

all *dreams* welcome

INDUSTRY TOOLKIT



Mexico & Canada



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All Dreams Welcome Key Messages

Optimizing Visit California’s ‘Dream Big’ brand platform and “Living the Dream” campaign to deliver a welcoming message — in authentic, genuine, irreverent Golden State style.

Background

California depends heavily on tourism from international visitors who, in 2016, were collectively responsible for more than \$25 billion in spending. Recent national policies are negatively affecting sentiment among likely travelers to the United States. So now, more than ever, it is critically important that California is perceived as a welcoming destination among visitors from California’s key international markets. Visit California developed an “All Dreams Welcome” communications strategy and deployed a multi-pronged messaging campaign to proactively address the current climate and preempt further negative impacts on the state’s tourism industry.

“All Dreams Welcome” adapts California’s global Dream Big brand 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. It is a delicate assignment that must walk a tightrope between:

- Communicating a welcoming message with international audiences
- Supporting the efforts of focusing on the safety of America

Strategic Approach

The “All Dreams Welcome” platform leverages Visit California’s significant global brand investment, and, while not political in nature, targets our key international markets. Intelligence gathered from Brand USA’s travel sentiment reporting tool helped hone in on immediate impacts from key markets in order to develop a nuanced messaging strategy that addresses country/region-specific challenges. Designed to “roll out the red carpet” for all visitors and drive home the point that California and the California brand stand apart, the campaign welcomes any and all who dream big. The campaign highlights achievers from other countries who have fulfilled their dreams and achieved success living and working in California to illustrate the state’s anything-is-possible ethos and vibrant melting pot culture.

The “All Dreams Welcome” messaging has been integrated into as many elements of Visit California’s existing consumer-facing marketing tactics as possible. The multi-pronged initiative relies heavily on PR, with additional paid digital and social content components, as well as activations using owned channels in select international markets. Opportunities have been created for industry partners from co-ops to executive leadership in-market missions.

All Dreams Welcome Key Messages

California is the most diverse state in the United States. We have always celebrated openness and diversity.

- The foreign-born population in California is 10.5 million individuals, or 27.3% of the state's residents. That's more immigrants than any other state in the nation and more than twice the national average (13.5%).
- With nearly 150,000 students, the state has the highest number of international students enrolled at its post-secondary institutions. New York and Texas are a distant second and third with 114,316 and 82,184 international students respectively.
- California has the highest percentage of business owners who are foreign born (36.6%).

The world has always looked to California as a land of boundless opportunity — a place where you don't just dream, you "dream big." The California spirit drives unmatched creativity, innovation and imagination.

- Many of the world's most successful companies were founded by first-generation immigrants or their children. Google (Sergey Brin/Russia), eBay (Pierre Omidyar/France), Yahoo (Jerry Yang/Taiwan), Intel (Andrew Grove/Hungary) and Tesla (Elon Musk/South Africa) were all built in California.
- The State's artistic community draws its strength from international roots — this includes artists who made California their home: Frank Gehry (architect/Canada), Charlize Theron (actress/South Africa), Wolfgang Puck, (chef/Austria), Carlos Santana (musician/Mexico), Portia de Rossi (actress/Australia) and Christian Bale (actor/Wales).

Visit California's "All Dreams Welcome" message, the spirit of limitless possibility and the state's magnificent beaches, mountains, cities and deserts draw people from across the globe.

- In the current year, Visit California will spend more than \$42 million to share a welcoming message in 13 international markets (Australia, Brazil, Canada, China, France, Germany, India, Italy, Japan, Mexico, Scandinavia, South Korea and the United Kingdom).

The U.S.' Visa Waiver Program is intact.

- The new administration has not yet made any changes to the current visa program. There is a lot of talk about changes, but there has not been any legal change to date.
- The only policy change is about the legality of bringing electronics on flights from eight countries.
- The Visa Waiver Program enhances security, facilitates better relationships with countries that are a part of the program — including most of California's top international markets — and is essential to travel to the United States.

Visit California's "All Dreams Welcome" message, the spirit of limitless possibility and the state's magnificent beaches, mountains, cities and deserts draw people from across the globe.

There are far bigger influences on where people travel than politics.

- The economy is the leading influence. If people have money to spend and transportation is affordable, they will travel.
- Security and stability are also critically important.
- Visit California is NOT a political organization.
- We're here to inspire people from all over the world to come to California and experience life to the fullest.

Connections: Key Links Between Mexico and California

Why focus on Mexico?

Mexico, California's largest international market by volume, is experiencing an unprecedented socio-political moment. The current political environment in the U.S. has caused concern across all socioeconomic levels, impacting the economy, outlook and consumer confidence. Although the sentiment of uncertainty spans the globe, in Mexico, it is influenced by the multitude of bilateral agreements with the United States and the singling out of current and future policies.

Key factors contributing to the current overall national sense of uncertainty in Mexico include:

- On January 1, 2017, a national 20 percent increase in gasoline prices stemmed from the deregulation of the energy sector.
- The accelerated weakening of the Mexican peso reached an all-time low of 22.04 against the U.S. dollar — a 20 percent devaluation over the past year.
- Political uncertainty in the U.S. government and uneasiness over possible U.S.- imposed automobile and manufacturing tariffs.

While tour operators and agencies are reporting that consumers are continuing to book travel — and California's strong market share and proximity greatly benefit the destination — travel from Mexico to California is going to be impacted.

1. The influence of Mexico and the Mexican culture on California is undeniable, influencing language, food, music, architecture and more, even before California became a state.
2. California and Mexico share 140 miles of border along the state's southern edge and the northern edge of the Mexican state of Baja California.
3. The San Ysidro border crossing between Tijuana and San Diego is the busiest border crossing in the Western Hemisphere, with more than 33 million people entering California every year — just 6 million shy of the entire population of the state.

4. With California being a minority-majority state, Latinos make up the largest single ethnic group in the state, with the majority of Latinos of Mexican ancestry — the highest total number of any U.S. state. California's Mexican population is also the highest in the country, making up approximately 40% of the population.
5. Spanish is California's second most spoken language, after English and is the state's "alternative" language.
6. There are 4.3 million Mexican-born residents currently residing legally in California.
7. In California, nearly 700,000 jobs depend on Mexico-U.S. trade and investment.
8. Mexico is California's top market for exported goods and services, making up for 16% of total exports into Mexico, and accounting for more than \$25 billion. Computers and electronic products remained California's largest exports, accounting for \$6.7 billion. Transportation equipment totals \$2.9 billion and machinery accounts for \$2.1 billion. Other top exports include food manufactures and agricultural products.
9. California imports \$46.4 billion in goods from Mexico annually. The top import categories are transportation equipment, computer and electronic products, agricultural products, and manufactured commodities. California is the second largest importing state for goods from Mexico.
10. The state's creative community is well-represented by Mexican and Mexican-American artists are either from or currently reside in California. Well-known names include:
 - Carlos Santana (musician)
 - Joan Baez (musician)
 - Salma Hayek (actress)
 - Danny Trejo (actor)
 - George Lopez (actor/comedian)
 - Mario Lopez (television personality)
11. In addition to sharing tastes in food, Mexicans and Californians share a love of wine and spirits. With more than 100 wineries across the country, California's immediate neighbor, Baja California, produces nearly 90% of Mexico's wine. More than wine, Mexico is famous for its tequila and Californians consume the most tequila in the U.S. — more than 27 million bottles a year!

Connections: Key Links Between Canada and California

Why focus on Canada?

Canada is key source of inbound travel to California. Three major challenges are putting downward pressure on the Canadian market:

- A perception that the U.S. is unwelcoming;
- the strong U.S. dollar making travel more expensive for Canadians; and
- the country’s 150th birthday, which is being marketed as a reason for residents to travel within their own country.

California’s tourism industry has an opportunity to offset the negative sentiment toward travel to the U.S. by positioning California as a welcoming destination.

1. The two places are similar in population but vastly different in land mass. Canada is more than twenty times larger than California.

	Canada	California
Population	35.1 million	38.8 million
Land Mass in square miles	3,855,103	163,696

2. Canada and California share similar attributes of ethnocultural diversity. In Canada, 20.6% of the total population is foreign-born, the highest proportion of any G-8 country. In California, the number is even higher with 27.3% of the population is foreign-born.
3. There are more than 130,000 Canadian-born residents currently residing in California.
4. Over 1.1 million jobs in California depend on Canada-U.S. trade and investment.
5. In 2016, California was the top destination for Canadian meetings professionals planning events in the U.S., and accounted for 35% of all meetings planned in the U.S.
6. California imports an estimated \$27.8 billion of products from Canada annually (second only to China). Familiar imports from Canada include automobiles, plastics, animal meats, forestry products, furniture and bedding.

7. Canada has remained California’s second largest export market since 2006, with a total value of over \$16.2 billion in 2016 (9.9% of all California exports), as well as exporting \$9.2 billion in services to Canada. Computers and electronic products remained California’s largest exports, accounting for 32.2% of all exports to Canada. Exports of agricultural products and food manufactures from California to Canada totaled \$3.6 billion; with transportation equipment and chemicals continuing to be strong export sectors as well.

8. Canadian companies with major operations in California include Bombardier, Onex Corporation, CGI Group, Manulife Financial Corporation and Valeant Pharmaceuticals/Bausch & Lomb. An estimated 37,300 Californians are employed by Canadian-owned businesses.

9. Sometimes referred to as “Hollywood North,” Canada has a burgeoning film industry with major studios in Toronto and Vancouver. And in back in California, Hollywood elite circles are including more Canadian actors, producers and filmmakers. The state’s creative community is well-represented by artists born in Canada and currently residing in California. Well-known names include:

- Bob Blumer (chef/TV host/author)
- James Cameron (director)
- Jim Carrey (actor/comedian)
- David Foster (musician/record producer)
- Frank Gehry (architect)
- Ryan Gosling (actor)
- Wayne Gretzky (athlete)
- Alanis Morissette (musician)
- Sandra Oh (actress)
- Ellen Page (actress)

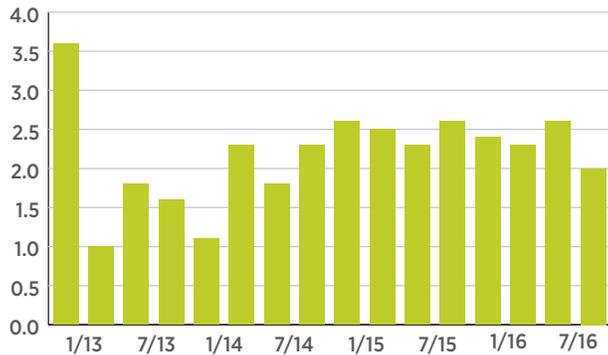
10. Finally, Canadians seem to love “the grape as much as Californians! There are more than 700 licensed wineries in Canada, with several of its wine-producing regions in Ontario and British Columbia. That’s more wineries than any other U.S. state with the exception of California (with 3,782 licensed wineries).



Market Conditions

MEXICO GDP QUARTERLY GROWTH RATE

Percent Change in Gross Domestic Product



- Mexico is a growing economic powerhouse, particularly in the energy, electronics, automobile and consumer goods manufacturing sectors
- Mexico's economic outlook looks good, with GDP growth expected to accelerate and unemployment to decline at the end of 2016 as structural reforms take effect and facilitate foreign investments
- Analysts expect GDP to close at 2.4 percent at the end of 2016
- Mexican carriers continue to gain market share in the international market: for the first time in many years the home carriers achieved more than 30 percent of total international traffic

Source: Focus Economics

EXCHANGE RATE

1 Mexico Peso Equals 0.049 U.S. Dollar



Source: 12/16 xe.com

- The Mexican peso reached a record high of 20.77 in November 2016. Additionally, with the exchange rate, activities such as shopping and extra spending could be impacted with the higher cost with the record high exchange rate.

Competitive Landscape

- Canada Visa cancellation and increase in flights to key destinations in Canada will attract more Mexican visitors
- Inexpensive U.S. destinations like Texas and Florida continue to be a threat
- Domestic travel is increasing due to heavy domestic promotion and U.S. dollar exchange rate

Top 2015 Spenders

- **Panama:** \$696,000
- **Buenos Aires:** \$2.64M
- **Las Vegas \$1.4M**
- **Colorado:** \$921,000
- **Texas:** \$467,000

Sources: Adspen; Ibope; Nielsen (no paid TV or digital reported)

Risk Factors

- President Trump's administration increases uncertainty

Market Barriers

- Peso exchange rate is a concern and could impact length of stay and spend
- Proximity to California results in a perceived familiarity
- Increased marketing efforts by competing destinations, especially Canada

Airlift

- 530 weekly flights
- 83,684 weekly seats to California
- Nonstop service to 11 California destinations and connecting flights are mainly through Houston, Dallas, Phoenix

Booking

- Planning cycle – Jan.-March, April-May, Aug.-Sept. Booking pattern March, May-June, Sept.-Nov.
- Main travel seasons are Easter (March or early April), Summer (mid July-end Aug), Christmas (correspond to school holiday periods)
- Approximately 46 percent book with airlines directly, closely followed by traditional travel agencies at 25 percent and online/online travel agencies at 22 percent
- Over 35 operators carry California vacation packages

Travel Profile — Air

(TOTAL)

\$596M 2016 P Visitor Spending

24.4% 2015 California Market Share

554K 2016 P California Visits

520K 2017 F Visits **-6.2%**

557K 2020 F Visits **+0.6%**

\$646M 2020 F Spending

P = projected; F = forecasted

Sources: U.S. Department of Commerce; Tourism Economics

Leisure Traveler Profile

(83% OF TOTAL)

	INDEX*
78% Vacation/Holiday.....	116
53% Hotel/Motel.....	72
8 California Nights — Average Length of Stay.....	63
\$1,102 Per Trip.....	55
1.9 Destinations Visited.....	61
1.7 Party Size.....	100
17.7% Travel With Children.....	132

*Index compares to total overseas travel to California

Sources: U.S. Department of Commerce; CIC Research, Inc.

Target Profile

PRIMARY TARGET

- Top 33% HHI
- Passionate about or regularly travel abroad
- Travel by air for vacation 1+ times annually
- Vacation decision-making involvement

Source: Carat CCS

DEMOGRAPHICS

- 39 — Median age
- Highest income tercile
- Married (54% / Index 150) and have children (70% / Index 140)

Brand Foundation

CALIFORNIA ATTITUDE: California represents the American Dream, a land with a particular attitude and energy, where big dreams come true

ABUNDANCE: California is a land of epic proportions

Other Market Insights

MARKET

- Travel driven by leisure and visiting friends/relatives purpose trips

PRODUCT EXPERIENCE

- Increased long weekend travel provides California an opportunity
 - Summer school holiday periods are shortening (only five weeks), leading to increases in long weekend travel

AUDIENCE

- Travelers are seeking new experiences beyond the familiar
 - Mexican consumers seeking new travel opportunities beyond the familiar shopping and theme park trips; greater interest in niche, experiential travel

COMMUNICATION

- Continued increase in online connectivity
 - People are more connected than ever, with increased access across many devices, especially smartphones
- Online video rising in importance
 - Online video has become a key channel for consuming content

Brand Platform

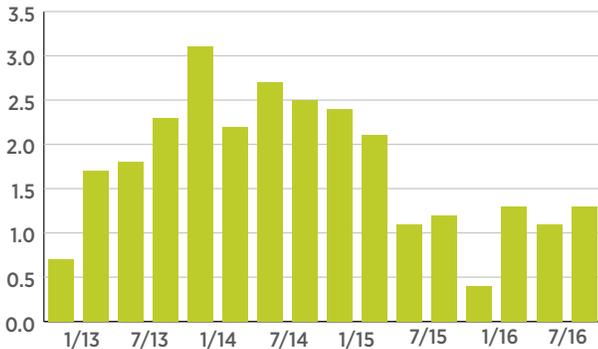




Market Conditions

CANADA GDP QUARTERLY GROWTH RATE

Percent Change in Gross Domestic Product



The fragile and uncertain global economic environment has weighted on Canada's economy. Since 2013, growth in Canada has slowed to below 2 percent on average, and the sharp decline in global crude oil prices since the end of 2014 has placed more significant downward pressure on the economy.

Looking ahead, however, the Canadian economy is well-positioned to begin recovering from the global oil price shock, gain traction and post more solid GDP growth and job creation.

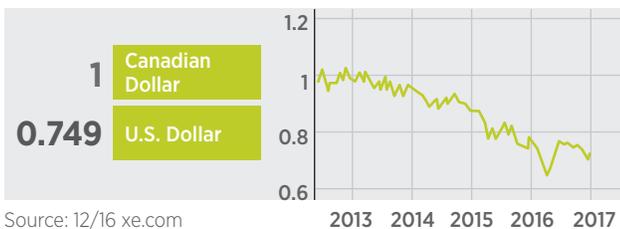
As the economy gradually adjusts to weaker commodity prices, a lower Canadian dollar and ongoing growth in the U.S. economy are offering some support. Canadian exports have shown signs of improvement – particularly forestry products, motor vehicles and consumer goods.

Private economies have revised down their near-term outlook for real GDP growth and GDP inflation, and now expect real GDP growth of 1.4 percent in 2016 and 2.2 percent in 2017. The average growth between 2016 and 2020 is expected to be around 2 percent.

Sources: The Conference Board of Canada; Government of Canada

EXCHANGE RATE

1 Canadian Dollar Equals 0.749 U.S. Dollar



Source: 12/16 xe.com

- The Canadian dollar continues to struggle due to the collapse in crude oil prices
- In 2017, the Canadian dollar could decline to as low as 70 cents U.S., in part due to the President-elect's economic agenda

Risk Factors

Overall, Canada has low economic risk and political stability

Competitive Landscape

- The United States remains the top international destination for Canada by a large margin. Mexico, United Kingdom and France round out the next top three most popular and visited international destinations. Following a couple of years of decline, leisure trips to the United States are forecast to return to a more normal growth scenario in 2017.
- Canada is preparing for its sesquicentennial (150th) birthday celebration in 2017 which will encourage Canadians to travel closer to home. Numerous new products and entertainment are being developed such as free admission to all National Parks for all of 2017.
- Higher annual proportions of overseas travel from Canadians are expected to continue in the short-term.
- All-inclusive sun destinations continue to be popular given the exchange rate, especially during the winter season.

- **Culinary:** New York, Las Vegas, France
- **Entertainment:** New York, Las Vegas, London
- **Family:** Florida, Mexico, Canada
- **Luxury:** Hawaii, New York, London
- **Outdoor:** Canada, Hawaii, Florida

Top 2015 Spenders

- **Ontario:** \$3.32 million
- **Newfoundland:** \$2.77 million
- **Michigan:** \$2.15 million
- **Manitoba:** \$1.72 million
- **Nova Scotia:** \$1.59 million

Source: Nielsen

Market Barriers

- There is some uncertainty in Canada based on the new President Trump administration and continued lower exchange rates which is causing continued caution in spending and travel to the United States.
- The staycation trend in Canada continued to grow in 2016 with tourism spend by Canadians travelling in Canada growing in part due to the weaker loonie and lower gas prices.
- Canadians familiar with California have created a pattern for repeat visitation and the challenge is to create awareness beyond the gateways to draw new and return visitors and disperse travel.

Sources: Statistics Canada, The Conference Board of Canada

Travel Profile

(TOTAL)

\$2.08B 2016 P Visitor Spending

7.6% 2015 California Market Share

1.6M 2016 P California Visits

1.6M 2017 F Visits **+1.0%**

1.7M 2020 F Visits **+7.9%**

\$2.3B 2020 F Spending

P = projected; F = forecasted

Sources: U.S. Department of Commerce; Tourism Economics

Leisure Traveler Profile — Air

(67% OF TOTAL)

50.9% Vacation/holiday

16.5% Visits friends/relatives

30.5% Hotel/motel

10.4 California Nights — Average Length of Stay

\$1,317 Per Trip

3.5 Destinations Visited

1.9 Party Size

18% Travel with Children

Sources: Statistics Canada, Tourism Economics

Target Profile

PRIMARY TARGET

- Top 33% HHI
- Passionate about or regularly travel abroad
- Travel by air for vacation 1+ times annually
- Vacation decision-making involvement

Source: Carat CCS

DEMOGRAPHICS

- 46 — Median age
- \$124K — Median HHI
- More likely to be married (60% / Index 131) and have children (59% / Index 109)

Brand Foundation

CALIFORNIA ATTITUDE: California has an enviable lifestyle, where work is balanced with play

ABUNDANCE: California is superlative, with the best of everything in one place

Booking

- Planning timeframe: 1-4 months; shorter in Western Canada vs. Eastern. However, the booking window is starting to shorten due to safety and waiting for last-minute deals. 52 percent of Canadians travelers research multiple destinations when they begin their booking journey. Over 60 tour operators package California in the Canadian market. Canada average number of days of search to book is 35 and the average number of days of book to stay is 63.2.

Other Market Insights

MARKET

- California continues to be a top desired destination for Canadians
 - In 2015, California accounted for 7.8 percent of all Canadian visitors to the United States, an increase from 7.1 percent in 2014
- Increases in air capacity and moderately strong economies benefit California
 - California tourism is expected to benefit from increases in direct air capacity as well as moderately strong economies in British Columbia and Ontario over the next five years
 - The majority of Canadians visiting California are coming from British Columbia (35.3 percent) and Ontario (24.5 percent)
- Canadian travelers desire more personalized and authentic experiences that offer self fulfillment
 - Canadians look to experiences to find enjoyment, self-fulfillment, and reward, with a staggering 93 percent of Canadians preferring a life filled with great experiences over beautiful possessions

PRODUCT EXPERIENCE

- Sightseeing, shopping, beach, nature and culture are trip motivators
 - In terms of vacation activities, Canadians tend to book trips that include sightseeing (64 percent), shopping (49 percent) and relaxing on the beach (45 percent), and also seek out nature and culture
- Canada is the sixth-largest market for top spenders in the luxury segment driven by the 45-55+ demographic

Sources: The Conference Board of Canada; media/corps; yahoo.com

Brand Platform



Media Q&A

Focus on Canada and Mexico

1. Let's talk about "tourism in the age of Trump." What impact is the new President having on international visitors?

First things first — Visit California is not a political organization. Nor are the marketing organizations we partner with and support throughout the state. We're here to inspire people from all around the world to come to California and experience the trip of a lifetime.

But there is a strong concern among the state's travel industry about a "Trump Slump" negatively impacting international visitor arrivals. And we are taking active steps to offset the potential impact of the new administration's policies and rhetoric.

2. Is politics on the radar of potential visitors?

Consumer research suggests there are bigger influences on why, where and how people travel than politics. The economy is the biggest — if people have disposable income to spend and transportation is affordable, they will travel. Personal safety and security are also critical decision factors.

Among Visit California's target international markets, Mexico is the most sensitive to the current U.S. political environment. As a direct result of proposed policies and Trump "build-a-wall" rhetoric, the United States is viewed as unwelcoming.

However, there are especially strong cultural ties between California and Mexico. California has a population of 12.6 million Mexican-Americans — the largest in the country. Governor Brown has repeatedly indicated a welcoming and inclusive message to our neighbors in Mexico.

California's tourism industry is incredibly resilient. We have survived and thrived despite a host of natural and manmade disasters over the years. There is a global desire to travel to America - and California in particular — and we will continue our marketing efforts to welcome the world to "Dream Big" in California.

3. Have you seen a drop in visitor arrivals since Donald Trump took office?

Official visitor arrival numbers from Mexico have not yet been released, but anecdotal evidence from travel trade professionals suggest there has been a significant drop in air arrivals (some estimates are as high as a 20% decrease) in the early days of the Trump Administration.

To the north of the U.S., over 3.6 million Canadians visited the United States in January 2017 — the highest single month in the past two years according to Statistics Canada. These early numbers are encouraging, but it is too early to tell if Canadian tourism to the U.S. and California will be negatively impacted by the impact of the new administration's policies and rhetoric.

4. What is the "All Dreams Welcome" initiative? Why is Visit California launching this now?

The state's tourism industry wants to send a clear and powerful message to potential visitors in Mexico, Canada and the rest of the world: California is an open, progressive and inclusive destination. And regardless of discussions about "travel bans" and "walls," a warm welcome awaits all international and domestic visitors to the Golden State.

America's "Left Coast," as we are sometimes called, welcomed 17.6 million international visitors in 2016. The state's tourism industry is wide-open for business.

5. How is the initiative being implemented in Mexico and Canada?

In the current fiscal year, Visit California will spend \$3.4 in Mexico and \$3.8 million in Canada to attract visitors to the Golden State.

An "All Dreams Welcome" campaign will celebrate the state's culture of openness and communicate a positive message of California's open doors. The program will include a Canada-Mexico marketing mission to embrace consumers, the media and travel trade in both countries. The mission will visit both Mexico (May 21-24) and Canada (May 24-26).

Along with California's four gateway cities (San Francisco, Los Angeles, San Diego and Anaheim), a consumer-facing initiative from Visit California will showcase the state's "everyone is welcome" culture.

6. Where is funding for the initiative coming from?

The sole source of Visit California's budget is from assessed business (e.g. hotels, rental car companies, restaurants and others) in the travel and tourism industry. Visit California does not receive any government funding.

7. How many Mexican and Canadian visitors travel to the California each year?

An estimated 7.9 million "person-trips" from Mexicans visited California in 2016 with 554,000 of those visitors arriving via air. Over 1.6 million Canadians arrived in California last year.

#alldreamswelcome Social Media Toolkit

Distribution Plan

The All Dreams Welcome video will be featured on Dream365TV (www.visitcalifornia.com/dream365tv/all-dreams-welcome). Visit California will promote the video through Facebook, Instagram, and Twitter.

Follow along and join in the conversation on social media with Visit California:

- Facebook: Visit California
- Twitter: @VisitCA
- Instagram: @VisitCalifornia
- Pinterest: @VisitCalifornia
- YouTube: @VisitCA
- Pinterest: @VisitCalifornia
- Hashtag: #AllDreamsWelcome

Leveraging All Dreams Welcome in your region

Here are a few helpful tips to maximize the benefit to your region and destination:

- Promote Visit California's All Dreams Welcome video to your followers
- Share our All Dreams Welcome video and content (see below) with your followers
- Tag Visit California in your posts
- Hashtag: Use the #AllDreamsWelcome hashtag in your posts
- Notify your partners of the video
- Add the All Dreams Welcome video to your website
- Link back to VisitCalifornia.com
- Join in the conversation on social media with Visit California with the hashtag #AllDreamsWelcome
- Engage your industry partners and encourage them to join in the conversation on social

Sample Posts for Social Media

Visit California's Messaging

Facebook / Twitter / Instagram: Welcoming the dreamer in you. What's your California dream? #AllDreamsWelcome



Industry Messaging Examples

There are additional images that you can use in combination with the video. Images can be found in the tool kit at industry.visitcalifornia.com/alldreamswelcome. Please also continue to look for images from your social community feed that contains a similar message.

- Welcoming the dreamer in you. What's your California dream? #AllDreamsWelcome
- Welcoming every kind of dreamer. #AllDreamsWelcome
- Always dreaming. Always welcoming. #AllDreamsWelcome
- Keep on dreaming in the Golden State. #AllDreamsWelcome
- Inviting you to dream big. #AllDreamsWelcome
- California welcomes every kind of dreamer. #AllDreamsWelcome

Website Content for Sharing

Please see our list of articles that echo our messaging of All Dreams Welcome. Feel free to use any of these articles to help strengthen your messaging.

Theme: Fulfilling one's dream in California

- [Ayesha Curry CA Questionnaire](#)
 - * A Canadian-American chef who now calls San Francisco home.
- [Ludo Lefebvre Dreamer Video](#)
 - * Born in France, Ludo Lefebvre has since moved to Los Angeles, and has quickly become one of the city's most influential chefs.
- [Ricardo Breceda Dreamer Video](#)
 - * Ricardo Breceda was born in Mexico, but now resides in Borrego Springs.
- [Atelier Crenn](#)
 - * French chef Dominique Crenn brings the best of the regions farm-to-table bounty to San Francisco.
- [Noriega Hotel](#)
 - * Basque cuisine can be found woven into the community of Bakersfield.
- [Central Coast Missions](#)
 - * California's historic Spanish roots can be discovered through its beautiful missions.

Diverse Audiences/Subjects

- [How to Hack Comic-Con](#)
- [How to Experience the Summer of Love](#)
- [6 LGBT Getaways](#)
- [Chloe Kim Dreamer Video](#)
- [8 Great Learning Vacations](#)

Culinary

- [8 California Food Trends](#)
- [Great LA Food Trucks](#)
- [Ethnic Treasures in Anaheim](#)
- [San Diego's Latin Food Fest](#)
- [Olvera Street](#)
- [Gabe Garcia CA Questionnaire](#)
- [Brian Huskey California Questionnaire](#)
- [CA Grown Olive Farmers](#)
- [CA Grown Pistachio Farmer](#)
- [Best Airport Cuisine](#)
- [Top Food Beer, Wine, & Food Festivals](#)

California's Welcoming Spirit

- [Welcome to Kidifornia Support Content](#)
- [Living the Dream Support Content](#)

Brand sentiment research

Objective

Visit California commissioned ORC to conduct brand perception research to address questions around the impact of the current political environment on potential travel to California.

Study details

The survey was conducted in May 2017 — and included 1,000 respondents in Visit California's five international Tier 1 markets: Canada, Mexico, China, United Kingdom and Australia.

Questions asked in the survey mirrored those used in research by Brand USA and Discover Los Angeles to allow for comparison of data across destinations. The survey will be periodically administered to track trends over time. The following results constitute the baseline survey.

Key takeaways

- International travel is still a key priority for Visit California's Tier 1 markets, with nearly three-quarters of adults (73%) 18-54 surveyed indicating they are likely to travel internationally in the next 12 months.
- California is still in the consideration set for consumers surveyed, with nearly 90% of respondents saying they are likely to visit California "at some point" in their lives.
- Differences arise in the timing of these visits:
 - * In the next two years: China (73%) and Mexico (68%) are likely to travel, while less than half in Canada (43%), Australia (37%) and the United Kingdom (36%) are likely to travel.
 - * California is considered an especially welcoming destination in the U.S., with the majority of respondents (56%) agreeing California is much more or somewhat more welcoming than the rest of the USA as a whole.
- * This perception is highest amongst consumers in Mexico (69%) and China (65%).
- * The current political climate in the U.S. makes it less likely for 32% of respondents to visit California on holiday.
- * The influence is greatest in North America, where about 1 in 5 Canadian (18%) and Mexican (22%) consumers indicate they are significantly less likely to visit.
- * The same is true for only about 1 in 10 Australians (13%) and Britons (8%), and less than 5% of Chinese (3%).
- Among respondents not likely to travel to California in the next two years, there are a variety of obstacles. Top reasons vary by market including:
 - * Wanting to visit other countries first (Australia – 34%)
 - * Wanting to save money for a trip (United Kingdom – 29%)
 - * It's a big trip I want to plan well in advance (China – 54%)
 - * Unfavorable exchange rate (Canada – 42%)
 - * The influence of the political climate (Mexico – 33 %)

California Brand Perception Research

ORC conducted brand perception research in May 2017 for Visit California to address questions around the impact of the current political environment on potential travel to California. Survey questions were asked of 1,000 respondents in Visit California's five international Tier 1 markets (Canada, Mexico, China, the United Kingdom and Australia).



73%

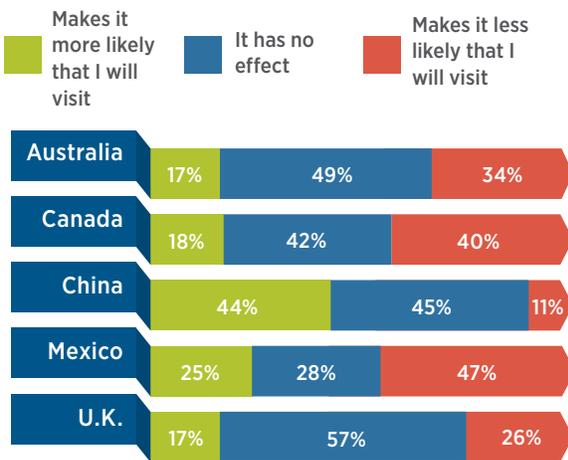
of those surveyed say they are likely to travel internationally in the next 12 months



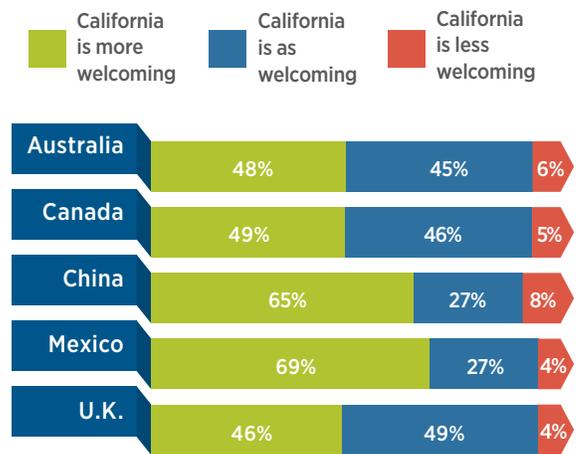
90%

say they are likely to visit California "at some point" in their lives

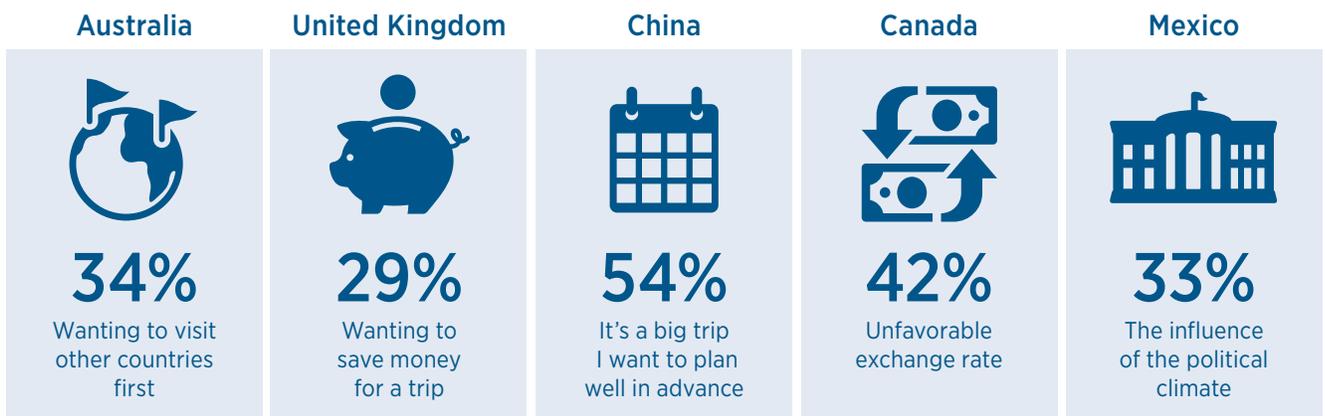
How much influence does the current political climate in the U.S. have on your likelihood to visit California for a holiday?



Based on what you know or have seen, read or heard, how would you compare California to the rest of the U.S. as a whole?



Among the respondents not likely to travel to California, top reasons include



Source: ORC International