



Visit California

Wine Country Hospitality  
Symposium

March 27, 2012

visit  
California

# Nichole Farley

Industry Relations Representative, Northern California:  
VISIT CALIFORNIA

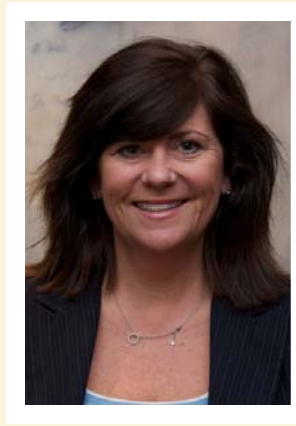


# Visit California leadership

- Governor of California
- Secretary of the Business, Transportation and Housing Agency and CTTC Chair



**Ed Fuller**  
Vice Chair of Marketing



**Kathy Turner**  
Vice Chair of Operations



**Rusty Gregory**  
Chief Fiscal Officer

# Working Together...

## *Present Board Members:*

### **Joe D'Alessandro**

San Francisco Travel Association  
(appointed to Bay Area region)

### **Tom Klein**

Rodney Strong Wine Estates  
(appointed to North Coast region)

### **Jot Condie**

California Restaurant Association  
(elected)

# Visit california leadership

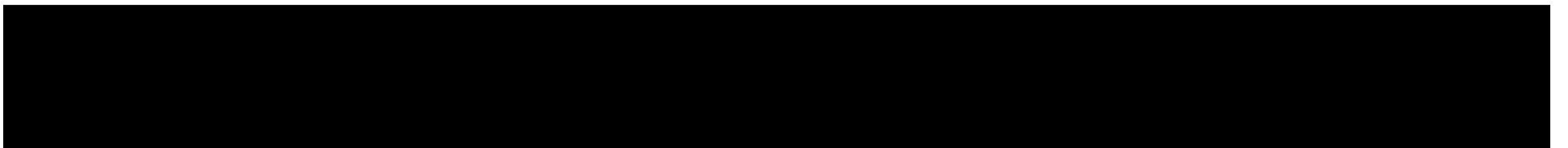
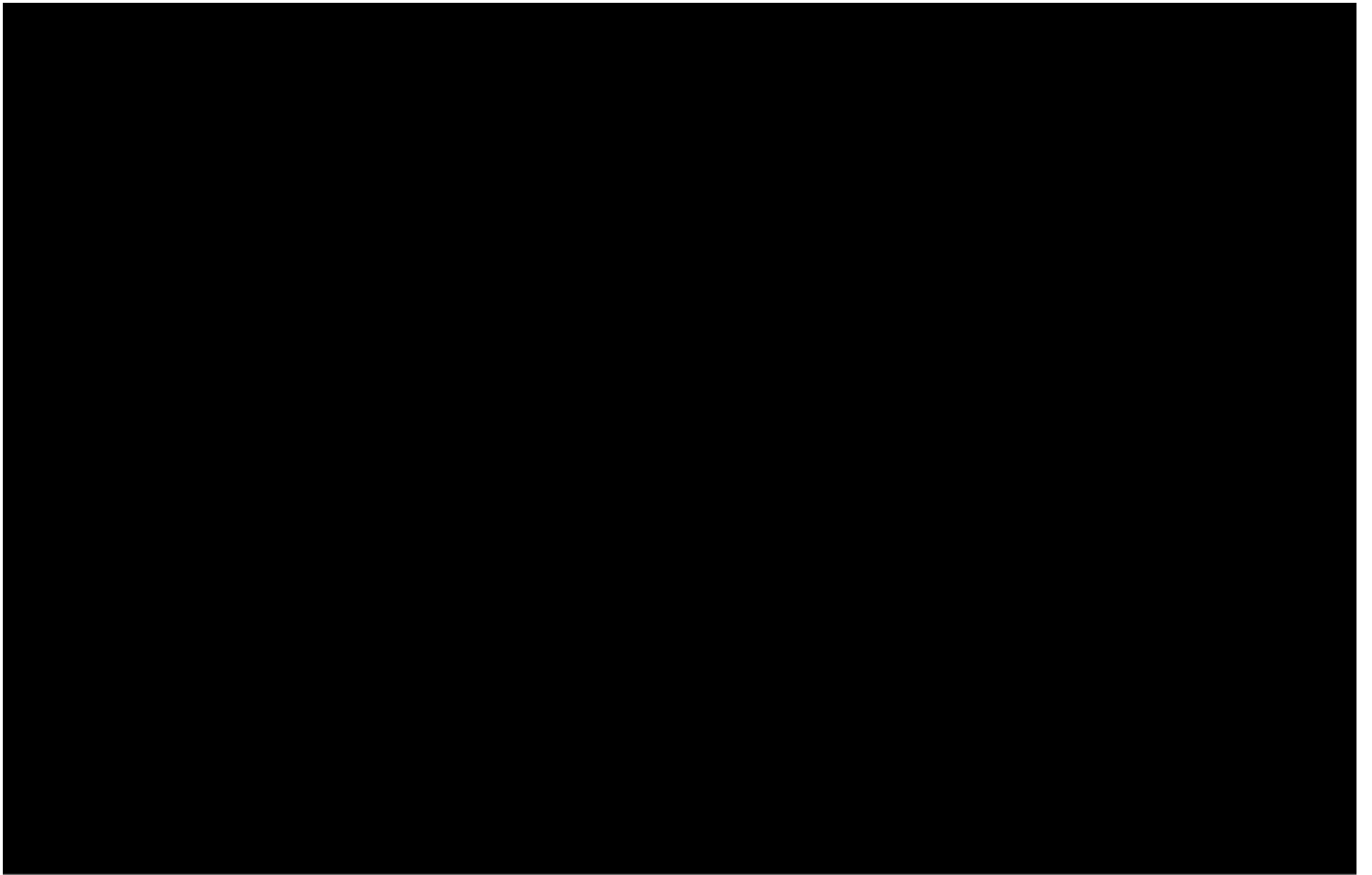


Caroline Beteta  
President & CEO

# boosting tourism and travel

Orlando, Jan. 19, 2012

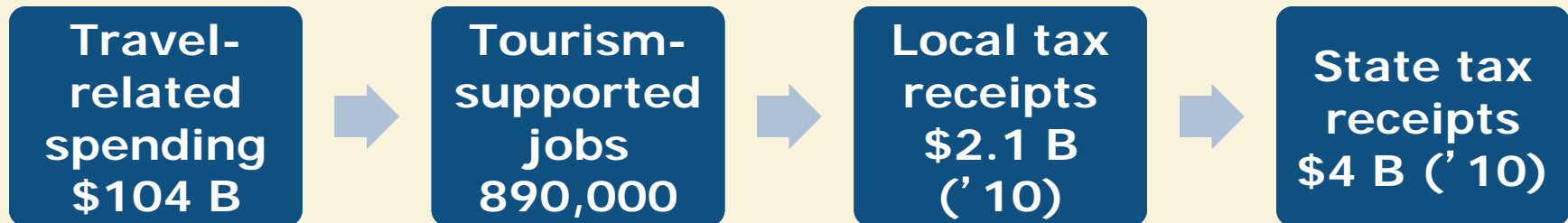




# \$104 billion

- California travel-related spending rose **10%** last year to an estimated \$104 billion.
- Visitor spending broke the **\$100 billion** mark for the first time despite continuing economic headwinds.

# Visitor Spending in California

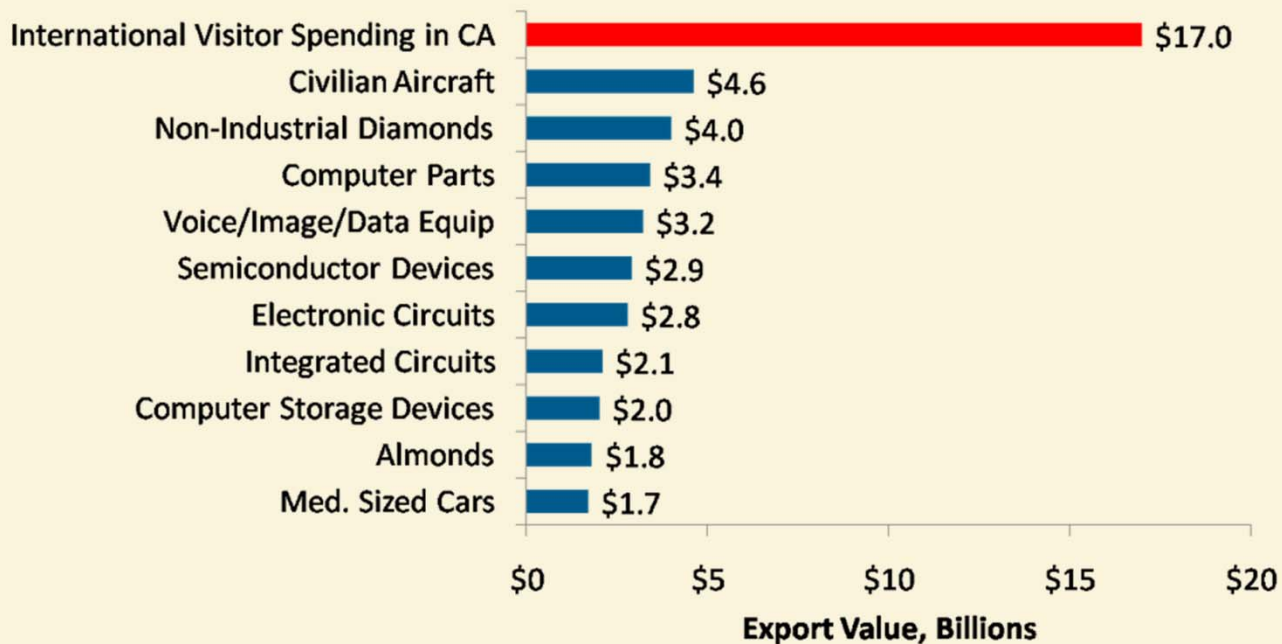


# Tourism Means Jobs

- Every 1% increase in visitor spending = **8,730** new jobs
- Leisure & Hospitality added **27,000** jobs between December 2010 and December 2011
  - *This 1.8% increase outpaced the state's overall farm increase of 1.7%*

# Tourism as an Export

Top California Exports 2010



- International tourism spending is greater than that of CA's top 4 export categories combined.

# 2012 Forecast

## Domestic

2012

Total Visits	+1.6%
Leisure	+1.5%
Business	+2.1%
Spend	\$88.3 B

## International

2012

Total Visits	+4.7%
Overseas	+5.5%
Mexico	+4.2%
Canada	+3.9%
Spend	\$21.7 B

Source: *Tourism Economics*

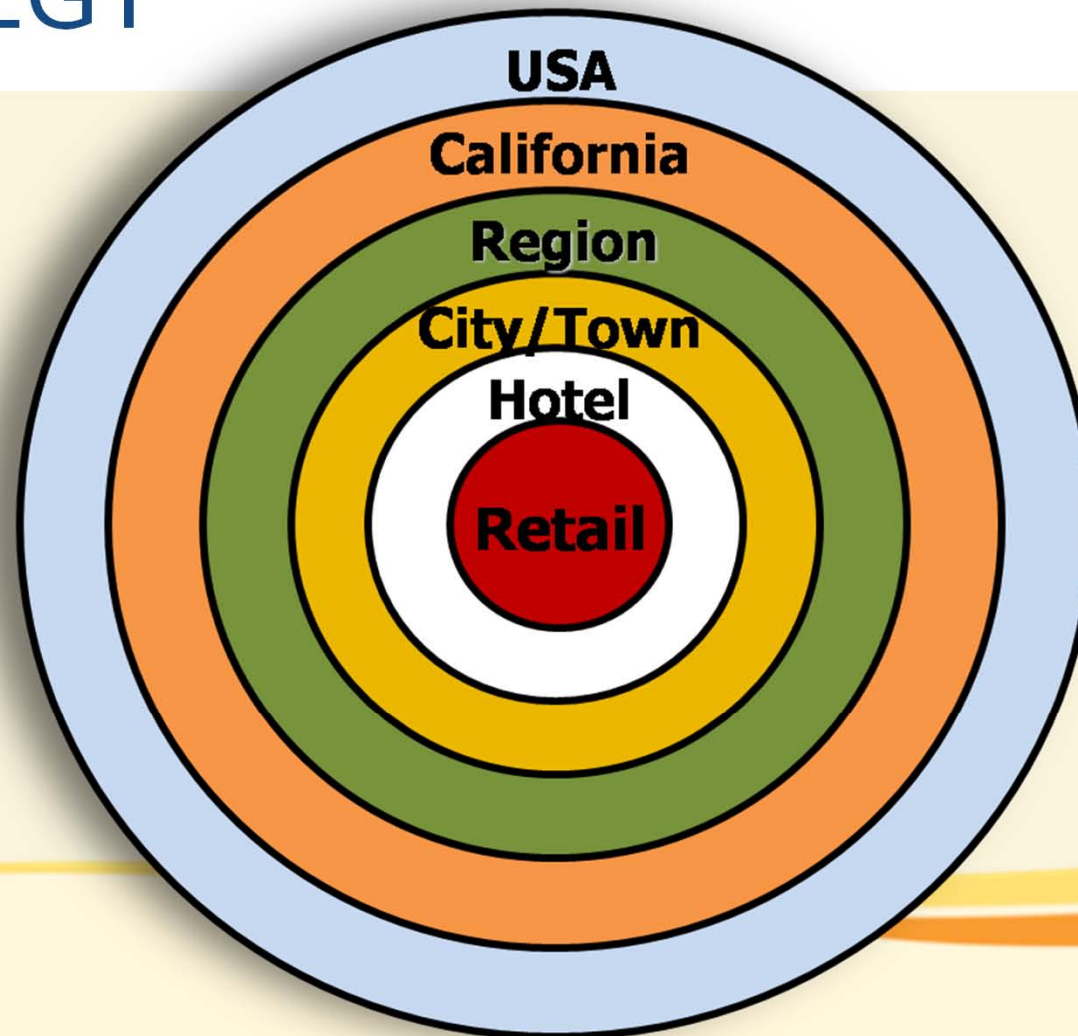


OUR MISSION:

Create desire for the  
California experience

visit  
California

# DESTINATION MARKETING STRATEGY



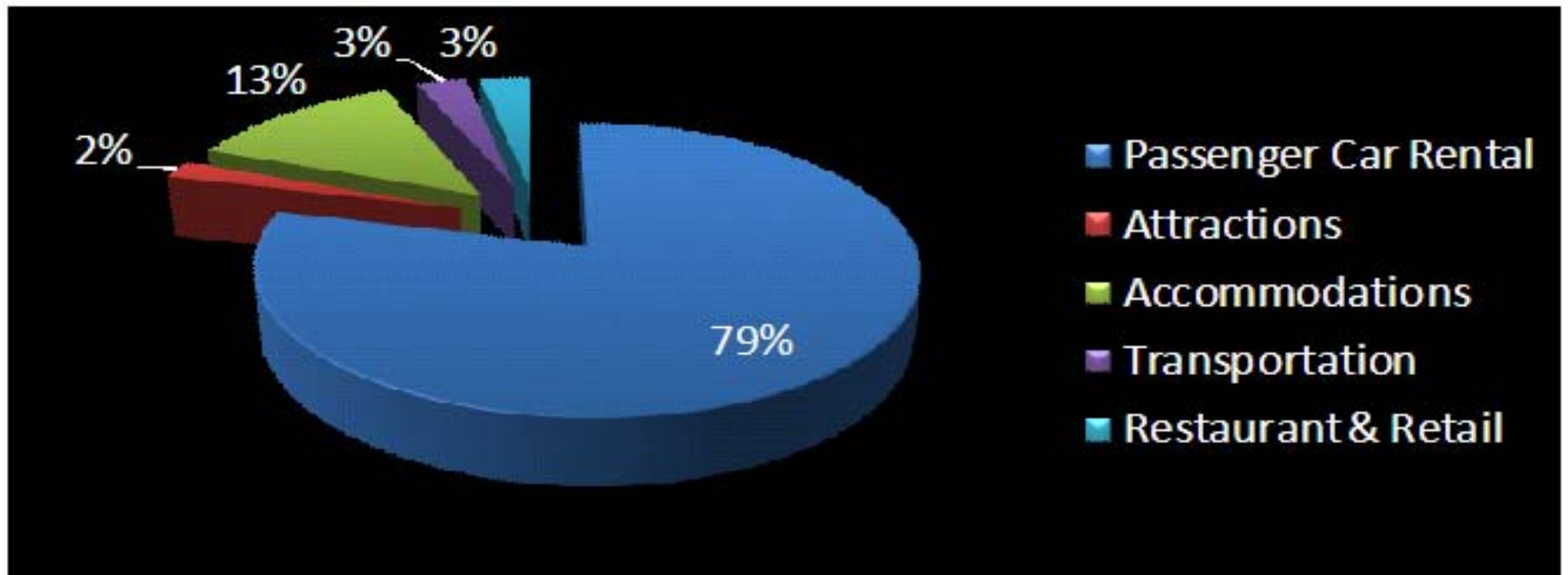
Bull's-eye =  
Retail  
Restaurant  
Attractions



How do we  
accomplish this?

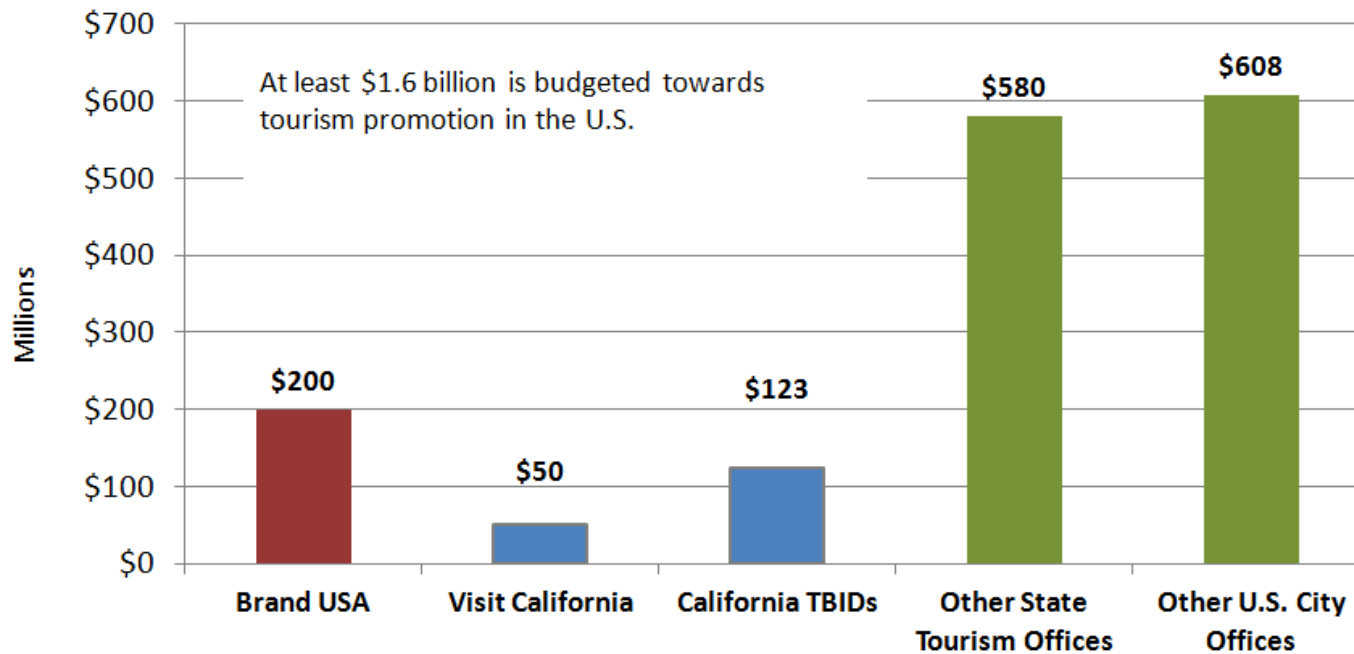
visit  
California

# California tourism investment



# Tourism Promotion Spending

## Tourism Promotion Spending





BRAND  
ENRICHMENT  
PLAN  
3 A/26/11

# 5-Year Strategic Marketing Plan

2011 2012 2013 2014 2015 2016

Fiscal Years 11/12 to 15/16

california™  
FIND YOURSELF HERE

# Strategic MARKETING PLAN

OBJECTIVE 1

Platform

OBJECTIVE 2

Brand

OBJECTIVE 3

Engagement

OBJECTIVE 4

International

# Preserve & Innovate

**INNOVATE**

**BRAND  
VITALITY**

Deploy efforts that enable the California brand to transcend the travel category

**PRESERVE**

**BRAND BUILDING**  
Creating inspiration  
and desire for CA

Continue to build the California brand to competitively position the state



# Global PlatformS

visit  
California



# California Food & Wine

# Family Attractions



# Music & Entertainment

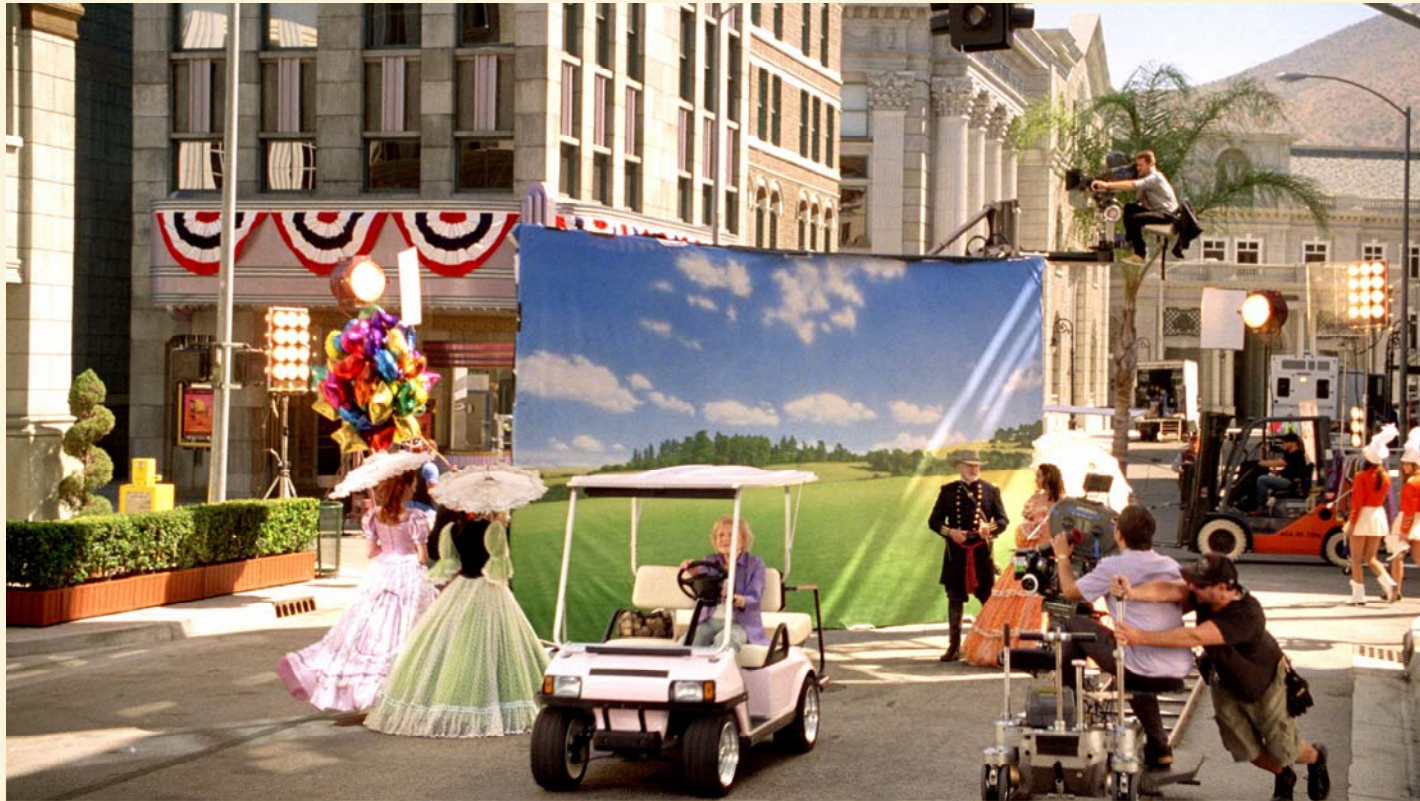


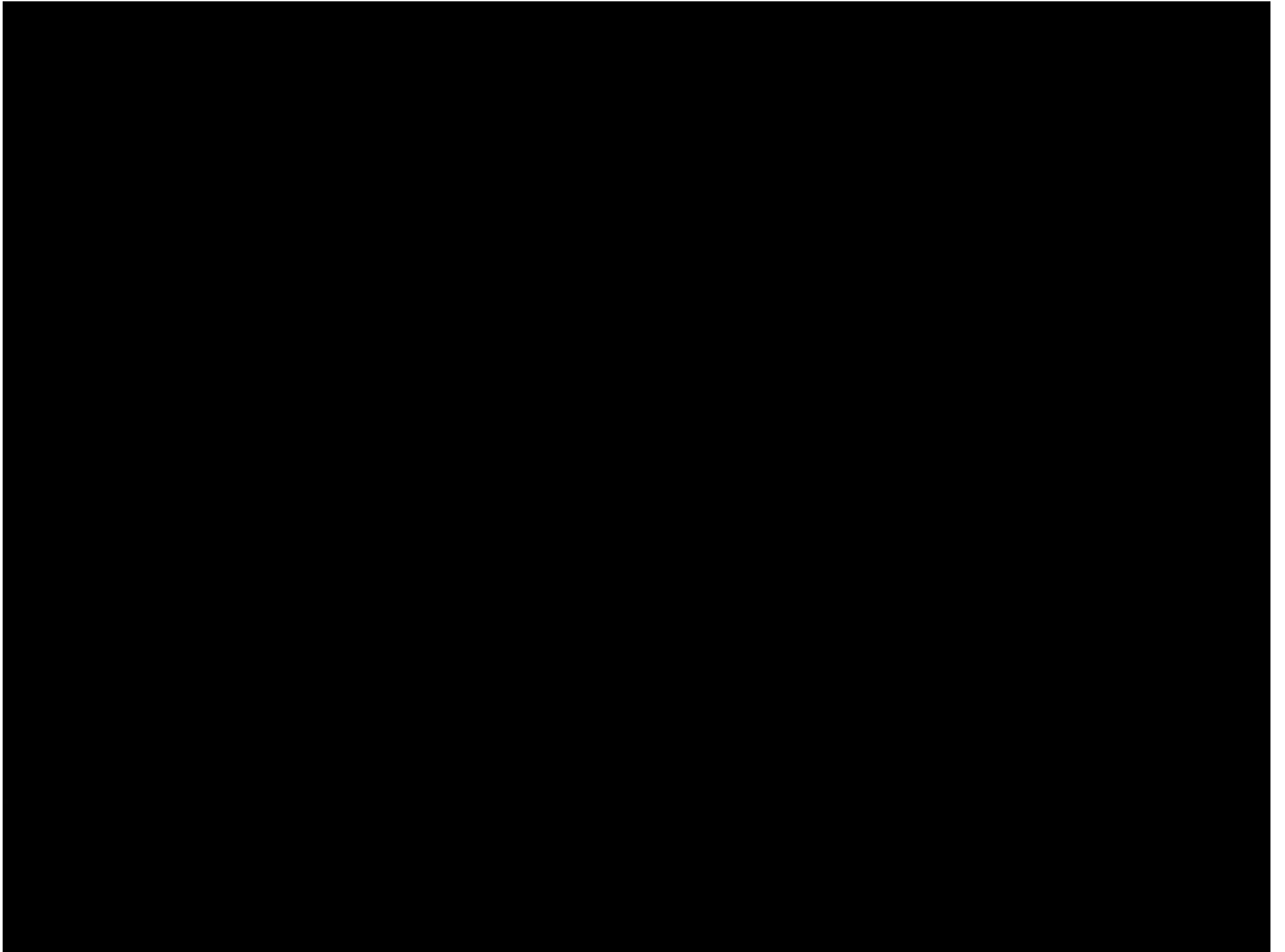


# Global Brand Approach

visit  
California

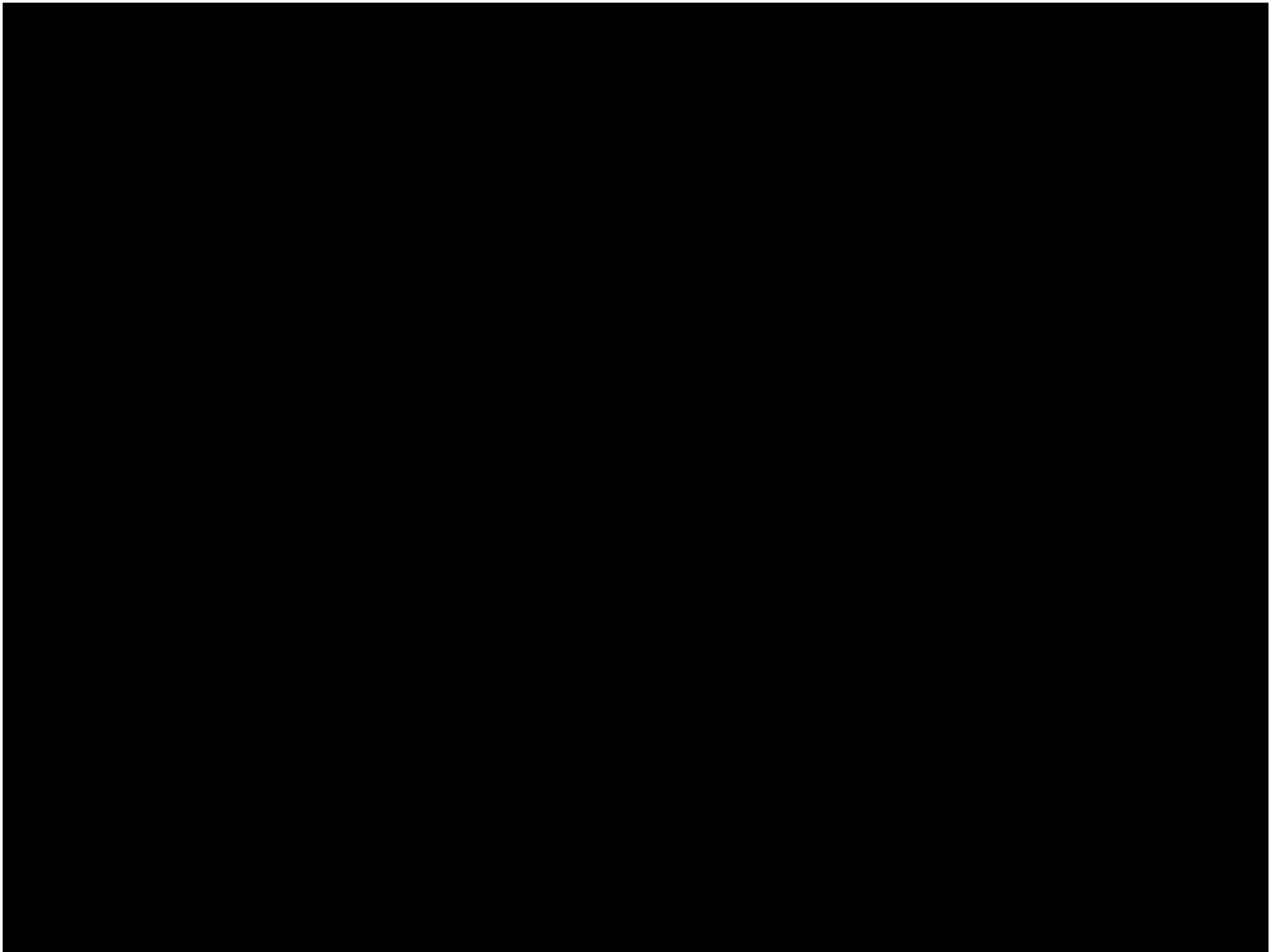
# Video: Misconceptions





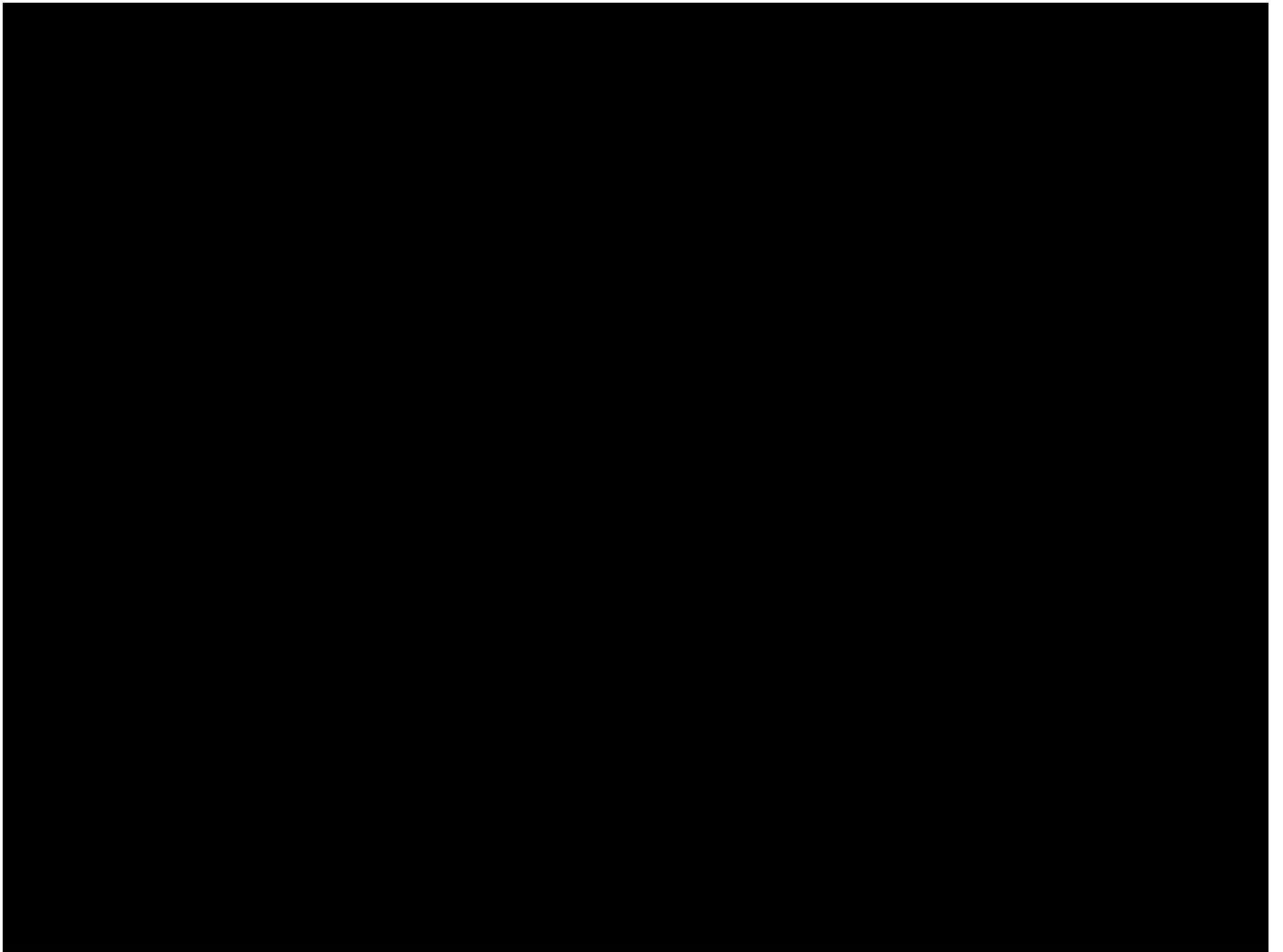
# Video: The Good Life





# Video: out there



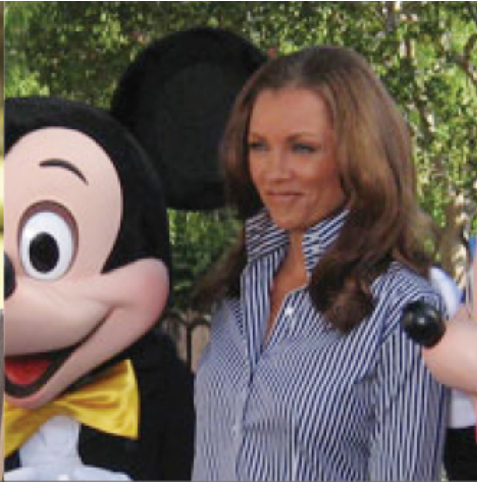


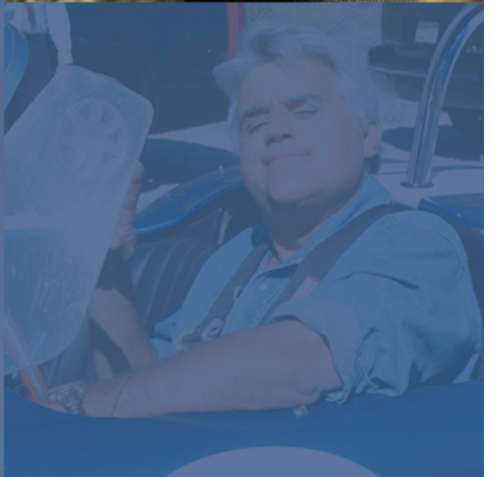
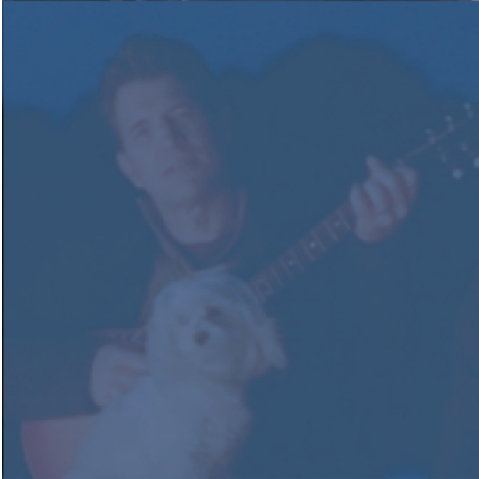
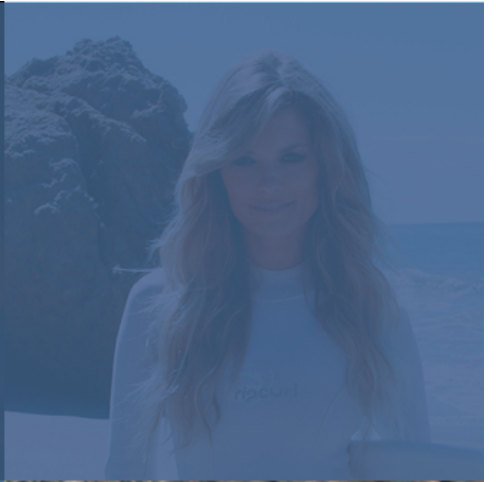
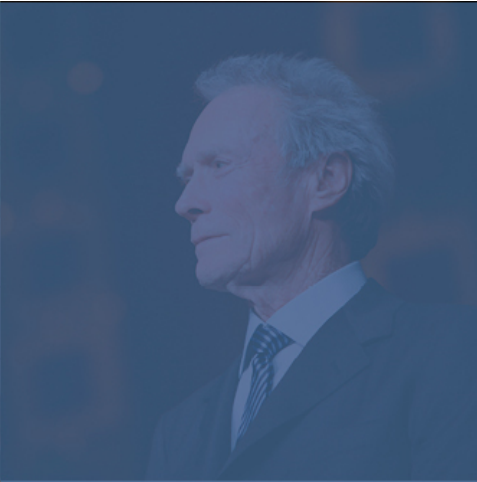
# Tangible results

## Global Brand Advertising: 2010

- **REVENUE: \$5.1 billion**
- **AWARENESS: 46.2 million households**
- **TRIPS: 3.7 million**
- **ROI: \$236**

SMARI







## ULTIMATE ROAD TRIP

[View All Behind the Scenes](#)



- Rob Lowe Videos:
- 1. "California Dreamland"
  - "Ultimate Road Trip"
  - "Favorite Eats"
  - "Outdoor Adventure"
  - "Family Attractions"
  - "California Snow"
  - "Go-to Getaway"
  - "California Bucket List"
  - "Recent Adventures"

**CLICK TO WATCH ANOTHER ROB LOWE VIDEO**



*Discover Rob Lowe's California*

More Articles





Sunny salutations from Calif  
Frank Almeida. Botanist and  
one of the most am  
Come explore Fra

A bold "was  
rules and S

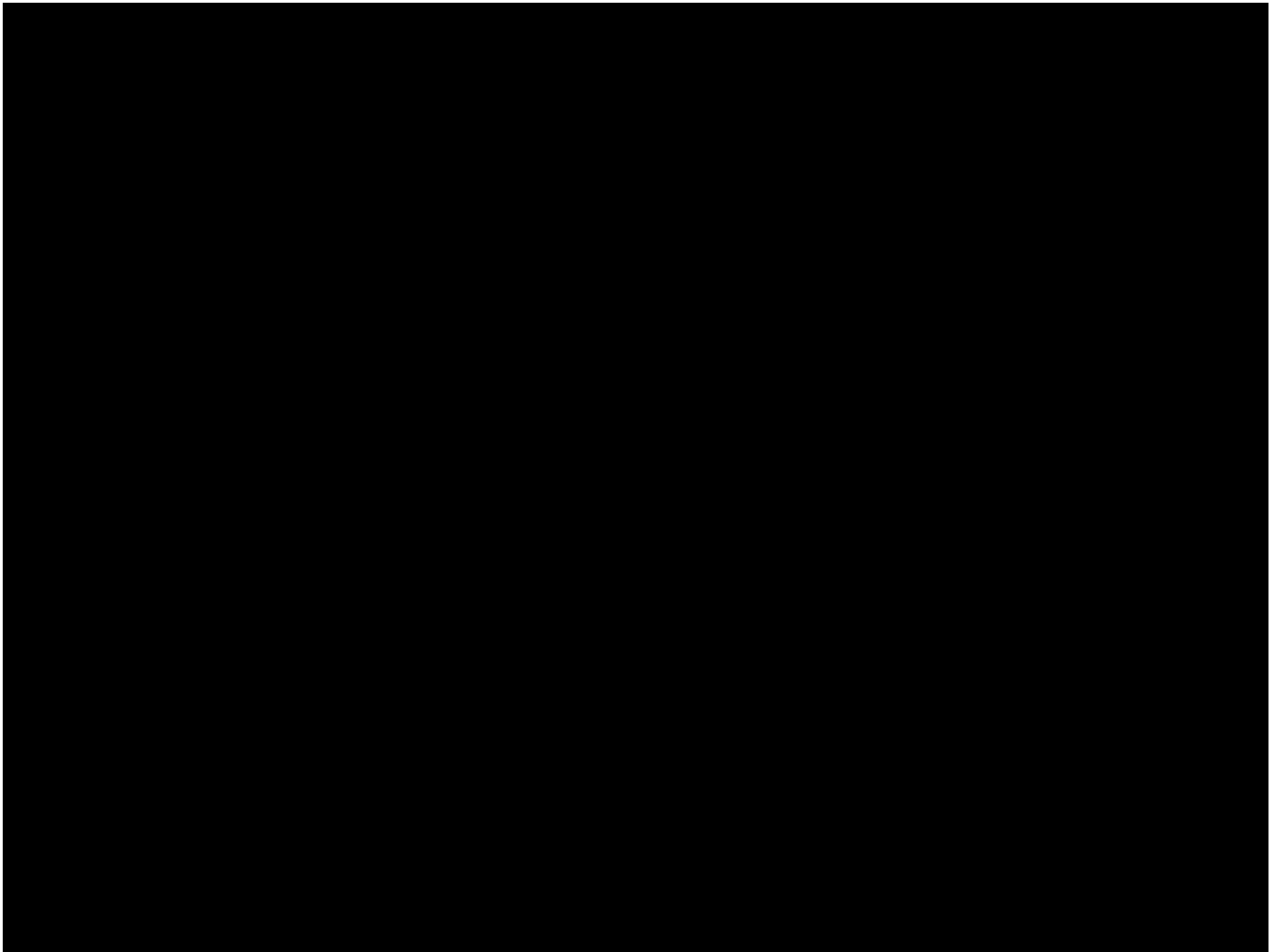
A very warm  
and the man who  
beaches of C

A giant fello from the land of big reds and bold winthers, like Randy Lewis. A land called California, where racecar drivers can find second lives as winemakers. And you can find all the culinary adventure you crave. Start planning your tasting tour at [visitcalifornia.com](http://visitcalifornia.com)

**Randy Lewis**  
- BARON OF THE BARRELS -

**california**  
FIND YOURSELF HERE





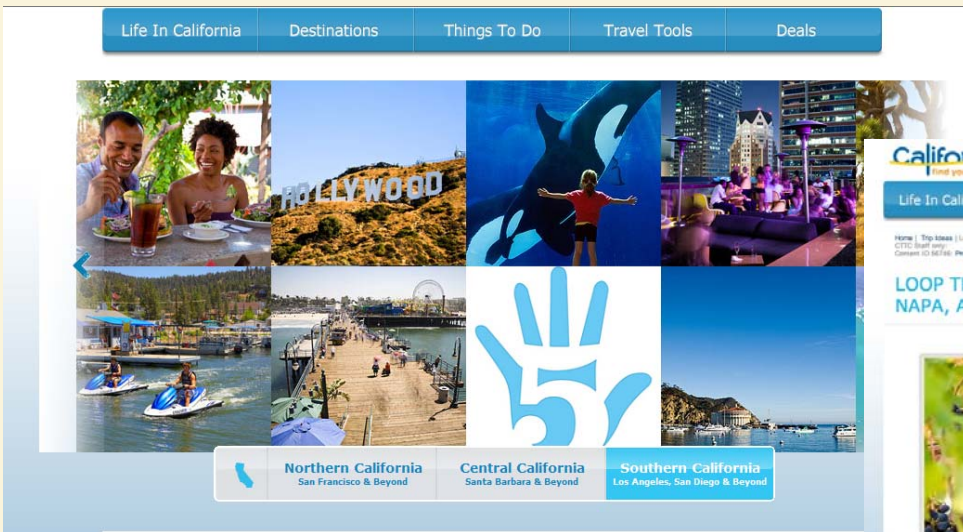


Global  
Engagement

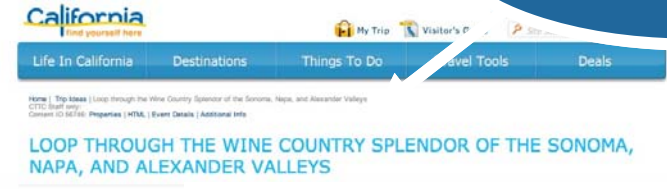
visit  
California



# Visitcalifornia.com



Featured Activities



Visitor's Guide

View, download or order your free official state guide and travel planner

Popular Travel Tools

- Maps
- Trip Ideas
- Visitor's Guide
- Welcome Centers

Search Our Directory

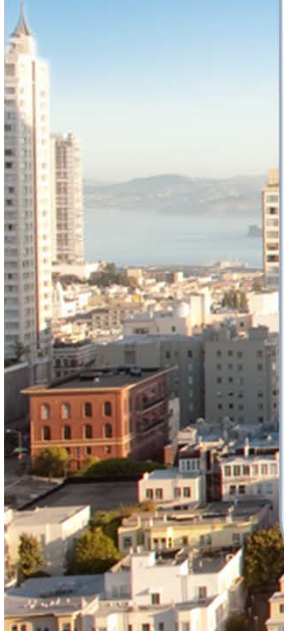
All Regions  OR

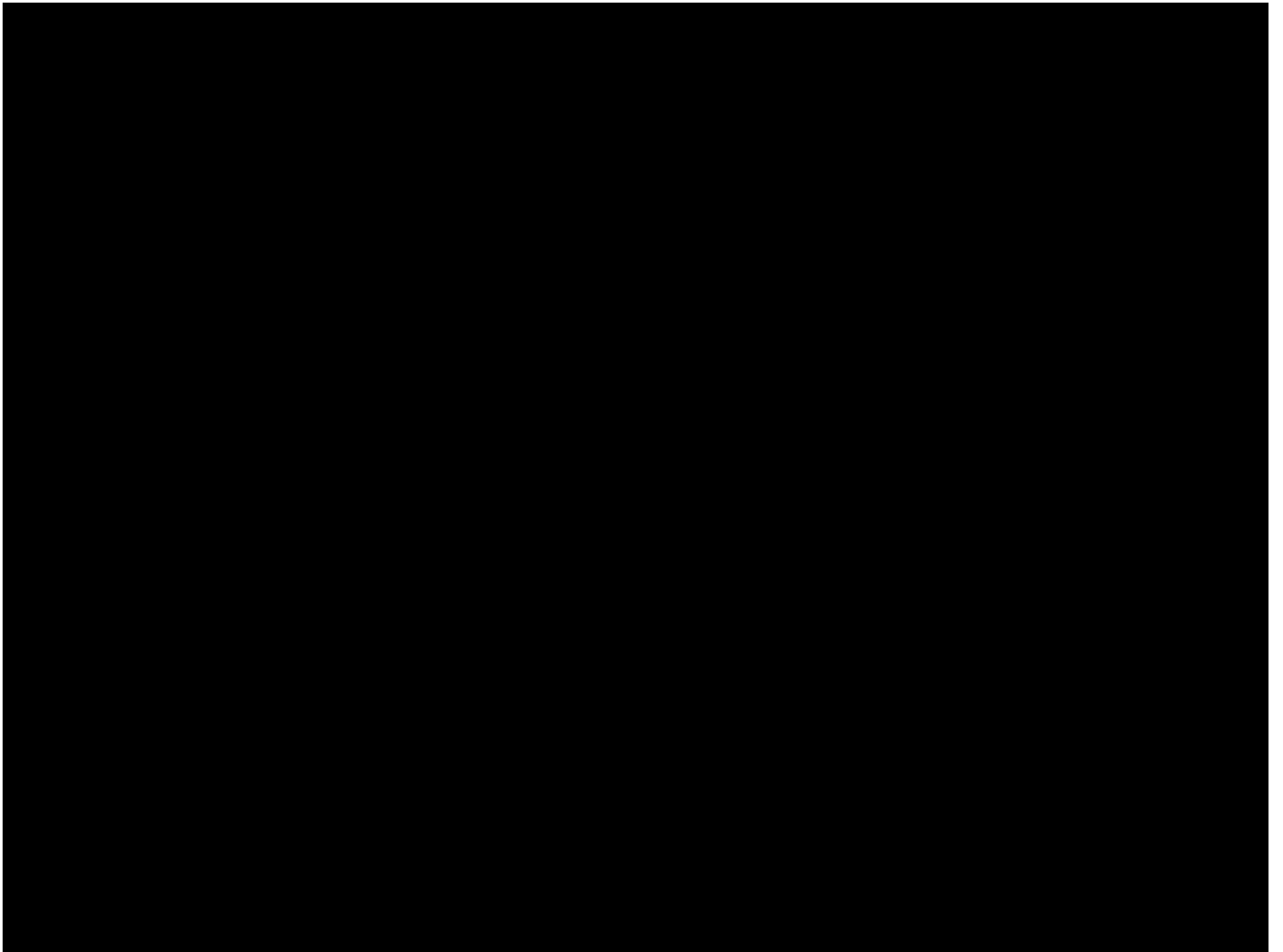
city or zip

Fresh Design & Added Content



# Mobile: Dream, Plan, Go





# CWC Locations

- Alpine
- Anderson
- Arcata
- Auburn
- Barstow
- Buena Park
- El Dorado Hills
- Mammoth Lakes
- Merced
- Oceanside
- Oxnard
- Pismo Beach
- Salinas
- San Francisco
- San Bernardino
- San Mateo
- Santa Rosa
- Truckee
- Tulare
- Yucca Valley



# Publications

INSIDE 32 free maps | Road trips | Food & wine | Must sees

FROM THE EDITORS AT **Sunset**

# California

YOUR ULTIMATE VACATION GUIDE 2012

**3-DAY GETAWAYS**

- San Francisco
- Los Angeles
- San Diego

**ROB LOWE**  
**Why I Live Here**

**\* THEME PARK DAZZLERS**

**MOUNTAIN MAGIC**  
**YOSEMITE MAMMOTH LAKES SEQUOIA**

**California**  
I find myself here  
visitcalifornia.com

Lush gardens like this one in Mendocino yield fresh, organic ingredients for local chefs.

## GROWN

Just-picked strawberries, follow a food and wine expert to corners of the Golden State

**SAN DIEGO COUNTY & INLAND EMPIRE REGIONS**  
**San Diego & Riverside Counties**  
An abundance of sunshine and a mild Mediterranean climate give the San Diego area a natural advantage for growing a wide array of crops, including avocados and macadamia nuts (outside Hawaii, the region is the biggest grower in the country). Walk the docks in San Diego to watch American Tuna fishermen unloading their pole-caught cargoes of albacore from the only sustainable tuna fishery in the world. In Carlsbad, a local aquafarm raises over a million pounds per year of indigenous shellfish including oysters, mussels, and abalone. And to wash

**CENTRAL COAST REGION**  
**Monterey County**  
During the summer, ye farmers' market in or

WINE EDITOR: ROB LOWE

## ROAD TRIPS 2011 | GOLD COUNTRY

SPECIAL ADVERTISING FEATURE

### Go for the Gold

Take twisty country roads through the rumpled foothills of this historic region to find the latest boom—boutique wineries.



- SACRAMENTO** Enjoy an easy spin and learn local lore with Fast Eddie's Bike Tours, then enjoy the changing menu at Mulvaney's B&B at swanky Ella Dining Room and Bar. Or track down the Miniburger Truck for super-fresh and creative slider. INFO 916/442-7644
- COLOMA** (48mi/77km; 58mi) Raft down the S. Fork American on a wet-and-wild guided rafting trip. Hang out post-paddle at the Colort Club, a historic hotel-turned-saloon relax with classy fare at Cafe Mahja. INFO 530/333-1543

- PLACERVILLE** (9mi/14km; 16min). Walk colorful Main Street, watched over by the 1865 Bell Tower, once a citywide fire alarm. Enjoy Third Saturday Art Walks and tastings at nearby Boeger Winery. INFO 530/621-5885
- SHENANDOAH VALLEY** (26mi/42km; 34min). Visit family-run vineyards like Bray Vineyards (try the saucily named GrayZin Hussey Red) and Tuscan-elegant C.G. di Arnie Vineyard & Winery. INFO 209/267-9249
- PLYMOUTH** (4mi/6km; 4min). Pull over in this tiny town to relax at acclaimed wine bar/restaurant Taste. Head to Avador Flower Farm to see (and buy) 1,000 types of daylilies.



## ROAD TRIPS 2011 | CENTRAL COAST

SPECIAL ADVERTISING FEATURE

### Homegrown Goodness

Taste and sip your way from the rolling green fields of Steinbeck country to Santa Barbara's stately palms.

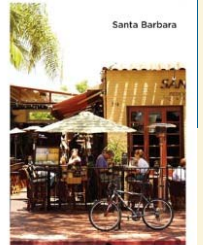


More ideas at visitcalifornia.com



- GILROY** Summer is peak season at this "Garlic Capital of the World," but celebrate the bulb year-round at Garlic World. Be tempted by bargains at Gilroy Premium Outlets. Let the kids romp at Gilroy Gardens theme park. INFO 408/842-6435
- WATSONVILLE** (21mi/34km; 26min). Pick your own fruit at Guzzich Ranch (May-Sept), grab lunch at the on-site deli, and picnic among the fruit trees. Be sure to buy a fresh pie too. INFO 831/722-1056

- SALINAS** (45mi/73km; 59min). Learn about a local literary giant at the National Steinbeck Center; displays include an agricultural collection, appropriate in a region nicknamed "America's Salad Bowl." Drive the lovely River Road Wine Trail. INFO 831/657-6400
- PASO ROBLES** (98mi/158km; 1hr 32min). Stop in at exceptional wineries and tasting rooms, then visit boutiques and cafes dotting the town plaza. Try Villa Creek Restaurant for fresh rustic fare highlighting sustainably farmed ingredients. INFO 805/238-0506
- SAN LUIS OBISPO** (29mi/46km; 31min). This town's 5-block farmers' market is legendary. Aim to visit on Thursday evenings for barbecued ribs, specialty booths, live entertainment, and 120 vendors. INFO 805/541-8000
- SANTA MARIA** (33mi/53km; 35min). Head downtown for traditional Santa Maria-style barbecued tri-tip steak and savory pinquito beans at Shaw's. Stop by berry stands for spectacular strawberries Apr-Jun. INFO 805/925-2403



visit the exquisite mission, and cruise the Urban Wine Route—11 tasting rooms scattered downtown. INFO 805/966-2222

- OJAI** (33mi/53km; 45min). Breakfast on Mexican-inspired eggs at Ojai Cafe Emporium, then hike the Pratt Trail to the top of Nordhoff Peak for Channel Islands views. INFO 805/646-8126

**Mark your calendar**

**SEPT 28-OCT 2 | PEBBLE BEACH FOOD & WINE**  
A foodie's ultimate fantasy, with celebrity chefs, top winemakers, and entertainment. Buy tickets ASAP—this event always sells out.  
INFO 831/734-0771

**Local resources**  
**CALIFORNIA WELCOME CENTERS™**  
333 First Cities Dr., Ste. 100  
805/773-7924  
**OSWEGO**  
1000 Town Center Dr., Ste. 135  
805/968-0771



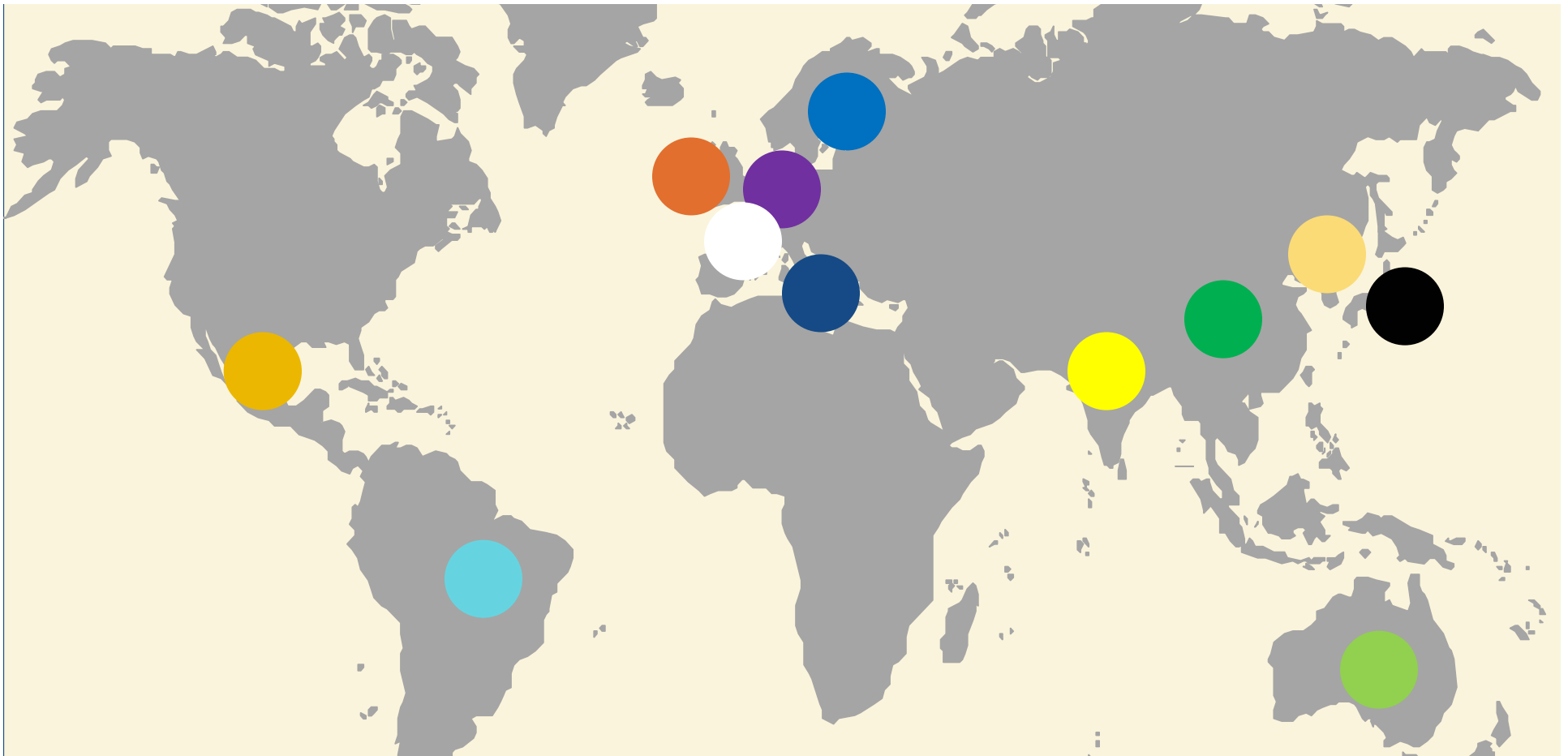
For more food and wine discoveries, go to visitcalifornia.com/RT11/central-coast



Global  
Programming

visit  
California

# 12 International offices



U.K., Australia, Japan, Germany, Mexico, S. Korea, China, India, Brazil, France, Italy, Scandinavia

# Travel Trade Missions



# Online Training Program

Launched and currently running in 11 international markets

- 9,202 total registered travel agents across all markets
- 2,921 travel agents have completed the online training course

The screenshot shows the homepage of the visit California Travel Trade Portal. The header includes the 'visit California' logo, navigation links for 'Sign In', 'Register', 'Order Guides & Maps', and 'United States', and a search bar. The main content area features a large banner for '5000+ free digital assets' with a 'Previous' and 'Next' navigation. Below this is a 'Sample Itinerary Ideas' section with three cards: 'California's Desert Itinerary', 'California Mountains Itinerary', and 'California Wine Country Itinerary'. On the right side, there is a 'Message from the CEO' section with a photo of Caroline Barreto, a 'California Tourism News and Events' section, a 'Sign In to Digital Assets' section, and a 'Become a California Expert' section.



# Domestic Programming

visit  
California

# Industry outreach



# AMGEN Tour of California



# Important Dates

April 21-25: Pow Wow, Los Angeles

May 5-13: National Travel & Tourism Week

May 11: Spring Board Meeting, Sonoma

May 11: AMGEN Rider Presentation Gala

May 13-20: AMGEN Tour of California

Aug. 11-19 & Aug. 27-Sept. 2: America's Cup World Series, San Francisco

# Marketing PROGRAM PLANNER

<http://industry.visitcalifornia.com>

- Visit California provides a great way for consumers to see your events, content & images!
- Submit editorial content and destination listings through the submission tool.

The screenshot displays the Visit California industry website interface. At the top, the logo for Visit California is visible, along with the text "Welcome to the California Tourism Industry Website" and "The marketing resource for industry professionals and press." A search bar is located in the top right corner. Below the header, there is a navigation menu with buttons for "Browse Programs", "Submit Content", "Find Research", "Calculate Assessment", "Travel Industry", "Press Room", "About Visit California", and "Publications". The main content area is divided into several sections: "What's New" with a recent article about the Visit California Year in Review; "Tools to Help With Your Marketing" featuring a "Submit Content" section with a "New Submission" button and an "Update Existing" button, and a "Marketing Program Planner" section with a "Start Planning" button and a search box for keywords; "Public Meeting Info" with a link to "notices.visitcalifornia.com"; "Upcoming" events including the World Travel Market VIP Film Premiere and various travel market events; "Featured Programs" with a link to submit RFPs; and "Visit California Leadership" with links to "Commissioners" and "Staff". An "Essentials" section on the left lists various documents like the Strategic Business Plan and Marketing Plan.

Thousands of editorials & events have made it onto the Web site!

# Industry.VisitCalifornia.com

The screenshot shows the homepage of the Visit California Industry website. At the top, the logo 'visit California' is displayed in white and yellow. Below it, a navigation bar contains buttons for 'Browse Programs', 'Submit Content', 'Find Research', 'Calculate Assessment', 'Travel Industry', 'Press Room', 'About Visit California', and 'Publications'. A search bar with a 'Go' button is located in the top right corner. The main content area is divided into several sections: 'What's New' with a news item about the 14th Annual Sacramento Museum Day; 'Tools to Help With Your Marketing' featuring a 'Submit Content' section with 'New Submission' and 'Update Existing' buttons; 'Marketing Program Planner' with a 'Start Planning' button and a search box; 'Public Meeting Info' with a scrollable list of meetings; 'Upcoming' with a scrollable list of events; 'Essentials' with a list of documents like 'Strategic Business Plan' and 'White Paper on CA Tourism'; and 'Featured Programs' with a scrollable list of programs. At the bottom, there is a 'Are You a Member of the Media?' section with 'Press Releases', 'Story Ideas', and 'What's New' buttons, and a 'Subscribe' button for email notifications.

- Research
- Information on global markets
- Trade show calendar
- Presentations

# Visit California Dashboard:

Trending Data

Lodging

Air Traffic & Overseas Arrivals

California Welcome Center Traffic

Domestic & International Travel

U.S. Work Force

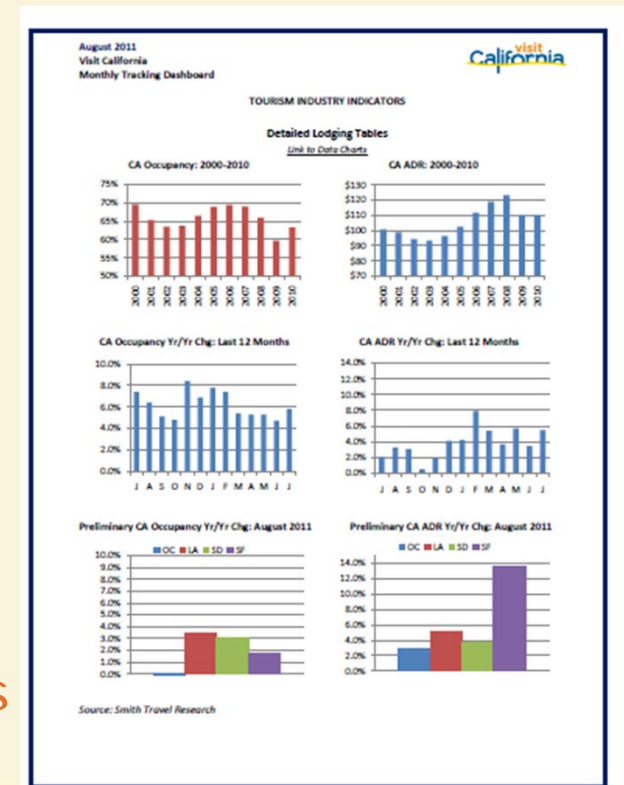
Consumer Confidence

Gas Prices

Exchange Rates

Flights & Seats on International Non-stops

Projected GDP Growth for Top Markets



# Find this presentation online!

<http://tourism.visitcalifornia.com>

The image shows a screenshot of the Visit California website. The main navigation bar includes tabs for 'Browse Programs', 'Submit Content', 'Find Research', 'Calculate Assessment', 'Travel Industry', 'Press Room', 'About Visit California', and 'Publications'. A blue oval with a white arrow points to the 'Travel Industry' tab, labeled 'Travel Industry Tab'. Below the navigation bar, there are several content sections. On the left, there is a 'What's New' section with a date of 12.02.2011 and a 'We've Changed Our Name!' announcement. In the center, there is a 'Submit Content' section. On the right, there is a 'Public Meeting Information' section. Below these, there is a 'Travel Industry' section with a list of links: 'CEO Blog', 'International Markets', 'Event Images & Video', 'Industry Links', 'Meeting Materials', 'Presentations', 'Golden State Sponsors', 'Past Visit California Events', and 'Sustainable Tourism Resources'. A blue oval with a white arrow points to the 'Presentations' link, labeled 'Presentations'. Below the 'Presentations' link, there is a 'New! Travel Trade Portal' section with a description: 'Visit California's latest marketing tool created for tour operators and retail agencies to better market and sell California to the world.' Below this, there are sections for 'International Markets', 'Event Images & Video', and 'Industry Links'. At the bottom, there is a 'Thank you' message.



Find Yourself  
Here

visit  
California





Visit california

Wine Country Hospitality Symposium  
March 27, 2012

visit  
California



# California Restaurant Month 2012



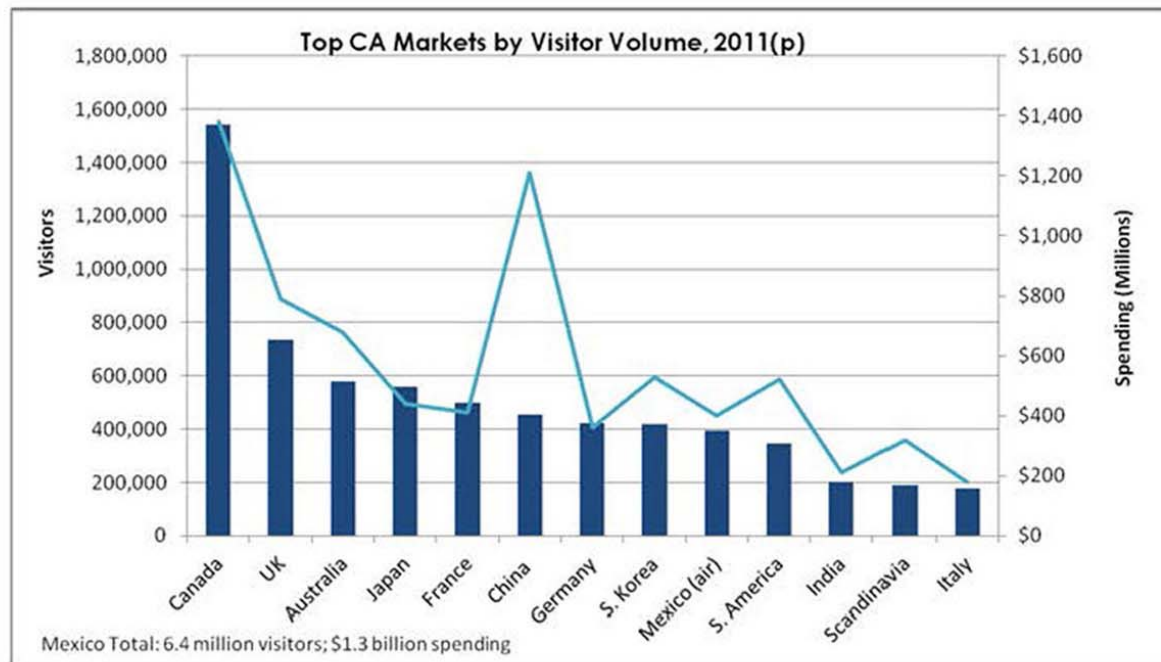
28 Destinations

35.8 Million Impressions

\$2.06 Million in Media Value



# visit california international markets



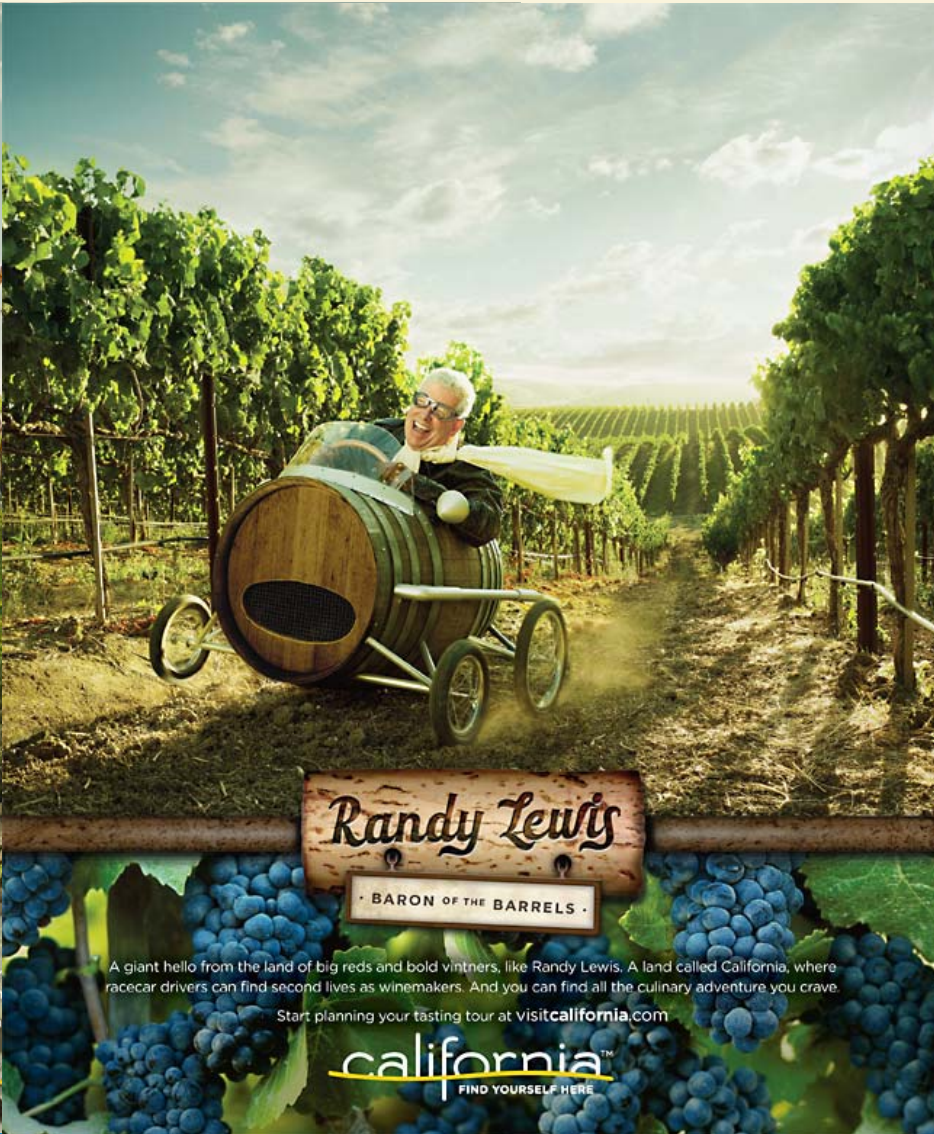
# Non-Resident Leisure Travel



**45 Million Person  
Trips**

**\$31 Billion  
Spending**

# Print Advertising



# Rural Program

## Reviews & Industry Interviews: Key Takeaways

- Generally maintain current regional structure
- Maintain grant program but add flexibility
- Refine presentation of rural assets in overall marketing
- Increased communication with staff & commissioners
- Stronger links between state and regional marketing efforts

# California Travel Impacts, 2011(p)

Total direct spending	\$104 B
Tourism-supported jobs	890,000
Local tax receipts	\$2.3 B
State tax receipts	\$4.4 B

Sources: Tourism Economics, Dean Runyan Associates

# Global View





**UPCOMING EVENTS**



WINTER