It’s Working
From the CEO

Now More Than Ever

Over 25 years of progress, partnership and the unwavering pursuit of our biggest dreams has passed to reach this moment in time.

FY18/19 was a momentous year for many reasons. California tourism enjoyed a ninth straight year of success, setting records in travel spending, jobs and tax revenue.

The Golden State remains the No. 1 destination in the nation, fueled by a strong global marketing program, inspiring travelers around the world to “Dream Big.”

In the pages that follow, read about successes from a combination of specific brand advertising campaigns and an “Always On” global marketing approach to reach prospective visitors across 14 global markets.

Despite a year of record-setting success, the industry has been faced with challenges. In the wake of our state’s most devastating fire season, Visit California launched a multilayered “#CALove” campaign, including a celebrity-driven public service announcement, to tell the world that California is resilient and remains strong.

California’s resilience has been tested through decades of complicated crisis and economic scenarios, and the industry must be prepared for future challenges.

**Conceived, funded and lead by the tourism industry, Visit California has proved we are stronger when united.**

Now more than ever, we must stand united in the face of challenge and move into a sustainable future together.

Thank you for your partnership.

I invite you to explore and share the interactive experience at industry.VisitCalifornia.com/YearInReview.

Dream Big!

CAROLINE BETETA
President & CEO

About Visit California

Visit California is a 501(c)6 nonprofit organization with a mission to develop and maintain industry guided marketing programs—in partnership with the state’s travel industry—that keep California top of mind as a premier travel destination.

Get Involved

Learn about partnership opportunities, events, and find a number of free resources including research, trainings and media on Visit California’s industry-focused website, industry.VisitCalifornia.com.
Visit California strives to ensure the industry’s investment is executed for the purpose it was given: to do what the industry cannot do itself. A vast majority of Visit California’s resources go directly into marketing California.

**Visit California’s Budget**

- **88%** goes directly into marketing programs.
- **12%** is used for operations.

**National Average of State Tourism Boards**

- **79%** for programs.
- **21%** for operations.

**Fiscally Responsible**

Visit California continues its streak of perfect unqualified audits for its 21st consecutive year.

**FY18/19 Tourism Industry Investment**

The investment of each industry segment is leveraged by the collective contribution of all other segments in order to benefit the entire tourism industry.

- **52%** Car Rental
- **38%** Accommodations
- **4%** Retail
- **3%** Restaurant
- **2%** Attractions
- **1%** Transportation
- **0.2%** State Funding

Source: Dean Runyan Associates, Inc.
Driven by the state’s wide variety of tourism leaders, flourishing businesses and forward-thinking destinations, the state has experienced **nine years of year-over-year growth**.

**Economic Impacts**

**Travel Matters**

<table>
<thead>
<tr>
<th>What California tourism does</th>
<th>How that benefits California</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employs 1.2 million workers</td>
<td>For every $1 million in visitor spend = 15 jobs are created</td>
</tr>
<tr>
<td>Provides $11.8 billion state and local tax revenue</td>
<td>Without tourism spending, each California household would have to pay an additional <strong>$890 in taxes annually</strong></td>
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</tbody>
</table>

Resurface 17,000 miles of road + Hire 149,000 new teachers for one year

Source: Dean Runyan Associates, Inc.
**Traveler Spending by Industry Segment**

- **Food & Beverage**: $37.4B
- **Accommodations**: $28.9B
- **In-State Travel**: $26B
- **Arts, Entertainment & Recreation**: $18.2B
- **Shopping**: $17.3B

*In-state travel includes local transportation and gas and visitor air transportation.*

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**California Shines Bright**

The Golden State remains a top destination drawing 11.5% of all U.S. tourism in 2018. California continues to out-index the U.S in all lodging metrics.

**OCCUPANCY**

- California: 75%
- United States: 61%

**ADR**

- California: $168
- United States: $118

**RevPAR**

- California: $127
- United States: $67

Source: Smith Travel Research 2018
Foundational Marketing

An ‘Always On’ Approach

Visit California’s strong foundation of “Always on” global marketing activity across 14 markets in paid, owned, earned media and travel trade channels delivered strong results in FY18/19, driving demand for California to a record high.

**Paid**

Advertising reached consumers through broadcast, online TV and digital channels featuring new TV spots.

**Owned**

Original content and unique series introduced travelers to California while the new California Road Trip Republic and Tasteblazers platforms launched highlighting the open road possibilities and food exploration to be had.

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**8.6 BILLION**
IMPRESSIONS

**$47.4 MILLION**
INVESTMENT

**203.8 MILLION**
HOUSEHOLDS REACHED (BROADCAST)

**78**
NEW ORIGINAL DREAM365TV CONTENT PIECES

**3.9 MILLION**
SOCIAL MEDIA ENGAGEMENTS

**26.6 MILLION**
UNIQUE VISITORS TO VISIT CALIFORNIA GLOBAL WEBSITES

**1.6 MILLION**
CALIFORNIA WELCOME CENTER VISITORS
Earned Media
Global media efforts complemented consumer marketing campaigns such as Dream Drive and Gold Rush Rally while partnerships with key media and influencers kept California top of mind for international audiences.

Travel Trade
Travel trade co-ops and partnerships introduced the trade audience to the excitement California has to offer while first-of-their-kind initiatives such as IPW’s return to California and a CEO mission to the Middle East laid the foundation for successful partnerships in the new fiscal year.

$241.6 MILLION
MEDIA VALUE

179.5 MILLION
IMPRESSIONS

9.2 BILLION
IMPRESSIONS

5,500
MEETINGS

7,000
PLACEMENTS

53
CO-OPS

771
MEDIA AND INFLUENCERS HOSTED

243
TRAVEL TRADE HOSTED

31,000
AGENT TRAININGS
Global Marketing

Golden State Goes Global

Visit California's marketing campaigns are crafted to share the “Dream Big” ethos of the Golden State, inspiring a wide array of target audiences with varied interests.

Global Brand

New Brand Spots
Show Off California

Visit California is always driving desire for the Golden State through exciting marketing spots that show off everything California has to offer. A new global spot, “Spoiled,” aired in six countries. For the first time, six-second adaptations were created for online and mobile audiences.

Return on Advertising Spend

Visit California’s paid advertising generated an incremental spend of $13.95 billion, resulting in $893 million of incremental tax revenue. This is spending and tax revenue that would not have happened without Visit California’s paid marketing efforts.

Source: Strategic Marketing and Research Insights LLC (SMARI)
**Family**

*Kidifornia*

Through a new TV spot, “Parents Love It,” consumer activations, media events and influencer partnerships Visit California continued to emphasize California as the destination for family travel.

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**Super Affluent**

*Targeting High-Spending Visitors*

Trade shows, including Visit California’s own Connections California Luxury Forum, paired with original content series, new international inroads with the Middle East and powerful trade partnerships showed off the Golden State’s unique style of laid-back luxury.

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**Culinary**

*Serving Up California*

Crafted to encourage discovery of California’s adventurous and immersive edible experiences, Visit California launched the new Tasteblazers platform. Covering popular video series, statewide initiatives and the new Michelin guide of California, this platform establishes the Golden State as the destination for culinary connoisseurs.
**Leveraging Star Power**

Throughout FY18/19, Visit California worked with stars and celebrities across paid, owned, earned media and trade channels to deliver a global message that California is the ultimate dream destination and welcoming to all visitors.
Visit California inspires travelers to experience the Golden State through dynamic and engaging marketing programs in **13 international markets** in addition to the U.S. International travelers are vital to the state’s tourism industry by outspending and outstaying domestic travelers. In FY18/19 Visit California continued exploring the luxury-focused Gulf Cooperation Council region of the Middle East with the first CEO Mission to the region.

**Welcoming the World**

**Canada**
- 1.7 MILLION
- $2.4 BILLION

**Mexico (by air)**
- 597,000
- $677 MILLION

**Brazil**
- 208,000
- $338 MILLION

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Source: Tourism Economics; CIC Research; Dean Runyan; OTTI; U.S. Dept. of Commerce; Bureau of Economic Analysis
18.1 MILLION INTERNATIONAL TRIPS
370,000 AVERAGE WEEKLY SEATS
$28.3 BILLION INTERNATIONAL VISITOR SPENDING

France
480,000
$875 MILLION

United Kingdom
751,000
$1.1 BILLION

Germany
416,000
$777 MILLION

Scandinavia
279,000
$554 MILLION

Japan
562,000
$1.2 BILLION

South Korea
517,000
$1.2 BILLION

China
1.6 MILLION
$3.5 BILLION

India
353,000
$847 MILLION

Italy
199,000
$356 MILLION

Australia
614,000
$952 MILLION
California saw an unprecedented fire season in 2018, but together with industry partners, Visit California took active steps to assess the needs of affected destinations. Once ready, an “open for business” message was relayed to travelers around the world to support recovery efforts.

Many resources were devoted to amplifying that California was open for business including spotlighting affected regions in new commercial spots, “California Dream Eater” episodes and leveraging media and influencer relationships to garner global coverage.

**Crisis Response**

**Inspiring Recovery with #CALove**

- 180 MEDIA PLACEMENTS
- 51,000 SOCIAL IMPRESSIONS
- $1.2 MILLION INVESTMENT
- $853,000 DONATED MEDIA
The Power of Love PSA

Building on the outpouring of support, Visit California worked quickly to create the “Share Your California Love” campaign led by “The Power of Love,” celebrity-driven 60- and 30-second public service announcements asking viewers to donate to the Red Cross, volunteer in rebuilding efforts and visit to help affected areas get back on their feet.
# Commissioners (As of August 2019)

Visit California’s marketing programs are funded by 21,000 assessed businesses and guided by a Board of Directors representing every tourism segment and region.

<table>
<thead>
<tr>
<th>Chair</th>
<th>VICE CHAIR OF MARKETING</th>
<th>VICE CHAIR OF OPERATIONS</th>
<th>CHIEF FISCAL OFFICER</th>
</tr>
</thead>
<tbody>
<tr>
<td>James Bermingham</td>
<td>Gene Zanger</td>
<td>Paula Beck</td>
<td>Dan Gordon</td>
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<tr>
<td>Executive VP, Operations</td>
<td>Partner</td>
<td>VP of Global Accounts — West</td>
<td>CEO</td>
</tr>
<tr>
<td>Montage International</td>
<td>Casa De Fruta Parkway, LLC</td>
<td>Avis Budget Group, Inc.</td>
<td>Gordon Biersch</td>
</tr>
</tbody>
</table>

## Commissioners

- **Gary Buffo**  
  President  
  Pure Luxury Transportation

- **Jim Burba**  
  President  
  Burba Hotel Network

- **Anthony Cannella**  
  Principal  
  NorthStar Engineering Group, Inc.

- **Jason Clarke**  
  General Manager/VP  
  Enterprise Rent-A-Car

- **Russ Cox**  
  Executive VP of Operations  
  Interstate Hotels & Resorts

- **Joe D’Alessandro**  
  President & CEO  
  San Francisco Travel

- **Josh D’Amaro**  
  President  
  Disneyland Resorts

- **Michael Dunne**  
  Area VP of Operations, CA.  
  Hilton Worldwide

- **Kevin Fat**  
  COO  
  Fat Family Restaurant Group

- **Robert Gleason**  
  President & CEO  
  Evans Hotels

- **Dan Harvey**  
  Division VP  
  The Hertz Corporation

- **Karen Irwin**  
  President & COO  
  Universal Studios

- **John Kelliher**  
  Founder  
  Grapeline Wine Tours

- **Brian King**  
  Global Officer — Digital, Distribution, Revenue Management & Global Sales  
  Marriott Business Services

- **Terry MacRae**  
  CEO  
  Hornblower Cruises & Events

- **Noreen Martin**  
  Chairman  
  Martin Resorts, Inc.

- **Jordan Meisner**  
  Senior Vice President — Field Operations  
  Hyatt Hotels & Resorts

- **Lenny Mendonca**  
  Director  
  Governor’s Office of Business & Economic Development

- **Tom Klein**  
  Owner  
  Rodney Strong Wine Estates

- **Sima Patel**  
  CEO  
  Ridgemont Hospitality

- **Peter Ronchetti**  
  President & General Manager  
  LEGOLAND California Resort

- **Benjamin Webster**  
  Office Managing Shareholder  
  Littler Mendelson P.C.

- **Ernest Wooden Jr.**  
  President & CEO  
  Los Angeles Tourism & Convention Board

- **Bobbie Singh-Allen**  
  Executive VP & COO  
  California Lodging Industry Association

- **Mark Sullivan**  
  Managing Director of North America  
  DFS

- **Paul Tormey**  
  Regional VP & General Manager California Region  
  AccorHotels