



'What If California' RESEARCH TO SUPPORT CAMPAIGN

With the launch of Visit California's What If campaign, California provides inspiration by leaning into the power of possibility. There is no doubt that this is the right time for Visit California to return to the national advertising stage. From the major progress on the public health crisis to a surge in optimistic consumer sentiment and enthusiasm for travel, the country is ready for travel inspiration.

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California's improving public health indicators, including declining case numbers, hospitalizations, and deaths, combined with the vaccination rollout is allowing the state to re-open for business, including many travel-related businesses.

- Weekly new COVID-19 case numbers have declined each week since early January. For the week ending March 7th, there were 26K cases diagnosed in California, about 1/10th of the cases diagnosed at the peak of the surge during the week ending December 20th. (Source: CDC)
- With three vaccines now available, 18.5% of the state's residents had received 1 or more vaccine doses as of March 7th, slightly ahead of the rate of the U.S. population overall. California's focus on frontline workers and equity in vaccine distribution ensure that all communities in the state will have equal access to the vaccine supply. (Source: CDC)
- At least 24 counties have now moved to a less restrictive COVID-regulation tier and many more are re-opening indoor services at restaurants and businesses in a limited capacity. More counties are expected to be eligible to loosen COVID-related restrictions in the coming weeks. (Source: CDPH)
- On March 5th the state announced that theme parks and live events, including live sports and performance, will be able to resume operation in a limited capacity on April 1st.

Consumer sentiment regarding the pandemic and more critically travel is increasingly positive. This rising tide of optimism is starting to impact behaviors like travel planning.

- For the first time since the start of the pandemic, a majority of U.S. consumers believe the coronavirus situation will get better in the next 3 months. (Source: Destination Analysts)
- Along with optimism about the state of the pandemic, perceptions regarding the safety of travel activities are changing. The average rating of "unsafe/very unsafe" across 20+ travel activities is now at the lowest rate since the start of the tracking, continuing to decline. (Source: Destination Analysts)



- With increased optimism regarding the course of the pandemic and lowering perceptions of risk, consumers are feeling more excited about the idea of travel. Nearly three-quarters of consumers have already started some sort of planning for travel in 2021. (Source: Destination Analysts)
- Resident sentiment is also trending positive both to participate in helping the local economy and to welcome back visitors. In fact, 44% of Californians would be very happy/happy to see an ad promoting their destination. (Source: SMARInsights)

Visit California marketing has always elevated the California image, reinforcing those truths about the California Dream. The program is now more critical than ever to shaping perceptions of the state of California.

- Visit California research found that the state took a hit in 2020 finding clear evidence of brand tarnish. There are several potential culprits- wildfires, politics, and COVID cases- and it's likely all three had an impact. With the negative media narrative, some of the core truths that Americans believe about California started to diminish. (Source: SMARInsights)
- Visit California marketing is proven to lift the perceptions of the state among those exposed to the advertising. Consumers who recalled Visit California marketing in 2020 had a nearly 50% lift in agreeing with three key elements of the California Dream: California is full of possibilities; California's abundance provides endless experiences; and California is a place that inspires you to try new things. If it wasn't for this lift in perception, the fall in brand image would have been even greater. (Source: SMARInsights)
- There is significant synergy generated from exposure to multiple campaign layers. Consumers exposed to 5+ campaigns spend double that of consumers not exposed and 19% more than consumers exposed to only one layer.
- Many of California's competitive destinations have not closed down or paused marketing programs during the pandemic as California did to manage the health crisis. Florida is one such example and Visit California research shows that it is a top-of-mind destination for many future travelers. And Florida's travel economy has recovered quickly. By the end of 2020, California had recovered just 49% of our Domestic airlift. By comparison, Florida had recovered 70%. (Source: Diiio)
- Visit California research on advertising which included Focus Group reactions to the What If ad concept found that despite sensitivity and preferences shown in reactions to Visit California content earlier in the summer and early fall, consumers now are eager for travel ads that inspire them to dream about future possibilities, and they express a desire to NOT have such advertising include face masks. (Source: SMARInsights)