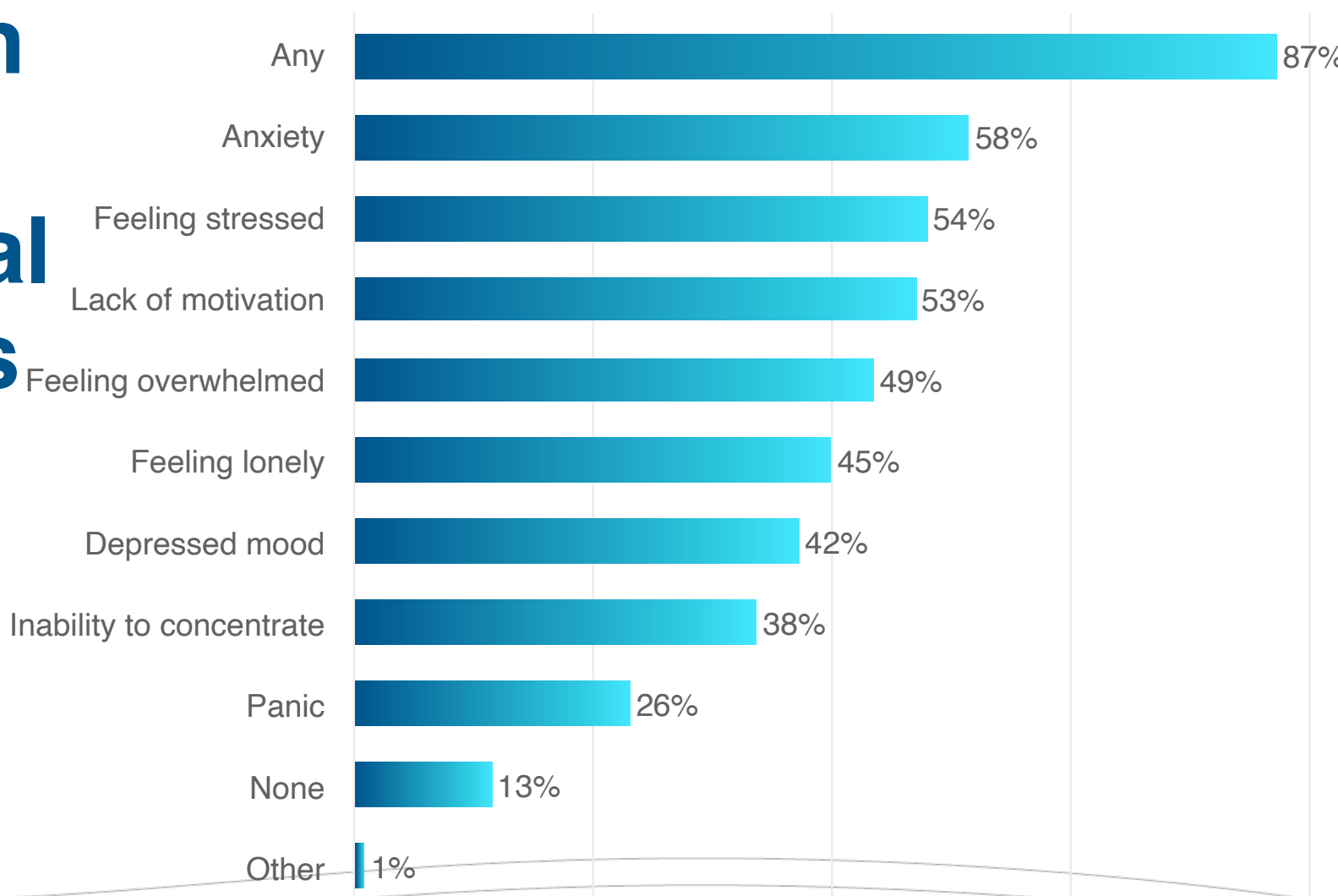


87% of U.S. youth regularly experience mental health challenges

Percentage of U.S. youth who experienced mental health challenges regularly as of 2023, by type



Consumers are yearning for...

I actively seek out experiences that bring me joy and happiness

83%

Awe-inspiring experiences make me feel more connected to the world

78%

When something is magical, it allows me to escape from the mundane

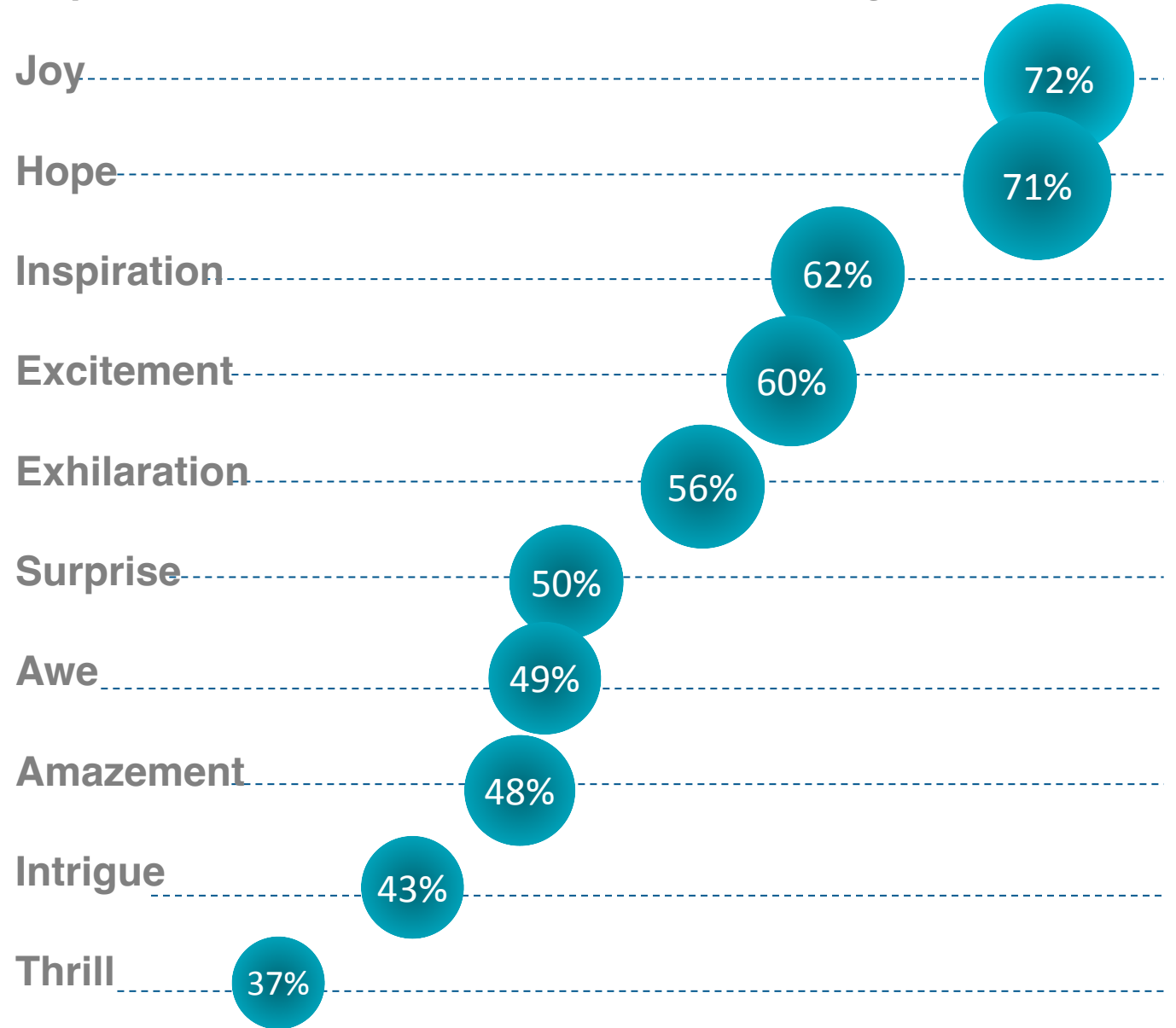
73%

I prefer to spend time in places that spark my imagination

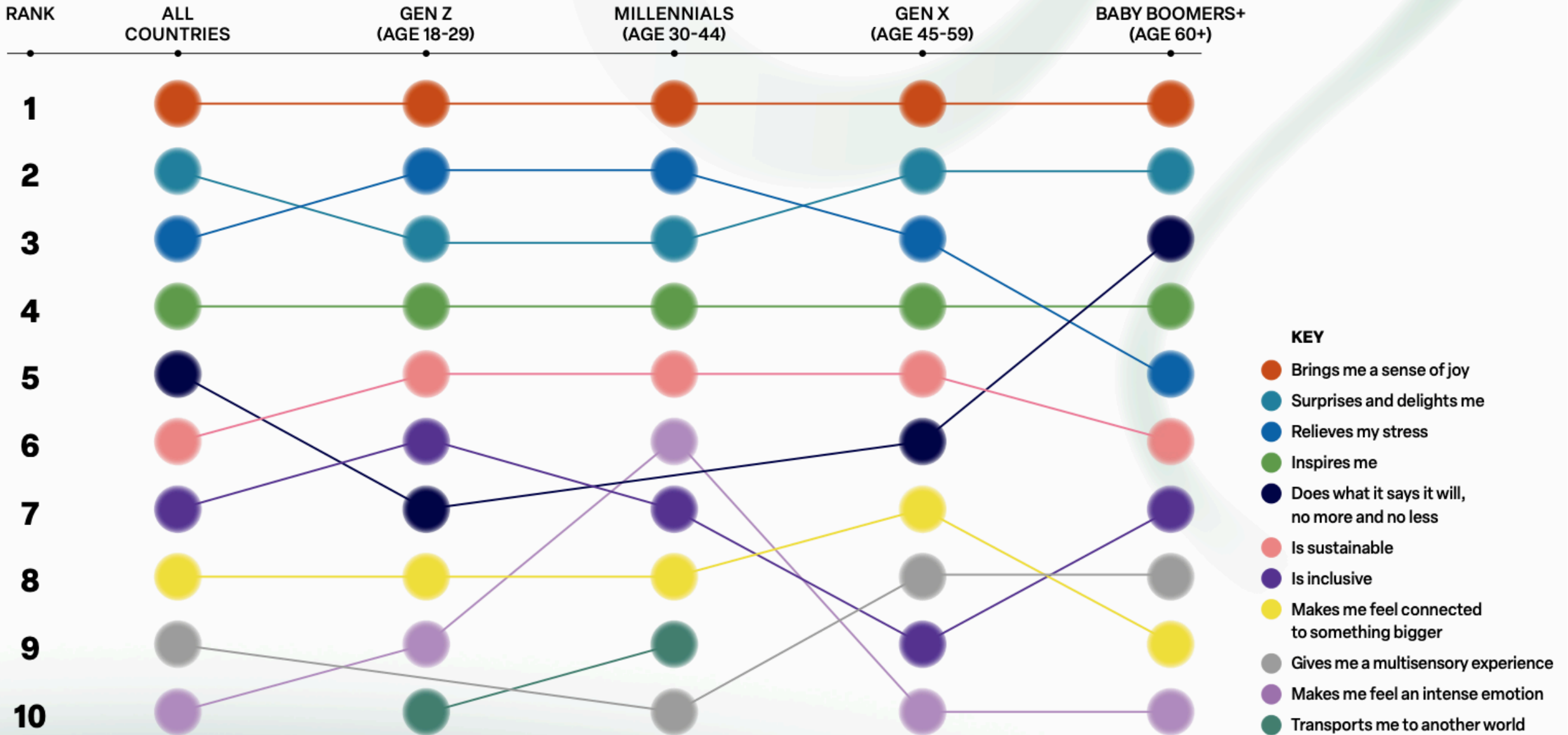
68%

And are seeking more emotion in their lives...

People want more emotion in their lives (% agree)



I'd be more likely to purchase a brand if it... (top 10 ranking by generation)





3. Evolving the California Brand Strategy

Key shifts from 2019 to 2023 reflected an evolving cultural zeitgeist



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

- Dream Big
- All Dreams Welcome
- Ultimate Playground

The research points to leaning into attributes more aligned with “being fun and free-spirited” and “a place where you can be yourself” while relying less on attributes regarding possibility. **Based on this, two variations were tested alongside Dream Big: All Dreams Welcome and Ultimate Playground**

Three platform statements tested across three dimensions

Dream Big

- California has always been a magnet for dreamers and their dreams, where anything is possible, and everyone is invited to dream big.

All Dreams Welcome

- With a free-spirited attitude that celebrates self-expression, California is up for whatever you dream up – no matter who you are or where you're from, all dreams are welcome.

Ultimate Playground

- California offers so many diverse options for fun, exploration and adventure in its 163,695 square miles, it's the ultimate playground for everyone.

Fit

- How much does this statement fit with how you think of California?

Unique

- How much does this statement show California as different or unique from other destinations?

Appeal

- How much does this statement present California as an appealing place to visit?

Ultimate Playground results

US Total

- **FIT** (+9%)
- **UNIQUE** (+6%)
- **APPEAL** (+11%)

Core & Opportunity Audiences

- **HH's with kids**
- HH's without kids
- **Millennials**
- Gen X
- Boomers
- Black
- Hispanic
- LGBTQ

International

- Canada
- Mexico
- Australia
- (within margin of error for UK)



CALIFORNIA IS THE
Ultimate Playground





CA CULTURE + CA ABUNDANCE =

PLAYFUL/OPEN-MINDED (EMOTIONAL BENEFIT)

VAST/DIVERSE OFFERING (RATIONAL BENEFIT)

THE ULTIMATE PLAYGROUND

(BRAND POSITION)

California inspires travelers to pursue playfulness in their lives.

“A California vacation/holiday encourages me to express my individual form of play...”



What's Next?

Do You Play Enough? Science Says It's Critical to Your Health and Well-Being



How to prioritize play in your life

August 19, 2023 · 4:59 PM ET

Heard on [All Things Considered](#)

New Research Shows Why Kids Need Play for Mental Health

A recent study finds links between children's lack of play and declining mental health.

AGELESS INNOVATION'S *REACH OUT AND PLAY* INITIATIVE, SPONSORED BY AARP, OFFERS A PLAYFUL SOLUTION TO COMBAT LONELINESS EPIDEMIC AND DRIVE MEANINGFUL CONNECTIONS

“There is a kind of magic in play...Play is a tremendously powerful force”

- Dr. Stuart Brown

Author of *Play: How It Shapes The Brain, Opens The Imagination, And Invigorates The Soul*
and founder of the National Institute for Play