

Annual Marketing Work Plan



FY17/18

From the CEO

Dreams Awakened

California's travel and tourism industry — like the Golden State itself — is defined by innovation, and over the past 25 years, the leaders and pioneers who have shaped this industry never stopped dreaming big.

Today, the California Dream touches countless lives around the world, amplified by a Visit California program that serves as a next generation marketer on behalf of the Golden State's tourism community. While local in spirit, our efforts are truly global in scale, led by a diverse Board of Directors comprising leaders from every corner of the industry, guided as always by a unifying vision for an even brighter future.

The results speak for themselves. Today, California remains the No. 1 destination in the nation, hosting more than 270 million travelers who spent \$126 billion in the state in 2016. Tourism supported 1.1 million jobs for Californians while generating \$10.3 billion in state and local tax revenues, and Visit California brand investment fueled media buys and best-in-class creative that drove \$12.9 billion in incremental visitor spending and an additional 5.6 million trips.

While these successes have been monumental, in true California spirit, we have even bigger dreams on the horizon.

This Marketing Work Plan is the blueprint for Visit California's global marketing efforts. In this FY17/18 edition, you'll find new programs, including full plans for the California Golden State of Luxury Initiative and California Family Initiative, both of which detail efforts and activations against two critically important audiences.

Everything that Visit California does on behalf of California is made possible by the strength of the collective tens of thousands of industry partners. The dedication and partnership of leaders throughout the state have paved the way for this dynamic industry to achieve even greater goals in the coming years and beyond.

I look forward to our continued collaboration as we shape the future of California together.

Dream Big!

A handwritten signature in black ink that reads "Caroline Beteta".

Caroline Beteta
President & CEO
Visit California

Summary

Visit California’s marketing plans are part of an ongoing process with a strategic planning document developed for a two-year horizon. Key strategies, audiences and Visit California’s overarching approach are outlined within the FY16-18 Dream Big Dividend Strategic Work Plan. In addition to the strategy document, a yearly work plan outlines the key programs and tactical campaigns planned for each fiscal year.

For the FY17/18 timeframe the planning documents developed include:

- May 2016 — FY16/17 and FY17/18 Dream Big Dividend Strategic Work Plan
- December 2017 — “California Luxury Initiative” program plan
- February 2017 — “California Family Initiative” program plan

The final planning document enclosed complements the strategic plans developed:

- May 2017 — FY17/18 Visit California Annual Work Plan

Each of the planning documents is designed to build upon the strategic framework laid out in the two-year plan in May 2016.

Background

FY16/17 marked the second year of the Dream Big Dividend plan in action. New program elements were activated to address new market segments (Super Affluent, Family) and to expand global reach in key industry pillars (Outdoor, Culinary and Arts and Entertainment). The need for agency collaboration exponentially increased as Visit California broadened content programming across 13 key international markets.

Many global and economic factors surfaced in 2017, impacting tourism in ways that will continue for the foreseeable future. These factors include the strength of the U.S. currency in many of Visit California's operating markets; U.S. political dynamics; harsh weather conditions in the United States; and record levels of snowpack in California. Increased precipitation relieved the drought crisis in California, but brought other transportation concerns to the forefront, including road closures and storm damage, which have created infrastructure challenges.

Program Performance

In FY15/16, Visit California's brand investment drove \$12.9 billion in incremental visitor spending and an additional 5.6 million trips. The program included paid marketing both domestically and in six international markets.

- Incremental visitor spending increased 25 percent, up from \$10.3 billion in the previous reporting period.
 - * Incremental visitor spending increased 17 percent in the markets targeted over both years (United States, United Kingdom, Canada, China), expanding from \$10.3 billion to \$12.1 billion.
 - * The FY15/16 marketing program added three international markets: Australia, Mexico and Brazil, which generated another \$800 million to push the total to \$12.9 billion.
- The increase in visitor spending was driven by a significant increase in media spending. Global consumer media spend increased 42 percent, from \$31.3 million in FY14/15 to \$44.5 million in FY15/16.

Visit California's overall marketing program measurement and performance results can be daunting. But closer examination by a broader audience construct — **consumers, media** and **travel trade** — brings upshots into focus. A broad range of global marketing activity across paid, owned, earned and trade initiatives delivered strong results in FY15/16, fueling inspiration and desire for the California brand and travel experience worldwide.

FY15/16 Global Campaign Metrics			Figure 1
PAID	OWNED	EARNED	TRAVEL TRADE
8.2 BILLION TOTAL GLOBAL BRAND IMPRESSIONS	108 MILLION DREAM 365TV VIDEO VIEWS	\$521 MILLION GLOBAL MEDIA VALUE	25+ SALES MISSIONS & TRADE SHOWS
↑ 36 PERCENT	↑ 4,000+ PERCENT	↑ 48 PERCENT	↑ 25 PERCENT
<ul style="list-style-type: none"> • 11 brand markets • 70 weeks of TV • 111 weeks of OTV • 238 weeks of digital banner ads 	<ul style="list-style-type: none"> • 18.2 million page views on Visit California global websites (1.2 million more partner handoffs than the year prior) • 413 million global social media impressions • 10.6 million global e-newsletter sends • 1.5 million California Welcome Center visitors 	<ul style="list-style-type: none"> • 6 billion global impressions • 700+ total media hosted (more than double the year prior) • 10,000+ media placements • 2,500+ media participants at events globally 	<ul style="list-style-type: none"> • 2,500 California brochure pages • 40 FAM tours • 1,300 California industry participants • 3,900 meetings with travel trade • 14,400 trained trade representatives

FY15/16 Global ROI Summary

Figure 2

Country	Incremental trips	Average California trip expenditures	Incremental visitor spending	Media expenditures
United Kingdom	104,512	\$3,837	\$401,012,544	\$3,923,614
Domestic	4,664,754	\$2,240	\$10,450,772,129	\$28,303,111
Canada	209,765	\$2,107	\$441,878,990	\$2,051,893
Mexico	234,351	\$1,652	\$387,246,905	\$1,969,320
Brazil	87,258	\$2,362	\$206,125,265	\$926,890
China	200,864	\$3,831	\$769,567,845	\$5,147,198
Australia	71,555	\$2,951	\$211,139,862	\$2,159,339
Total	5,573,060	\$2,309	\$12,867,743,540	\$45,481,365

FY16/17 Marketing Highlights

The second full year of the Dream Big Dividend program introduced a number of new programs across global markets. The geographic focus of the program remained consistent with the construct outlined in the Strategic Marketing plan (page 2-15). Visit California used the Marketing Allocation Platform to determine investment across global markets and enacted direct-to-consumer media programming in Australia, Canada, China, Mexico, the United Kingdom and the United States.* In secondary global markets, Visit California developed an active social media and influencer presence to reach consumers directly. In all global markets, Visit California conducted year-round travel trade and public relations programs designed to strengthen trade and media partnerships.

A look inside program highlights and milestones for FY16/17 will be distributed in the Visit California Year in Review annual report available after the close of the fiscal year.

*Brazil was originally outlined as a direct-to-consumer Tier 1 market in the two-year strategic plan. Given the political and economic environment in FY16/17, however, together with the international committee, Visit California determined to slow down the direct-to-consumer portion of the program. Visit California maintained a strong trade presence in the market and has been continuing to monitor the overall economic conditions to best determine future consumer investment plans.

FY17/18 Marketing Core Objectives

Key marketing for FY17/18 will remain consistent with the prior year's program. Visit California will continue to focus on the overall California brand programming and further develop content distribution and consumer engagement platforms in paid and owned media programs.

New program execution to achieve the core program objectives will include the following key areas:

Innovation — Visit California will continue to focus on the mobile platform and working directly with consumers to upload content and increase interaction. Visit California's content will continue evolving to appeal to all audience targets. The organization will work to deepen technology partnerships and reach consumers during the inspiration and planning phases of the purchase funnel. Visit California will also include a larger component of user generated content and "consumer-to-consumer" (C2C) engagement programs.

International — The organization will continue to expand California content offerings within all 13 international markets. In each market, Visit California will continue to evolve both localized content and specific regional content across all owned platforms. Global content partnerships will be explored to increase Visit California's reach. In China, a new platform on WeChat will be launched to directly promote California to China travelers.

Influencers — Visit California will focus on global influencers of the California brand and recruit spokespeople willing to tweet, post and write about California to their fans and followers. Visit California will work with influencers across paid, owned and earned channels and will further coordinate efforts globally to secure local voices supporting California messaging.

India — Visit California will emphasize its marketing program within the India market and capitalize on the predicted growth of India outbound market from 18 million in 2014 to 30 million or more by 2020. This activity will take place in conjunction with the national focus on India commerce with the U.S.-India Travel and Tourism Partnership that was launched including a bi-lateral trade agreement with U.S. government and India to promote two way travel and tourism.

As outlined in the Dream Big Dividend Work Plan (Page 2-32), Visit California will continue to embrace an audience-centric strategic framework (see figure on page ix) as the basis for the development of annual programs of work. These plans are designed to deliver on the objectives of building brand awareness, fostering brand engagement and inspiring these target audiences to travel to California.



Los Angeles Olympics 2024 Bid Support

Visit California is committed to supporting Los Angeles as the city works to secure the bid to host the 2024 Summer Olympic Games. If successful, the eyes of the world will be on the Golden State as Los Angeles positions itself as the city of the future. This tremendous opportunity would create a global glow effect — much like Super Bowl 50 affected the greater San Francisco Bay Area — and allow Visit California to leverage the attention through specific Olympics-related messaging promoting destinations throughout the state. The announcement of the host city will take place in fall 2017.

Marketing Core Objectives

The Visit California marketing program is guided by a set of **key marketing objectives**. Developed as part of the five-year marketing planning process, the objectives have been refined to reflect the current landscape and planned program of work.

Expand statewide **brand** and marketing **platform**.

Take advantage of Visit California's position at the state level to create desire for the California travel experience and provide a global platform that supports DMO and industry marketing investments.

STRATEGIES

- Paid & Earned Media
- Partnerships & Co-operative Marketing
- Research

METRICS

- Advertising Awareness
- Incremental Travel & Spend
- Co-op & Sponsorship Revenue

Deepen consumer **engagement**.

Deepen relationships with consumers to provide inspiration and entice sharing while also serving to connect travelers to best-in-class resources — both industry partners and third parties — to facilitate planning and booking.

STRATEGIES

- Content Distribution
- Digital Owned Platforms
- Social Media

METRICS

- Content Reach / Impressions
- Followers & Interactions
- Buzz & Sentiment
- Handoffs to Industry Partners

Further penetration in **international** markets.

Build on global brand activity to strengthen California's international presence through partnership with national marketing efforts and continued development of relationships with third-party influencers — both media and trade.

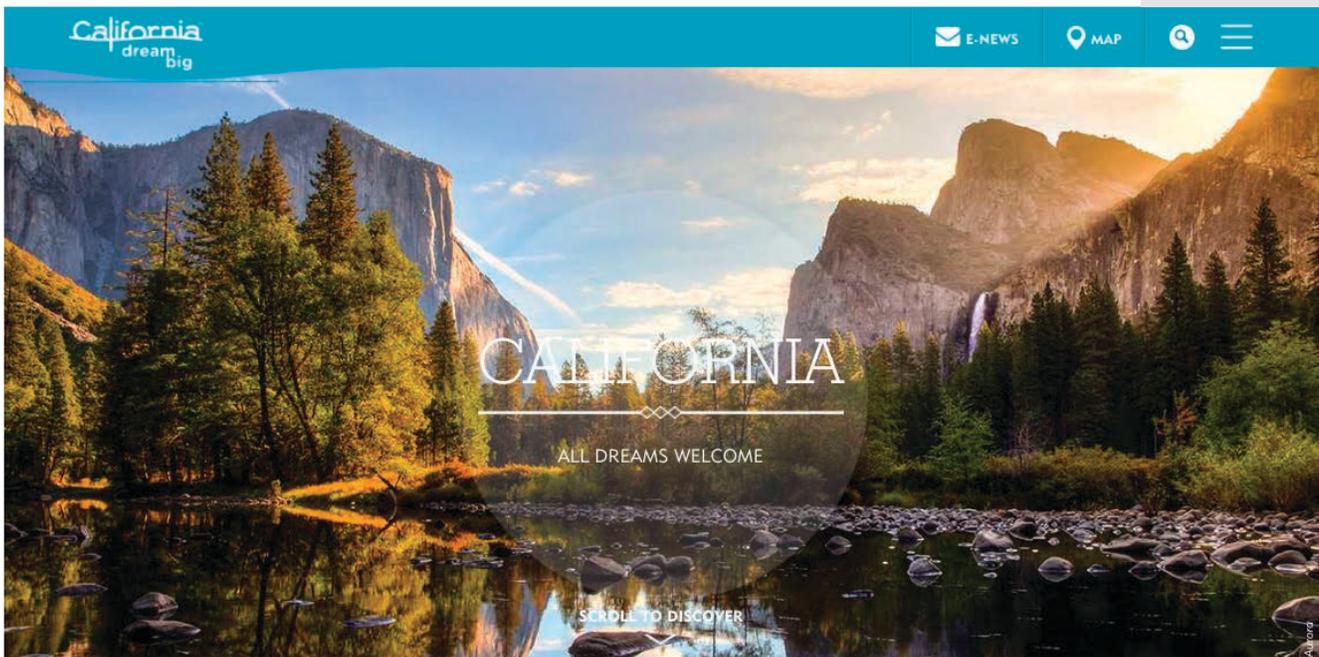
STRATEGIES

- Events & Sales Missions
- Sales Tools & Product Training
- Co-operative Programming
- Airline Partnership
- Brand USA Partnership

METRICS

- Product Placement in Trade & Media Channels
- Reach/Engagement with B2B Audiences
- Leveraged Investment

Figure 3



“All Dreams Welcome”

California depends heavily on visitation from international destinations, which were collectively responsible for more than \$25 billion in spending in 2016. And in countries around the world, it is critically important that California is still perceived as welcoming even in times of global uncertainty.

To that end, California’s tourism industry is working together to roll out the red carpet to international visitors through a new initiative called “All Dreams Welcome.” This program is an optimization on the California Dream Big brand, leveraging Visit California’s global brand investment. While not political, this special initiative will target key international markets and drive home the point that California and the California brand stand apart, welcoming all those who seek to dream big.

“All Dreams Welcome” will parlay California’s global Dream Big positioning into a communications platform that celebrates the state’s inherent openness and hospitality — our “everybody is welcome culture” — and fuels greater participation with the brand over the long term.

“All Dreams Welcome” messaging will be woven into as many elements of Visit California’s consumer-facing campaigns as possible. It is a multi-pronged initiative that will focus heavily on PR, with additional paid digital and social content pieces, as well as activations in owned channels in select international markets. Moreover, there will be cooperative opportunities for industry partners.

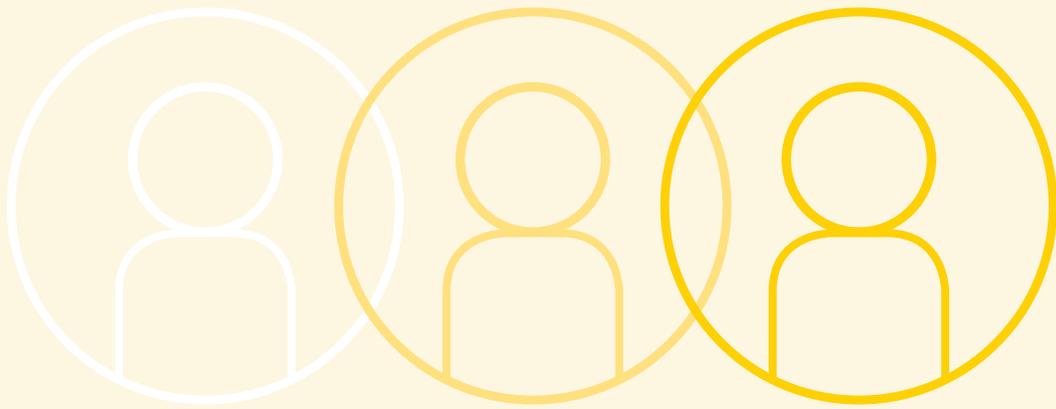
Trade & Media Activity Calendar

To view a live planning calendar of events through 2020, go to industry.VisitCalifornia.com/coops.

- Trade Shows
- Sales Missions and Training Roadshows
- Media and Public Relations
- Additional Programs

	January	February	March	April	May	June
2018	Go West Summit (Jan 16-19)	GITF (Guangzhou)	ITB (Berlin, Mar. 7-11)	ATM (Dubai)	IPW (Denver/May 19-23)	
				TravelWeek (Sao Paulo)		
			Mexico Sales Mission	China Sales Mission		Brazil Sales Mission
	Mexico Media Mission		New York Media Reception	Los Angeles Media Reception		Brazil Media Mission
				China Media Mission		
		Outlook Forum	California Road Trips Ad Sales Close	Active America China	RTO Summit East	
		RTO Summit West				
2019		GITF (Guangzhou)	ITB (Berlin)	ATM (Dubai)		IPW Anaheim/June 1-5
		Go West Summit (Feb 18-24)		TravelWeek (Sao Paulo)		
			Japan/Korea Sales Mission	China Sales Mission		Brazil Sales Mission
			Mexico Sales Mission			
			New York Media Reception	China Media Mission		Brazil Media Mission
	California Restaurant Month	Outlook Forum	California Road Trips Ad Sales Close	Active America China	RTO Summit East	
		RTO Summit West				
2020		GITF (Guangzhou)	ITB (Berlin)	ATM (Dubai)	IPW (Las Vegas/May 30-June 3)	
		Go West Summit		TravelWeek (Sao Paulo)		
	Mexico Sales Mission			China Sales Mission		Brazil Sales Mission
			New York Media Reception	San Francisco Media Reception		Brazil Media Mission
			Mexico Media Mission	China Media Mission		
	California Restaurant Month	Outlook Forum	California Road Trips Ad Sales Close	Active America China	RTO Summit East	
		RTO Summit West				

July	August	September	October	November	December	
		Top RESA (Paris)		WTM (London)	ILTM (Cannes)	2018
		JATA (Tokyo)		CITM (Shanghai)		
				NTA Travel Exchange (Milwaukee/Nov. 4-8)		
				TITF (Taipei)		
		Brand USA India Sales Mission	Canada Sales Mission	Germany Sales Days		
		India Sales Days				
	Australia & New Zealand Media Mission	San Francisco Media Reception	Canada Media Mission			
	Virtuoso TravelWeek (Las Vegas)				International Visitors Guide Ad Sales Close	
	California Visitors Guide Ad Sales Close					
		Top RESA (Paris)		WTM (London)	ILTM (Cannes)	2019
		JATA (Tokyo)		TITF (Taipei)	NTA Travel Exchange	
U.K. & Ireland Sales Mission	Australia & New Zealand Sales Mission	Brand USA India Sales Mission	Canada Sales Mission	France Sales Days		
		India Sales Days				
U.K. & Ireland Media Mission		Los Angeles Media Reception	Canada Media Mission			
	Virtuoso TravelWeek (Las Vegas)				International Visitors Guide Ad Sales Close	
	California Visitors Guide Ad Sales Close					
		Top RESA (Paris)		WTM (London)	ILTM (Cannes)	2020
		JATA (Tokyo)		CITM (Shanghai)	NTA Travel Exchange	
				TITF (Taipei)		
		Brand USA India Sales Mission	Canada Sales Mission	Germany Sales Days		
		India Sales Days				
	Australia & New Zealand Media Mission		Canada Media Mission			
	Virtuoso TravelWeek (Las Vegas)				International Visitors Guide Ad Sales Close	
	California Visitors Guide Ad Sales Close					



Dream Big Dividend Work Plan



FY16/17 & 17/18

From the CEO

Traveling toward a brighter future

California's travel and tourism industry dreams big — and is facing a future where the Golden State is the top destination in the world.

California continues to be the No. 1 destination in the United States. Travelers **spent \$122.5 billion** in 2015, a 3.4 percent increase over 2014. Tourism employs more than **1 million Californians**, adding **36,000 new jobs**. The industry also generated **\$9.9 billion** in local and state tax revenue last year, reinforcing its role as a cornerstone of the state's economy.

Visit California's Marketing Work Plan highlights new and evolved campaigns championing only-in-California experiences that will continue to drive more high-value visitors to the Golden State in the years to come. These programs build on successful foundational brand programming by creating new programs that dive deeper, offer increasingly sophisticated content and more effectively target global consumers.

The industry-supported Dream Big Dividend boosted the state's marketing budget to more than \$100 million and opened the door to a monumental future of prosperity for the Golden State. Along with growing marketing programs that deliver maximum ROI for the industry, Visit California also has scaled its Communications and Operations efforts to increase effectiveness and service to industry stakeholders.

This plan reflects the leadership and commitment of hundreds of active industry leaders, including the Board of Directors and seven committees whose guidance has led the development of a marketing program that delivers the California Dream around the globe.

I look forward to our continued collaboration and partnership. Together, the industry is accelerating to a future where California shines bigger and brighter than ever before.

A handwritten signature in black ink that reads "Caroline Beteta".

Caroline Beteta
President & CEO, Visit California

Introduction

Visit California's FY16/17 marketing plan is the organization's annual roadmap, guiding the work and investments that will be executed in the coming year. The plan outlines ways Visit California will continue to grow into an organization that is well equipped to execute a comprehensive, multi-pronged strategy that targets global consumers in the second year of Dream Big Dividend funding.

Uniting as a state in 2014 to overwhelmingly support the Dream Big Dividend Competitiveness Initiative, the travel and tourism industry wrote a mandate that is guiding California's longer-term future. The Dream Big Dividend is supporting more than \$100 million in robust state-level tourism marketing, which protects California's share of domestic and international tourism, while more fully maximizing the industry's ROI.

Background

As the only organization that provides a statewide platform for promoting California, Visit California targets domestic and international markets to position the state as a premier destination to prospective travelers. Marketing the California brand to the world is essential to ensuring the tourism industry continues to provide economic value to the bottom line of businesses and regions across the state.

Tourism is a valuable economic engine for California. The industry was responsible for \$122.5 billion in visitor-related spending and \$9.9 billion in state and local tax revenue in 2015. That influx of dollars supported jobs for more than 1 million Californians — the highest count in the more than 20 years since impact data has been tracked. Tourism has consistently outpaced the broader economy in growth and number of jobs created.

Visit California serves the state by growing inbound travel to California to increase visitor spending in the state, while raising the overall profile of California around the world. Boosting tourism also encourages critical infrastructure improvements and attracts strategic investment in the state, including significant economic development.

Marketing

Visit California has a well-established research program that serves as the foundation upon which its global marketing strategy is built, including producing core tourism research statistics for California. Data also informs strategic planning, program development and extensive psychographic modeling, which provide additional insight into the key audiences with which the California brand is likely to resonate.

Visit California considers quantitative data and additional information to evaluate priorities in California's top international markets. Tourism Economics' proprietary Market Allocation Platform is used to determine markets that have optimal receptivity to California travel. The research tool uses information on market potential, macro and micro environment factors, as well as marketing costs and historic investment.

The results inform Visit California's market prioritization, which details strategies and tactics based on three tiers:

- **Tier 1: Consumer Brand Markets**

In Tier 1 markets, Visit California invests heavily in direct-to-consumer advertising and promotional programs. A concentration of paid media activity supports trade and public relations initiatives.

The Dream Big Dividend funds seven markets in the top tier: United States, Australia, Brazil, Canada, China, Mexico and United Kingdom.

- **Tier 2: Consumer Content Markets**

In Tier 2 markets, Visit California invests in direct-to-consumer media to drive traffic to its owned channels to augment trade and public relations initiatives.

The Dream Big Dividend allows four markets to move into Tier 2: France, Germany, Japan and South Korea.

- **Tier 3: Trade & PR Markets**

In Tier 3 markets, Visit California reaches the consumer indirectly through trade and public relations initiatives and works closely with Brand USA to maximize its investment. Tier 3 markets include India, Italy, Scandinavia and the Middle East.

Global Brand Landscape

California is synonymous with abundance. Combined with California's unique brand character — the California Attitude — this positioning is the foundation for the state-wide global brand program. The Dream Big platform allows for greater consistency and connectivity from one execution to another, from one initiative to another, and across channels and markets, allowing the industry to build an even stronger global brand for California.

As Visit California continues to expand and enhance the industry's marketing program, a global brand messaging framework that allows for aspirational storytelling while also providing an opportunity to draw down to the experiential will fuel California's competitive advantage.

As a subset to the global messaging platform, brand experience pillars provide an organizing principle for the countless attractions, amenities and activities found across the state, and serve as a wayfinding construct to help consumers navigate content.

By drilling down the consumer audience within each pillar into specific personas, Visit California is able to develop effective core messaging and content most likely to resonate with them. These persona profiles distill the consumers' basic values, motivations and other considerations that inspire consumers and inform their behavior.

A driving tenet of the industry's global marketing program moving forward is development of branded content that can be easily accessed and shared across devices and screens. Coupled with Visit California's base of highly effective television commercials, Dream Big storytelling is brought to life through compelling made-for-digital video content that reinforces the brand premise — “we're for dreamers” — and celebrates the “if you can dream it, you can do it in California” attitude.

A central component of Visit California's global digital strategy is Dream365TV, which is sustained with ongoing paid, owned and earned program content. The Dream365TV content trajectory includes a balance of highly curated and original video content developed to round out a specific framework of distinct content types: limited events that feature top talent, anchors that serve as the core series on a weekly basis during programming bursts and original or curated theme videos that span California's pillar experiences. Dream365TV videos are released year-round on a schedule modeled after YouTube best practices.

Visit California leverages the passion and expertise of those already creating content about the state while continuing to invest in the creation of original content that differentiates the state and illuminates the Dream Big platform against an established sentiment framework.

Strategic Framework

Visit California's FY16/17 marketing plan includes a broad range of marketing activity designed to fuel inspiration and desire for the California brand globally. All initiatives are built on an "always on" foundation, which varies by market and aims to reach three primary audiences: consumers, travel trade and media professionals.

The program of work is designed to reach the specific audiences research has identified as including the greatest ROI potential, including:

- a broad global brand target, which takes into consideration age, income and travel propensity
- opportunity brand targets, which home in on key demographic niches, particularly households with children and high-income households
- passion-based targets, which aggregate people by interest.

Each audience layer is reached with programming designed specifically for their consumption characteristics.

Extensive research has shaped a suite of Global Brand Target Audiences, including the Super Affluent who have a propensity for travel and spend freely on authentic travel experiences, as well as the ever-important family segment looking for California to come to life.

To reflect continued shifts in consumer media consumption, Visit California's content program adopted a holistic approach that places an emphasis on consistency across distribution channels through a combination of entice- and inform-level content.

As travel trade continues to be a foundational component of marketing to consumers, educational tools continue to be expanded for key travel trade audiences and three global travel agent personas, developed through focus group research, allowing for better segmentation and targeted marketing.

Background

About Visit California

The California Travel and Tourism Commission, doing business as Visit California, is a 501(c)6 nonprofit corporation formed in 1998 to market California as a desirable tourism destination. Visit California works in close coordination with California's Office of Tourism – while Visit California conducts marketing programs that drive visitation, the Office of Tourism oversees the assessment program that helps to fund these initiatives.

The budget for California's tourism marketing is funded by investors in five industry segments:

- Accommodations
- Attractions
- Passenger Car Rental
- Restaurants & Retail
- Travel Services

For more information about Visit California, go online at industry.VisitCalifornia.com.

To be inspired about travel within the state of California, go online at www.VisitCalifornia.com.

Mission

Visit California is a nonprofit organization with a mission to develop and maintain marketing programs – in partnership with the state's travel industry – that keep California top-of-mind as a premier travel destination.

Vision

Visit California will be the recognized source for statewide marketing planning and implementation, and information and support to California's vast travel and tourism industry, thereby maintaining California's position as one of the world's preeminent travel and tourism destinations.

Key Objective

Maintain and increase non-resident leisure travel and spending in California.

California is the **No. 1 travel destination** in the United States — and the first state in the nation to have more than \$100 billion in travel-related spending.

Dreaming Big for California

Visit California was established in 1998 as a coalition of travel industry interests with the mission of developing marketing programs that keep California top-of-mind as a premier travel destination. And it's working.

In 2015, **more than 258 million visitors to the state spent \$122.5 billion, a 3.4 percent increase over 2014.**

This spending resulted in \$9.9 billion in state and local tax revenues and jobs for more than 1 million Californians. Workers in the tourism industry earned \$42.2 billion.

California is the No. 1 travel destination in the United States — and the first state in the nation to have more than \$100 billion in travel-related spending — more than entire countries such as Australia, Turkey, South Korea and Canada.

History

1998

- California Travel and Tourism Commission established as a private-public joint marketing venture.

2001

- Industry referendum renews Visit California with 84 percent approval.

2007

- Visit California renewed by a 91 percent margin.
- Gov. Arnold Schwarzenegger signs AB 2592 into law, creating an assessment program for the passenger car rental industry, resulting in a total marketing budget of \$50 million.
- Marketing programs broaden to include California Wine & Food, as well as rural- and snow-focused campaign platforms.

2010

- “Five-Year Strategic Marketing Plan” published.
- Visit California board begins global media analysis.

2011

- Visit California transitions to become a division of the newly formed Governor’s Office of Business and Economic Development (GO-Biz).

2012

- China Ready program launched to prepare industry for growing numbers of Chinese tourists.
- Visit California board leaders launch effort to explore increasing funding to attract emerging markets.

2013

- Industry renews Visit California with 93 percent approval.
- Board unanimously approves “Dream Big Vision” to pursue additional funds.
- Consumer marketing launches in China and Mexico.

2014

- Industry ratifies Dream Big Dividend assessment rates.

2015

- Industry committees convene to develop Dream Big Dividend Activation Plan, which was adopted at the May 2015 Commission Meeting.
- Visit California opens three new offices, adding to the two existing offices in China (Chengdu, Guangzhou, Taipei, Beijing, Shanghai).
- Visit California expands global social media footprint with the onboarding of ICUC, a social media community management agency.

The successful efforts of Visit California will increase desire and ability for travelers to come to the state, while raising the overall profile of California around the world.

Visit California serves as the industry leader for more than 100 regional destination marketing organizations (DMOs) and thousands of businesses in the state that make money from traveler spending. Working in collaboration with these partners, Visit California provides a statewide platform with scalable marketing programs and unified messaging DMOs can leverage to broaden the state's overall reach to consumers around the world.

Welcoming millions of new visitors strengthens the state — by creating jobs essential to the economy that provide opportunities for Californians. In fact, travel and tourism businesses produced 36,000 new jobs in 2015. The travel workforce earned a combined \$42.2 billion in 2015 — furthering the economic reach of the overall visitor spend.

Boosting tourism also encourages critical infrastructure improvements and attracts strategic investment in the state, including significant economic development.

Visit California's primary objective to increase tourism is supported by the following principles that guide the program of work:

Guiding Principles

1. Do what the industry cannot do for itself.

Visit California will provide a statewide marketing and communications platform to promote the California brand, as well as the value of tourism, to consumers and media around the world. Visit California serves as the foremost authority on the travel and tourism industry in California, as well as the issues affecting it, engaging in opportunities that will elevate the profile of the industry and the state overall. By unifying industry leaders to raise the relevance of the travel industry, Visit California aims to elevate elected officials' perception of the importance of the industry.

2. Deliver value to and collaborate with tourism-related businesses.

Visit California will be a resource to the state's DMOs and assessed tourism businesses by providing marketing opportunities, web leadership, authoritative tourism research, messaging framework, networking opportunities and other resources vital to the success of their operations.

3. Build awareness and preference for the California brand to stimulate travel.

Visit California will develop marketing programs that attract new consumers to California through the power of the California brand, while boosting the image of California overall. A diverse array of Visit California-developed marketing programs will provide industry partners with opportunities to reach new markets that are otherwise cost-prohibitive.

4. Leverage all assets and alliances.

Visit California will introduce the California brand to far-reaching audiences and establish strategic alliances with trusted in-market brands. Partnerships support efforts to develop relationships and elevate California's overall image, through the media and other venues, with the goal of raising perceptions of California across the globe.

5. Use key metrics and ROI to inform the strategic direction of the program of work.

Visit California will track and evaluate market penetration and program impact on attracting leisure travelers to reinforce organization's value to travel-related businesses, as well as the state of California.

Figure 1-1 Industry Committees

Visit California Board Of Directors

Marketing Advisory Committee

Brand & Content
Committee

Sponsorship
& Marketing
Committee

Rural
Committee

International
Committee

Research
& ROI
Committee

Public
Relations
Committee

Snow
Committee

Welcome
Centers
Committee

Gateway
CEOs

Crisis Task
Force

Airlift Task
Force

Editorial Task
Force

Industry Committees

In 2014, a new committee structure was implemented to guide the process of determining next steps following the Dream Big Dividend Competitiveness Initiative vote. The committees were born out of a pair of stakeholder meetings held in fall 2014 where DMOs, assessed businesses and other industry partners gathered for interactive workshops to discuss how the Visit California Marketing Work Plan will scale in the Dream Big Dividend funding environment. The groups reviewed Visit California's guiding principles, brand platform and overall content strategy, analyzed new research and the marketing allocation platform and discussed new opportunities for partnerships and incentive travel.

That work continues to play a pivotal role in directing how the Dream Big Dividend funds are spent, including development of the Visit California Work Plan, which is presented to the full Commission for a vote each spring.

Industry representatives also support a wide range of request for proposals(RFP) across all Visit California work, including participation with 12 RFPs in FY15/16 for international representation, advertising, content, digital and measurement activities.

The committees include:

- **Research & ROI:** Working to validate data and methodologies used to support development and measurement of Visit California's marketing programs, including new Dream Big programming. Also advises on allocation of research funds.

Chair: Kerri Verbeke Kapich | Senior Vice President of Marketing & Strategic Partnerships, San Diego Tourism Authority

Vice Chair: Sheldon Duncan | Vice President of Marketing & Insights, Universal Studios Hollywood

- **Brand & Content:** Evaluates marketing programs, focusing on consumer targeting and profiling, global consumer advertising and consumer content programming.

Chair: Ted Molter | Chief Marketing Officer, San Diego Zoo Global

- **Sponsorship & Marketing Programs:** Reviews sponsorship and cooperative marketing programs, focusing on non-endemic sponsorship strategy, platform cooperative marketing programs and campaign cooperative marketing programs.

Chair: Agnelo Fernandes | Senior Vice President Sales & Marketing, Terranea Resort

Vice Chair: Matt Stiker | Chief Marketing Officer & SVP of Sales, City Pass

- **International:** Monitors all economic and other influences on, as well as the effectiveness of, California's international marketing efforts, while weighing in on ways to leverage Brand USA's global activity.

Chair: Howard Pickett | Executive Vice President & Chief Marketing Officer, San Francisco Travel

Vice Chair: Kristen Esposito | Vice President of Tourism Marketing & Development, Simon Property Group

- **Public Relations:** Assesses global consumer PR programs with emphasis on earned media, as well as ways to scale PR programs for the Dream Big budget.

Chair: Tim Zahner | Chief Marketing Officer, Sonoma County Tourism

- **Rural:** Reviews rural marketing program, including the Rural Regional Grant Program, Multi-Regional Grant Program and Beyond the Gateway destination positioning.

Chair: Ashlee Ciora | Vice President of Travel Industry Sales, Greater Palm Springs Convention & Visitors Bureau

Vice Chair: Terry Selk | Executive Director, Yosemite/Mariposa County Tourism Bureau

- **Snow:** Provides guidance on winter-specific marketing activity, including timing, messaging and content creation.

Chair: John Urdi | Executive Director, Visit Mammoth