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Global Research for Visit California
Global Report

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Research Methodology and Objectives

Methodology

25-Minute Online Interview

Market	Sample Size
Total (All countries)	n=6109
US	n=799
Canada	n=800
United Kingdom	n=503
Australia	n=507
Japan	n=500
France	n=500
Germany	n=500
South Korea	n=500
Mexico	n=500
China	n=500
Brazil	n=500

Sample

Sample criteria:

- Adults, age 25-65
- Those that plan to travel internationally in the next 1-2 years
- Would consider a trip to the US
- Minimum income criteria (market specific)
    - Top 25% income group

  or
    - Median income + Minimum amount would spend on vacation
- Decision maker for vacations (sole/shared)

Objectives

California's Consideration
& what it stands for

California's Equities
& how this measures up to the competition

Travel Planning Behaviors/Methods
& how this differs by country

Target Analysis through Clustering
& how these groups respond to travel and California

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Market Groupings

Markets have been grouped into three categories, derived from Visit California's Segmentation Strategy:

Brand	Mature	Growth
US, Canada, UK, Australia, Japan Characterized by: - High outbound travel volume - Strong visitation to CA - Potential for moderate growth - Exposure to brand advertising in recent years	France, Germany, South Korea, Mexico Characterized by: - Medium outbound travel volume - Moderate visitation to CA - Potential for moderate to strong growth	China, Brazil Characterized by: - Growing outbound travel volume - Potential for modest to significant growth over the next 5-10 years

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Agenda

1 Summary of Findings

2 Awareness & Consideration California vs. Competitors

3 Brand Equities California vs. Competitors

4 Consumer Decision Journey

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Summary by Market Group

<table>
<tr><th></th><th>Brand</th><th>Mature</th><th>Growth</th></tr>
<tr><td>Strategic</td><td>Build deeper familiarity with a reason to visit or rediscover. Reinforce perceptions of being a premium destination worth visiting again. Emotional associations around lifestyle can evoke memories of past visits and inspire rediscovery.</td><td colspan="2">Establish perceptions of offering unexpected experiences in a safe environment, associations critical to driving consideration.

Build on traditional perceptions of delivering on outdoor, family and scenic assets to reinforce abundance and having the best of everything in one place.

Define a unique, desirable lifestyle as a point of distinctiveness from competitors, to further encourage consideration to visit (already established in Europe).</td></tr>
<tr><td>Tactical</td><td>Leverage existing equities of abundance and best of everything to showcase Northern CA assets, including lesser known regions.

Ensure touchpoints offer beneficial information for past visitors looking for more, beyond gateways.</td><td colspan="2">Place gateway destinations, particularly Southern CA attractions, front and center. Address barriers around cost with emphasis on being worth paying more for ‘a trip of a lifetime.’

Ensure touchpoints (primarily web) facilitate research with pertinent information about featured attractions including logistics and safety.</td></tr>
</table>

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Awareness & Consideration

California vs. Competitors

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Summary of Findings – Awareness & Consideration

- California is a top US destination, ranking alongside New York and Hawaii as the most considered state.
- Consideration for California is strong versus competitors in Mature and Growth markets, indicating potential to increase visitation among these geographies. Latin countries (Mexico and Brazil) are more inclined to consider New York.
- Not surprisingly, California has stronger familiarity overall in Brand Markets. However, there is an opportunity to build a deeper level of knowledge in the Mature and Growth markets.
  - *Mexico and China benefit from strong familiarity already, likely aiding consideration levels.*

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California is a top of mind US destination, though it trails competitors in Brand and Mature markets outside of the US and Mexico

Unaided Consideration (Open end response) - US Destinations

	Brand					Mature				Growth	
	US	CA	UK	AU	JP	FR	DE	KR	MX	CN	BR
USA (NET)	**80%**	60%	61%	61%	53%	53%	51%	70%	74%	66%	68%
California (NET)	31%	17%	15%	10%	10%	11%	9%	14%	29%	21%	16%
Hawaii	29%	25%	3%	13%	37%	3%	5%	28%	8%	17%	5%
Florida (NET)	26%	17%	19%	3%	3%	5%	5%	1%	25%	0%	24%
New York	15%	13%	15%	21%	14%	21%	16%	22%	34%	18%	27%
Las Vegas (Nevada)	13%	7%	7%	6%	3%	2%	3%	3%	18%	2%	6%
Alaska	9%	2%	2%	4%	1%	1%	1%	1%	4%	0%	1%
Colorado (NET)	6%	1%	1%	1%	0%	1%	0%	2%	2%	0%	1%
Texas (NET)	5%	2%	0%	0%	0%	0%	0%	0%	11%	0%	1%

Indicates top US destination for country.
Red/Blue Indicates competitive score is higher/lower vs. California
QA1. Now we'd like you to think specifically about holiday/vacation destinations. What holiday/vacation destinations would you consider for you next big [international/domestic] leisure trip?

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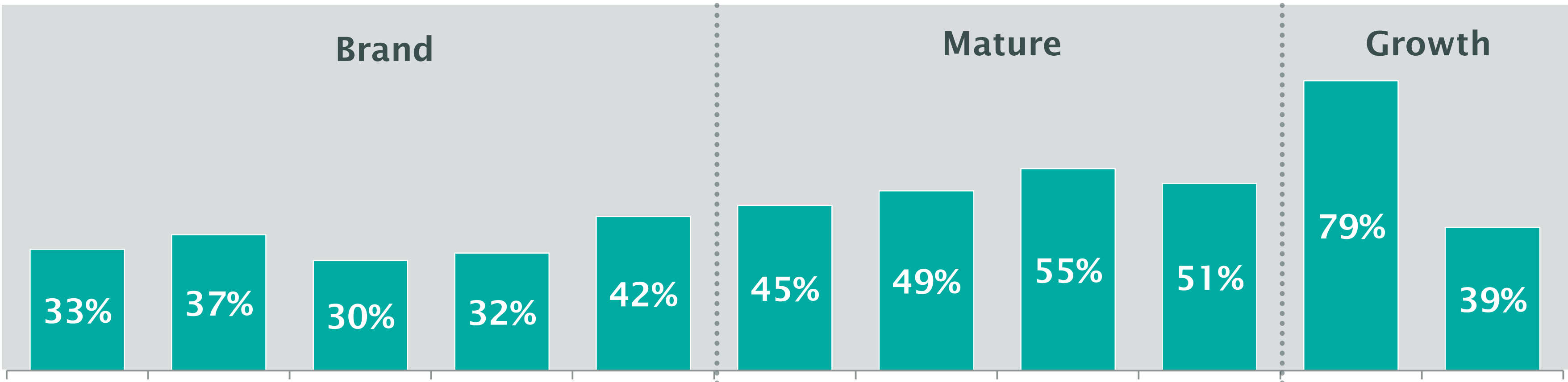
When prompted, CA competes with New York and Hawaii as the most considered destination

Consideration Top 2 Box Score

= California Consideration



	US	CA	UK	AU	JP	FR	DE	KR	MX	CN	BR
NY	19%	19%	33%	43%	44%	50%	45%	55%	60%	73%	56%
HI	44%	41%	17%	35%	59%	17%	38%	63%	40%	33%	35%
FL	27%	30%	30%	10%	25%	21%	37%	33%	41%	46%	28%
NV	18%	22%	8%	7%	12%	12%	14%	21%	29%	43%	8%
CO	14%	5%	8%	6%	11%	11%	11%	18%	9%	38%	7%
TX	11%	10%	4%	5%	11%	5%	13%	17%	19%	45%	8%

Red/Blue Indicates competitive score is higher/lower vs. California
Competitive leader
Q.A6a Which of the following destinations would you consider visiting?

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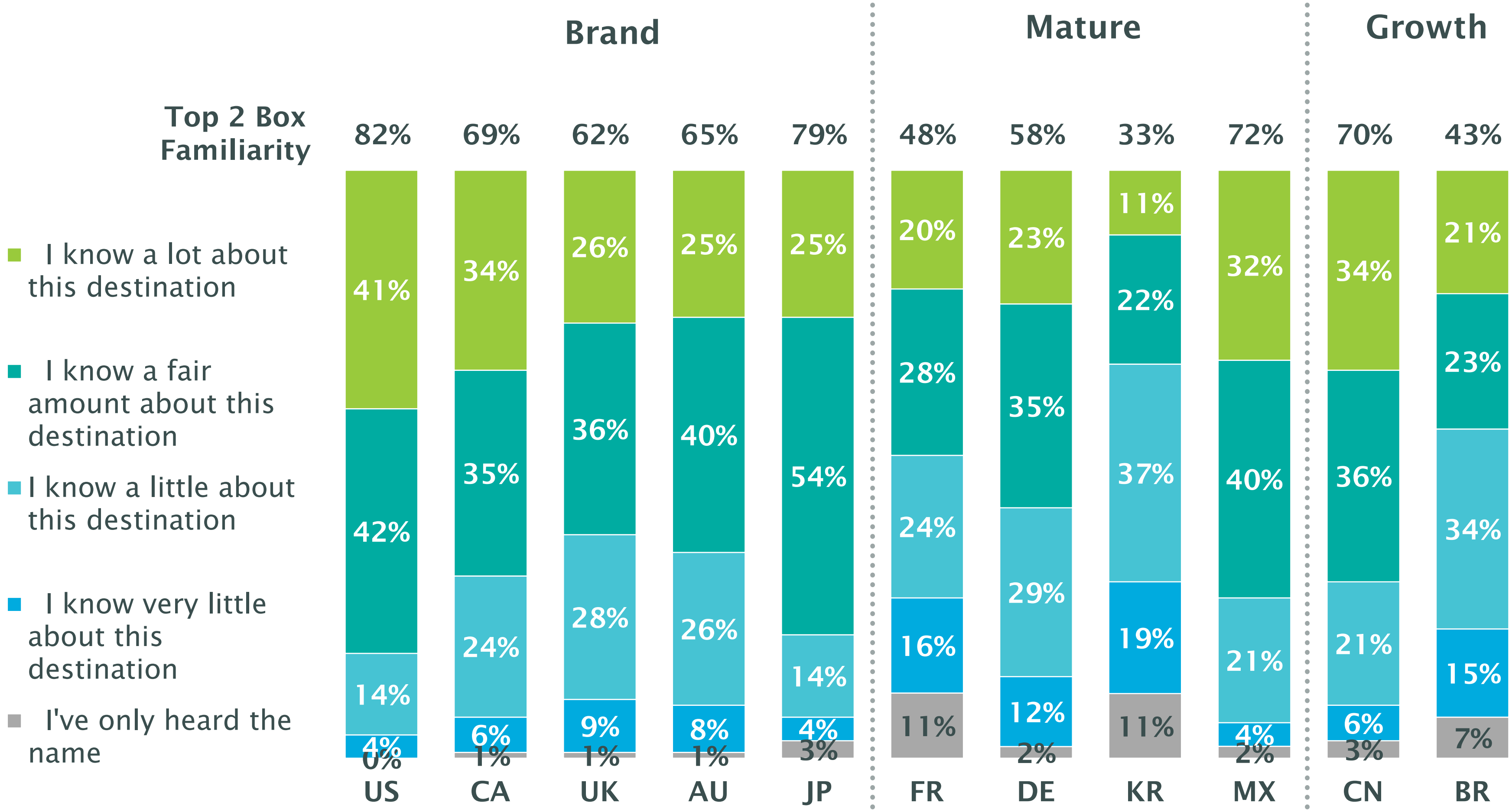
There is room to reinforce a higher degree of familiarity with CA among Mature and Growth markets (excluding Mexico and China)

California Familiarity



Q.B1 How much do you know about each of the following destinations?

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Brand Equities

California vs. Competitors

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Summary of Findings – Brand Equities

- California has an established image built around abundant offerings and family friendly experiences which go hand in hand with its fun, energetic persona.
  - *However there is room to reinforce associations that are currently more critical to consideration, including perceptions of being a premium destination, and emotional associations around unique lifestyle and unexpected experiences.*
  - *Florida is most strongly defined by being the family destination, while NY leads on cultural experiences.*
- California delivers on culinary and outdoor assets, with attractions in the north, (San Francisco, Napa Valley and Yosemite) rising to the top as motivators for travelers in Brand Markets.
  - *Southern California gateway assets, (Los Angeles, Hollywood, Disneyland and beaches), are more attractive in Mature and Growth markets that are generally less familiar.*
  - *Although popular gateway areas have the highest likelihood for visitation, travelers are open to learning more about lesser known regions, an opportunity to stretch abundance and deliver the unexpected.*
- Cost and safety impact consideration and present a barrier to visitation.

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CA is widely known for family fun, abundance and scenery; there is room to strengthen premium image and emotional territories around lifestyle and uniqueness

California Imagery (Top 2 Box) by Country

Attributes ranked by quartile: 1st Quartile, 2nd Quartile, 3rd Quartile, 4th Quartile

High

Drivers to California Consideration

Low

	Brand					Mature				Growth	
	US	CA	UK	AU	JP	FR	DE	KR	MX	CN	BR
Worth paying more for than other travel destinations	44%	37%	42%	23%	37%	36%	54%	41%	41%	77%	40%
Is a place that is worth going to several times	75%	71%	66%	54%	46%	52%	61%	55%	75%	72%	56%
Is a place you feel safe and secure	43%	39%	34%	28%	29%	39%	35%	40%	61%	73%	45%
Is a place with a unique and desirable lifestyle	58%	58%	56%	39%	50%	53%	65%	42%	64%	77%	56%
Offers the best of everything in one place	68%	60%	54%	46%	36%	32%	42%	43%	71%	76%	52%
Offers unexpected experiences	66%	57%	52%	43%	41%	50%	60%	48%	67%	73%	59%
Is a place to indulge myself	72%	68%	68%	55%	50%	62%	60%	49%	79%	72%	51%
Is a place with limitless possibilities	76%	65%	59%	50%	38%	55%	59%	46%	71%	73%	59%
Is a place where I can be myself	67%	61%	56%	46%	39%	47%	46%	33%	71%	70%	59%
Is a place where people have a unique outlook on life	66%	58%	50%	42%	39%	34%	58%	37%	47%	74%	51%
Offers great family experiences	77%	74%	69%	64%	56%	54%	54%	63%	78%	72%	62%
Is a place with an abundance of offerings	83%	78%	76%	63%	60%	60%	71%	40%	84%	79%	62%
Is a place where music is part of the lifestyle/culture	70%	62%	51%	52%	41%	48%	54%	41%	65%	72%	53%
Is a place with cultural diversity	83%	66%	56%	50%	51%	56%	45%	53%	76%	79%	67%
Is a place with scenic beauty	84%	82%	74%	63%	67%	69%	66%	68%	74%	79%	72%

QB4. Now we'd like you to do something a bit different and imagine these destinations as if they were to come to life as people.

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Priorities are generally similar across markets; having a unique lifestyle is less important in China

Ranking of Drivers to Visitation – California

Ranking Legend
- Top ranked within country
- Lower ranked within country

	Brand					Mature				Growth	
	US	CA	UK	AU	JP	FR	DE	KR	MX	CN	BR
Is a place that is worth going to several times	1	1	3	3	2	1	1	2	1	1	1
Offers the best of everything in one place	2	3	11	2	7	7	3	13	11	3	4
Is a place you feel safe and secure	3	5	4	11	5	15	7	8	4	8	11
Is a place with a unique and desirable lifestyle	4	4	2	8	9	10	5	6	6	15	3
Is a place to indulge myself	5	7	9	4	6	9	12	5	7	4	15
Worth paying more for than other travel destinations	6	2	1	1	1	3	6	3	3	2	5
Is a place where I can be myself	7	8	12	5	8	12	2	10	9	9	13
Offers great family experiences	8	15	6	12	4	13	13	11	8	12	7
Is a place with an abundance of offerings	9	12	14	14	14	6	10	4	13	5	10
Is a place with limitless possibilities	10	13	8	15	3	2	4	9	14	6	2
Offers unexpected experiences	11	9	5	13	13	5	11	1	12	13	9
Is a place where music is part of the lifestyle/culture	12	14	13	9	10	4	14	12	10	7	12
Is a place with scenic beauty	13	10	10	6	11	11	15	15	15	14	6
Is a place with cultural diversity	14	6	7	10	12	8	8	14	5	11	14
Is a place where people have a unique outlook on life	15	11	15	7	15	14	9	7	2	10	8

Base: California: US (786), CA (773), UK (490), AU (497), JP (481), FR (487), DE (474), KR (423), MX (472), CN (463), BR (473)
QB6. How well would you say the statement below describes each state as a travel destination?

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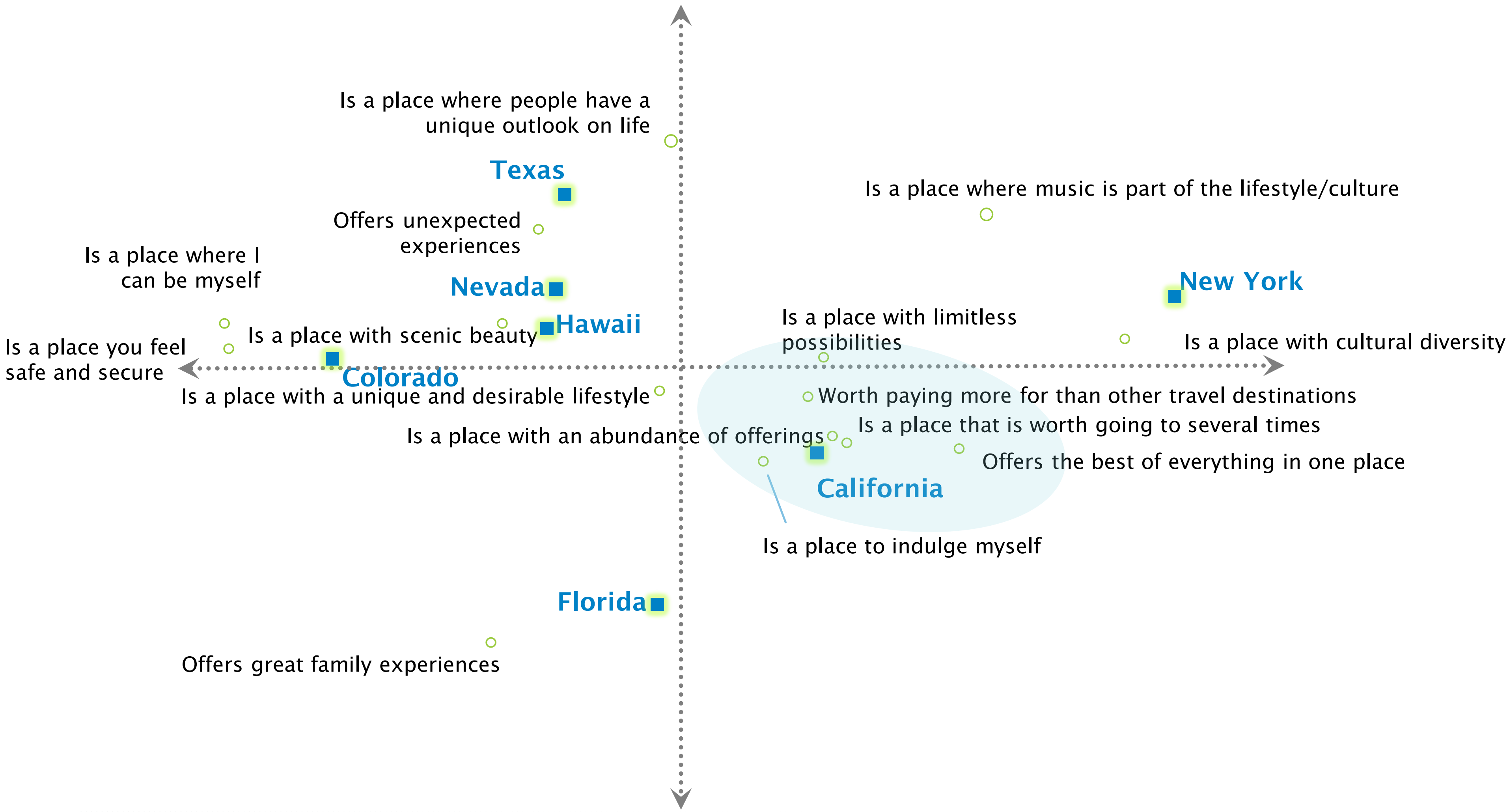
CA is associated with variety and multitude of offerings, while Florida is the family destination; lesser known states get credit for being unique and unexpected

Brand Imagery Perceptual Map – (All Country Average)



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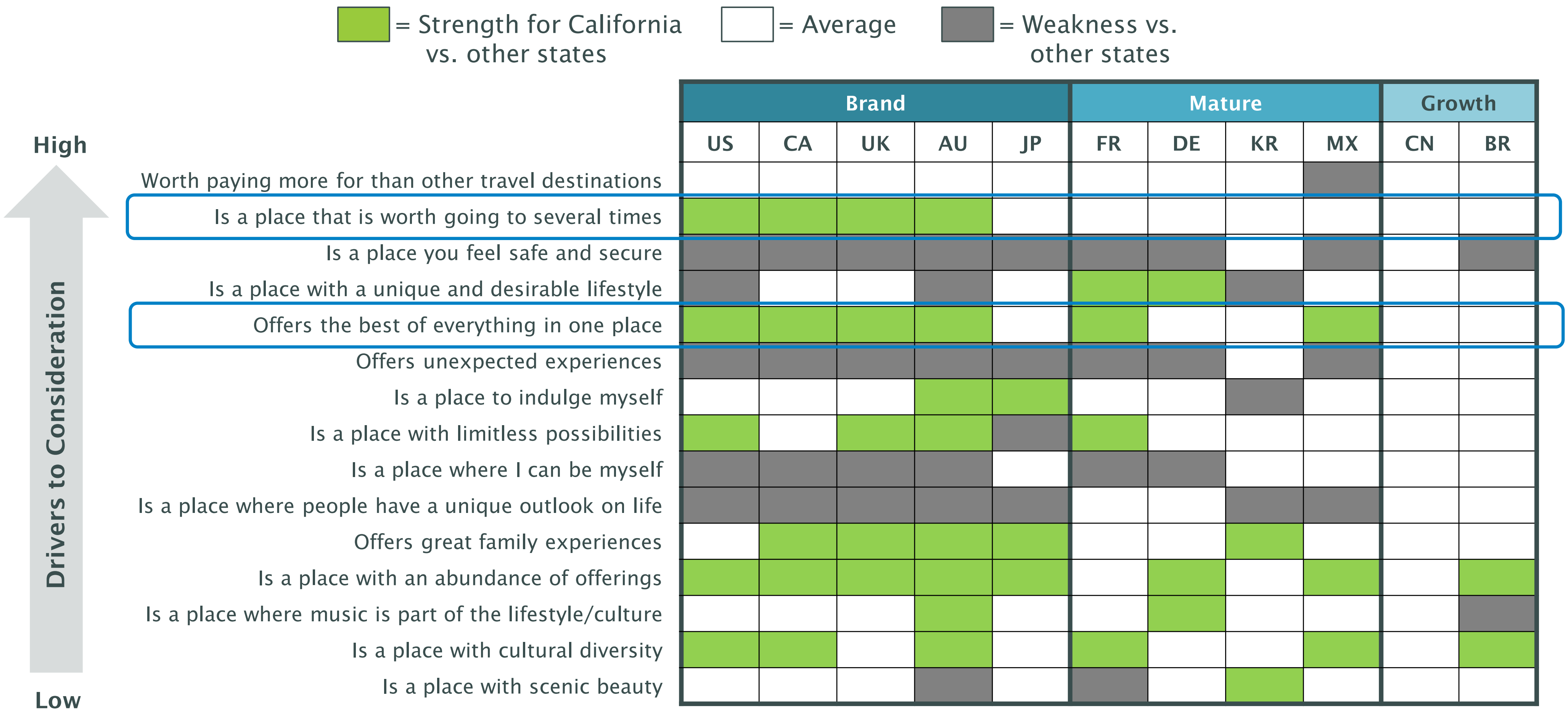
Relative to competitors, CA has leverage in Brand Markets which can help drive visitation; image is less developed in Mature and Growth markets

California Imagery (Top 2 Box) vs. Other States



QB6. How well would you say the statement below describes each state as a travel destination?

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Overall, CA's persona is seen as energetic, free spirited, fun and trendy

California Personality by Country

Attributes ranked by quartile:

1st Quartile
2nd Quartile
3rd Quartile
4th Quartile

	Brand					Mature				Growth	
	US	CA	UK	AU	JP	FR	DE	KR	MX	CN	BR
Adventurous	57%	56%	53%	44%	25%	30%	51%	31%	58%	33%	53%
Arrogant	31%	25%	20%	27%	11%	22%	16%	23%	28%	13%	14%
Boring	4%	4%	2%	3%	2%	4%	3%	9%	10%	5%	8%
Energetic	58%	60%	59%	62%	44%	51%	48%	56%	51%	61%	52%
Family oriented	48%	55%	44%	48%	22%	19%	31%	48%	74%	48%	38%
Free Spirited	59%	61%	56%	50%	45%	55%	38%	63%	50%	63%	47%
Fun	73%	77%	72%	72%	54%	52%	56%	57%	80%	56%	71%
Laid Back	37%	41%	47%	36%	31%	42%	55%	37%	44%	56%	63%
Predictable	19%	20%	13%	22%	5%	11%	16%	14%	33%	6%	22%
Self indulgent	46%	42%	42%	47%	20%	14%	27%	26%	60%	45%	22%
Sophisticated	42%	45%	33%	29%	27%	36%	34%	44%	46%	44%	53%
Superficial	47%	40%	38%	52%	6%	40%	24%	14%	36%	8%	19%
Trendy	68%	70%	63%	65%	28%	70%	55%	43%	47%	56%	58%
Unexpected	21%	22%	17%	15%	9%	26%	21%	36%	33%	24%	31%
Unique	38%	37%	26%	24%	19%	35%	46%	27%	39%	47%	37%
Welcoming	41%	56%	60%	47%	32%	53%	57%	48%	48%	57%	44%
Youthful	54%	55%	51%	57%	37%	64%	45%	52%	70%	44%	49%

QB4. Now we'd like you to do something a bit different and imagine these destinations as if they were to come to life as people.

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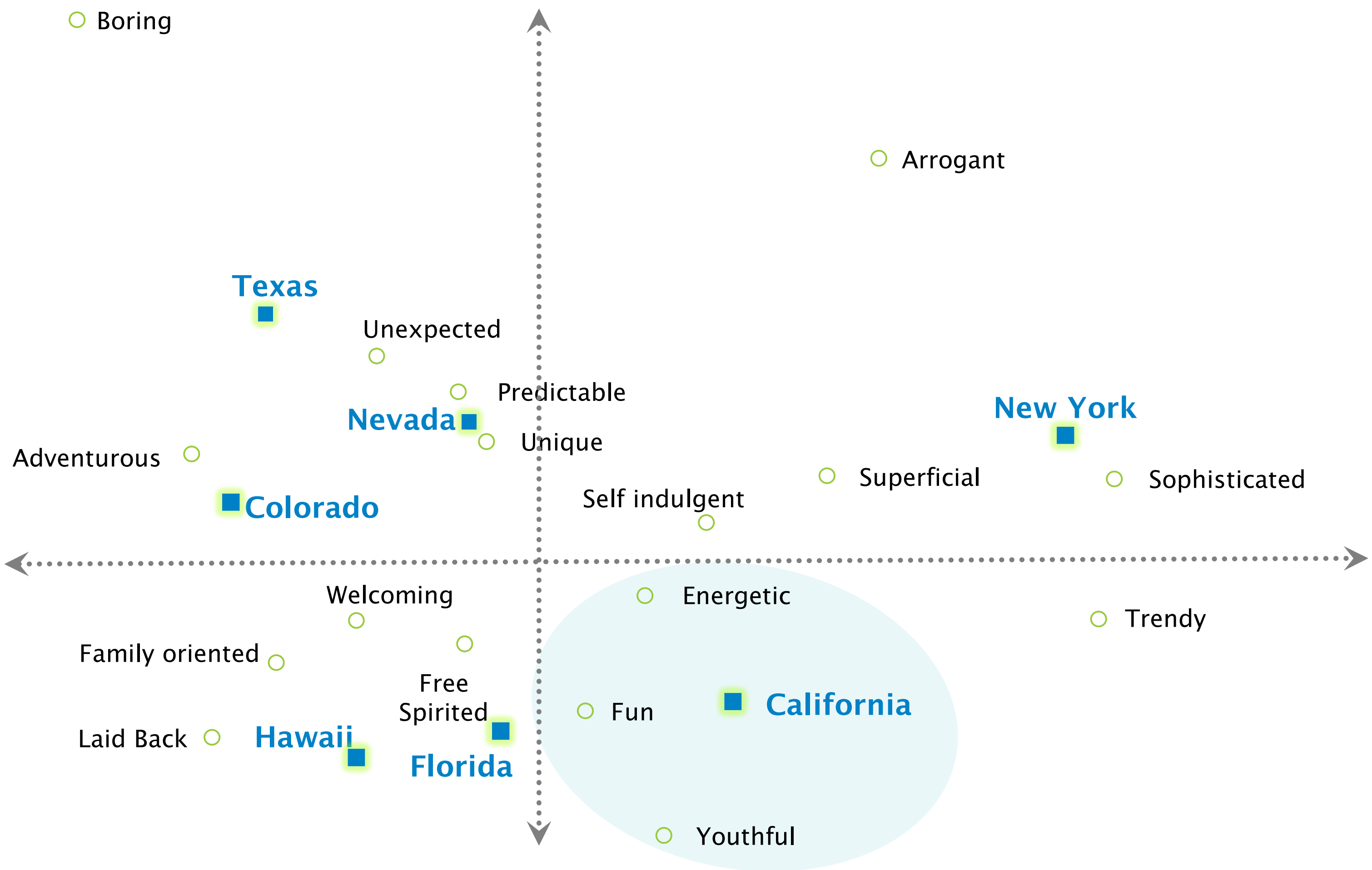
NY is defined by more negative associations (arrogant, superficial), Hawaii by it's laid back vibe and lesser known states by their uniqueness

Brand Personality Perceptual Map – (All Country Average)



QB4. Now we'd like you to do something a bit different and imagine these destinations as if they were to come to life as people.

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Overall, CA is perceived as delivering on a variety of assets, including culinary, outdoor, family and city offerings

California Brand Assets (Strong Associations vs. Other States)

✓ = Asset is a differentiating strength for CA vs. Other States

		Brand					Mature				Growth	
		US	CA	UK	AU	JP	FR	DE	KR	MX	CN	BR
Big City Entertainment	People / celebrities	✓	✓	✓	✓	✓	✓	✓		✓		✓
	Performing arts				✓		✓					
Family Fun	Theme/water parks	✓	✓	✓	✓	✓	✓	✓		✓		✓
	Zoos/ aquariums	✓	✓		✓		✓	✓		✓		
Outdoor Adventure	Surf	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓
	Beaches	✓	✓	✓	✓	✓	✓	✓	✓	✓		✓
Culinary	Wineries	✓	✓	✓	✓	✓	✓	✓		✓		✓
	Food/wine festivals	✓	✓	✓	✓	✓	✓		✓			✓
	Farms/ farmers' markets								✓			

Vacation Type Preference Ranked

Rest & Relaxation	49%
Big City Entertainment	37%
Family Fun	35%
Outdoor Adventure	25%
Culinary	24%
Off-the-beaten Path	23%

Only strong associations for CA shown. Does not include full attribute list.

Note: Attributes shown are strengths for California based on Expectancy Analysis.
QB2. Regardless of whether you've visited there or not, please tell us how you think each of these destinations deliver on the following attractions/amenities/activities?

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Rest & Relaxation is a preferred vacation type in most markets; big city and family oriented trips are highly considered in emerging markets

Vacation Type Consideration by Market

"It's my favorite type and the only one I would consider/ It's one I prefer and would always consider"

Ranking Legend
- Top ranked within country
- Lower ranked within country

	Brand					Mature				Growth	
	US	CA	UK	AU	JP	FR	DE	KR	MX	CN	BR
Rest & Relaxation activities such as visiting resorts, spas, beaches	54%	52%	47%	47%	52%	33%	48%	65%	39%	65%	37%
Family Fun activities such as theme parks, zoos, aquariums, water parks, beaches, museums, historical sites	35%	26%	22%	28%	35%	25%	29%	45%	46%	47%	46%
Outdoor Adventure activities such as visiting national/state parks, surfing, skiing, snowboarding, hiking, biking, whitewater rafting, boating, camping, fishing	29%	21%	16%	18%	23%	23%	25%	28%	23%	41%	26%
Big City Entertainment activities such as performing arts (plays/musicals/dance), museums, galleries, nightlife, live music events, sporting events, people watching/celebrity sightings, shopping	29%	30%	25%	34%	37%	25%	32%	45%	49%	55%	46%
Off-the-beaten Path activities such as visiting small towns, road trips, scenic byways	27%	20%	23%	18%	26%	26%	38%	9%	21%	17%	30%
Culinary activities such as visiting wineries, restaurants, food and wine festivals, farmers' markets, cooking classes	14%	11%	12%	20%	40%	15%	26%	37%	11%	57%	19%

Base: California: US (799), CA (800), UK (503), AU (507), JP (500), FR (500), DE (500), KR (500), MX (500), CN (500), BR (500)
QA7. We'd now like you to consider six different types of vacations. For each type, please let us know how likely you would be to take that type of vacation.

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Southern CA attractions are more motivating to developing markets while Northern attractions appeal to Brand markets

Top 5 Motivating Attractions

✓ = Ranked Top 5
[shaded] = Tie
Blue = Northern CA
Green = Southern CA

	Brand					Mature				Growth	
	US	CA	UK	AU	JP	FR	DE	KR	MX	CN	BR
San Francisco	✓	✓	✓	✓	✓	✓	✓		✓		✓
Disneyland	✓	✓		✓	✓			✓	✓	✓	✓
Hollywood				✓	✓		✓	✓	✓	✓	✓
Los Angeles					✓	✓	✓	✓	✓	✓	✓
Beaches	✓	✓					✓	✓		✓	✓
Yosemite/Half Dome	✓		✓	✓	✓	✓					
Napa Valley/Wineries		✓	✓						✓		
Universal Studios Hollywood				✓						✓	
California Redwoods	✓					✓					
Highway 1/California Coastline		✓ (tie)	✓ (tie)								
Golden Gate Bridge			✓				✓				
Death Valley/Deserts			✓ (tie)			✓					
San Diego		✓ (tie)									
Beverly Hills								✓			

Attractions not included in Top 5 for any country are not shown.

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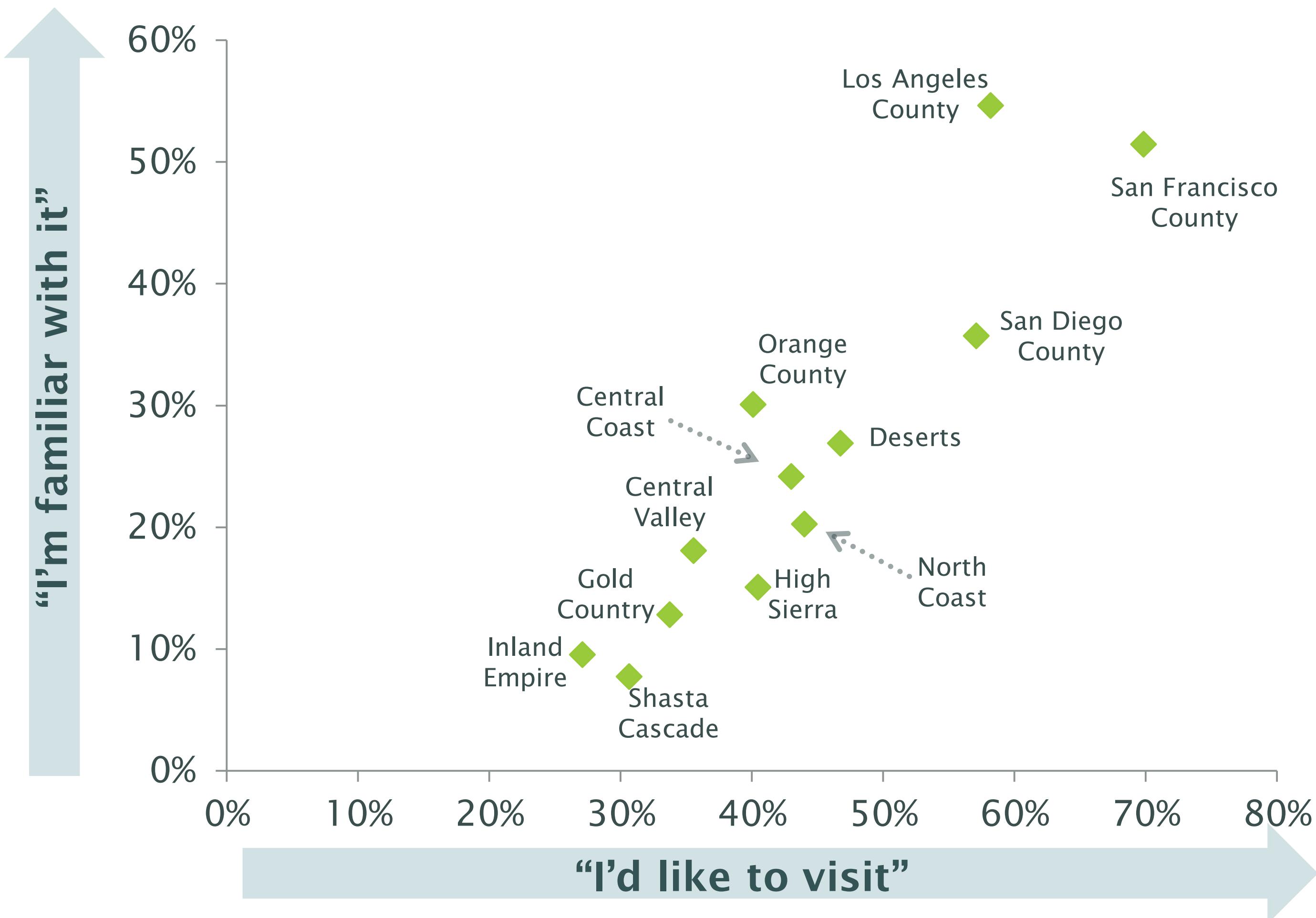
Gateway areas have strong familiarity and potential for visitation; travelers are open to learning about lesser known areas

California Regions - Familiarity and Visitation (All Country Average)



"I'd like to learn more"

(All country average)

Gold Country	50%
Shasta Cascade	49%
Central Valley	47%
Inland Empire	47%
High Sierra	47%
Central Coast	44%
North Coast	44%
Orange County	42%
Deserts	38%
San Diego County	34%
Los Angeles County	32%
San Francisco Bay Area	28%

QB9 Please indicate which of these areas you would like to visit/learn more about.
QB9a Please indicate how familiar you are with the areas shown on the map.

Stimulus shown to respondents is included in the Appendix on slide 41.

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In addition to gateways, Deserts and the North Coast have potential to inspire visitation

California Areas– "I'd like to visit" (Ranked by Country)

Numbers 1-12 indicate ranking
= High rank
= Low rank

	Brand					Mature				Growth	
	US	CA	UK	AU	JP	FR	DE	KR	MX	CN	BR
San Francisco Bay Area	1	1	1	1	1	1	1	4	1	2	2
San Diego County	2	2	3	3	3	4	4	3	2	5	2
North Coast	3	5	6	6	6	8	6	10	6	3	5
High Sierra	4	8	7	5	7	5	8	7	9	8	9
Central Coast	5	7	4	8	5	9	5	6	6	1	6
Los Angeles County	5	3	4	2	2	3	2	1	3	4	1
Orange County	7	5	8	6	9	12	6	2	5	11	8
Shasta Cascade	8	9	11	11	11	6	12	12	6	12	11
Gold Country	9	10	10	9	10	10	10	9	11	9	9
Deserts	10	4	2	4	4	2	3	8	4	10	4
Central Valley	11	11	9	10	8	11	9	5	9	5	6
Inland Empire	12	12	12	12	12	7	11	11	12	7	12

QB9 Please indicate which of these areas you would like to visit/learn more about.
QB9a Please indicate how familiar you are with the areas shown on the map.

Stimulus shown to respondents is included in the Appendix on slide 41.

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Cost and concerns over safety are among the top barriers to visiting CA; visas continue to be a concern in China and Brazil for around a third of travelers

Barriers to Visitation for California

= High rank   = Low rank

	Brand					Mature				Growth	
	US	CA	UK	AU	JP	FR	DE	KR	MX	CN	BR
Hotels, meals, transportation and other costs are too expensive	38%	34%	21%	23%	16%	21%	17%	39%	21%	23%	27%
It costs too much to get there	25%	24%	37%	33%	21%	40%	34%	46%	16%	26%	28%
Concerns over safety (terrorism, political unrest, crime, natural disasters)	22%	28%	23%	27%	23%	21%	24%	36%	26%	30%	28%
There are more interesting places to visit	21%	26%	19%	31%	32%	19%	17%	22%	27%	12%	25%
It's hard to get around within the state	18%	9%	7%	9%	12%	6%	6%	18%	10%	14%	12%
It takes too long to get there	17%	15%	23%	22%	22%	21%	29%	43%	7%	11%	16%
I'm overwhelmed by how big this state is	13%	10%	10%	5%	13%	3%	9%	20%	9%	9%	8%
Past experiences I've had there	12%	8%	4%	9%	3%	3%	5%	7%	11%	5%	9%
Lack of knowledge beyond major cities	9%	10%	12%	13%	13%	7%	10%	28%	13%	11%	15%
Opinions from family, friends and co-workers	7%	8%	5%	9%	4%	6%	9%	13%	15%	15%	13%
There is nothing new to experience	7%	6%	3%	7%	3%	5%	4%	7%	8%	10%	10%
I don't know enough about this state	6%	8%	10%	8%	10%	9%	10%	25%	10%	12%	18%
Concerns over visas & security screening	n/a	9%	23%	18%	8%	21%	24%	21%	28%	27%	32%
It's difficult for me to communicate with locals given the language barrier	n/a	n/a	n/a	n/a	10%	4%	8%	33%	8%	19%	13%

QB7. Which of the following would prevent you from visiting these destinations?

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Consumer Decision Journey

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Summary of Findings – Consumer Decision Journey

- Television is the top source of awareness for California across all markets, with print and websites being secondary sources.
- Search engines and websites dedicated to the destination are widely used. Word of mouth from family/friends and reviews from other travelers are also influential.
- Touchpoints are most critical to the information gathering stage of the decision journey and play much smaller role in the final decision, when other factors likely come into play.

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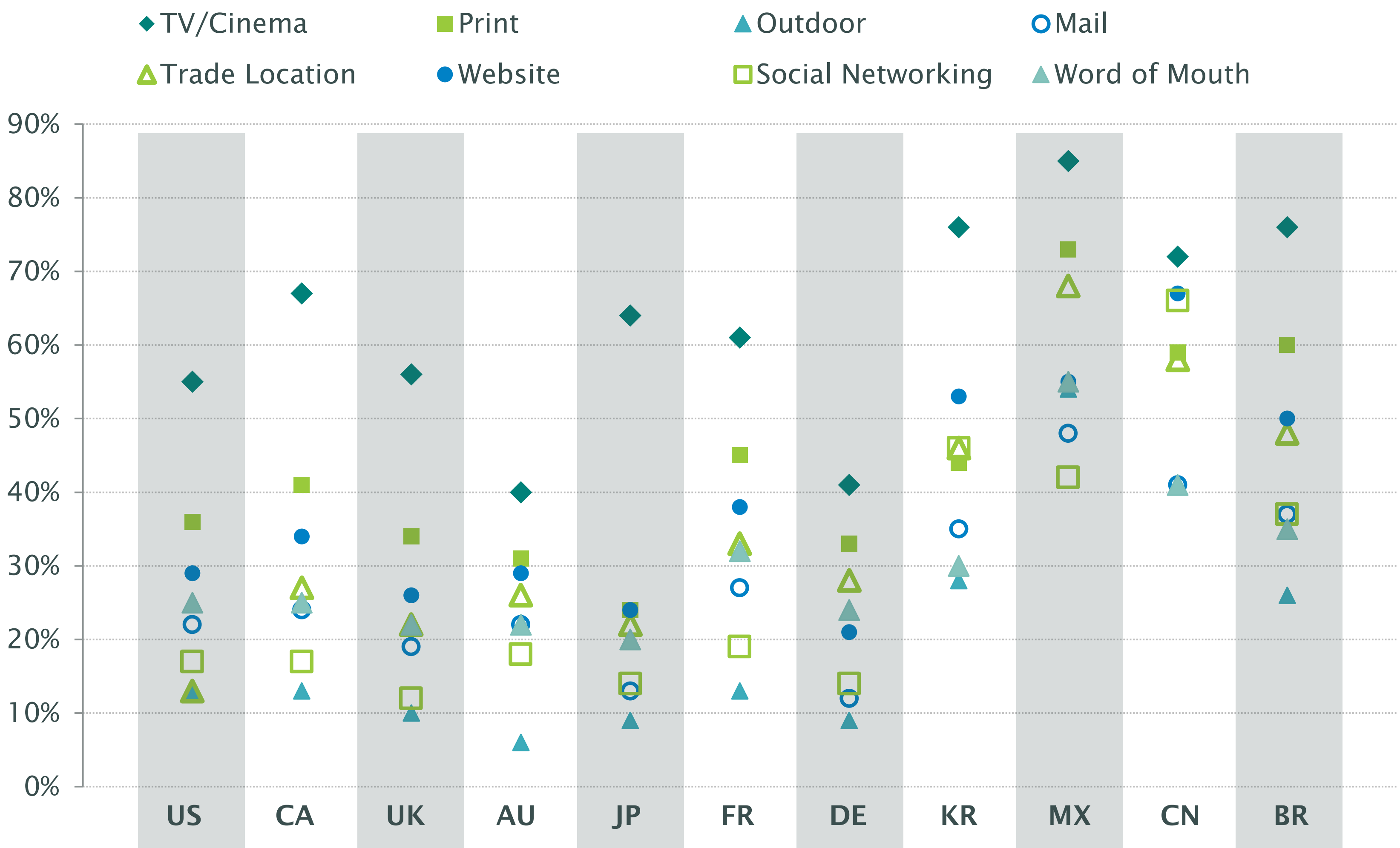
TV/Cinema is the top source of awareness in all markets followed by print; websites and social media are top sources in China and South Korea

Sources of Awareness



QC1. Where have you recently seen, heard or read about these destinations?

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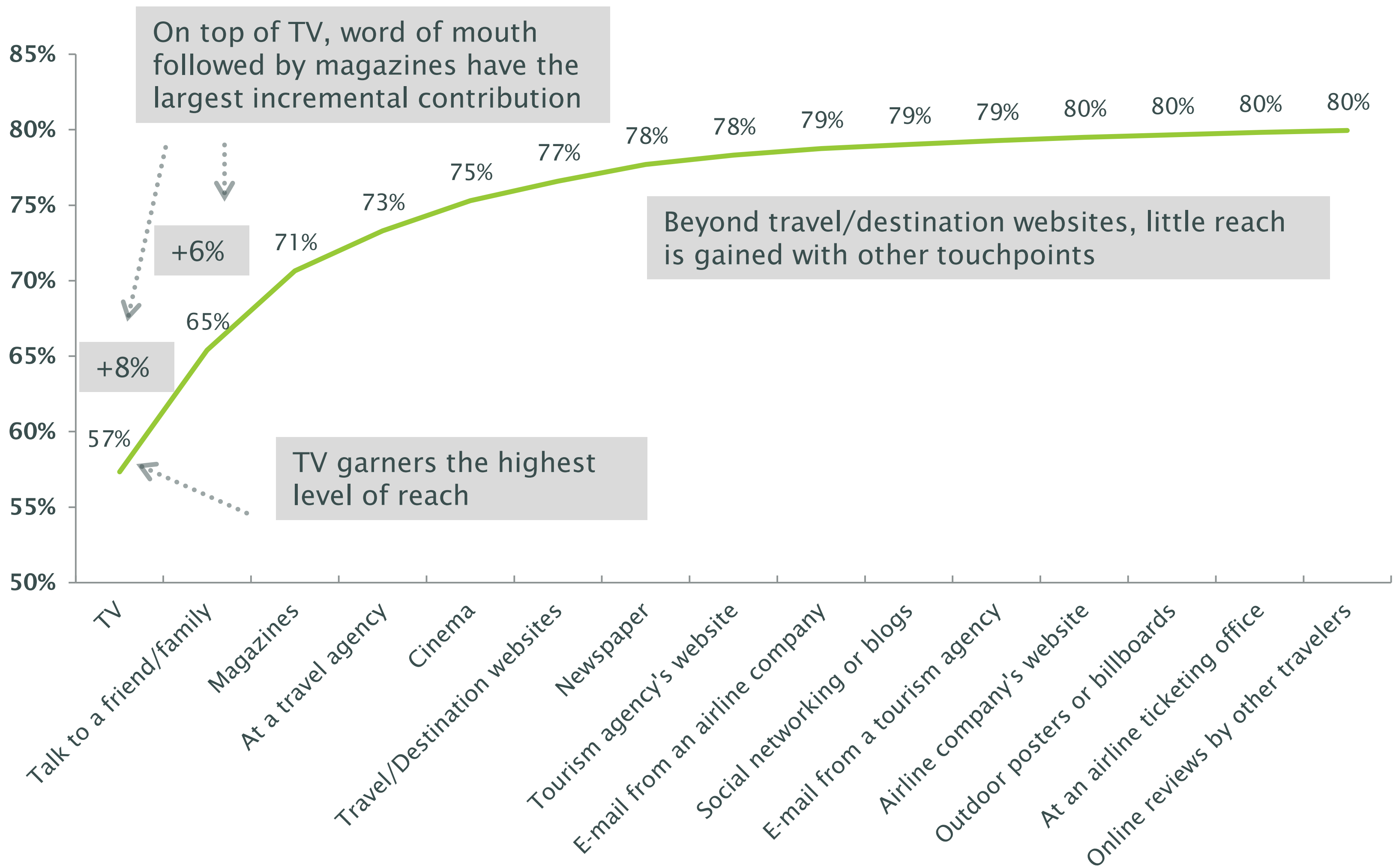
Television achieves the highest reach; word of mouth and magazines help maximize levels

TURF Analysis – Incremental Contribution Per Source of Awareness



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Online touchpoints and word of mouth are popular and influential in the research process

Research Touchpoints – "Use and are Influential"

= Above average within country

	Brand					Mature				Growth	
	US	CA	UK	AU	JP	FR	DE	KR	MX	CN	BR
Online											
Search engine	65%	64%	67%	68%	55%	59%	n/a	60%	61%	63%	64%
Destination website	62%	63%	66%	67%	45%	64%	41%	49%	61%	63%	64%
Online travel agency/consumer reviews	46%	58%	57%	61%	32%	44%	29%	47%	53%	62%	58%
Travel supplier website	45%	50%	50%	51%	55%	45%	35%	43%	57%	56%	52%
Travel discounter website	37%	40%	26%	32%	34%	55%	31%	26%	47%	44%	51%
Social networking site	16%	13%	8%	11%	22%	14%	13%	36%	28%	55%	25%
Chat room/discussion board/blog	12%	12%	5%	12%	15%	19%	9%	35%	10%	47%	18%
Offline											
Family/friends who've visited/are familiar	53%	45%	42%	50%	40%	48%	38%	55%	44%	58%	46%
Visitor's guide	35%	30%	34%	29%	39%	30%	41%	25%	22%	42%	29%
Travel book	35%	34%	45%	41%	60%	57%	39%	47%	25%	55%	37%
Magazine/newspaper	35%	32%	37%	40%	34%	36%	24%	32%	31%	51%	49%
TV program/news story	28%	28%	36%	36%	39%	38%	36%	40%	27%	58%	48%
Travel agent	13%	20%	20%	33%	39%	26%	31%	31%	30%	32%	42%
Travel convention	6%	7%	4%	10%	26%	8%	9%	10%	9%	35%	14%

QC2. Which of these resources do you use while researching leisure trips and of those used, how influential are they in your decision making process?

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Touchpoints spark awareness and provide information but few agree that they impact the final decision

Touchpoints Across Decision Journey (All Country Average)

1 Becoming aware

Search engine	47%
Destination website	41%
TV program/news story	39%
Magazine/newspaper	38%

2 Gathering information & narrowing down options

Online travel agency/consumer reviews	54%
Destination website	54%
Search engine	54%
Travel supplier website	51%
Family/friends who've visited/are familiar	48%
Travel discounter website	45%
Magazine/newspaper	44%
Read a travel book	42%

3 Making final decision

Travel supplier website	26%
Destination website	23%
Travel discounter website	21%
Family/friends who've visited/are familiar	20%
Travel agent	20%

Average # of Sources Used	4	6	2

Fewer sources are used for final decisions given the role of other factors (i.e. cost, sudden deals, weather, etc.)

** Only top tier sources shown. Does not include full list.*

QC7. Now we'd like to know which sources you rely on at each phase of the decision making process.

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