



SAN LUIS OBISPO COUNTY
CALIFORNIA

Brand Lift Tracking Study

~Wave 1~

February 2017

Introduction

Research Objectives

- Three-wave tracking survey to measure consumer awareness of recent advertising and the impact of recent advertising on likelihood to visit San Luis Obispo County for leisure/vacation travel.

This report is for Wave 1 - benchmark phase (pre-advertising).

Sampling

- ✓ **Research Now Online Panel**
- ✓ **Total sample size:** n=1498
 - 500 age 25-34/45-54 in Los Angeles area
 - 377 age 25-44 in San Francisco area
 - 167 age 25-44 in Seattle area
 - 201 age 25-44 in Las Vegas area
 - 253 age 35-54 in Phoenix area
- ✓ **Qualification Criteria**
 - Household income \$75,000+
 - Plan to take at least one US leisure trip in next 12 months
 - Age 0-24 and 55+ excluded for all markets

Methodology

- ✓ **Survey Conducted:**
 - Jan 23 - Feb 6, 2017
- ✓ **Median Length of Interview:**
 - 15 minutes



Key Findings



- **Two in five survey respondents (41%) have visited San Luis Obispo County in the past; overall, the Far Western states are the most visited for vacations (63%).**
 - Future consideration of San Luis Obispo County is high with almost half (49%) very likely to consider traveling to San Luis Obispo County for vacation in the next 24 months.

- **Nearly two in five (39%) have seen, read or heard some form of advertising about San Luis Obispo County in the past six months.**
 - Most (55%) saw, read or heard about San Luis Obispo County in a social media.
 - The advertising had impact with 47% of those advertising-aware visiting San Luis Obispo County and another 39% taking steps to learn more.

- **All of the tested concepts were well-received.**
 - Of the three banner ads, the Kayak ad is preferred to the other two. For the videos, the Sunset video is only slightly preferred to the Cliff Road video.



- **The advertising resulted in some lift in terms of creating interest.**



- The likelihood of considering travel to San Luis Obispo County in the next 24 months for vacation increased from 49% (very likely) to 52% after viewing the three banner ads and two videos.
- The most lift occurred in the geo areas with the lowest likelihood: Las Vegas and Phoenix (+8 points).
- The increase in likelihood is consistent with other survey findings; those who claimed they were unlikely to visit gave a lack of information about the area as their top reason (53%).

Concept Summary

	Banner Ads			Videos	
	<u>Kayak</u>	<u>Pier</u>	<u>Wine</u>	<u>Sunset</u>	<u>Cliff Road</u>
Very appealing	51%	50%	44%	53%	52%
Made me interested in visiting	51%	50%	46%	53%	51%
Most preferred of the ads (#1)	43%	36%	20%	51%	49%



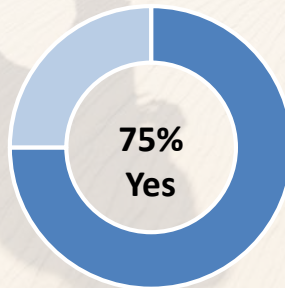
***Familiarity with San
Luis Obispo County***

Familiarity with San Luis Obispo County

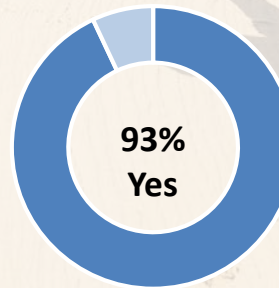
(Total Respondents)



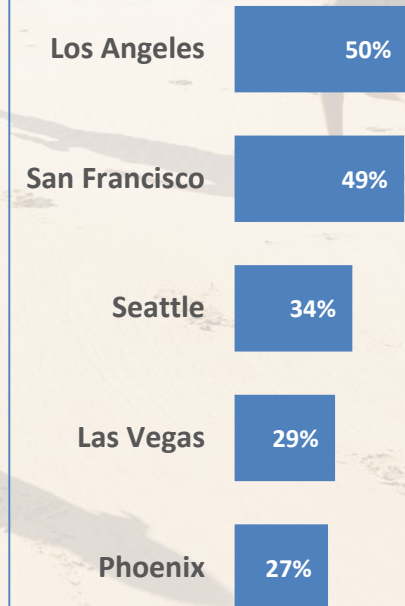
Would you be interested in visiting?



Would you be interested in visiting again?



% Have Visited by Region

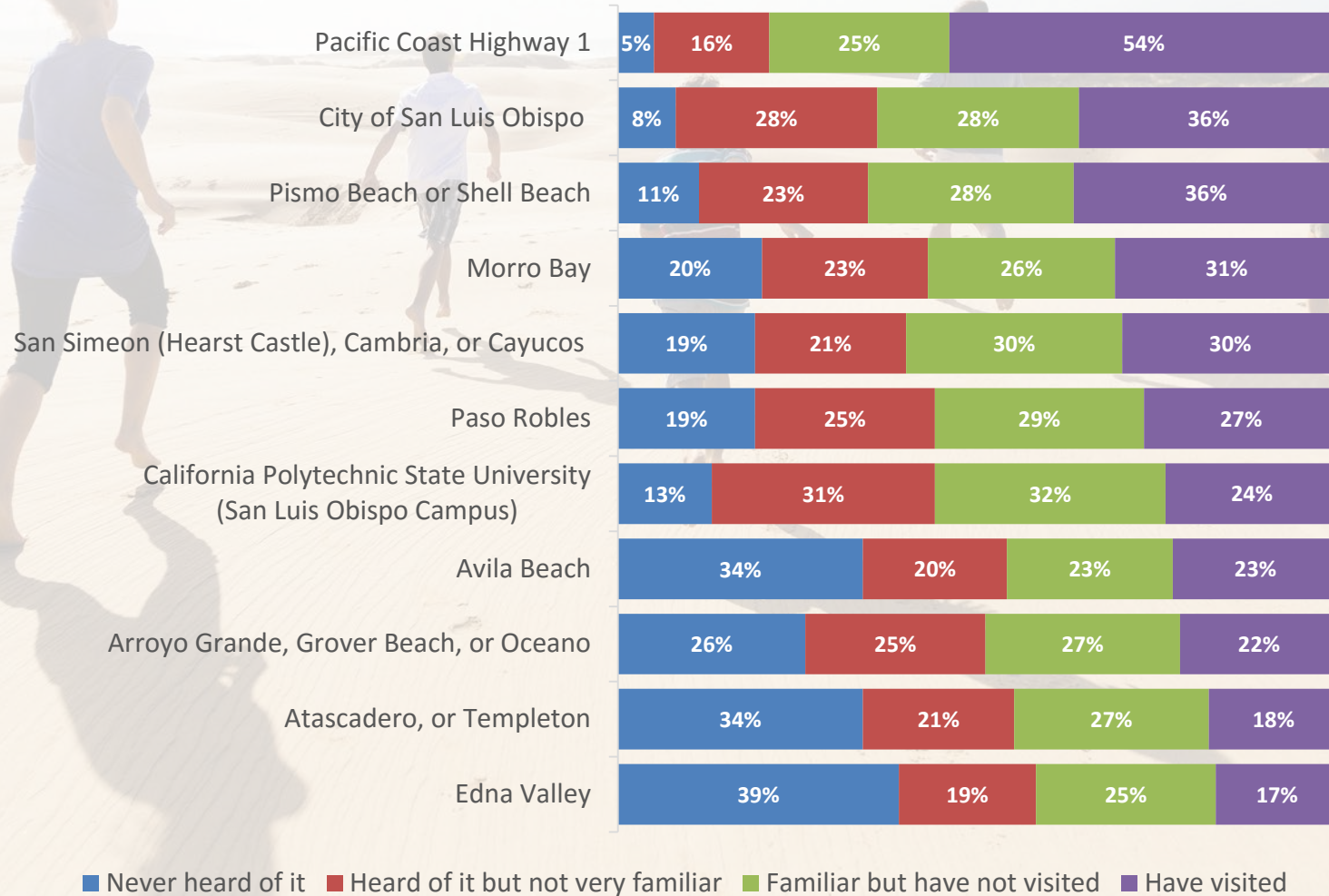


Q6. How familiar are you with San Luis Obispo County in California?

Q7A/B. Would you be interested in visiting San Luis Obispo County in California?/Would you be interested in visiting San Luis Obispo County again?

Familiarity with Locations in San Luis Obispo County

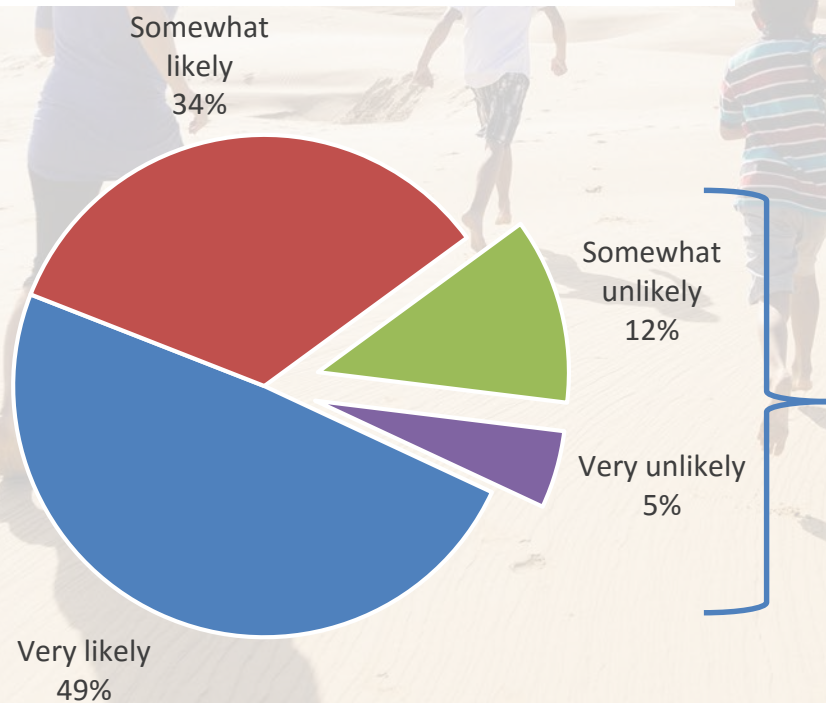
(Total Respondents)



Q8. How familiar are you with the following locations in San Luis Obispo County?

Likelihood To Visit in Next 24 Months For Leisure or Vacation Purposes

(Total Respondents)



Reasons Why Unlikely to Visit

(Base=Very/Somewhat Unlikely; Multiple Responses)

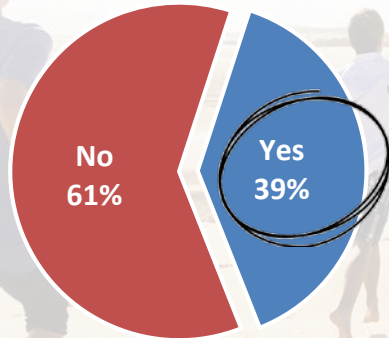
Don't know enough about the area	53%
Not enough to do there	24
Other destinations are closer	19
Other destinations are easier to get to	19
Other destinations offer a higher quality experience	19
Lacks experiences that are important to me	19
Other destinations offer a better family experience	17
Been there many times before	6
Doesn't provide a good value for the money	4
Doesn't offer a luxury accommodation experience	3
Weather isn't what I like	2
Some other reason	11

Q9. How likely would you be to consider visiting San Luis Obispo County in California in the next 24 months for leisure or vacation purposes?

Q10. Why are you unlikely to visit San Luis Obispo County for leisure/vacation in the next 24 months?

Seen/Read/Heard Advertising about Visiting San Luis Obispo County in Past 6 Months

(Total Respondents)



What?



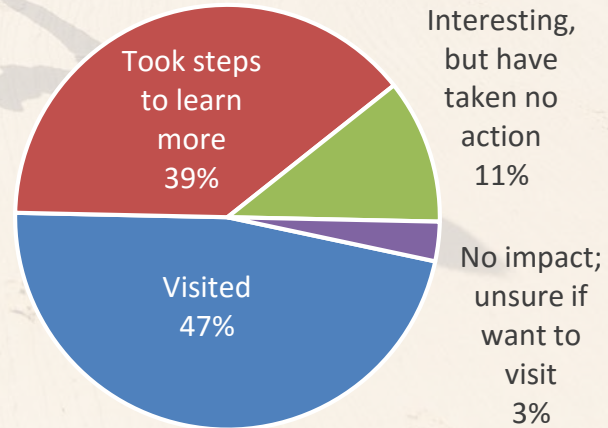
Where?

(Base=Advertising Aware; Multiple Responses)

Social media (Facebook, Twitter, etc.)	55%
Online website	49%
TV	47%
Online video	33%
Radio	30%
Print magazine	28%
Visitors Guide	23%
Online banner ad	22%
Online pop-up	22%
Print newspaper	21%
Flyer/brochure in the mail	19%
Outdoor billboard	17%
Bus/train/subway	16%
Other (please specify)	1%
Don't remember	0%

Impact

(Base=Ad Aware)



Q11. Q11. Have you seen, read or heard any advertising about visiting San Luis Obispo County in the past six months?

Q12. Where have you seen, read or heard advertising about visiting San Luis Obispo County in the past six months?

Q13. What specifically do you recall about the advertising you saw, read or heard?

Q14. Did the advertising that you experienced have any impact on your impressions or consideration of San Luis Obispo County as a travel destination?

Advertising Concepts

Three Banner Ads & Two Videos

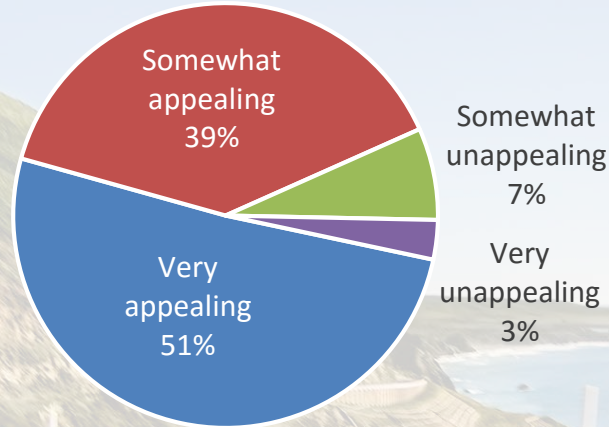


Banner Ad A



Appeal of Ad

(Total Respondents)



Describe Destination

(Total Respondents; % Selecting; Up to Five)

53%	Outdoors	18%	Unique
50	Exciting	16	For someone like me
48	Fun	15	Happy
41	Natural	13	Inviting
22	Calm	12	Casual
22	Engaging	4	Boring
22	Refreshing	4	Romantic
18	Friendly	4	Not for me
18	Family	2	Ordinary

Strong Agreement

(Total Respondents; % 9-10 on 10-Point Scale)

The visual description in this ad makes me interested in traveling to this destination.	51%
This destination is relevant to me.	48
This ad is believable.	48
I enjoyed seeing this ad.	48
This ad makes me want to learn more about this location.	47
The concepts conveyed by this ad are meaningful to me.	44
After seeing this ad, I am more likely to visit this destination.	44
This location is unique and different.	44
This ad provides information I did not know before.	42
This ad would convince me to visit the booking website for this travel destination.	41

Q15. After reviewing the ad, how much does this leisure travel destination appeal to you?

Q17. After reviewing the ad, how strongly do you agree or disagree...

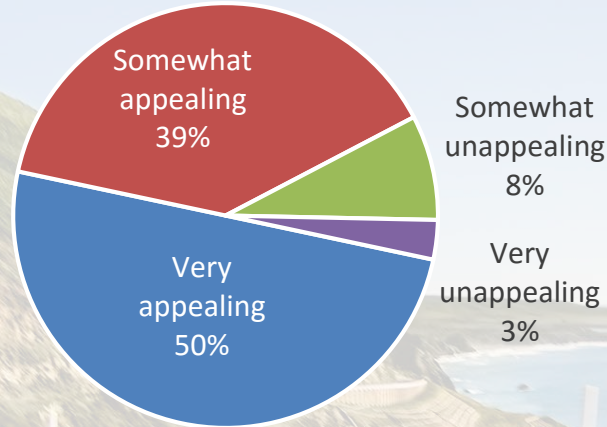
Q18. Based on the advertisement you just saw, which of the following characteristics best describe this destination?

Banner Ad B



Appeal of Ad

(Total Respondents)



Describe Destination

(Total Respondents; % Selecting; Up to Five)

61%	Calm	18%	For someone like me
38	Outdoors	17	Exciting
34	Romantic	17	Fun
32	Casual	17	Inviting
31	Natural	10	Engaging
25	Family	8	Unique
20	Happy	6	Boring
20	Refreshing	4	Ordinary
19	Friendly	3	Not for me

Strong Agreement

(Total Respondents; % 9-10 on 10-Point Scale)

The visual description in this ad makes me interested in traveling to this destination.	50%
This destination is relevant to me.	47
This ad is believable.	47
I enjoyed seeing this ad.	45
After seeing this ad, I am more likely to visit this destination.	44
This ad makes me want to learn more about this location.	43
This ad would convince me to visit the booking website for this travel destination.	41
This location is unique and different.	40
This ad provides information I did not know before.	35
The concepts conveyed by this ad are meaningful to me.	22

Q15. After reviewing the ad, how much does this leisure travel destination appeal to you?

Q17. After reviewing the ad, how strongly do you agree or disagree...

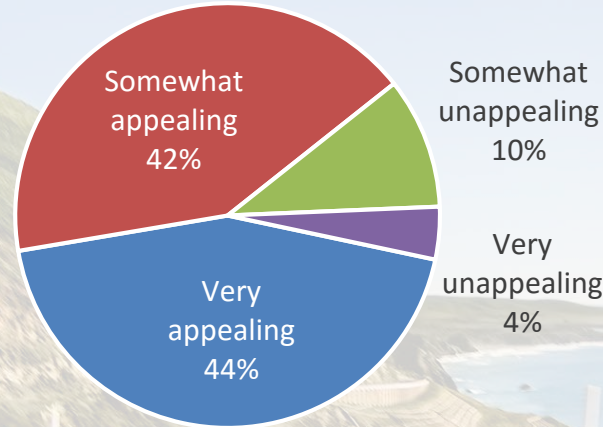
Q18. Based on the advertisement you just saw, which of the following characteristics best describe this destination?

Banner Ad C



Appeal of Ad

(Total Respondents)



Describe Destination

(Total Respondents; % Selecting; Up to Five)

48%	Calm	17%	Family
41	Romantic	17	Inviting
34	Outdoors	16	For someone like me
31	Casual	16	Refreshing
29	Natural	13	Engaging
23	Friendly	9	Unique
23	Happy	6	Boring
22	Fun	5	Not for me
18	Exciting	4	Ordinary

Strong Agreement

(Total Respondents; % 9-10 on 10-Point Scale)

The visual description in this ad makes me interested in traveling to this destination.	46%
This destination is relevant to me.	45
This ad is believable.	44
I enjoyed seeing this ad.	41
This ad makes me want to learn more about this location.	41
The concepts conveyed by this ad are meaningful to me.	40
After seeing this ad, I am more likely to visit this destination.	40
This ad would convince me to visit the booking website for this travel destination.	39
This location is unique and different.	38
This ad provides information I did not know before.	35

Q15. After reviewing the ad, how much does this leisure travel destination appeal to you?

Q17. After reviewing the ad, how strongly do you agree or disagree...

Q18. Based on the advertisement you just saw, which of the following characteristics best describe this destination?

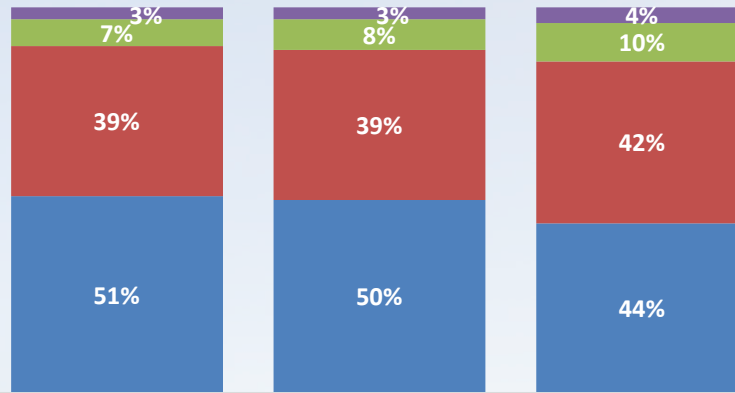
-Comparison-
Appeal of Banner Ads
(Total Respondents)



A

B

C



Banner Ad A

Banner Ad B

Banner Ad C

Very unappealing
 Somewhat unappealing
 Somewhat appealing
 Very appealing

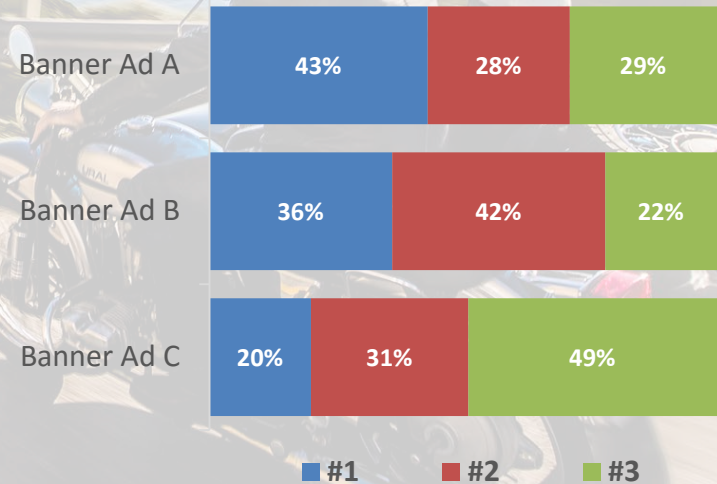
Strong Agreement

(Total Respondents; % 9-10 on 10-Point Scale)

	A	B	C
The visual description in this ad makes me interested in traveling to this destination.	51%	50%	46%
This destination is relevant to me.	48	47	45
This ad is believable.	48	47	44
I enjoyed seeing this ad.	48	45	41
This ad makes me want to learn more about this location.	47	43	41
The concepts conveyed by this ad are meaningful to me.	44	22	40
After seeing this ad, I am more likely to visit this destination.	44	44	40
This location is unique and different.	44	40	38
This ad provides information I did not know before.	42	35	35
This ad would convince me to visit the booking website for this travel destination.	41	41	39

Ranking by Preference

(Total Respondents; #1=Most Preferred)



#1 #2 #3

Q15. After reviewing the ad, how much does this leisure travel destination appeal to you?

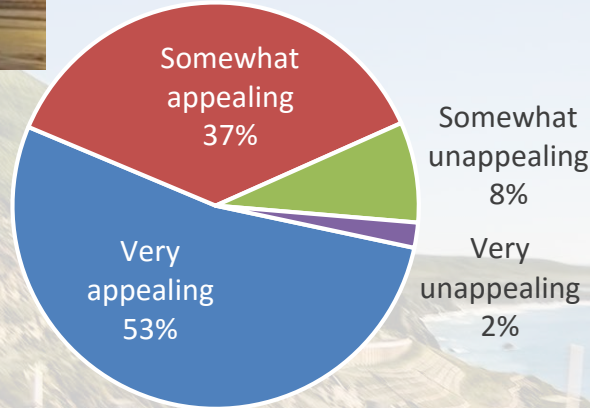
Q17. After reviewing the ad, how strongly do you agree or disagree...

Q19. Please rank the three ads that you reviewed with "1" identifying the one you prefer the most.

Video Ad A



Appeal of Ad (Total Respondents)



Describe Destination

(Total Respondents; % Selecting; Up to Five)

48%	Outdoors	18%	Casual
46	Exciting	16	For someone like me
46	Fun	16	Inviting
28	Natural	16	Refreshing
24	Calm	14	Romantic
24	Friendly	13	Unique
24	Family	4	Boring
20	Happy	4	Not for me
19	Engaging	2	Ordinary

Strong Agreement

(Total Respondents; % 9-10 on 10-Point Scale)

The visual description in this ad makes me interested in traveling to this destination.	53%
This destination is relevant to me.	51
This ad is believable.	50
I enjoyed seeing this ad.	49
This ad makes me want to learn more about this location.	48
After seeing this ad, I am more likely to visit this destination.	48
The concepts conveyed by this ad are meaningful to me.	47
This location is unique and different.	47
This ad would convince me to visit the booking website for this travel destination.	46
This ad provides information I did not know before.	44

Q15. After reviewing the ad, how much does this leisure travel destination appeal to you?

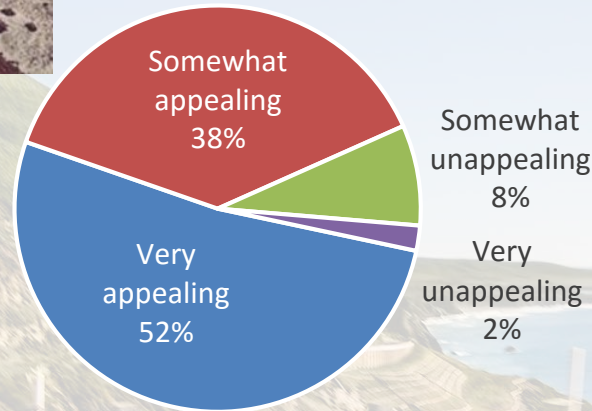
Q17. After reviewing the ad, how strongly do you agree or disagree...

Q18. Based on the advertisement you just saw, which of the following characteristics best describe this destination?

Video Ad B



Appeal of Ad (Total Respondents)



Describe Destination

(Total Respondents; % Selecting; Up to Five)

43%	Outdoors	16%	Inviting
42	Fun	16	Refreshing
36	Exciting	16	Engaging
35	Family	15	For someone like me
30	Calm	13	Romantic
28	Friendly	12	Unique
25	Natural	6	Boring
20	Happy	4	Ordinary
20	Casual	4	Not for me

Strong Agreement

(Total Respondents; % 9-10 on 10-Point Scale)

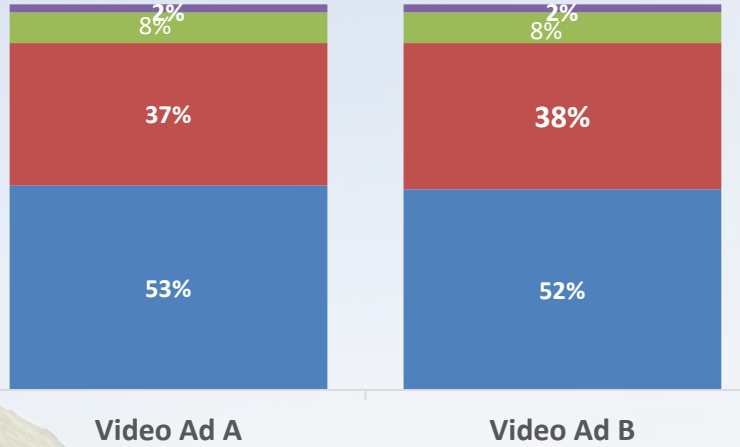
The visual description in this ad makes me interested in traveling to this destination.	51%
This destination is relevant to me.	49
This ad is believable.	49
I enjoyed seeing this ad.	47
The concepts conveyed by this ad are meaningful to me.	46
After seeing this ad, I am more likely to visit this destination.	46
This ad makes me want to learn more about this location.	44
This location is unique and different.	44
This ad provides information I did not know before.	43
This ad would convince me to visit the booking website for this travel destination.	43

Q15. After reviewing the ad, how much does this leisure travel destination appeal to you?

Q17. After reviewing the ad, how strongly do you agree or disagree...

Q18. Based on the advertisement you just saw, which of the following characteristics best describe this destination?

-Comparison-
Appeal of Video Ads
(Total Respondents)

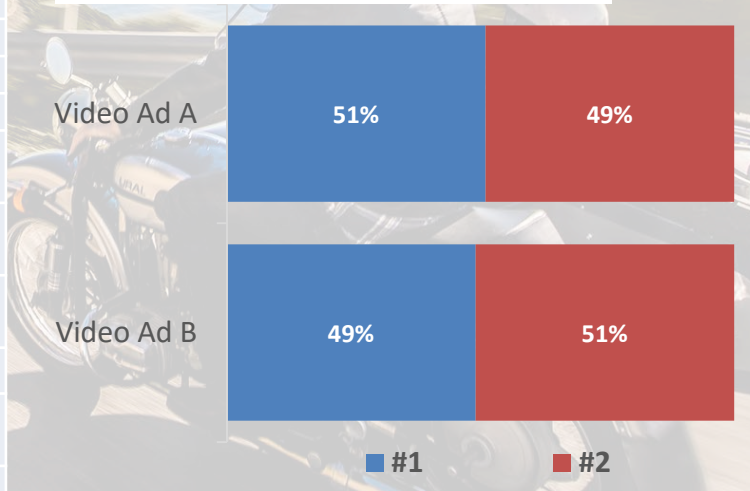


- Very unappealing
- Somewhat unappealing
- Somewhat appealing
- Very appealing

Strong Agreement
(Total Respondents; % 9-10 on 10-Point Scale)

	A	B
The visual description in this ad makes me interested in traveling to this destination.	53%	51%
This destination is relevant to me.	51%	49%
This ad is believable.	50%	49%
I enjoyed seeing this ad.	49%	47%
This ad makes me want to learn more about this location.	48%	44%
After seeing this ad, I am more likely to visit this destination.	48%	46%
The concepts conveyed by this ad are meaningful to me.	47%	46%
This location is unique and different.	47%	44%
This ad would convince me to visit the booking website for this travel destination.	46%	43%
This ad provides information I did not know before.	44%	43%

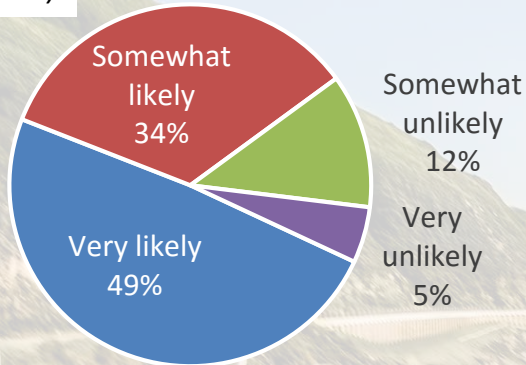
Ranking by Preference
(Total Respondents; #1=Most Preferred)



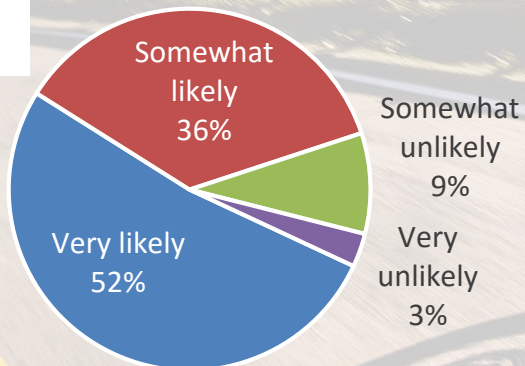
Q15. After reviewing the ad, how much does this leisure travel destination appeal to you?
 Q17. After reviewing the ad, how strongly do you agree or disagree...
 Q20. Please rank the two video ads that you reviewed with "1" identifying the one you prefer the most.

**Likelihood To Visit in Next 24 Months
For Leisure or Vacation Purposes
(Total Respondents)**

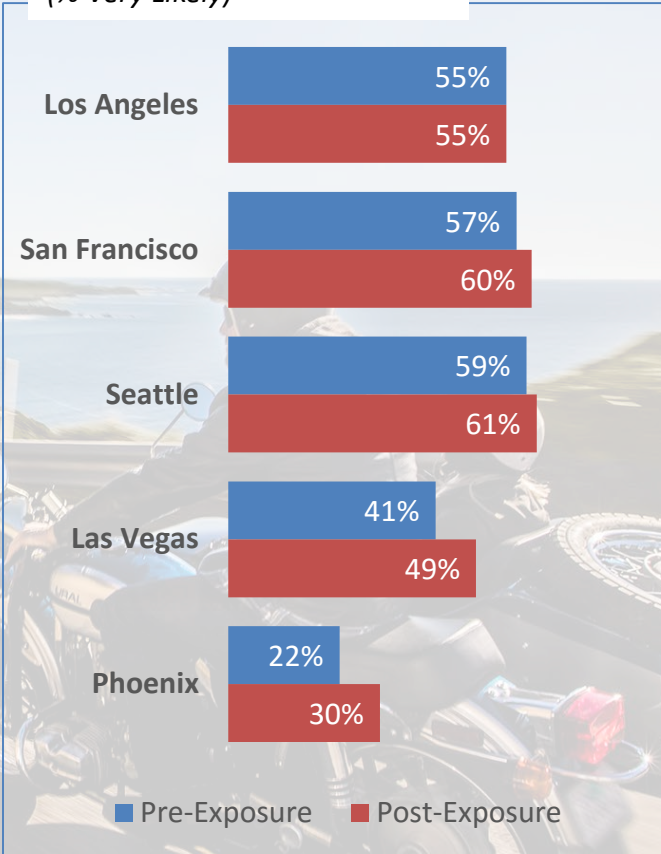
**Pre-Exposure
(Total Respondents)**



**Post-Exposure
(Total Respondents)**



**Pre/Post Likelihood by Region
(% Very Likely)**



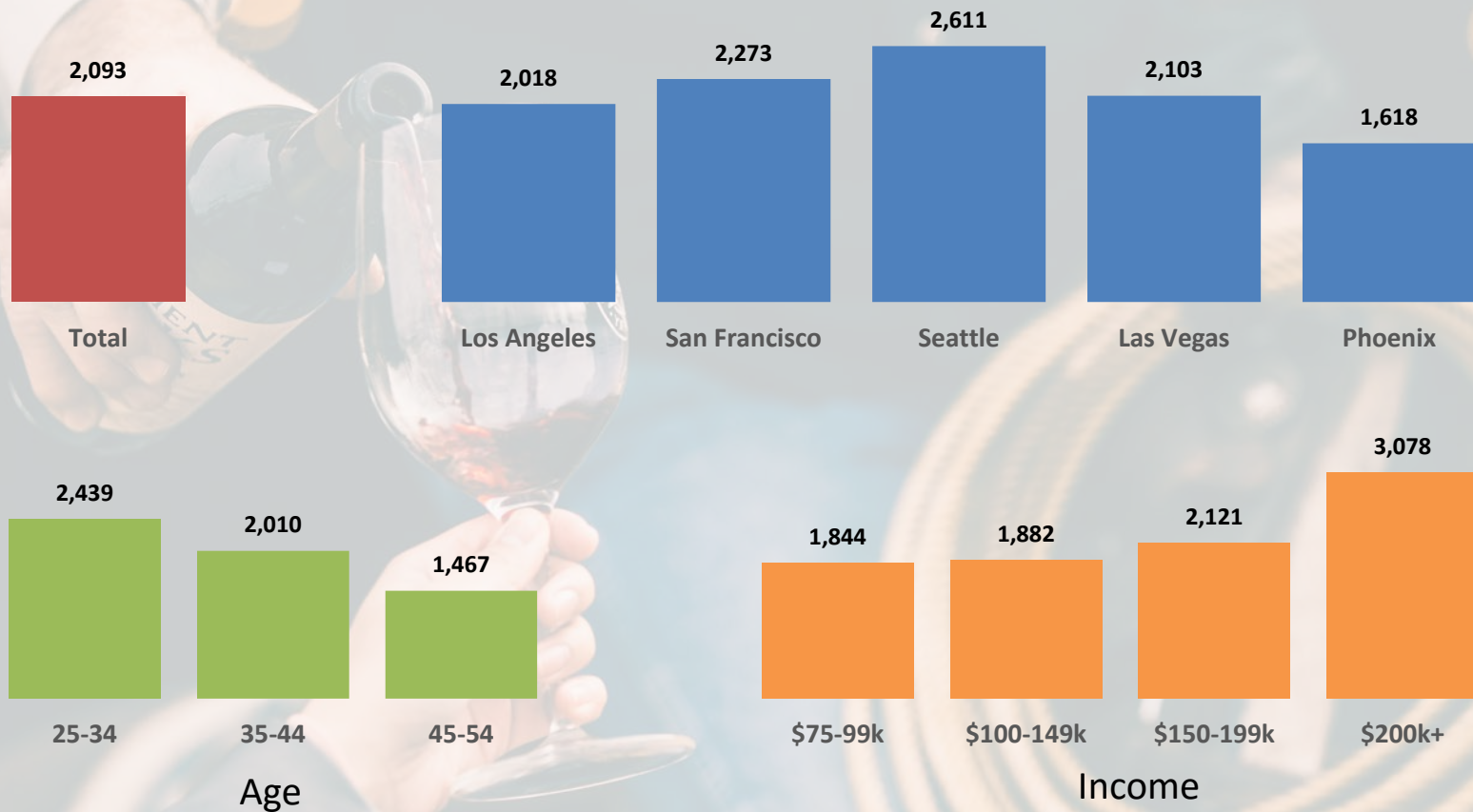
Q9. How likely would you be to consider visiting San Luis Obispo County in California in the next 24 months for leisure or vacation purposes?
 Q21. After seeing the advertisements, how likely would you be to consider visiting San Luis Obispo County in California for a trip or vacation in the next 24 months?



***Leisure Travel
Behavior &
Preferences***

Average (Mean) Spending per Person per Trip by Segment (\$000)

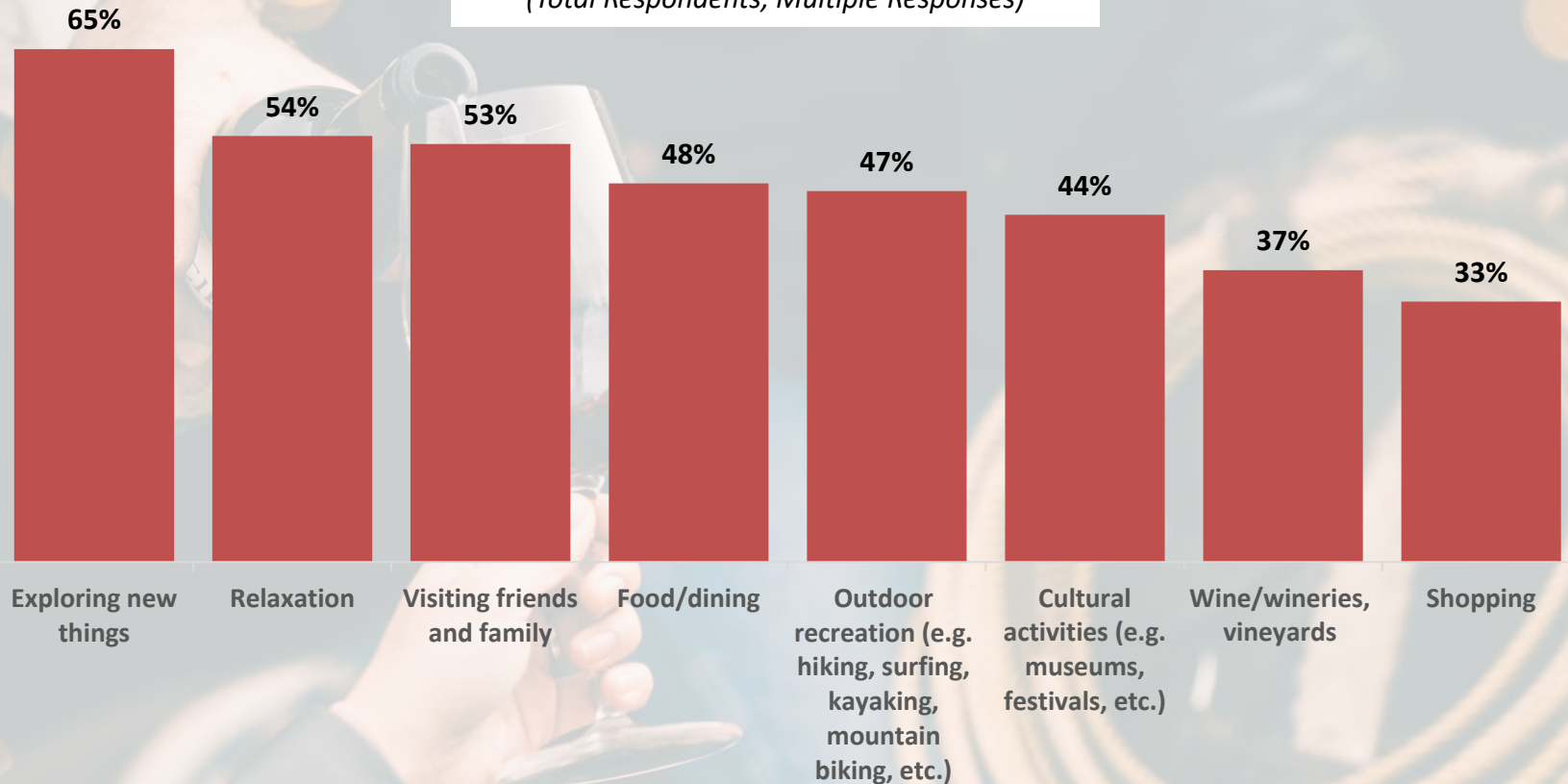
(Total Respondents)



Q23. On average, about how much do you typically spend per person when you take a leisure travel trip domestically (including all travel expenses like airfare, hotel, food, beverage, etc.)?

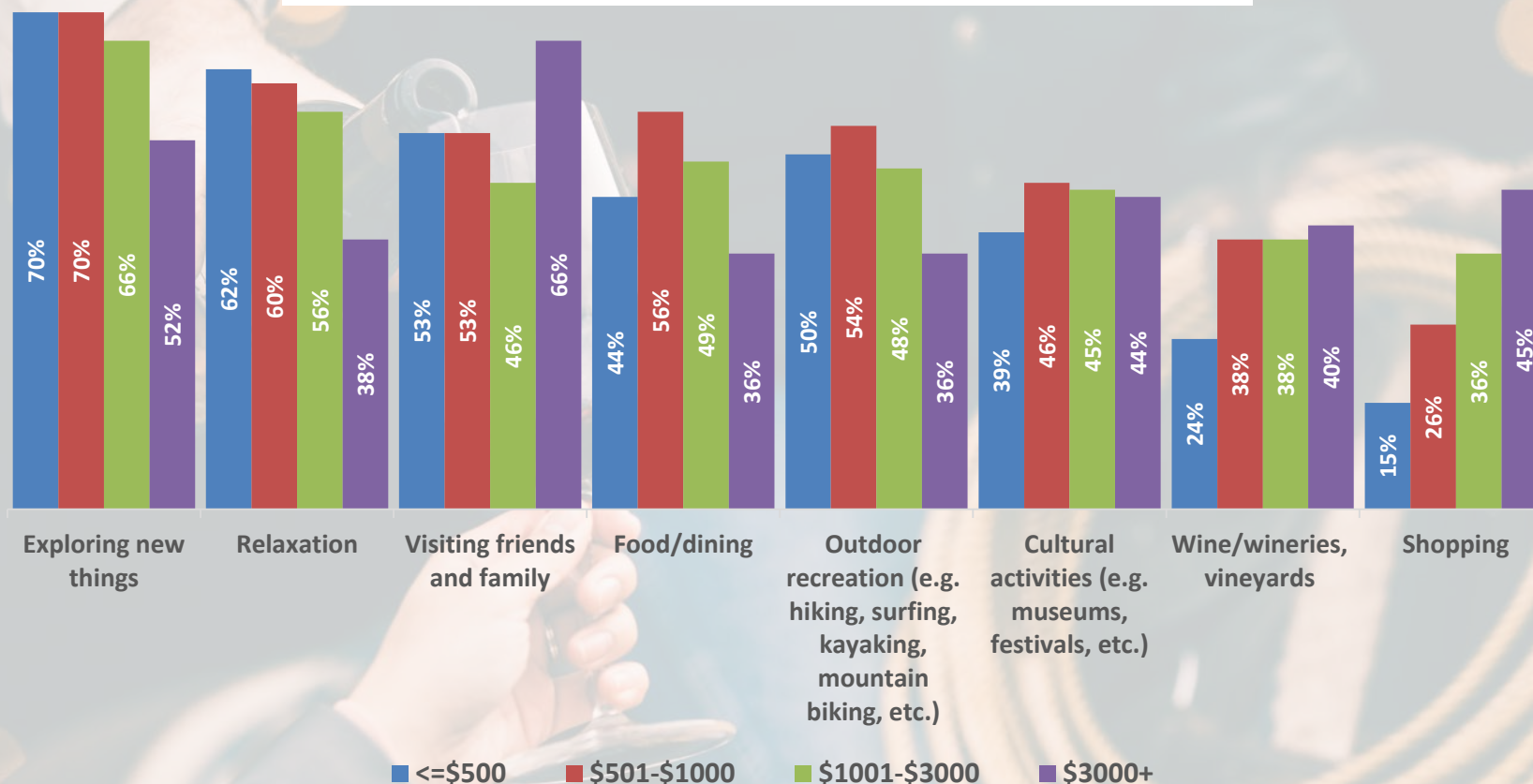
Important Activities when Traveling

(Total Respondents; Multiple Responses)



Q22. Which of the following are important to you when traveling domestically (in the US) for leisure?

Important Activities by Travel Spend per Person per Trip (Total Respondents)

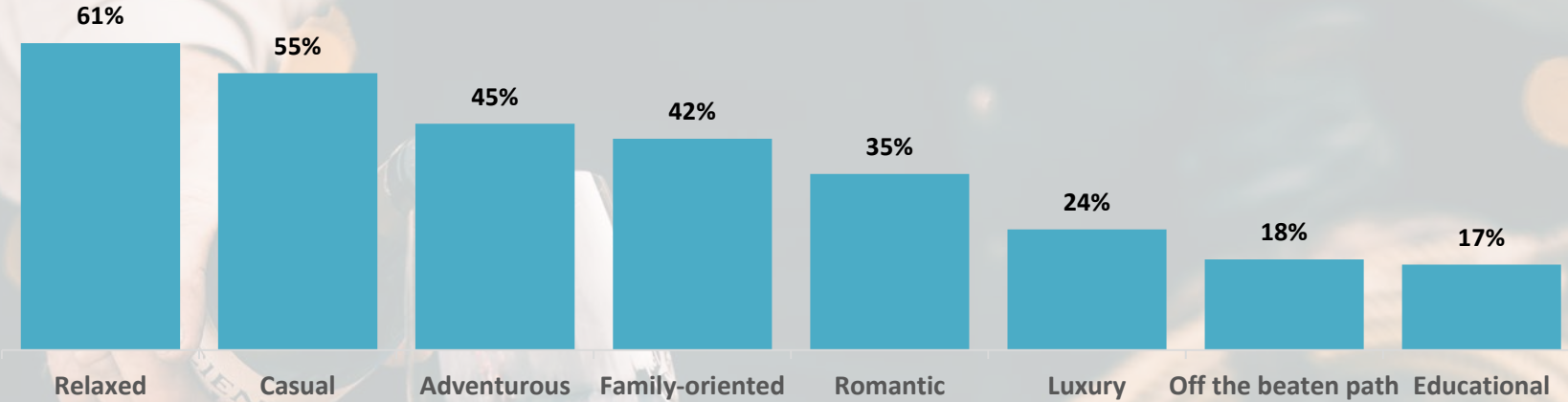


Q22. Which of the following are important to you when traveling domestically (in the US) for leisure?

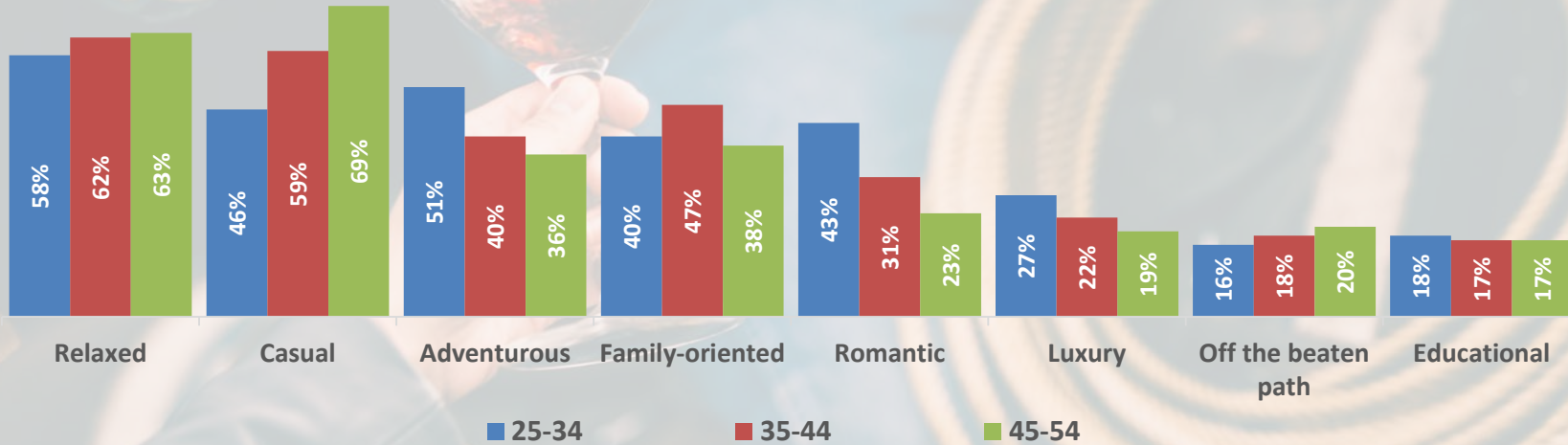
Style of Travel

(Total Respondents; Multiple Responses)

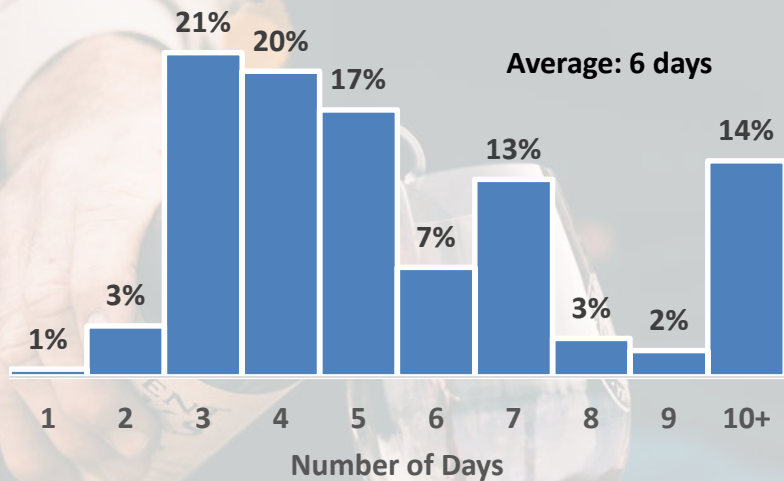
Total Respondents



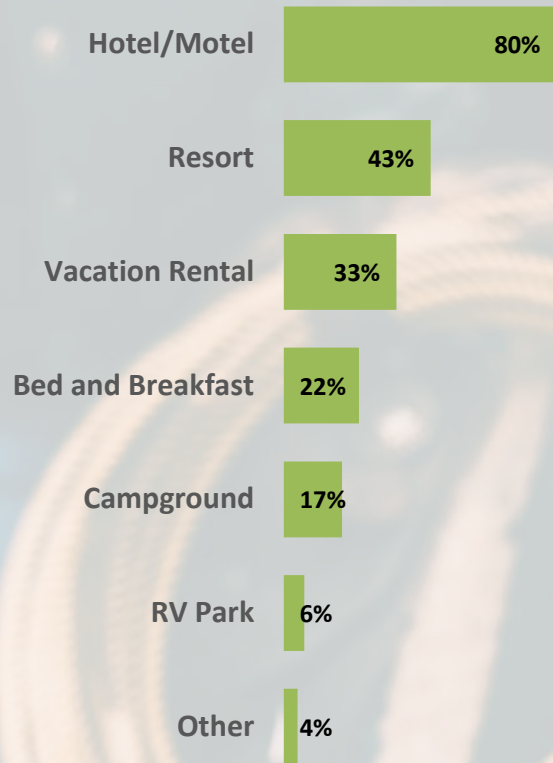
By Age



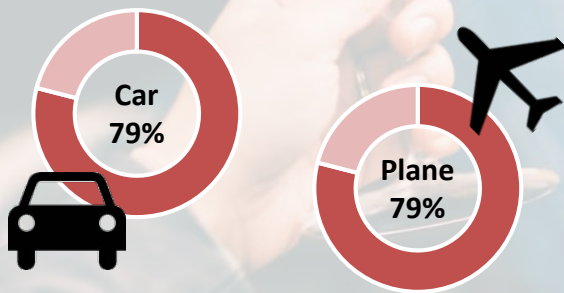
Number of Days - US Leisure Trips
(Total Respondents)



Typical Type of Accommodation
(Total Respondents; Multiple Responses)



Modes of Travel
(Total Respondents; Multiple Responses)



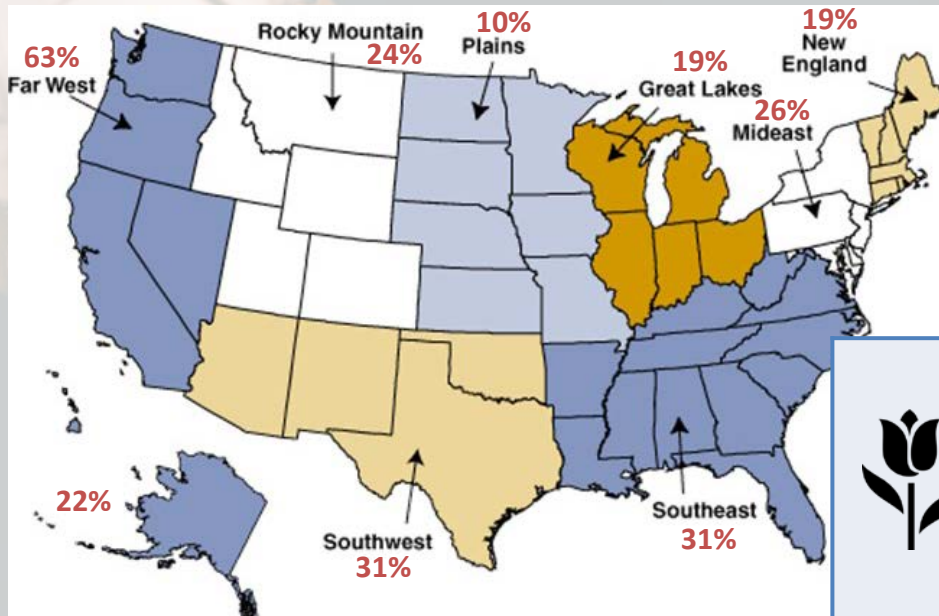
Q25. On average, about how long, in terms of days, are your US leisure travel trips?

Q26. When you travel domestically for leisure, which of the following modes of transportation do you take to get to the destination?

Q27. When you travel for leisure in the US, which of the following types of accommodation do you typically choose?





Destination of Leisure Travel Trips

(Total Respondents; Multiple Responses)



Time of Year for Leisure Travel

(Total Respondents; Multiple Responses)

	<p>Spring 58%</p>		<p>Summer 76%</p>
	<p>Fall 49%</p>		<p>Winter 33%</p>

Q28. In which of the following seasons do you typically take leisure travel trips to US locations?

Q29. Where in the US have you taken leisure/vacation travel trips in the past 24 months?



Demographics

Demographics

	Total	Los Angeles	San Francisco	Seattle	Las Vegas	Phoenix
n=	1498	500	377	167	201	253
Age (Q2)						
25-34	47%	63%	53%	55%	45%	-
35-44	32	-	47	45	55	46
45-54	21	37	-	-	-	54
Household income (Average) (\$000) (Q3)	135.7	134.8	140.7	145.1	122.8	134.5
# of overnight leisure trips taken in US past 12 months (Q4)						
0-1	16%	15	15	13	22	17
2	30	30	28	31	31	28
3+	54	55	57	56	47	55
# of overnight leisure trips taken in US past 12 months (Q5)						
0-1	14%	13%	13%	13%	17%	15%
2	29	29	29	30	30	28
3+	57	58	58	57	53	57
Marital status (Q32)						
Married or partnered	82%	81%	83%	91%	79%	82%
Single never married	14	15	16	8	18	10
Divorced, separated, widowed	4	4	1	1	3	8

Demographics

	Total	Los Angeles	San Francisco	Seattle	Las Vegas	Phoenix
n=	1498	500	377	167	201	253
Education (Q30)						
Grade school/Some high school	1%	1%	1%	0%	1%	1%
High school graduate	3	5	1	2	3	4
Some college	11	7	8	13	17	19
College graduate	46	48	49	40	50	36
Post graduate study, no degree	5	4	5	5	7	7
Post graduate degree	34	35	36	40	22	33
Employment status (Q31)						
Employed full-time	83%	82%	86%	81%	80%	81%
Employed part-time	9	11	10	11	8	8
Homemaker or stay-at-home parent	5	3	2	6	9	8
Student	1	1	0	1	0	1
Retired	1	1	1	0	1	1
Other	1	2	1	1	2	1
Travel with children (Q36)						
Travel with children	61%	59%	66%	74%	60%	51%
Do not travel with children	39	41	34	26	40	49

Demographics

	Total	Los Angeles	San Francisco	Seattle	Las Vegas	Phoenix
n=	1498	500	377	167	201	253
Ethnicity (Q33)						
White or Caucasian	76%	75%	69%	81%	72%	85%
African American or Black	3	3	3	1	4	3
Hispanic/Latino	9	10	7	9	8	10
Native American	1	0	0	1	1	2
Asian or Pacific Islander	16	15	24	13	18	7
Other	2	4	2	2	2	0
Refused	2	2	2	2	3	2
Sexual orientation (Q34)						
Heterosexual	91%	93%	90%	91%	86%	92%
LGBTQ	5	4	5	5	4	5
Refused	4	3	5	4	10	3
Number of people travel together (Q35)						
One	5%	6%	6%	4%	6%	5%
Two	39	40	34	33	37	49
Three	18	17	18	21	23	14
Four	27	29	29	31	23	21
Five or more	11	8	13	11	11	11