

“Calling All Californians”

COVID-19 California Jobs Recovery Initiative

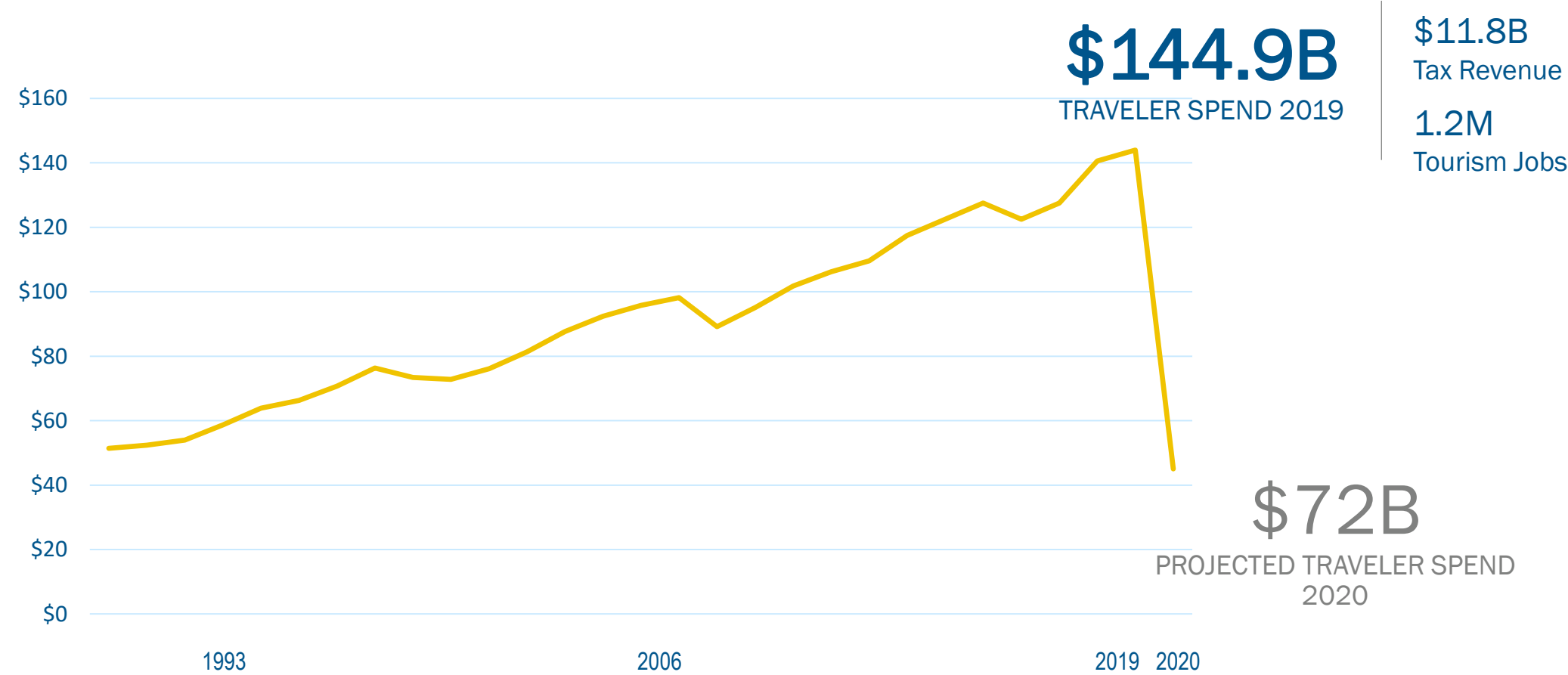
\$45 Million One-Time Appropriation

April 29, 2020



COVID-19 Impact to California Tourism

California Tourism's Record Growth Ends



Source: Dean Runyan, Oxford Economics

California Travel Projected Losses

Total Visitor Spending Loss

\$72 BILLION

(2020)

Resulting Tax Revenue Loss

\$6.1 BILLION

(2020)

By the end of MAY:

Visitor Spending Loss

\$24.7 BILLION

Employment Loss

613,000

(direct travel jobs)

Unemployment benefits for these workers will cost the state

\$830 MILLION

Every month

Source: Oxford Economics

Economic fallout is more than **9x** the impact of 9/11

Local Impacts

San Francisco

- Hotel occupancy down **78%**

Anaheim

- **30%** of hotels are closed indefinitely

Los Angeles

- Hotel occupancy down **74%**

Yosemite

- Tourism accounts for **50%** of the county's workforce

Sonoma

- The City is facing a **multimillion-dollar** deficit



COVID-19 Jobs Recovery Marketing Plan

Executive Summary

Projected Economic Impact

\$10.3B

Incremental Visitor
Spending to Businesses

168,000

Jobs Created

Visit California is a nonprofit 501(c)6 organization that serves a key economic development role for California through growing the statewide tourism economy comprised of hotels, attractions, restaurants, retailers and transportation service businesses.

This proposal is for a one-time \$45 million stimulus grant to quick start the recovery of the California tourism economy and put Californians back to work. The funding would be matched by both the media broadcasters as well as other travel industry marketing efforts to leverage the overall media investment.

Marketing Plan

Table of Contents

1. Objective and Strategy
2. Timeline
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 - b. Wave 2: Western Region “California Is Calling”
 - c. Wave 3: National “All Dreams Always Welcome”
5. Advertising Measurement & Economic Impact

COVID-19 Jobs Recovery Marketing Plan

OBJECTIVE:

Stimulate the California economy through visitor spending.

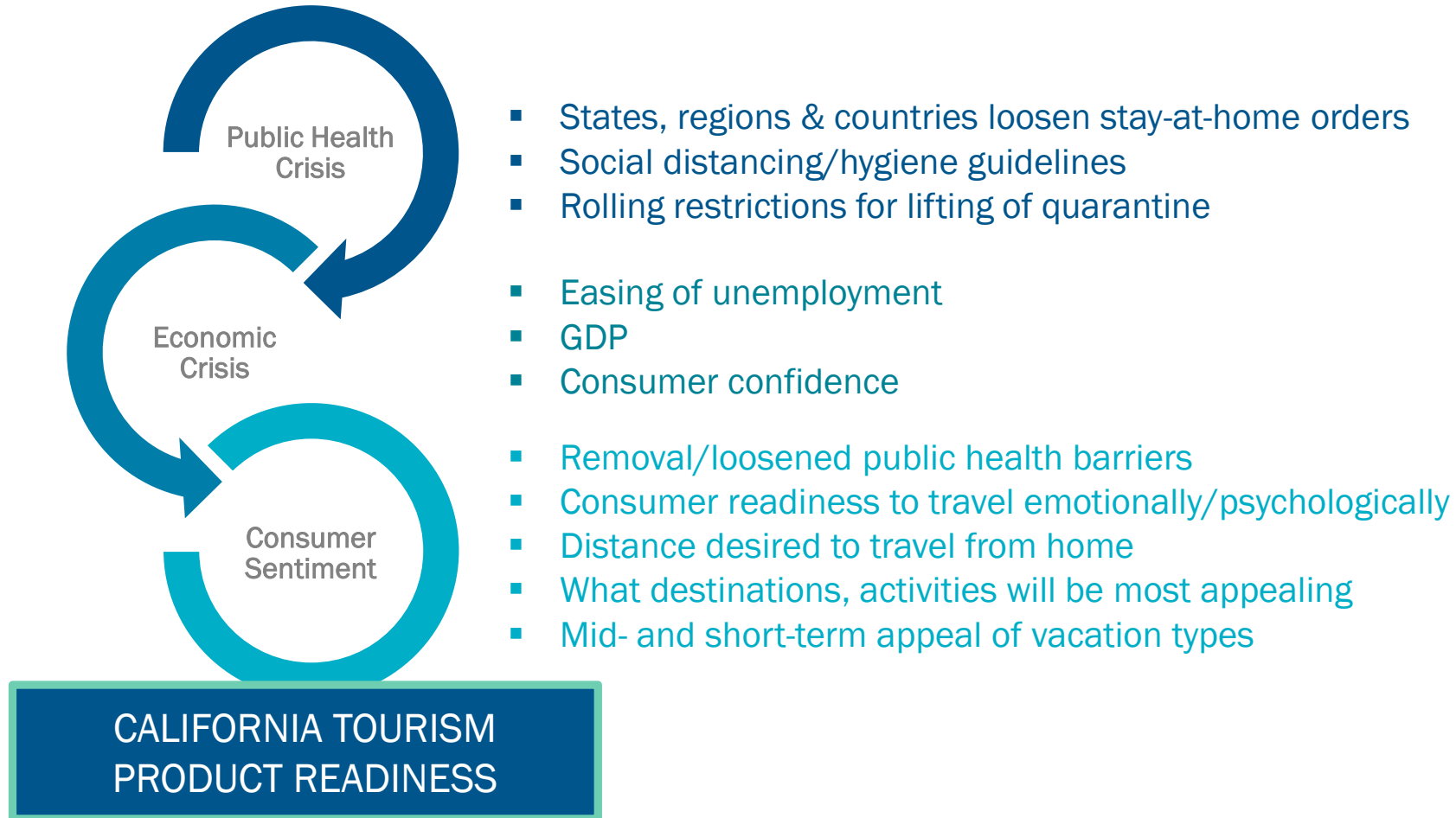
STRATEGY:

Restore travel spending and tourism jobs in California by promoting travel to the state's largest and most immediate market, in-state travelers, and ultimately deliver sustained economic recovery by recovering visitation from all U.S. markets.



Marketing Timeline

Three conditions will inform the strategy for marketing efforts



Target Audience by Wave



Three Wave Integrated Marketing Strategy



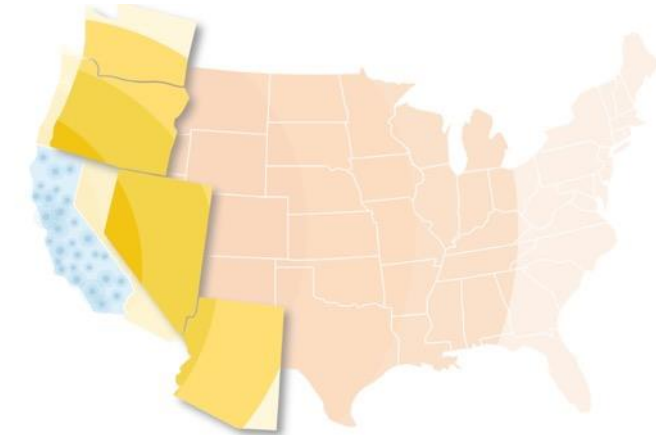
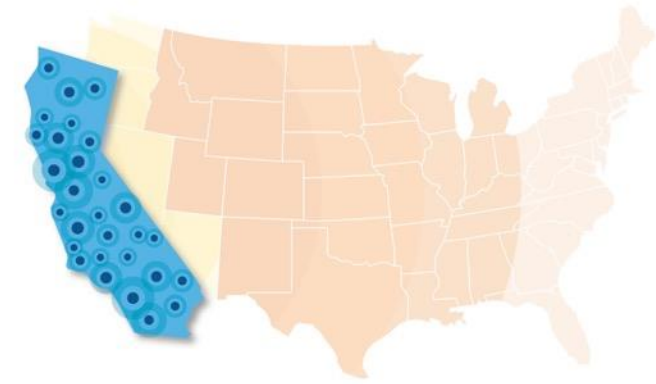
COVID-19 Crisis Recovery: Key Media Partnerships



California News Publishers Association

Partner with the CBA and CNPA, leveraging Association clout to encourage member participation and deliver a dollar-for-dollar match

Planned and Leveraged Media Plan



Waves 1/2/3: In-State / In-State + Western Region / In-State + National

Channel	Planned Investment	Leveraged Investment (Target Projections)	Total Investment (Paid/Leveraged)
Paid Media	\$40M	\$15.5M	\$55.5M
Production	\$5M	\$0	\$5M
TOTAL	\$45M	\$15.5M	\$60.5M
			+39%

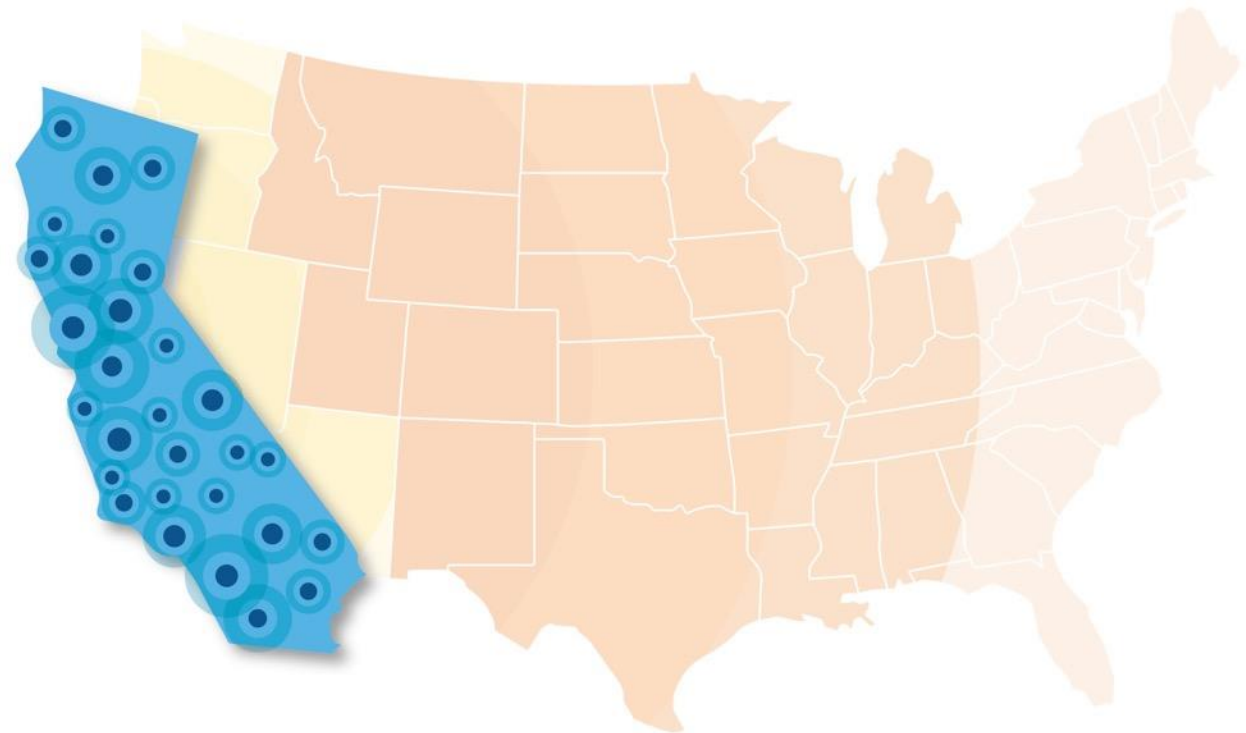


WAVE 1: “Calling All Californians”

Wave 1: In-State Strategy

73% of California travel volume comes from residents traveling around the state — Californians are key jump starting the Golden State economy

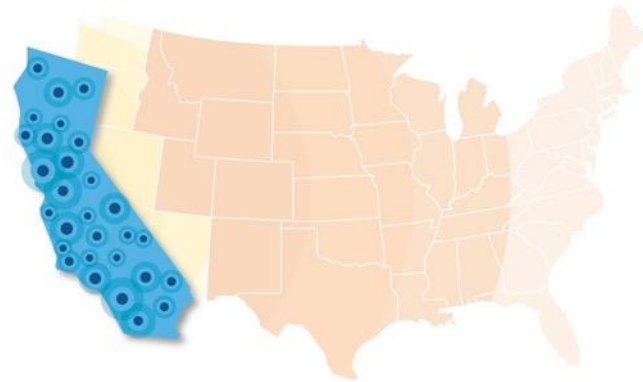
- Encourage Californians to get out, travel and spend money with local businesses in communities large and small
- Appeal to a sense of duty and civic pride, while reminding residents of the many great things to be experienced in their home state



Wave 1: Paid Media Strategy

- Layered media across traditional & digital channels
- Digital targeting to hit mid-to-bottom funnel
- Advanced retargeting to build frequency
- Mass PSA video distribution across linear TV & digital channels

Wave 1: Media Investment by Channel



Wave 1: In-State			
Channel	Planned Paid Investment	Leveraged Investment (Target Projections)	Total Investment (Paid/Leveraged)
Spot Television	\$4.7M	\$4.7M (100%: CBA* assisted)	\$9.4M
PSA	\$500K	\$1.5M (300%: CBA* assisted)	\$2.0M
OTV	\$819K	\$205K (25%)	\$1.0M
Digital/Social	\$1.0M	\$200K (20%)	\$1.2M
Newspaper	\$750K	\$750K (100%: CNPA** assisted)	\$1.5M
Spot Radio	\$2.4M	\$2.4M (100%: CBA* assisted)	\$4.8M
Digital Radio	\$250K	\$63K (25%)	\$313K
Outdoor	\$1.1M	\$275K (25%)	\$1.4M
Search	\$72K	-	\$72K
TOTAL	\$11.6M	\$10.1M	\$21.7M
			+87%

*Investment across CBA networks total \$7.6M (66% of paid media)


**Investment across CNPA outlets total \$750K (6% of paid media)

Wave 1: “Calling All Californians” Campaign

Creative Approach

Californians have been supporting local businesses, first responders and one another during the crisis. “Calling All Californians” will appeal to this same sense of duty and civic pride post-coronavirus, with an invitation to celebrate our state’s unrivaled abundance and get back to living like a Californian.

This multifaceted campaign will encourage residents to get out, have some fun and help get the Golden State economy moving.





Public Service Announcement

- Develop PSA assets to be distributed through the CBA PEP program
- 1000+ Television & Radio stations in California
- Guaranteed 3:1 return on all dollars invested



30-second Radio Spot



“CALLING ALL CALIFORNIANS” (:30)

Calling all Californians — your fellow Californians need you, to vacation here in our home state.

Let's get out and explore our cities and towns.

Check in at our favorite resorts.

Get some thrills at our theme parks.

Enjoy our wineries, restaurants, boutiques and breweries.

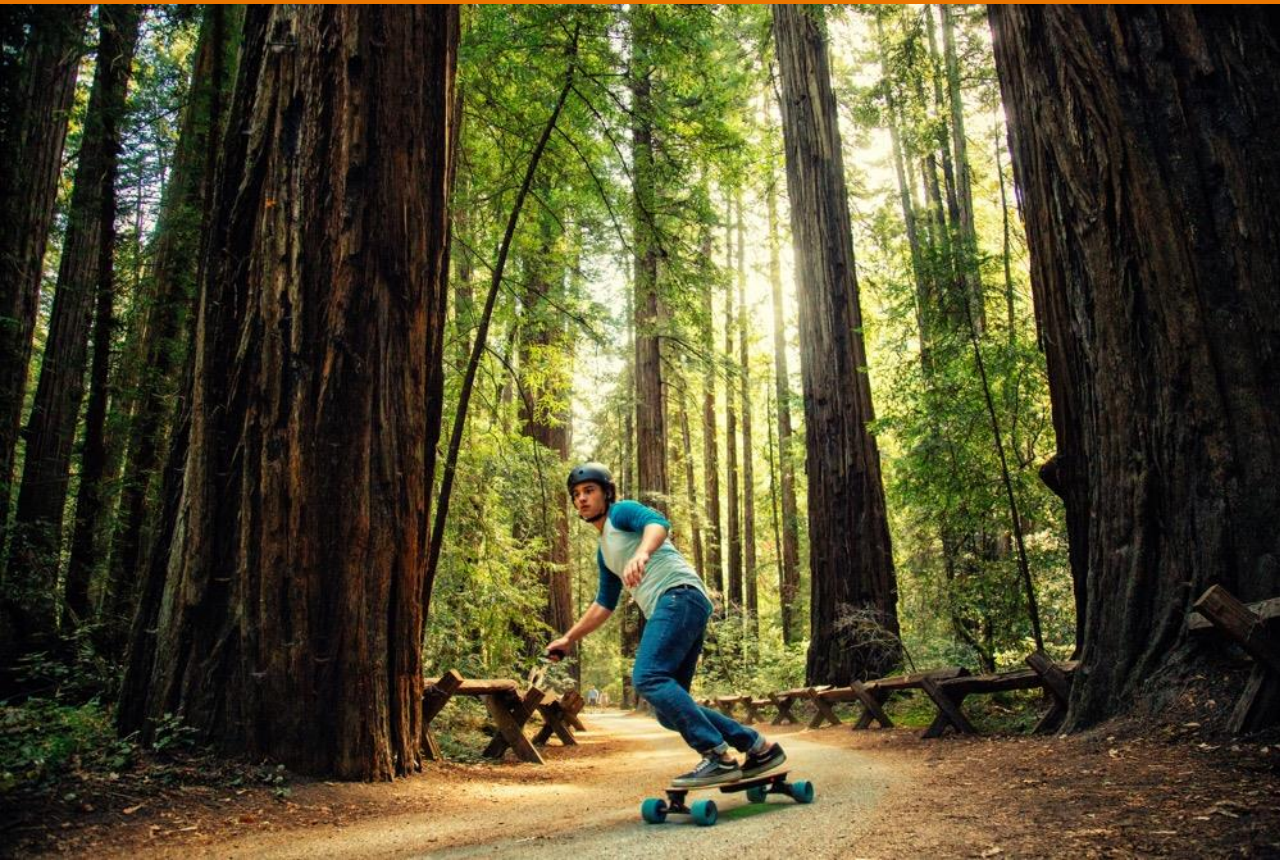
Dine. Sip. And shop local. Live a little.

You'll be helping California businesses, communities and our economy a *lot*...

All while enjoying an epic vacation.

Find ideas and inspiration for your Golden State getaway at CaliforniaNow.com.

60-second Radio Spot



“REDWOODS” (:60)

You know those gorgeous gigantic Redwoods we have here in California? Ever wondered how the heck they stay upright? Well, it's thanks to other Redwood trees. Their roots are intertwined, literally holding each other up.

Kinda like our people here. We support one another. Have each other's backs.

That's why we're calling all Californians to help our fellow Californians now. And all you need to do is take a vacation anywhere here in our amazing state.

Get out and spend some time at our beaches. Hit the mountains. Explore our vibrant cities and quaint towns. Dine in our restaurants. Sip at our wineries. And shop local.

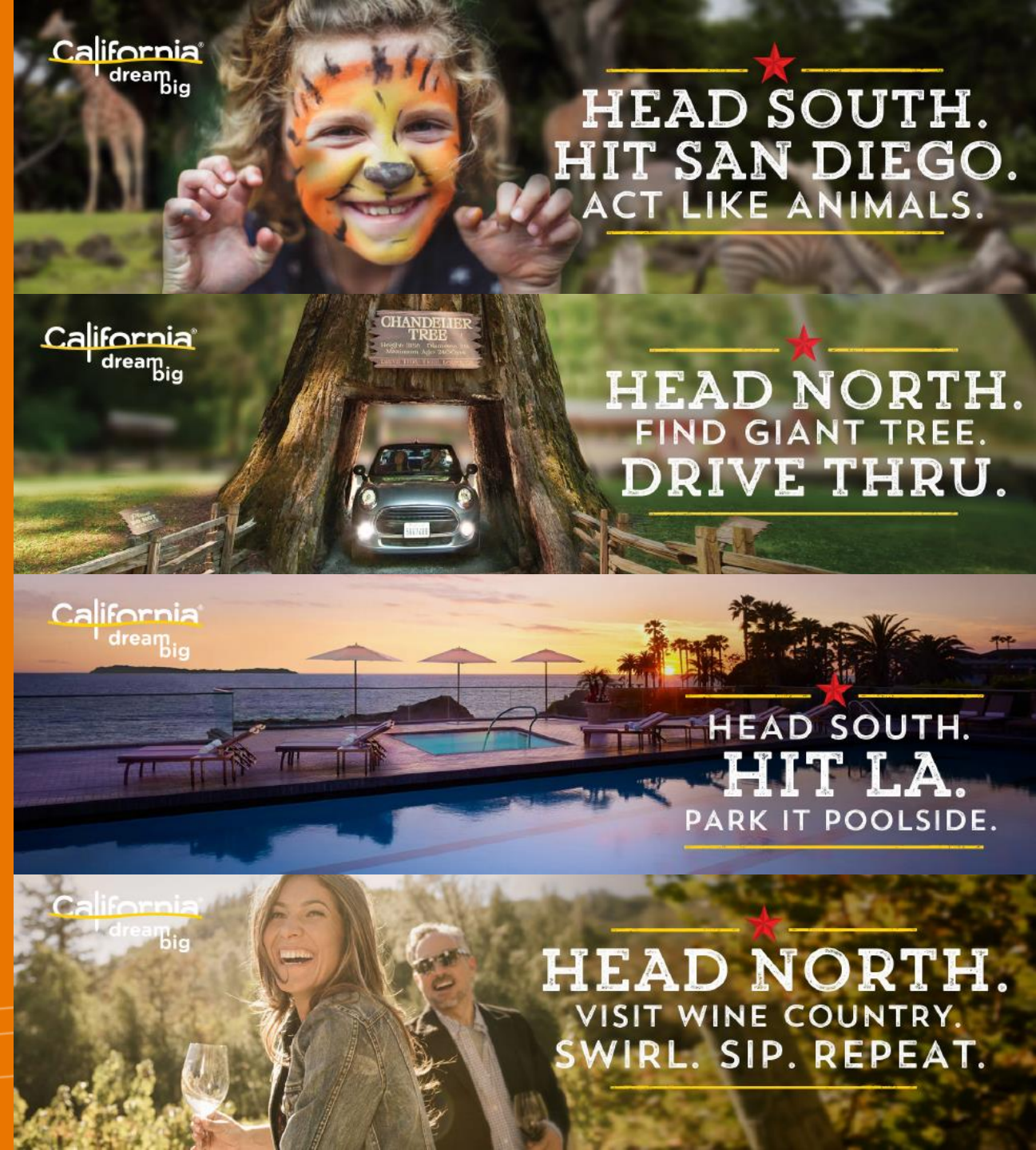
While you're out here, maybe take a drive through some of those giant trees.

You'll be supporting our everyone in our extended California family — putting people to work again and helping our entire economy get back up, and standing strong, just like our Redwoods.

Find ideas and inspiration for your Golden State getaway at CaliforniaNow.com.

Out-Of-Home & Digital Creative

- More than 20 versions highlighting all regions of California





California[®]
| dream
big



HEAD NORTH.
HIT SLO.
TAKE IT SLOWER.




California[®]
| dream
big



POINT CAR EAST.
BUCKLE UP.
ROAM FREE.

Wave 1: Earned Media Objectives

- Amplify PSA and paid media campaign to a broader in-state audience through earned media placements
 - Create safer visitor behavior through a traveler pledge
 - Integrate radio spot messaging into media talking points including the how supporting fellow Californians is like Redwood Trees – with intertwined roots, literally holding each other up.
- 

Wave 1: Earned Media Outreach Strategy

- Deploy inspirational and informational content with strong safe travel call-to action, encourage community support.
- Underscore economic need for Californians to travel, activate leaders and coalition partners around California civic pride.

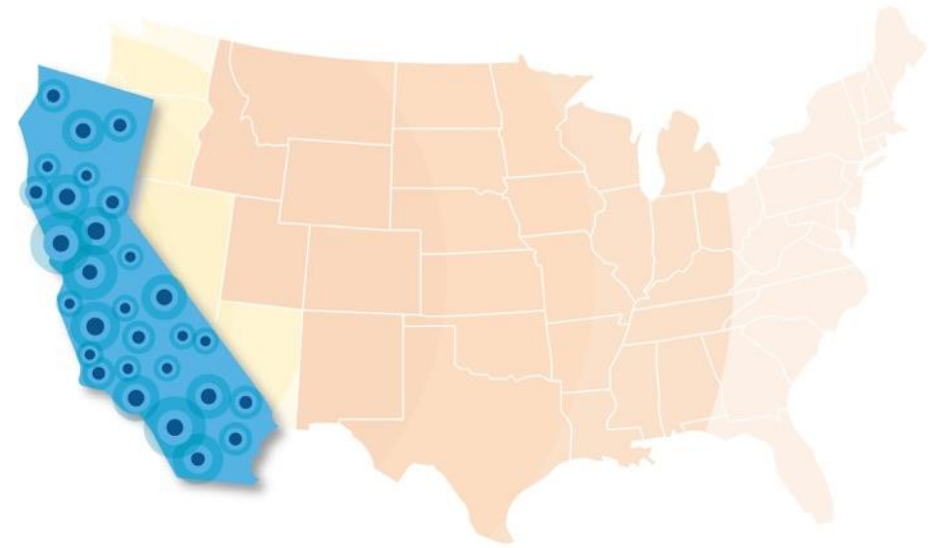
Wave 1: Earned Media Tactics

1. Ongoing Travel & Business Media Outreach

- Why Californians should explore their home state now
- Support businesses that helped during the crisis
- Revisit workforce examples : Where are they now?
- New rules of responsible travel: “California NOW Responsible Travel Pledge”

2. Activate Key Opinion Leaders

3. Promote Business Recovery Initiatives and Social Distancing Protocols



MEDIA TARGETS

In-state outlets and influencers
(travel/business/economics)

Wave 1: Owned Content Strategy

- Content that anticipates travelers' desires for **flexible itineraries** as well as attractions and experiences that allow visitors to ease back into the travel space.
 - Road Trips (in state)
 - Restorative Travel
 - Solo Travel

Wave 1: Owned Content Tactics

VisitCalifornia.com

- Calling All Locals
- Civic Pride Messaging
- Deals & Discounts

California Now Blog

- Trip Planning (near term)
- Deals & Discounts
- Road Trips & RV Travel
- Reopenings

California Now Podcast

- California Locals Integration
- Deals & Discounts
- Road Trips & Intra-state Travel

Print

- California is Calling Special Section

E-newsletter

- Weekly sends: local deals, road trips
- Community Support
- List Building

Social Media

- Calling All Californians (state pride, community love and support, weekend road trips, challenges)

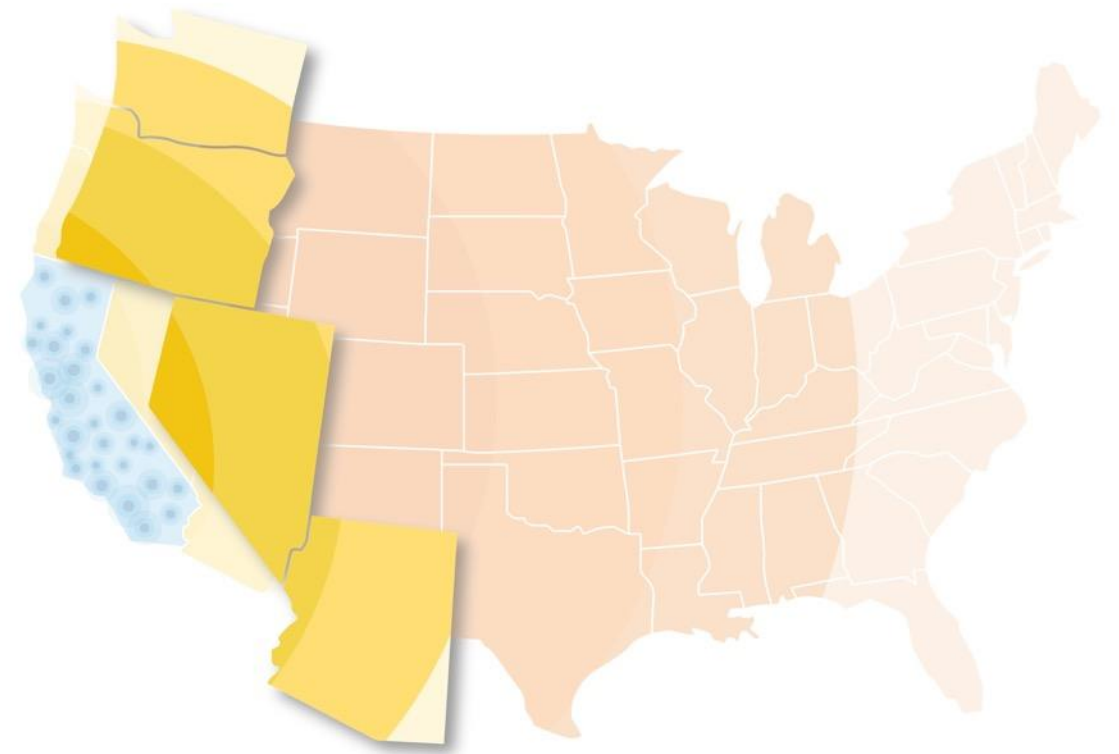


WAVE 2: “California Is Calling”

Wave 2: Western Region Strategy

Nearby Western Region drive markets — Phoenix, Las Vegas, Portland & Seattle — account for 8% of California travel volume

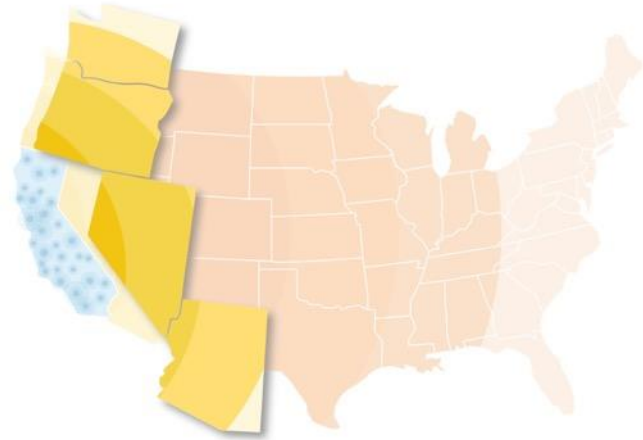
- Significantly growing over the last two years, road trips will be a primary vacation type during recovery
- Appeal to nearby ‘resilient travelers’ to take a California road trip and explore all the Golden State has to offer



Wave 2: Paid Media Strategy

- Continue with layered media across channels
- Continue with digital targeting & retargeting
- **Expand into key drive markets** — Arizona, Nevada, Oregon & Washington

Wave 2: Media Investment by Channel



Wave 2: In-State + Western Region

Channel	Planned Paid Investment	Leveraged Investment (Target Projections)	Total Investment (Paid/Leveraged)
Spot TV	\$1.7M	\$425K (25%)	\$2.1M
OTV	\$1.0M	\$250K (25%)	\$1.3M
Digital/Social	\$1.2M	\$240K (20%)	\$1.4M
Newspaper	\$750K	\$750K (100%: CNPA** assisted)	\$1.5M
Spot Radio	\$600K	\$150K (25%)	\$750K
Digital Radio	\$300K	\$75K (25%)	\$375K
Outdoor	\$577K	\$144K (25%)	\$721K
Search	\$72K	-	\$72K
TOTAL	\$6.2M	\$2.0M	\$8.2M
			+32%


**Investment across CNPA outlets total \$750K (12% of paid media)

Wave 2: “California Is Calling” Campaign

Creative Approach

Road trips have been on the rise for five straight years. In 2019, Visit California developed a robust initiative to position California as the ultimate road trip destination.

The “California Road Trip Republic” campaign provides a ready-made suite of assets that enable California to call on its nearby drive market neighbors and invite to journey to the Golden State where 395,000 miles of roadways, 840 miles of jaw-dropping coastline and countless opportunities for adventure await.



30-second Radio Spot



“BUCKLED IN” (:30)

Light, upbeat music bed.

In the California Road Trip Republic, we believe that buckled into a seatbelt is where we are most free.

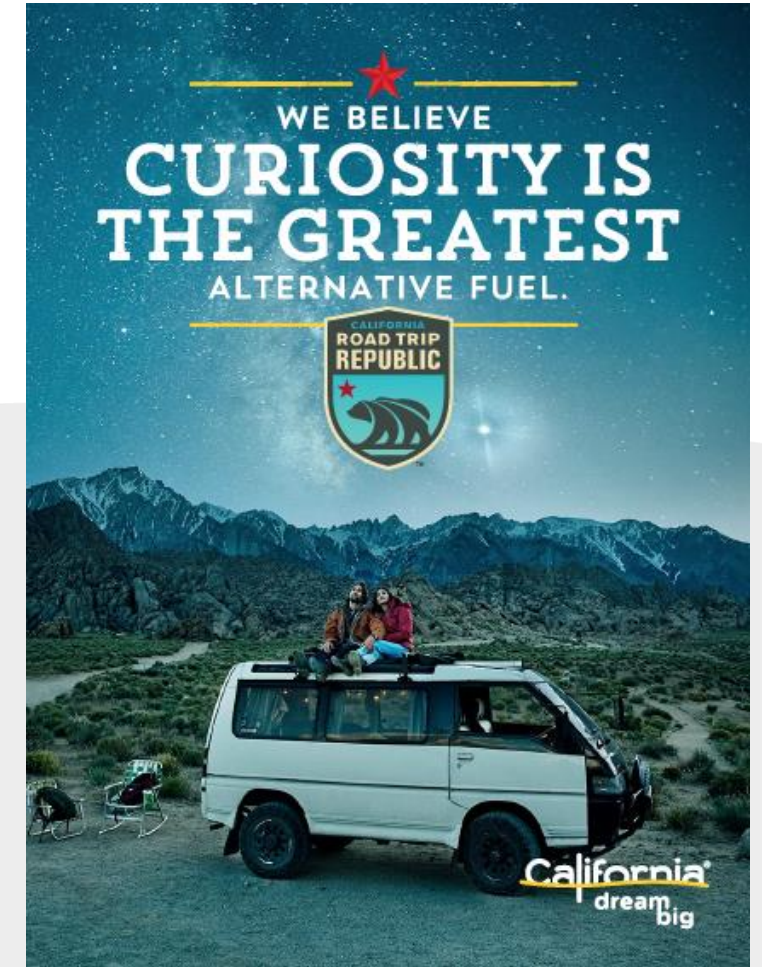
So, it's time to declare your independence and hit the road.

Come, coast along the ocean. Swing through our cities. Or head out in the wide-open wilderness, chasing horizons and natural wonders.

All you need to do is grab the wheel and let go of everything else.

For all the ideas and inspiration you need to kick start your California road trip, stop by VisitCalifornia.com.

Out-Of-Home & Digital Creative





ROAD TRIP REPUBLIC™

- ["Born To Be Wild"](#) Online TV



Wave 2: Earned Media Outreach Strategy

- Deploy inspirational and informational content with strong safe travel call-to action.
- Leverage West Coast Tourism Recovery Coalition to differentiate western states.

Wave 2: Earned Media Tactics

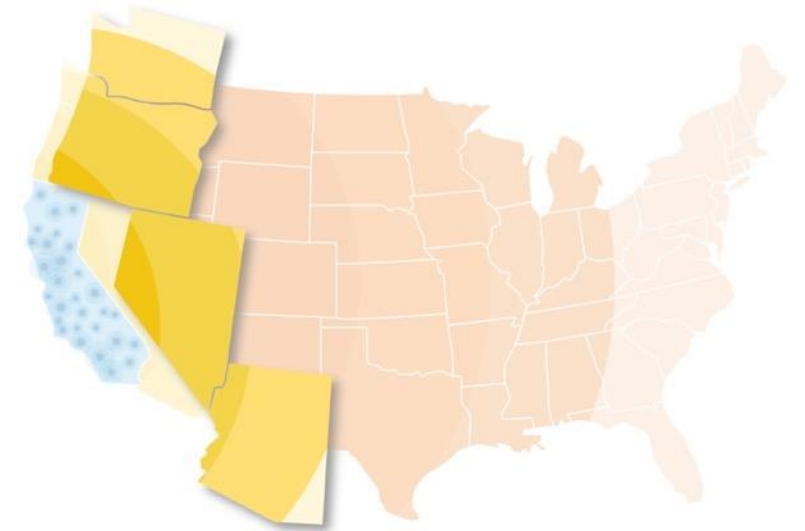
1. Ongoing Travel & Business Media Outreach

- Road trips from key drive markets – what to see along the way
- Socially distanced travel experiences for families
- Why California now? New openings and experiences waiting for travelers to return

2. Leverage West Coast Tourism Recovery Coalition

- Relaunch WestCoastTravelFacts.org with content focused on responsible travel

3. Resume travel media engagement (virtual events)

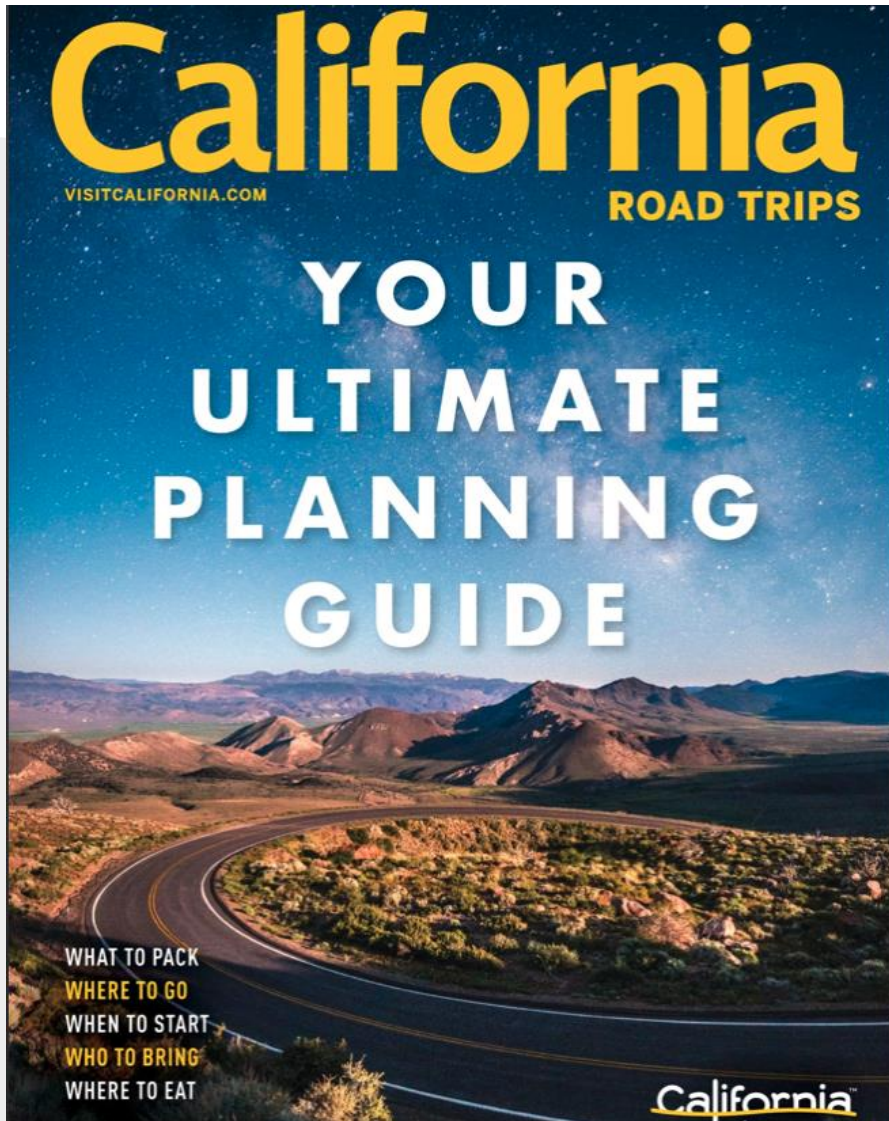


MEDIA TARGETS

Western states outlets and lifestyle media, influencers (travel/business/economics)

Wave 2: Owned Content Strategy

- Content to supports specific needs of California travel industry, focus on increasing visitation from in state and Western state travelers.
 - Road Trips (in state, Western States)
 - Deals & Discounts
 - Shop Local Stories
 - Reopenings



Publication: California Road Trips Guide

- 1 million total distribution
- Nearly \$300,000 in advertising secured
- Mid-July release to California and Western States through Parents Magazine, Better Homes & Gardens, Travel + Leisure

Wave 2: Owned Content Tactics

VisitCalifornia.com

- California Locals Integration

California Now Blog

- Trip Planning (short term)
- Deals & Discounts
- Road Trips & RV Travel
- Reopenings

California Now Podcast

- California Locals Integration

Print

- Road Trips Guide (CA & Western Region distribution)
- California Visitor's Guide 2021 (CA distribution)

E-newsletter

- Weekly Sends: local deals, road trips
- List Building

Social Media

- Drive Market Ideas
- Road Trips
- Trip Planning
- Real time information



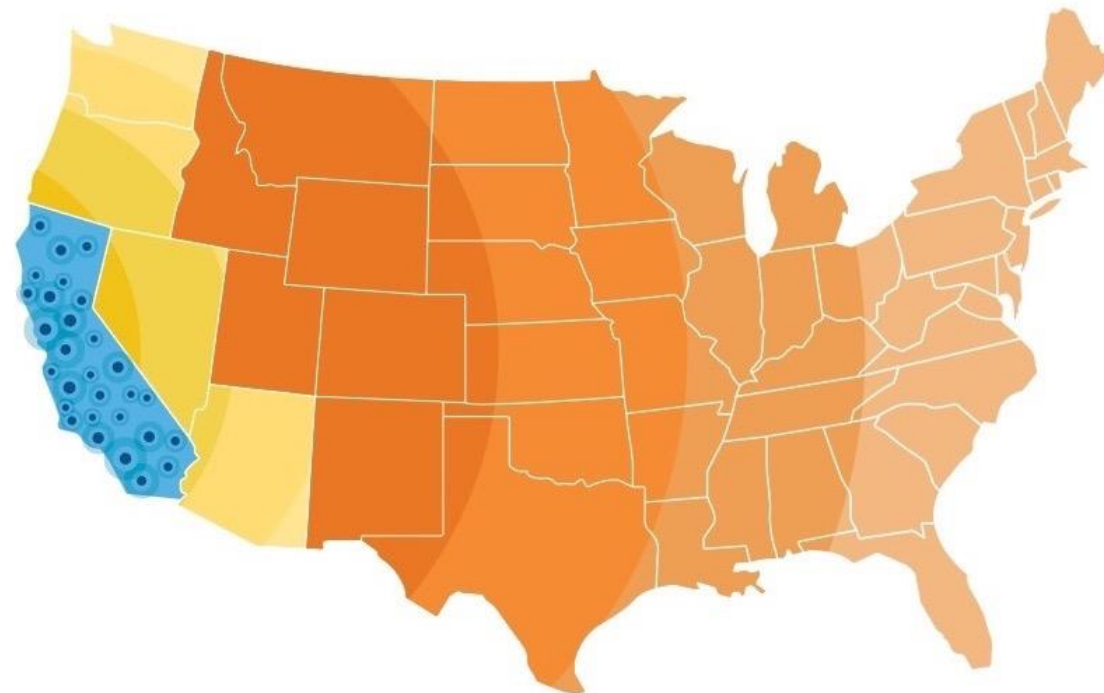
WAVE 3

**“All Dreams Always Welcome
in California ”**

Wave 3: National Strategy

Long haul Domestic markets generate longer lengths of stay
and greater per trip spend in California

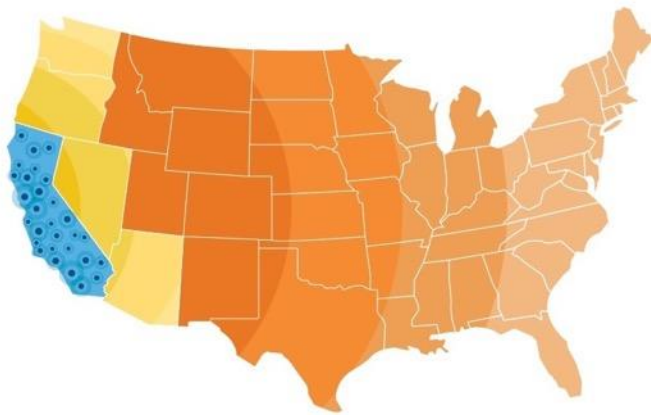
- Broad-reach campaigns are the best way to drive market share, and the primary driver of market share is penetration
- Move back to a National media plan (including California and Western Region states) to reach more target households and deliver greater impact over the long-term



Wave 3: Paid Media Strategy

- Incorporate mass reach media — National Cable TV & Video-on-Demand (VOD)
- Expand all digital channels to National coverage, including California, while maintaining targeting & retargeting
- Migrate to a core “Visit California” call to action.

Wave 3: Media Investment by Channel



Wave 1: In-State + National

Channel	Planned Paid Investment	Leveraged Investment (Target Projections)	Total Investment (Paid/Leveraged)
National TV	\$12.8M	\$1.3M (10%)	\$14.1M
OTV	\$4.3M	\$1.1M (25%)	\$5.4M
Digital/Social	\$5.0M	\$1.0K (20%)	\$6.0M
Search	\$72K	-	\$72K
TOTAL	\$22.2M	\$3.4M	\$25.6M
			+15%

Wave 3: “All Dreams Always Welcome”

Campaign Creative Approach

Californians share a wholly unique lifestyle and attitude that celebrates diversity and champions being open-minded. That’s why California has always been a magnet for dreamers and their dreams. The Golden State is a place where all dreams are always welcome.

In development now, this new multifaceted campaign will be the next chapter of Visit California’s highly lauded brand advertising program with an open invitation for all to dream big.



Wave 3: Earned Media Outreach Strategy

- Promote 'open for business' messaging with emphasis on aspects of travel experience that have changed.
- Resume broad domestic media outreach efforts with inspirational, responsibly travel calls to action.

Wave 3: Earned Media Tactics

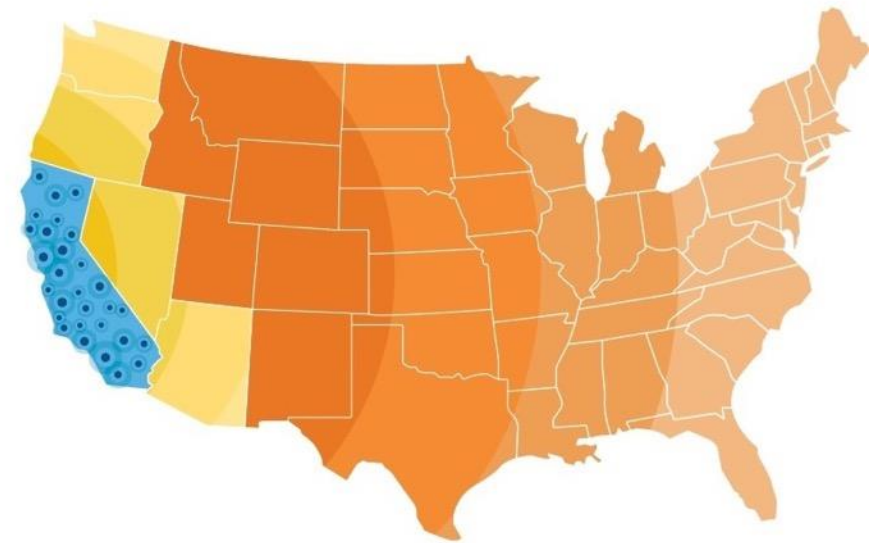
1. Ongoing Travel & Business Media Outreach

- California is open for business
- What to expect when traveling in California now

2. Distribute real-time information on California product updates

- Special edition of 'What's New in California' newsletter

3. Reinstate media hosting for key opportunities



MEDIA TARGETS

In-state, regional and national outlets
(travel/business/economics)

Wave 3: Owned Content Strategy

- Content that inspires consumers in-state and nationally to dream about and plan their California vacation.
 - Road Trips (national)
 - Travel Inspiration
 - Monthly Events Calendar
 - National & State Parks
 - Destination Spotlights
 - Gateway Updates

Wave 3: Owned Content Tactics

VisitCalifornia.com

- Inspiration
- Trip Planning

California Now Blog

- Current Information
- Responsible Travel

California Now Podcast

- Inspiration
- Responsible Travel


Print

- California Visitor's Guide 2021

E-newsletter

- Weekly sends
- Current Trip Planning
- List Building (national)

Social Media

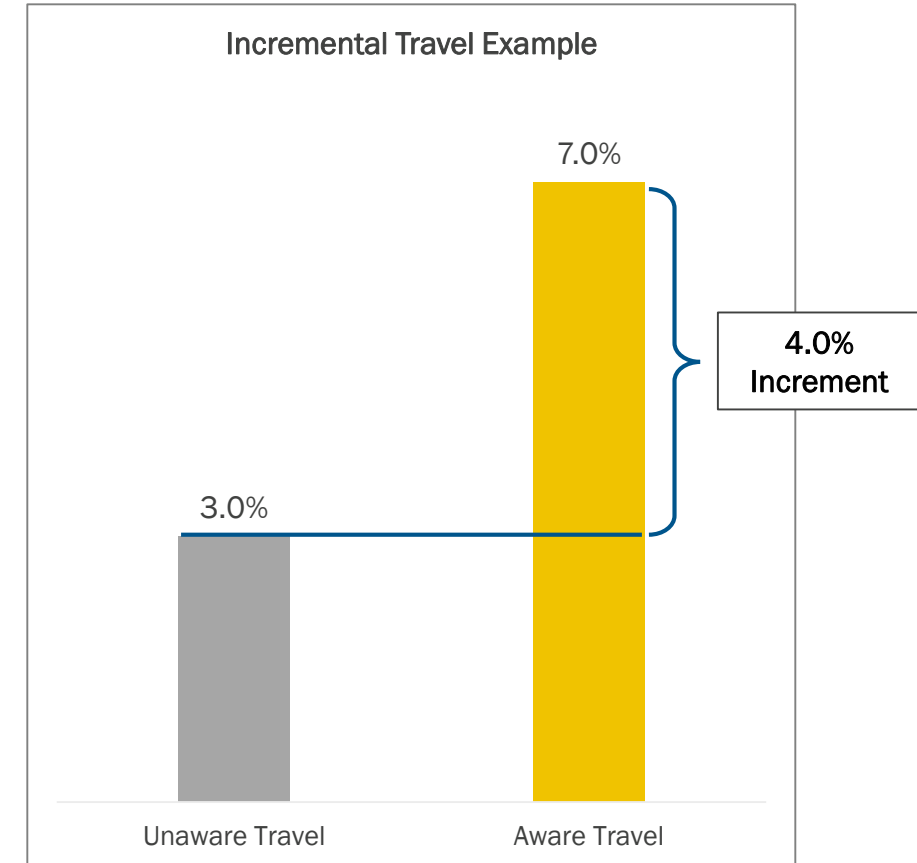
- Trip Planning
 - Call to Action to Visit
 - Return to 'Always On' Approach
- 



Advertising Measurement & Economic Impact

How Visit California Measures ROI

- Visit California measures marketing impact by calculating ***“incremental spending”***
- Measuring incremental travel is the key to producing a ***conservative*** measure of advertising impact
- Consumers would visit a destination regardless of advertising efforts: ***Visit California does not count all ad-aware trips as an influenced trip***
- Rather, the level of travel among those unaware of the advertising represents the travel that would have occurred with no advertising
- The ***additional*** level of travel observed among those aware of the advertising is considered ***influenced***, or ***incremental***



Calculating Advertising Effectiveness



Visit California conducts ad research with Strategic Marketing and Research Insights, LLC. to track the number of people who visited the state after viewing an ad. It is assumed that a percent of travelers visit a destination regardless of advertising efforts; therefore Visit California only measures the percent of travelers above that baseline. This resulting number of travelers is credited to Visit California advertising. The visitor spend and resulting local and state tax revenue from these incremental trips provides the return on advertising effectiveness.

Advertising Measurement: Key Indicators

Key inputs to calculate ROI:

- First party research collected via ongoing consumer surveys (SMARInsights)
 - Overall Awareness
 - Rate of travel
 - Rate of spend

Additional indicators:

- Visa Vue (Visa data)
 - Rates of spend by source markets, monitored via Visa Vue Travel services
- TravelTrakAmerica (OmniTrak)
 - # and proportion of in-state trips made by Californians over time, monitored via OmniTrak
 - # and proportion of trips to California made from other Western feeder markets and rest of U.S., monitored via OmniTrak
- Tourism Economics/US Travel
 - California share of US Domestic trips

Projected Economic Impact



\$10.3 BILLION

incremental visitor spending
to businesses



**\$865
MILLION**

additional state and local
tax revenue



168,000

jobs created



Appendix

"CALLING ALL CALIFORNIANS" LEVERAGED MEDIA RECOVERY CAMPAIGN

	CAMPAIGN WAVE 1		CAMPAIGN WAVE 2	CAMPAIGN WAVE 3	
	CY 2020			CY 2021	
	Q3		Q4	Q1	Q2
	IN-STATE (CA)		IN-STATE (CA) & WESTERN REGION (WR)**	NATIONAL (including California)	
BRAND TARGET					
LINEAR TELEVISION					
– Spot TV					
– Cable TV/VOD	PSA (CBA assisted)		CA: SF/LA/SD/SAC (PAID)	NATIONAL	
ONLINE VIDEO (Hulu, YouTube)	PSA				
DIGITAL					
– Display (GDN, TripAdvisor)					
– Social (Facebook, Instagram)					
NEWSPAPER PRINT/DIGITAL (CNPA)					
PRINT	CA: Tier 1 Markets* (CNPA assisted)				
DIGITAL	CA: Tier 1 & 2 Markets* (CNPA assisted)				
OUT-OF-HOME	CA: SF/LA/SD/SAC		CA: SF/LA/SD/SAC WR: LV/PHX/POR/SEA		
AUDIO					
– Terrestrial Radio (Spot, Radio, Traffic, Weather)					
– Digital Radio (Pandora, Spotify)	CA: Tier 1 & 2 Markets*		CA: Tier 1 & 2 Markets* WR: LV/PHX/POR/SEA**		
FAMILY TARGET					
LINEAR TELEVISION					
– Cable TV/VOD				NATIONAL	
ONLINE VIDEO (Hulu, YouTube)					
DIGITAL					
– Display (GDN, TripAdvisor)					
– Social (Facebook, Instagram)					
ALWAYS ON					
CALIFORNIA NOW DIGITAL					
– Display (GDN, TripAdvisor)					
SEARCH					

* IN-STATE TIER 1: LOS ANGELES | SAN FRANCISCO/BAY AREA | SAN DIEGO | SACRAMENTO

* IN-STATE TIER 2: BAKERSFIELD | CHICO-REDDING | FRESNO | MERCED | MODESTO | MONTEREY/SALINAS/SANTA CRUZ | OXNARD/VENTURA | PALM SPRINGS | RIVERSIDE-SAN BERNARDINO |

SAN LUIS OBIPO | SANTA BARBARA | SANTA MARIA/LOMPOC | STOCKTON | VICTOR VALLEY | VISALIA -TULARE-HANFORD

** WESTERN REGION: ARIZONA | NEVADA | OREGON | WASHINGTON