

Calaveras Visitors Bureau

Bryce McAnally
Interim Director of Consumer Marketing
Visit California

November 4, 2015





**OUR MISSION:
CREATE DESIRE FOR THE
CALIFORNIA EXPERIENCE**



THE TOURISM ECOSYSTEM

Shopping
Restaurants
Attractions

DREAM BIG BUDGET CONTRIBUTIONS

CAR RENTAL

58%

ACCOMMODATIONS

33%

2%

ATTRACTIONS

2%

TRAVEL

RESTAURANTS
& RETAIL

5%

Commission leadership

avis budget group

enterprise

FOX
RENT A CAR

PURE LUXURY
TRANSPORTATION

SAN DIEGO 200

UNIVERSAL STUDIOS
HOLLYWOOD
50th ANNIVERSARY

CityPASS

Hertz



Wolfgang Puck



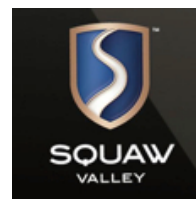
FAT'S[®]
FAMILY OF RESTAURANTS
FINE ASIAN & AMERICAN DINING



RODNEY STRONG
Vineyards



PEBBLE BEACH
COMPANY



Fairmont
HOTELS & RESORTS



Mammoth



Martin Resorts

Montage

Marriott

RH
RIDGEMONT
HOSPITALITY

Tourism's economic impact

2014

**\$117.5
billion**

in annual travel-related consumer spending



Brand advertising effectiveness

Marketing ROI

Every **\$1** spent on programs
returns **\$327** to the industry

Source: Tourism Economics, Dean Runyan Associates



Brand advertising effectiveness **Economic impact**

\$8.5 billion

in incremental spending

Source: Tourism Economics, Dean Runyan Associates



Brand advertising effectiveness

Awareness reach

63million

aware target households

Source: Tourism Economics, Dean Runyan Associates

Brand advertising effectiveness

Incremental trips

4.3 million

generated in 2014

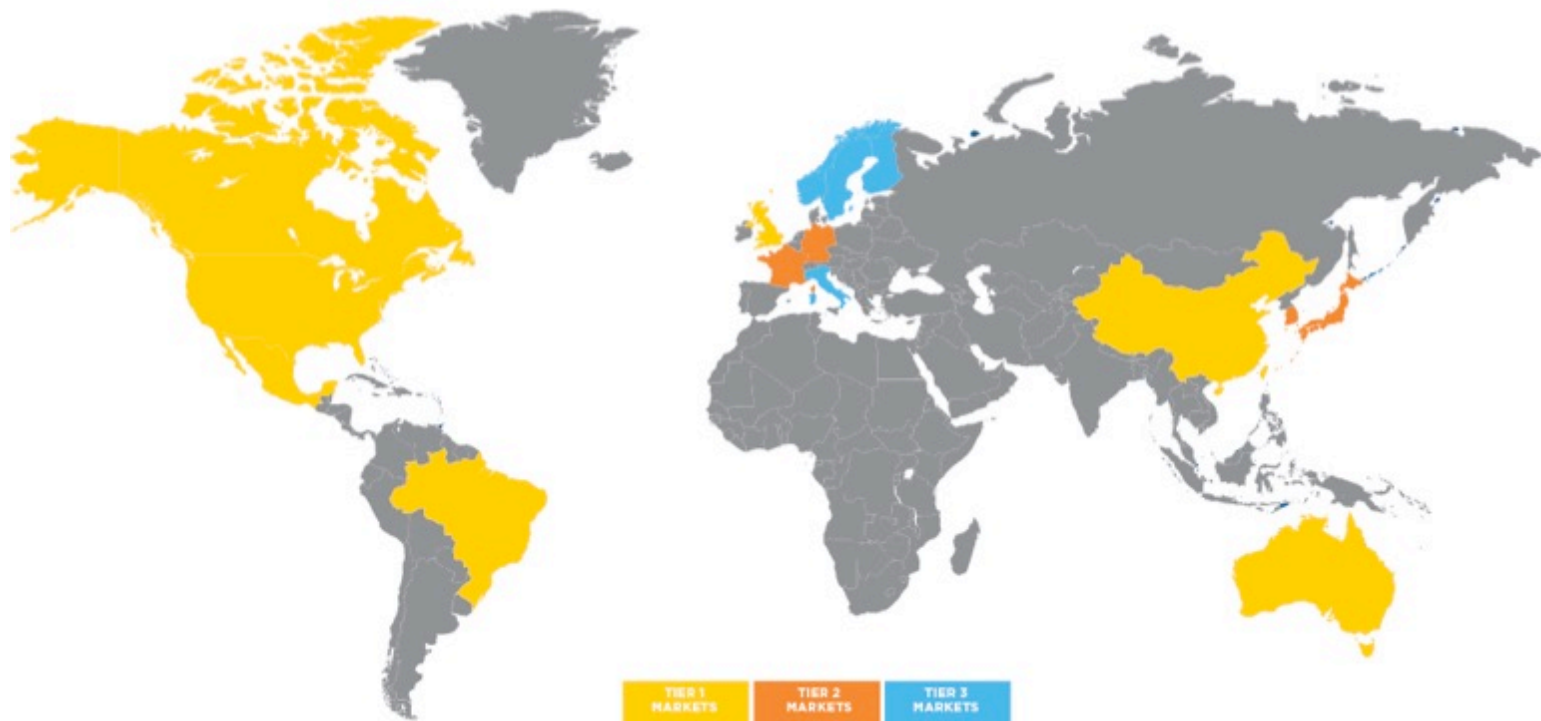
Source: Tourism Economics, Dean Runyan Associates



16.5 MILLION
2014 INTERNATIONAL VISITORS SPENT
\$23.3 BILLION



Visit California's global reach



VISIT CALIFORNIA MARKETING AUDIENCE PILLARS

VISIT CALIFORNIA MARKETING

Consumer

- Brand Advertising
- Digital: Website, Email, Mobile, Social
- Printed Publications
- Co-op

Press

- Media Pitches
- Media Events
- Press Trips
- Industry Initiatives

Travel Trade

- Sales Mission/ Trade Shows
- Familiarization & Educational Trips
- Online Training & Content Distribution

Crisis Communications

- Task Force
- Wildfires
- El Nino
- Drought (Snow campaign as a strategic response)



Strategic Framework

Target Audiences

Global Brand Target

Adults 18+, Top 33% HHI, Travel Passion

Family Opportunity Target

Kids in HH

Super Affluent Opportunity Target

\$250K HHI

Passions-Based Targets

Outdoor, Culinary, Entertainment, Culture

Global Target Audience



UNITED STATES

CONFIDENT MEDIA MAVENS

- Median Age: 47
- Most immersed in media, which supports all aspects of life from utility to interests
- Self-expression is key
- Influencers and content creators

TOTAL POPULATION 18+
212 MILLION

TARGET AUDIENCE
52 MILLION

% OF TOTAL
POPULATION

25%



CANADA

INFORMATION AND SPORTS JUNKIES

- Median Age: 46
- Light on social networking - big on interaction
- Gain fulfillment by experiencing and disconnecting

TOTAL POPULATION 18+
23 MILLION

TARGET AUDIENCE
2.8 MILLION

% OF TOTAL
POPULATION

12%



UNITED KINGDOM

PRACTICAL MEDIA USERS

- Median Age: 44
- Primarily use media to inform/manage life
- Spectators and shoppers
- Media is a means to an end - a support to their active offline lives

TOTAL POPULATION 18+
44 MILLION

TARGET AUDIENCE
4.4 MILLION

% OF TOTAL
POPULATION

10%



CHINA

MEDIA FLEXIBLES

- Median Age: 34
- Comfortable consuming a variety of content for all purposes
- Television and digital have the highest frequency of usage

TOTAL POPULATION 18+
252 MILLION

TARGET AUDIENCE
2.8 MILLION

% OF TOTAL
POPULATION

1%



AUSTRALIA

CONTENT ABSORBERS & CREATORS

- Median Age: 37
- Most active online - heavy consumers of online video as well as content creators
- Mobile is a means to share their life, in the moment, with their connections

TOTAL POPULATION 18+
16 MILLION

TARGET AUDIENCE
1.3 MILLION

% OF TOTAL
POPULATION

8%



BRAZIL

INFORMED CONNECTORS

- Median Age: 41
- Heavy involvement in social networks
- Higher propensity towards heavy media consumption

TOTAL POPULATION 18+
134 MILLION

TARGET AUDIENCE
19 MILLION

% OF TOTAL
POPULATION

14%



MEXICO

ABRIDGED MEDIA USERS

- Median Age: 39
- Media as an escape
- Television is big, digital is still developing

TOTAL POPULATION 18+
65 MILLION

TARGET AUDIENCE
10 MILLION

% OF TOTAL
POPULATION

15%



*California is the land of
boundless opportunity, a place
where you don't just dream,
you **dream big***

California
dream
big

Brand Refresh 'Average Joes'

California
dream
big



Family Refresh 'Kids Unplugged'



California
dream
big

Brand campaign components

TV/OTV Commercials



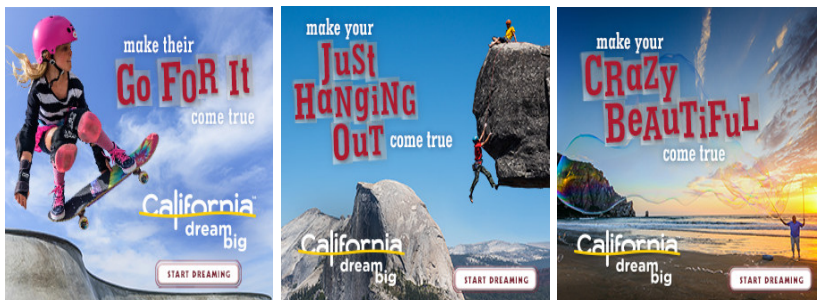
"Average Joes"

"Kids Unplugged"

Digital Video Content



Foundational Digital



New Multi-Channel Initiatives

- **Super Affluent** – "California Laid Back Luxury"
- **Family** – "Ultimate Family Playground"
- **Outdoor** – "Catch the Winter Wave"





Culinary



Family



Outdoor



Luxury



Entertainment

Culinary as a Trip Driver

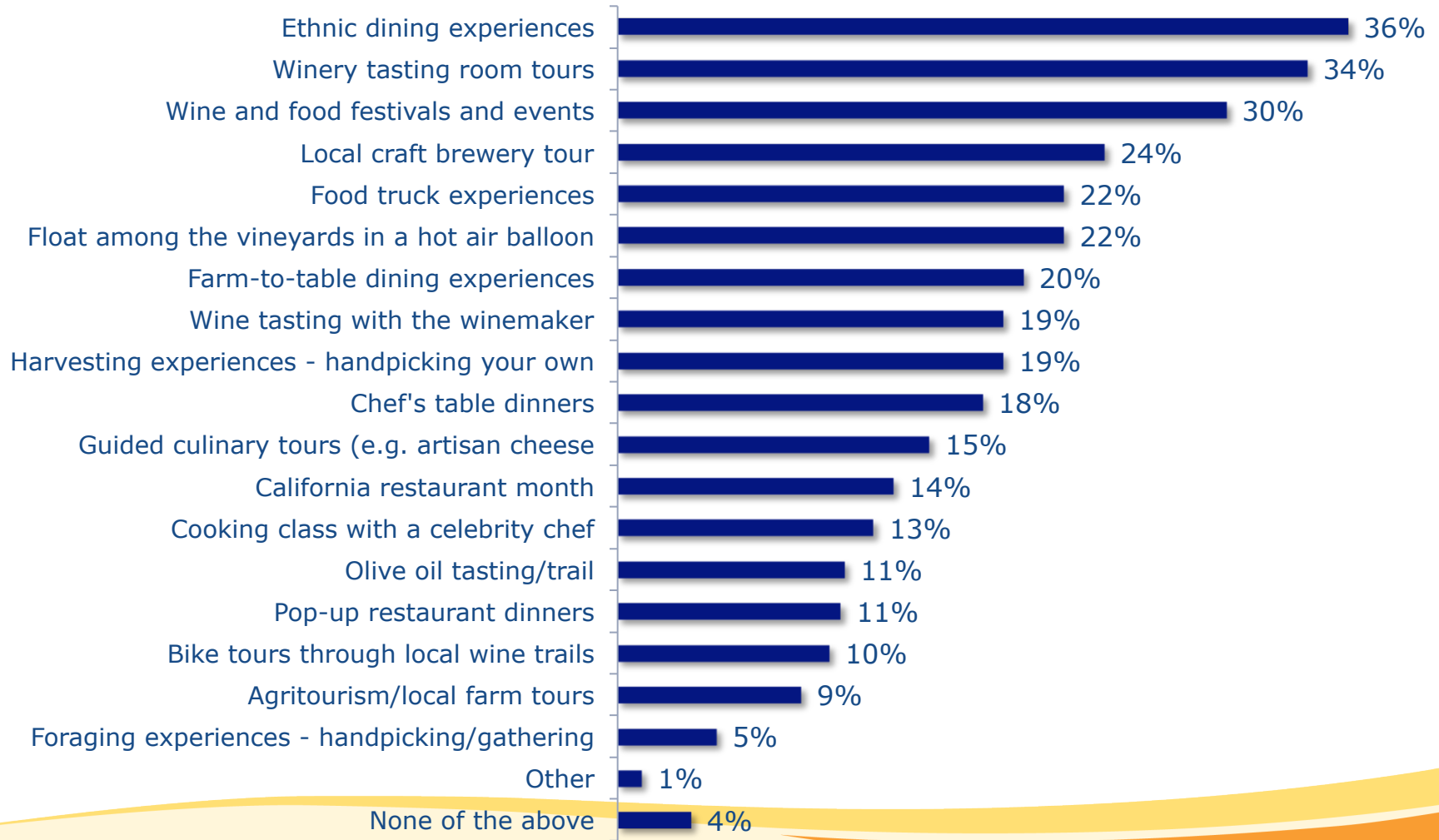
\$30.1 billion - Total visitor spending on Food & Wine in 2014

15% of domestic visitors to CA in 2014 included Fine Dining as part of their activities.

77% of all leisure travelers can be classified as Culinary travelers



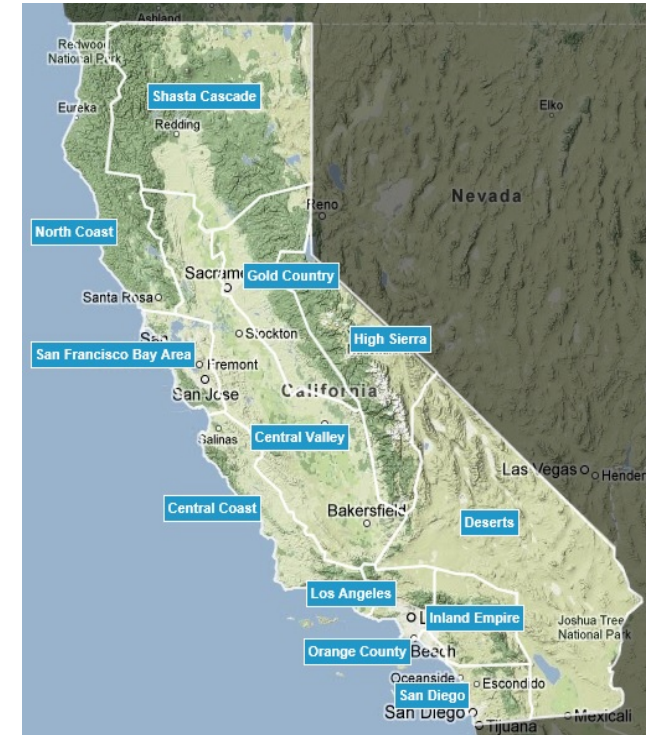
Most Appealing Culinary Experiences in California



Source: Mandala Research

Where the Culinary Activities Can Be Found in California

Regions in California	Wineries	Micro-Breweries	Farm-to-Table Food	Farm Tours	None
North Coast	49%	26%	28%	21%	26%
Central Valley	45%	26%	44%	37%	23%
San Francisco Bay Area	41%	53%	31%	13%	21%
Central Coast	38%	31%	30%	21%	30%
Shasta Cascade	37%	21%	34%	30%	30%
Gold Country	34%	22%	37%	27%	30%
San Diego	28%	45%	31%	16%	30%
Orange County	26%	37%	27%	14%	36%
Los Angeles	22%	44%	26%	10%	35%
Inland Empire	22%	24%	29%	23%	40%
High Sierra	22%	21%	24%	22%	44%
Deserts	8%	13%	10%	8%	70%



Targeting the deliberate culinary traveler

Culinary travelers can be divided into three segments based on the role culinary activities played in motivating their trips

Deliberates: those took one or more trips where the availability of culinary activities was a key reason they took a trip or where the availability of culinary activities helped them choose between potential destinations (30% of all Culinary travelers).

Opportunistics: Those who took one or more trips where they sought out culinary activities, but who say those activities were not a factor in choosing between destinations (26% of all Culinary travelers).

Accidentals: Those who took one or more trips where they participated in culinary activities simply because they were available (19% of all Culinary travelers).potential destinations.

the Savvy Sophisticate

WHAT MATTERS?



I believe in balance.



I indulge to impress.



I seek the best in life.

WHAT MOTIVATES?



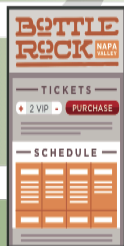
I keep up appearances.



I'm more than a foodie.



I'm the master of my life.



IF I'M
NOT LIVING
WELL,
I'M NOT REALLY
LIVING.

CULINARY PERSONA

PERSONAL MOTTO

MEDIA CONNECTIONS



SOCIAL NETWORKS



Culinary Integration

make your
SiP & SaVOR
come true
California
I dream big

START DREAMING



California
RESTAURANT
MONTH





In partnership with Department of Food & Agriculture, Buy California Marketing Agreement and Visit California awarded \$1 million to promote California's bounty



When it comes to
culinary experiences,
from farm tours, farmers
markets and farm-to-fork
dinners, to food and wine
festivals and wine tasting
tours, **California is
always in season**



CALIFORNIA

always in season

PART 5: Exploring Monterey, with farmer Troy Boutonnet of Ocean Mist Farms **and** artichoke devotee Chef Tony Baker of Montrio Bistro

▶ watch the accompanying video at foodandwine.com/california

easy access to lush, local produce, the city is a haven for the state's restaurateurs like chef Tony Baker of Montrio Bistro. Chefs in Monterey create dishes that are jam-packed with Golden State flavors, made possible by California farmers who annually turn out more than 400 crops of fruits, vegetables and nuts.

"So many great ingredients are grown at our doorstep," says Tony. Many of his favorites come from fourth-generation farmer Troy Boutonnet of Ocean Mist Farms, whose crops thrive in the Mediterranean climate of the Salinas Valley, just a few miles inland from the Monterey Coast. Bright, sunny afternoons that cool as the evening fog rolls in are ideal



for growing artichokes, the farm's signature crop. The abundance of local produce and a constant supply of fresh seafood from the bay are a boost to Monterey's burgeoning culinary scene—which, along with the world-renowned Monterey Bay Aquarium, beachside hotels and the Big Sur coastline, make Monterey Bay a vibrant,



California, Always in Season

- \$1 million partnership with CA GROWN
- Media buy with Time Inc.
 - 6 Print spreads in *Food & Wine*
 - 2 Print spreads in *Sunset*
 - 6 Video vignettes
 - Robust digital activation
 - Event activations at Celebration Weekend & Savor the Central Coast

Current Print Spreads/Episodes

FARMER	CHEF & RESTAURANT	REGION
2013/14		
Santa Barbara Farmers' Market	Brandon Hughes of Wine Cask	Central Coast (Santa Barbara)
Paul Muller of Full Belly Farm	Michael Tusk of Quince	San Francisco Bay Area (San Francisco)
Mike Sanders & Chris Ambuul of Rancho Santo Tomas	Trey Foshee of George's at the Cove	San Diego (San Diego)
Troy Boutonnet of Ocean Mist Farms	Tony Baker of Montrieo Bistro	Central Coast (Salinas/Monterey)
Berton Bertagna of Bertagna Orchards & Son Kissed Vineyard	Leigh Ann Byerly of Farwood Bar & Grill	Central Valley (Chico)
Kevin Herman of The Specialty Crop Company	Chris Mariscotti of The Vineyard Restaurant & Bar	Central Valley (Fresno)
2014/15		
Jeff Colombini of Colombini Farms	Evan & Sarah Rich of Rich Table	Central Valley (Stockton) & San Francisco Bay Area (San Francisco)
Joe Turkovich of Joe Turkovich Farms & Nick Micheli of Micheli Enterprises Inc.	Evan & Sarah Rich of Rich Table	Central Valley (Live Oak & Yuba City) & San Francisco Bay Area (San Francisco)
Karl & Christine Wente	The Restaurant at Wente Vineyards	San Francisco Bay Area (Livermore)

New Episodes



**Wowona
Peaches & 559
Local Brewery,
Central Valley
(Clovis)**



**Enzo Olive Oli &
Animal
Restaurant,
Central Valley
(Fresno) & Los
Angeles (LA)**



**Houweling's
Tomatoes & Animal
Restaurant, Central
Coast (Camarillo) &
Los Angeles (LA)**

ADVERTISING IMPACT

	No recall	Recall	Delta
Image of California			
Wineries	4.4	4.7	.3
Fine dining	4.0	4.6	.6
California-grown crops (e.g., almonds, grapes)	3.9	4.4	.5
Local cuisine	3.7	4.5	.8
Farmers markets	3.3	4.1	.8
Breweries	2.9	3.8	.9
Farm tours	2.7	3.9	1.2



California

DREAM
EATER

Dream Eater pilot episodes



Bacon & Butter
Biscuit sandwich



Frank Fat's
Banana crême pie



Magpie
Pork belly



Kru
Sashimi tapas



Crowd-sourcing approach

Region → City

Restaurant → Dish



Crowdsourcing results



Donut Bar
Galaxy Taco
Whisknadle



Sandy's
Sancho's
SeaLegs
Wine Bar



The Attic
Egg Slut
Guisados



Northern California

Consumer Submissions:

- January, 2016

Shooting Window:

- March, 2016





californiadrea...

FOLLOWING

218 likes

5h

californiadreamer I've been to Sacramento, San Diego, Huntington Beach, Long Beach, and Los Angeles. Now I'm off to Central California and I need you to tell me where to go! Cities, restaurants, dishes! You name it, I want to know about it! #DreamEats

[view all 42 comments](#)

californiadreamer @dailyflourish Valley or coast!!

805foodie In Ojai, check out the cool pop-up (and regular) events/ menus at @tippleandramble and @nocciolaojai , the Chief's Peak bar at @sheltersocialclub 's Ojai Rancho Inn, the vegan fare at @hvojai and @veganmario , the combination organic market / cafe / bakery @farmerandthecook and the top-notch tasting room of @theojaivineyard , located in a former firehouse. Fight, with all your might, the urge to use such "travel writer



Add a comment...

...



surfcityusa

FOLLOW

1,027 likes

10w

surfcityusa We all know there are plenty of great dining spots around [#HuntingtonBeach](#)! [@CaliforniaDreamEater](#) is headed to Southern California and there's no doubt he needs to stop in [#SurfCityUSA](#)! Help by visiting his profile and commenting on his posts with your favorite HB eateries and menu items. You can also post your own foodie photos and use [#DreamEats](#) and tag [@CaliforniaDreamEater](#). A few of our favorites include [@sandyshb](#) [@sealegswinebar](#) and [@redtableinstagram](#). Do you agree?

kal_dude [#714life](#)

californiadreameater I've gotten a lot of surf city love already! Keep telling me where I should go!

surfcityusa [@californiadreameater](#) you got it 👍 the list is endless! We'd love to have you in [#SurfCityUSA](#) 🌊🌴



Add a comment...

...



Industry Website
The marketing resource for
California travel professionals.



[SIGN OUT](#) [MY ACCOUNT](#)

[GROW YOUR
BUSINESS](#)

[RESEARCH](#)

[MARKET
STRATEGY](#)

[WHY TRAVEL
MATTERS](#)

[PUBLICATIONS](#)

[IMAGES &
VIDEO](#)

[TRAVEL
INDUSTRY](#)

[ABOUT VISIT
CALIFORNIA](#)

[Home](#) > [Market Strategy](#) > [California Dream Eater](#)

California Dream Eater



What is California Dream Eater?

A new 'eatertainment' series featuring Chase Ramsey, the California Dream Eater, who proudly, passionately and hilariously eats the best things in California on behalf of foodies everywhere.

@CaliforniaDreamEater

Instagram is the primary channel for Dream Eater, but you can follow him on any of the platforms below.



How Can You Be Involved?

Community Insights



Amazing content and pics from the industry are being shared in our new Community. You there?

[Visit Today](#)

Get Free Publicity

Put your content in front of more than 5 million visitors a year on [VisitCalifornia.com](#).

WORKING WITH VISIT CALIFORNIA





Industry Website

The marketing resource for
California travel professionals.

[SIGN OUT](#)[MY ACCOUNT](#)[GROW YOUR
BUSINESS](#)[RESEARCH](#)[MARKET
STRATEGY](#)[WHY TRAVEL
MATTERS](#)[PUBLICATIONS](#)[IMAGES &
VIDEO](#)[TRAVEL
INDUSTRY](#)[ABOUT VISIT
CALIFORNIA](#)

Dream Big Dividend Results

California's travel & tourism industry makes a BIG decision ▶

Information Regarding Meetings of the California Travel and Tourism Commission ▶

Industry.VisitCalifornia.com

Find:

Co-opportunities | Research

VCA Marketing Plans | Images & Video

Thank you!

visit
California

