



# 2015 Brazil Pre-Wave

December 2015



# Research Design

- Before Visit California begins advertising in Brazil, there is interest in understanding consumer perceptions of the state, past visitation, and interest in visiting. This pre-advertising wave also provides a glimpse of California's competitive position in the market. These results establish norms against which future performance can be evaluated.
- The pre-wave of research encompasses:
  - » California's competitive position in terms of past visitation and interest
  - » Consumer awareness of California and its competitors
  - » The state's and competitors' image
  - » California product that would motivate travel
- Though Visit California began targeting Brazil with SEM and social media in October 2015, paid advertising begins in February 2016. The overall target for the media will be consumers in the top 33% of household income in the country. This encompasses what is classified as Class A and B in the social structure in Brazil. Families and the affluent are also considered opportunity targets.
- Only Classes A & B were interviewed for the pre-wave, with 754 total interviews conducted online in November 2015. Of this sample, 334 are in the highest income bracket of R\$125,000 or more and 295 respondents have children under age 18 in the household.
- Once data collection was completed, the data were cleaned, coded and translated.

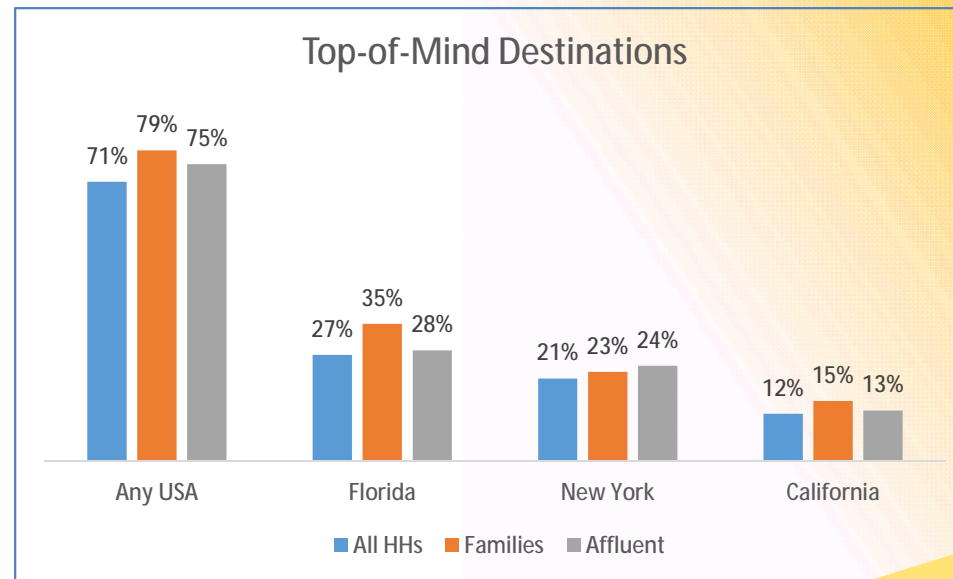
## European countries dominate Brazilians' top-of-mind destinations for leisure travel.

- Individual European countries and the continent as a whole are more prevalent top-of-mind destinations among Brazilians than the U.S. or individual states or cities.
- Of U.S. destinations, cities were more often named than states, with New York, Miami, and Orlando most often mentioned.



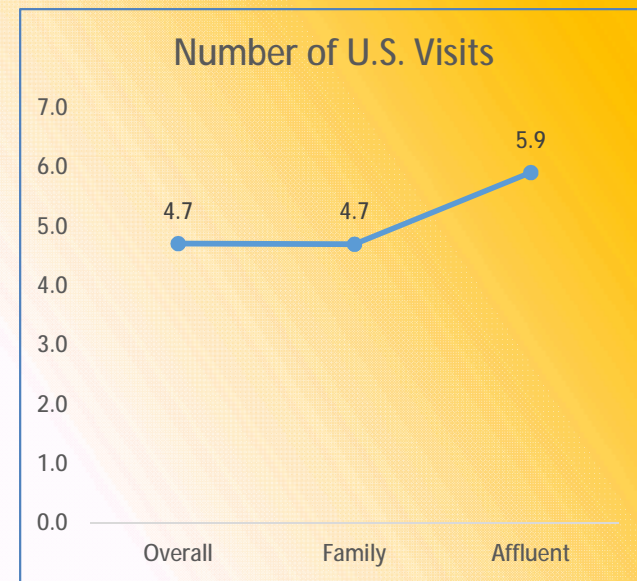
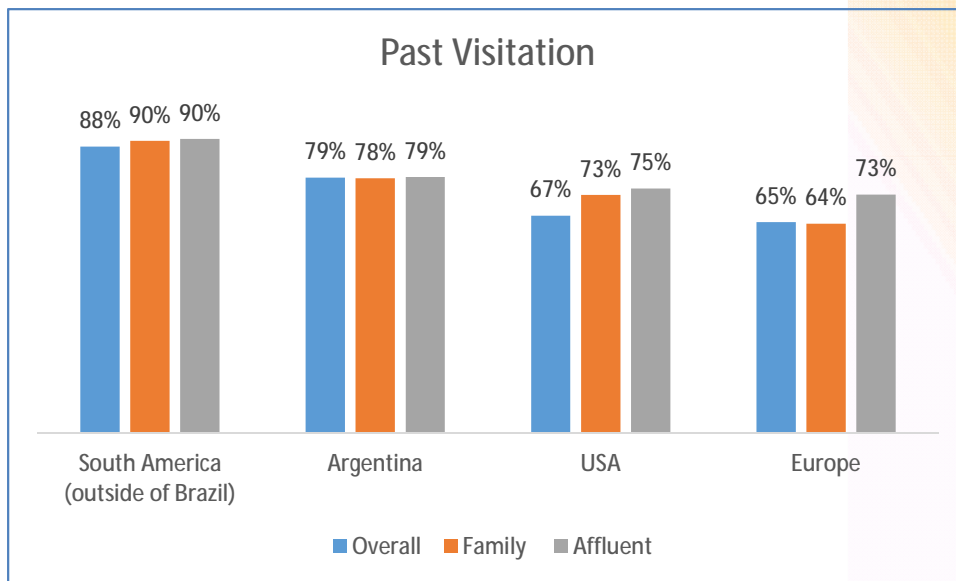
## Numerous U.S. destinations are top-of-mind, led by New York and Florida, with families more often mentioning California.

- Florida and New York dominate U.S. travel from Brazil. The National Travel & Tourism Office within the U.S. Department of Commerce estimates there were 2.3 million arrivals from Brazil in 2014. Of these, 61% visited Florida, and 34% visited New York. Given very few are visiting more than one state, this leaves very little travel to other U.S. destinations.
- Of all Brazilian A/B households, 71% name the U.S. or an American state or city top-of-mind. For specific destinations, Florida is most often mentioned, especially by those with children. The affluent more often mention New York than other consumers.
- California is more top-of-mind for the opportunity targets of families and affluent than for A/B consumers overall.



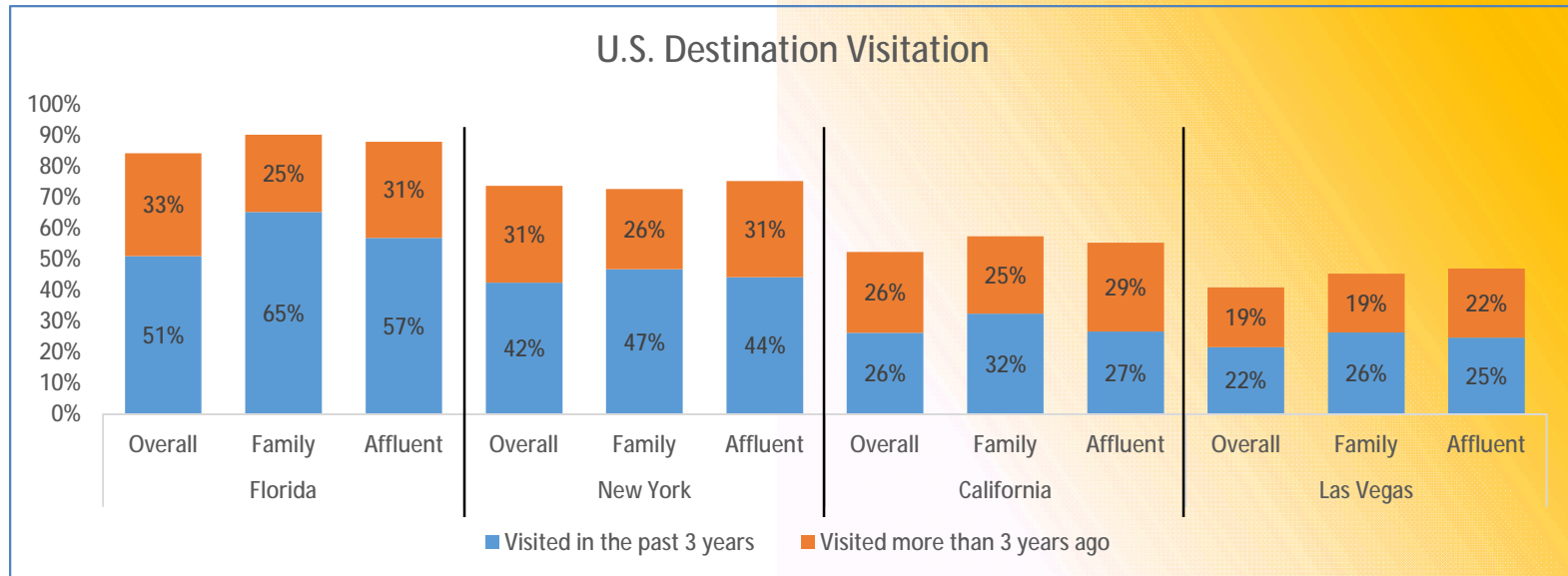
# The A & B classes have high rates of travel, with higher than average visitation from the opportunity targets.

- Given the top third of income earners are in Brazil's A and B classes, there are high rates of travel from the target audience. More than two-thirds of these households have ever visited with U.S., with even higher rates of visitation from the family and affluent opportunity targets.
- Consumers also make multiple trips to the U.S. As would be expected, the affluent households have more trips than other past U.S. visitors.



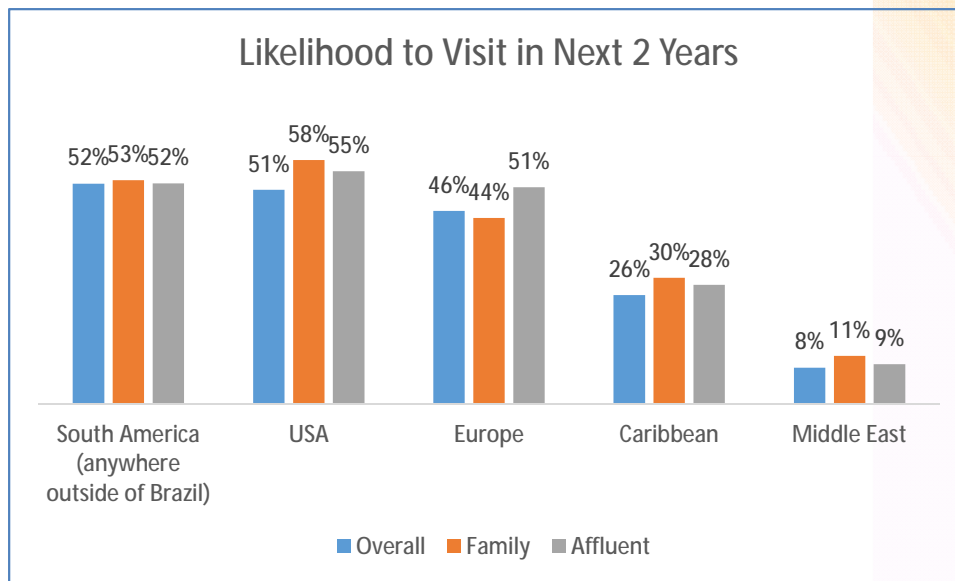
# More than half of those who have been to the U.S. have been to California, with higher visitation among those with children.

- Florida and New York are significantly easier destinations for Brazilians. A direct flight from Rio to Miami is only eight and half hours. São Paulo to New York is less than 10 hours. But São Paulo to LAX is more than 12 hours, longer than a flight to Madrid or Paris.
- Even so, half of those who have been to the U.S. have visited California, with family visitors having more recent visits.



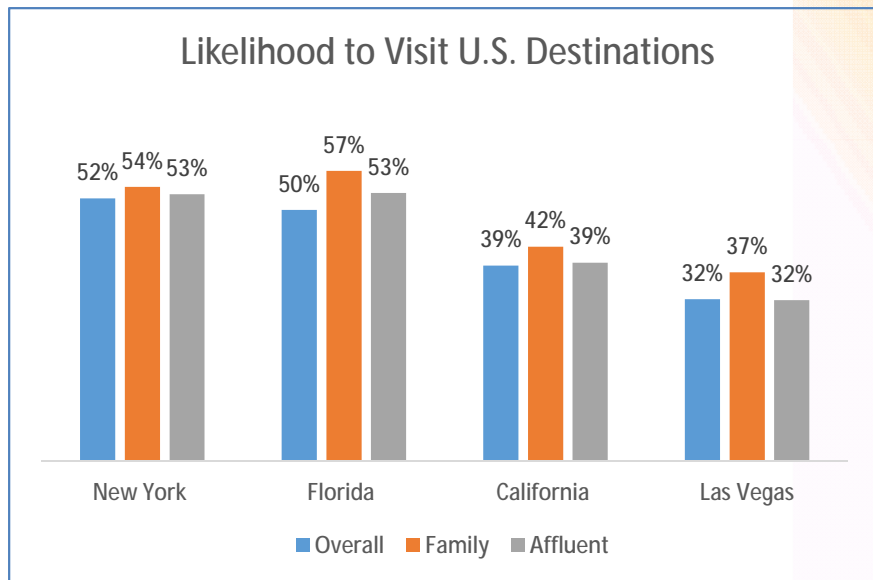
# Although the U.S. is a long-haul trip for Brazilians, they are willing to do so, especially those who have recently visited.

- Likelihood to travel to the U.S. is nearly equal to that of more nearby travel in other South American countries. Based on other experience in the market, consumers from here go to the U.S. for their buying power, shopping for goods they cannot get at home.
- Both of the opportunity targets have higher interest in visiting the U.S. than other consumers. Families have far more interest in visiting the U.S., while affluent consumers indicate more likelihood than others to visit Europe.



# Repeat U.S. travelers are the prime audience for California.

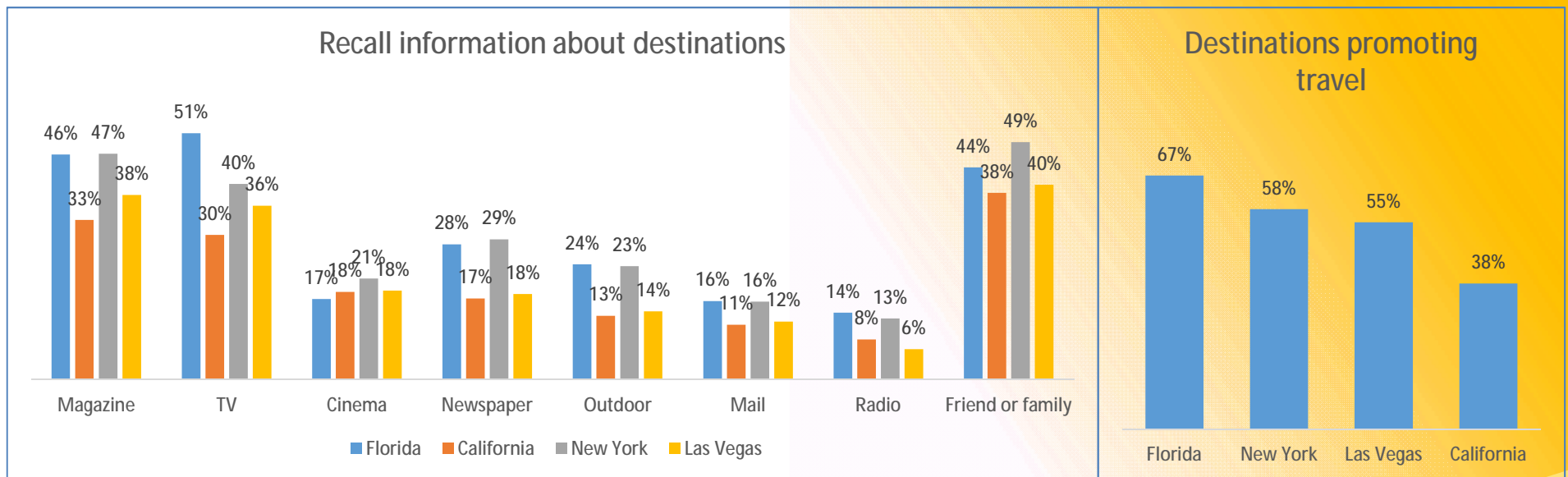
- Just as with overall U.S. travel, those with past visitation to California, especially those who have visited in the past three years, are more interested in again visiting.
- Although family travelers are more interested in visiting California than the overall, affluent visitors have no more or less interest than other travelers.
- Florida typically receives more than twice the visitation as New York, but family travelers are more interested in visiting New York in the future.





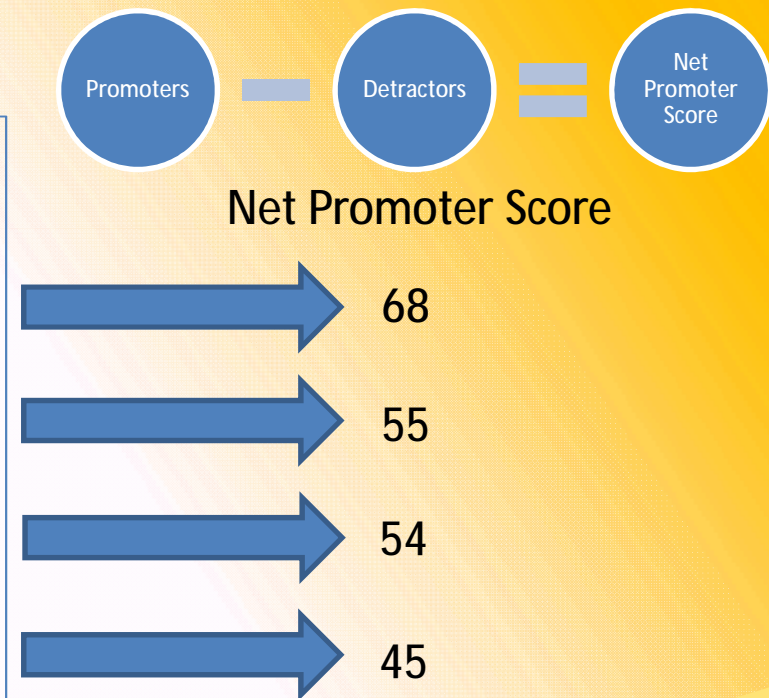
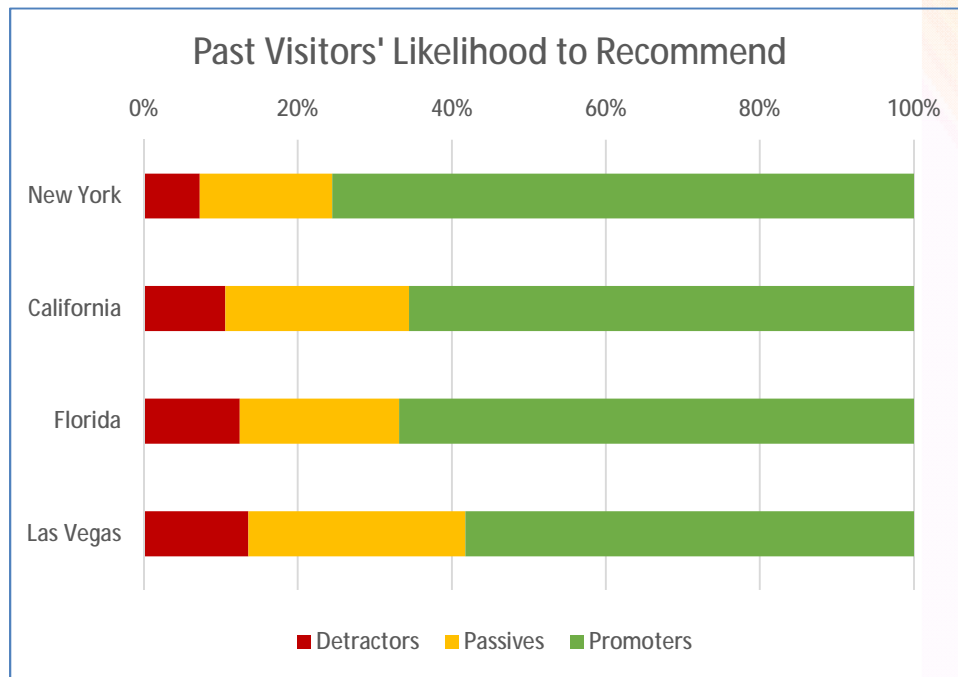
# Even without paid media, consumers are being exposed to messages about destinations in a variety of ways.

- California messaging is being delivered to this audience, even without paid marketing. There is less “conversation” about the state, even less than Las Vegas, which has significantly less interest and visitation.
- Paid media is certainly effective at generating interest and visitation, but it continues to be recommendations by friends and family that carry the most weight. Given this, the friends and family “conversation” about California could be an interesting benchmark to evaluate once the media begins.



# California has a higher net promoter score than Florida, the most visited U.S. destination by Brazil consumers.

- A net promoter score (NPS) is the difference between “promoters” (those rating a product a 9 or 10 on a 10-point scale) and “detractors” (those rating the product 1-6). Past visitors to the corresponding destinations give New York the highest net promoter score, followed by California.
- Among the travel and hospitality industry, leading companies have an NPS between 46 and 62. However, these are companies providing goods or services such as airlines, websites, and hotels.



# California's image is dominated by food and wine, with its relaxed, outdoor experiences unique among competitors.

- Even before advertising runs in the market, Brazilians have a strong image of California. Not only is the state known for food and wine, but there also are high associations with outdoor product and a youthful attitude.
- Florida dominates the family and value territory.
- New York is a place to indulge in upscale experiences, including fine dining, shopping, and cultural activities.
- Las Vegas' only stronghold is on friendly and fun.

|  | California | Florida | New York | Las Vegas |
|--|------------|---------|----------|-----------|
| A place where you can discover small towns with local flavor | 60%        | 20%     | 13%      | 7%        |
| An abundance of unique culinary experiences                  | 58%        | 14%     | 20%      | 7%        |
| A place where food and wine are part of the lifestyle        | 53%        | 8%      | 31%      | 8%        |
| Has excellent beaches  | 52%        | 40%     | 6%       | 2%        |
| Variety of active outdoor experiences                        | 48%        | 31%     | 15%      | 5%        |
| Youthful   | 43%        | 29%     | 16%      | 12%       |
| Is scenic and beautiful                                      | 42%        | 16%     | 25%      | 17%       |
| Casual and laid back   | 39%        | 31%     | 18%      | 12%       |
| Free spirited and accepting                                  | 39%        | 21%     | 25%      | 16%       |
| A place where music is part of the lifestyle                 | 37%        | 9%      | 39%      | 15%       |
| Has a unique and desirable lifestyle                         | 37%        | 18%     | 34%      | 11%       |
| Many unique vacation experiences in one trip                 | 34%        | 25%     | 25%      | 16%       |
| Fun and lively   | 34%        | 24%     | 28%      | 15%       |
| A place where people live life to the fullest                | 31%        | 13%     | 24%      | 32%       |
| A place I feel safe and secure                               | 31%        | 32%     | 27%      | 10%       |
| A place that delivers luxury experiences                     | 31%        | 15%     | 26%      | 28%       |
| A good place to bring kids                                   | 29%        | 57%     | 10%      | 4%        |
| A place where I can be myself                                | 29%        | 25%     | 35%      | 11%       |
| A place to indulge myself                                    | 29%        | 20%     | 36%      | 15%       |
| A place that inspires you to try new things                  | 28%        | 12%     | 33%      | 26%       |
| A place that inspires innovation and new trends              | 25%        | 7%      | 60%      | 8%        |
| A place full of possibilities                                | 24%        | 14%     | 47%      | 14%       |
| Has large cities with exciting urban experiences             | 22%        | 8%      | 51%      | 20%       |
| Provides a good value for the money                          | 21%        | 36%     | 29%      | 14%       |
| Has an abundance of arts and cultural experiences            | 19%        | 7%      | 69%      | 6%        |
| Welcoming and friendly people                                | 18%        | 21%     | 10%      | 51%       |
| Offers the best of everything in one place                   | 18%        | 17%     | 54%      | 10%       |
| A place that doesn't take themselves too seriously           | 18%        | 21%     | 9%       | 52%       |
| Offers unique dining from causal to upscale                  | 17%        | 10%     | 59%      | 14%       |
| Offers unique shopping experiences                           | 12%        | 31%     | 52%      | 5%        |

## Brazilians see California as a unique destination for the variety the state offers, but many reference climate, beauty, and attitude.

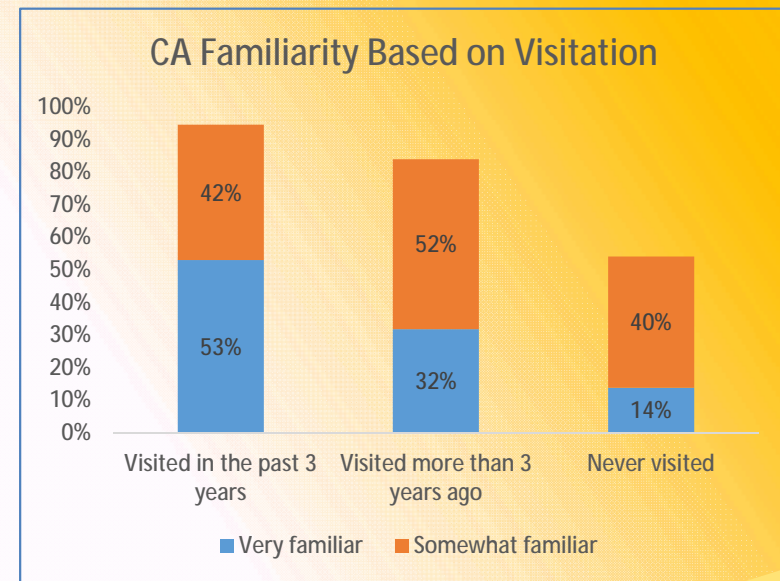
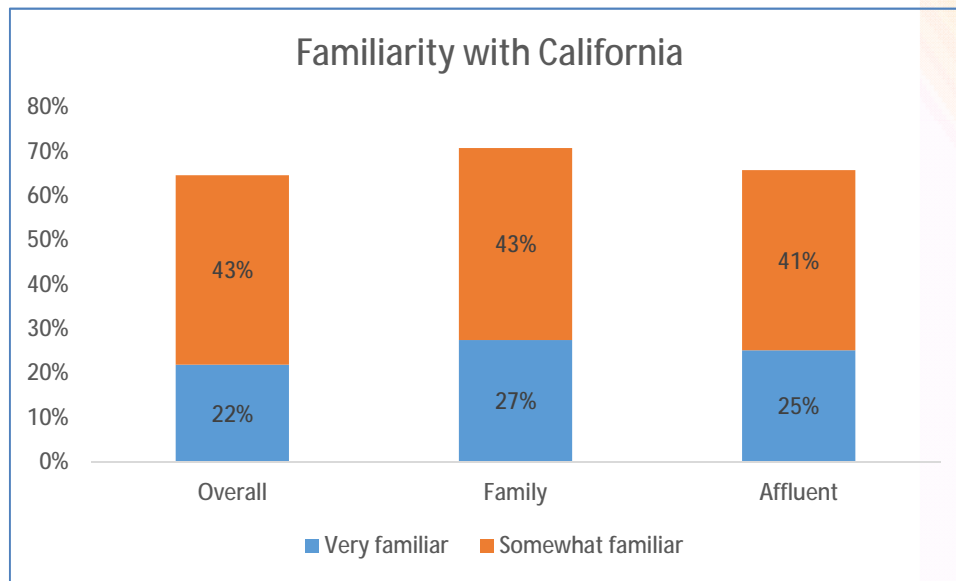
- California is different from other travel destinations because:
  - » *The climate, beaches, vineyards and Hollywood all have their unique charm.*
  - » *The combination of beaches, wines, shopping, and theme parks, tourist hotspots and lots of luxury.*
  - » *It seems to be a more laid-back lifestyle, with beautiful places, and history.*
  - » *The contrast between beaches and mountains, desert regions and wineries, large cities.*
  - » *California is a lifestyle, sun-tanned people on the beach and surfers. It offers different destinations for gastronomy.*



73% view  
California as  
a unique  
destination.

## Even those with limited experience with California have some familiarity with the state as a leisure destination.

- Just as in the U.S. where states are some of the most well-branded products, consumers in Brazil indicate familiarity with California, even if they have never visited. While Visit California has not been investing in paid media in Brazil, there are numerous other sources delivering information about the state, including media outlets, pop culture, and past visitors.
- The family target, which has the most recent visitation to the state, has the highest familiarity. These will be important benchmarks against which awareness of the media will be evaluated.



## Although food and wine dominate the image of state, Brazilians are most interested in city experiences.

- Los Angeles and San Francisco dominate consumer interest. Theme parks are high on the list for families, and San Diego and Napa are appealing to the affluent traveler

| Product interest                                    | Overall | Family | Affluent |
|---|---------|--------|----------|
| Los Angeles   | 47%     | 47%    | 48%      |
| San Francisco                                       | 47%     | 41%    | 53%      |
| Hollywood   | 43%     | 45%    | 40%      |
| Disneyland  | 31%     | 37%    | 26%      |
| Beaches   | 30%     | 35%    | 26%      |
| Universal Studios Hollywood                         | 29%     | 29%    | 28%      |
| Beverly Hills                                       | 23%     | 27%    | 20%      |
| San Diego   | 21%     | 19%    | 24%      |
| Shopping outlet malls                               | 20%     | 22%    | 18%      |
| Napa Valley/wineries                                | 20%     | 16%    | 27%      |
| Golden Gate Bridge                                  | 16%     | 15%    | 16%      |
| Places that are not the typical tourist attractions | 13%     | 12%    | 12%      |
| SeaWorld  | 12%     | 15%    | 10%      |
| Music and cultural festivals                        | 12%     | 9%     | 9%       |
| Death Valley/deserts                                | 11%     | 13%    | 12%      |
| Yosemite/Half Dome                                  | 10%     | 7%     | 13%      |
| Highway 1/California coastline                      | 10%     | 7%     | 12%      |
| Joshua Tree National Park                           | 9%      | 10%    | 9%       |
| Food festivals/farmer's markets                     | 8%      | 7%     | 7%       |
| Santa Barbara                                       | 8%      | 6%     | 9%       |
| Palm Springs  | 7%      | 6%     | 7%       |
| Lake Tahoe  | 7%      | 5%     | 8%       |
| Professional sports                                 | 6%      | 7%     | 8%       |
| Monterey  | 3%      | 4%     | 4%       |
| California Redwoods                                 | 3%      | 4%     | 3%       |
| Big Sur   | 2%      | 2%     | 2%       |
| Mammoth Lakes                                       | 1%      | 1%     | 1%       |
| Mt. Shasta  | 1%      | 1%     | 1%       |

Questionnaire  
**APPENDIX**

# Questionnaire

## California Tourism Brazil CD

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

1. .... Self
2. .... Spouse/Partner
3. .... Significant Other

SCREENING QUESTIONS

52. Have you ever taken a leisure trip where you traveled outside of Brazil?

1. Yes
2. No

53. Have you taken a leisure trip to the U.S. in the past 2 years?

1. Yes
2. No

54. How likely are you to take a leisure trip to the U.S. in the next 3 years?

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

55. What is your age? \_\_\_\_\_

56. Which of the following categories best represents the total annual income for your household before taxes? Please include income from all sources. (ASK FOR THE ANNUAL INCOME FROM ALL SOURCES)

1. Less than R\$29,999
2. R\$30,000 to R\$59,999
3. R\$60,000 to R\$79,999
4. R\$80,000 to R\$94,999
5. R\$95,000 to R\$109,999
6. R\$110,000 to R\$124,999
7. R\$125,000 or more

WILL BUY SAMPLE FOR A & B CLASSES

TERMINATE IF 51-5, 52-0, 53-0 & 54 IS 4, 55-18, 56-3

1. Thinking about travel destinations (cities, states, countries), which five come to mind first?

01. \_\_\_\_\_
02. \_\_\_\_\_
03. \_\_\_\_\_
04. \_\_\_\_\_
05. \_\_\_\_\_

1a. Have the current challenges in the Brazilian economy and value of the Real abroad impacted the amount of travel you have done in the past 12 months? (Select all that apply.)

- Caused you to travel less or spend less on travel.
- Caused you to choose destinations that are less expensive
- Caused you to choose domestic rather than international travel
- Has not impacted your travel decisions (EXCLUSIVE CHOICE)

Strategic Marketing & Research Insights

- 1 -

1. Thinking about the most you are planning in the next 12 months, how likely is each of the following?

|  | Not at all likely | Not very likely | Somewhat likely | Very likely | Certain |
|--|-------------------|-----------------|-----------------|-------------|---------|
| You will take fewer leisure trips than last year           | 1                 | 2               | 3               | 4           | 5       |
| You will choose destinations closer to home than last year | 1                 | 2               | 3               | 4           | 5       |
| You will take shorter trips than last year                 | 1                 | 2               | 3               | 4           | 5       |
| You will spend less than you did when traveling last year  | 1                 | 2               | 3               | 4           | 5       |
| You will not choose to take international trips            | 1                 | 2               | 3               | 4           | 5       |

2. Which of the following destinations have you visited for a leisure trip?

| DESTINY                                    | Visited in the past 3 years | Visited more than 3 years ago | Never visited |
|--|-----------------------------|-------------------------------|---------------|
| USA  |                             |                               |               |
| Caribbean                                  |                             |                               |               |
| Europe (anywhere within Europe)            |                             |                               |               |
| United Kingdom (UK)                        |                             |                               |               |
| Spain                                      |                             |                               |               |
| France                                     |                             |                               |               |
| Italy                                      |                             |                               |               |
| Domestic                                   |                             |                               |               |
| South America (anywhere outside of Brazil) |                             |                               |               |
| Brazil                                     |                             |                               |               |
| Argentina                                  |                             |                               |               |
| Central America                            |                             |                               |               |
| Within Brazil                              |                             |                               |               |
| Europe East                                |                             |                               |               |

IF Q2 USA = HAS VISITED, ASK 2A and 2B

2a. How many times have you visited the U.S. for a leisure trip?

| DESTINY                 | Visited in the past 3 years | Visited more than 3 years ago | Never visited | How many times have you visited |
|-------------------------|-----------------------------|-------------------------------|---------------|---------------------------------|
| Florida (USA)           |                             |                               |               |                                 |
| California (USA)        |                             |                               |               |                                 |
| New York (USA)          |                             |                               |               |                                 |
| Las Vegas, Nevada (USA) |                             |                               |               |                                 |

2b. How many times have you visited the following U.S. destinations for a leisure trip?

| DESTINY                 |  |
|-------------------------|--|
| Florida (USA)           |  |
| California (USA)        |  |
| New York (USA)          |  |
| Las Vegas, Nevada (USA) |  |

Strategic Marketing & Research Insights

- 2 -



# Questionnaire

1. How likely are you to visit each of the following locations for a leisure trip in the next two years?

| ROTATE                                     | No. at all likely | Not very likely | Somewhat likely | Very likely | Already planning a trip |
|--|-------------------|-----------------|-----------------|-------------|-------------------------|
| Caribbean                                  | 1                 | 2               | 3               | 4           | 5                       |
| Europe                                     | 1                 | 2               | 3               | 4           | 5                       |
| South America (anywhere outside of Brazil) | 1                 | 2               | 3               | 4           | 5                       |
| Within Brazil                              | 1                 | 2               | 3               | 4           | 5                       |
| Middle East                                | 1                 | 2               | 3               | 4           | 5                       |
| USA  | 1                 | 2               | 3               | 4           | 5                       |

TOTAL USA – SOMEWHAT/VERY LIKELY OR ALREADY PLANNING: ASK 3A

3a. How likely are you to visit each of the following U.S. destinations for a leisure trip in the next two years?

| ROTATE                  | No. at all likely | Not very likely | Somewhat likely | Very likely | Already planning a trip |
|-------------------------|-------------------|-----------------|-----------------|-------------|-------------------------|
| Florida (USA)           | 1                 | 2               | 3               | 4           | 5                       |
| California (USA)        | 1                 | 2               | 3               | 4           | 5                       |
| New York (USA)          | 1                 | 2               | 3               | 4           | 5                       |
| Las Vegas, Nevada (USA) | 1                 | 2               | 3               | 4           | 5                       |

3. How likely are you to recommend each of the following places to your friend or family as a destination to visit? (ONLY ASK OF THOSE WHO VISITED PRIOR) (Q2)

| [ROTATE]                                   | No. at all likely | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | Extremely likely 10 |
|--|-------------------|---|---|---|---|---|---|---|---|---|---------------------|
| Caribbean                                  |                   |   |   |   |   |   |   |   |   |   |                     |
| Europe                                     |                   |   |   |   |   |   |   |   |   |   |                     |
| South America (anywhere outside of Brazil) |                   |   |   |   |   |   |   |   |   |   |                     |
| Within Brazil                              |                   |   |   |   |   |   |   |   |   |   |                     |
| Middle East                                |                   |   |   |   |   |   |   |   |   |   |                     |
| USA (anywhere and within USA)              |                   |   |   |   |   |   |   |   |   |   |                     |

3a. How likely are you to recommend each of the following U.S. places to your friend or family as a destination to visit? (ONLY ASK OF THOSE WHO VISITED PRIOR) (Q2)

| [ROTATE]                | No. at all likely | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | Extremely likely 10 |
|-------------------------|-------------------|---|---|---|---|---|---|---|---|---|---------------------|
| Florida (USA)           |                   |   |   |   |   |   |   |   |   |   |                     |
| California (USA)        |                   |   |   |   |   |   |   |   |   |   |                     |
| New York (USA)          |                   |   |   |   |   |   |   |   |   |   |                     |
| Las Vegas, Nevada (USA) |                   |   |   |   |   |   |   |   |   |   |                     |

6. If time and money were not a consideration, which U.S. state would you most like to visit? (SHOW DRUG DOWN LIST OF STATES PLUS DC.)

Strategic Marketing & Research Insights  
- 3 -

7. For which of these vacation destinations have you seen or heard advertising or information promoting it best? (Select all that apply.) (ROTATE)

| ROTATE                                     |                          |
|--|--------------------------|
| USA  | <input type="checkbox"/> |
| Caribbean                                  | <input type="checkbox"/> |
| Europe (anywhere within Europe)            | <input type="checkbox"/> |
| United Kingdom (UK)                        | <input type="checkbox"/> |
| Spain                                      | <input type="checkbox"/> |
| France                                     | <input type="checkbox"/> |
| Italy                                      | <input type="checkbox"/> |
| Portugal                                   | <input type="checkbox"/> |
| South America (anywhere outside of Brazil) | <input type="checkbox"/> |
| Argentina                                  | <input type="checkbox"/> |
| Central America                            | <input type="checkbox"/> |
| Within Brazil                              | <input type="checkbox"/> |
| Middle East                                | <input type="checkbox"/> |
| None of these (ANCHOR)                     | <input type="checkbox"/> |

F07 USA – YES: ASK 7A

7a. For which of these U.S. vacation destinations have you seen or heard advertising or information promoting it best? (Select all that apply.) (ROTATE)

| ROTATE                  |                          |
|-------------------------|--------------------------|
| Florida (USA)           | <input type="checkbox"/> |
| California (USA)        | <input type="checkbox"/> |
| New York (USA)          | <input type="checkbox"/> |
| Las Vegas, Nevada (USA) | <input type="checkbox"/> |
| None of these (ANCHOR)  | <input type="checkbox"/> |

8. Where have you recently seen, heard or read about these destinations? Please think about any trip that has finished in these states as a whole or just in part. In cities, regions or markets. (select all that apply)

|   | Florida (USA) | California (USA) | New York (USA) | Las Vegas, Nevada (USA) |
|---|---------------|------------------|----------------|-------------------------|
| TV  |               |                  |                |                         |
| Internet  |               |                  |                |                         |
| Newspaper   |               |                  |                |                         |
| Magazines   |               |                  |                |                         |
| Radio   |               |                  |                |                         |
| Through the mail (direct mail)                                    |               |                  |                |                         |
| As an employee or contractor                                      |               |                  |                |                         |
| From a travel agency or similar in your country or in the country |               |                  |                |                         |
| From a travel agent's website                                     |               |                  |                |                         |

Strategic Marketing & Research Insights  
- 4 -

# Questionnaire

|  |  |  |  |
|--|--|--|--|
| Number of visits with friends (total post on cover etc.) |  |  |  |
| Are you currently visiting any state over                |  |  |  |
| 1. How often? (2 = often, 1 = once)                      |  |  |  |

8. Where have you read/seen/heard/read about these destinations? Please tick all that apply (any help that has focused on the state as a whole or does just mention facilities, regions or attractions). (Select all that apply.)

|                                      | Florida (USA) | California (USA) | New York (USA) | Las Vegas, Nevada (USA) |
|--------------------------------------|---------------|------------------|----------------|-------------------------|
| At a travel agency                   |               |                  |                |                         |
| At a travel agency taking clients    |               |                  |                |                         |
| Travel agent's website               |               |                  |                |                         |
| Travel agent's website               |               |                  |                |                         |
| Travel agent's social media          |               |                  |                |                         |
| Online reviews (e.g. TripAdvisor)    |               |                  |                |                         |
| Local tour or travel agency          |               |                  |                |                         |
| Travel agency's website              |               |                  |                |                         |
| Travel agent's package search site   |               |                  |                |                         |
| Social networking website (Facebook) |               |                  |                |                         |
| Travel agent's blog                  |               |                  |                |                         |
| Video sharing site (e.g. YouTube)    |               |                  |                |                         |
| Other                                |               |                  |                |                         |

9. If time and money were not a consideration, how likely would you be to visit California?  
 1. Very Easy  
 2. Easy  
 3. Not likely  
 4. Not at all likely

10. How familiar are you with California as a holiday or vacation travel destination?  
 1. Very familiar  
 2. Somewhat familiar  
 3. Neither familiar nor unfamiliar  
 4. Somewhat unfamiliar  
 5. Not at all familiar

10. Do you think California is noticeably different from other travel destinations?  
 1. Yes  
 2. No

IF VISITING Q10 = 5 OR Q11

11. What makes California different from other travel destinations? \_\_\_\_\_

12. If you were to visit California in the next year, which of the following California destinations would you be most likely to visit? Please select up to five destinations. (BUT ATE)

Strategic Marketing & Research Insights

- 5 -

- Golden Gate Bridge
- Hollywood
- Yosemite National Park
- Marin & Lakes
- Lake Tahoe
- Jedediah Tree National Park
- California Statewide
- Malibu
- Disneyland
- Universal Studios Hollywood
- San Francisco
- Disney
- Highway 1/Californian Coastline
- San Diego
- North Valley/Wine/Wineries
- Best outdoor sports (e.g. Marin, Clipper, Redwood, Giant, 49ers, Chugones, Slacks, Co. Line)
- Food, Best restaurant's available
- Los Angeles
- San Francisco
- San Diego
- Urban SoCal
- Santa Barbara
- Monterey
- Death Valley/Deserts
- Beaver Hills
- Places that aren't the typical tourist attractions
- Shopping outlets/malls
- Music and Cultural Festivals (Coachella Music Festival, Film Festival, Food Festival)
- Other, please specify:
- None

13. Please choose the destination that most fits each description. You may choose any destination for each description.

|   | Florida (USA) | California (USA) | New York (USA) | Las Vegas, Nevada (USA) |
|---|---------------|------------------|----------------|-------------------------|
| Very unique travel experiences in one trip          |               |                  |                |                         |
| Fun and lively                                      |               |                  |                |                         |
| Free or reduced cost                                |               |                  |                |                         |
| Scenic  |               |                  |                |                         |
| A place that inspires fun activities and new trends |               |                  |                |                         |
| Cultural and food scene                             |               |                  |                |                         |
| Offers the best of everything in one place          |               |                  |                |                         |
| Has a unique and desirable lifestyle                |               |                  |                |                         |
| Provides a good value for the money                 |               |                  |                |                         |
| A place that doesn't take themselves too seriously  |               |                  |                |                         |

Strategic Marketing & Research Insights

- 6 -

# Questionnaire

|   |  |  |  |  |
|---|--|--|--|--|
| Well-known and friendly people                |  |  |  |  |
| A place that inspires you to try new things   |  |  |  |  |
| A place I feel safe and secure                |  |  |  |  |
| A place where I can be myself                 |  |  |  |  |
| A place where people live life to the fullest |  |  |  |  |
| A place full of possibilities                 |  |  |  |  |

12. Please choose the destination that best fits each description. You may choose more than one destination for each description.

|  | Florida (USA) | California (USA) | New York (USA) | Las Vegas, Nevada (USA) |
|--|---------------|------------------|----------------|-------------------------|
| A place to escape myself   |               |                  |                |                         |
| A place where nature is part of the lifestyle  |               |                  |                |                         |
| A place that delivers luxury experiences in an unforgettable and back-story                        |               |                  |                |                         |
| Has an abundance of arts and cultural experiences  |               |                  |                |                         |
| Is scenic and beautiful  |               |                  |                |                         |
| A place where you can discover small towns and local flavor  |               |                  |                |                         |
| Offers unique shopping experiences   |               |                  |                |                         |
| Variety of activities and/or experiences   |               |                  |                |                         |
| Has lots of fun activities and/or experiences – night life, dining, etc.                           |               |                  |                |                         |
| The most fun location  |               |                  |                |                         |
| A place where food and wine are part of the lifestyle  |               |                  |                |                         |
| A good place to bring kids because of the balance of attractions, outdoor and cultural experiences |               |                  |                |                         |
| Offers unique dining from casual to upscale  |               |                  |                |                         |
| An abundance of unique culinary experiences (farmers markets, farm tours, festivals, etc.)         |               |                  |                |                         |

The following questions are for classification purposes only so that your responses may be grouped with those of others.

1. What is your marital status? Are you...?
- Married/Single or married
  - Divorced/separated
  - Widowed
  - Single/never married

Strategic Marketing & Research Insights  
- 7 -

2. Including you, how many people are currently living in your household?
3. How many living in your household are children younger than 18?
4. Which of the following categories represents the last grade of school you completed?
- 1 High school
  - 2 Two-year degree
  - 3 Four-year degree
  - 4 Five-year degree
  - 5 Post-graduate degree
5. Are you...?
- Male
  - Female
6. In what state/federal district do you live?

Strategic Marketing & Research Insights  
- 8 -