



Emotional Connection in Destination Marketing: Visit California's Brand Evolution to the Ultimate Playground

GWTTRA, Oct 26, 2023



1. Brand Health: Taking Stock of the California Brand

California Brand Evolution

Find Yourself Here

California Lifestyle

Dream Big

Promise of possibility, living life to fullest, Dream Big

Dream Big 2.0

Since 2017, leaning more towards celebrating diversity, inclusiveness

2023-2024

?



California Brand DNA

Where you are inspired to dream big

A place where anything is possible

Where people live life to the fullest

Where you can be yourself

Celebrates diversity

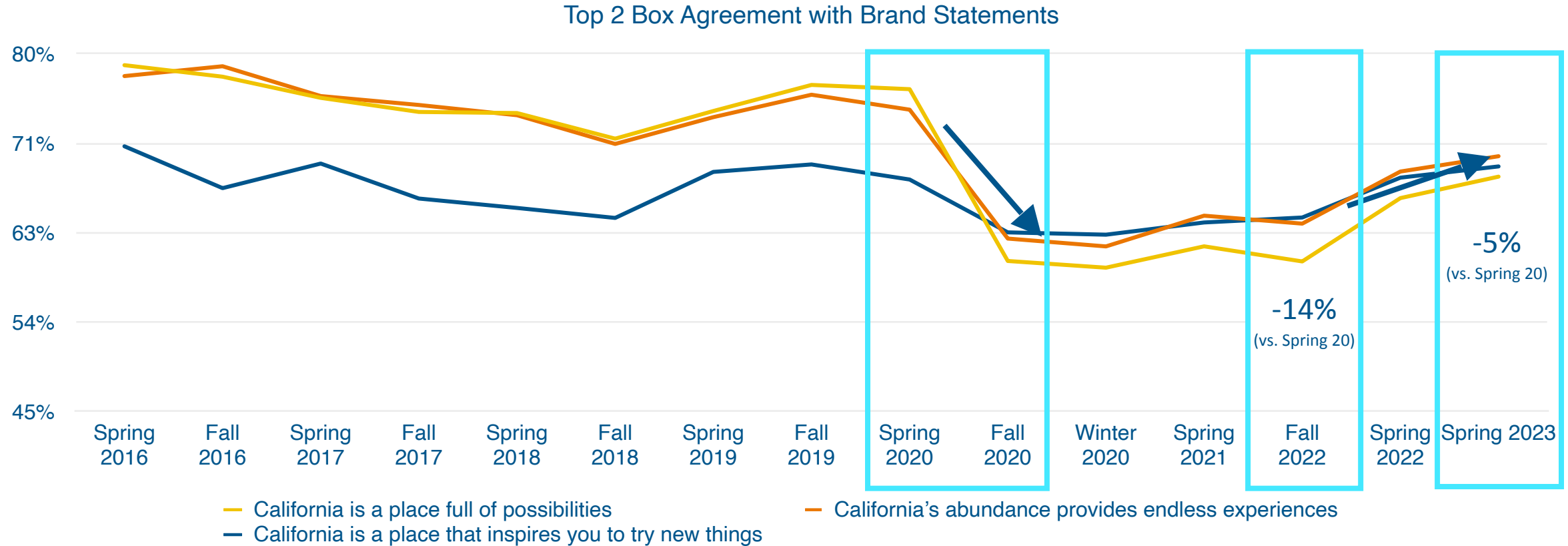
Fun and free-spirited

Inspires you to try new things




Cares about the environment

A place with a welcoming culture

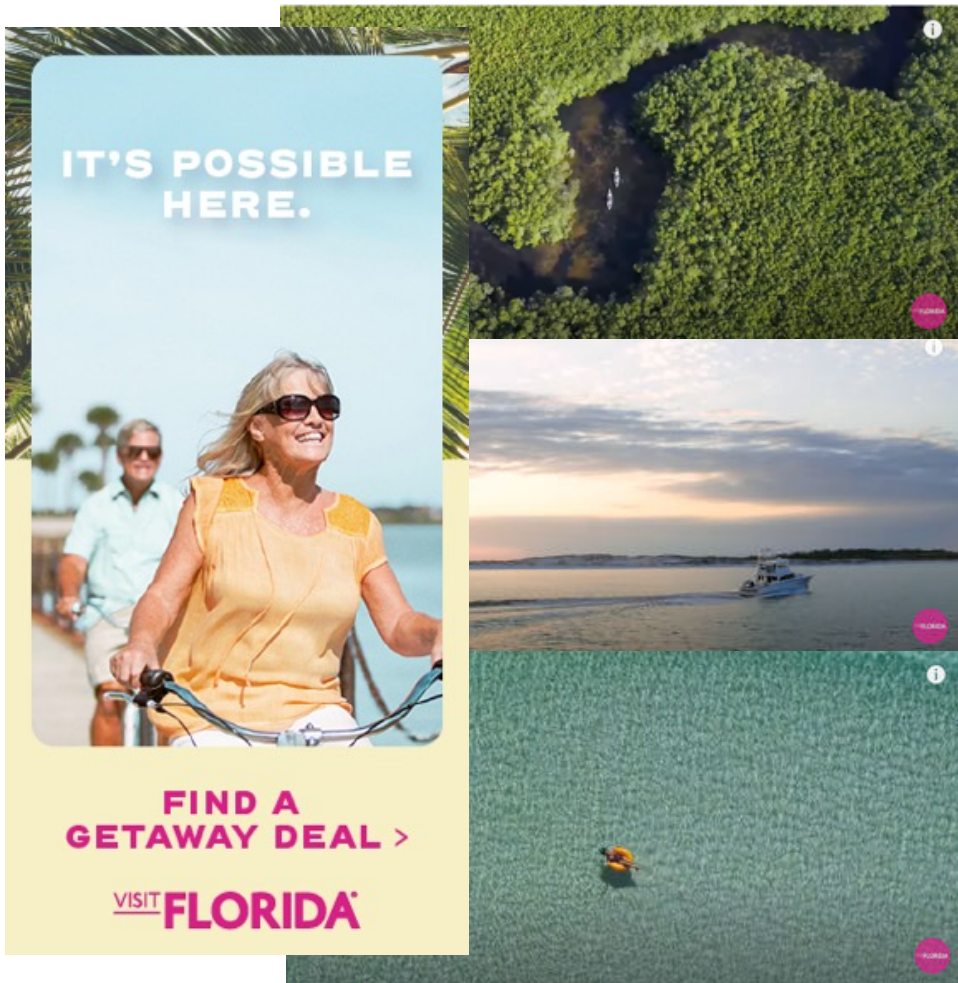
Brand Tarnish Over Time



California brand strength has shifted

	2019 Rank	2022 Rank	Change in Rank	
A place that celebrates diversity	1	1	0	
A place that is fun and free-spirited	2	2	0	
A place where you can be yourself	8	3	+5	
A place that inspires you to try new things	4	4	0	
A place where you are inspired to dream big	3	5	-2	
A place that cares about the environment and our natural resources	6	6	0	
A place where people live life to the fullest	5	7	-2	
A place where anything is possible	6	7	-1	
A place with a welcoming culture	9	9	0	

Competitive analysis found “Anything possible” space becoming crowded...



Voice over to long form video (2021) YouTube and on Homepage:

It's time to let yourself explore the wide open beauty of FL, Castaway your stress and soak up some peace of mind.

Try something new...like this, or this, or what's this?

Enjoy a little freedom, a touch of spontaneity

And lots and **lots of sunshine**

Make each day shine exactly the way its supposed to

Whatever getaway you are imagining, you can make it real here.

Because in Florida it's possible

Dream Big 2.0

California has always been a magnet for dreamers and their dreams. No place welcomes the promise of possibility — of being, living, loving, exploring and experiencing — more than California.

Here, California's creative, free-spirited, fun-loving, anything-is-possible vibe is an open invitation to all.

California is the land of boundless opportunity where individual dreams come to fuel and foster the larger community — a place where we can all Dream Big.

California Brand Health Focus Groups

Methodology

- 3 virtual group sessions
- 29 travel decision-makers with income \$50K+
- 20 states represented
- Discussion on brand image of California and competitive states



California Brand Health Focus Groups – Key Consumer Insights

- The **brand of California** and **destination/travel brand** have diverged
- Consumers were **positive about travel**
- The idea of the '**California dream**' is less believable than in the past

Implications:

1. **California wins on great experiences/diverse landscapes/abundance**
 2. Our opportunity lies in the **emotional component** of the **travel brand**
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2. Meeting Consumers Where They Are...

What is This Moment in Time?

We're on the brink of a 'polycrisis' – how worried should we be?

The World Economic Forum's [Global Risks Report 2023](#) uses the term, to explain how, "present and future risks can also interact with each other to form a 'polycrisis' – a cluster of related global risks with compounding effects, such that the overall impact exceeds the sum of each part".

In simple terms, a polycrisis describes the simultaneous and overlapping crises facing the world currently.

New study finds strong links between 'doomscrolling' and anxiety

Spending increased amounts of time on your phone can increase feelings of depression, isolation and anxiety

U.S. Surgeon General Cites Loneliness As Serious Mental Health Hazard In New Report

COVID-19 pandemic triggers 25% increase in prevalence of anxiety and depression worldwide

Wake-up call to all countries to step up mental health services and support

Top 10 Risks

“Please estimate the likely impact (severity) of the following risks over a 2-year and 10-year period”

2 years



10 years



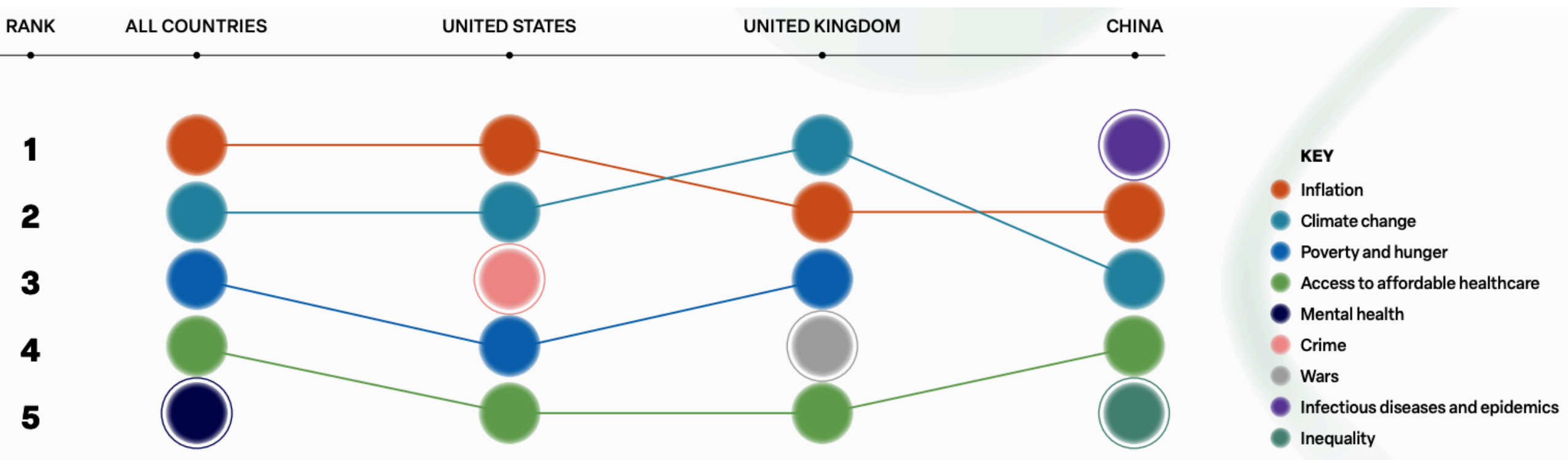
Risk categories

■ Economic
 ■ Environmental
 ■ Geopolitical
 ■ Societal
 ■ Technological

Only 25% say they are positive about the way things are going in the world

71% say they are anxious about the state of the planet

Interconnected Anxieties: Biggest problems facing the world today (top five ranking by country)



People are feeling depleted, detached, and uneasy

People seem to have less time for one another these days

85%

I am anxious about the state of the planet

71%

Technology makes us more detached from the real world

67%

I feel tired and burned out all the time

46%

I just want to feel something, to feel alive

77%

I feel there is something missing from my life

61%

I feel like life is less exciting than it used to be

58%