North Tahoe ‘20/21 Ski Season Roundtable

SEPTEMBER 17, 2020

Thank you to our Snow Committee members here today!

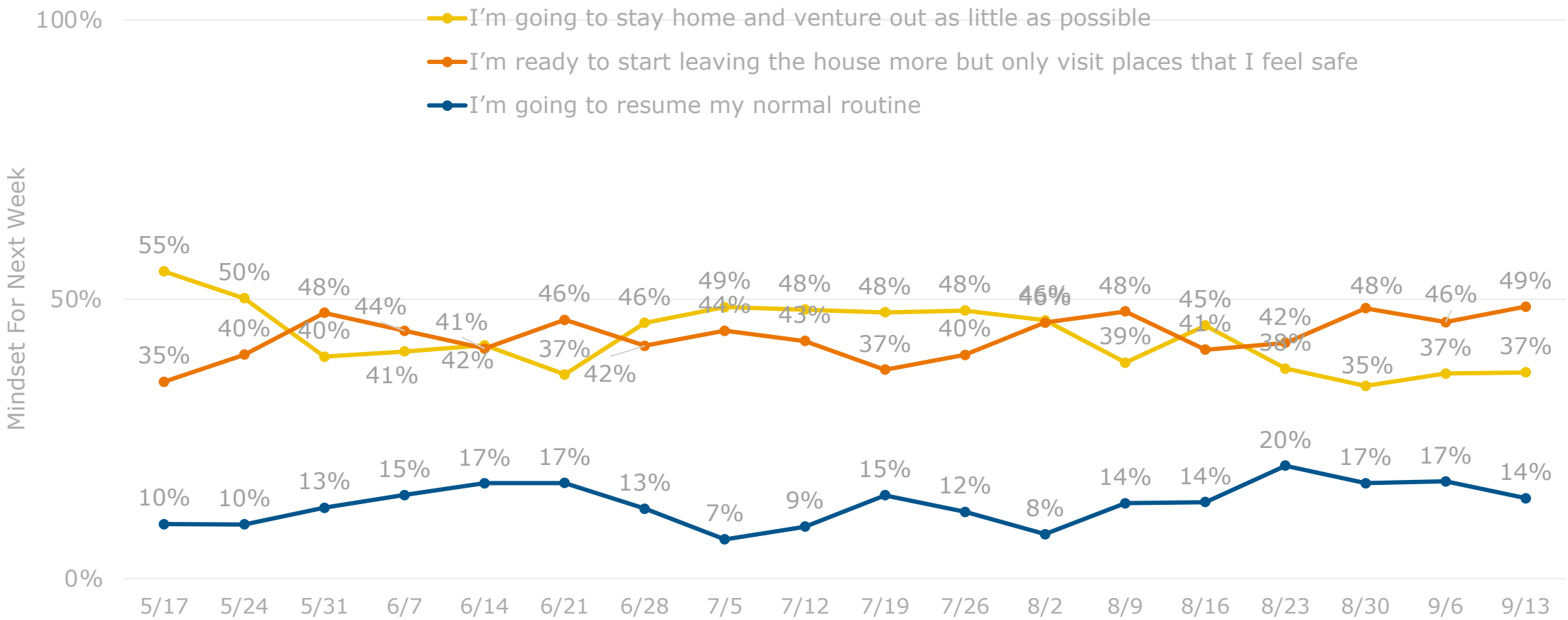
- Jeff Hentz, NLTRA CEO
- Amber Burke, NLTRA Marketing Director
- Michael Reitzell, Ski California Executive Director

Visit California Research Update

Understanding Receptivity to Message

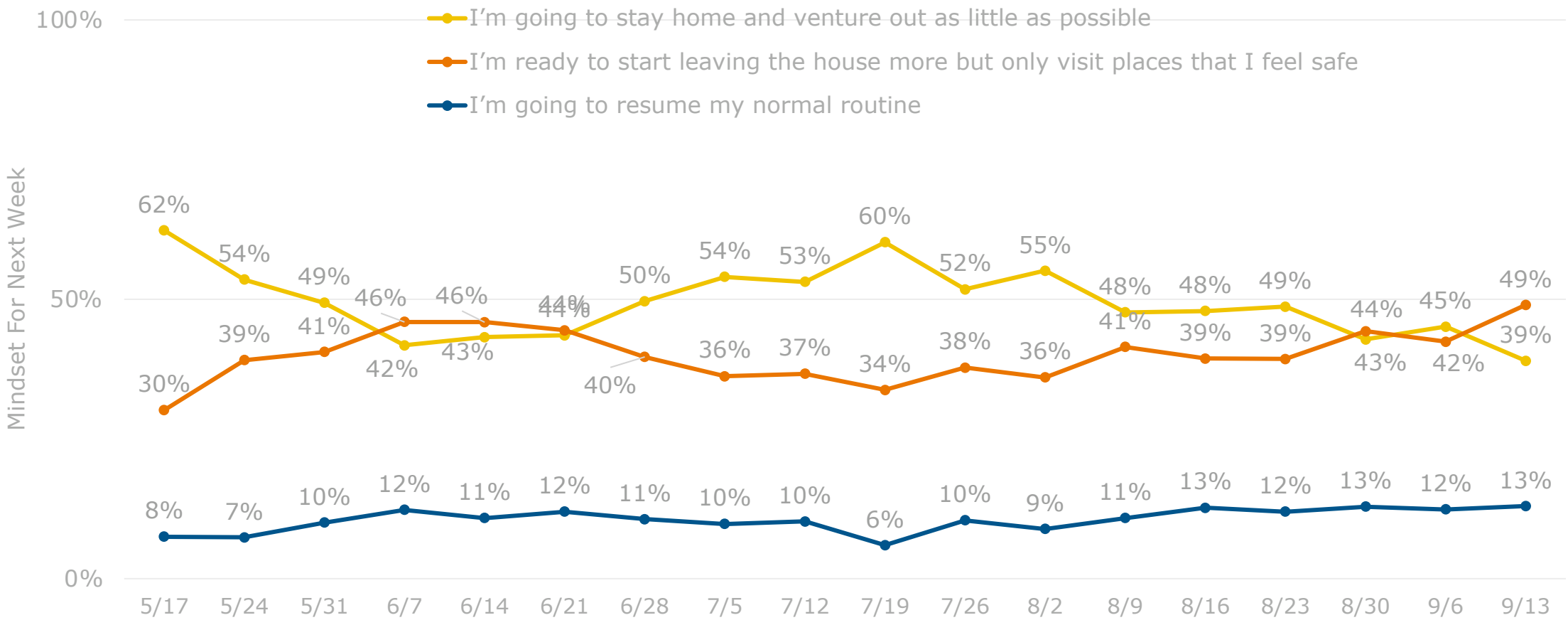
1. General Consumer Sentiment (Mindset)
2. Receptivity to travel/travel messages
3. Reported travel behaviors
4. Reaction to creative (Positive, Negative, Neutral)
5. Content message delivery (attribute pod)

Mindset Towards Resuming Activities (National)



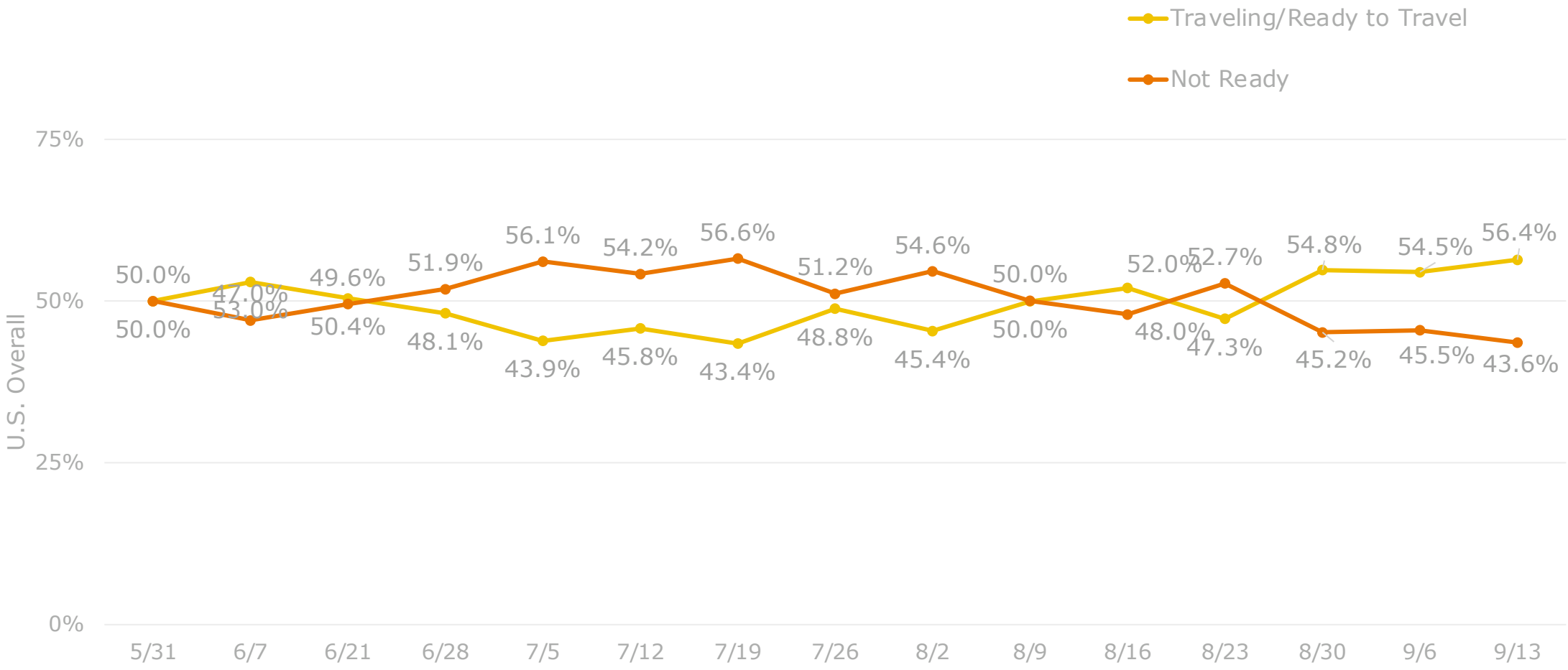
Source: Visit California Research/SMARInsights Weekly Travel Insights Study

Mindset Towards Resuming Activities (CA Residents)



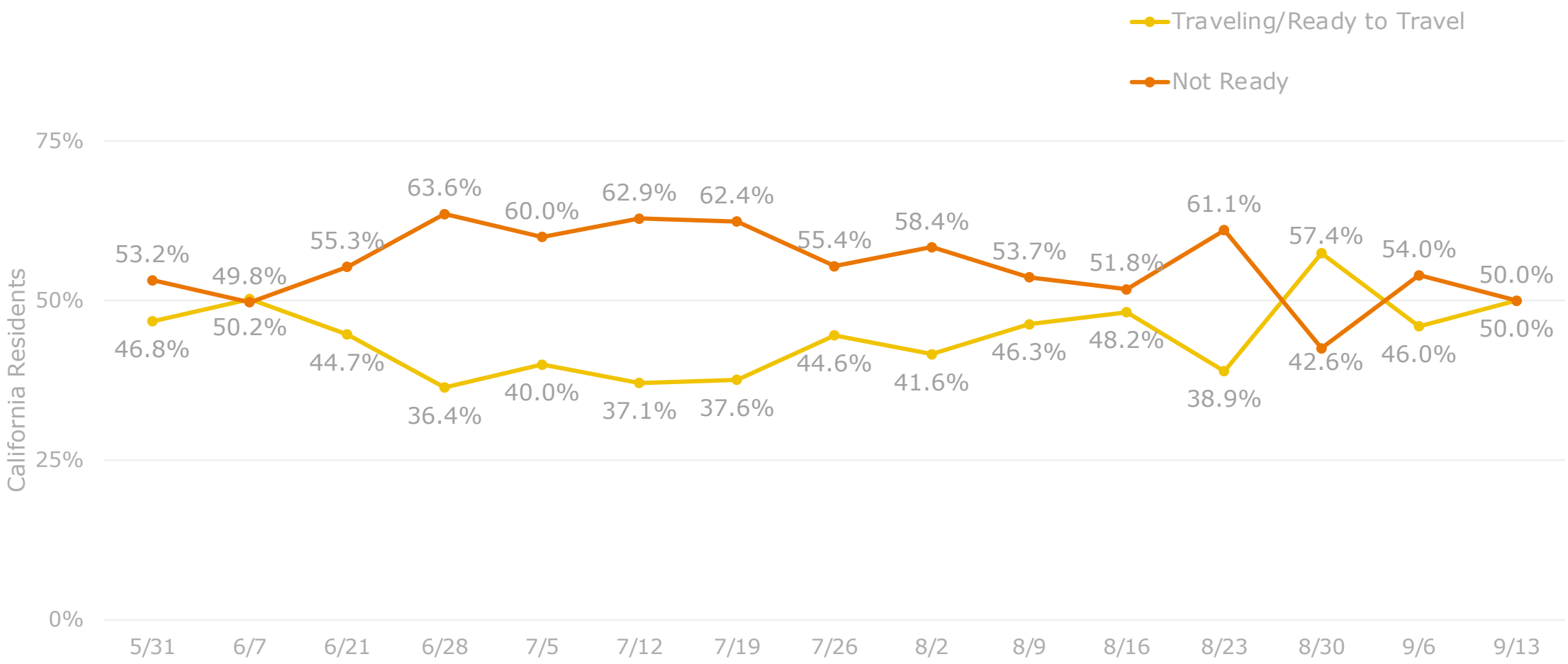
Source: Visit California Research/SMARInsights Weekly Travel Insights Study

Mindset Towards Travel (National)



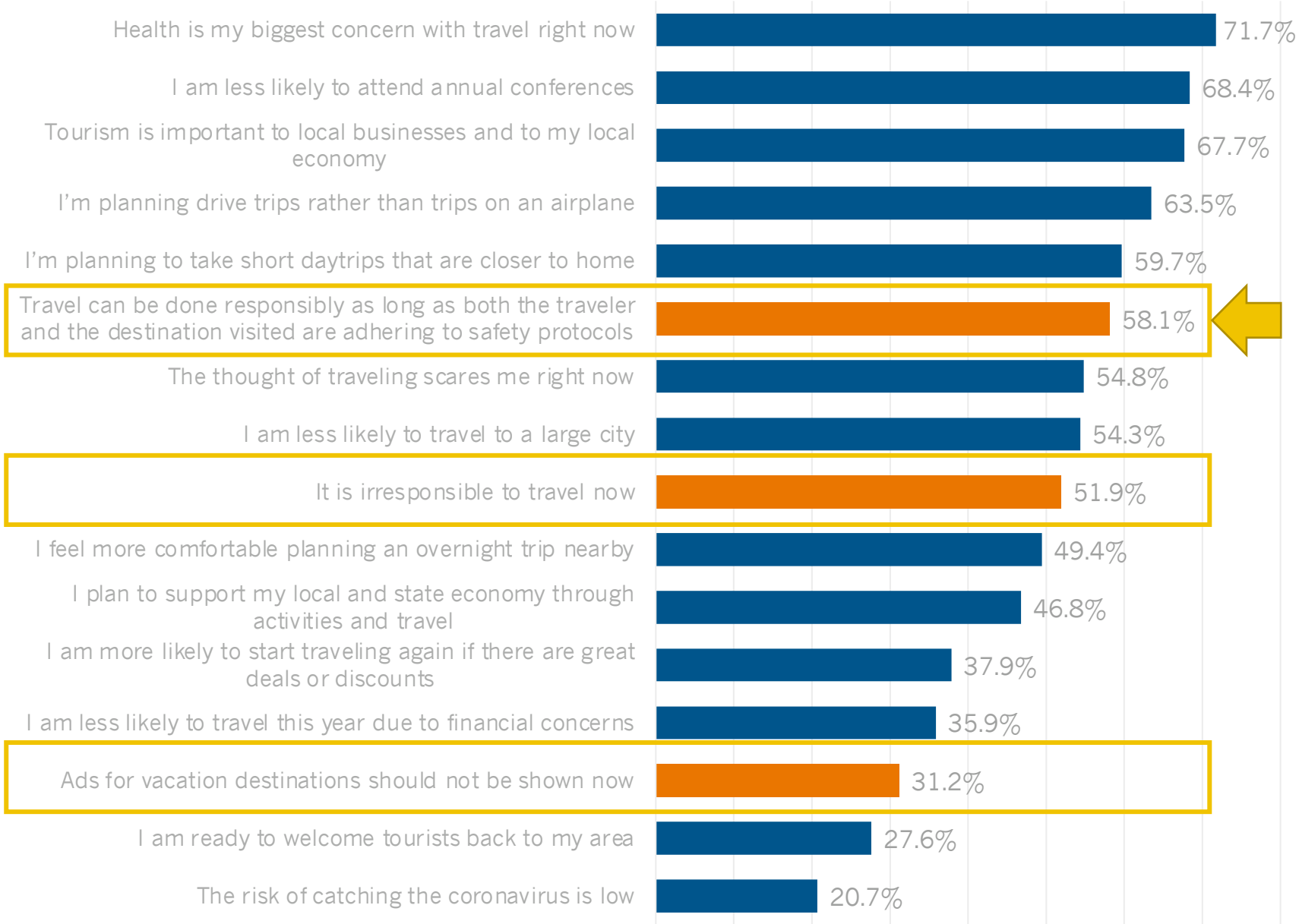
Source: Visit California Research/Destination Analysts

Mindset Towards Travel (California)



Source: Visit California Research/Destination Analysts

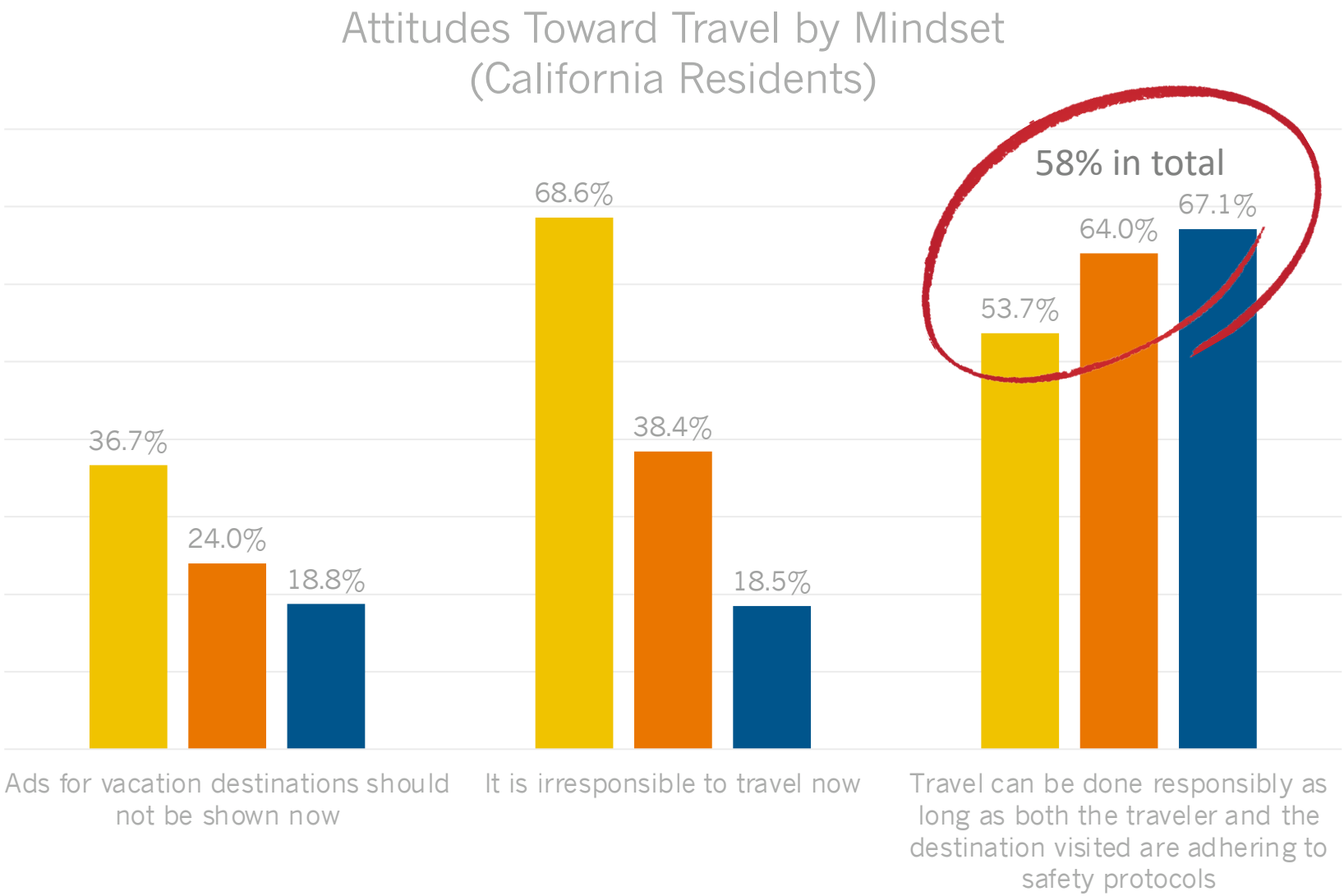
Top 2 Box (Agree/Strongly Agree) – Among CA Residents



- We find that consumers are MORE likely to agree that *"travel can be done responsibly as long as both the traveler and destination are following safety protocols"* than with the statement *"It is irresponsible to travel now"*
- **There is still a lot of ambivalence about travel with 52% of California residents saying travel is irresponsible, but there is receptivity to the idea of "safe travel" if rules are followed.**
- Despite elevated concerns about health and safety, only 3 out of 10 consumers say destination marketing should not be shown…even lower than the number that say travel is irresponsible.
- Other statements provided for context, all from past week of surveying.

We would like to understand how you are feeling about travel right now due to concerns about the coronavirus.
How much do you agree with the following statements?

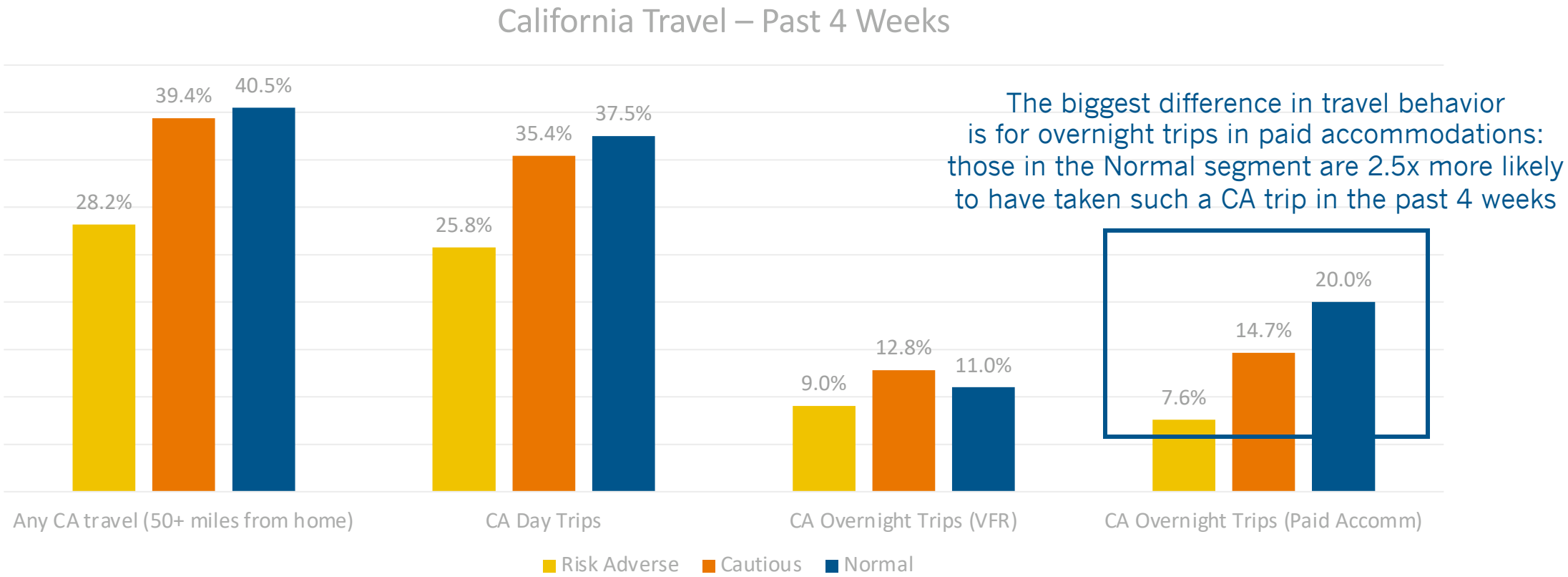
Source: Visit California Research/SMARInsights Weekly Travel Insights Study



- Agreement with the negative travel sentiment statements (ads should not be shown, travel is irresponsible) varies across the three Mindsets as expected.
- But when provided a more nuanced statement about travel, although the same PATTERN is seen across the Mindsets, the opinions are much closer together for the safe travel message.
- Risk Averse are the only group who agree with the irresponsible statement more than the responsible statement, but even then, more than half (54%) agree travel could be done responsibly.

Source: Visit California Research/SMARInsights Weekly Travel Insights Study

Despite their Cautious and even Risk Adverse mindset, we find that some proportion of ALL segments participate in some intra-state travel behavior. Consumers travel within their "comfort zone" of what feels safe.

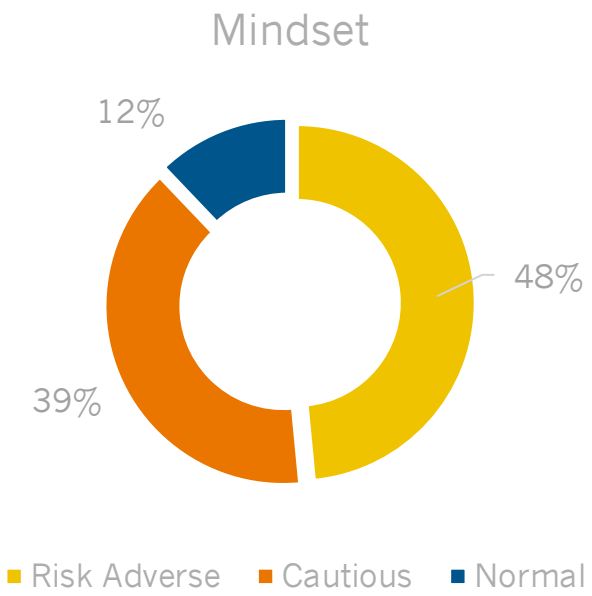


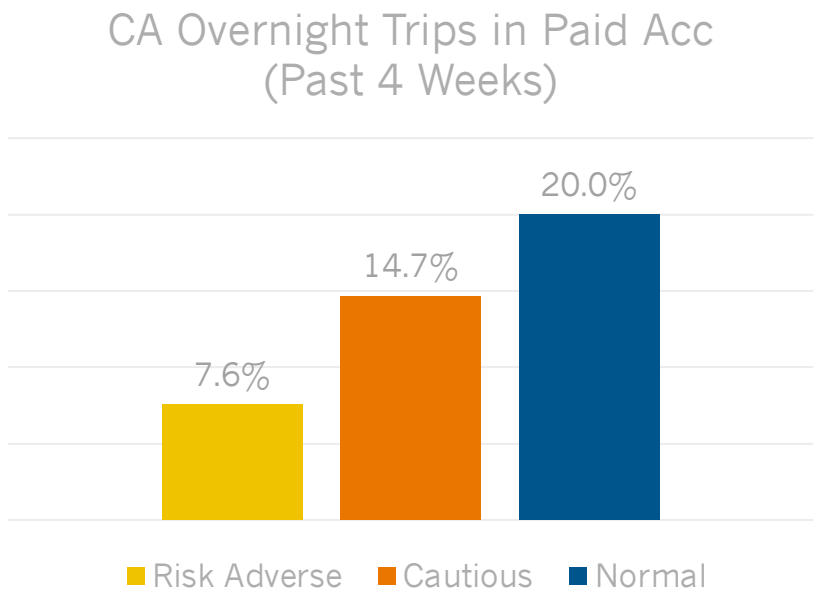
The biggest difference in travel behavior is for overnight trips in paid accommodations: those in the Normal segment are 2.5x more likely to have taken such a CA trip in the past 4 weeks

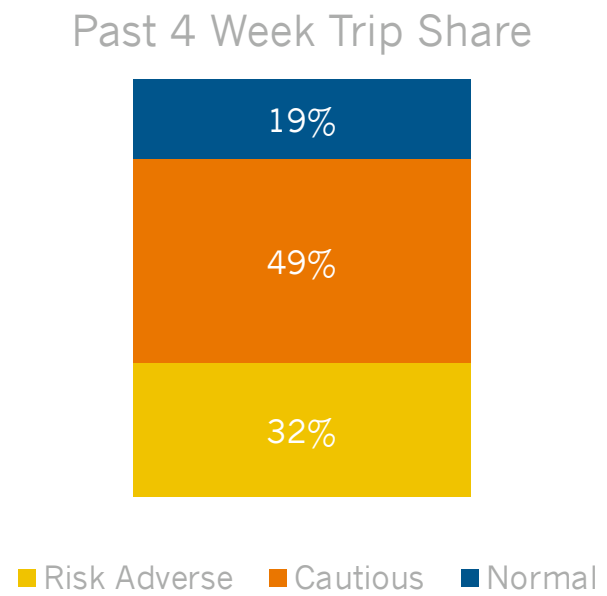
Source: Visit California Research/SMARInsights Weekly Travel Insights Study

Despite their much lower levels of engagement, the SIZE of the Risk Adverse segment means they still represent more VALUE...as well as the best OPPORTUNITY (compared to Normal).

Size of Mindset Segment ✖ **Incidence of Travel (Paid Acc Trips)** = **Share of Paid Accommodation Trips by Mindset Segment**

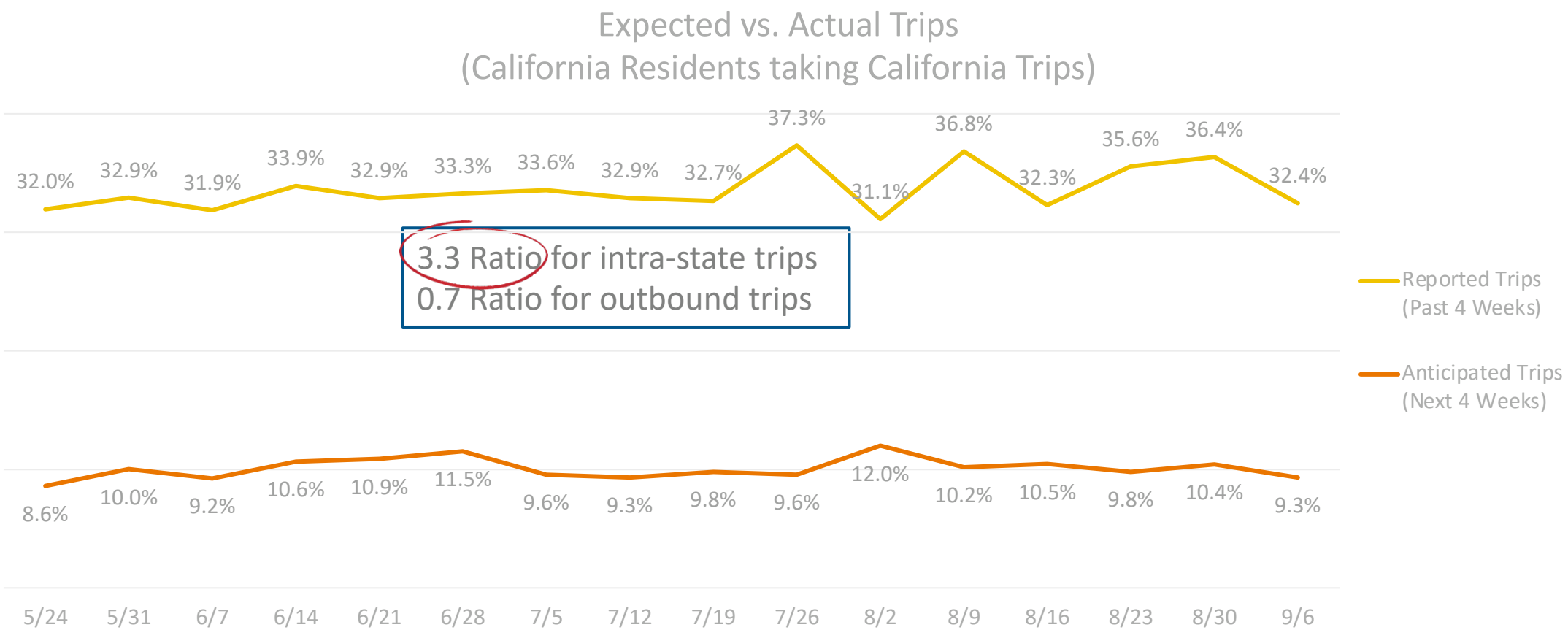






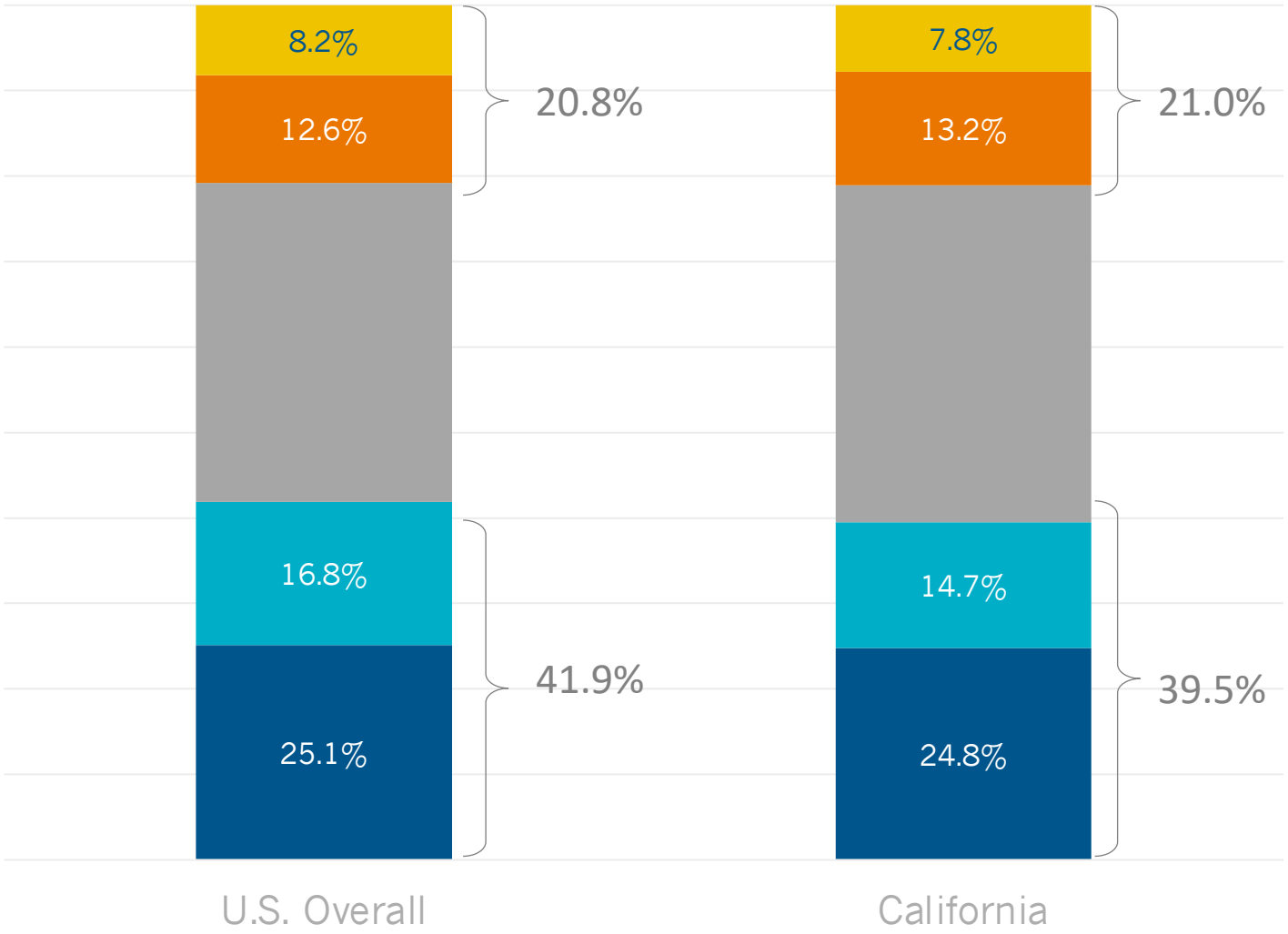
Source: Visit California Research/SMARInsights Weekly Travel Insights Study

AND…CA residents have consistently UNDERESTIMATED their intra-state trips!



Source: Visit California Research/SMARInsights Weekly Travel Insights Study

Safety of Ski/Snowboard Trip

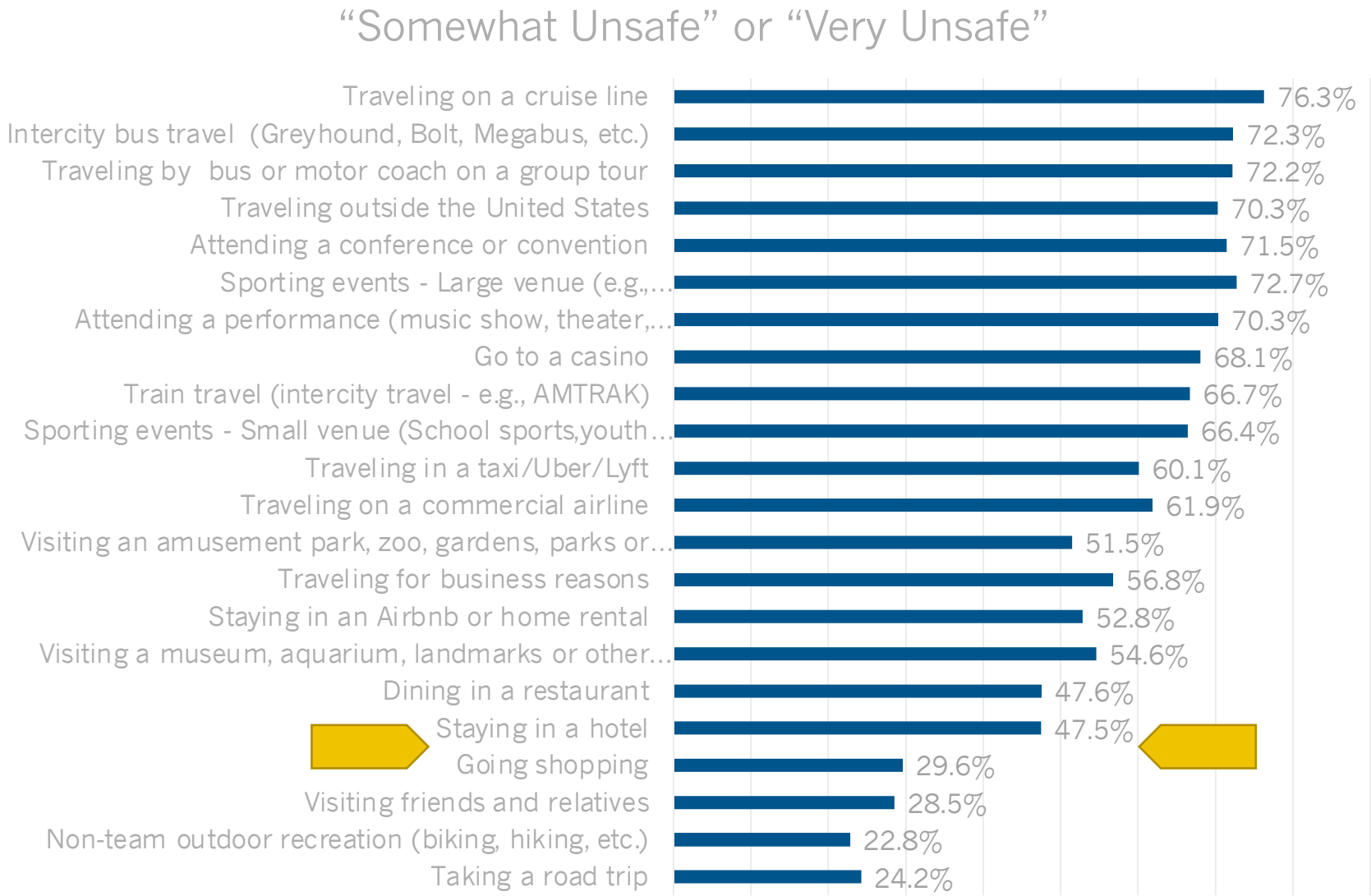


At this moment, how safe would you feel taking a ski/snowboard vacation next season (Winter 2020/2021)?

- Very safe
- Safe
- Neutral
- Unsafe
- Very unsafe

Source: Destination Analysts

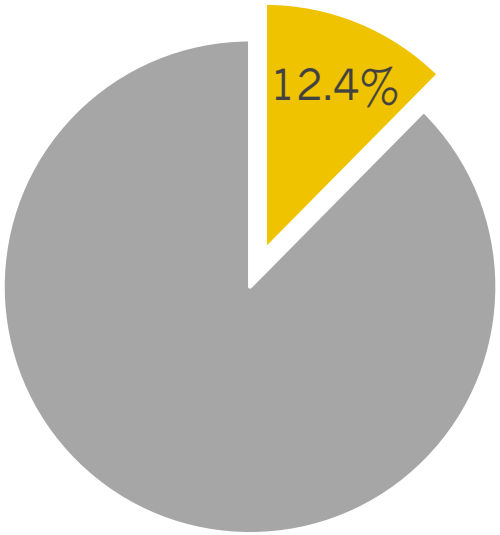
Ski/Snow Safety Perception in Context



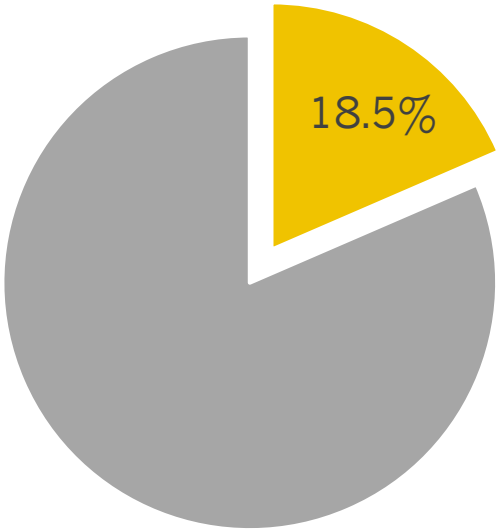
Source: Destination Analysts

Have a Snow Destination you regularly visit?

U.S. Overall

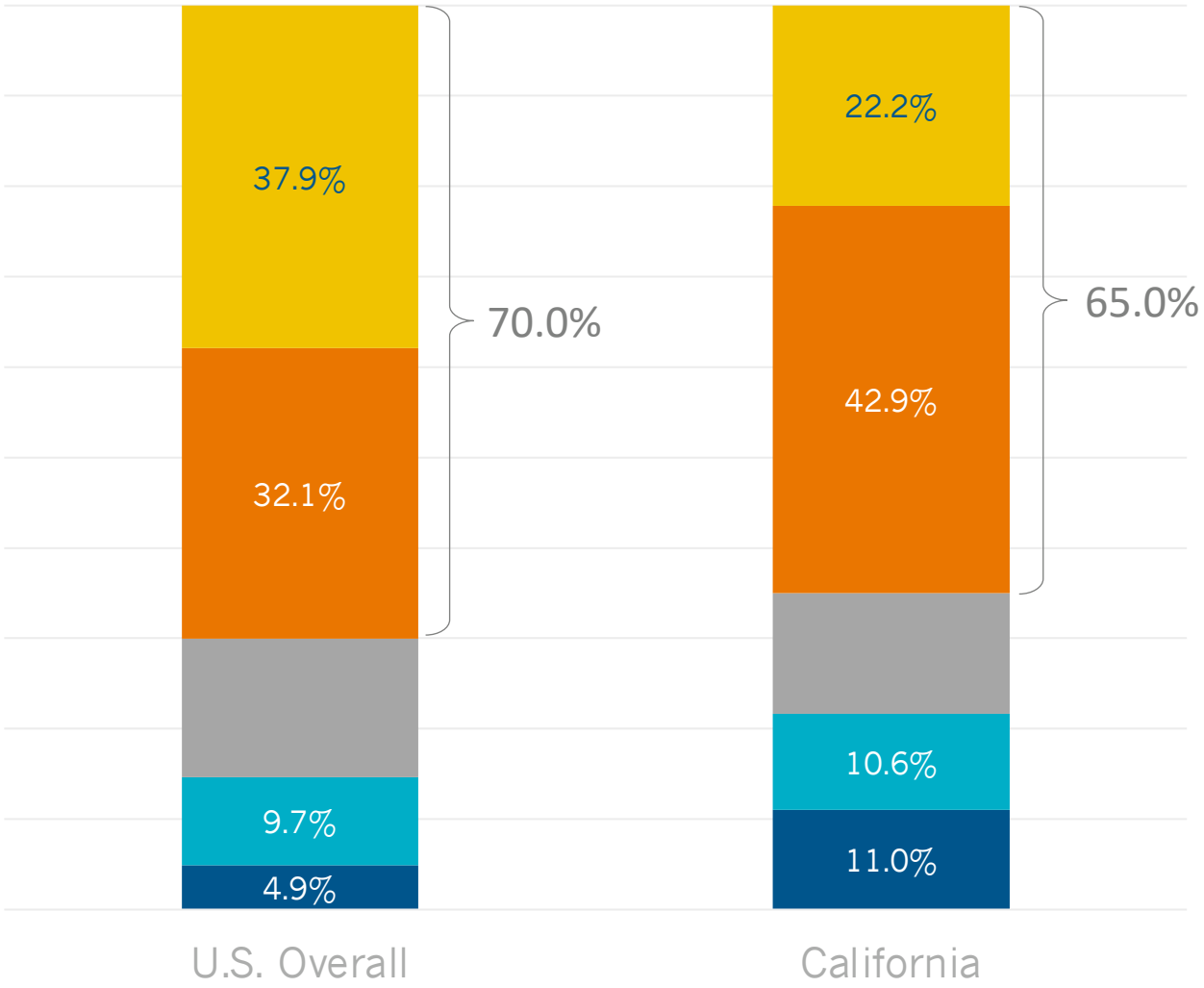


California Residents



Source: Destination Analysts

Likelihood for Snow Trip This Season

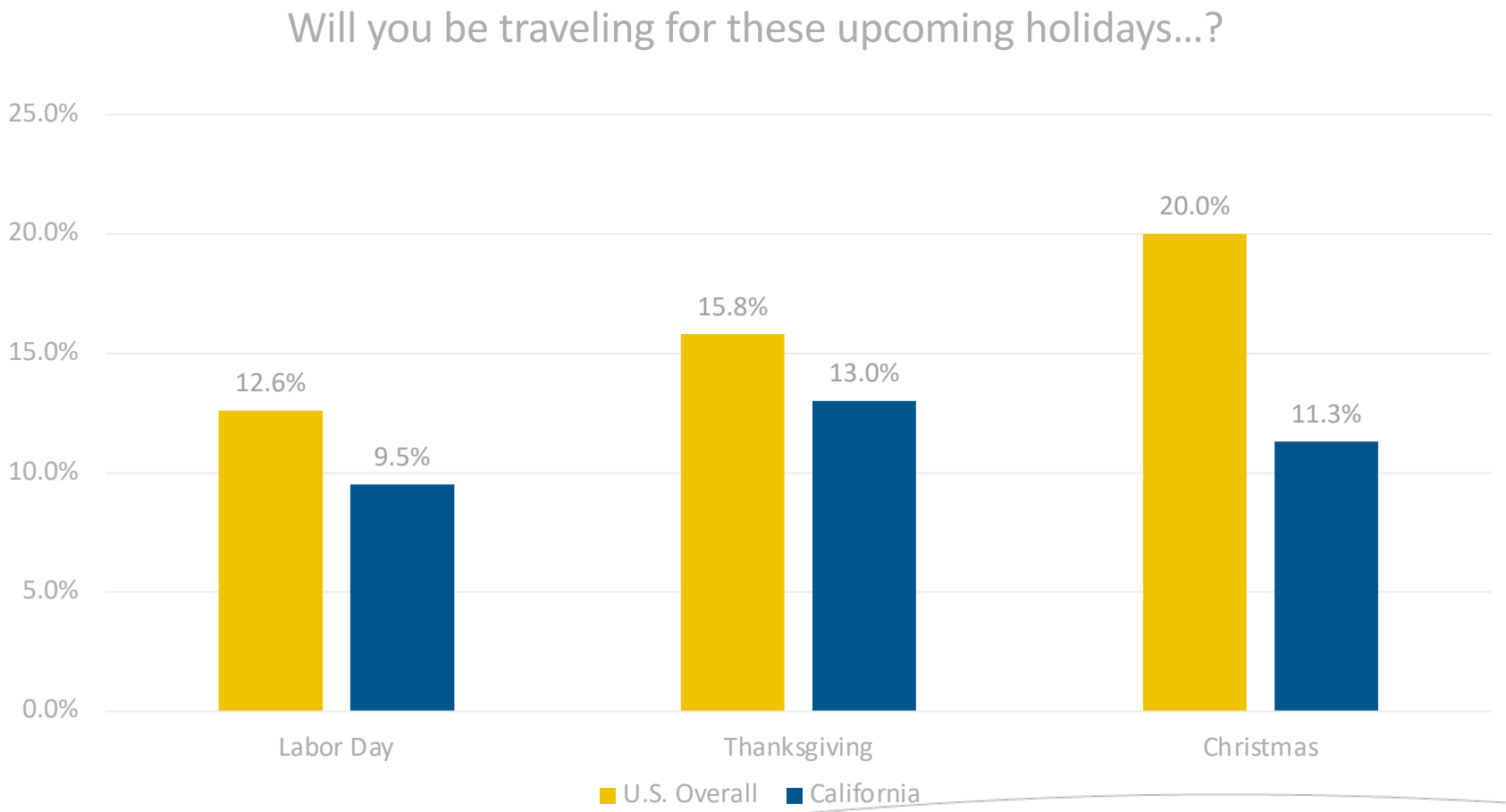


How likely are you to take an overnight ski/snowboard-related trip to that destination next season (Winter 2020/2021)?

- Very likely
- Likely
- Neutral (Neither likely nor unlikely)
- Unlikely
- Very unlikely

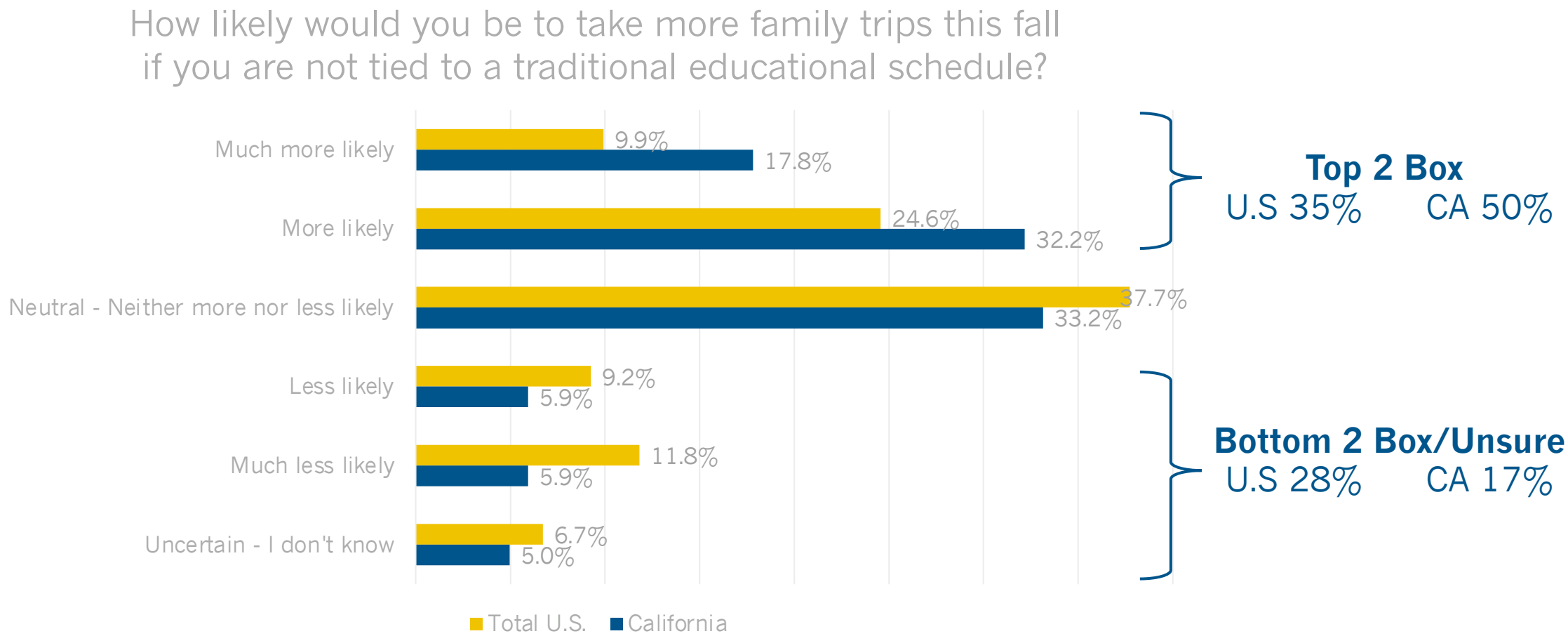
Source: Destination Analysts

Upcoming travel expectations…



Source: Destination Analysts

Virtual learning may present continued opportunity for intra-state trips later into the season



Source: Destination Analysts

Research Resources & Helpful Links

Research Department Contacts:

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Ani Chibukhchyan, Research Analyst, achibukhchyan@visitcalifornia.com

Helpful Links:

Visit California COVID Update

COVID Research Dashboard

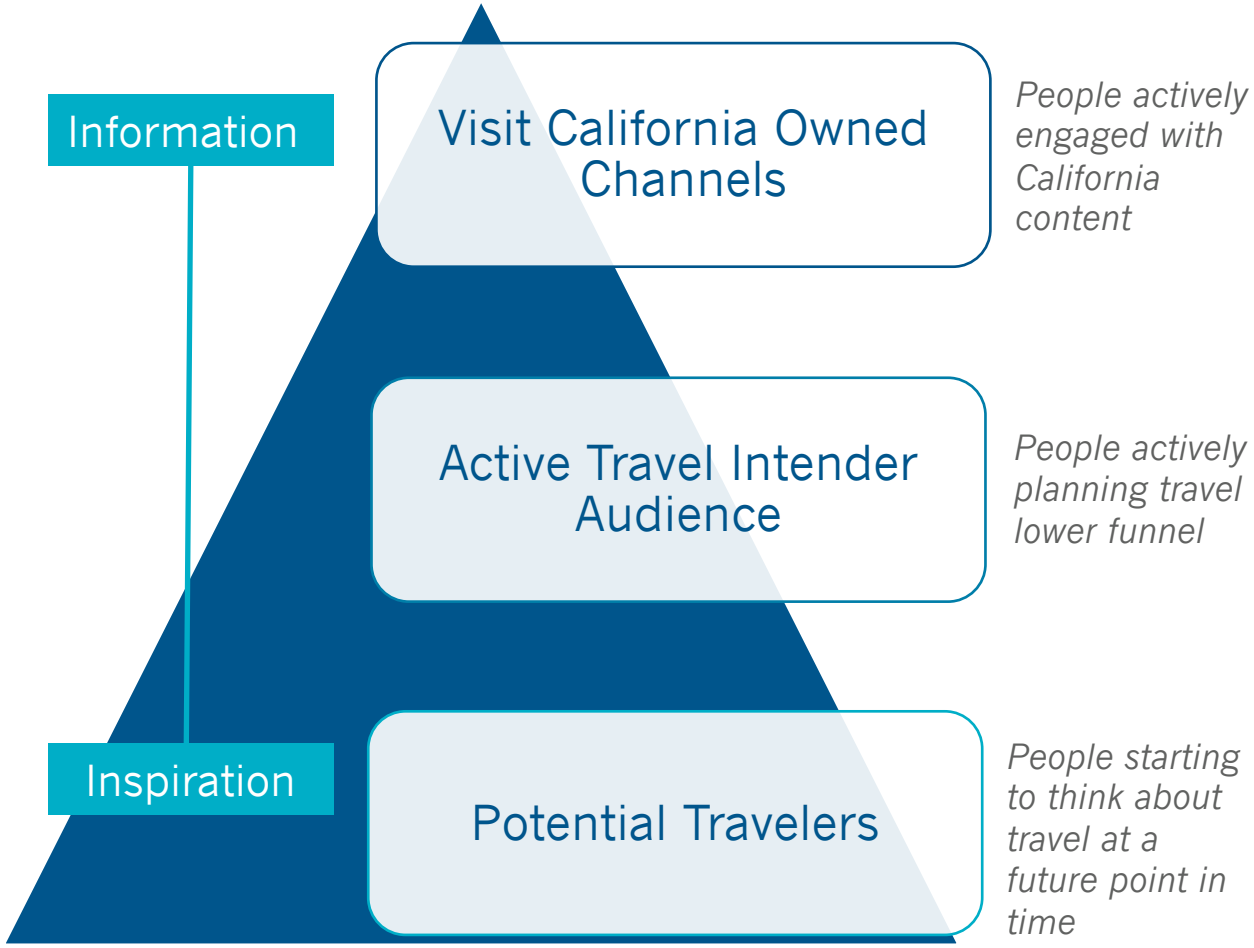
Economic Impact on Travel Industry

Weekly Lodging Report

Visitation & Spend Forecast

Visit California Recovery Marketing Update

Recovery Campaign At-A-Glance



MESSAGING/ASSETS	LAUNCH DATE
• **"See You Soon" Videos**	6/22
• "So You Think You Know"	7/14
• US Travel "Let's Go There, Soon"	9/8
• **SEM (Top Paid Search Terms)**	7/8
• Paid Content Distribution**	8/31
• **"Never Normal"**	
◦ Online TV	9/17
◦ Linear TV/CBA)	9/24
• **"Safe Travels, CA" Safety Videos**	9/29
"Calling All Californians"	
• CAC Industry Co-op (Match)	8/3
• Digital Video	
◦ Trip Advisor/Expedia	9/14
◦ Active Travel Intenders	10/12

**"Know Before You Go" & "So You Think You Know" content

†CAC Industry Co-op Investment: $1.197M

Visit California Safety and RESPECT Campaigns

Responsible Travel

Safety is Cost of Entry

Foster Readiness to Travel

- How to travel safely
- Precautions to take
- Responsible travel
- Create destination "culture" of safety

Prospective Travelers

Inspire Travel → **Spur and Shape Travel** → **Facilitate Travel**

SAFETY
Creative Assets

“Never Normal” PSA

- Californians have always embraced new ideas and ways of living — “you doing you” is our normal and now we’re just doing that in a mask, 6-feet apart, with freshly washed hands

EXPERIENCES / WHAT YOU NEED TO KNOW ABOUT STAYING IN CALIFORNIA HOTELS

What You Need To Know About Staying In California Hotels

Thanks to the lodging industry's focus on safety protocols, you can book your next overnight stay with confidence

Safe Travels in California | Luxury Experiences | Spas & Wellness

Calling All Californians Safety Pivot

- New brand-forward videos emphasizing strict cleaning and sanitization protocols in place to keep people safe and California open

Responsible Travel Code

Responsible Travel Code

- Industry Toolkit helps tourism businesses and destinations to amplify the R.E.S.P.E.C.T message to travelers

Responsible Travel Code

- 81 clips
- 185.6M impressions

The New York Times

abc10

KCRA 3

AFAR

AP

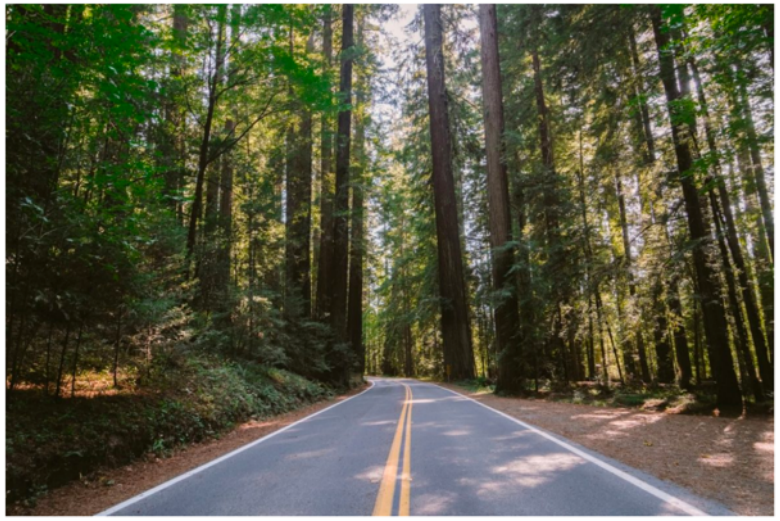
Responsible Travel #RespectCalifornia

BON TRAVELER

TRAVEL WELL. TRAVEL OFTEN.

How To Travel Responsibly And Safely In California This Summer 2020

JUNE 26, 2020



Visit California Social Media

Social Media

- Messaging Ratio:
  - 80% inspirational / 20% safety

- Inspirational messaging platform keeping consumers informed and safe
- Consumer-first messaging told through UGC and stories
- Amplifying hyper local industry campaigns and initiatives

Thank you!