

FINDING TRUE NORTH: Tourism's Decade of Change





STATE OF THE INDUSTRY California tourism is strong.



What does the future hold?

THEN AND NOW Three Evolutions







TOURISM INDUSTRY VISIT CALIFORNIA





California is a global brand

CALIFORNIA Design of Freedor

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Diversity & Inclusivity

say California is more welcoming

90%

are likely to visit at some point



CALIFORNIA #ALLDREAMSWELCOME

California dream

THEN AND NOW Three Evolutions



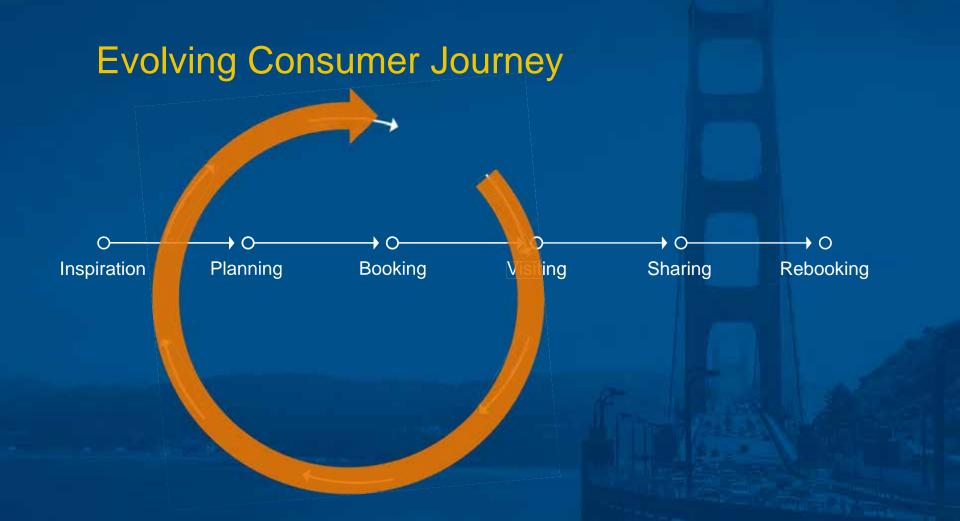




Immersive Content











Millennial Traveler Profile





Waiting Longer to Have Kids

Higher Incomes





Largest Segment of Ad-Influenced Trips Greatest Affinity for California



THEN AND NOW Three Evolutions







Global Brand Architecture















Evolving Consumer Journey



BRAND USA VISIT CALIFORNIA INDUSTRY PARTNERS

Strategic Framework

TARGET AUDIENCE

Narrowcasting Strategies

Broad Reach Strategies

PAID OWNED EARNED TRADE SHARED

"The future is narrowcasting"

REUTERS 🎲





@_ryandthomas_

"Follow the road that leads to the best sunsets"#discoverla #visitcalifornia



INTEGRATED PROGRAM REJURN

Program Measurement

Inited Kingdom

Mexico

Canada FY17/18

China

United States

Brand Family Owned Earned

Trade & Partnerships

Global Brand Target

Adults | Top 33% Household Income | 108 Million Individuals

Opportunity Target 36% of Brand Target

Millennials + Kids

🙀 Millennials

Experiences Segmentation

Outdoor Family Culinar Luxury Entertainment y & Culture







Brand Family Owned Earned Trade & Partnerships







CALIFORNIA NOW-

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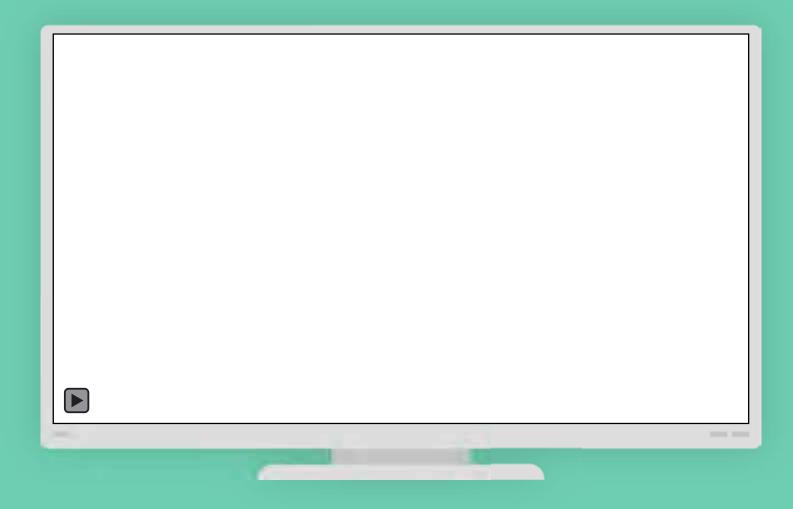












224 Million Views

Now Liking orders @CaliforniaDreamEater





TimeInc. FOUNDATIONAL **INDUSTRY-FOCUSED HERO-SUPPORT INSIGHTS-LED NEEDS-BASED**

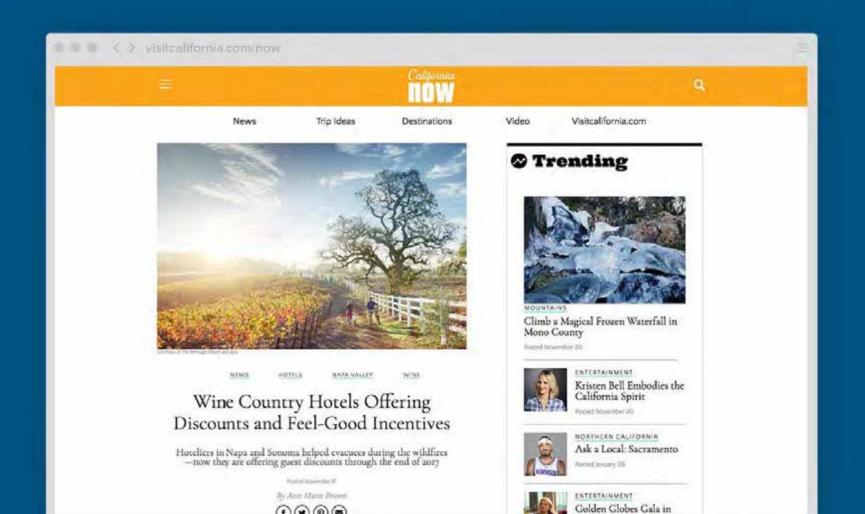
'Bleisure' Opportunity

17% Bleisure

20% Business 63% Leisure

INTERNATIONAL MILLENNIALS







Hello



Soterios Johnson



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Our mornings just won't be the same without SoJo's mojo. Best of luck to @SoteriosJohnson, and congrats to @ucdavis on landing a NYC legend.

7:48 AM - 26 Aug 2016

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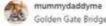
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Brand Family Owned Earned Trade & Partnerships







Golden Gate Bridge

Follow

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1,768 likes

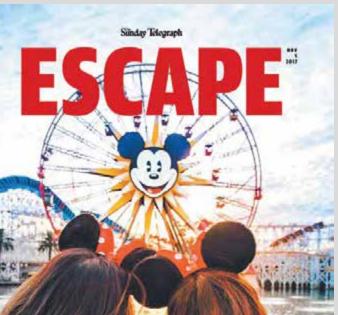
mummydaddyme New favourite photo. Second Se Francisco without getting a photo with the most famous bridge in the world. Someone offered to take our photo on my phone, normally we just say no thank you as we have so many as it is, but I'm so glad we didn't this time. I just love it. This is such an incredible adventure for us, I still can't believe we are here and I know I'm going to treasure this photo forever. We hired biker and cycled over the Golden Gate





myteomene These two certainly do DREAM BIG. Televi in the Quintesidomia Holdramia stand at Beamphoistual, Effantistatuk Pranziestvat

QQ 48 liber



Digital Influencers



Influencer Marketing

Traditional Digital Marketing





























Brand Family Owned B2B2C Earned Trade & Partnerships







Canon



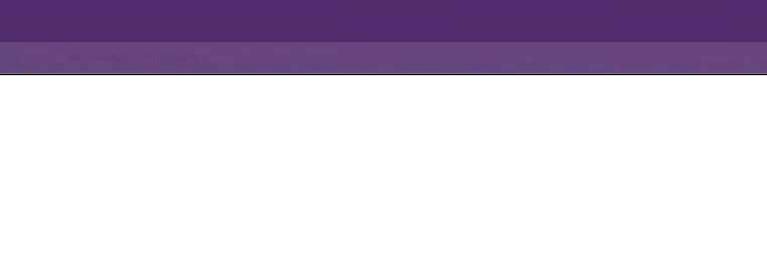
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Hello



Rannvijay Singha





TOURISM & CONVENTION BOARD



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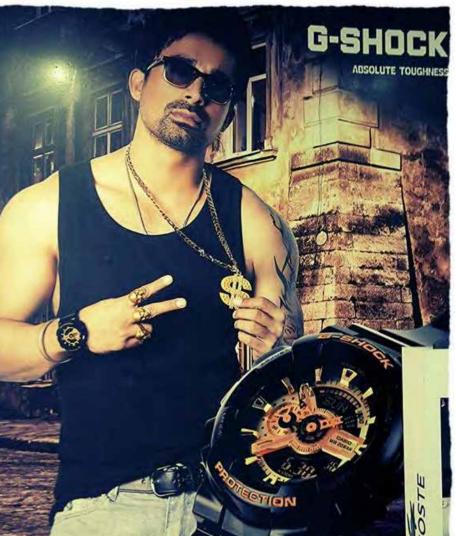
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Responsible Mobility Partner



OHNNIE WALKER





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Travel Always Matters

California's Top Export

\$25.2 Billion

International Visitor Spending \$20.69 Billion Agriculture \$7.3 Billion Civilian Aircraft \$6.96 Billion Voice/Image/Data Equipment

\$5.5 Billion Non-industrial Diamonds

Electrical Machines

\$3.3 Billion





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