



Strategic
Marketing &
Research, Inc.

California Tourism
Advertising Effectiveness Research

**Canada Advertising Effectiveness
& Market Assessment**

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BACKGROUND & OBJECTIVES

California has a strong public/private partnership which works to promote and market the state as a preferred travel destination. The California Travel and Tourism Commission (CTTC), a privately funded, non-profit corporation works in concert with the Division of Tourism to implement these marketing efforts. While the CTTC has suffered through ups and downs in terms of funding, a car rental assessment fee was recently implemented that will provide a major increase in budget, and the ability to advertise both nationally and internationally. The first expansion into international consumer advertising targets Canada. During the spring of 2007, advertising was implemented in three Canadian markets – Vancouver, Calgary and Edmonton. This research evaluates the effectiveness of those efforts.

In addition to evaluating reactions to the advertising campaign, this research was also designed to learn more about past travel to California and key motivations that can be used in the development of future marketing efforts.

The key research objectives include the following:

- Assess the effectiveness of the campaign in meeting its communications goals, including consumer awareness, acceptance, preference and actions;
- Determine how well the campaign sparked consumer interest to act and learn more about California as a premier travel destination;
- Evaluate the existing competitive situation to determine key competitors for California trips;
- Assess consumers' reactions to the California ads and explore whether the ads communicate the "California attitude" to consumers;
- Gauge the impact of the advertising on attitudes about California as a travel destination and link differences in attitudes to variations in preference and travel;
- Gather information about past travel to better understand travel motivations and the characteristics of trips to the state;
- Provide insight and recommendations to help guide and refine future marketing campaigns.

As with the research conducted for the national advertising effort, the research in the Canadian markets will focus on determining the level of incremental travel generated by the advertising. This research will be conducted in two waves; the first measures how well the campaign met these objectives. As such, this wave was conducted during and immediately following completion of the advertising flights to provide more timely feedback for planning upcoming advertising efforts. The level of incremental travel will be measured during a final wave of research, after people have had time to visit the state.

The following report summarizes the key findings from Wave 1. In addition, conclusions and recommendations are forwarded to guide future advertising campaign endeavors.

METHODOLOGY

This Advertising Effectiveness research was based on the methodology that has been used in evaluating California's marketing and advertising efforts since 2003. This first wave of interviews employed an on-line methodology to measure awareness within the three target markets. The questionnaire, a copy of which appears in the Appendix, focused on recall of the California ads and preference for the state as a leisure destination. In addition, information was collected on travel to California within the past five years.

Data collection was conducted during June/July 2007 in the markets of Vancouver, Calgary and Edmonton, with a goal of 400 surveys in each market. In this survey respondents were screened to ensure that they had either visited the United States in the past two years or indicated that they were likely to visit in the next two years. They were also qualified to confirm their status as leisure travelers and as travel decision-makers for their households. The survey was also monitored to ensure an adequate sample of visitors as well as a good seasonal distribution and the ability to compare trips taken by air travelers to those of drivers to the state. In the final sample, there were 467 qualified visitors, with 361 being air travelers and 95 being drivers. On a seasonal basis, 113 visited in the winter, 166 in the spring, 99 in the summer and 89 in the fall.

Upon completion of the survey process, the resultant data were compiled, analyzed and weighted to be representative of the sampled populations. The following report summarizes the key findings from this research and forwards conclusions and recommendations for consideration.

THE ADVERTISING CAMPAIGN

Before 2007, California Tourism had not implemented an advertising campaign in Canada; this was a new effort. The campaign used the television ad developed for use in the US and focused advertising in three markets: Vancouver, Calgary and Edmonton.

The advertising ran during spring 2007, and the total cost of the campaign was \$789,000. These expenditures were split -- \$379,000 went to the Vancouver market and \$205,000 went to both Calgary and Edmonton. The campaign promoted the California brand and marketed the state based on consumers' desire to enjoy the coveted California lifestyle.

COMPETITIVE SITUATION

This research effort represents the first time that California Tourism has evaluated the Canadian market. As noted, the advertising in these three markets was a first-time effort. As such, it made sense to explore attitudes and behavior in these markets. This report highlights key findings regarding where Canadians traveled, why they came to California, their reactions to the California Tourism advertising campaign and other information which will aid in refining future marketing efforts.

One way to evaluate the competitive situation is to consider where people chose to travel within the U.S. As noted, the only people included in this study were those who had taken international trips – about 49% of the residents. To evaluate travel, people were asked whether they had visited a number of states – and then how many visits they had made in the past two years. This information can be used to calculate the share of trips that each state attracted during this period.

It is certainly noteworthy that 75% of the respondents indicated visiting California in the past 2 years. This is much higher than any other state. When the average number of trips is considered, California received about one-quarter of the trips. Interestingly, while fewer people reported visiting Washington, when the average number of trips is considered, this state received the largest share of trips. Nevada was the only other state to receive a significant share of trips.

When the level of travel to different states is considered, significant differences are noted between the three cities evaluated. In each case, California received the most visitation. However, among Vancouver residents, Washington was the second most popular destination, while those from Calgary and Edmonton were more likely to visit Nevada than Washington. Florida was more popular among Calgary residents, and those from both Calgary and Edmonton were more likely

State	%	Avg. Trips	% Of Total Trips
California	75%	1.8	25%
Washington	46%	3.5	30%
Nevada	35%	2.0	13%
Florida	25%	1.3	6%
Oregon	24%	1.6	7%
Hawaii	22%	1.2	5%
Arizona	19%	1.7	6%
New York	17%	1.3	4%
Texas	11%	1.8	4%
Colorado	6%	1.3	1%
None	6%		

to visit Colorado and Texas than those from Vancouver. Of course, many of these differences are based on geography and the states that are closer to each market.

States Visited

State	Calgary	Edmonton	Vancouver
California	68%	76%	77%
Washington	23%	22%	64%
Nevada	38%	40%	32%
Florida	36%	20%	22%
Oregon	11%	17%	31%
Hawaii	20%	17%	24%
Arizona	23%	18%	18%
New York	15%	15%	19%
Texas	15%	15%	8%
Colorado	8%	8%	5%
None	8%	11%	3%

When it comes to top of mind awareness, California is also leading the other states. This was an open-ended question that asked consumers to indicate which states came to mind in terms of trips they were considering during 2007. In addition to California, Nevada and Hawaii were popular.

Top of Mind Awareness Visitation

State	%
California	26
Nevada	12
Hawaii	11
Florida	9
Washington	9
Arizona	6
New York	5
Alaska	3
Montana	3

In fact, in terms of preference, Hawaii is actually the most popular state. Over a quarter of the people indicated that if they could choose a single state for their next visit, it would be Hawaii. California was next, followed by Nevada and New York. While people do not necessarily travel to Hawaii, they find it the most appealing.

While consumers prefer Hawaii as a destination, it is not necessarily where they will travel. When trips that are already planned are considered, Nevada is the favorite, followed by Washington and then California. Only 4% of the respondents have a trip to Hawaii already planned.

Preferred Destination

Destination	%
Hawaii	29%
California	13%
Nevada	11%
New York	11%
Florida	10%
Other destination	7%
Washington	6%
Arizona	5%
Texas	4%
Oregon	3%
Colorado	1%

Already Planning a Trip

States	%
Nevada	11.0%
Washington	9.8%
California	9.5%
Florida	6.0%
New York	4.8%
Arizona	4.0%
Hawaii	4.0%
Oregon	3.9%
Texas	2.8%
Colorado	2.2%

However, when respondents indicate where they are *actually* likely to travel in the next year, California is again at the top. This is interesting in that it suggests that California is not the most popular or “ideal” destination, but due to distance, cost and other factors it is the place people from these cities have traveled – and will travel. This scenario suggests that the state needs to strongly craft its image and reinforce consumers’ intentions to visit.

In understanding the image of the various options and to assess the competitive situation, respondents were asked to rate California and several of its competitors relative to twenty-three (23) attributes. Specifically, the state was rated against key competitors as defined by actual travel information from Canada. The states with the most travel were identified as Arizona, Nevada, Florida, and New York. The ratings involved a 5-point scale, where higher ratings denote stronger performance. With this type of scale, a rating of “4” or better is excellent, while a score of 3.5 to 4.0 is considered good.

Net Likelihood to Visit During 2007

States	Likelihood
California	17.1%
Washington	15.3%
Nevada	13.0%
Hawaii	10.6%
Florida	8.2%
Arizona	8.0%
New York	7.9%
Oregon	7.6%
Texas	4.8%
Colorado	2.8%

California has a fairly strong image, with seven ratings in the “excellent” category and many above 3.5. The state is seen as having lots to do including family activities and theme parks, large cities, excellent beaches, scenery and a focus on food & wine. California is not viewed as a place for snowsporting, and generally does not stand out for these Canadian residents as a place that is unique. Canadians are less likely to believe that Californians have a unique approach toward life that is worth seeing.

Attribute Ratings for California

Has a lot of family activities & theme parks	4.2
Is a place with lots to see and do	4.2
Has large cities with exciting urban experiences – nightlife/shopping/dining	4.2
Is fun	4.1
Has excellent beaches	4.0
Is scenic and beautiful	4.0
Is a place where food & wine are part of the culture/lifestyle	4.0
Has a variety of active, outdoor activities - hiking/climbing/biking	3.8
Has picturesque parks	3.7
Is culturally diverse	3.7
Is free spirited and individualistic	3.6
Is casual and laid back	3.5
Has a unique and desirable lifestyle	3.5
Is wacky and youthful	3.5
Has interesting historical sites	3.4
Has friendly people	3.4
Offers the best of everything in one place	3.4
Has many quaint small towns	3.4
Has lakes for boating & fishing	3.3
Is unlike anyplace else	3.2
Residents have unique approach toward life & it is something I want to see & experience on my vacation	3.2
Provides a good value for the money	3.1
Is a good place for snow sporting	2.4

To assess the competitive environment, California was compared to four (4) other destinations which represent the competitive set and primary destinations which consumers are likely to choose over California. The competitors were chosen after a review of data from Canada that detailed travel behavior. Again, each state was rated on twenty-three (23) attributes. The best way to compare the image of California to its competitors is via an index. The index identifies attributes where California is rated more highly than others. With the index, 100 is average, while 120 indicates a rating that is 20% higher than competitors. In several areas, California is viewed differently than the competition:

- Has excellent beaches
- Has a lot of family activities and theme parks
- Is a place where food & wine are part of the culture/lifestyle
- Is wacky and youthful
- Is casual and laid back
- Has a variety of active outdoor activities

California also has a fairly high index for snowsporting – but the competitive set did not include key states that promote winter activities.

Attributes	CA	AZ	FL	NV	NY
Has excellent beaches	140	77	138	66	78
Has a lot of family activities & theme parks	126	87	122	85	80
Is a place where food & wine are part of the culture/lifestyle	116	89	93	95	106
Is wacky and youthful	114	87	100	100	99
Is casual and laid back	114	112	106	93	76
Has a variety of active, outdoor activities - hiking/climbing/biking	114	110	96	96	84
Is a good place for snow sporting	113	100	77	95	115
Is scenic and beautiful	111	105	100	95	89
Is free spirited and individualistic	111	95	96	99	98
Is a place with lots to see and do	110	91	101	93	105
Has picturesque parks	109	105	102	88	94
Is fun	109	90	100	102	99
Offers the best of everything in one place	109	95	105	91	101
Has large cities with exciting urban experiences - nightlife, shopping & dining	109	85	100	95	111
Has a unique and desirable lifestyle	109	102	102	89	98
Is culturally diverse	109	92	103	82	115
Has many quaint small towns	108	109	101	93	90
Has lakes for boating & fishing	107	101	111	91	90
Residents have unique approach toward life & it is something I want to see & experience on my vacation	105	101	99	94	101
Has friendly people	104	105	102	101	88
Has interesting historical sites	102	105	99	86	107
Provides a good value for the money	102	108	100	106	84
Is unlike anyplace else	93	96	96	108	107

These findings indicate that California faces an interesting competitive situation. Generally, it is more popular than its key competitors – even though it is not necessarily the preferred destination. For the western part of Canada, Washington is an easy destination and attracts much of the visitation; Nevada is also popular. However, California offers more in the way of beaches, theme parks and scenery. Within the western market, the positioning based on food and wine certainly provides a point of differentiation. Of note, Florida is also a strong competitor with a sound image for beaches and theme parks. This suggests that the competitive situation in central Canada may be more difficult. As California Tourism enters the Ontario market, this issue will be especially important.

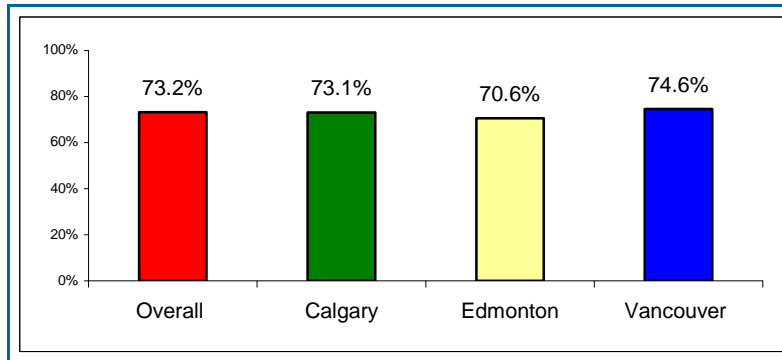
ADVERTISING AWARENESS

Within this competitive situation, California Tourism wants to generate additional visitation from these three Canadian markets. This can be new visitors to the state or past visitors coming more often. The first step toward influencing this audience to visit California is to reach them with advertising. To determine whether people saw the advertising, this research process let people view the ads and indicate whether they recalled seeing them.

The advertising in these markets focused on television and utilized the same ad that was used in the US. As noted earlier, this research was focused on Canadian residents who had taken a trip to the United States in the past two years, or were likely to take such a trip in the next two years. This ended up being 49% of the population in the three cities evaluated.

Within this target audience, the level of advertising recall was extremely high, reaching 72.3% overall. There were only slight variations by market, with Vancouver reporting the highest level of recall and Edmonton the lowest.

Recall Advertising



By considering the household population of each city and the level of US travel, the target audience can be calculated. Overall there are approximately 2 million households in the three markets that are past or likely US visitors. Among this group, the California advertising was able to reach 1.5 million households. Due to the size of the market and slightly higher advertising awareness, over half of the aware households are in the Vancouver market.

	International Travelers	Recall	Aware HHs
Calgary	528,862	73.1%	386,598
Edmonton	507,123	70.6%	357,826
Vancouver	1,037,125	74.6%	773,384
Total	2,073,110	73.2%	1,517,516

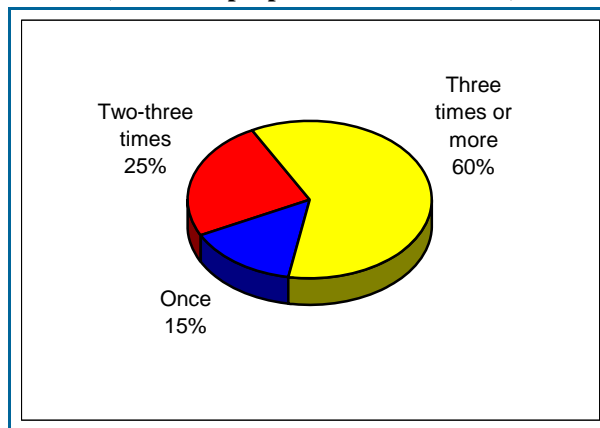
Another context for comparison can be associated to the cost to reach an aware household. The campaign expenditures in Canada were \$789,000 which translates to \$0.52 to reach each household. Again, there are slight variations by market, with Vancouver being the most cost efficient market and Edmonton the least.

	Aware HHs	Media Costs	Cost/Aware Household
Calgary	386,598	\$205,000	\$0.53
Edmonton	357,826	\$205,000	\$0.57
Vancouver	773,384	\$379,000	\$0.49
Total	1,517,516	\$789,000	\$0.52

These numbers can be compared to the US campaign also, to provide additional context. During 2006 the overall cost to reach a household in the US was \$0.12, but the cost for targeted households was \$0.58. Therefore, the cost in the Canadian markets was quite comparable to that achieved among the targeted US audience. SMARI has measured ad awareness and calculated the cost to reach an aware household for a large number of destinations and campaigns, and has established a national average of \$0.90. Therefore, the California campaign in Canada performed extremely well.

The campaign also performed quite well in terms of the frequency of recall. Not only did over 70% of the respondents recall the campaign – but they indicated that most had seen it more than three times. This indicates that the advertising had both broad reach, and the depth to influence attitudes and, potentially behavior.

Frequency of Recall
 (# of times people saw California ad)



CREATIVE EVALUATION

Given that these Canadian cities are new target markets, the importance of the creative message is heightened. The *right* message will position California as the preferred travel destination and the place that consumers will want to visit during their next vacation. Most importantly, with the competitive situation, the advertising has to spur people toward a desire to visit the state. To explore this issue, this research effort also explores the message that consumers receive when they view the travel ads.

The research asked respondents to view the television ad, which was the key effort in these markets. They rated the advertising in four categories, using a 5-point scale, where the higher the number, the more they agreed with the statement:

- After seeing this ad I am more interested in visiting the state
- Shows experiences and places that you are interested in
- Shows a place with a unique attitude toward life
- Portrays a place that offers vacationers the best of everything there is – in one place

With this scale, a higher rating denotes stronger performance. SMARI has tested a large number of travel ads and generally the best ads receive ratings of 3.8 or higher. A score of 4.0 is very unusual although past California advertising has achieved this level, and most successful ads earn ratings from 3.5 to 3.8.

Within this context, the ratings for the advertising used in these markets are quite strong, and ratings in all areas are within or above the 3.5 to 3.8 range. The ad is especially successful at showing people that California offers the best of everything all in one place. It shows experiences and places that are of interest as well as the unique attitude toward life. As a result, this ad does generate interest in visitation. While this is the lowest rating, this is often the case – as it is more difficult to generate an urge toward action.

After seeing this ad I am more interested in visiting this state	3.6
This ad shows experiences and places that I am interested in	3.9
This ad shows a place with a unique attitude toward life	3.8
This ad portrays a place that offers vacationers the best of everything there is – in one place	4.0

Generally reactions to the ad were similar across the three markets, although there were slight variations. Respondents in Vancouver were more positive, while those in Edmonton were a bit less positive. This will be explored in light of visitation patterns, and may relate to the trip preferences of residents in various cities.

	Calgary	Edmonton	Vancouver
After seeing this ad I am more interested in visiting this state	100	99	101
This ad shows experiences and places that I am interested in	100	96	102
This ad shows a place with a unique attitude toward life	99	99	101
This ad portrays a place that offers vacationers the best of everything there is - in one place	100	98	101

There are no significant differences in reactions to the ad based on past visitation, but there are differences based on likelihood to visit. Those who are very likely to visit are the most positive about the ad – which suggests that the creative is reinforcing peoples’ existing image of the state. Those who believe that California offers the best of everything want to visit the state.

Ratings based on Likelihood to Visit

California	Not at all likely	Very likely
After seeing this ad I am more interested in visiting this state	3.4	3.8
This ad shows experiences and places that I am interested in	3.7	4.1
This ad shows a place with a unique attitude toward life	3.7	4.0
This ad portrays a place that offers vacationers the best of everything there is - in one place	3.9	4.3

In part, reactions to the advertising seem to relate to vacation preferences. The people who are less positive about the ad don’t prefer the same destinations as those who are more positive. The less positive audience is more likely to prefer Texas, Colorado and Oregon – while the most positive prefer California, Nevada and Washington.

INFLUENCE ON ATTITUDES

Another way that the advertising can generate positive impact is by improving the image that consumers have of California and its appeal as a leisure destination. Especially in international markets, the actual travel may not occur immediately after the advertising, but if the ads are effective, as people see them multiple times, they will absorb specific messages about California. Over time, these messages will create more interest in visiting the state – and ultimately more travel. To measure this impact on consumers’ attitudes about California, consumers are asked to rate the state early in the survey – before they are shown any ads. While all the respondents are then shown the ads, differences in the ratings between those who claimed to have seen the ads when they ran and those who saw them only as part of the survey can be attributed to the impact of the campaign.

The following table shows the rating differences between consumers who recalled seeing the ads during the campaign and those who did not. As the overall ratings indicate, consumers already have a positive view of California, meaning that it may be difficult to influence their attitudes. In fact, generally, the ratings among both those who saw ads and those who did not are not statistically different. The advertising did help create a stronger image relating to California as culturally diverse.

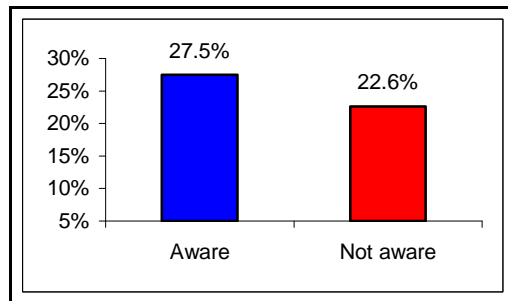
Attributes	Ad Aware	Non-Aware	Difference
Is culturally diverse	3.75	3.49	0.26
Is casual and laid back	3.52	3.30	0.22
Has interesting historical sites	3.43	3.28	0.15
Residents have a unique approach toward life & it is something I want to see & experience on my vacation	3.22	3.08	0.14
Is scenic and beautiful	4.05	3.92	0.13
Is free spirited and individualistic	3.67	3.55	0.12
Has lakes for boating & fishing	3.32	3.21	0.11
Is a place with lots to see and do	4.22	4.12	0.09
Is a place where food & wine are part of the culture/lifestyle	4.00	3.91	0.09
Is a good place for snow sporting	2.42	2.36	0.06
Has a unique and desirable lifestyle	3.47	3.41	0.06
Has excellent beaches	4.04	3.99	0.06
Has picturesque parks	3.73	3.70	0.03
Provides a good value for the money	3.12	3.11	0.01
Is wacky and youthful	3.45	3.47	-0.02
Has a lot of family activities & theme parks	4.20	4.21	-0.02
Offers the best of everything in one place	3.38	3.40	-0.02
Has many quaint small towns	3.34	3.37	-0.04
Has a variety of active, outdoor activities - hiking/climbing/biking	3.77	3.81	-0.04
Has large cities with exciting urban experiences - nightlife, shopping & dining	4.14	4.20	-0.06
Is fun	4.06	4.16	-0.10
Has friendly people	3.37	3.48	-0.11
Is unlike anyplace else	3.19	3.32	-0.13

BUILD INTEREST & PREFERENCE

The final measure of effectiveness evaluated in this Wave is whether the advertising increased consumers' interest in visiting the state. As with the US measures, several measures were used to determine the impact of the advertising in changing consumers' attitudes. The most important measure - the actual level of travel will be measured in the Wave 2 of the advertising. This wave explored how preference for California as a travel destination changed, how likelihood to travel was impacted and how the advertising prompted people to take action such as gathering more information.

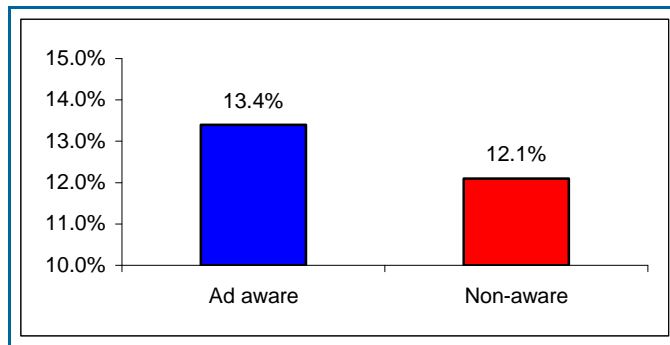
One way to attract more visitors is to create a stronger top-of-mind awareness of California as a travel destination. If more people immediately think of California when they begin to select a travel destination, they will be more likely to visit. The advertising seems to be working; those who are aware of the advertising are more likely to mention California as the first destination that comes to mind.

**Top-of-mind California Mentions
by Advertising Awareness**



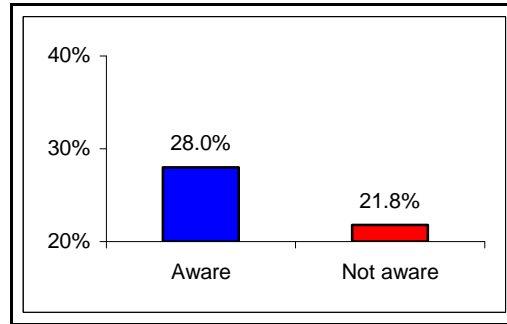
As noted in the competitive analysis, while California has strong top of mind awareness, it is not the preferred destination. Hawaii has a much stronger preference, when Canadians in these markets are asked to choose a single state. The advertising has a small impact in raising the level of preference, but even among those with advertising awareness, Hawaii remains the most popular destination.

Preference for California by Ad Awareness



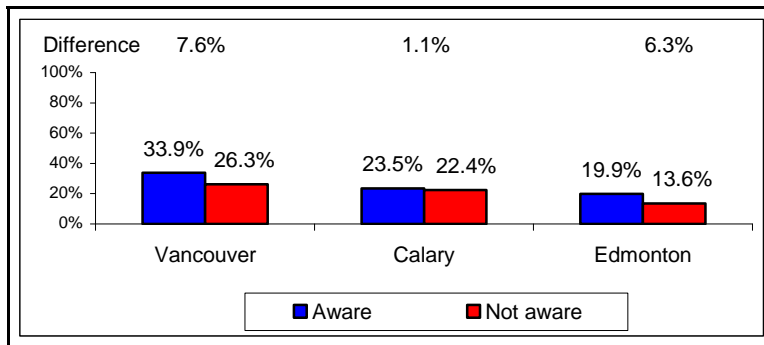
In addition to discovering whether California had top-of-mind awareness, the research explored the likelihood of people to visit California in the next year. Among those with advertising awareness, a higher percentage say that they are already planning a trip or are very likely to visit in the next year.

**Likelihood to Visit California
By Awareness of California Campaign**



The research also explored impact within each of the three Canadian markets. The impact was greatest in Vancouver; people in that market were most likely to visit. The impact was almost as great in Edmonton, although this market predicts weaker visitation. The weakest impact was on the Calgary market.

Impact on Interest - by Markets



Finally, while the ultimate goal is to generate visitation, some interim actions are worth noting. If the advertising generated interest in visiting the state, it is likely that people took action to find out more about California. Therefore, the survey explored the percentage of people that gathered information, visited a California Website or called an 800 number for additional information. The advertising had strong impact in terms of consumers gathering information, although not necessarily information from California Tourism. More people who saw the ads did visit the Website, but fewer called the 800 number. Still, the findings suggest that the advertising did generate interest in California.

Impact of Advertising

Gathered Information	Saw Ads	Index Compared to Non-aware
Gathered Information about a trip	30.4%	123
Visited Website	17.9%	105
Called state 800#	1.5%	80
Gathered info in some other way	44.2%	114

To better understand the impact of the advertising, we can translate this information into the number of ad-aware people that took specific action. Of course, these are self-reported actions, and people may not accurately recall what they did. But these findings suggest that among those who saw the advertising:

	Gathered Info	Visited State Website	Called 800#
Ad Aware Hhlds	1,517,516	1,517,516	1,517,516
% Who Saw Ads	30.4%	17.9%	1.50
Took Action	461,325	271,635	22,763

- Over 450,000 gathered information about California
- Over 270,000 visited the state website
- Over 20,000 called the California 800 number

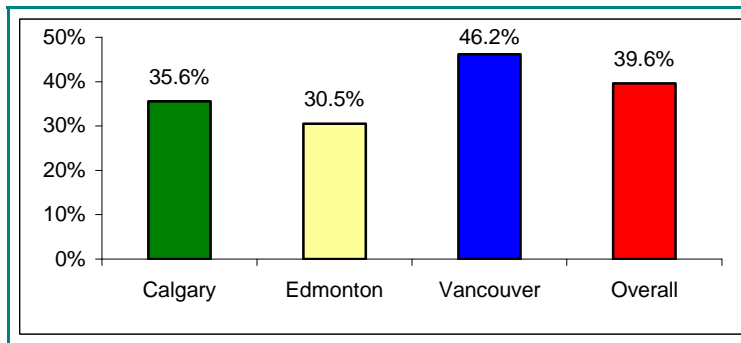
In addition to considering the impact of the advertising, this research was designed to explore past travel to California. By understanding the existing travel landscape, California Tourism can identify the best ways to attract additional visitors. The following provides details about California trips.

CALIFORNIA TRAVEL

While traditionally this wave of research focuses on advertising awareness and the impact of the creative, because California Tourism was entering Canadian markets for the first time, the scope of the study was expanded. In addition to measures related to advertising, information was gathered about past travel to the state. The goal was to better understand travelers from Canada and identify strategies for future marketing efforts.

One of the first interesting findings is the level of past travel to California. Overall, 53% of the respondents indicated having visited California in the past five years, with 39.6% reporting a trip in the past two years. Respondents from Vancouver reported the highest visitation, with Edmonton reporting the lowest.

Visitation to California – Past 2 Years



There is some seasonality to visitation from Canada, with spring being the most popular season, attracting slightly over a third of the visitation. Visitation was similar throughout the other three seasons.

The average trip was about a week long, with 13% being two days or less. About 63% were between 2 and 7 days, and 24% were over a week long.

	Nights spent in CA during this trip
Calgary	6.7
Edmonton	7.6
Vancouver	6.3
Total	6.6

	Overall
December	7.2%
January	6.6%
February	9.1%
Winter	23.0%
March	10.5%
April	10.3%
May	15.7%
Spring	36.5%
June	7.4%
July	8.1%
August	5.9%
Summer	21.4%
September	7.6%
October	7.2%
November	4.5%
Fall	19.2%

Los Angeles is the most popular destination, followed by San Francisco, Anaheim/Orange County and San Diego. Due to the length of the trips, visitors often go to more than one city in California, with 24% visiting two cities, and 19% visiting three or more areas of the state.

Cities Visited	Overall
Los Angeles	44%
San Francisco	35%
Anaheim/Orange County	30%
San Diego	30%
Palm Springs	12%
Monterey	7%
Sacramento	7%
Lake Tahoe	3%
Other	3%
Southern California (other destinations)	2%
Northern California (other destinations)	2%
Napa	2%

The research explored the reasons for visitation to California, to provide greater insight into how California can attract Canadians. Respondents were asked to rate the importance of several reasons for visiting, using a 5-point scale, where the higher the score, the more important the reason as a motivation. Two reasons were equally important – *seeing something new and different* and *going somewhere with better weather*.

	Rating
Seeing something new and different	4.0
Going somewhere with better weather	4.0
Returning to somewhere familiar that you enjoy	3.5
Visiting a specific attraction or event	3.5
Visiting friends and relatives	3.1

As part of their visit, respondents reported participating in an average of 3.3 activities. Shopping was the most popular activity, followed by fine dining and enjoying natural scenery. Yet, it is also important to make a distinction between activities that people do on a trip and those that motivate their trips. To assess motivations, respondents were asked to indicate which of the activities spurred them to choose California.

The table below shows the key factors that influenced the largest number of trips. This is calculated by considering the percentage of people that participated in an activity multiplied by the percentage that indicated this activity prompted their trip. The “net” number represents the percentage of trips that were influenced. From this standpoint, visiting a theme park was the most important activity in generating travel, followed by shopping, viewing natural scenery and fine dining.

Key Factors that Influenced Trips

Activities	Did	Impacted	Net
Visiting a theme or amusement park	40%	65%	26%
Shopping	73%	31%	23%
Viewing & enjoying natural scenery, e.g., mountains, oceans, etc.	55%	38%	21%
Fine dining or eating at a unique local restaurant	63%	28%	18%
Going to the beach	39%	42%	16%
Visiting a winery	22%	50%	11%
Go sightseeing or take tours	32%	31%	10%
Driving on scenic byways or roads	38%	24%	9%
Entertainment and nightlife	34%	23%	8%
Experiencing the unique culture of the area	26%	25%	6%
Golf	8%	76%	6%
Arts activities, e.g., museums, theater performances	25%	24%	6%
Visiting a national or state park	25%	21%	5%
Visiting small towns and rural areas	28%	16%	4%
Visit historical sites	24%	19%	4%
Visiting activities that are fun for small children	12%	35%	4%
Watching sporting events	10%	36%	4%
Gambling	11%	27%	3%
Hiking or camping	10%	27%	3%
Boating or other water activities	6%	11%	1%
Visiting a spa	7%	9%	1%
Adventure activities, e.g., whitewater rafting, rock climbing, skiing	2%	12%	0%

While it is helpful to identify the key motivators, it is also helpful to understand which activities group together on trips. Factor analysis was used to identify seven groups of activities. In putting together advertising and marketing efforts, including features on the Website, these are the groups of activities that people are likely to enjoy on a trip. These groups were used to characterize trips and determine the percentage of trips that each group represents. In addition to these groups, 7.8% of the trips were motivated by visiting friends and relatives and another 11% were not motivated by an activity.

Overall, the largest group of trips - 30.9% - related to attending theme parks. As noted, this activity motivated the largest number of trips. In addition to theme parks, the other activities that were often included in these types of trip were:

- Activities that are good for small children
- Going to the beach

Predictably, these trips were concentrated in southern California, including Los Angeles, Anaheim and San Diego.

The second most prominent trip type focused on a combination of dining and shopping, and represented a total of 16.3% of the trips. The activities on this trip included:

- Shopping
- Fine dining, eating at unique local restaurants
- Entertainment and nightlife
- Visiting a spa

These trips included a number of destinations including Los Angeles, San Francisco, San Diego and Palm Springs.

Trips related to scenery represented 12.3% of the total trips and focused on exploring the more beautiful and rural areas of the state. Key activities included:

- Driving on scenic byways
- Viewing and enjoying natural scenery
- Visiting a national or state park
- Visiting small towns and rural areas

Several destinations attracted this type of trip, including San Francisco, Monterey and Lake Tahoe as well as smaller towns in Northern California.

Another 10.3% of the trips revolved around cultural activities and sightseeing. There were four major activities:

- Sightseeing and taking tours
- Arts activities and culture
- Visiting historical sites
- Experiencing the local culture

These trips were strongly linked to visiting San Francisco - with 69% saying that this is where they visited for this type of trip.

Only about 5.3% of the trips related to sports or more adult activities. These activities included:

- Golf
- Watching sporting events
- Gambling

These trips were not concentrated in the major cities – at least not at the same level as other trips. While the largest number of trips was made to Los Angeles, Palm Springs was almost as popular and Lake Tahoe was also a key destination.

While 22% of the people indicated that they visited a winery during their trip, and 11% named this a motivator, many of these people were also motivated by other factors. Four-percent of trips were motivated specifically by visiting a winery. When this activity was the major motivator, it tended to be the major activity. Almost all these trips were made to the San Francisco area and then included surrounding areas.

Finally, a mere 2% of the trips were motivated by more adventuresome, outdoor activities including:

- Adventure activities, e.g., whitewater rafting, rock climbing or skiing
- Hiking or camping
- Boating or other water activities

These trips also seemed to be concentrated in the San Francisco area, although some occurred in the Los Angeles and Anaheim areas.

SEASONAL DIFFERENCES

There were some seasonal differences relating to trips to California, and this information can be used to craft the appropriate messages at different times of the year.

Winter Trips

- Interestingly, there were twin, equally important motivators for winter trips – going somewhere for better weather and seeing something new / different.
- Winter trips were the longest, at 7 nights.
- While these were the longest trips, they involved the fewest cities and activities.
- People from Calgary were more likely to visit California in the winter, compared to the other two markets. Those from Vancouver were least likely to visit during this season.
- The percentage of people that drove to California was lowest during this season, under 20%.
- Los Angeles was the most frequently visited destination, followed by Anaheim and San Diego. A higher percentage of trips was made to Palm Springs.
- The key types of trips for this season were theme park trips and trips focused on shopping and dining. In addition, a higher percentage of Culture trips were made during this season. At the same time, more trips were not motivated by activities.

Winter Activities	Winter	Index
Theme park	31.5%	102
Shop & dine	16.4%	101
No activity	13.7%	122
Culture	11.1%	108
Scenery	9.5%	77
Visiting friends & relatives	5.5%	71
Sport	4.7%	89
Active outdoor	4.1%	209
Winery	3.4%	89

Spring Trips

- Spring generated the most travel from these Canadian markets, with over one-third of the trips occurring during this season.
- For spring trips, the most important motivator was finding better weather.
- Trips averaged 6.5 nights and included an average of 6.1 activities.
- As with winter trips, few people drove to California during this season (under 20%).
- The most frequent destinations were Los Angeles and San Diego; San Francisco was also popular.
- Vancouver residents were the most likely to visit in the spring, while those from Calgary were least likely to visit during this season.
- While the largest group of trips related to theme parks, the percentage was below the overall average. Trips related to shopping & dining and culture were prevalent. Trips to wineries were more prevalent in the spring.

Spring Activities	Spring	Index
Theme park	29.7%	96
Shop & dine	19.3%	118
Culture	14.1%	138
Scenery	11.0%	89
Visiting friends & relatives	10.5%	135
Winery	4.9%	128
Sports	4.8%	90
No activity	3.5%	31
Active outdoor	2.2%	110

Summer Trips

- Summer trips were different in several ways. First, the key motivation was seeing something new and different.
- These trips averaged 6.9 nights and included the most cities – 2.2 on average, with 6.5 activities.
- These travelers were the most likely to drive to California, with one-third of the trips choosing this option.
- These visitors were younger and more likely to have children under the age of 18.
- Residents from Edmonton were the most likely to visit during the summer; those from Calgary were the least likely to do so.
- Los Angeles, San Francisco and Anaheim were the most popular destinations, although this is the season when Canadians were the most likely to visit Monterey and Sacramento.
- While theme park trips were most popular during every season, the prevalence was strongest in the summer. During this season, the focus was much more on scenery and visiting friends and relatives.

	Summer	Index
Theme park	39.4%	127
Scenery	16.7%	135
Visiting friends & relatives	12.3%	158
Shop & dine	12.2%	75
No activity	9.3%	83
Culture	5.0%	49
Sports	3.6%	68
Winery	1.5%	38
Active outdoor	0.0%	0

Fall Trips

- The most important reason for traveling during this season was seeing something new and different, but some were also looking for better weather.
- Trips during the fall were the shortest, at 5.9 nights. The trips included an average of 1.6 cities and 5.8 activities.
- Most of these trips involved flying to California (75%). The percentage of driving trips was higher than in the winter and spring.
- People from Calgary were the most likely to visit California in the fall, while those from Edmonton were the least likely to do so.
- The most popular fall destination was San Francisco, followed by Los Angeles, Anaheim and San Diego.
- While theme park trips remained the most prevalent, they were not as popular during this season. Trips related to shopping, dining and scenery were quite popular. Trips to wineries were popular in the fall.

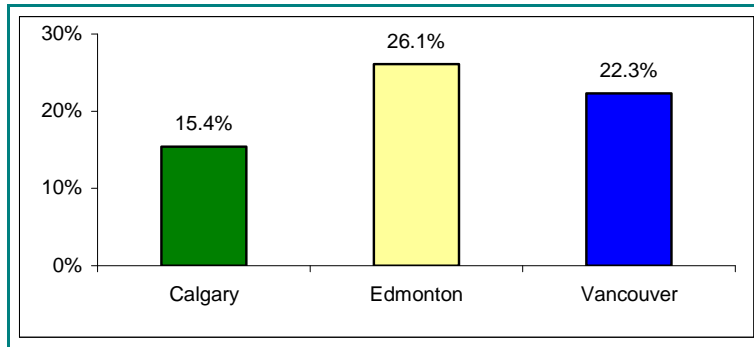
	Fall	Index
Theme park	28.3%	92
Shop & dine	18.0%	110
Scenery	15.3%	124
Culture	9.9%	96
Sports	9.9%	185
No activity	9.8%	87
Winery	5.7%	149
Active outdoor	1.7%	83
Visiting friends & relatives	1.6%	20

FLY VERSUS DRIVE TRIPS

While most Canadian residents chose to fly to California, a significant number, 21%, drove to the state. These trips were different; a review of these differences can again help California Tourism develop its marketing efforts.

People from Edmonton were the most likely to drive to California, while those from Calgary were the least likely to do so. Interestingly, people from Edmonton, the furthest market from California, were the *most likely* to drive. Perhaps this relates to available flights and costs.

Percentage of Driving Trips by Market



Driving trips were significantly longer, with visitors reporting spending an average of 8.7 nights in the state versus 6.2 among those who traveled by air. In addition, these visitors reported staying overnight in an average of 2.4 other states as part of their trip. Obviously, some of these states were merely passed through on the way to California – e.g., Oregon and Washington. Still, the research suggests that other, nearby states were also visited, e.g., Nevada and Arizona.

States Visited during Trip

States Visited on Trip	%
Oregon	57%
Washington	52%
Nevada	43%
Arizona	26%
Idaho	19%
Montana	18%
New Mexico	7%
Other	7%
Colorado	4%
Wyoming	1%

The trips that involved driving varied somewhat from the others – with San Francisco being much more popular among drivers. In addition, those who drove were more likely to visit San Diego, Sacramento, Monterey, Lake Tahoe and other areas throughout the state.

**Cities Visited during Trip
Drove / Flew**

Cities Visited	Flew	Drove
San Francisco	32%	46%
Los Angeles	44%	44%
San Diego	29%	35%
Anaheim/Orange County	31%	30%
Sacramento	4%	19%
Monterey	6%	14%
Palm Springs	12%	12%
Lake Tahoe	2%	10%
Northern California	1%	6%
Other	1%	5%
Southern California	2%	4%
Napa	2%	1%

The types of trips taken were also quite different. While theme park trips were the most popular, those who drove were focusing much more on scenery and culture – and much less on shopping and dining.

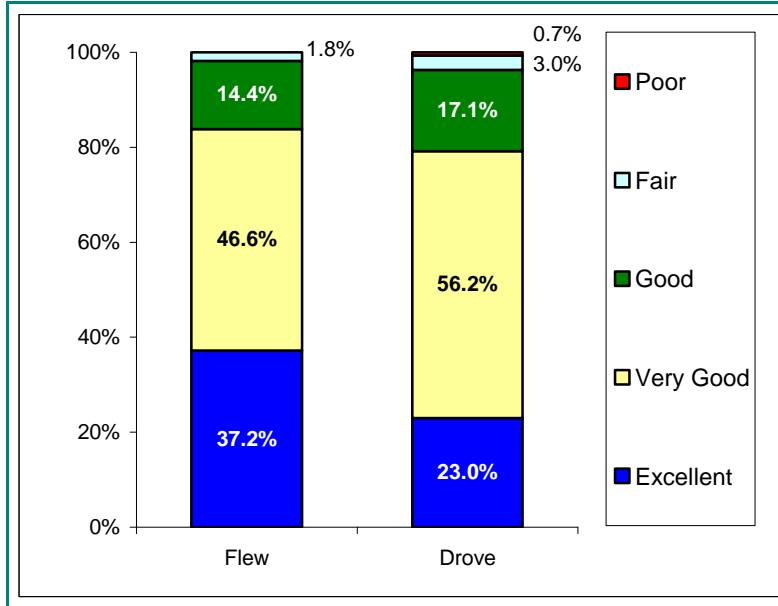
**Activities during Trip
Drove / Flew**

Activities	Flew	Drove
Theme park	32.8	31.9
Scenery	9.2	27.5
Culture	8.6	13.1
Sports	4.9	8.3
Winery	3.7	5.4
Visiting friends & relatives	8.6	5.4
Shopping & dining	20.5	3.7
Active outdoor	1.8	3.0
No activity	9.8	1.6

Demographic differences are also noted between those who drove and those who traveled by air. Those who drove were older, more likely to be married, and less likely to have children living at home. They were also less likely to have a post-graduate degree. About twice the people (14% vs. 7%) were over the age of 65, suggesting an audience of retirees.

Those who traveled by air rated their trip satisfaction a bit higher.

Trip Satisfaction



CONCLUSIONS

This was the first measure of visitation to California among Canadian targets. As such, the research was designed to provide initial measures of campaign effectiveness as well as information about travel which could assist in developing marketing efforts. The following summarizes the key conclusions and recommendations from the research.

- California has a strong competitive position in the western Canadian markets. It received the highest percentage of visitors and the highest top of mind awareness.
- The state did not receive as much repeat visitation as Washington -- therefore it received a slightly lower share of trips.
- California's image is that of a place with lots of theme parks, urban excitement, beaches and beautiful, fun scenery. The state is known as a place where food and wine are part of the culture. The state's imagery is weak relative to being a good place for skiing, probably due to options available in Canada.
- Still, while California is a strong competitor, Hawaii is the "preferred" destination. Yet, while these Canadians say they prefer Hawaii, its share of visitation is much smaller. Hawaii is viewed as a unique place and the most appealing, but it seems to be considered an "ideal" destination rather than a *realistic* one.
- Among the three markets tested, Vancouver is the most positive about the state and the most likely to visit.
- The campaign quite successfully reached a large audience -- 73% of the target audience recalled the ad, translating to 1.5 million households. This was, in part, due to the investment made in these markets -- as evidenced by the cost to generate an aware household. The cost was higher than in the domestic markets; although lower than the national averages.
- The creative campaign was strong and resonated with the audience. As such, the campaign generated stronger top-of-mind awareness, spurred people to gather information about a trip to the state and increased their likelihood to visit.
- Relative to previous visitation, spring was the most popular season and fall the least favored. About 80% of visitors traveled by air and trips were about one week long.
- Los Angeles was the most popular destination, while San Diego and Anaheim also attracted many trips, most of which were made to Southern California. San Francisco attracted travel and those who drove were more likely to visit that city.
- When motivations are considered, Canadians indicated choosing California to see something new and different and for better weather. The activities most likely to motivate visitation included the following:
 - A theme or amusement park
 - Shopping
 - Scenery
 - Dining in unique restaurants
 - Going to the beach
- The trips made by drivers and air travelers varied significantly. During driving trips, scenery and culture were much more important and likely motivated the visit.

RECOMMENDATIONS

- The reach of the campaign was quite strong; respondents recalled seeing the ad frequently. Given that the cost to generate an aware household was higher than in the domestic markets and the strength of reach, it might make sense to consider spending less in these markets.
- The creative was persuasive; continuing this message and theme is an effective strategy. The campaign should focus on increasing the likelihood to visit, rather than positioning California as the “preferred” location. Given that Hawaii has an idealized position it will be difficult to influence preference, which is not necessary to generating travel.
- The research identified several specific trip types which relate to groups of activities. This information should be shared with partners and used to promote specific areas, create packages and conduct seasonal advertising.
- California’s theme parks are crucial to attracting Canadians. A focus on these attractions should be continued.
- While Canadians visit California for better weather, they are just as strongly motivated to see things that are new and different. Here, California has an opportunity to promote repeat visitation by featuring the myriad things which are unique to the state.
- Vancouver currently offers the greatest potential both in terms of its expressed interest in California and its population.

APPENDIX

ADVERTISING EFFECTIVENESS SURVEY - CANADA

California Tourism

June 12, 2007

Thank you for visiting our travel survey. Your opinions are valuable to us! This survey is about travel and vacation choices. This is for research purposes only and is an opportunity for you to give feedback to travel destinations so that they can improve. No sales effort will ever result from your participation.

Before you begin, there are a few things to note about the survey:

- For most questions, simply click on the button of your response and then click on the Next button to go on to the next question.
- If you need to go back to the preceding question to change your response, click on the Previous button.
- For some questions, you will need to scroll down to respond to all the questions on a screen.
- To stop at any point, close the browser window. The survey will terminate and you will not be able to re-enter.

S1. First, who in your household is primarily responsible for making decisions concerning travel destinations?

- 1 SELF
- 2 SELF & OTHER
- 3 SPOUSE/OTHER → TERMINATE

S2. Do you normally take at least one vacation or leisure trip a year? A leisure trip would be any non-business trip involving at least one night stay at a location at least 80 kilometers / 50 miles from your home.

- 1 Yes
- 2 No → TERMINATE

1. Have you taken any leisure trips to the USA in the past 2 years?

- 1 Yes
- 2 No

2. How likely are you to take a leisure trip to the USA in the next 2 years?

- 1 Very likely
- 2 Somewhat likely
- 3 Not very likely
- 4 Not at all likely

TERMINATE IF Q1 IS 2 & Q2 IS 4

3.

	Please check the states that you have visited for a leisure trip in the past 2 years.	How many trips have you taken to the state in the past 2 years?
Texas	<input type="checkbox"/>	<input type="checkbox"/>
Florida	<input type="checkbox"/>	<input type="checkbox"/>
Nevada	<input type="checkbox"/>	<input type="checkbox"/>
California	<input type="checkbox"/>	<input type="checkbox"/>
Arizona	<input type="checkbox"/>	<input type="checkbox"/>
New York	<input type="checkbox"/>	<input type="checkbox"/>
Hawaii	<input type="checkbox"/>	<input type="checkbox"/>
Colorado	<input type="checkbox"/>	<input type="checkbox"/>
Oregon	<input type="checkbox"/>	<input type="checkbox"/>
Washington	<input type="checkbox"/>	<input type="checkbox"/>

4. Thinking about leisure trips you are considering for 2007, what STATES come to mind as places you are thinking about visiting? (USE DROP DOWN LISTS)

STATE #1 _____
 STATE #2 _____
 STATE #3 _____
 STATE #4 _____

5. In the course of planning for any upcoming trips, have you gathered information, gone to the website, or contacted any of the following states regarding information for planning a trip?

Please mark all that apply.

	Gathered information, researched destination	Visited State Website	Called State 800 number	Requested information using other method	None
Texas	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Florida	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nevada	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
California	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Arizona	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New York	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hawaii	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Colorado	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Oregon	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Washington	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

6. How likely are you to visit each of the following states during 2007?

	Not at all Likely	Not Very Likely	Somewhat Likely	Very Likely	Already planning a trip
Texas	1	2	3	4	5
Florida	1	2	3	4	5
Nevada	1	2	3	4	5
California	1	2	3	4	5
Arizona	1	2	3	4	5
New York	1	2	3	4	5
Hawaii	1	2	3	4	5
Colorado	1	2	3	4	5
Oregon	1	2	3	4	5
Washington	1	2	3	4	5

7. Which of the following states would you prefer to visit next? (Please select only one.)

	Prefer
Texas	1
Florida	1
Nevada	1
California	1
Arizona	1
New York	1
Hawaii	1
Colorado	1
Oregon	1
Washington	1
Other destination	1

8. How likely are you to visit each of the following cities in the next two years?

	Not at all Likely	Not Very Likely	Somewhat Likely	Very Likely	Already planning a trip
San Francisco	1	2	3	4	5
Los Angeles	1	2	3	4	5
San Diego	1	2	3	4	5
Portland	1	2	3	4	5
Seattle	1	2	3	4	5
Phoenix	1	2	3	4	5
Las Vegas	1	2	3	4	5

CALIFORNIA SHOULD BE ASKED OF ALL;
AS WELL, ROTATE ONE ADDITIONAL STATES: ONE OF THE FOLLOWING:

FLORIDA
NEVADA
NEW YORK
ARIZONA

9. Please answer some questions regarding [INSERT STATE]. For each statement, rate how much you agree or disagree that the statement describes [INSERT STATE]. How strongly do you agree or disagree that [INSERT STATE]:

	Strongly Disagree				Strongly Agree
Is a place with lots to see and do	1	2	3	4	5
Is culturally diverse	1	2	3	4	5
Is scenic and beautiful	1	2	3	4	5
Is fun	1	2	3	4	5
Has a variety of active outdoor – hiking/climbing/biking	1	2	3	4	5
Has large cities with exciting urban experiences – nightlife, shopping & dining	1	2	3	4	5
Has many quaint small towns	1	2	3	4	5
Has excellent beaches	1	2	3	4	5
Has picturesque parks	1	2	3	4	5
Is free spirited and individualistic	1	2	3	4	5
Has interesting historical sites	1	2	3	4	5
Is a place where food & wine are part of the culture/lifestyle	1	2	3	4	5
Has a lot of family activities & theme parks	1	2	3	4	5
Has lakes for boating & fishing	1	2	3	4	5
Is wacky and youthful	1	2	3	4	5
Is casual and laid back	1	2	3	4	5
Offers the best of everything in one place	1	2	3	4	5
Is unlike anyplace else	1	2	3	4	5
Has a unique and desirable lifestyle	1	2	3	4	5
Has friendly people	1	2	3	4	5
Provides a good value for the money	1	2	3	4	5
Is a good place for snowsporting	1	2	3	4	5
Residents have a unique approach toward life & it is something I want to see & experience on my vacation	1	2	3	4	5

INTRO TO AD: JUST SHOW CALIFORNIA

Next you will be shown a travel advertisement. Please take a moment to view the ad and answer the questions. The ad will involve streaming video. You must have Microsoft Media Player installed to watch the ad.

If you have broadband Internet access, such as a cable modem, DSL, or a fast connection at work, please click the Broadband buttons to view the ads. If you have a dialup modem or you're not sure, use the Dialup buttons.

Please click Dialup or Broadband to view the ad then answer the questions.

California

mms://sms7.omniproductions.net/CA07_CATV1-1.wmv

mms://sms7.omniproductions.net/CA07_CATV1-1a.wmv

10. Do you recall seeing the ad?

1. Yes
2. No (THANK AND SKIP TO INSTRUCTION BEFORE 13)
3. Could not view the ad (THANK AND SKIP TO INSTRUCTION BEFORE 13)

11. How many times have you seen it?

1. Once
2. Two or three times
3. More than three times

12. Now please indicate how much you agree that...

	Strongly Disagree				Strongly Agree
After seeing this ad I am more interested in visiting this state	1	2	3	4	5
This ad shows experiences and places that you are interested in	1	2	3	4	5
This ad shows a place with a unique attitude toward life	1	2	3	4	5
This ad portrays a place that offers vacationers the best of everything there is – in one place.	1	2	3	4	5

12a. Have you taken any leisure trips to California in the past 5 years?

1. Yes
2. No

IF DID NOT VISIT CALIFORNIA AT Q12a, SKIP TO Q22

13. What month did you take your most recent trip to California?

- 1..... JANUARY
- 2..... FEBRUARY
- 3..... MARCH
- 4..... APRIL
- 5..... MAY
- 6..... JUNE
- 7..... JULY
- 8..... AUGUST
- 9..... SEPTEMBER
- 10..... OCTOBER
- 11..... NOVEMBER
- 12..... DECEMBER

14. How many nights did you spend in California during this trip? **RECORD NUMBER**_____

14a. Did you visit other states as part of your trip to California? Please indicate states where you stayed **overnight**.

Arizona
Colorado
Idaho
Montana
Nevada
New Mexico
Oregon
Wyoming
Washington
Other _____

15. How did you travel to California?

- 1.....Drove a car, SUV, truck or RV
- 2.....Airplane
- 3.....Bus
- 4.....Train
- 5.....Cruise ship
- 6.....Other, specify _____

16. As part of your trip to California did you use paid accommodations?

- 1...YES
- 2...NO

17. As part of your trip to California did you stay with friends and/or relatives?

- 1...YES
- 2...NO

18. Where within California, did you go on this trip?

- 1...SAN DIEGO
- 2...LOS ANGELES
- 3...SAN FRANCISCO
- 4...SACRAMENTO
- 5...ANAHEIM/ORANGE COUNTY
- 6...MONTEREY
- 7...PALM SPRINGS
- 8...LAKE TAHOE
- 9...OTHER...specify _____

19. Which of the following did you do as a part of your trip?

Viewing and enjoying natural scenery such as mountains, oceans, etc.	<input type="checkbox"/>
Hiking or camping	<input type="checkbox"/>
Adventure activities such as whitewater rafting, rock climbing, or skiing	<input type="checkbox"/>
Visiting a theme or amusement park	<input type="checkbox"/>
Visiting a winery	<input type="checkbox"/>
Arts activities such as museums, theater performances	<input type="checkbox"/>
Visiting a national or state park	<input type="checkbox"/>
Golf	<input type="checkbox"/>
Visiting a spa	<input type="checkbox"/>
Fine dining or eating at a unique local restaurant	<input type="checkbox"/>
Shopping	<input type="checkbox"/>
Entertainment and nightlife	<input type="checkbox"/>
Watching sporting events	<input type="checkbox"/>
Experiencing the unique culture of the area	<input type="checkbox"/>
Gambling	<input type="checkbox"/>
Visiting small towns and rural areas	<input type="checkbox"/>
Driving on scenic byways or roads	<input type="checkbox"/>
Boating or other water activities	<input type="checkbox"/>
Going to the beach	<input type="checkbox"/>
Visiting activities that are fun for small children	<input type="checkbox"/>
Go sightseeing or take tours	<input type="checkbox"/>
Visit historical sites	<input type="checkbox"/>
None	<input type="checkbox"/>

ONLY SHOW THE ACTIVITIES THEY CHOSE ABOVE PLUS NONE AND ASK:

19a. Of these activities, please indicate if there were any that were a major influence when you selected the destination for this trip. You may choose up to 3.

20. How important were each of the following in your decision to visit California?

	Not at all important				Very Important
Visiting friends and relatives	1	2	3	4	5
Seeing something new and different	1	2	3	4	5
Visiting a specific attraction or event	1	2	3	4	5
Going somewhere with better weather	1	2	3	4	5
Returning to somewhere familiar that you enjoy	1	2	3	4	5

21. Thinking about your overall travel experience in California, would you say it was...

1. Excellent
2. Very Good
3. Good
4. Fair
5. Poor

The following questions are for classification purposes only, and will help us understand different groups of people.

22. What is your marital status? Are you...?

- Married
- Divorced/Separated
- Widowed
- Single/Never married

23. Including yourself, how many people are currently living in your household?

24. How many living in your household are children under the age of 18? _____

25. Which of the following categories best represents the last grade of school you completed?

- High school or less
- Some College/Technical school
- College graduate
- Post graduate degree

26. Which of the following best describes your ethnic heritage? Are you...

- African American/Black
- Asian/Asian American
- Caucasian/White
- Hispanic Origin
- Native American, Inuit or Aleut
- Native Hawaiian/Pacific Islander
- Other
- Prefer Not to Answer

27. What is your age? _____

28. Are you...

- Male
- Female

29. What is your postal code? _____

THANK YOU FOR PARTICIPATING IN THIS SURVEY.