



Reimagining California's Brand for a New Era

Thursday, Sept. 21, 2023

Roles in the Travel Industry



PROMOTE

- Develop and maintain marketing programs
- Create a welcoming experience for U.S. and international tourists
- Keep California top-of-mind as a premier travel destination

ADVISE/EDUCATE

- Enhance the interests and investments of the California travel and tourism industry



**CALIFORNIA
TRAVEL
ASSOCIATION**
Tourism's United Voice

ADVOCATE

- Champion the importance of the California travel and tourism industry
- Foster relationships among industry stakeholders
- Provide meaningful education opportunities

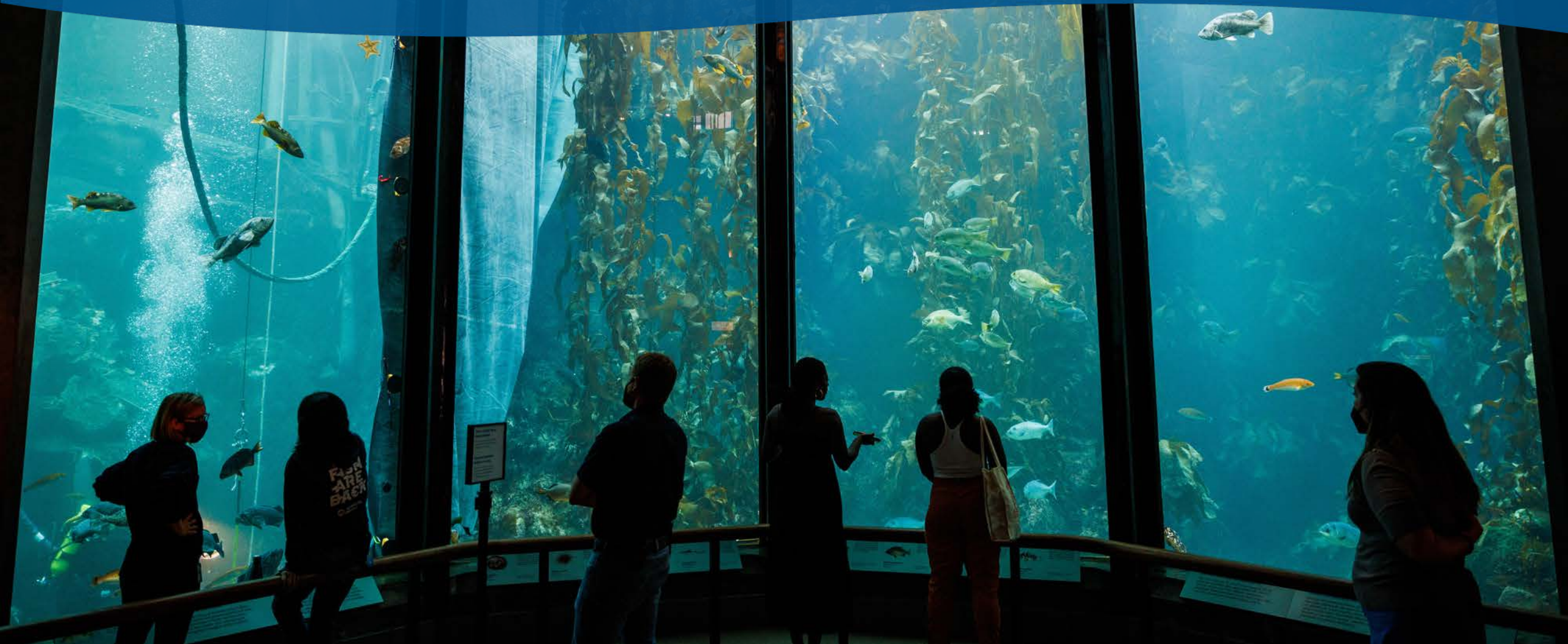
ACCELERATING CALIFORNIA'S RECOVERY



EVOLVING CALIFORNIA'S BRAND



CREATING A SUSTAINABLE FUTURE



The image features a scenic landscape with mountains and a sunset sky. A large teal semi-transparent rectangle is overlaid on the center of the image, containing the text "State of Tourism Back in the Game" in white. The foreground is filled with purple and yellow wildflowers.

State of Tourism Back in the Game



Tourism Related Spending

\$134.4B

Tourism Employment

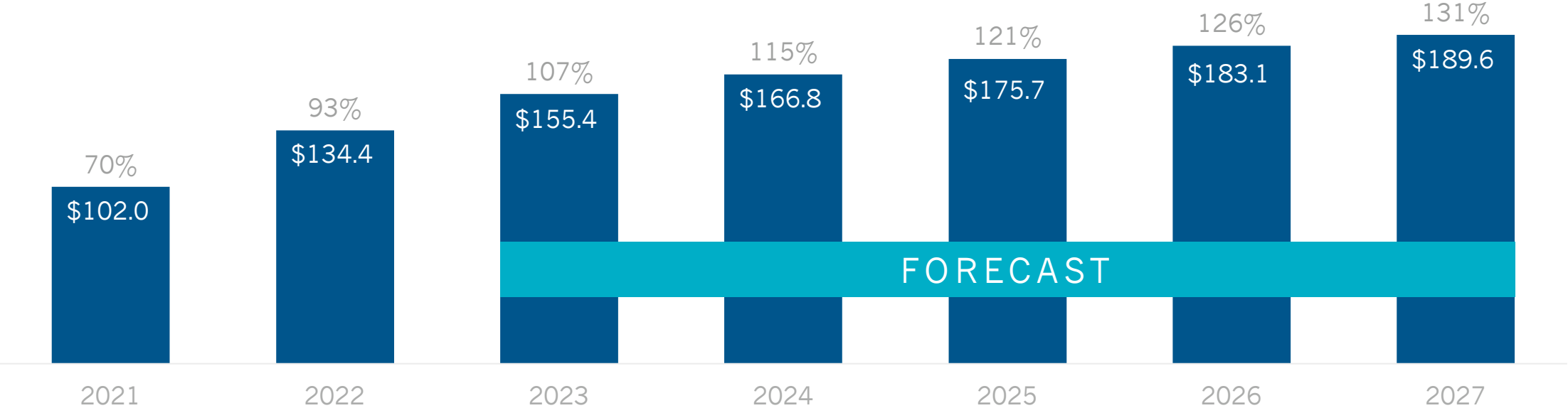
1.1M

State & Local Tax Revenue

\$11.9B

California Travel Spending Forecast

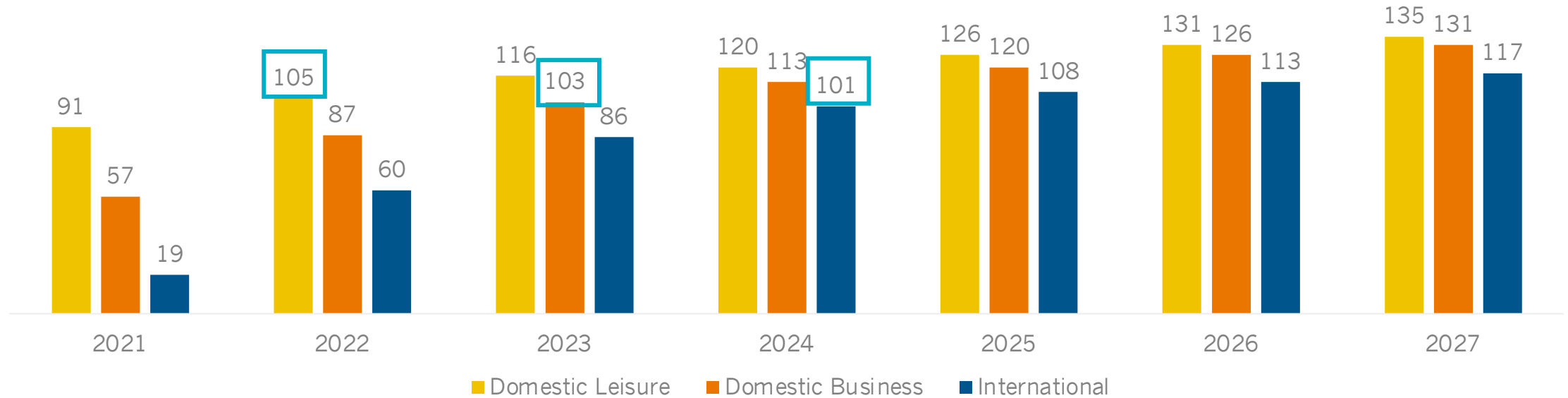
Total California Travel Spending
and Percent Value Relative to 2019



Source: Tourism Economics (May 2023)

Spending Forecast by Travel Segment

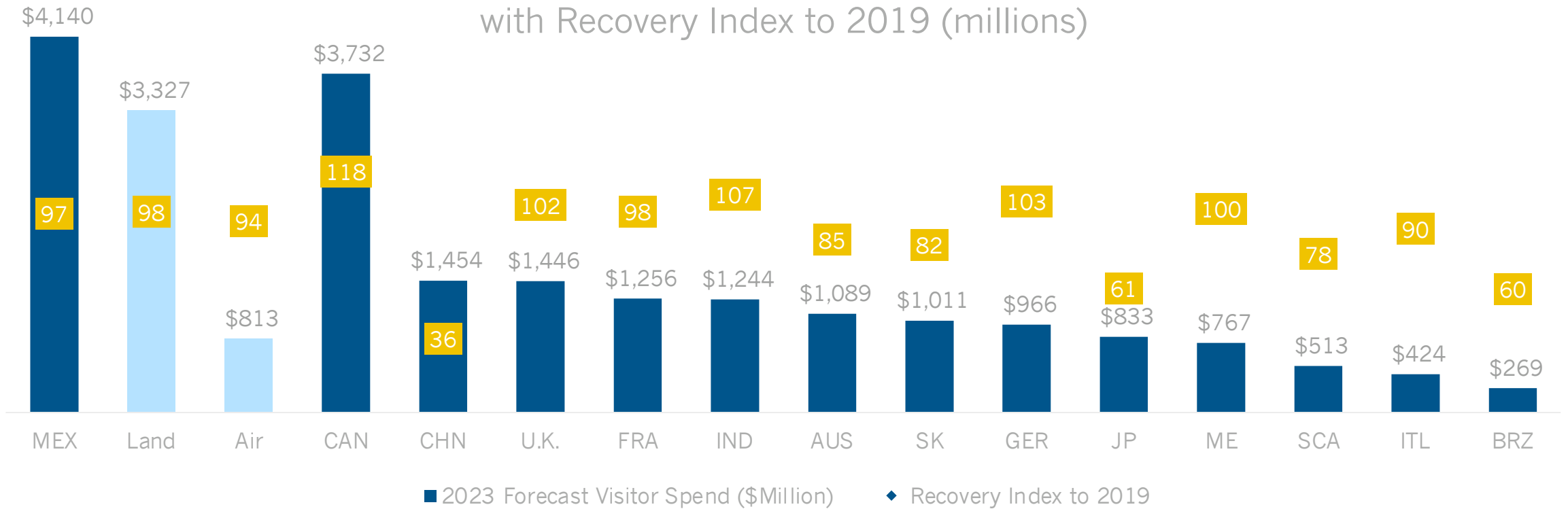
Forecast Comparison: Visitor Spend to California by Key Sectors
(2019=100)



Source: Tourism Economics (May 2023)

2023 Visitor Spending by Market

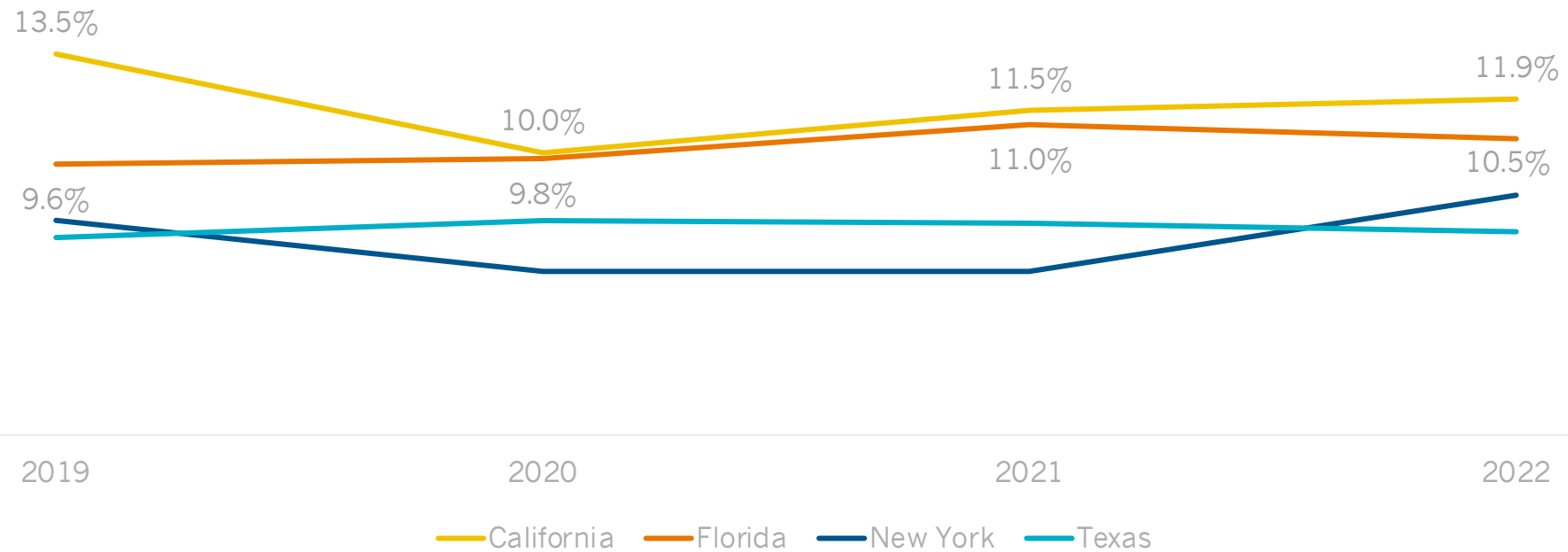
2023 Forecast Visitor Spend by Market with Recovery Index to 2019 (millions)



Source: Tourism Economics (May 2023)

California Recovering Market Share

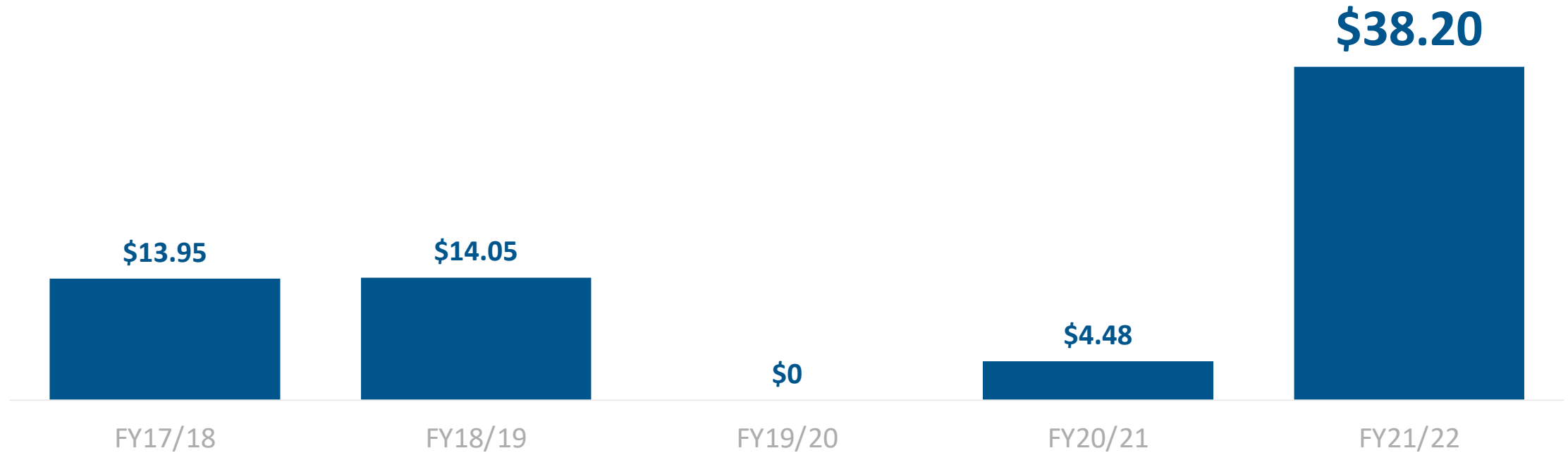
Share of U.S. Travel Spending



Source: Visit California/U.S. Travel Association/Dean Runyan Associates/Tourism Economics (May 2023)

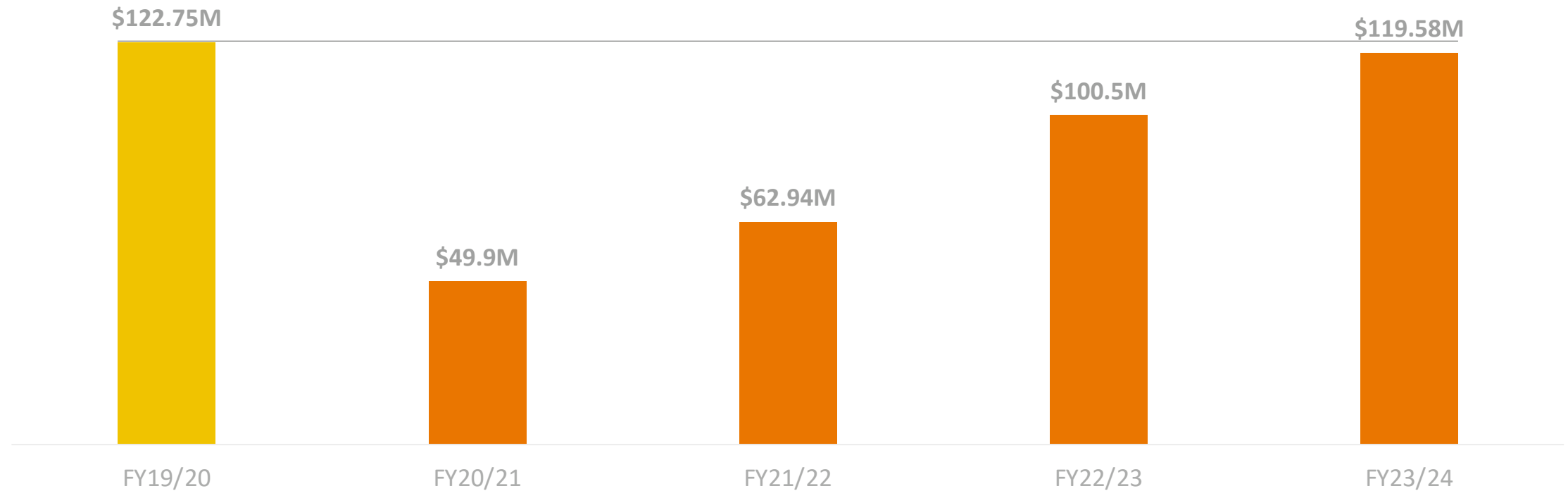
Record Setting ROI: \$38.2 billion incremental spend

Historical Ad-Influenced Visitor Spending (\$ Billions)



Source: SMARInsights

Tourism Industry Investment



Source: Visit California Budgeted Assessment Revenue





California's Brand: A Playful Transformation

visit
California

CA CULTURE + CA ABUNDANCE =

PLAYFUL/OPEN-MINDED (EMOTIONAL BENEFIT)

VAST/DIVERSE OFFERING (RATIONAL BENEFIT)

THE ULTIMATE PLAYGROUND

(BRAND POSITION)

California inspires travelers to pursue playfulness in their lives.

“A California vacation/holiday encourages me to express my individual form of play...”

Coming Soon:
**Ultimate Playground
New Creative**

- Los Angeles
- San Francisco
- San Diego
- Palm Springs
- Tulare County
- Temecula
- Del Norte County





**Inspiring Visitors
to Play Everyday**

FY23/24 Campaign Framework

BRAND CAMPAIGNS

Global
Leisure
Travel



'Ultimate Playground'



'Childhood Rules'



'California Road Trip Republic'

DYNAMIC FOUNDATIONAL CAMPAIGN



Leveraged Media Co-op – Search –
Social Display – Paid Content Distribution

Global
Business
Travel

PROFESSIONAL MEETING & EVENTS CAMPAIGN



'The Birthplace'

'Childhood Rules' Family Campaign





**ROAD TRIP
REPUBLIC™**

'The Birthplace'

NEW FOR FY24

IN THE BIRTHPLACE OF THE INTERNET
TECH-FORWARD MEETINGS ARE A NO-BRAINER.

SAN FRANCISCO, CA

Meetings in California are like no others. It's not just about the agenda, it's about the experience. The California Meetings & Events Association (CMEA) is the leading organization for the industry, providing resources, advocacy, and networking opportunities for all stakeholders. Visit www.californiametings.com for more information.

Meet What's Possible for your next meeting at www.californiametings.com.

IN THE BIRTHPLACE OF BREAKTHROUGHS
INNOVATIVE EVENTS ARE ALWAYS MAKING WAVES.

SAN DIEGO, CA

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IN THE BIRTHPLACE OF THE DESERT ESCAPE
UNUSUAL MEETINGS ENLARGE YOUR MEET AND GREET.

PALM SPRINGS, CA

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IN THE BIRTHPLACE OF FARM-TO-FORK ENTICING EVENTS
ARE ALWAYS ON THE MENU.

SACRAMENTO, CA

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IN THE BIRTHPLACE OF HOLLYWOOD
CREATIVITY IS ALWAYS IN THE SPOTLIGHT.

UNIVERSAL STUDIOS
LOS ANGELES, CA

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IN THE BIRTHPLACE OF WONDER
IMAGINATION AND HAPPINESS NEVER CEASE.

DISNEYLAND RESORT
ANAHEIM, CA

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IN THE BIRTHPLACE OF ZOOMING
THE MOST INNOVATIVE MEETINGS ARE STILL IRL.

SAN JOSE, CA

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IN THE BIRTHPLACE OF BIG DREAMS PERFECT WEATHER
PUTS ANYTHING ON THE TABLE.

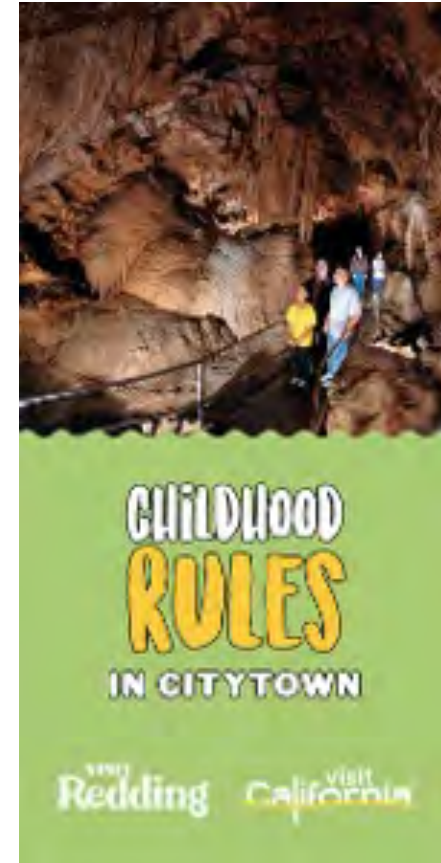
SANTA BARBARA, CA

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Global Leveraged Media Co-op

FY22 + FY23 Summary	
Industry Investment	\$5.33MM
VCA Media Match	\$1.98MM
VCA Production Value	\$232.5K
Media Discounts + Bonus Value	\$6.8MM
Total Program Value	\$14.4MM
Return on Industry Investment	2.7x





California Now News Network

3.2 Million Qualified Partner Referrals





Star-Studded Highlights

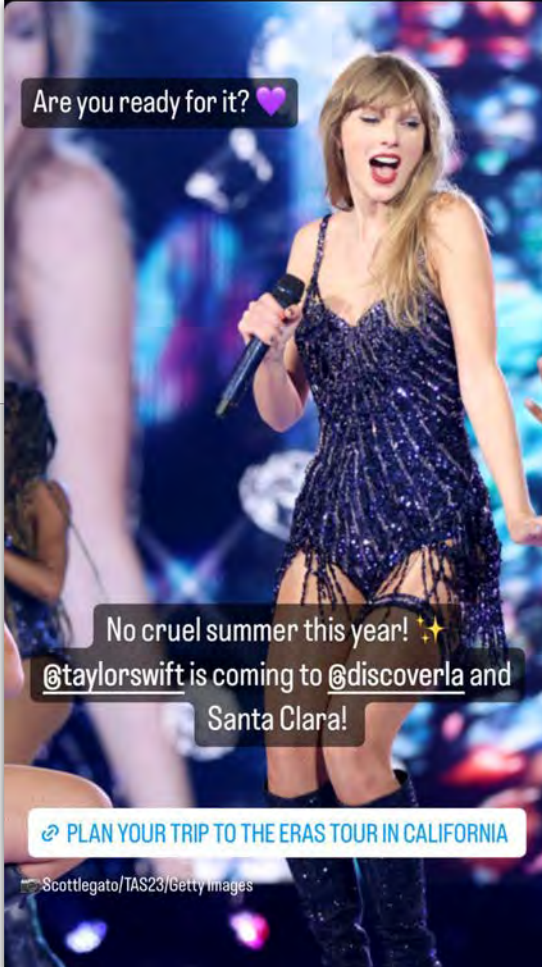




2023 Cover: Zooey Deschanel

Capitalizing on Fandom

Taylor Swift




Are you ready for it? 💜

No cruel summer this year! ✨
@taylorswift is coming to @discoverla and Santa Clara!

[PLAN YOUR TRIP TO THE ERAS TOUR IN CALIFORNIA](#)

Scottlegato/TAS23/Getty Images

Beyonce



@BEYONCE

Ring the alarm! Queen Bey is coming to Inglewood and Santa Clara! 🐝

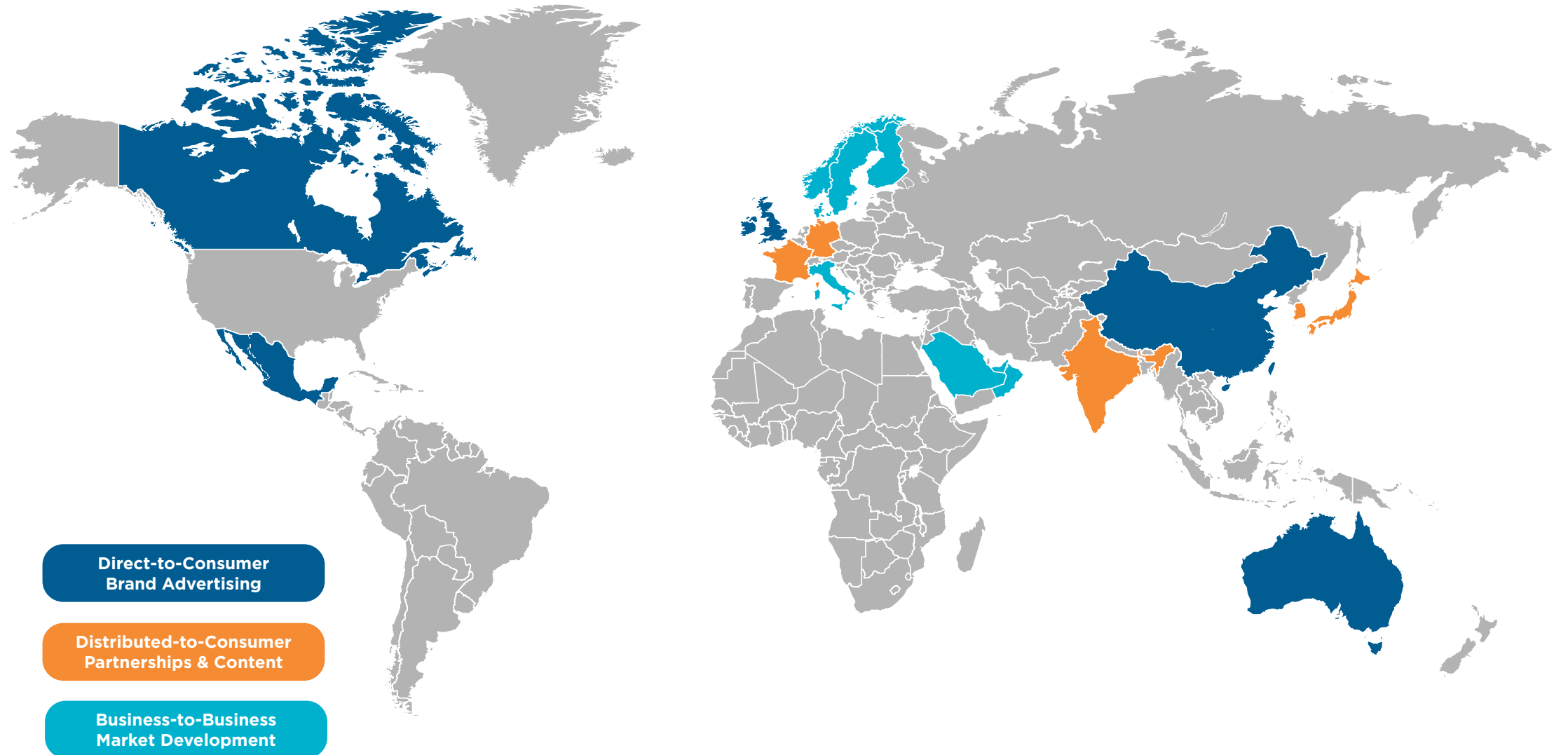
[MAKE THE MOST OF YOUR CONCERT EXPERIENCE](#)

Getty Images

A man and a woman are standing at an electric vehicle charging station. The woman, on the left, is wearing a white sleeveless top, olive green trousers, and a blue patterned tote bag. She is smiling and looking towards the man. The man, on the right, is wearing a blue button-down shirt, grey trousers, and brown shoes. He is holding a black suitcase and looking at the woman. They are standing next to an orange electric car. The background shows a wooden building and trees. The text "Global Rebound" is overlaid in the center of the image.

Global Rebound

Priority International Markets



First State to Return to China





Largest CEO Mission to Europe

Lt. Gov./GO-Biz Trade Mission to Japan

- 100-member trade delegation
- 13 tourism CEO delegates
- MOUs with JATA, H.I.S.



An aerial photograph of a coastal road winding through a green landscape. A teal semi-transparent rectangle is overlaid on the image, covering most of the frame. The text "On the Horizon" is centered in white on this rectangle. The background shows a road with a car, green hills, and a coastline with the ocean under a cloudy sky.

On the Horizon

Road to 2024 IPW in LA

- Facilitate return of Asia delegation
- Activate brand across all IPW touchpoints
- Showcase California hospitality at the California Plaza



Regional Tourism Plans

- Cover unique regional tourism challenges and opportunities
- Help tourism stakeholders, residents and civic partners prepare for the future in their destinations





California Destination Tourism Plans

- Some California destinations are developing or implementing local plans
- Regional Plans will align with existing work

Regional Plan Timeline

**Stakeholder
Interviews; Data
Collection**

**January-December
2023**

**Destination
Readiness Indexes
Reviewed With
Committees**

July-December 2023

Sustainability Evaluation

January 2023-May 2024

June –July 2023

**Regional Advisory
Committees Formed**

**October-December
2023**

**Stakeholder Surveys,
Focus Groups, Digital
Marketing
Assessments**

**July-December
2024**

**Recommendations
Developed; Plans,
Implementation
Paths Finalized**

Contact the Team

Volunteer. Comment. Make Suggestions. Participate in the Future of California Tourism!



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California Luxury Forum

- October 22-25, 2023, in West Hollywood
- High-end Experiential Meetings
- 45 Buyer and 45 Suppliers
- 2 Post-FAMs





Roadshows

- New Jersey
- Boston
- Washington, D.C.
- Chicago

Trade Shows

- Cvent Connect
- PCMA CEMA
- ASAE
- Connect Marketplace
- Northstar Destination California
- IMEX
- American Express INTER[action]
- Northstar Leadership Forum
- Prestige Partner Conference
- MPI WEC
- PCMA EduCon



FY23/24 Global Events Calendar

- **October 16-19**
Brand USA Travel Week
 - **October 22-25**
California Luxury Forum
 - **October 25-29**
California Luxury Forum Post-FAMS
 - **October 25-27**
ITB Asia
 - **November 15-16**
Mexico Media Retreat
 - **December 4-7**
ILTM Cannes
 - **December 3-6**
Western Canada Trade Roadshow
 - **February 25-27**
Connections Luxury
 - **February 26-29**
Go West Summit
 - **May 3-7**
IPW
 - **May 8-12**
IPW Post-FAMs
 - **May 8-12**
Cal Cup
- 



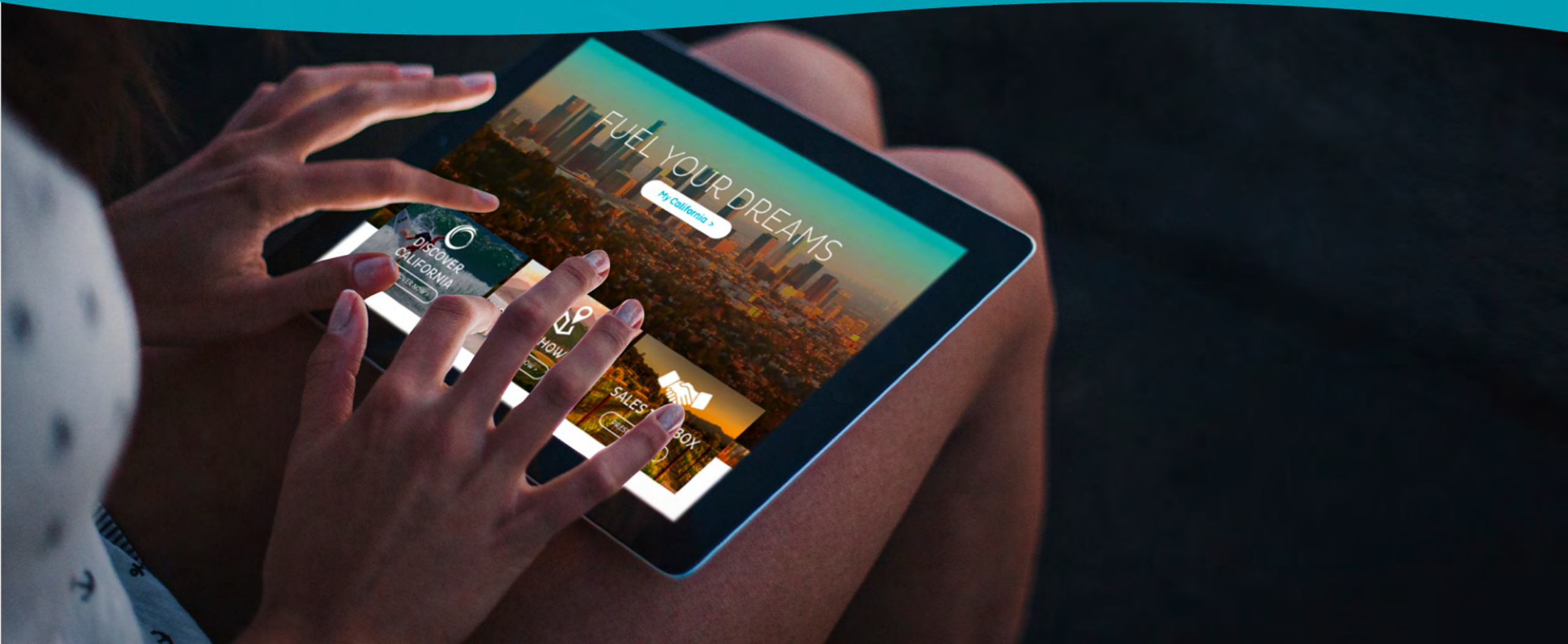
Stronger Together



CALIFORNIA WELCOME CENTER



California STAR Program





VISIT CALIFORNIA

TOURISM

UNIVERSITY

The background image shows a street scene in San Jose, California. On the left, there is a building with a red awning and a sign that says "AMERICAN". In the foreground, there are people walking on the sidewalk, including a person with a dog. The scene is partially obscured by a large teal overlay that contains the text.

Fall Board Meeting San Jose

October 10, 2023

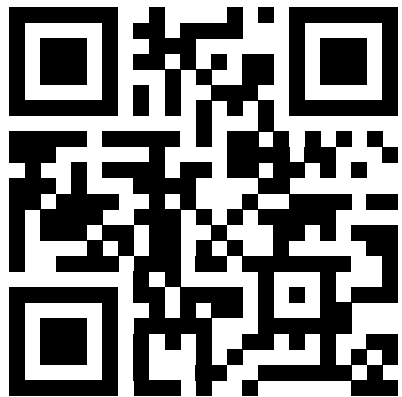
2024 VISIT CALIFORNIA

Outlook

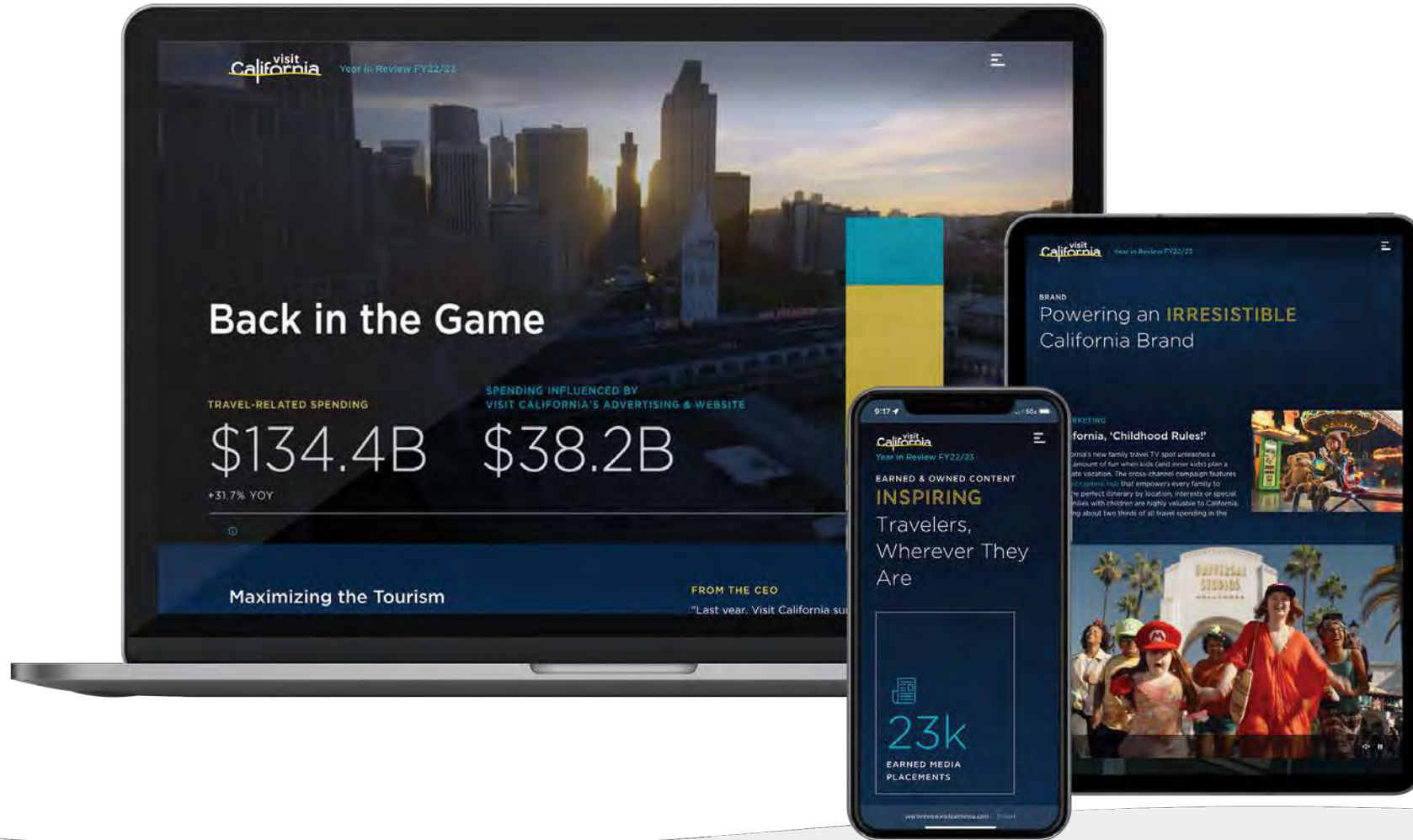
FORUM

Westin Rancho Mirage
Golf Resort & Spa
March 11-13, 2024

Register Today!



Year in Review. VisitCalifornia.com



visit
California



**CALIFORNIA
TRAVEL
ASSOCIATION**

Tourism's United Voice

visit
California

