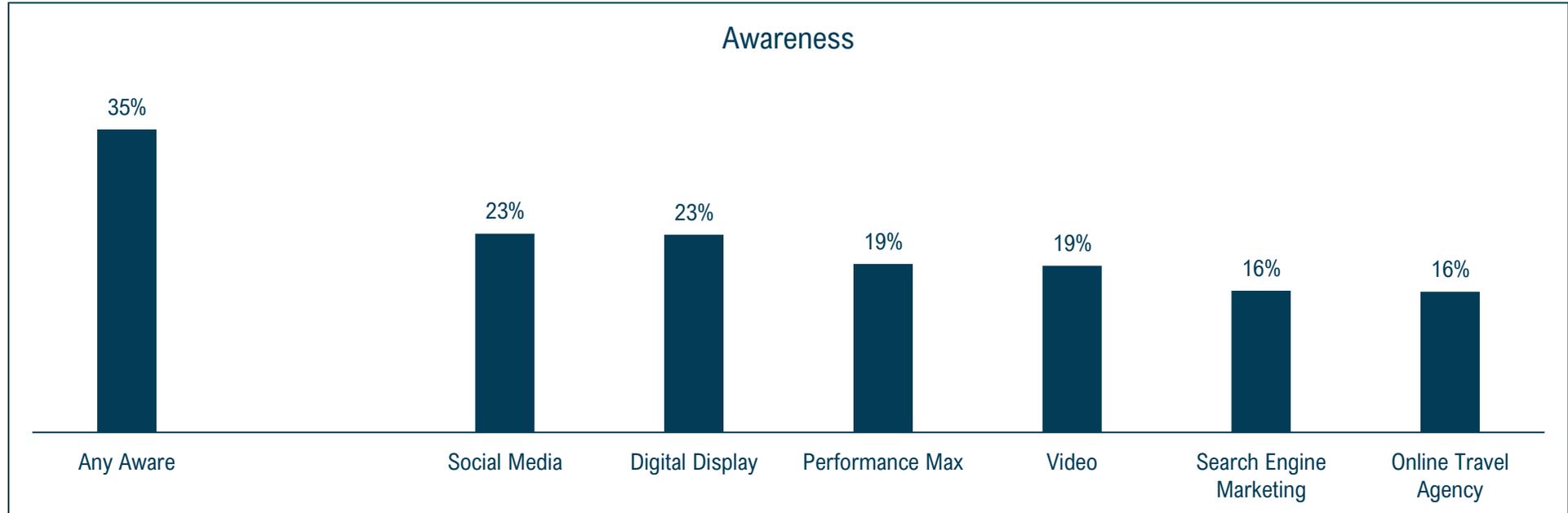
- Nearly all who engaged with Oceanside’s owned assets were also aware of paid efforts, indicating that advertising effectively drives engagement with owned channels.
- VO’s organic social posts are reaching about 1 in 3 users of the platforms and about 1 in 5 overall leisure travelers.
- Just under half of leisure travelers recall reading an article about Oceanside, with strongest recall for stories highlighting beaches, food, the Pier/Harbor, and family travel – indicating these themes most strongly resonate with audiences.
- Awareness of paid and earned media go hand in hand – over 80% of those aware of paid ads also recalled earned media, versus only 21% among those unaware of ads. This underscores the value of integrating both channels, as earned media both complements paid efforts and reinforces brand recognition.
- Similar to media overlap, combining paid and organic marketing drives greater influence on Oceanside travel than paid efforts alone – reinforcing the importance of engaging consumers through both channels.

Advertising Awareness and Creative Ratings Review



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Ad Recall



- This reflects awareness measured in Wave 1, which was captured at the end of the marketing campaign and provides a representative measure of overall awareness.
- Overall, the FY25 advertising generated 35% awareness in the target markets.
- Social media and digital display ads have the highest overall reach, with each achieving 23% awareness.

Cost per Aware Household

- The 35% overall awareness measure equates to reaching just over 3 million households.
- A media investment of \$623,868 results in a \$0.20 cost per aware household, which outperforms SMARInsights' benchmark of \$0.26 for campaigns with similar budgets and target household populations.

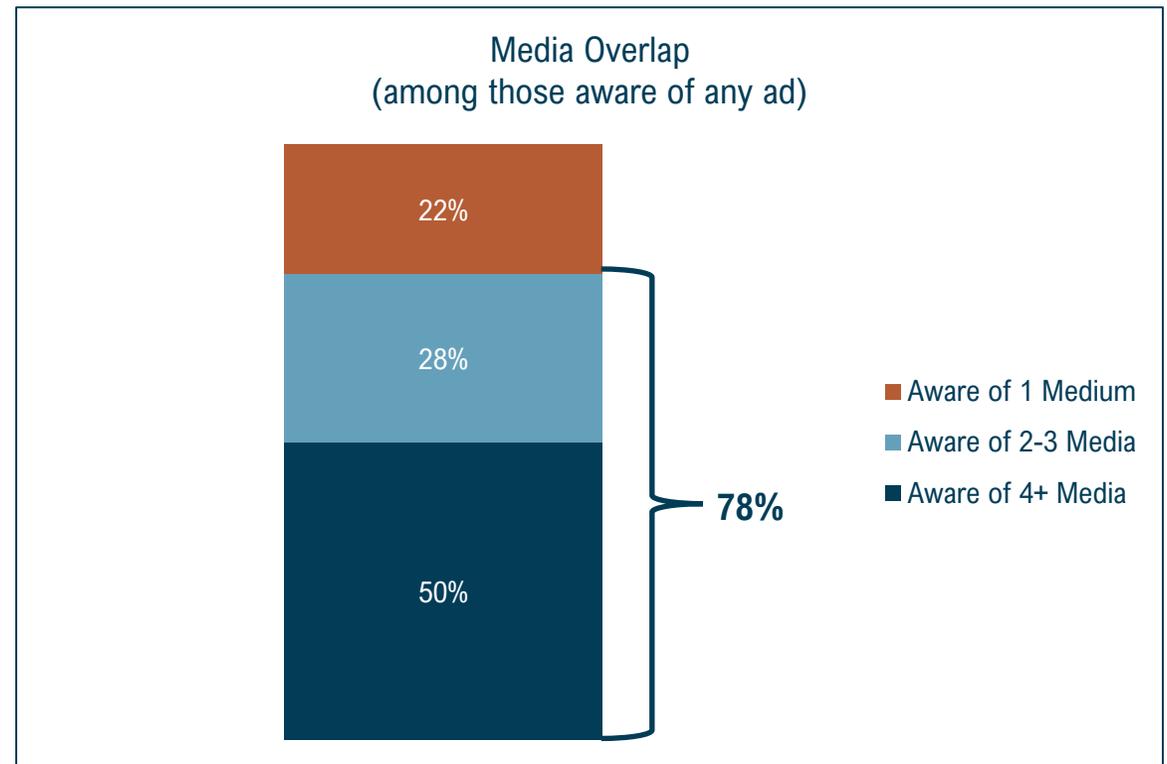
Target HHs	8,797,675
Ad Awareness	35%
Ad-Aware HHs	3,046,950
Media Investment	\$623,868
Cost per Aware Household	\$0.20



SMARInsights'
spot market
benchmark:
\$0.26
per Aware
Household

Media Overlap

- Among those who are aware of any ad, 78% recall seeing ads in multiple media.
- It's important to reach consumers across multiple media types, as each communicates different messages at different stages of the travel planning funnel.
- The impact of media overlap on Oceanside travel is explored later.



Ad Influenced Travel and ROI

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Ad-Influenced Travel Approach

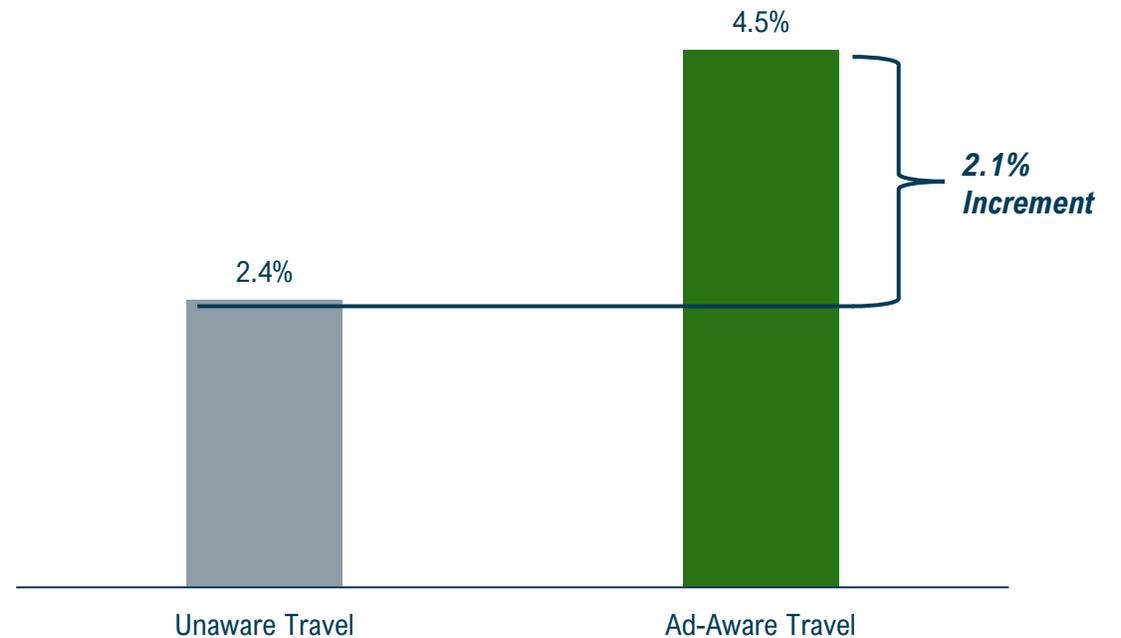
- SMARInsights' methodology for measuring the influence of destination advertising relies on establishing a base rate of travel. Certainly, there would be travel to Oceanside in the absence of paid advertising. Thus, not all Oceanside travel – or even travel by ad-aware households – is considered influenced by the ads.
- Rather, the level of Oceanside travel among unaware households is considered the baseline and what the area would see without the advertising. Accordingly, any travel above that baseline by aware households is what is considered influenced or “incremental.”
- It is important to note that we are accounting for trips that occurred after the bulk of the advertising began and had time to influence travel among visitors who stayed in paid lodging.
- In addition, Oceanside trips with the primary purpose of visiting family/friends are not counted as ad-influenced. This approach is the industry standard, as it is conservative, easily understood, transparent and defensible.



Incremental Travel

- VO advertising influenced Oceanside leisure travel, generating a 2.1% travel increment.
- Next, this level of incremental travel is applied to ad-aware households to estimate ad-influenced trips.

Visited Oceanside April - September 2025



Ad-Influenced Trips

- VO advertising influenced about 64,000 leisure trips from the target markets between April and September 2025.

	April – September 2025
Target HHs	8,797,675
Ad Awareness	35%
Ad-Aware HHs	3,046,950
Incremental Travel	2.1%
Ad-Influenced Trips	64,264

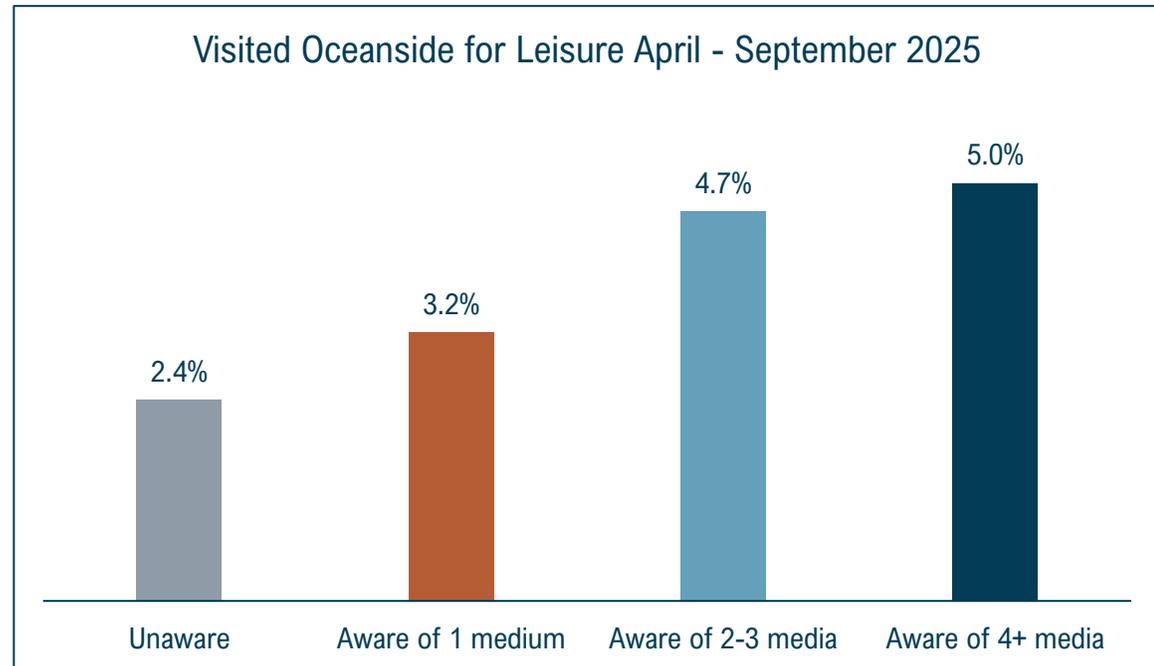
Ad-Influenced Visitor Spending & ROI

- Ad-aware visitors spent \$1,433 on average on their trip to Oceanside. When applied to ad-influenced trips, this shows the advertising influenced about \$92 million in visitor spending from April through September 2025.
- With a media investment of \$623,867, the advertising returned \$148 in visitor spending for each \$1 invested.

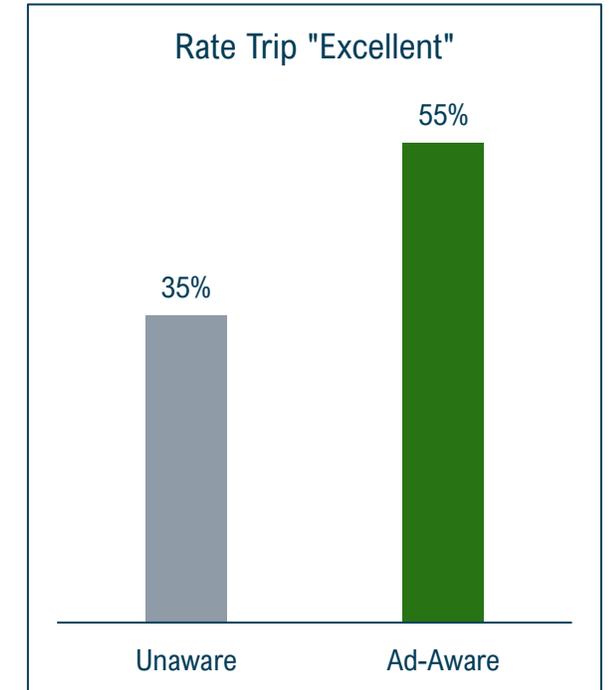
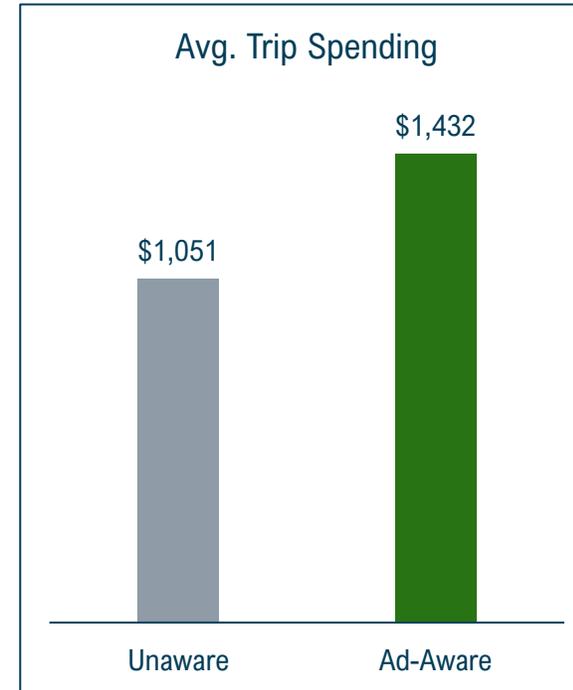
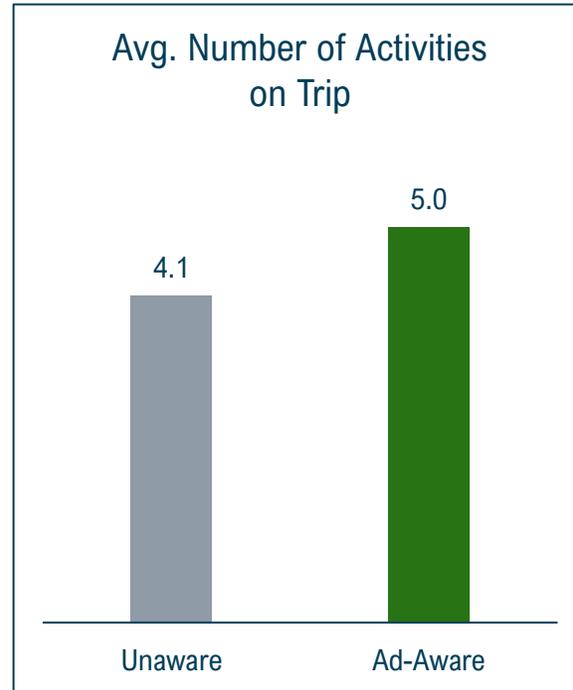
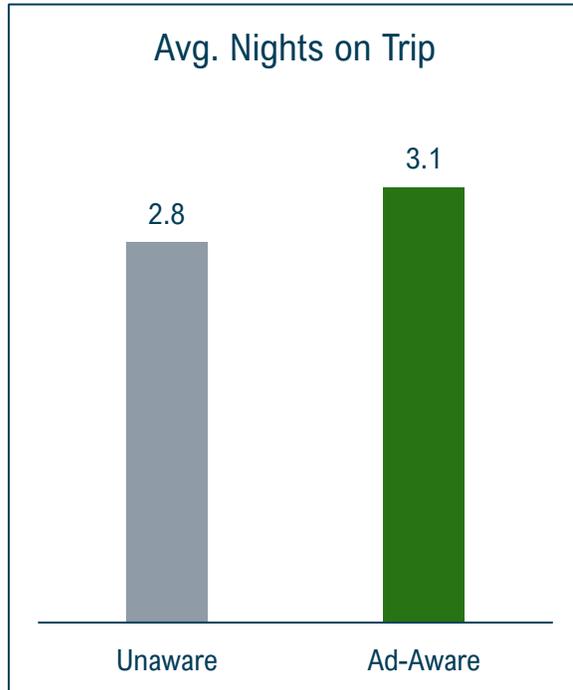
	April – September 2025
Ad-Influenced Trips	64,264
Avg. Trip Spending Among Ad-Aware Visitors	\$1,433
Ad-Influenced Trip Spending	\$92,061,348
Media Investment	\$623,868
ROI	\$148

Paid Media Overlap Influence

- Exposing consumers to ads in 1 medium resulted in additional Oceanside travel that would not have otherwise occurred. The strongest ad impact is among those aware of ads in multiple media.
- As reviewed earlier, half of the ad-aware consumers recall seeing ads in over 4 media and nearly 80% recall seeing over 2.
- This result highlights the importance of prioritizing overlap when developing future media plans.



Ad Influence on Trip



- Not only does the advertising influence Oceanside visits, but it also leads to longer, more active, better trips with higher visitor spending. In other words, the advertising proves effective at all stages of the travel cycle – the Wave 1 research revealed positive ad impact on perceptions and intent, and this Wave 2 research reveals positive impact on travel and the trip experience.

Paid, Owned, Earned Influence

- In addition to the paid advertising, VO has earned and owned assets that were tested in this research including the website, email marketing, social media accounts/posts, the visitor guide, and print/online articles.
- Including the owned and earned assets in the awareness and impact calculations shows over a million more aware households, nearly twice as many influenced trips, and about \$75 million more in influenced visitor spending over the paid advertising alone.

	Paid Only	Paid, Owned, Earned
Target HHs	8,797,675	8,797,675
Paid, Owned, Earned Awareness	35%	47%
Aware HHs	3,046,950	4,117,563
Incremental Travel	2.1%	2.9%
Influenced Trips	64,264	119,331
Avg. Trip Spending Among Aware Visitors	\$1,433	\$1,404
Influenced Trip Spending	\$92,061,348	\$167,556,478

Influenced Paid Lodging Nights and Revenue

- Influenced paid lodging nights are estimated by considering total influenced trips, the percentage of visitors using paid lodging, average nights on trip, and average nightly rates.
- The paid media influenced about 194,000 paid lodging nights and \$42 million in paid lodging revenue.
- Paid, earned, and owned media combined influenced about 342,000 paid lodging nights and \$70 million in paid lodging revenue.
- More detailed calculations by paid lodging type are included in the appendix.

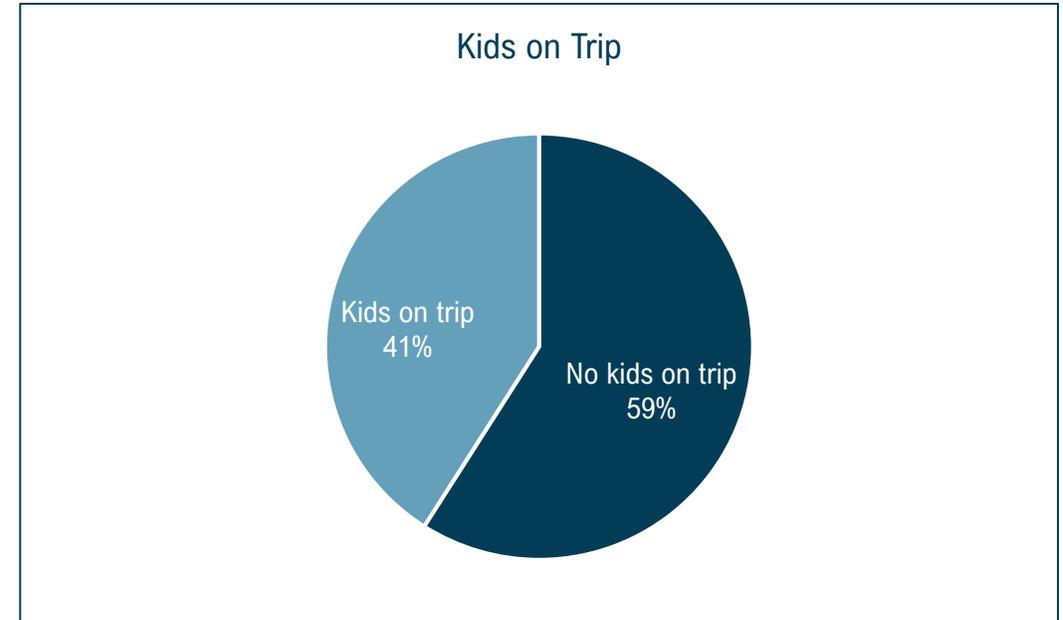
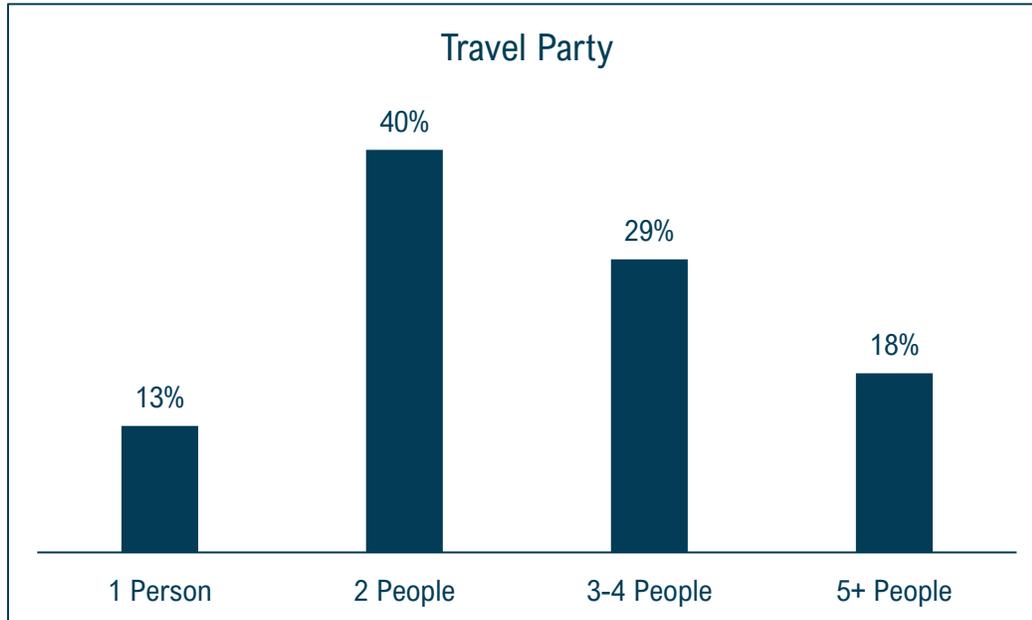
	Paid Only	Paid, Owned, Earned
Total Influenced Trips	64,264	119,331
% Using Paid Lodging	90%	90%
Influenced Trips with Paid Lodging	57,746	106,848
Avg. Nights on Trip	3.4	3.2
Influenced Paid Lodging Nights	193,814	341,580
Avg. Lodging Cost per Night	\$216	\$205
Influenced Paid Lodging Revenue	\$41,896,978	\$69,927,927

Trip Specifics



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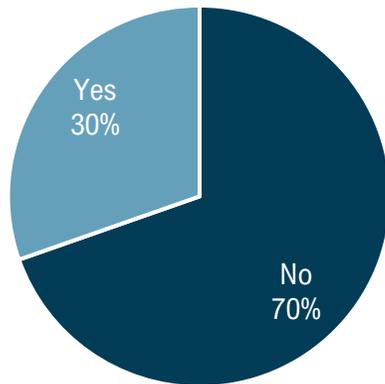
Travel Party



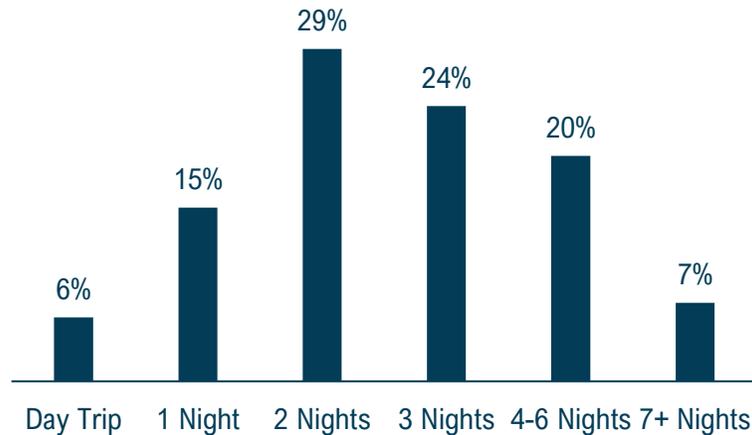
- The most common travel party consists of couples (two people), followed by groups of three to four, which are likely nuclear families.
- About 4 in 10 Oceanside travel parties include children.

Trip Details

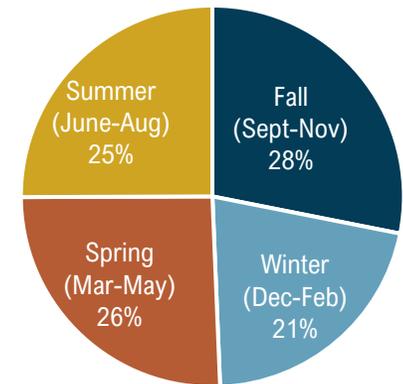
First Trip to Oceanside



Average Number of Nights



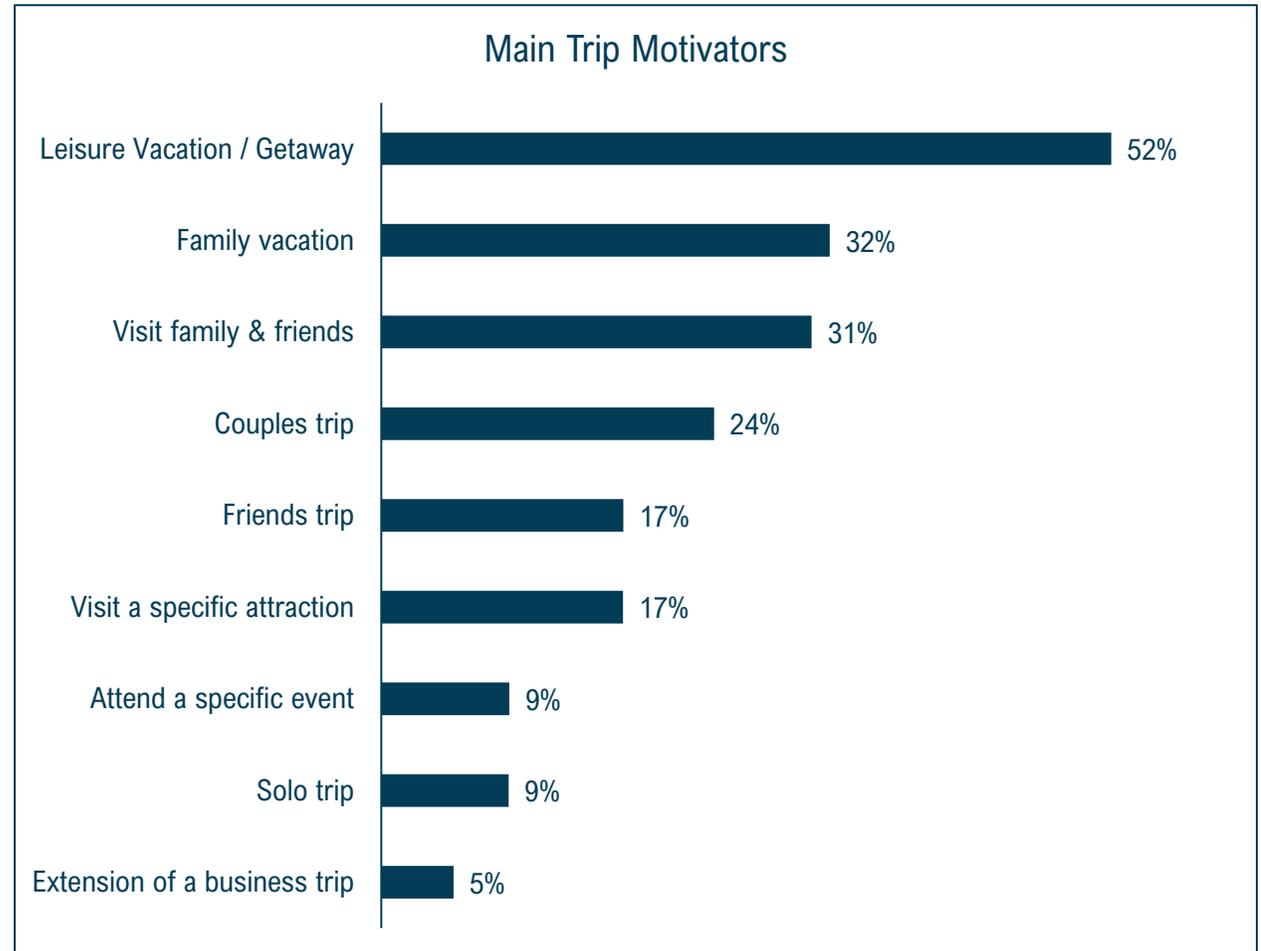
Trip Visitation by Season



- 70% of Oceanside visits are repeat visitation.
- Over 50% of trips are 2-3 nights.
- Visitation was fairly evenly distributed across the seasons, but winter had the lowest visitation.

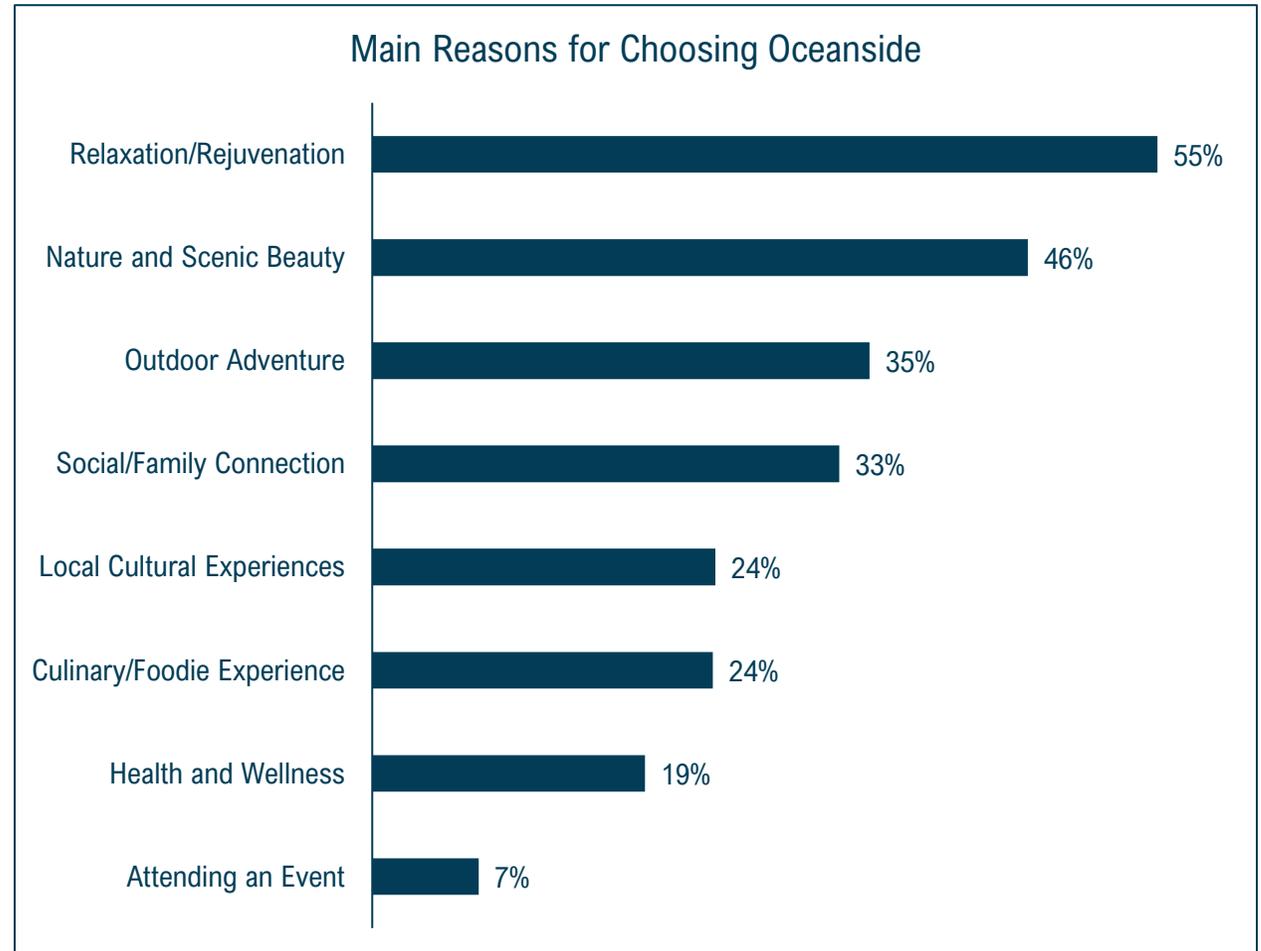
Main Motivators

- Over half of visitors cited leisure vacation as their main motivation for visiting Oceanside.
- Family vacations and visiting friends and relatives were also among the top motivators, though these motivators are not mutually exclusive and often overlap.
- Visitors are primarily motivated to travel in groups, with only 9% indicating motivation for solo trips.
- Among those whose main motivation was visiting family and friends, 22% have family and friends stationed at Camp Pendleton (not pictured in chart).



Main Reason for Visit

- Visitors are most likely to choose Oceanside for relaxation, the scenic beauty, outdoor adventure, and family connection.



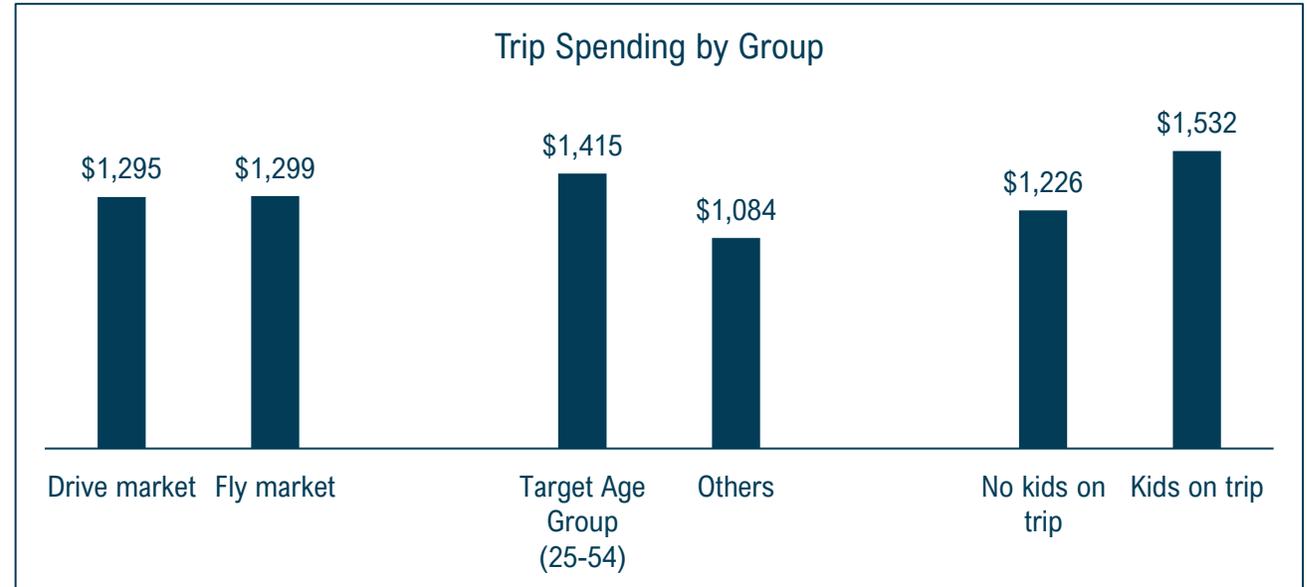
Trip Activities

- Oceanside visitors were asked which activities they participated in on their trip. They were then asked which of these activities motivated their trip.
 - The “Motivated” column shows how many people who participated in each activity were motivated to travel by it.
 - The “Net Motivation” column shows what percent of all Oceanside trips were motivated by the activity.
- Visiting the beach is the top motivation for visitors to Oceanside at over 50%, with the Oceanside Pier the next most common motivator at 24%.
- Scenic drives, shopping, visiting the harbor, and seeking out a culinary experience also motivate over 10% of trips.

	Participated	Motivated	Net Motivation
Visited the Beach	68%	77%	52%
Visited the Oceanside Pier	50%	49%	24%
Scenic drive	39%	57%	22%
Shopping	53%	35%	19%
Visited the Harbor	38%	39%	15%
A culinary experience (local culinary hot spot or food tour)	31%	46%	14%
Visited a museum, the Mission, or historical site	20%	45%	9%
Attended a concert	12%	66%	8%
Visited a brewery or craft cocktail bar	20%	31%	6%
Water sports such as kayaking and stand up paddleboarding	12%	50%	6%
Boating/sailing	9%	61%	6%
Hiking	16%	33%	5%
Visited Camp Pendleton	9%	53%	5%
Visited a place that was the site of a film or TV show	10%	44%	5%
Whale Watching	10%	45%	4%
Visited the agricultural area (winery, farm, or agritourism experience)	9%	43%	4%
Attended a spectator sporting event	5%	65%	3%
Golfing	9%	33%	3%
Fishing	9%	30%	3%
Attended a cultural festival or event	9%	30%	3%
Road biking	7%	31%	2%
Surfing	8%	24%	2%
Participated in a sporting event	4%	33%	1%
Explored public murals	10%	0%	0%
Skydiving	1%	0%	0%

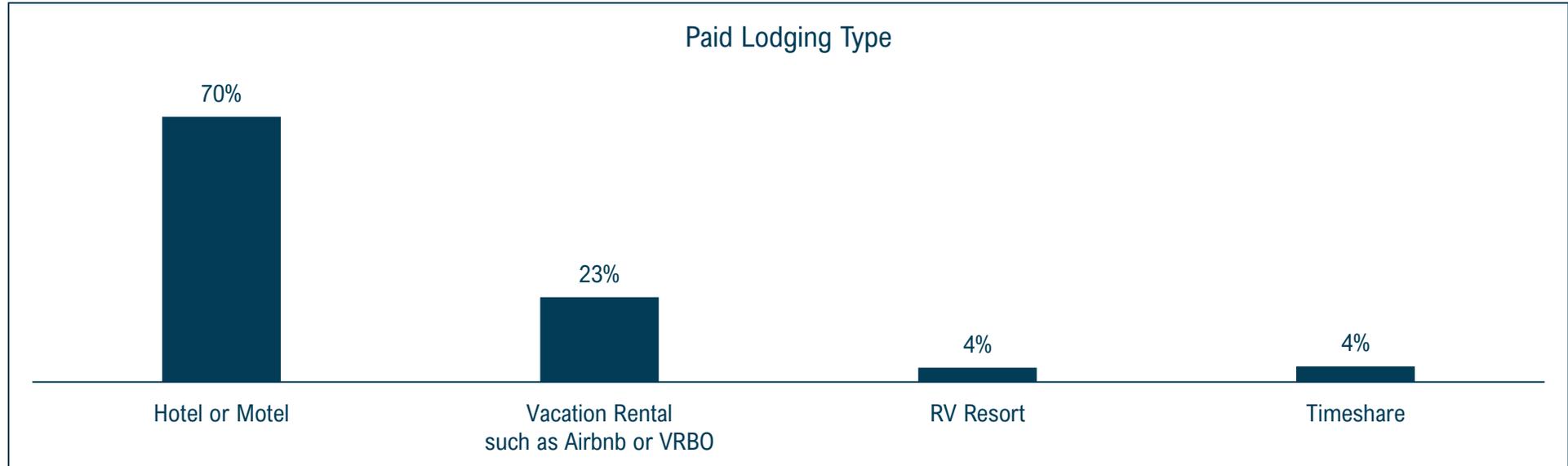
Trip Spending

Trip Spending Category	Average Spend
Lodging/Accommodations	\$408
Food	\$316
Shopping	\$210
Transportation such as gasoline, auto rental, flight, etc.	\$159
Entertainment/Attractions	\$146
Other	\$57
Total	\$1,297



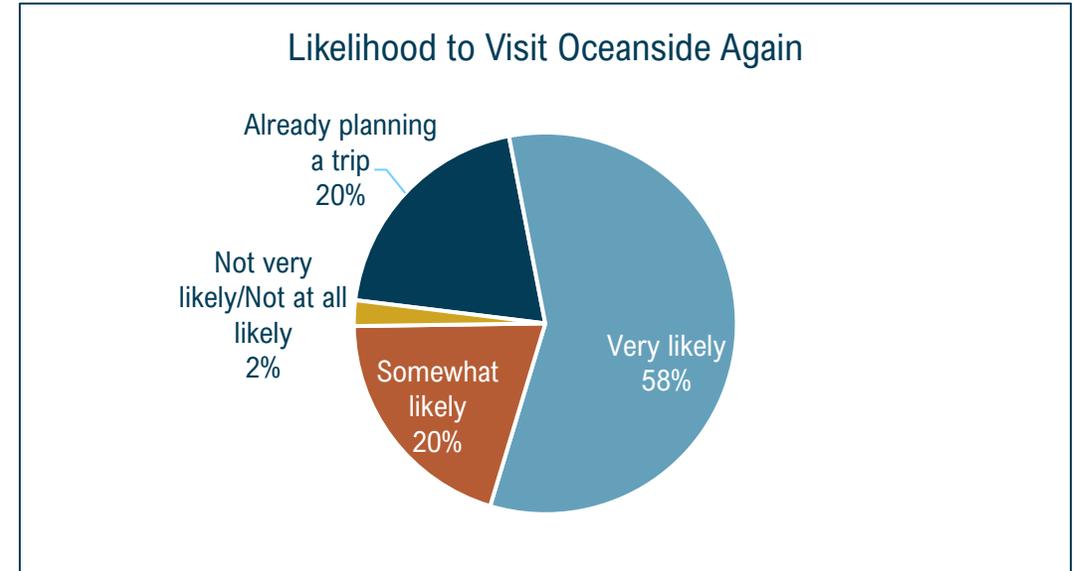
- Oceanside visitors spend an average of \$1,297 with the largest portion going to lodging and accommodations.
- Those traveling with kids have the highest average trip spend. While this group is smaller in number than those without kids, their trips tend to deliver higher value and greater overall spending impact.
- Those in the target age group also spend more on average than others.

Paid Lodging Type



- Most visitors stay in a hotel when visiting Oceanside, followed by vacation rental. These are not mutually exclusive, so there is some overlap in the type of properties where visitors stay.

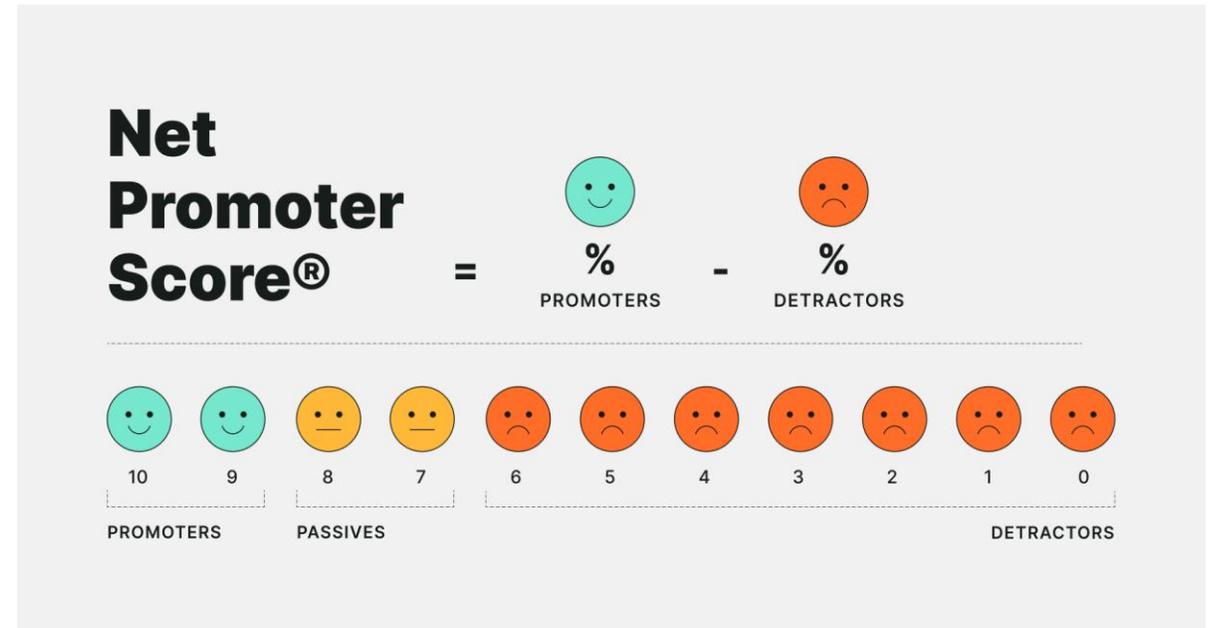
Likelihood to Visit and Rating



- Oceanside visitors were overwhelmingly positive about their travel experience, with no one indicating that they had a poor or fair time.
- The positive experiences visitors have on their Oceanside trips encourages them to visit again, with 78% of visitors already planning a return trip or very likely to visit within a year.

Net Promoter Score

- A Net Promoter Score (NPS) measures how likely someone is to recommend a destination, brand, or experience to others. It is a key indicator of satisfaction and loyalty.
- Respondents rate their likelihood to recommend on a 0-10 scale.
 - **Promoters (9-10)** are loyal advocates who actively recommend.
 - **Passives (7-8)** are satisfied but unenthusiastic and unlikely to promote.
 - **Detractors (0-6)** are dissatisfied visitors who may discourage others.
- When interpreting the score, below 0 usually indicates more negative or unsatisfied visitors, 0 or above is generally positive, 30+ is strong, and 50+ is excellent.



Oceanside Net Promoter Score

Net Promoter Score



- Oceanside's NPS is 37.
- As mentioned on the previous slide, this is considered a strong score. Keep in mind that this score reflects visitors who already view your destination favorably and are more likely to visit, so it represents perceptions among your engaged audience rather than the broader market.
- This indicates a solid base of engaged visitors who can help drive positive word-of-mouth and future visitation.

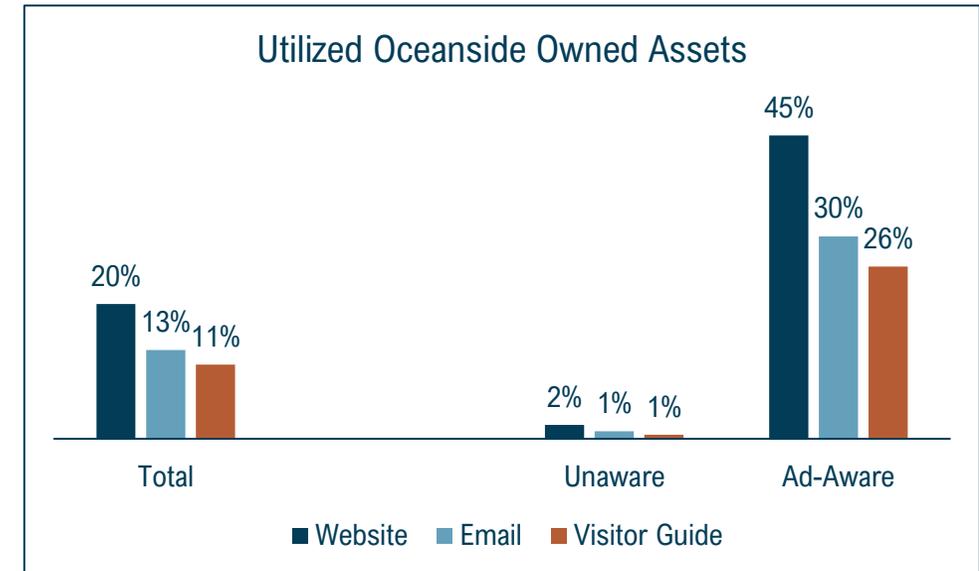
Appendix: Organic and Earned Media



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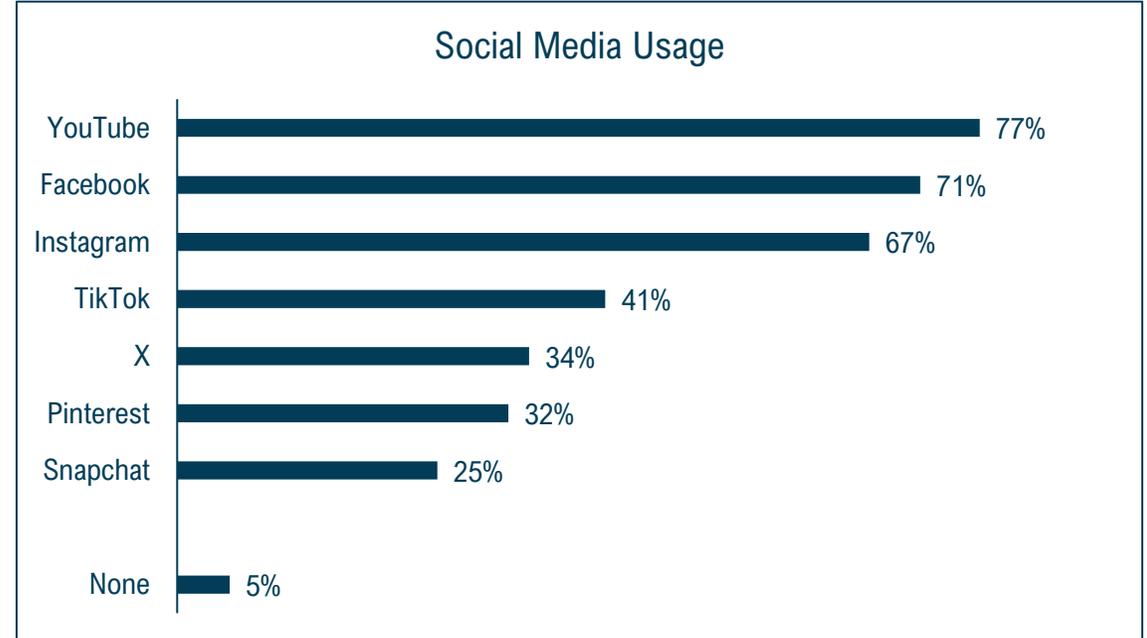
Oceanside Owned Assets

- The Visit Oceanside website is the most utilized owned asset, with 20% of respondents having visited the website.
- Nearly all respondents who engaged with Oceanside's owned assets, such as visiting the website, receiving an email, or requesting the visitor guide, were also aware of the paid efforts. This shows that paid advertising is successfully prompting further engagement with Oceanside's owned channels.



Social Media Usage

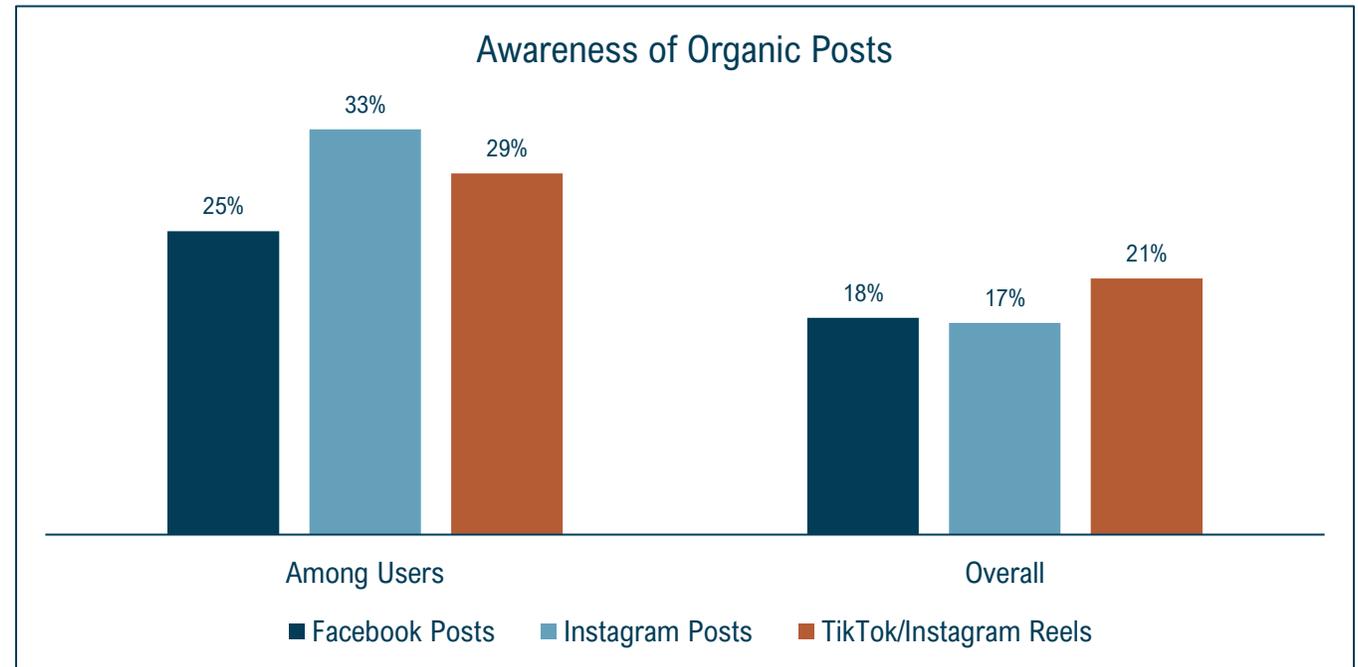
- Respondents were asked which social media platforms they use. YouTube has the highest usage, followed closely by Facebook and Instagram.
- Only 5% of consumers say they do not use any of the social media platforms provided.
- When comparing platforms by generation and Oceanside’s target age group, usage patterns differ significantly.
- Looking more closely at the three platforms asked about in relation to Oceanside’s following and organic posts (Facebook, Instagram, and TikTok), we can see how these differences play out across age groups.
- Gen Z is most likely to use Instagram and TikTok, and the least likely among all groups to use Facebook.
- Gen X is most likely to use Facebook.
- Oceanside’s target age group has the highest usage of Instagram (81%) followed by Facebook (75%).



	Gen Z	Millennials	Gen X	Boomers	Target Age Group	Others
Facebook	44%	76%	80%	72%	75%	67%
Instagram	89%	82%	70%	38%	81%	49%
TikTok	73%	56%	39%	14%	53%	26%

Social Media Organic Awareness

- Respondents were only asked about specific organic posts if they indicated they use that platform.
- Among users of the platforms, the Instagram posts have the highest recall.
- Overall, about 1 in 5 leisure travelers recall seeing these posts/reels.



Social Media Organic Influence

- Much like media overlap, the combination of paid and organic marketing has a greater influence on Oceanside travel than paid advertising alone – highlighting the importance of reaching consumers with both types of media.

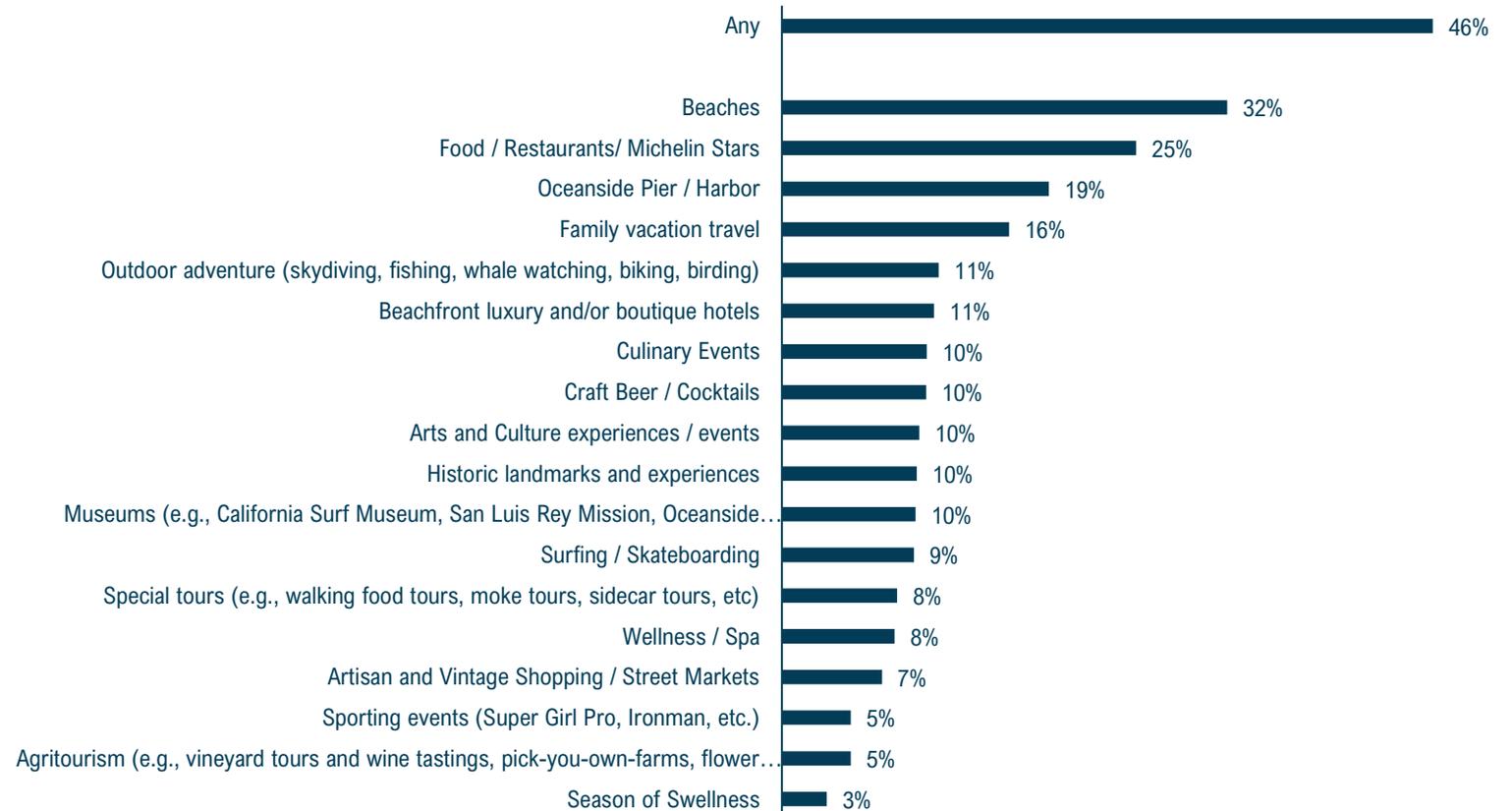


*Small sample size, should be considered directional rather than definitive.

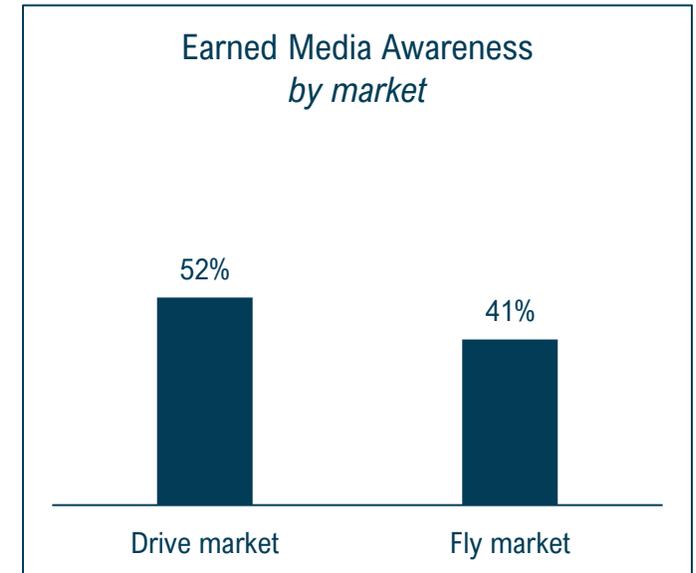
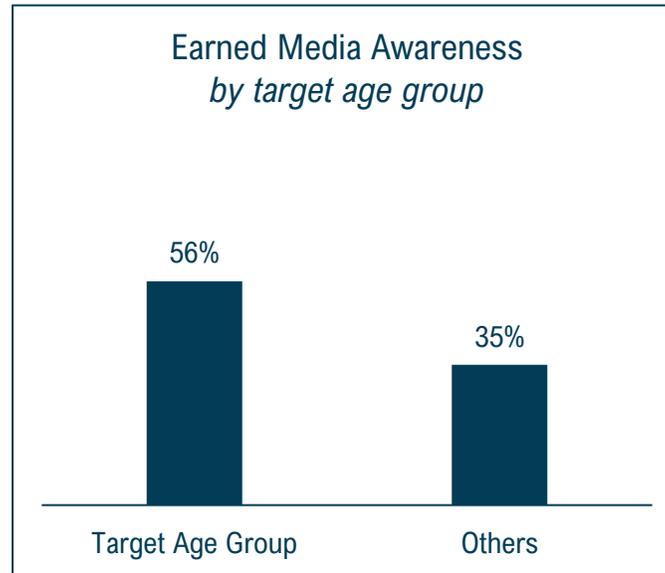
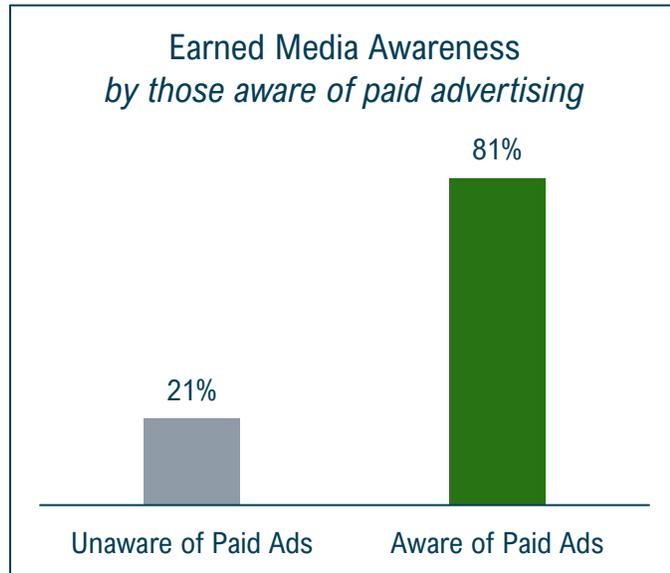
Earned Media Awareness

- Just under 50% of respondents recall reading any article about Oceanside.
- They have the strongest recall of articles featuring beaches, food, the Oceanside Pier/Harbor, and family vacation travel.
- In the next slide, we'll look closer at what groups had more awareness of Visit Oceanside's earned media articles.

Awareness of Earned Media Articles

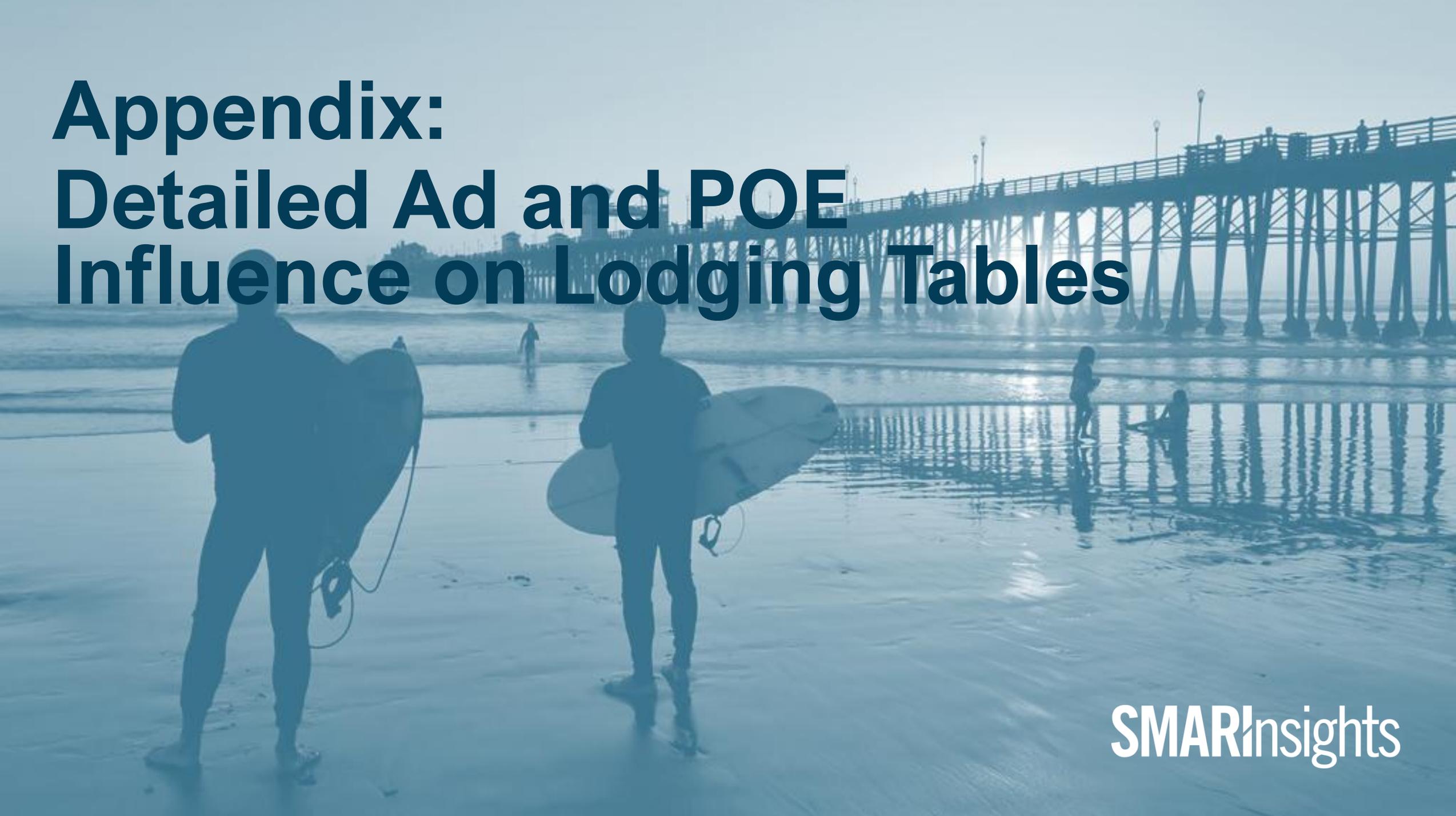


Earned Media Awareness by Group



- Awareness of paid and earned media tend to go hand in hand. Over 80% of those aware of the paid ads were also aware of the earned media articles, compared to only 21% of those unaware of the paid ads. This highlights the importance of using both channels; earned media not only can help fill gaps left by paid efforts but also reinforces brand recognition among those already exposed to advertising.
- Those within the target age group and those within the drive market have higher awareness of the earned media articles.

Appendix: Detailed Ad and POE Influence on Lodging Tables



Paid Media Influence

Ad Aware Incremental						
	Hotel Stay	STR stay	Total Paid Lodging	VRF*	Day Trip	Total Influenced Trips
Paid advertising influenced trips with paid lodging	57,746	57,746	57,746			
% of aware visitors staying in lodging type	75%	25%	100%			
Influenced trips with lodging type stay	43,285	14,461	57,746	6,518		64,264
Avg. number of nights on trip	3.2	3.8	3.4	3.5		
Influenced lodging type nights	138,650	55,164	193,814	22,834		
Avg. lodging cost per night	\$167	\$339	\$216	\$0		
Influenced lodging type revenue	\$23,200,182	\$18,696,796	\$41,896,978	\$0		

	Hotel Stay	STR stay	Total Paid Lodging	VRF*	Day Trip
Lodging/Accommodations	\$536	\$1,293	\$726	\$0	\$0
Food	\$363	\$279	\$356	\$372	\$148
Shopping	\$231	\$237	\$232	\$213	\$29
Transportation such as gasoline, auto rental, flight, etc.	\$203	\$138	\$188	\$193	\$28
Entertainment/Attractions	\$166	\$174	\$171	\$209	\$48
Other	\$87	\$91	\$83	\$53	\$11
Total trip spend	\$1,585	\$2,212	\$1,756	\$1,041	\$265

*VRF includes other non-paid lodging, though most non-paid stays were to visit relatives or friends.

Paid, Earned, Owned Media Influence

NET POE Incremental						
	Hotel Stay	STR stay	Total Paid Lodging	VRF*	Day Trip	Total Influenced Trips
POE influenced trips with paid lodging	106,848	106,848	106,848			
% of aware visitors staying in lodging type	82%	18%	100%			
Influenced trips with lodging type stay	87,152	19,696	106,848	12,483		119,331
Avg. number of nights on trip	3.0	3.9	3.2	3.6		
Influenced lodging type nights	264,845	76,735	341,580	44,703		
Avg. lodging cost per night	\$171	\$320	\$205	\$0		
Influenced lodging type revenue	\$45,393,964	\$24,533,963	\$69,927,927	\$0		

	Hotel Stay	STR stay	Total Paid Lodging	VRF*	Day Trip
Lodging/Accommodations	\$521	\$1,246	\$654	\$0	\$0
Food	\$345	\$299	\$346	\$360	\$81
Shopping	\$234	\$271	\$242	\$242	\$13
Transportation such as gasoline, auto rental, flight, etc.	\$184	\$147	\$177	\$179	\$46
Entertainment/Attractions	\$161	\$195	\$170	\$195	\$5
Other	\$75	\$88	\$73	\$53	\$3
Total trip spend	\$1,520	\$2,244	\$1,663	\$1,029	\$148

*VRF includes other non-paid lodging, though most non-paid stays were to visit relatives or friends.

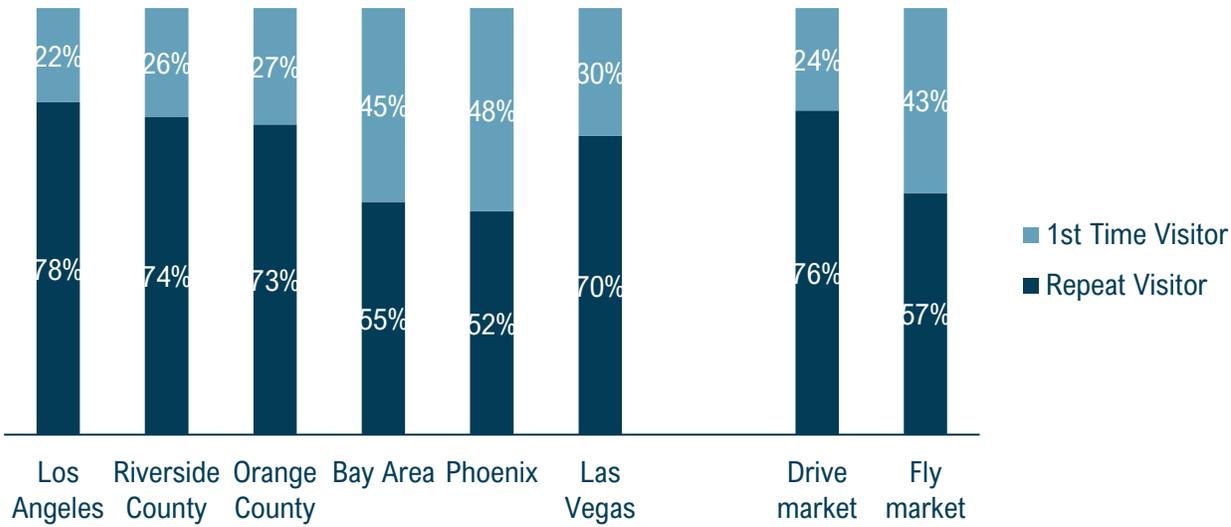
Appendix: Follow-ups



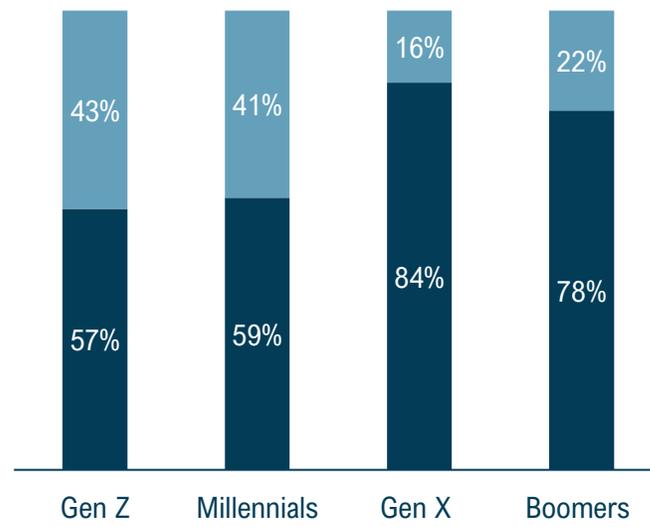
SMARinsights

Repeat Visitation

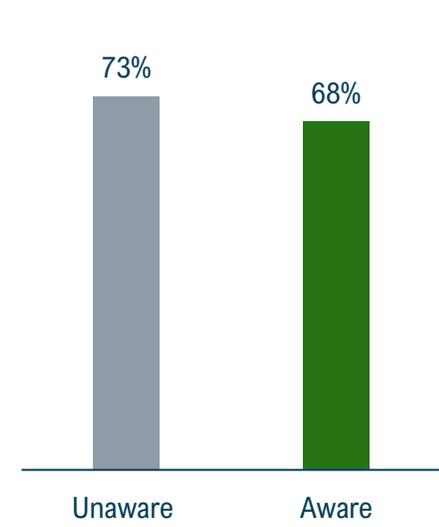
Repeat Visitation by Market



Repeat Visitation by Generation

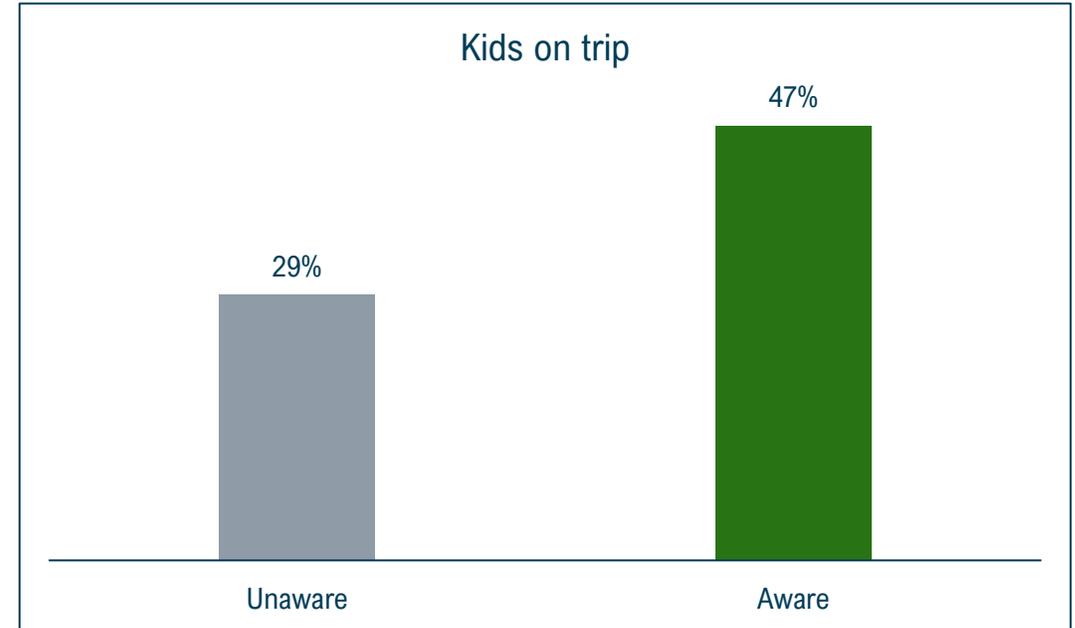
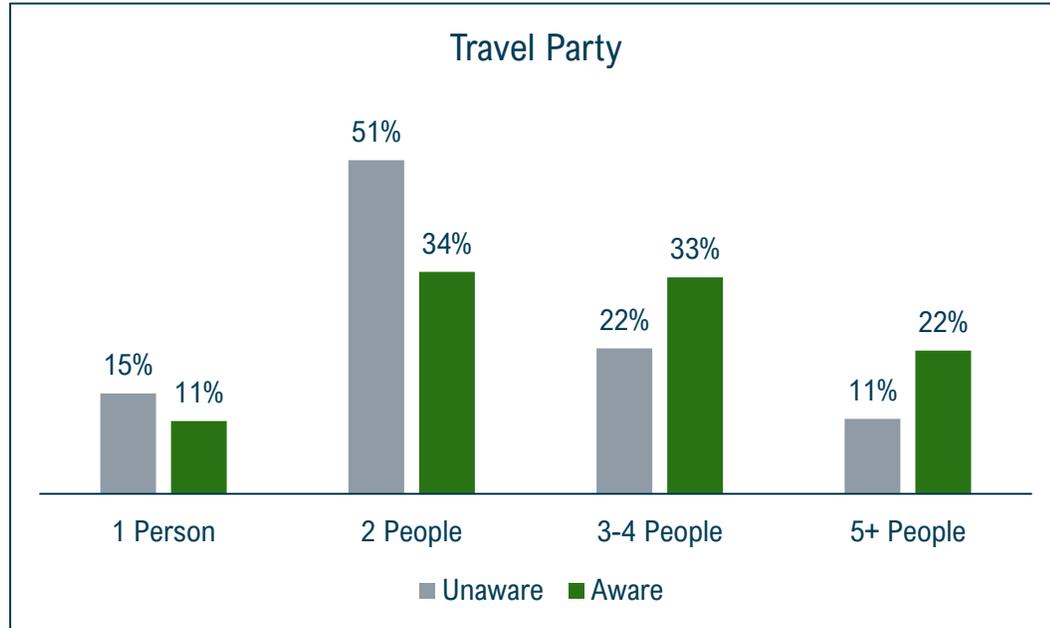


Repeat Visitors



- Those with a closer proximity to Oceanside are more likely to be repeat visitors, with only one in four respondents visiting for the first time.
- Then GenX generation is most likely to be a repeat visitor followed closely by Boomers.
- First time visitation is slightly higher among those aware of the ads.

Travel Party by Aware and Unaware

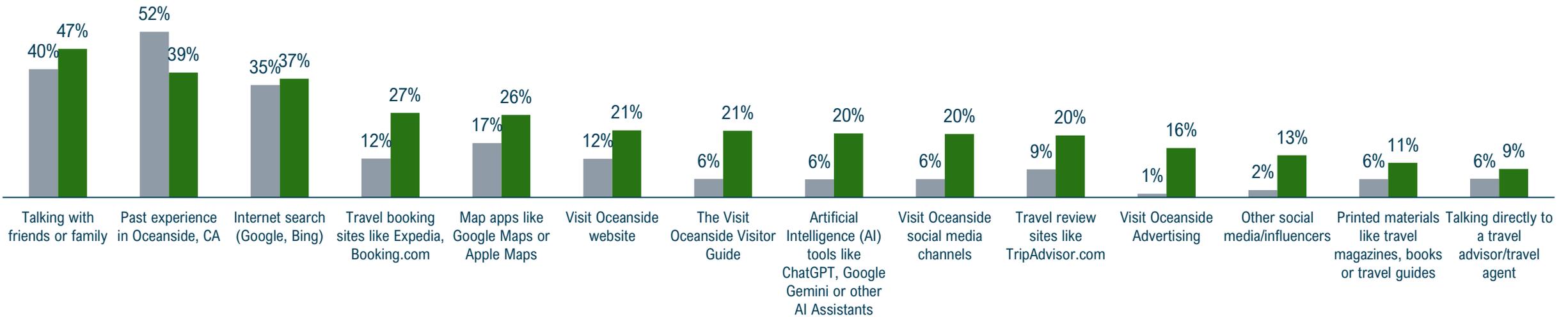


- Those who are aware of the ads are more likely to travel in larger groups, with 55% of ad-aware parties including more than three people.
- They are also more likely to be families with nearly 50% having kids on their trip.

Trip Planning Resources by Aware and Unaware

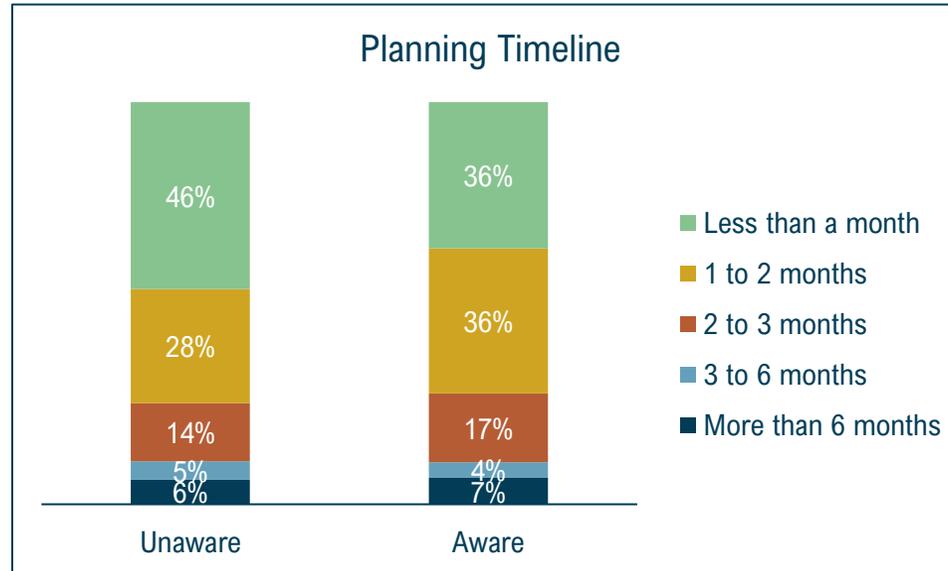
Trip Planning Resources

■ Unaware ■ Aware



- Ad-aware visitors use all trip-planning resources at higher rates except for those relying on their past experiences.

Planning Timeline by Aware and Unaware



- Those who are aware of VO's ads begin planning their trips farther in advance than those who are unaware.
- Just under half of unaware visitors started planning within a month of their trip.

Main Motivators by Aware and Unaware

- Visitors who were aware of advertising are more likely to be taking a family vacation, friends trip or visiting a specific attraction than those who are unaware of their ads.
- Those who are unaware of the ads have a higher motivation to visit their family and friends.
- It is important to note that these motivations are not mutually inclusive, and respondents were able to chose multiple motivators.

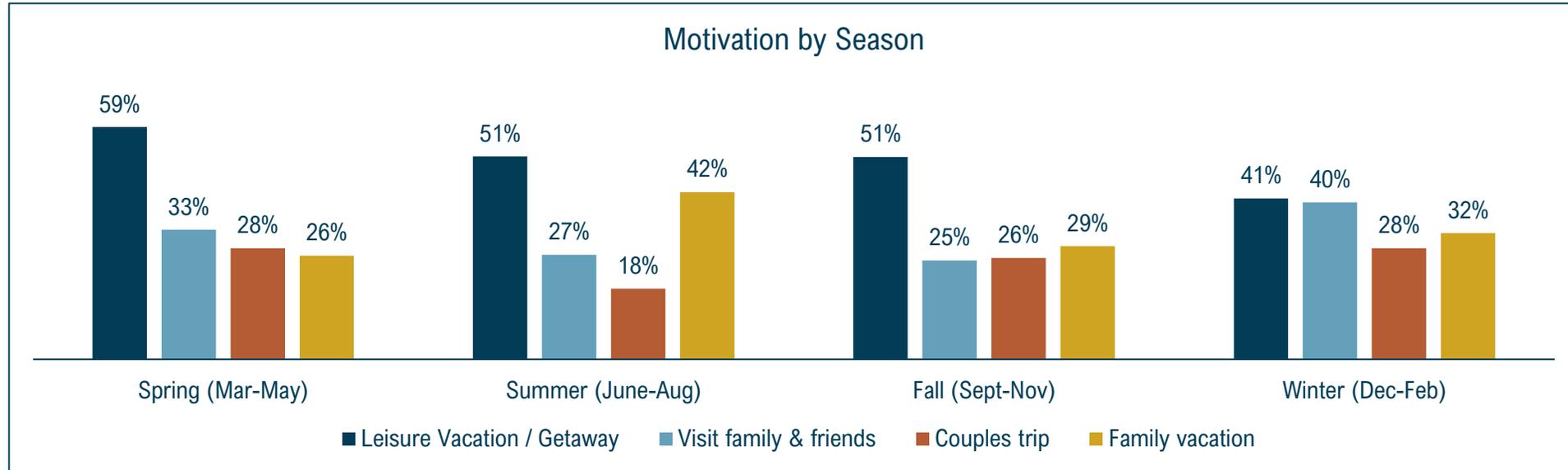
	Unaware	Aware	% Point Difference
Family vacation	20%	38%	18%
Friends trip	12%	20%	8%
Visit a specific attraction	14%	19%	6%
Solo trip	7%	10%	4%
Leisure Vacation / Getaway	49%	53%	4%
Extension of a business trip	4%	6%	2%
Attend a specific event	8%	10%	2%
Couples trip	24%	24%	0%
Visit family & friends	39%	26%	-13%

Main Reason for Visit by Aware and Unaware

	Unaware	Aware	% Point Difference
Outdoor Adventure	23%	41%	18%
Nature and Scenic Beauty	36%	51%	15%
Local Cultural Experiences	15%	29%	13%
Health and Wellness	14%	22%	9%
Relaxation/Rejuvenation	52%	57%	6%
Culinary/Foodie Experience	21%	25%	4%
Social/Family Connection	32%	33%	1%
Attending an Event	8%	7%	-0.1%

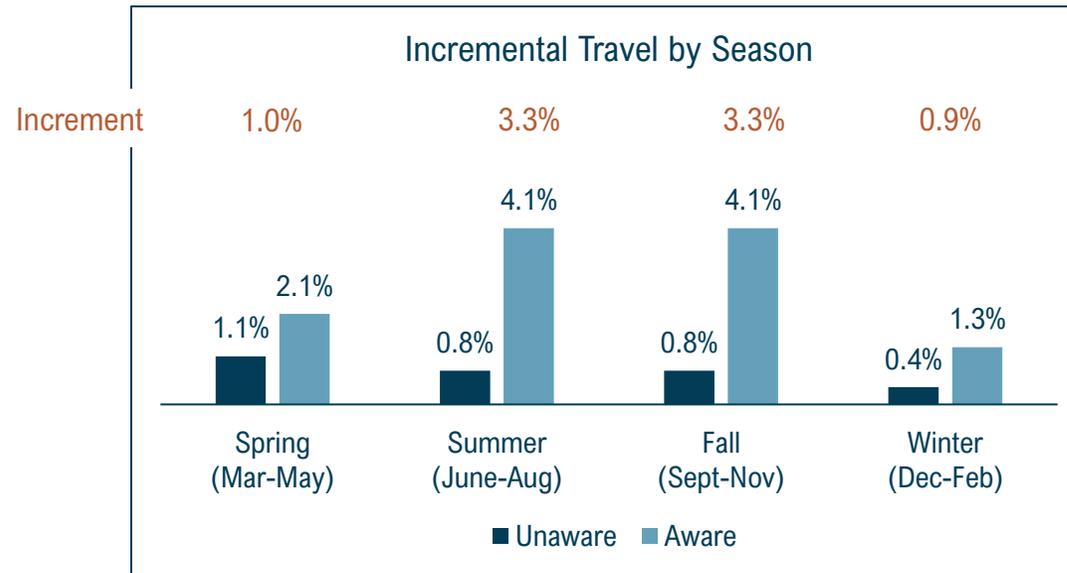
- Visitors who are aware of the advertising are most likely to chose Oceanside for it's outdoor adventure, scenic beauty, and cultural experiences.

Seasonality



- Overall, taking a leisure vacation or getaway is the highest motivation across all season.
- However, there are differences among the other leading motivators by season. Summer visitors are more likely than those in other seasons to be taking a family vacation while also being less likely to take a couple's trip. Winter travelers are more likely to be visiting friends and family.

Seasonal Travel by Aware and Unaware



- Visit Oceanside has the highest level of ad influence in the summer and fall.
- During the winter, the ads have the lowest level of influence, which is expected given that one of the main motivations for travel during this season is visiting friends and family.

Visitor Distribution by Generation

	Target HH Population	Oceanside Visitors	Index
Gen Z	13%	12%	96
Millennials	33%	41%	124
Gen X	24%	28%	116
Boomers +	30%	18%	62

- Millennials make up the largest share of visitors to Oceanside, while Gen Z represents the smallest.
- Millennials and Gen X over-index compared to their representation in the target household population.
- On the other hand, Boomers are less likely to be visitors.

Destination Comparisons

	Target Household Base	Awareness	Aware HHs	Media Budget	Cost per Aware HH	ROI
A	5,500,000	40%	2,200,000	\$1,800,000	\$0.82	\$88
B	4,900,000	34%	1,600,000	\$1,800,000	\$1.13	\$116
C	9,600,000	53%	5,300,000	\$1,670,859	\$0.33	\$117
D	4,125,469	42%	1,734,073	\$918,530	\$0.53	\$118
Oceanside	11,440,410	35%	3,046,950	\$623,868	\$0.20	\$148
E	6,500,000	45%	2,900,000	\$656,694	\$0.23	\$195
F	22,520,230	41%	9,188,690	\$1,235,500	\$0.13	\$217
G	16,200,000	25%	4,050,000	\$675,000	\$0.17	\$466
Avg.	10,098,264	39%	3,752,464	\$1,172,556	\$0.44	\$183

**The cost per aware household benchmark referenced earlier in the report includes more cases.*

- When evaluated against recent comparable cases, Oceanside has a better than average cost per ad-aware household and an ROI that is in the middle of the pack.

Appendix: Questionnaire

SMARinsights

Questionnaire

Oceanside CA
2025 Ad Effectiveness and ROI Research
Wave 2 (ROI)
September 2025

SCREENER MODULE

ZIP. What is your ZIP code? _____

51. Please indicate which of the following describes you.

ROTATE	Yes	No
I regularly use social media like Facebook, X (formerly known as Twitter), Instagram, or TikTok		
I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home		
I regularly engage in some form of physical exercise like walking, biking or participating in sports to help stay healthy		
I use video streaming services like Prime Video, Disney+, AppleTV+, Netflix, Max, or Hulu		
I am currently planning or have already planned an upcoming leisure trip		
I like to experience live music when I travel		

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

- Me
- Me and my spouse/partner
- My spouse/partner

53. What is your age? _____

54. – Which of the following social networking sites do you use? *Select all that apply.*

- ROTATE
- Facebook
 - X
 - YouTube
 - Instagram
 - Snapchat
 - Pinterest
 - TikTok
 - None

TERMINATE IF ANY:
S1_2 and S1_5 = NO
S2 = 3
S3 < 18

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1

BRAND HEALTH MODULE

2. How likely are you to take a leisure trip to any of the following destinations in the next year?

ROTATE	Not at all likely	Not very likely	Somewhat likely	Very likely	Already planning a trip
Oceanside					
Carlsbad					
Dana Point					
Huntington Beach					
Laguna Beach					
San Clemente					
San Diego					

ASK Q2A IF SELECTED AT LEAST VERY LIKELY FROM Q2.

2a. You indicated you are already planning a trip to Oceanside, CA. What month(s) do you plan to visit? (select all that apply)

- October 2025
- November 2025
- December 2025
- January 2026
- February 2026
- March 2026
- April 2026
- May 2026
- June 2026
- July 2026
- August 2026
- September 2026
- October 2026

3. Which of the following destinations have you visited for a leisure trip in the past year?

ROTATE	
Oceanside	
Carlsbad	
Dana Point	
Huntington Beach	
Laguna Beach	
San Clemente	
San Diego	
None of these	

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TRAVEL MODULE

[ASK TRAVEL QUESTIONS IF Q3 OCEANSIDE = 1. IF Q3 OCEANSIDE DOES NOT = 1, SKIP TO AD AWARENESS]

3a. Was this your first trip to Oceanside, CA?

- Yes
- No

3b. How likely are you to visit Oceanside, CA again in the future?

Not at all likely	Not very likely	Somewhat likely	Very likely	Already planning a trip

4. How likely are you to recommend Oceanside, CA to friends or family?

Not at all likely	1	2	3	4	5	6	7	8	9	Extremely likely
0										10

Now, please give us some information about the leisure trip(s) you took in the past year to Oceanside, CA.

8. What month(s) did you visit Oceanside, CA. Select all that apply.

- September 2024
- October 2024
- November 2024
- December 2024
- January 2025
- February 2025
- March 2025
- April 2025
- May 2025
- June 2025
- July 2025
- August 2025
- September 2025

[IF MULTIPLE TRIPS: DISPLAY MONTH/YEARS SELECTED IN 8]

8a. Which of these Oceanside, CA trips do you consider to be your primary trip, where you stayed the longest and did the most?

SHOW ALL MONTHS VISITED OCEANSIDE, CA FROM 8.

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Questionnaire

Now, we're going to ask some questions about your MONTH AND YEAR trip to Oceanside, CA. IF ONE MONTH, SHOW THAT MONTH. IF MULTIPLE MONTHS, SHOW THE "PRIMARY TRIP" MONTH FROM 8a.

9. How far in advance did you begin to plan your MONTH AND YEAR trip to Oceanside, CA?
- Less than a month
 - 1 to 2 months
 - 2 to 3 months
 - 3 to 6 months
 - More than 6 months

10. Overall, how would you rate the experience you had in Oceanside, CA?
- Excellent
 - Very good
 - Good
 - Fair
 - Poor

11. What were your main motivators for this trip? Please mark all that apply.

- Visit family & friends
- Visit a specific attraction
- Attend a specific event
- Family vacation
- Extension of a business trip
- Friends trip
- Couples trip
- Solo trip
- Leisure Vacation / Getaway
- Other, please specify _____ [ANCHOR "OTHER"]

[ASK 11a IF PURPOSE OF VISIT = 1 (Visit family & friends)]

- 11a. Was the family or friend you visited stationed at Camp Pendleton?
- Yes
 - No

- 11b. What was the main reason you chose Oceanside, CA? Please select all that apply
- Health and Wellness
 - Relaxation/Rejuvenation
 - Outdoor Adventure
 - Culinary/Foodie Experience
 - Local Cultural Experiences
 - Nature and Scenic Beauty
 - Social/Family Connection
 - Attending an Event
 - Other, please specify _____

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12. Which of these did you use to get inspiration or gather information for selecting the destination for this trip? Please select all that apply.

[ROTATE, ANCHOR OTHER AND NONE]	
Visit Oceanside Advertising	
Talking with friends or family	
Talking directly to a travel advisor/travel agent	
Visit Oceanside social media channels	
Other social media/influencers	
Visit Oceanside website	
Travel review sites like TripAdvisor.com	
Travel booking sites like Expedia, Booking.com	
Printed materials like travel magazines, books or travel guides	
Internet search (Google, Bing)	
Artificial Intelligence (AI) tools like ChatGPT, Google Gemini or other AI Assistants	
Map apps like Google Maps or Apple Maps	
Past experience in Oceanside, CA	
The Visit Oceanside Visitor Guide	
Other, please specify _____	
None of these	

13. Including you, how many people were on your trip to Oceanside, CA? ____

ASK Q14 IF Q13 >1

14. How many children under the age of 18 were in your travel party? ____

15. How many nights did you stay in Oceanside, CA, on your [MONTH/YEAR] trip? ____

ASK Q16 IF 15 >= 1

16. What form(s) of lodging did you use? Please mark all that apply.

Hotel or Motel	
Vacation Rental such as Airbnb or VRBO	
RV Resort	
Timeshare	
Personal Vacation Home	
Other, please specify _____	

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- 16a. Please indicate the number of nights you stayed in each lodging type and the average nightly rate you paid in Oceanside, CA.

SHOW TYPES USED	# of Nights	Average Nightly Rate Paid
Hotel or Motel		
Vacation Rental such as Airbnb or VRBO		
RV Resort		
Timeshare		
Personal Vacation Home		
Other, please specify _____		

17. Which of the following activities/attractions did you participate in/visit while on your MONTH AND YEAR trip to Oceanside, CA?

ROTATE	
Surfing	
Hiking	
Road biking	
Water sports such as kayaking and stand up paddleboarding	
Visited the Beach	
Visited a museum, the Mission, or historical site	
Attended a cultural festival or event	
Fishing	
Attended a concert	
Whale Watching	
Golfing	
Visited the Oceanside Pier	
Visited the Harbor	
Skydiving	
Visited the agricultural area (winery, farm, or agritourism experience)	
Visited a brewery or craft cocktail bar	
A culinary experience (local culinary hot spot or food tour)	
Boating/sailing	
Shopping	
Scenic drive	
Explored public murals	
Visited a place that was the site of a film or TV show	
Attended a spectator sporting event	

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Questionnaire

Participated in a sporting event	
Visited Camp Pendleton	
None of these EXCLUSIVE	

SHOW THE ACTIVITIES SELECTED IN Q17 PLUS "NONE" AND ASK:

17a. Please indicate which of these activities were a major influence when deciding to visit Oceanside, CA?

[INSERT ACTIVITIES SELECTED FROM 17]

SPEND1. Please estimate how much you and other members of your travel party spent in total on this trip to Oceanside, CA in each of the following categories.

Lodging/Accommodations	
Food	
Shopping	
Transportation such as gasoline, auto rental, flight, etc.	
Entertainment/Attractions	
Other	
Total	SHOW TOTAL

AD AWARENESS MODULE

Next you will be shown some travel advertisements. Please take a moment to view the ads and answer the questions.

ROTATE APPEARANCE OF MEDIA

DIGITAL DISPLAY

SHOW ALL ON SAME SCREEN AND ASK AWARENESS FOR ALL

I:\Ads Master\Oceanside CA\Paid Media Assets\Display



18. Have you seen any of these or similar ads for Oceanside, CA before?

Yes
No

PERFORMANCE MAX

SHOW ALL ON THE SAME SCREEN AND ASK AWARENESS FOR ALL

I:\Ads Master\Oceanside CA\Paid Media Assets\Performance Max



19a. Have you seen any of these or similar ads for Oceanside, CA before?

Yes
No

SEM

SHOW ALL ON THE SAME SCREEN AND ASK AWARENESS FOR ALL

I:\Ads Master\Oceanside CA\Paid Media Assets\SEM



21. Have you seen any of these or similar ads for Oceanside, CA before?

Yes
No

TRAVEL ZOO

SHOW ALL ON THE SAME SCREEN AND ASK AWARENESS FOR ALL

I:\Ads Master\Oceanside CA\Paid Media Assets\Travel Zoo



23a. Have you seen any of these or similar ads for Oceanside, CA before?

Yes
No

Questionnaire

SOCIAL DISPLAY

ASK IF USE PINTEREST FROM S4:

I:\Ads Master\Oceanside CA\Paid Media Assets\Social\Pinterest



01623622 Spring25 Pinterest 100x150-1



01623622 Spring25 Pinterest 100x150-2



01623622 Spring25 Pinterest 100x150-3



01623622 Spring25 Pinterest 100x150-4

23. Have you seen any of these or similar Pinterest ads for Oceanside, CA before?

Yes
No

ASK IF USE FACEBOOK FROM S4:

I:\Ads Master\Oceanside CA\Paid Media Assets\Social\Facebook



F01



F02



F03



F04



F05



F06

25. Have you seen any of these or similar Facebook ads for Oceanside, CA before?

Yes
No

VIDEO

SHOW THESE TWO VIDEOS TO EVERYONE

Click the play button and watch the video before answering.



Visit Oceanside, Inc.
<https://vimeo.com/1086843745>



Orlando, FL, USA
<https://vimeo.com/1086842938>

RANDOMLY SHOW TWO OF THE FOUR VIDEOS



VISIT OCEANSIDE, INC.
<https://vimeo.com/1086844089>



GOURMET ALUMINUM OF PALM
<https://vimeo.com/1086843997>



VISIT OCEANSIDE, INC.
<https://vimeo.com/1086843144>



OUTDOOR OF PALM
<https://vimeo.com/1086843009>

27. Have you seen this ad or similar video ads for Oceanside, CA before?

I have seen this ad before
I have NOT seen this ad before

Website

I:\Ads Master\Oceanside CA\Paid Media Assets



31. Have you visited the Oceanside, CA tourism website, visitocceanside.org?

Yes
No

Email

I:\Ads Master\Oceanside CA>Email



Emailnewsletter1



Emailnewsletter2



Emailnewsletter3

32. Have you received an email from Visit Oceanside?

Yes
No

Questionnaire

Social Media Platforms

SHOW ALL SOCIAL MEDIA PAGE SCREENSHOTS ON THE SCREEN AND ASK FOR EACH
I:\Ads Master\Oceanside CA\Social\Organic Social Screenshots\USE

ASK Q33a IF USE FACEBOOK FROM S4, Q33b IF USE INSTAGRAM FROM 24, and Q33c IF USE TIKTOK FROM S4.



Facebook Account.jpg

33a. Do you follow Oceanside, CA on Facebook?

- Yes
- No



Instagram Account.jpg

33b. Do you follow Oceanside, CA on Instagram?

- Yes
- No



TikTok Account.jpg

33c. Do you follow Oceanside, CA on TikTok?

- Yes
- No

Social Media Posts –

ASK Q33a1 IF USE FACEBOOK FROM S4, Q33b1 IF USE INSTAGRAM FROM S4, and Q33c1 IF USE TIKTOK OR INSTAGRAM FROM S4.

I:\Ads Master\Oceanside CA\Social\Organic Social Screenshots\USE\Facebook



FB Smari Screenshot - Pier.jpg



FB Smari Screenshot - Stairs.jpg



FB Smari Screenshot - Top Gun.jpg

33a1. Have you seen these or similar Facebook posts for Oceanside, CA before?

- Yes
- No

I:\Ads Master\Oceanside CA\Social\Organic Social Screenshots\USE\IG



IG IMG_2882



IG IMG_2889



IG IMG_2751



IG IMG_2755



Instagram Content Feed

33b1. Have you seen these or similar Instagram posts for Oceanside, CA before?

- Yes
- No

I:\Ads Master\Oceanside CA\Social\Reels

SHOW TWO OF SIX REELS SELECTED RANDOMLY.

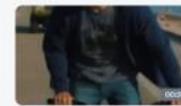
Please click the play button and watch the video before answering.



Jason Mroz
May 29, 2020, 10:09 AM



Wago
May 29, 2020, 10:09 AM



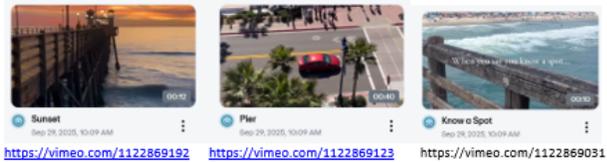
Arinol Kingdom Returns
May 29, 2020, 10:09 AM

<https://vimeo.com/1122869393>

<https://vimeo.com/1122869346>

<https://vimeo.com/1122869250>

Questionnaire



33c1. Have you seen this or similar TikTok or Instagram reels for Oceanside, CA before?
 Yes
 No

Visitors Guide
 I:\Ads Master\Oceanside CA



34. Did you download or order the Visit Oceanside Visitor Guide?
 Yes
 No

35. Have you read any print or online articles about Oceanside, CA on the following topics? Please select all that apply.

- Beaches
- Food / Restaurants/ Michelin Stars
- Culinary Events
- Family vacation travel
- Oceanside Pier / Harbor
- Beachfront luxury and/or boutique hotels
- Surfing / Skateboarding
- Outdoor adventure (skydiving, fishing, whale watching, biking, birding)
- Craft Beer / Cocktails
- Wellness / Spa
- Special tours (e.g., walking food tours, moke tours, sidecar tours, etc)
- Sporting events (Super Girl Pro, Ironman, etc.)
- Historic landmarks and experiences
- Museums (e.g., California Surf Museum, San Luis Rey Mission, Oceanside Museum of Art, etc.)
- Artisan and Vintage Shopping / Street Markets

Arts and Culture experiences / events
 Agritourism (e.g., vineyard tours and wine tastings, pick-you-own-farms, flower fields, etc.)
 Season of Swellness

The following questions are for classification purposes only and will help us understand different groups of people. DO NOT FORCE DEMOS

- D1. Are you currently ...?
 Married
 Divorced/Separated
 Widowed
 Single/Never married
- D2. What year were you born? _____
- D3. including you, how many people are currently living in your household? _____
- D3a. IF D3 IS GREATER THAN 1: How many living in your household are children under the age of 18?
- D4. Which of the following categories best represents the last grade of school you completed?
 High school
 Some college / technical school
 College graduate
 Post graduate courses or degree
- D5. Which of the following categories best represents the total annual income for your household before taxes?
 Less than \$50,000
 \$50,000 but less than \$75,000
 \$75,000 but less than \$100,000
 \$100,000 but less than \$150,000
 More than \$150,000
- D6. Which of the following best describes your race or ethnicity? Are you...?
Select all that apply.
 African-American/Black
 Asian
 American Indian or Alaska Native
 Caucasian/White
 Hispanic/Latino
 Middle Eastern or North African
 Native Hawaiian or Other Pacific Islander
 Other, please specify

D7. What is your preferred gender identity?
 Male
 Female
 Other
 Prefer not to answer

D8. Do you identify as LGBTQIA+?
 Yes
 No
 Prefer not to answer