

Brand sentiment research

Objective

Visit California commissioned ORC to conduct brand perception research to address questions around the impact of the current political environment on potential travel to California.

Study details

The survey was conducted in May 2017 — and included 1,000 respondents in Visit California's five international Tier 1 markets: Canada, Mexico, China, United Kingdom and Australia.

Questions asked in the survey mirrored those used in research by Brand USA and Discover Los Angeles to allow for comparison of data across destinations. The survey will be periodically administered to track trends over time. The following results constitute the baseline survey.

Key takeaways

- International travel is still a key priority for Visit California's Tier 1 markets, with nearly three-quarters of adults (73%) 18-54 surveyed indicating they are likely to travel internationally in the next 12 months.
- California is still in the consideration set for consumers surveyed, with nearly 90% of respondents saying they are likely to visit California "at some point" in their lives.
- Differences arise in the timing of these visits:
 - * In the next two years: China (73%) and Mexico (68%) are likely to travel, while less than half in Canada (43%), Australia (37%) and the United Kingdom (36%) are likely to travel.
 - * California is considered an especially welcoming destination in the U.S., with the majority of respondents (56%) agreeing California is much more or somewhat more welcoming than the rest of the USA as a whole.
- * This perception is highest amongst consumers in Mexico (69%) and China (65%).
- * The current political climate in the U.S. makes it less likely for 32% of respondents to visit California on holiday.
- * The influence is greatest in North America, where about 1 in 5 Canadian (18%) and Mexican (22%) consumers indicate they are significantly less likely to visit.
- * The same is true for only about 1 in 10 Australians (13%) and Britons (8%), and less than 5% of Chinese (3%).
- Among respondents not likely to travel to California in the next two years, there are a variety of obstacles. Top reasons vary by market including:
 - * Wanting to visit other countries first (Australia – 34%)
 - * Wanting to save money for a trip (United Kingdom – 29%)
 - * It's a big trip I want to plan well in advance (China – 54%)
 - * Unfavorable exchange rate (Canada – 42%)
 - * The influence of the political climate (Mexico – 33 %)

California Brand Perception Research

ORC conducted brand perception research in May 2017 for Visit California to address questions around the impact of the current political environment on potential travel to California. Survey questions were asked of 1,000 respondents in Visit California's five international Tier 1 markets (Canada, Mexico, China, the United Kingdom and Australia).



73%

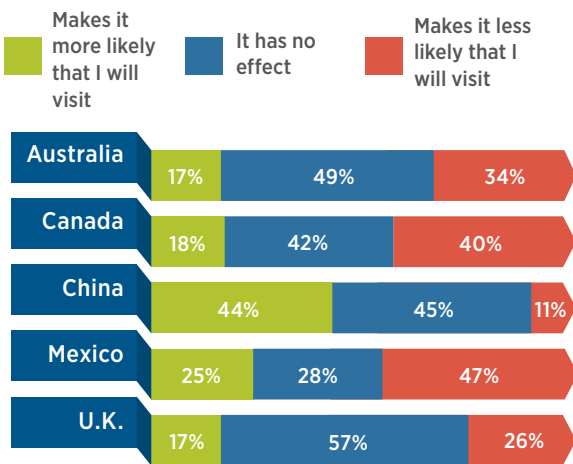
of those surveyed say they are likely to travel internationally in the next 12 months



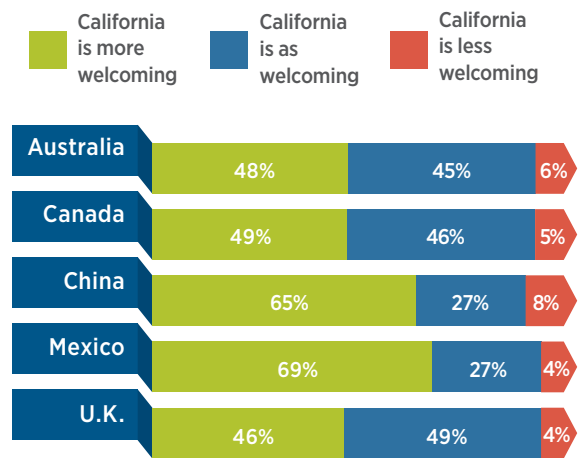
90%

say they are likely to visit California "at some point" in their lives

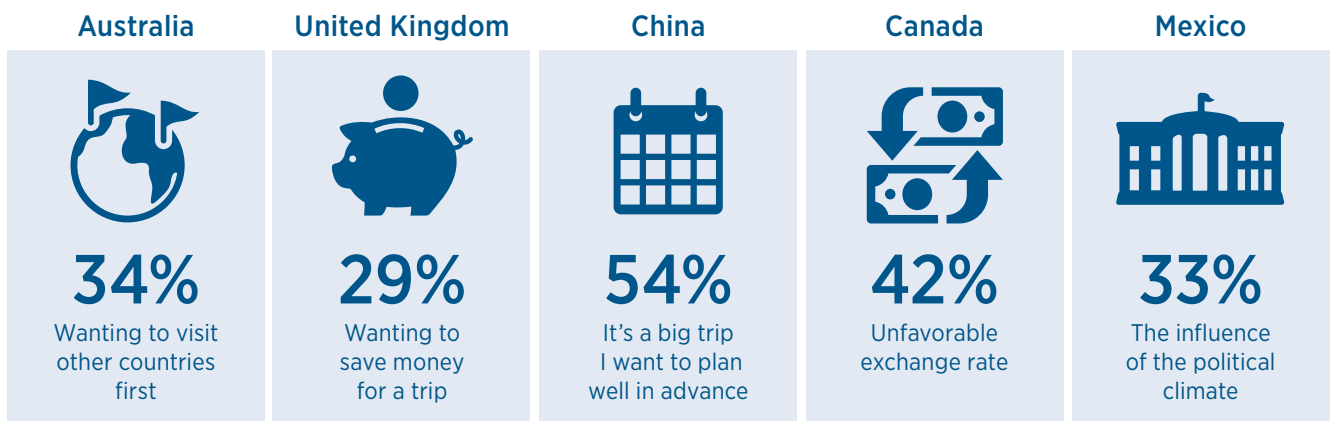
How much influence does the current political climate in the U.S. have on your likelihood to visit California for a holiday?



Based on what you know or have seen, read or heard, how would you compare California to the rest of the U.S. as a whole?



Among the respondents not likely to travel to California, top reasons include



Source: ORC International