

Vacaville Market Assessment and Brand Audit

**Research conducted for:
Vacaville Conference & Visitors Bureau**

**Destination Analysts, Inc.
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**Vacaville Conference
& Visitors Bureau**



Table of Contents

Executive Summary.....2

Objectives.....7

Research Plan..... 7

About Vacaville..... 10

Vacaville’s Visitor Industry..... 13

Vacaville’s Brand Attributes..... 15

Core Values..... 32

SWOT Analysis..... 32

Growth Opportunities..... 34

Executive Summary

- **Objectives.** The Vacaville Conference & Visitors Bureau is a relatively young organization, and as its marketing programs are implemented, a baseline of accurate, current information about the local tourism industry will be needed to measure the results of these efforts. The Bureau also understands that to effectively promote the city and build an effective brand presence, a market/brand assessment is needed to learn about visitor demographics and behaviors, potential target markets, the city's brand attributes and its core values. This study attempts to provide both a brand audit and a summary market assessment to help the bureau focus its marketing efforts and leverage its resources.
- **Methodology.** The research plan developed to address these goals is simple. First, an in-depth market assessment and brand audit focusing primarily on Vacaville's leisure travel markets¹ was conducted. This information was then used to perform a standard SWOT analysis of the Vacaville tourism industry and isolate what we believe to be the key growth opportunities for the Vacaville Conference & Visitors Bureau to consider.

Four separate survey research projects were conducted to support this process. These surveys looked at different groups of Vacaville visitors (and potential visitors), with the goal of developing estimates of key brand metrics from travelers at different stages of their travel planning process: (1) Before travel planning begins, (2) during travel planning, and (3) after arrival in Vacaville.

The first group studied, potential visitors to Vacaville, was surveyed in two venues. First, an intercept survey, followed by in-depth personal interviews, was conducted among visitors to the Solano County Pavilion at the California State Fair. Second, an online survey of residents of the San Francisco-Oakland-San Jose and Sacramento-Stockton-Modesto designated market areas was conducted.

The second group studied, visitors planning a trip to Vacaville, was surveyed online. The challenge of reaching travelers before arriving in Vacaville was addressed by reaching these people on Internet websites frequently used for Vacaville-specific travel planning. The survey was conducted from August to November of 2005 on several Vacaville-related websites. Banner

¹ The bulk of research presented in this paper focuses on Vacaville's leisure travel market and potential. This focus is primarily due to a conference center feasibility study conducted earlier this year for the Vacaville market and a desire to focus limited resources and avoid redundancy in research efforts. This report does, however, delve into the opinions of travelers on Vacaville as a place for business travel and for corporate meetings and events.

advertisements inviting website visitors to take a brief survey were posted on the websites of the City of Vacaville, the Vacaville Chamber of Commerce and the Vacaville Conference and Visitors Bureau. Ads were also placed in Google keyword search listings.

The final group studied was visitors to Vacaville who had already arrived in-market—that is, travelers staying in Vacaville hotels. A survey of these hotel guests was conducted from August to October of 2005. During this three month period, eleven Vacaville hotels distributed a two-page survey to their guests at check-in. The hotel guests were asked to complete the survey and return it to the front desk (sealed in a provided envelope) before they checked-out. This pencil and paper survey again asked questions that were very similar to the other surveys, including topics about travel in the region, but specifically focused on questions related to visitors in-market activity, spending and opinions on the Vacaville travel product.

- **Visitor Profile.** This report presents a summary profile of Vacaville's hotel guests. The research conducted for this study suggests that the average Vacaville hotel guest is 45.6 years old, with an annual household income of \$60,062. About half are men (52%) and half women (48%). Children under 18 account for about 17% of hotel guests. The typical travel party consists of 2.35 people, with 1.91 people staying in each hotel room. The typical travel party stays a total of 4.2 nights in Vacaville. The average length of their total trip (including destinations other than Vacaville) is 6.6 nights.

Most Vacaville hotel guests have been to the city before. According to the survey, only 38.8 percent of Vacaville hotel guests are visiting for the first time in the past 12 months, and one in five (20.6%) have visited Vacaville five or more times in the past 12 months. 57 percent expect to visit Vacaville again in the next 12 months. The two most important reasons for this planned return trip are to see friends and relatives or for business reasons. Vacaville's hotel guests come from around the globe, but the vast majority of hotel guests are from close to home. The city's top hotel feeder market is, in fact California, which accounts for 66.7 of total visitor volume. Oregon is the second largest state feeder market, accounting for 6.7 percent of hotel guests. In terms of counties contributing visitors to Vacaville's hotels, the top five markets (with percent of total visitor volume in parenthesis) are: Solano, CA (10.8%), Los Angeles, CA (7.5%), Santa Clara, CA (5.8%), Shasta, CA (4.2%) and Jackson, OR (3.3%).

About half of Vacaville's hotel guests (50.3%) are in town for "Vacation, leisure or personal reasons." The second largest market segment is "Business, convention or group meeting" accounting for one in five visitors (or 19.9%). The actual business segment is somewhat larger than this figure reflects, as

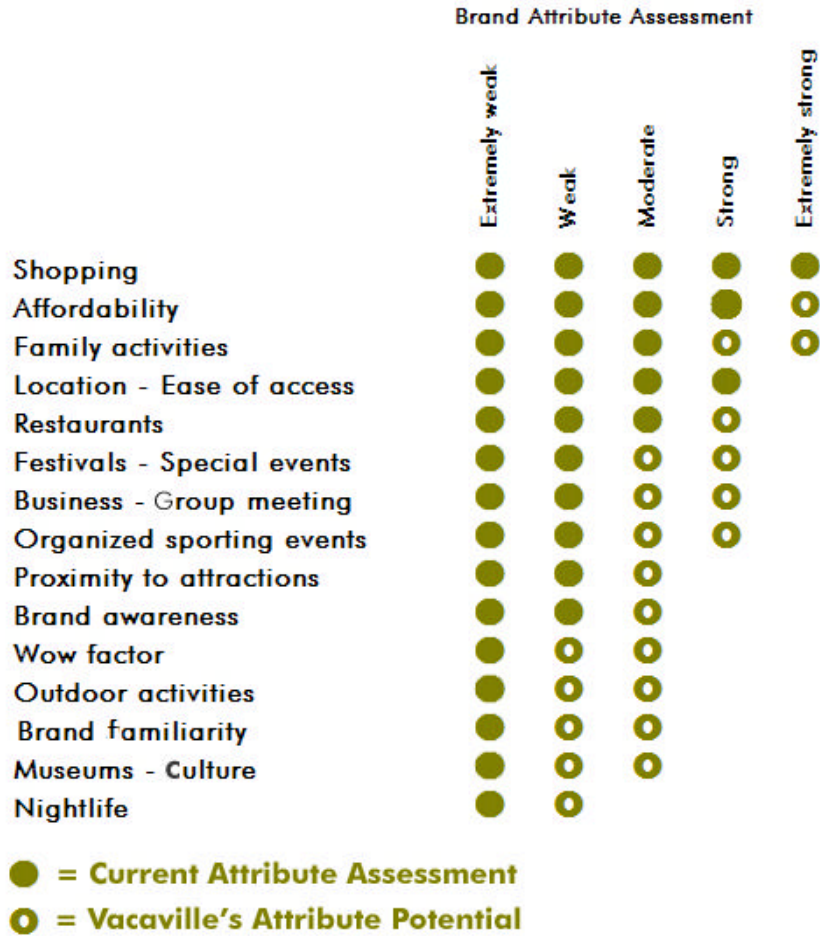
“government or military travel” accounts for an additional 12.3 percent of hotel guests. About 13 percent of Vacaville’s hotels guests are “just passing through” and 4.7 percent stayed in Vacaville hotel for “other” reasons.

The typical Vacaville hotel guest will spend \$162.05 per-person, per-day while in town (not including hotel tax). The average spending profile includes the following daily expenditure breakout: Accommodations (\$57.12), Shopping (\$42.46), Restaurants (\$27.97), Gas and other transportation (\$15.82), Other spending (\$18.68).

- **Brand Attributes.** Vacaville’s key brand attributes are summarized in the table below. This table shows our assessment of Vacaville’s brand attributes for both (1) their current condition and (2) their near-term potential. The current position is Destination Analysts’ assessment of the way things are right now—the way regional travelers view each of Vacaville’s brand attributes today. The near term potential shows our assessment of the way things could be—the way regional travelers could view Vacaville if conditions change as expected and appropriate marketing and advertising strategies are implemented.

The brand attributes discussed here are those that we believe are essential to understanding Vacaville’s brand positioning and its strengths, weaknesses and ultimately its growth potential. The attribute “strength ratings” are based on data collected for this project. For a given brand attribute, its strength rating is an assessment of the brand attribute’s ability to drive (or facilitate driving) incremental visitation to Vacaville. Some brand attributes may be more powerful than others, and even though synergy between attributes can be quite effective, we consider each in isolation. Keep in mind that an attribute like *Shopping* can be a powerful stand alone draw for a destination. Others like *Affordability* or *Ease of Access* need other forces to drive incremental visitation. People don’t travel to a destination simply because it is cheap or easy to reach. There must be other reasons to create a desire to travel. Such factors can work together with others, however, to form powerful brand attractors. Consider *Affordability* and *Family Activities* as a possible pairing of brand attributes.

BRAND ATTRIBUTE SUMMARY: VACAVILLE



A complete discussion of each brand attribute is presented later in this paper. However, it should be noted that the above framework is used with two specific goals in mind. First, by putting brand attribute assessments into such a framework we can easily see Vacaville's areas of strength, its core values. A destination may want to use these attributes heavily in their messaging and brand development efforts. They are the attributes most likely to resonate with the destination's target markets. It also provides a framework for examining areas of weakness--and more importantly areas of opportunity. A relatively weak brand attribute may in fact become an area of strength with changing conditions and appropriate marketing. This is especially the case with Vacaville, a newcomer to destination marketing, as it undergoes the impending redevelopment of its landmark Nut Tree complex and begins in earnest to sell itself.

- **Vacaville's Core Values.** A destination's core values are the primary brand attributes of the destination that drive travelers to visit. Core values are the

main reasons people choose to visit a destination, and as such, are often the strongest selling points for a destination. It is clear from this analysis that Vacaville has three core values: Shopping, family travel and location.

- **SWOT Analysis and Growth Opportunities.** SWOT is an acronym for “Strengths, Weaknesses, Opportunities and Threats.” A SWOT analysis is a standard marketing tool for identifying the strengths, weaknesses, opportunities and threats of a destination. The SWOT analysis in this report takes the information from our market and brand assessment and separates it into strengths and weaknesses (and opportunities and threats) for Vacaville. The SWOT analysis performed for this study suggests the following growth opportunities.

- **Core Value Marketing.** Perhaps the safest course for Vacaville to follow is to move forward by marketing the city as a convenient destination for shopping and family travel.
- **Develop endemic marketing partnerships.** Core values are an excellent place to start in developing endemic partnerships. Shopping and family travel are significant travel/lifestyle sectors and can be considered as the destination's best resource for cooperative marketing dollars.
- **Creative marketing to attract VFR travelers (or give locals reasons to invite VFRs to visit).** Vacaville has a large VFR segment currently in its hotels, and might explore the possibilities of increasing hotel occupancy by marketing to this segment.
- **Expand niche marketing to aggressively sell to military reunions, youth and special interest groups and sports events.** While the city may not be well-known as a place for this type travel, Vacaville is well-suited, to compete for these markets.
- **Brand education & development will be critical to the destination's long-term prosperity and are areas of current weakness.**
- **Develop new or emphasize existing festivals and special events.**

Objectives

This research project has two main objectives.

Develop baseline information about the Vacaville tourism industry. Until recently, the city of Vacaville had no official destination marketing organization like the Vacaville Conference & Visitors Bureau. As a result, there had been no catalyst to conduct this type of research. As the bureau's marketing programs are implemented, a baseline of accurate, current information about the local tourism industry will be needed to measure the results of these efforts. This research will serve, in part, as that baseline.

Conduct a destination market assessment and brand audit. The Vacaville Conference & Visitors Bureau wisely understands that to effectively promote the city and build an effective brand presence, a market assessment is needed to learn about visitor demographics and behaviors, potential target markets, the city's brand attributes and core values. This study attempts to provide both a brand audit and a summary market assessment to help the bureau focus its marketing efforts and leverage its resources. This information set is then used to conduct a SWOT analysis for the Vacaville tourism industry, which in turns allows us to develop a set of key industry growth opportunities.

Research plan

With these objectives in mind, a research plan was put in place. Four distinct research projects were conducted for this study². These four surveys looked at different groups of Vacaville visitors and potential visitors. The goal was to develop estimates of key metrics from travelers at different stages of their travel planning process:

Group 1: Potential Visitors (Before Any Travel Planning Begins)

Group 2: Visitors Planning a Trip to Vacaville

Group 3: After Arrival in Vacaville

At each of these three stages, surveys asked a variety of questions of potential and actual Vacaville visitors. Given Vacaville's geographic location and a realistic assessment of the city's status as a travel destination, it was decided to consider primarily residents of the immediate region, areas in northern California including the

² For a complete overview of each of these four projects, their questionnaires and top line results refer to this study's addendum: *Surveys Conducted for Vacaville Market Assessment & Brand Audit Project, 2005*.

nine county San Francisco bay area and the Sacramento-Stockton-Modesto metropolitan area.

Group 1: Potential visitors to Vacaville were surveyed in two venues. First, an intercept survey, followed by in-depth personal interviews, was conducted of visitors to the Solano County Pavilion and nearby food court at the California State Fair. Second, an online survey of residents of Northern California was conducted. Details of each follow:

California State Fair Surveys and Interviews. The California State Fair provided an excellent opportunity for our team to speak directly to area residents about their regional travel and their understanding of (and feelings about) Vacaville. A three person team canvassed the Fairground's Exhibition Hall A for approximately 3 hours on Friday, August 26th and Saturday, August 27th, 2005. State Fair visitors were approached and asked to take a brief survey about their travel habits. After completing this survey, they were asked if they had time to participate in a five-minute personal interview. These personal interviews were conducted to follow-up on the survey and to probe deeper into the respondent's feeling than a simple question/answer format would allow.

Over the two day period, 81 State Fair visitors were surveyed--41 of these people participated in the follow-up interview. It should be noted that almost all attendees were at the Fair with friends or family. Consequently, most of the interviews quickly morphed into small group discussions. The feedback received in this research represents feedback from many more people than the sample size of 81 appears to reflect.

Part of the appeal of speaking to California State Fair attendees was a belief that this group would be closely representative of Vacaville's potential visitor base. Geographically, we expected that State Fair attendees would be predominantly from the Sacramento-Stockton-Modesto area. Furthermore, we expected that we would be able to speak with a significant number of couples with children, as well as active people who might be behaviorally predisposed to take day trips to locations around the region for entertainment, dining and shopping. Examining the profile of survey respondents and interviewees, these expectations were clearly met. For a complete look at the results of these surveys and interviews, refer to the addendum to this report.

Survey of Northern Californians, 2005. In August of 2005, Destination Analysts conducted an online survey of 317 adult residents from the *San Francisco–Oakland–San Jose* and *Sacramento–Stockton–Modesto* Designated Market Areas (DMA). In an effort to draw a sample that reflects these two markets, the

survey sample was deliberately split between the two geographic areas. 161 surveys were collected from SF-Oakland-San Jose DMA residents and 156 from the Sacramento–Stockton–Modesto DMA residents. As Solano County is technically part of the San Francisco-Oakland-San Jose DMA, residents of Vacaville were excluded from this sample.

Survey invitations were sent to a randomly selected list of survey panel members of Survey Direct, Inc. The actual survey questionnaire was hosted on Destination Analysts' secure servers, and data collection took place over approximately three days. The survey asked numerous questions about travel in the region, but specifically focused on questions related to how Northern Californians see Vacaville as a travel destination. The survey covered Vacaville-centered topics such as recent travel to the market, attractions visited in Solano County and Vacaville proper, and the city's brand attributes and associations. For a complete look at the survey's questions and results, refer to the addendum to this report.

Group 2: Survey data collection from visitors planning a trip to Vacaville was also achieved with an Internet survey.

Survey of Internet Users Planning a Trip to Vacaville, 2005. The challenge of reaching travelers before their arrival in Vacaville was addressed by connecting with these people via Internet websites used for Vacaville travel planning. An online survey was conducted from August to November of 2005 on several Vacaville-related websites. In a simple procedure, banner advertisements inviting website visitors to take a brief survey were posted on the websites of the City of Vacaville, the Vacaville Chamber of Commerce and the Vacaville Conference & Visitors Bureau. Ads were also placed in Google keyword search listings and one other commercial Vacaville-related tourism website.

Many local residents and non-travelers filled out the survey, reflecting the diverse user base of these websites. However, a total of 163 surveys were completed by our target audience, non-local residents who were actively planning a trip to Vacaville. This is a relatively small survey sample size, but one that gives us enough data to make generalizations about the characteristics of this group. Again, the survey asked a set of questions that were very similar to those asked in the other surveys. Questions probed into travel in the region, but specifically focused on questions related to visitors' planned in-market activity, and opinions on Vacaville as a travel destination. For a complete look at this questionnaire and the survey's findings, please refer to the addendum to this report.

Group 3: The final group studied in this project was visitors to Vacaville who had already arrived in-market: travelers staying in Vacaville hotels.

Survey of Vacaville Hotel Guests. A survey of Vacaville hotel guests was conducted from August to October of 2005. During this three month period, eleven Vacaville hotels distributed a two-page survey to their guests at check-in. These hotel guests were asked to complete the survey and return it to the front desk (sealed in a provided envelope) before they checked-out. The vast majority of the city's hotel room inventory was included in this project. A total of 172 fully completed surveys were returned to the Vacaville Conference & Visitors Bureau. This survey again asked questions that were very similar to the other surveys—including topics about travel in the region—but specifically focused on questions related to visitors' in-market activity, spending and opinions on the Vacaville travel product. The addendum to this report contains the complete findings of this survey.

Limitations of the data. For two of the surveys conducted for this project, we collected data from relatively small sample sizes. The costs and time that would be needed for much larger sample sizes were simply prohibitive for this project. The sample sizes used here are, however, large enough to make top-line generalizations about the visitor groups studied. However, the data analysis we were able to conduct for this project was limited by these sample-size issues. For example, while we draw conclusions about the opinions of all Vacaville hotel guests, we were not able to draw such conclusions about the opinions of sub-samples of this population (e.g., business travelers, female hotel guests or hotel guests who were unfamiliar with Vacaville.) In any event, for our current purposes the sample sizes used here have proven more than sufficient.

About Vacaville

Vacaville is a 27.1 square-mile city in the Solano County of California. Neighboring Napa and Sonoma counties, it is located roughly halfway between Sacramento, 35 miles due east, and San Francisco, 55 miles to the southwest. Vacaville is in close proximity to the major highways that connect these two metropolises—including Interstate 80 and Interstate 505—making the city very accessible by automobile. Vacaville has a public-use non-towered airport, Nut Tree, serving charter flights. Commercial airline passengers come primarily via Sacramento International, 36 miles away. Other nearby airports include Travis AFB in Fairfield (9 miles), and Buchanan Field in Concord (27 miles). A network of inner and intercity bus services provide

connections to BART, Amtrak, and the Baylink Ferry³.

Currently 97,000 people⁴ reside in Vacaville. Growth patterns suggest that this number will likely increase substantially in subsequent years, as Vacaville's population has swelled 6.4% since 2000, and 22.5% since the 1990s⁵. Vacaville is a young city: the median resident age is only 33.9 years, which is significantly below California's average. Although over 80% of Vacaville's residents have completed at least a high school education, the proportion with a bachelor's degree or higher is well below the state average. Most Vacaville residents are white (63.2%), and the two largest ethnic groups are Hispanic (17.9%), and African American (10%). A majority of the residents are married (60.2%), and 41.4% of households have children under the age of 18. The average household size is 2.83 and the average family size is 3.24. The median household income is \$57,667, while the median income for a family is \$63,950. The median home value is at \$181,300⁶.

Other relevant aspects of Vacaville are outlined below.

- Vacaville is somewhat of a transient city, as the length of stay after moving to Vacaville is significantly below state average. With the presence of a state prison, the institutionalized population percentage is significantly above state average, which may be one of the reasons it skew male (54.2% to 45.8%). Nevertheless, Vacaville is a safe place. Its crime index rating falls nearly 140 points below the national average⁷.
- The largest employer in Vacaville is the state prison. However Vacaville is fast becoming a hub for the biotechnology and pharmaceutical industries, with Large Scale Biology Corporation, Genentech, ALZA Corporation, Chiron Corporation, and Durect Corporation operating facilities in the city. Other major industries providing employment are education, health and social services (19.2%), retail trade (13.1%), manufacturing (10.7%), and public administration (10.3%). 34.2% of Vacaville residents both live and work in the city.⁸
- There is currently one hospital in Vacaville--the Northbay Vacaville Hospital--but residents have access to several others in nearby areas. Travis Air Force Base and Hospital are to the south. In addition, Kaiser Permanente plans to build a new 166-bed, state-of-the-art hospital and related facilities adjacent to

³ Source: Vacaville Conference & Visitors Bureau

⁴ Source: City of Vacaville

⁵ Source: City-Data.com

⁶ All demographic information noted is from the 2000 US Census

⁷ Source: City-Data.com

⁸ Source: City-Data.com

its existing medical office building by 2008.⁹

- Vacaville has four public high schools and three private high schools, as well as ten public and five private primary and middle schools. While there are no colleges or universities in Vacaville proper, there are many close by in neighboring cities. Solano County Community College is just 11 miles away in Suisun and the University of California at Davis only 22 miles from downtown Vacaville¹⁰.
- Vacaville boasts a well-maintained yet affordable golf course, the Green Tree, and the Vacaville Museum, which is dedicated to preserving the history and culture of the city and surrounding areas. The museum is located in Historic Downtown, a destination in itself featuring lively dining, shopping, historic architecture and other activities. For aviation and/or WWII buffs, the Vacaville Nut Tree Museum offers visitors an intimate look at vintage war and civilian aircraft. Vacaville also has a thriving arts and culture scene, with a ballet, art gallery, culture center/performing arts theatre, and concert society. Opera and symphony performances can be frequently enjoyed as well. Vacaville is nearby other attractions, including the Jelly Belly Factory, Budweiser plant, Six Flags Marine World, and casinos¹¹.
- There are no professional sports teams in Vacaville, but residents can watch the Solano Thunderbirds, a California Collegiate League baseball team, play at Travis Credit Union Park during the summer. In addition, Vacaville residents can enjoy the plethora of indoor and outdoor recreation available, including 24 parks, Recreation Center with bowling, golf courses, paintball facility, aquatic center, skating rink and the state's largest indoor soccer field. Most notably, the Vacaville CreekWalk in Historic Downtown features 19-acres of tree-shaded, meandering walking paths, complete with waterfall, playgrounds, historical kiosks, outdoor art, BBQ pits and picnic tables¹².
- Weather in Vacaville ranges from mild winter temperatures (50s) to hot summer heat (90s)¹³.
- Vacaville residents don't have to look any further than their town for shopping. The 120-store Vacaville Premium Outlets at Nut Tree Shopping Center has made the city a shopping destination. In addition to the outlets, Vacaville also has the Alamo Plaza Shopping Center, Regency Park Plaza Shopping Center, Vacaville Commons Shopping Center, Vaca Village Shopping Center, Creekside Shopping Center, and Depot Station Shopping Center.

⁹ Source: City-Data.com

¹⁰ Source: City-Data.com

¹¹ Source: Vacaville Conference & Visitors Bureau

¹² Source: Vacaville Conference & Visitors Bureau

¹³ Source: City-Data.com

- Vacaville has 13 hotels accounting for 999 hotel rooms. The hotels are primarily national chains. Two national car rental companies operate in Vacaville: Avis and Enterprise.¹⁴

Vacaville's Visitor Industry

Good quantitative data on Vacaville's visitors is scarce. The city likely has three main visitor segments, (1) persons staying overnight in Vacaville hotels, (2) out-of-town visitors staying overnight in private homes in Vacaville, and (3) persons making day trips to Vacaville from surrounding areas. This final group, day trip visitors, includes regional residents and visitors to the region who might take a day trip to visit to Vacaville.

Prior to this study little was known about these three segments, and more research is needed to fully estimate the size of these groups, their in-market activities and the economic impact they generate for the city of Vacaville. Day trip visitors are undoubtedly uniquely important to Vacaville, as many visit on day trips specifically for shopping. But as is the case with most destination marketing organizations, driving incremental hotel guests is of critical importance as with this group comes visitor dollars and hotel tax revenues.

Visitor Profile: To frame the coming discussion of Vacaville's brand, this section presents a summary profile of Vacaville's hotel guests. The profile presented here comes directly from the 2005 Survey of Vacaville hotel Guests.

- **Hotel guest basics:** The research conducted for this study suggests that the average Vacaville hotel guest is 45.6 years old, with an annual household income of \$60,062. About half are men (52%) and half women (48%). Children under 18 account for about 17% of hotel guests. The typical travel party consists of 2.35 people, with 1.91 people per room. The typical travel party stays a total of 4.2 nights in Vacaville. The average length of their total trip (including destinations other than Vacaville) is 6.6 nights.
- **Repeat visitation is high:** Most Vacaville hotel guests have been to the city before. Only 38.8 percent are first-time visitors during the past 12 months and one in five (20.6%) have visited Vacaville five or more times during this period. 57 percent expect to visit Vacaville again in the next 12 months. The two most important reasons for this planned return trip is to see friends and relatives or for business reasons.

¹⁴ Source: Vacaville Conference & Visitors Bureau

- **Vacaville's feeder markets are close to home:** Vacaville's hotel guests come from around the globe, but the vast majority of hotel guests are from close to home. The city's top hotel feeder market is, in fact, California, which accounts for 66.7 percent of total visitor volume. Oregon is the second largest state feeder market, accounting for 6.7 percent of hotel guests. In terms of counties contributing visitors to Vacaville's hotels, the top five markets (with percent of total visitor volume in parenthesis) are: Solano, CA (10.8%), Los Angeles, CA (7.5%), Santa Clara, CA (5.8%), Shasta, CA (4.2%) and Jackson, OR (3.3%).

- **Market mix:** About half of Vacaville's hotel guests (50.3%) are in town for "Vacation, leisure or personal reasons." The second largest market segment is "Business, convention or group meeting" accounting for one in five visitors (or 19.9%). The actual business segment is somewhat larger than this figure reflects as "government or military travel" accounts for an addition 12.3 of hotel guests. About 13 percent of Vacaville's hotels guests are just passing through and 4.7 percent stayed in Vacaville hotel for "other" reasons.

- **Visitor Spending:** The typical Vacaville hotel guest will spend \$162.05 per-person, per-day while in town (not including hotel tax). The average spending profile includes the following daily expenditures per person:

Accommodations	\$57.12
Shopping	\$42.46
Restaurants	\$27.97
Gas – Other transportation	\$15.82
Other	\$18.68
Total	\$162.05

- **In-market Activities:** The most popular in-market activities for Vacaville hotel guests are dining, shopping and visiting friends and relatives. The chart below shows the percent of hotel guests estimated to participate in each activity. Notice the sharp drop off in the percent of visitors taking part in an activity that occurs between visiting the Vacaville Premium Outlets and going to historic downtown.

Restaurants	75.2%
Shopping	50.3%
Visit friend or relative	43.6%
Visit Vacaville Premium Outlets	33.9%
Go to historic downtown	13.3%

Vacaville's Brand Attributes

Brand attributes are simply properties of a given destination as seen by the destination's target audiences. A destination can have many attributes including such things as name recognition, perceived affordability, ease of access or the quality of nearby attractions. Our project aimed at understanding the most significant and most powerful attributes of the Vacaville brand that are relevant to traveler destination decision-making. From this we would create a perceptual map of the power of these brand attributes. This perceptual map could then be used to focus the Bureau marketing and brand building efforts.

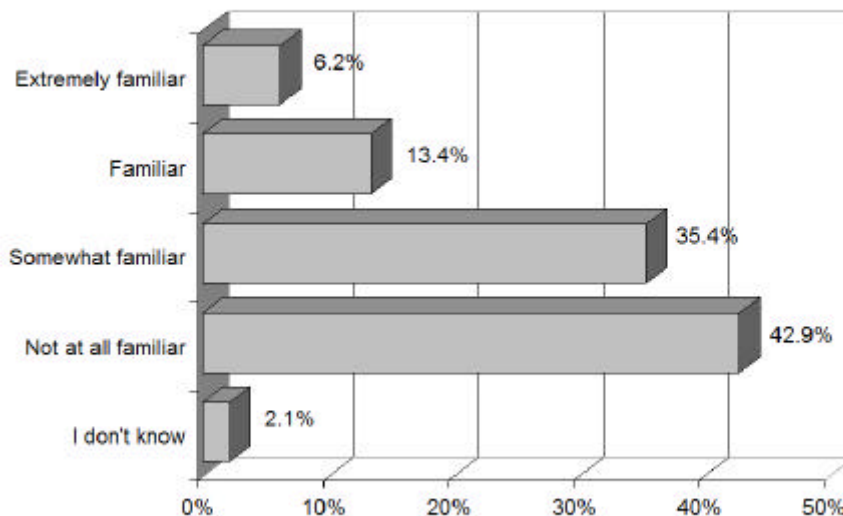
The salient attributes of Vacaville as a destination are outlined in the pages that follow. After a discussion of each brand attribute, the city's "Core Values," or the primary destination attributes that drive travelers to visit Vacaville will be discussed.

1. Vacaville's brand awareness and brand familiarity. Like any product or service, a destination can have levels of brand recognition and recall in the mind of the traveling public. Understanding this aspect of a destination is critical to understanding the power of its brand. Furthermore, beyond simply recognizing the name of a destination, consumer familiarity with the brand's key attributes is extremely important.

- **High name recognition, but low brand recall.** Personal interviews conducted at the California State Fair confirmed that there is a high level of recognition of the destination Vacaville among the region's residents. Virtually all respondents at this venue immediately recognized Vacaville' name and knew at least something about the city. However, Vacaville was clearly not a "top-of-mind" destination. Most respondents were open to the idea of visiting Vacaville, but many seemed rather surprised to be asked questions about visiting Vacaville. It was clear that even though they knew of Vacaville, the city is not positioned as a place most would immediately (or perhaps ever) consider for a recreational visit.

- **Weak familiarity ratings.** In each of the surveys conducted for this study, respondents showed low levels of familiarity with things to see and do in Vacaville. Almost half of northern Californians (42.9%) said that they were "not at all familiar" with Vacaville's attractions. Similarly, about 45.7 percent of people planning a visit on the Internet said they were "not at all familiar" with local attractions and things to do. In both cases, very few expressed high levels of destination familiarity. Only about 20 percent of northern Californians said they were either "extremely familiar" or "familiar" with Vacaville's attractions, and just under 23 percent of those planning a visit on the Internet expressed this sentiment.

Table 1: Familiarity with Vacaville (Northern Californians)



Source: 2005 Survey of Northern Californians, Vacaville Conference & Visitors Bureau

Familiarity ratings from the survey of Vacaville hotels guests were understandably higher, but still only 25 percent of this group said they were either “extremely familiar” or “familiar” with Vacaville.

- **Weak familiarity suppresses recreational visitation.** An important re-occurring theme found in this research was that the region’s residents feel like they simply don’t know what Vacaville has to offer--and that this is an important reason they would not consider visiting the destination. In the survey of northern Californians, for example, respondents were asked if they would ever consider visiting Vacaville. Over half said they would not or that they were uncertain. When asked why they wouldn’t consider visiting Vacaville, the predominant answer (given by about 65% of respondents) was that Vacaville had “nothing to do” or that they “couldn’t think of anything” to do there. This finding is strongly supported by the personal interviews conducted at the California State Fair. The clear majority of these people seemed open to Vacaville and many had positive feelings about the town. However, beyond outlet shopping they were generally very hard pressed to think of reasons to visit.

Key finding: Vacaville is widely recognized by the region’s travelers, but understanding of what Vacaville has to offer beyond outlet shopping is extremely limited. Low levels of destination familiarity suppress visitation to the city.

2. Retail shopping. Shopping is an important leisure travel activity, and for some cities, can be a key core value that actually attracts travelers to the destination. In fact, according to the Travel Industry Association of America (TIA), shopping is the most popular travel activity for U.S. adult travelers. Approximately 91 million people, or 63 percent of adult travelers in 2000, included shopping as an activity on a trip. Because people can go shopping on more than one trip away from home, TIA estimates that 34 percent of all person-trips include shopping¹⁵.

There can be no doubt that Vacaville is an important regional shopping destination and that shopping is a critical driver of incremental visitation to the city. In fact, data gathered in this study suggests that shopping is Vacaville's most important brand attribute and core value.

- **Strong positive brand association.** In the mind of each of the groups surveyed for this project, Vacaville has a strong positive association with shopping. For example, about 65 percent of Internet users planning a trip to Vacaville said that shopping in Vacaville was either "good" or "very good." Similarly, about half (53%) of northern Californians gave shopping in Vacaville a "good" or "very good" rating. When unaided brand attribute awareness was tested, shopping was also Vacaville's top-rated attribute with northern Californians. When asked to write down the strongest associations they had with Vacaville, 30.4 percent of respondents mentioned shopping. Vacaville's hotel guests had the strongest positive impression of Vacaville's shopping opportunities. Over 85% of this group rated shopping in Vacaville as either "good" or "very good."

The Vacaville Premium Outlets, rather than downtown shopping, appear to be the key to this strong brand association with shopping. In both surveys and personal interviews, the outlet malls were mentioned frequently as the pillar of the Vacaville shopping scene. While the downtown areas are clearly lesser known, this fits with larger national trends in shopping while traveling. According to the Travel Industry Association of America, the most popular place to shop on trips is, in fact, traditional shopping centers or malls¹⁶.

- **Shopping activities in-market.** Vacaville is not only strongly associated with shopping, the activity is widely participated in by its visitors. 75% of northern Californians who had visited Vacaville said that they have shopped at the Vacaville Premium Outlets at least once in past 3 years. Furthermore, 50.3 % of the city's hotel guests said that they intend to shop while in-market, and expect to spend (on average) \$42.46 per-person per-day while shopping in Vacaville.

¹⁵ Travel Industry Association of America. Domestic Travel Market Report, 2003 Edition.

¹⁶ Travel Industry Association of America. Domestic Travel Market Report, 2003 Edition.

Among those planning a trip to Vacaville online, 56 percent plan to shop while in town.

- **Shopping as a reason for travel to Vacaville.** Shopping is an important travel activity, but it also holds considerable potential as a stimulus to driving incremental visitation to Vacaville. Among those planning a trip to Vacaville online who would consider visiting Vacaville, when asked about the reasons they would consider making a trip to the city, 84% said they would consider taking a day trip to Vacaville specifically to shop. An additional 24% said they would consider taking an overnight trip to Vacaville to shop. Among Northern Californians who would consider visiting Vacaville, 50 percent said they would consider visiting on a day trip to shop and even 6.1 percent said they would consider an overnight shopping trip to the city.

Interviews conducted at the State Fair also support these findings. In these conversations, shopping came up time and time again as Vacaville's most interesting attribute. It was clear from these interviews, however, that Vacaville faces competition as a shopping destination, but also that there is considerable excitement about this aspect of Vacaville among many of the region's residents.

Key finding: Vacaville's brand is strongly associated with shopping. In fact, Vacaville shopping is a critical driver of incremental visitation to the city. Data gathered in this study suggests that shopping may well be Vacaville's most important brand attribute and core value.

3. Location and Ease of Access. All groups considered in this report were aware of Vacaville's strategic location (halfway between the San Francisco bay area and the Sacramento-Stockton-Modesto metropolitan area) and ease of access (at the crossroads of Interstates 80 and 505). For the most part, this was seen as a strong positive brand attribute. If they had a reason to visit Vacaville, it is not too distant from most and easy to access.

- **Vacaville is seen as easy to get to.** In all three surveys conducted for this study, Vacaville's location was given high scores as a destination attribute. In the survey of travelers planning a visit to Vacaville, location was the top attribute, scored as "good" or "very good" by 62 percent of survey respondents. In the Survey of Vacaville hotel guests, location was the second highest ranked attribute, with 72 percent of respondents giving the city's location a "good" or "very good" ranking.

Interviews conducted at the California State Fair confirm this finding. Among those interviewed, it was clear that Vacaville is seen as being in a convenient

location. In most cases, these respondents felt that getting to Vacaville was easy. This attribute quality is positive in the sense that regional travelers don't appear to see any major impediments to visiting the destination. The downside is, of course, that this easy in and out access makes selling the idea of an overnight stay more challenging with this group.

An important sentiment expressed in these interviews is that many regional residents would be willing to stay over night in a Vacaville hotel—if and only if this hotel stay was connected with an activity or event in Vacaville that they found interesting.

- **Caveats.** Two related findings should be kept in mind. A sentiment was expressed in these groups that Vacaville has issues with (1) traffic/congestion and (2) rapid growth and over-development. For example, the Hotel Guest Survey results showed that in terms of associations with Vacaville, the fifth most commonly mentioned association was “growth-sprawl/over development.” In this same survey, the second lowest overall rating for brand associations was for “traffic,” and about 7 percent of respondents mentioned “traffic” as an association with Vacaville when asked on an open-ended question.

Key finding: Vacaville boasts a convenient location and easy access for residents of northern California. The groups studied in this project were aware of this and see it as a strong positive destination attribute. The downside of this attribute is that it makes selling an overnight stay to residents of the Central Valley and San Francisco Bay Area quite difficult. Interviews conducted at the California State Fair suggest that this is not, however, an impossible sell. There would be a willingness among some to stay overnight in connection with the right activity or event. Survey data collected in this project supports this finding and suggests a sizable portion of the regional market could potentially be attracted to stay overnight in Vacaville for the right reasons.

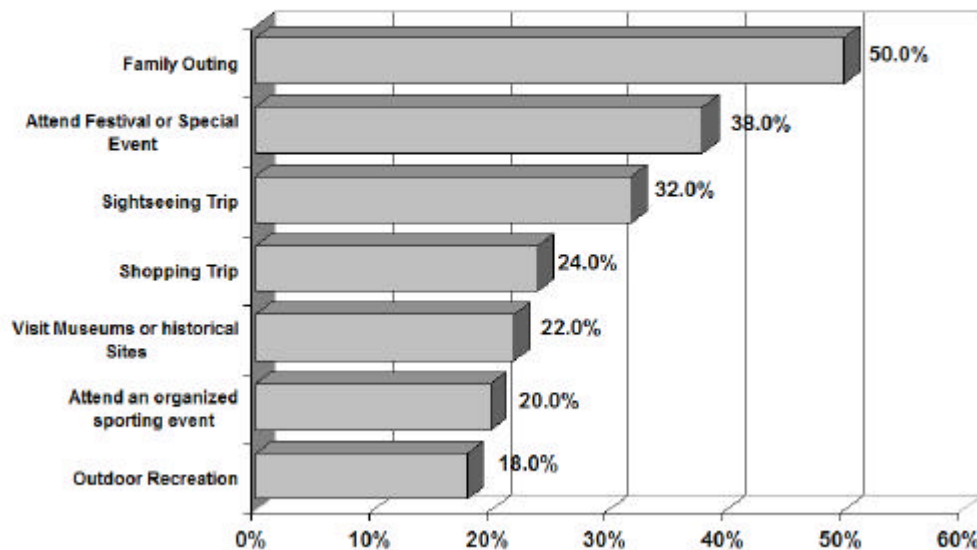
4. Family activities. Family travel is big. The Travel Industry Association of America reports that fully one in four household trips in the U.S. (or 26%) includes children under 18 years of age¹⁷. Family activities are also an important factor in why many people choose to visit a destination. In fact, over 40 percent of northern Californians surveyed for this project said that family activities were an important determinant in where they decide to travel. Overall, Vacaville appears to be seen as a family-friendly destination, receiving reasonably good survey ratings for its family activities and very high ratings for its cleanliness, safety and the friendliness of its residents. The following findings support this position.

¹⁷ Travel Industry Association of America. Domestic Travel Market Report, 2004 Edition

- **Visiting friends & family is a large part of Vacaville’s current market mix.** The Vacaville hotel market is strongly supported by so-called VFRs (visiting friends or relatives). According to the Vacaville Hotel Guest Survey conducted for this project, almost 44 percent of people staying in a local hotel intend to visit friends or relatives while in Vacaville—indicating that family travel is a very significant segment of the current market.

- **Family activities scored well with survey groups.** Vacaville hotel guests rated family activities as a strong positive brand attribute. Over 46 percent of these visitors said in our survey that Vacaville had either “good” or “very good” family activities. Northern Californians as a whole rated Vacaville’s family activities as above average and expressed a willingness to visit the city on a family outing. 36.5 percent of northern Californians who would consider visiting Vacaville said they would be willing to visit Vacaville on a day trip specifically for family activities. Almost 20 percent said they would consider an overnight trip to Vacaville for a family activity. These sentiments were even stronger among Internet users planning a trip to Vacaville—58 percent would consider a day trip and 50 percent an overnight trip specifically for family a family outing (see Table 2 below).

Table 2: Reasons Internet Travel Planners Might Consider an Overnight Visit to Vacaville

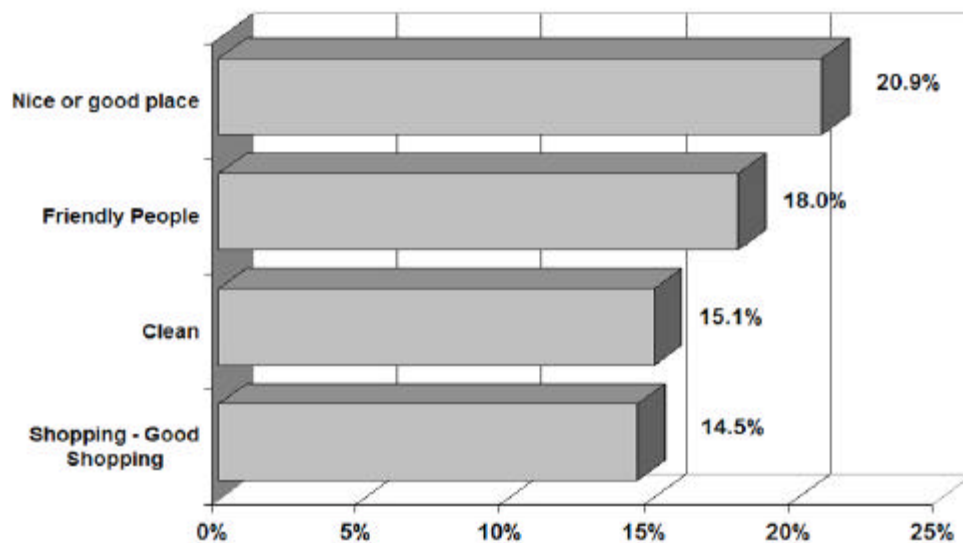


Source: 2005 Survey of Internet Users Planning a Trip to Vacaville, Vacaville Conference & Visitors Bureau

- **Vacaville has other very strong family-friendly attributes.** Beyond data showing that VFR activity is big in the market and that the brand is associated with good family travel activities, Vacaville appears to be seen as having attributes consistent with a positive place for family travel.

Good, clean, friendly and safe are terms that visitors might use to describe Vacaville. This was especially clear in the survey responses given by Vacaville's hotels guests. When asked the open-ended question of what are their two strongest associations with Vacaville (either positive or negative), the top three most commonly mentioned associations were (1) a nice or good place, (2) friendly people and (3) clean (see Table 3 Below). Virtually no hotel guests saw Vacaville as an unsafe place, and over half gave Vacaville's safety a "good" or "very good" rating.

Table 3: Top Associations with Vacaville (Hotel Guests)



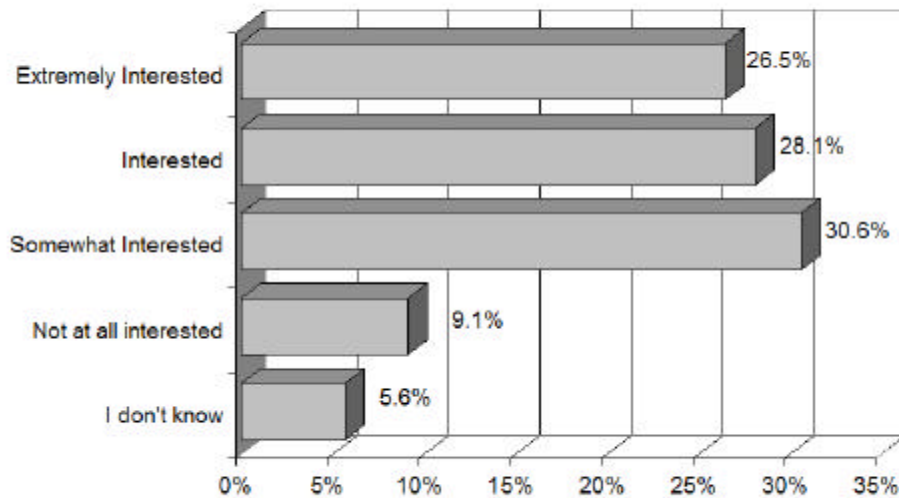
Source: 2005 Vacaville Hotel Guest Survey, Vacaville Conference & Visitors Bureau

- The Nut Tree Redevelopment looms large on the horizon.** Vacaville is currently seen by the groups studied for this report as family-friendly, with relatively good family activities. The upcoming redevelopment of the Nut Tree complex is likely to radically change this landscape. The old Nut Tree is a giant in Vacaville's brand landscape. This was clearly seen in the interview conducted at the State Fair. Almost all of the participants in these interviews spoke fondly of experiences at the Nut Tree and expressed eagerness to return when it reopened. A visit to the redeveloped Nut Tree was seen by this group as potentially an extraordinary family activity. Interviewees were largely uncertain as to the form the new Nut Tree will take, but excited to see it happen.

In the survey of northern Californians conducted for this project, only about one-third (34%) were aware that the Nut Tree was being redeveloped.

However, about 85 percent of respondents said they had some interest in visiting the new complex. Over 26 percent said that they were extremely interested in such a visit (see Table 4 below).

Table 4: Interest in Visiting Redeveloped Nut Tree Complex (Northern Californians)



Source: 2005 Survey of Northern Californians, Vacaville Conference & Visitors Bureau

Key finding: Family travel is an important market segment for Vacaville, accounting for about 44 percent of hotel guests. Vacaville is seen by the groups studied in this project as having moderately strong family activities and a general atmosphere that is highly compatible with family travel. The coming redevelopment of the Nut Tree is likely to dramatically change the city's brand landscape, allowing Vacaville to extract further gains from this segment.

5. Restaurants and dining. Vacaville's restaurants are significant to travelers in Northern California and are an important part of the city's brand. In our survey of Northern California residents, fully 87 percent of respondents who have visited Vacaville had eaten in a local restaurant sometime in the past 3 years. Interviews at the State Fair showed that many regional residents use Vacaville as a rest stop to eat on their way to and from Sacramento and the San Francisco Bay Area. Some even referred to a restaurant stop in Vacaville as a personal travel tradition.

- The Hotel Guest Survey found that restaurants were a second tier brand attribute when considered in the framework of an open-ended question on what respondents most strongly associate with Vacaville. However, when

asked directly to rate Vacaville's restaurants, the results were quite positive. These hotel guests made Vacaville's restaurants the third highest ranked attribute, just behind shopping and location. About 72 percent of Vacaville hotel guests said the destination's restaurants were either "good" or "very good." Many interviewees at the California State Fair seemed to have a high opinion of dining opportunities in Vacaville.

Key finding: Vacaville is seen as a dining location, if not an Interstate 80 dining destination, by many regional residents. Among current visitors, three in four dine while in town, and the city's restaurants received high survey ratings. For many, a strong emotional connection with Vacaville dining may exist due to positive memories of the old Nut Tree.

6. A place for organized sporting events. Sports and travel go hand-in-hand for many American travelers. According to the Travel Industry Association of America, two out of five U.S. adults (38%) attended an organized sports event, competition or tournament as either a spectator or as a participant while traveling in the past five years¹⁸. This adds up to 75.3 million U.S. adults. A majority of these sports event travelers took their most recent sports trip in the past year (70% or 52.7 million adults). According to TIA, the most popular organized sports event to watch or participate in while traveling is baseball or softball, with 17 percent of U.S. adults traveling 50 miles or more to see or play in a baseball or softball game in the past five years. This is followed by football (15%), basketball (9%) and auto/truck racing (8%).

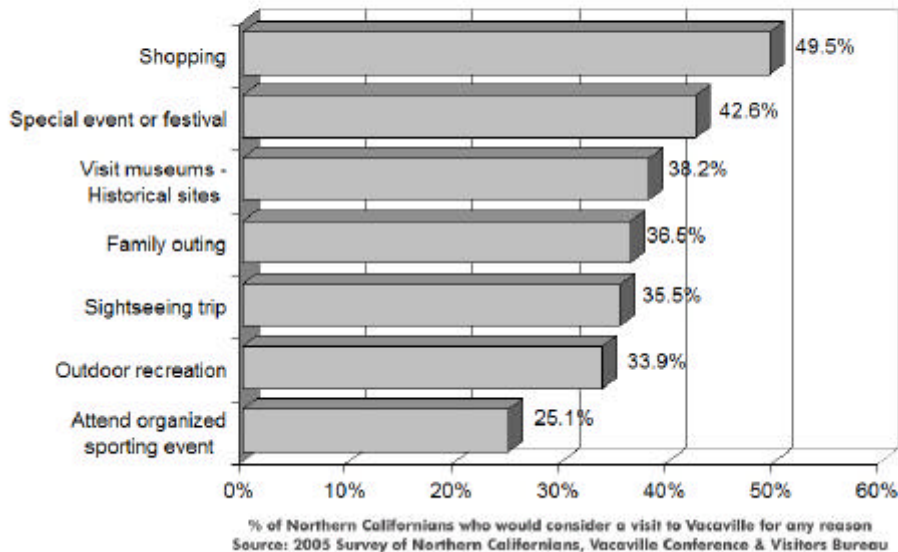
- **Vacaville's convenient location, perceived affordability, family-friendly atmosphere and ample sporting facilities would seem to make the city an ideal location for these events**, and for the flow of visitor traffic that would result from them. However, it appears that the city does not yet have a critical mass behind this notion amongst regional traveling audiences.
- In two surveys, the Survey of Northern Californians and the Survey of Internet Users Planning a Trip to Vacaville, respondents were asked whether they would consider taking a day trip or an overnight trip (or both) to Vacaville for several specific reasons. These reasons included activities such as a "family outing," "special event or festival," "shopping," etc. Respondents were also asked whether they would consider visiting Vacaville to "attend an organized sporting event." The results of both surveys are discouraging.

In the Survey of Northern Californians, among all reasons for visiting Vacaville on a day trip, attending an organized sporting event came in dead last. Only one in four respondents who would consider a Vacaville trip (25.1%) said they would

¹⁸ Travel Industry Association of America. Profile of Travelers Who Attend Sports Events.

consider such a trip (see Table 5 below). Only 6.6 percent said they would consider making an overnight trip to Vacaville to attend an organized sporting event. These low scores may reflect the lack of well-known sporting events. In interviews at the State Fair, respondents frequently asserted that they would love to come to Vacaville if there were sports events, especially hockey.

Table 5: Reasons Travelers Would Consider a Day Trip Visit to Vacaville (Northern Californians)



The Survey of Internet Users Planning a Trip to Vacaville showed similar findings in that “attend an organized sporting event” was the least popular option for a day trip and second from the bottom in terms of overnight trips. This group, however, was much more likely to say they would consider making this trip. 40 percent were open to the day trip option and 20 percent willing to consider an overnight trip to attend an organized sporting event. While differences between the two groups are significant, it should be remembered that respondents to this survey were actively planning a trip to Vacaville when surveyed. By this behavior it's safe to say that the likelihood that they would visit Vacaville for any reason is higher than the general population of Northern Californian adults.

As mentioned, interviews conducted at the California State Fair for this project probed into the question of whether or not regional residents see Vacaville as a place they would visit for sports events. As a broad generalization, these interviewees did not see Vacaville currently as a particularly special place for such events, but expressed openness to the idea if a sporting event of interest came up. A typical response would be a quizzical, “What sports do they have in Vacaville?” In terms of existing sports (Vacaville Thunderbirds, for example)

there was very little interest expressed. Team loyalty to other franchises such as the Sacramento River Cats or even major sports franchises like the Oakland Raiders seemed to drive these sentiment.

Key finding: Travel to attend or participate in sporting events is an important market segment that Vacaville is well-positioned to pursue. However, Vacaville is not widely seen as a sports destination among groups studied for this project. Nevertheless, Vacaville is seen by travelers as having very positive destination attributes that would make it a good place for such events: Family-friendly, clean, safe, convenient and easily accessible.

7. Affordability. One of Vacaville's strong positive brand attributes is a high perceived level of affordability. In our survey of Northern Californians, fully 40 percent of respondents gave Vacaville a "good" or "very good" rating when asked about affordability. Only 13 percent gave the city a "poor" or "very poor" rating. Similar results were found in the Hotel Guest Survey. About 64 percent of these respondents said Vacaville's affordability was "good" or "very good" and only 10 percent rated it as "poor" or "very poor."

Key finding: Vacaville is widely perceived by groups studied for this project as an affordable destination.

8. Nightlife. Vacaville appears to be mostly perceived as lacking a serious nightlife. In both the California State Fair interviews and the surveys conducted for this project, nightlife was rated poorly as a Vacaville brand attribute. In the Survey of Northern Californians, nightlife received the second lowest rating among all brand attributes tested. Only 7.8 percent of this group rated Vacaville's nightlife as "good" or "very good," while about 30 percent rated it "poor" or "very poor." Similarly, in the Hotel Guest Survey and Survey of Internet Users Planning a Trip to Vacaville nightlife came in dead last in our studies' brand attribute rankings.

Key finding: Vacaville's weakest brand attribute may well be its nightlife. This weakness may also prove to be a strength when marketing to segments that value Vacaville's other positive brand attribute.

9. Festivals and special event location. According to the Travel Industry Association of America, festivals and special events remain a very popular travel activity¹⁹. TIA reports that four in ten (41%) U.S. adult travelers attended a festival and/or fair during a trip in the past year. This translates to an estimated 59.5 million U.S. adults. One in

¹⁹ Travel Industry Association of America. The Historic/Cultural Traveler, 2003 Edition.

five (20%) past-year travelers (28.9 million adults) say they attended a heritage, ethnic, or folk festival or fair. About one third (31%) of past-year travelers (45.8 million adults) attended another type of festival or fair, such as a state or county fair or arts and crafts fair.

- Vacaville currently lacks major festivals or special events to serve as a tourist attraction. Vacaville does, however, host an array of smaller special events with tourism development potential such as the Creek Walk Summer Concert series and others mentioned earlier. Research conducted in this study suggests that festivals and special events may be a strong opportunity point for Vacaville. Consumer interest as expressed in personal interviews is high, and willingness to visit for such activities is one of the stronger sentiments found in this project's surveys.
- Interviews conducted at the California State Fair showed that residents of the region would be open to attending special events in Vacaville. The city's ease of access, close proximity and friendly atmosphere were cited as reasons respondents expressed a high level of interest in such events. The qualifier was, of course, that the event would have to be interesting and fun.
- The surveys conducted for this project strongly support this finding. In total, 19 percent of the region's residents who had visited Vacaville reported in the Survey of Northern Californians that they had actually attended a festival or special event in Vacaville in the past three year. More importantly, in this survey respondents were asked if they would consider a visit to Vacaville to attend such and event. Among those who would consider visiting for any reason, four in ten (42%) said that they would consider a day trip to Vacaville for this reason and one in four (25%) said that they would consider an overnight trip to attend a festival or special event in Vacaville. Festivals and special events were the single highest rated reason this group would consider for an overnight trip to Vacaville.
- The Survey of Internet Users Planning a Trip to Vacaville showed even stronger results. Among members of this group, 66 percent said they would consider a day trip to Vacaville for a special event or festival and 38 percent said they would consider and overnight trip.

Key finding: Vacaville currently lacks events and festivals with broad reach and appeal, and consequently is not seen by the audiences studied in this project as being a festival or event destination. However, this seems to be a strong opportunity area for the city, as regional travelers expressed a strong enthusiasm toward the possibility of attending events or festivals in Vacaville.

10. Proximity to interesting attractions. Many destinations lay claim to the sometimes dubious marketing distinction of being the gateway to some place else. Vacaville has strong brand attributes in affordability and convenience/ease of access. It also has the interesting attribute of sitting in the heart of a region full of major tourist attractions such as San Francisco, Napa Valley Wine Country, Sacramento and Gold Country, and smaller high-quality attractions such as Travis Air Force Base, the Jelly Belly Factory or Vallejo's Six Flags Marine World.

- When looking at data collected for this project we have mixed findings. The group of travelers staying in Vacaville hotels gave the city surprisingly high marks for its proximity to interesting attractions. Fully 52 percent of survey respondents gave Vacaville's proximity to interesting attractions a rating of "good" or "very good." Comparing this to the Survey of Northern Californians, however, we see a much lower rating. Only 28.3 percent of this group gave Vacaville a rating of "good" or "very good" when asked to rate its proximity to interesting attractions. Similarly, 26 percent of Internet users planning a trip to Vacaville rated the city's proximity to attractions as "good" or "very good."

We suggest using this data with care. It stands to reason that regional residents (Oakland, Sacramento, Vallejo, Fairfield, etc.) would be less impressed with this destination attribute than would visitors from outside the region. A person living in the Northern California region might feel their homes have equally good access to these attractions. Only 10 percent of Vacaville hotel guests were from Solano County, and many were from regions outside the San Francisco Bay or Sacramento areas.

- Vacaville might leverage this brand attribute among visitors from outside the region, but would likely not have success with regional travelers. If the city intends to market aggressively for regional travel and wishes to develop a consistent brand message, we recommend approaching this brand attribute with some caution.

Key finding: Vacaville is close to many major tourist attractions and is easy to access and has high perceived affordability. This brand attribute seems to have relatively little luster with the regional audiences, but may be a point of opportunity when marketing to travelers from other regions.

11. Outdoor activities. The Travel Industry Association of America reports that outdoor recreation is one of the top activities for U.S. travelers. Nearly one in four (23%) leisure person-trips includes some form of outdoor recreation. Outdoor trips are also likely to be taken by car (76%) and only one in six (17%) outdoor trips includes camping in an RV or tent. California is one of the world's great outdoor travel destinations. The

natural question arises about Vacaville: With its year-round temperate climate, array of parks, hiking trails and outdoor recreation facilities, do travelers see Vacaville as an outdoor recreation destination? Is this a viable market segment that Vacaville could pursue?

- Relatively speaking, outdoor activities do not appear to rate as one of the city's strong positive brand associations. Approximately 35 percent of respondents to the Hotel Guest Survey and 23 percent of respondents to the Survey of Northern Californians rated Vacaville's "outdoor activities" as either "good" or "very good." While these are somewhat encouraging numbers, the overall picture we draw from this and the open-ended brand associations is one of neutrality. It does not appear that when regional travelers think of Vacaville, they think of activities in the great outdoors. For example, in the Survey of Northern Californians, when asked if they would consider day trips to Vacaville for outdoor recreation, only 33 percent of respondents answered in the affirmative—the second lowest score among brand attributes tested.

Key finding: While Vacaville is blessed with an array of high-quality outdoor activities, there appears to be little enthusiasm for this brand attribute in the audiences studied for this report.

12. Museums – Culture. While Vacaville boasts an impressive museum and history, this element of the city is not currently seen by groups studied in this report as a significant brand attribute. In open-ended questions asking respondents to assess Vacaville's strongest brand associations, museums and culture did not register. They were not mentioned by a significant set of respondents. When specifically asked about this attribute, the responses tended toward the neutral or negative. For example, in the Survey of Northern Californians, about half gave Vacaville's Museums-Culture a neutral rating. Approximately 22 percent gave the city a "poor" or "very poor" rating and only 13 percent gave the city a "good" or "very good" rating.

Key finding: Vacaville's museums and culture are not currently seen by the audiences studied here as a powerful brand attribute.

13. Vacaville as a place for doing business. Vacaville is a rapidly growing commercial city. As such, there exists considerable potential for expansion in the transient business segment. As Vacaville's biotechnology sector expands and new businesses such as the Kaiser Permanente Hospital open, Vacaville can expect increases in transient business activity to support these enterprises. Additionally, with this economic expansion, the potential for business-related group meetings will also

blossom. This is a highly competitive market, and the Vacaville Conference & Visitors Bureau can expect many attractive regional destinations to vie for this group business.

- **Moderate consumer ratings as a place to do business.** As “a place to do business” respondents to this study’s surveys seemed to see Vacaville as a generally good or neutral place. Respondents to the Vacaville Hotel Guest survey showed the strongest positive feelings, with about 43 percent either giving Vacaville a “good” or “very good” rating as a place to do business. Similarly, respondents to the Survey of Internet Users Planning a Trip to Vacaville found that 38 percent believed that the city was a “good” or “very good” place to do business.

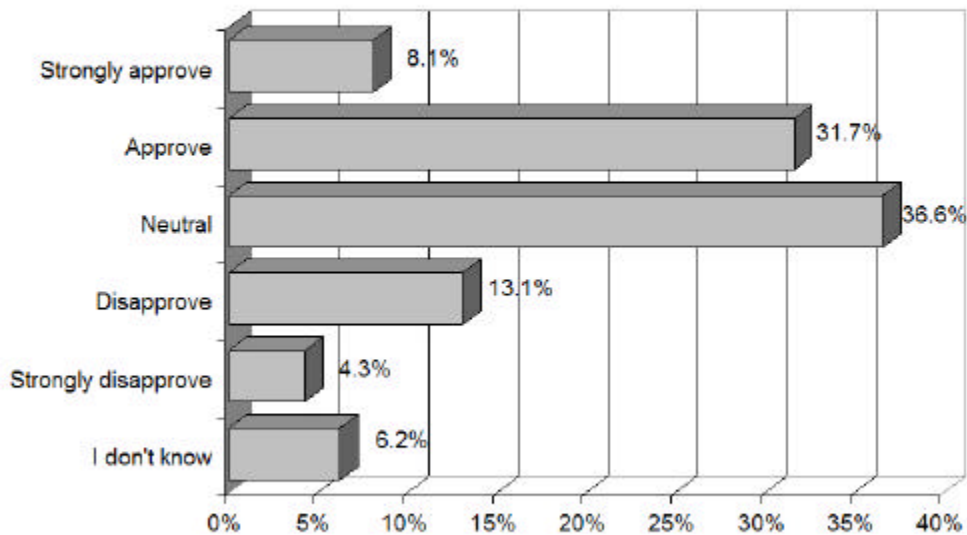
Keep in mind that these two groups are travelers with higher levels of contact or understanding of the Vacaville product. They are already in market or actively planning a visit. The Survey of Northern Californians paints a slightly less positive picture of Vacaville as a business travel location. When asked the same question of this group, the results were more neutral, with about 44 percent of respondents rating Vacaville as “neutral.” About 20 percent gave Vacaville a “good” or “very good” rating and about 15 percent gave it a “poor” or “very poor” rating. The remaining 20.8 percent did not have or register opinions.

- **Attendees are open to Vacaville as a meeting place.** Our research looked at consumers’ opinions on Vacaville as a place to hold meetings and other commercial group events and activities. On the two electronic surveys, employed respondents were asked to consider the hypothetical situation that their company was planning to hold a “conference, staff meeting party or other special event” in Vacaville. Respondents were then asked how they would feel about Vacaville as the location for this event.

Vacaville received strong ratings on both surveys. In both cases, about twice the number of respondents said they would “approve” or “strongly approve” of holding the event in Vacaville than said they would “disapprove” or “strongly disapprove.”

About 40 percent of respondents to the Survey of Northern Californians either “approved” or “strongly approved” of holding such an event in Vacaville (see Table 6 below) and only about 17 percent “disapproved” or “strongly disapproved.” In the Survey of Internet Users Planning a Trip to Vacaville, these approve/disapprove ratio was similar. About 53 percent were on the approval side of the equation and 22 percent on the disapproval side.

Table 6: How Would They Feel About Holding Company Meeting or Event in Vacaville (Northern Californians)



Source: 2005 Survey of Northern Californians, Vacaville Conference & Visitors Bureau

Key finding: Vacaville is a rapidly expanding commercial center and as such can expect growth in its transient business travel markets. The destination has a moderately positive to neutral image as a place to do business among respondent groups covered in this research. Vacaville is, however, a destination that would have overall strong levels of approval as a place to hold business functions—corporate events, conferences, staff meeting and parties. As place for a new conference center take shape, this may grow to be a critical market for Vacaville.

14. Wow Factor. The final brand attribute discussed here is called the Wow Factor. The Wow Factor can best be described as a feeling of excitement or enthusiasm that travelers feel about a destination. The Wow Factor is a brand intangible that many times makes a great destination great. It might be a feeling of excitement or energy inherent in a destination. It could also be a feeling of strangeness or uniqueness, or even extreme peace and quiet or beauty that promotes relaxation or escape. While the Wow Factor may be an important brand attribute for major tourist attractions, its absence should also be noted for travel destinations.

- Vacaville currently lacks a Wow Factor. However, one of the more interesting (and we believe important) findings of this research is the degree of enthusiasm with which regional residents greeted the idea of a redeveloped Nut Tree facilities. There was a palpable excitement during many California State Fair interviews when the topic of the redeveloped Nut Tree arose. As this redevelopment has not yet taken place, we obviously can not predict how much this will add to Vacaville's Wow Factor. The potential is there, however, and as the development proceeds this may prove to be a huge benefit to the Bureau's marketing efforts, especially when marketing for shopping and family travel, and developing markets for youth groups and sports events.

Key finding: Vacaville's currently lacks a Wow factor, but the redevelopment of the Nut Tree complex has significant potential to change this.

Vacaville's Core Values

Core values are the primary brand attributes of a destination that drive travelers to visit the destination. They are the main reasons people choose to visit, and as such, are often the strongest selling points for a destination. It is clear from this analysis that Vacaville has three main core values:

- **Shopping.** Vacaville may be one of Northern California's premier shopping destinations. This brand attribute for Vacaville is very strong and is primarily associated with the Vacaville Premium Outlets.
- **Family Travel.** Not only is Vacaville seen as having a family-friendly travel atmosphere (clean, safe and friendly) and activities, its core hotel audience appears to be people who are visiting at least in part to see friends or relatives.
- **Location.** Vacaville is seen by the regional audience as being in an extremely convenient location, with easy in and out access. This is a blessing for day trip visitation, but likely impedes overnights stays by residents of the nearby metropolitan areas.

SWOT Analysis

SWOT is an acronym for "Strengths, Weaknesses, Opportunities and Threats." A SWOT analysis is a standard marketing tool for identifying the strengths, weaknesses, opportunities and threats of a brand or destination. Specifically, SWOT is a basic, straightforward model that assesses what a destination can and cannot do, as well as its potential opportunities and threats. The method of SWOT analysis is to take the information from a market assessment analysis and separate it into internal (strengths and weaknesses) and external issues (opportunities and threats). Once this is completed, SWOT analysis determines what may assist the destination in accomplishing its objectives, and what obstacles must be overcome or minimized to achieve desired results.

In a sense, SWOT analysis is a formal framework of identifying and framing a destination's growth opportunities.

The table below summarizes the significant SWOT factors facing Vacaville.

<p>Strengths</p> <p>Premier regional shopping destination</p> <p>Outstanding major highway access</p> <p>Perceived as an affordable destination</p> <p>Proximity to major metropolitan areas (large potential visitor base)</p> <p>Proximity to extraordinary nearby tourist attractions</p> <p>Safe, clean, friendly and attractive city. Regional audiences agree.</p> <p>Excellent outdoor recreation opportunities and facilities for sporting events.</p> <p>Rapidly growing local economy. Military, corrections and biotech industries may be relatively recession proof.</p> <p>Proximity to Travis AFB and U.C. Davis</p>	<p>Weaknesses</p> <p>Lack of Wow Factor.</p> <p>Perceived as boring and lacking interesting things to see or do</p> <p>Extremely weak brand familiarity among regional traveling audiences</p> <p>No major sports teams and perception that the city lacks good sports events</p> <p>Proximity to major metropolitan areas (competition for tourist dollars and group, special event business)</p> <p>Lack of high-end lodging facilities (and bed & breakfast type lodging)</p> <p>Poor facilities for business meetings and small conferences relative to nearby destinations.</p>
<p>Opportunities</p> <p>Redeveloped Nut Tree complex may generate Wow Factor</p> <p>Expand core value marketing, selling Vacaville as a shopping and family destination</p> <p>Creative local VFR marketing could yield positive results</p> <p>Niche marketing to military reunions, youth and special interest groups and sports events may be fruitful.</p> <p>Education and brand development</p> <p>Develop new or emphasize existing festivals and special events</p> <p>Develop cooperative relationships with endemic partners - corporations that share an interest in core value markets</p>	<p>Threats</p> <p>Nut Tree redevelopment is a wild card factor with unknown potential impact</p> <p>Competition from other destinations for core value markets</p> <p>Competition from other destinations for niche markets</p> <p>Competition from other destinations for group business</p> <p>Economic uncertainty</p> <p>Lack of funding for tourism promotion activities</p>

Growth Opportunities

This forgoing SWOT Analysis leads us to the following set of growth opportunities for Vacaville. These are immediate-term recommendations. As the Nut Tree re-development and conference center plans move forward, these opportunities should be re-evaluated.

- **Expanded Core Value marketing**—with limited funding, focusing on the core value combination of shopping, family travel and location in future Bureau-led advertising, promotions, and marketing programs, holds promise. Current and potential visitors to Vacaville respond well to these brand attributes and will travel because of them. Vacaville is in a position to strengthen these aspects of its brand, and there is real opportunity to up Vacaville's status as the Northern California family shopping destination.
- **Develop endemic marketing partnerships**—Vacaville is fortunate to have several local companies—major chain hotels, franchise restaurants, the Premium Outlets—that share target audiences, core values and a common goal of increasing tourism. Partnering with these companies on cooperative advertising programs is a simple means of augmenting both the Bureau's and the companies' marketing budgets. Not only will this allow for more and better media frequency, aligning marketing and advertising efforts will also make for a more succinct message about the brand of Vacaville.
- **Creative marketing to attract VFR travelers or give locals reasons to invite VFRs to visit**—As Vacaville already has many VFR travelers, there is tremendous opportunity to expand this segment, and further stimulate repeat visitation. The Bureau and its partners can reach out to both VFR travelers and the Vacaville residents they are visiting, and devise creative ways to garner enthusiasm about traveling to the city. Keeping in mind Vacaville's core brand values, some of the focus could be on how easy traveling to Vacaville to visit friends and family is (which also opens up partnership opportunities with transportation companies/agencies), and the myriad of other unique opportunities, such as outlet shopping, available once there.
- **Expand niche marketing to aggressively go after military reunions, youth and special interest groups and sports events**—With the proximity of Travis Air Force Base and the Nut Tree Airport Museum, Vacaville is in a great position to become a larger military reunion destination. Youth and sporting events will be attracted to the indoor soccer stadium, paintball facility, hiking trails, etc. Through strategic grassroots efforts, the Bureau can reach out to these groups and make them aware of these assets. Again, Vacaville's core values—

shopping, family friendly, and easy accessibility and location—will inevitably be additional selling points to these niche markets.

- **Consumer education and brand development will be critical to the destination's long-term growth and are currently areas of weakness**—A dearth of tourism marketing money and, until recently, a dedicated tourism marketing organization, have left Vacaville's brand underutilized and its position weak in travelers' consideration set. Familiarity with the Vacaville travel product is also weak. The formation of the Conference & Visitors Bureau was a key way to reverse this situation. Consistent Bureau-led efforts to fully develop Vacaville's brand, and communicate it to the city's target markets through PR, advertising, promotions, and other marketing programs will be imperative to Vacaville realize its full tourism potential.
- **Develop new or emphasize existing festivals and special events**—Travelers in Vacaville's target markets are not only willing, but excited to travel for special events and festivals. Vacaville's reputation as a safe, easily accessible place for families to travel puts it in a superior position to easily generate tourism for special events. Vacaville offers parks, the indoor soccer stadium, the Nut Tree, and other existing facilities to hold the events and attract event organizers. Special event tourism has enormous potential to generate incremental visitation for other (non-event related) reasons, and provides another framework to build Vacaville's brand.