

**California**  
dream  
big

# 2016 Mexico Awareness Wave

June 2016



# Media Buy

- Visit California invested nearly \$2 million in the Mexican market, with the budget almost equally divided between TV and digital.
- Digital components of the campaign were significantly expanded since the prior effort in 2014 and resulted in a doubling of the overall spend. The digital in Mexico was also concentrated in the Come True campaign, while in other countries multiple digital efforts were deployed.

TV	Spending	Impressions
Dreamers Mexico Revise	\$1,083,566	98,235,587
Digital		
Foundational "Come True"	\$885,754	993,203,690

Media	2014	2016
TV	\$767,222	\$1,083,566
Digital	\$222,778	\$885,754
<b>Total</b>	<b>\$990,000</b>	<b>\$1,969,320</b>

# Image, Position & Planning

# Top-of-Mind Awareness

**Top-of-Mind Awareness (TOMA):**  
Unaided recall of destinations



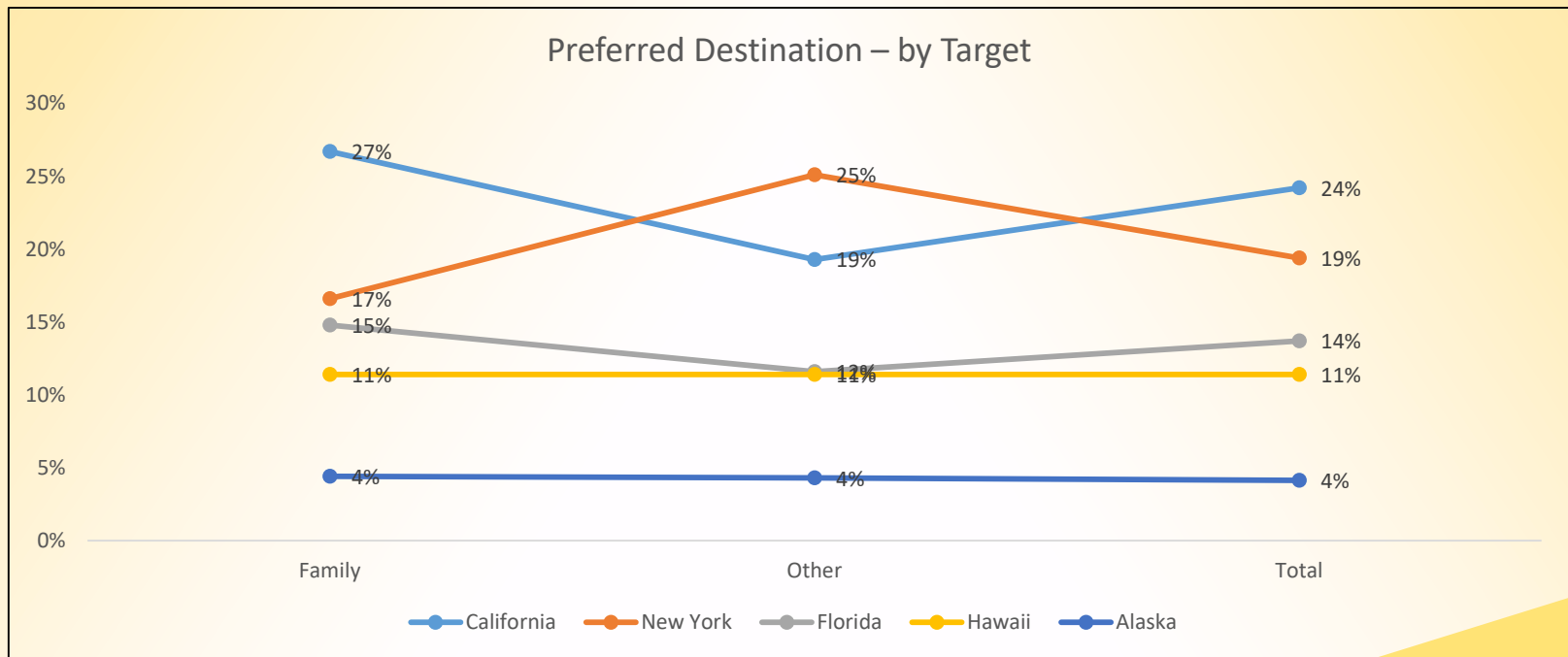
**TOMA – Overall**

- California Total (74%)**
  - New York (53%)
  - Florida Total (45%)
  - Los Angeles (36%)**
  - California (33%)**
  - Las Vegas (29%)
  - Miami (23%)
  - Texas (18%)
  - San Francisco (18%)**
  - Texas Destination (17%)
  - Chicago (16%)
  - Florida (14%)
  - Orlando (14%)
  - Washington (11%)
  - San Diego (10%)**
  - California Destination (7%)**

Target Top-of-Mind Awareness	Family	Other
California Total	74%	74%
New York	52%	55%
Florida Total	47%	41%
Los Angeles	36%	37%
California	35%	30%
Las Vegas	30%	26%
Miami	23%	22%
Texas	18%	19%
San Francisco	16%	21%
Texas Destination	15%	20%
Chicago	15%	19%
Florida	15%	12%
Orlando	15%	13%
Washington	10%	13%
San Diego	10%	11%
California Destination	8%	6%

# Destination Preference

- California is the preferred destination overall.
- California's position as the preferred destination is strong with the Family segment; however, those without children prefer New York over California.



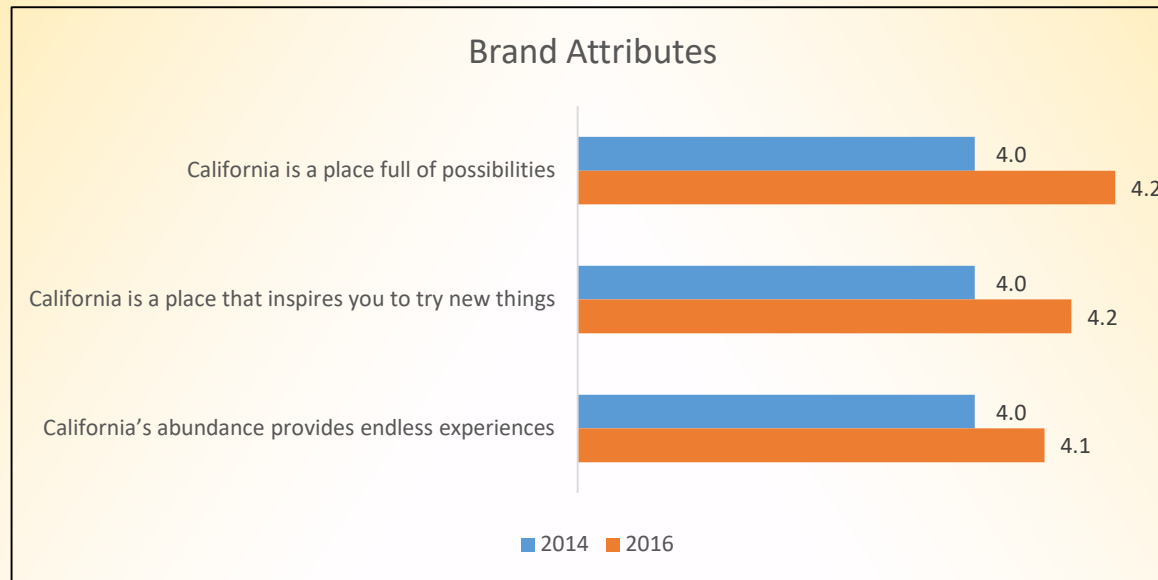
# Brand Index

- Overall, Disney and Google lead the choices for a brand that “embodies a sense of creativity, an anything-is-possible attitude and inspires people to try new things.”
- California falls somewhat behind Las Vegas and Facebook for all groups.
- There are few differences for the Family target.

Families		Other		Overall	
Disney	100	Google	100	Disney	100
Google	99	Disney	99	Google	100
Facebook	95			Las Vegas	95
Las Vegas	95			Facebook	95
California	95	Las Vegas	94	California	94
Visa	94	Facebook	92	Visa	94
		Apple	92		
Apple	91	Visa	91	Apple	91
Florida	90	California	91	Florida	90
Aeromexico	89			Aeromexico	88
		Florida	88		
		Aeromexico	85		
Telcel	84			Telcel	83
El Palacio de Hierro	82	Telcel	80	El Palacio de Hierro	81
Modelo	82	El Palacio de Hierro	79	Modelo	81
		Modelo	78		
Atletica	74			Atletica	73
		Atletica	68		

# Brand Statement Trend

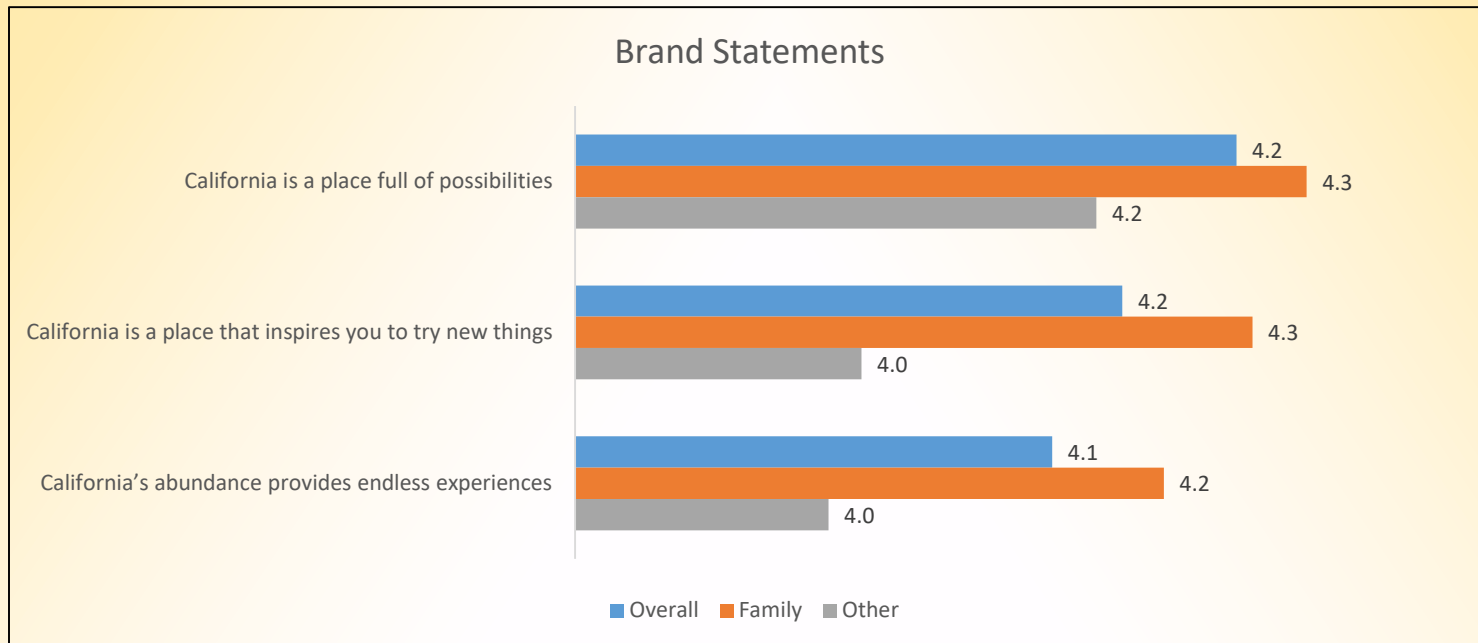
- VCA has made significant progress on building the brand in just the past three years in the Mexico market.





# Brand Statements

- With a better overall image of the state and preference for California, the Family target has the highest ratings for the brand statements.





# Product Statements

- The Family target has a better overall opinion of California's product on nearly every attribute, although overall the ratings are generally high and reflect perceptions of the abundance that California offers.

Top 2 box; California...	Overall	Family	Other
Has large cities with exciting urban experiences - nightlife, shopping & dining	83%	84%	81%
Is scenic and beautiful	81%	83%	78%
Is a place with lots to see and do	81%	81%	80%
Has a lot of family activities & theme parks	80%	83%	76%
Is culturally diverse	77%	79%	75%
Has many unique vacation experiences in one	77%	79%	72%
Has a variety of active outdoor activities - hiking/climbing/biking	74%	77%	69%
Has excellent beaches	74%	76%	69%
Has picturesque national and state parks	73%	76%	68%
Is a place where food & wine are part of the lifestyle	72%	74%	68%
Has great professional sporting events	70%	73%	65%
Offers laid-back luxury	69%	73%	61%
Is the ultimate family playground	68%	72%	59%
Provides a good value for the money	66%	71%	56%
Has interesting historical sites	64%	67%	58%
Has lakes for boating & fishing	62%	65%	56%
Has many quaint small towns	60%	62%	56%
Is a good place for snow sports	40%	45%	30%

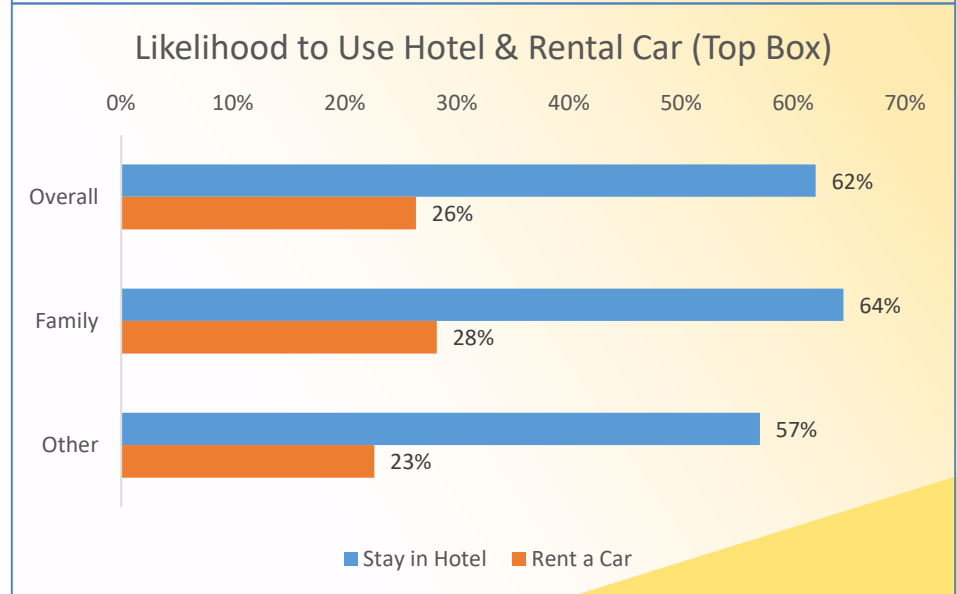
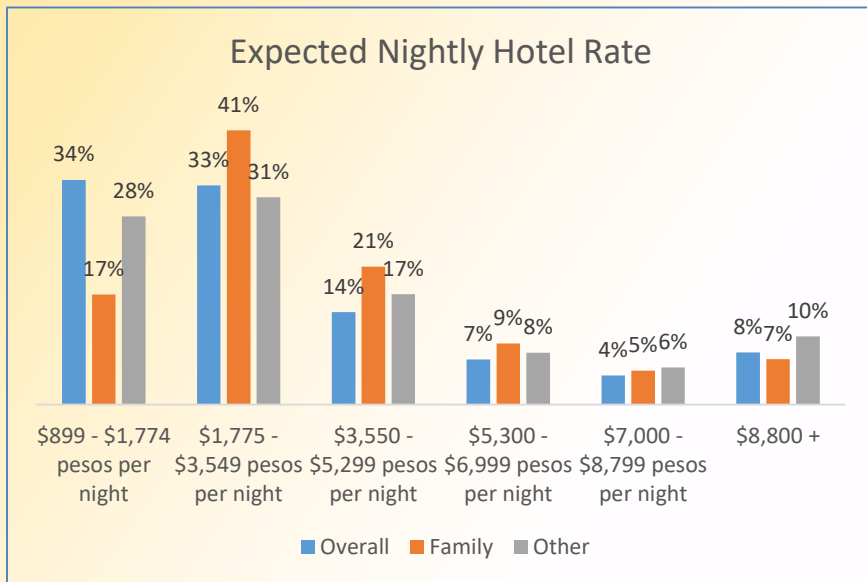
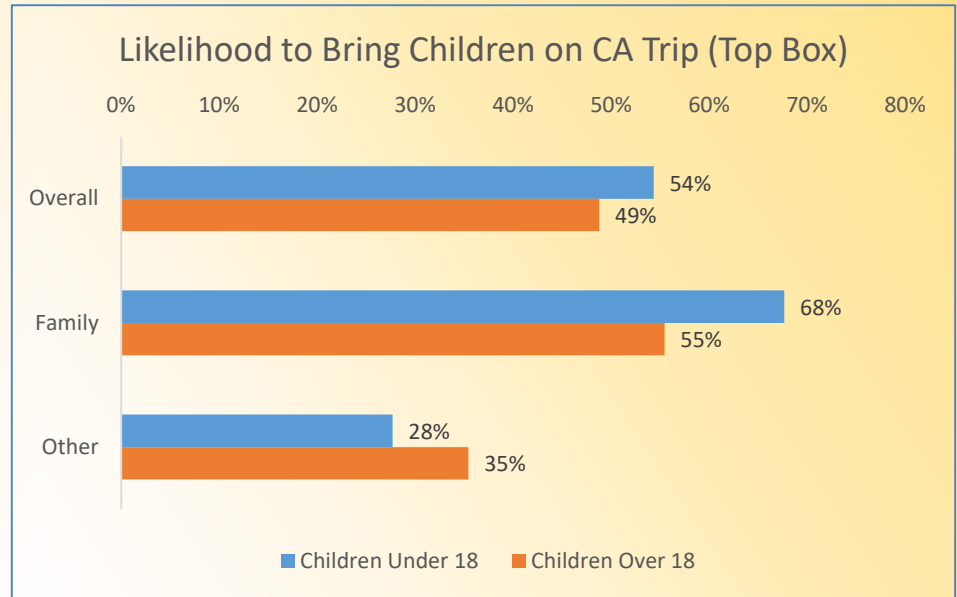
# Attitude/Emotional Statements

- California is clearly viewed as a place that inspires people to try new things and focused on innovation – while being fun and friendly.
- The Family target is also significantly more favorable about the state's culture on every attribute.

Top 2 box; Represents California's feeling, vibe or culture...	Overall	Family	Other
Fun and lively	83%	85%	81%
A place that inspires you to do new things	80%	82%	75%
A place that inspires innovation and new trends	78%	80%	75%
A place where music is a part of the lifestyle	77%	79%	73%
Welcoming and friendly	77%	80%	71%
A place where people live life to the fullest	76%	78%	71%
Free spirited and accepting	76%	78%	70%
A place where I can be myself	75%	79%	69%
Offers the best of everything in one place	75%	78%	68%
Has a unique and desirable lifestyle	75%	79%	66%
Youthful	72%	74%	69%
Casual and laid-back	71%	75%	63%
A place I feel safe and secure	68%	72%	60%
A place to indulge myself	68%	71%	62%
A place that doesn't take itself too seriously	51%	54%	45%

# Potential Visits

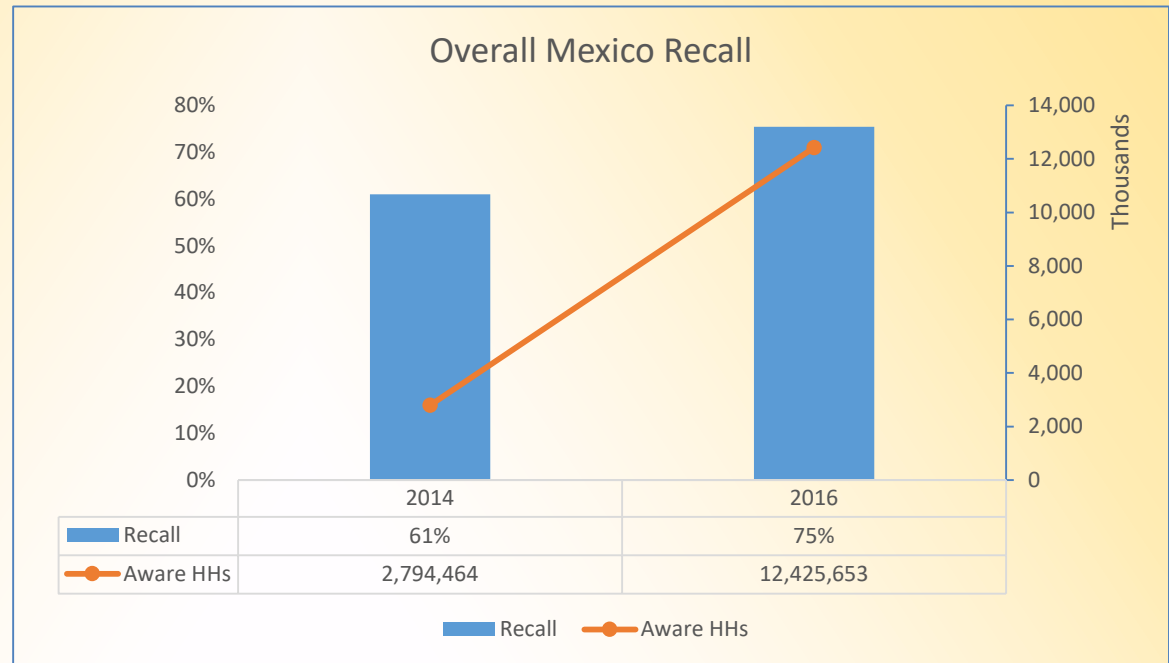
- More than half of Mexican visitors expect to be bringing children of all ages.
- Hotel use nears two-thirds, while car rentals are only anticipated by a quarter of those surveyed.
- The Family target is more likely to use a hotel and car and likely to spend more on lodging as well.



# Media Recall

# Overall Recall

- Broadening the campaign to the country as a whole resulted in a much larger household base.
- Coupled with doubling the media expenditure and higher awareness, this yielded exponential growth in aware households at a significantly lower per household cost.

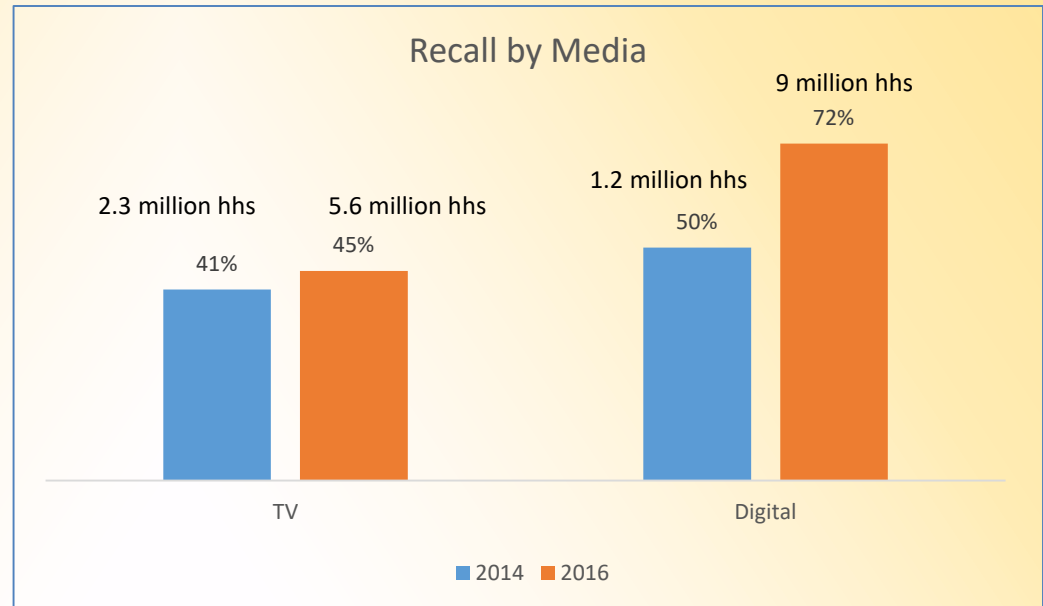


	2014	2106
Targeted Households	4,581,089	12,425,653
Awareness	61%	75%
Aware Households	2,794,464	9,368,942
Spending	\$963,358	\$1,969,320
Cost per HH	\$0.34	\$0.21

SMARInsights  
benchmark:  
\$0.48  
per aware  
household

# Recall by Media

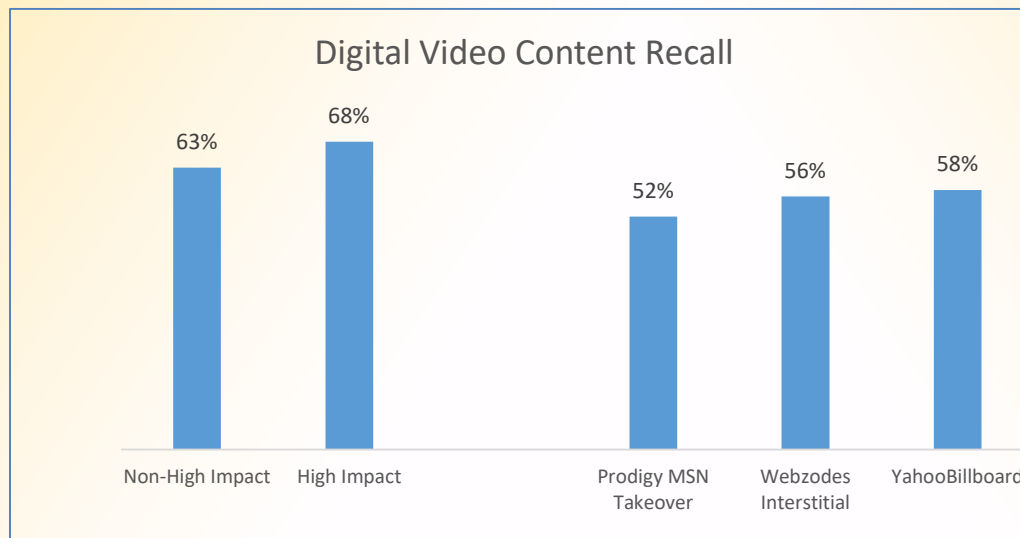
- While it looks like TV recall exhibited a modest increase in awareness, the actual number of aware households increased significantly with the move to a national buy.
- Digital, on the other hand, showed a dramatic increase in the recall percentage – and the actual reach of the campaign.



	TV	Digital
Recall	45%	72%
Hhs with Recall	5,641,247	8,983,747
Media Costs	\$1,083,566	\$885,754
Cost per Aware Household	\$0.19	\$0.10

# Digital Recall

- Total digital recall was significantly higher this year, and all elements of this campaign had strong reach.
- The Come True Foundational High Impact efforts had the strongest reach with a limited spend, resulting in an outstanding CPH.



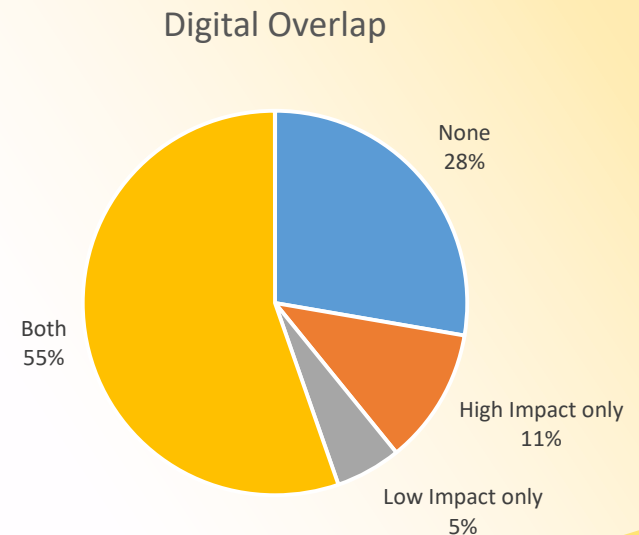
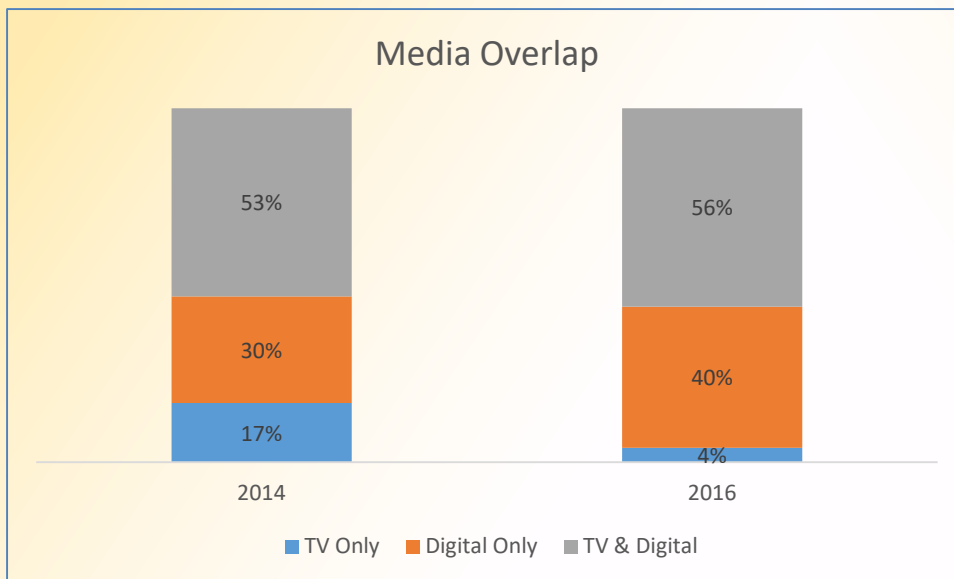
**High Impact  
CPH:  
\$0.02**

**Non-high  
Impact CPH:  
\$0.09**



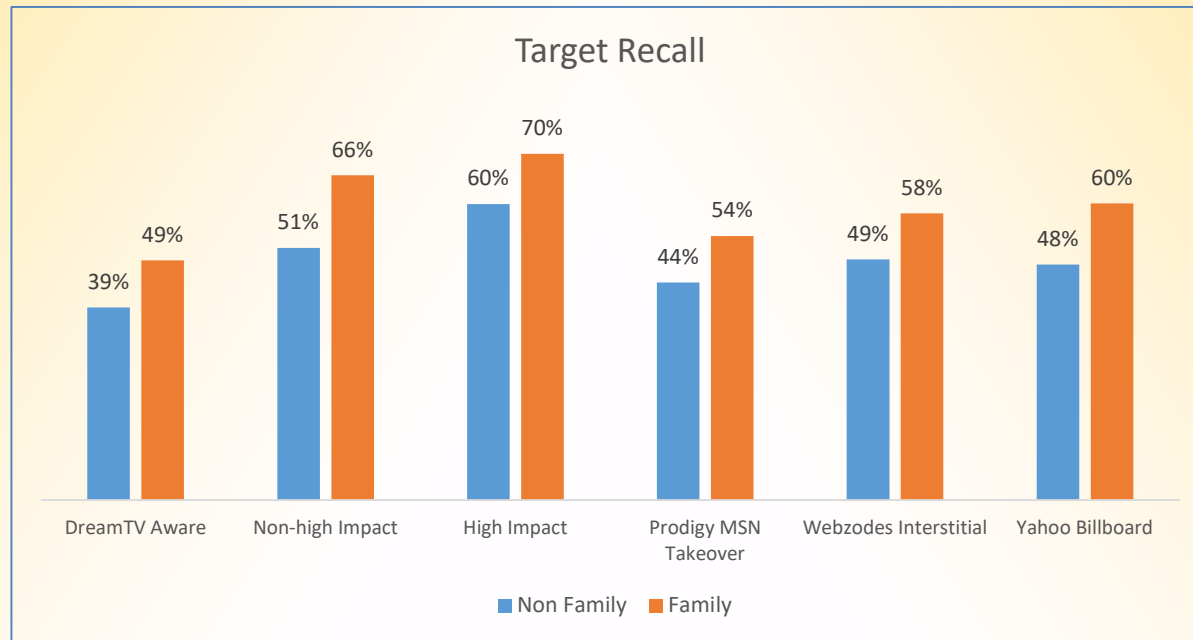
# Media Overlap

- The broad reach of digital resulted in strong overlap and a limited amount of TV-only households.
- And significant overlap was realized between the High and Non-high Impact digital.



# Recall by Demo Targets

- The Family target of households with children has significantly higher awareness of every asset tested.

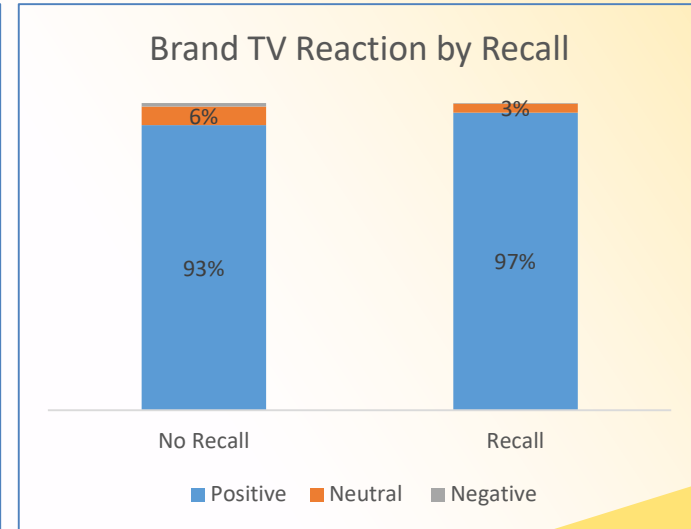
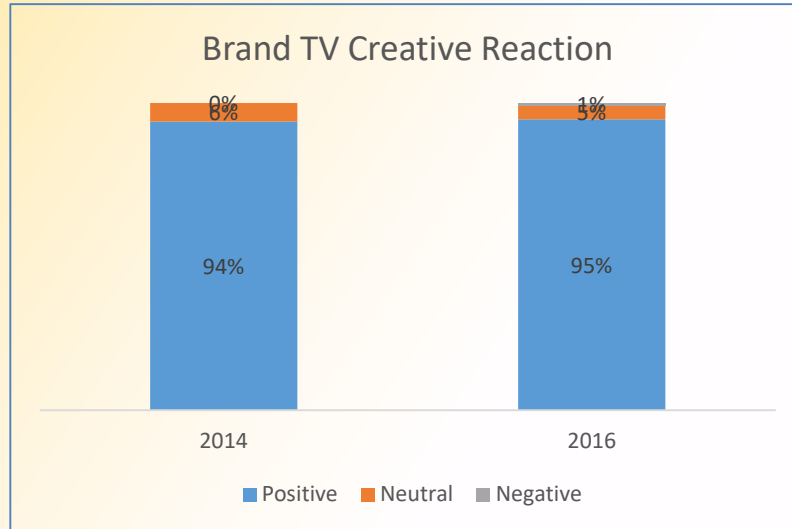


# Creative Ratings

# Brand TV Reaction

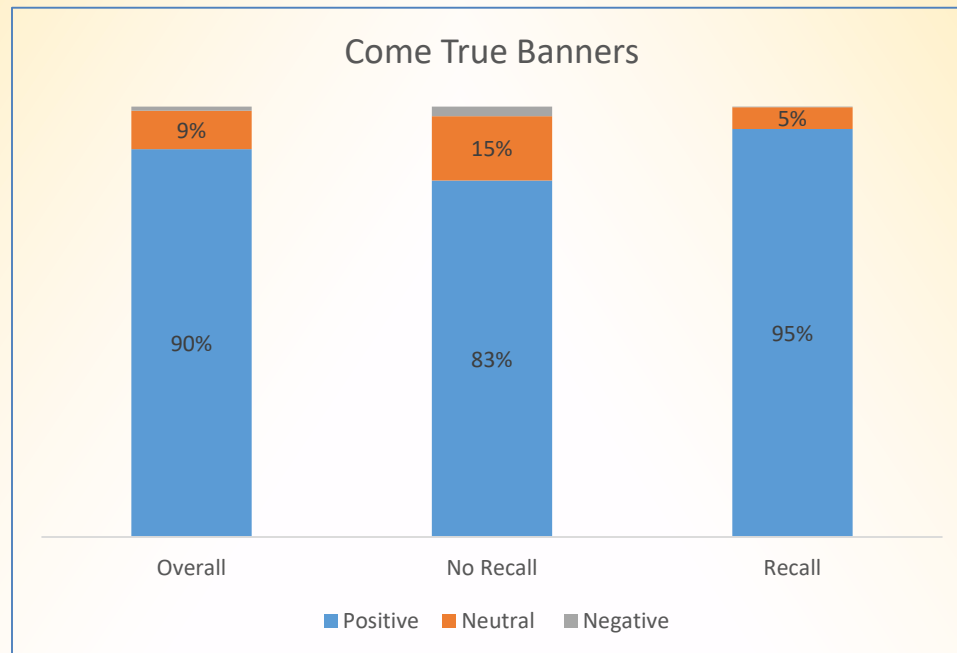
- The Dreamers Mexico Revise spot was extremely well received. Not only was there no negative reaction, but the spot impacted the core brand messages.

Change in Brand	Overall	Family	No TV Recall	TV Recall
California is a place full of possibilities	4.3	4.4	4.2	4.4
California is a place that inspires you to try new things	4.2	4.3	4.1	4.4
California's abundance provides endless experiences	4.2	4.3	4.1	4.3



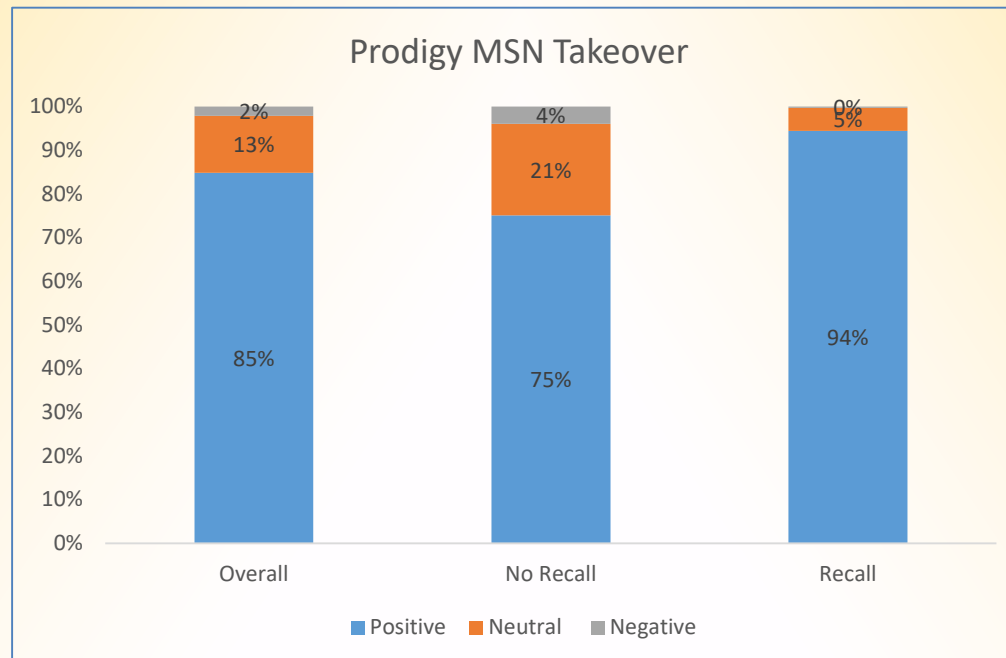
# Foundational Come True Reaction

- SMARInsights typically finds video-based creative receives a better reaction than other types of media. However, in this market the Come True banners were very well received.



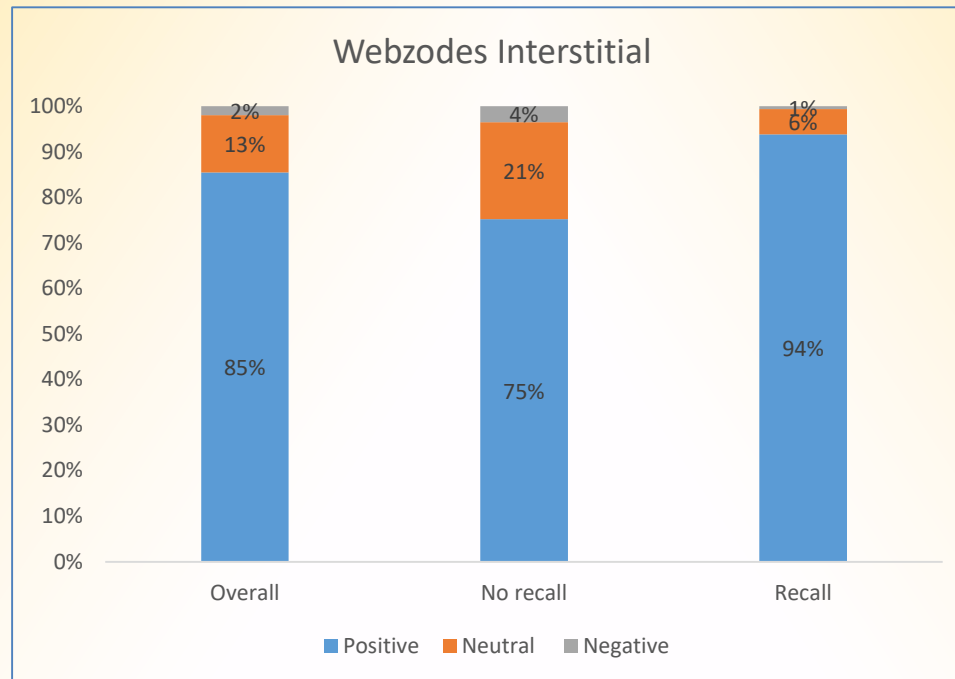
# Prodigy MSN Takeover

- While not nearly as positive, the High Impact takeover of Prodigy MSN still received essentially no negative reaction. The overwhelming majority reacted positively.



# Webzodes Interstitial

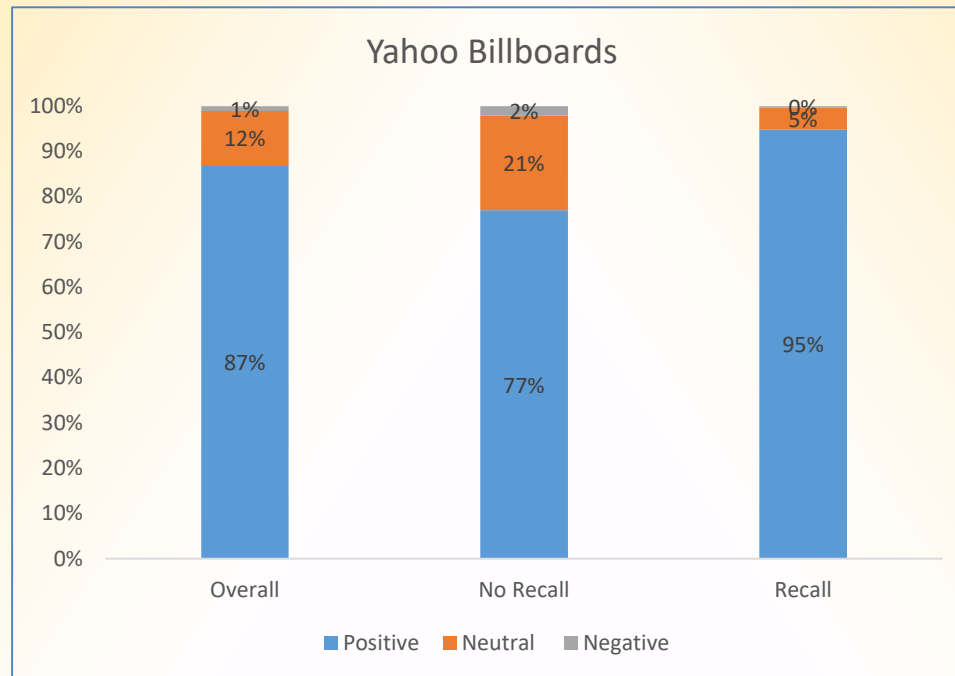
- A similar result was achieved with Webzodes Interstitial.





# Yahoo Billboards

- While among the least positively received, the positive reaction overall is still very strong, and this series of ads still elicited no negative reaction.



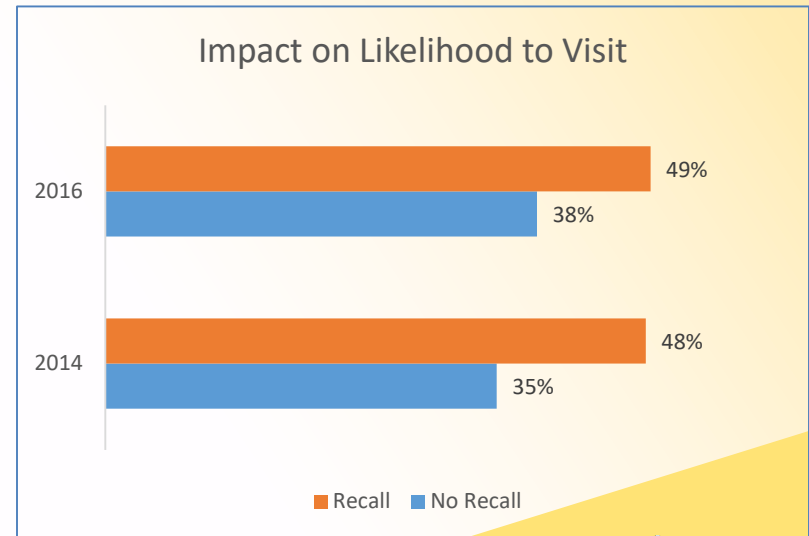
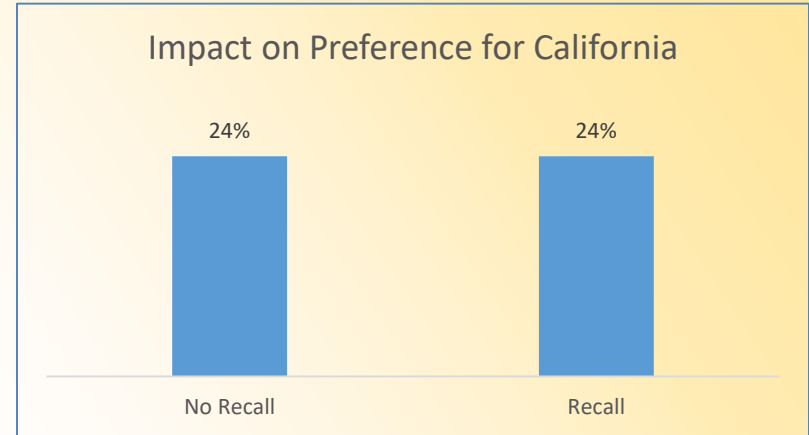
# Impact of the Marketing

# Overall Impact

- Recall of the media positively influences image, behavior, and intent. Although the potential increment is lower, in 2014 it was assessed with a 3-year window rather than 12 months. But the strong level of being the preferred destination remains unchanged.

Brand Attributes	No Recall	Recall	Diff.
California is a place full of possibilities	4.2	4.3	0.2
California is a place that inspires you to try new things	4.1	4.3	0.2
California's abundance provides endless experiences	4.1	4.2	0.1

Information Gathering	No Recall	Recall	Diff.
Ordered a visitor's guide	14%	27%	12%
Visited state website	49%	61%	13%
Called state tourism office by phone	8%	17%	9%
Visited state Facebook page	24%	40%	17%
Followed state on Twitter	4%	10%	7%
Gathered information using other method	27%	24%	-3%
Gathered any information	78%	93%	15%

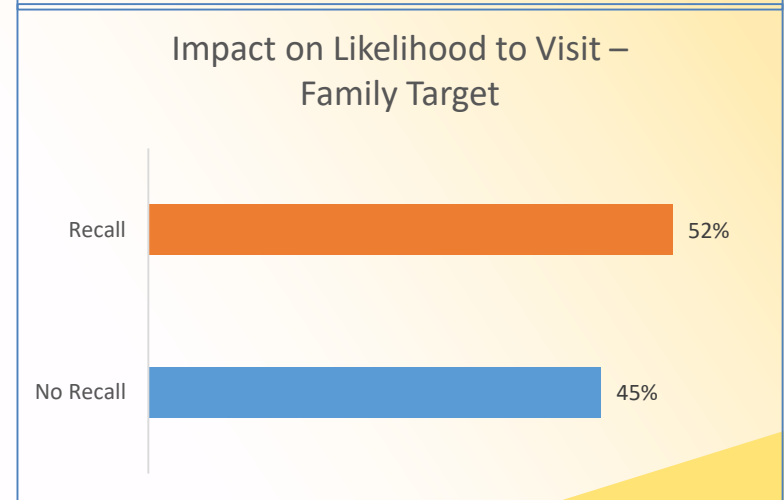
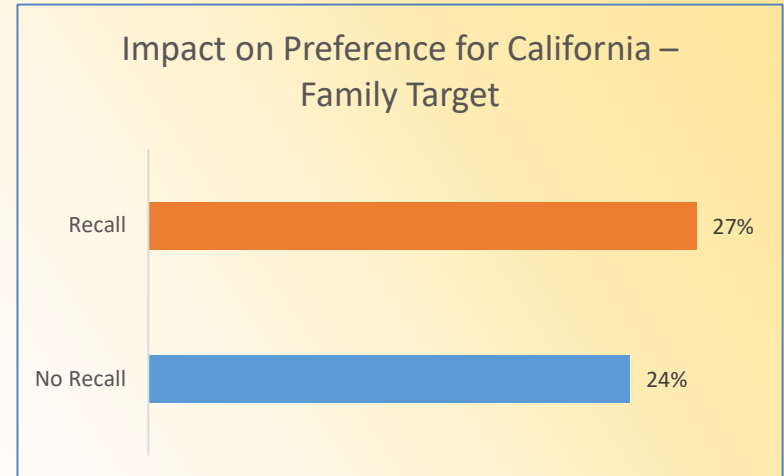


# Family Target Impact

- The Family target's image of California is more influenced by recall, and they are far more likely to have followed through with information gathering. The potential increment for this audience could also result in a significant number of trips given they make up two-thirds of the households.

Family Brand Attributes	No Recall	Recall	Diff.
California is a place full of possibilities	4.2	4.4	0.2
California is a place that inspires you to try new things	4.1	4.4	0.2
California's abundance provides endless experiences	4.1	4.3	0.2

Family Information Gathering	No Recall	Recall	Diff.
Ordered a visitor's guide	12%	29%	17%
Visited state website	48%	61%	13%
Called state tourism office by phone	9%	18%	9%
Visited state Facebook page	26%	43%	17%
Followed state on Twitter	5%	11%	7%
Gathered information using other method	27%	23%	-4%
Gathered any information	83%	95%	12%

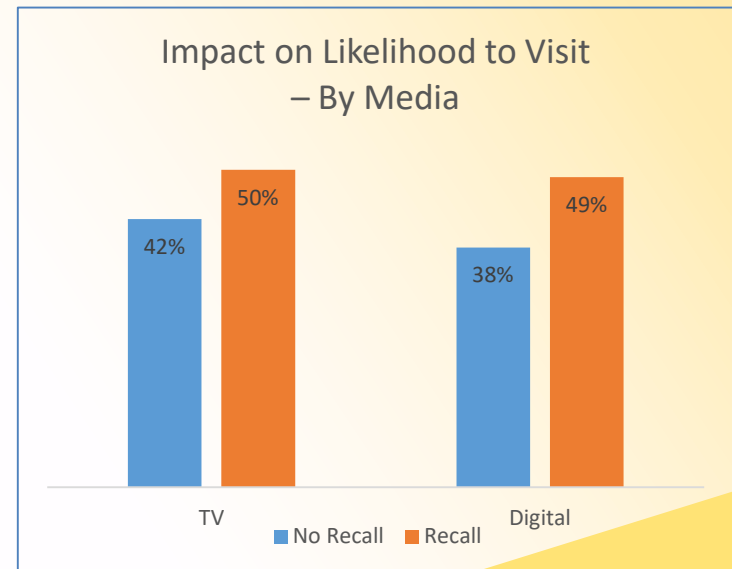
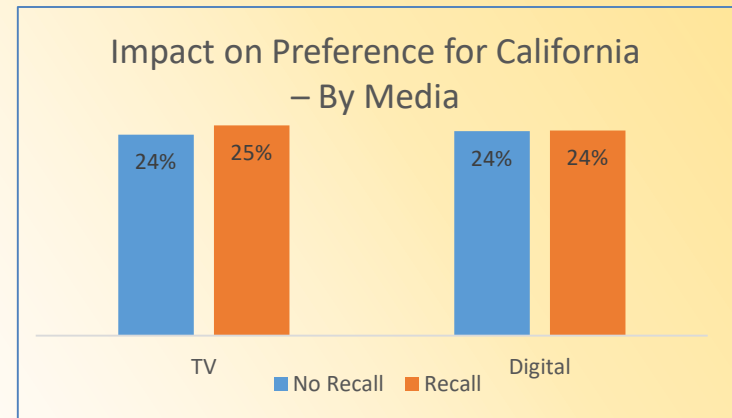


# Impact by Media

- Across markets, VCA has seen that while TV is able to reach a wide audience, synergy with other media has the strongest impacts. The impact of TV has been lessened in markets as California becomes more established.
- In the Mexican market, digital actually outperforms the impact of TV, perhaps as a function of their strong interest and role of digital in the decision-making process.
- The impact of digital is especially noteworthy in this market where the reach is also strong.

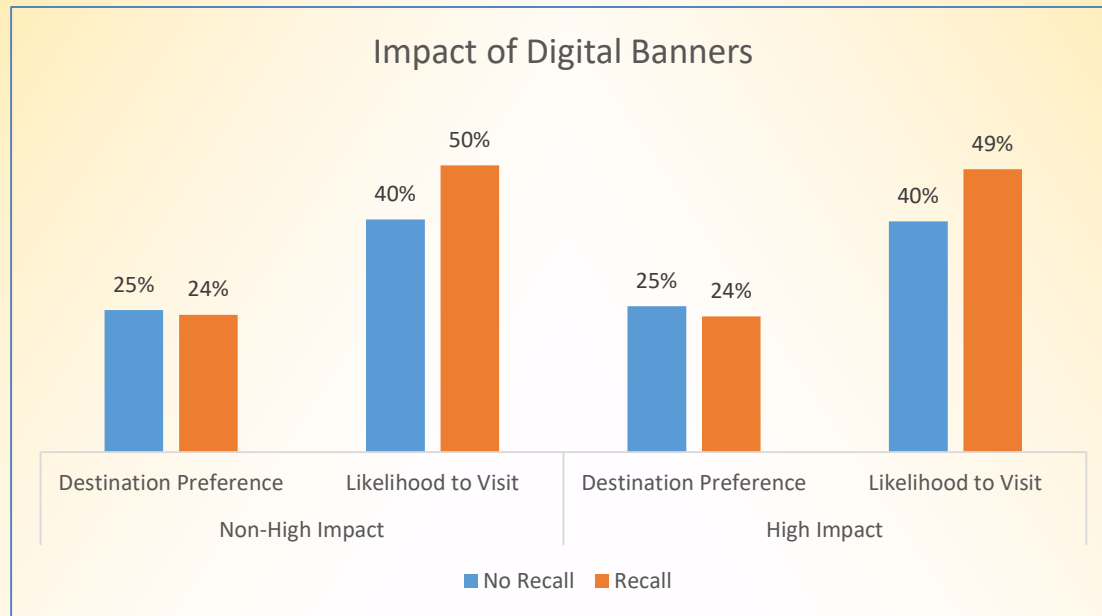
TV Impact on Brand Attributes	No Recall	Recall	Diff.
California is a place full of possibilities	4.2	4.4	0.2
California is a place that inspires you to try new things	4.1	4.4	0.3
California's abundance provides endless experiences	4.1	4.3	0.2

Digital Impact on Brand Attributes	No Recall	Recall	Diff.
California is a place full of possibilities	4.2	4.3	0.2
California is a place that inspires you to try new things	4.1	4.3	0.2
California's abundance provides endless experiences	4.0	4.2	0.2



# Foundational High Impact and Non-high Impact

- The High Impact banners have a greater impact on the brand but not on likelihood to visit. And neither influences destination preference.

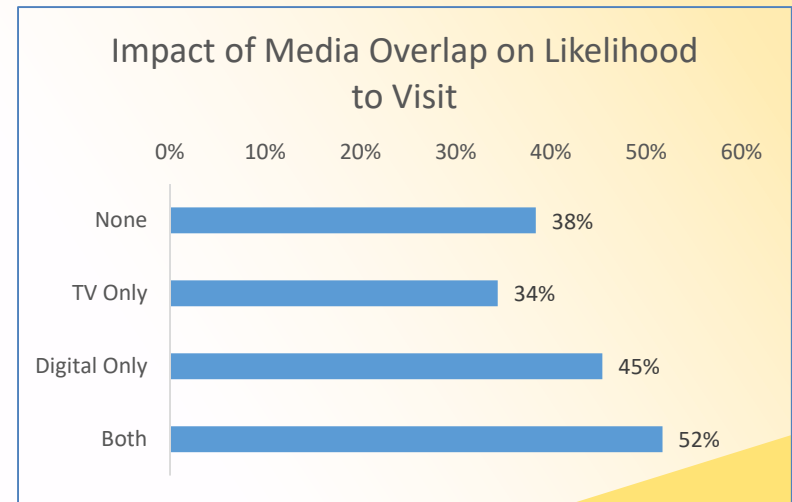
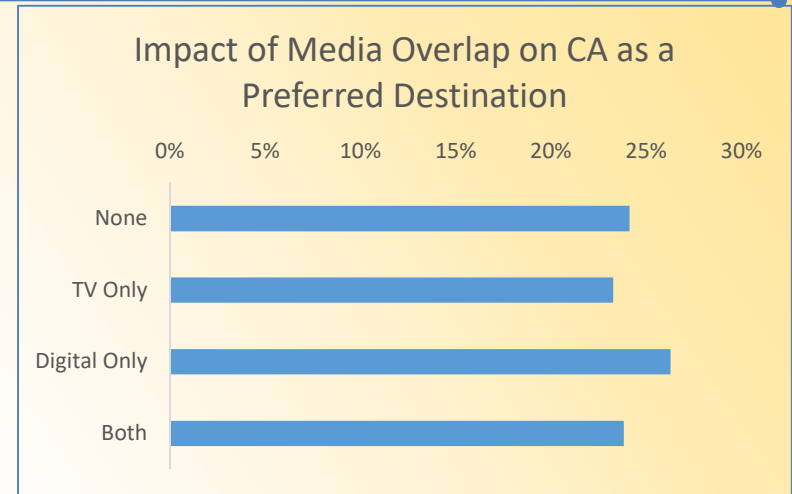
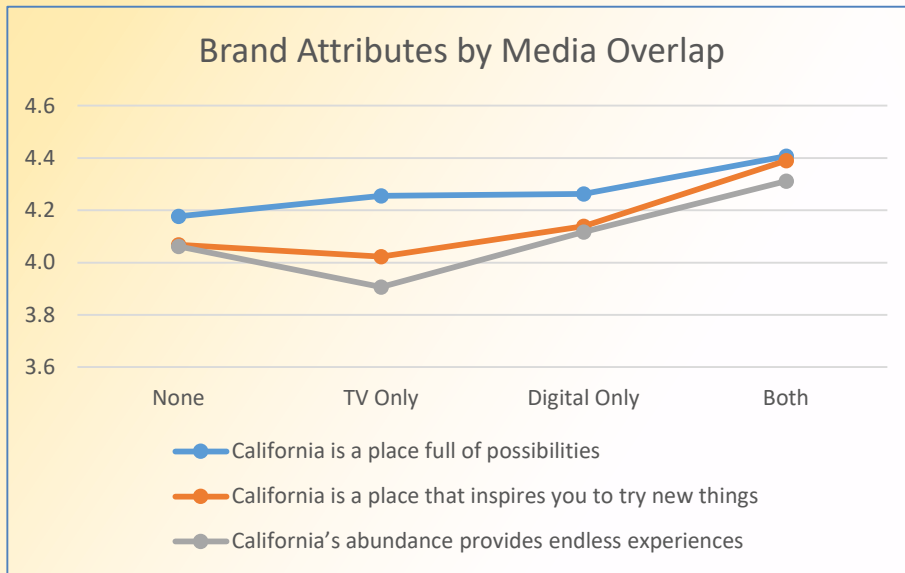


Foundational High Impact Brand Attributes	No Recall	Recall	Diff.
California is a place full of possibilities	4.2	4.4	0.1
California is a place that inspires you to try new things	4.1	4.3	0.2
California's abundance provides endless experiences	4.1	4.2	0.2

Foundational Non-High Impact Brand Attributes	No Recall	Recall	Diff.
California is a place full of possibilities	4.2	4.3	0.1
California is a place that inspires you to try new things	4.1	4.3	0.1
California's abundance provides endless experiences	4.1	4.2	0.1

# Media Overlap

- With those only being exposed to TV being very small its impact appears negative. However when seen in conjunction with digital the combination is significantly positive.





# Methodology

- SMARInsights has developed a research methodology based on how consumers make their travel decisions. The methodology evaluates the effectiveness of a destination's marketing efforts at each point in the decision-making process. The awareness wave of research evaluates the media reach, strength of the creative, and the impact on brand perceptions, information gathering, and intent to travel.
- A total of 1,474 interviews were conducted online during May 2016, with surveying throughout Mexico.
- Participants were screened to be travel decision-makers who have traveled outside of the Mexico or were interested in taking a trip to the United States.
- Quotas were established for Visit California's Family target.

