Brand Lift Tracking Study
~Wave 1~
February 2017
Research Objectives

• Three-wave tracking survey to measure consumer awareness of recent advertising and the impact of recent advertising on likelihood to visit San Luis Obispo County for leisure/vacation travel.

This report is for Wave 1 - benchmark phase (pre-advertising).

Sampling

✓ Research Now Online Panel

✓ Total sample size: n=1498
  • 500 age 25-34/45-54 in Los Angeles area
  • 377 age 25-44 in San Francisco area
  • 167 age 25-44 in Seattle area
  • 201 age 25-44 in Las Vegas area
  • 253 age 35-54 in Phoenix area

✓ Qualification Criteria
  • Household income $75,000+
  • Plan to take at least one US leisure trip in next 12 months
  • Age 0-24 and 55+ excluded for all markets

Methodology

✓ Survey Conducted:
  • Jan 23 - Feb 6, 2017

✓ Median Length of Interview:
  • 15 minutes
Key Findings

- Two in five survey respondents (41%) have visited San Luis Obispo County in the past; overall, the Far Western states are the most visited for vacations (63%).
  - Future consideration of San Luis Obispo County is high with almost half (49%) very likely to consider traveling to San Luis Obispo County for vacation in the next 24 months.

- Nearly two in five (39%) have seen, read or heard some form of advertising about San Luis Obispo County in the past six months.
  - Most (55%) saw, read or heard about San Luis Obispo County in a social media.
  - The advertising had impact with 47% of those advertising-aware visiting San Luis Obispo County and another 39% taking steps to learn more.

- All of the tested concepts were well-received.
  - Of the three banner ads, the Kayak ad is preferred to the other two. For the videos, the Sunset video is only slightly preferred to the Cliff Road video.

- The advertising resulted in some lift in terms of creating interest.
  - The likelihood of considering travel to San Luis Obispo County in the next 24 months for vacation increased from 49% (very likely) to 52% after viewing the three banner ads and two videos.
  - The most lift occurred in the geo areas with the lowest likelihood: Las Vegas and Phoenix (+8 points).
  - The increase in likelihood is consistent with other survey findings; those who claimed they were unlikely to visit gave a lack of information about the area as their top reason (53%).

<table>
<thead>
<tr>
<th>Concept Summary</th>
<th>Banner Ads</th>
<th>Videos</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Kayak</td>
<td>Pier</td>
</tr>
<tr>
<td>Very appealing</td>
<td>51%</td>
<td>50%</td>
</tr>
<tr>
<td>Made me interested in visiting</td>
<td>51%</td>
<td>50%</td>
</tr>
<tr>
<td>Most preferred of the ads (#1)</td>
<td>43%</td>
<td>36%</td>
</tr>
</tbody>
</table>
Familiarity with San Luis Obispo County (Total Respondents)

- Never heard of it: 6%
- Heard of it but not very familiar: 29%
- Familiar but have not visited: 24%
- Have visited: 41%

Would you be interested in visiting? 
- 75% Yes

Would you be interested in visiting again? 
- 93% Yes

% Have Visited by Region
- Los Angeles: 50%
- San Francisco: 49%
- Seattle: 34%
- Las Vegas: 29%
- Phoenix: 27%

Q6. How familiar are you with San Luis Obispo County in California? 
Q7A/B. Would you be interested in visiting San Luis Obispo County in California?/Would you be interested in visiting San Luis Obispo County again?
## Familiarity with Locations in San Luis Obispo County

(*Total Respondents*)

<table>
<thead>
<tr>
<th>Location</th>
<th>Never heard of it</th>
<th>Heard of it but not very familiar</th>
<th>Familiar but have not visited</th>
<th>Have visited</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pacific Coast Highway 1</td>
<td>5%</td>
<td>16%</td>
<td>25%</td>
<td>54%</td>
</tr>
<tr>
<td>City of San Luis Obispo</td>
<td>8%</td>
<td>28%</td>
<td>28%</td>
<td>36%</td>
</tr>
<tr>
<td>Pismo Beach or Shell Beach</td>
<td>11%</td>
<td>23%</td>
<td>28%</td>
<td>36%</td>
</tr>
<tr>
<td>Morro Bay</td>
<td>20%</td>
<td>23%</td>
<td>26%</td>
<td>31%</td>
</tr>
<tr>
<td>San Simeon (Hearst Castle), Cambria, or Cayucos</td>
<td>19%</td>
<td>21%</td>
<td>30%</td>
<td>30%</td>
</tr>
<tr>
<td>Paso Robles</td>
<td>19%</td>
<td>25%</td>
<td>29%</td>
<td>27%</td>
</tr>
<tr>
<td>California Polytechnic State University (San Luis Obispo Campus)</td>
<td>13%</td>
<td>31%</td>
<td>32%</td>
<td>24%</td>
</tr>
<tr>
<td>Avila Beach</td>
<td>34%</td>
<td>20%</td>
<td>23%</td>
<td>23%</td>
</tr>
<tr>
<td>Arroyo Grande, Grover Beach, or Oceano</td>
<td>26%</td>
<td>25%</td>
<td>27%</td>
<td>22%</td>
</tr>
<tr>
<td>Atascadero, or Templeton</td>
<td>34%</td>
<td>21%</td>
<td>27%</td>
<td>18%</td>
</tr>
<tr>
<td>Edna Valley</td>
<td>39%</td>
<td>19%</td>
<td>25%</td>
<td>17%</td>
</tr>
</tbody>
</table>

Q8. How familiar are you with the following locations in San Luis Obispo County?
Q9. How likely would you be to consider visiting San Luis Obispo County in California in the next 24 months for leisure or vacation purposes?

- Very likely: 49%
- Somewhat likely: 34%
- Somewhat unlikely: 12%
- Very unlikely: 5%

Q10. Why are you unlikely to visit San Luis Obispo County for leisure/vacation in the next 24 months?

Reasons Why Unlikely to Visit
(Base=Very/Somewhat Unlikely; Multiple Responses)

- Don’t know enough about the area: 53%
- Not enough to do there: 24%
- Other destinations are closer: 19%
- Other destinations are easier to get to: 19%
- Other destinations offer a higher quality experience: 19%
- Lacks experiences that are important to me: 19%
- Other destinations offer a better family experience: 17%
- Been there many times before: 6%
- Doesn’t provide a good value for the money: 4%
- Doesn’t offer a luxury accommodation experience: 3%
- Weather isn’t what I like: 2%
- Some other reason: 11%
Q11. Have you seen, read or heard any advertising about visiting San Luis Obispo County in the past six months?
Q12. Where have you seen, read or heard advertising about visiting San Luis Obispo County in the past six months?
Q13. What specifically do you recall about the advertising you saw, read or heard?
Q14. Did the advertising that you experienced have any impact on your impressions or consideration of San Luis Obispo County as a travel destination?
Advertising Concepts

Three Banner Ads & Two Videos
Q15. After reviewing the ad, how much does this leisure travel destination appeal to you?

Q17. After reviewing the ad, how strongly do you agree or disagree...

Q18. Based on the advertisement you just saw, which of the following characteristics best describe this destination?

**Appeal of Ad**

- Very appealing: 51%
- Somewhat appealing: 39%
- Somewhat unappealing: 7%
- Very unappealing: 3%

**Strong Agreement**

- The visual description in this ad makes me interested in traveling to this destination: 51%
- This destination is relevant to me: 48%
- This ad is believable: 48%
- I enjoyed seeing this ad: 48%
- This ad makes me want to learn more about this location: 47%
- The concepts conveyed by this ad are meaningful to me: 44%
- After seeing this ad, I am more likely to visit this destination: 44%
- This location is unique and different: 44%
- This ad provides information I did not know before: 42%
- This ad would convince me to visit the booking website for this travel destination: 41%

**Describe Destination**

- 53% Outdoors
- 50% Exciting
- 48% Fun
- 41% Natural
- 22% Calm
- 22% Engaging
- 22% Refreshing
- 18% Friendly
- 18% Family
- 16% Unique
- 15% Happy
- 13% Inviting
- 12% Casual
- 4% Boring
- 4% Romantic
- 4% Not for me
- 2% Ordinary
Q15. After reviewing the ad, how much does this leisure travel destination appeal to you?
Q17. After reviewing the ad, how strongly do you agree or disagree...
Q18. Based on the advertisement you just saw, which of the following characteristics best describe this destination?
**Q15.** After reviewing the ad, how much does this leisure travel destination appeal to you?

**Q17.** After reviewing the ad, how strongly do you agree or disagree...

**Q18.** Based on the advertisement you just saw, which of the following characteristics best describe this destination?

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**Appeal of Ad**

*Total Respondents:*

- Somewhat appealing: 42%
- Very appealing: 44%
- Somewhat unappealing: 10%
- Very unappealing: 4%

**Strong Agreement**

*Total Respondents (% 9-10 on 10-Point Scale):*

- The visual description in this ad makes me interested in traveling to this destination: 46%
- This destination is relevant to me: 45%
- This ad is believable: 44%
- I enjoyed seeing this ad: 41%
- This ad makes me want to learn more about this location: 41%
- The concepts conveyed by this ad are meaningful to me: 40%
- After seeing this ad, I am more likely to visit this destination: 40%
- This ad would convince me to visit the booking website for this travel destination: 39%
- This location is unique and different: 38%
- This ad provides information I did not know before: 35%

**Describe Destination**

*Total Respondents (% Selecting: Up to Five):*

- Calm: 48%
- Romantic: 41%
- Outdoors: 34%
- Casual: 31%
- Natural: 29%
- Friendly: 23%
- Happy: 22%
- Fun: 18%
- Family: 17%
- Inviting: 17%
- For someone like me: 16%
- Refreshing: 16%
- Engaging: 13%
- Unique: 9%
- Boring: 6%
- Not for me: 5%
- Ordinary: 4%

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Q15. After reviewing the ad, how much does this leisure travel destination appeal to you?
Q17. After reviewing the ad, how strongly do you agree or disagree...
Q19. Please rank the three ads that you reviewed with "1" identifying the one you prefer the most.
**Video Ad A**

### Appeal of Ad
*(Total Respondents)*

- Very appealing: 53%
- Somewhat appealing: 37%
- Somewhat unappealing: 8%
- Very unappealing: 2%

### Strong Agreement
*(Total Respondents; % 9-10 on 10-Point Scale)*

- The visual description in this ad makes me interested in traveling to this destination. 53%
- This destination is relevant to me. 51
- This ad is believable. 50
- I enjoyed seeing this ad. 49
- This ad makes me want to learn more about this location. 48
- After seeing this ad, I am more likely to visit this destination. 48
- The concepts conveyed by this ad are meaningful to me. 47
- This location is unique and different. 47
- This ad would convince me to visit the booking website for this travel destination. 46
- This ad provides information I did not know before. 44

### Describe Destination
*(Total Respondents; % Selecting; Up to Five)*

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>48%</td>
<td>Outdoors</td>
</tr>
<tr>
<td>46%</td>
<td>Exciting</td>
</tr>
<tr>
<td>46%</td>
<td>Fun</td>
</tr>
<tr>
<td>28%</td>
<td>Natural</td>
</tr>
<tr>
<td>24%</td>
<td>Calm</td>
</tr>
<tr>
<td>24%</td>
<td>Friendly</td>
</tr>
<tr>
<td>24%</td>
<td>Family</td>
</tr>
<tr>
<td>20%</td>
<td>Happy</td>
</tr>
<tr>
<td>19%</td>
<td>Engaging</td>
</tr>
<tr>
<td>18%</td>
<td>Casual</td>
</tr>
<tr>
<td>16%</td>
<td>For someone like me</td>
</tr>
<tr>
<td>16%</td>
<td>Inviting</td>
</tr>
<tr>
<td>16%</td>
<td>Refreshing</td>
</tr>
<tr>
<td>14%</td>
<td>Romantic</td>
</tr>
<tr>
<td>13%</td>
<td>Unique</td>
</tr>
<tr>
<td>4%</td>
<td>Boring</td>
</tr>
<tr>
<td>4%</td>
<td>Not for me</td>
</tr>
<tr>
<td>2%</td>
<td>Ordinary</td>
</tr>
</tbody>
</table>

Q15. After reviewing the ad, how much does this leisure travel destination appeal to you?
Q17. After reviewing the ad, how strongly do you agree or disagree...
Q18. Based on the advertisement you just saw, which of the following characteristics best describe this destination?
Video Ad B

**Appeal of Ad**  
*(Total Respondents)*
- Very appealing: 52%
- Somewhat appealing: 38%
- Somewhat unappealing: 8%
- Very unappealing: 2%

**Strong Agreement**  
*(Total Respondents; % 9-10 on 10-Point Scale)*
- The visual description in this ad makes me interested in traveling to this destination: 51%
- This destination is relevant to me: 49%
- This ad is believable: 49%
- I enjoyed seeing this ad: 47%
- The concepts conveyed by this ad are meaningful to me: 46%
- After seeing this ad, I am more likely to visit this destination: 46%
- This ad makes me want to learn more about this location: 44%
- This location is unique and different: 44%
- This ad provides information I did not know before: 43%
- This ad would convince me to visit the booking website for this travel destination: 43%

**Describe Destination**  
*(Total Respondents; % Selecting; Up to Five)*
- 43% Outdoors
- 16% Inviting
- 42 Fun
- 16 Refreshing
- 36 Exciting
- 16 Engaging
- 35 Family
- 15 For someone like me
- 30 Calm
- 13 Romantic
- 28 Friendly
- 12 Unique
- 25 Natural
- 6 Boring
- 20 Happy
- 4 Ordinary
- 20 Casual
- 4 Not for me

Q15. After reviewing the ad, how much does this leisure travel destination appeal to you?
Q17. After reviewing the ad, how strongly do you agree or disagree...
Q18. Based on the advertisement you just saw, which of the following characteristics best describe this destination?
Q15. After reviewing the ad, how much does this leisure travel destination appeal to you?
Q17. After reviewing the ad, how strongly do you agree or disagree...
Q20. Please rank the two video ads that you reviewed with "1" identifying the one you prefer the most.
Q9. How likely would you be to consider visiting San Luis Obispo County in California in the next 24 months for leisure or vacation purposes?

Q21. After seeing the advertisements, how likely would you be to consider visiting San Luis Obispo County in California for a trip or vacation in the next 24 months?
Leisure Travel Behavior & Preferences
Q23. On average, about how much do you typically spend per person when you take a leisure travel trip domestically (including all travel expenses like airfare, hotel, food, beverage, etc.)?

Average (Mean) Spending per Person per Trip by Segment ($000)
(Total Respondents)

<table>
<thead>
<tr>
<th>Location</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>$75-99k</th>
<th>$100-149k</th>
<th>$150-199k</th>
<th>$200k+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total</td>
<td>2,439</td>
<td>2,010</td>
<td>1,467</td>
<td>1,844</td>
<td>1,882</td>
<td>2,121</td>
<td>3,078</td>
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<tr>
<td>Los Angeles</td>
<td>2,093</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>San Francisco</td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>Seattle</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Las Vegas</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phoenix</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1,618</td>
</tr>
</tbody>
</table>

Q23. On average, about how much do you typically spend per person when you take a leisure travel trip domestically (including all travel expenses like airfare, hotel, food, beverage, etc.)?
Q22. Which of the following are important to you when traveling domestically (in the US) for leisure?

- Exploring new things: 65%
- Relaxation: 54%
- Visiting friends and family: 53%
- Food/dining: 48%
- Outdoor recreation (e.g. hiking, surfing, kayaking, mountain biking, etc.): 47%
- Cultural activities (e.g. museums, festivals, etc.): 44%
- Wine/wineries, vineyards: 37%
- Shopping: 33%

(Total Respondents; Multiple Responses)
Q22. Which of the following are important to you when traveling domestically (in the US) for leisure?

**Important Activities by Travel Spend per Person per Trip**

*Total Respondents*

- **Exploring new things**: 70% <= $500, 70% $501-$1000, 66% $1001-$3000, 52% $3000+
- **Relaxation**: 62% <= $500, 60% $501-$1000, 56% $1001-$3000, 53% $3000+
- **Visiting friends and family**: 53% <= $500, 53% $501-$1000, 46% $1001-$3000, 46% $3000+
- **Food/dining**: 46% <= $500, 56% $501-$1000, 49% $1001-$3000, 49% $3000+
- **Outdoor recreation (e.g. hiking, surfing, kayaking, mountain biking, etc.)**: 39% <= $500, 46% $501-$1000, 48% $1001-$3000, 48% $3000+
- **Cultural activities (e.g. museums, festivals, etc.)**: 39% <= $500, 46% $501-$1000, 45% $1001-$3000, 45% $3000+
- **Wine/wineries, vineyards**: 24% <= $500, 38% $501-$1000, 38% $1001-$3000, 40% $3000+
- **Shopping**: 15% <= $500, 26% $501-$1000, 36% $1001-$3000, 45% $3000+
Q24. How would you describe your style when you travel in the US?

**Style of Travel**
*(Total Respondents; Multiple Responses)*

**Total Respondents**
- Relaxed: 61%
- Casual: 55%
- Adventurous: 45%
- Family-oriented: 42%
- Romantic: 35%
- Luxury: 24%
- Off the beaten path: 18%
- Educational: 17%

**By Age**
- Relaxed (25-34): 58%
- Relaxed (35-44): 62%
- Relaxed (45-54): 63%
- Casual (25-34): 46%
- Casual (35-44): 59%
- Casual (45-54): 69%
- Adventurous (25-34): 51%
- Adventurous (35-44): 40%
- Adventurous (45-54): 36%
- Family-oriented (25-34): 40%
- Family-oriented (35-44): 40%
- Family-oriented (45-54): 47%
- Romantic (25-34): 38%
- Romantic (35-44): 43%
- Romantic (45-54): 31%
- Luxury (25-34): 23%
- Luxury (35-44): 27%
- Luxury (45-54): 22%
- Off the beaten path (25-34): 19%
- Off the beaten path (35-44): 16%
- Off the beaten path (45-54): 22%
- Educational (25-34): 18%
- Educational (35-44): 20%
- Educational (45-54): 17%
Q25. On average, about how long, in terms of days, are your US leisure travel trips?
Q26. When you travel domestically for leisure, which of the following modes of transportation do you take to get to the destination?
Q27. When you travel for leisure in the US, which of the following types of accommodation do you typically choose?
Q28. In which of the following seasons do you typically take leisure travel trips to US locations?
Q29. Where in the US have you taken leisure/vacation travel trips in the past 24 months?
Demographics
## Demographics

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Los Angeles</th>
<th>San Francisco</th>
<th>Seattle</th>
<th>Las Vegas</th>
<th>Phoenix</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>n=</strong></td>
<td>1498</td>
<td>500</td>
<td>377</td>
<td>167</td>
<td>201</td>
<td>253</td>
</tr>
<tr>
<td><strong>Age (Q2)</strong></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>25-34</td>
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<td>63%</td>
<td>53%</td>
<td>55%</td>
<td>45%</td>
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<td>35-44</td>
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<td>45-54</td>
<td>21</td>
<td>37</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>54</td>
</tr>
<tr>
<td><strong>Household income (Average) ($000) (Q3)</strong></td>
<td>135.7</td>
<td>134.8</td>
<td>140.7</td>
<td>145.1</td>
<td>122.8</td>
<td>134.5</td>
</tr>
<tr>
<td><strong># of overnight leisure trips taken in US past 12 months (Q4)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
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<td>16%</td>
<td>15</td>
<td>15</td>
<td>13</td>
<td>22</td>
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<td>28</td>
<td>31</td>
<td>31</td>
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<tr>
<td>3+</td>
<td>54</td>
<td>55</td>
<td>57</td>
<td>56</td>
<td>47</td>
<td>55</td>
</tr>
<tr>
<td><strong># of overnight leisure trips taken in US past 12 months (Q5)</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>0-1</td>
<td>14%</td>
<td>13%</td>
<td>13%</td>
<td>13%</td>
<td>17%</td>
<td>15%</td>
</tr>
<tr>
<td>2</td>
<td>29</td>
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</tr>
<tr>
<td>3+</td>
<td>57</td>
<td>58</td>
<td>58</td>
<td>57</td>
<td>53</td>
<td>57</td>
</tr>
<tr>
<td><strong>Marital status (Q32)</strong></td>
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<td></td>
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<td></td>
</tr>
<tr>
<td>Married or partnered</td>
<td>82%</td>
<td>81%</td>
<td>83%</td>
<td>91%</td>
<td>79%</td>
<td>82%</td>
</tr>
<tr>
<td>Single never married</td>
<td>14</td>
<td>15</td>
<td>16</td>
<td>8</td>
<td>18</td>
<td>10</td>
</tr>
<tr>
<td>Divorced, separated, widowed</td>
<td>4</td>
<td>4</td>
<td>1</td>
<td>1</td>
<td>3</td>
<td>8</td>
</tr>
</tbody>
</table>
## Demographics

<table>
<thead>
<tr>
<th></th>
<th>Total</th>
<th>Los Angeles</th>
<th>San Francisco</th>
<th>Seattle</th>
<th>Las Vegas</th>
<th>Phoenix</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>n=</strong></td>
<td>1498</td>
<td>500</td>
<td>377</td>
<td>167</td>
<td>201</td>
<td>253</td>
</tr>
<tr>
<td><strong>Education (Q30)</strong></td>
<td></td>
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<td></td>
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<td>Employed full-time</td>
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<td>82%</td>
<td>86%</td>
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<td>80%</td>
<td>81%</td>
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<td>Homemaker or stay-at-home parent</td>
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<td><strong>Travel with children (Q36)</strong></td>
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<tr>
<td>Travel with children</td>
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<td>59%</td>
<td>66%</td>
<td>74%</td>
<td>60%</td>
<td>51%</td>
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<td>Do not travel with children</td>
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<td>41%</td>
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### Demographics

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<th>Seattle</th>
<th>Las Vegas</th>
<th>Phoenix</th>
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<td><strong>Ethnicity (Q33)</strong></td>
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<td>White or Caucasian</td>
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<td>Hispanic/Latino</td>
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