Strategic Marketing & Research, Inc.

California TRAVEL & TOURISM COMMISSION

California Snow Advertising Effectiveness Research Phase 1 Report

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BACKGROUND & OBJECTIVES

In part, due to recent changes in funding, the California Travel and Tourism Commission has been afforded the ability to increase its marketing and advertising efforts. On the one hand, this has meant that advertising and promotional campaigns could be geographically expanded beyond specific target markets to a national and even international focus. Additionally, this increased funding allowed for the development and strengthening of niche market segment efforts. The winter *snow skiing* promotions are an example of both a niche segment and geographic expansion. First targeted in 2006, the snow skiing campaign was limited to four target markets. With expanded resources, the campaign was broadened to a national level. This research represents the *awareness* wave of an advertising effectiveness program which fundamentally assesses the reach and initial attitudinal impacts of the campaign and evaluation of its appeal. A subsequent ROI wave of interviews will be conducted to determine the specific travel influence of the marketing. The key research objectives of this phase included the following:

- Assess effectiveness of the campaign in meeting its various goals, including consumer awareness, preference and actions;
- Determine how well the campaign sparked consumer interest to act and learn more about California as a premier winter travel destination;
- Compare levels of awareness in key competitor markets to determine if California has a sufficient "share of voice;"
- Assess consumers' reactions to both the ads of California and those of key competitors and explore whether the ads communicate the "California attitude" to consumers;
- Gauge the impact of the advertising on attitudes about California as a travel destination and link differences in attitudes to variations in preference and travel; and
- Provide insight and recommendations to help guide and refine future marketing campaigns.

SMARI has developed a research methodology based on the ways in which people make travel decisions. This methodology has been used to measure other California tourism advertising. The text below reviews each step of the process (on the left) and the "measure" used to evaluate the effectiveness of the State's marketing efforts. **In this Phase 1 research, the first four steps of the process are measured.** Phase 2 will be conducted to determine the level of incremental travel generated by the campaign.

Influence Process		**Measure**
Exposure	→	Advertising Awareness
Messaging	→	Creative Evaluation
Shift in Attitudes	→	Comparative Image Assessments
Build Interest	→	Comparative Interest in Visitation
Generate Travel	→	Incremental Travel

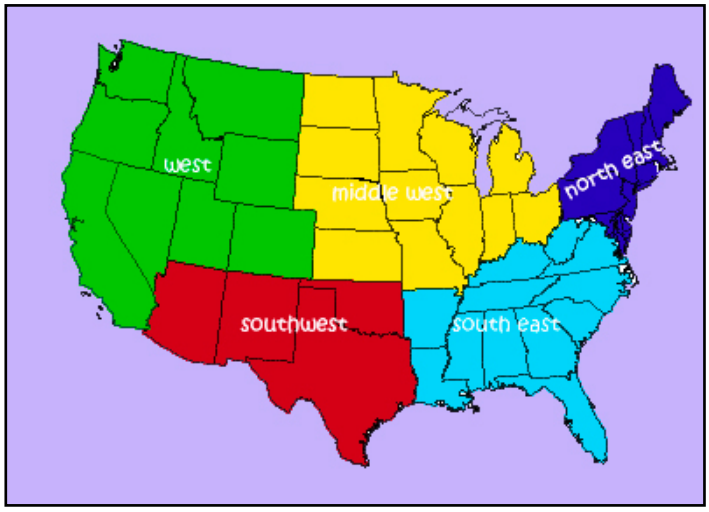
The following report summarizes the key findings from this research. Conclusions and recommendations are forwarded to guide future advertising campaign endeavors.

METHODOLOGY

An on-line survey allowed people to view various tourism ads and indicate their recall of each. SMARI finds that when surveying travelers, the on-line process provides a good and cost-effective approach to obtaining accurate and non-biased feedback about advertising awareness. To help mitigate bias, the California ads were shown along with competitive ads. In this study, each consumer saw the California ads and ads promoting winter activities from Colorado and Utah. Respondents reviewed the ads and answered questions about them and the States under consideration. Data collection occurred in December 2007, immediately following the launch of the campaign. A copy of the questionnaire appears in the Appendix.

SMARI worked with e-Rewards, a national vendor that maintains an extensive on-line panel of consumers who have agreed to complete surveys. In keeping with the national scope of this marketing effort, a nationally representative sample of people who are somewhat or very interested in skiing and snowboarding was surveyed. The sample respondents also had to meet other criteria: they had to earn $50,000 annually, be responsible for making travel decisions; and had to have taken or considered taking a snow vacation over the past 10 years. In addition, they had to normally take at least an overnight leisure trip 50 or more miles away from home each year. The goal was to obtain 600 surveys; a total of 623 surveys were completed.

While the survey represented a random sample of US traveling ski households, overall, the sample size was sufficient to allow for some regional comparisons to help determine the impact of this larger target. These regions and completed quotas appear below.



Completed Surveys	
Northeast	148
Southeast	125
Midwest	151
Southwest	75
West	116

Following data collection, the data were cleaned, coded, analyzed, and weighted to represent the overall population.

THE ADVERTISING CAMPAIGN

Before evaluating the Winter Snow campaign, its scope and a comparison to previous campaigns are discussed. The primary objective of the campaign was to increase California's market share of the destination skier market by increasing awareness of the State as a one-of-a-kind winter and snow sports destination, thus encouraging the target markets to choose California over Rocky Mountain destinations. However, in order to compete with states that have larger advertising budgets – namely Colorado and Utah – California focused its media on four specific markets. A larger budget allowed CTTC to expand its broadcast media buy to a national level, thus dramatically increasing the number of potential visitors who could be reached with a marketing message.

The campaign itself varied little from that of the prior year. The strategy of differentiating California by integrating its great snow sport offerings and diverse mountain ranges with the State's unique vibe and approach to life - "The California Attitude" – was continued

The campaign was launched in early October and ended in late December with a national cable buy which was rotated with the California attitude spot. Additional spot market buys were also launched beginning in November in select western, Southwest Airlines markets.

COMPETITIVE SITUATION

In last year's advertising research, a significant part of the initial research wave focused on identifying the image of California and that of its key competitors. The value of this effort allows for consideration not only of the relative strengths and weaknesses of the State in this particular niche, but for an evaluation of which attitudes were impacted by the communication efforts.

With the broadened focus of this year's campaign, there is value in again evaluating the same image considerations and reviewing the relative perception of California, its competitors and assessing in which ways this broader market differs from the prior target markets.

California's competition was evaluated relative to seven states that also offer strong winter products: Colorado, Idaho, Montana, Nevada, Utah, New York and Vermont. The respondents rated California and these competitors on nineteen (19) attributes. The ratings are based on a 5-point scale, where higher ratings indicate stronger performance. A rating of "4" or better is *excellent*, scores from "3.5 to 4.0" are considered *good*, and scores below "3.0" indicate *weak* performance. Along with the ratings, the table below lists an index which compares California's rating to the average rating for all the States. An index of "100" indicates an average rating; "105" indicates 5% above average; and "95" indicates 5% below average. Below are this year's ratings in rank order along with the image evaluations of last year for comparison purposes.

Attribute Ratings for California

	2007	Index	2006	Difference
Scenery	3.8	106	3.8	0.0
Dining	3.6	109	3.6	0.0
Weather	3.6	107	3.6	0.0
Lodging	3.5	105	3.5	0.0
Off-hill activities	3.5	108	3.5	0.0
Après ski entertainment/nightlife	3.5	108	3.4	0.1
Variety of terrain	3.4	100	3.3	0.1
Challenge of terrain	3.4	101	3.3	0.1
Service	3.4	102	3.3	0.1
Ski/Board rentals	3.4	101	3.2	0.1
Parks & pipes	3.3	101	3.3	0.1
Access	3.3	102	3.2	0.1
Grooming	3.3	102	3.3	0.1
Family programs	3.3	104	3.2	0.1
On-mountain food	3.3	102	3.2	0.1
Snow quality	3.3	95	3.2	0.1
Lift Lines	3.1	96	3.1	0.0
Crowding on the mountain	3.0	93	2.9	0.0
Value	3.0	93	2.9	0.1

What is truly surprising about these rating is the remarkable similarity between last year's limited target market sample and this year's national evaluations. These scores are essentially identical on every measure. In other words, the image of California as a snow skiing destination is consistent throughout all markets. Of course, consistency is not necessarily strength. **Of these 19 attributes, only three were rated above 3.5 – scenery, dining and weather – which were the three leading attributes last year.** This was part of the rationale for identifying non-slope characteristics as potential differentiators.

Still, the fact remains that despite having a slightly above average perception on nearly all the measures, the snow skiing category is really strongly defined by the image of Colorado. The fact is Colorado dominates all the image assessments and is the yardstick against which all other competitors are compared. Furthermore, these results even state by state mirror those of last year's more geographically focused assessments.

Attribute Index for Competitive States

	CA	CO	ID	MT	NV	UT	NY	VT
Snow quality	95	**124**	97	102	97	110	83	92
Challenge of terrain	100	**123**	95	100	97	107	84	92
Variety of terrain	101	**123**	96	100	98	106	85	92
Grooming	101	**118**	95	98	99	106	90	93
Lift lines	96	**112**	99	104	100	105	88	96
Crowding on mountain	93	**107**	102	106	101	106	88	97
Value	93	**109**	101	102	101	**109**	89	97
Service	102	**114**	95	97	101	105	90	97
Weather	107	**119**	96	97	101	106	82	91
Access	104	**116**	92	92	101	108	94	94
On-mountain food	102	**113**	95	97	102	104	92	95
Lodging	105	**117**	93	95	102	102	91	94
Dining	109	**116**	92	93	101	101	95	93
Après ski entertainment & nightlife	108	**120**	90	92	108	95	96	92
Off-hill activities	108	**117**	92	93	106	100	93	92
Family programs	102	**114**	96	96	98	106	91	97
Scenery	106	**122**	94	100	98	102	84	96
Parks & pipes	102	**119**	94	97	99	106	88	96
Ski/Board rentals	101	**117**	95	97	101	104	90	95
Average	102	**117**	95	98	101	105	89	94

Surprisingly, the individual state-by-state assessments of strengths and weaknesses remain identical to those recorded last year.

- California's strongest attributes are dining and other off-hill activities.
- Colorado is rated strongly across the board, most notably for several outdoor attributes: snow quality, challenge of terrain, variety of terrain, scenery and weather.
- Idaho indexed below average for all attributes except value and crowding on the mountain.
- Montana was slightly more competitive than Idaho, indexing above average on value, lift lines and snow quality.
- Like Idaho and Montana, Nevada was considered a good value. Nevada also indexed higher than average on several entertainment factors: off-hill activities and après ski entertainment and nightlife.
- The ratings for New York were below average across the board.
- Overall, Utah's ratings were higher than California's, especially for snow quality, family programs, value, grooming, access and variety of terrain.
- Vermont, like New York, received below average ratings across the board.

The result of the strong imagery seen here is dominance by Colorado as a winter destination in the minds of US traveling skiers. However, while this may be the case, California remains a major player behind Utah and Vermont. By way of example, respondents were asked which states they considered good places to go for cold weather activities. A remarkable 92% mentioned Colorado. California was mentioned by nearly a third of those surveyed. Not surprisingly, given the inclusion of respondents from the northeast, Vermont's status has improved over last year.

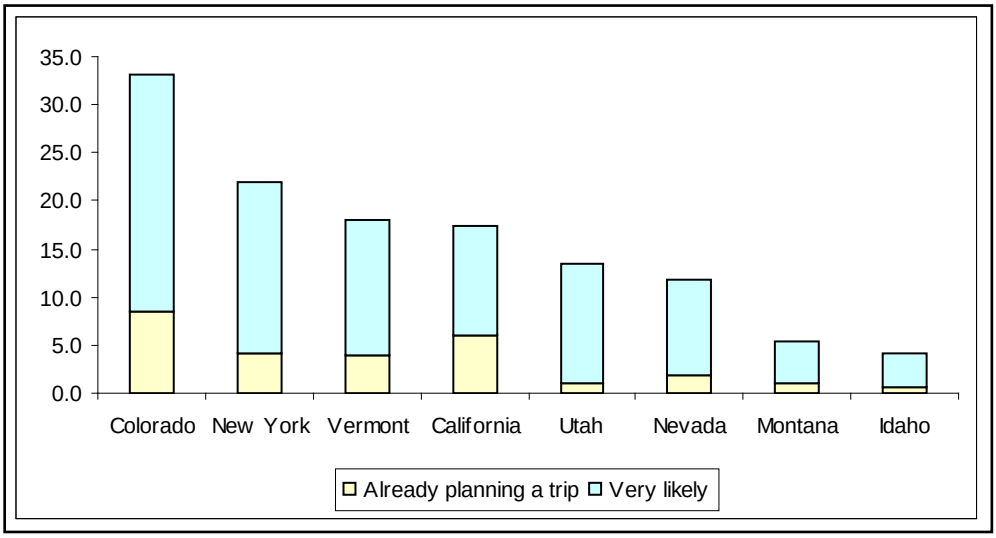
Good Places to Go for Cold Weather Activities
(states mentioned by at least 5%)

Colorado	92.3%
Utah	54.8%
Vermont	38.2%
California	30.6%
Wyoming	16.5%
Montana	16.5%
New Hampshire	11.6%
Idaho	11.0%
Nevada	10.6%
New Mexico	10.0%
Michigan	8.1%

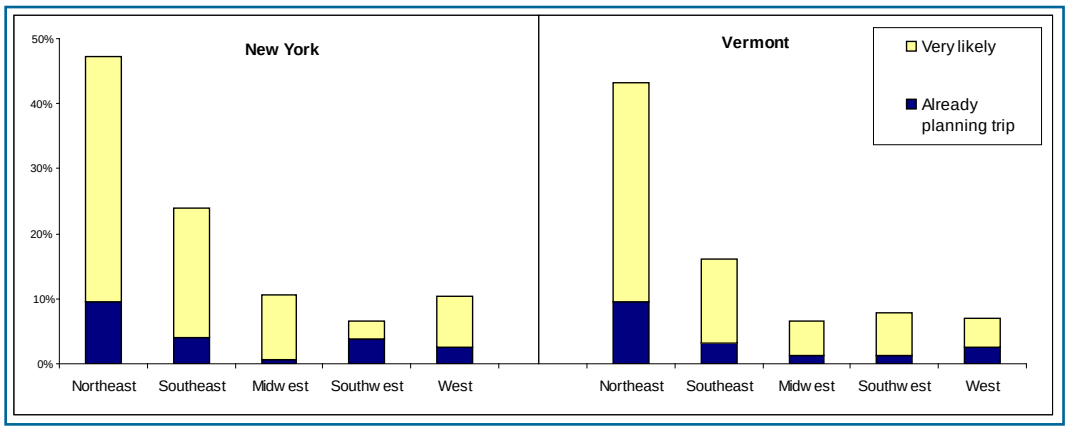
However, people's behavior does not always mirror their attitudes. The destinations that one might consider visiting for a certain type of trip are not necessarily the places they are likely to go. A good example is Hawaii; often a preferred destination but not one that is visited often, for a variety of practical reasons.

As such, behaviors are typically the focus of effectiveness studies. However, in this initial phase of research, attitudes are more at issue. Nonetheless, by assessing attitudes toward competitive winter states in different fashions, dramatically different results ensue. Perhaps the best behavior substitute which can be used is *reported likelihood* to visit different states for a cold weather vacation.

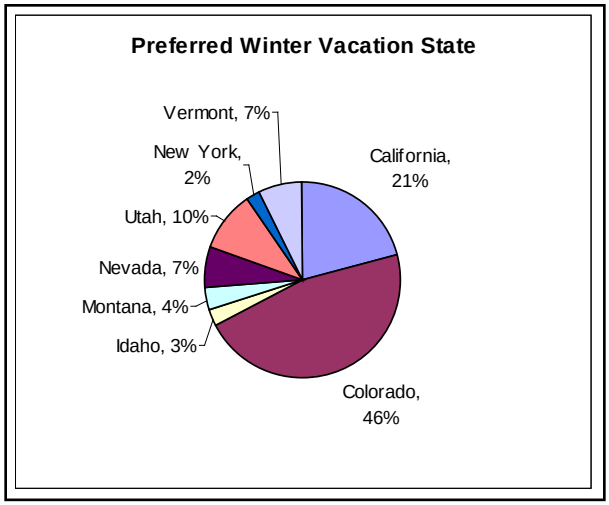
Likelihood to Visit States for Cold Weather Vacation within Next Year



Of interest and importance here, is the remarkably strong showing for New York and Vermont which, in terms of image, performed comparatively poorly. More than attractiveness and appeal play a role in the selection of a destination. Most likely things like proximity, convenience, time and cost play important roles in the selection process. The result is that the very good performances of Vermont and New York were certainly not a function of their image as ski destinations relative to the comparative ratings reviewed earlier. However, when these likelihood results are considered in light of the location of the respondents, the role of proximity becomes quite clear.



For both these markets, their strong national performance is the result of dominance in the northeast. These states are regional ski attractions – not world class ski magnets. They cannot compete on most of the attributes – but one cannot go to Colorado for the weekend nearly as easily. The amazing strength of Colorado as a ski destination is not based solely on its remarkably high ratings for every attribute, but rather the fact that its appeal does not have the geographical underpinnings of every other state. Below California and Colorado's geographical performance relative to likelihood to visit is illustrated. Here, Colorado does well in every region. Alternatively, California is clearly dominant in the west, thereby weakening the category leader in that region – just as the convenience of Vermont and New York make Colorado less strong there as well.



What we like/prefer is not necessarily what we do or get. Colorado is clearly preferred overall in the prior measures, and this state similarly dominates the alternative destinations identified. At the same time, we see that California is a strong second. This is a reflection of good image scores coupled, no doubt, with practical convenience.

However, the strength of geographic proximity has interestingly less to do with overall preference. In the chart below, while Colorado is strong across all regions (with the west being somewhat of an exception) California records similar appeal across these geographies. The question is, how can these preferences be strengthened?

Preference by Region

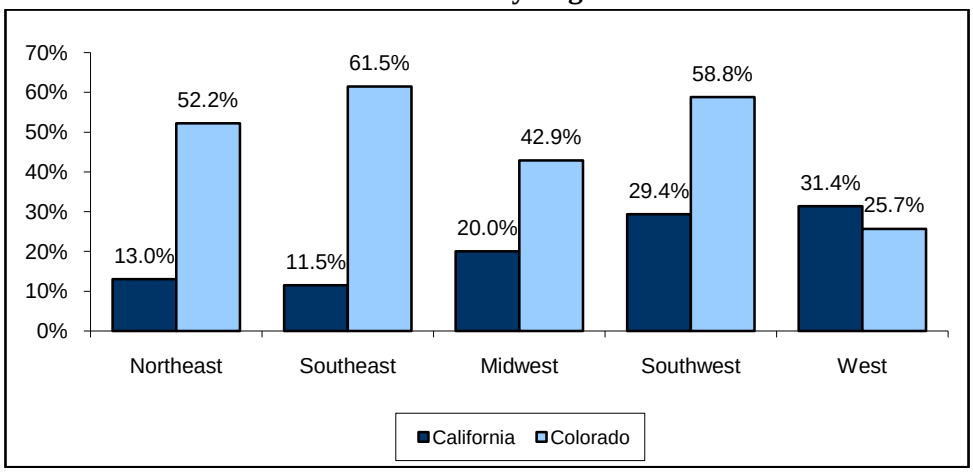
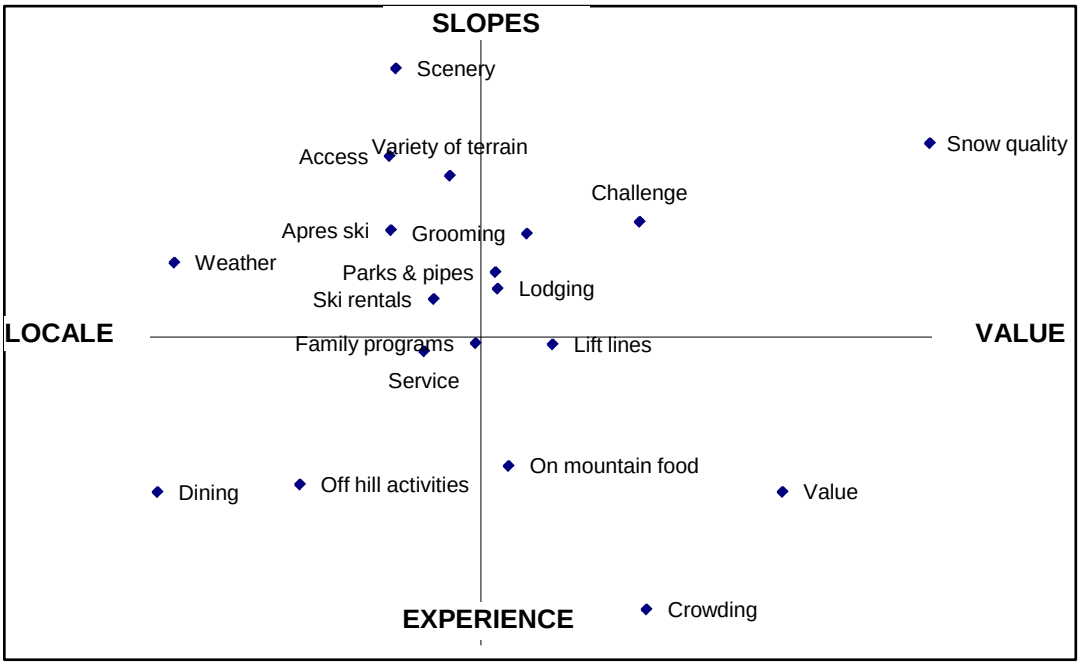


IMAGE ASSESSMENTS & POSITIONING

The initial findings indicate that California is not the leader relative to its image as a winter destination. Yet, relative to destination imagery, the challenge is making sense of the ratings and attributes and determining the best way to use this intelligence. Should California focus on its ski facilities and compete head to head with Colorado, or is there another option for differentiating the State? Relative to these crucial questions, it is helpful to gain insight into how the image ratings relate to destination selection. In last year's research, perceptual mapping was used to clarify the drivers of differentiation for the different states. The fact is that consumers' imagery of an area is not based on a list of attributes – their overall image of a destination employs a "short-hand" of sorts, which incorporates their ideas, thoughts and experiences about a place. In light of the objectives of this research and to facilitate comparing the results of this year's study to those of earlier studies, the same mapping tool and the same attribute space was used. The map employed last year is detailed below:

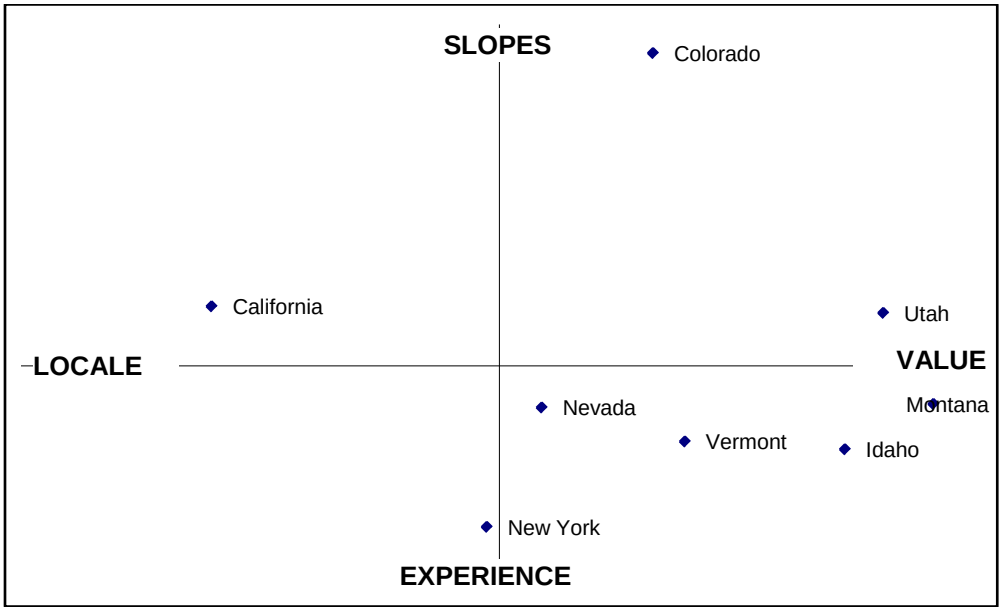
- The first (the vertical axis) can be considered *Slopes versus Experience*. On one hand, people evaluate a place based on the skiing (Slopes) – the terrain, the quality of snow, grooming, etc. However, this is balanced by the Experience – things like crowding and other amenities. These two can be a tradeoff, with some places offering more in terms of slopes, which can lead to crowding and other negative attributes. Moreover, some resorts offer more than just skiing.
- The second dimension (the horizontal axis) compares *Locale versus Value.* On the left side of the map items appear that relate to the overall locale – dining, après ski and off-hill activities. On the right side, the main issue seems to be Value. In this comparison, people look at the value they receive versus the opportunities and amenities that are available in a specific locale.



What is most interesting about this exercise is that when the imagery of the various states in this national sample are plotted in this perceptual space, the results are virtually identical to those of last year's winter research survey. Of course, insofar as the ratings of these states on the attribute measures were nearly the same as those reported last year, this should be no surprise.

- **Colorado** and **Utah** are positioned in the **Slopes/Value** quadrant.
- **California** is in the **Slopes/Locale** quadrant.
- The remaining states are positioned in the lower two quadrants, with **New York** in the **Locale/Experience** quadrant and **Nevada**, **Vermont**, **Idaho**, and **Montana** in the **Value/Experience** quadrant.

Current State Images



As noted last year, Colorado is the preferred ski travel destination and is clearly differentiated in this illustration of the competitive landscape. Interestingly, the three states with the strongest imagery are all in the top half of the map, and all three are clearly differentiated.

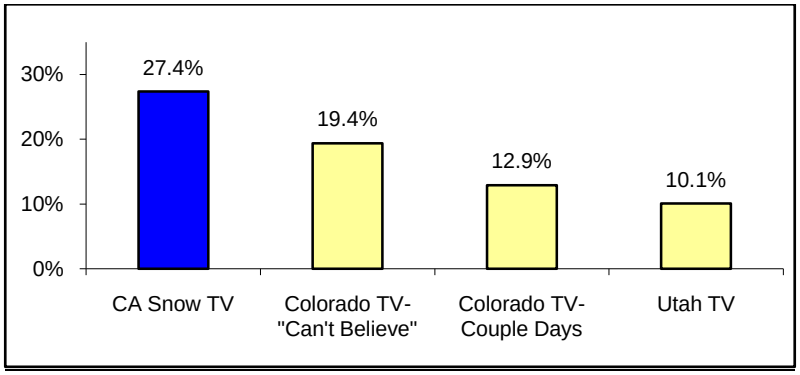
Of course, we have seen variances between travelers' imagery and their behavior, but California clearly has some strong differentiation opportunities. In last year's study, the results suggested that California needs to first distinguish itself from Colorado and Utah by focusing on its après ski and off-hill activities. This focus, however, should not abandon promotion of the State's slopes, since slopes are the main driver of cold weather travel. In short, to attract additional winter visitation, California will need to *promote* its slopes and skiing while *highlighting* its off-hill offerings. However, the TV campaign this year and last was slope and snow focused. In this context, it will be important to see how it affected image perceptions, if at all.

ADVERTISING AWARENESS

The foregoing provides an overview of the competitive situation and insight into how consumers view winter destinations. In this context, it is useful to assess this year's ad campaign and its impact. Successful advertising must achieve several primary goals. First, it must reach the target audience. In this study, "reach" is defined as the percentage of people that recalled the advertising. To measure recall, the respondents were asked to view TV ads for California, Colorado and Utah, and to indicate whether they recalled being exposed to them. In this study, consumers viewed one California TV ad as well as two Colorado TV ads, one Montana TV ad, and one Utah TV ad.

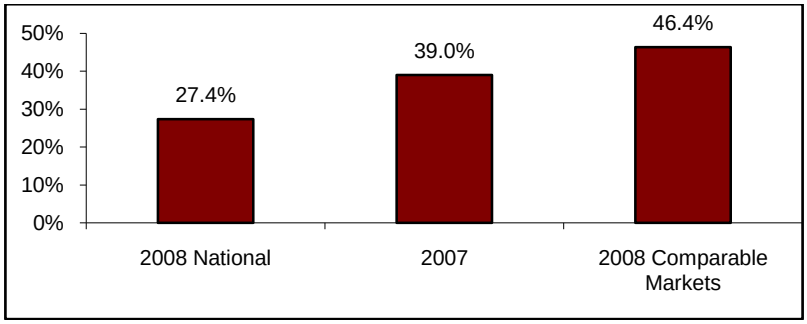
First, consider recall of the individual ads. As stated, California and Utah had one ad each, while Colorado had two. This year, these ads were tested among a nationwide ski traveler audience. Moreover, as has been the case with most of California's broadcast efforts, the Snow ad outperformed the competitors' efforts.

Recall of TV Ads



Perhaps of greater significance than the competitive share of voice is a comparison to last year's results given the sizable increase in media expenses. Of course, the increased media budget was used to expand the geographic scope of the Snow campaign, from four targeted markets to a national cable buy. Hence, comparisons to last year have to be made with care. Below, this year's awareness is compared to last year's, suggesting a decline. However, when only last year's four target markets are considered, the continuity of the campaign in fact generated a significant increase in recall.

Advertising Awareness



The impact of a campaign is often not accurately assessed merely by awareness or reach – frequency of exposure is also important. Predictably, as seen last year and further supported by the similarity of this year's Snow ad to last year, the California TV ad recorded a much higher reported frequency of exposure.

% Recall Multiple Exposures

CA Snow TV	74.9%
Colorado TV-"Can't Believe"	57.0%
Colorado TV-"Couple Days"	51.1%
Utah TV	46.0%

Ultimately, however, the measure of the impact of this advertising needs to be viewed in the context of the number of exposed households. While the overall awareness level is lower than that recorded last year in the four target markets, the national campaign dramatically increased the total number of households that were made aware of the State's advertising.

Aware Households

Total Households	105,480,101
% over $50,000	42.0%
Total target households	44,291,094
% interested in snow skiing	36.8%
Households interested in snow skiing	16,295,573
% Aware	27.4%
Households reached by advertising	**4,472,782**

Compared to last year's Snow campaign in four markets, which yielded just 1,469,000 households, this represents an enormous growth in campaign exposure. The impact, however, will need to be viewed in light of travel behavior and incremental visitation in which proximity will no doubt play a significant role. As we have seen, except for Colorado, regional origination, convenience and time are all important elements in the visitation equation. Hence, we may not expect the same type of exponential increase in visitation and incremental expenditures in the follow-up ROI wave.

CREATIVE EVALUATION

An effective marketing campaign includes two key elements – the media plan has to ensure that a sufficient number of people are exposed to the message and the advertising must deliver a meaningful and compelling message. The advertising has to differentiate the State and communicate its benefits as a winter travel destination. However, given the similarity of California's Snow spot this year to last, little change should be expected.

The research asked respondents to view television ads from California, Colorado and Utah. After reviewing each campaign, they rated the advertising in four categories on a 5-point scale, where the higher the number, the more they agreed with the Statement:

- Makes you more interested in visiting this state
- Shows experiences and places about which you are interested
- Shows a unique place with a diverse and desirable lifestyle
- Shows a good place for a winter vacation.

On this scale, a higher rating denotes stronger performance. SMARI has tested a large number of travel ads and, generally, the best ads receive ratings of "3.8" or higher. A score of "4.0" is very unusual, and most successful ads earn ratings from "3.5" to "3.8."

California's ads were rated rather highly in all areas, especially for *shows a good place for a winter vacation*. Colorado's ads, however, were rated even more highly on all attributes except *shows a unique vibe and desirable lifestyle*, which is the core positioning element for the State's travel overall.

Ratings of Campaigns

	CA	CO	UT
Made you more interested in visiting this state	3.6	3.7	3.6
Shows experiences & places you are interested in	3.7	3.9	3.6
Shows a unique vibe & desirable lifestyle	3.7	3.6	3.4
Shows a good place for a winter vacation	3.9	4.0	3.9

This performance is certainly good, although questions about competitive differentiation need to be explored. Interestingly, the California campaign focuses on skiing while the Colorado effort, which is already strongly positioned relative to the slopes, seems more oriented toward off-hill activities (spas, galleries, museums, and so forth). The forward-going challenge for California will be differentiating its winter appeal from that of the market leader. The core positioning of lifestyle and vibe are central to this effort. Exhibiting some of this off the mountain might help further strengthen the State's appeal.

INFLUENCE ON ATTITUDES

Unquestionably, one of the most important and consistent findings of this research is the consistency found in the image of California as a winter travel destination. The fact that the findings vary little between this year and last is at first surprising given the vastly different sampling parameters of a national audience versus the prior focus on a few markets. This difference and identical ratings may be reflective of the audience of winter ski travelers. This group may have reasonably strong familiarity and attitudes which are going to be difficult to change. Going forward, further exploration into past behavior and experiences of this segment might provide a helpful analytical element to explain this remarkable consistency.

The fact that image perceptions are surprisingly resistant to change is illustrated rather clearly in this table which shows the difference in attitudes toward California as a winter destination as a function of ad awareness. The clear result is that the attitudinal impact of this campaign seems rather limited. At least in this incarnation, the advertising is not poised to change attitudes – rather, it merely reinforces awareness of the availability of the State as a snow competitor. It is a reminder – to maintain California in the competitive set as opposed to impact attitudes.

Not only did these attitudinal ratings not change in any significant fashion, as seen earlier in the consistency of the perceptual map, there were no differences in perceptions of the State between those with awareness and those without.

Attribute Ratings - by Awareness

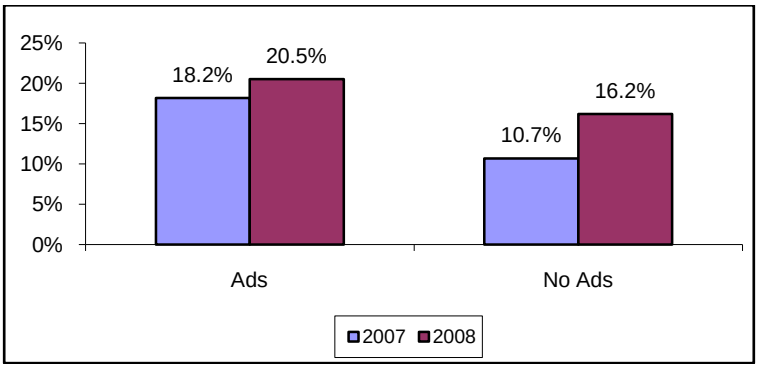
	Ads	No Ads	Diff.
Snow Quality	3.2	3.3	0.1
Challenge of Terrain	3.4	3.4	0.0
Variety of Terrain	3.4	3.4	0.0
Grooming	3.4	3.3	0.0
Lift Lines	3.1	3.2	0.1
Crowding on Mountain	2.9	3.0	0.1
Value	2.9	3.0	0.1
Service	3.3	3.5	0.1
Weather	3.6	3.7	0.1
Access	3.3	3.4	0.1
On-mountain Food	3.2	3.4	0.1
Lodging	3.5	3.6	0.0
Dining	3.6	3.7	0.1
Après Ski Entertain-ment & Nightlife	3.5	3.5	0.1
Off-hill Activities	3.5	3.6	0.1
Family Programs	3.3	3.4	0.0
Scenery	3.8	3.8	0.0
Parks and Pipes	3.3	3.4	0.1
Ski/Board Rentals	3.3	3.4	0.1

Recognizing this, strategic issues need to be addressed regarding the role and communication objective of the campaign. We need to evaluate in the ROI wave if the advertising presence keeps the State in the competitive set and thereby yields incremental visitation. If so, the current campaign with limited image shifting impact is an effective approach. However, if it is determined that some shift in image could be beneficial, a shift in creative execution beyond Snow alone may be required.

If this advertising works in part merely by keeping a well known product in front of potential travelers, the result should be strong likelihood to visit as a function of awareness. While the ultimate goal of the advertising is to boost visitation, in this first wave, an initial indication of success can be seen in the measures of intent to visit, likelihood to visit, and other planning behavior.

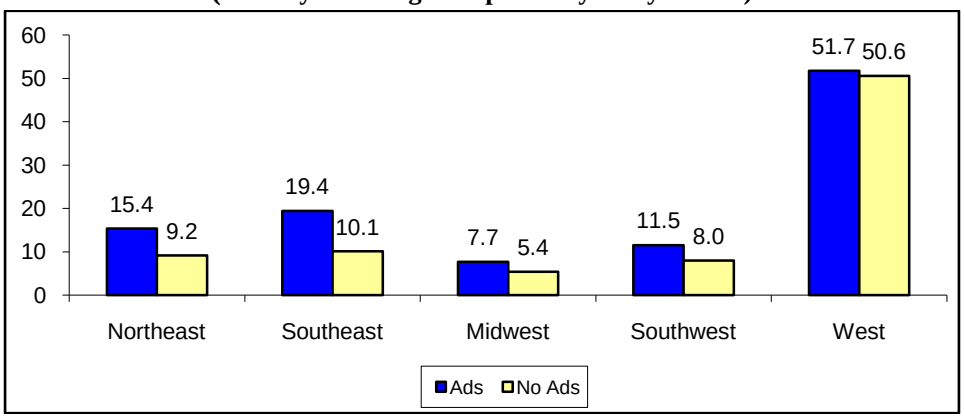
From the standpoint of an assessment of likelihood to take a winter trip to California in the next year, the results, as last year, are quite positive. The fact that intentions are higher despite a broader sample of markets is in itself a positive indicator. More importantly with respect to the effect of the advertising, those seeing the TV commercial are significantly more likely to visit. Furthermore, while the gap between the aware and unaware is smaller this year, this is ameliorated by the fact that the sample geography is so broad and the impact should be anticipated to be weaker.

Likelihood to Visit California - by Ad Awareness
(Already Planning a Trip & Very Likely to Visit)



Importantly, while the national media buy could be expected to dilute the overall impact of interest in the State as a function of distance, the fact is that from a regional perspective the impact on likelihood was not as great in the already strong west. This is a positive and important finding. While traveling skiers may already have a fairly clear image of California as a winter leisure destination, the advertising appears to have an impact on generating interest most strongly in the east where consideration of the State as an option is probably most likely forgotten. It will be interesting to see if this stronger intention in the less productive eastern markets is realized in terms of larger incremental travel from these regions as well.

Likelihood to Visit California - by Ad Awareness & Region
(Already Planning a Trip & Very likely to visit)



A similar measure of impact in terms of making certain the State is included in the consideration set is top of mind recall of the State as a winter destination. This is one of the first questions asked in the survey. What is surprising here is that of the three market leaders and advertisers tested only the advertising for California seems to inspire a greater extent of consideration. This is partly a function of lower, initial top of mind consideration as a winter destination. As such, there is more room to grow. Minimally, however, from a tactical perspective, the advertising seems to be moving California into travelers' consideration set when it might otherwise not be.

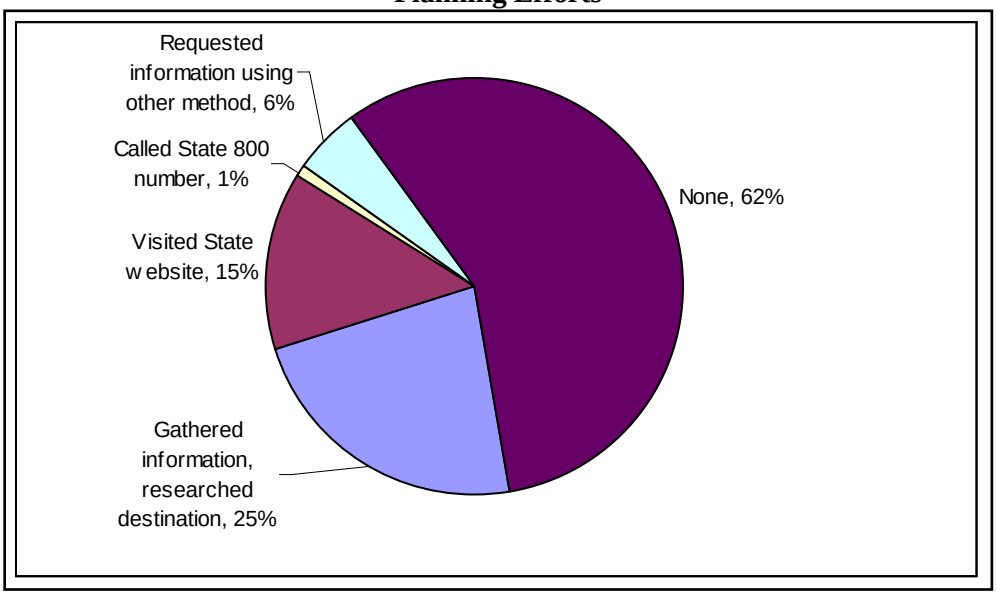
Top of Mind Awareness of States to Ski & Snowboard - by Awareness

	Ads	No Ads	Diff
Colorado	88.3%	92.1%	-3.8%
Utah	50.8%	55.0%	-4.2%
California	32.8%	29.7%	3.1%

While the ultimate success of this campaign will be measured in incremental visitation, some of the first steps in this process involve some planning elements. As such, the level of planning to each of the states whose image was explored was investigated. Not surprisingly, planning timeframes were longer when there was preference, interest and likelihood to visit. As such, the relative level of types of planning activities proved to be less interesting than the distribution of activities and, again, the influence of advertising exposure.

Interestingly, of those who were proactively planning and gathering information, one-third reported specifically visiting the State's Website. Moreover, in keeping with what has happened in the travel industry over the last 10 years, only 2% called an "800" number.

Planning Efforts



Again, however, the role of the advertising is the ultimate focus of this research. Here, we see the initial effectiveness of the campaign again driving potential travelers to the State's Website. Furthermore, about 10% more of those who saw the advertising gathered information about California as a winter destination. While the campaign may not be changing image perceptions, the dominant finding is that the advertising is improving the likelihood that the State will be considered by skiing travelers.

Impact of California Snow Advertising - by Awareness

	Ads	No Ads	Diff.
Gathered information, researched destination	25.7%	24.1%	1.6%
Visited State Website	20.5%	12.8%	7.6%
Called State 800 number	1.8%	0.7%	1.1%
Requested information using other method	7.0%	5.1%	1.9%
None	64.8%	53.8%	-11.0%

CONCLUSIONS & RECOMMENDATIONS

- This first research wave is part of a more extensive effort to assess the effectiveness of the CTTC's Winter Campaign. This year, while basically the same creative was used, the advertising launch went from four target markets to a national cable buy. The focus of this first phase of research is directed toward awareness, image and intentions. The subsequent ROI wave will assess the incremental visitation resultant of exposure to the advertising.

- From an image perspective, the findings reveal that the perceptions of the country's traveling ski population are fairly strongly ingrained. These results closely mimic those of the prior year's limited, four-market study. Similarly, consumers' image perceptions were comparable regardless of regional orientation. This could be because this market segment is comprised of regular travelers who have a great deal of knowledge about the available alternatives. In the next research phase, past travel experience should be incorporated so that this possibility can be evaluated.

- From an awareness perspective, the advertising fared well, yielding strong recall over the competitors tested and reaching a broad national audience. While awareness was weaker than last year, when just the four comparable markets are considered, it was actually stronger – potentially the result of the continuity of the campaign.

- While the creative was well evaluated, it did not affect the image of the State among those who had seen the advertising. This could be due to the ingrained image of California as a winter destination. At the same time, the advertising focused only upon the slopes without much positioning regarding off mountain activities. Colorado, the undisputed market leader, interestingly focuses upon these other offerings. The ways by which California can further exhibit its vibe and lifestyle beyond the snow might be pursued.

- If, however, the market is well attuned to the competitive offerings, then it could be that the primary function of the advertising is to stay in its consciousness and be included in the competitive set. All measures in this regard suggest that the advertising effectively achieved this objective.

- In the ROI effort, it will be important to explore past behavior related to and familiarity with the competitive offerings to provide a context for evaluating a market presence tactic or a positioning approach for future marketing endeavors. Nonetheless, in terms of awareness building and intention shaping, this initial wave suggests that the national campaign should prove quite successful.

APPENDIX

2006 Advertising Effectiveness internet Survey
Snow Campaign Market

California Tourism
Final – Dec 19, 2006

Thank you for visiting our travel survey. Your opinions are valuable to us! This survey is about travel and vacation choices. This is for research purposes only and is an opportunity for you to give feedback to travel destinations so that they can improve. No sales effort will ever result from your participation.

Before you begin, there are a few things to note about the survey:

- For most questions, simply click on the button of your response and then click on the Next button to go on to the next question.
- If you need to go back to the preceding question to change your response, click on the Previous button.
- For some questions, you will need to scroll down to respond to all the questions on a screen.
- To stop at any point, close the browser window. The survey will terminate and you will not be able to re-enter.

S1. First, who in your household is primarily responsible for making decisions concerning travel destinations?

1 ..... SELF
2 ..... SELF & OTHER
3 ..... SPOUSE/OTHER→ TERMINATE

S2. Do you normally take at least one vacation or leisure trip a year? A leisure trip would be any non-business trip involving at least one night stay at a location at least 50 miles from your home?

1 ..... Yes
2 ..... No → TERMINATE

S3. Which of the following categories best represents the total annual income for your household before taxes?

☐ Less than $50,000 →TERMINATE
☐ $50,000 but less than $75,000
☐ $75,000 but less than $100,000
☐ $100,000 or more

1. Thinking about places to go for cold weather activities, such as skiing and snow boarding, what STATES come to mind as good places to go? (USE DROP DOWN LISTS)

STATE #1 _____
STATE #2_____
STATE #3_____
STATE #4_____

2. How likely are you to visit each of the states below for a cold weather vacation in the next year?

	Not at all likely	**Not very likely**	**Somewhat likely**	**Very likely**	**Already planning a trip**
California	1	2	3	4	5
Colorado	1	2	3	4	5
Idaho	1	2	3	4	5
Montana	1	2	3	4	5
Nevada	1	2	3	4	5
Utah	1	2	3	4	5
New York	1	2	3	4	5
Vermont	1	2	3	4	5

ASK Q3 IF CALIFORNIA IS AMONG THE HIGHEST RATED STATES AT Q2. THAT IS, NO STATE IS RATED HIGHER THAN CA AND AT LEAST ONE OTHER STATE IS RATED EQUAL TO CA. (IF OTHER STATES ARE HIGHER THAN CA, OR IF CA IS HIGHER THAN ALL OTHER STATES, SKIP TO Q4).

FOR CALIFORNIA AND OTHER STATES OF EQUAL LIKELIHOOD AT Q2.

3. Which of the following states would you prefer to visit within the next year? (Please select only one.)
   LIST STATES PER INSTRUCTION

4. In the course of planning for any upcoming trips, have you gathered information, gone to the website, or contacted any of the following states regarding information for planning a trip?

   Please mark all that apply.

	Gathered information, researched destination	**Visited State Website**	**Called State 800 number**	**Requested information using other method**	**None**
California	☐	☐	☐	☐	☐
Colorado	☐	☐	☐	☐	☐
Idaho	☐	☐	☐	☐	☐
Montana	☐	☐	☐	☐	☐
Nevada	☐	☐	☐	☐	☐
Utah	☐	☐	☐	☐	☐
New York	☐	☐	☐	☐	☐
Vermont	☐	☐	☐	☐	☐

FOR Q5 CALIFORNIA SHOULD BE ASKED OF ALL;
AS WELL, ROTATE TWO ADDITIONAL STATES WITH EQUAL LIKLIHOOD, IF POSSIBLE, OR ONE RATING PLUS OR MINUS:

5. Please answer some questions regarding [INSERT STATE] and what it provides as a ski/snow boarding destination. How would you rate [INSERT STATE] for..

	Poor				**Excellent**
Snow quality	1	2	3	4	5
Challenge of Terrain	1	2	3	4	5
Variety of Terrain	1	2	3	4	5
Grooming	1	2	3	4	5
Lift Lines	1	2	3	4	5
Crowding on Mountain	1	2	3	4	5
Value	1	2	3	4	5
Service	1	2	3	4	5
Weather	1	2	3	4	5
Access	1	2	3	4	5
On-mountain food	1	2	3	4	5
Lodging	1	2	3	4	5
Dining	1	2	3	4	5
Après Ski Entertainment & Nightlife	1	2	3	4	5
Off-Hill Activities	1	2	3	4	5
Family Programs	1	2	3	4	5
Scenery	1	2	3	4	5
Parks and Pipes	1	2	3	4	5
Ski/Board Rentals	1	2	3	4	5

INTRO TO TV ADS:

Now you will view an ad which will involve streaming video. You must have Microsoft Media Player installed to watch the ad.

If you have broadband Internet access, such as a cable modem, DSL, or a fast connection at work, please click the Broadband buttons to view the ads. If you have a dialup modem or you're not sure, use the Dialup buttons.

Please click Dialup or Broadband to view the ad then answer the question.

ASK QUESTIONS 6, 7 & 10 FOR EACH STATE, ROTATE ORDER OF STATES SHOWN

California
Colorado
Montana
Utah

California
mms://sms7.omniproductions.net/UT06W_CATV1-1.wmv
mms://sms7.omniproductions.net/UT06W_CATV1-1a.wmv

Colorado
mms://sms7.omniproductions.net/UT06W_COTV1.wmv
mms://sms7.omniproductions.net/UT06W_COTV1a.wmv
mms://sms7.omniproductions.net/UT06W_COTV2.wmv
mms://sms7.omniproductions.net/UT06W_COTV2a.wmv

Montana
mms://sms7.omniproductions.net/UT06W_MTTV1-1.wmv
mms://sms7.omniproductions.net/UT06W_MTTV1-1a.wmv

Utah
Winter Snow
mms://sms7.omniproductions.net/UT06W_UTTV1-1.wmv
mms://sms7.omniproductions.net/UT06W_UTTV1-1a.wmv

6. Do you recall seeing the following television ad?
    1. Yes
    2. No (THANK AND SKIP TO Q8)
    3. Could not view the ad (THANK AND SKIP TO Q8)

7. How many times have you seen it?
    1. Once
    2. Two or three times
    3. More than three times

FOR CALIFORNIA ONLY
8. Do you recall seeing this internet ad?
    1. Yes
    2. No

i. Did you visit this website – visitcaliforniasnow.com? (INSERT PICTURE OF WEBSITE)
I:\Team David\Ads - Master\California\1019106\ home page.png
    1. Yes
    2. No

FOR CALIFORNIA & COLORADO ASK
j. Now please indicate how much you agree that these ads…

	Strongly Disagree				**Strongly Agree**
made you more interested in visiting this state	1	2	3	4	5
show experiences and places that you are interested in	1	2	3	4	5
show a unique vibe and desirable lifestyle	1	2	3	4	5
show a good place for a winter vacation	1	2	3	4	5

FOR MONTANA & UTAH ASK
10a. Now please indicate how much you agree that this ad…

Ad…	**Strongly Disagree**				**Strongly Agree**
made you more interested in visiting this state	1	2	3	4	5
shows experiences & places you are interested in	1	2	3	4	5
shows a unique vibe and desirable lifestyle	1	2	3	4	5
shows a good place for a winter vacation	1	2	3	4	5

The following questions are for classification purposes only, and will help us understand different groups of people.

k. What is your marital status? Are you...?
   a. Married
   b. Divorced/Separated
   c. Widowed
   d. Single/Never married

l. Including yourself, how many people are currently living in your household? _____

m. How many living in your household are children under the age of 18? _____

n. Which of the following categories best represents the last grade of school you completed?
   a. High school or less
   b. Some College/Technical school
   c. College graduate
   d. Post graduate degree

o. Which of the following best describes your ethnic heritage? Are you...
   a. African American
   b. Asian-American
   c. Caucasian
   d. Hispanic/Latin American
   e. Mixed ethnicity
   f. Native American
   g. Other

p. What is your age?
   a. 18-24
   b. 25-35
   c. 36-45
   d. 46-54
   e. 55 or older

q. Are you...
   a. MALE
   b. FEMALE

THANK YOU FOR PARTICIPATING IN THIS SURVEY.