

California Family Initiative



visit
California





Welcome to Kidifornia!

It's no secret that California remains a can't-miss destination for families of all sizes from around the world: With so many of the world's biggest attractions and most iconic destinations, the Golden State is truly a place where kids can be kids — and adults can be too!

California has the uncanny ability to instill a sense of wonder for visitors of all ages, whether they got here from behind the wheel or from atop a car seat. This is a place that unlocks the wildest imaginations, and to that aim, there is no demographic with a greater capacity to dream than kids. It just takes a little bit magic to bring those dreams to life, and California happens to be flush with it.

Now, Visit California is thrilled to take the California family travel product to new heights as one complete, unified brand: **Kidifornia**. And by working in close concert with our industry partners, the brand will elevate the California family experience for a whole new generation of dreamers.

Contained in this strategic marketing plan are the many insights that Visit California has gathered regarding the family audience, as well as the strategy for engaging this key demographic going forward. And as you will see, California's unmatched selection of experiences for every age and interest — from thrill seekers to beach dwellers and everyone in between — is something that reaches across generations to inspire kids and parents alike.

This marks an exciting evolution of Visit California's work in the family space, and it is only the beginning. As these efforts grow in new and exciting ways, we look forward to working with all of our industry partners to showcase everything that ~~California~~ Kidifornia has to offer.

Dream Big,



Caroline Beteta

President & CEO | Visit California



California Family Initiative Executive Summary

In 2016, Visit California launched an integrated global communication initiative targeted at the family segment. Centered around a new creative platform — “Kidifornia” — and deployed across paid, owned, earned and travel trade channels, programming will build on five years of success targeting family travelers and offer new potential to inspire this valuable target audience in fresh ways. To better understand the achievements of Visit California’s family program to date, it is useful to look at historical research and planning efforts used to shape strategy and early program development, along with key performance indicators demonstrating success in reaching and winfluencing this segment.

History of Family Programming: 2012 to 2016

Record capital investment by California theme parks fuels new opportunity to actively target the family traveler.

In 2012, three of California’s major theme parks made record capital investments totaling more than \$2 billion, resulting in new attractions and reasons to visit the Golden State, including The Disneyland Resort’s CarsLand, Transformers: The Ride-3D at Universal Studios Hollywood and SeaWorld’s first major roller coaster, Manta. Visit California assembled a task force of key industry stakeholders to guide development of a new family market segment strategy. A short-term cooperative campaign (“Summer of Fun”) supported the launch of this new product, while planning began for a long-term family initiative to shine a spotlight on California as a premier family travel destination.

Extensive research and planning informs Visit California’s family strategy and positioning approach.

Visit California utilized secondary and primary research to gain a deeper understanding of the state’s competitive advantage and to inform development of positioning and programming for the family market segment.

Secondary research and analysis included:

- Google findings on online family travel discovery and digital behavior of moms;
- MRI data on travel-related attitudes and behaviors of moms;
- TNS intelligence showing the top California activities enjoyed by family travelers;
- DK Shifflet data related to family travel volume.

As part of Visit California’s approach to globalization and to bring greater efficiency and impact to the industry’s marketing program, leading travel market research firm Hall & Partners conducted primary research in 2012. Major investment was comprised of quantitative research conducted in 11 markets: United States, Canada, United Kingdom, Germany, France, Australia, Mexico, Brazil, China, South Korea and Japan.

The key research objectives were twofold:

1. testing several global brand platforms for appeal across markets; and
2. understanding what the target audience thought of California as a travel destination versus domestic and international competitors.

“California’s strength as a family destination is in its diversity — **families can enjoy superb beaches, world-class attractions and stunning national parks.** Theme parks are also one of the biggest draws, with Universal Studios in Hollywood, SeaWorld in San Diego and the original Disneyland in Anaheim, which (as a destination) tends to act as a good barometer for family holidays across the state.”

— Angus Bond, Head of Product & Purchasing, Virgin Holidays — U.K.

The study provided valuable insight, including the observation that “California has established an image built around abundant offerings and family-friendly experiences, which go hand in hand with its fun, energetic persona.” The term “abundance” was defined as a quality that was both ownable and a differentiator for California — one that could be leveraged for the family segment. Strategic opportunities coming out of this insight included the potential to “build on traditional perceptions of delivering on outdoor, family and scenic assets to reinforce abundance” and “having the best of everything in one place.”

Through the research process, Visit California established its family positioning platform:

Positioning

Ultimate Family Playground

Key Messaging

With theme parks aplenty, plus state and national parks, beaches, zoos, aquariums, museums and more, California is a place that thrills kids and brings out the kid in the adults too.

Benefit

Abundant experiences suited to every family member

In 2013, Visit California developed and launched its first family-focused campaign: Playground California.

“Kids at Play,” Visit California’s first family-focused TV commercial, debuted in the United States and Canada in 2013. Featuring kids as principal talent and shown in co-viewing environments, offline and online, “Kids at Play” featured actor Rico Rodriguez of the hit TV show “Modern Family.” The spot leveraged the pervasiveness of technology in a tongue-in-cheek way, juxtaposing kids engaged in fun California activities with tech-speak, and aimed to position California as one giant playground with the “Let’s Play!” attitude to match. Digital channels — both paid and owned — amplified consumer engagement and provided the platform for a multidimensional cooperative marketing program and a Playground California Match-Up Sweepstakes effort. Content partnerships with Nickelodeon and Pandora extended the campaign by engaging key family travel decision-makers both at work and at home with their children.

In 2014, the “Kids at Play” TV spot debuted in the United Kingdom and Australia. In 2015, Visit California invested in a refresh of the family TV commercial: “Kids Unplugged” featured Miles Brown and Marsai Martin from the hit TV show “Black-ish,” and included scenes shot at the LEGOLAND Water Park at LEGOLAND California Resort, Disneyland Park at The Disneyland Resort, The Wizarding World of Harry Potter at Universal Studios Hollywood and Manta roller coaster at SeaWorld San Diego.

Visit California expands its family programming to include digital influencers.

In 2016, Visit California worked with digital influencers to create custom content showcasing California as the ultimate family playground. The campaign tapped popular family bloggers, via partnerships with Time Inc. and National Geographic, which developed native content. Working with WhoSay, the campaign also incorporated celebrity influencers Ali Landry and Nia Long, who shared California vacation experiences with their fans and followers across social media. The combined efforts produced more than 205 million impressions across five markets — United States, Canada, United Kingdom, Australia and Mexico.

Visit California’s investment in the family segment yields positive results.

Between 2013 and 2016, Strategic Marketing & Research Insights (SMARI) tracking demonstrates the positive impact of Visit California’s paid media investment targeting the family segment. The results show positive sentiment among family travelers considering California as a destination, and data shows viewers are enjoying the TV commercials, paying attention to the content and receiving the desired message. Since launched, Visit California’s family advertising has contributed to a significant lift in travel intent and incremental travel to California.

Positive sentiment seen among majority of ad aware family audience.

As shown in Figure 1, SMARI tracking shows that among people with children younger than 18 living at home, “Kids at Play” and “Kids Unplugged” sentiment was overwhelmingly positive across markets. Sentiment is determined by asking respondents to choose between negative, neutral and positive in response to the advertising.

Figure 1

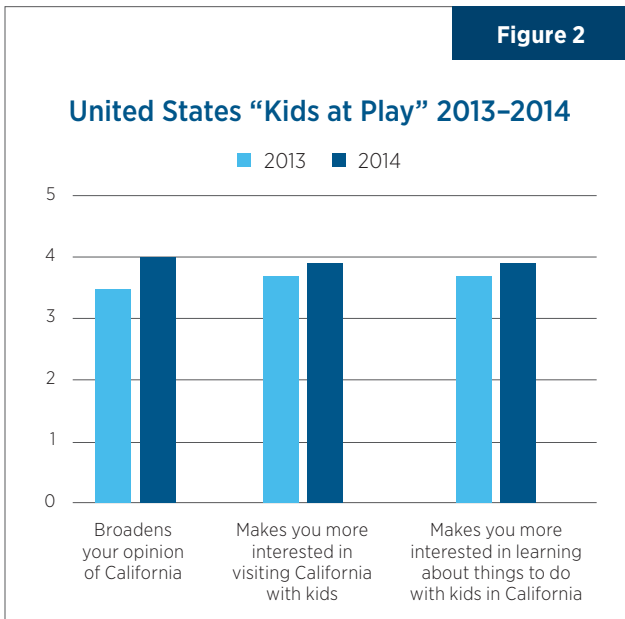
Family Audience Sentiment					
Family TV Spot		2013 “Kids at Play”	2014 “Kids at Play”	2015 “Kids at Play”	2016 “Kids Unplugged”
Positive Ratings	United States	64%	63%	78%	84%
	United Kingdom		80%	87%	75%
	Australia		75%		75%
	Canada	70%	73%	85%	78%

Source: SMARI Spring Ad Effectiveness; blank boxes indicate family TV was not deployed

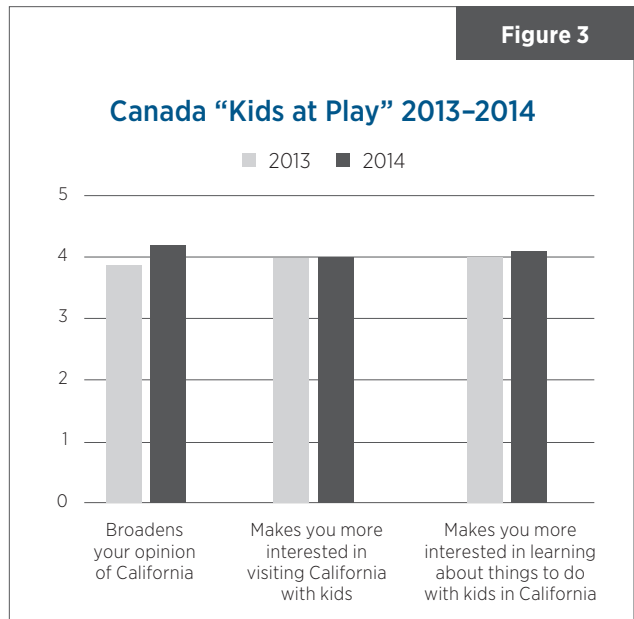
Clear communication of intended messaging.

“Kids at Play” and “Kids Unplugged” successfully delivered the intended family brand messaging among people with children younger than 18 living at home. Messaging was rated on a 5-point agreement scale in SMARI tracking. A rating of 4.0 or higher is in the top 10 percent benchmark level (considered excellent). A rating of 3.8 is in the top 25 percent level (considered good). A rating of 3.5 is average. Based on this, the messaging clearly resonated with the family audience, with the majority of ratings near or above the top 10 percent benchmark.

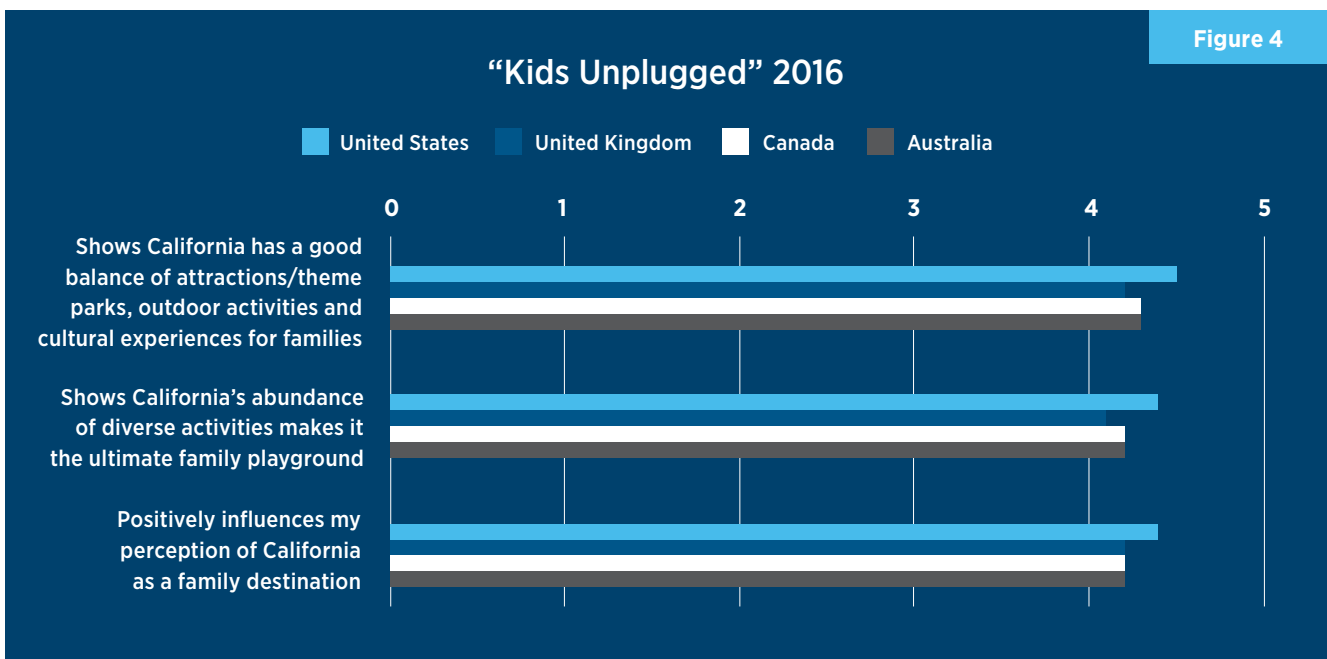
Figures 2–4 show messaging ratings for the family TV spots across the United States, Canada, United Kingdom and Australia. Brand messaging statements were developed for “Kids At Play” and tested in the United States and Canada in 2013 and 2014. In 2016, the messaging statements were evolved for “Kids Unplugged,” to reflect the family positioning and were tested in the United States, Canada, United Kingdom and Australia.



Source: SMARI Spring Ad Effectiveness



Source: SMARI Spring Ad Effectiveness



Source: SMARI Spring Ad Effectiveness

Television is driving strong intent to visit California.

Between 2013 and 2016, intent to visit California increased markedly among family travelers. In the key volume markets of the U.S. and Canada, families aware of the “Kids at Play” and “Kids Unplugged” TV commercials showed stronger intent than those unaware. In the U.S. intent to visit among those aware of the advertising rose from 35 percent in 2013 to 55 percent in 2016.

U.S. Family Target (those with kids at home)	Intent to visit California among those unaware of family TV advertising	Intent to visit California among those aware of family TV advertising
Spring 2013 “Kids at Play”	28%	35%
Spring 2014 “Kids at Play”	30%	34%
Spring 2015 “Kids at Play”	31%	34%
Spring 2016 “Kids Unplugged”	47%	55%

Source: SMARI Spring Ad Effectiveness

Canada Family Target (those with kids at home)	Intent to visit California among those unaware of family TV advertising	Intent to visit California among those aware of family TV advertising
Spring 2013 “Kids at Play”	28%	38%
Spring 2014 “Kids at Play”	25%	42%
Spring 2015 “Kids at Play”	30%	40%
Spring 2016 “Kids Unplugged”	28%	39%

Source: SMARI Spring Ad Effectiveness

Family audience investment is producing strong incremental travel to California.

Since the launch of Visit California’s dedicated family advertising, the percentage of incremental trips and spending by families with children under 18 in the household has grown, demonstrating the distinct value of this segment. In the U.S., where California already garners a significant share of the family travel market, introduction of family specific advertising has more than doubled the percentage of incremental trips and spending since launch. While economic conditions in Canada were challenged due to currency pressures in fiscal year 2015–2016, total incremental trips by the family target aware of advertising still hit 43 percent and accounted for 55 percent of incremental spending.

With the Dream Big Dividend, Visit California will continue to expand its focus on family as a distinct opportunity target globally.

Moving forward, Visit California will expand its family initiative programming with global investment across paid, owned, earned and travel trade activity that promotes California’s unique approach to family vacations and inspires travel from this high-volume segment.

U.S.	Total Incremental Trips	Family Incremental Trips ¹	Family % of Total Incremental Trips ¹	Total Incremental Spending	Family Incremental Spending ¹	Family % of Total Incremental Spending ¹
2013	3,955,920	539,999	14%	\$7,100,000,000	\$1,239,239,847	17%
2014	3,737,816	1,180,007	32%	\$7,000,000,000	\$2,827,609,497	40%
2015	4,299,735	1,185,790	28%	\$9,000,000,000	\$2,998,911,887	33%
Fiscal Year 2015–2016	4,664,754	1,417,996	30%	\$10,450,772,129	\$4,181,010,781	40%

Source: SMARI ROI; shift from calendar year ROI to fiscal year ROI in 2015–2016 ¹ Based on awareness of any advertising among households with kids

Canada	Total Incremental Trips	Family Incremental Trips ¹	Family % of Total Incremental Trips ¹	Total Incremental Spending	Family Incremental Spending ¹	Family % of Total Incremental Spending ¹
2013	231,123	100,368	43%	\$435,000,000	\$207,357,280	48%
2014	264,861	136,486	52%	\$609,000,000	\$335,140,344	55%
2015	200,665	111,707	56%	\$483,802,889	\$290,029,231	60%
Fiscal Year 2015–2016	209,765	90,207	43%	\$441,878,990	\$241,605,508	55%

Source: SMARI ROI; shift from calendar year ROI to fiscal year ROI in 2015–2016 ¹ Based on awareness of any advertising among households with kids



Family Market Overview & Trends

Family travel continues to be a fast-growing segment of the travel industry, with more than one-third of Americans having planned to take a family vacation in 2016, according to AAA. SKIFT estimates the 2016 total market size for family travel is approximately \$112 billion, with mean annual family travel spending at \$3,220. Eighty-seven percent of U.S. families planned to vacation in 2015, up 5 percent from 2010, and respondents in the 2015 U.S. Family Traveler Survey reported taking an average of 3.53 domestic trips and 1.25 international trips with their children in the past year.

In relation to California visitors, 28.9 percent of domestic leisure travel parties included children under the age of 18. While California’s primary market for family travel is domestic, international opportunities also provide key value — 13.5 percent of international visitors come to California with their children, while travelers from China (25 percent), Mexico (24 percent), Canada (20 percent) and Australia (17 percent) bring their children on vacation at even higher rates.

Sources: AAA Family Travel Survey, 2016; SKIFT 2016 — Decoding the Lucrative U.S. Family Traveler Market Segment; U.S. Family Traveler Survey 2015, Family Travel Association; CIC International Study 2014; Canada International Travel Survey 2012; TNS TravelsAmerica 2014

Family travel trends

Today’s families are increasingly modern: Family composition and structure has become more diverse and now includes extended family, including friends, stepchildren, aunts and uncles. Families are also less traditional, with fewer married couples and the rise of non-married couples with kids and same-sex marriages. Men and women are getting married later and having children later. According to SKIFT’s 2016 report, “Decoding the Lucrative U.S. Family Traveler Segment,” the U.S. family travel market has become much more diverse in terms of ethnicity, particularly with respect to Hispanic communities. Hispanic children increased from 9 to 25 percent of U.S. children between 1980 and 2015, as reported by ChildTrends.org.

Of particular note are five key trends that provide insights for reaching and connecting with today’s family traveler.

- 1. The underlying motivation for family travel remains constant: strengthening family bonds.** While many things have changed about the American family vacation over the years, families continue to travel together as a way to strengthen bonds and create long-lasting memories. The 2016 Alamo Family Vacation Survey revealed that 48 percent of respondents cited “spending quality time together” as the most important benefit of traveling as a family.

“Family holidays can be about fun, education or simply reconnecting away from the busy routine of life at home.”

— Angus Bond, Head of Product & Purchasing, Virgin Holidays — U.K.

- 2. Family travelers seek more immersive experiences.** There is a growing trend for more cultural or educational family travel experiences. This trend is linked to the growing desire by all travelers for authentic local engagement, with evidence that certain forms of engagement may be of more interest to the family traveler. The 2016 SKIFT study shows 59 percent of avid travelers with children would consider dedicating a day of their vacation to community service as a form of cultural enrichment; this compares to just 28 percent of those without children.

“The family travel landscape has evolved massively over the last few years, with parents no longer content with fly and flops, instead seeking out experiential travel experiences with their children at their sides. We’ve seen a huge shift away from inquiries about kids clubs, to more probing questions about destinations that offer memory-making experiences and activities the whole family can enjoy together, whether that’s hiking through national parks, kayaking down rivers, learning new skills or seeing wildlife in its natural habitat.”

— Charlotte Wells, Product Manager United States, Abercrombie & Kent — U.K.

3. The desire for new experiences continues to strengthen in family travel. More than half of families taking annual vacations like to mix it up, choosing different locations most times, or every time, they travel — although certain family attractions remain consistently popular. Road trips (69 percent), national parks (49 percent) and theme parks (42 percent) were the most popular types of vacations for families planning to travel in 2016 according to AAA’s Family Travel Survey.

4. Millennial families continue to grow, with the potential to influence travel in new ways. Millennial family travel numbers are growing. Fifty-four percent of U.S. millennials have children in the household, according to a 2015 U.S. Millennial Travelers Resonance Report, and while millennial parents exhibit some similar vacation desires as their older counterparts, there are notable differences, especially in the area of influence. Peers and digital influencers are more likely to influence millennial vacation choices, with 64 percent of millennial parents reading individual reviews online and 60 percent posting their own reviews (MMGY, 2016). There is also greater openness for children to influence vacation choice with millennial parents (HomeAway, 2015).

5. Multi-generational travel continues to grow.

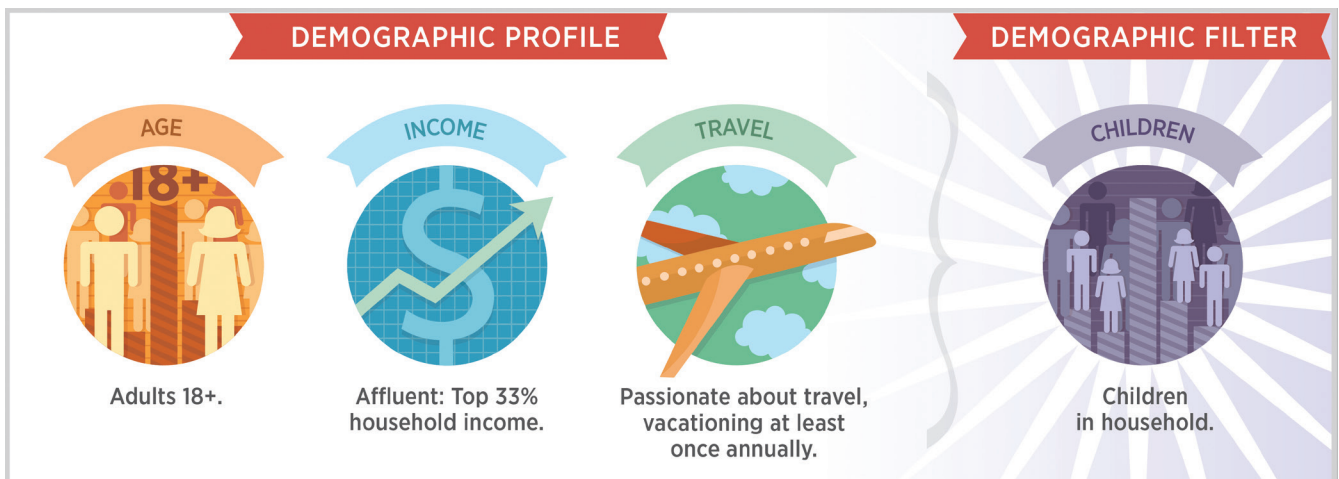
Baby boomers consider multi-generational travel a top motivator for domestic travel in 2017, according to AARP. Multi-generational travel interest also extends to the luxury travel category, with luxury travel advisors Virtuoso identifying multi-generational luxury travel as the top trend for 2016. These trends build upon 2015 data, when multi-generational travel accounted for an estimated 33 to 40 percent of the \$270 billion leisure travel segment.

Sources: SKIFT Decoding the Lucrative U.S. Family Traveler Segment, 2016; Family Travel Association; Travel & Tourism Magazine; Hilton; SKIFT; PRNewswire; Hotel News Now; Travel Channel; Huffington Post; Preferred Hotel Group; ChildTrends.org; 2015/2016 Alamo Family Vacation Survey; AAA Family Travel Survey, 2016; AARP Travel Research: 2017 Travel Trends; Virtuoso Luxury Travel Advisors Survey — 2016 Top Travel Trends; AARP Travel Research, Multi-Generational Travel, April 2015; HomeAway, 2015

California Family Initiative Target Audience — Segment, Sizing & Profile

Demographics

Visit California’s family opportunity target is an integrated but distinct subset of the global brand target audience — affluent adults who are passionate about travel — with the added demographic filter of children in the household.



Geography

To understand the size of the family audience in all Tier 1 markets, Visit California leveraged global media agency Carat’s proprietary consumer insights study (CCS). The family segment was measured as a percentage of Visit California’s global brand target audience base. From the audience-sizing analysis, five Tier 1 markets were identified as priorities for family campaign investment — United States, Canada, United Kingdom, Australia and Mexico.

Market	Percent of Total Population	Percent of Global Brand Target
United States	13%	46%
Canada	3%	24%
United Kingdom	3%	25%
Australia	4%	41%
Mexico	3%	39%

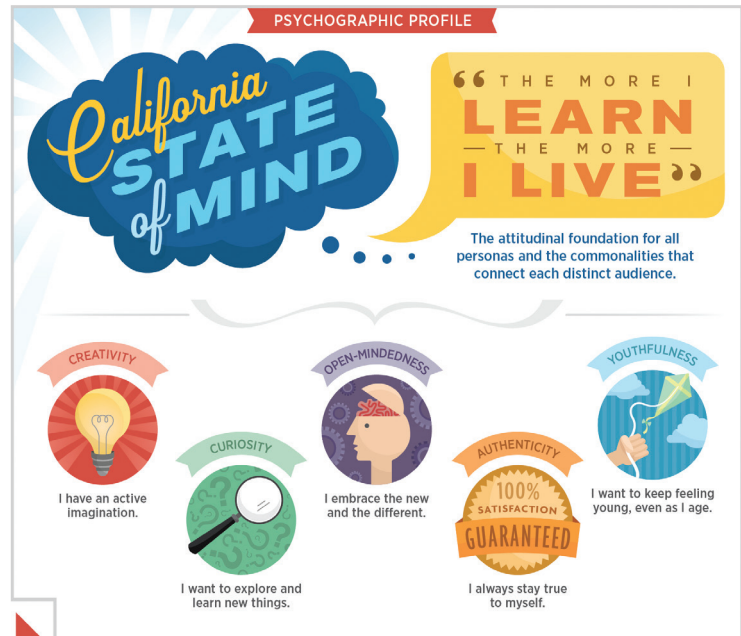
Source: CCS 2014 Benchmark Study (U.S.), CCS 2014 International Benchmark Study (U.K.), CCS 2014 Canada Benchmark Study, 2014 Roy Morgan/CCS Fusion Study (AUS), CCS 2014 Mexico Benchmark Study

Psychographics

Since 2012, when Visit California began its focus on the family segment, the organization has pursued a deeper understanding of what matters to this target audience, as well as what motivates them. In 2014, Visit California explored psychographic modeling through persona development.

Beyond traditional demographics, personas provide a more robust representation of the target audience, humanizing them and providing greater understanding of their behaviors, traits, interests, attitudes and connectors. Personas also allow marketers to be more strategic in refining content and media choices for audiences. Beginning with the United States as a foundation, MRI Doublebase-syndicated research was used in conjunction with relevant Visit California research to build the family traveler psychographic profile, or persona, which includes the following:

- **What matters** — insights into the family traveler persona’s life purpose and values, and why those matter
- **What motivates** — key themes to describe what motivates the persona in life and provide a richer understanding of the family traveler persona’s mindset
- **Media connectors** — media environments that the family traveler persona consumes or engages with the most to help target (or refine) media selection
- **Media partner considerations** — types of media partners that would help to reach the family traveler persona based on their media connectors
- **Content considerations** — types of entice and inform content that resonates with the family traveler persona
- **Commonalities** — finding common areas of alignment that can provide unifying themes to be applied across family and other personas



The California brand was the starting point for persona development. Key psychographic qualifiers/statements that personified the California brand and exemplified a “California State of Mind” were identified as follows:

- Creative — being creative, imaginative
- Curious — wanting to explore and learn new things
- Open-minded — being broad-minded
- Authentic — being true to myself
- Youthful — feeling young

The overarching “California State of Mind” serves as the foundation for all personas, which were developed based on the unique characteristics of each target segment. For family, the persona is Mommy Maximus.

Mommy Maximus Persona (United States). Mommy Maximus is constantly connected and capturing every family moment to proudly be displayed via social media. Maximizing life, from family togetherness to the family budget, and being in the know about the latest trends and travel experiences is what drives her. Her household is in the top one-third of income, and she seeks fun, authentic experiences that generate a sense of shared discovery, create lasting memories and foster family connection across generations.

Mommy Maximus Persona (International Nuances).

In 2015, Visit California conducted additional primary research to create a robust collection of global personas that contained Tier 1 international nuances in relation to the United States. SMARI conducted research for all audience/experience targets, including family. Respondents were recruited based on key demographics including top 25 percent income and behavioral qualifiers, including an interest in visiting California in the next five years. The questionnaire was designed to model MRI psychographic statements used to develop the U.S. base personas, as well as activity motivators from past Visit California research, with a new line of questioning developed for vacation motivators and influencers. The findings revealed a high degree of commonality, with differences used to create nuanced global personas.

Commonalities between Tier 1 international family travelers in terms of vacation preferences revealed that the majority:

- Prefer vacations with great family experiences
- Actively seek out new destinations
- Enjoy trip planning
- Have children who strongly influence the destination choice
- Believe that accommodations are important and it is worth paying more for quality accommodations
- Prefer a free-spirited vacation
- Have higher preference for independent (versus group) travel
- Believe travel to the United States is a way to learn about culture
- Show preference for both relaxed and active vacations
 - * Both are desired in nearly all countries, but relative preference differs: In Canada and China there is a higher preference for relaxation; the United Kingdom and Australia have equal desire; and Brazil and Mexico demonstrate more interest in active vacations

Decision-making in the majority of Tier 1 countries is equally likely to be solo or with a spouse. In China and Brazil, however, it is most likely to be a sole decision-maker, with most being male.

In relation to nuances between international Tier 1 markets, China has relatively more differences. Compared to other Tier 1 markets, Chinese family travelers are less motivated to travel independently and possess relatively lower belief that children influence the destination. In addition, relaxation and pampering have higher importance to them and there is greater emphasis on vacations that reflect status and style.

As a result of these findings, the following international key nuances were added to the Mommy Maximus persona:

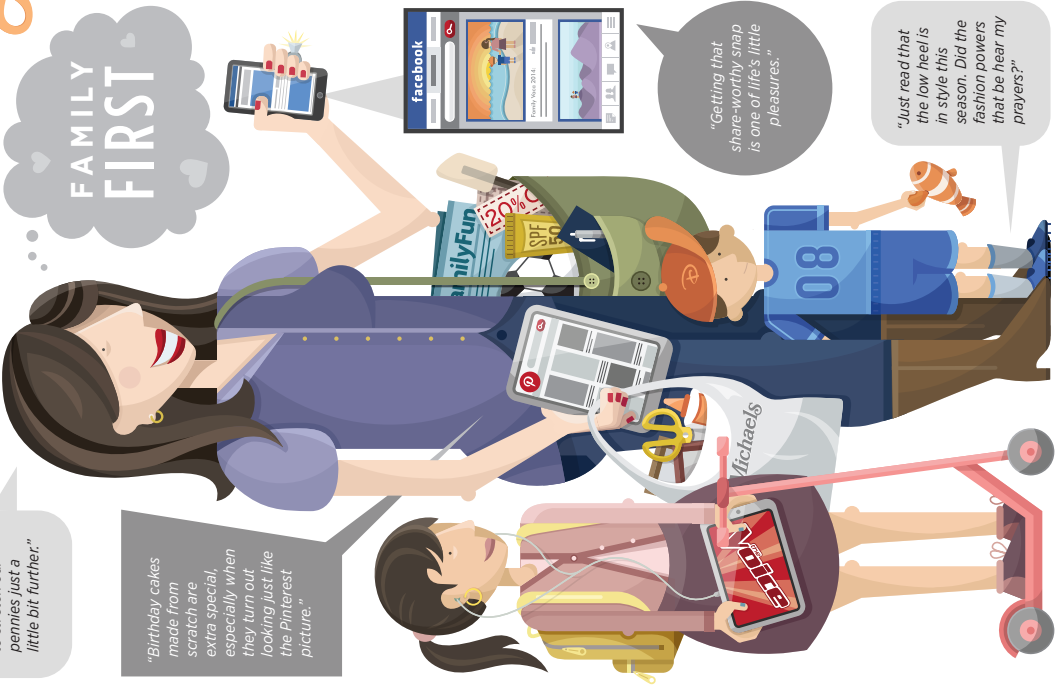
- International family travelers are regularly on social media but are less likely to be constantly connected
- The majority of international family travelers would like to be careful with money; however, this is less of a concern in China, where more emphasis is placed on quality
- There is higher value placed on social status and material possessions in China

Mommy Maximus

GLOBAL FAMILY PERSONA

"There are always plenty of opportunities to stretch our pennies just a little bit further."

"Birthday cakes made from scratch are extra special, especially when they turn out looking just like the Pinterest picture."



WHAT MATTERS?



I'm constantly connected.
Social media is the lifeline for Mommy Maximus, and placing the family on a pedestal to other family members and friends motivates regular sharing.



I make our money work harder.
Mommy Maximus keeps the family on track financially, and constantly seeks out offers and discounts to stretch the budget.

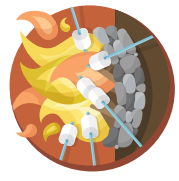


I want to know what's hot.
While not a trendsetter, Mommy Maximus looks to others for advice and information to stay in the know about the latest trends.

WHAT MOTIVATES?



I capture every moment.
Enthusiastically taking on the role of family director and documentarian, Mommy Maximus displays family pride daily via social media.



I don't want to miss a thing.
Maximizing family time is critical, and budget-friendly, shared experiences are actively sought out for togetherness.



I like creativity in my life.
Mommy Maximus uses social media channels regularly as a source of ideas, tips and visual inspiration when looking for new, unique ways to stretch the family budget.

International Family Traveler: Key Nuances

- These travelers are regularly on social media, but less likely to be constantly connected.
- Wanting to be careful with money is less of a concern in China, where more emphasis is placed on quality.

International Family Traveler: Key Nuances

There is a higher value placed on social status and material possessions in China.

CONTENT CONSIDERATIONS

Snackable, shareable, lighthearted content with a strong emotional pull resonates with Mommy Maximus. They respond to information, inspiration and cool ideas for the family from influencers, and tips to fuel travel ideation from relevant parent bloggers.

“California offers the perfect outdoor playground for adventure seeking families: from exploring Yosemite — on foot, from the water, or from the air — to taking a VIP tour of Universal Studios; learning to surf, or sailing an America’s Cup Yacht around San Francisco harbor to taking a bike tour of its many idiosyncratic neighborhoods. **It’s not always easy to find a destination that works for the whole family,** but for many of our clients, looking for the ultimate no-compromise destination, **California ticks all the boxes.”**

— Charlotte Wells, Product Manager United States, Abercrombie & Kent — U.K.

Product experiences

Family travelers seek common activities regardless of origin market. Both the global persona research and SMARI data show the following activities motivate the majority of U.S. and international travelers to California:

- Take kids to the beach
- Enjoy natural scenery
- Visit a theme park
- Visit a state park
- Visit a historical site
- Visit a zoo or aquarium
- Visit a science museum
- Visit scenic byways or roads
- Hollywood/celebrity sightings

Children influence many aspects of family decision-making, and vacation travel is no exception.

A recent HomeAway Kidfluencer Survey showed that more than 80 percent of parents in the United States give their children some say in deciding where they want to go on vacation. The survey also reports that most U.S. parents let their children make decisions on the activities (77 percent), itinerary (53 percent) and type of destination (49 percent). Similarly, Visit California’s global persona research revealed that for nearly all Tier 1 international family travelers (Australia, Brazil, Canada, Mexico, United Kingdom) children strongly influence the choice of destination.

Why are children allowed to have such influence? A 2015 Expedia survey showed that 89 percent of parents say it is more important for their children to have fun on vacation than themselves. This motivation fuels parents to seek out their children’s vacation preferences. In the United States, 60 percent of parents view kids’ input as a way to ensure kids get more out of the vacation, according to HomeAway.

However, keeping everyone satisfied is not always easy. Family Traveler Survey respondents in the United States indicated that “finding adult time while traveling with children” and “finding a destination or activities everyone will enjoy” can present somewhat of a challenge.

The nature and degree of vacation influence changes with a child's age.

Much younger children's influence is more indirect, with parents trying to predict (and then experience) what will make their children happy on vacation. However, 32 percent of American kids 6-to-11-years-old believe they decide on the final destination most or some of the time. Even though under-12-year-olds may have relatively less influence than their older counterparts, family vacations may in fact be more tailored to their needs.

MMGY's 2016 Portrait of the American Traveler defined a micro-segment of travelers as "The Brat Pack" — families with children ages 12 and younger who influence vacation-planning decisions. Three in four of these Brat Pack families say they choose vacation destinations based on children's activities, compared to two-thirds of travelers with teenagers. In addition, six in 10 report their vacation is completely child-focused, versus a quarter of travelers with teenagers. Tweens and teens have greater direct influence, including helping to search for information.

Children have a definite point of view on where they want to go, what they want to do and what they want to get out of it. Sixty-three percent are in search of new adventures and doing things they would not be able to do at home. Theme parks are a top hit for younger travelers (54 percent of 6-to-12-year-olds), and trips to the beach are also popular (nearly 20 percent of all ages). Differences by age include a greater desire for big city travel by teens (10 percent) versus children 6-to-12-years-old (5 percent).

Sources: YouGov HomeAway 'KidFluencer' Survey, 2015; SMARI Global Persona Study 2015; Family Travel Association; Journal of Tourism Consumption and Practice Volume 2 No.1 2010 — Tween Tourists: Children and Decision-Making; MMGY 2016 Portrait of the American Traveler

Product discovery

Family vacations are important to Mommy Maximus and she works hard to find the right kind of vacation for her family. Mobile devices are her lifelines to the world, with social media (Facebook, Instagram, Pinterest) used frequently throughout the day to share experiences, photos and status updates. Snackable content with a strong emotional pull resonates with her and influences her product discovery search. She responds to vacation information, inspiration and ideas from influencers, and she welcomes tips from relevant parent bloggers. Social media posts from her friends, showing what they are doing and enjoying on vacation, also hold influence with Mommy Maximus.

Millennial family traveler nuances

Millennials are moving into the mainstream across all purchase categories, including travel. The millennial family travel market is growing as millennials age up. Millennials (14.3 million) have surpassed Gen X (12.8 million) in the U.S. family traveler market, with baby boomers (6.8 million) trailing both. Fifty-four percent of U.S. millennials have children in the household, according to a 2015 U.S. Millennial Travelers Resonance Report. As such, a family vacation with kids is one of the top vacations for millennial travelers.

When considering a vacation, millennial parents exhibit similar desires to travelers from other generations. They place safety and cost high on the priority list, and once-in-a-lifetime trips — including a family vacation to well-known entertainment resorts — are also a top priority. Ed Tapan, Google's Head of Industry, Travel, confirmed this at the 2016 TMS Family Travel Summit, stating: "You just have to tweak the message and deliver it in their [millennial] language."

However, there are some notable differences. Millennials as a whole place greater emphasis on the importance of experiences, including travel. Seventy-eight percent of millennials would choose to spend money on a desirable experience over buying something desirable (Eventbrite, 2014). According to Resonance Consultancy, millennials take more vacations per year (4.2) than other categories surveyed (3.5). In terms of what they are looking for in a vacation, Resonance reports that the millennial family traveler — comprising 20 percent of all millennial travelers with nearly two-thirds (63 percent) female — is seeking fun attractions (89 percent) and learning new things (85 percent) with educational experiences benefiting both children and adults. Social media and peers influence vacation choices for this segment. According to MMGY, 64 percent of millennial parents read individual reviews online, with 60 percent posting their own reviews. Compared to their older counterparts, millennial parents are more likely to let their children influence the vacation. A 2015 HomeAway survey found that 34 percent of U.S. millennial parents allow their kids to make the final decision on vacation destination, compared to 8 percent of U.S. parents age 55+.

Sources: Takingthekids.com; MMGY 2016 Portrait of the American Traveler; Portrait of the U.S. Millennial Traveler, 2015 by Resonance Consultancy; D.K. Shifflet; YouGov HomeAway 'KidFluencer' Survey, 2015

California Family Initiative Positioning & Campaign Platform

As outlined in the executive summary, California is positioned to offer a different kind of family vacation, one that is tied to the state's brand foundation of abundance.

Positioning – Ultimate Family Playground

Key Messaging – With theme parks aplenty, plus state and national parks, beaches, zoos, aquariums, museums and more, California is a place that thrills kids and brings out the kid in the adults too.

Benefit – Abundant experiences suited to every family member

Coupled with abundance is the California Attitude, the state's distinct brand character. Visit California's approach of using kids as storytellers — as seen in the “Kids at Play” and “Kids Unplugged” TV commercials — embodies this unique attitude and provides the emotional hook to resonate with Mommy Maximus.

Moving forward, Visit California will expand its global family programming, reaching and inspiring Mommy Maximus in fresh, compelling ways under a new campaign platform called “Kidifornia,” in which the power of kids will continue to be leveraged.

Campaign Platform – Kidifornia

Campaign Messaging – With so many awesome options for family fun, California is one of the most kid-friendly places on the planet. Translation: California is made for kids. And if we're made for kids, let's rename the state “Kidifornia” and let kids rule!



Competitive landscape

Secondary research reveals a wide range of U.S. family-friendly travel destinations recommended by the media — from Orlando and New York to Myrtle Beach, S.C. While many destinations offer family experiences, discernible family positioning approaches are few. Rather, family messaging tends to be part of an overall campaign.

Figure 5 summarizes the family positioning or messaging of key competitive destinations. While not an exhaustive list, these destinations were chosen based on primary SMARI research indicating the top U.S. destinations for desirability, likelihood to visit, and visitation among family travelers. Excluding California, Florida, New York and Hawaii rank highest. While not top for desirability, Texas and Nevada are strong on likelihood and actual visitation. The United Kingdom was included for international contrast.

Key observations reveal that most campaigns focus on generating inspiration and consideration, with some promoting offers and deals. In terms of messaging, there are two main approaches: promoting the emotional benefit of creating family memories (e.g. Orlando, Idaho) and promoting the value of unexpected family/child adventure and exploration (e.g. New York, Florida). Generally, family is featured as part of an overall destination campaign without distinct positioning or a tagline.

Assessing the competitive landscape confirms the inherent strength of California's positioning, which offers a differentiated approach for promoting California to the family target. Distinct from existing competitive approaches centered primarily on the creation of memories or family/child adventure and exploration, the California positioning has the ability to embody the California attitude and present the state's breadth and depth of family experiences in ways that break through.

Figure 5

Destination	Family Positioning	Message
Orlando, Florida	Dedicated family campaign: “The Never-Ending Story”	<ul style="list-style-type: none"> • Visit Orlando campaign = “The Never-Ending Story”; Family-targeted campaign promotes emotional connections if visitors • Global platform for visitors to tell stories and share memories; includes TV commercials, websites, social campaign • Some individual attractions also have their own positioning (e.g. Universal = Vacation Like You Mean It)
Florida	Family executions in overall campaign: “Must be the Sunshine”	<ul style="list-style-type: none"> • Family-focused messaging is part of the “Must be the Sunshine” campaign • Family specific executions celebrate new or unexpected things children are inspired to do on a Florida vacation • Family targeting also part of #lovefl, where people encouraged to post images of Florida and “Share the Sunshine”
New York	Family ambassador in overall campaign: “I Love New York – Explore with Dora”	<ul style="list-style-type: none"> • Family ambassador, cartoon character Dora the Explorer • Messaging is tactical (“Explore with Dora”) and within overall “I Love New York” tagline and positioning • Messaging encourages family travel to NYC five boroughs, highlighted as a family-friendly destination
Texas	Family executions in overall campaign: “It’s like a Whole Other Country”	<ul style="list-style-type: none"> • Part of overall Texas campaign, family executions highlight beach and family entertainment attractions • Online ads drive to family-themed content “hit the Texas beaches” • Family travel section on Travel Texas website
Hawaii	No Family Executions or campaign, instead offers, activity suggestions	<ul style="list-style-type: none"> • Family offers on Hawaii website; show Family offers and activities on website but no dedicated Family section • Ads and website do not lead with or heavily feature kids or families
Nevada	No family executions or campaign, instead suggested family itineraries	<ul style="list-style-type: none"> • Family itinerary suggestions on Nevada and North Lake Tahoe websites • Website content framed as part of overall Nevada brand positioning = “A World Within, A State Apart”
United Kingdom	Family ambassador in overall campaign: “See Britain through Paddington Bear’s eyes”	<ul style="list-style-type: none"> • Family effort is part of GREAT Britain campaign • Fictional Paddington Bear character acts as brand ambassador • Visitors encouraged to take selfies at locations around the country using the hashtag #PaddingtonsBritain
Wales, United Kingdom	Dedicated family campaign: “Have You Packed for Wales?”	<ul style="list-style-type: none"> • Family targeted campaign aims to attract global visitors to Wales • Positions Wales as place to have adventure, to explore and to enjoy time together as family • Television ads and additional promotion in a range of media, including PR

California Family Initiative Marketing Objectives & Strategies

The following goals and strategies draw on insights into the family target audience and the unique qualities and strengths of California’s family positioning.

Objectives

- Build top-of-mind awareness of California as a premier family travel destination.
- Fuel discovery of California family content, deepening engagement and creating desire for the California experience.

Strategies

- Leverage the power of kids to communicate “California is now Kidifornia” and showcase the state’s family experience through lighthearted, emotionally charged storytelling.
- Showcase an abundance of family offerings, from the iconic to the lesser known, to demonstrate California is the Ultimate Family Playground.
- Use digital influencers to illuminate the California family experience in relevant ways and channels.
- Activate around #Kidifornia, inviting consumer participation and user-generated content.

Storytelling approach

Kidifornia storytelling will be approached through a blend of content that provides both inspiration and information.

Communication channels

Visit California will deploy a range of marketing activity across paid, owned and earned media channels, as well as through the travel trade. In the paid space, a robust multi-channel campaign that capitalizes on the Mommy Maximus target’s propensity for digital and social media will be deployed alongside TV and online TV. Earned and owned channels will act as layers of support providing industry stakeholders with expanded content opportunities, with travel trade amplifying family messaging to influence travel decisions through educational efforts with key trade audiences.

ENTICE Storytelling	INFORM Storytelling
<p>Includes content that spotlights California as “Kidifornia” — a place with so many bucket list-worthy theme parks, museums, national parks, beaches and kid-friendly experiences, it feels like it was custom-made for kids. Content should resonate with the Mommy Maximus target, but kids and a kids-eye-view of the state should take center stage in the storytelling. This can include kid-led adventures and itineraries, kid-rated activities, and insightful, funny “kids being kids” moments in this land of endless fun and family bonding.</p>	<p>Includes content that highlights California’s abundance of family product and experiences reinforcing the “ultimate family playground” promise and delivering valuable information to aid Mommy Maximus in getting the most out of her next family vacation or holiday. Inform storytelling acts as an “insiders” guide and source for ideas, tips and useful resources.</p>

Kidifornia Campaign Creative

“Welcome to Kidifornia” television spot

In this fun-filled new commercial, the roles of parents and kids are reversed. The children are in charge and sharing their tips on how to get the most out of your next family vacation in Kidifornia.



“Welcome to Kidifornia” television storyboard



Cut to a young girl floating on a raft in Lake Tahoe. Her dad jumps off a boat splashing her.

TWEEN: But, there's things you gotta know first.

GIRL: Welcome to Kidifornia—it's super fun for parents.



Cut to Chloe Kim standing with her board on Mammoth Mountain. Her dad boards up, a little out of control, and knocks into her.

CHLOE: Schedule lots of activities.



Cut to family in at Crissy Field in San Francisco. “Cranky dad” is visibly frustrated as he tries to fold up a tent. The kids sit next to their other dad who is napping.

GIRL: And naps.

BOY: They get cranky.



Cut to a family in the Redwoods. Over-protective mom is applying an excessive amount of sunblock to her son's face.

BOY (HIS FACE WHITE AND COVERED WITH SUNBLOCK): Sometimes they can be a little... weird.



Cut to the family listening to a street musician/ band on Santa Monica pier. Mom and dad are having a great time and dancing awkwardly.

GIRL: Ouch.



Cut to a mom and dad kissing in front of the Unconditional Surrender statue in San Diego. Their son disapproves and covers his eyes.



Cut to the family riding the Radiator Springs Racers at Disney California Adventure.

GIRL: After all, it's pretty exciting for them.



Cut to the kids standing in front of boulders in Joshua Tree, the parents crest the top of a high bolder in the background with a yell and wave to the kids.

GIRL: Keep them on a short leash.

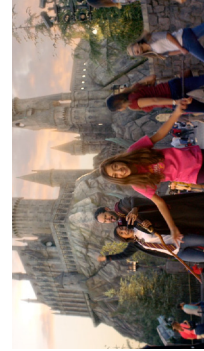


Cut to a wide shot of the Radiator Springs Racers

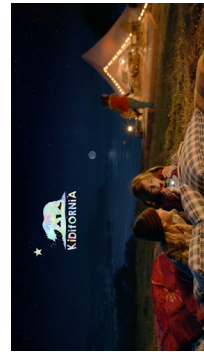


Cut to the family at the San Diego Safari Park, feeding giraffes.

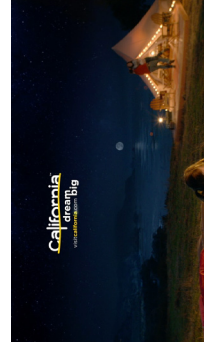
GIRL: They don't do this stuff every day.



Cut to a family at the Wizarding World of Harry Potter at Universal Studios Hollywood. The parents are decked out in Hogwartz attire and visually excited to be there. They take a selfie.



Cut to a family camping in Big Sur. The dad happily carries mom into their tent in the background.



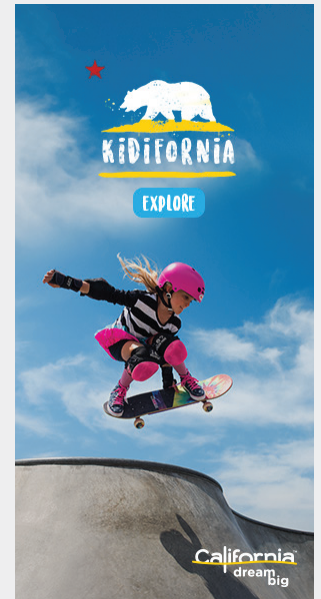
LOGO: California – Dream Big

VO: Kick off your California vacation at visitcalifornia.com

“Things That Rule” digital display

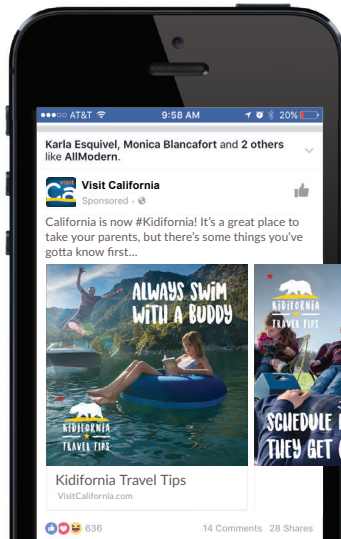
Using imagery that is genuine, emotional and embodies a spontaneous, lighthearted feel, coupled with a simple-but-powerful copy construct, the digital display creative celebrates all that is great about family vacations in Kidifornia, where kids rule.

“Things That Rule” Digital Display Storyboards



“Kidifornia Travel Tips” / #Kidifornia

Taking direct cues from the “Welcome to Kidifornia” television spot, “Kidifornia Travel Tips” announce that California is now Kidifornia — a great place to take your parents — and offer up helpful hints to know before you go. The campaign hashtag, #Kidifornia, will be used to encourage participation and fuel user-generated content efforts, including inviting visitors to share their Kidifornia family vacation photos.



Kidifornia Campaign Programming

PAID MEDIA CHANNELS

To launch Kidifornia, Visit California conducted an RFP process to find media partners that could provide a global stage and connect with the Mommy Maximus target across the most used channels and devices. As indicated by the research, Mommy Maximus is a heavy social media user, so establishing presence within this space was critical. So too was the ability to deliver highly visible, highly impactful creative opportunities that break through the clutter while also showcasing the ability to use data collected to develop unique user profiles and make each exchange richer and more impactful.

A two-pronged strategy was developed for the paid media program:

- 1. Launch** the program at higher media weight levels for optimal reach and impact.
- 2. Create** a sustained media layer that emphasizes engagement and media efficiency over the duration of the campaign.

The Kidifornia global paid media campaign combines TV and online TV targeted in co-viewing environments with digital media targeted to Mommy Maximus as she is engaged in social media; being entertained and informed through consumption of content; and researching travel. The media partners selected — Facebook, National Geographic and TripAdvisor — have the ability to deliver a highly engaged audience at each level. These global programs will be paired with localized layers in each market.

Global media partner: Facebook

Facebook is the world's largest social media platform, reaching more than 1.7 billion users per month. Beyond its size, Facebook is arguably the most nimble of all media channels — using its massive reach to develop audience insights and profiles at a scale that few can match. However, targeting is only one facet of what makes Facebook an attractive launch platform; the other is the creative opportunity the platform provides. Advertiser messaging is in-stream (highly visible), platform-specific (relevant) and device agnostic (looks brilliant wherever placed). All these factors lead to a deeper connection with the target audience, reduced waste and a more effective program overall.

During the launch phase, Facebook will be leveraged to generate impact through a “takeover” of the target audience. Visit California, in conjunction with the Facebook team, used key data points to create a user profile that mirrors the Mommy Maximus target in all Tier 1 target markets. At launch, Visit California will deploy a highly weighted media program designed to engage close to 80 percent (maximum allowed) of moms over a seven-day period (at a frequency of 2.5–3 times). Following the launch, a sustain phase will continue connecting with the target at a reduced weight for the remaining 11 weeks of the program.

Facebook programming recap:

- Mom “Takeover” (seven days, 80 percent reach target)
- Video units
- Carousel units
- Facebook and Instagram presence

Global media partner: National Geographic

National Geographic (NatGeo) boasts 23 million monthly active users worldwide to its robust library of original content, with category-leading social media content that reaches more than 52 million across all channels. This combination of content and social presence, paired with robust targeting capabilities, makes NatGeo an excellent avenue to reach moms while they are engaging with contextually relevant content.

Through Instagram and Snapchat takeovers (of organic content), content sponsorships, and digital traffic drivers, the Kidifornia message will be shared across all of NatGeo's owned properties. Outside of social media content, users who look to engage further will be driven to Kidifornia content on VisitCalifornia.com.

National Geographic programming recap:

- Four Instagram Takeovers
- Snapchat Discover Takeover
- Travel content targeting
- Display banners

Global media partner: TripAdvisor

TripAdvisor is the world's largest travel site, reaching 390 million users across 49 markets worldwide. Viewed as the top travel research companion for all stages of research, TripAdvisor offers a unique ability to connect with consumers based on a combination of contextual/topical relevance and audience insights. Leveraging insights about consumer focus and intent, Visit California will use this platform to share Kidifornia messaging and launch the program with an audience that possesses a travel-focused mindset.

Visit California will launch a takeover of moms in active research during the first week of the campaign, owning

100 percent of moms looking for U.S. or California content. While some users may be further down the decision funnel, serving Kidifornia messaging to this active traveler target holds value for future consideration.

TripAdvisor programming recap:

- Audience/content takeover (seven days)
- California content sponsorship
- Behavioral target placements
- Display banners

Localized programming

To complement the global efforts, localized media programs were developed in each target market. These programs will support the larger-scale launch efforts while providing unique engagement opportunities in each country. Outside of the launch elements, the strategy of creating impact through engagement was carried into the localized layers.

Following are the localized media partners for each market:

Country	Impressions
United States	Time Inc., Pinterest
Canada	Bell Media
United Kingdom	InSkin, Widespace
Australia	M9
Mexico	Prodigy.msn, Quién, Disneylatino.com, Sojern, Smartclip, Eikon Digital, Napperz

Campaign timing & investment

The fully integrated Kidifornia paid media campaign debuted Feb. 6, 2017 and runs through April 2017.

DIGITAL	Impressions	Investment
United States	111,327,073	\$1,050,000
Canada	17,644,071	\$199,978
United Kingdom	23,913,727	\$300,053
Australia	18,986,297	\$274,899
Mexico	54,958,058	\$399,899
TOTAL	226,829,226	\$2,224,828

TELEVISION (TV)	Impressions	Investment
United States	505,811,694	\$3,494,065
Canada	35,897,400	\$151,216
United Kingdom	0	\$0
Australia	0	\$0
Mexico	0	\$0
TOTAL	541,709,044	\$3,645,281

ONLINE TELEVISION (OTV)	Impressions	Investment
United States	29,652,091	\$931,024
Canada	5,899,285	\$70,115
United Kingdom	2,013,000	\$86,100
Australia	1,333,333	\$60,536
Mexico*	13,509,000	\$193,696
TOTAL	52,406,709	\$1,341,471

TOTAL PAID MEDIA INVESTMENT	Impressions	Investment
United States	646,790,858	\$5,475,089
Canada	53,541,471	\$351,194
United Kingdom	23,913,727	\$300,053
Australia	18,986,297	\$274,899
Mexico	54,958,058	\$399,899
TOTAL	789,190,411	\$6,801,133

*Living the Dream TV with family scenes


OWNED MEDIA CHANNELS

Given the abundant supply of family-friendly activities available across California and the massive audience seeking information about these attractions and destinations, it follows that family content is an essential component of Visit California's owned channel efforts. The family experience entry page on VisitCalifornia.com is one of five primary content pillars and serves as both a content destination as well as a landing page for the bulk of Visit California's paid media efforts. Accordingly, this page is updated constantly with timely and topical content that targets this segment and ladders up to current campaigns. The goal here is to help consumers sort through their many vacation options;

provide them with ideas, information, and inspiration; and then hand them off to industry partners to continue down the path to booking a trip.

Time Inc. leads Visit California's owned channel content efforts and brings a wealth of strategy and expertise to the ideation and creation of family content. Operating in a brand newsroom capacity with Visit California, veteran Time Inc. staffers hold weekly editorial meetings in Sacramento, managing a pipeline of family content opportunities. SEO-driven insights are a fundamental aspect of these meetings, as Time Inc. continually monitors family target search queries to 1) ascertain their vacation interests and 2) ensure that VisitCalifornia.com houses the right content to meet their needs. Additionally, Time Inc. operates a proprietary Social Listening tool that monitors social media posts and comments across the globe. Insights provided by this technology guide decisions regarding the types of family content that would best attract and serve this demographic.

California **dream365** Children. Family. **8 Great Spots to Take an Adventurous Daughter** E-NEWS MAP



8 GREAT SPOTS TO TAKE AN ADVENTUROUS DAUGHTER

SCROLL TO DISCOVER

California is home to girls who skateboard, ski, and surf with the big boys—and, like Orange County skateboarder Bella Kenworthy, frequently beat them at their own games.

That adventurous spirit is contagious too. On California's beaches, mountains, deserts, and rivers, there are blood-pumping activities that any half-pint can embrace—and grow in the process. Rafting trips, for instance, "are a great way to learn about the natural environment and our cultural heritage," says Steve Mankie, of the Angels Camp-based tour operator O.A.R.S. "Parents can watch as their kids gain confidence and learn to work together in the boat." Plus, he adds, "there's no Wi-Fi on the river, so rafting trips are a great way to interact with each other."

Want to inspire your thrill-seeking daughter? Here are eight great places to cultivate her love of adventure.

Camping under the redwoods
Redwood National and State Parks

Redwood National Park, with its tucked-in-the-woods campsites in the shadow of gigantic trees, is great for the outdoorsy kid who is ready to go beyond car camping. If either you or she wants a few more amenities, go to area state parks, like Prairie Creek Redwoods State Park near Orick, stay in the aptly named Elk Prairie area and you might get close-up views of huge Roosevelt elk.

Train to be a volcanologist
Lassen Volcanic National Park

This national park in the Shasta Cascade region offers an excellent crash course in volcanoes, since it is home to all four main kinds: shield, plug dome, cinder cone, and composite volcanoes. The park's Junior Ranger program helps young volcanologists learn to identify the different kinds of volcanic rock found around the park (can you tell a basalt from a rhyolite?), and discern which animal tracks they might see along trails.

Ride horses along a windswept beach
Mendocino County

Beaches are for more than just building sandcastles. Instead, load your little bucketette on a trail ride out to wild and windswept Ten Mile Beach in Mendocino County. The guided rides with Buncher Ridge Ranch are good for ages six and up, and they start across from MacKerricher State Park, just north of Fort Bragg.

Rafting the American River
Gold Country

Kids with adventurous spirits as young as seven can handle Class III rapids, according to the seasoned guides at O.A.R.S. And the perfect place to let them rock and roll (safely) down the river for the first time? A half-day float down the South Fork of the American River near Sacramento. Outfitters such as O.A.R.S. offer a full slate of introductory, family-friendly trips—especially fun on warm summer days. If you have older daughters (ages 12 and up) with whitewater rafting experience, consider taking on the Class III and IV rapids on the South Fork or Middle Fork American, both near Auburn.

MORE IDEAS

- VIDEO - BELLA KENWORTHY BRINGS GIRL POWER TO THE SKATE PARK >
- SPOTLIGHT: REDWOOD NATIONAL & STATE PARKS >
- SPOTLIGHT: LASSEN VOLCANIC NATIONAL PARK >
- BEACHES & HIRES ALONG THE MENDOCINO COAST >
- THE AMERICAN RIVER >
- BODIE STATE HISTORIC PARK >
- MOANING CAVERN >
- EXPLORE BISHOP >
- 12 GREAT BEACHES FOR KIDS >
- CALIFORNIA RIVER RAFTING ADVENTURES >

MORE RESOURCES

- REDWOOD NATIONAL & STATE PARKS CAMPGROUNDS
- LASSEN VOLCANIC NATIONAL PARK
- BODIE STATE HISTORIC PARK
- O.A.R.S. ON THE AMERICAN RIVER

See More

Visit California also sees to it that Dream365TV videos such as “Bella Kenworthy and the Pink Helmet Posse” are supported by text-based owned channel content like “8 Best Skate Parks in California,” an article that engages both parents and kids.

Social media overview

Extensive, ongoing social efforts support and enhance these owned channel initiatives. Led by social media agency ICUC, Visit California engages with the family segment via Facebook, Instagram, Pinterest and Twitter to connect with more than 2 million fans and followers. Visit California highlights family-focused content through social media, then encourages consumers to visit VisitCalifornia.com for the full story. By posting two-to-four pieces of highly engaging and informative content per day across various social channels, Visit California showcases the best of California — both for the young and for those who are young at heart.



Visit California @VisitCA Follow

12 hotels to put you and your family in the holiday spirit! #VisitCalifornia bit.ly/2fbLPHD

RETWEETS 14 LIKES 16

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1 14 16

California
dreamBig

THE WIZARDING WORLD OF HARRY POTTER
Whether you root for Gryffindor or Slytherin, this attraction-and-ride zone offers a fully immersive Hogwarts experience for all ages.
[LEARN MORE](#)

A DOG-FRIENDLY BEACH VACATION
Traveling with a four-legged friend? See our guide to coastal Ventura County, where dogs are welcome to join in on activities.
[LEARN MORE](#)

Q&A WITH NBC'S NATALIE MORALES
The journalist tells us her favorite things about her new life in Los Angeles County —from family hiking spots to tasty tacos.
[LEARN MORE](#)

7 PLACES TO VISIT FROM 'LA LA LAND'
Be Emma Stone and Ryan Gosling for a day (or a week) in L.A. Use our guide to create your own tour from this award-winning movie musical.
[LEARN MORE](#)

HOLLYWOOD WALK OF FAME TRIVIA
The first person to receive a star on the Walk of Fame in Hollywood was actress Joanne Woodward in 1960.
[LEARN MORE](#)

NEW YEAR, NEW BARBECUE
Santa Maria is known for a style of barbecue unique to California. Check out our roundup of delicious hotspots.
[LEARN MORE](#)

S.F.'S GREAT PERFORMANCES
Want to attend a world-class opera, ballet, or theater performance? San Francisco offers shows every night of the week.
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ULTIMATE ROAD TRIPS
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2017 CALIFORNIA VISITOR'S GUIDE
View online or order your free official state guide and travel planner.

STAY TUNED

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Visit California and ICUC share industry-supplied content via social media, spurring straight-to-industry interaction. Social intelligence and constant reporting, provided by ICUC, enable Visit California to tap into valuable influencer conversations. Round-the-clock moderation allows Visit California to have an ear to the latest trends and social news. Social platforms also enable Visit California to work closely with family-focused digital influencers, amplifying their original posts both as part of official campaigns and in an opportunistic manner.

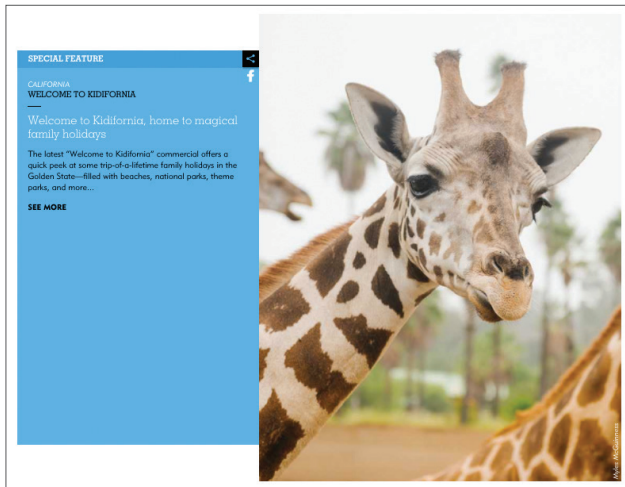


E-newsletter distribution

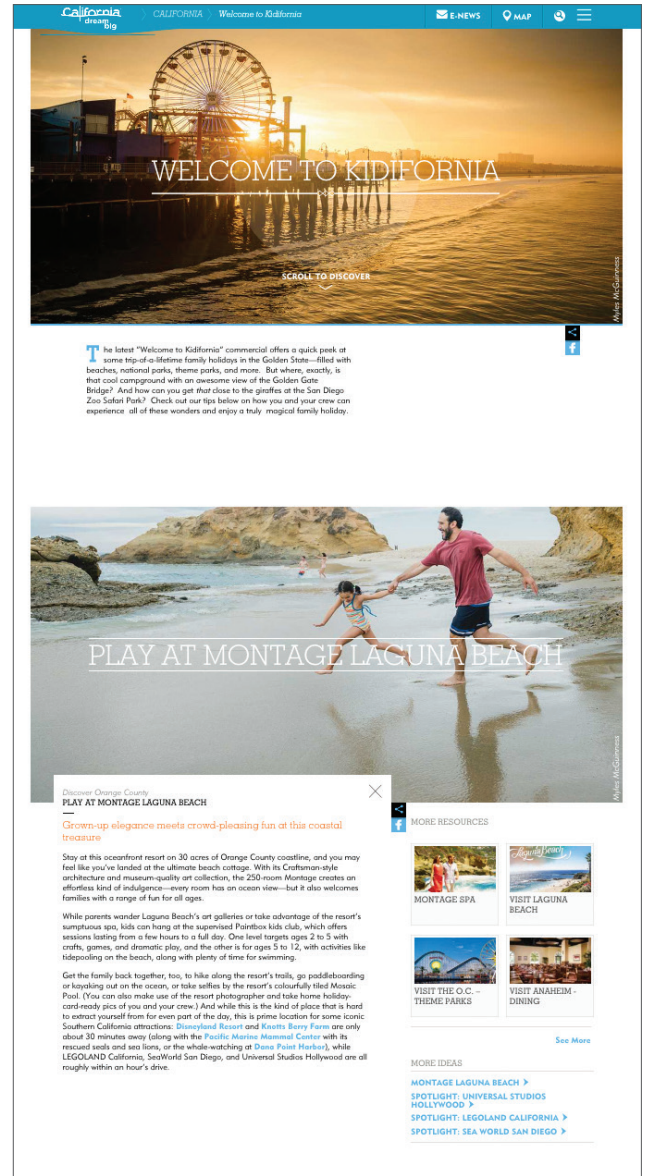
Visit California's e-newsletter program has proven to be an effective way to distribute family content and increase engagement with this demographic. Visit California sends ongoing e-newsletter communication to a general audience of 120,000 users, and family-centric content is always part of the content mix. Additionally, Visit California sends weekly family-focused emails to 10,000 highly targeted, highly engaged U.S. consumers. Open rate on these emails is 31 percent, with a click-through open rate of 22 percent — both far surpassing industry standards. Given the success of this targeted family email program, Visit California is taking steps to grow the family distribution list and build on these very strong results.

Kidifornia strategy

To support the Kidifornia initiative, Visit California has made key modifications to the family experience entry page to ensure that consumers seeking Kidifornia-themed content will find materials that lead them down the path to booking. For example, Kidifornia branding elements have been added to the family content mix on VisitCalifornia.com, enabling consumers to make an immediate connection between the paid media campaign and the owned channel. Additionally, Time Inc. researched, reported and created a 12-part special



feature that homes in on the 12 distinct locations showcased in the “Welcome to Kidifornia” TV spot. While the commercial is designed to pique consumers’ interest in visiting the Golden State, the VisitCalifornia.com feature provides the details necessary to plan a trip inspired by the ad. The internationally distributed article includes essential information on everything from the Montage in Laguna Beach to the San Diego Zoo Safari Park to Mammoth Mountain, with more than 100 industry links included.



A white-space analysis of the already-robust family content offerings on VisitCalifornia.com identified opportunities for new Kidifornia content. This analysis, enhanced by the aforementioned SEO analytics and Social Listening tool, led to the creation of multiple new articles serving the family target, including:

- *10 Travel Tips for Vacationing with Kids in California*
- *12 Free Activities for Families in California*
- *A Kid-Friendly Guide to California Road Trips*
- *California Edu-Tourism For Kids*
- *A Kid-Foodie's Guide to California*
- *California for Young Kids*
- *A Kids' Guide to Hollywood*

This content is designed specifically to show how California has been transformed into “Kidifornia.”

Visit California also will highlight some specific market activations through owned channels, such as Japan’s “Dream Kids” campaign. In addition, Visit California is actively looking to partner with kid-focused product companies, such as Little Passports, to extend the “California is now Kidifornia” message.

Kidifornia in e-newsletters

The Kidifornia-centric content listed above, along with previously existing content that resonates with the campaign, will be distributed via ongoing e-newsletter efforts. A Kidifornia-only email will be sent to the general audience list in February. Similar emails will go to international audiences as the Kidifornia campaign goes live in each region. Additionally, Kidifornia content and branding will be highlighted in the weekly family target e-newsletters distributed throughout 2017.

Kidifornia in social media

In keeping with the overarching Kidifornia strategy, Visit California will focus its social media content to show how California has been transformed into Kidifornia. At launch, Visit California designee will begin a two-week family content takeover of Facebook by highlighting family-centric content and travel tips that targeting the family market. So as not to alienate the non-family portion of followers, this content will be highly curated and specifically chosen. “Welcome to Kidifornia” TV spot assets will be shaped into shareable GIFs to highlight the campaign and to encourage followers to share their own family-friendly travel photos.

To bring some additional excitement to this program, Visit California will engage in a “surprise and delight” campaign for this audience — surprising targeted fans and followers with specially branded Kidifornia merchandise.

Kidifornia in Publications

Visit California’s 2017 Road Trips guide will include a Kidifornia-inspired feature detailing family-friendly destinations in California and including tips for a great vacation experience. The 36-page publication has a circulation of 1 million and will be distributed with the June 2017 issue of Sunset magazine as well as through online fulfillment.

EARNED MEDIA CHANNELS

Visit California’s “always on” global earned media program will bolster and complement family-focused consumer marketing campaigns, co-op platforms and trade initiatives while expanding the reach of direct-to-consumer storytelling through editorial placements and engagement with prominent digital influencers in the family space.

The public relations strategy will focus on securing placements across broadcast, online and print media channels and engaging those digital influencers to reinforce California’s position as the ultimate family playground. Ultimately, the global media relations program will showcase California’s abundance of family activities — reaching beyond the well-known attractions — and deepen the connection with the Mommy Maximus through a combination of global initiatives and country-specific program activities. Visit California’s global PR team will also serve as a resource by sharing relevant news and customized pitches to key media; creating and producing content and assets; and supporting press trips for traditional and online family media and influencers.

Influencers

Earned media is critical to Visit California’s success in communicating California’s family product through rich editorial content, with an emphasis on collaboration with digital influencers. The role of influencers has increased in recent years along with consumer demand for authenticity. Research shows that trust in well-known online personalities has increased over the last year, while trust in journalism has decreased (2016 Edelman Trust Barometer). While editorial can provide the trusted “seal of approval” consumers seek when they are deciding where to go

and what to buy, consumers develop deep connections with the digital influencers they follow. Consumer audiences engage with authentic influencer content because they share a passion for the destination or experience. That content is then shared and socialized. Visit California's partnerships with influencers will provide a two-way street for consumer engagement, building loyalty and trust.

Mommy Maximus is constantly connected to social media, actively looking for the best ways to make memories with her family while on vacation. With so many family travel decision-makers — and decision-influencers, including kids — spending time online, digital influencers are often the first source they connect with to find travel inspiration. Personal recommendations from friends and family, social media sites, “mommy blogs” and Twitter chats are all valuable tactics for reaching the Mommy Maximus. They want to know what's new; what's hot; and how they can get the most bang for their buck and maximize their family's time together.

Media targets

Though Mommy Maximus is always connected online, traditional earned media still has a role in influencing family travel decisions. Magazines targeting women or families (Parent, Family Traveller, Redbook, BB Mundo), morning and daytime television programs (NBC's Today, Breakfast Television) and daily and weekly newspapers (Sunday Times Travel Magazine, Toronto Star, Escape) still have strong readership and viewership. These programs and publications often include travel features that target families. Trusted editorial content provides an ongoing pipeline of what's new and exciting for travelers and, paired with digital media, influencers and brand collaborations, rounds out the earned media strategy.

The Pew Research Center studied parents' social media habits and found that 75 percent of parents use a social media log-on to find parenting-related information and social support from their network. Mothers, in particular, are 66 percent more likely to encounter helpful information on their social media platforms (Duggan Lenhart, Lampe & Ellison, 2015). There's no denying the impact of these channels on travel decisions.

Family influencers have become a media category in and of themselves. Influencers and blogger networks such as TravelingMom.com, Globetrotting Mama, Mamá Investigadora and Bindi & Bob Irwin have been incredibly successful carving out niches as voices of family travel. The most influential voices are authentic, inspirational, experiential, relatable and relevant. Many often have backgrounds as travel writers or even travel agents and use that knowledge

to help families get the most out of their trips. These opinion leaders can be found across all social media channels, with Instagram and YouTube being the most prominent. Facebook, Twitter, Snapchat and blogs also have a place in the media mix.

The authentic voice of a good influencer also opens the opportunity for strong partnerships, where the influencer can become a long-term ambassador for the brand, instead of offering a one-time partnership. In 2016, Visit California forged a strong relationship with influencer Lesley Carter of Bucket List Publications. Lesley has a large online presence through her blog network and the sincerity behind her love for California rings true with her followers. Though she has a national reach, Lesley lives in Southern California, making her the perfect partner for a road trip series. She and her daughter took six California road trips throughout the year exploring different regions of the state and highlighting family-friendly experiences along the way.



Earned media strategy

Visit California has defined the following guideposts and filters to focus earned media activity:

- **Trusted recommendations and reviews from social media** — Firsthand experiences and recommendations are of the utmost importance in the family market, and social media is the new water cooler. The financial and time investment in taking a family abroad can be significant, so proper planning is key. Many decisions are strongly influenced by online user-generated content from parenting bloggers and influencers. Engagement rates are also high with this audience, with parents far more willing to comment, interact and offer or seek out opinions than other market segments. Destinations willing to provide experiences, or even payment, in exchange for influencer coverage can gain traction in this space to become (or remain) top of mind.
- **Snackable, lighthearted content** — Whether the content lives online or in traditional media, it should aim to make the family travel planning experience a breeze. For example, the best content may offer tips to stretch budgets; create packing lists for a destination; or provide ideas for parenting while traveling. By creating earned media content that weaves in lighthearted storytelling with more pragmatic content, Mommy Maximus can easily visualize her family's immersive bonding experience while on vacation in California.
- **Quality time and memory-making through emotive content and imagery** — Regardless of family size or structure, bonding, playing and spending time together are all relationship-shaping experiences made possible by a family vacation. Telling the travel story through inspirational imagery is important in any market, but it is particularly important in the push for parents to book if they can picture their own children enjoying the same experiences. Travel, consumer and family publications capitalize on striking images of destinations, people and family travel products, often produced as original content from press trips.
- **Value of experience** — Price is a highly influential factor for a family when booking a destination. Working with media to convey the variety of options available in California, from the frugal to the affluent, can influence families across the budget spectrum. Working with destination and hotel partners to provide examples of authentic family experiences available only in California adds to the value proposition of booking travel to the state, making the trip, in essence, invaluable.
- **Only-in-California experiences** — In addition to a competitive price point, ease of access and family-friendly transportation/accommodations, parents are drawn to destinations that offer a cultural, educational or outdoor element. Pitching unique kid-friendly offerings, such as spending an afternoon at the California Academy of Sciences in San Francisco or bonding over surfing lessons in Huntington Beach, encourages a type of bonding experience more unique than simply visiting a zoo or lying on a beach. Following the centennial of the National Park Service in 2016, a trend toward national parks and the outdoors will continue into 2017, according to experts from the Family Travel Association, as reported in *U.S. News & World Report*. Tying into this trend, families seek vacations where they can “disconnect to reconnect” in nature, strategic positioning for the natural wonders of California.



Only-in-California experience spotlight: ski and snow

California offers travelers an array of family-friendly options during the winter season in areas across the state spreading along the Sierra Nevada from Lake Tahoe into Southern California. The Golden State's mountain resorts offer the ultimate winter destination for families seeking adventure, fun and relaxation. Many provide an assortment of activities, not just skiing or snowboarding, that leave the entire family happy and satisfied. Most California resorts have a focus on the mountain experience for families, with many providing deals for kids and multi-generational travelers on accommodations, lift tickets, lessons and more. Destinations like Tahoe Donner have garnered national awards like "Best Family Friendly Ski Resort" for providing a casual, family-friendly atmosphere at a great value.

By targeting select media and influencers and organizing press trips, Visit California reaches parents seeking adventures that will make a family vacation memorable. Firsthand accounts from media and influencers provide the content and imagery to drive inspiration when it comes time to plan the next family getaway.

Program highlights

Promoting California as the ultimate family destination is now an entirely new objective. Visit California has already had great success in the earned media space creating content and opportunities across platforms for its destination partners to shine in front of family audiences.

Visit California sponsored a #KidsNTrips Twitter chat during summer 2016 to highlight the Golden State's experiences for family travel and family road trips. Facilitated by three digital influencers — Jen Leo (@jenleo), Colleen Lanin (@travelmamas) and Katie Wood Dillon (@lajollamom) — #KidsNTrips chats brought together Twitter users who share an interest in traveling with their children. The chat resulted in more than 32 million timeline deliveries, reached more than 3.3 million Twitter users and generated more than 4,500 tweets. These metrics surpass #KidsNTrips averages and demonstrate that California is a desirable destination for this key audience.



A global press tour highlighting entertainment experiences in Los Angeles and the Deserts brought 15 media members – both traditional journalists and digital influencers – from Canada, the United Kingdom, Australia, Brazil, Mexico and South Korea to experience the Wizarding World of Harry

Potter during its opening month at Universal Studios Hollywood. There was instantaneous and substantial coverage on social media including posts by Brazilian celebrity Bruna Viera to her more than 1.5 million followers, and on the Toronto Star and Elle Canada social channels. Press coverage included articles in the Toronto Star, El Universal and Revista Capricho immediately following the trip.

Australia

After two successful seasons of the Australian version of the reality talent show, “The Voice,” TV production company Shine Australia launched a spin-off series called “The Voice Kids.” To recognize the efforts of the six series finalists, Visit California Australia negotiated a promotional partnership to provide each finalist and their family a 10-day “Dream” California holiday in return for exposure across all of The Voice Kids’ platforms – TV, social and web. The prize was developed to support Visit California’s family pillar and included experiences from The Disneyland Resort, Universal Studios Hollywood and San Diego. This partnership resulted in a total PR value of nearly \$2.3 million.



China

To further showcase California as a world-class family travel destination, Visit California China worked with *Condé Nast Traveler* on a family-fun press trip visiting parts of Southern California. The team leveraged Chinese celebrity Lisa S., resulting in extensive coverage of California in the July 2016 family special. This editorial spread included a 15-page feature story, 10-page cover story and the cover image. The total PR value achieved equates to more than \$3.5 million.

Canada

Canadian blogger and parenting expert Carrie Anne Bado of EverythingMom.com traveled to California with her 10-year-old son in 2016, creating a series of blog posts, videos and social media content focused on traveling with a tween. The mother-son pair traveled along the coast exploring culinary, culture and outdoor adventure. The earned media results of this trip reached nearly 300,000 people through extensive social media coverage, including approximately 40 Instagram posts.





United Kingdom

Visit California United Kingdom has seen a lot of interest in California family experiences with strong results across print and social. Freelance broadcast journalist David Reilly took his family on a California road trip and documented the experience through video on both his blog and YouTube. Blogger Susanna Scott (@amodernmother) featured her experiences in Santa Cruz and Lake Tahoe on her blog and Instagram. In print, a Bay Area to High Sierra family road-trip was featured in a four-page story in Family Traveller; and Disneyland’s 60th anniversary, along with a greater Southern California family story, was featured in Independent Traveller.

Mexico

In Mexico, Visit California has worked very closely with TV show “Entre Viaje y Viaje” to highlight family experiences in California. A nationwide program highlighting travel destinations, “Entre Viaje y Viaje” reaches 4 million viewers per episode and has a PR value of \$250,000. Visit California has partnered with the program for several broadcasts, each including activities for kids and families to enjoy including the Academy of Sciences, The Disneyland Resort, The Japanese Garden, Alcatraz and skiing in North Lake Tahoe.

Kidifornia strategy

Looking ahead, Visit California’s global earned media team is implementing programs to amplify the family campaign as a whole, with an emphasis on the launch of Kidifornia in Tier 1 markets.

Programs include:

- Media announcements about the Kidifornia campaign through the words of a child. Press releases for Canadian and U.S. markets will have a humorous “kid-written” approach. A template release with the same theme will be provided to destination partners to further amplify the message.
- A consumer activation in New York City in March 2017 will celebrate the launch of Kidifornia with the creation of a massive sand sculpture representing California icons in a high-traffic location. The high-impact activation will be pitched to national morning shows for on-location broadcasting.
- Domestic influencers will be immersed in Kidifornia through a digital influencer press trip (four parent-child influencer teams) through Southern California, while traditional journalists will be invited on kid-friendly road trips throughout the Central and Northern parts of the state.
- International media and influencers from Canada, the United Kingdom, Australia and Mexico will participate in individual press trips focusing on family adventures to support the Kidifornia campaign.
- Visit California United Kingdom will work with celebrity married couple Louise and Jamie Redknapp and their two children for a family travel piece on the premier U.K. breakfast show “This Morning,” which has 1.2 million viewers per episode.
- Further taking into account the importance of social media in the family travel planning process, Visit California will hold a family travel Twitter chat again this year with emphasis on continuing the conversation throughout the campaign.
- In Canada, media outreach will leverage Canadian public holiday Family Day in February to pitch trade and consumer travel journalists and digital influencers.



Dream Kids

Outside of Kidifornia, Visit California is targeting the Japanese family traveler through an integrated paid, owned and earned media and trade campaign called “Dream Kids.” The program, in partnership with major brands like Subaru, JCB and GoPro, will position California as the first choice for new, less-structured family travel where families can Dream Big. A familiarization trip in February 2017 brought a diverse group of traditional media and digital influencers and their kids to California to cover theme parks, outdoor activities, museums and more. Content and images generated from this trip will continue to be used through trade channels to help families book their dream vacations to California.

“Summer family travel is a segment with considerable demand but we have not focused on it until this year. We see ‘Dream Kids’ as a chance to introduce a new product and open up a new market for our company. But since we are new at it, just promoting in our retail agencies won’t be enough. That’s why we appreciate the chance to showcase our new products online and the incentive giveaways offered by Visit California. We also hope to learn more about family activities around California not limited to just the peak summer season.”

– Kana Nohara, Kinki Nippon
Tourist Individual Tour Co. Ltd – Japan

TRAVEL TRADE CHANNELS

The family market is an attractive segment for the travel trade. With school holidays and breaks providing regular and consistent travel periods, airlines, tour operators and travel agencies are able to package attractive family offers and can capitalize on the volume of families traveling.

Short flight times, favorable weather and relative familiarity top the list of wants for the family traveler. Short transfers, all-inclusive resorts and on-site kids clubs are also major factors in the decision-making process for younger families — and many return to the same hotel year after year. As their children grow however, so does the parents’ appetite for new experiences and adventures. As families graduate from short-haul holidays, North America is often on the top of their lists. The language, attractions, food options and weather draw first-time long-haul travelers in the thousands, but not without significant planning and advice from the travel trade.

The recent trend of multi-generational family travel has also expanded the need for expert advice on planning trips, as fulfilling the needs of all family members is no easy task when trying to provide convenience and coordinate schedules. There is often the added element of introducing an enriching experience for not only the children, but all members of the multi-generational traveling party.

“We have seen growth in this market traveling to USA as a result of the year-round affordable airfares and increased seat availability from Australia. Hotels and resorts with family-friendly amenities like kids clubs, kids menus in the on-site restaurants or apartment- or suite-style rooms with kitchenettes are the biggest sellers. Location is also a big factor — ease of getting to and from attractions and accommodations is important.”

– Lisa Monk, Infinity Holidays – Australia

The importance of the travel trade

Parents traveling long haul with children for the first time are naturally risk-averse and therefore put significant value on the advice and protection offered by large and reputable tour operators and travel agents. Travelers also want to know that they're getting the most value possible in terms of time and budget. As far as the family market is concerned, the role of the travel trade is one of security and expertise.

Given the breadth of experiences offered by destinations and the significant distances among key attractions, the skill and influence from the travel trade is focused more around building itineraries than selling theme park tickets. Whether tailor-making a 14-night holiday or developing an off-the-shelf fly-and-drive package that takes in the key family attractions across the state, it's about knowing what product is suitable for families and how it fits into a wider itinerary.

“...it starts with the airfares, getting from the airport to the hotel with ease, don't move around too much — stay in the one spot for a generous amount of time so the kids become a little more comfortable with their surroundings, and package it with a hotel that has the important facilities for the entire family, a restaurant, fridge, easy transportation and things for the kids to do whilst having some down time, e.g. pool, playground. The best way is to create a package that covers the number of nights away, makes the most of the bonus offers and represents great value to the customer.”

— Michelle Radnidge, Helloworld — Australia

Competition

In Europe, Latin America and Eastern Canada, Orlando will always control the vast majority of family holidays in the United States. Major tour operators have invested heavily in exclusive and differentiated product in these destinations, making them commercial priorities.

For Australia and the Asia markets, Japan in particular, the key competition is Hawaii. Many families regularly visit Hawaii because it is perceived as easy to get to and has less of a language barrier (as many people speak Japanese in Hawaii). Large communities of Japanese families visit during the peak summer months. The downside of Hawaii for Japanese visitors is that it is too familiar for some families and lacks variety in the types of activities children can do.

Cruising is also very popular, in particular for Canadian families, with the Caribbean and Mexico as the top cruise destinations.

“Travel landscape in Canada is very robust. We have a lot of clients looking for warm family vacations with many families travelling south in the winter every year with Florida and the Caribbean as the most common destinations. We love the diversity a California vacation offers for families. The famous beaches, iconic theme parks, relaxed west coast feel and the incredible moderate climate with continuous sunshine make California a can't-miss vacation.”

— Ryan Starkweather, Owner of The Mouse and Duck Travel Company — Canada

Family Vacation Planning Insights 2017

	Australia
When are school breaks/holidays?	Four school holiday breaks per year, one each school term. Break 1: March/April (Easter) — 2 weeks; Break 2: June/July (mid year) — 2 weeks; Break 3: Sept/Oct (Spring Break); Break 4: Dec/Jan (Christmas/Summer) — 6 weeks
Average length of holiday/vacation travel	22.6 nights
What are the most important factors for families when booking travel?	According to some of our key family operators, California families are seeking: <ol style="list-style-type: none"> 1. Value for money and extras like hotels with breakfast included, interconnecting rooms, properties with amenities such as fridges, roll away beds and family offerings eg: kids clubs 2. Only-in-CA / ultimate family experiences: icons, attractions and theme parks. 3. Convenience & ease: compact diversity
Which ways do families tend to book long-haul overseas travel?	Planning timeframe: up to six months. Booking timeframe: two to four months. Planning and booking process has become increasingly fragmented. Flights vs land booked across a variety of traditional and online sources. Roughly 50% of visitors book their trip through traditional travel agency/tour operator. Remainder go direct through OTAs. More than 15 trade companies include California in their packages.
What is the typical make up of families that travel on long-haul trips ?	According to the 2011 census, there were 5,584,000 families in Australia. The types of families consisted of couples with dependent children (36.7%) and one-parent families with dependent children (10.6%). Most couple families have children living at home (54%), and amongst these families, the most common family size was four people, two adults and two children. In families with two dependent children, most families (52%) had a girl and a boy, while 25% had two boys and 23% had two girls. The median age of the eldest child was nine, and the median age of the younger child was six.
What are popular destinations for families to travel in North America?	California (LA, Anaheim, San Francisco, San Diego), U.S. National Parks, Florida (Orlando), Hawaii (Honolulu)
What are popular destinations for families to travel globally?	United States, New Zealand, Queensland (Australia), Fiji, South East Asia
What is the average spend on travel for families?	Australian visitors to California during 2015 reported spending \$169 per day during a 9.5 night average stay or approximately \$1,602 per visitor. The average spending for all overseas visitors to California was about \$1,979 (Source: U.S. Dept. of Commerce, National Travel and Tourism Office, "Survey of International Air Travelers")

Family Vacation Planning Insights 2017

Canada	Mexico
<p>Break 1: March/Spring or Easter — 1 week; 2: Christmas — 2 weeks; 3: Summer — 2 months, July and August</p>	<p>Break 1: Easter Holidays, April 10–21; 2: Summer, July 17–Aug. 11; 3: Winter, last two weeks of December</p>
5–7 days	5 days
<p>Families are most often booking travel based on interest (37%), activities offered for both parents and children (26%), family-friendly quality (23%), value/budget restraints (22%), and overall distance from home (6%). <i>(Family Travel Trends, Gutsy Traveler, TravelGuard)</i> For the multigenerational travelers, the most important attributes in a destination are beautiful scenery, “a place I have never visited before,” a beach experience, an opportunity to eat different and unusual cuisines. The most appealing outdoor activities are hiking, biking and outdoor adventure, snorkeling or scuba diving, water sports, white water rafting/kayaking. <i>(Preferred Hotels, Multigenerational White Paper)</i></p>	<p>Affordability, Security, Diversity of family oriented attractions, Accessibility</p>
<p>For Canadians planning outbound trips, 46% intend to use a travel agent to book their trip, and travelers are more likely to use a travel agent for longer trips to Europe or Asia than for trips within Canada or the US. The most commonly used websites for researching and booking destinations include Expedia.ca, Travelocity.ca, iTravel2000, Selloffvacations.ca and Flightcentre. <i>(Multi-generational travel: The new top travel trend, Blue Cross Canada)</i></p>	<p>Mexican families when planning long-haul travel, usually use travel agencies services (60%). The booking timeframe average is 2 months. The most frequently OTAs used are: Best Day, Price Travel and Expedia</p>
<p>Family Travel is typically made up of children aged 11-14 years of age (43.9% of family travelers), followed by 7-10 (36.5%) and only 10% included tends above 14, and less than 10% for kids six and under. <i>(Travel Trends 2017, Kathy Buckworth, What She Said Radio)</i> Multi-generational vacations now represent half of all vacations taken by both grandparents and parents. While the party consisted of grandparents, parents and their children on 44% of such trips, on the remaining 56% the definition of multigenerational groups has expanded to include siblings (31%), nephews/nieces (20%), and friends (20%). <i>(Multi-generational Travel, Blue Cross Canada)</i></p>	<p>The types of families in Mexico are integrated as follows: 26% Dad, Mom and Children, 15% Mom, Dad and youths, 10% Partner, children and other relatives, 11% Stepfamily, 4% Young Couples without children, 19% Mom or Dad alone with children, 15% Other (Same sex partner, co-residents, etc)</p>
<p>Florida (Orlando, Ft. Lauderdale, Miami, Tampa, Ft. Myers), California (San Francisco, Los Angeles, San Diego), New York (NYC), and Hawaii (Honolulu) <i>(Market Profile, Brand USA)</i></p>	<p>California (Los Angeles, Anaheim, San Diego), Orlando, Miami, San Antonio</p>
<p>Caribbean/Central America; London, U.K.; Paris, France; Seoul, South Korea; Tokyo, Japan; Honolulu, Hawaii <i>(2016: Canada's Travel Year in Review, Kayak Travel Hacker Blog)</i></p>	<p>United States, Canada, Caribbean, South America, Europe</p>
<p>\$4,072– 40% of Canadians households are looking to spend less than \$2,499 and 35% of households are looking to spend \$2,500–\$4,999 on their next International trip. <i>(Market Profile, Brand USA)</i></p>	<p>Mexican families regularly travel for pleasure once or twice a year, spending between \$650 and \$1,100 each (\$1,300–\$2,200 per year)</p>

Family Vacation Planning Insights 2017

	United Kingdom
When are School Breaks/Holidays?	Break 1: October Half term — last week in January; 2: Christmas holidays — two weeks from pre-Christmas to early January; 3: February half term — last week in February; 4. Easter — two weeks (a week either side of Easter weekend, two weeks either side for private schools); 5. Summer — last week in July through first week in September
Average length of holiday/vacation travel	10 days
What are the most important factors for families when booking travel?	<p>Families booking travel from the U.K. are definitely interested in value. Not necessarily a low, low price but value added items such as free breakfasts, parking, Wi-Fi and resort credit.</p> <p>For most, family holidays are about the opportunity to spend time away from their busy lives reconnecting and enjoying time together. This could be through 'family fun' at a theme park, 'family outdoor' in a national park/on a beach or 'family education' learning about the Gold Rush or visiting attractions such as the California Academy of Sciences.</p> <p>Families tend to favor resort-style hotels with interconnecting rooms and casual dining options. Games rooms, day care and kids clubs are a hit, resort fees are not.</p>
Which ways do families tend to book long-haul overseas travel?	Over 80% of families book long haul holidays through a traditional travel agent or tour operator. The relative unfamiliarity of a long haul destination combined with the higher average booking value means customers (particularly risk-averse families) prefer the security of booking with ATOL protection — something they wouldn't get from dynamically packaging their own holiday.
What is the typical make up of families that travel on long-haul trips ?	Due to its proximity, the majority of families with babies, infants and even small children tend to opt for European destinations. Shorter flight times would be the single biggest contributing factor and we would expect most of these to be 2 adults and 2 children. As the children grow into their teens they will generally look further a field. The global trend for multigenerational travel is also prevalent in the U.K., where according to the Telegraph 18% of the population have been on holiday with three generations.
What are popular destinations for families to travel in North America?	Florida (Orlando) and California (San Francisco, Yosemite, Los Angeles & San Diego)
What are popular destinations for families to travel globally?	Mediterranean (Greece, Spain, Canary Islands, Cyprus, Algarve, France), Florida, Caribbean & California
What is the average spend on travel for families?	According to various reports U.K. families spend on average around \$2,500 per year on travel, although it should be noted that this number will be heavily skewed by the proportionately higher volume of budget short haul holidays available in this market.

Challenges

Despite all of the incredible attractions and experiences available on the ground in California, there are a few key challenges that must be considered:

Accessibility

With flying times of up to 10 hours (and sometimes more), and a destination almost the size of France, less-adventurous families may perceive California as too much of a challenge with children. Depending on the market, countries that have less than five hours flying time are included in the competitor set strictly due to lower travel times.

Affordability

Despite the emergence of low-cost carriers such as Norwegian Air, which offers a low-cost option for accessing the west coast from Europe, California remains a relatively expensive destination. The cost of accommodation in San Francisco is second only to New York in the United States, and along with the Middle East and Australia is one of the most expensive leisure destinations in the world. California is actually more affordable than Hawaii as a whole and boasts many activities that are free or nearly so, but Hawaii has many tour operators that price holiday packages that are inclusive of air and accommodations.

Because most family travel happens during peak periods that are aligned with school holidays, prices tend to be higher than shoulder seasons. Families with a higher disposable household income and previous experience visiting the United States may consider California alongside other destinations including South Africa and Canada.

Product

The value and availability of accommodations combined with a huge number of attractions has made Orlando a one-stop shop for many families looking to travel long haul for the first time, especially in markets such as the United Kingdom. Staying in all-inclusive properties has become a hugely popular way of controlling costs on a family holiday — not just in Mexico and the Caribbean but also in the Mediterranean. All-inclusive vacations and cruising are extremely popular for Canadians across the country and are often very affordable vacation options for families.

Travel trade strategy

Visit California's travel trade strategies for the family target include:

1. Communicating the California family product offering for the mainstream audience worldwide, with a focus on Australia, Canada, Japan, Mexico and the United Kingdom.
2. Building deep relationships with those who can create and develop family packages, with an emphasis on family experiences that include California attractions, icons and activities.
3. Evaluating existing trade partner relationships to engage in additional trade promotional activities and extensions surrounding Kidifornia.

Kidifornia strategies

Visit California's global offices are working with the international trade and developing plans that will amplify the Kidifornia messaging through trade channels and spotlight family travel throughout California.

Programs include:

- Partnership with Family Travel Association, a new coalition of leading family travel suppliers, resources and experts coming together to create a single, collective voice on behalf of the travel industry and those companies serving traveling families.
- Global familiarization trips where trade across all international markets will visit California to participate in itineraries that showcase the state's unique and most popular family offerings.
- In partnership with Qantas and Helloworld, Visit California will develop flight and ground packages that offer fantastic value for California family holidays. Packages will represent a diversity of family-friendly destinations and experiences. These will vary in length of stay but at a minimum include three destinations.
- Partner with Air Canada to align Kidifornia with the Altitude Skyriders Kids Program, which allows kids to get a logbook to keep track of their flights, a unique luggage tag, special stickers and the opportunity to earn all kinds of Air Canada Altitude Skyriders™ goodies.
- Air Canada co-op with focus on family will include marketing activities to drive sales and inspire families to choose California as their vacation destination, potentially with expanded partnerships with Air Canada Vacations or Carlson Wagonlit.
- Visit California Japan will promote family travel to California under the banner of Dream Kids. The objective is to encourage families to explore and visit California's family-friendly destinations, including theme parks, national/state parks and activities around the state. Dream Kids is a multi-channel promotion that will include creation of new tour product to California geared to families; media coverage directed at families in digital, print and broadcast media; a dedicated social media channel; small- and large-scale consumer events; and promotion/advertising through Visit California-owned and partner digital channels. The program also will feature California industry partners and consumer products companies in a variety of sectors.



Global

California STAR

The new California STAR trade engagement program, which focuses on agent education and serves as a sales companion, launched in early 2017 and includes a section on family travel for California. The program will continually be expanded with additional content to better showcase California's diverse family offerings. This family content reaches the current database of 25,000 agents globally as well as new agents being acquired daily.



APPENDIX

Family Media Target List		
Traditional Media		
Market	Outlet	Circulation
U.S.	ABC Family	N/A
U.S.	AKA Mom Magazine	200,000
U.S.	All You	1,564,430
U.S.	Amazon Prime	N/A
U.S.	American Baby	2,004,648
U.S.	Arizona Parenting	70,000
U.S.	Atlanta Parent	99,900
U.S.	Better Your Life	50,000
U.S.	Blackish — ABC Studios	N/A
U.S.	Boston Parent	58,431
U.S.	Brooklyn Parent Magazine	50,000
U.S.	Chicago Parent	95,477
U.S.	DallasChild	64,614
U.S.	DaytimeTV	N/A
U.S.	Disney Channel	N/A
U.S.	Diversity Woman	100,000
U.S.	Family	501,542
U.S.	Family Circle	3,972,940
U.S.	Family Living	150,000
U.S.	Family Magazine	502,185
U.S.	Family Time	65,000
U.S.	Family Times Magazine	57,150
U.S.	FamilyFun	2,119,045
U.S.	First for Women	989,032
U.S.	Fit Pregnancy and Baby	2,000,000
U.S.	Georgia Family Magazine	55,000
U.S.	Good Housekeeping	4,345,870
U.S.	Good Morning America — ABC News Network	5,242,000

Family Media Target List (continued)

Traditional Media

Market	Outlet	Circulation
U.S.	Home & Garden Television (HGTV)	N/A
U.S.	HomeLife	132,227
U.S.	Hulu	N/A
U.S.	Ladies' Home Journal	3,205,302
U.S.	Lifetime TV	N/A
U.S.	Modern Family — ABC/20th Century Fox Television	N/A
U.S.	Nickelodeon/Nick at Nite	N/A
U.S.	O, The Oprah Magazine	2,381,900
U.S.	OWN: Oprah Winfrey Network	N/A
U.S.	Oxygen	N/A
U.S.	Parents	2,217,318
U.S.	Parents Latina	700,000
U.S.	Prevention	1,539,872
U.S.	Real Simple	1,988,525
U.S.	Redbook	2,222,115
U.S.	Scholastic Parent & Child	1,312,878
U.S.	Seattle's Child	80,000
U.S.	SELF	1,490,012
U.S.	Shape Magazine	1,630,901
U.S.	Telemundo	N/A
U.S.	The Chew - ABC Network	N/A
U.S.	The Ellen DeGeneres Show	N/A
U.S.	The Meredith Viera Show	N/A
U.S.	The Steve Harvey Show	N/A
U.S.	TLC	N/A
U.S.	Today — NBC News Network	4,741,000
U.S.	Travel Channel	N/A
U.S.	Travel Mamas	106,829

Family Media Target List

Traditional Media

Market	Outlet	Circulation
U.S.	Univision	N/A
U.S.	Washington Family Magazine	65,937
U.S.	Washington Parent	75,000
U.S.	Woman's Day	3,272,720
U.S.	Working Mother	100,000
U.K.	National Geographic Traveller Family	N/A
U.K.	Family Traveller	N/A
U.K.	Smallish	N/A
U.K.	First News	N/A
U.K.	Sainsbury's Magazine	N/A
U.K.	Sunday Times Travel Magazine	N/A
U.K.	Junior	N/A
U.K.	Families Online	N/A
U.K.	Loved by Parents	N/A
U.K.	Mummy Pages	N/A
U.K.	Nappy Valley Net	N/A
CAN	BC Parent	N/A
CAN	Breakfast Television	N/A
CAN	Canadian Family	N/A
CAN	Canadian Living	N/A
CAN	Cityline	N/A
CAN	City Parent	N/A
CAN	enRoute Magazine	N/A
CAN	Globe and Mail	N/A
CAN	Metro News	N/A
CAN	Parents Canada	N/A
CAN	The Social	N/A
CAN	Today's Parent	N/A

Family Media Target List (continued)

Traditional Media

Market	Outlet	Circulation
CAN	Toronto Star	N/A
CAN	Vancouver Sun	N/A
CAN	WestJet Magazine	N/A
CAN	Your Morning	N/A
AUS	Escape	4,700,000 (print and digital)
AUS	kidspot.com.au	2,099,000
AUS	Holidays With Kids	600,000
AUS	Fairfax Traveller	2,721,000 (print and digital)
AUS	Mamamia	4,000,000

Bloggers/Digital Influencers

Market	Outlet	Social Media Following
U.S.	Adventure Mom (Nedra Mcdaniel)	73,850
U.S.	Classy Mommy (Colleen Padilla)	176,648
U.S.	Colorado Mountain Mom (Tami Mittan)	54,967
U.S.	Daily Mom (Danielle Agnew)	58,556
U.S.	Family FocU.S. Blog (Scarlet Paolicchi)	418,192
U.S.	Family Travel Magazine (Jodi Grundig)	102,909
U.S.	Flashpacker Family Travel Blog Travel with Kids (Bethaney Davis)	29,205
U.S.	Have Sippy Will Travel (Samantha Fuess)	235,468
U.S.	It's a Lovely Life (Heather Reese)	446,886
U.S.	Kids are a Trip (Kirsten Maxwell)	73,033
U.S.	La Jolla Mom (Katie Dillon)	202,184
U.S.	Lady and the Blog (Vera Sweeney)	154,662
U.S.	Luxury Travel Mom (Kim-Marie Evans)	76,201
U.S.	Momfluentia (Ciaran Blumenfeld)	75,683
U.S.	Mommy Poppins (Anna Fader)	403,357
U.S.	Mommy Shorts (Ilana Wiles)	398,123

Bloggers/Digital Influencers		
Market	Outlet	Social Media Following
U.S.	Mommy Travels (Meagan Wristen)	69,274
U.S.	Solo Mom Takes Flight (Sarah Pittard)	68,783
U.S.	Stuffed Suitcase (Kimberly Tate)	123,252
U.S.	Travel Mamas (Colleen Lanin)	144,739
U.S.	Travel Savvy Mom (Jamie Pearson)	69,006
U.S.	TravelingMom (Maria Smith, Mimi Slawoff and Kim Orlando)	182,937
U.S.	Trekaroo (Marisa Langford)	230,770
U.K.	Sorry About the Mess (Chloe Bridge)	4,003
U.K.	A Modern Mother (Susanna Scott)	28,643
U.K.	Mrs Meldrum (Rebecca Meldrum)	37,526
U.K.	Britmums	82,561
U.K.	Mummy Travels (Cathy Winston)	6,928
U.K.	Mini Travellers (Karen Beddow)	31,424
U.K.	My Travel Monkey (Ting Dalton)	13,596
U.K.	Suitcases and Sandcastles (Clare Thomson)	3,709
U.K.	A Mummy Too (Emily Leary)	51,569
CAN	Life in Pleasantville (Candace Derickx)	37,241
CAN	EverythingMom (Carrie-Anne Badov)	97,704
CAN	YummyMummy (Erica Ehm)	104,467
CAN	Globetrotting Mama (Heather Greenwood Davis)	13,966
CAN	Sand in My Suitcase (Jody Robbins)	11,277
CAN	Listen2Lena (Lena Almeida)	39,781
CAN	Je Suis Une Maman (Jaime Damak)	45,947
CAN	Maman pour la vie (Mariane Chenail)	300,029
AUS	Instagram: @pixiecurtis (Pixie Curtis)	111,634
AUS	Instagram: @bindisueirwin (Bindi and Bob Irwin)	1,300,000
AUS	Instagram: @joelmadden (Joel Madden)	584,000

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