



## The Role of Sustainability in Travel & Tourism 2016 – Visit California Proprietary Questions

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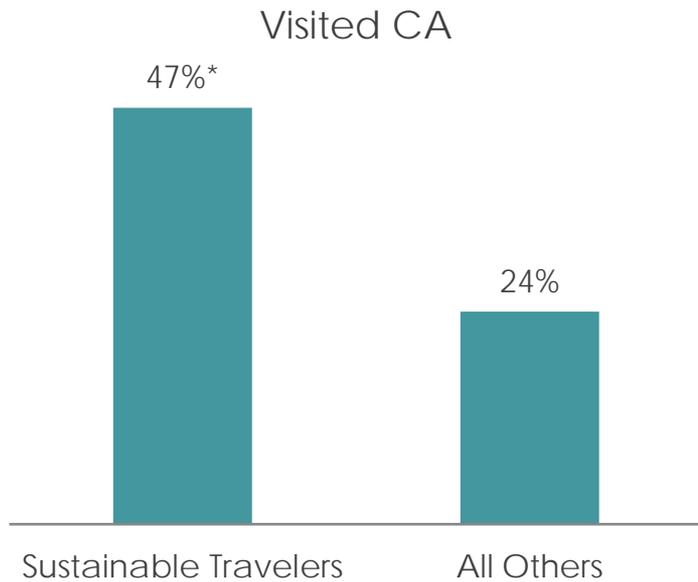
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Among all travelers, 38% visited California in the Past 3 years, nearly half, 47%, were Sustainable Travelers, a quarter, 24%, were All Others.



In terms of repeat visitation, about half of all travelers who said they are very likely to visit CA in the near future have visited CA in the past 3 years, 48%.

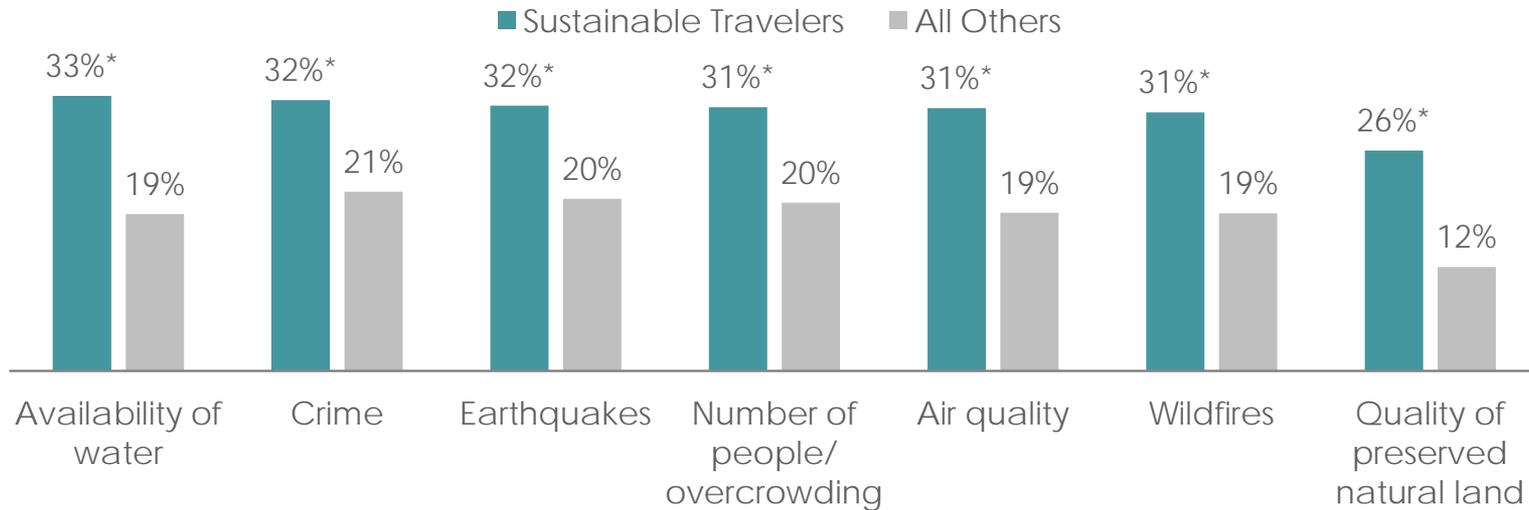
Interestingly, 61% of those who said sustainable practices were a **key** driver of destination choice, visited CA in the past 3 years.

\* Significantly higher at 95% confidence interval

Have you traveled to or within the following states for a leisure or vacation trip in the past three years (California)? N=2292

When asked about a future trip to California, about a third of Sustainable Travelers are very concerned about a number of environmental issues, natural disasters and crime. Among All Others, about a fifth are very concerned.

### Issues About Which Travelers are VERY Concerned



\* Significantly higher at 95% confidence interval

Regarding a future leisure or vacation trip to California, how concerned, if at all, would you be about the following? 4 point scale N=varies

Connecting is important. Sustainable Travelers will do their homework on communities they visit. A third will seek businesses that conserve natural and cultural heritage and that are environmentally conscious, they will also try and learn about social issues and practices.

### Travelers Are VERY Likely To...

■ Sustainable Travelers ■ All Others



\* Significantly higher at 95% confidence interval

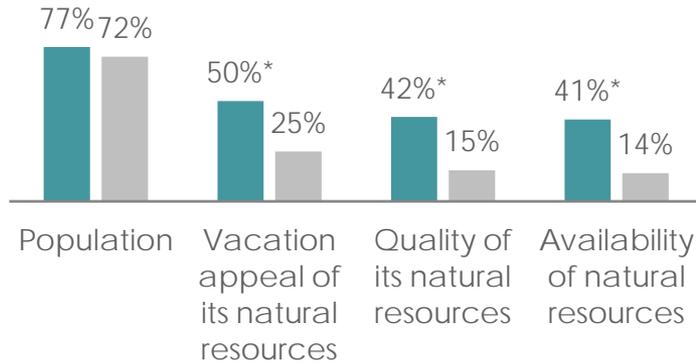
If you were to visit California on a leisure or vacation trip, how likely are you to do each of the following? 4 point scale N=varies

Half of Sustainable Travelers believe the vacation appeal of CA natural resources will increase over the next 10 years. Over 4 in 10 think the quality and availability of natural resources will increase.

## Over Next 10 Years: Top 2

Increase a lot, Increase a little

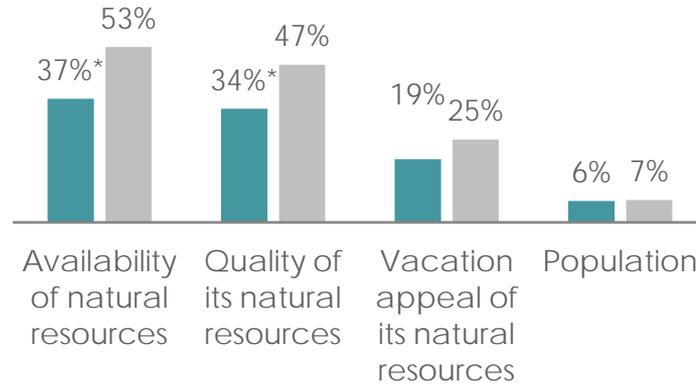
■ Sustainable Travelers ■ All Others



## Over Next 10 Years: Bottom 2

Decrease a little, Decrease a lot

■ Sustainable Travelers ■ All Others



\* Significantly higher at 95% confidence interval

Now, thinking about the State of California, please indicate the degree to which you expect each of the following to increase or decrease in the next 10 years. N=varies