

visit
California

It's Working: Dreaming Big for the Golden State

Visit Santa Barbara Fall Travel Outlook

Oct. 9, 2019



Caroline Beteta

President & CEO

Visit California





Global Programs Driving Intent to Visit



Challenges Ahead



We're Stronger Together



Our Mission:
Create desire for the California experience

Who is Visit California

- Founded in 1996
- Nonprofit 501(c)(6)
- Global Marketing Programs in 14 Markets
- \$131 Million Annual Global Marketing Investment
- Over 21,000 Assessed Businesses



Board Leadership



Wolfgang Puck
catering



CASA de FRUTA

Disneyland
RESORT

enterprise



FAT FAMILY
RESTAURANT GROUP

Marriott



HILTON
WORLDWIDE

Hertz

LEGO
LEGOLAND
CALIFORNIA RESORT



HORNBLOWER
CRUISES & EVENTS

HYATT
HOTELS & RESORTS

ACCOR HOTELS



INTERSTATE
HOTELS & RESORTS

Grapeline
Wine Tours

PURE LUXURY
TRANSPORTATION
Committed to Perfection

Los Angeles



Evans Hotels

Montage
HOTELS & RESORTS

SAN FRANCISCO
TRAVEL ASSOCIATION

avis budget group

Martin Resorts
A collection of premier hotels on California's Central Coast

UNIVERSAL STUDIOS
HOLLYWOOD

PEBBLE BEACH
COMPANY

RH
RIDGEMONT
HOSPITALITY

RODNEY STRONG
VINEYARDS

Littler

Visit California Leadership



**James
Bermingham**

Chair
Montage
International



Gene Zanger

*Vice Chair of
Marketing*
Casa De Fruta
Parkway, LLC



Paula Beck

*Vice Chair of
Operations*
Avis Budget Group,
Inc.



Dan Gordon

*Chief Fiscal
Officer*
Gordon Biersch

DMO Leadership Council

Kimberly Adams

Visit Temecula Valley

Jay Burress

Visit Anaheim

Joe D'Alessandro

San Francisco Travel
Association

Chuck Davison

Visit SLO CAL

Ed Fuller

OCVA

Linsey Gallagher

Visit Napa Valley

Kathy Janega-Dykes

Visit Santa Barbara

Misti Kerns

Santa Monica Travel & Tourism

Tom Kiely

Visit West Hollywood

Kelly Miller

Visit Huntington Beach

Gary Sherwin

Newport Beach & Co.

Joe Terzi

San Diego Tourism Authority

Mike Testa

Visit Sacramento

Claudia Vecchio

Sonoma County Tourism

Julie Wagner

Beverly Hills CVB

Scott White

Greater Palm Springs CVB

Ernie Wooden

Los Angeles Tourism &
Convention Board

Committee Leadership

BRAND & CONTENT

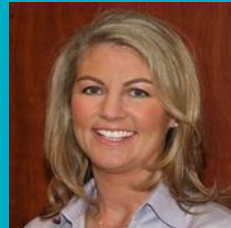


Chair:
Agnelo
Fernandes



Vice Chair:
Charles
Harris

INTERNATIONAL



Chair:
Kathy Smits



Vice Chair:
Gary Orfield

RURAL



Chair:
Laurie Baker



Vice Chair:
Wes Rhea

PUBLIC RELATIONS



Chair:
Stephen
Andrews



Vice Chair:
Candice Eley

EDITORIAL



Chair:
Kathy Janega
Dykes



Vice Chair:
Sonya Bradley

RESEARCH & ROI



Chair: Susan
Bruinzeel

SNOW

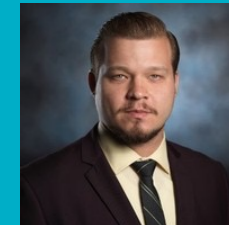


Chair:
Christine
Horvath



Vice Chair:
Matt
Peterson

WELCOME CENTERS



Co-Chair:
Andrey
Gorbachenko



Co-Chair:
Jennifer
Rodriguez

USA

visit
California

INSPIRATION

PLANNING

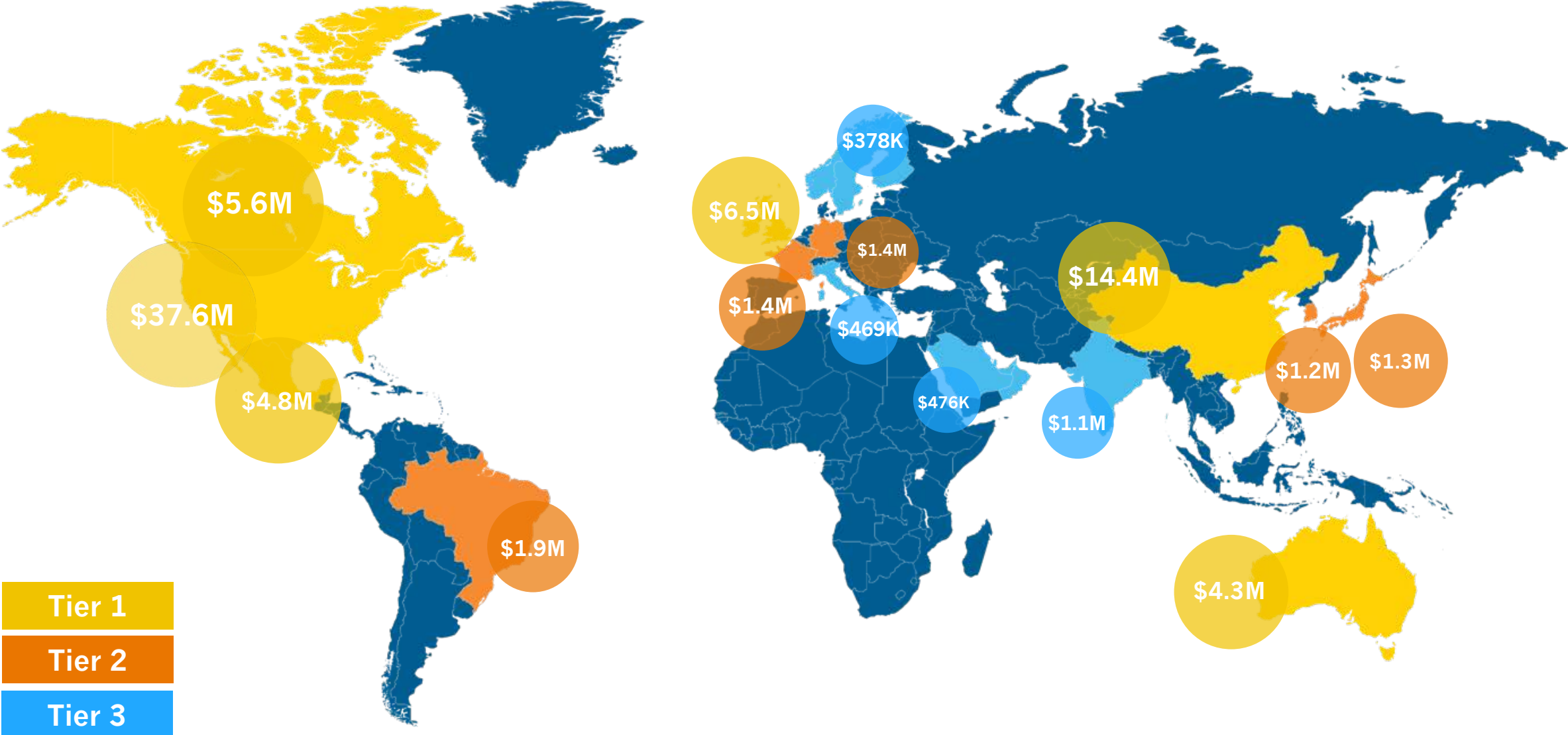
TRANSACTION



RENTAL CARS
ACCOMODATIONS
ATTRACTIONS
RESTAURANTS & RETAIL
TRANSPORTATION

FY19/20

Global Investments



- Tier 1
- Tier 2
- Tier 3

A light blue outline map of California is centered in the background, showing county boundaries. The text is overlaid on this map.

California
dream
big



‘Spoiled’



‘Parents Love It’



2018 Ad-influenced Visitor Spending

\$13.95 Billion

A woman wearing a light-colored hat with a dark band featuring three stars is smiling and looking towards the left. She is holding a wine glass. The background is a blurred outdoor setting, likely a wine festival or tasting event, with other people and wine glasses visible. A semi-transparent blue overlay covers the middle of the image, with the text "New Platforms" centered on it.

New Platforms



CALIFORNIA
TASTEBLAZERS

CALIFORNIA TASTEBLAZERS



Curated



User Generated



Owned



ROAD TRIP REPUBLIC™

‘Born To Be Wild’



**33 Million
Global Audience**



Visit California (MX) Like Page

Published by Comercial Mexico [?] · 10 September at 08:00 · 0

Buenos días desde Visit Santa Barbara, ¿Qué es lo que más te gusta de #California?

--

posesawkwardly
http://bit.ly/2LDgvQI

See Translation



Ventura, Santa Barbara & Beyond

California's many charms burst into vivid display on this 180-mile drive along the coast. The journey ranges from lively urban scenes in Santa Monica and Santa Barbara's Funk Zone to the natural beauty of Malibu, where the Santa Monica Mountains plunge to the edge of the Pacific. And with stops for seafood, premium craft beers, and wine tastings, this unforgettable road trip is positively delicious, too.



California NOW

News Trip Ideas Destinations Videos Visitcalifornia.com

California NOW News and Trip Ideas From the Golden State VISIT NOW

Ron Thomas/Getty Images

TRIP IDEAS · SANTA BARBARA · SANTA BARBARA COUNTY · MUSEUMS · TASTING ROOMS · WINE

31 Reasons to Plan a Trip to Santa Barbara

This sunny beach city is open for business, providing travelers abundance, beauty, and a delightful getaway

Posted February 01, 2018

California dream big

Discover the Central Coast > Spotlight: Santa Barbara

E-NEWS MAP

California dream big

FOOD | FAMILY | ROAD TRIPS | OUTDOORS | PODCAST

INSIDER'S GUIDE TO SANTA BARBARA

See why this gorgeous city—blessed with near-perfect weather and ocean-to-table eateries—is called "the American Riviera."

[LEARN MORE](#)

California NOW

News Trip Ideas Destinations Videos Visitcalifornia.com



NEWS · SANTA BARBARA · SANTA BARBARA COUNTY · SANTA YNEZ · RESTAURANTS · TASTING ROOMS · WINERIES · WILDLIFE

The New York Times' 36-Hour Santa Barbara Travel Guide

Use this weekend itinerary to help plan your next trip to the American Riviera

California dream big

Sit back. Relax. And soak up some California Love

GET YOUR FREE VISITOR'S GUIDE!

Trending



EVENTS

29 Sensational September Events

California dream big

SANTA BARBARA'S LUXURY RESORTS

Spotlight: Santa Barbara

SANTA BARBARA'S LUXURY RESORTS

A host of travel magazine-worthy resorts and spas line this stretch of the Central Coast

MORE RESOURCES

Consider [Belmond El Encanto](#), with terraced gardens and sweeping views of the Pacific. Perched in the hills above town, it feels like a private enclave that doesn't draw attention or flash—just pure relaxation and sigh-worthy settings. Pull on a fluffy robe from the closet of your classic bungalow to

IN the mood for some perfect pampering in a breathtaking setting? Santa Barbara has plenty of ways to make sure you're happily spoiled. Lodgings here specialize in laid-back luxury, with settings ranging from hilltop areas, to secret bungalows, to edge-of-the-sea dazzlers.

Consider [Belmond El Encanto](#), with terraced gardens and sweeping views of the Pacific. Perched in the hills above town, it feels like a private enclave that doesn't draw attention or flash—just pure relaxation and sigh-worthy settings. Pull on a fluffy robe from the closet of your classic bungalow to

SANTA BARBARA RESORTS & SPAS

BELMOND EL ENCANTO



CALIFORNIA'S MICHELIN MOMENT

The Golden State now boasts 90 starred restaurants, ranging from San Diego to Mendocino County. Check out the newest recipients.

[LEARN MORE](#)



Forbes

FOOD & WINE
EN ESPAÑOL

InStyle
México

Earned Media

- 400 Placements
- \$29 Billion Media Value
- 55 Media and Influencers Hosted in Santa Barbara

Travel Trade

- IPW Plaza Pioneer
- 12 Trade Show and Missions
- 8 Familiarization Tours



Middle East CEO Mission

SANTA
MONICA
TRAVEL & TOURISM

VISIT
SANTA BARBARA
THE AMERICAN RIVIERA

VISIT
Newport
BEACH
CALIFORNIA

Los Angeles

VISIT
THE
OC

BEVERLY
HILLS

West
Hollywood

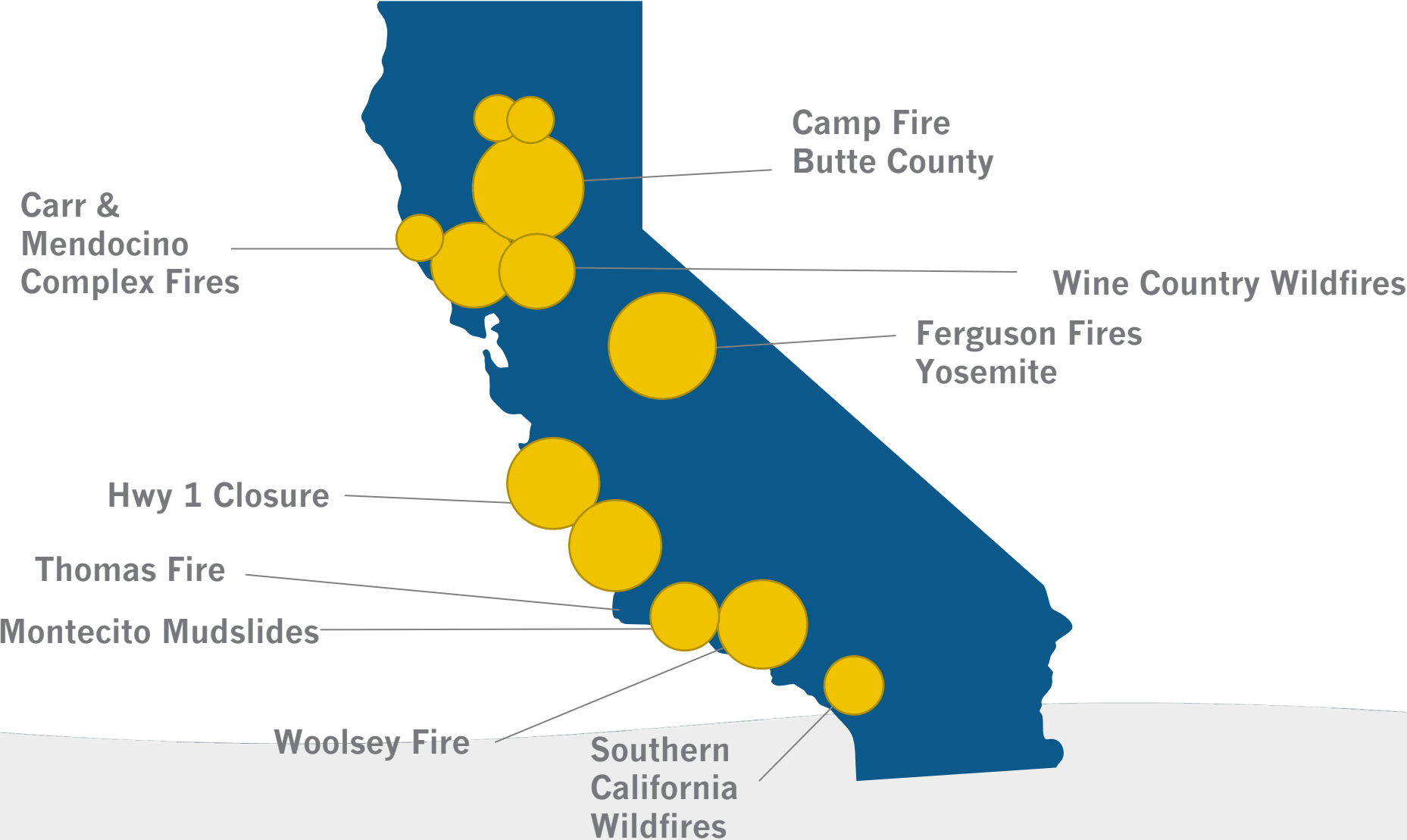
TRAVEL + TOURISM BOARD





Helping Communities Recover

Key Crisis Impact Zones



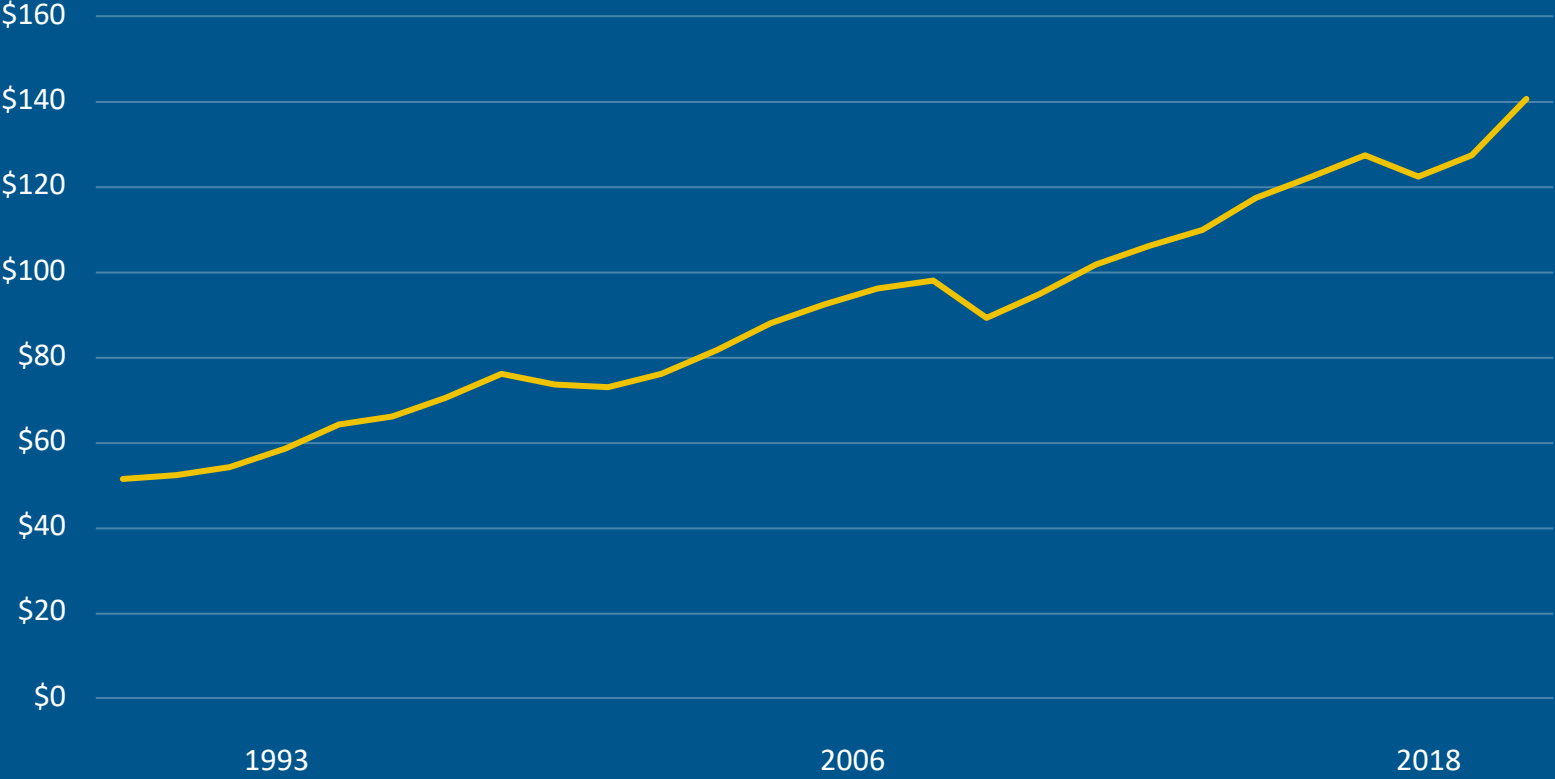
Key Crisis Response Tactics

- Emergency Funding
- Messaging Support
- Open for Business Seminars
- Crisis Committees
- Redefining Media Narratives
 - PR Activations
 - PSA
 - West Coast Travel Facts



Tourism Drives California

9 Years of Growth



\$140.6
billion

TRAVELER
SPEND 2018

Source: Dean Runyan

Coming Soon...

- Global Website Rollout
- Dream Big 2.0 Evolved Positioning
- Brand Health Study
- Sports Marketing Partnership
- Global Tripadvisor Activation
- New California Welcome Centers
- Development of 2020-2022 Two Year Plan



Challenges Ahead

Current Market Conditions

1. Tepid Summer
2. International Travel Declines (including Asia)
3. Influx of New Inventory
4. Hotel Softening
5. Revised Economic Forecasts
6. Upcoming Political Year



Destination Marketing



Destination Management

SURVEY:

Industry.VisitCalifornia.com/Stewardship



The background image shows a courtyard area of a building with white walls and arched windows. There are several palm trees and other plants. A large teal semi-transparent rectangle is overlaid on the image, containing the text "Stronger Together".

Stronger Together

VOTE YES

MARKETING RENEWAL

November 27: Ballots mailed

December 31: Voting concludes

January 2020: Results announced

February 2020: Outlook Forum



VOTE  **YES**
MARKETING RENEWAL

renew.VisitCalifornia.com



Renewal Task Force

James Bermingham

Joe D'Alessandro

Noreen Martin

Chuck Davison

Christophe Kandziora

Gene Zanger

Jay Jamison

Wes Rhea

Anthony Cannella

Scott White

Jeff Senior

Kathy Janega-Dykes

Sandy Murphy

Dan Harvey

Offer Nissenbaum

John Porter

Travis Scott

Jay Burress

Tony Bruno

Ed Fuller

Johnathan Whitehead

Paul Sanford

Jordan Meisner

Kevin Carroll

Mariann Castello

Bertin Salas

Linsey Gallagher

Barbara Steinfeld

Karolyn Kirchgesler

Mike Gallagher

Ted Burke

Maggie Ivy

Karl Rice

“Without Visit California, marketing the state as a tourism destination would end – endangering the tourism industry and threatening its growth.”

James Bermingham
Visit California Board Chair
Montage International