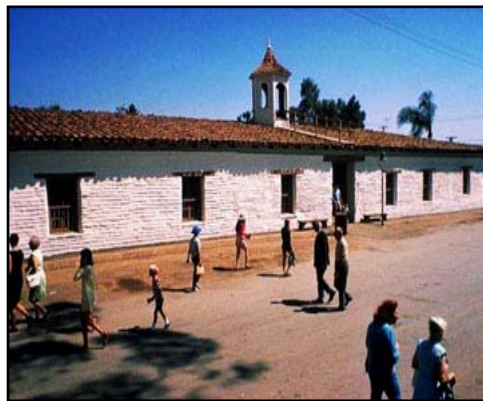


1999 California Heritage Tourism Report

December 2000



California Tourism

**A Joint Marketing Venture of
The California Travel & Tourism Commission
& The Division of Tourism,
California Technology, Trade and Commerce Agency**

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Excellence in Travel Intelligence®

**1999 DKS&A Heritage Tourism Report
California
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1999 DKS&A Heritage Tourism Report California EXECUTIVE SUMMARY

Heritage Travel Definition: A traveler is considered to be a Heritage traveler if he/she participated in at least one of the following activities: Visit National/State Park, Visit Historic Site, Attend Festival/Craft Fair, and/or engage in a Cultural (museum/play/concert) activity.

Visitor Volume

California attracted 62.8 million Heritage travelers in 1999 (visitors that engaged in Heritage activities on their trip), up 12.3% from 1998 when the state hosted 55.9 million Heritage visitors. California's 62.8 million Heritage visitors contributed a total of 153.3 million Person-Days in 1999, up 7.8% from 1998 when Person-Day volume totaled 142.2 million.

- Heritage travelers were primarily California Residents, representing 81.4% of the total in 1999.
- Cultural activities such as going to a museum, play, or concert, were the most popular among Heritage travelers in 1999, with 22.9 million visitors engaging in such activities. Visit National/State Parks was also a popular activity, with 20.9 million Person-Trips, followed by 19.0 million Person-Trips for Visit Historic Site, and 16.9 million Person-Trips for Festivals/Craft Fairs.

Visitor Spending

California Heritage travelers contributed \$17.7 billion to California's economy in 1999, up 12.9% from the 1998 spending level.

- Resident Heritage travelers contributed the majority of these dollars, accounting for 58% of the state's heritage direct spending or \$10.2 billion.
- Spending by those Heritage travelers who Visited National/State Parks, attended Festivals/Craft Fairs, and engaged in Cultural activities increased between 1998 and 1999, while spending by those who Visited Historic Sites dropped.

Visitor Satisfaction and Value Ratings

In 1999, 64% of Heritage visitors were highly Satisfied and 55% reported excellent Value-for-the-Money ratings regarding their trip(s) to California.

- Satisfaction and Value ratings among Resident Heritage travelers increased between 1998 and 1999, while such ratings declined for Non-Resident Heritage travelers.
- Among the activity groups, Satisfaction and Value ratings increased for Cultural, Festivals/Craft Fairs, and Historic Site visitors, but decreased for those who Visited National/State Parks.

1999 DKS&A Heritage Tourism Report California EXECUTIVE SUMMARY

Demographics

The typical California Heritage traveler was 42.7 years of age in 1999, earned an average annual household income of \$61,200, and was a White-Collar professional (57%).

Travel Behavior

- California Heritage travelers visited the state primarily as Couples (33%) and Families (27%) in 1999.
- The highest share of California Heritage travelers visited the state for a Special Event (27%), followed by a Getaway Weekend (22%), Visit Friends and Relatives (21%), General Vacation (19%), and Other Personal reason (12%).
- National/State Park visitors and Historic Site visitors were primarily traveling for General Vacation and Getaway Weekend purposes, while Festival/Craft Fair attendees and Cultural activity participants traveled primarily to Visit Friends and Relatives and attend Special Events.
- Non-Residents participated in an average of 4.0 activities per trip, compared to only 3.5 activities per trip among Residents.
- Over three-quarters (76%) of California Heritage visitors traveled by Auto in 1999. The average Heritage visitor, regardless of transportation mode, traveled an average one-way distance of 410 miles.
- The average California Heritage traveler stayed 2.4 days. Residents stayed for slightly shorter time periods (2.0 days), while Non-Residents stayed considerably longer (4.5 days on average).
- In 1999, almost half (47%) of California Heritage travelers stayed in Paid Hotel/Motel Accommodations, down 2 percentage points from 1998.

Travel Origins

- The majority (81.4%) of California Heritage travelers were Residents of the state in 1999. The top origin states for Non-Resident travel included Arizona (10.6%), Nevada (8.3%), Oregon (5.8%), Texas (5.6%), Florida (5.5%) and Washington (5.5%).
- Top origin DMAs included Los Angeles (31.0%), San Francisco-Oakland-San Jose (16.2%), Sacramento-Stockton-Modesto (10.8%), San Diego (10.3%), and Fresno-Visalia (4.1%).

1999 DKS&A Heritage Tourism Report California ACTIONABLE CONCLUSIONS

This section explores the accountability and marketing implications derived from consumer responses and will assist California tourism marketing professionals to make informed decisions that will impact their marketing and sales activities as related to Heritage tourism within the state.

Market Assessment

California has one of the most uneven Resident to Non-Resident mixes of any destination in the country. In the heritage travel market. Residents accounted for 81.4% of Person-Trips. Resident Heritage Person-Trip and Person-Day volumes rose 15.2% and 11.0%, respectively, resulting in a 12.5% increase in overall Heritage Person-Trip volume. Considering the magnitude of the increase in Resident Heritage travel from 1998 to 1999, it is clear that California Heritage marketers should continue to devote advertising resources toward attracting Residents. Conversely, given the disparity between Resident and Non-Resident visitation volumes, marketers must explore new ways to attract Non-Residents.

In each of California's Heritage activity groups, Person-Trip volume increased dramatically between 1998 and 1999, with a 20.8% increase in festival/craft fair attendance, a 13.2% increase among those who visited national/state parks, a 9.5% increase among those who engaged in cultural activities, and a 3.5% increase among those who visited historic sites. Person-Day volume increased in the top three activities, but decreased by -3.8% among those who visited historic sites.

California Heritage travelers contributed a total of \$17.7 billion to the state's economy in 1999 up 12.9% from 1998. Increases in direct spending were evident in all segments except in California's Top Origin markets of AZ, TX, and NV and among those who Visited Historic Sites. With California's rich historical resources and destinations, California marketers should further investigate the reasons for the decline in Historic Site visitation in terms of both Person-Day volume and Direct Spending.

Satisfaction and Value ratings among California's Heritage travelers rose slightly from 1998 to 1999. Among Resident travelers, however, while Satisfaction ratings increased slightly, Value ratings dropped. Satisfaction and Value ratings drive consumer loyalty, repeat visitation, destination selection, length of stay, and expenditure. Since Satisfaction is directly tied to service quality and product quality, and a lack of one or both meeting customer expectations results in low ratings. Value ratings are defined as what a person receives in exchange for the price paid. Low Satisfaction and Value ratings may indicate:

- 1) problems with a particular product mix, services or prices, and
- 2) failure to address these issues could result in less consumer loyalty, less repeat business, destination or hotel brand switching, shorter stays, and fewer travel related dollars spent in California.

Overall, Heritage travel volume, spending and satisfaction and value ratings rose over the past year. There were, however, a couple segments that experienced declines in one or more of these key measures that should be addressed by California researchers and marketers.

Targeting

In 1999, the typical California Heritage visitor was slightly younger and wealthier than in 1998. As in the previous year, California Heritage visitors traveled primarily as Couples, Families and Adults Traveling Alone. There were, however, some significant differences in party composition between the various California Heritage segments and activity groups, as well as significant changes within individual segments and activity groups from 1998 to 1999. California marketers should pay close attention to these distinct visitor segments and should direct their creative marketing efforts accordingly.

Positioning

California's Resident and Non-Resident Heritage travelers came to the state for quite different reasons, with Residents traveling more for Getaway Weekends, Special Events and Other Personal reasons, and Non-Residents traveling more for General Vacation and to Visit Friends and Relatives. Likewise, differences in purpose of stay between the various Heritage activity groups were evident, with National/State Park and Historic Site visitors coming primarily for Getaway Weekends and General Vacations, while Cultural activity participants and Festival/Craft Fair attendees came more so for a Special Event or to Visit Friends and Relatives.

As with the variances in party composition among the Heritage segments and activity groups, these differences in travel purposes demonstrate the importance of niche marketing efforts in an attempt to maximize Heritage tourism to and within the state.

Despite the fact that almost half (46.8%) of all California Heritage travelers stayed in Paid Hotel/Motel accommodations in 1999, these stays by Resident and Non-Resident Heritage travelers were down from 1998. Conversely, stays in Non-Paid Accommodations were up in every Heritage travel segment and activity group. It would be expected that increases in stays in Non-Paid Accommodations would be the result of increased VFR travel. Surprisingly, VFR travel decreased across the board. Instead, Special Event travel increased among all groups. Increased stays in Non-Paid Accommodations in the face of increased special event travel, represents a considerable marketing opportunity. California Heritage marketers should explore the possibility of special package promotions involving hotel discounts with special event ticket purchases in order to increase travel dollars spent at the destination through increased Paid Accommodation stays.

Day-trip travel was up across most of the Heritage travel segments from 1998 to 1999, with the share of Day-trip travel by both Residents and Non-Residents up 4 percentage points each. California's product mix lends itself to a longer length of stay than it currently attains. Effective cross-selling will result in longer, more active stays. Tourism revenues are accumulated incrementally, and attention must be paid to increasing the average length of stay, even if just by a few hours. A slight increase in length of stay can result in a large increase in travel expenditures, as well as increased activity participation.

Communicating

Similar to the marketing axiom “Fish where the Fish are”, California needs to advertise and promote its strengths to the identified higher traffic States and DMAs. This basically consists of advertising within the state itself, since 81.4% of Heritage travelers are Residents. Los Angeles was the top feeder market for Heritage tourism, providing 31.0% in 1999.

California Heritage marketers are encouraged to direct efforts at maintaining or increasing heavy resident travel, while increasing travel by Non-Residents.

1999 DKS&A Heritage Tourism Report

California

OVERVIEW

BACKGROUND

D. K. Shifflet & Associates (DKS&A) was commissioned by California Tourism to provide a comprehensive travel analysis of California's Heritage travel market. This report examines key elements of California's 1999 and 1998 Heritage tourism marketplace, which includes volume, market share, and direct spending estimates. In addition, the visitor profile report highlights key demographic and travel behavior characteristics of California's Heritage travelers and provides comparisons to the state's largest origin markets in aggregate. The report also examines sub-segments of California's Heritage market, including profiles of travelers who visited the state's national and state parks, attended festivals and/or craft fairs, visited historic sites, and engaged in cultural activities such as going to museums, plays and concerts within the state. Results of this report will help California's tourism marketers plan strategically for the future by providing actionable information to guide heritage marketing and advertising programs.

OBJECTIVES

- Determine the market size and growth rates of California's heritage travel market for years 1999 and 1998.
- Estimate the Direct Spending of heritage travel to California for years 1999 and 1998.
- Determine the perceptions of heritage travelers' experience in the California marketplace in terms of Overall Satisfaction and Value-for-the-Money.
- Better understand the dynamics (e.g., demographics and travel patterns) of California's heritage travel marketplace and compare to activity and geographic sub segments.
- Identify California's top feeder markets for heritage travel.
- Highlight key changes in California's heritage travel market from 1998 to 1999.

TIME PERIOD

Travel Volume and Direct Spending Estimates are provided for years 1999 and 1998. Figures in the Visitor Profile report cover travel for the single travel year 1999 with a comparison to 1998 travel estimates.

METHODOLOGY

All of the information contained in this report is derived from D.K. Shifflet and Associates' **DIRECTIONS**® tracking system. Mail questionnaires are collected through a mail panel. Each mailing is stratified to demographically match U.S. Census data. The returned sample is balanced by age, origin region, household income, household size, and gender to be representative of the U.S. population:

- Each mailing goes to 45,000 different households per month, 12 months a year
- About 60% of the households return the questionnaire
- Each household reports their last three months of travel and lodging
- Approximately 40% of households have traveled in the past three months

1999 DKS&A Heritage Tourism Report California OVERVIEW

TRAVEL VOLUME OVERVIEW

DKS&A can present the results of our *DIRECTIONS*[®] Performance/IndexSM study of U.S. travelers at many levels. Each level of reporting is used for different purposes.

The smallest unit is the **Decision-Maker**, commonly the target of your marketing efforts. The largest measure of visitor volume is **Trip Expenditures** and answers the question “How much did they spend?” It is common to discuss a specific destination's share of total travel expenditures.

To answer the question of “How many people came and bought your product (destination)?”, we report the number of people who visited and how long they stayed i.e., **Person-Days**. **Person-Days** is a cumulative measure of total volume of travel generated by travelers, and is therefore the appropriate measure to use when discussing a destination's volume and relative market share.

In contrast, the number of **Person-Trips** taken to a destination tells you the market size or just how many people came to your destination, but not how long they stayed. For example, this measure tells you how many people went on getaway weekends. It does not tell you how long they stayed, just that they were on a getaway weekend.

People often travel together with family, friends or with other groups. The number of **Travel Parties** tells you how many distinct groups of travelers came to your destination.

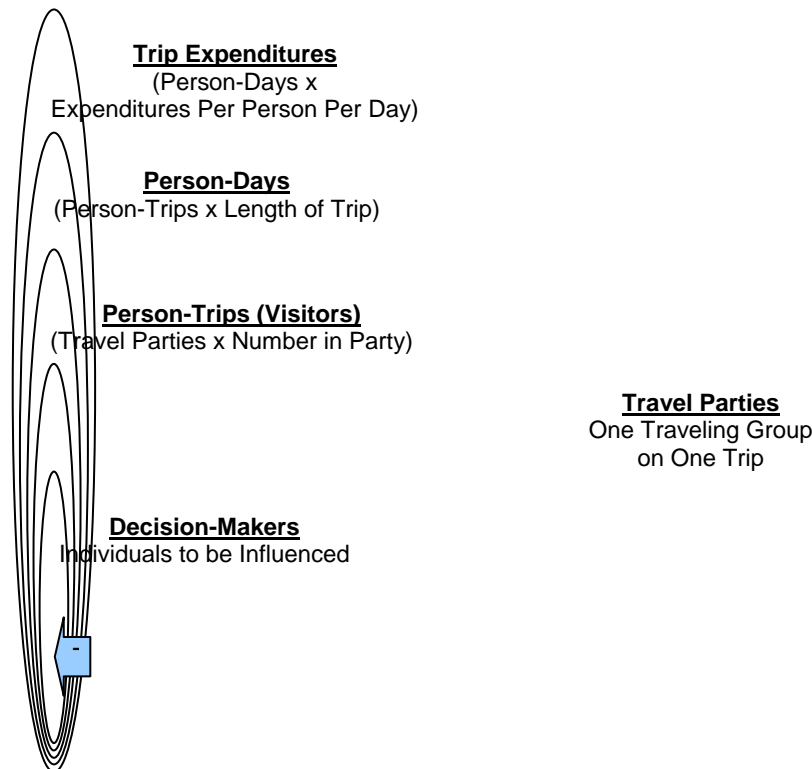


Figure 1.0 – Levels of Measurement Used by DKS&A

1999 DKS&A Heritage Tourism Report

California

OVERVIEW

TRAVEL VOLUME METHODOLOGY (cont.)

Our smallest group, the **Decision-Makers**, are the target for most marketing campaigns. We know that this group does not make decisions in a vacuum and that many travel decisions are made by more than one person. However, in our study, this person is the individual who reports the trip(s).

The standard estimates we provide to destination marketing organizations in our syndicated reports are **Person-Trips**, **Person-Days** and **Trip Expenditures**. We provide these three measures because these are the most useful measures for assessing destination performance.

The two lowest levels, **Travel Parties** and **Decision-Makers**, are used when conducting Return On Investment (ROI) analysis and for targeting your messages, products and packages to influence traveler decisions. Each level of information is described below.

Levels Of Measurement

Decision-Makers: This is the most targeted level of measurement and should be used to determine the available pool of individuals whose decisions may be influenced.

(Mrs. Smith = 1 decision maker)

Travel Parties: This is the smallest unit used for measuring a travel experience, and is also referred to as a "stay" or "visit".

(Mr. and Mrs. Smith's 5-day vacation in California = 1 travel party or 1 visit)

Person-Trips: This is the next level used for measuring a travel experience, and is frequently referred to as a "visitor".

(Mr. and Mrs. Smith's 5 day vacation in California = 2 person-trips or 2 visitors)

Person-Days: This is the next level of measuring travel experiences and is the most appropriate when measuring share of travel for destinations and attractions. It takes into account the length of stay of each visitor, shifting the importance from bodies to days in the market. Since attractions, restaurant, and other entertainment venues are vying for a visitor's time, the longer the visitor stays, the more time an attraction has to work with. The goal of destination marketing organizations is to maximize both the number of visitors and the length of stay of each visitor. The Person-Days are calculated by multiplying the number of person-trips X the length of stay in the market.

(Mr. and Mrs. Smith's 5 day vacation in California = 10 person-days [2 person-trips X 5 days]).

Trip Expenditures: This is the largest unit of measurement and is used to assess in-market spending and ROI of marketing efforts. It is a measurement of the dollars spent by a travel party during their stay. By targeting the types of travelers who spend the most money while they travel, a destination marketing organization can increase the overall economic benefit of tourism in their community (or state). The trip expenditures are the product of multiplying the Person-Days by the average expenditures per person per day.

(If Mr. and Mrs. Smith spent \$100 per person per day on their 5 day vacation in California, their trip expenditures would be \$1,000 [10 person-days X \$100 per person per day]).

1999 DKS&A Heritage Tourism Report California OVERVIEW

REPORT FORMAT

The report analyzes four key areas of California's heritage travel marketplace, which are outlined below:

- *Market Assessment*
Answers the questions, "How many heritage visitors did California attract?", "What was the direct spending contribution of heritage travel to California?" and "What were travelers' perceptions of their heritage travel experience in California?"
- *Targeting*
Answers the question, "What are the key demographic characteristics of California's heritage visitors and how do these compare to activity and geographic sub-segments?"
- *Product Positioning*
Answers the question, "What are the key travel patterns of California's heritage visitors relative to activity and geographic sub-segments?"
- *Communicating*
Answers the question, "What are the top origin markets of California's heritage visitors and how do these compare to activity and geographic sub-segments?"

1999 DKS&A Heritage Tourism Report

California

DEFINITION OF TERMS

Consistent with the World Travel Organization, DKS&A defines travel as any trip with a night away from home or a Day-Trip which is 50 or more miles one-way from home. For this report, all data represents HERITAGE travel only.

Heritage Travel Definition: A traveler is considered to be a Heritage traveler if he/she participated in at least one of the following activities: Visit National/State Park, Visit Historic Site, Attend Festival/Craft Fair, and/or engage in a Cultural (museum/play/concert) activity.

For the *Heritage* Visitor Profile, the following travel segments are analyzed. Specifically, each point is defined as follows:

California Heritage Travel

Total	Represents total Heritage travel to the state of California
Rsdnt	Represents Heritage travel by residents of the state of California
N-Res	Represents Heritage travel by travelers residing outside the state of California
Origin AZ, TX, NV	Represents Heritage travel by residents of the states of Arizona, Texas, and Nevada to the state of California

California Travel

Visit Parks	Represents travelers to the state of California who participated in the activity "Visit National/State Parks"
Festivals Crft Fair	Represents travelers to the state of California who participated in the activity "Festival/Craft Fair"
Historic Site	Represents travelers to the state of California who participated in the activity "Visit Historic Site"
Cultural Museum	Represents travelers to the state of California who participated in the activity "Cultural (museum, play, concert)"

DATA TABLE SYMBOL DEFINITIONS

* Represents a percentage less than 0.5%

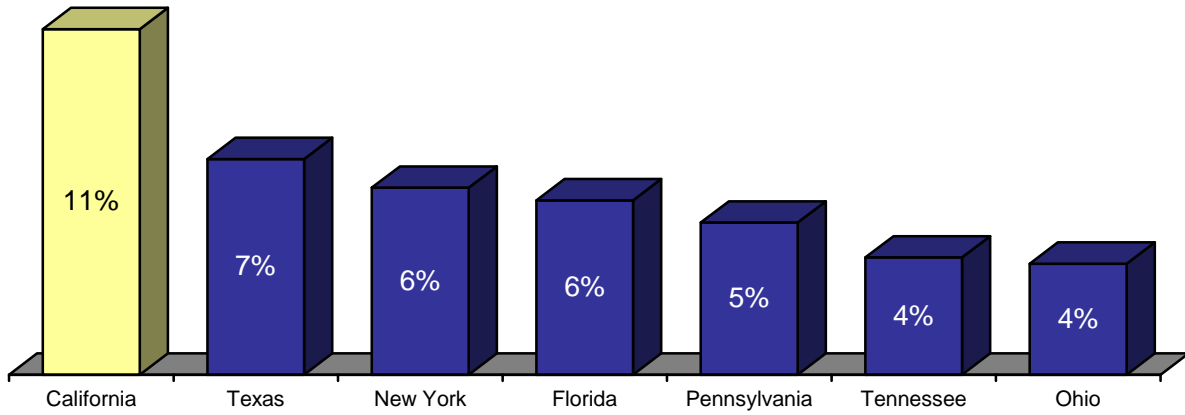
California

Heritage Visitor Profile Report

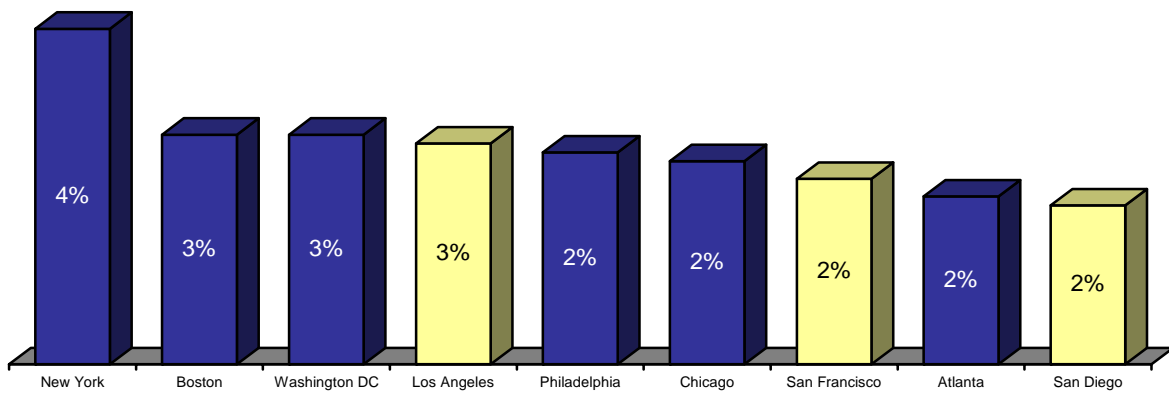
Market Assessment

California Heritage Tourism

**1999 Share of Heritage Travel
Top States (in Person-Trips)**



**1999 Share of Heritage Travel
Top DMAs (in Person-Trips)**

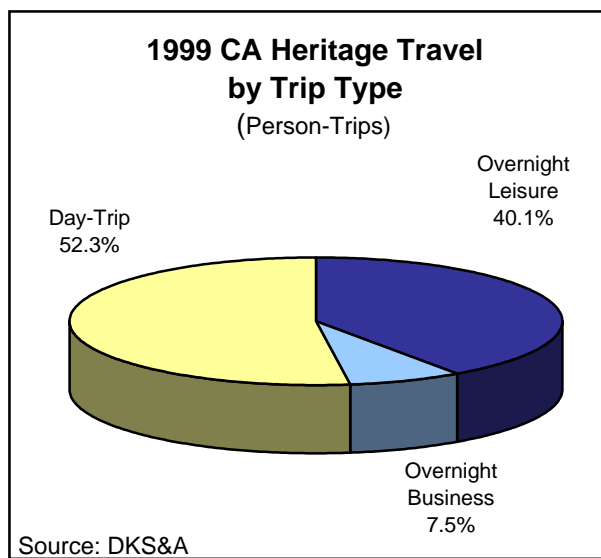


California Heritage Tourism

As mentioned previously in this report, a traveler to California is considered to be a Heritage traveler if he or she engaged in one or more of the following activities while on their trip: Visit Historic Site, Visit National/State Parks, Attend Festivals/Craft Fairs, and Engage in Cultural Activities such as going to a museum, play, or concert. Because a traveler may have engaged in more than one of these activities, volume estimates by activity cannot be added together to arrive at a total; these activities are not mutually exclusive.

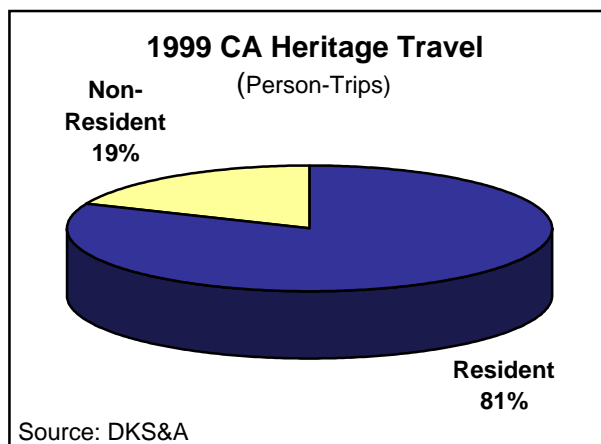
California Heritage Person-Trip Volume Estimates – **Heritage Travel is Increasing in California**

- In 1999, California attracted 62.8 million Heritage visitors (Person-trips), up 12.3% from 1998 when the state hosted 55.9 million Heritage Person-Trips. Heritage travel is an important tourist market for California, comprising almost one-quarter (23 %) of total Person-Trips to the state in 1999.
- Over half (52.3%) of Heritage trips were Day-Trips, followed by 40.1% Overnight Leisure trips. Overnight Business visitors also engaged in Heritage activities in 1999, contributing 7.5% of total Heritage Person-Trips.



Resident vs. Non-Resident Heritage Person-Trip Share – **The Majority of California’s Heritage Travelers are Residents of the State**

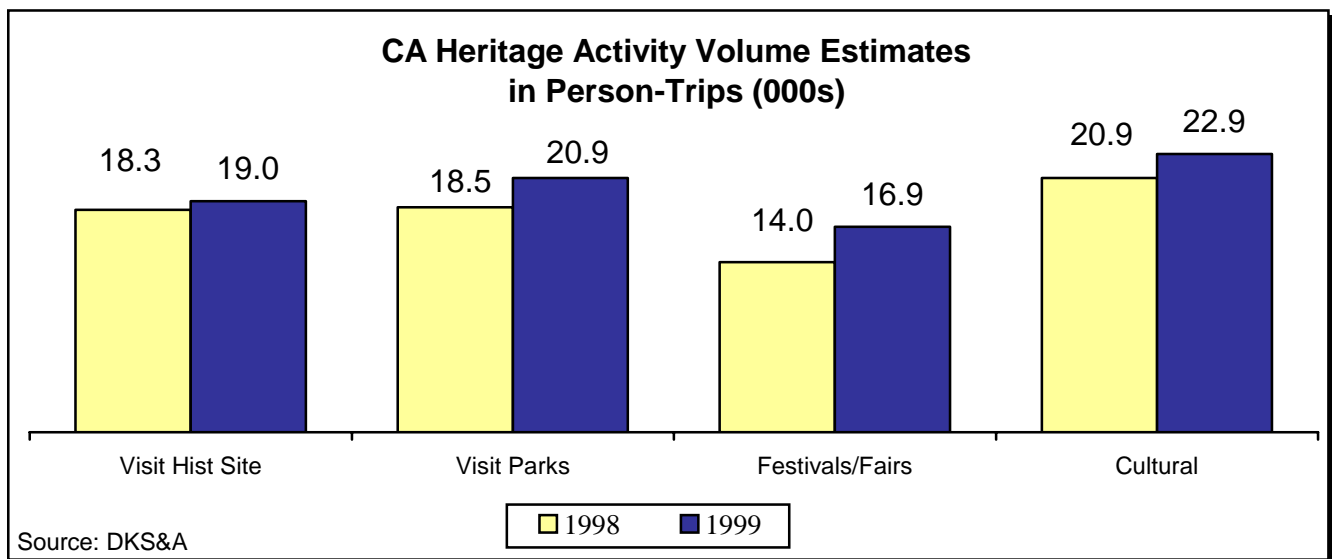
- In 1999, 81.4% of California’s Heritage travelers came from within the state. This share was up 2 percentage points from 1998, when 79.6% of the state’s Heritage travelers were residents.



California Heritage Tourism

California Heritage Activity Person-Trips Volume Estimates – Participation Increased in Each of the Heritage Activities from 1998 to 1999

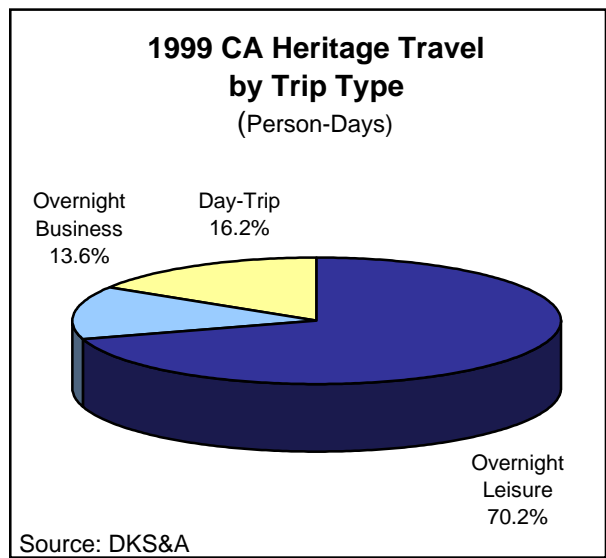
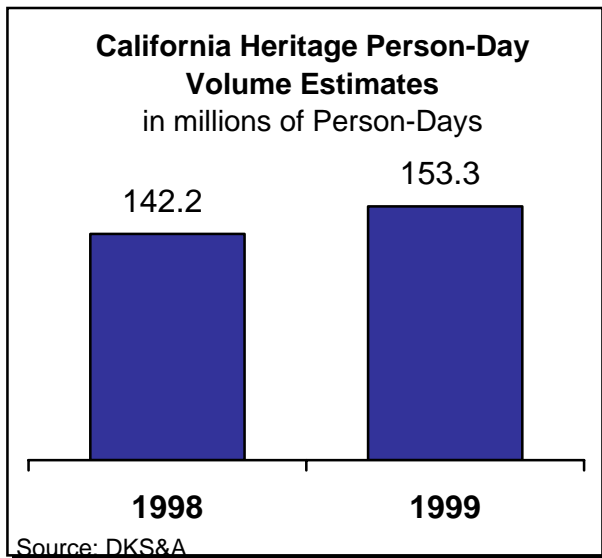
- Travelers that engaged in Cultural activities, such as visiting a museum or going to see a play or concert, contributed the highest number of Person-Trips among the Heritage activity groups, providing 22.9 million visitors in 1999. Cultural activity participation increased 9.6% from 1998.
- In fact, participation levels increased in each of the Heritage activity groups, with Historic Site Visitation up 3.8%, National/State Park visitation up 13.0%, and Festival/Craft Fair attendance up a dramatic 20.7% from 1998 to 1999.



California Heritage Tourism

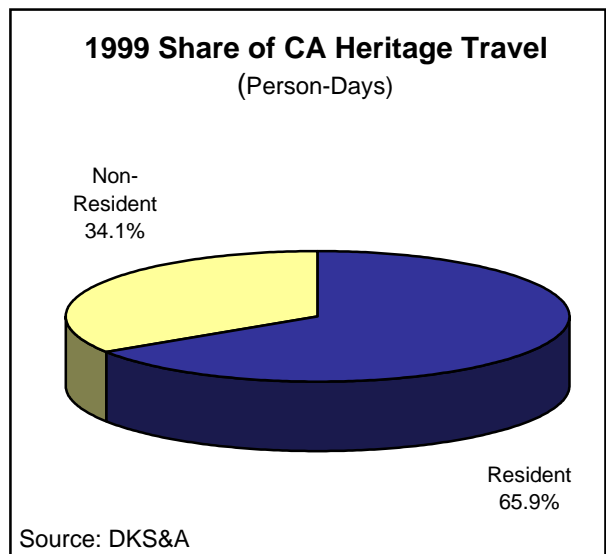
California Heritage Person-Day Volume Estimates – **Total Days Spent in the Market Increased**

- In 1999, California’s 62.8 million Heritage visitors contributed 153.3 million Person-Days, up 7.8% from 1998 when the state hosted 142.2 million Person-Days.
- Almost three quarters (70.2%) of CA Heritage Person-Days were attributable to Overnight Leisure travelers. Overnight Business travelers comprised 13.2% of total Heritage Person-Days.



CA Resident vs. Non-Resident Heritage Person-Day Share – **Residents Contributed the Highest Share of Heritage Person-Days, but the Share was lower than that of Resident Person-Trips**

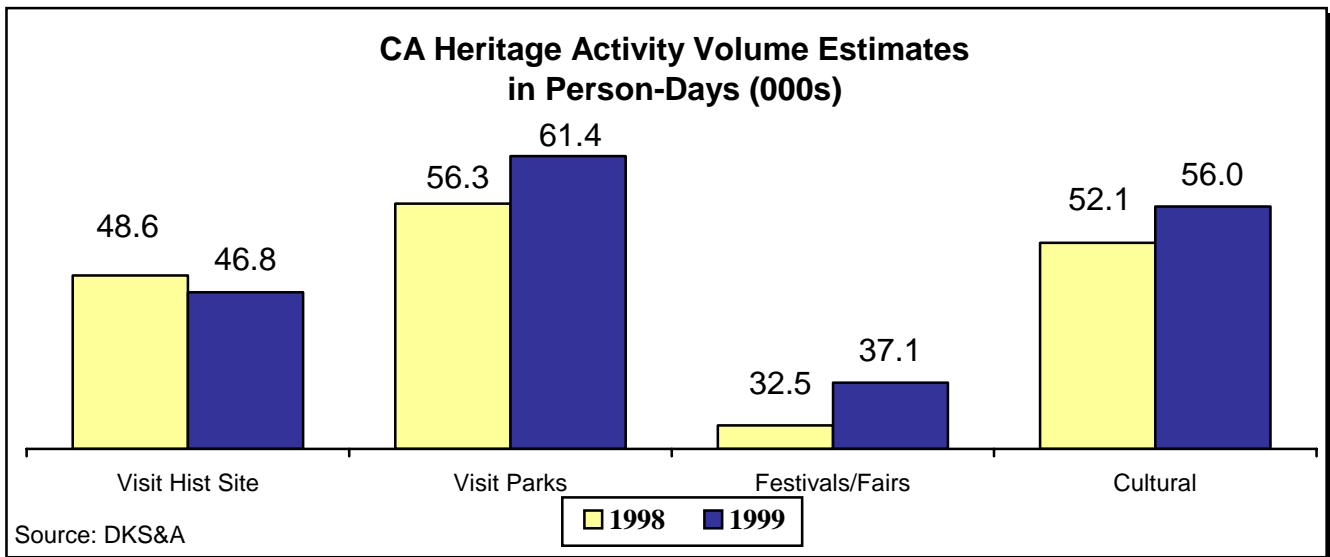
- California Resident Heritage travelers contributed the highest share of person-days in both 1998 and 1999, with 64.2% and 65.9%, respectively.
- The share of Resident Person-Days is lower than the share of Resident Person-Trips due to longer Non-Resident stays in the state.



California Heritage Tourism

California Heritage Activity Person-Day Volume Estimates – National/State Park Visitors Contributed the Highest Amount of Person-Days among the Heritage Activity Groups

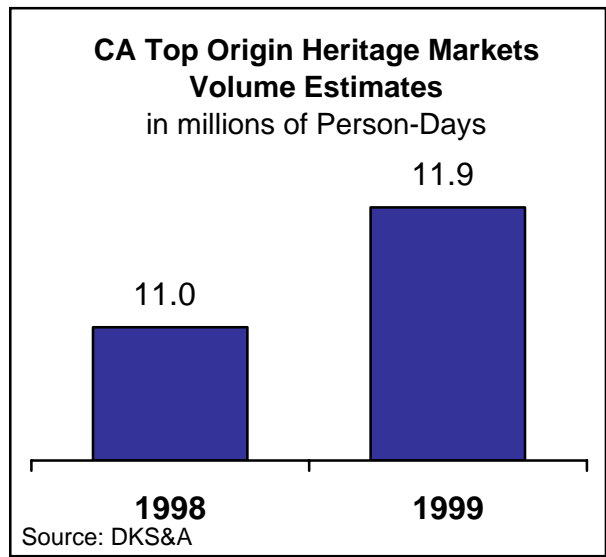
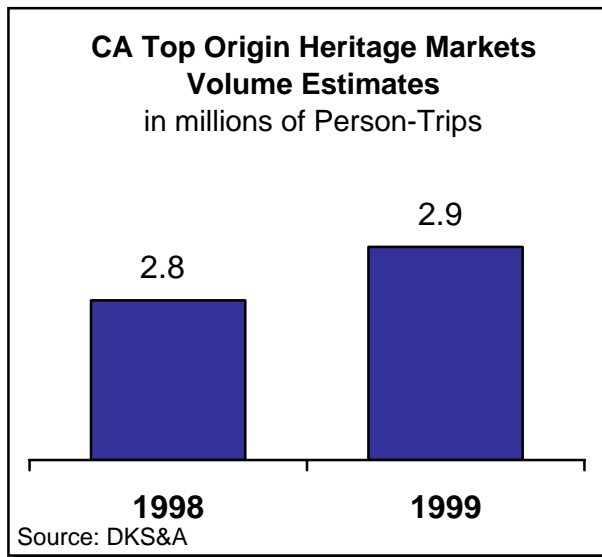
- Visiting National/State Parks was the most popular activity among CA Heritage travelers, drawing 61.4 million Person-Days in 1999. Park visitation increased 9.1% from 1998.
- Participation in Cultural activities and Festivals/Craft Fairs also increased, up 7.5% and 14.2%, respectively.
- Conversely, Historic Site visitation decreased, down 3.7% from 1998 when the state hosted 48.6 million Person-Days. It should be noted that because Historic site visitation increased in terms of Person-Trips, but decreased in terms of Person-Days, there were more visitors participating, but those visitors stayed for shorter periods of time.



California Heritage Tourism

Heritage Top Origin Markets to California – **Arizona, Texas and Nevada Together Provided California with 2.9 Million Heritage Person-Trips and 11.9 Million Heritage Person-Days**

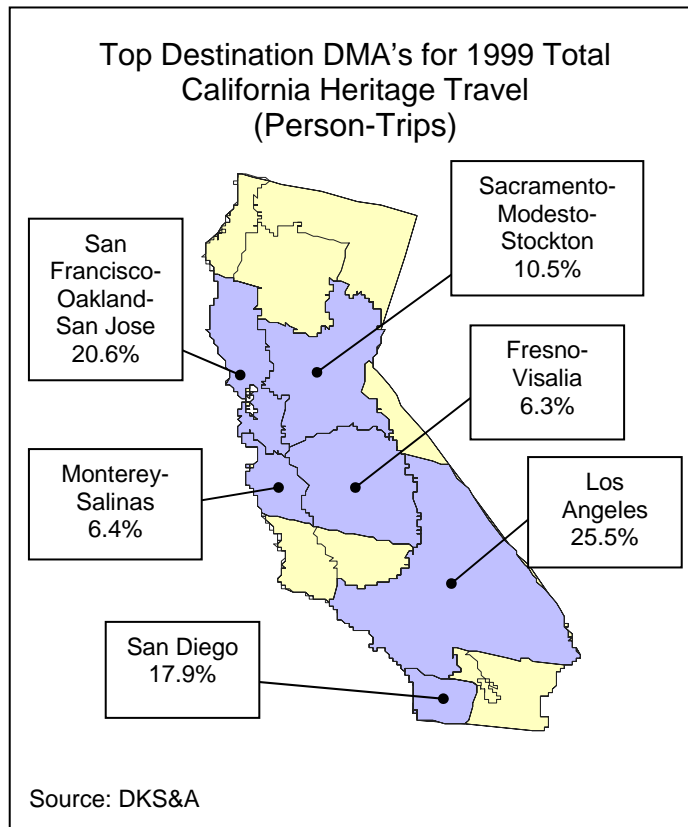
- Arizona, Texas and Nevada provided the highest share of Heritage visitors to California among all other states in 1999. Together, these states represented 4.6% of California Heritage Person-Trips, down slightly from a 5.1% share in 1998.
- Share of Person-Day travel was higher than share of Person-Trip travel among Heritage travelers from these top origin markets, representing 7.8% in 1999 and 7.7% in 1998 of all California Heritage travel Person-Days.



California Heritage Tourism

Top California Heritage Destination Markets – Heritage Travel was Most Prevalent in the Los Angeles, San Francisco and San Diego DMAs

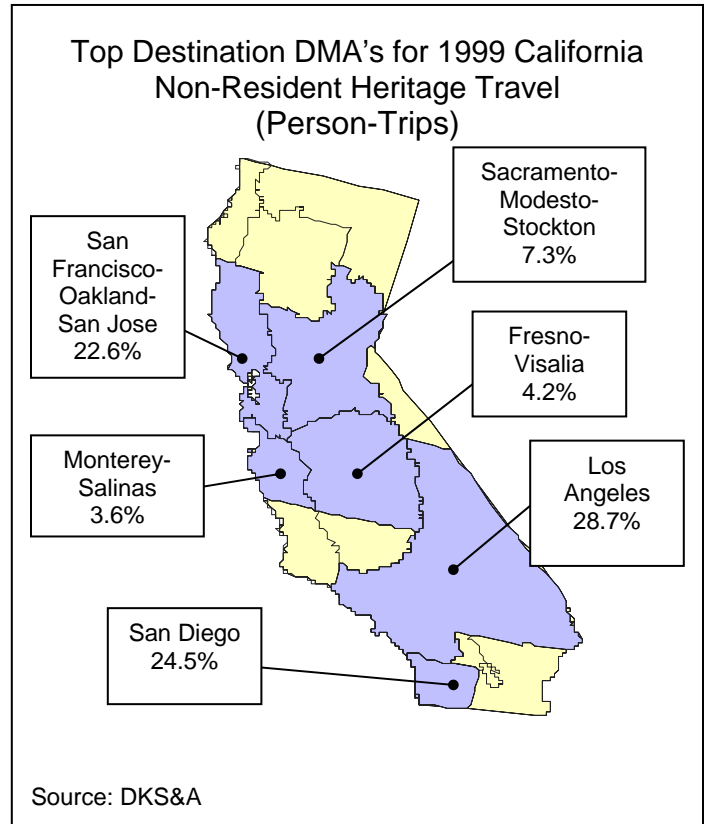
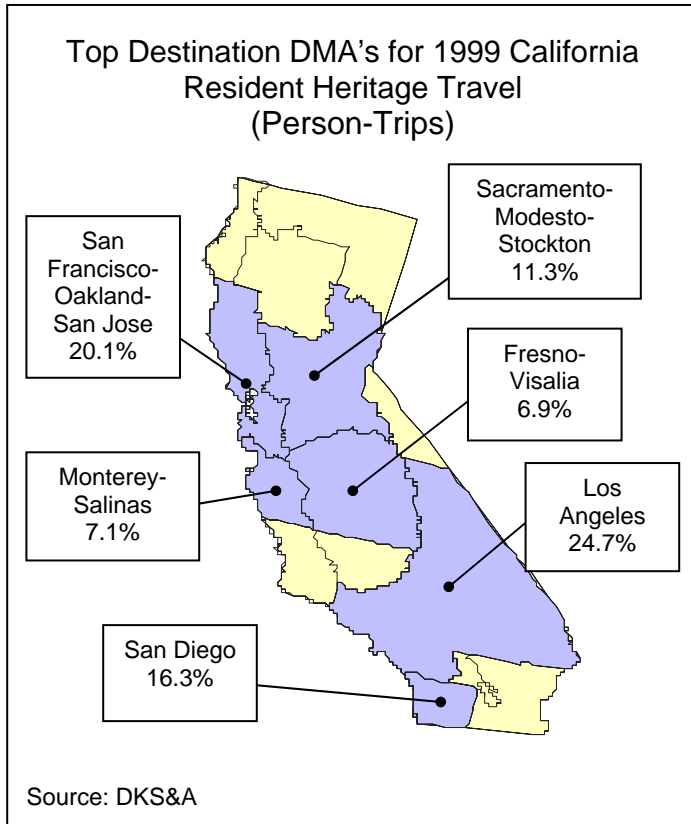
- Over a quarter (25.5%) of California Heritage travelers visited the Los Angeles DMA. Just over an additional fifth (20.6%) visited the San Francisco-Oakland-San Jose DMA. The San Diego, Sacramento-Modesto-Stockton, Monterey-Salinas, and Fresno-Visalia DMAs were also top destination markets for Heritage travelers, receiving a combined 41.1% of California Heritage travel in 1999.
- Since 1998, Heritage travel share decreased in the Los Angeles and San Francisco-Oakland-San Jose DMAs, down 2 percentage points each. Heritage travel to the San Diego DMA increased, up 3 percentage points from the previous year. This increase was primarily the result of an increase in share among those who Visited National/State Parks (up 10 percentage points) and those who engaged in Cultural activities (up 4 percentage points).



California Heritage Tourism

Top Resident and Non-Resident California Heritage Destination Markets – **Non-Residents Favored San Diego as a Destination for Heritage Activities**

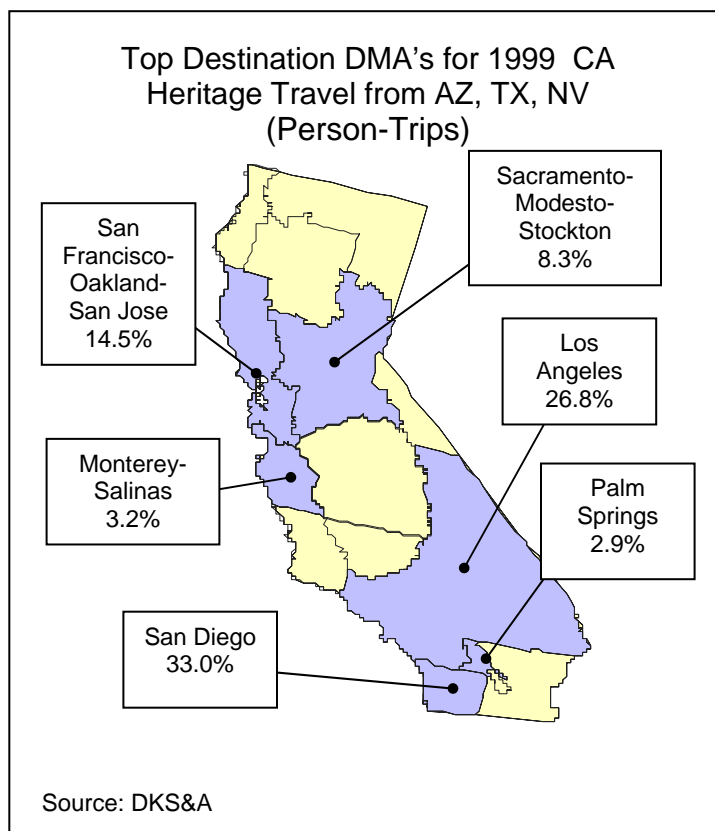
- California Resident and Non-Resident Heritage travelers had relatively similar destination shares in the top destination DMAs. The exception was with travel to the San Diego DMA, where a quarter (24.5%) of Non-Residents visited compared to only 16.3% of Residents.



California Heritage Tourism

Top California Heritage Destination Markets Among the Top Origin Markets – **Heritage Travel Distribution Differed from Overall Heritage Travel Patterns**

- Interestingly, Heritage travelers from California's Top Origin markets of Arizona, Texas, and Nevada showed a quite different distribution of travel than Heritage travelers.
- Significantly higher shares from Top Origin Markets as opposed to total Heritage travelers traveled to the San Diego DMA (33.0% compared to 18%). Similarly, a lower share traveled to the San Francisco-Oakland-San Jose DMA (14.5% compared to 20.6%).

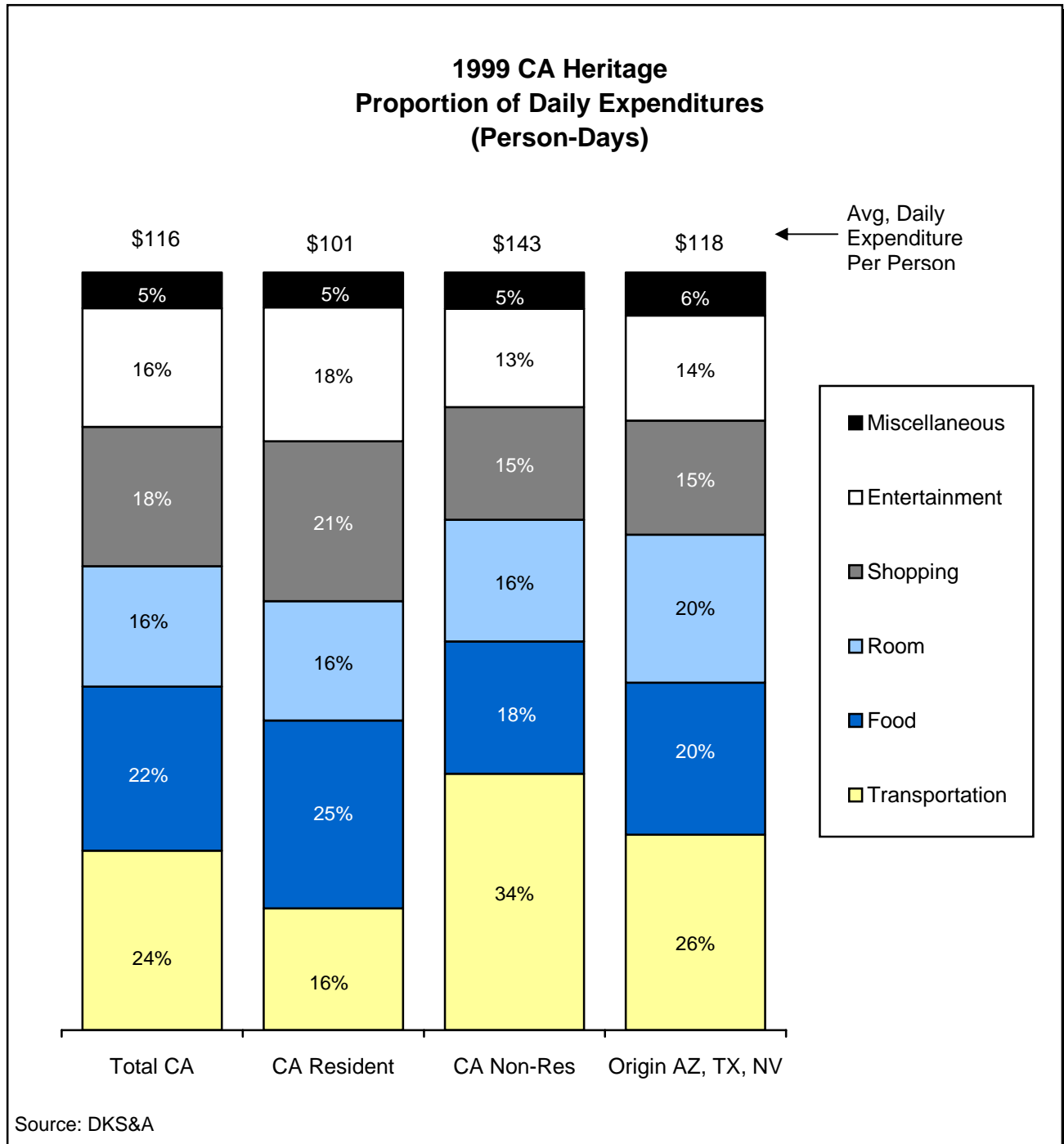


California Heritage Tourism

Daily Expenditure of CA Heritage Travelers – **California Heritage Travelers Spent More**

California Heritage travelers spent \$116 per person per day in 1999, up \$5 per person per day since 1998.

- Residents spent higher shares of their travel dollars on Entertainment, Shopping and Food, while Non-Residents spent a higher share on Transportation costs.



California Heritage Tourism

Direct Spending* Estimates for CA Heritage Travelers – **California Heritage Travelers Contributed \$17.7 Billion to California’s Economy in 1999**

- California gained \$17.7 billion from those visitors who engaged in Heritage activities in 1999. Resident Heritage travelers contributed the majority (58%) of these travel dollars.

1999 CA Heritage Direct Spending

<i>Heritage</i>	<i>Person-Day Volume (millions)</i>	<i>Average Daily Expenditure (dollars)</i>	<i>Direct Spending (billions)</i>
CA Heritage	153.3	\$115.5	\$17.7
CA Res Heritage	101.0	\$101.2	\$10.2
CA Non-Res Heritage	52.3	\$142.9	\$7.5
Top Origins (AZ, TX, NV)	11.9	\$117.9	\$1.4

- Heritage travelers who participated in Cultural activities spent the most overall, adding \$6.9 billion to the state’s economy. Cultural activity participants actually spent less per person per day than those who Visited Historic Sites, but spent more days in the market resulting in higher overall spending.

1999 CA Heritage Activity Segments Direct Spending

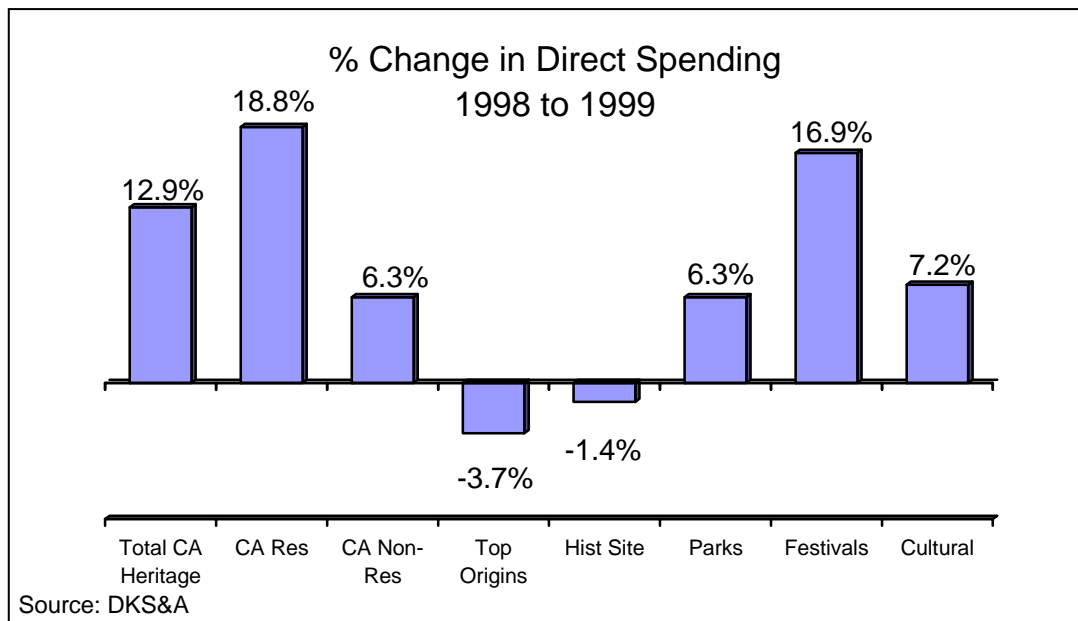
<i>Heritage Activities</i>	<i>Person-Day Volume (millions)</i>	<i>Average Daily Expenditure (dollars)</i>	<i>Direct Spending (billions)</i>
Visit Historic Sites	46.8	\$128.3	\$6.0
Visit National/State Parks	61.4	\$98.6	\$6.1
Festivals/Craft Fairs	37.1	\$110.5	\$4.1
Cultural	56.0	\$122.6	\$6.9

* **DIRECT SPENDING** – Heritage per person per day expenditures multiplied by Total Heritage Person-Days. Please note that the calculation for Direct Spending includes transportation expenditures that may have been spent en route or in origin markets.

California Heritage Tourism

Change in Direct Spending among CA Heritage Travelers – Spending by Heritage Travelers Increased 12.9% from 1998 to 1999

- Spending among California Resident Heritage travelers increased dramatically, up 18.8% from 1998 to 1999. This is a promising trend considering that the state’s resident travelers make up 81.4% of all Heritage travel in the state. Spending among California Non-Resident Heritage travelers also increased, rising 6.3%.
- Although Heritage Person-Trip and Person-Day visitor volume increased from the top origin markets of Arizona, Texas, and Nevada, overall direct spending was down 3.7%. This decrease in spending occurred in many spending categories including transportation, food, shopping, and entertainment. A decline in spending that is not a result of declines in either number of people or their length of stay is often related to decreases in satisfaction and value perceptions of travelers. California Heritage marketers may consider further investigation into declining Satisfaction and Value ratings among Heritage travelers from their top origin markets for Heritage travel.



- Among the activity groups, spending rose most significantly among those visitors who participated in Festival/Craft Fair activities, up 16.9%. Likewise, spending increased among Cultural participants and Park visitors, up 7.2% and 6.3%, respectively.
- Conversely, spending declined among those visitors who Visited Historic Sites, down 1.4%. This decrease was due to the decline in the number of Person-Days spent in the market between 1998 and 1999.

California Heritage Tourism

1998 CA Heritage Direct Spending

<i>Heritage</i>	<i>Person-Day Volume (millions)</i>	<i>Average Daily Expenditure (dollars)</i>	<i>Direct Spending (billions)</i>
CA Heritage	142.2	\$110.3	\$15.7
CA Res Heritage	91.3	\$94.2	\$8.6
CA Non-Res Heritage	51.0	\$137.8	\$7.0
Top Origins (AZ, TX, NV)	11.0	\$132.5	\$1.5

1998 CA Heritage Activity Segments Direct Spending

<i>Heritage Activities</i>	<i>Person-Day Volume (millions)</i>	<i>Average Daily Expenditure (dollars)</i>	<i>Direct Spending (billions)</i>
Visit Historic Sites	48.6	\$125.3	\$6.1
Visit National/State Parks	56.3	\$101.2	\$5.7
Festivals/Craft Fairs	32.5	\$107.9	\$3.5
Cultural	52.1	\$122.9	\$6.4

* **DIRECT SPENDING** – Heritage per person per day expenditures multiplied by Total Heritage Person-Days. Please note that the calculation for Direct Spending includes transportation expenditures that may have been spent en route or in origin markets.

California Heritage Tourism

Acceptability Ratings – **Satisfaction and Value Ratings Rose Slightly Overall**

Resident, Non-Resident and Top Origin Market Ratings

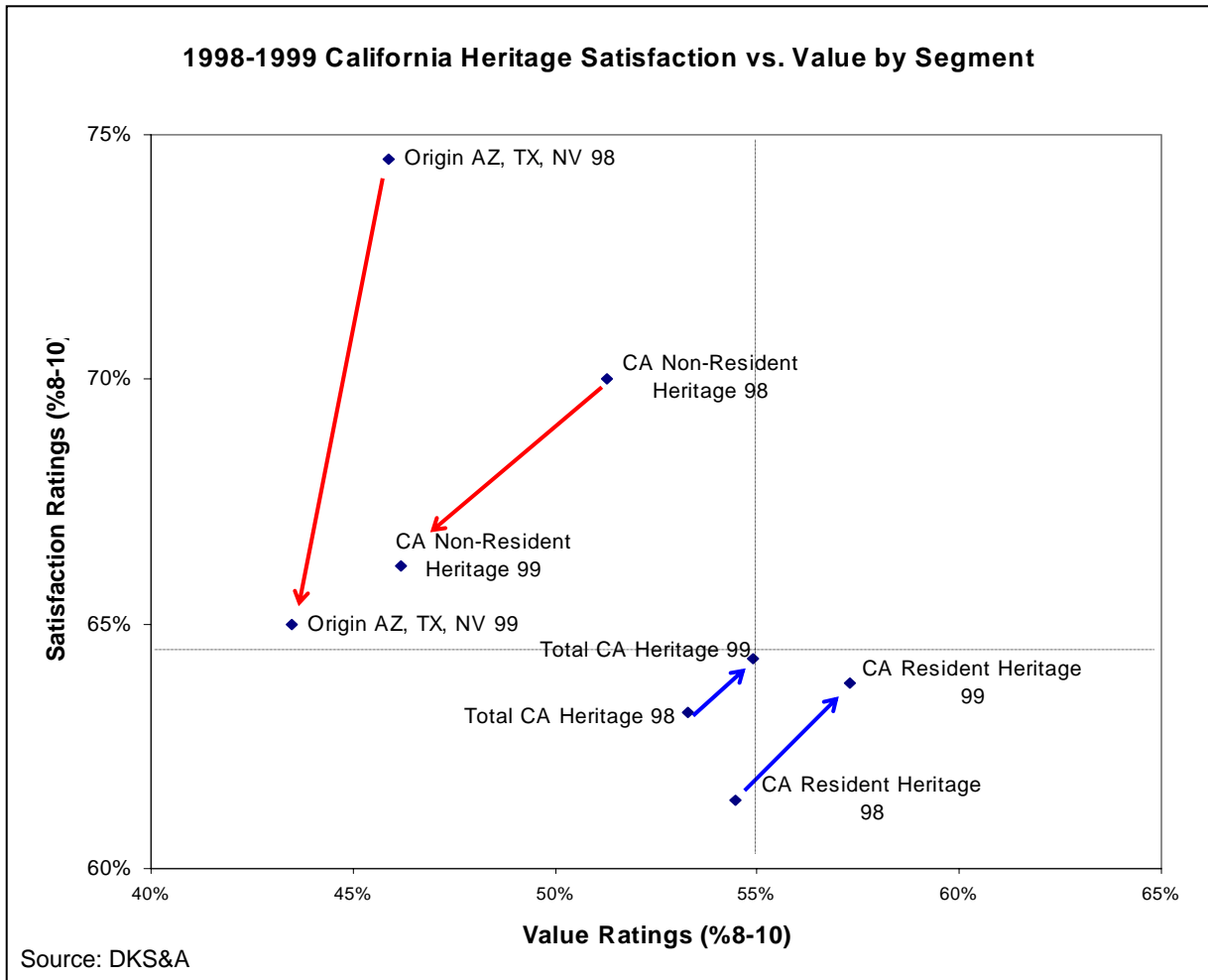
Satisfaction

- The percentage of California Heritage travelers that rated the destination Excellent (8 to 10 on 10 point scale) in terms of Satisfaction rose 1 percentage point to 64% in 1999. Satisfaction Ratings by Resident Heritage travelers also rose, up 2 percentage points to 64%.
- Satisfaction ratings were also high among Non-Resident and Top Origin market Heritage travelers, with 66% and 65% reporting Excellent ratings, respectively. However, these ratings were lower than in 1998 when 70% of Non-Residents and 75% of Top Origin market Heritage travelers reported Excellent Satisfaction ratings.
 - Declines in Satisfaction ratings among Non-Resident travelers are particularly noteworthy since Non-Resident travelers spend more per person on a daily basis on their trips.
 - The decline in Satisfaction ratings by Top Origin market travelers may have been a cause of decreased overall direct spending by this group between 1998 and 1999. Declining Satisfaction ratings may also be a result of decreased Value-for-the-Money perceptions.

Value

- The percentage of California Heritage travelers that rated the destination Excellent (8 to 10 on 10 point scale) in terms of Value-for-the-Money rose 2 percentage points to 55% in 1999. As with Satisfaction ratings, Value ratings by Resident Heritage travelers also rose, up 3 percentage points to 57%.
- Value ratings were considerably lower among Non-Resident and Top Origin market Heritage travelers, with 46% and 44% reporting Excellent Value ratings, respectively. As with Satisfaction ratings among these two groups, Value ratings also dropped between 1998 and 1999, down 5 percentage points among Non-Residents and 2 percentage points among Top Origin market travelers.

Satisfaction and Value by Heritage Travel Segment: 1999 vs. 1998



Activity Group Ratings

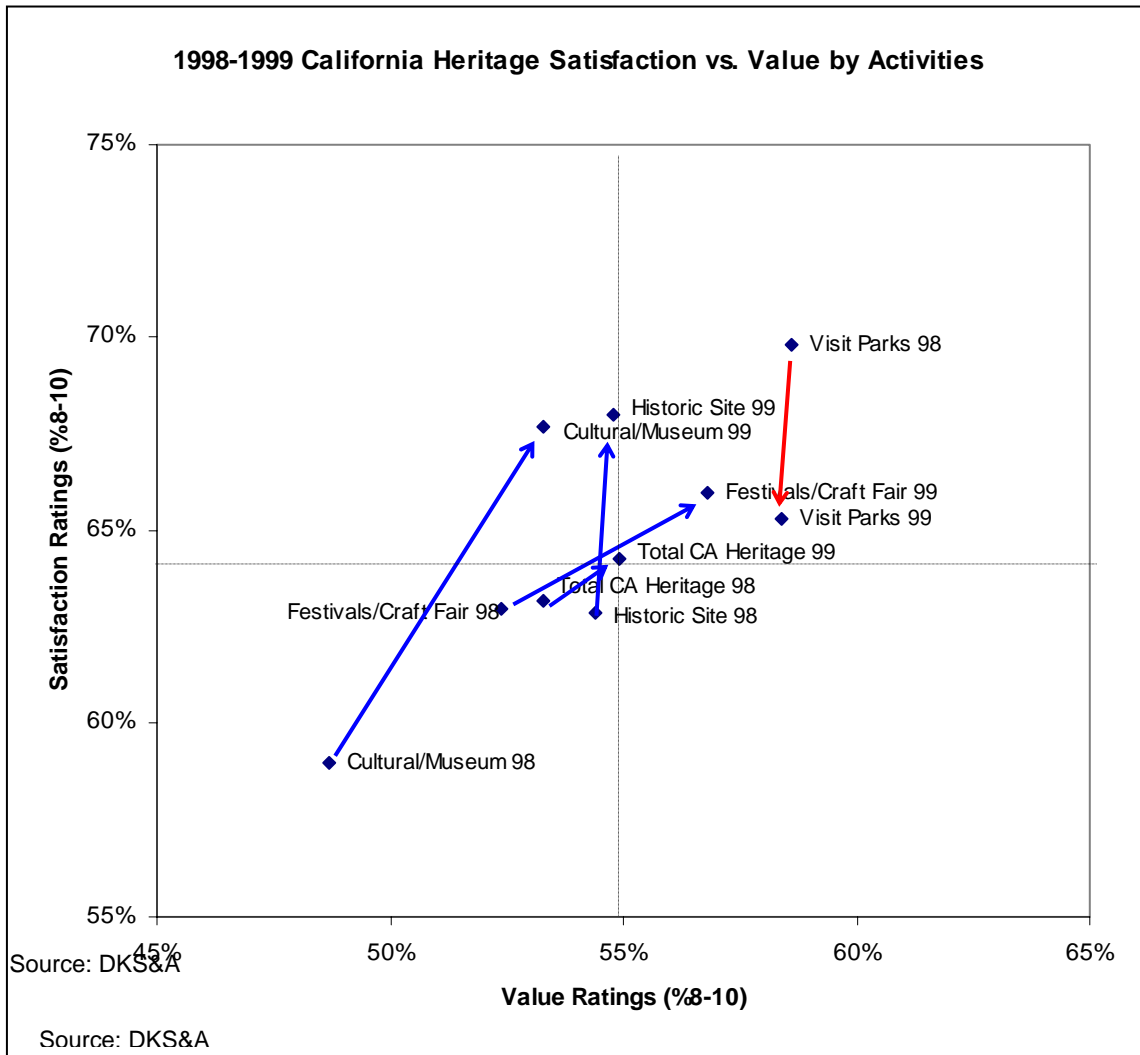
Satisfaction

- The various Heritage activity group participants also reported high Satisfaction ratings for their trips, with increases in Excellent Satisfaction ratings for Festivals/Craft Fair (+3 percentage points), Visit Historic Sites (+5 percentage points), and Cultural activities (+9 percentage points).
- Those who Visited National/State Parks, however, reported a lower share of Excellent Satisfaction ratings, down 5 percentage points from 1998. This decrease in Satisfaction should be investigated further since this group reported higher Person-Day visitor volume than the other Heritage activity groups, as well as an increase in overall spending.

Value

- Although Satisfaction ratings were lower for those who Visited National/State Parks, these visitors reported the highest Value ratings among the activity groups, with 58% reporting Excellent Value ratings
- Participants in Festivals/Craft Fairs, Visitors to Historic Sites, and Cultural participants reported Excellent Value rating shares of 57%, 55% and 53%, respectively in 1999.

Satisfaction and Value by Heritage Activity: 1999 vs. 1998

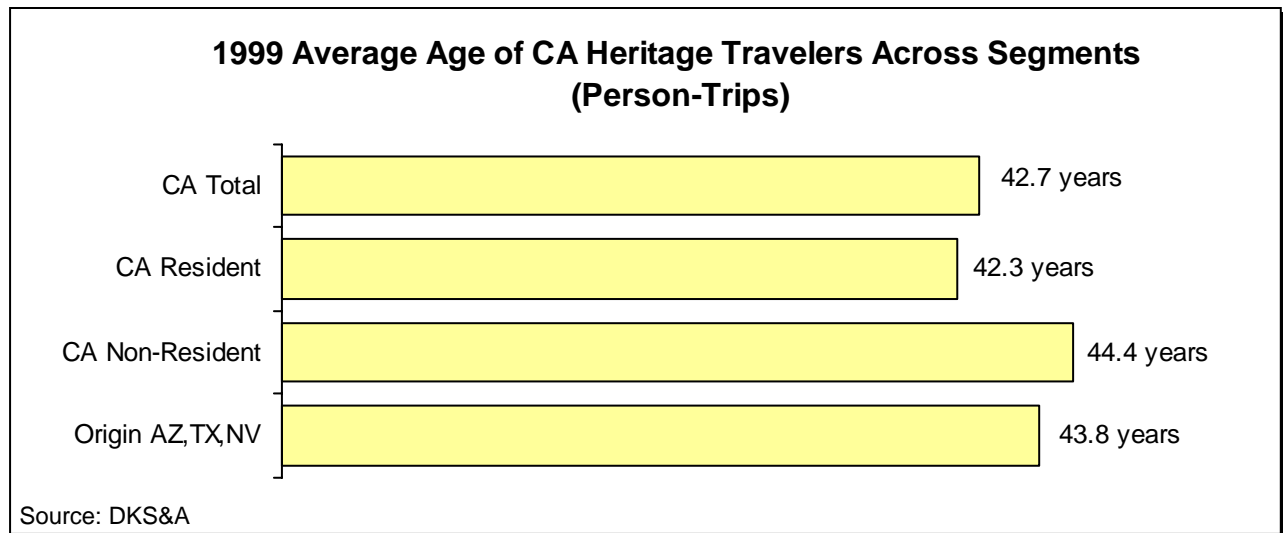


Targeting

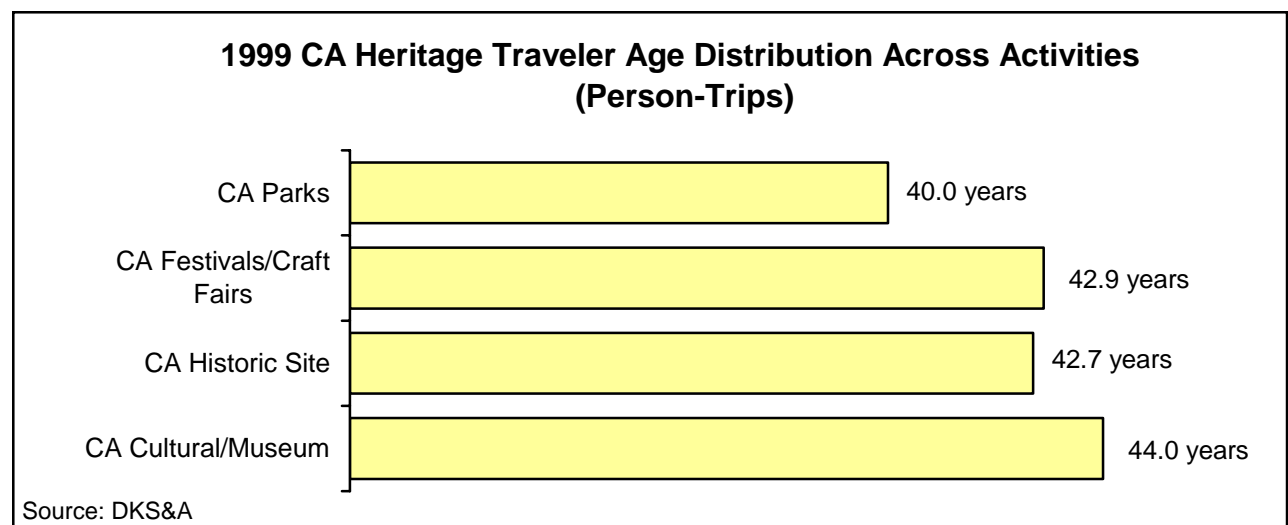
California Heritage Tourism

Average Age – **The Average California Heritage Traveler was 43 Years Old in 1999**

- The average age of Resident Heritage visitors to California decreased from 43.9 years in 1998 to 42.3 years in 1999, while the average age of Non-Resident Heritage visitors rose from 42.5 years in 1998 to 44.4 years in 1999. Similarly, the average age of Heritage visitors from Arizona, Texas and Nevada also rose from 41.3 years in 1998 to 43.8 years in 1999.



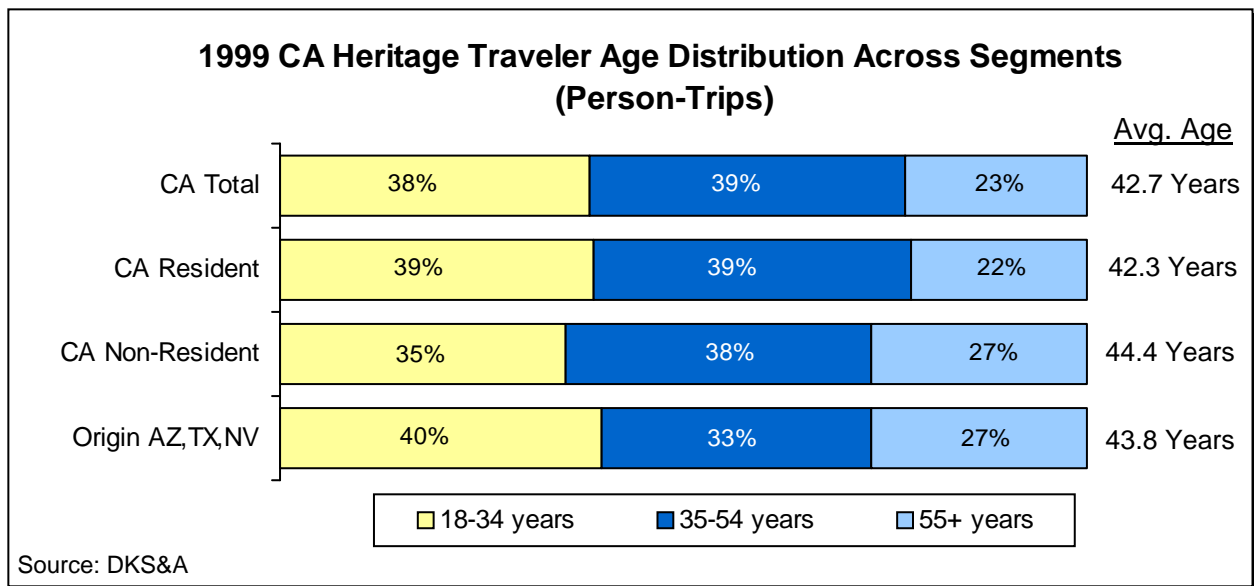
- The decrease in the average age of CA Heritage travelers was the result of declining average ages for visitors for all heritage related activities, with the average ages of CA's Cultural/Museum visitors declining the most (from 45.5 years in 1998 to 44.0 years in 1999).



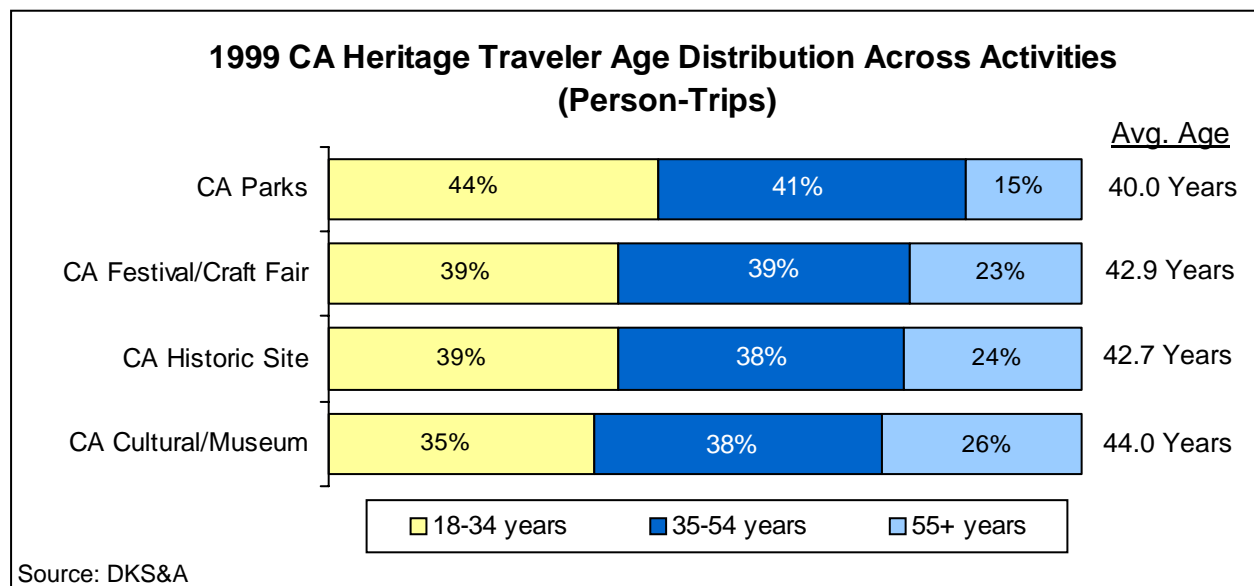
California Heritage Tourism

Age Distribution – Resident Heritage Travelers Became Younger, While Non-Resident Heritage Travelers Aged

- The decrease in average age among Resident Heritage travelers was the result of a shift from Seniors and Baby Boomers to Generation X travelers (up 5.1 percentage points). Similarly, the increase in average age among Non-Resident Heritage travelers, as well as those originating from Arizona, Texas and Nevada was the result of increased visitation by Senior travelers (up 5.4 and 5.3 percentage points, respectively).



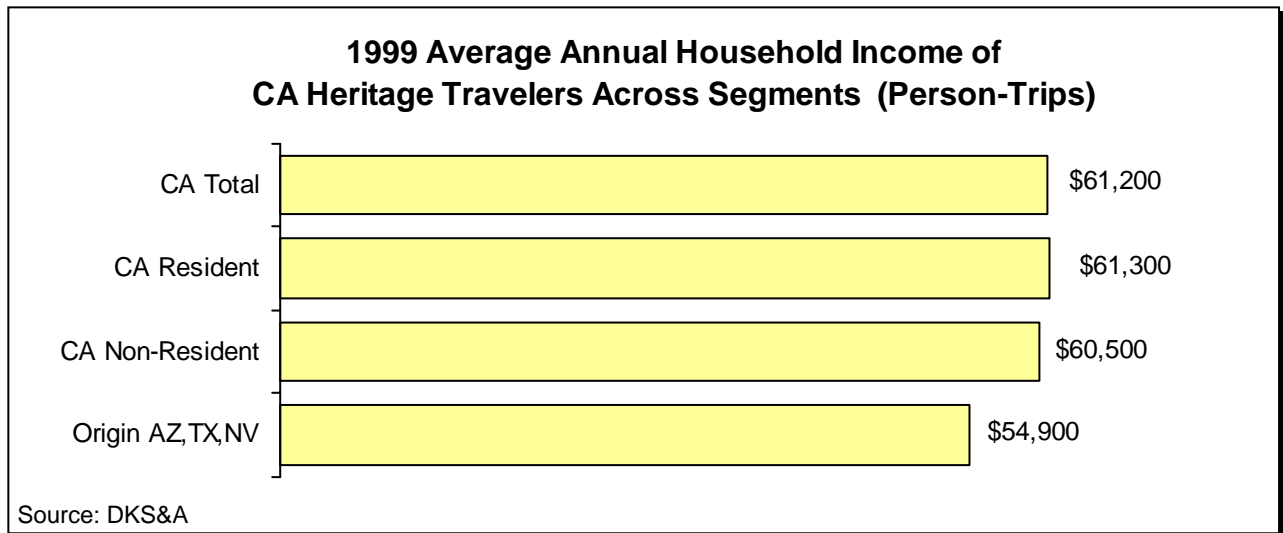
- The decrease in the average age of CA’s Cultural/Museum visitors was the result of a shift from Senior and Baby Boomer travel to Generation X travel (up 4.7 percentage points).



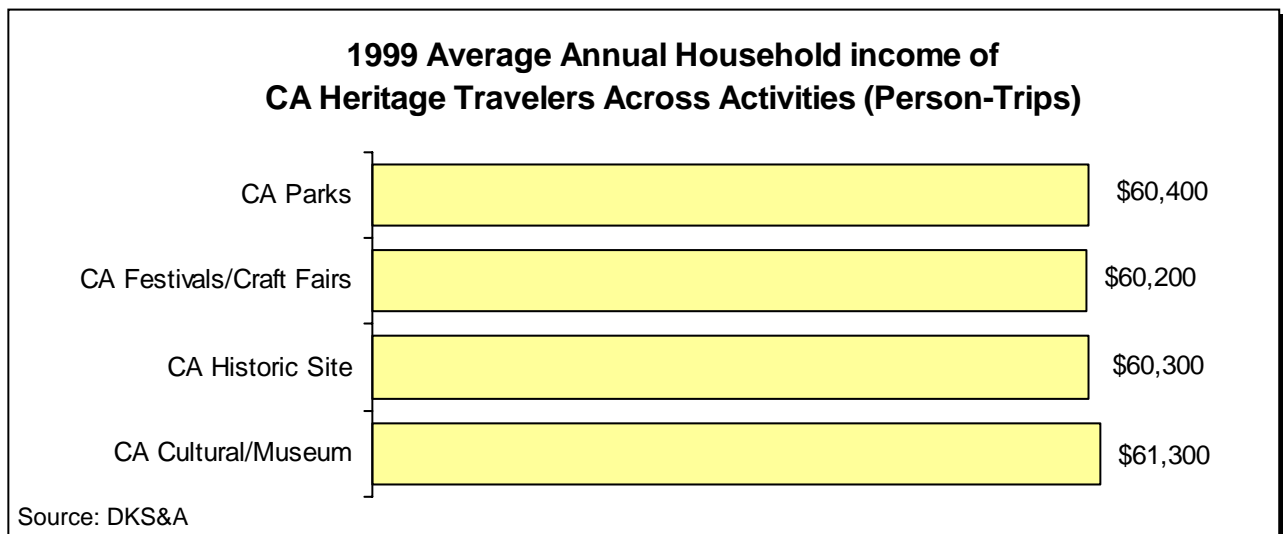
California Heritage Tourism

Average Annual Household Income – Average Income Increased

- The typical California Heritage traveler had an average annual household income of \$61,200 in 1999, up \$3,400 over 1998.
- California Resident and Non-Resident Heritage travelers had similar average incomes, while Heritage travelers from Arizona, Texas, and Nevada had considerably lower incomes, with an average annual household income of \$54,900, down \$10,400 from 1998.



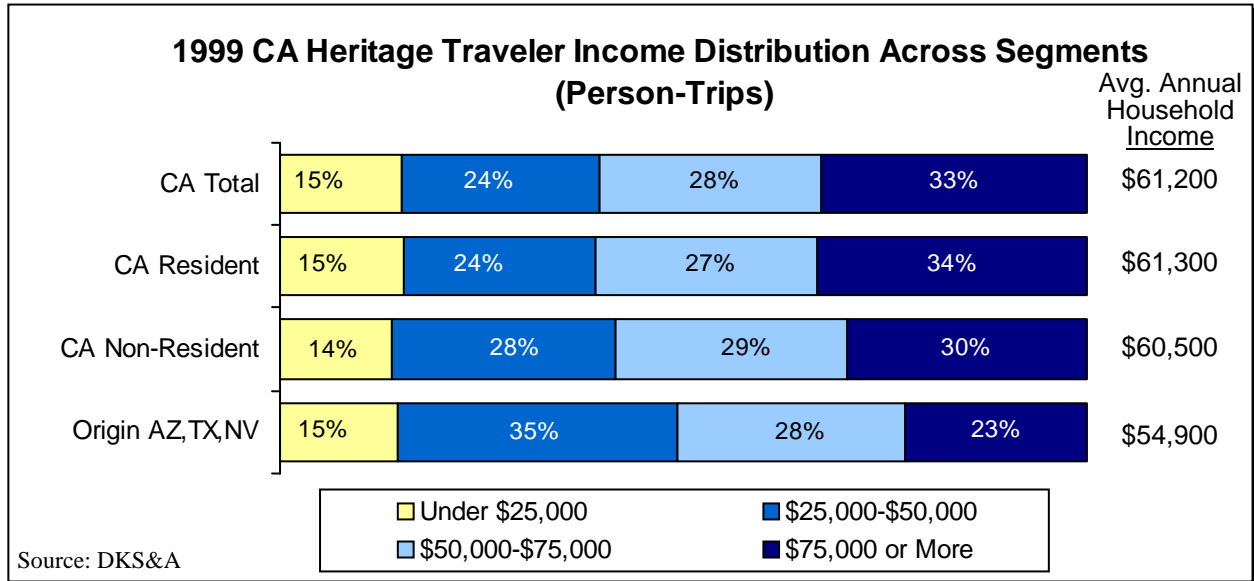
- Average annual household incomes among the various Heritage activity groups were similar to the state Heritage travel average, each increasing over 1998 levels.



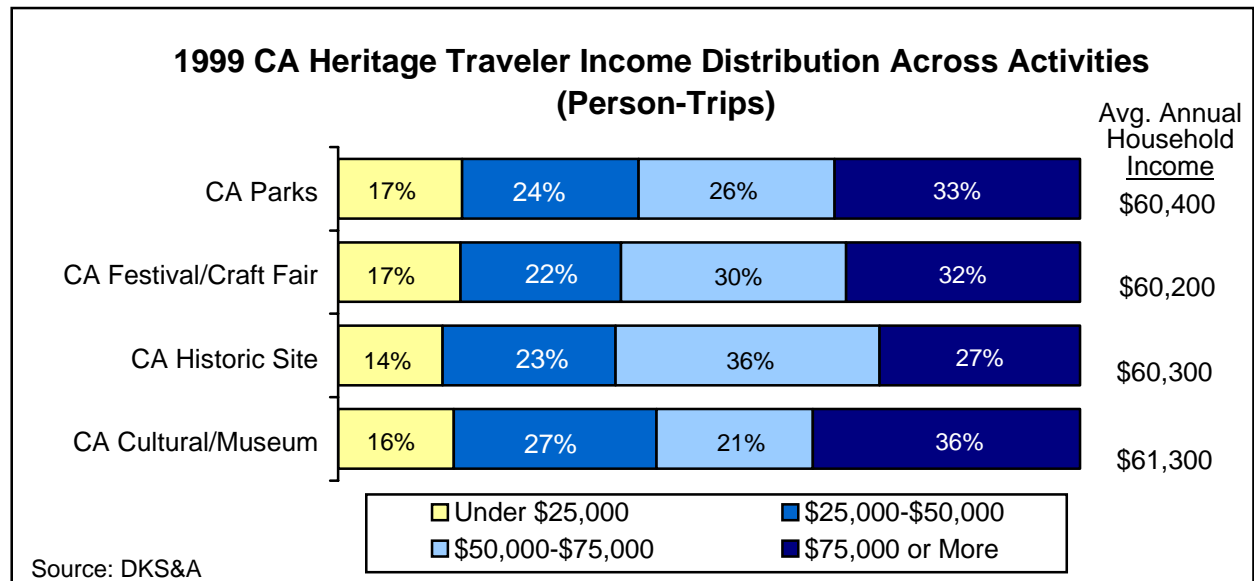
California Heritage Tourism

Average Annual Household Income Distribution – Resident Heritage Travelers Became Wealthier

- California Resident Heritage travelers were comprised of the highest share of visitors earning \$75,000 or higher, with a share of 34% in 1999. This share was up 11 percentage points over the previous year. Conversely, Heritage travelers from the Top Origin states had the lowest share at 23%, down 11 percentage points from 1998.



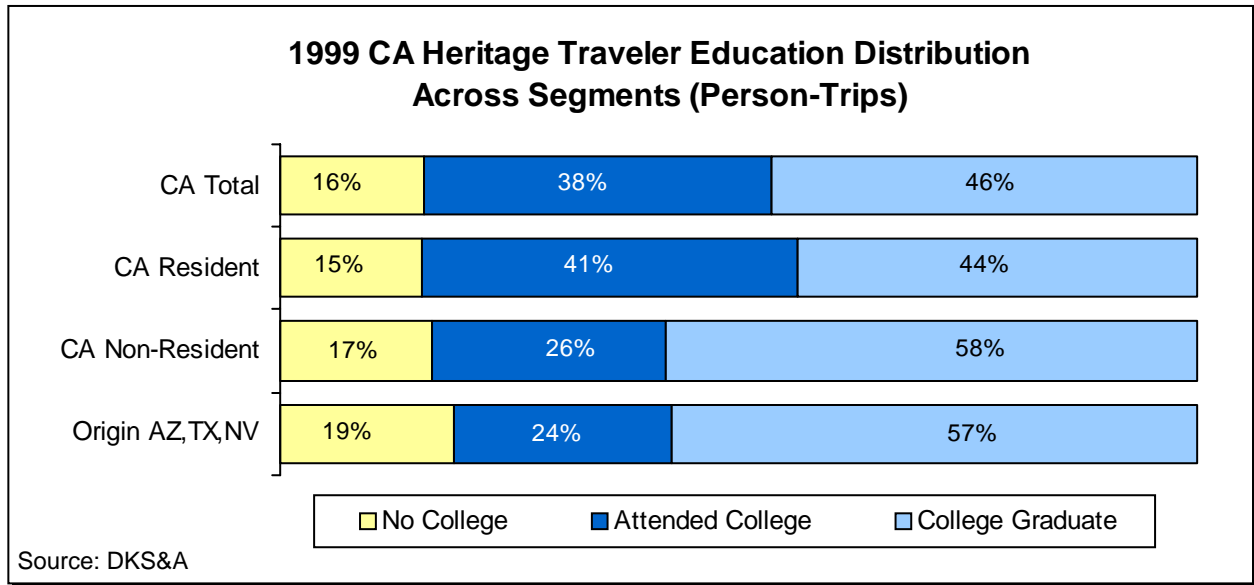
- Cultural activity participants had the highest average annual household income, with a full 36% reporting incomes of \$75,000 and higher in 1999.
- When examining incomes among the individual activity groups, it is clear that Heritage travelers are becoming wealthier. Each activity group reported increases in the share of \$75,000 + category, with Festivals/Craft Fairs up 12 percentage points, and Cultural, Visit Parks, and Visit Historic Sites up 10, 8, and 3 percentage points, respectively.



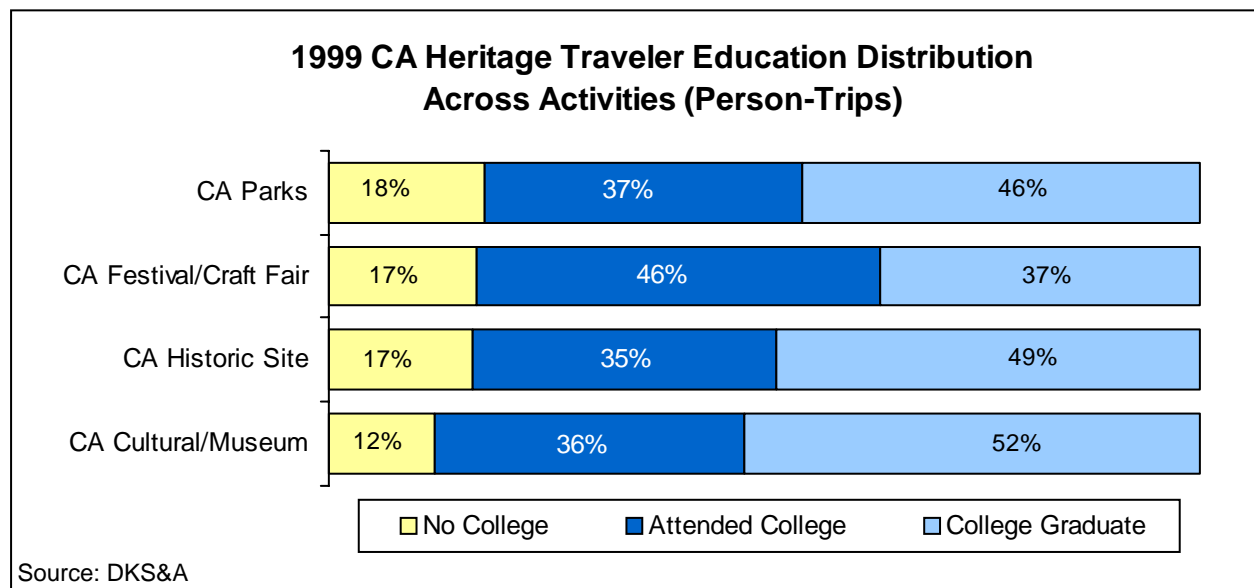
California Heritage Tourism

Education Distribution – **Non-Residents and Cultural Visitors Were the Most Educated**

- California Non-Resident Heritage travelers had the highest share of college graduates (58%) among the California segments. It is interesting to note that, despite their lower income levels, California Heritage travelers from the Top Origin markets had a relatively high share of college graduates (57%).



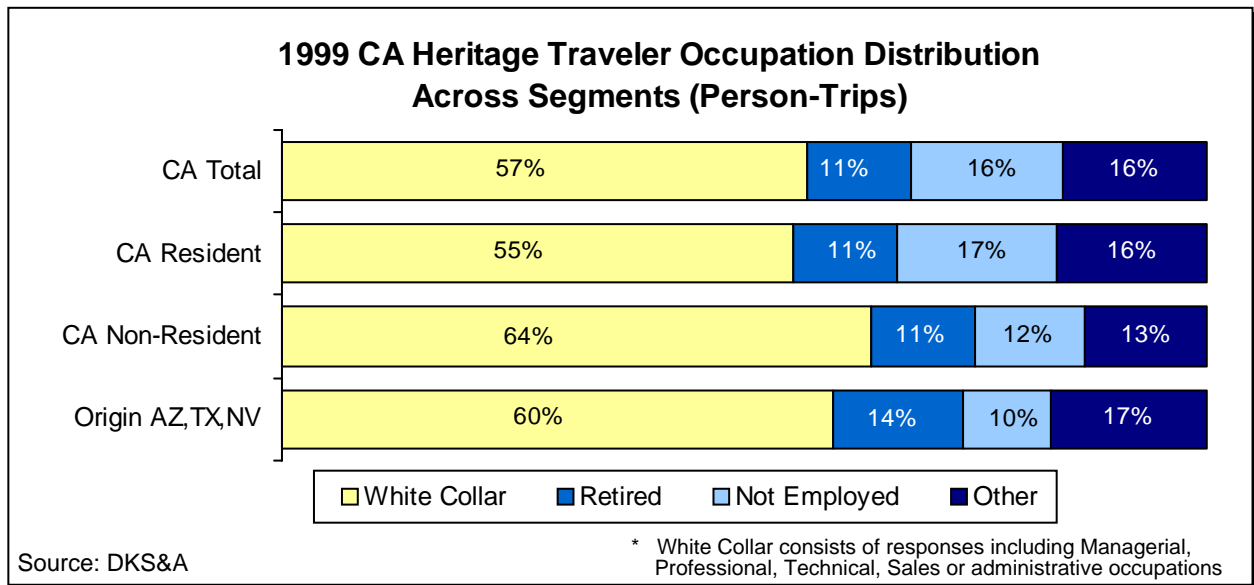
- Relative to the average for the state (46%), participants in Festivals/Craft Fairs had the lowest share of college graduates (37%), while Cultural travelers had the highest share (52%) of college graduates in 1999.



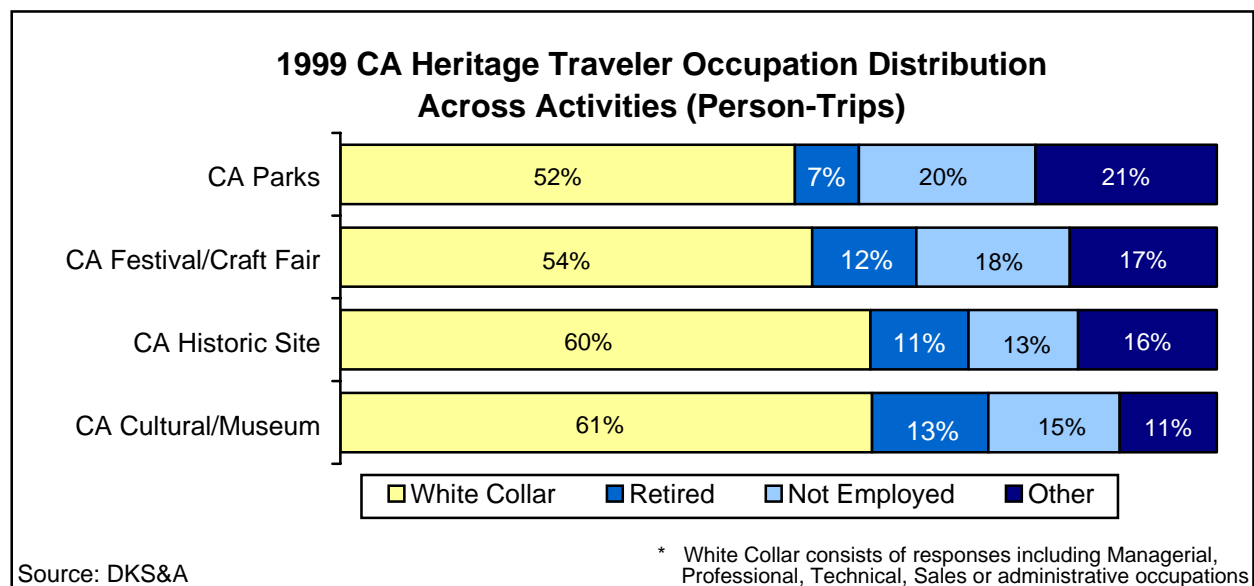
California Heritage Tourism

Occupation Distribution – Heritage Travelers Were Primarily White-Collar Professionals

- The majority of California Heritage travelers hold White Collar jobs such as Managerial or Professional jobs, or Technical, Sales or Administrative Support jobs. Fifty-seven percent were White Collar employed in 1999.



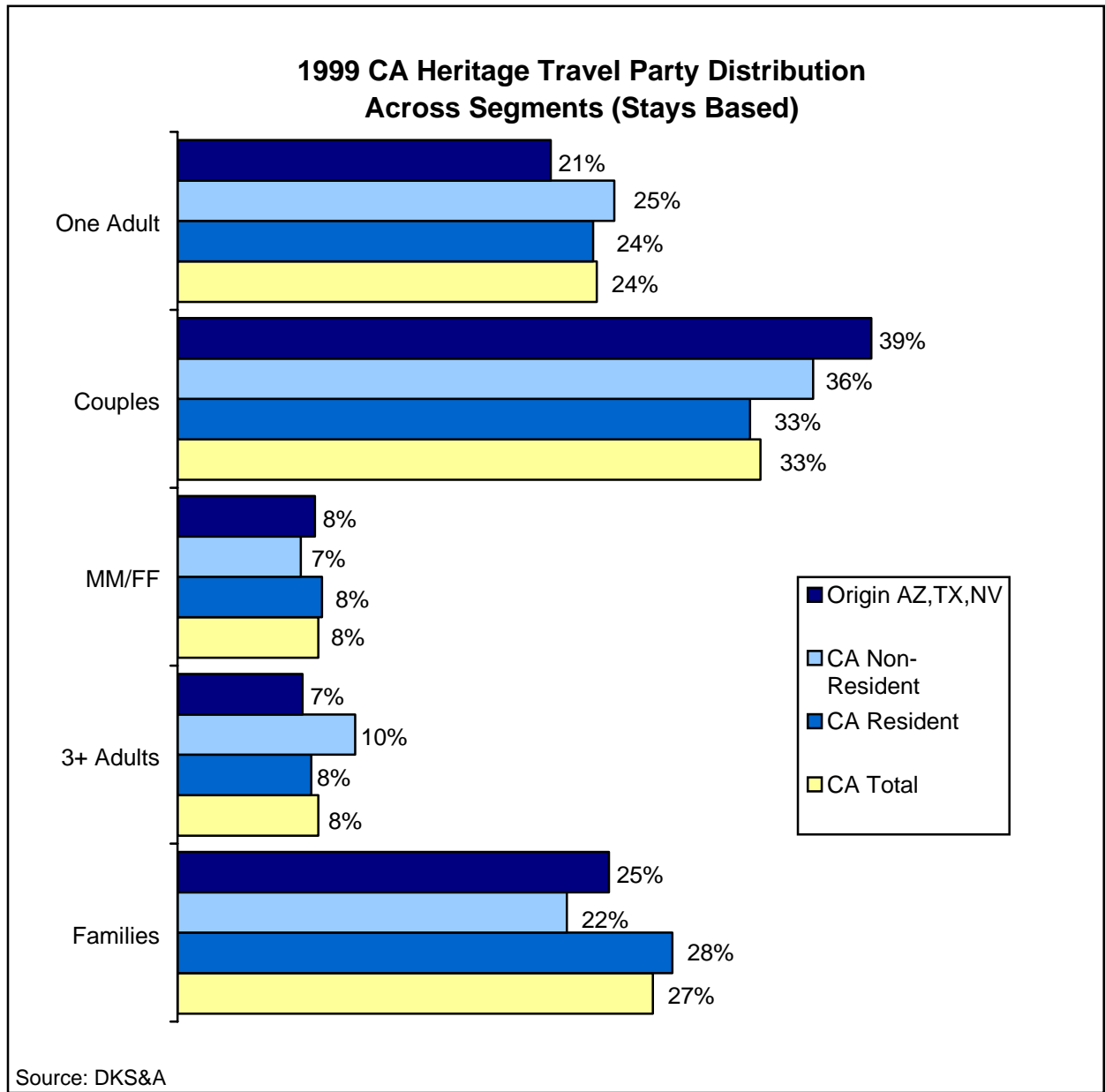
- Among the individual activity groups, those who participated in Cultural activities had the highest share of White Collar professionals (61%), while those who Visited National/State Parks had the highest share of not employed (20%) and other (21%) travelers.



California Heritage Tourism

California Travel Party Distribution – Couples and Families Were the Primary Travel Groups

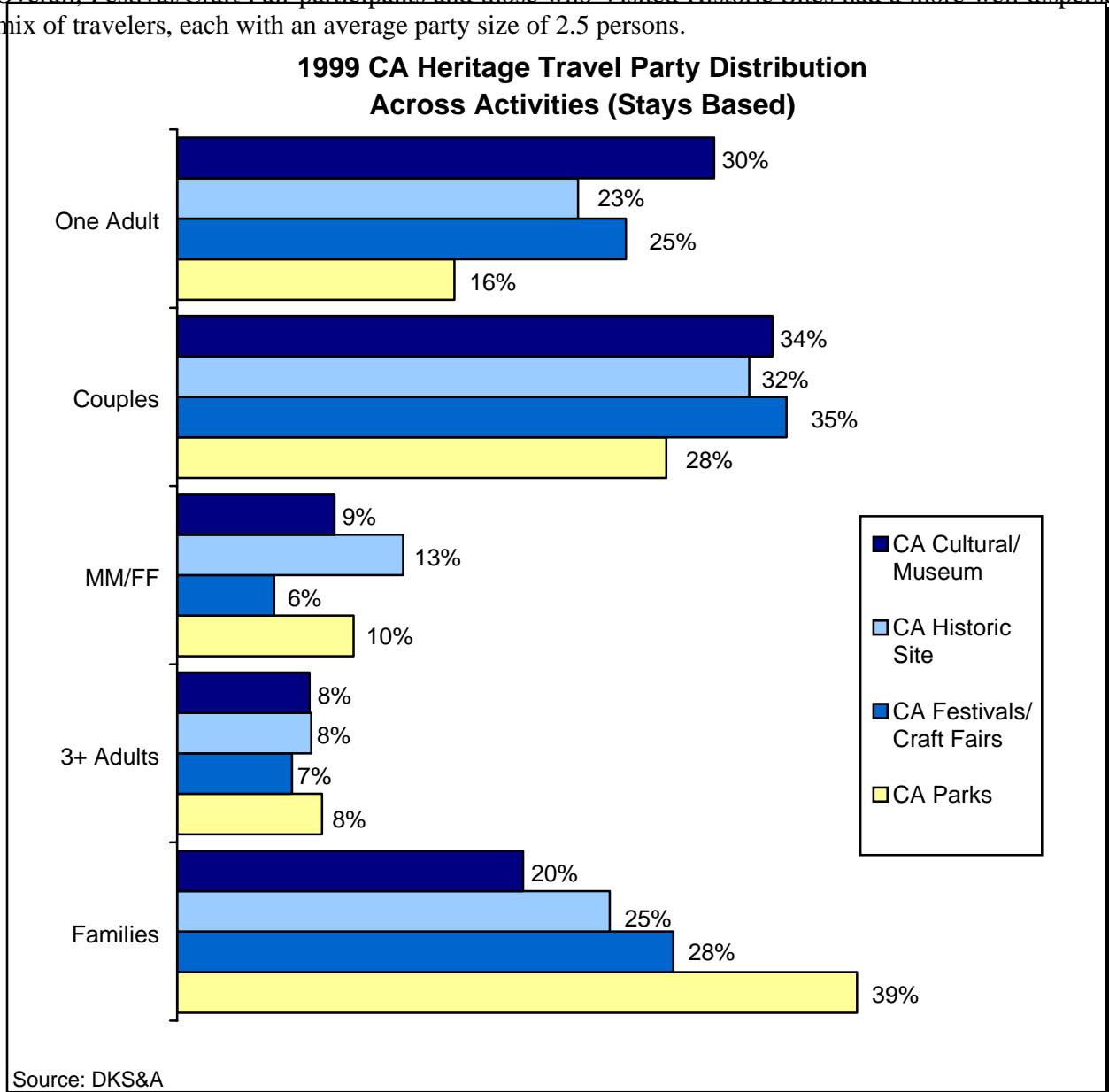
- Overall, the majority of California Heritage travelers are Couples (33%), followed closely by Families (27%). Non-Resident Heritage travelers are comprised of a higher share of Couples (36%) than Residents (32%), and a lower share of Families (22%) than Residents (28%). In fact, Couple travel by Non-Residents rose 10 percentage points between 1998 and 1999, while Family travel fell 8 percentage points.
- California’s Top Origin markets for Heritage travel claimed the highest share of travel by Couples (39%), up 13 percentage points from 1998. Reflecting this large increase was a sharp decline in share of travel by Families, down 13 percentage points to 25%.



California Heritage Tourism

California Travel Party Distribution – Travel Party Composition Varied Widely Across the Heritage Activity Groups

- There were significant differences in the party composition of the various Heritage activity groups in 1999. In general, those Heritage travelers who Visited National/State Parks tended to travel in larger groups (average party size of 3.2 people), such as Families (39%), up 3 percentage points from 1998.
- Cultural travelers traveled more as Couples (34%, up 2 percentage points) and Adults Traveling Alone (30%, up 6 percentage points) and had the lowest share of Family travel (20%, down 5 percentage points).
- Overall, Festival/Craft Fair participants and those who Visited Historic Sites had a more well dispersed mix of travelers, each with an average party size of 2.5 persons.

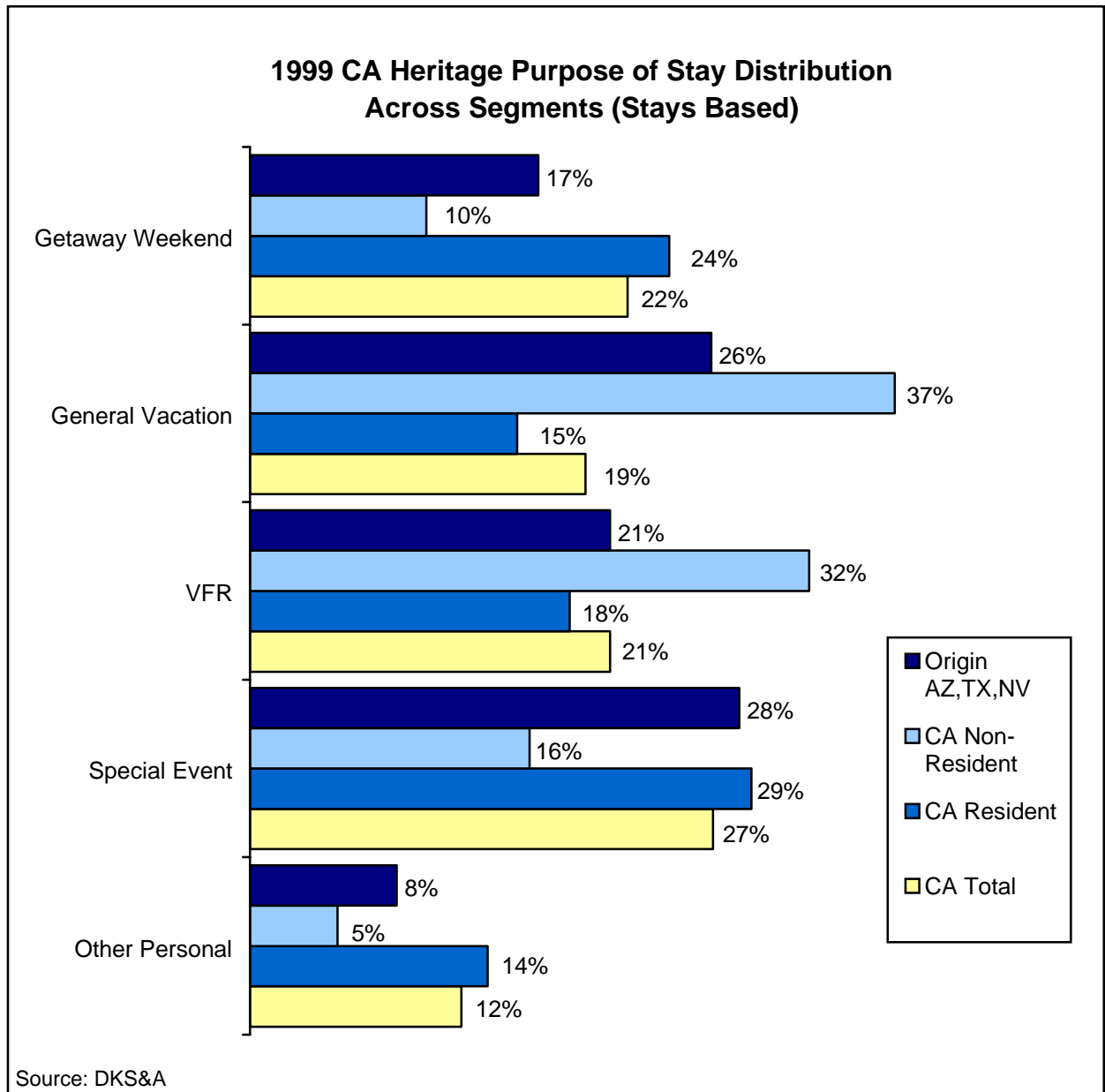


Positioning

California Heritage Tourism

California Purpose of Stay Distribution – Residents and Non-Residents Traveled for Different Reasons on Trips on Which they Participated in Heritage Activities

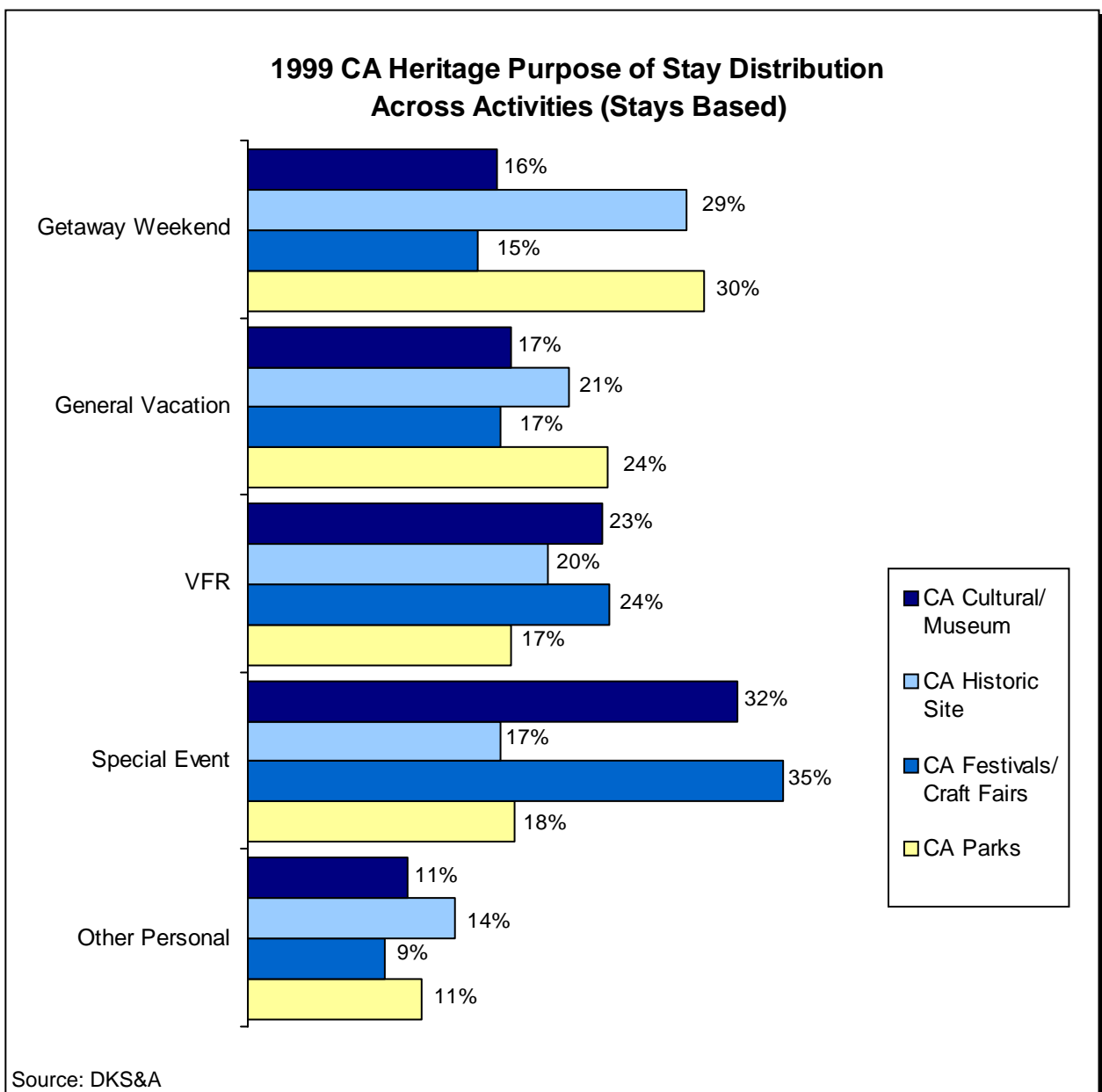
- Resident and Non-Resident travelers who engaged in Heritage activities traveled to the state for different reasons. Resident travelers were more likely than Non-Resident travelers to be on a Getaway Weekend, attending a Special Event or Other Personal event while Non-Resident travelers were more likely to be on a General Vacation or Visiting Friends and Relatives.



California Heritage Tourism

California Purpose of Stay Distribution Across Activities – The Various Heritage Activity Groups Visited California for a Variety of Purposes

- Among the various Heritage activity groups, travelers who participated in Visiting National/State Parks were very similar to those who Visited Historic Sites in terms of purpose of stay, with the majority in both groups coming for Getaway Weekends and General Vacations.
- Likewise, those who attended Festivals/Craft Fairs were very similar to those who participated in Cultural activities in terms of purpose of stay, with the majority in both groups coming for a Special Event or to Visit Friends and Relatives.
- Each activity group experienced fluctuations in purpose of stay between 1998 and 1999.

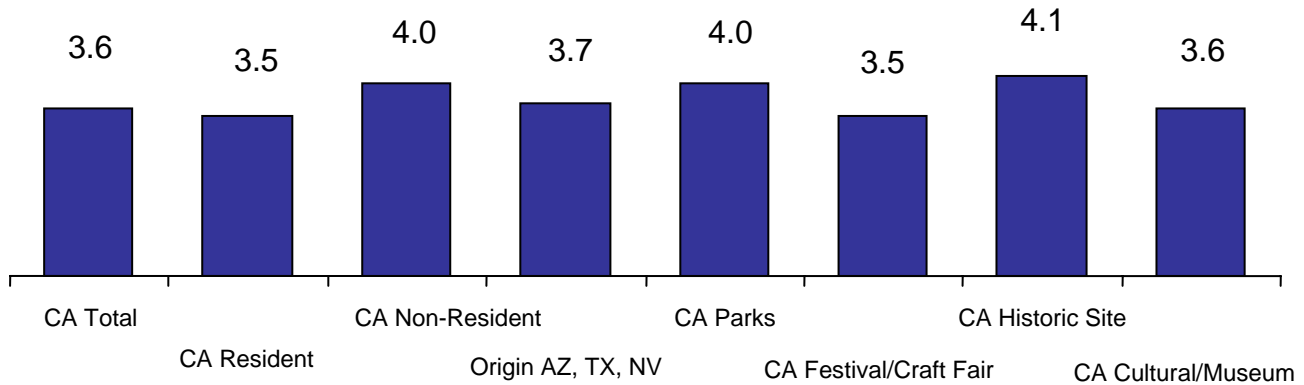


California Heritage Tourism

Activity Overview – **Non-Residents Were More Active than Residents**

- The average California Heritage traveler participated in 3.6 activities per trip. Non-Resident Heritage travelers were the most active among the California Heritage segments, participating in an average of 4.0 activities per trip.
- Among Heritage activity segments, those who Visited National/State Parks and Historic Sites were the most active, reporting averages of 4.0 and 4.1 activities per trip, respectively.

**Activities Per Trip for 1999 CA Heritage Travelers
by Segments and Activities (Person-Days)**



Source: DKS&A

California Heritage Tourism

Top Activities for California Heritage Travel by Segment

CA Total	CA Resident	CA Non-Resident	Origin AZ, TX, NV
Dining	Dining	Sightseeing	Sightseeing
Sightseeing	Cultural/Museum	Entertainment	Parks
Entertainment	Entertainment	Dining	Dining
Cultural/Museum	Shopping	Historic Site	Entertainment
Shopping	Sightseeing	Parks	Cultural/Museum
Parks	Parks	Shopping	Shopping
Historic Site	Festival/Craft Fair	Cultural/Museum	Historic Site
Festival/Craft Fair	Historic Site	Beach	Beach

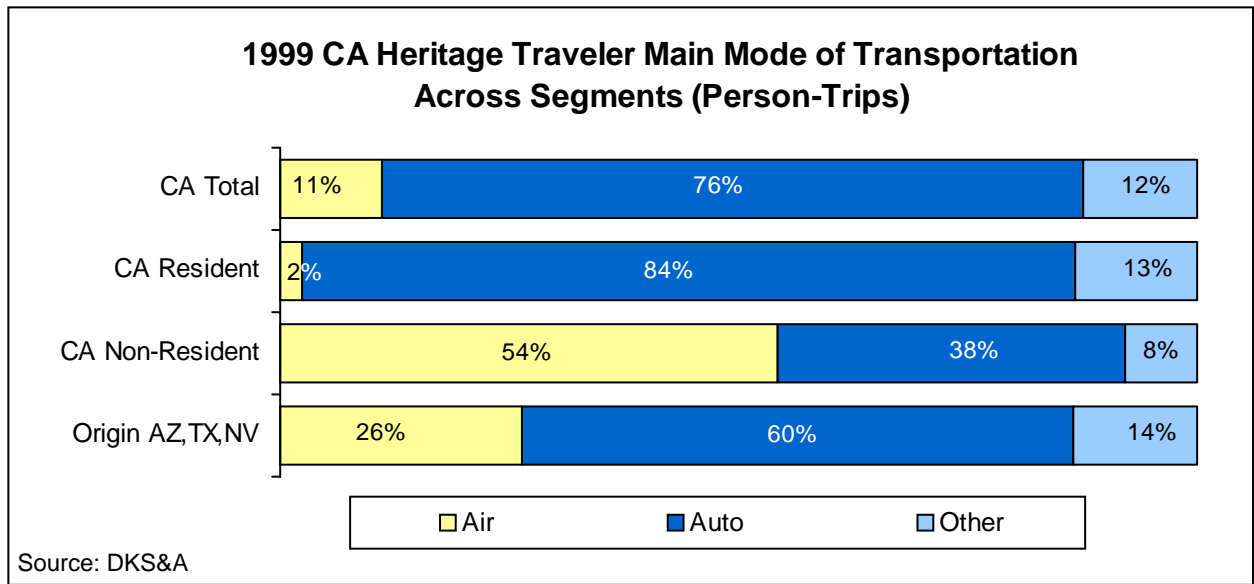
Top Activities for California Heritage Travel by Activity

CA Parks	CA Festivals/ Craft Fairs	CA Historic Site	CA Cultural/ Museum
Parks	Festival/Craft Fair	Historic Site	Cultural/Museum
Sightseeing	Shopping	Sightseeing	Dining
Dining	Dining	Dining	Entertainment
Entertainment	Entertainment	Shopping	Shopping
Beach	Sightseeing	Entertainment	Sightseeing
Shopping	Cultural/Museum	Parks	Festival/Craft Fair
Historic Site	Beach	Beach	Historic Site
Hike/Bike	Historic Site	Cultural/Museum	Beach

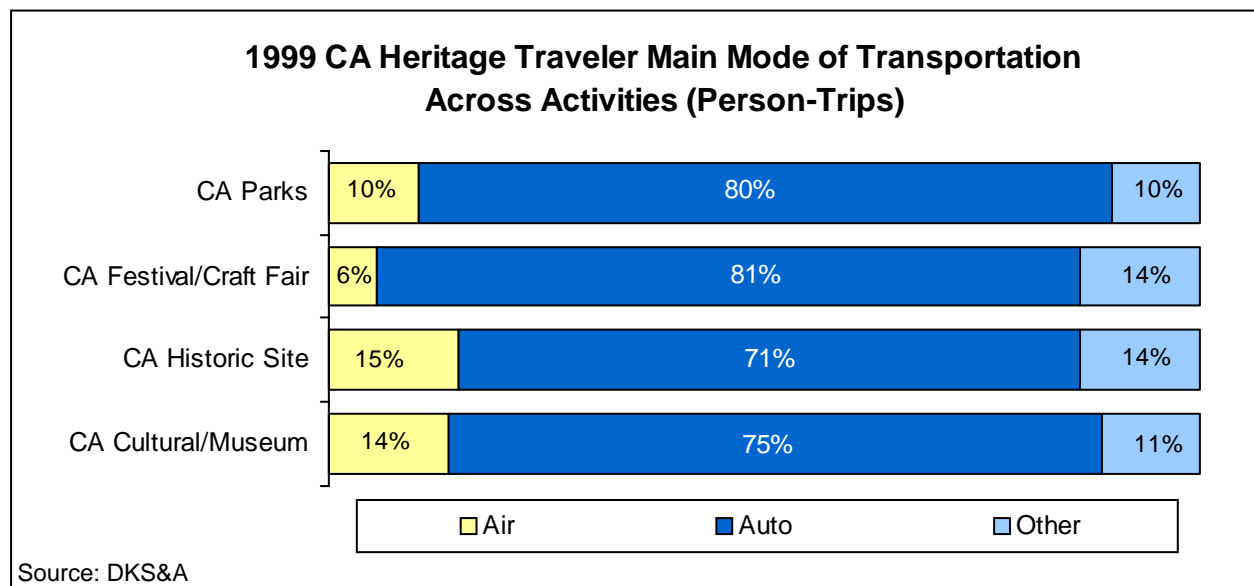
California Heritage Tourism

Main Mode of Transportation – Travel by Auto was the Main Mode of Transportation Choice Among Heritage Travelers

- In 1999, over three-quarters (76%) of California Heritage travelers traveled via Auto, including cars, vans and small trucks.
- Travel by Air fell dramatically among Heritage travelers from the Top Origin Markets, down 15 percentage points to 26% in 1999.



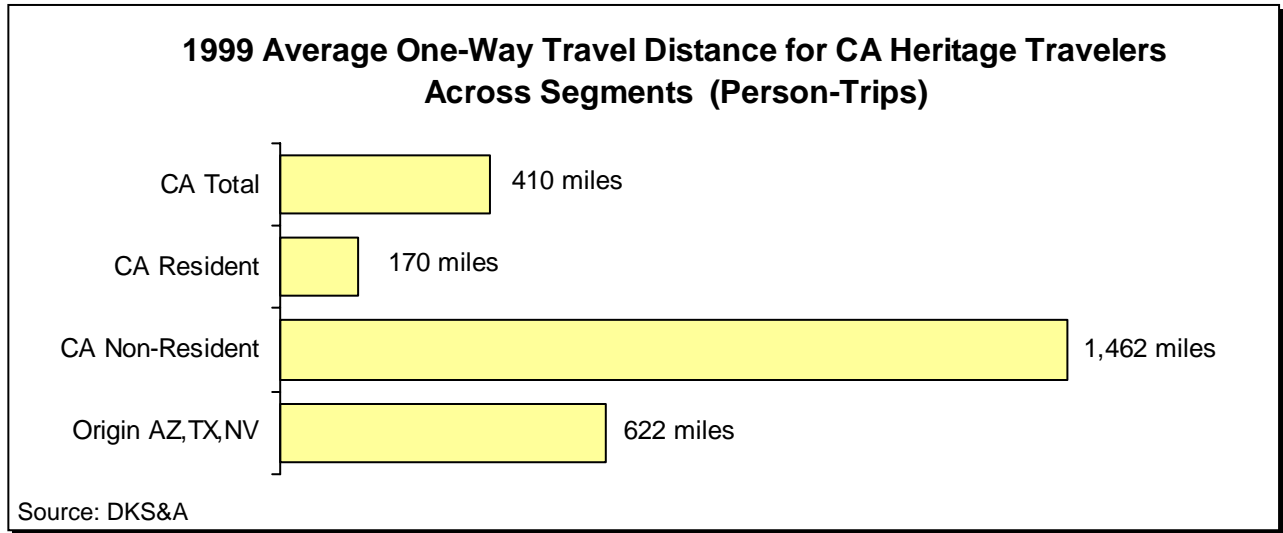
- Auto travel also dominated each of the Heritage activity groups, particularly among National/State Park visitors and attendees of Festivals/Craft Fairs.
- In fact, the share of Air travel was down in each of the activity groups, while travel by other modes of transportation, such as buses and trains, rose.



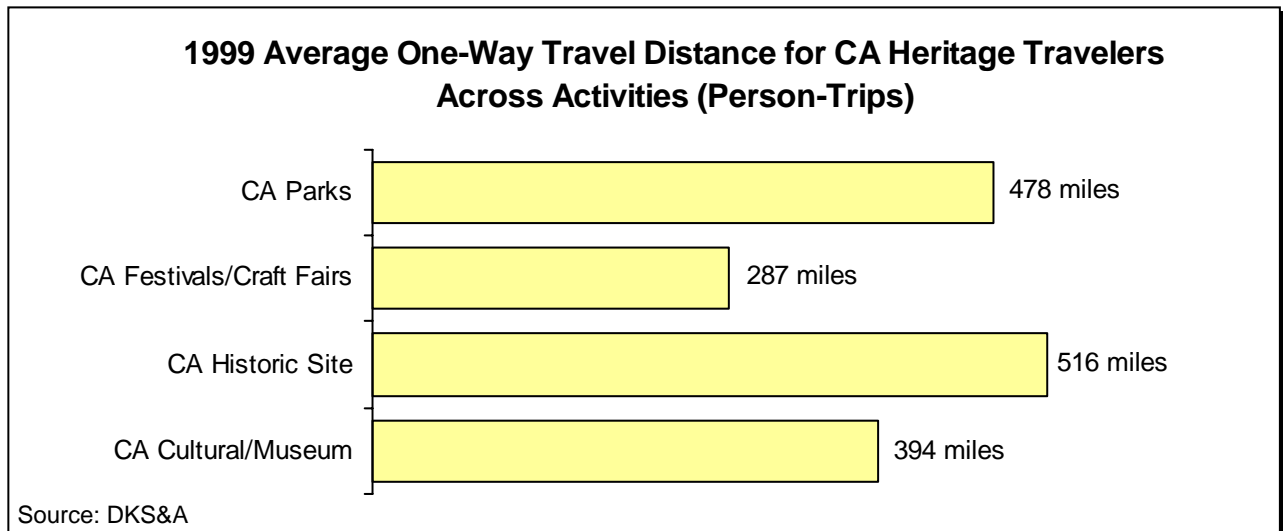
California Heritage Tourism

Average One-Way Travel Distance - Average One-Way Distances Varied Greatly Across the Heritage Segments and Activity Groups

- The average California Heritage traveler traveled 410 miles one way to reach their destination within the state.

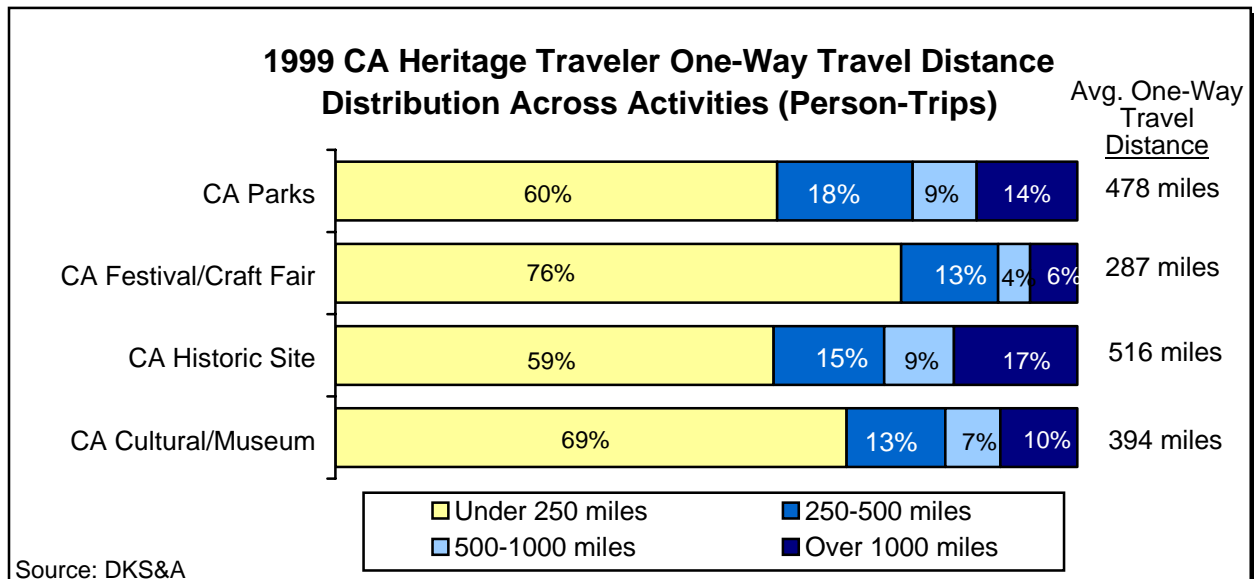
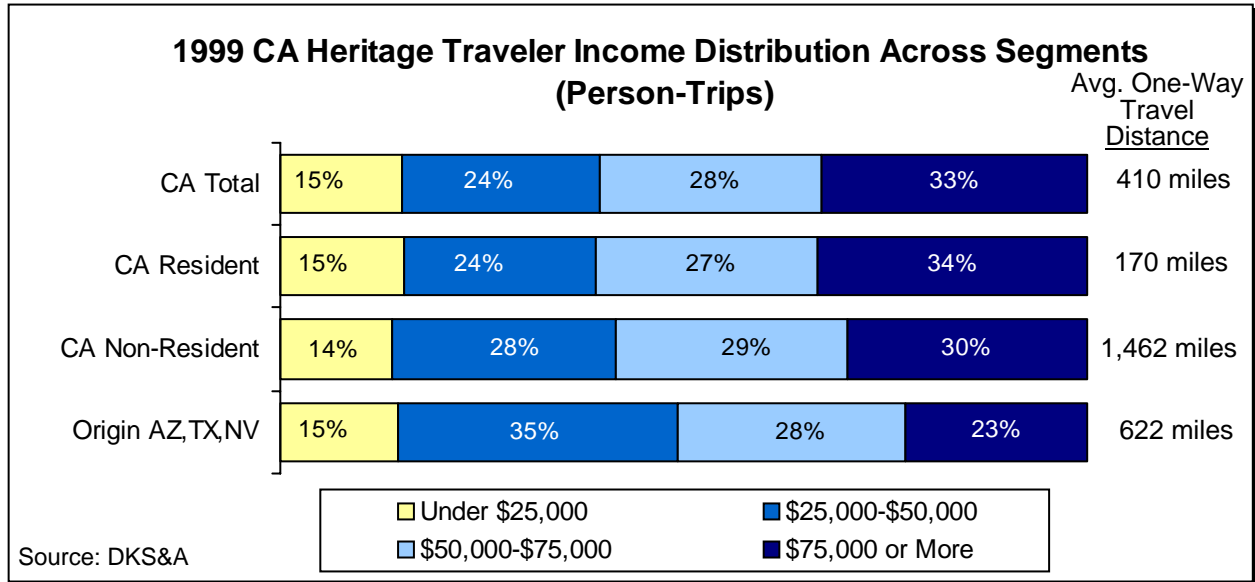


- Those Heritage travelers who visited California Historic Sites traveled the longest one-way distance (516 miles, down 58 miles from 1998).
- Those who Visited National/State Parks traveled the second furthest one-way distance of 478 miles. It is interesting to note that Parks travelers traveled further distances than Cultural travelers (394 miles), but had a lower share of travel by Air (10% vs 14%, respectively).



California Heritage Tourism

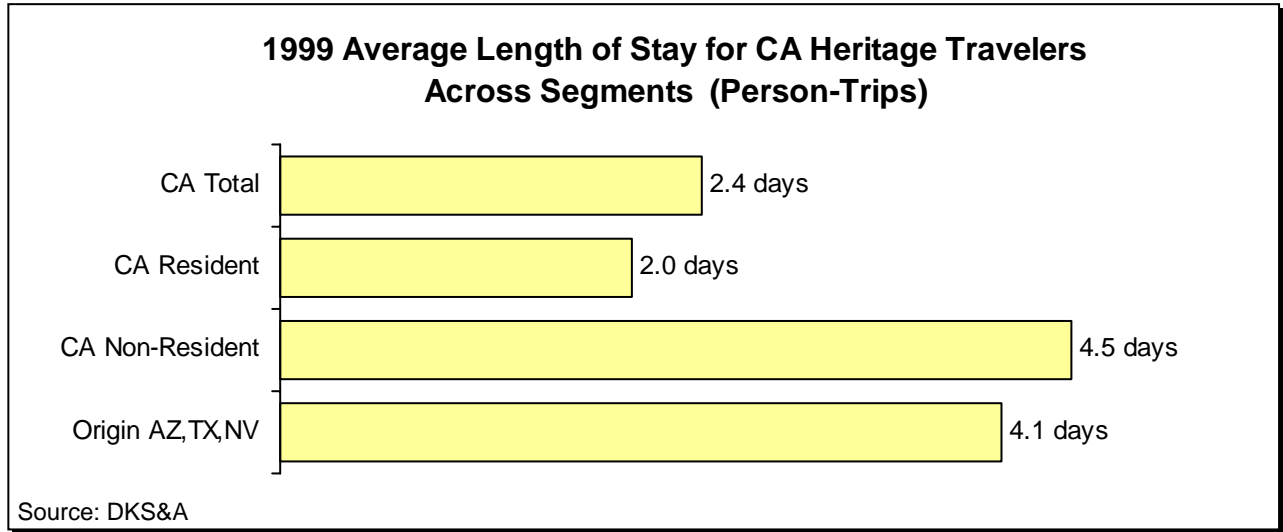
One-Way Travel Distance Distribution



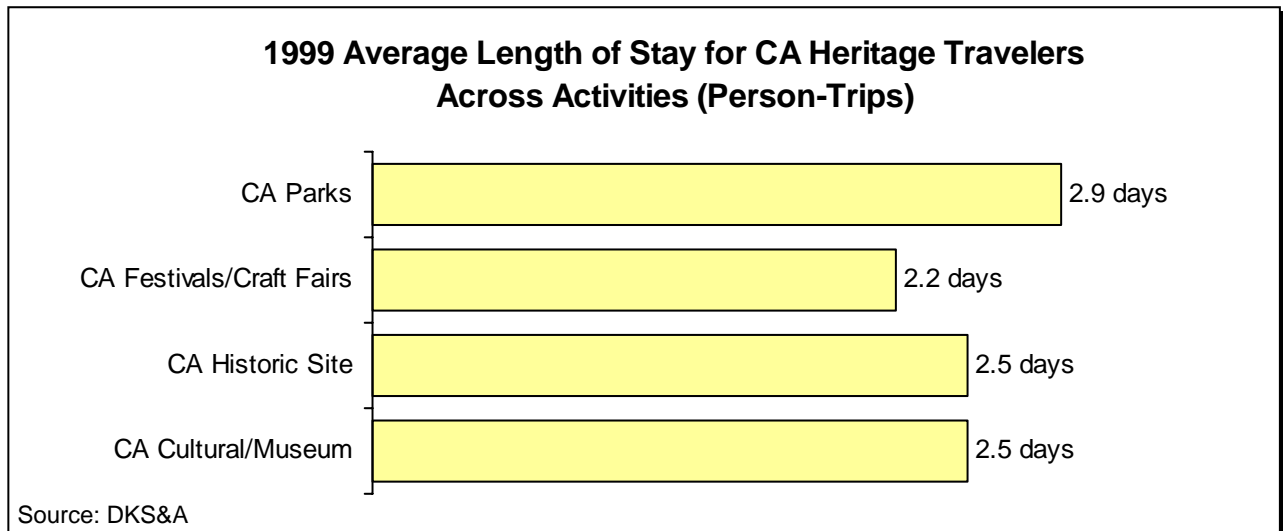
California Heritage Tourism

Average Length of Stay – **The Average Heritage Traveler Stayed 2.4 Days on Their Trip**

- The average California Heritage traveler stayed 2.4 days on their trip in 1999. Non-Resident stays were much longer, with an average of 4.5 days.



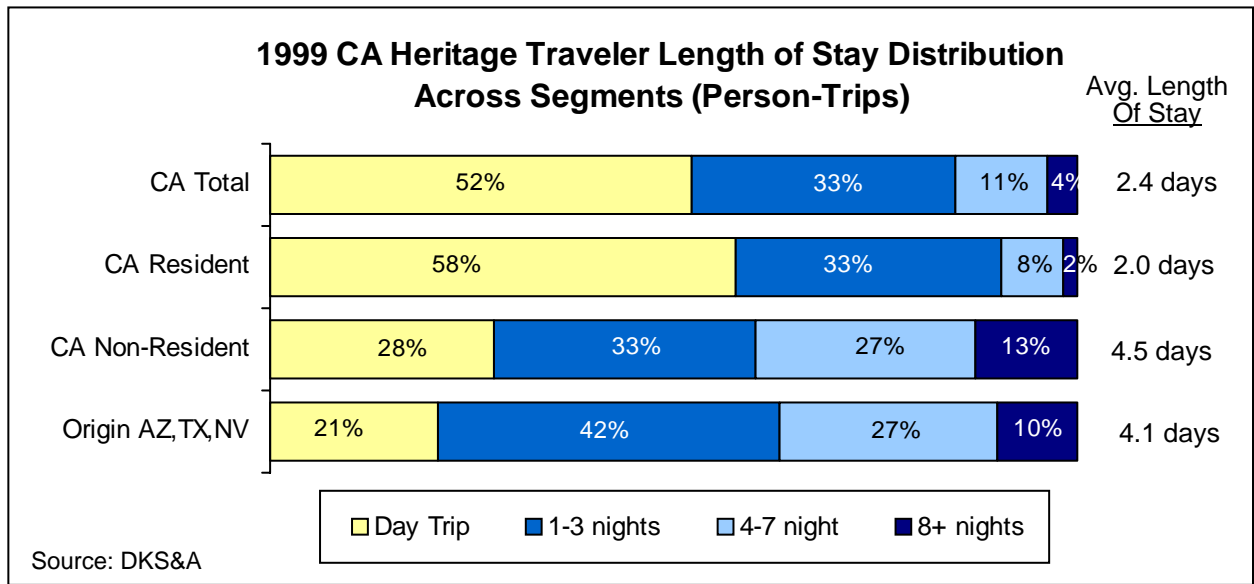
- California Heritage travelers who Visited National/State Parks stayed the longest, on average, with an average stay length of 2.9 days. This longer stay length likely reflects a high share of Campers.



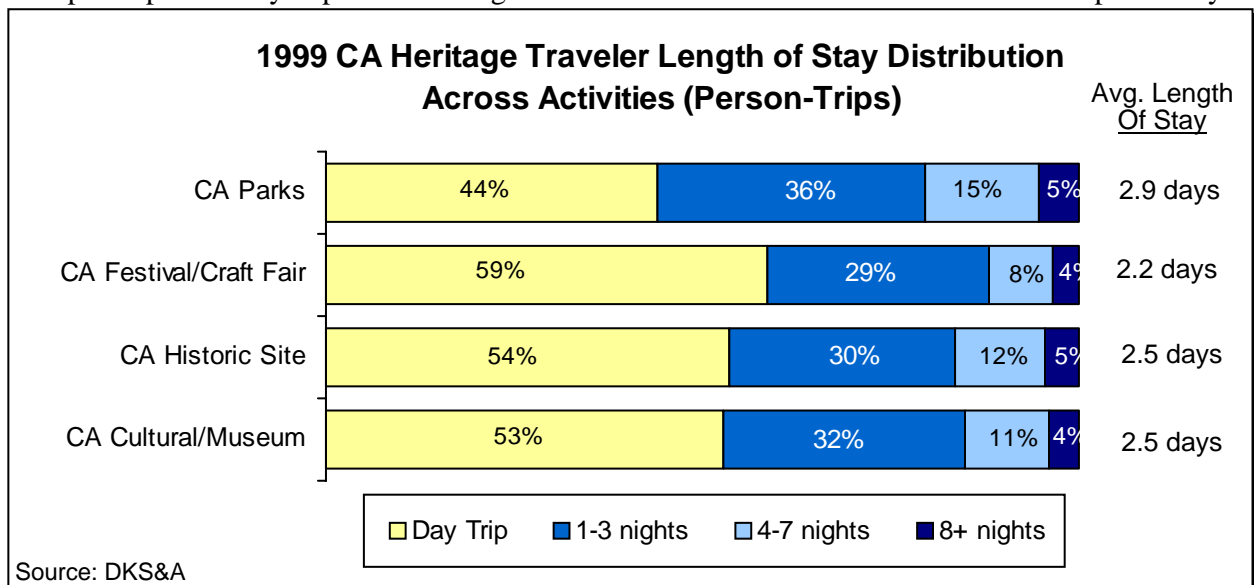
California Heritage Tourism

Length of Stay Distribution – Day-Trip Travel Rose for Resident and Non-Resident Heritage Travelers

- Over half (58%) of all Resident Heritage travelers were on a Day-Trip when they participated in a Heritage activity in 1999, up 4 percentage points from the previous year (54%). Day-Trip travel by Non-Resident Heritage travelers also rose, up 4 percentage points to 28% in 1999.
- Conversely, Heritage travelers from California’s Top Origin markets of Arizona, Texas, and Nevada were less likely in 1999 to take a day-trip to the state, down 7 percentage points to 21% in 1999.



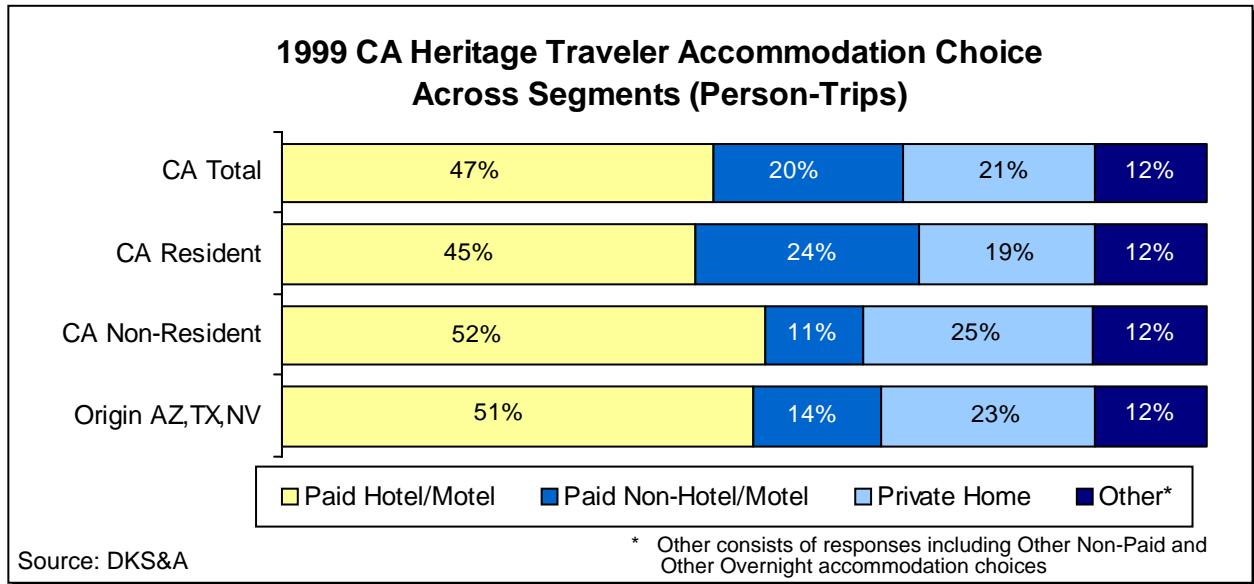
- The share of Day-Trip travel by travelers from most of the Heritage activity groups increased between 1998 and 1999. Share of Day-Trip travel by National/State Park visitors increased 9 percentage points, by 6 percentage points among Historic Site visitors, and by 5 percentage points among Festival/Craft Fair participants. Day-trip travel among Cultural travelers remained consistent with the previous year.



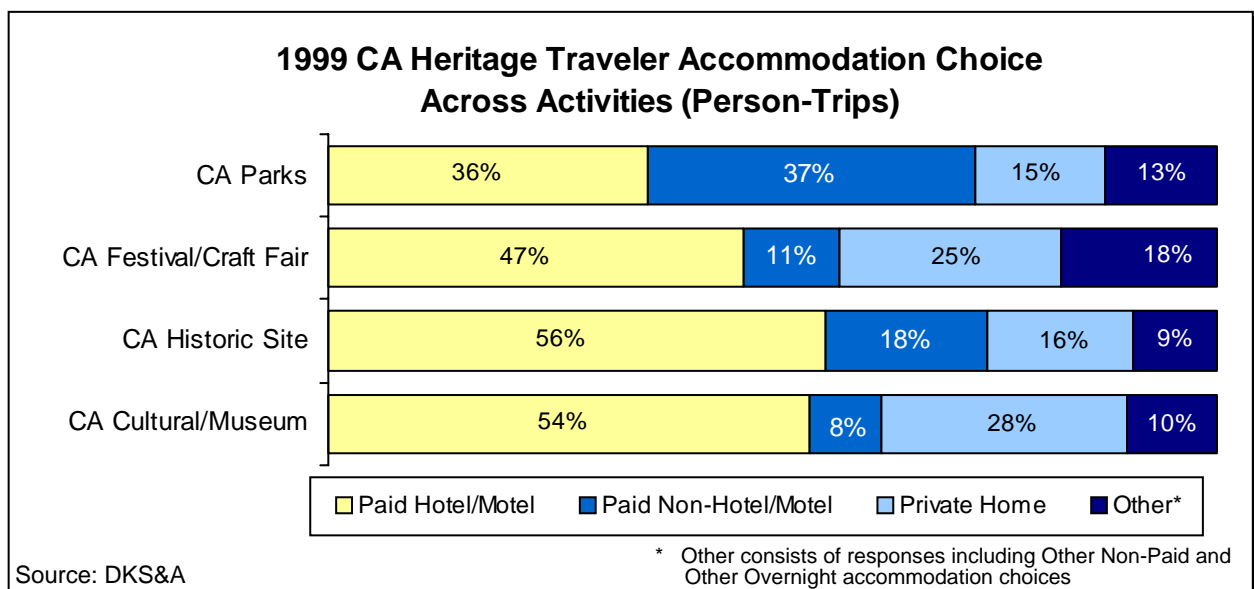
California Heritage Tourism

Accommodation Choice Distribution – Share of Stays in Paid Accommodations Declined

- Almost half (47%) of all California Heritage travelers stayed in Paid Hotel/Motel accommodations in 1999, down 2 percentage points from the previous year.
- The share of Private Home stays by Non-Resident Heritage travelers increased from 23% in 1998 to 25% in 1999, despite a 9 percentage point decline in Non-Resident VFR travel.



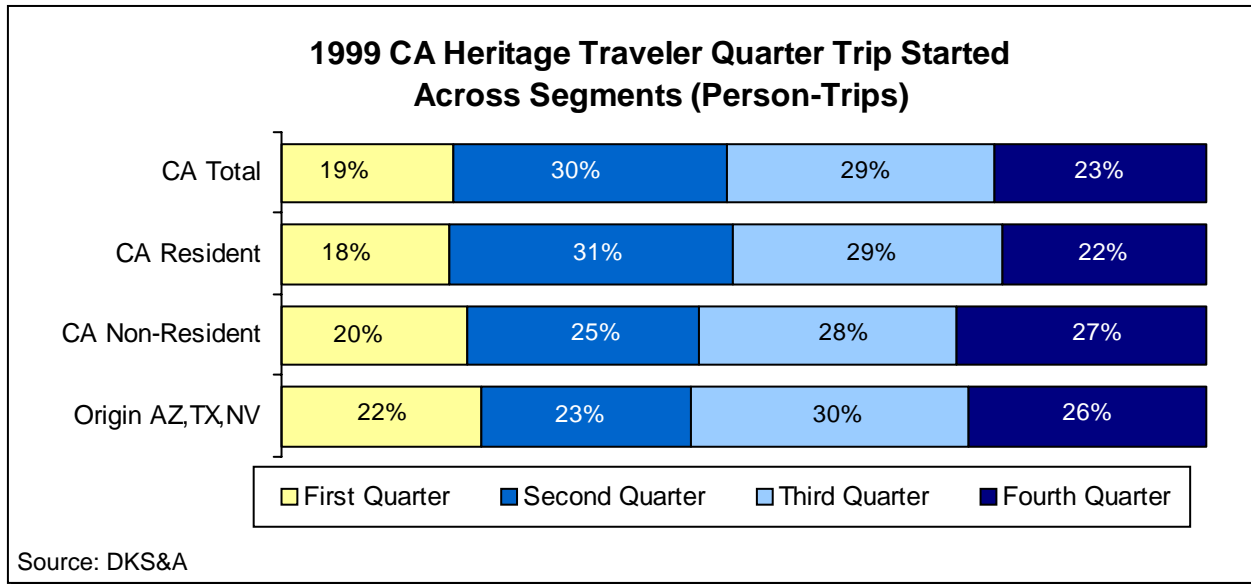
- Heritage travelers who visited Historic Sites were the most likely to stay in a Paid Hotel/Motel accommodation (56%) among the various Heritage activity groups. Conversely, those who visited National/State Parks were the least likely to stay in a Paid Hotel/Motel accommodation (36%). This relatively lower share of hotel/motel stays was counter-balanced by a high share of stays in Paid Non-Hotel/Motel accommodations (37%), likely an indication of camping.



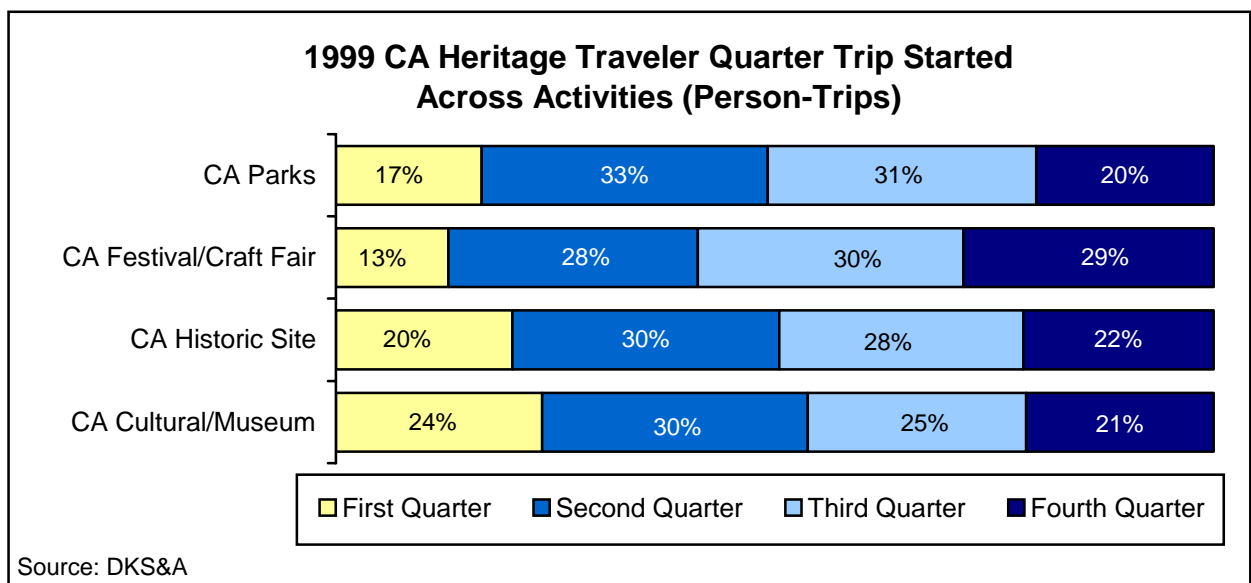
California Heritage Tourism

Quarter Trip Started – Second and Third Quarters Were the Most Popular Travel Quarters for Heritage Travel Overall

- The Third Quarter experienced significant decreases in travel among all California Heritage travel segments, with the largest decrease in share from the Top Origin markets of Arizona, Texas, and Nevada (down 15 percentage points from 1998). Countering this large decrease was a 10 percentage point increase in travel during the First Quarter and an 8 percentage point increase in travel during the Fourth Quarter among Heritage travelers from the Top Origin markets.



- The majority of Heritage travel among the Heritage activity groups occurred during the second and third quarters of 1999.
- Share of Heritage travel declined in the Third Quarter across each of the activity groups from the previous year.

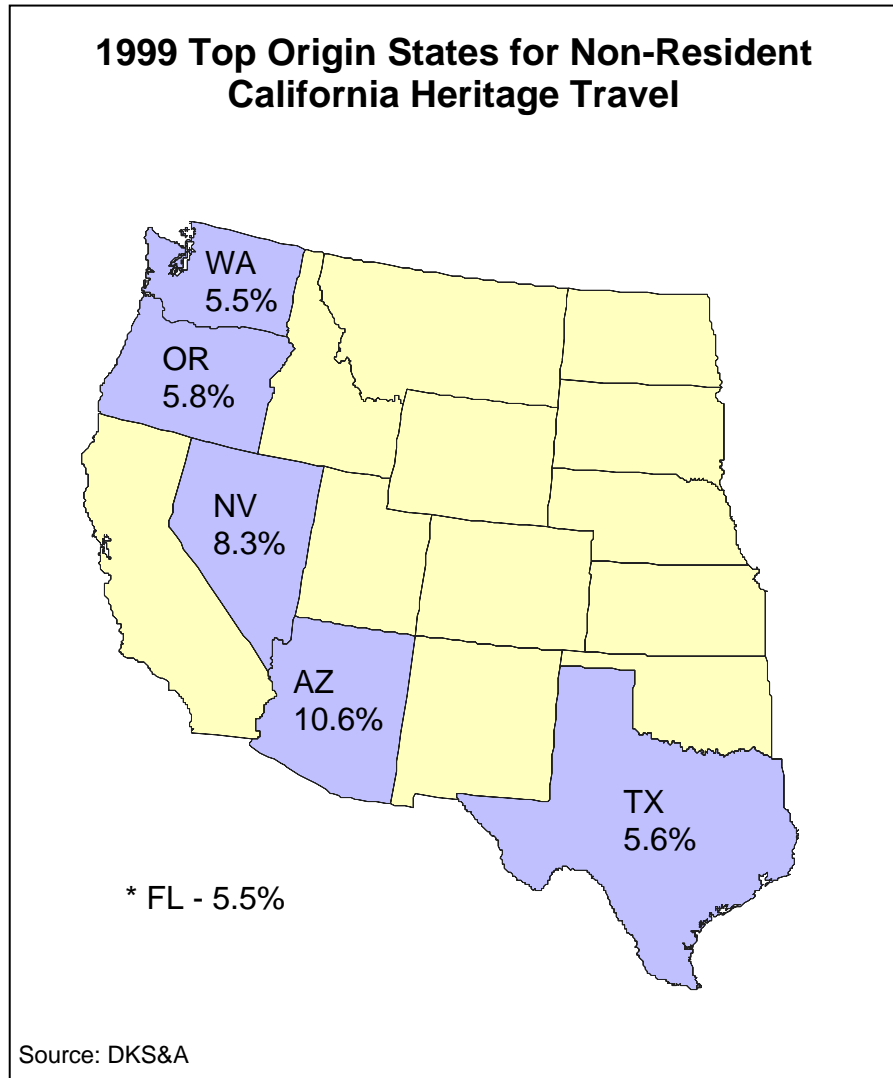


Communicating

California Heritage Tourism

Top Origin States – Resident Travel Dominated the California Heritage Marketplace

- California Resident Heritage travel accounted for 81.4% of its total Heritage market in 1999.
- Among Non-Resident Heritage travelers, the majority came from the states of Arizona, Nevada, Oregon, Texas, Florida, and Washington.

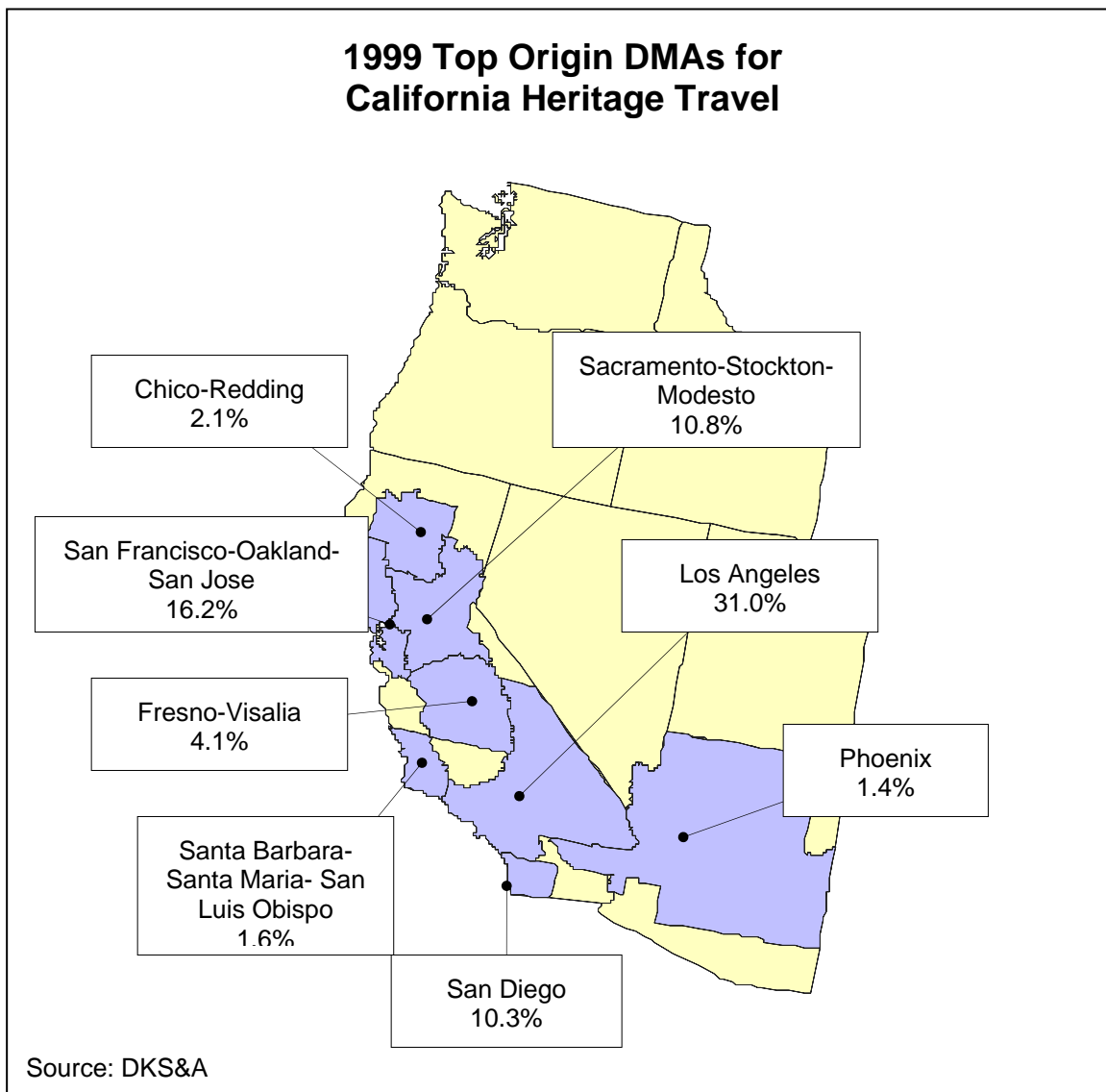


California Heritage Tourism

Top DMA Markets – **Los Angeles DMA was the Top Feeder Market**

*DMA*s are designated market areas defined by Nielsen that are typically used by marketers to select the best markets in which to place advertisements (e.g. TV, radio, print, etc.).

- The Los Angeles DMA provided the highest share (31%) of California's Heritage travelers of all origin DMAs. The San Francisco-Oakland-San Jose and the Sacramento-Stockton-Modesto DMAs provided the next highest shares (16.2% and 10.8%, respectively), followed closely by the San Diego DMA (10.3%, up 3 percentage points from 1998).



Appendices

Multi-Response Activity Overlap By Stay in California 1998 and 1999

	<u>1999</u>	<u>1998</u>
Visit Historic Site and...		
National/State Park	27.5%	22.9%
Attend Festival/Craft Fair	9.3%	8.4%
Cultural (museum/play/concert)	23.1%	26.7%
Visit National/State Park and...		
Visit Historic Site	30.2%	25.6%
Attend Festival/Craft Fair	5.4%	5.4%
Cultural (museum/play/concert)	12.6%	16.2%
Attend Festival/Craft Fair and...		
Visit Historic Site	10.8%	10.7%
Visit National/State Park	5.7%	6.2%
Cultural (museum/play/concert)	23.5%	21.6%
Cultural (museum/play/concert) and...		
Visit Historic Site	17.5%	22.5%
Visit National/State Park	8.7%	12.2%
Attend Festival/Craft Fair	15.4%	14.1%

Year End 1999 Economy in Review

In Year End 1999, the Economy (Real GDP) grew at a rate of 3.9 percent. The Consumer Confidence Index was up, the inflation rate decreased since last year, and the unemployment rate went down.

Change in Leading Economic Indicators:

GDP ¹ :	Real GDP growth for Year End 1999 was 3.9 percent this year – unchanged from last year. (Real GDP reflects constant-dollar value of goods and services produced by labor and capital located within the U.S.).
Inflation ² :	The inflation rate was 1.6 percent in Year End 1999, down from last year (1.7%).
Consumer Confidence ³ :	The Consumer Confidence Index for Year End 1999 was 131.7, an increase from last year (125.2).
Unemployment ² :	The unemployment rate for Year End 1999 was 4.5 percent, a decrease from last year (4.9%).

References: (1) Department of Commerce, Bureau of Economic Analysis,
(2) The Department of Labor, Bureau of Labor Statistics,
(3) The Conference Board, Inc.,
(4) GDP data is taken from the February 1999 Leading Economic Indicators.

YEAR END 1999 REVIEW OF MAJOR EVENTS

FIRST QUARTER 1999

- 1/12 Renaissance rated best hotel chain in a study of upscale hotel guests.
- 2/25 The Consumer Confidence Index hit a thirty-year high in February. (138.3)
- 2/27 Pan American World Airlines filed for bankruptcy, and ceased operations.
- 3/4 Las Vegas retains its position as the hotel capital of the U.S., with 106,000 rooms.
- 3/18 Gasoline prices fell an average of 21 cents to their lowest in four years.

SECOND QUARTER 1999

- 4/10 Showing the first signs of merger pains, several top executives at Cendant Corp. resign.
- 4/17 Accounting irregularities uncovered by Cendant Corp., cause a 46% drop in Cendant stock.
- 6/4 The nation's fastest passenger train derails near Hanover, Germany, killing up to 120 people.
- 6/17 Cables being strung to keep Leaning Tower of Pisa from falling over.
- 6/30 A record 108.4 million U.S. adults are expected to take a family vacation this year, an increase of 4% over 1997.

THIRD QUARTER 1999

- 7/1 Consumer Confidence hits a 29-year high.
- 7/24 U.S. companies spend about \$1.4 million on business travel, a 75% increase over 1996.
- 8/12 The U.S. has temporarily suspended operations at about half a dozen embassies because of increased threats of terrorism.
- 9/3 AH&MA Lodging profile shows that 1997 was the most profitable year ever for the lodging industry.
- 9/15 The U.S. is in the midst of a "gasoline price depression," with inflation-adjusted gas prices at virtually their lowest level in history.

FOURTH QUARTER 1999

- 10/8 American Airlines faces a pilot shortage and has canceled some flights amid a wave of early retirement by pilots.
- 10/22 Travelers pay more than \$71 billion in travel-related taxes but a new report released by TIA finds that most travel tax revenue is not spent on programs that benefit the travelers who are paying them.
- 10/28 Consumer confidence drops to 2-year low. The confidence of U.S. consumers slid sharply in October to its lowest level in almost 2 years, deepening concern about an emerging slowdown in the national economy.
- 11/9 American Airlines said that it planned to slow its growth in 1999 by retiring 10 aircraft earlier than expected and by deferring service on some new international routes.
- 11/25 Walt Disney World has given union workers a take-it or leave-it contract offer.

D.K. SHIFFLET & ASSOCIATES LTD
DIRECTIONS® PERFORMANCE/MONITOR
SURVEY QUESTIONS

Sample Contacted Annually: 540,000 Households
45,000 Per Month - Every Month - Year After Year

[Unless Otherwise Identified,
Each Measure Generally Available By Month Back To 1991 Or Earlier]

1. **Age** of Respondent [Open End/Actual]
Gender of Respondent Male Female
2. **Travel CLUBS:** List your Frequent traveler programs and travel club memberships,
(name of airlines, hotels, rental cars, auto club: AAA, etc; AARP). [Open
End/Coded]
[List up to 6]

LAST 12 MONTHS TRAVEL

3. In **last 12 months**, number of nights you stayed in **paid accommodations**
(e.g., hotel, condo, ship, campground) for:
- Business:** Number of Nights [Open End/Actual]
Leisure: Number of Nights [Open End/Actual]
4. In **last 12 months**,
- Number of **Airline Trips** [Open End/Actual]
Number of times **Rented Car** [Open End/Actual]
Available since 10/92
Number of times to **Theme Parks** [Open End/Actual]
Available since 6/96

LAST THREE MONTHS TRAVEL

TRIP DEFINITION: Any **Day-Trip** out of your local area (50+ miles one way), OR any **Night Away** from home (local or distant)

5. Using the above definition of "Trip," in **the Last Three Months** did you go on any "trip"

- Yes (Go to Question 6)
- No (Return Questionnaire)

6. **Answer questions below for each of your trips in the past 3 months**
(Months and Year Listed)

6A. **TRIP**

- **Trip Start** Month and Date [Open End/Actual]
- **Number of Nights** on Trip ("0" if day trip) [Open End/Actual]
- **PURPOSE of Trip:** 1- Business 2- Leisure 3- Both

6B. **Travel PARTY COMPOSITION**

- Number Men [Open End/Actual]
- Number Women [Open End/Actual]
- Number Kids Age 0-17 [Open End/Actual]
- Number From Your Household [Open End/Actual]

6C. **TRANSPORTATION**

- **MAIN Type** of Transportation:
 - 1- Airline 4- Greyhound Bus 7- Camper/RV 10- Other
 - 2- Amtrak Train 5- Other Bus 8- Van/Small Truck
 - 3- Other Train 6- Car 9- Large Truck
- Used **TRAVEL AGENT** for Transportation: Yes No
Available since 10/92

AIRLINE

- If used Airline: **NAME OF AIRLINE** used [Open End/Coded]

Airline RATINGS

- **Overall**
Rating: 1-10 Scale (1= Poor, up to 10 = Excellent)
Available since 8/91
- **Value**
Rating: 1-10 Scale (1= Poor, up to 10 = Excellent)
Available since 10/92
- **HOW PAID for Airline Ticket**

1- Cash/Check	5- Discover
2- American Express	6- Diners Club
3- MasterCard	7- Other Card
4- VISA	8- Company Direct Bill

Available since 7/96

RENTAL CAR

- If used Rental Car: **NAME OF RENTAL CAR Company** [Open End/Coded]

Rental Car Co. RATINGS

- **Overall**
Rating: 1-10 Scale (1= Poor, up to 10 = Excellent)
Available since 8/91
- **Value**
Rating: 1-10 Scale (1= Poor, up to 10 = Excellent)
Available since 10/92
- **HOW PAID for Rental Car**

1- Cash/Check	5- Discover
2- American Express	6- Diners Club
3- MasterCard	7- Other Card
4- VISA	8- Company Direct Bill

Available since 7/96

EXPENDITURES BY CATEGORY

6D. EXPENSE DOLLARS (“0” if none)

- Main Transportation \$ *Available since 7/96* [Open End/Actual]
- Rental Car \$ *Available since 7/96* [Open End/Actual]
- Total Transportation \$ - including air, car, gas, etc. [Open End/Actual]

- Food/Drink \$ [Open End/Actual]
- Entertainment/Recreation \$ [Open End/Actual]
- All Shopping \$ [Open End/Actual]

- All Other \$ Except Accommodations [Open End/Actual]

VISIT TO EACH CITY

7. Questions below are for EACH DAY TRIP and EACH OVERNIGHT STAY (One per line)

7A.1 WHERE

- **City**, State (e.g. Miami, FL)
If out of U.S., write city and country. [Open End/Coded]

7A.2 DISTANCE TRAVELED (Calculated by Latitude/Longitude)

7B. CITY RATINGS

- **Overall**
Rating: 1-10 Scale (1=Poor, up to 10=Excellent)

- **Value**
Rating: 1-10 Scale (1=Poor, up to 10=Excellent)
Available since 10/92

- **VISITED CITY BEFORE** in Last 3 Years? (*Available since 5/96*)

7C. Start DATE of Visit to City: Month and Date [Open End/Actual]

7D. **PURPOSE Of Stay** in City

- **Company Business**
 - 1- Convention
 - 2- Seminar/Training
 - 3- Other Group Meeting
 - 4- Sales/Consulting
 - 5- Government/Military
 - 6- Other Business
- **Leisure/Personal**
 - 7- Getaway Weekend
 - 8- General Vacation
 - 9- Visit Friend/Relative
 - 10- Special Event
 - 11- Other Personal
- **Stopover In-Route** Yes No

7E. **ACTIVITIES**

- List primary activities for each stay: [List up to 4]
 - 1- Snow Ski
 - 2- Play Golf
 - 3- Boat/Sail
 - 4- Beach/Waterfront
 - 5- Hike, Bike, etc.
 - 6- Hunt, Fish, etc.
 - 7- Watch Sports Events
 - 8- Gamble
 - 9- Visit Historic Site
 - 10- Theme/Amusement Park
 - 11- Parks: National, State, etc.
 - 12- Shows: Boat, Auto, Antique, etc.
 - 13- Festival, Craft Fair, etc.
 - 14- Cultural: Museum, Play, Concert
 - 15- Touring by Auto, Bus, etc.
 - 16- Camping (Captured as Accommodation Type)
 - 17- Group Tour (Separate Question)
 - 18- Entertainment (Expenditure-Based)
 - 19- Shopping (Expenditure-Based)
 - 20- Dining (Expenditure-Based)

Available since 5/94

7F. **Number of nights in city** ("0" if day trip) [Open End/Actual]

7G. **PLACE STAYED**

- **Name** of hotel/motel, shipline, etc. (Use both the individual hotel name and the hotel chain name)
If friend/relatives' home, use "friend." [Open End/Coded]
- **Stayed Before** in this building: Yes No
- **Suite Room:** Yes No

ACCOMMODATIONS

7H. **LOCATION** of accommodations:

- | | |
|-------------|---------------------|
| 1- Airport | 5- Small Town |
| 2- Downtown | 6 - Government Park |
| 3- Suburban | 7 - Ship |
| 4- Highway | 8 - Other |

7I. **TYPE** of accommodation:

- | | |
|--------------------------|--------------------|
| 1- "All suite" Hotel | 5- Bed & Breakfast |
| 2- Resort Hotel | 6- Ship or Cruise |
| 3- Hotel/Motel | 7- Private home |
| 4- Condominium/Timeshare | 8- Other |

7J. How were **RESERVATIONS** made for accommodations:

- | | |
|-----------------------|--|
| 1- No Reservation | 5- Travel Agent |
| 2- 800 phone Number | 6- Computer/On-Line (Available since 2/96) |
| 3- Direct to location | 7-Other |
| 4- Corp. Travel Dept. | |

7K. **IN-ROOM COMPOSITION:** Who and how many STAYED in room:

- | | |
|--------------------------------|-------------------|
| Number Men | [Open End/Actual] |
| Number Women | [Open End/Actual] |
| Number Children 0-17 years old | [Open End/Actual] |

7L. **RATINGS**

- **OVERALL** - with accommodations: 1-10 Scale
- **VALUE** - of accommodations: 1-10 Scale
- **SERVICE** at accommodations: 1-10 Scale

7M. PAYMENT For Accommodations

▪ **WHO** Paid for accommodations:

- | | |
|-------------------------|-------------|
| 1- Self/Friend/Relative | 4- Per Diem |
| 2- Expense Account | 5- Free |
| 3- Company Direct Bill | |

▪ **HOW Paid** for accommodations: ("0" if free)

- | | |
|---------------------|------------------------|
| 1- Cash/Check | 5- Discover |
| 2- American Express | 6- Diners Club |
| 3- MasterCard | 7- Other Card |
| 4- Visa | 8- Company Direct Bill |

7O. **DOLLARS PER NIGHT** (Room Only) [Open End/Actual]

7P. Was price paid a **Special DEAL** Yes No

DEMOGRAPHICS

8A. **Number of Persons in Household** [Actual]

8B. **Annual Household INCOME:**

- | | |
|-----------------------|-------------------------|
| 1- Less than \$7,500 | 11- \$30,000-\$32,499 |
| 2- \$7,500-\$9,999 | 12- \$32,500-\$34,999 |
| 3- \$10,000-\$12,499 | 13- \$35,000-\$39,999 |
| 4- \$12,500-\$14,999 | 14- \$40,000-\$44,999 |
| 5- \$15,000-\$17,499 | 15- \$45,000-\$49,999 |
| 6- \$17,500-\$19,999 | 16- \$50,000-\$59,999 |
| 7- \$20,000-\$22,499 | 17- \$60,000-\$74,999 |
| 8- \$22,500-\$24,999 | 18- \$75,000-\$99,999 |
| 9- \$25,000-\$27,499 | 19- \$100,000-\$124,999 |
| 10- \$27,500-\$29,999 | 20- \$125,000+ |

8C. **OCCUPATION of Adult Heads of Household:**

- | | |
|-------------------------------------|----------------------|
| 1- Managerial/Professional | 6- Operator, Laborer |
| 2- Technical, Sales, Admin. Support | 7- Student, Other |
| 3- Service | 8- Retired |
| 4- Farming, Forestry, Fishing | 9- Not Employed |
| 5- Craftsman, Repairman | |

8D. EDUCATION of Adult Heads of Household:

- | | |
|---------------------------|----------------------------|
| 1- Attended Grade School | 5 - Attended College |
| 2- Graduated Grade School | 6.- Graduated College |
| 3- Attended High School | 7. - College Post Graduate |
| 4- Graduated High School | |

8E. MARITAL STATUS of Head of Household:

- 1- Married 2- Never Married 3- Divorced/Widowed/Separated

8F. GENDER of All Persons in Household: 1- Male 2- Female

8G. AGE of All Persons in Household [Actual]

8H. Children in household: [Actual Number, Age and Gender]

8I. LOCATION of household: State, DMA, ZIP Code, MSA, County

8J. PRIZM coded respondents to block level address
All can be linked to Claritas PRIZM/Clusters and other databases
Available to clients as special purchase.

Additionally,

Several INTERACTIVE MEASURES AND MODELS Are Generated. Examples:

Airline Profile Analyses by Brand, Route and Distance

Rental Car Profile Analyses by Brand and Markets

Hotel Profile Analyses by Brand, Type, Segment and Markets

Credit Card Profile Analyses by Brand and Type of Expenditure

City Profile Analyses By Traveler Purpose

Feeder Market (Origin/Destination) Analyses

Target Opportunity Model

Traveler Analyses by Type (Frequent Business, Leisure, Female Business, etc.)

Traveler **Clusters**

"Frequent Traveler Clubs" Analyses

Positioning Leverage Model

Media Leverage Model (Origin/Destination per 1000)

Media Planning Model (Media Used by Target Cluster by Feeder Market)

Plus: Several Custom Tabulations and Proprietary Modeling Procedures