

PRESS PLAY ▶

A YEAR IN REVIEW



visit
California

FISCAL YEAR 22/23



YEAR IN REVIEW

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State of California

Governor's Office of Business and Economic Development

VISIT CALIFORNIA

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About This Report

Year In Review is an annual publication of Visit California, compiled in compliance with the California Travel and Tourism Commission Bylaws Article X Section 6b. Articles contained in Year in Review may be reproduced without permission (though acknowledgment is appreciated). Direct all inquiries and correspondence to:

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On the Cover: California's tourism industry pressed PLAY, defying recovery predictions and shining brightly as "The Ultimate Playground" after the pandemic.

ABOUT VISIT CALIFORNIA

The California Travel and Tourism Commission, doing business as Visit California, is a 501(c)(6) nonprofit corporation formed to market California as a desirable tourism destination. Visit California works in close coordination with California's Office of Tourism—in accordance with the California Tourism Marketing Act, Government Code Section 13995, Visit California conducts marketing programs that drive visitation, while the Office of Tourism oversees the assessment collection to fund these initiatives.

The tourism assessment has helped the industry market California as a world-class destination for more than 25 years. Inspired by agricultural commodity boards, California's tourism industry established this self-imposed assessment with the goals of creating a reliable source of funding for statewide tourism marketing and maintaining California's status as one of the top tourism destinations worldwide. For more information visit industry.VisitCalifornia.com.

Mission

Visit California is a nonprofit organization with a mission to develop and maintain marketing programs—in partnership with the state's travel industry—that keep California top of mind as a premier travel destination.

Guiding Principles

Visit California measures all efforts on behalf of the industry against its guiding principles. These five foundational principles continue to steer the organization in all marketing initiatives.

1. Do what the industry cannot do for itself. Deliver value to and collaborate with tourism-related businesses.
2. Build awareness and preference for the California brand to stimulate travel.
3. Use key metrics and ROI to inform the strategic direction of the program of work overseen by the board.
4. Reflect the diversity and inclusivity of California throughout the organization, partner agencies and the program of work.
5. Employ destination stewardship principles to guarantee the sustainability of travel and tourism in California.



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Record-Setting ROI
Paid advertising generated a historic \$38.2 billion in traveler spending, boosted by state stimulus funding.

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Fiscal Efficiency
Only 7% of the organization's budget funded operational costs.

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State of Tourism
California recovered market share and bounced back from pandemic losses.

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International Rebound
Marketing returned in 13 global markets to bring back high-value travelers.

MOVING FORWARD

FROM THE CEO

This year California's tourism industry pressed PLAY, bouncing back from the pandemic stronger than anyone predicted. California's travel industry emerged unified and continues to shine, luring visitors curious about the abundance of world-class experiences and fun-loving culture.

California's tourism industry grew by one-third last year and is poised to set new records for visitor spending, employment and tax generation in 2023. In fact, projections from Tourism Economics for 2023 show California will surpass the record \$144.9 billion in visitor spending achieved in 2019 — a year earlier than originally expected.

Last year, Visit California's 52-week global marketing work delivered an incremental \$38.2 billion of visitor spending. Fueled by a one-time stimulus from the state, this historic visitor spending is more than three times higher than a typical year and helped California recover market share lost during the pandemic.

California is officially back in the game and focused on the continued rebound of international travel. As global travel ramps back up, the organization is working hard to reenter its most critical markets around the world to bring travelers to the Golden State. Visit California reestablished programs in 13 global markets in FY22/23, helping keep

California as a must-visit destination for travelers from around the globe. In the past year, Visit California led two CEO missions — one to Japan, the other to Europe — to rekindle those relationships and put California top of mind for trade and industry partners. International visitors are critically important because they stay longer, giving them the opportunity to spend more within the state.

Visit California is inspiring visitors to play every day with a year-round 24/7 “always-on” marketing program inspiring travel to the Golden State. The global marketing program reflects the diverse destinations, cultures and perspectives that define California. In February, the newest integrated campaign, “Childhood Rules” launched, targeting family travelers. Family travel is responsible for 82% of ad-influenced travel spending.

This fiscal year also marked the launch of a first-of-its-kind brand initiative for the state, Visit Native California, which highlights cultural heritage tourism experiences visitors can discover from the more than 100 federally recognized tribes that call California home. The launch received an unprecedented amount of coverage and interest — both internationally and domestically.

Unity has been the cornerstone of the tourism industry's success. The industry-guided global program of work is designed to deliver for every region and tourism-related business, demonstrating that we are stronger together. The organization's cooperative marketing platforms allow destinations and businesses to reach a larger audience, including the expanded leveraged media partnership that amplified 37 destination and business efforts to reach domestic and international audiences.

Thank you, Team California, for the remarkable progress in FY22/23 to move the tourism industry forward.



Caroline Beteta
President & CEO
Visit California



RETURN ON AD SPENDING

Paid Marketing is Working: Record Incremental Visitor Spend

Visit California's media and website investment, with a boost from state stimulus, generated an incremental spend of \$38.2 billion, resulting in \$2.4 billion of incremental tax revenue. This is spending and tax revenue that would not have happened without Visit California's paid advertising campaigns.

\$38.2 BILLION

INCREMENTAL SPEND

\$2.4 BILLION

INCREMENTAL TAX REVENUE

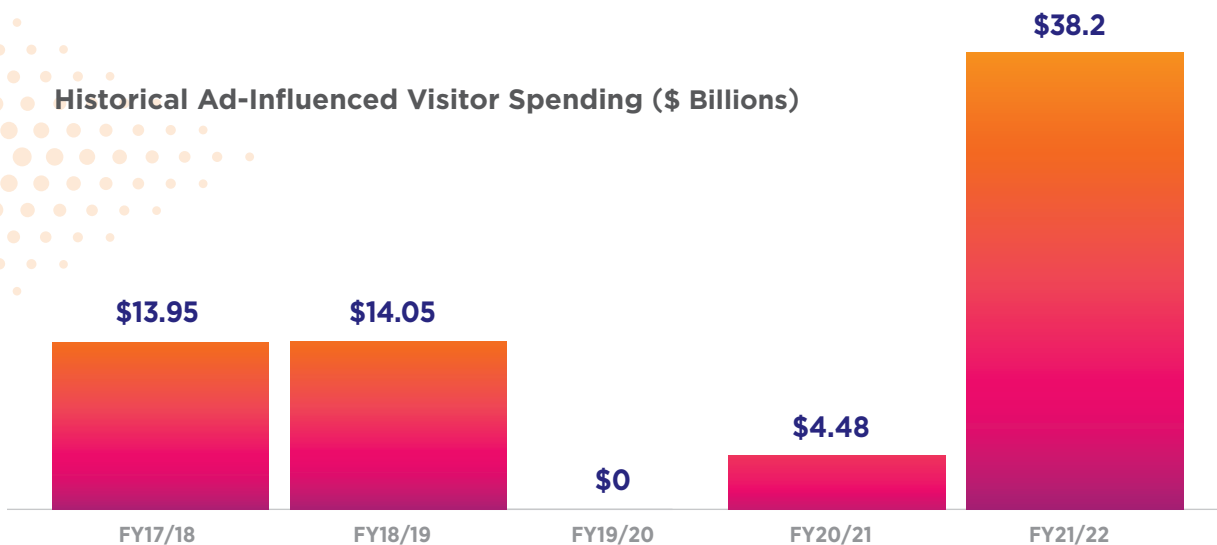
Source: SMARInsights

Methodology

Visit California evaluates the effectiveness of its paid advertising by calculating the incremental spend from ad-aware visitors. Measuring incremental travel produces a conservative measure of advertising impact. It is assumed that a percent of travelers visit a destination regardless of advertising efforts, and this percent becomes the baseline of measurement. In calculating the effectiveness of its paid campaigns, Visit California only measures the percent of travelers above that baseline. The additional level of travel is considered influenced or incremental.



Historical Ad-Influenced Visitor Spending (\$ Billions)



GAME-CHANGING YEAR

FROM THE CHAIR

I am honored to serve as chair of the Visit California Board of Directors, following my time on the board serving as chief fiscal officer and vice chair of operations. The organization closed the fiscal year strong, under the collective guidance from the industry and exemplary leadership of outgoing chair Gene Zanger, Partner of Casa de Fruta Parkway.

Fiscal responsibility has been and will continue to be a top priority for Visit California. I am pleased with the organization's streak of perfect unqualified audits for the 25th consecutive year, a testament to the diligent stewardship of Visit California's operations. Every dollar entrusted is used for the purpose it was given: to do what the industry cannot do for itself. In FY22/23, more than 92% of the budget directly funded marketing initiatives to increase visitor spending at the state's tourism-related businesses. Only 7% was used for operations, which is significantly below the national average for state tourism board operations.

The industry-funded global marketing program — supercharged by the state's stimulus — delivered record-setting returns on advertising spending, benefiting every region and every segment — accommodations, car rentals, retail, restaurants, attractions and transportation businesses across the state. Visit California's paid advertising campaigns resulted in historic incremental visitor spending of \$38.2 billion — this is spending that would not have occurred without Visit California's marketing efforts, and it accelerated the industry's recovery by a full year.

However, as we reflect on milestone achievements this year, we must also acknowledge the challenges that our industry continues to face. The road to recovery remains uneven with international visitation still lagging prepandemic numbers, and workforce challenges continue to plague businesses across the state. While obstacles are always present, we've learned there is always greater strength in unity.

Travel matters, because while travelers are creating memories during their visit, they are also bringing economic vitality to our great state. The tourism industry serves as a driving force, generating billions of dollars in revenue for businesses, directly supporting 1.1 million jobs for California workers, and providing vital tax revenue for local communities. It is our collective responsibility to nurture this industry.

As we look to the future, we will continue to adapt to the ever-changing landscape, leveraging technology, data-driven insights and the collective brilliance of our team and industry partners to forge ahead. I am humbled by the trust you have placed in me as your chair, and I am committed to working tirelessly alongside every one of you to advance the mission of Visit California.



Dan Gordon

Dan Gordon
Chair, Visit California
CEO, Gordon Biersch

FISCAL RESPONSIBILITY

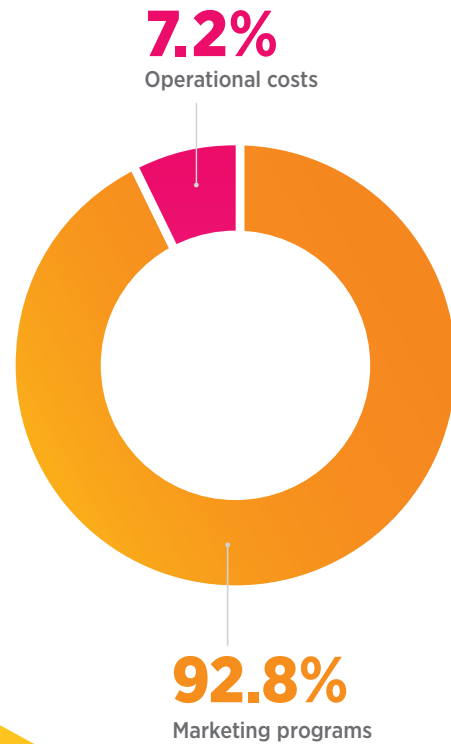
As a 501(c)(6) nonprofit, Visit California strives to minimize operational costs and maximize the ROI for the industry.

Industry Investment

The investment of more than 16,000 assessed businesses across all tourism segments is leveraged to benefit the entire tourism industry. Together, accommodations, attractions, rental cars, restaurants, retailers and transportation businesses are funding Visit California marketing that increases travel spending in the Golden State. This year the legislature approved \$15 million in stimulus funding allocated solely toward domestic media; none of these funds were used for Visit California operational costs.

Expenditure Efficiency

According to an independent third-party audit, 92.8% of Visit California's budget goes directly to marketing programs, with 7.2% going to operational costs. Nonprofit organizations average between 20% to 35% of their budgets on operational costs.



Financial Priorities

Visit California's financial objective is to ensure the industry's investment is executed for the purpose it was given: to do what the industry cannot do individually.

1. Provide accurate, complete and transparent reporting on the financial performance of the organization.
2. Ensure the organization is compliant with all laws, bylaws and internal policies and procedures.
3. Ensure all financial interactions with external parties enhance relationships and build trust in Visit California's commitments.
4. Provide industry partners best-in-class service to help ensure their success.



25 YEARS

Visit California continued its history of perfect, unqualified audits for the 25th consecutive year.

ECONOMIC IMPACT

The long road to recovery has led the industry to where it is today — ready to welcome travelers from around the world.



\$134.4 BILLION

VISITOR SPENDING*

1.1 MILLION

TOURISM-RELATED JOBS*

Benefiting All Californians

\$11.9 BILLION =

STATE AND LOCAL TAX REVENUE*



\$906

IN TAXES SAVED

FOR EVERY CALIFORNIA HOUSEHOLD



191,000

PUBLIC SCHOOL TEACHER SALARIES

AVERAGE \$62,301

Source: Salary.com



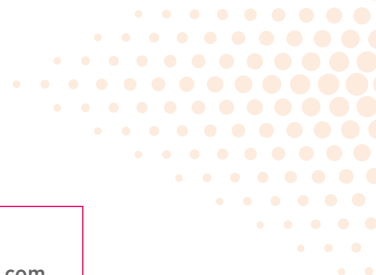
57,854

MILES OF TWO-LANE ROAD

\$205,688 PER MILE

Source: Midwest Economic Policy Institute study adjusted for inflation

*Source: Tourism Economics

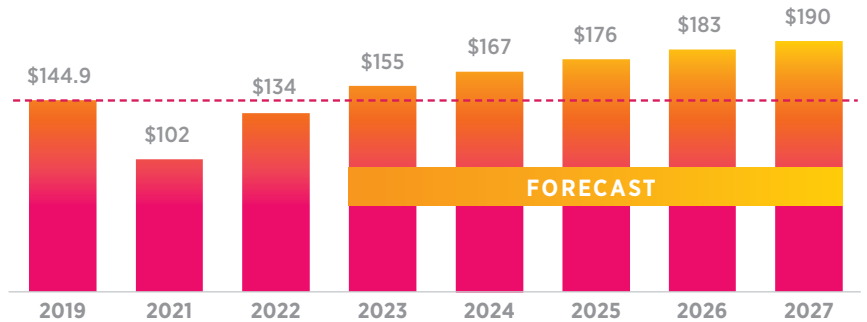


Full Recovery

Visitor spending continued to grow in 2022, reaching 92% of prepandemic levels. Domestic business and international continue to show year-over-year progress with projections for full recovery by 2024 – earlier than initially projected.

California Travel Spending Forecast

Visit California updates the forecast throughout the year; for the most updated forecast visit industry.VisitCalifornia.com.



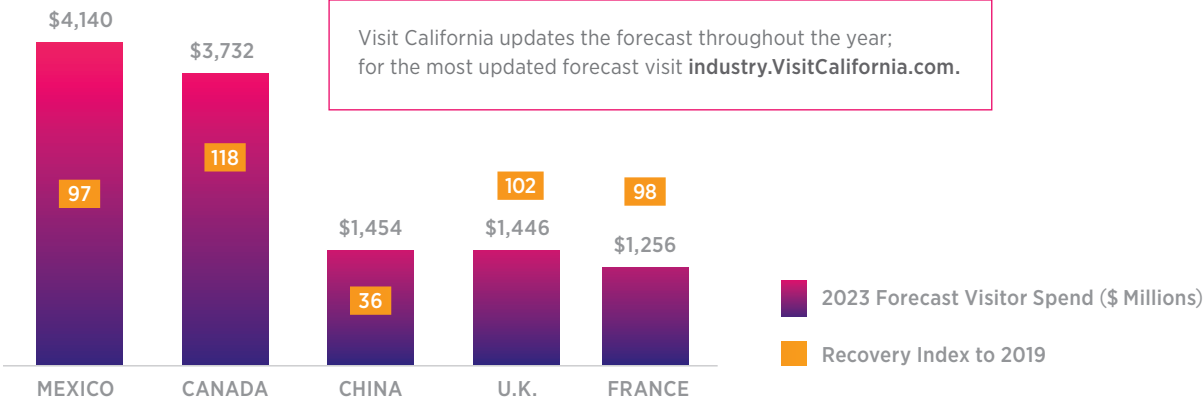
Source: Tourism Economics (May 2023)

Global Rebound

Mexico and Canada lead the way in international visitor spending, followed by China. Notably, China ranks third in visitor spending and yet is only 36% recovered, providing a valuable opportunity with continued recovery of the market.

Visitor Spending Forecast by International Market

Visit California updates the forecast throughout the year; for the most updated forecast visit industry.VisitCalifornia.com.

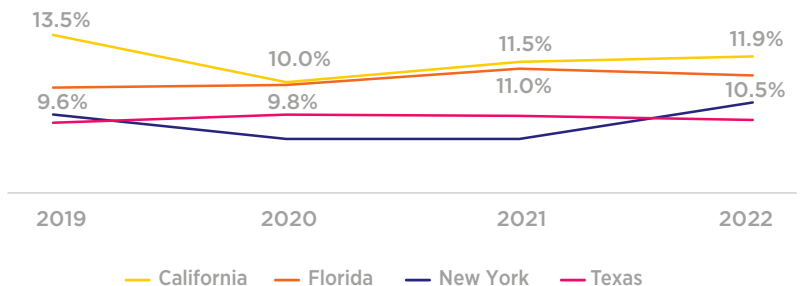


Source: Tourism Economics (May 2023)

Leading Market Share

Despite market share losses over the past three years, California has maintained its position as the No. 1 state in the U.S. for travel and tourism. Each percentage point represents \$12 billion of visitor spending, creating a highly competitive environment among destinations. The return of international travel, particularly Asia, will be critical to reaching prepandemic market share levels.

Share of U.S. Travel Spending



Source: SMARInsights

GLOBAL TRAVEL REACTIVATED INTERNATIONAL MARKETING

In FY22/23 Visit California resumed marketing in 13 key international markets, a significant step toward international recovery.

\$17 BILLION
INTERNATIONAL
VISITOR SPENDING*

**In 2019, international visitor spending was \$28.1 billion (Tourism Economics)*

\$12.5 MILLION
INTERNATIONAL
ADVERTISING INVESTMENT

1.34 BILLION
IMPRESSIONS

California's International Investments

Visit California monitors evolving market conditions to ensure investments are maximized and deliver the highest ROI.

Market	FY22/23 Investment	Years in Market
United Kingdom	\$7.08 million	24 years
Canada	\$5.1 million	14 years
Mexico	\$4.79 million	16 years
Australia	\$1.27 million	19 years
France	\$1.2 million	14 years
Japan	\$810,000	23 years
Germany	\$750,000	25 years
South Korea	\$645,000	14 years
China	\$625,000	13 years
India	\$278,000	15 years
Middle East	\$269,000	4 years
Scandinavia	\$78,000	19 years
Italy	\$78,000	14 years

Consumer Advertising Delivers Impact

In Canada, Mexico and the U.K., direct-to-consumer paid advertising resumed this spring in an exciting step toward prepandemic normalcy. In Canada and Mexico, “California Road Trip Republic” and “Childhood Rules” campaigns launched in market, including out-of-home, search engine marketing, online TV and social media. Additionally, a co-branded partnership with Air Canada inspired consumers to choose California. In the U.K., “Am I Dreaming?” and “California Road Trip Republic” creative ran across both digital and out-of-home platforms, and in partnership with Expedia Group, Visit California activated a large out-of-home campaign that included takeovers of digital boards at various airport terminals.

Additionally, Visit California launched a direct-to-consumer campaign on China’s largest online travel agency Ctrip.com, featuring “See You Soon” messaging that directed interested travelers to the newly updated California hub on the popular platform. The campaign also ran on digital platforms Mafengwo and iPinYou.

In Japan, localized “Am I Dreaming?” creative ran in train stations and on convenience store monitors throughout Shibuya Scramble Square as well as in H.I.S. travel shops generating 24.5 million impressions.

Rekindling Relationships

Visit California and its in-market international teams provided several platforms for destinations and businesses to engage, network and rebuild relationships with international media and travel trade to bring travelers to California.

For more activity highlights, see Page 24.



In addition to Visit California President & CEO Caroline Beteta and senior staff, Deputy Ambassador Matthew Palmer and 17 tourism CEOs from Visit SLO CAL, Sonoma County Tourism, West Hollywood Travel + Tourism Board, Monterey County Convention & Visitors Bureau, Visit Newport Beach, Visit Santa Barbara, Los Angeles Tourism & Convention Board, Visit Greater Palm Springs, Casa de Fruta Parkway, San Diego Tourism Authority, Visit Anaheim, San Francisco Travel, Santa Monica Travel & Tourism, Visit Napa Valley, Visit Huntington Beach, Mammoth Lakes Tourism and Gordon Biersch traveled to Europe for a CEO Mission.



The Lt. Governor, along with the Governor's Office of Business & Economic Development, Visit California President & CEO Caroline Beteta and senior staff and 12 tourism CEOs from Visit SLO CAL, Visit Newport Beach, Visit Santa Barbara, Los Angeles Tourism & Convention Board, Beverly Hills Convention & Visitors Bureau, Visit Greater Palm Springs, Casa de Fruta Parkway, San Diego Tourism Authority, Santa Monica Travel & Tourism, Visit Napa Valley, San Diego County Regional Airport Authority and Ridgmont Hospitality traveled to Japan for a CEO mission.

CEO Missions Return

Europe

The inaugural European CEO mission connected the California delegation of 17 tourism CEOs with top C-suite industry professionals from the diplomacy sector, tour operators and airlines, as well as with top editors and leaders from the travel and culinary world. The three-day program included discussions focused on market development, trend forecasting and intelligence gathering to help refine California's tourism marketing strategies.

11
TOTAL EVENTS

265
MEDIA & TRADE GUESTS

Japan

Visit California and 12 California tourism delegates joined a 100-member delegation for the California Japan Trade Mission co-led by Lt. Gov. Eleni Kounalakis and Dee Dee Myers, Senior Advisor to the Governor and Director of the Governor's Office of Business and Economic Development. The delegation met with executives at the helm of Japan's leading travel sellers, airlines and news hubs to deliver a unified California tourism message. During the mission, Visit California also signed memorandums of understanding with two of Japan's largest tourism entities, the Japan Association of Travel Agents and H.I.S. Co. Ltd., to jump-start travel recovery.

20
ARTICLES
GENERATED

8
NEW PRODUCTS
DEVELOPED

71 MILLION
IMPRESSIONS

INSPIRING PLAYFUL VACATIONS NEW BRAND ADVERTISING

New Family Advertising

Visit California launched the highly anticipated new family spot, "Childhood Rules," in March. The creative showcases the abundance of family opportunities across California.

Integrated Campaign Launch

Coordinated efforts across paid, owned and earned media channels amplified the launch to reach travelers around the world. Paid efforts reached audiences through national linear TV, premium online TV, such as Hulu and YouTube TV, and through digital partnerships. Visit California was the first to market with the new Disney+ ad supported service reaching a prime family audience.

In anticipation of the debut, Visit California hosted a diverse group of family influencers who represented families of all sizes, needs and backgrounds.



▶ Pismo Beach

\$17.4 MILLION

TOTAL MEDIA INVESTMENT

902 MILLION

TOTAL IMPRESSIONS

29.7 MILLION

HOUSEHOLDS REACHED

9

DESTINATIONS FEATURED

8

FAMILY INFLUENCERS HOSTED

20

PRESS TRIP DESTINATIONS VISITED

2.5 MILLION

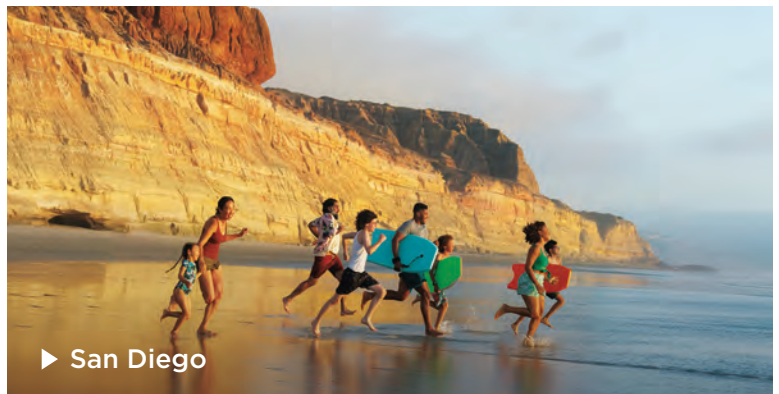
TOTAL POTENTIAL INFLUENCER REACH



▶ Universal Studios



▶ Paso Robles



▶ San Diego

Interactive Family Hub

Visit California launched a branded landing page and a family planning content hub that highlights key areas and family activities shown within the creative. The first-of-its-kind hub allows travelers to explore content by need, location or interest.

1.1 MILLION

FAMILY CAMPAIGN
WEBPAGE PAGEVIEWS

The Ultimate Playground

California is a fun and free-spirited destination that celebrates diversity and encourages travelers and residents to be themselves. This sentiment, reinforced through focus groups, helped shape an evolution in Visit California's brand positioning, leaning into California as the top place to vacation, a fun-loving place with a playful mindset and unparalleled abundance — the ultimate playground. A new global brand spot under this positioning is underway and will debut in FY23/24.



▶ Sonoma County



▶ San Francisco



▶ Santa Cruz



▶ San Gregorio



▶ LACMA Urban Lights

BY THE NUMBERS

PAID

\$64.5 MILLION

TOTAL MEDIA INVESTMENT

4.8 BILLION

TOTAL IMPRESSIONS

59 MILLION

HOUSEHOLDS REACHED

OWNED

15.4 MILLION

UNIQUE VISITORS TO
VISITCALIFORNIA.COM

3 MILLION

SOCIAL MEDIA FOLLOWERS

630

NEW CONTENT PIECES

24.3 MILLION

E-NEWSLETTERS SENT

3.2 MILLION

PARTNER HANDOFFS

210,000

PODCAST DOWNLOADS

EARNED

2,600

PLACEMENTS

6.7 BILLION

GLOBAL IMPRESSIONS

140

MEDIA AND
INFLUENCERS HOSTED

26.3 MILLION

POTENTIAL REACH

PUBLIC AFFAIRS

590

LEGISLATOR INTERACTIONS

\$15 MILLION

STATE STIMULUS SUPPORT

\$46 MILLION

ECONOMIC DEVELOPMENT
AGENCY GRANT



TRAVEL TRADE AND PROFESSIONAL MEETINGS & EVENTS

490

TRAVEL ADVISOR
APPOINTMENTS

18

GLOBAL TRAVEL TRADE
EVENTS ATTENDED

4,700

TRAVEL ADVISORS
IN DATABASE

10,300

MEETING PLANNERS
REACHED

15

MEETING PLANNER
EVENTS PARTICIPATED

INSPIRING TRAVELERS PAID ADVERTISING

‘Am I Dreaming?’ Commercial

Visit California’s marquee inspirational campaign continued to energize visitors. A successful fall and spring flight delivered results by reaching consumers through a robust linear TV buy, including premium placements during the March Madness college basketball tournament and with publishers such as AFAR, BuzzFeed and Disney. Custom digital experiences with Hulu and Disney online TV allowed viewers to interact with the spot in fun ways, further inspiring trip planning.



\$27.8 MILLION
TOTAL MEDIA INVESTMENT

2.1 BILLION
TOTAL IMPRESSIONS

59 MILLION
HOUSEHOLDS REACHED



▶ Los Angeles



\$4.7 MILLION
TOTAL MEDIA INVESTMENT

327 MILLION
TOTAL IMPRESSIONS

Gateway and Rural Road Trips

Since launching in 2019, “Born to be Wild” has declared California the top destination for road trips — whether a drive down an iconic coastal highway or a multi-day adventure into rural areas of the state. This year, Visit California refreshed the creative to include three major gateway destinations: Los Angeles, San Diego and San Francisco. This refresh is critically important to expanding the campaign in international markets, as gateways are immediately recognizable and typically are the beginning and end points of international trips.



▶ San Diego

Co-ops Expand Partner Reach

The domestic Leveraged Media Co-Op program continued to deliver substantial value to the industry by extending marketing dollars and providing opportunities to reach more domestic consumers.

This year, Visit California expanded the program to reach an international audience. In partnership with Brand USA, partners can reach consumers in Tier 1 markets—Canada, Mexico and the U.K.—with co-branded “California Road Trip Republic” messaging. The campaign launched in spring 2023 and is open for participation until May 2024.

715,000
VISIT CALIFORNIA
INVESTMENT

38
INDUSTRY
PARTNERS

231 MILLION
IMPRESSIONS



Shining a Culinary Spotlight on California

California’s focus on culinary innovation and sustainability was recognized in both the 2022 and 2023 Michelin guides debuted through star revelation events in Los Angeles and Oakland. The newest guide was released in July featuring 614 restaurants including 15 Green Stars for sustainability practices—the most in the U.S.

'ALWAYS ON' OWNED CHANNELS

With an “always-on” approach, Visit California’s owned channels reach 22 million consumers through social media, e-newsletters, podcasts, publications and blog posts.

Publications That Inspire and Inform

Timed with the anticipation of summer travel, Visit California produces a “California Road Trips” guide. This year, the publication featured Dwyane Wade, a three-time NBA champion, dad and Napa Valley winery owner.

The guide includes 13 new action-packed itineraries, each beginning and ending at one of California’s 27 commercial airports, highlighting how easy it is to fly into any region of the state to embark on an unforgettable road trip.

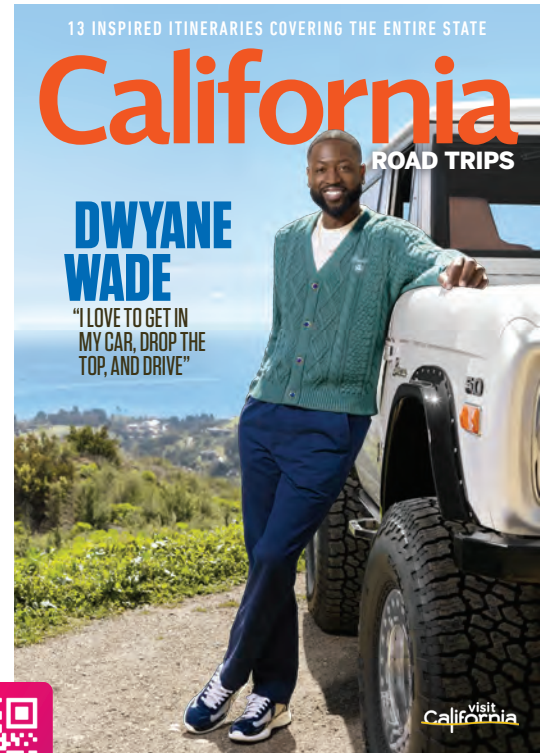
Reaching travelers during a key trip planning period, the 2023 “California Visitor’s Guide: The Best of California” was released in January. It features actress and entrepreneur Jessica Alba, as well as insider tips to inspire future travel. Alongside this publication, Visit California released the 2023 Official State Map, serving as yet another valuable resource that is infused with inspiration for noteworthy drives, car rental options and California Welcome Center locations.

The publications are packaged alongside popular consumer magazines Food & Wine, Travel + Leisure and All Recipes and are available at California Welcome Centers for travelers looking for additional inspiration during their trips.

2.5 MILLION
COPIES DISTRIBUTED

254
BUSINESSES FEATURED

164
DESTINATIONS
FEATURED



SCAN TO VIEW



SCAN TO VIEW

SHARING NATIVE STORIES

This year Visit California debuted a first-of-its-kind initiative, backed by grant funding from the U.S. Economic Development Administration, to honor the state's cultural heritage and provide native voices a platform to tell their stories and share the wide range of tribal tourism opportunities.



Visit California hosted a press conference announcing the new platform with President & CEO Caroline Beteta, Director of the Yurok Economic Development Corporation Raymond Bacon (left), American Indian and Alaska Native Tourism Association CEO Sherry L. Rupert and Agua Caliente Band of Cahuilla Indians Chairman Reid Milanovich.

722
MEDIA
PLACEMENTS

1.5 BILLION
IMPRESSIONS

770
BUSINESS MENTIONS
ON VISIT NATIVE
CALIFORNIA HUB

5
OUTBOUND
COLLECTIVE VIDEOS



In collaboration with native tribes, Visit California launched the Visit Native California hub on [VisitCalifornia.com](https://www.visitcalifornia.com) featuring 700-plus mentions of tribal businesses, cultural sites and events across the state as well as content that highlights Native Californians and many of California's tribes. Additionally, Visit California has partnered with the Outbound Collective to create a custom video series showcasing Native tourism experiences and Native guides in California.

To debut the initiative, Visit California held a press conference on the future site of the Agua Caliente Cultural Plaza in Palm Springs. The event included tribal leaders, California officials and tourism industry stakeholders, who experienced Native American musical performances, cuisine and examples of the tourism experiences offered to visitors throughout California. Media coverage continues to support the initiative earning near-perfect evaluation scores, based on Visit California's evaluation matrix, an achievement not seen across other media coverage. These positive scores indicate an overwhelming interest and support of the program.

COVERAGE IN CALIFORNIA

EARNED MEDIA

Placement Highlights

Visit California's global earned media efforts deliver an "always-on" approach, keeping the Golden State top of mind through media and influencer partnerships.

2,600
PLACEMENTS

NETFLIX
"Taco Chronicles"

POSTMEDIA
(Canada)

ENWOLS
(Japan)

Bally SPORTS **Discovery**
"Adventure Cities"

PBS
"Samantha Brown's
Places to Love"

Safari
(Japan)

Media Events

Media events are an important part of Visit California's earned media strategy, bringing destination partners, content creators and media from top markets together to network. Events took place within the Golden State in San Francisco and Los Angeles, as well as out of state in the Pacific Northwest and New York.

San Francisco Media Event

Partners from 37 destinations networked with over 50 top-tier Bay Area media and content creators at the Golden Gate Club at the Presidio.



TravMedia International Media Marketplace North America

Through Visit California sponsorship of the IMM Welcome Reception the 500-plus media and destinations in attendance got a taste of California. While on the East Coast, Visit California facilitated a networking brunch and a broadcast panel for California partners at Dotdash Meredith.



Pacific Northwest Media Mission

Fifteen California destinations traveled north to meet with influential travel and lifestyle media members and content creators from this valuable market.



Los Angeles Media Event

The stars shined bright at the rooftop Dolby Family Terrace with 41 destination and attraction partners and 77 top-tier media and influencers in attendance.



CREATING CALIFORNIA AMBASSADORS

Familiarization Trips

Trade familiarization and press trips provide valuable opportunities to bring key travel trade representatives, media and influencers from around the world to the Golden State to experience all that California has to offer. Trips took attendees throughout California to show off the known and unknown elements of the Golden State from culinary offerings to the wide range of accessible destinations and activities.



1,100
ROOM NIGHTS
BOOKED

110+
RENTAL CARS
BOOKED

2,200
RESTAURANTS
VISITED

2,000
MILES DRIVEN
IN RENTAL CARS

160
ADVISORS, MEDIA
AND INFLUENCERS
HOSTED

85
DESTINATIONS
VISITED

Gold Pass Program

Visit California's Gold Pass program has provided funding since 2015 to help travel industry partners collaborate and host qualified media and influencers at destinations around the state. This year 14 Gold Pass trips were approved that assisted 31 destination partners to host media.



[SCAN TO LEARN MORE](#)

ADVISOR CONNECTIONS TRAVEL TRADE

Luxury Travel

In collaboration with Visit SLO CAL and strategic partner Connections, Visit California hosted its fourth California Luxury Forum that featured a CEO Summit, media track, 700-plus appointments with global luxury buyers and two post-FAM itineraries. Forty-one global luxury buyers — with a collective spending power of \$246 million — and 11 media were immersed in California’s latest luxury product offerings within the Central Coast and beyond.

The impact of this event is significant: Connections projects a future spend of \$7.25 million in California over the next 12 months.



Visit California President & CEO Caroline Beteta, Connections Managing Director Gregory Reeves, (left), and Visit SLO CAL President & CEO Chuck Davison during the California Luxury Forum in SLO CAL.

California Luxury Forum Partners



Key Partnerships

Working closely with AFAR, Virtuoso and Signature Travel Network, Visit California was able to reach the super-affluent traveler and inspire direct bookings to our key destination partners.

Hotelbeds and Kind Traveler are key partners that get heads in beds for California hotels. A campaign with Hotelbeds in Canada, Europe, Mexico and the U.S. produced more than 288,000 room nights booked, while 66 California hotels featured on Kind Traveler give back to local destinations and charities.

hotelbeds



KindTraveler.

 VIRTUOSO

 SIGNATURE
TRAVEL NETWORK

AFAR



CALIFORNIA STAR

California's Ambassadors

The California STAR training program and resource hub is a critical component of transforming travel advisors into California ambassadors. This resource gives California partners an opportunity to reach advisors, share updated travel products and inspire trip planning domestically and globally.

With nearly 30,000 registrants, California STAR has become a main resource for agents. Advisors use this tool to learn about California, and return frequently to view collateral and content. There have been 4,200 downloads of Visit California publications this year alone.

With international travel continuing to grow, the California STAR platform reopened localized pages for additional markets that contain in-market translations and ongoing California updates.

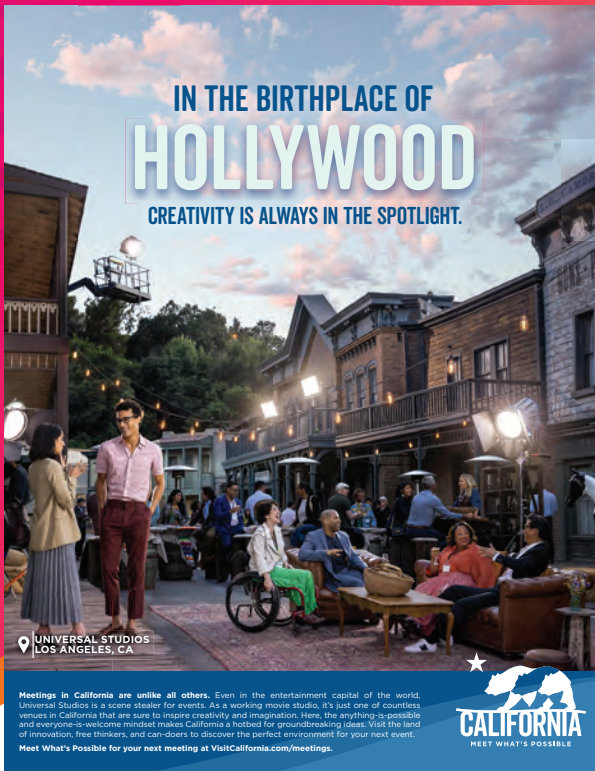


MEET WHAT'S POSSIBLE

After a successful first year, Visit California used FY22/23 to refine and strengthen the professional meetings and events program with a three-part strategy to reach planners through brand advertising, trade show and event participation and B2B education.



Visit California's outgoing Vice Chair of Marketing Joe D'Alessandro, President & CEO of San Francisco Travel, represents San Francisco at IMEX America.



Targeted Advertising

“The Birthplace” creatively showcases how California checks all the boxes in what planners are looking for in a meeting destination. This paid campaign ran in print publications and digitally with outlets most trusted by meeting planners throughout the country, helping to keep California meeting destinations top of mind. New this year was a paid campaign with Cvent, a leader within the industry generating the highest amount of RFPs for group business. A new “always-on” approach to media placements captured planners when they were ready to book, and strategic shifts in media partners led to an increase in year-over-year impressions.



Trade Show Presence

Trade shows bring an important California presence to large audiences of meeting planners. A unified California presence creates a halo effect for participating destinations, which ultimately creates greater awareness of what the Golden State has to offer. A newly launched California Engagement Zone provided Visit California and destination partners a way to connect directly with planners on the trade show floor in a lounge-style networking space.



Meeting Planner Road Shows

Visit California and 23 destination partners brought the Golden State to four key meetings markets this year. This intimate setting strips away the bustle of a trade show, putting 100% of the focus on California destinations. Partners were able to walk away with active leads and prospects from meeting planners in attendance who brought tangible business opportunities.

- ▶ Austin
- ▶ Dallas
- ▶ Denver
- ▶ Seattle

Events Attended

- ▶ Northstar's Destination California
- ▶ MME Experience
- ▶ ASAE Summit Awards
- ▶ IMEX America
- ▶ AMEX INTER[action]
- ▶ Northstar's Leadership Forum
- ▶ PCMA Convening Leaders
- ▶ PCMA Destination Showcase and Visionary Awards
- ▶ Prestige Partner Conference
- ▶ Meeting Professionals International, World Education Congress (WEC)
- ▶ PCMA EduCon



Joe Marcy from the Monterey County Convention & Visitors Bureau, sits down with a local meeting planner during the Dallas road show.

GLOBAL ACTIVITIES

Trade and Media Events

Visit California brought the Golden State to events around the world in FY22/23 to reach global trade and media.

Road to LA, IPW 2024

The largest international trade show on domestic soil returned to prepandemic attendance in San Antonio, Texas in 2023 with over 5,000 global attendees. California delegates benefited from enhanced California branding on the trade show floor and at the California Café pop-up, united at the California Caucus and stayed top of mind with a press conference for global media.

The global event returns to California in 2024 for the first time in five years, and Visit California will roll out the red carpet in partnership with Los Angeles Tourism & Convention Board, providing extra engagement opportunities for partners.

United States

- **Aug. 15-18, 2022**
Virtuoso Travel Week
- **Sept. 19-22, 2022**
ILTM North America
- **Oct. 24-26, 2022**
California Luxury Forum
- **Nov. 8-10, 2022**
Signature Travel
Network Conference
- **Feb. 12-15, 2023**
IITA Summit
- **Feb. 27-March 2, 2023**
Go West Summit
- **May 21-24, 2023**
IPW San Antonio

Canada

- **Nov. 29, 2022**
"Keeping Up With The
Canadians" Launch Event
- **April 24-27, 2023**
Canada Sales &
Media Retreat

Mexico

- **Nov. 21, 2022**
Mexico City, 49ers NFL game
- **Jan. 25-27, 2023**
Mexico Trade Retreat
- **April 26-27, 2023**
Mexico City, Giants vs. Padres MLB series



MEXICO HIGHLIGHT

Professional Sports Partnerships Cross Borders

Sporting events crossed the border and provided an opportunity to spotlight California. Two historic sporting events took place in Mexico, a San Francisco Giants vs. San Diego Padres series and an inaugural Monday Night Football faceoff between the San Francisco 49ers and the Arizona Cardinals. In partnership with San Francisco Travel and San Diego Tourism Authority, these events offered the chance to host key influencers, media, meeting professionals and trade executives during the games and for pre-game promotional events.



Julie Coker, Visit California Vice Chair of Marketing and President & CEO of San Diego Tourism Authority, participates in the Taste of California event during the Japan CEO Mission.

France

- **Sept. 20-22, 2022**
IFTM Top Resa
- **Dec. 6, 2022**
ILTM Cannes
- **June 22-23, 2023**
Europe CEO Mission

Germany

- **Sept. 26-29, 2022**
Brand USA Travel Week

U.K.

- **Nov. 29-Dec. 1, 2022**
United Kingdom Trade & Media Retreat
- **June 19-21, 2023**
Europe CEO Mission



Japan

- **Sept. 22-24, 2022**
JATA
- **March 11-15, 2023**
Japan CEO Mission

Middle East

- **Oct. 11-12, 2022**
Aviareps Middle East Travel Caravan

CANADA HIGHLIGHT

‘Keeping Up With the Canadians’

Visit California launched a new creative platform to welcome Canadians back to California. The digital and social content series profiled notable Canadians living in California, turning them into “travel guides” as they shared how to experience California like a local – but through a uniquely Canadian lens. The kickoff event brought the Golden State sunshine to Toronto with 75 media and trade participants garnering over 100 pieces of social content to amplify the campaign.



Visit California President & CEO Caroline Beteta discusses tourism and place making with Sacramento Kings owner Vivek Ranadivé.

UNIFYING THE INDUSTRY

Outlook Forum 2023

More than 800 tourism industry members attended Outlook Forum 2023 in California's "Farm-to-Fork Capitol," Sacramento. Over three days, 63 speakers across 21 sessions addressed pressing issues in tourism and California. Sessions touched on topics such as accessibility, trends in digital marketing, the new Visit Native California program, plus a discussion with Sacramento Kings owner Vivek Ranadivé on the impact of the NBA team's new arena in the heart of a downtown city center. Visit California President and CEO Caroline Beteta discussed key international updates with Visit California's in-market managing directors and sat down with Lt. Gov. Eleni Kounalakis to address joint initiatives and the importance of international travel for California.

Visit California Associate Vice President of Global Marketing Leona Reed networks with Visit California Managing Director of India Sheema Vohra.



SCAN TO REGISTER FOR
OUTLOOK FORUM 2024



Managing Directors of Visit California's key international markets discuss current market conditions and the return of international travel.



Lt. Gov. Eleni Kounalakis discusses the synergy between the governor's office and Visit California and the importance of travel to California.

REACHING LEGISLATIVE LEADERS

Legislative Unity Dinner

To take advantage of Outlook Forum’s location and proximity to the State Capitol, Visit California organized a legislative unity dinner pairing DMO CEOs and tourism leaders with legislators representing regions throughout California. This format allowed for open discussion and networking to emphasize the importance of tourism and the essential role it plays as an economic driver.

Assembly Members	
Dawn Addis	AD 30 – San Luis Obispo, Monterey, Santa Cruz
Tom Lackey	AD 34 – Los Angeles, San Bernardino, Kern
Gregg Hart	AD 37 – Santa Barbara, San Luis Obispo
Sharon Quirk-Silva	AD 67 – Orange, Los Angeles
Kate Sanchez	AD 71 – Riverside, Orange
Tasha Boerner Horvath	AD 77 – San Diego
Jim Patterson	AD 8 – Central Valley, Eastern Sierra
Senators	
John Laird	SD 17 – Santa Cruz, Monterey, San Luis Obispo
Ben Allen	SD 24 – Los Angeles
Marie Alvarado-Gil	SD 4 – Central Valley, Eastern Sierra
Brian Jones	SD 40 – San Diego, Imperial



To kick off California Tourism Month in May, Visit California held a press conference at LAX to debut the 2022 tourism economic impact report and provide an update on tourism’s recovery. Visit California President and CEO Caroline Beteta was joined by Los Angeles Tourism and Convention Board President and CEO Adam Burke, city officials and representatives from Los Angeles International Airport.

To support key messaging, an industry toolkit was released to help tourism businesses and destination partners spread the word to residents and local leaders about the importance of travel and tourism to California.



40
MEDIA PLACEMENTS

465,000
IMPRESSIONS

120
EMAILS SENT
TO LEGISLATORS

President & CEO of Los Angeles Tourism and Convention Board, Adam Burke, discusses tourism’s recovery during a press conference for California Tourism Month held at Los Angeles International Airport.

AIDING DESTINATIONS GRANT PROGRAMS

Rural Marketing Program

California's eight rural regions play a vital role in the Golden State's tourism ecosystem. Each region brings together multiple destinations to create dedicated regional marketing that extends the reach of each individual destination. Visit California's support helps increase awareness and reach consumers through tourism marketing grants offering one-to-one matching and dedicated funds to participate in the Leveraged Media Co-op program. Additionally, a Google Ads retargeting program timed with Visit California's spring marketing efforts increased the reach of rural region digital ads, reaching consumers visiting Visit California's website.



\$680,000
INVESTMENT

Economic Development Association Subgrant

As part of the \$46 million in COVID-19 relief funding designated for California by the EDA, Visit California identified \$20 million to go to communities most negatively impacted by the pandemic. Eligibility was determined by calculating proportional losses in visitor spending during 2019-2021 in California's counties to generate a "spend/economic loss score." Based on quantitative metrics, California's four gateway counties—Los Angeles, Orange County, San Diego and San Francisco—bore the brunt of the pandemic-caused downturn, making them eligible for subgrants.

- ▶ **Los Angeles:** \$8.8 Million
- ▶ **Orange County:** \$3.5 Million
- ▶ **San Diego:** \$2.8 Million
- ▶ **San Francisco:** \$5.2 Million

CALIFORNIA WELCOME CENTERS

California Welcome Centers remain Visit California’s personal touch point for travelers. Each center is staffed with tourism specialists who listen to travelers’ interests and desired experiences and craft tailored recommendations. This year two regions were awarded new welcome centers — Ukiah in the North Coast and Modesto in the Central Valley. The addition of these two centers provides full coverage throughout all 12 California tourism regions.

1.5 MILLION
ANNUAL VISITORS

Community Networking

Visit California continued hosting California Welcome Center open house events this year to better integrate the local tourism community with their welcome center. These events combine networking and education components to create additional synergy within the region.



Visit California Corporate Counsel Scott Plamondon and Visit California Chief Operating Officer Matt Sabbatini network at a California Welcome Center Open House event.



CELEBRITY PARTNERSHIPS



Jessica Alba

A Pomona native, the actress and owner of the Honest Company graced the cover of the official 2023 “California Visitor’s Guide.” Inside she talks about growing up in California enjoying authentic farm-to-table Mexican fare, running a company while being a mom and her love of California beaches.



Anthony Anderson

A Compton native, Anderson is best known for his lead role in the television sitcom “Black-ish” and as a regular celebrity judge on “Iron Chef.” He appeared in the celebrity roundup in the 2023 “California Road Trips” guide and was featured in the Visit California ad “Am I Dreaming?”



Blake Anderson

One of the co-creators and stars of the popular Comedy Central show “Workaholics,” the Sacramento native was a guest on the Visit California podcast where he spilled his favorite places to eat and drink in southern California and the San Francisco Bay Area.



Margaret Cho

The stand-up comedian is part of the celebrity roundup in the 2023 “California Road Trips” guide expressing her love of the drive from Los Angeles to her hometown San Francisco, where she enjoys strolling upper Haight Street.



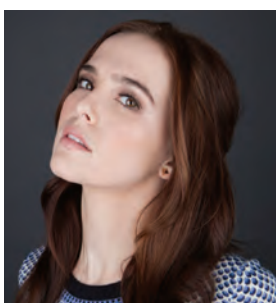
Francis Ford Coppola

The five-time Academy Award-winning director appears in the 2023 “California Road Trips” guide, where he discusses his perfect road trip—driving from his Napa winery winding his way over to Sonoma county.



Brandon Crawford

The San Francisco Giants’ shortstop and San Francisco Bay Area native appeared in the Visit California ad “Am I Dreaming?” as a larger than life version of himself soaring over the Golden Gate Bridge.



Zoey Deutch

The L.A.-based actress, daughter of director Howard Deutch and actress Lea Thompson, appears in the 2023 “California Road Trips” guide avowing her love of the Madonna Inn, Big Sur and Joshua Tree National Park.



Tony Hawk

Tony Hawk is a professional skateboarder, burgeoning restaurateur and owner of the skateboard company Birdhouse. Born in Carlsbad, Hawk was featured on the Visit California podcast talking all things San Diego.



Craig Kilborn

The former host of “The Late Late Show” and “The Daily Show,” is a twofer, appearing on the podcast to share his laid-back California lifestyle, a topic he explores on his own podcast, The Life Gorgeous. He also appears in the 2023 “California Road Trips” guide.



Mario Lopez

The Chula Vista-born host of TV entertainment shows “Extra” and “Access Hollywood,” appeared in the “Am I Dreaming?” ad cruising down a California coastal highway in a red convertible.



Cheech Marin

One half of the famed Cheech and Chong comedy duo, the South Los Angeles-born actor appears in the 2023 “California Road Trips” guide discussing his love of the Golden State’s deserts.



Jet Tila

The chef/owner of The Charleston and Pakpao Thai restaurants in L.A., is included in the 2023 “California Road Trips” guide. He loves driving up to quaint Yountville in Napa Valley to load up on Model Bakery English muffins, go wine tasting and more.



Dwyane Wade

The three-time NBA champion graces the cover of the 2023 “California Road Trips” guide, in which he discusses his love of his Ford Bronco, his Napa Valley vineyard, and his wife, actress Gabrielle Union and their five kids.



Matt Walsh

One of the founders of The Upright Citizens Brigade skit comedy troupe and “Veep” series regular, Walsh loves to drive to the Santa Barbara coast with his wife and three kids for some weekend glamping. He recounts his favorites in the 2023 “California Road Trips” guide.



Alice Waters

The chef and owner of famed Chez Panisse in Berkeley and the godmother of modern California cuisine, Waters discussed, in a California Questionnaire, how much she enjoys driving the back roads of Marin searching the rolling hills for the perfect picnic spot.



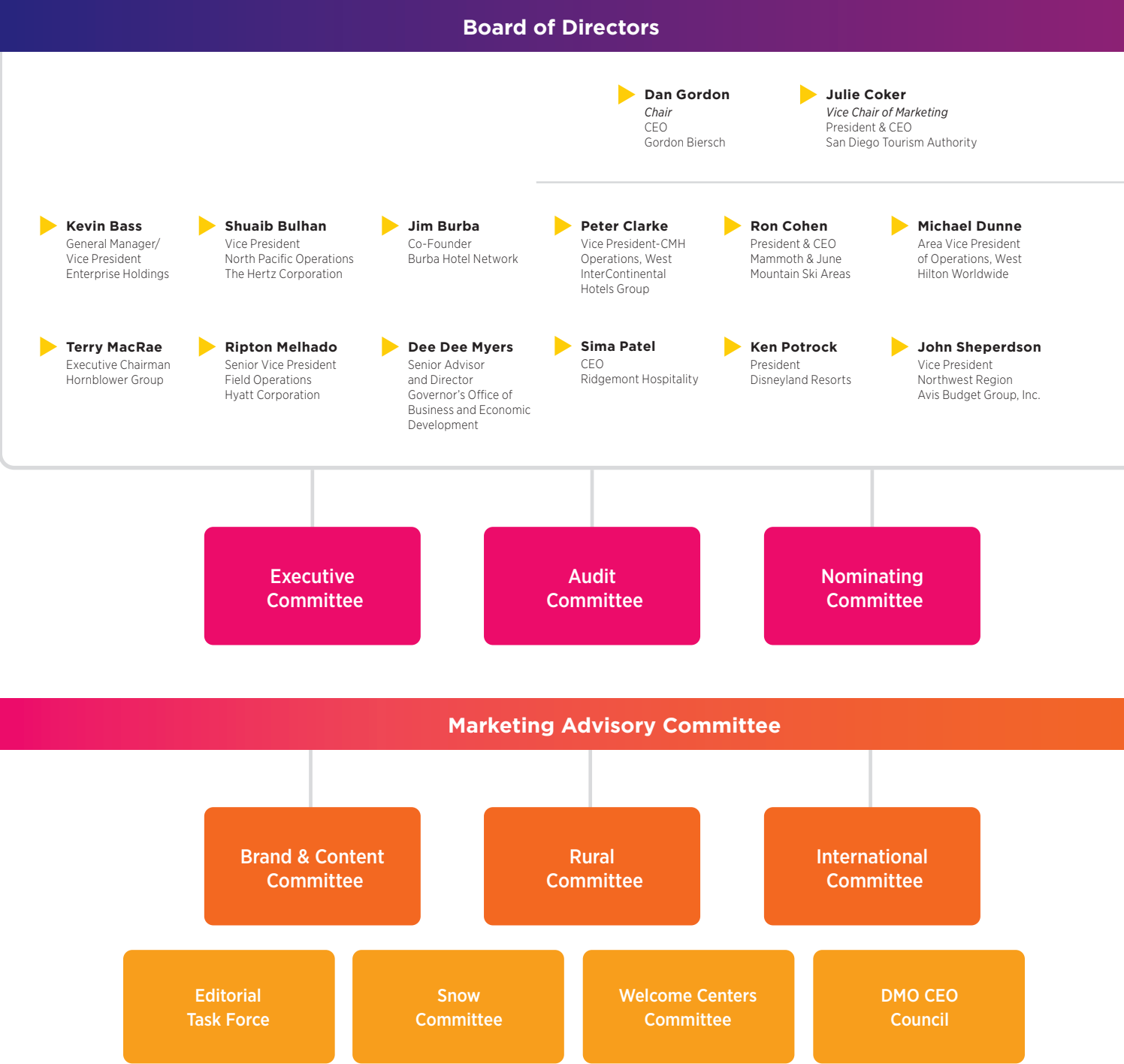
Brooke Williamson

The L.A. celebrity chef appeared recently on the Visit California podcast giving a tour of her Playa del Rey restaurant Playa Provisions and talking all things southern California.

BOARD ROSTER

Visit California is guided by an industry-led board of directors, industry committees and task forces that represent every segment and region of California’s tourism industry.

(As of July 2023)



Board of Directors

▶ **Carla Murray**
Vice Chair of Operations
 President, U.S. Western
 Region, Full Service MxM
 Marriott International

▶ **Kevin Fat**
Chief Fiscal Officer
 CEO
 Fat Family Restaurant Group

▶ **Joe D'Alessandro**
 President & CEO
 San Francisco Travel

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

▶ **Reed Kandalaft**
 Regional Vice President
 and General Manager
 Four Seasons Hotels &
 Resorts/Beverly Hills

▶ **John Kelliher**
 Founder
 Grapeline Wine Tours

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

▶ **William Loughran**
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 Evolution Hospitality

▶ **Bobbie Singh-Allen**
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 President & CEO
 Visit Greater
 Palm Springs

Personnel
 Committee

Governance
 Committee

Marketing Advisory Committee

Research & ROI
 Committee

Public Relations
 Committee

Crisis
 Task Force

Luxury Forum
 Steering Committee

Meetings & Events
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Outlook Forum
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Visit California produces an interactive version of this annual report.

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