



PME Qualitative Research Key Findings

Monday, Nov. 1, 2021



PME Guiding Principles

1. Do what the industry can't do for itself.
2. Support product education and brand health.
3. Guide statewide California presence.
4. Extend California sustainability messaging.

PME Objectives

- Develop a strategic campaign targeting meeting and events professionals that showcases California is open for business.
- Increase business travel by reintroducing California to key event professionals as a leading destination for meeting, conventions and incentives.
- Integrate and extend destination sales messaging.
- Generate immediate demand and booking for California meetings, to stimulate the economy and job recovery now and in the future.



PME Qualitative Research Overview

PME Research Objectives

Validate & refine the California professional meetings and events brand positioning and platform.

Evaluate current target and category insights, barriers and motivations to inform the program of work going forward.

Research Methodology: Qualitative Online Forum

Domestic Geographic Representation

Colorado, Illinois, Ohio, Washington DC, Hawaii, California, Minnesota, Georgia, Utah, Washington, New Jersey, Tennessee, Arizona, New Mexico, New York, Virginia, Kentucky, Missouri, Virginia, Idaho, Indiana, Texas, Michigan

60 PME Planners (with many planning multiple meeting types)

- Corporate 65%
- Association/Conventions 55%
- Conferences 53%
- Incentives 38%
- Citywide 23%

Familiar with California

Majority of planners had hosted meetings in California in the last 3 years; roughly 10% had not booked

Online Forum platform uses a question-and-answer format that allows for rich dialogue around prompts and topics. Planners logged in twice a day for three days for ongoing discussion.

Areas of Discussion

BRAND EXPLORATION

Perceptions of the California brand and the California PME brand, characteristics, unique point of difference and value proposition; where the two intersect.

POSITIONING & KEY MESSAGING

Feedback on California PME positioning, motivators and barriers.

PLANNING PROCESS & BEYOND

Understanding key selling proposition, key communications, key influencers, the future of meetings and events, and role of the state and local DMO (CVB).



Brand Exploration

Perceptions of the California leisure brand and California PME brand were very positive among planners.

More importantly, the synergistic relationship between the California leisure and PME brands was validated.

California Leisure & PME Brand Synergy

LEISURE BRAND

Abundance of Diverse Experiences & Landscapes

"California = access to a diversity (landscape, culture, food, events, travel possibilities)."



Year-round Climate & Outdoor Lifestyle

"Living your best life. Outdoor fun, fitness, spectacular weather."



The Unique California Attitude

"People filled with zest and living in the freedom of the West."



PME BRAND

Abundance of Diverse Experiences & Meetings Product

"Something for everyone ranging from incentives to large conventions."

"Diversity in culture, experiences, weather."

Year-round Climate & Outdoor Venues

"Meeting outdoors in the sunshine with others."

"A meeting location where it's easy to incorporate fun activities in the gorgeous California climate."

Hospitable to All

"Open hospitality, a warm and inviting atmosphere."

Innovative

"New age, technology, innovation, leading edge."

Associated brand values mirror one another and could be interchangeable.



Aided brand attributes reinforce what is core to California & PME brands while uncovering a unique emotional benefit.

55% environmentally conscious

46% fun

43% diverse

31% innovative

29% welcoming, creative

27% open-minded, inclusive, progressive

25% luxurious, glamorous

Environmentally conscious is top aided brand characteristic for the California PME brand.

California is seen as a sustainable destination providing a halo effect for the PME brand.

While not ultimate decision factor...

1. California is getting credit for leading sustainability.
2. Sustainability is an emotional benefit for planners/company/organizations, wants to do their part or have same values.

“For us, it absolutely doesn't hurt. Having sustainability baked into the destination takes the pressure of the planner.”

“The California mindset has always seemed to be ‘eco-friendly’...hybrid cars, recycling as a state; I feel they've been in the forefront of this important movement.”

“It can always be viewed as a bonus and good for clients to give that message to their attendees.”

No other PME destination is seen to offer as much as California; our unique state-of-mind and vibe sets us apart.

*“I would describe it as **a place that has something for everyone. Open and accepting of all beliefs, cultures, orientations. A place where you can be yourself and work hard.** There is the beach, wineries, woods, hiking, Disney. Come for your meeting and stay for vacation.”*

*“A place where anything goes and **endless possibilities** for any type of venue you can think of.”*

*“A **wide array of possible experiences** from water to mountains, quiet to active, luxury to economical, etc. It can be whatever you want it to be.”*

PROFESSIONAL MEETINGS & EVENTS

Category Trends & California Opportunity

Hit hard as an industry with people missing face-to-face, COVID has changed role and nature of meetings.

*“We have discovered that there are real benefits to virtual meetings, but that certain meetings cannot be replaced with virtual. Hybrid is a real option in many scenarios. **We have to be more strategic in how we consider connecting people.**”*

*“**People want to connect**, and they want to do it as face-to-face as possible. Having the space to get your group together, but also be able to utilize technology to create a **hybrid meeting environment** for those who are uncomfortable or unable to attend.”*

COVID has made Return on Experience (ROE) of meetings and events more important than ever.

1

Networking, relationships,
team building

3

Enjoyment, relaxation & fun

2

Learning, motivational &
productive experience

4

Safety still a cost of entry

In fact, the pandemic has made in person meetings and events more important than ever...

*“For our company in person events, have become **more important than ever**. Our attendees really just want to get back to meeting in person...there's so much better energy, networking, etc. and we feel **we get a lot bigger ROI on our events when they're in person.**”*

California can deliver on the meeting of the future like no other destination based on category trends and the state's distinct offerings and mindset.

“California is well positioned to take advantage in the meetings evolution based upon its unique culture and progressive stance on all things.”

The California Advantage

OUTDOOR CLIMATE

“They are prime for outdoor spaces year-round.”

“Yes, California is uniquely positioned for the changes of more access to outdoor event/meeting space mainly due to the optimal weather in many parts of the state.”

INCLUSIVE (to all voices)

“Much more collaboration and recognition that all attendees are experts.”

“To bring people together with different perspectives and let them speak – the days of just talking heads are over.”

CALIFORNIA

TECH & INNOVATION

“With all the technology companies based in California, they are well positioned to take the lead on how meetings evolve from here moving forward. They should have some of these innovative people at these state-of-the-art companies be consultants to the state on how they can innovate the meetings and conference landscape in California.”

SUSTAINABLE/GREEN

“They are a progressive state that typically leads the world in forward thinking, so I presume hotels, restaurants and venues in California are very much into being eco-friendly and doing all possible to save our planet.”



Positioning Exploration

California Leisure Brand

Californians share a wholly unique lifestyle and attitude that **celebrates diversity** and **champions being open-minded**.

That's why California has always been a **magnet for dreamers** and their dreams. Here, we welcome the promise of possibility — of living life to the fullest and **exploring what's next**. Here, California's creative, free-spirited, fun-loving, **anything-is-possible vibe** is an open invitation to all.

We're up for whatever goofy or grand, serious or silly, life-changing or afternoon-changing dream you dream up. Because in California, all dreams are welcome. So, **dream big**.

California PME Brand

Californians share a wholly unique lifestyle and attitude that celebrates diversity and champions an **anything-is-possible mindset**.

Here, California's **abundance** brings variety of venue, landscape and experience together with unbridled sunshine and a welcoming spirit.

That's why California is a **magnet for meetings** of all types and sizes. Here, we embrace all perspectives, sharing a **culture of inclusivity and collaboration** that fuels **innovation** and **entrepreneurship**.

California has a steadfast commitment to **stewardship** and **success**, and an open invitation to **meet what's possible**.

The current PME brand positioning generated a very positive response among planners, aligning with their perceptions of California meetings.

Most of the PME positioning statement aligned with planner perceptions.

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"People love the 'anything is possible' mindset as that is indicative of progress, forward, out-of-the-box thinking that all my clients want!"

"Other states will have small pockets of inclusivity, but in my mind, the entire state of California provides an inclusive environment."

The last line was seen not to fit tonally, and many did not understand what was meant by stewardship.

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"I feel this seems so formal and stuffy, compared to all the other descriptions."

"I think it should say something about being a leader in eco-friendly practices."

70% of planners felt “Meet What’s Possible” aligned with California as a PME destination.

It clearly communicates an aspirational side of the brand, as well as a more functional offering.

“I kinda love this statement! I think it is clever and inspirational.”

“Tells me that you’re innovative and out-of-the box thinkers, with the desire to meet client need, even if atypical.”

“Anything can be done there...they have the weather, activities, terrain, etc. available at any time of the year.”

“I feel like anything is possible. If you want to have a big extravagant meeting or a small intimate setting you can do it all.”

Planner-validated PME Positioning

CALIFORNIA Meet What's Possible

ABUNDANCE of diverse, unique meeting venues and locales (cities, mountains, wine country, natural outdoor splendor)



Open-minded, progressive, with an **ANYTHING-IS-POSSIBLE ATTITUDE**



History of a pioneering spirit and **INNOVATIVE APPROACH** to doing business



WIP to be developed

Fearless Inspiration > towards one's colleagues, work/industry, and the future



Planning Process, Barriers & Communications

California is seen as a good fit for all meeting types and sizes.

*“I think it is a good fit for most meetings. California has so many diverse cities and each one has their own personality. I think **every type of group can find a California destination that would be a good fit for their group.**”*

California has a clear competitive advantage...

- 1 Incentive and corporate groups** because of the state’s status as high-end/luxury destination; bucket list
- 2 Certain types of groups or companies who align with the state’s DNA** (i.e., green, tech, innovation, creative, health/wellness)

Selling California to delegates...

- **Planners primarily tout California's core attributes when appealing to delegates (i.e., climate, outdoor recreation)**
- Others remind delegates that its ideal to extend a trip for leisure
- Remind about functional necessities like accessibility
- Some say they don't have to sell it
- A few also highlight California's unique point of view (i.e., creativity, innovation, open-mindedness, etc.)
 - *"Always an exciting, cutting-edge location with new adventures of every stripe awaiting them."*
 - *"Open your minds to a new way of thinking!"*
 - *"I don't think I would have to say much at all. The state speaks for itself!"*

Key barriers to choosing California as a PME destination...

Primary Barriers

- Travel distance to California (especially from East Coast)
- Expensive/cost

Secondary Barriers

- Travel distance once within California to destinations
- Homelessness, wildfires, traffic, not being perceived as good for business anymore with California businesses leaving the state (noted by a couple planners)

Role of Visit California (State DMO)

CVBs viewed as critical resources for planners.

Over 70% of planners we talked to **use CVBs.**

They are viewed as **local experts** and **helpful partners** in the planning process.

*“I like working with CVBs because they are **the experts in their cities** and surrounding areas. They **are great to partner** with before, during and after an event. They can put you in contact with great local vendors and offer great suggestions. They also help take a lot of stress and time off my plate.”*

*“I always use the CVB! **They are a huge asset to any city**, and I would not send out a lead without copying the CVB. Primary benefit is their **insider knowledge** and **assistance** with the most incentive and **cost savings.**”*

Visit California role in planning process: aggregator, facilitator & connector.

“An online tool, possibly a VisitCA.com type of portal for CVBs, planners, etc. to go to with information on major cities, airports, etc.”

“A site like Visit California for planners where you can access all CVB information and beyond.”

Planners suggested state-level website/information portal to:

- ✓ Help **make planners aware** of all that is on offer
- ✓ **Keep planners informed** of new options, information or lesser-known locales
- ✓ **Make connections** – most importantly with CVBs who are already very important

Critical Communication Points

IMMEDIATE/NOW

Issues driven by COVID – like safety, capacity, local laws and protocols – continue to be key to ongoing communication with planners.

“Right now, COVID-19 protocols and how they vary across different counties in a clear and concise way.”

MOVING FORWARD

Efforts to revitalize and re-engage California’s urban core.

“Remodeling plans of major venues, downtown revitalization efforts in major cities (particularly as we come out of the pandemic and many major downtown areas are still fairly quiet).”

And keeping planners up to date on what’s new and improved.

“Updates on such things as renovations, new choices, something new in the marketplace, etc.”

“Updates on renovations, space being added, hotels being added, center renovations, new airport lift.”



Summary of Key Findings

PME Research Key Findings

1

Positive sentiment toward PME brand which shares incredibly strong synergistic relationship with the Leisure brand.

2

Meet What's Possible and PME positioning statement resonated with planners and was seen to communicate key attributes and bring to life the more aspirational side of the brand.

3

Sustainability surfaced as as unique to California – it is a differentiator and provides a distinct emotional benefit.

4

California is uniquely positioned to deliver on the meetings of the future: tech, outdoors, green, inclusive.

5

The state is seen to have an important role in the planning process serving as facilitator, aggregator and connector.



Appendix

Values associated with California generated robust and emotional responses from planners.

LEISURE BRAND

- *“Fairness, equality.”*
- *“Open-minded and welcoming all kinds.”*
- *“Health, ‘Green,’ Equality.”*
- *“Freedom, creativity, health conscious/wellness, innovation, diversity, open-minded, fun, entertaining.”*
- *“Caring about the environment, passion for living authentically.”*
- *“Live and let live. Progressive. Inclusion. Environmental protection.”*
- *“Growth, boldness, responsibility, creative.”*

PME BRAND

- *“Creativity, openness/hospitality.”*
- *“Freedom, Choice, Balance, Healthy, Quality.”*
- *“Freedom, connection, creativity, humanity.”*
- *“Sustainability, positive/laid back mentality, inclusivity, creativity.”*
- *“Diversity and inclusivity.”*
- *“Forward thinking. Community. Warmth.”*
- *“Attendee Experience, Environmentally-friendly, Inclusive.”*
- *“Inclusivity and sustainability.”*

PME Brand Positioning

Meet What's Possible

Abundance of diverse, unique meeting venues and locales (cities, mountains, wine country, natural outdoor splendor)

Open-minded, progressive, with an anything-is-possible **attitude**

History of a pioneering spirit and **innovative approach** to doing business

California delivers a meetings experience that connects, inspires and unlocks possibilities and potential.

Benefit: Fearless Inspiration □ towards one's colleagues, work/industry, and the future

Dream Big Platform

Celebrates diversity, champions being open-minded



Magnet for dreamers



Exploring what's next



Anything is possible vibe



Meetings Translation

A culture of INCLUSIVITY & COLLABORATION

MAGNET FOR MEETINGS
(Abundance / Product Choices / Climate)

INNOVATION & ENTREPRENEURSHIP
(i.e., Safety / Tech)

ANYTHING-IS-POSSIBLE MINDSET
(Optimism / Fresh Perspective / Engagement towards one's work and with colleagues)