



Canada

Fall 2016

# Advertising Awareness Report

January 2017

# Contents

| Section                 | Page |
|-------------------------|------|
| Background & Objectives | 3    |
| Methodology             | 4    |
| Insights                | 5    |
| Canada Economic Climate | 6    |
| Advertising Campaign    | 7    |
| Image & Positioning     | 9    |
| Advertising Recall      | 15   |
| Creative Ratings        | 24   |
| Advertising Impact      | 31   |
| Appendix: Questionnaire | 38   |

# Background & Objectives

- In fall 2016, Visit California (VCA) ran national TV, digital, and print advertising in Canada.
- The TV effort includes the new brand spot “Average Joes” and the family spot “Kids Unplugged.”
- The digital advertising includes banners, video, and native content. The specific digital campaigns are “Dream365TV/CA Dreamers,” “Come True,” “Dream Eater,” and Super Affluent.
- VCA partners with Strategic Marketing & Research Insights to conduct research that measures the level of advertising awareness and reaction to the creative.
- The research gathers insights to assist VCA in refining future marketing efforts in Canada.

# Methodology

- The survey was conducted online, with actual advertising shown to measure advertising recall.
- The interviews were collected from December 22<sup>nd</sup> to 30<sup>th</sup>, 2016.
- In total, 1,289 surveys were completed in the three Canadian regions.
- Respondents qualified by being at least 18 years old, have taken a leisure trip to the U.S. in the past 2 years or are likely to visit in the next 2 years, and are involved in the travel decision-making process in their household.
- 339 respondents were categorized as the Culinary target audience.
- 365 respondents were categorized as the Family target audience.
- 63 respondents were categorized as the Super Affluent target audience.

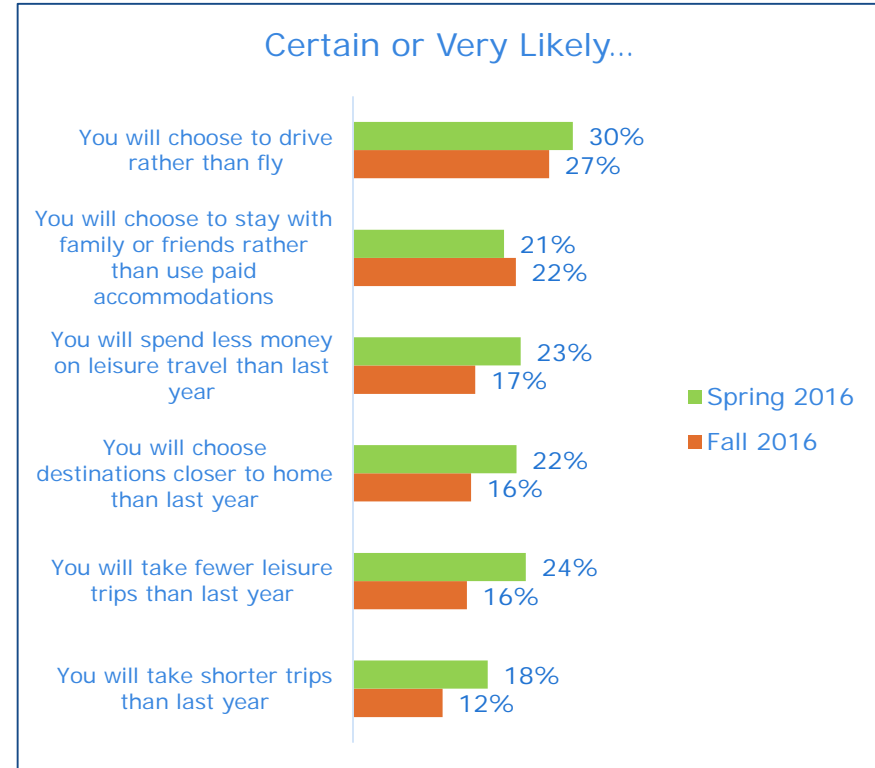
| Region   | Completed Surveys |
|--|-------------------|
| Western Canada<br>(Vancouver, Edmonton, Calgary) | 381               |
| Toronto  | 408               |
| Remaining  | 500               |
| <b>Total</b>                                     | <b>1,289</b>      |

# Insights

- The 2016 fall Canada campaign reached 60% of Canadian households (about 5.7 million) with relative efficiency. VCA spent \$0.12 to reach a Canadian household with the fall 2016 campaign, marking a gain in efficiency compared to the fall 2015 campaign (\$0.14) and the spring 2016 campaign (\$0.22).
- The Average Joes brand TV/OTV spot is the primary awareness builder, while the more highly targeted campaigns aimed at specific audiences such as Kids Unplugged and Dream Eater provide support and generate impact on perceptions and interest in visiting California.
- In general, influencing perceptions and interest is dependent upon generating awareness of multiple campaigns. Awareness of four or five campaigns is where the most notable lift is realized. This reliance on campaign overlap is exacerbated by a weak Canadian dollar and the resultant change in leisure travel behaviors, including an overall decline in interest.
- Lower interest in U.S. leisure travel is evidenced by declining top-of-mind awareness of California and competitor destinations. Other evidence includes the fact that notable portions of Canadians indicate that they will alter their travel plans, such as choosing to drive rather than fly and spending less on their leisure trips.
- The California brand is well-established in Canada, and California is on par with Hawaii for being the preferred U.S. destination if time and money were not considerations.
- The brand TV ad and the other campaigns receive mostly positive reactions and generally rate in the top 10% benchmark range for communicating specific messages. The campaigns tend to receive stronger ratings among the intended target segment. The exception is the Super Affluent advertising, which receives a lower proportion of positive responses among the Affluent target as compared to the overall audience. The Affluent consumer is more difficult to “impress,” but this result highlights the opportunity to explore how to make the ads more appealing to a more discerning target segment.

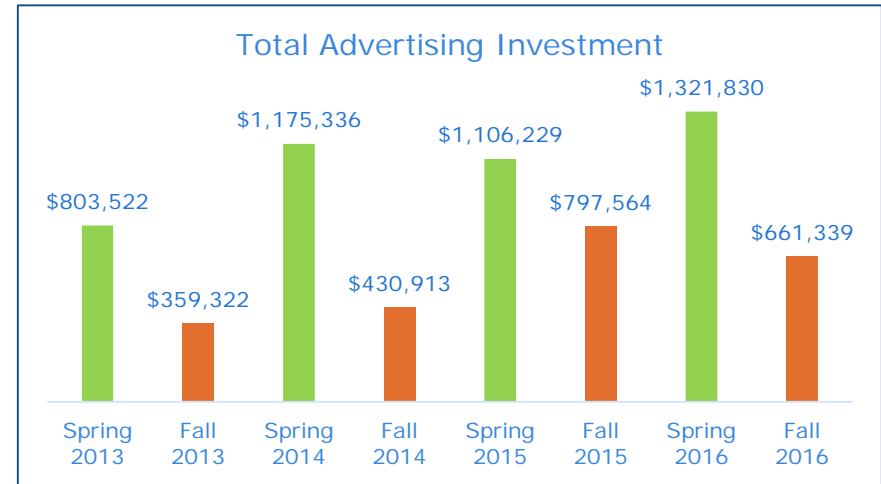
# Canada Economic Climate

- The Canadian dollar has weakened over the past few years, causing some Canadians to rethink their leisure travel plans.
- Compared to the spring 2016 research results, this fall 2016 research shows that the percentage of Canadian consumers indicating that they will alter their travel plans has declined, while the economic situation has not changed notably. Still, the economy is influencing travel plans for a potentially impactful portion of Canadian consumers.
- The difference could be driven by seasonality, as Canadian consumers in December (when the fall research was conducted) are likely excited to travel away from their cold climate. Spring and fall 2016 are the only two available data points, so this hypothesis will be tested in upcoming research waves.



# Advertising Campaign

- In 2016, VCA again spent fewer advertising dollars in the fall wave than in the spring wave.
- In total, VCA spent about \$661,000 on the fall 2016 Canada advertising campaign. This is a smaller investment than in fall 2015, but a larger investment than the 2013 and 2014 fall advertising waves.
- TV/OTV received the largest portion of the fall 2016 investment, as it has in previous fall advertising waves.
- The fall 2016 advertising includes Average Joes TV, Kids Unplugged TV, Dream365TV/CA Dreamers digital, Come True foundational digital, Dream Eater digital, and super affluent print, digital banners, and digital video. The inventory of campaigns/media with impressions and spending is provided on the following slide.



|              | Fall 2013        | Fall 2014        | Fall 2015        | Fall 2016        |
|--------------|------------------|------------------|------------------|------------------|
| TV/OTV       | \$354,322        | \$346,562        | \$688,564        | \$456,690        |
| Digital      | \$5,000          | \$84,351         | \$109,000        | \$204,649        |
| <b>Total</b> | <b>\$359,322</b> | <b>\$430,913</b> | <b>\$797,564</b> | <b>\$661,339</b> |

# Advertising Campaign

- VCA delivered just shy of 200 million impressions with the fall 2016 Canada advertising campaign.
- The Average Joes TV and OTV advertising received the largest investment.

| Fall 2016 Canada Advertising                 | Fall 2016 Impressions | Fall 2016 Spending |
|--|-----------------------|--------------------|
| Average Joes TV                              | 50,764,000            | \$166,790          |
| Average Joes OTV                             | 14,055,550            | \$140,799          |
| Kids Unplugged TV                            | 18,492,600            | \$77,710           |
| Kids Unplugged OTV                           | 5,142,753             | \$71,391           |
| Dream365TV Native                            | 3,103,009             | \$17,267           |
| Dream365TV YouTube                           | 1,125,131             | \$20,917           |
| California Dreamers Native                   | 6,145,482             | \$34,212           |
| California Dreamers YouTube                  | 681,405               | \$17,272           |
| Come True Foundational Native                | 10,762,278            | \$23,382           |
| Come True Foundational Digital Display       | 87,736,635            | \$55,087           |
| Dream Eater Native                           | 67,815                | \$13,255           |
| Dream Eater YouTube                          | 395,673               | \$12,484           |
| Super Affluent Print, Digital Banners, Video | 684,019               | \$10,773           |
| <b>Total</b>                                 | <b>199,156,350</b>    | <b>\$661,339</b>   |





# Image & Positioning

# Top of Mind Awareness

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

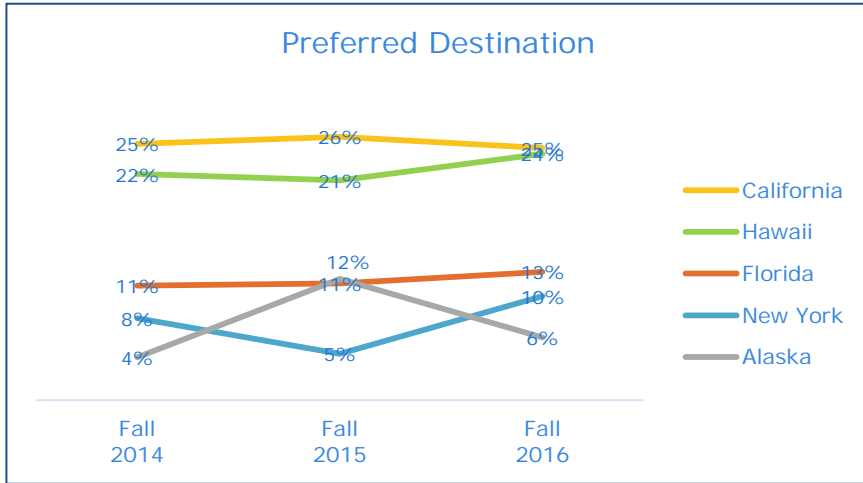


|                              | Spring 2016 | Fall 2016 |
|------------------------------|-------------|-----------|
| New York                     | 57%         | 52%       |
| Florida Total                | 55%         | 49%       |
| California Total             | 57%         | 41%       |
| Florida (state)              | 41%         | 39%       |
| California (state)           | 35%         | 27%       |
| California Destination Total | 35%         | 16%       |
| Las Vegas                    | 22%         | 15%       |
| Florida Destination          | 16%         | 12%       |
| Hawaii                       | 14%         | 11%       |
| Los Angeles                  | 14%         | 10%       |
| Texas                        | 10%         | 10%       |
| Arizona                      | 10%         | 9%        |
| San Francisco                | 9%          | 6%        |

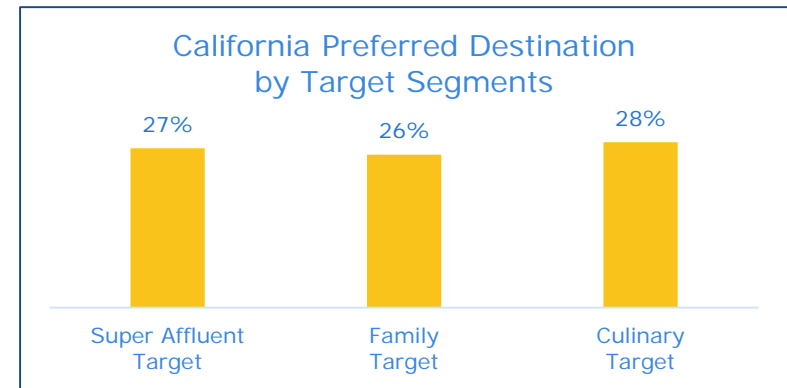
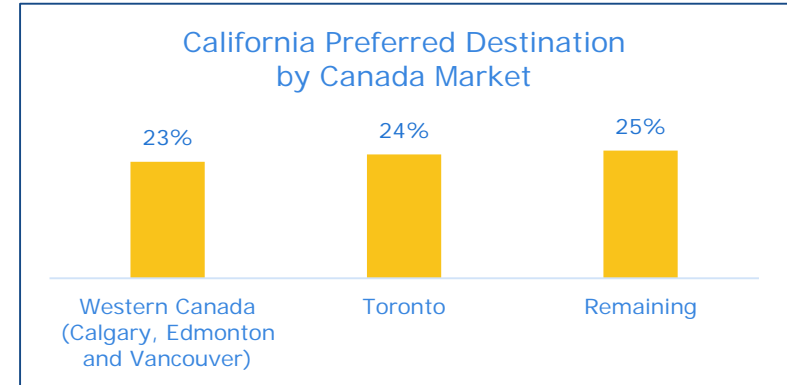
| Top-of-Mind Awareness        | Super Affluent | Family | Culinary |
|------------------------------|----------------|--------|----------|
| New York                     | 56%            | 55%    | 58%      |
| Florida Total                | 45%            | 50%    | 50%      |
| California Total             | 55%            | 42%    | 42%      |
| Florida                      | 38%            | 39%    | 38%      |
| California                   | 33%            | 28%    | 27%      |
| California Destination Total | 27%            | 16%    | 17%      |
| Las Vegas                    | 19%            | 17%    | 14%      |
| Florida Destination          | 7%             | 14%    | 14%      |
| Hawaii                       | 21%            | 10%    | 10%      |
| Los Angeles                  | 21%            | 11%    | 11%      |
| Texas                        | 6%             | 10%    | 13%      |
| Arizona                      | 4%             | 5%     | 4%       |
| San Francisco                | 7%             | 5%     | 6%       |

- In total, 41% of Canadian consumers mentioned California when asked which U.S. states or cities come to mind as travel destinations.
- This fall 2016 California top-of-mind measure is down compared to spring 2016 (57%), but we see declines for all states/destinations. The drops are likely driven by seasonality, as in December consumers have likely not yet begun spring/summer travel planning. The weak Canadian dollar is also playing a role by diminishing interest and intent in U.S. travel.
- California top-of-mind is highest among the Super Affluent target audience.

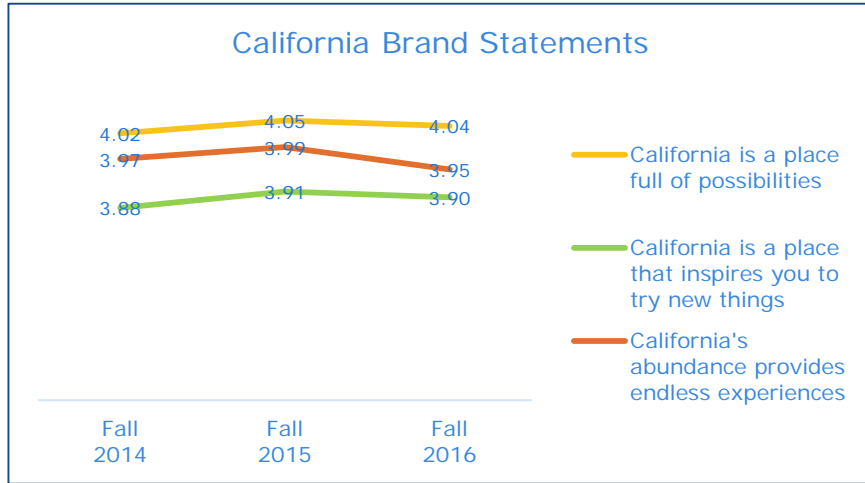
# Destination Preference



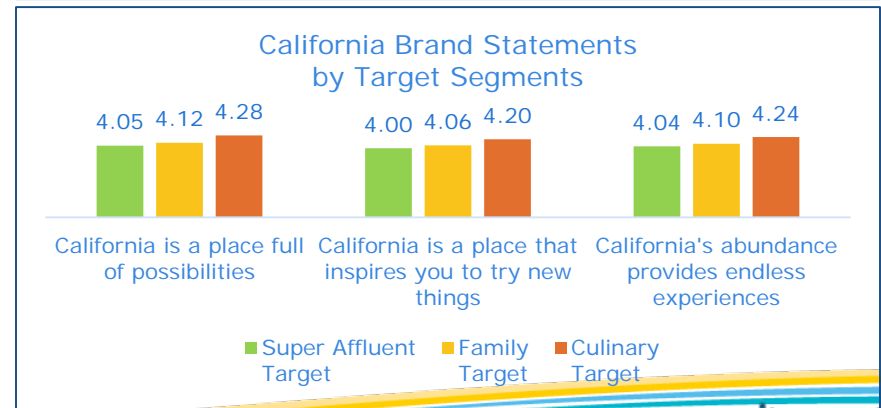
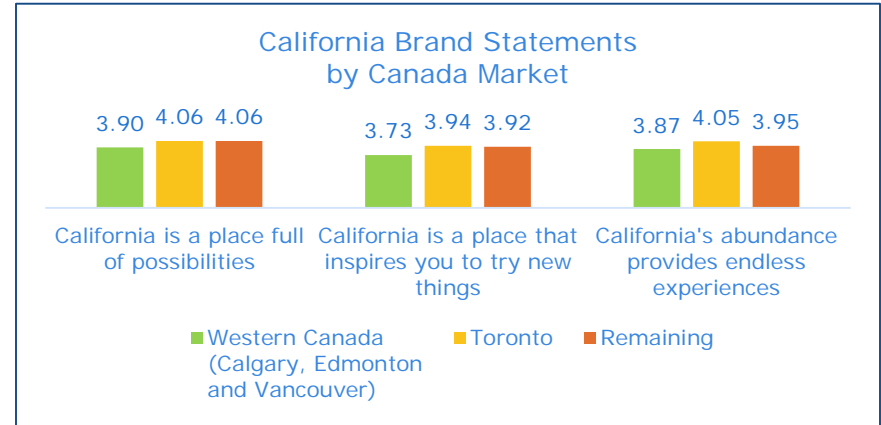
- If time and money were not considerations, Canadian consumers would most like to visit California and Hawaii.
- This measure of preference for California has been stable over time, and does not differ significantly by Canadian market or by target segment.
- The notable change here is that Hawaii and California are equal in the most recent wave.



# Brand Statements



- VCA has been successful in building the California brand in Canada. The brand statements are either in the top 10% industry benchmark range (4.0 or higher) or above the top 25% benchmark (3.8). The brand statement ratings have been fairly stable over the last three fall research waves.



# Product Statements

- California's strongest perceptions among Canadians include *variety, urban experiences, scenery, Hollywood, and beaches.*
- The Family and Culinary target segments are more positive than the Super Affluent target about California. The Super Affluent target is more difficult to impress.

| Fall 2016 California Top 2 Box Rating for...  | Overall | Super Affluent | Family | Culinary |
|---|---------|----------------|--------|----------|
| Is a place with lots to see and do  | 83%     | 77%            | 86%    | 86%      |
| Has large cities with exciting urban experiences - nightlife, shopping, dining and theatre                      | 82%     | 77%            | 83%    | 85%      |
| Is scenic and beautiful   | 82%     | 77%            | 81%    | 88%      |
| A place where celebrity and Hollywood are part of the culture   | 82%     | 78%            | 84%    | 87%      |
| Has excellent beaches   | 80%     | 74%            | 83%    | 84%      |
| Has a variety of active outdoor activities – hiking, climbing, biking, golfing, boating, surfing, fishing, etc. | 78%     | 81%            | 78%    | 83%      |
| Offers laid-back luxury (high end resorts, spas, etc.)  | 77%     | 76%            | 80%    | 81%      |
| Has many unique vacation experiences in one   | 75%     | 63%            | 76%    | 83%      |
| Has great variety in music events, concerts and festivals   | 75%     | 64%            | 72%    | 81%      |
| Has picturesque national and state parks  | 73%     | 71%            | 75%    | 82%      |
| Is a place where culinary experiences (food, wine, craft beer, are part of the culture/lifestyle                | 72%     | 61%            | 73%    | 81%      |
| Is culturally diverse   | 71%     | 68%            | 73%    | 83%      |
| Is the ultimate family playground with an abundance of family activities, theme parks and attractions           | 65%     | 69%            | 72%    | 71%      |
| Has interesting historic and cultural sites   | 63%     | 63%            | 66%    | 78%      |
| Has great professional sporting events  | 58%     | 56%            | 61%    | 69%      |
| Has many quaint towns and off the beaten path experiences   | 54%     | 52%            | 56%    | 68%      |
| Has lakes for boating & fishing   | 52%     | 53%            | 57%    | 64%      |
| Is worth paying more to visit   | 44%     | 62%            | 54%    | 65%      |
| Provides a good value for the money   | 38%     | 39%            | 48%    | 56%      |
| Is a good place for snow sports   | 21%     | 29%            | 28%    | 37%      |

# Attitude/Emotional Statements

- The fact that the statement with the most widespread agreement is *dream big* is further evidence that VCA has successfully built the California brand in Canada.
- Again we see the Family and Culinary target segments rating California relatively well on these statements.

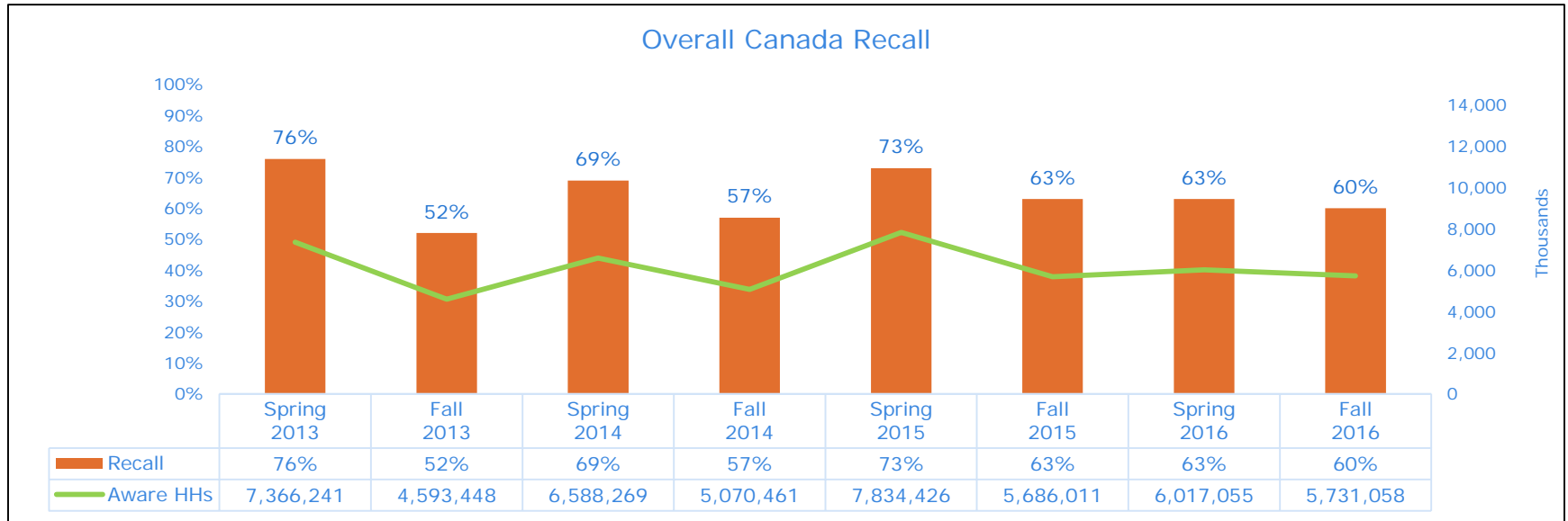
| Fall 2016 California Top 2 Box Rating for...   | Overall | Super Affluent | Family | Culinary |
|--|---------|----------------|--------|----------|
| A place where people are inspired to dream big | 76%     | 71%            | 78%    | 82%      |
| Free spirited                                  | 73%     | 71%            | 75%    | 84%      |
| A place where people live life to the fullest  | 71%     | 68%            | 76%    | 83%      |
| Youthful                                       | 70%     | 70%            | 75%    | 81%      |
| Offers the best of everything in one place     | 59%     | 59%            | 68%    | 76%      |
| A place where I can be myself                  | 59%     | 67%            | 63%    | 75%      |
| Casual and laid-back                           | 59%     | 66%            | 64%    | 68%      |
| A place that doesn't take itself too seriously | 47%     | 46%            | 50%    | 62%      |



# Advertising Recall

# Overall Recall & Aware Households

- 2016 fall advertising awareness is comparable to or higher than previous fall waves – and only slightly lower than the spring 2016 awareness level.





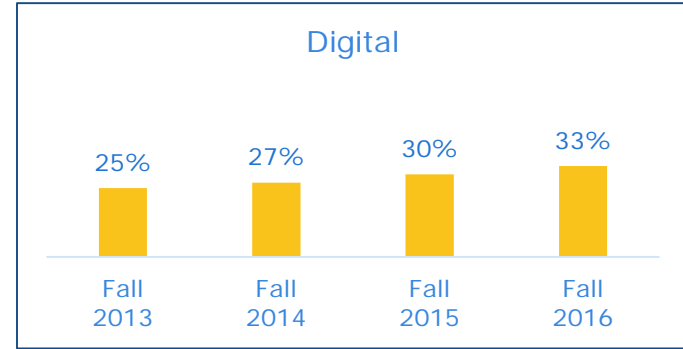
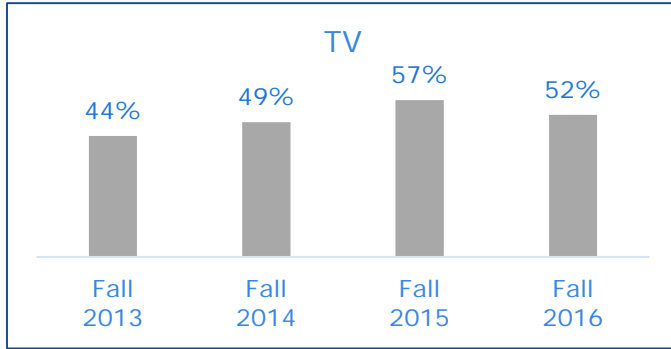
# Cost per Aware Household

|                                 | Spring 2013   | Fall 2013     | Spring 2014   | Fall 2014     | Spring 2015   | Fall 2015     | Spring 2016   | Fall 2016     |
|---------------------------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
| Any Ad Recall                   | 76%           | 52%           | 69%           | 57%           | 73%           | 63%           | 63%           | 60%           |
| Ad Aware Households             | 7,366,241     | 4,593,448     | 6,588,269     | 5,070,461     | 7,834,426     | 5,686,011     | 6,017,055     | 5,731,058     |
| Advertising Investment          | \$803,522     | \$359,322     | \$1,175,336   | \$430,913     | \$1,106,229   | \$797,564     | \$1,321,830   | \$661,339     |
| <b>Cost per Aware Household</b> | <b>\$0.11</b> | <b>\$0.08</b> | <b>\$0.18</b> | <b>\$0.08</b> | <b>\$0.14</b> | <b>\$0.14</b> | <b>\$0.22</b> | <b>\$0.12</b> |

- VCA spent \$0.12 to reach a Canadian household with the fall 2016 advertising.
- The VCA Canada advertising continues to have a relatively efficient reach compared to the industry benchmark of \$0.48.



# Recall & Cost per Aware Household by Medium



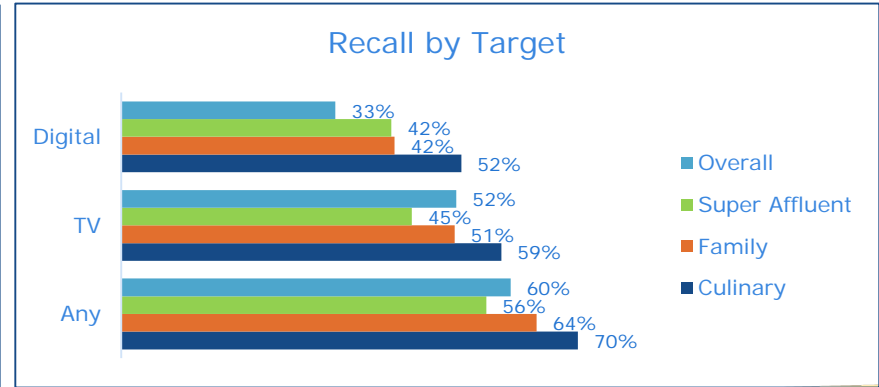
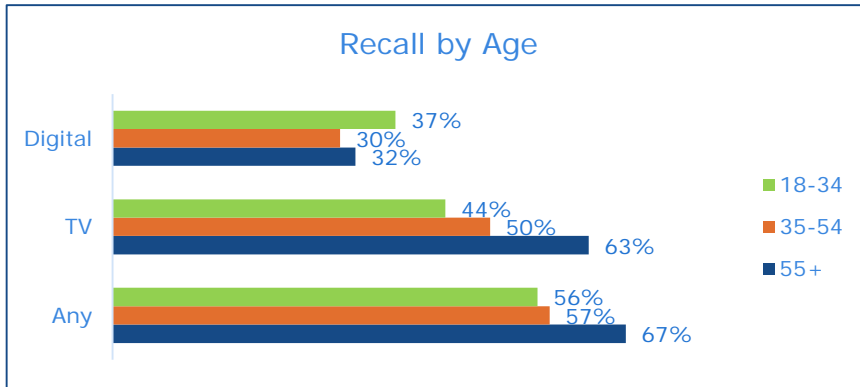
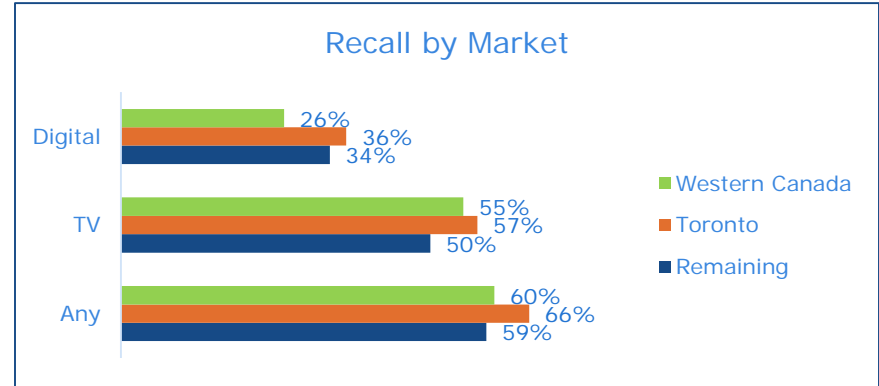
| TV                          | Fall 2013 | Fall 2014 | Fall 2015 | Fall 2016 |
|-----------------------------|-----------|-----------|-----------|-----------|
| TV Ad Recall                | 44%       | 49%       | 57%       | 52%       |
| TV Ad Aware Households      | 3,923,906 | 4,373,021 | 5,144,486 | 4,932,959 |
| TV Advertising Investment   | \$354,322 | \$346,562 | \$688,564 | \$456,690 |
| Cost per TV Aware Household | \$0.09    | \$0.08    | \$0.13    | \$0.09    |

| Digital                          | Fall 2013 | Fall 2014 | Fall 2015 | Fall 2016 |
|----------------------------------|-----------|-----------|-----------|-----------|
| Digital Ad Recall                | 25%       | 27%       | 30%       | 33%       |
| Digital Ad Aware Households      | 2,209,572 | 2,425,238 | 2,707,624 | 3,152,027 |
| Digital Advertising Investment   | \$5,000   | \$84,351  | \$109,000 | \$204,649 |
| Cost per Digital Aware Household | \$0.002   | \$0.03    | \$0.04    | \$0.06    |

- Compared to the previous fall wave, TV ad awareness is down slightly, and digital ad awareness is up slightly, moving with changes in media allocation.
- Both media are reaching Canada households efficiently.

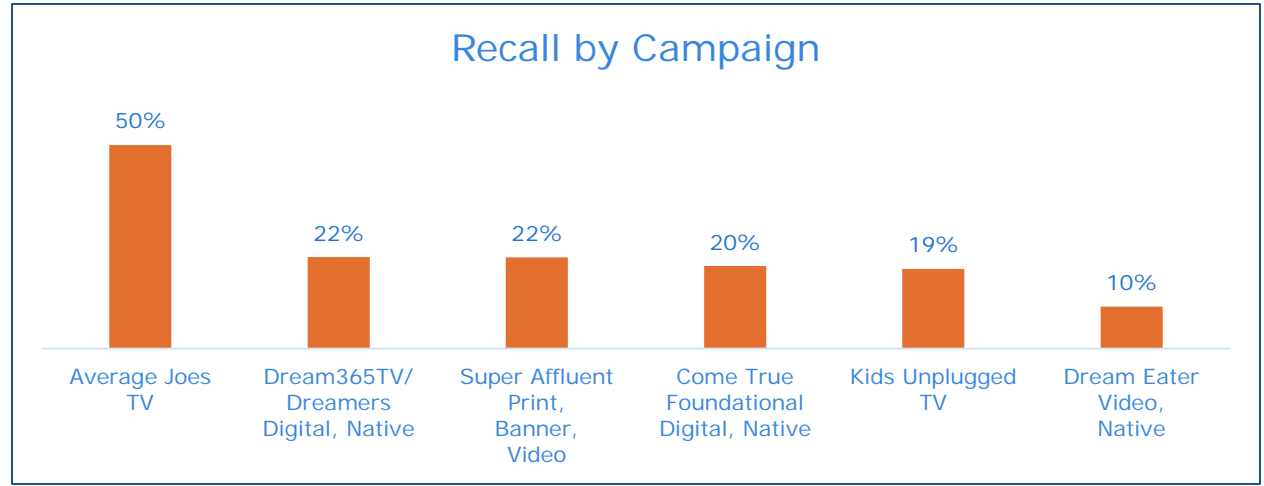
# Recall by Medium by Segments

- Ad awareness across media and overall is higher in Toronto than in the other two markets.
- The young audience has relatively high awareness of digital advertising and relatively low awareness of TV.
- The Super Affluent target has relatively high awareness of digital advertising, which is the medium used for the ads targeted at this group.
- In general, the Family and Culinary targets have the highest ad awareness.



# Recall & Cost per Aware Household by Campaign

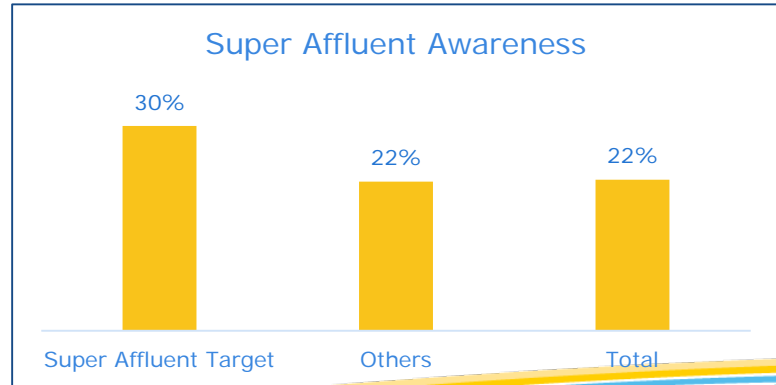
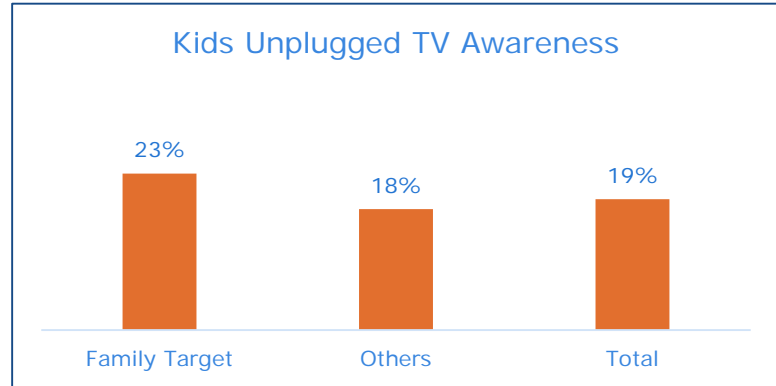
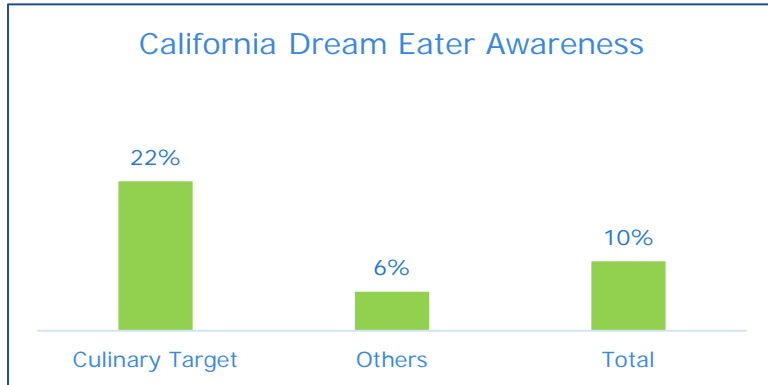
- The brand TV campaign reached half of Canadian households. The other, more highly targeted campaigns have lower awareness, but similarly efficient cost to reach a household. We will see later that these more targeted campaigns are critical for generating ad impact, while the brand spot's role is that of the awareness generator.



|                                 | Average Joes TV | Dream365TV/Dreamers Digital, Native | Super Affluent Print, Banner, Video | Come True Foundational Digital, Native | Kids Unplugged TV | Dream Eater Video, Native |
|---------------------------------|-----------------|-------------------------------------|-------------------------------------|--|-------------------|---------------------------|
| Households                      | 9,550,880       | 9,550,880                           | 9,550,880                           | 9,550,880                              | 9,550,880         | 9,550,880                 |
| Ad Recall                       | 50%             | 22%                                 | 22%                                 | 20%                                    | 19%               | 10%                       |
| Ad Aware Households             | 4,744,573       | 2,128,126                           | 2,127,791                           | 1,922,160                              | 1,854,871         | 976,978                   |
| Advertising Investment          | \$307,589       | \$89,668                            | \$10,773                            | \$78,469                               | \$149,101         | \$25,739                  |
| <b>Cost per Aware Household</b> | <b>\$0.06</b>   | <b>\$0.04</b>                       | <b>\$0.01</b>                       | <b>\$0.04</b>                          | <b>\$0.08</b>     | <b>\$0.03</b>             |

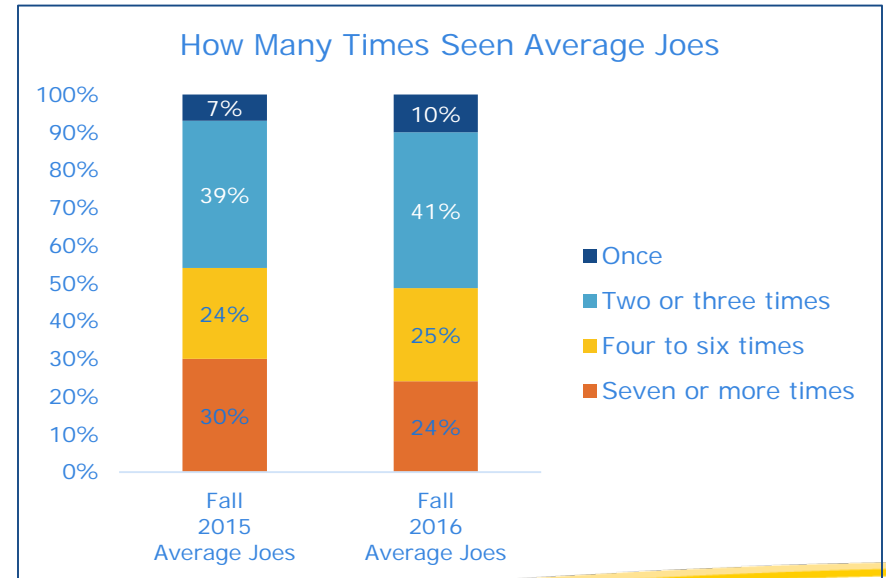
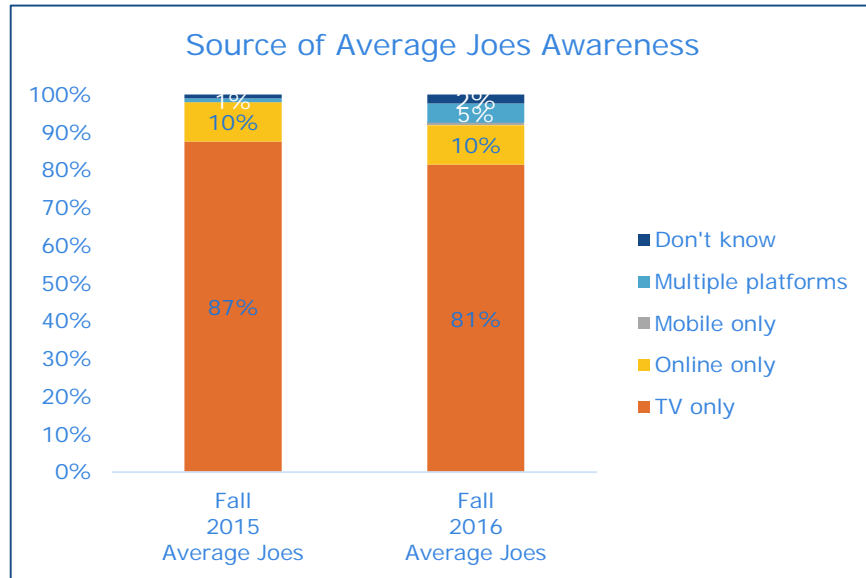
# Recall by Campaign by Target Segments

- Effective ad targeting and placement resulted in higher awareness of the targeted ads among the intended audiences.



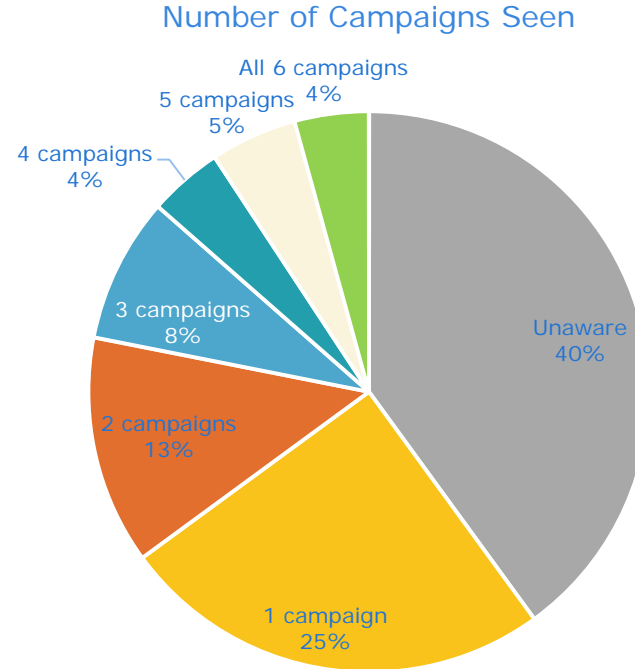
# Brand TV Recall

- Compared to fall 2015, in the current wave Canadian consumers are more likely to see the Average Joes brand TV spot on multiple platforms (and less likely to see the ad only on TV).
- Frequency of brand TV advertising exposure declined a bit compared to last fall, driven by lower TV spending.



# Campaign Overlap

- In total, 35% of Canadian consumers are aware of multiple fall 2016 campaigns.
- Historically, exposure to multiple campaigns results in synergistic impacts, generating greater lift than individual campaigns. We review campaign overlap impact later in this report.



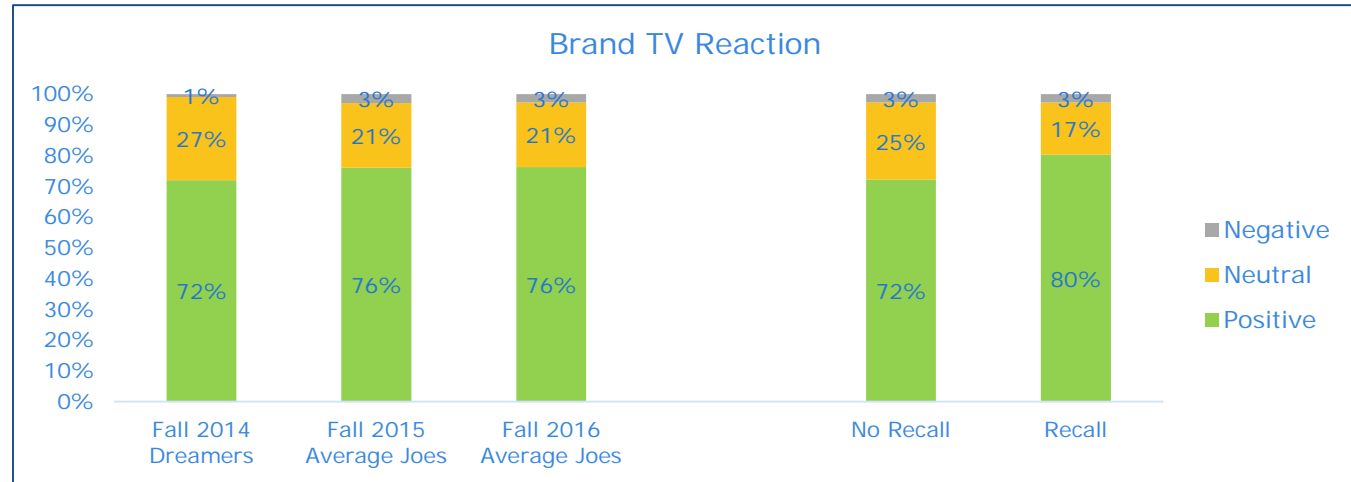


# Creative Ratings



# Brand TV Reaction

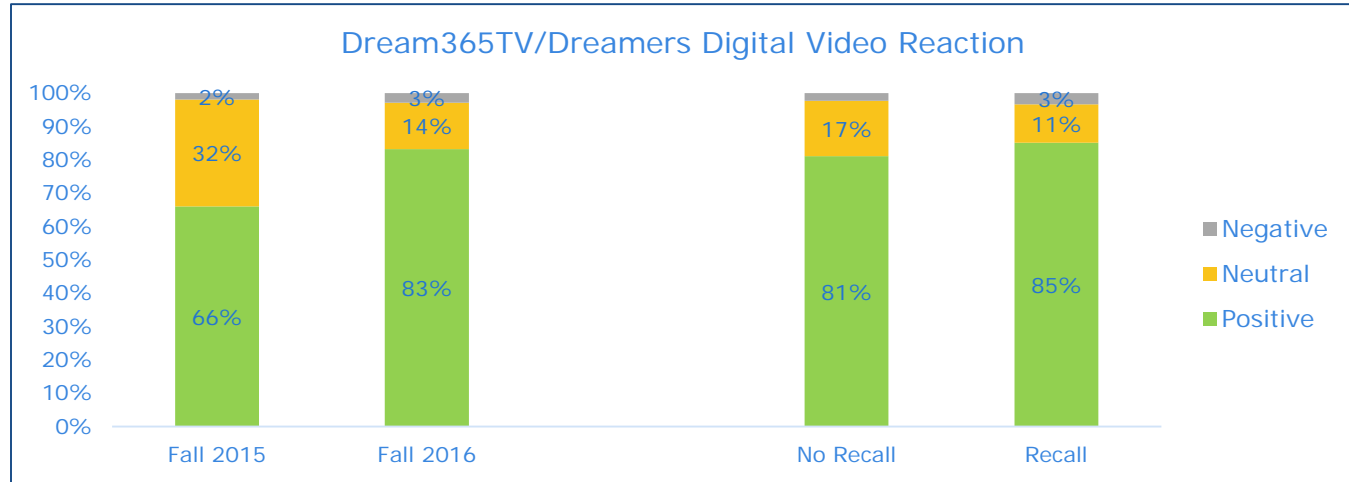
- The Average Joes ad sentiment ratings are unchanged from fall 2015, indicating that the ad is not showing signs of wear-out among the Canadian audience.
- The overall ratings for the specific ad attributes are all in the top 10% benchmark range (4.0 or above).



| Average Joes – How much do you agree that this ad shows... | Overall | No Recall | Recall |
|--|---------|-----------|--------|
| California as a place full of possibilities                | 4.2     | 4.1       | 4.3    |
| California as a place that inspires you to try new things  | 4.1     | 4.0       | 4.2    |
| That California's abundance provides endless experiences   | 4.2     | 4.1       | 4.3    |

# Dream365TV/Dreamers Digital Reaction

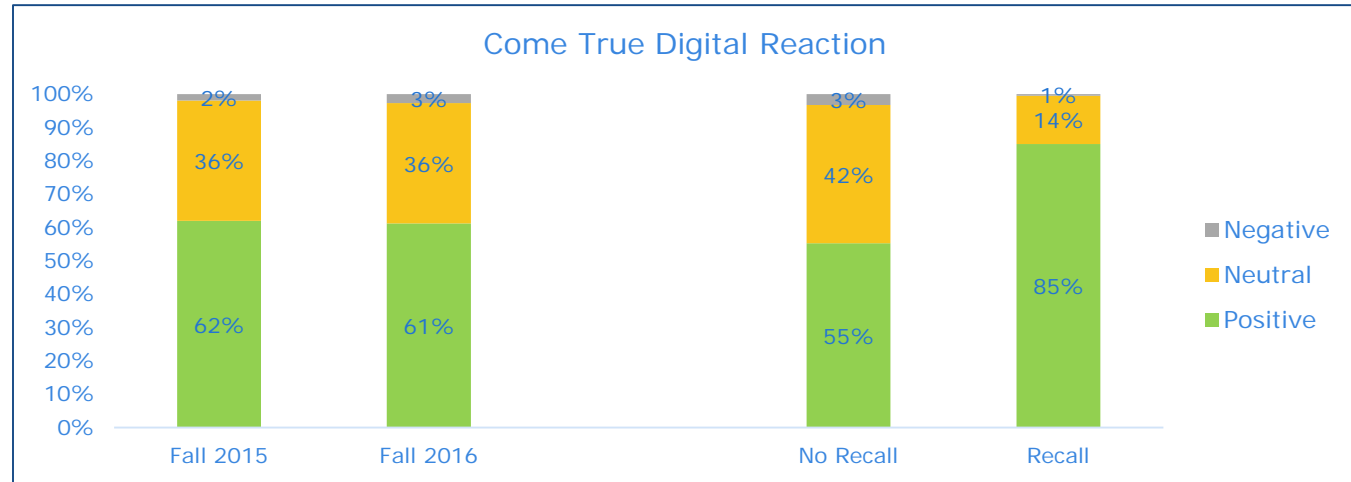
- The reaction to the Dream365TV/Dreamers ads has improved compared to the reaction in fall 2015, perhaps due to rotating in new videos.
- In terms of the specific attribute ratings, it is the aware consumers (those who had sought this content) that rate these ads the highest.



| Dream365TV/Dreamers   | Overall | No Recall | Recall |
|---|---------|-----------|--------|
| The California Dreamers series is a good way to showcase California's unique attitude and vibe – if you can dream it, you can do it | 3.9     | 3.8       | 4.3    |
| Californians who dream big and do things differently make the California experience unlike anyplace else                            | 3.8     | 3.7       | 4.2    |
| The California Dreamers series positively influences my perception of California  | 3.8     | 3.7       | 4.2    |

# Come True Foundational Digital Reaction

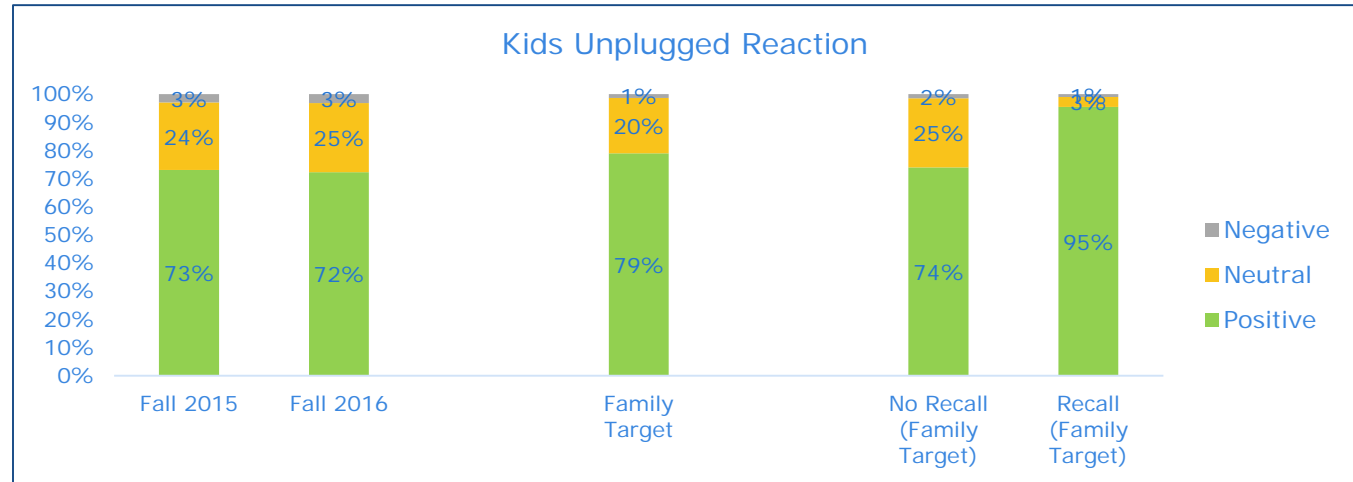
- Recall drives a positive reaction to the Come True foundational ads. This mirrors the Dream365TV/Dreamer's result, and suggests that the consumers who have sought content that led them to these ads are the most receptive to their messages.
- These foundational ads rate in the top 10% level (4.0 or above) for communicating the intended messages.



| Come True– How much do you agree that these ads show...   | Overall | No Recall | Recall |
|---|---------|-----------|--------|
| California is a place full of possibilities               | 4.1     | 4.0       | 4.4    |
| California is a place that inspires you to try new things | 4.0     | 3.9       | 4.3    |
| California's abundance provides endless experiences       | 4.1     | 4.0       | 4.3    |

# Kids Unplugged TV/OTV Reaction

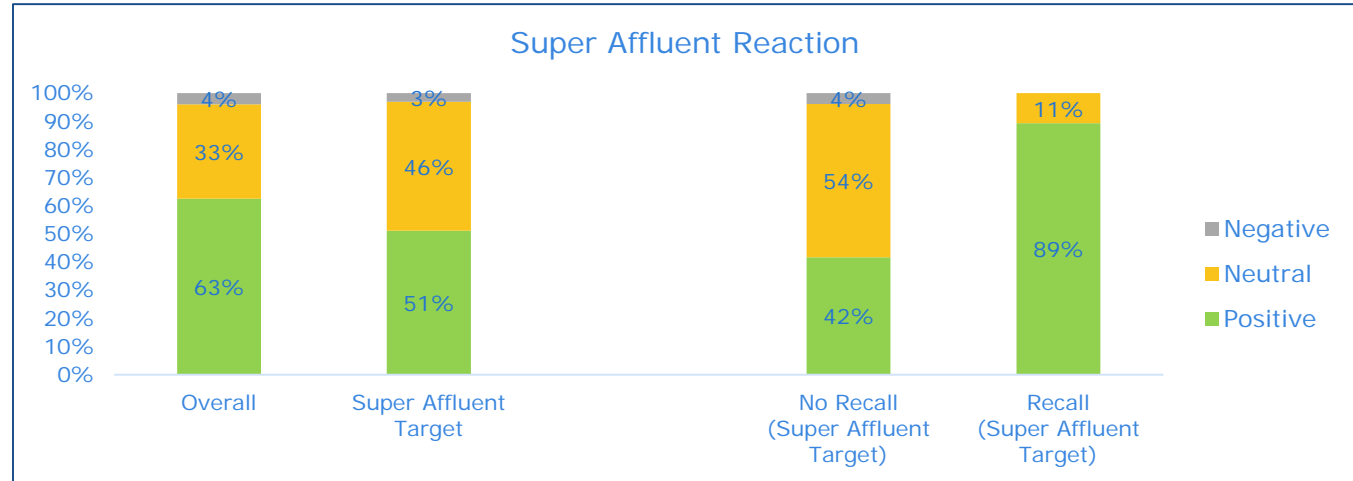
- Like the Average Joes spot, the proportion of positive reactions to Kids Unplugged has not eroded over time. This ad also rates in the top 10% benchmark level for communicating the specific intended messages.
- The intended audience (Family target) and those with recall have a more positive reaction to the ad.



| Kids Unplugged - How much do you agree that this ad...   | Overall | Family Target | No Recall (Family Target) | Recall (Family Target) |
|--|---------|---------------|---------------------------|------------------------|
| Shows California has a good balance of attractions/theme parks, outdoor activities and cultural experiences for families | 4.2     | 4.3           | 4.2                       | 4.6                    |
| Shows California's abundance of diverse activities make it the ultimate family playground                                | 4.1     | 4.3           | 4.2                       | 4.5                    |
| Positively influences my perception of California as a family destination  | 4.1     | 4.3           | 4.2                       | 4.5                    |

# Super Affluent Reaction

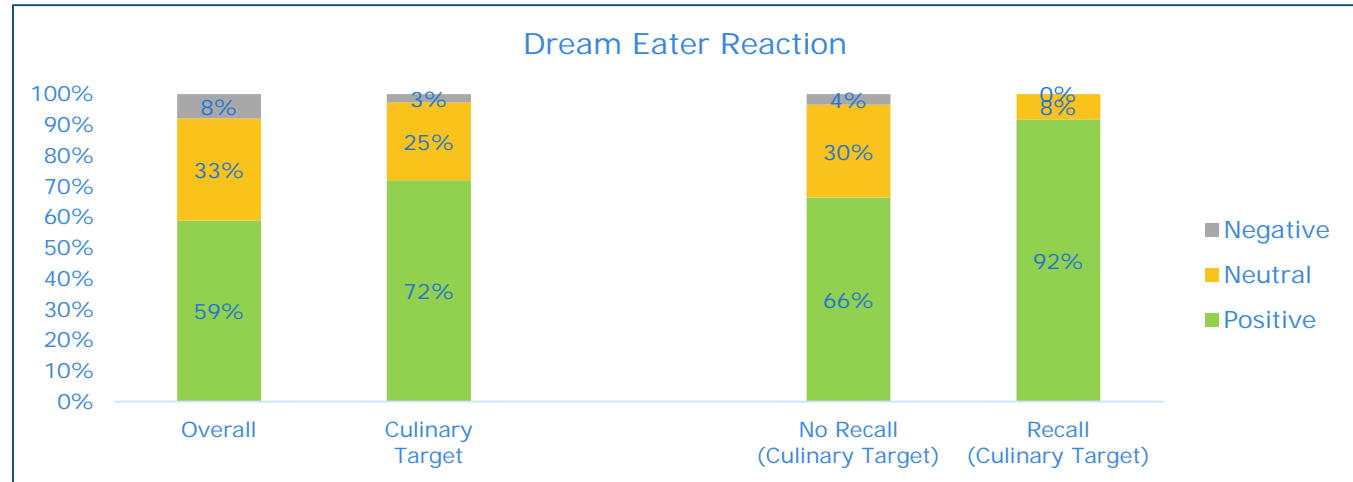
- The majority of Canadian consumers react positively to the Super Affluent ads, but there is a notable portion of “neutral” responses.
- It is interesting that the Super Affluent target rates the ads lower than the overall audience (in terms of overall reaction). But these ads are designed to be aspirational and appealing to all audiences.
- It is again prior recall that drives positive reactions – those seeking the content like it.



| Super Affluent – How much do you agree that these ads...                          | Overall | Super Affluent Target | No Recall (Super Affluent Target) | Recall (Super Affluent Target) |
|---|---------|-----------------------|-----------------------------------|--------------------------------|
| Show California delivers its own unique style of laid back luxury                 | 4.0     | 4.0                   | 3.8                               | 4.6                            |
| Show California offers a breadth of elevated but down to earth luxury experiences | 4.0     | 3.9                   | 3.7                               | 4.6                            |
| Positively influence my perception of California as a luxury destination          | 4.0     | 4.0                   | 3.8                               | 4.7                            |

# Dream Eater Digital/Native

- The Dream Eater ads resonate with the culinary target.
- And again, it is those who have sought the content who are the most positive.

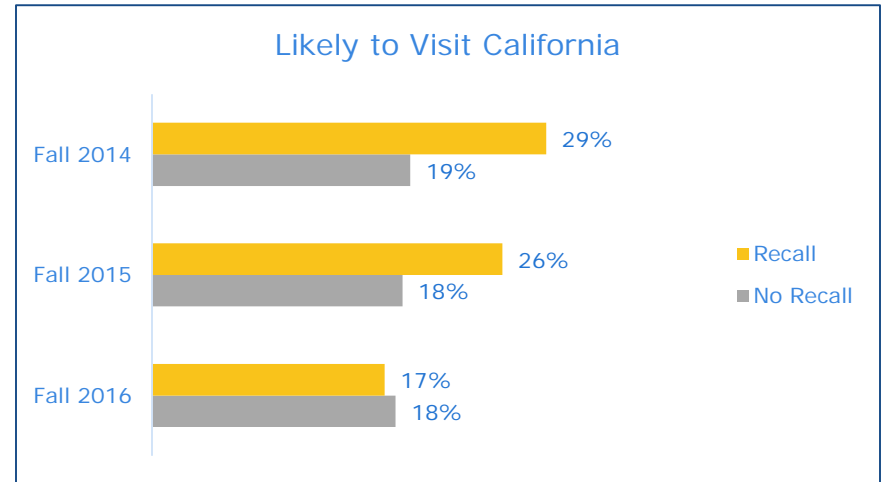
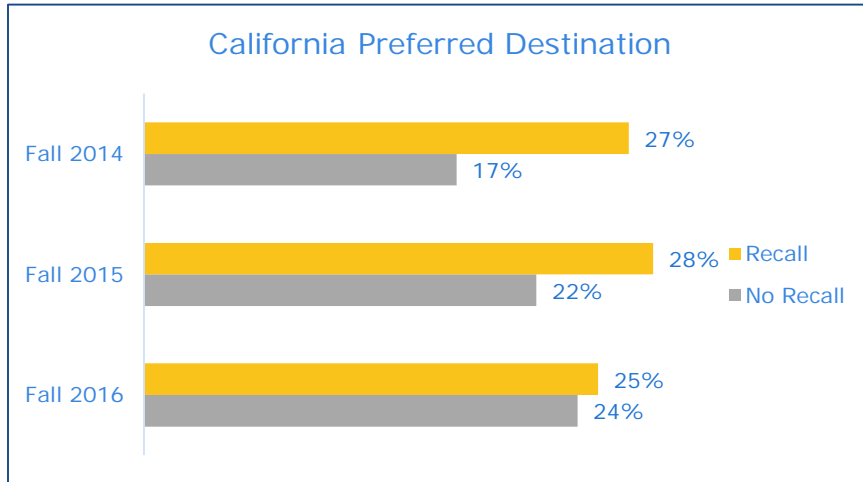


| Dream Eater – How much do you agree...   | Overall | Culinary Target | No Recall (Culinary Target) | Recall (Culinary Target) |
|--|---------|-----------------|-----------------------------|--------------------------|
| The Dream Eater series is a good way to learn about California restaurants and their unique offerings, from the iconic to the lesser known | 4.0     | 4.3             | 4.2                         | 4.5                      |
| The Dream Eater series is a fun way to allow consumers to be part of a conversation about California's food scene                          | 3.8     | 4.2             | 4.1                         | 4.5                      |
| The Dream Eater series positively influences my perception of California's local culinary experiences                                      | 3.8     | 4.2             | 4.2                         | 4.5                      |



# Advertising Impact

# Overall Impact



- In fall 2016, the ad impact on preferred destination is minimal – and there is no positive impact on likelihood to visit California. The previous two fall campaigns had a positive impact on both measures.
- This decline in impact on these measures is likely due to the current negative economic pressures in Canada. In addition, the baseline measure of preference has grown, indicating that the brand is becoming more established and making it more challenging to move the needle.
- The lack of overall impact highlights the importance of employing highly targeted campaigns that support the brand while generating interest among specific audiences.



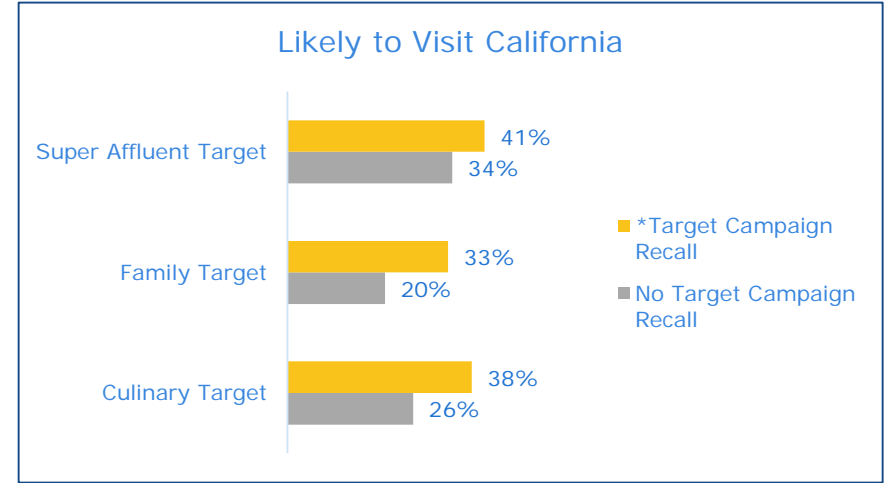
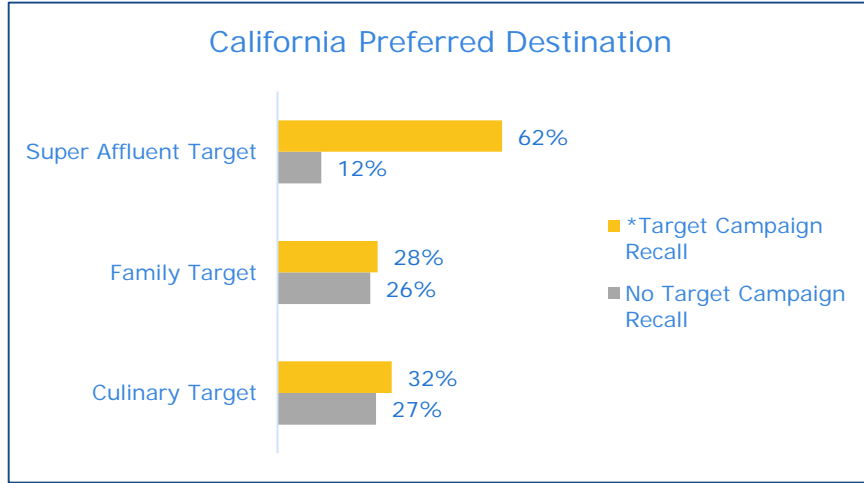
# Overall Impact

- While there is little or no ad impact on the measures of preference and likelihood to visit, the fall 2016 Canada advertising does help to build the California brand and spurs information gathering.

| Brand Attributes  | No Recall | Recall | Difference |
|---|-----------|--------|------------|
| California is a place full of possibilities               | 3.98      | 4.07   | 0.09       |
| California is a place that inspires you to try new things | 3.81      | 3.96   | 0.15       |
| California's abundance provides endless experiences       | 3.84      | 4.02   | 0.18       |

| Information Gathering   | No Recall | Recall | Difference |
|---|-----------|--------|------------|
| Visited the state's website, <a href="http://www.visitcalifornia.ca">www.visitcalifornia.ca</a> | 6%        | 20%    | 14%        |
| Followed the Visit California Facebook page   | 2%        | 11%    | 8%         |
| Followed Visit California on Instagram  | 2%        | 7%     | 5%         |
| Followed Visit California on Twitter  | 1%        | 5%     | 4%         |
| Ordered a visitor's guide   | 4%        | 10%    | 6%         |
| Called state travel office by phone   | 1%        | 3%     | 2%         |
| Gathered any information  | 20%       | 39%    | 19%        |

# Target Segment Impact

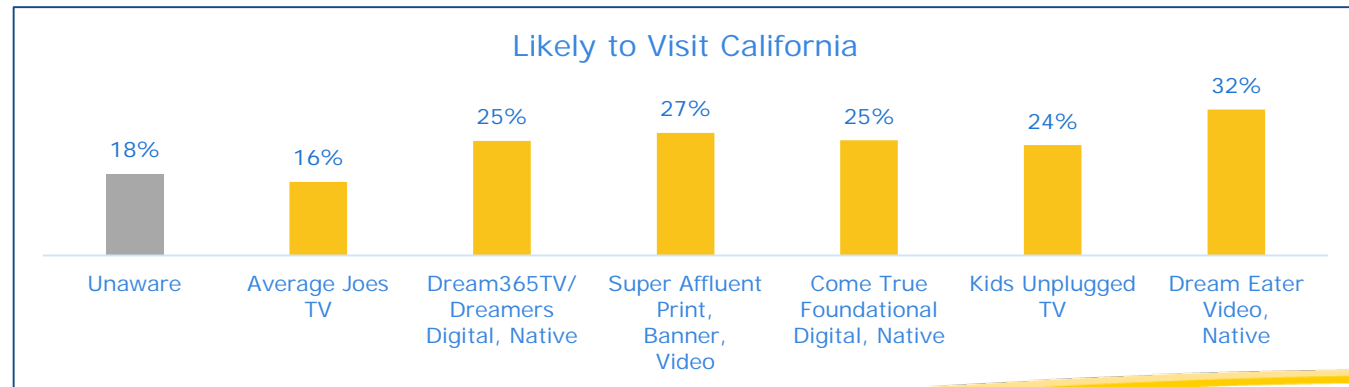
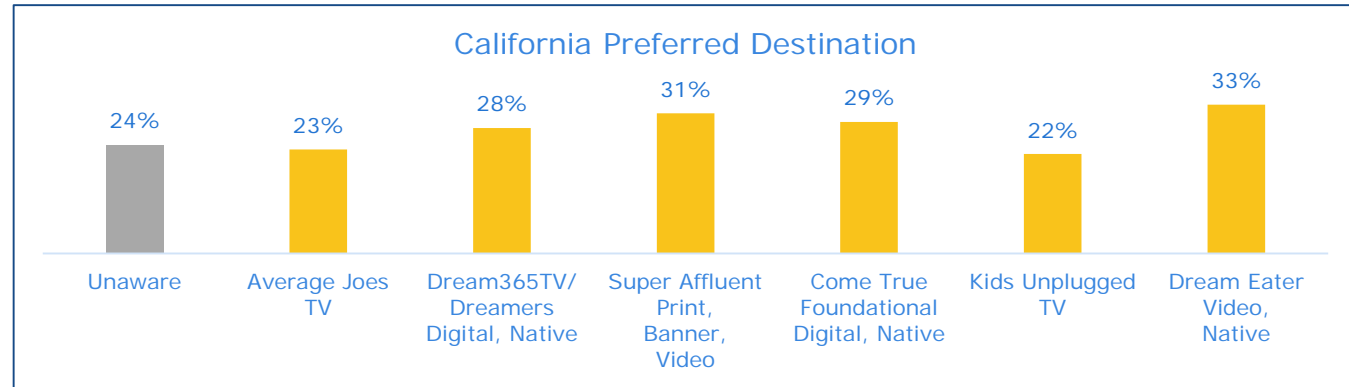


\*Target campaign = any Super Affluent ad for Super Affluent target, Kids Unplugged TV for Family target, and any Dream Eater ad for Culinary target

- The impact of the targeted campaigns among the target audience is much greater than the overall campaign impact, highlighting the importance of the targeted campaigns. The brand ads build awareness and image, but the highly targeted advertising makes the sale.

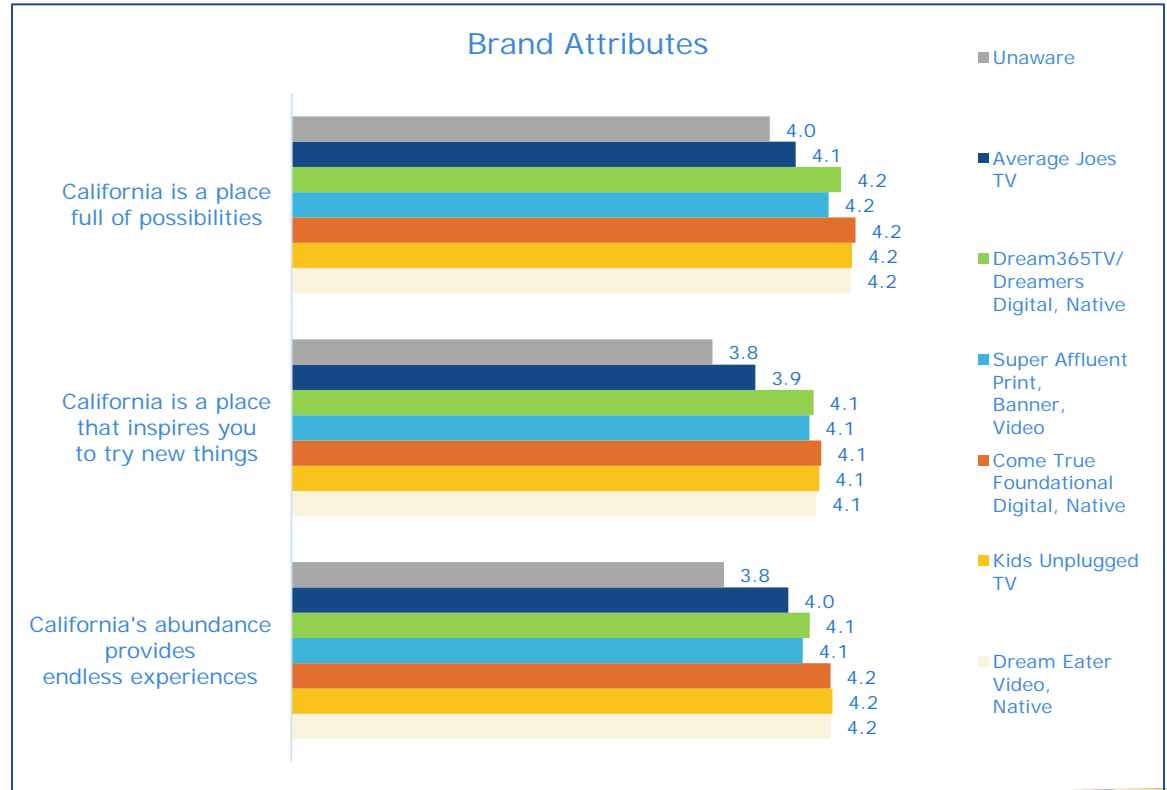
# Impact by Campaign

- Reviewing impact on California preference and likelihood to visit the state shows that awareness of the brand spot (Average Joes) does not provide lift above the baseline.
- The supporting campaigns are needed to generate ad impact.



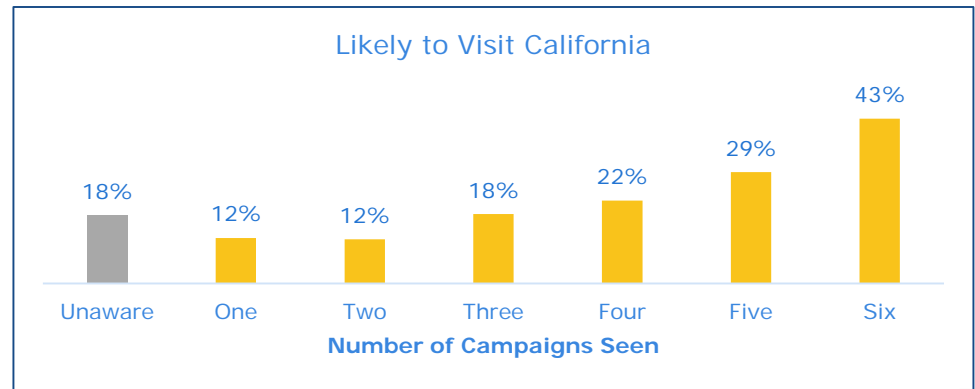
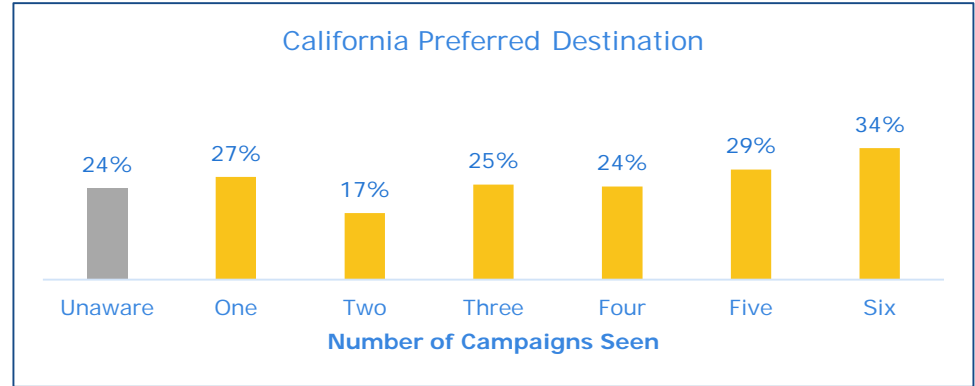
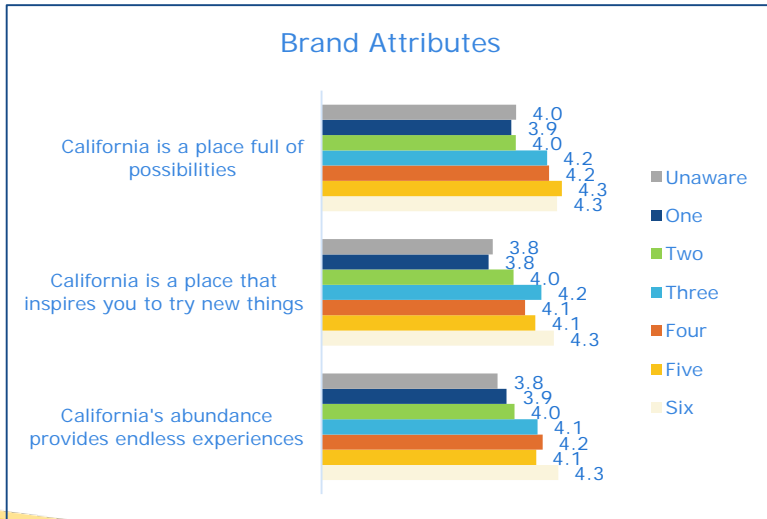
# Impact by Campaign


- The brand TV spot does have a positive impact on the California brand, but again the impact is less than that of the more targeted campaigns.



# Campaign Overlap Impact

- The importance of putting multiple campaigns in front of Canadian consumers is evident in these charts, as the greatest impact on the brand and interest in visiting occurs with awareness of five or six campaigns.





# Appendix: Questionnaire

# Questionnaire

**California Tourism  
2016 Canada Fall Awareness  
December 2016**

**SCREENERS, VARY BY COUNTRY**

S1. What is your postal code? \_\_\_\_\_

S2. Please indicate which of the following describe you (mark as many as apply).

**ROTATE**

I regularly use social media like Facebook, Twitter, or Instagram

I normally take at least one leisure trip a year that involves an overnight stay or is at least 50 miles from home

I regularly engage in some form of physical exercise like walking, biking or participating in sports to help stay healthy

I use video streaming services like Hulu or Netflix

None of these

S3. What is your age? \_\_\_\_\_

S4. Have you taken a leisure trip to the U.S. in the past 2 years?

1. .... Yes  
0. .... No

S5. How likely are you to take a leisure trip to the U.S. in the next 2 years?

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

S6. Who in your household is primarily responsible for making decisions concerning travel destinations?

1. .... Self  
2. .... Self & other  
3. .... Spouse/other

S7. Which of the following categories best represents the total annual income for your household before taxes?

1. .... Less than \$35,000 CAD  
2. .... \$35,000 but less than \$50,000 CAD  
3. .... \$50,000 but less than \$75,000 CAD  
4. .... \$75,000 but less than \$100,000 CAD  
5. .... \$100,000 but less than \$150,000 CAD  
6. .... \$150,000 but less than \$250,000 CAD  
7. .... \$250,000 but less than \$350,000CAD (SUPER AFFLUENT)  
8. .... \$350,000 but less than \$500,000 CAD (SUPER AFFLUENT)  
9. .... \$500,000 but less than \$750,000 CAD (SUPER AFFLUENT)  
10. .... \$750,000 but less than \$1,000,000 CAD (SUPER AFFLUENT)  
11. .... \$1,000,000 but less than \$1,250,000 CAD (SUPER AFFLUENT)  
12. .... \$1,250,000 but less than \$1,500,000 CAD (SUPER AFFLUENT)  
13. .... \$1,500,000 or more CAD (SUPER AFFLUENT)

TERMINATE IF S3<18, (S4=0 & S5=1), S6<3

1a. Thinking about the travel 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       |

Strategic Marketing & Research Insights  
- 1 -

|  | 1 | 2 | 3 | 4 | 5 |
|--|---|---|---|---|---|
| You will take shorter trips than last year   | 1 | 2 | 3 | 4 | 5 |
| You will spend less money on leisure travel than last year                         | 1 | 2 | 3 | 4 | 5 |
| You will choose to stay with family or friends rather than use paid accommodations | 1 | 2 | 3 | 4 | 5 |
| You will choose to drive rather than fly   | 1 | 2 | 3 | 4 | 5 |

1. Thinking about travel destinations, which U.S. STATES or cities come to mind?

- #1 \_\_\_\_\_  
#2 \_\_\_\_\_  
#3 \_\_\_\_\_  
#4 \_\_\_\_\_  
#5 \_\_\_\_\_

2. If time and money were not a consideration, which U.S. state would you most like to visit? [SHOW DROP DOWN LIST OF STATES PLUS D.C.]

2a. How likely are you to visit California in the next 12 months?

1. .... Not at all likely  
2. .... Not very likely  
3. .... Somewhat likely  
4. .... Very likely  
5. .... Already planning a trip

3. How much do you agree that the following statements describe California?

| [ROTATE]  | Strongly disagree | Neutral | Strongly agree |   |   |
|---|-------------------|---------|----------------|---|---|
| California is a place full of possibilities               | 1                 | 2       | 3              | 4 | 5 |
| California is a place that inspires you to try new things | 1                 | 2       | 3              | 4 | 5 |
| California's abundance provides endless experiences       | 1                 | 2       | 3              | 4 | 5 |

4. The next questions pertain to your image of the state of California as a place to visit. For each statement, rate how much you agree or disagree that the statement describes California. How strongly do you agree or disagree that California...?

| [ROTATE]  | Strongly disagree | Neutral | Strongly agree |   |   |
|---|-------------------|---------|----------------|---|---|
| Has excellent beaches   | 1                 | 2       | 3              | 4 | 5 |
| Has large cities with exciting urban experiences - nightlife, shopping, dining and theatre                      | 1                 | 2       | 3              | 4 | 5 |
| Is a place where culinary experiences (food, wine, craft beer, are part of the culture/lifestyle                | 1                 | 2       | 3              | 4 | 5 |
| Is a good place for snow sports   | 1                 | 2       | 3              | 4 | 5 |
| Has great professional sporting events  | 1                 | 2       | 3              | 4 | 5 |
| Is the ultimate family playground with and abundance of family activities, theme park and attractions           | 1                 | 2       | 3              | 4 | 5 |
| Has a variety of active outdoor activities – hiking, climbing, biking, golfing, boating, surfing, fishing, etc. | 1                 | 2       | 3              | 4 | 5 |
| Is a place with lots to see and do  | 1                 | 2       | 3              | 4 | 5 |
| Is scenic and beautiful   | 1                 | 2       | 3              | 4 | 5 |
| Has picturesque national and state parks  | 1                 | 2       | 3              | 4 | 5 |
| Has many quaint towns and off the beaten path experiences   | 1                 | 2       | 3              | 4 | 5 |
| Is culturally diverse   | 1                 | 2       | 3              | 4 | 5 |
| Has lakes for boating & fishing   | 1                 | 2       | 3              | 4 | 5 |

Strategic Marketing & Research Insights  
- 2 -

|   | 1 | 2 | 3 | 4 | 5 |
|---|---|---|---|---|---|
| Has interesting historic and cultural sites                   | 1 | 2 | 3 | 4 | 5 |
| Provides a good value for the money                           | 1 | 2 | 3 | 4 | 5 |
| Offers laid-back luxury (high end resorts, spas, etc.)        | 1 | 2 | 3 | 4 | 5 |
| Has great variety in music events, concerts and festivals     | 1 | 2 | 3 | 4 | 5 |
| A place where celebrity and Hollywood are part of the culture | 1 | 2 | 3 | 4 | 5 |
| Has many unique vacation experiences in one                   | 1 | 2 | 3 | 4 | 5 |
| Is worth paying more to visit                                 | 1 | 2 | 3 | 4 | 5 |

4a. Thinking about California as a place to visit, how strongly do you agree or disagree that the following statements represent California's feeling, vibe and culture?

| [ROTATE]                                       | Strongly disagree | Neutral | Strongly agree |   |   |
|--|-------------------|---------|----------------|---|---|
| A place where people are inspired to dream big | 1                 | 2       | 3              | 4 | 5 |
| Youthful                                       | 1                 | 2       | 3              | 4 | 5 |
| Free spirited                                  | 1                 | 2       | 3              | 4 | 5 |
| Casual and laid-back                           | 1                 | 2       | 3              | 4 | 5 |
| Offers the best of everything in one place     | 1                 | 2       | 3              | 4 | 5 |
| A place that doesn't take itself too seriously | 1                 | 2       | 3              | 4 | 5 |
| A place where I can be myself                  | 1                 | 2       | 3              | 4 | 5 |
| A place where people live life to the fullest  | 1                 | 2       | 3              | 4 | 5 |

5. When you travel for leisure, how often do you participate in each of the following?

| ROTATE  | 1<br>Never | 2<br>Seldom | 3<br>Sometimes | 4<br>Often | 5<br>Always |
|---|------------|-------------|----------------|------------|-------------|
| Exploring farm tours or farm trails             |            |             |                |            |             |
| Going to a farmer's market                      |            |             |                |            |             |
| Attending a culinary festival or event          |            |             |                |            |             |
| Dining at a unique restaurant                   |            |             |                |            |             |
| Dining at a celebrity/notable chef's restaurant |            |             |                |            |             |
| Visiting a winery/or a wine tour                |            |             |                |            |             |
| Visiting a craft brewery/or brewery tour        |            |             |                |            |             |

6. In the past year, have you seen material on California's travel website [www.visitcalifornia.ca](http://www.visitcalifornia.ca)?



1. Yes  
0. No

7. In the past year, have you seen material from Visit California's Facebook page?



1. Yes  
0. No

Strategic Marketing & Research Insights  
- 3 -

# Questionnaire

8. In the past year, have you seen images like these from Visit California on Instagram?



1. Yes  
0. No

9. In the past year, have you done any of the following when planning for a trip to California? Select all that apply.

- Visited the state's website, www.visitcalifornia.ca
- Followed the Visit California Facebook page
- Followed Visit California on Instagram
- Followed Visit California on Twitter
- Ordered a visitor's guide
- Called state travel office by phone
- Gathered information using another method, please specify \_\_\_\_\_
- None

10. In the last year, do you recall seeing any TV, digital, print or outdoor advertising for travel to the state of California?

1. Yes  
0. No → SKIP TO ADS

11. Please list the advertising you recall. \_\_\_\_\_

Next you will be shown travel advertisements. Please take a moment to view the ads and answer the questions.

Average Joes TV



<https://youtu.be/7su020HhMY>

12. Have you seen this ad before?

1. Yes  
0. No → SKIP TO 12c

12a. Where do you recall seeing it? (ACCEPT MULTIPLES)

1. TV
2. Online
3. Mobile
4. Do not recall

12b. How many times have you seen it?

1. Once
2. Two or three times
3. Four to six times
4. Seven or more times

Strategic Marketing & Research Insights

- 4 -

12c. What is your reaction to this ad?

1. Positive
2. Negative → ASK 12d
3. Neutral

12d. Why do you feel that way? \_\_\_\_\_

12e. How much do you agree that this ad shows...?

| [ROTATE]  | Strongly disagree |   |   |   | Strongly agree |
|---|-------------------|---|---|---|----------------|
| California is a place full of possibilities               | 1                 | 2 | 3 | 4 | 5              |
| California is a place that inspires you to try new things | 1                 | 2 | 3 | 4 | 5              |
| California's abundance provides endless experiences       | 1                 | 2 | 3 | 4 | 5              |

DREAM365TV DIGITAL

Teaser Video



<https://www.youtube.com/watch?v=hQwJXP0c&index=4&list=PLrw9XyyuEBymKzKTyU1UJUpplPrjgAlb>

DTV1. Do you recall seeing this or a similar Dream365TV ad before?

1. Yes  
0. No

NATIVE



DTVN1. Have you seen any of these California articles/related videos before?

1. Yes  
0. No

CALIFORNIA DREAMERS VIDEOS

PRESENT THUMBNAILS AND LINKS OF THE SEVEN FULL-LENGTH DREAMERS VIDEOS WITH AN OPTION TO CLICK THE LINK AND RESPOND WHETHER PREVIOUSLY SEEN.

Strategic Marketing & Research Insights

- 5 -

Below are images from California Dreamers videos.

California Dreamers Series Description:

California Dreamers is an original documentary video series that profiles people in California who are chasing their dreams, making them come true and helping to shape the unique California vibe.

Please click on any pictures that look familiar to you.

Follow-up:

Do you recall watching this or similar California Dreamers video content?

Bella Kenworthy



[https://www.youtube.com/watch?v=a3MSF7d\\_YsY&index=5&list=PLrw9XyyuEBymKzKTyU1UJUpplPrjgAlb](https://www.youtube.com/watch?v=a3MSF7d_YsY&index=5&list=PLrw9XyyuEBymKzKTyU1UJUpplPrjgAlb)

Baldassare Forestiere



<https://www.youtube.com/watch?v=7k3GyPvK4CY&index=7&list=PLrw9XyyuEBymKzKTyU1UJUpplPrjgAlb>

Marta Becket



<https://www.youtube.com/watch?v=Zd61bKwFbs&index=7&list=PLrw9XyyuEBymKzKTyU1UJUpplPrjgAlb>

Surfboard



<https://www.youtube.com/watch?v=Dy46A6eTg8&index=6&list=PLrw9XyyuEBymKzKTyU1UJUpplPrjgAlb>

Twigtecture



<https://www.youtube.com/watch?v=8W640JftcU4&index=11&list=PLrw9XyyuEBymKzKTyU1UJUpplPrjgAlb>

Trimble



<https://www.youtube.com/watch?v=fShxBUSNzPQ&index=19&list=PLrw9XyyuEBymKzKTyU1UJUpplPrjgAlb>

Tommy & Kevin



<https://www.youtube.com/watch?v=XQATJckbeY&index=3&list=PLrw9XyyuEBymKzKTyU1UJUpplPrjgAlb>

20. Do you recall watching this or similar California Dreamers video content?

1. Yes  
0. No

Strategic Marketing & Research Insights

- 6 -



# Questionnaire

20a. What is your reaction to these videos?

1. Positive
2. Negative → ASK 20b
3. Neutral

20b. Why do you feel that way? \_\_\_\_\_

**NATIVE**



CADN1. Have you seen any of these California articles/related videos before?

1. Yes
0. No

CAD2. Thinking of the California Dreamers online ads and videos you have seen, how much do you agree these ads show...?

| [ROTATE]   | Strongly disagree |   |   |   | Strongly agree |
|--|-------------------|---|---|---|----------------|
| The California Dreamers series is a good way to showcase California's unique attitude and vibe – if you can dream it, you can do it. | 1                 | 2 | 3 | 4 | 5              |
| Californians who dream big and do things differently make the California experience unlike anyplace else.                            | 1                 | 2 | 3 | 4 | 5              |
| The California Dreamers series positively influences my perception of California.  | 1                 | 2 | 3 | 4 | 5              |

**COME TRUE DIGITAL**

Foundational – Come True Banners

I:\Ads Master\California\2016 Domestic Fall Awareness\VCA\_Research\_Fall Banner\VCA\_Research\_Fall Banner\Foundational

**SHOW IN GROUPS OF THREE ON A SCREEN**

Strategic Marketing & Research Insights  
- 7 -



**ASK FOR GROUP OF DIGITAL ADS**

CT1. Do you recall seeing these or any similar online ads promoting California vacation experiences before?

1. Yes
0. No

CT2. What is your reaction to these ads?

1. Positive
2. Negative → ASK CT3
3. Neutral

CT3. Why do you feel that way? \_\_\_\_\_

CT4. Thinking of these ads you have seen, how much do you agree these ads show...?

| [ROTATE]   | Strongly disagree |   |   |   | Strongly agree |
|--|-------------------|---|---|---|----------------|
| California is a place full of possibilities.               | 1                 | 2 | 3 | 4 | 5              |
| California is a place that inspires you to try new things. | 1                 | 2 | 3 | 4 | 5              |
| California's abundance provides endless experiences.       | 1                 | 2 | 3 | 4 | 5              |

**UNPLUGGED TV Show :30**



<https://youtu.be/wAp2-jLjYkM>

TVKID. Do you recall seeing this ad before?

1. Yes
0. No → SKIP TO TVKID\_c

Strategic Marketing & Research Insights  
- 8 -

TVKIDa. Where do you recall seeing it? (ACCEPT MULTIPLE)

1. TV
2. Online
3. Mobile
4. Do not recall

TVKIDb. How many times have you seen it?

1. Once
2. Two or three times
3. Four to six times
4. Seven or more times

TVKID\_c. What is your reaction to this ad?

1. Positive
2. Negative → ASK TVKID\_d
3. Neutral



TVKID\_d. Why do you feel that way? \_\_\_\_\_

TVKID\_e. Thinking of this television ad, how much do you agree that this ad...?

| [ROTATE]  | Strongly disagree |   |   |   | Strongly agree |
|---|-------------------|---|---|---|----------------|
| California has a good balance of attractions/theme parks, outdoor activities and cultural experiences for families. | 1                 | 2 | 3 | 4 | 5              |
| California's abundance of diverse activities make it the ultimate family playground.                                | 1                 | 2 | 3 | 4 | 5              |
| Positively influences my perception of California as a family destination.  | 1                 | 2 | 3 | 4 | 5              |

**SUPER AFFLUENT**

SA3. Have you seen this print or magazine ads before?

| ADS   | Yes, I have seen this print or magazine ad before | No, I have not seen this print or magazine ad before |
|---|---|--|
| CA_Affluent_AnnetLawless_Oct Fortune.pdf<br>           |   |  |
| CA_Affluent_GabbyHeeze Departures October 2016.pdf<br> |   |  |

Strategic Marketing & Research Insights  
- 9 -

# Questionnaire



CA\_Affluent\_TYLER T+L October 2016.pdf

SA4. What is your reaction to these ads?

- Positive
- Neutral → ASK SAS
- Negative

SAS. Why do you feel this way? \_\_\_\_\_

## DIGITAL

|   |   |  |
|---|---|--|
| <p>Annie Lawless 300x250.jpg</p> <p>Annie.png</p> | <p>Gabby Reece 300x250.jpg</p> <p>Gabby.png</p> | <p>Tyler Florence 300x250.jpg</p> <p>Tyler.png</p> |
|---|---|--|

## ASK FOR GROUP OF DIGITAL ADS

SAD. Do you recall seeing these or any similar online ads?

- 1. Yes
- 0. No

## VIDEO

Tyler Florence – Full  
After a minute, you can answer the question and click >> to advance to the next question without viewing the rest of the video.



<https://youtu.be/FfhwD8t8io>

Gabby Reece - 30



[https://youtu.be/oe-SC\\_IDAv4](https://youtu.be/oe-SC_IDAv4)

Annie Lawless - 15



<https://youtu.be/WJIGfX3aIA>

SA. Do you recall seeing this ad before?

- 1. Yes
- 0. No

SA1. What is your reaction to these videos?

- 4. Positive
- 5. Negative → ASK SA2
- 6. Neutral

SA2. Why do you feel that way? \_\_\_\_\_

SA6. Thinking of the videos and print ads you have seen, how much do you agree these ads...?

| [ROTATE]  | Strongly disagree |   |   |   | Strongly agree |
|---|-------------------|---|---|---|----------------|
| Show California delivers its own unique style of laid back luxury                 | 1                 | 2 | 3 | 4 | 5              |
| Show California offers a breadth of elevated but down to earth luxury experiences | 1                 | 2 | 3 | 4 | 5              |
| Positively influence my perception of California as a luxury destination          | 1                 | 2 | 3 | 4 | 5              |

## California Dream Eater

California Dream Eater Series Description:

California Dream Eater is an original "entertainment" video series featuring Chase Ramsey, student of food, who eats the best things in California on behalf of foodies everywhere.

## NATIVE



CDEN. Have you seen any of these California articles/related videos before?

- 1. Yes
- 0. No

## CDE Top Performing Videos

ONLY SHOW 1 OF THE FOLLOWING FULL-LENGTH VIDEOS.

Please view the following promotional video and answer the question that follows.

After 30 seconds, you can answer the question and click >> to advance to the next question without viewing the rest of the video.

## Donut Bar



<https://www.youtube.com/watch?v=PxHrztUHo&index=23&list=PLrw9YyUfEBynDun-ArdXwhlccDkHECa3V>

## Gulshados



<https://www.youtube.com/watch?v=F06yR8GwVg&list=PLrw9YyUfEBynDun-ArdXwhlccDkHECa3V&index=28>

## Sancho's Tacos



<https://www.youtube.com/watch?v=cm50vaVgd10&index=26&list=PLrw9YyUfEBynDun-ArdXwhlccDkHECa3V>

## Empty Bowls



<https://www.youtube.com/watch?v=iE0VM8RC0F8&index=14&list=PLrw9YyUfEBynDun-ArdXwhlccDkHECa3V>

## Mundaka



<https://www.youtube.com/watch?v=QVf80D4hhw&index=20&list=PLrw9YyUfEBynDun-ArdXwhlccDkHECa3V>

# Questionnaire

## The Attic



[https://www.youtube.com/watch?v=7QC\\_k\\_jQuU&index=29&list=PLrw9YyysEBynDun-ArdXwhIccD8HECa3Y](https://www.youtube.com/watch?v=7QC_k_jQuU&index=29&list=PLrw9YyysEBynDun-ArdXwhIccD8HECa3Y)

## Fats



[https://www.youtube.com/watch?v=XPNgJyX\\_Y&index=31&list=PLrw9YyysEBynDun-ArdXwhIccD8HECa3Y](https://www.youtube.com/watch?v=XPNgJyX_Y&index=31&list=PLrw9YyysEBynDun-ArdXwhIccD8HECa3Y)

## The Hungry Cat



[https://www.youtube.com/watch?v=Uffm\\_Ob2HO&index=17&list=PLrw9YyysEBynDun-ArdXwhIccD8HECa3Y](https://www.youtube.com/watch?v=Uffm_Ob2HO&index=17&list=PLrw9YyysEBynDun-ArdXwhIccD8HECa3Y)

CDE\_1. Do you recall seeing this or any other California Dream Eater video before?  
 1. Yes  
 0. No

CDE\_A. What is your reaction to these California Dream Eater ads and videos?  
 1. Positive  
 2. Negative → ASK CDE\_B  
 3. Neutral

CDE\_B. Why do you feel that way? \_\_\_\_\_

CDE\_C. Thinking of the California Dream Eater series, how much do you agree...?

| ROTATE   | Strongly disagree |   |   |   | Strongly agree |
|--|-------------------|---|---|---|----------------|
| The Dream Eater series is a good way to learn about California restaurants and their unique offerings, from the iconic to the lesser known | 1                 | 2 | 3 | 4 | 5              |
| The Dream Eater series is a fun way to allow consumers to be part of a conversation about California's food scene                          | 1                 | 2 | 3 | 4 | 5              |
| The Dream Eater series positively influences my perception of California's local culinary experiences                                      | 1                 | 2 | 3 | 4 | 5              |

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

DEMO1. What is your marital status? Are you...?  
 Married/living as married  
 Divorced/separated  
 Widowed  
 Single/never married

DEMO2. Including you, how many people are currently living in your household? \_\_\_\_\_

DEMO3. How many living in your household are children younger than 18? \_\_\_\_\_

Strategic Marketing & Research Insights  
 - 13 -

## BY COUNTRY

DEMO4. Which of the following categories represents the last grade of school you completed?

- High school or less
- Some college/technical school
- College graduate
- Post-graduate degree

DEMO5. Which of the following best describes your ethnic heritage? Are you...?

- African American
- Asian-American
- Caucasian
- Hispanic/Latin American
- Mixed ethnicity
- Native American
- Other

DEMO6. Are you...?

- Male
- Female

DEMO7. Who provides your television service?

- ATT
- BrightHouse
- Charter Spectrum
- Comcast/Infinity
- Cox
- Direct TV
- Dish
- Time Warner
- None/NA

Those are all the questions we have for you today.

We appreciate your time and willingness to share your opinions.

Strategic Marketing & Research Insights  
 - 14 -