

ABC Visitor's Bureau

Tourism Power Survey

Campbell Rinker

Background

- ABC Visitor's Bureau contacted Campbell Rinker to conduct this survey.
- This survey studies the general population, visitor and non-visitors. The survey contained two sections: One for past visitors to the area and the other for travelers who had never visited the area.
- The survey was conducted using an online research panel.
- Three hundred surveys were conducted for this study - providing a margin of error of only $\pm 5.8\%$.

General Results Section

Frequency of Travel

- The highest proportion of respondents travel 3-4 times each year.

| Frequency of Travel | Overall | Visitor | Non-visitor |
|------------------------|---------|---------|-------------|
| <i>n</i> | 555 | 555 | 555 |
| Never | 55% | 5% | 55% |
| Every 2 years or less | 55% | 55% | 55% |
| 1-2 times a year | 55% | 55% | 55% |
| 3-4 times a year | 55% | 55% | 55% |
| 5-6 times a year | 5% | 55% | 5% |
| 7 or more times a year | 5% | 55% | 5% |

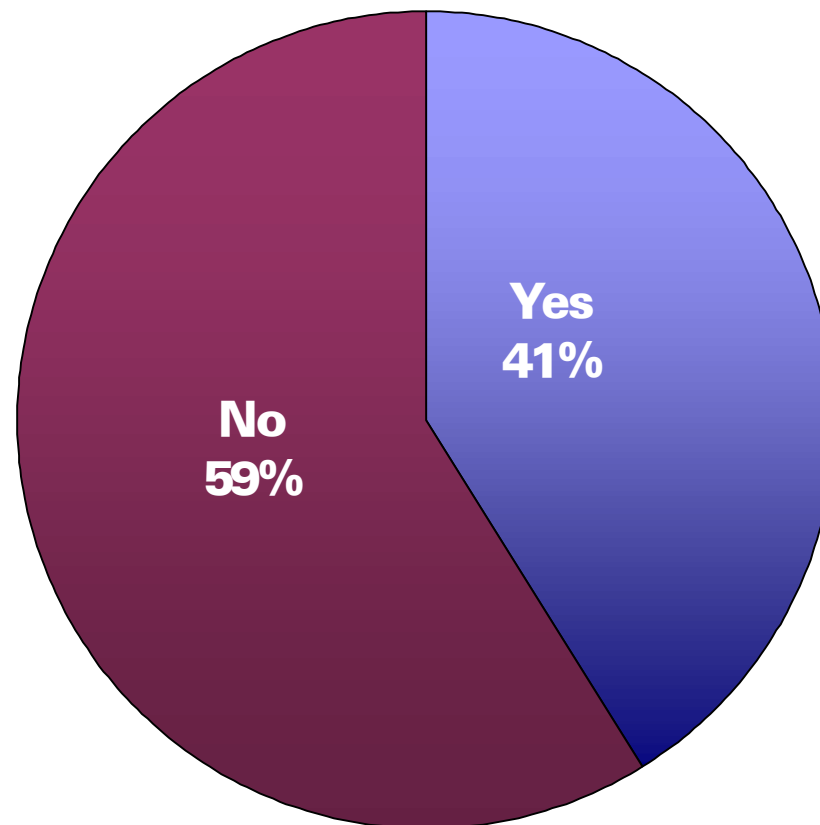
Desire to Travel

- Of those respondents who say they never travel, over half say they have no interest in traveling in the future. These respondents were terminated from the survey.

| Desire to Travel | Overall |
|---|----------------|
| <i>n</i> | 55 |
| I have no interest in traveling in the future | 55% |
| I don't travel now, but I may in the future | 55% |

Heard of the Area

- A majority of respondents have not heard of your area.

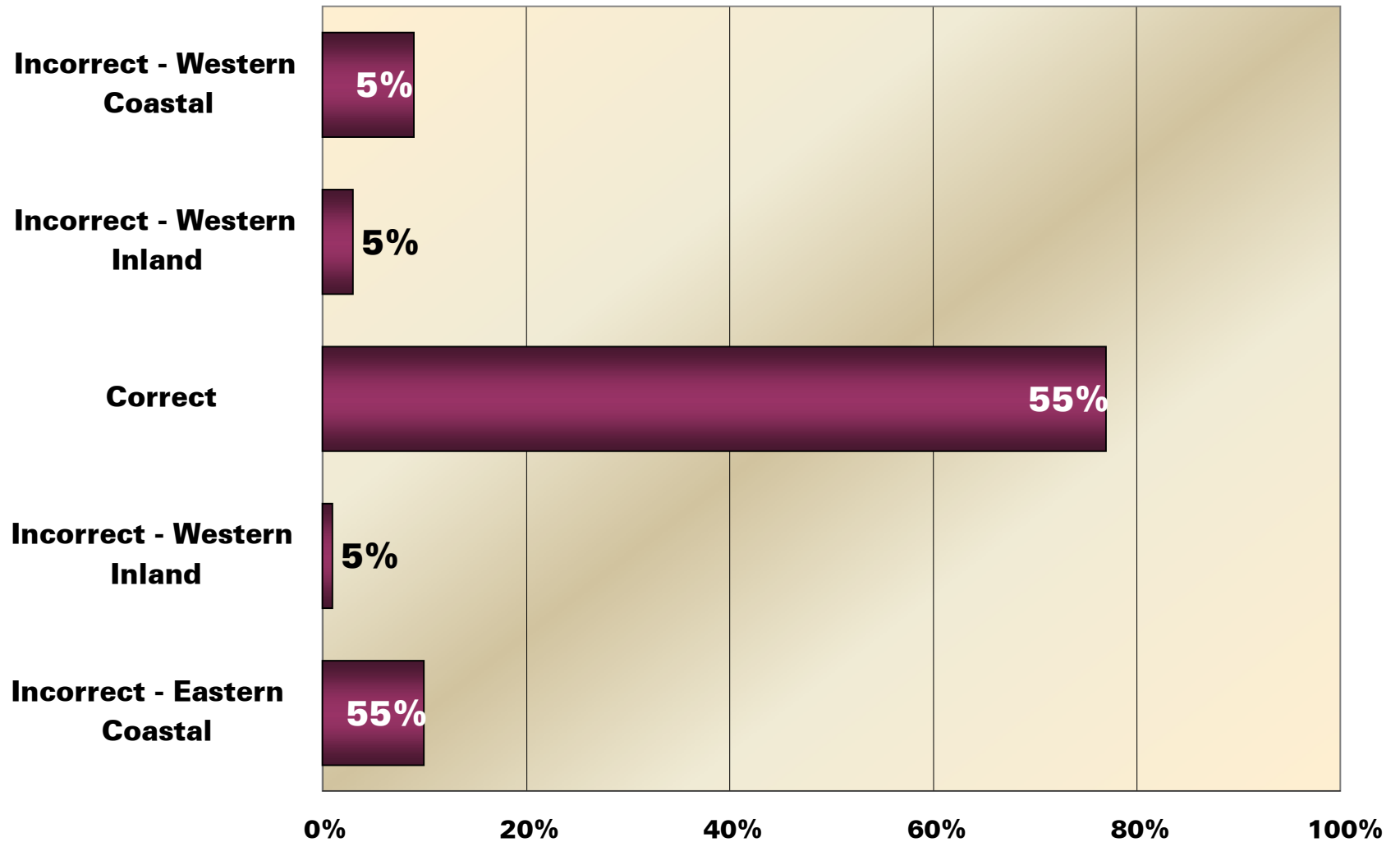


Location Recognition

- Your area enjoys roughly the same level of recognition as cities A and Z, and higher recognition than other well-known local destinations.

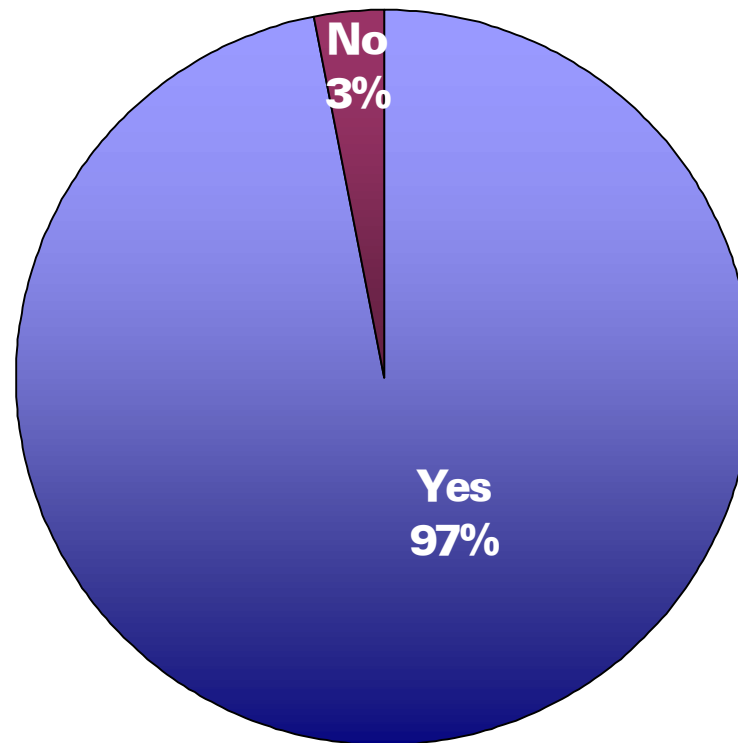
| Which of the following locations have you heard of? | Overall |
|---|---------|
| <i>n</i> | 300 |
| City A | 55% |
| City B | 55% |
| City C | 55% |
| City D | 55% |
| City E | 55% |
| City F | 55% |
| ABC National Forest | 55% |
| ABC Beach | 55% |

Ability to Locate your Area



Visited your Area

- A vast majority of respondents have visited your area.



Local Locations Visited

- Though your area has the same level of recognition as sister locals, such as City A and ABC National Forest, travelers are nearly five times as likely to have visited those other locations.

| Which of the following California locations have you visited? | Overall |
|---|---------|
| <i>n</i> | 300 |
| City A | 55% |
| City B | 55% |
| City C | 55% |
| City D | 55% |
| City E | 55% |
| City F | 55% |
| ABC National Forest | 55% |
| ABC Beach | 55% |

Locations Visited as Primary Destinations

| Locations Visited as Primary Destinations | Overall | Visitor | Non-Visitor |
|---|---------|---------|-------------|
| <i>n</i> | 300 | 150 | 150 |
| City A | 55% | 55% | 55% |
| City B | 55% | 55% | 55% |
| City C | 55% | 55% | 55% |
| City D | 55% | 55% | 55% |
| City E | 55% | 55% | 55% |
| City F | 55% | 55% | 55% |
| City G | 55% | 55% | 55% |
| ABC Beach | 55% | 55% | 55% |
| City H | 55% | 55% | 55% |
| City I | 55% | 55% | 55% |
| City J | 55% | 55% | 55% |
| City K | 55% | 55% | 55% |
| ABC National Forest | 55% | 55% | 55% |
| City L | 55% | 55% | 55% |
| City M | 55% | 55% | 55% |
| Don't Know/No answer | 5% | 5% | 5% |

Gender

- Survey respondents were more likely to be male than female. However, females were more likely to have visited your area than not.

| Gender | Overall | Visitor | Non-Visitor |
|----------|---------|---------|-------------|
| <i>n</i> | 300 | 150 | 150 |
| Female | 55% | 55% | 55% |
| Male | 55% | 55% | 55% |

Education

- Visitors to your area tend to be well educated, with 55% having earned at least a 4-year degree.

| Education | Overall | Visitor | Non-Visitor |
|-------------------------|---------|---------|-------------|
| <i>n</i> | 300 | 150 | 150 |
| High school or less | 55% | 5% | 55% |
| Vocational school | 5% | 5% | 5% |
| Some college | 55% | 55% | 55% |
| Completed 4 year degree | 55% | 55% | 55% |
| Graduate school | 55% | 55% | 55% |

Age

- Visitors to your area tend to be as old if not older than the typical leisure traveler.

| Age | Overall | Visitor | Non-Visitor |
|----------|---------|---------|-------------|
| <i>n</i> | 300 | 150 | 150 |
| Under 25 | 55% | 5% | 55% |
| 25 to 34 | 55% | 55% | 55% |
| 35 to 44 | 55% | 55% | 55% |
| 45 to 54 | 55% | 55% | 55% |
| 55 Plus | 55% | 55% | 55% |

Ethnic Background

- A majority of visitors to your area are Caucasian.

| Ethnic Background | Overall | Visitor | Non-Visitor |
|------------------------|---------|---------|-------------|
| <i>n</i> | 300 | 150 | 150 |
| White/Caucasian | 55% | 55% | 55% |
| Native American | 5% | 5% | 5% |
| Hispanic/Latino | 5% | 5% | 5% |
| Black/African-American | 5% | 5% | 5% |
| Asian | 5% | 5% | 5% |
| Other | 5% | 5% | 5% |

Marital Status

- A majority of visitors to your area are married, though a large proportion of widows also visit.

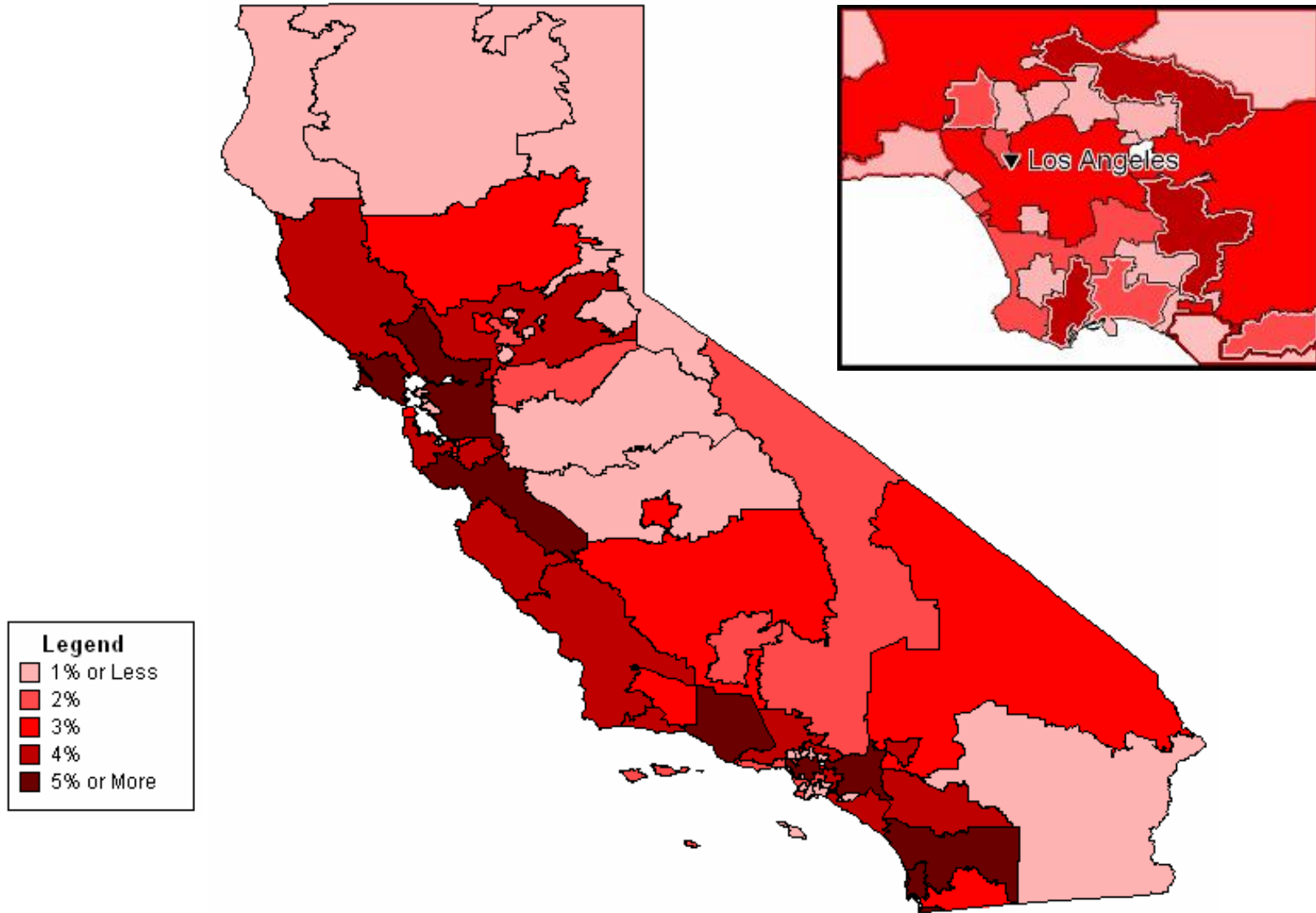
| Marital Status | Overall Visitor Non-Visitor | | |
|-----------------------|------------------------------------|-----|-----|
| <i>n</i> | 300 | 150 | 150 |
| Married | 55% | 55% | 55% |
| Never been married | 55% | 55% | 55% |
| Domestic partnership | 5% | 5% | 5% |
| Divorced/Separated | 55% | 55% | 55% |
| Widowed | 5% | 5% | 5% |
| Other | 5% | 5% | 5% |

Annual Household Income

- Visitors to your area tend to have above-average incomes.

| Annual Household Income | Overall | Visitor | Non-Visitor |
|----------------------------------|---------|---------|-------------|
| <i>n</i> | 300 | 150 | 150 |
| Under \$25,000 | 55% | 55% | 55% |
| \$25,000 to less than \$50,000 | 55% | 55% | 55% |
| \$50,000 to less than \$75,000 | 55% | 55% | 55% |
| \$75,000 to less than \$100,000 | 55% | 55% | 55% |
| \$100,000 to less than \$150,000 | 55% | 55% | 55% |
| \$150,000 or more | 5% | 5% | 5% |

Location



Amount Spent Yearly on Travel

| Approximate Amount Spent Yearly on Travel | Overall | Visitor | Non-Visitor |
|---|---------|---------|-------------|
| <i>n</i> | 300 | 150 | 150 |
| \$0 | 5% | 5% | 5% |
| Under \$500 | 55% | 55% | 55% |
| \$500 to \$999 | 55% | 55% | 55% |
| \$1000 to \$1499 | 55% | 55% | 55% |
| \$1500 to \$2999 | 55% | 55% | 55% |
| \$3000 to \$4999 | 55% | 55% | 55% |
| \$5000 Plus | 55% | 55% | 55% |
| Don't Know/No Answer | 5% | 5% | 5% |

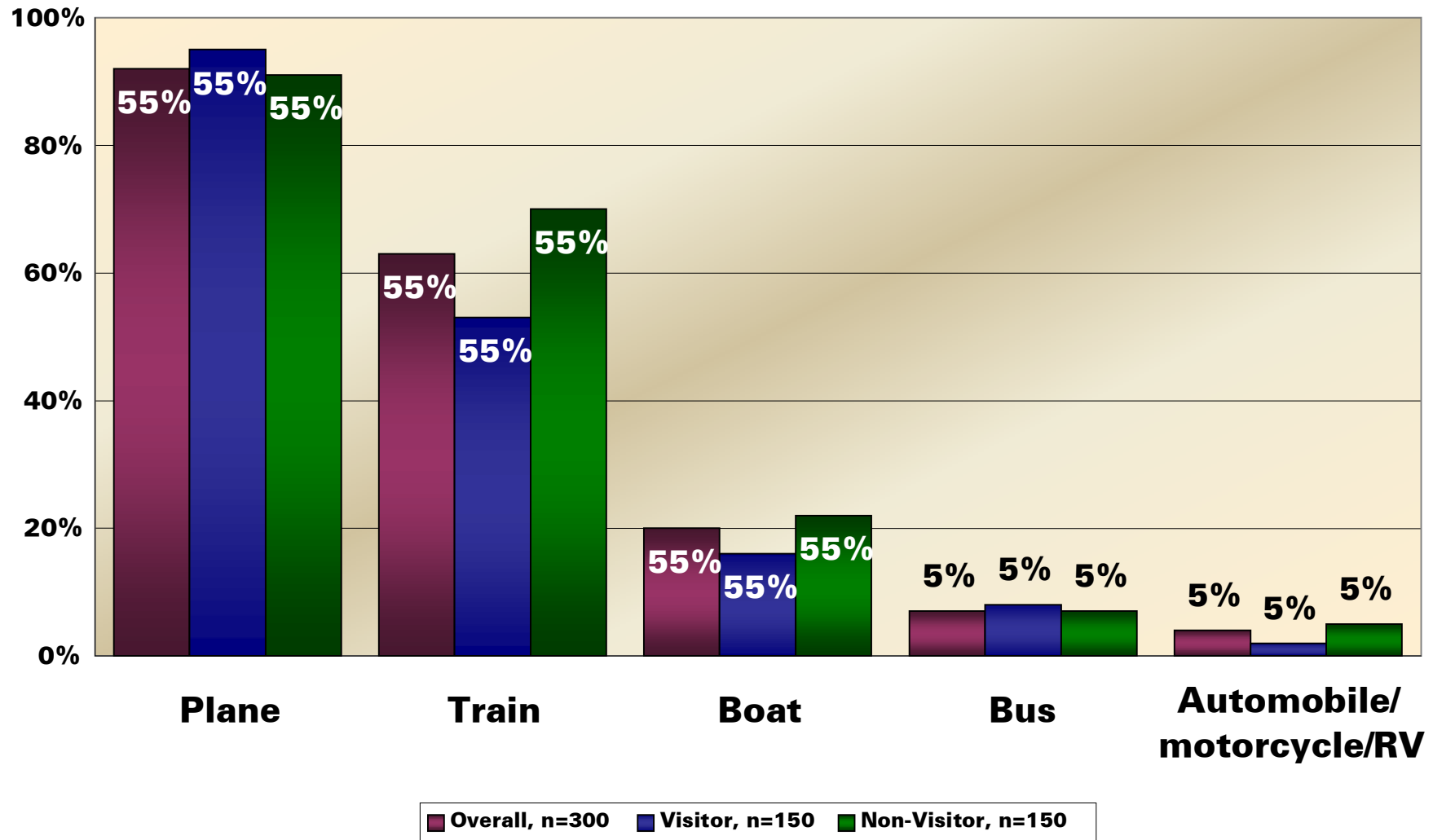
| | Visited Area | | Gender | | Age | | Income | |
|--------------|--------------|-------|---------|---------|----------|---------|-------------|---------------|
| | Yes | No | Female | Male | Under 45 | 45+ | Under \$50k | \$50k or More |
| Amount Spent | \$5,555 | \$555 | \$5,555 | \$5,555 | \$5,555 | \$5,555 | \$555 | \$5,555 |

Length of Trip

- The average trip length for a California traveler is 5 days. People that visit your area take longer trips overall (5.5 vs. 5). Men typically take trips that are 0.5 days longer than women. Unmarried people also take longer trips (5 vs. 5.5).

| Average Length of Trip for Business or Leisure | Overall | Visitor | Non-Visitor |
|--|---------|---------|-------------|
| <i>n</i> | 300 | 150 | 150 |
| Less than a day | 5% | 5% | 5% |
| 1-3 days | 55% | 55% | 55% |
| 4-5 days | 55% | 55% | 55% |
| 6-7 days | 55% | 55% | 55% |
| 8 + days | 55% | 55% | 55% |
| Don't Know/No answer | 5% | 5% | 5% |

Preferred Mode of Transportation for Travel



Quantity Traveling by Age Group

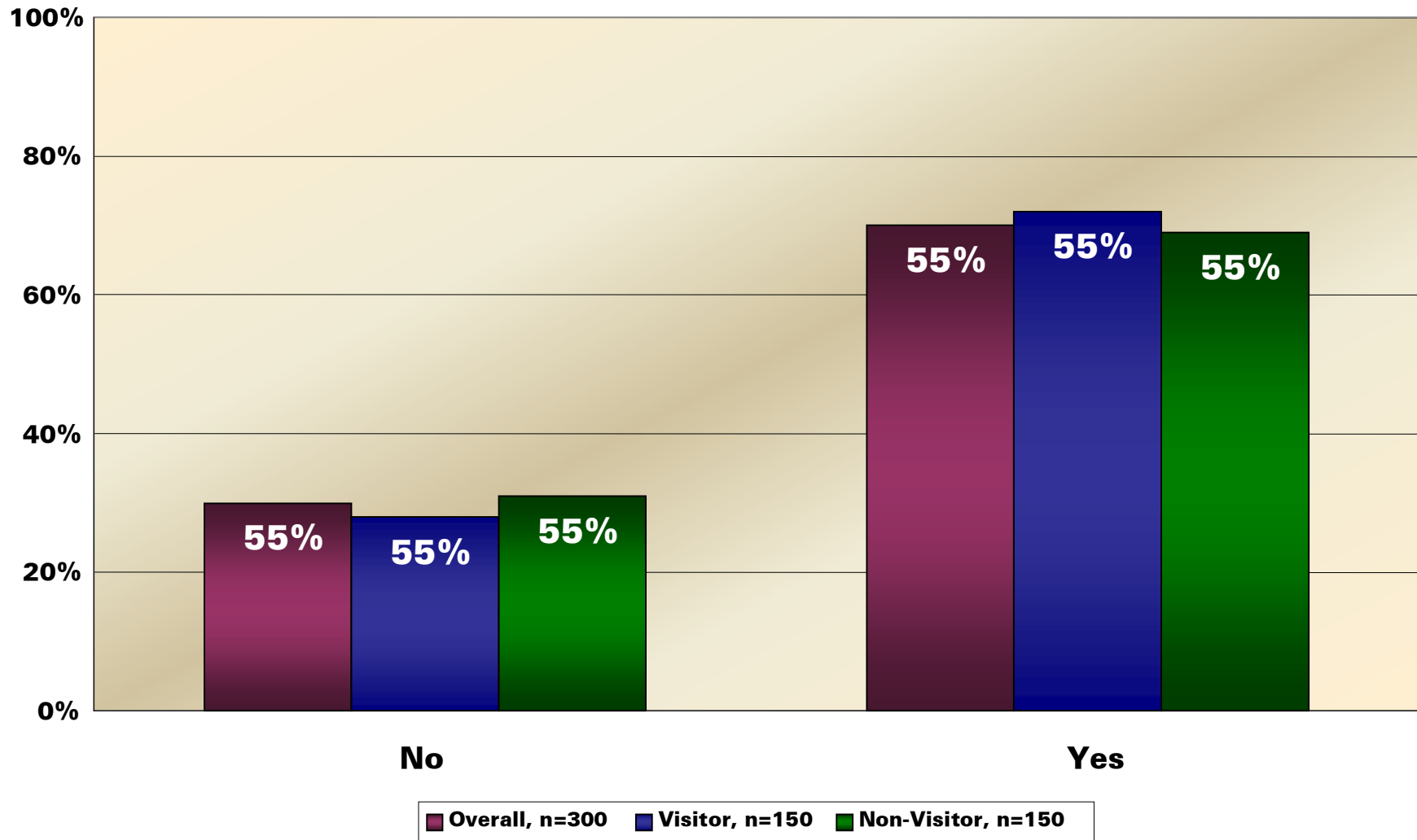
- Men are more likely to travel in groups (they travel with an average of 5.5 adults) compared to women (they travel with an average of 5 adults).

Age Groups Traveling in Party

During Last Trip - Mean

| | Overall | Visitor | Non-Visitor |
|--------------------------------------|---------|---------|-------------|
| Children under the age of 18 | 0.5 | 0.5 | 0.5 |
| Adults between the ages of 18 and 64 | 5.5 | 5.5 | 5.5 |
| Seniors 65 years of age and older | 5.5 | 5.5 | 0.5 |

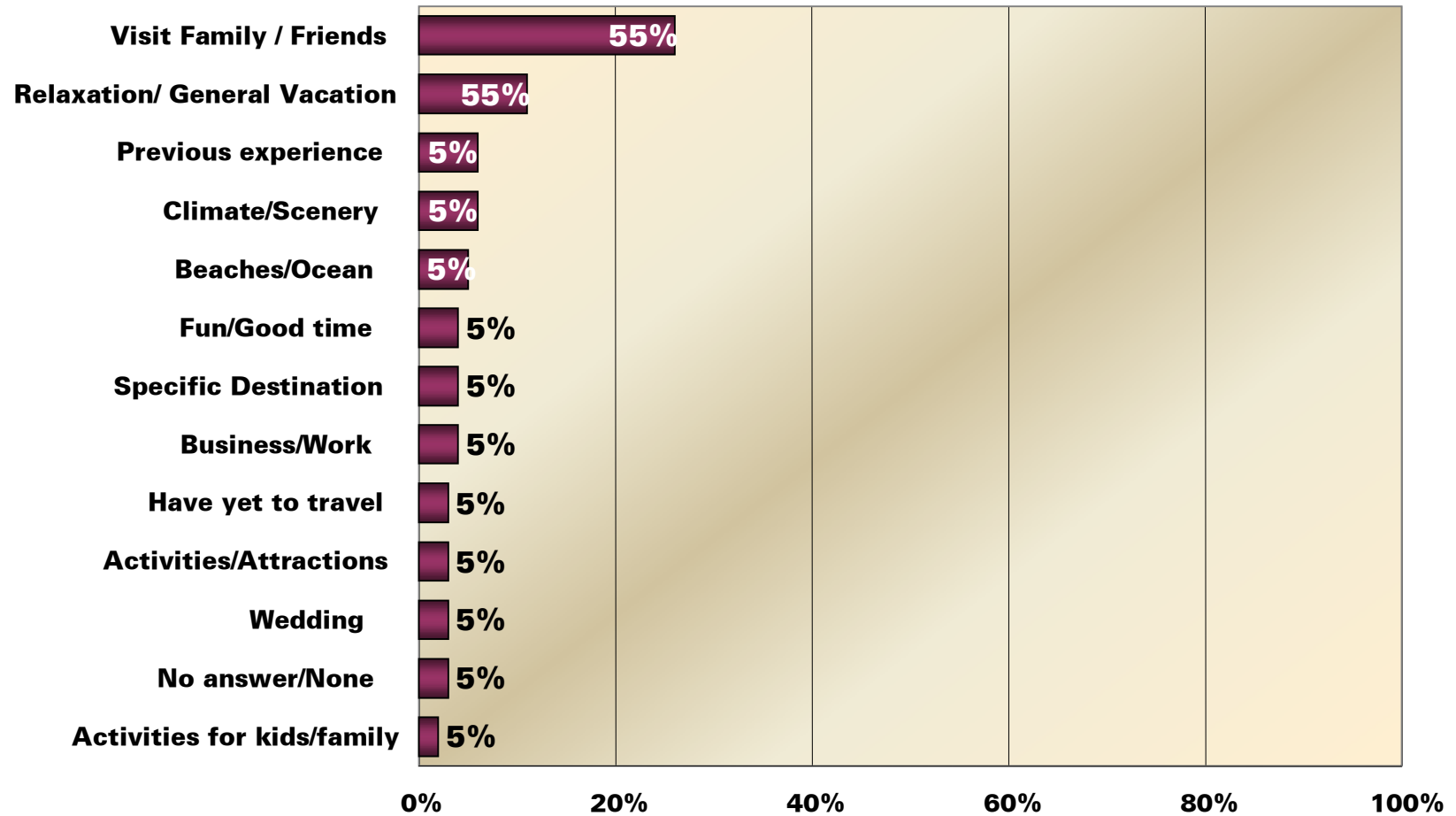
Traveled With Friends During Last Trip



Non-visitors Section

Reason for Travel

Reason for Most Recent Travel



Consider Visiting your Area

- A majority of respondents would consider visiting your area.

| Consider Visiting | |
|--------------------------|-----|
| <i>n</i> | 300 |
| Definitely | 55% |
| Possibly, need more info | 55% |
| No | 55% |

Consider Visiting your Area (cont.)

- Travelers who spend more are apparently less open to visiting your area. This has implications for the types of activities your area promotes to prospective visitors.

| | Annual travel spending under \$1500 | Annual travel spending \$1500 or more |
|--------------------------|-------------------------------------|---------------------------------------|
| <i>n</i> | 150 | 150 |
| Definitely | 55% | 55% |
| Possibly, need more info | 55% | 55% |
| No | 55% | 55% |

Reason for Not Considering your Area as a Destination

| Reasons for not Visiting | Overall |
|--|---------|
| <i>n</i> | 55 |
| It does not provide activities that I am interested in | 55% |
| No interest or reason to visit | 55% |
| Rather go somewhere else | 55% |
| Other | 55% |

Influences Selection of Travel Destination

| Influences Selection of Travel Destination | Overall |
|--|---------|
| <i>n</i> | 150 |
| Advertisements on the radio | 55% |
| Internet web sites | 55% |
| Travel features on TV | 55% |
| Magazine articles | 55% |
| Travel features on the radio | 55% |
| Magazine advertisements | 55% |
| Information or ads in the mail | 55% |
| Advertisements on TV | 55% |
| Billboards and outdoor advertising | 55% |
| Newspaper advertisements | 55% |
| Travel agent | 5% |
| Newspaper articles | 5% |
| Information from friends, family, or acquaintances | 5% |

Newspapers Read by Respondents

Specific Newspapers Used to Learn About Travel Destination

Overall

n

150

ABC Times

55%

ABC Union

55%

ABC Bee

55%

ABC News

55%

ABC Chronicle

55%

XYZ Times

5%

ABC Register

5%

ABC Press

5%

XYZ Bee

5%

Other

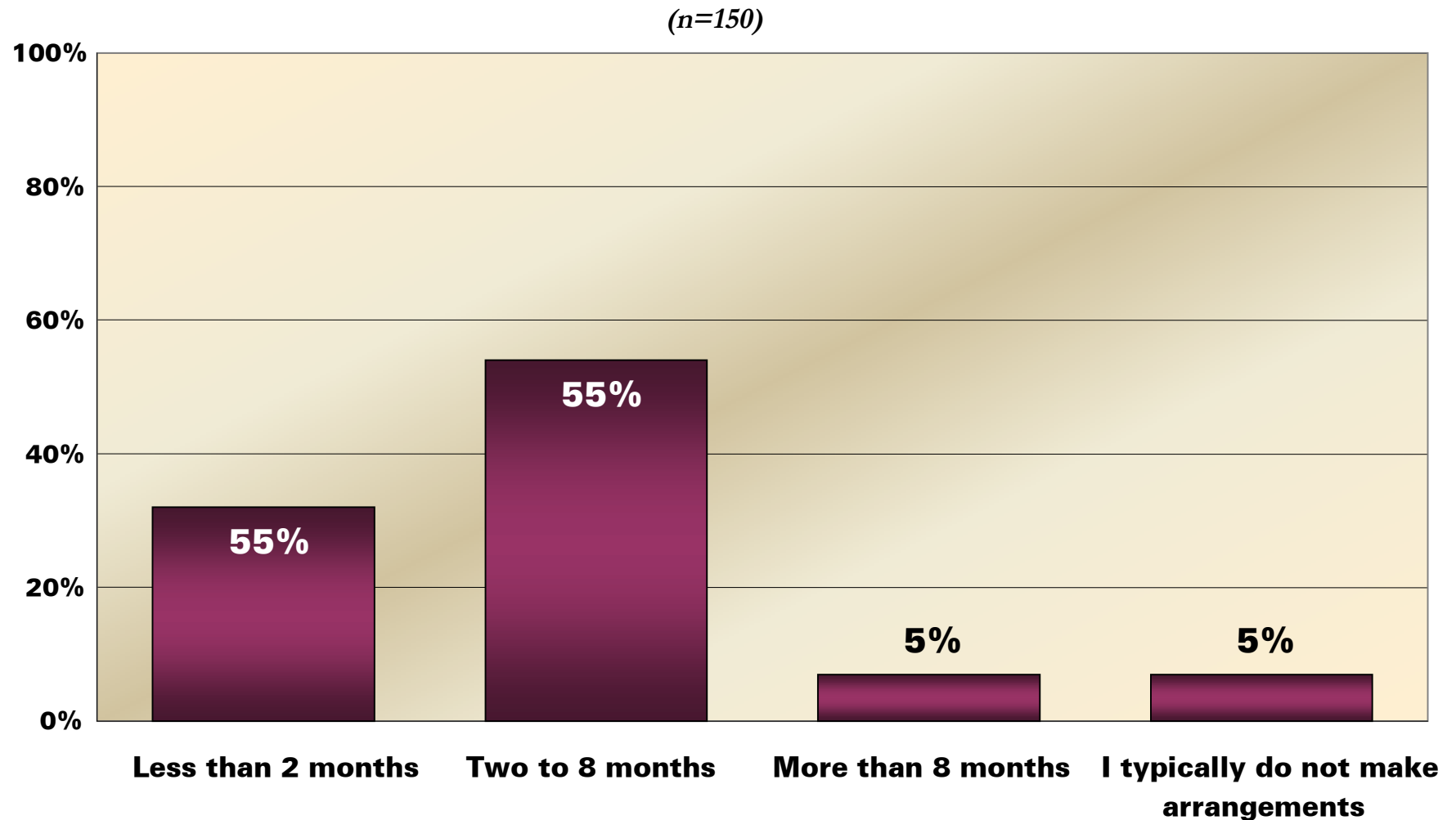
55%

Resources for Planning Future Trips

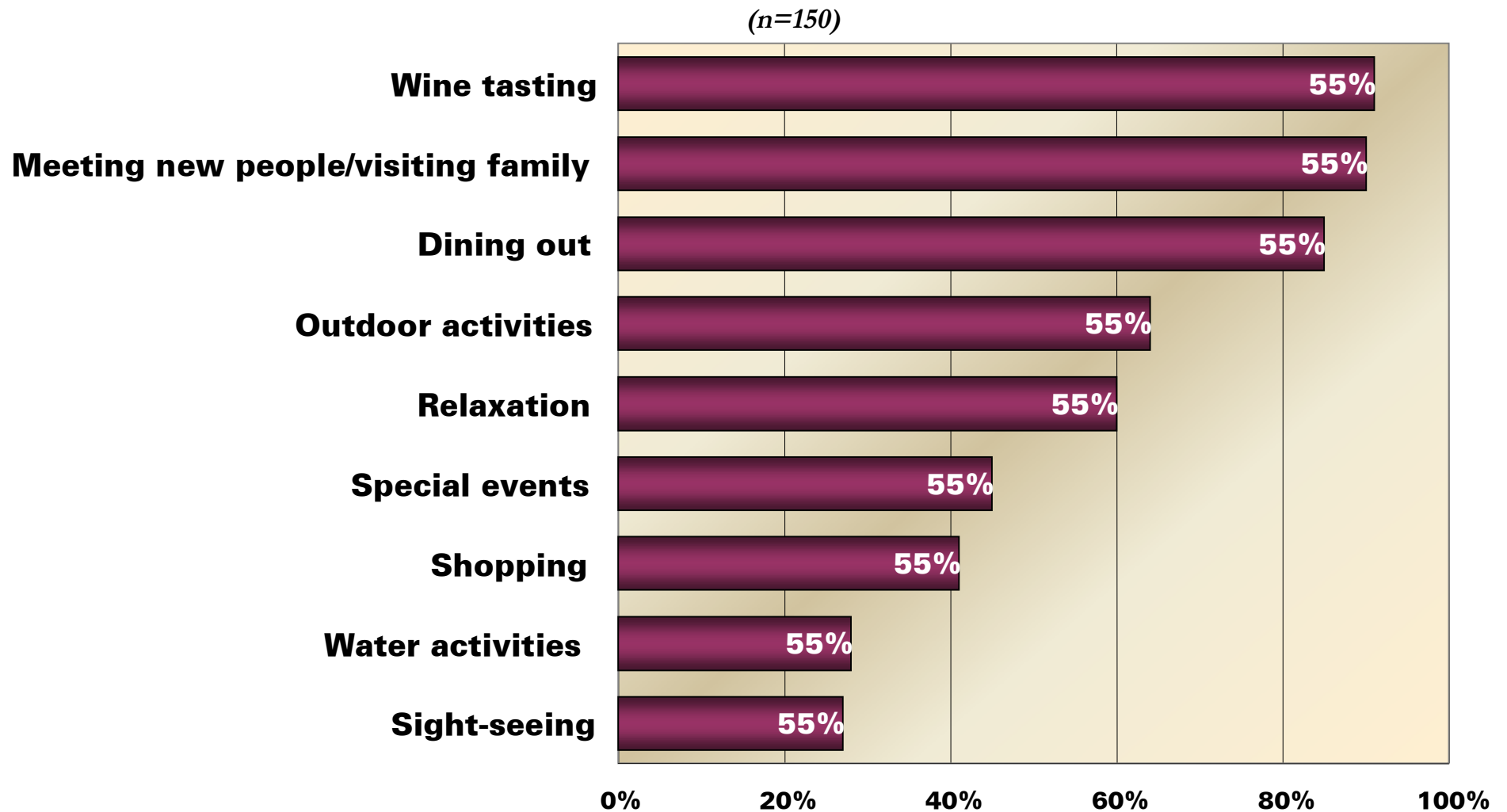
- Automobile clubs were the preferred resource for planning travel, especially among individuals under the age of 55 (55% vs. 5% for older respondents). Older respondents were more likely to use Internet web sites (55% vs. 5% for younger respondents). Women were more likely to use books (55% vs. 5% for men), as were respondents that spent more than \$5,500 a year on travel.

| Resources Most Likely to Use for Planning Trips in the Future | Overall |
|---|---------|
| <i>n</i> | 150 |
| Travel agent | 55% |
| Magazines and/or Newspapers | 55% |
| Books (e.g. travel guides) | 55% |
| Internet web sites | 5% |
| Automobile clubs | 5% |

Timing of Travel Arrangements



Activities Enjoyed When Traveling



Overall Aspect Importance

- Respondents were allowed to rate each aspect on a scale of 1 to 5 with 5 being “Very Important” and 1 being “Not at All Important”.
- These aspects should be foremost in the minds of communicators as your area develops its public message.

| Importance of Each Aspect of a Travel Destination | Mean |
|---|------|
| Activities available | 5.5 |
| Accessibility for your travel preference | 5.5 |
| Uniqueness of experience or location | 5.5 |
| Affordability | 5.5 |
| Climate/seasonal characteristics | 5.5 |
| Distance between your home and the destination | 5.5 |

Aspect Importance

Ratings of 4 & 5

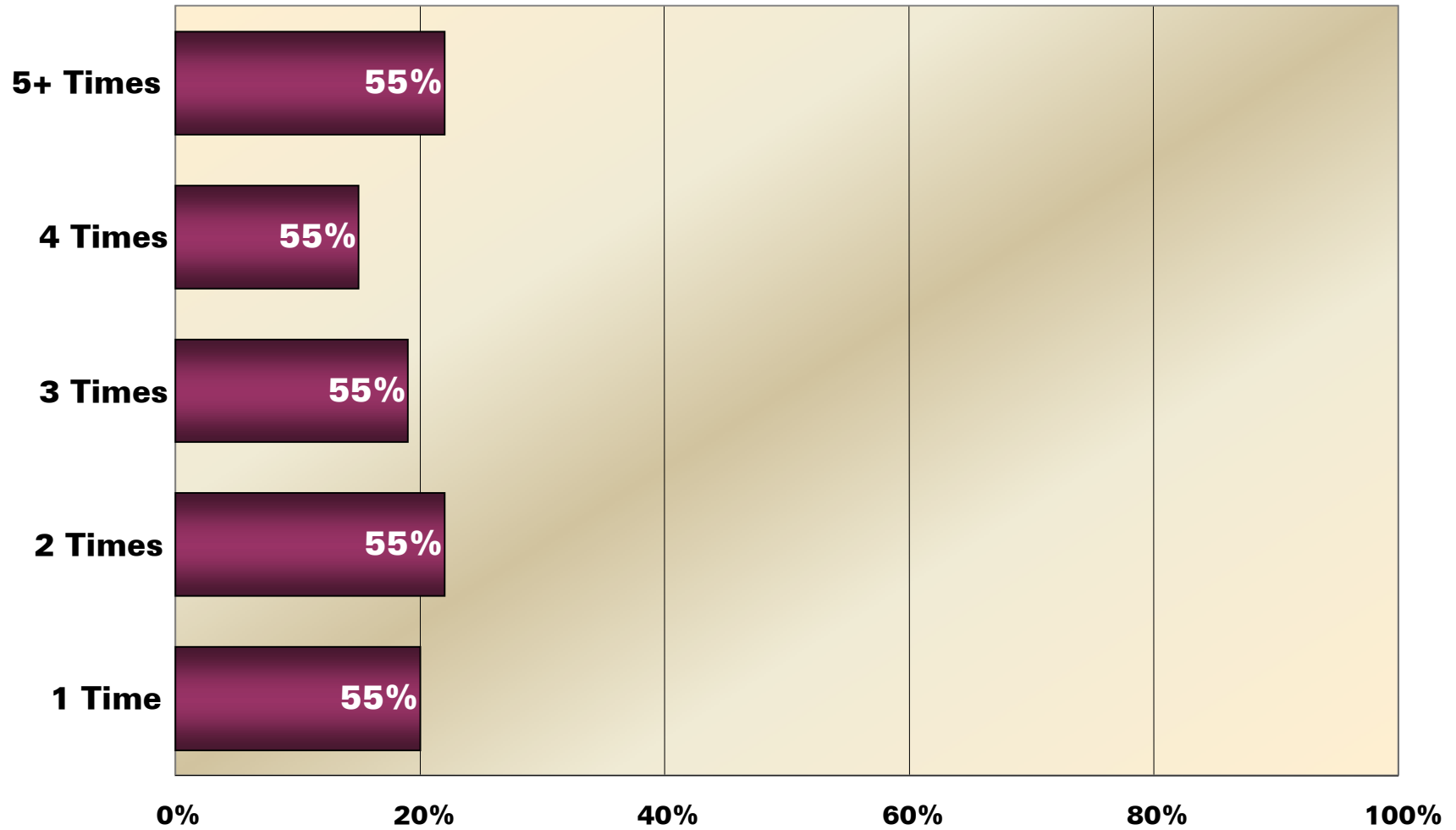
- Given these rankings, your area might position itself as a great place to visit that doesn't require a lot of travel.

| Importance of Each Aspect of a Travel Destination | Ratings of 4 | Ratings of 5 |
|---|--------------|--------------|
| Distance between your home and the destination | 55% | 55% |
| Climate/seasonal characteristics | 55% | 55% |
| Uniqueness of experience or location | 55% | 55% |
| Accessibility for your travel preference | 55% | 55% |
| Activities available | 55% | 55% |
| Affordability | 55% | 55% |

Visitors Section

Total Visits to Your Area

(n=150)



Your Area as a Destination

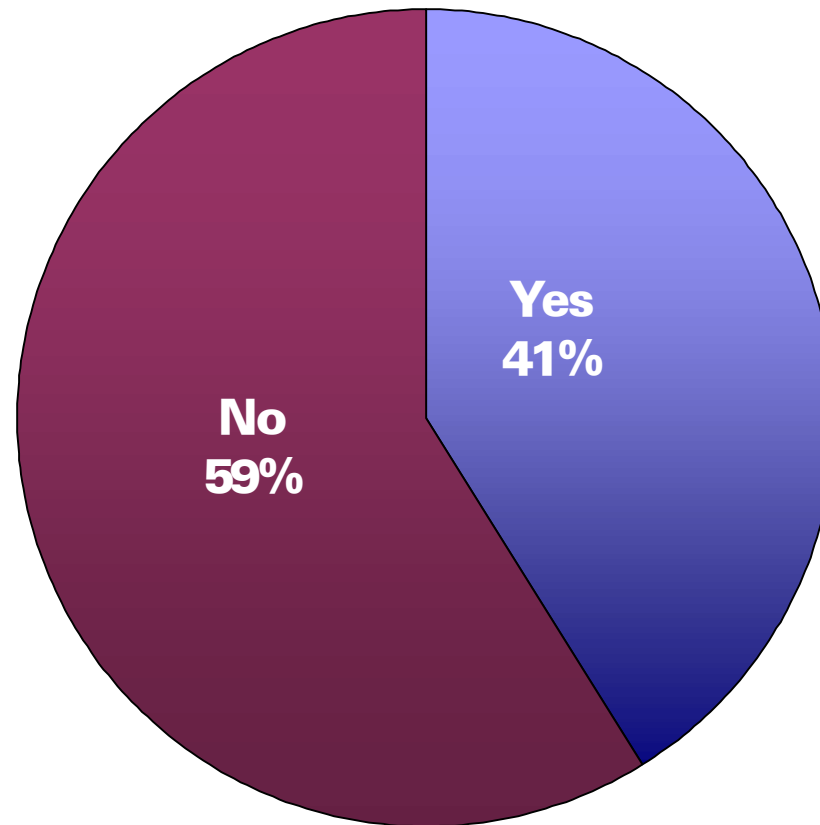
- Fifty-five percent of respondents that had spent the night in your area identified it as their primary destination, vs. only 5% for visitors that did not spend the night.

| Your Area as a Destination | Overall |
|---|---------|
| <i>n</i> | 150 |
| One of a few key stops on your trip | 55% |
| The primary destination for your trip | 55% |
| Place to visit while traveling to another destination | 55% |

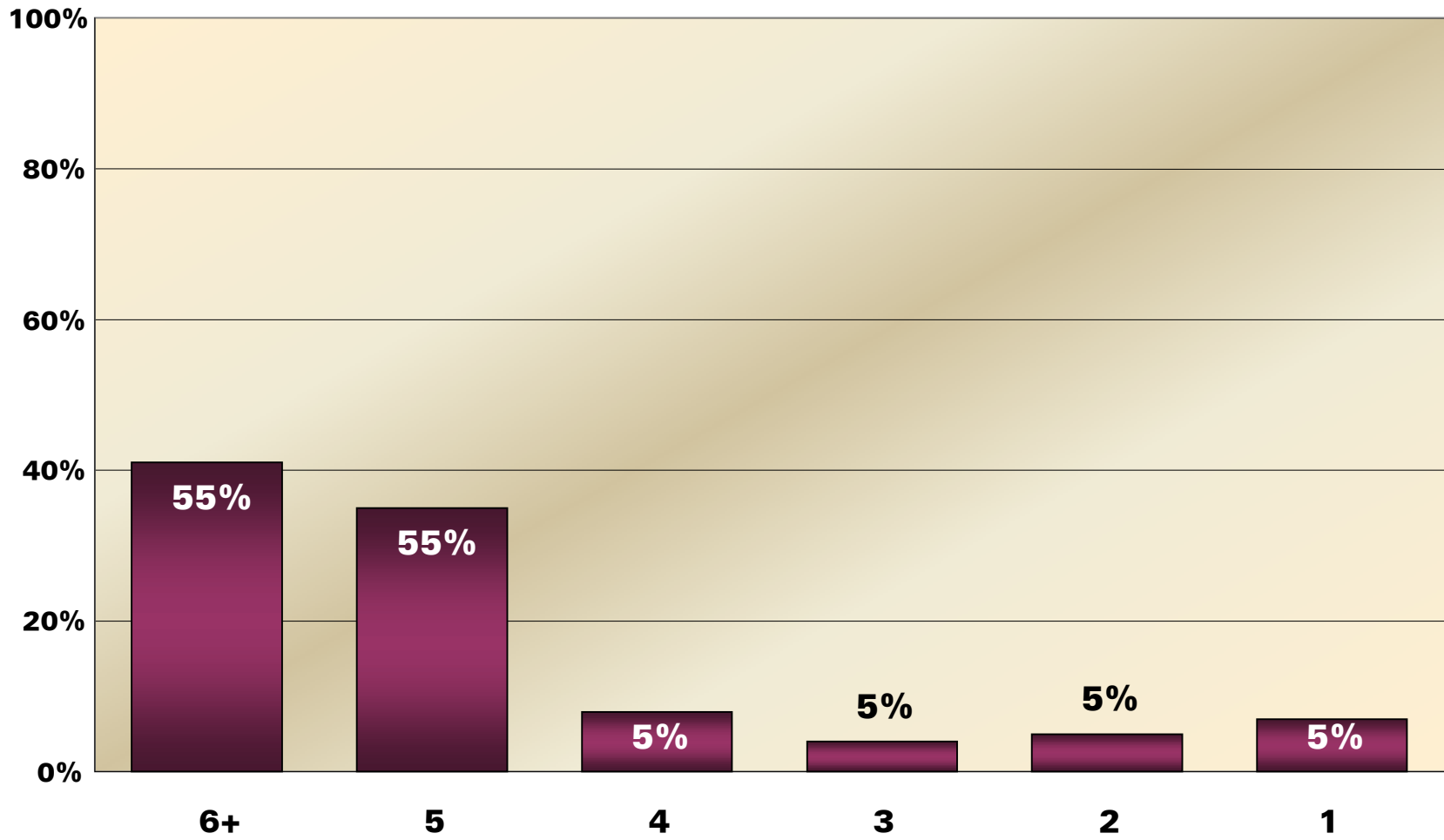
Primary Destination When Traveling Through your Area

| Primary Destination | Overall |
|---------------------------|---------|
| City A | 55% |
| Destination Non-specific | 5% |
| ABC Beach | 5% |
| Don't remember/Don't know | 5% |
| City B | 5% |
| City C | 5% |
| City D | 5% |
| City E | 5% |
| ABC National Forest | 5% |
| City F | 5% |
| Beach Non-specific | 5% |
| City G | 5% |
| Mount ABC | 5% |
| ABC Lake | 5% |
| City H | 5% |

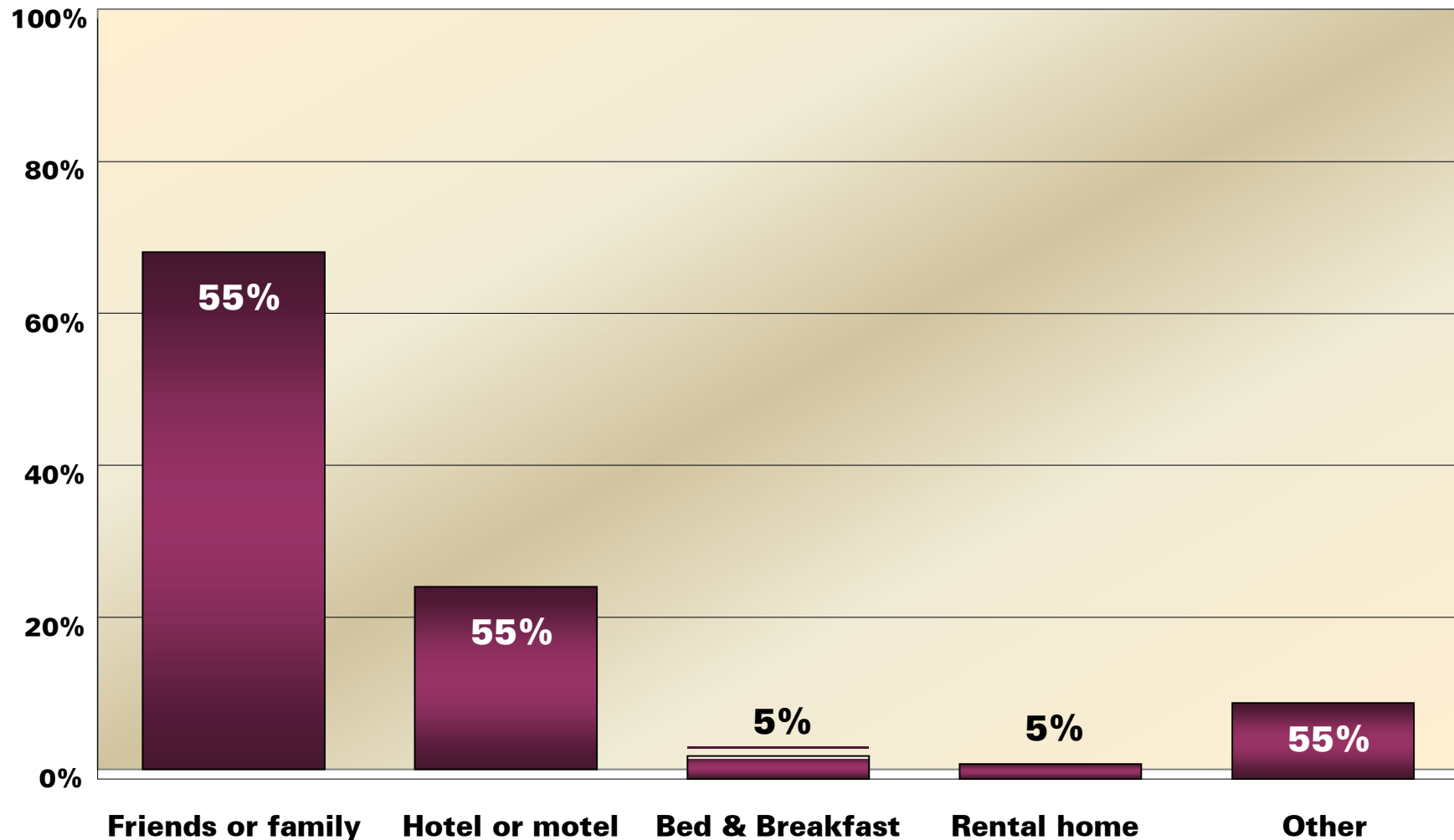
Spent the Night in your Area



Nights Stayed in your Area



Type of Accommodations



Specific Reason for Visiting your Area

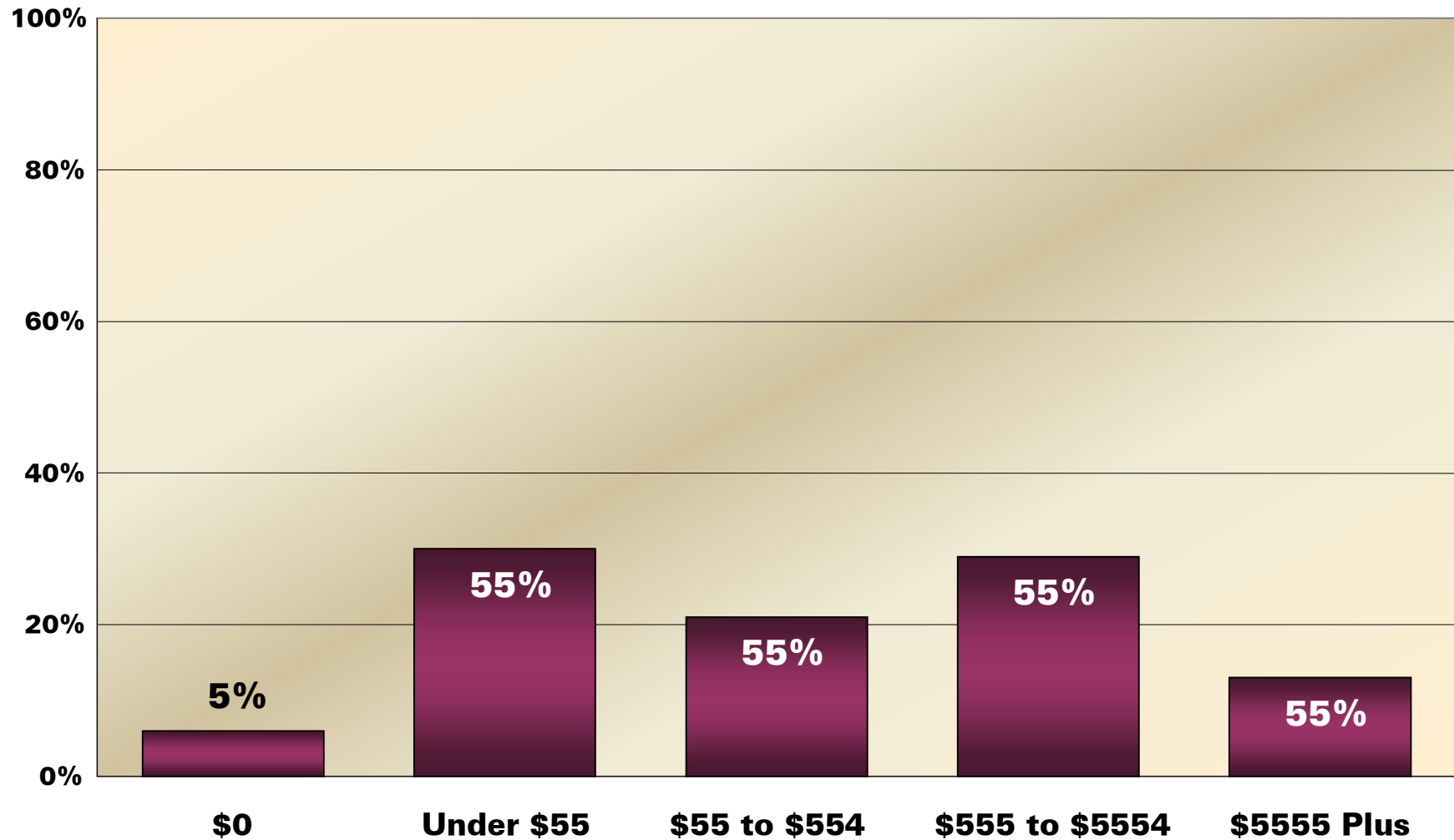
- No single reason for visiting stands out. Shopping and fine dining are prominent.

| Specific Reason for Decision to Visit | Overall | Specific Reason for Decision to Visit | Overall |
|---|---------|---------------------------------------|---------|
| Climate/Scenery | 5% | Child Graduation | 5% |
| Visiting Friends | 5% | Old-time Taverns | 5% |
| Restaurants/Bars/Food | 5% | Atmosphere/Beauty/Beautiful City | 5% |
| Amenities/Sites/Sight seeing /Look around | 5% | Good distance/Nice drive | 5% |
| Conference/Business/Work | 5% | Beaches / Ocean | 5% |
| Specific function/event/ festival | 5% | Shopping | 5% |
| Family / visit / function | 5% | No reason/Don't know/None | 5% |
| Vacation/Relaxation/Get away | 5% | Hotels/Downtown | 5% |
| Historic Areas | 5% | Haunted House | 5% |
| Previous experience | 5% | Big Bay | 5% |
| Gas/Lodging/Good place to stop | 5% | Contests | 5% |
| Passing through | 5% | Hospital Care | 5% |
| Lighthouses | 5% | Fun/Nice place/Quaint | 5% |
| Heard good things | 5% | | |

Source of Awareness

| How the had Heard of your Area | Overall |
|---|---------|
| <i>n</i> | 150 |
| Newspaper articles | 55% |
| Information or ads in the mail | 55% |
| Magazine advertisements | 5% |
| Advertisements on the radio | 5% |
| Travel features on TV | 6% |
| Information from friends, family, or acquaintance | 5% |
| Newspaper advertisements | 5% |
| Magazine articles | 5% |
| Travel agent | 5% |
| Advertisements on TV | 5% |
| Billboards and outdoor advertising | 5% |
| Travel features on the radio | 5% |
| Internet web sites | 5% |
| Other | 55% |

Amount Spent in your Area



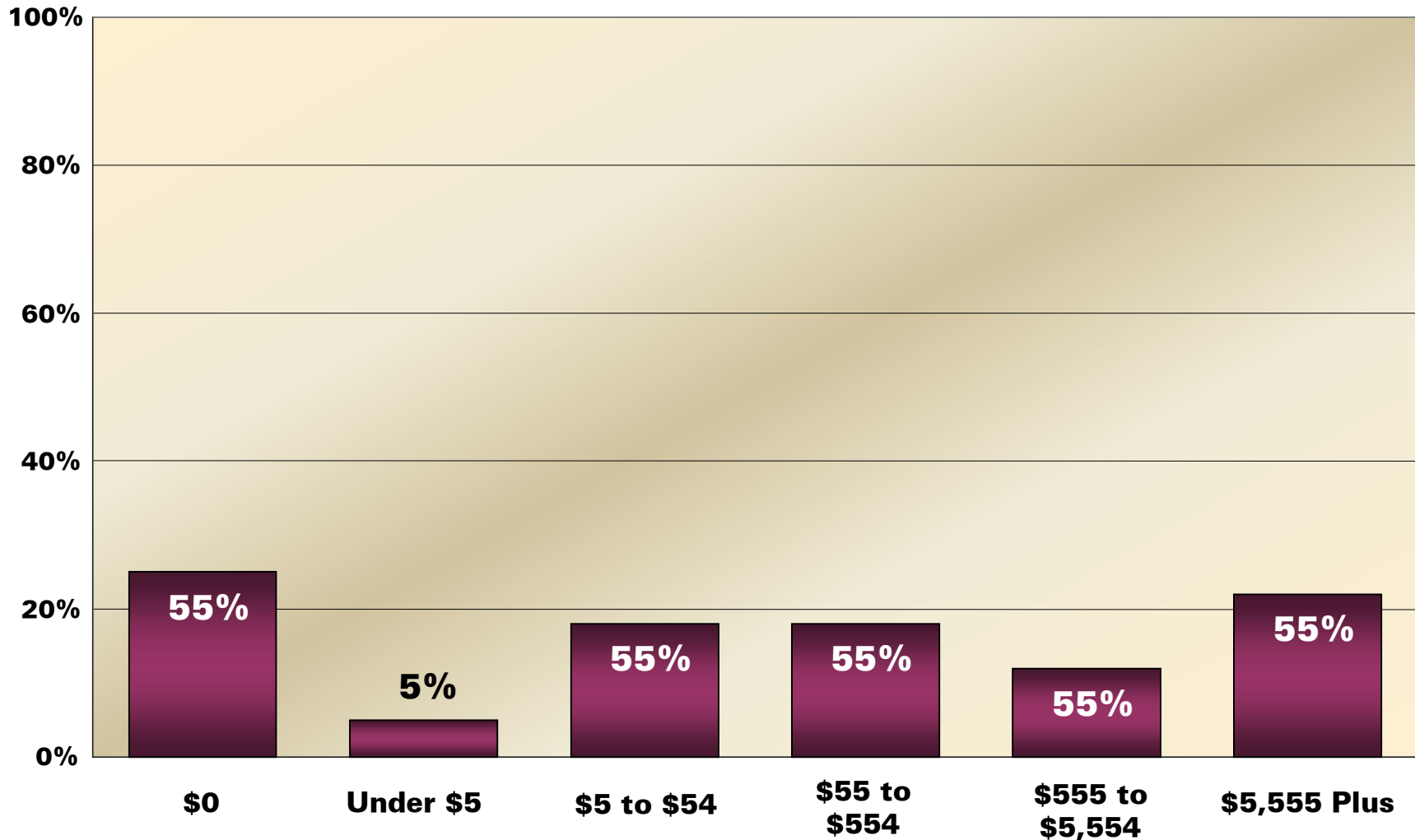
Amount Spent in your Area (cont.)

- Fifty-five percent of households with incomes of \$55k or more reported spending \$555 or more during their most recent visit to your area, compared to only 5% of less wealthy households.

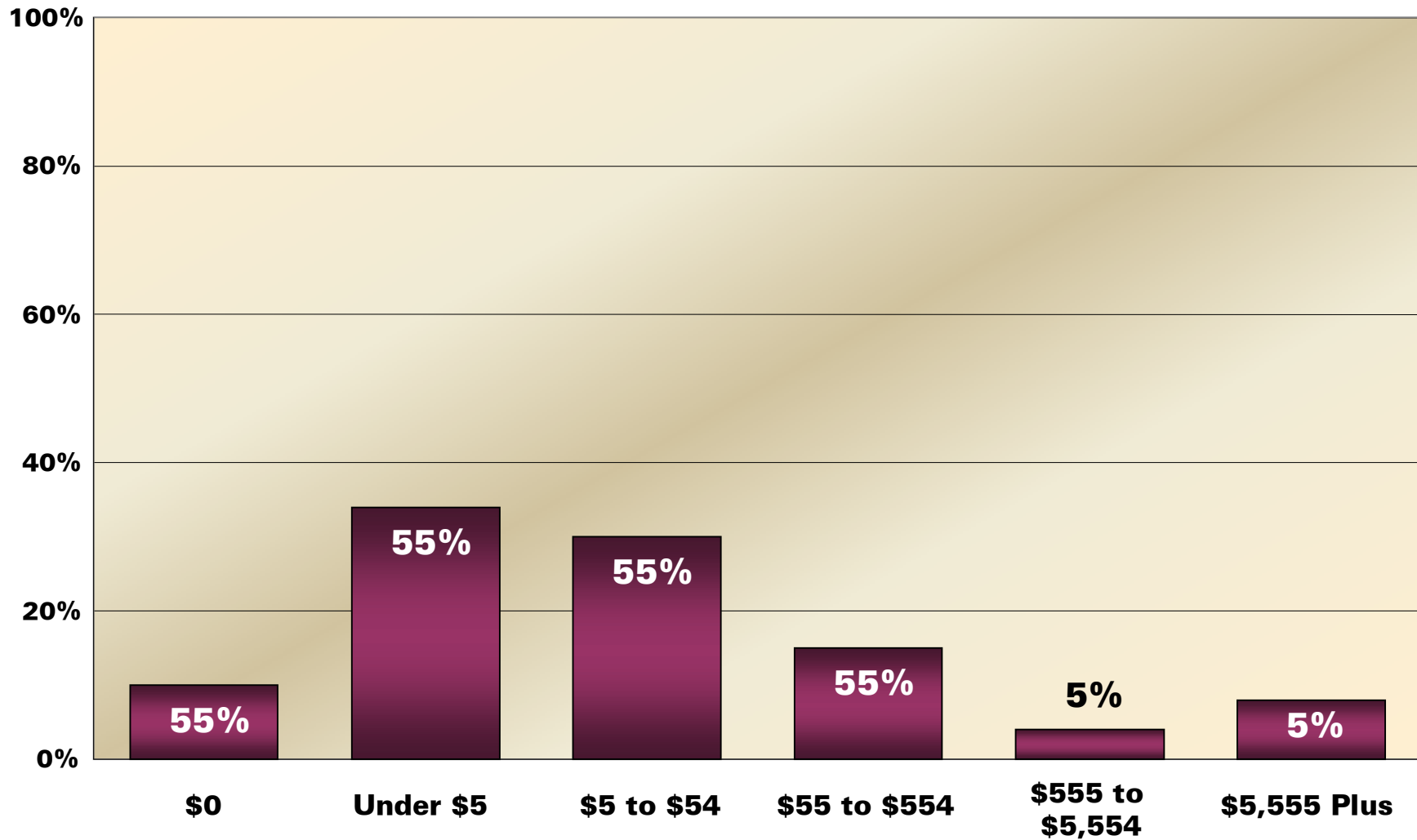
| | Age | | Income | | Spent the Night | | Annual Travel | |
|--------------|----------|-------|-------------|---------------|-----------------|-------|---------------|-----------------|
| | Under 45 | 45+ | Under \$50k | \$50k or More | Yes | No | Under \$1,500 | \$1,500 or More |
| Amount Spent | \$555 | \$555 | \$555 | \$555 | \$555 | \$555 | \$555 | \$555 |

Amount Spent on Lodging

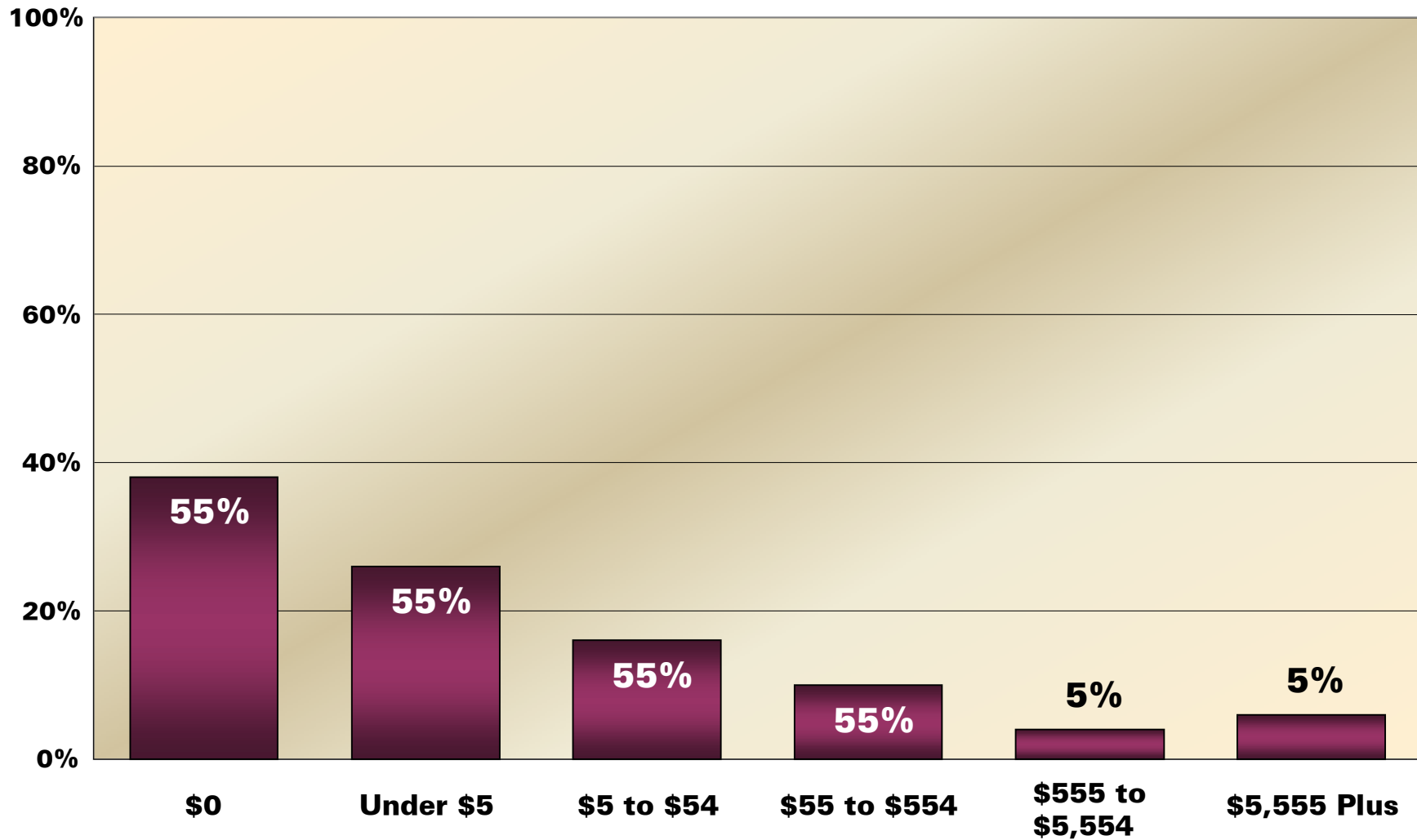
Among only visitors who spent the night



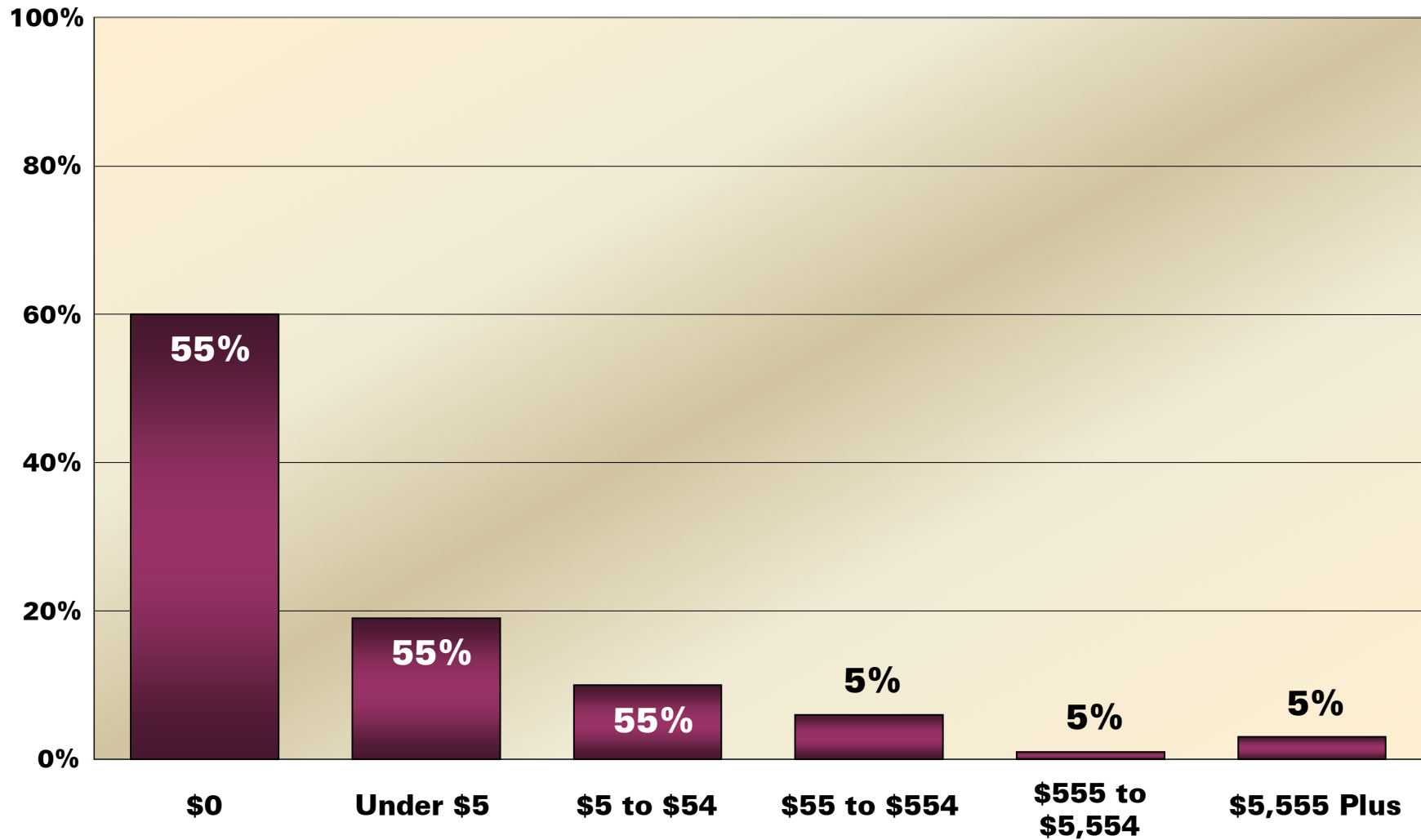
Amount Spent on Meals



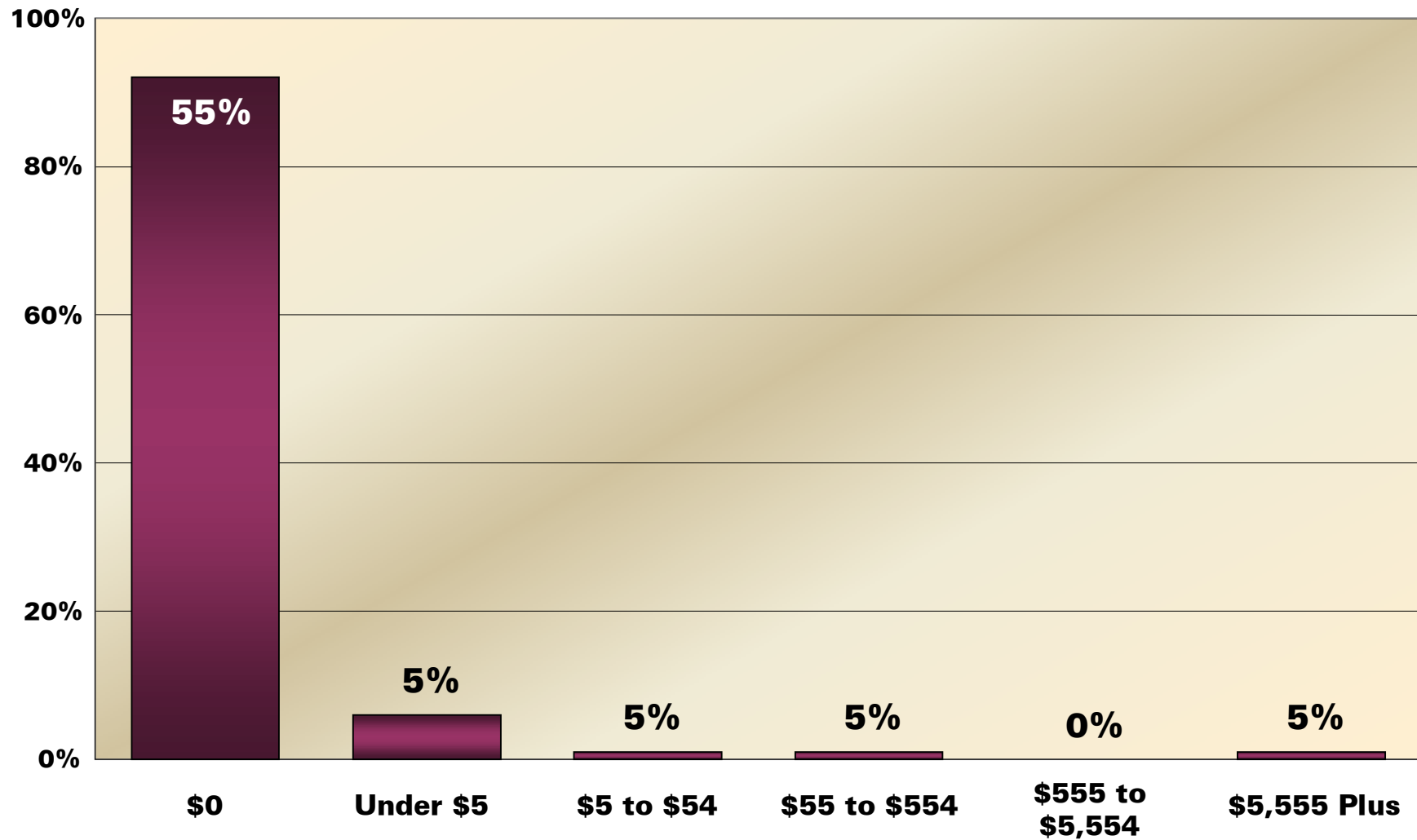
Amount Spent on Shopping



Amount Spent on Activities



Amount Spent on Transportation



Conclusions

- Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus consequat ante et lectus pellentesque placerat. Phasellus consequat placerat mauris.
- Nunc lobortis, tortor a gravida tincidunt, massa enim sagittis ligula, at pharetra mi diam sed tortor. Aliquam non odio. Integer magna. Cras ut massa a felis ornare sollicitudin.
- Ut tincidunt nunc non massa. Duis suscipit. Nam sit amet erat. Etiam ornare mauris et massa.
- Nulla vitae tortor eu urna pulvinar iaculis.