Reminder

*Please turn cell phones to silent*
Panorea Avdis

Director
Governor's Office of Business and Economic Development
Electronic voting system
Roll call
Feb 24, 2016
meeting minutes
Opening Remarks
Today’s Agenda

9 a.m.
Call to order

9:15 a.m.
CEO Report

9:45 a.m.
Guest speaker:
Secretary Karen Ross

10 a.m.
Nominating Committee Update

10:25 a.m.
ROI Discussion

10:40 a.m.
Marketing Advisory Committee

11:45 a.m.
Approval of FY16/17 Marketing Work Plan and Budget

12:45 p.m.
Adjourn & Lunch
National Update
Marketing

USA

- Media affinity programs (Google, TripAdvisor)
- Brand USA Inspiration Guide
- National Geographic outdoor partnership
Policy

U.S. TRAVEL ASSOCIATION

- Air travel
- Visa waiver
- Project: Time Off
DMAI new leadership

Don Welsh
President & CEO

Alison Best
EVP of Member Engagement
DMAI California leadership

Tammy Blount
President & CEO
Monterey County CVB

Jay Burress
President & CEO
Anaheim/OC VCB

Kathy Janega-Dykes
President & CEO
Santa Barbara CVB

Gary Sherwin
DMAI Chair Elect
President & CEO
Visit Newport Beach
U.S. Travel & DMAI: 1+1=3

National Travel Advocacy Strategy (U.S. Travel)

Activated Local Advocacy Efforts (DMAI)

A stronger and more united travel industry
Tourism’s economic impact in annual travel-related consumer spending

2014: $117.5 billion
2015: $122.5 billion

Source: Tourism Economics, Dean Runyan Associates
Tourism’s economic impact

2014
$9.6 billion

2015
$9.9 billion
in state and local tax revenue

Source: Tourism Economics, Dean Runyan Associates
Tourism’s economic impact
2015
36,000
new tourism jobs in California

Source: Tourism Economics, Dean Runyan Associates
Growth continued in 2016

<table>
<thead>
<tr>
<th></th>
<th>California</th>
<th>U.S.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Lodging (April YTD)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Occupancy</td>
<td>+2.0%</td>
<td>-0.5%</td>
</tr>
<tr>
<td>Average Daily Rate</td>
<td>+8.6%</td>
<td>+3.2%</td>
</tr>
<tr>
<td>Revenue Per Available Room</td>
<td>+10.8%</td>
<td>+2.7%</td>
</tr>
<tr>
<td><strong>California Airport Traffic (February YTD)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Domestic</td>
<td>+6.7%</td>
<td></td>
</tr>
<tr>
<td>International</td>
<td>+12.6%</td>
<td></td>
</tr>
<tr>
<td><strong>Welcome Center Traffic (April YTD)</strong></td>
<td>+2.2%</td>
<td></td>
</tr>
<tr>
<td><strong>Leisure &amp; Hospitality Employment (Mar/Apr)</strong></td>
<td>+4.1%</td>
<td>+3.0%</td>
</tr>
</tbody>
</table>

Source: Smith Travel Research
San Diego’s experience

When marketing stops, occupancy declines

Sources: STR, Tourism Economics
Total tourism investment

$0M
$50M
$100M
$150M
$200M
$250M
$300M


TBIDS
VISIT CALIFORNIA
Visit California At Work
February-May 2016
CALIFORNIA always in season

PART 5 Vincent Ricchuiti and his father, Patrick, are farmers who are changing the way we think about olives by growing and pressing the freshest organic olive oil on the market.

watch the accompanying video at
visitcalifornia.com/californiagrown

CALIFORNIA OLIVES

The olive grove of La Luz Farm is
productively tended by two
olive oil producers who

California Olives

For part five of our six-part series, we land in Ojai, in the heart of California’s
San Ysidro Valley, where Patrick Ricchuiti, president of P.R. Farms Inc., is
growing the business his grandfather, Vincent Ricchuiti, started over
100 years ago.

quality of freshness

Vincent, who left his native Italy for America in 1914, settled alongside his
cousin, Luigi, planting the first family orchard with grapes and figs. Their son Pat went on to buy the
farm from his father in 1946 and chuyển the opus by adding olives and lemon. To further
expand the business, Pat constructed a state-of-the-art cold storage and packaging house along
with his son, Patrick.

Today, the Ricchuiti reputation for growth and change continues. The family has experienced
many changes, purchasing from tiny Table retail store, turning olive oil making opus in Ojai, which is
now run by Patrick’s son, Vincent, and an almonds harvesting and processing plant in Ojai.

With his shaker and Venny Dutolo
The co-owner and co-chefs behind
the word-in-in-animal-suns of a Los Angeles and

Q&A

WS: What did you first experiment California green products?
MM: When we were young kids in Florida, we would go
camping and would make dishes like from California, and
it was a big deal. And now I have these growing in
my backyard.

WS: Why did you decide to open your first restaurant in
Los Angeles?
MM: I think Los Angeles was the perfect place. We
really enjoy ourselves here and there is a ton of oppotunity. Plus, it’s
beautiful here, pretty much 365 days a year.

WS: What is your favorite ingredient to use in your cooking?
MM: I love using olive oil, especially our own. It’s

WS: Tomatoes, olives, olive oil—all we can get strawberries
10 months out of the year, sometimes I—what I’ll turn on and

WS: Why did you use this particular California olive oil?
MM: Our olive oil is perfect for our dishes because we were looking for an oil that
has a nice balance of fruitiness and robustness. The Baja Olive Oil was perfect
because it has a nice balance of fruitiness and robustness. The Baja Olive Oil is

WS: How is this oil different from other olive oils?
MM: Our oil is naturally cold-pressed, which helps
retain the natural flavors and nutrients.

WS: What is the best use for this oil?
MM: It is great for salad dressings, sauces, and cooking.

WS: What is the unique flavor profile of your oil?
MM: Our oil has a unique taste profile with notes of fruitiness,
spiciness, and a hint of sweetness.

WS: How is this oil produced?
MM: Our oil is produced in our on-site mill using traditional
methods. We press the olives fresh each day to ensure
the highest quality.

WS: Is this oil available in other areas?
MM: Yes, we sell our olive oil in our restaurant, as well
as online and at local farmer’s markets.
California always in season

PART 6. Casey Houweling is a farmer who has mastered the art of growing tomatoes using cutting edge technology at his sustainable greenhouses.

GREENHOUSE FARMING

Houweling's Farm in Camarillo, California was one of the first farmers in the world to use computer controlled greenhouses.

Q&A

WITH JOHN SHOOK AND VINNY RUTUOLIO
THE CO-OWNERS AND CO-CEOS OF ANIMAL, SON OF A GUN AND JOHNNYS

Where do you source most of your ingredients from?

John: I would say 99.50% of our produce comes from locally grown California farmers. We purchase from over 50 different farmers. We have our own processing plant on site, which is the only one in California. Our produce is always fresh and delicious.

Vinny: We also source from local farmers who use sustainable farming practices. This ensures that our produce is of the highest quality.

How are you using these in your restaurant?

John: We use all of the produce in our restaurants. From the vegetables to the fruits, we use everything. This ensures that we are using all of the produce that we purchase.

Vinny: We also use the produce in our dishes. This ensures that we are using all of the produce that we purchase. We also use the produce in our dishes. This ensures that we are using all of the produce that we purchase.

What is your favorite ingredient to cook with?

John: I love using tomato paste in our sauces. It adds a lot of flavor to our dishes.

Vinny: I love using tomatoes in our dishes. They add a lot of flavor and color to our dishes.

Why are you using tomatoes so special?

John: They're grown to maximum flavor on the vine and off the vine and then brought to us at the peak of freshness. This ensures that we are using all of the produce that we purchase.

Vinny: We also source from local farmers who use sustainable farming practices. This ensures that our produce is of the highest quality.

Q&A for more information and feature articles. Visit us at www.visitanimal.com or call us 805-383-9745.
When it comes to culinary experiences, from farm tours, farmers markets and farm-to-fork dinners, to food & wine festivals and wine tasting tours, California is always in season.
Karen Ross
Secretary
California Department of Food & Agriculture
Nominating Committee Update
Nominating Committee

Noreen Martin
Chair
CEO
Martin Resorts Inc.

Jot Condie
President & CEO
California Restaurant Association

Ed Fuller
President
Orange County Visitors Association

Rusty Gregory
Chairman & CEO
Mammoth Mountain Ski Area

Lynn Mohrfeld
President & CEO
California Hotel & Lodging Association

Sima Patel
CEO
Ridgemont Hospitality

Joe Terzi
President & CEO
San Diego Tourism Authority
Farewell!

Rusty Gregory
Chairman & CEO
Mammoth Mountain Ski Area

Jot Condie
President & CEO
California Restaurant Association

Lynn Mohrfeld
President & CEO
California Hotel & Lodging Association

Mike Gallagher
Co-Founder & Co-Chairman
CityPASS
Farewell!

Will Withington
General Manager/VP
Enterprise Rent a Car
Commission vacancies (elected)

Current  
(2) Accommodations

July  
(2) Accommodations  
(1) Restaurants & Retail  
(1) Transportation & Travel Services
Rental Cars

For Consideration

Susie Irwin
Vice President
Enterprise Rent a Car
Vote

Commissioner: Susan Irwin
Accommodations

For Consideration

Michael Dunne
Area Vice President of Operations, California Hilton Worldwide

Bobbie Singh-Allen
EVP & COO
California Lodging Industry Association

Steve Arnold
President & COO
Pacific Hospitality Group

Ralph Grippo
President
The Irvine Co.

ALTERNATE
John Arnett
Vice President Operations
Loews Hotels
Vote
Accommodations Nominees
Attractions

For Consideration

Terry MacRae
CEO
Hornblower Cruises and Events
Executive Committee

Paula Beck
Vice President of Global Accounts – West
Avis Budget Group

Ben Webster
Office Managing Shareholder
Littler Mendelson
Shasta Cascade

Xiomara Wiley
SVP of Marketing & Sales
Universal Studios Hollywood

Gene Zanger
Partner
Casa De Fruta Parkway LLC
Vote Executive Committee
New appointees

**Sima Patel**
CEO Ridgemont Hospitality

**John Kelliher**
Co-Founder
Stryder Transportation
Grapeline Wine Tours

**Ernest Wooden Jr.**
President & CEO
L.A. Tourism CVB
Commission vacancies (appointed)

Central Valley
Deserts
High Sierra
San Diego
Financial Report
Sima Patel

Chief Fiscal Officer

Visit California

CEO

Ridgemont Hospitality
Ed Fahey
Managing Partner, Rina Accountancy

Matt Sabbatini
Chief Operating Officer, Visit California
Vote
Feb. 29, 2016 financial statement
Public Affairs
Industry Leadership Platform

2016-2018

James Bermingham
Vice Chair of Marketing
EVP Operations,
Montage Hotels & Resorts

Noreen Martin
Vice Chair of Operations
CEO, Martin Resorts Inc.
Martin Resorts
A collection of premier hotels on California’s Central Coast
Industry Leadership Platform

2016-2018

James Bermingham
Vice Chair of Marketing
EVP Operations,
Montage Hotels & Resorts

Noreen Martin
Vice Chair of Operations
CEO, Martin Resorts Inc.
STAY THE COURSE

DREAM BIG
‘Pathway to Prosperity’

*Industry Leadership Platform — A Bridge to 2019*
‘Pathway to Prosperity’

Activating the plan

• Dream Big global plan fulfillment
• Super Affluent program development
‘Pathway to Prosperity’

Industry relevance

• Travel Matters
• Project: Time Off
Project: Time Off

- **429 MILLION** Days of Unused Leave Annually
- **$52 BILLION** Benefits Forfeited by Employees Annually
- **$224 BILLION** Accrued Vacation Liability Across the Private Sector

We have become a nation of work martyrs and our own biggest barriers to taking vacation, letting fear get in the way of taking time off.
‘Pathway to Prosperity’

Long-term viability

• Reserve fund discussion
• Return on Investment
Adam Sacks
Founder
Tourism Economics
An Assessment of Visit California’s Effectiveness

Adam Sacks
President | Tourism Economics
adam@tourismeconomics.com
## Topics

**Assessing Visit California’s Impact**

<table>
<thead>
<tr>
<th>Why is destination marketing critical?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market headwinds and opportunity</td>
</tr>
<tr>
<td>Historic returns</td>
</tr>
<tr>
<td>Forecasted returns</td>
</tr>
</tbody>
</table>
Why is destination marketing critical?
## The need for destination promotion

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Solution: Destination Promotion</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 The visitor economy is fragmented</td>
<td>Provides the scope and strategic vision supporting a wide array of individual businesses</td>
</tr>
<tr>
<td>2 The primary motivator of a trip is usually the experience of a destination, beyond the offerings of one business</td>
<td>Articulates the brand message that is consistent with consumer motivations</td>
</tr>
<tr>
<td>3 Effective marketing requires scale to reach potential visitors</td>
<td>Pools sustained resources to provide the economies of scale and marketing infrastructure required to generate impact</td>
</tr>
</tbody>
</table>
Travel sector jobs outpacing economy

Employment by Industry in California
2001=100

- Lodging & Food
- Arts & Rec
- Total
... also true for personal income

**Earned Income by Industry in California**

2001=100

- Total
- Lodging & Food
- Arts & Rec

Source: BEA, Tourism Economics
Market headwinds and opportunity
Market volatility has damaged confidence
Emergers are no longer driving growth

Advanced Economies and EMs: GDP

Source: Oxford Economics/Haver Analytics
OE Emerging Markets GDP growth forecasts

Source: Oxford Economics/Haver Analytics
Brazil: Worst recession in a century

Brazil: GDP per capita (PPP terms)

Source: Oxford Economics
U.S. has become much more expensive

Exchange rate depreciation, 2016 / 2014

<table>
<thead>
<tr>
<th>Country</th>
<th>Depreciation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Russia</td>
<td>-52%</td>
</tr>
<tr>
<td>Brazil</td>
<td>-46%</td>
</tr>
<tr>
<td>Argentina</td>
<td>-42%</td>
</tr>
<tr>
<td>Colombia</td>
<td>-40%</td>
</tr>
<tr>
<td>Mexico</td>
<td>-23%</td>
</tr>
<tr>
<td>Australia</td>
<td>-23%</td>
</tr>
<tr>
<td>Chile</td>
<td>-22%</td>
</tr>
<tr>
<td>Canada</td>
<td>-21%</td>
</tr>
<tr>
<td>Euro</td>
<td>-20%</td>
</tr>
<tr>
<td>Japan</td>
<td>-15%</td>
</tr>
<tr>
<td>S Korea</td>
<td>-13%</td>
</tr>
<tr>
<td>China</td>
<td>-9%</td>
</tr>
<tr>
<td>India</td>
<td>-7%</td>
</tr>
</tbody>
</table>

Source: Tourism Economics
U.S.: Halting growth but promising expectations

US: Real GDP growth

Source: Oxford Economics
Leading indicators suggest slowing

March Domestic and International Travel Index
Index (>50=expansion, <50=decline)

Source: Oxford Economics, U.S. Travel Association
Still, air arrivals showing resilience

YTD growth for air arrivals in the US, Feb-16
Annual % change, YTD

Source: Tourism Economics, APIS
Base of international travelers is expanding

**Traveling Class Household Volumes**

Households with income over $20,000 per annum, millions

- **Developed**
- **BRICS**
- **Other Emerging**

<table>
<thead>
<tr>
<th>Year</th>
<th>Developed</th>
<th>BRICS</th>
<th>Other Emerging</th>
</tr>
</thead>
<tbody>
<tr>
<td>2004</td>
<td>324</td>
<td>40</td>
<td>88</td>
</tr>
<tr>
<td>2014</td>
<td>366</td>
<td>143</td>
<td>145</td>
</tr>
<tr>
<td>2024</td>
<td>394</td>
<td>272</td>
<td>232</td>
</tr>
</tbody>
</table>

Source: Oxford Economics
Travelers are more connected than ever before

Changes in direct routes and connectivity per head, 2011 - 2015

Lat Am: 25.2% % Change in direct routes 29.5% % Change in direct routes per head
Asia: 17.7% 21.0% 12.2% 13.7% 5.8% 6.7% 5.1% 8.8%
E Eur: 2.2% 6.7% 5.1% 8.8%
W Eur: -0.1% 2.2%
Global: -1.7% 3.3%
N Am: -8.7% -3.0% 3.3%
Oceania: -14.6% -7.9%
Africa: -20 -10 0 10 20 30 40 % change

Source: Tourism Economics, OAG
Historic Visit California Returns
Solid track record

Visit California ROI over time
Projected visitor spending per dollar advertising

Source: SMARI, Visit California
Forecasting Returns
Projected investments

Visit California Advertising Budgets
$ million

- Incremental
- Base

- 14/15
- 15/16
- 16/17
- 17/18

Tourism Economics
Comparison of ROI measures
Projected visitor spending per dollar advertising

- TE assumptions
- Average of last 3 years
- Latest (2015)

Conservative ROI potential applied
Returns grow with infrastructure and branding

Average ROI Visit on California Advertising
Projected visitor spending per dollar advertising

- 15/16: 163
- 16/17: 196
- 17/18: 225
2015/16 Market Investment Allocation

$ millions

- US: $31
- Canada: $2.8
- UK: $4.3
- Aus: $2.6
- Mexico: $2.3
- China: $5.9
- Brazil: $1.2
- Other (PR and travel): $0.9

Allocation informed by TE model
Returns based on market-by-market analysis

Visit California Advertising Returns
$ million visitor spending

- Incremental
- Base

15/16: Incremental 8,000, Base 4,000
16/17: Incremental 9,000, Base 5,000
17/18: Incremental 12,000, Base 6,000

Tourism Economics
Largest returns from U.S.

Visit California Advertising Returns
$ million visitor spending

Source: Visit California
Tracking progress so far

Visit California Advertising Returns
$ million visitor spending

Ahead of plan

Visit California Advertising Returns
$ million visitor spending

Plan (2015/16)
- China
- UK
- Canada
- US

Actual (2015)
- China
- UK
- Canada
- US
‘Pathway to Prosperity’

- Fall 2016: Visit California program ROI
- May 2017: Visit California ‘Silver’ 25th Anniversary celebration
- June 2019: IPW returns to California
- Fall 2019: Industry referendum
Legislative Reception
March 2  |  Sacramento
Every day is a holiday: California's tourism economy kept growing last year

Los Angeles Times
Visitors to Los Angeles County spent a record $20.6 billion in 2015

Los Angeles Daily News
Here's what's driving California's strong travel, tourism business

The Sacramento Bee
Travelers to California spent a record $122.5 billion in 2015

Santa Monica Mirror
California Legislature Declares May 'Travel and Tourism Month'

Bay Area biztalk
Bay Area booms as tourism roars and billions are invested locally
California Tourism Month Resolution

California Travel and Tourism Month

Whereas, Travel and tourism is an important engine for economic growth and well-being in California and throughout the nation as the world's most visited state and the world's eighth largest economy, including positive economic impacts, excellent job opportunities, and cultural experiences; and

Whereas, The California Visitors and Convention Bureau (CVB), a member of the California Tourism Board (CTB), works to promote tourism in California and collaborate with the California legislature to create opportunities for tourism growth and development; and

Whereas, California Tourism Month is an opportunity to highlight the importance of tourism to the state's economy and quality of life, and to celebrate the contributions of tourism to California's culture and identity; and

Whereas, This resolution is consistent with the State Constitution's mandate to promote tourism and economic development in California.

NOW, THEREFORE, BE IT RESOLVED by the California Legislature, by and with the advice and consent of the Governor, that this resolution be adopted and is hereby adopted as the official declaration of the California Travel and Tourism Month.
James Bermingham

Vice Chair of Marketing

Visit California
Roll call
Feb. 24, 2016
meeting minutes
Opening Remarks
Committee meetings since February

- Research Committee 4/28
- Brand Content Committee 5/3
- International Committee 5/9
- Public Relations Committee 5/12
Today’s Deliverables

- FY16-18 Marketing Work Plan
- FY15/16 Marketing Highlights
- FY15/16 Communications Update
- FY16/17 Media Update
- FY16/17 Budget Discussion and Vote
CEO Marketing Report
Dream Big Dividend
Work Plan

FY16/17 & 17/18
Target Audiences

Strategic Framework

Global Brand Target
Adults 18+, Top 33% HHI, Travel Passion

Family Opportunity Target
Kids in HH

Super Affluent Opportunity Target
$250K HHI

California Experiences
Outdoor, Culinary, Entertainment, Culture, Luxury
Shifting demographics require communicating to all three generations.

**U.S. VACATION TRAVELERS**
The number of Millennial vacation travelers has now exceeded the number of Boomer travelers.

- Millennials: 33.4M
- Gen-X: 21.6M
- Boomers: 32.6M

**U.S. FAMILY VACATION TRAVELERS**
Millennials have surpassed Gen-X in the number of family travelers.

- Millennials: 14.3M
- Gen-X: 12.8M
- Boomers: 6.8M

**U.S. AFFLUENT* VACATION TRAVELERS**
Millennials are almost tied with Gen-X in the number of super affluent travelers.

- Millennials: 1.0M
- Gen-X: 1.1M
- Boomers: 1.7M

*HII $250+
Source: MRI 2015
Millennial visitation to California surpasses other generations

**Domestic Leisure Visitors to California by Generation**

<table>
<thead>
<tr>
<th>Generation</th>
<th>Millennials</th>
<th>Gen-X</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Millennials</td>
<td>42%</td>
<td>24%</td>
<td>34%</td>
</tr>
</tbody>
</table>

Source: MRI 2015

**International Leisure Visitors to California by Generation & Country**

<table>
<thead>
<tr>
<th>Country</th>
<th>Millennials</th>
<th>Gen-X</th>
<th>Boomers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Italy</td>
<td>52%</td>
<td>32%</td>
<td>15%</td>
</tr>
<tr>
<td>Germany</td>
<td>49%</td>
<td>33%</td>
<td>19%</td>
</tr>
<tr>
<td>Brazil</td>
<td>48%</td>
<td>34%</td>
<td>19%</td>
</tr>
<tr>
<td>Australia</td>
<td>47%</td>
<td>34%</td>
<td>20%</td>
</tr>
<tr>
<td>France</td>
<td>47%</td>
<td>29%</td>
<td>24%</td>
</tr>
<tr>
<td>Mexico</td>
<td>45%</td>
<td>38%</td>
<td>17%</td>
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<tr>
<td>S. Korea</td>
<td>42%</td>
<td>38%</td>
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<tr>
<td>China</td>
<td>40%</td>
<td>48%</td>
<td>12%</td>
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<tr>
<td>India</td>
<td>28%</td>
<td>26%</td>
<td>46%</td>
</tr>
<tr>
<td>Japan</td>
<td>27%</td>
<td>42%</td>
<td>31%</td>
</tr>
</tbody>
</table>

Source: CIC 2014 (Canada not available)
Connecting with a broader culture

An omnicultural approach allows brands to resonate with consumers beyond demographics by aggregating people based on INTERESTS/PASSIONS/TRUEHS
Consumers are looking to their favorite social media influencers for advice, often following those who align with their personal aesthetics and lifestyle aspirations.

**INFLUENCERS PROVIDE**

Trust • Authenticity • Personal Interaction
Insight Into What’s Cool & Trendy

Influencer content can lift brand familiarity **88% more** than content directly from the brand.

**Source:** Nielsen

---

**RECOMMENDATIONS FROM A TRUSTED SOURCE ARE 50% MORE LIKELY TO LEAD TO A CONVERSION...**

 Consumers are now looking to their favorite bloggers, vloggers (video bloggers), Instagrammers and YouTubers for their next travel adventure inspiration.

**Source:** McKinsey
FY15/16
Marketing Highlights
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

**California Experiences**
Outdoor, Culinary, Entertainment, Culture, Luxury
Brand campaign components

**TV/OTV Commercials**
- “Average Joes”
- “Kids Unplugged”

**Digital Video Content**
- DREAM 365 TV
- CALIFORNIA DREAMERS
- YouTube

**Foundational Digital**

**New Multi-Channel Initiatives**
- **Super Affluent** – California Laid Back Luxury Campaign
- **Outdoor** – “Catch the Winter Wave”
- **Family** – Ultimate Family Playground
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

California Experiences
Outdoor, Culinary, Entertainment, Culture, Luxury
Family Profile

Mommy Maximus
Program objectives

Drive incremental travel to California (overarching)

- Increase awareness and affinity for California as the ‘ultimate family playground’
- Showcase abundance of family activities in the state
- Deepen connection between target audience and brand through rich, engaging digital content
Media partners

Time Inc.
- Content development
- Global social promotion
- Native distribution

WhoSay
- Celebrity influencers
- Content development
- Global social promotion

National Geographic
- Influencer blog/trip
- Content development
- Global social promotion
Family influencers

Nia Long
Heather Greenwood Davis
Pattie Cordova
Ali Landry
Justine Howell
Brandi Jeter Riley

Social reach: 5+ million
Campaign summary

**TARGET AUDIENCE**
- Mommy Maximus
  - 25+ with children 2-12
  - Propensity to travel
  - HHI of $75K+

**GEOGRAPHY**
- United States
- Canada
- Australia
- United Kingdom
- Mexico

**BUDGET & DELIVERY**
- Budget: $1.5M
- 76.2M projected impressions

**PROGRAM MEASUREMENT**
- Impressions
- Content views
- Social impressions, engagement
Family timeline

JANUARY 2016
• Review approach with Brand/Content Committee

FEBRUARY – MARCH 2016
• Media details finalized

MAY 2016
• Content production
• Celebrity influencer trips
• National Geographic program launches

JUNE 2016
• Time Inc. program launches
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

California Experiences
Outdoor, Culinary, Entertainment, Culture, Luxury
Luxury Profile

The Confident Connoisseur
Program objectives

| Generate awareness and affinity amongst high-end Super Affluent travelers for California’s distinctive approach to luxury – ‘Laid-Back Luxury’ | Develop an integrated, multi-channel content program that reaches this distinctive and discerning audience in key global markets |
Media partners

Time Inc.

FORTUNE  TRAVEL+LEISURE  DEPARTURES

CONDÉ NAST

bon appétit  THE NEW YORKER

CONDÉ NAST  Traveler  VANITY FAIR
Super Affluent influencers

Tyler Florence
Annie Lawless
Giada De Laurentiis

Social reach: 4+ million
Campaign summary

TARGET AUDIENCE
Confident Connoisseur
• $250K+ HHI

GEOGRAPHY
• United States
• Canada
• United Kingdom

BUDGET & DELIVERY
• Budget: $3.0M
• 90.1M projected impressions

PROGRAM MEASUREMENT
• Impressions
• Content Views
• Time spent with content
Super Affluent timeline

**DECEMBER 2015**
• Reviewed first media recommendation

**FEBRUARY 2016**
• Reviewed initial creative approach

**MAY 2016**
• Ambassadors Selected

**FEBRUARY - APRIL 2016**
• Media details finalized

**JUNE-JULY 2016**
• Content production
• U.K Luxury Showcase (London)

**AUGUST 2016**
• CAMPAIGN LAUNCH

**DECEMBER 2016**
• ILTM (Cannes, France)
Dave Mering

CEO & Founder

MeringCarson
Television Creative
Living the Dream
RASHIDA: People think Californians are “Living the Dream.”
JEFF: But the reality is far less glamorous, man.
SPELUNKER: We have deep, dark secrets...
KEVIN: and struggles.
VITNER: Things can get pretty old.
JONNY: Sooo dull.
MAGIC: There’s just no magic.
MAN: A dream, this?
WOMAN: More like a nightmare.
TYLER: Yep, life out here is pretty predictable.
GEORGE: The sun rises every morning
WOMAN: And sets every night.
SURFER: Still think Californians are living the dream?
FERGIE: Come on out. We’ll set the record straight
VO: Kick off your California vacation at visitcalifornia.com
Welcome to Kidifornia
BOY: Welcome to Kidifornia – it’s a great place to take your parents.
TWEEN: But, there’s things you gotta know first.
CHLOE: It’s best to schedule lots of activities.
GIRL: And naps.
BOY: They get cranky.
TWEEN: Never let them out of your sight!
BOY: Ever!
GIRL: Sometimes they can be a little...weird.
TWEEN: Totally weird.
BOY: But you just gotta let parents be parents.
BOY: After all, it’s pretty exciting for them.
TWEEN: They don’t get to do this stuff every day.
BOY: So bring 'em on out.
GIRL: Because their smiles make it all worth it.
VO: Kick off your California family vacation at visitcalifornia.com

#kidifornia
FY15/16 Content Highlights

FY16/17 Creative Preview
Content investment

<table>
<thead>
<tr>
<th>Year</th>
<th>TV</th>
<th>ONLINE TV</th>
<th>OTHER VIDEO</th>
<th>Total Videos</th>
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<tbody>
<tr>
<td>FY12/13</td>
<td>$0M</td>
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<td>FY13/14</td>
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<td>FY14/15</td>
<td>$10M</td>
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<td>42 videos</td>
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<tr>
<td>FY15/16</td>
<td>$30M</td>
<td></td>
<td></td>
<td>92 videos</td>
</tr>
</tbody>
</table>
71 MILLION GLOBAL VIEWS

213 YEARS OF CONSUMPTION

(SINCE LAUNCHING IN MARCH 2015)
Road Trip 2016!
Crowdsourcing kicks off June 1
Hero, hub, ‘how do?’

HERO
Inspiring, conveys the California Lifestyle

HUB
Vertical content around locations and topics based on needs-mapping, California 101 Series

HOW DO...?
Detailed content designed around long tail of search terms, provides potential travelers the detailed information they need to finalize planning

CALIFORNIA DREAMERS

DREAM EATER

CALIFORNIA 101

ADVENTUROUS DAUGHTER TRIPS

WHALE WATCHING

SUPER BLOOM
Industry input
Public Relations
MasterChef Australia

Reach: 1.2 million avg. per episode
Total value: $5 million
Experience California Boot Camp
Austin, Texas  |  12 destinations
Time Editors Dinner
Global Entertainment
Press Trip

Traditional media and digital influencers

- United Kingdom
- Australia
- Canada
- Mexico
- Brazil
- South Korea
Sponsor Update
Greg Carson
Partner & Chief Creative Officer
MeringCarson
Using cultural trends & ideologies to build brands
Tapping into cultural tensions

Different & varying points of view that give rise to cultural shifts

Brands with purpose & unique POV can tap into these
PUTTING IT INTO PRACTICE

REI

REI STORES ARE CLOSING ON BLACK FRIDAY

THE OUTDOORS, AND THE WEBSITE, ARE ALWAYS OPEN. #OPTOUTSIDE

Join us outside
1.4M social participants

Web traffic
UP 10%
on Thanksgiving

Support from
150 other organizations

UP 26%
on Black Friday
Roughly 6 years ago, Lodi was left off a map of California Wine Regions... soon after they asked MeringCarson for help.
CHANGING THE CONVERSATION

THE ASK:
New brand campaign

OUR SOLUTION:
New brand
Cultural tension & crowd culture surrounding wine

Rejection of the intimidating, traditional rules of wine
LoCA challenges that tension & provides new way of thinking

Approachable, everyday wine experience…

willing to poke fun at itself & the category
Sure, we have a few Loose Corkscrews.

When your every waking thought is consumed by aging and oaking, blending and pairing, barrel after barrel, taste after taste, it’s easy to get a little loopy. Yeah, wine is a bit all consuming in Lodis. What can we say we’re LoCA.

LoCA THE WINGS OF LODI CALIFORNIA

lodiwine.com

Crazy can come by the Barrel

That’s right. Around here, fun is measured by the gallon, not the calendar. Good times leached by the cistern and an obsession with quality wine spans the map. Yeah, wine is a bit all consuming in Lodis. What can we say, we’re LoCA.

LoCA THE WINGS OF LODI CALIFORNIA

lodiwine.com
Fast forward to 2015

Now Lodi is on the map
CAMPAIGN EVOLUTION

From We’re LoCA (brand-centric) to Go LoCA (consumer-centric)…

Inviting consumers to live the LoCA lifestyle & values
What does this mean for Visit California?
Visit California has always approached the category differently

California Attitude
Living life to the fullest
If you can dream it, you can do it in California.
Visit California cultural tension insight

“People don’t truly live”

QUALITY OF LIFE

“Many young professionals are willing to sacrifice a portion of their salary in exchange for a career move that more closely aligns with their values or passions or improves their work/life balance.”

Source: Business Wire, Berkshire Hathaway
Moving forward

Living the Dream
Dreaming = Imagining & Aspiring

Living = Doing
Thank you
Global Paid Media Overview
## Paid media initiatives, targets

<table>
<thead>
<tr>
<th>GLOBAL</th>
<th>FAMILY</th>
<th>SUPER AFFLUENT</th>
<th>CULINARY EXPERIENCE TARGET</th>
<th>OUTDOOR EXPERIENCE TARGET</th>
<th>FOUNDATIONAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>A18+, Highest income distribution, Passionate about/regularly travel</td>
<td>A18+, Highest income distribution, Passionate about/regularly travel, Children in HH</td>
<td>A18+, Passionate about/regularly travel, HHI $250K+</td>
<td></td>
<td></td>
<td>Global + Experience Targets (outdoor, culinary, entertainment/culture, family, luxury)</td>
</tr>
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<td>✓</td>
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</tr>
</tbody>
</table>
Global Brand Target  
**Total Spend:** $18.7M

**Television**
- National Cable
- Video-on-Demand
- Live Event TV in Prime Time
- Budget: $14.7M
- Impressions: 1.78B
- Timing: Fall, Spring

**Online TV**
- High-Profile, Premium Placements
- High Share-of-Voice Sponsorships & Takeovers
- Budget: $3.1M
- Impressions: 42M
- Timing: Fall, Spring

**Online Video**
- Native, Video, Social
- Budget: $900K
- Impressions: 200M
- Timing: Fall, Winter, Spring

**Family Opportunity Target**
- National Cable & Online TV — Co-Viewing Programming
- Native, Video, Banners, Social
- Budget: $7M
- Impressions: 772.3M
- Timing: Fall, Spring

**Super Affluent Opportunity Target**
- Brand Ambassador-Led Native, Print, Video, Social
- Budget: $2.25M
- Impressions: TBD
- Timing: Fall, Winter, Spring

**Culinary Experience Target**
- Native, Banners, Video, Social
- Budget: $950K
- Impressions: 14M
- Timing: Fall, Winter, Spring

**Outdoor Experience Target**
- Native, Banners, Video, Social
- Budget: $400K
- Impressions: TBD
- Timing: Winter

**Year-Round Foundational Support — All Audiences**
- **Traffic-Driving Banners**
  - Budget: $500K
  - Impressions: 200M
- **Search Engine Marketing (Google)**
  - Budget: $450K
  - Impressions: 87.6M
- **Spotted Social Posts**
  - Budget: $1M
  - Impressions: 100M
Global Brand Target

TOTAL SPEND: $1.5M

TELEVISION
- National Cable
- Custom Integration with El Canada
  - Budget: $550.7K
  - Impressions: 49.2M
  - Timing: Fall, Spring

ONLINE TV
- High-Profile, Premium Placements
- High Share-of-Voice Sponsorships & Takeovers
  - Budget: $329K
  - Impressions: 25.1M
  - Timing: Fall, Winter, Spring

ONLINE VIDEO
- Native, Video, Social
  - Budget: $300K
  - Impressions: 4M
  - Timing: Fall, Winter, Spring

OUT-OF-HOME (TORONTO)
- High-Impact Digital Boards
  - Budget: $298.5K
  - Impressions: 2.8M
  - Timing: February

Family Opportunity Target
- National Cable & Online TV — Co-Viewing Programming
- Native, Video, Banners, Social
  - Budget: $571.4K
  - Impressions: 32M
  - Timing: Fall, Spring

Super Affluent Opportunity Target
- Brand Ambassador-Led Native, Print, Video, Social
  - Budget: $219.1K
  - Impressions: TBD
  - Timing: Fall, Winter, Spring

Culinary Experience Target
- Native, Banners, Video, Social
  - Budget: $275K
  - Impressions: 4M
  - Timing: Fall, Winter, Spring

Year-Round Foundational Support — All Audiences

TRAFFIC-DRIVING BANNERS
- Budget: $175K
- Impressions: 9M

SEARCH ENGINE MARKETING (GOOGLE)
- Budget: $125K
- Impressions: 25M

SPONSORED SOCIAL POSTS
- Budget: $125K
- Impressions: 13M
Global Brand Target  TOTAL SPEND: $3M

TELEVISION
- National Cable
  - Budget: $2.1M
  - Impressions: 27M
  - Timing: Winter, Spring

ONLINE TV
- High-Profile, Premium Placements
  - Budget: $200.1K
  - Impressions: 2.1M
  - Timing: Winter, Spring
- High Share-of-Voice Sponsorships & Takeovers
  - Budget: $280K
  - Impressions: 18M
  - Timing: Fall, Winter, Spring

ONLINE VIDEO
- Native, Video, Social
  - Budget: $280K
  - Impressions: 18M
  - Timing: Fall, Winter, Spring

OUT-OF-HOME (LONDON)
- Geo-Targeted, High-Impact Digital Boards; London Underground
  - Budget: $327.6K
  - Impressions: 16.4M
  - Timing: February

Family Opportunity Target
- Online TV — Co-Viewing Programming
  - Budget: $386.1K
  - Impressions: 8.4M
  - Timing: Winter, Spring
- Digital: Native, Video, Banners, Social

Super Affluent Opportunity Target
- Brand Ambassador-Led Native, Print, Video, Social
  - Budget: $295.7K
  - Impressions: TBD
  - Timing: Fall, Winter, Spring

Year-Round Foundational Support — All Audiences

TRAFFIC-DRIVING BANNERS
- Budget: $200K
  - Impressions: 62M

SEARCH ENGINE MARKETING (GOOGLE)
- Budget: $150K
  - Impressions: 28M

SPONSORED SOCIAL POSTS
- Budget: $150K
  - Impressions: 15M
Global Brand Target

**TELEVISION**
- Spot Markets: Sydney, Melbourne, Brisbane
  - Budget: $1M
  - Impressions: 120M
  - Timing: Winter, Spring

**ONLINE TV**
- High-Profile, Premium Placements
- High Share-of-Voice Sponsorships & Takeovers
  - Budget: $141.3K
  - Impressions: 2.1M
  - Timing: Winter, Spring

**ONLINE VIDEO**
- Native, Video, Social
  - Budget: $250K
  - Impressions: 66M
  - Timing: Fall, Winter, Spring

**OUT-OF-HOME/CINEMA (SPOT MARKETS)**
- High-Impact Digital Boards
  - Budget: $211K
  - Impressions: 65M
  - Timing: February
- In Theater, Screening Event
- Budget: $211K
  - Impressions: 65M
  - Timing: February

**Family Opportunity Target**
- Online TV – Co-Viewing Programming
- Native, Video, Banners, Social
  - Budget: $335.5K
  - Impressions: 900K
  - Timing: Winter, Spring

**Culinary Experience Target**
- Native, Banners, Video, Social
  - Budget: $150K
  - Impressions: 85M
  - Timing: Fall, Winter, Spring

---

**Year-Round Foundational Support – All Audiences**
- **TRAFFIC-DRIVING BANNERS**
  - Budget: $200K
  - Impressions: 16M

- **SEARCH ENGINE MARKETING (GOOGLE)**
  - Budget: $150K
  - Impressions: 30M

- **SPONSORED SOCIAL POSTS**
  - Budget: $150K
  - Impressions: 14M
Global Brand Target  
TOTAL SPEND: $5.5M

**TELEVISION**
- Spot Markets: Beijing, Shanghai, Guangzhou
  - Budget: $1.8M
  - Impressions: 111M
  - Timing: Spring

**ONLINE TV**
- Spot Markets: Beijing, Shanghai, Guangzhou, Shenzhen, Chengdu
  - High-Profile, Premium Placements
  - High Share-of-Voice Sponsorships & Takeovers
  - Budget: $3M
  - Impressions: 163.8M
  - Timing: Spring

**ONLINE VIDEO**
- Native, Video, Banners, Social
  - Budget: $300K
  - Impressions: 27M
  - Timing: Spring

**OUT-OF-HOME (SHANGHAI)**
- High-Impact Digital Boards
  - Budget: $393.5K
  - Impressions: 3M
  - Timing: April/May

---

**Year-Round Foundational Support — All Audiences**

**TRAFFIC-DRIVING BANNERS**
- Budget: $500K
  - Impressions: 153M

**SEARCH ENGINE MARKETING (BAIDU)**
- Budget: $250K
  - Impressions: 169M

**KOL-LED, FLIGHTED SOCIAL POSTS**
- Budget: $300K
  - Impressions: 675M
Global Brand Target

**TOTAL SPEND: $1.3M**

**TELEVISION**
- National
- **Budget: $983.3K**
- Impressions: **48M**
- Timing: Spring

**ONLINE TV**
- High-Profile, Premium Placements
- High Share-of-Voice Sponsorships & Takeovers
- **Budget: $285.7K**
- Impressions: **22M**
- Timing: Spring

**Family Opportunity Target**
- Online TV — Co-Viewing Programming
- Native, Video, Banners, Social
- **Budget: $593.7K**
- Impressions: **14.8M**
- Timing: Spring

---

**Year-Round Foundational Support — All Audiences**

**TRAFFIC-DRIVING BANNERS**
- **Budget: $227.3K**
- Impressions: **50.4M**

**SEARCH ENGINE MARKETING (GOOGLE)**
- **Budget: $125K**
- Impressions: **26M**

**SOCIAL**
- **Budget: $125K**
- Impressions: **13M**
Year-Round Foundational Support — All Audiences

**Brazil**
- **TOTAL BUDGET:** $250,000
- **TOTAL IMPRESSIONS (EST.):** 46M
  - **SEARCH ENGINE MARKETING (GOOGLE):**
    - Budget: $125K
    - Impressions: 33M
  - **SOCIAL:**
    - Budget: $125K
    - Impressions: 13M

**Germany**
- **TOTAL BUDGET:** $250,000
- **TOTAL IMPRESSIONS (EST.):** 46M
  - **SEARCH ENGINE MARKETING (GOOGLE):**
    - Budget: $125K
    - Impressions: 33M
  - **SOCIAL:**
    - Budget: $125K
    - Impressions: 13M

**France**
- **TOTAL BUDGET:** $300,000
- **TOTAL IMPRESSIONS (EST.):** 45M
  - **SEARCH ENGINE MARKETING (GOOGLE):**
    - Budget: $150K
    - Impressions: 30M
  - **SOCIAL:**
    - Budget: $150K
    - Impressions: 15M

**Japan**
- **TOTAL BUDGET:** $200,000
- **TOTAL IMPRESSIONS (EST.):** 35M
  - **SEARCH ENGINE MARKETING (GOOGLE):**
    - Budget: $100K
    - Impressions: 25M
  - **SOCIAL:**
    - Budget: $100K
    - Impressions: 10M

**South Korea**
- **TOTAL BUDGET:** $150,000
- **TOTAL IMPRESSIONS (EST.):** 23M
  - **SEARCH ENGINE MARKETING (GOOGLE):**
    - Budget: $75K
    - Impressions: 15M
  - **SOCIAL:**
    - Budget: $75K
    - Impressions: 8M
FY16/17 Proposed Budget Discussion
<table>
<thead>
<tr>
<th></th>
<th>FY15/16 Budget</th>
<th>Proposed FY16/17 Budget</th>
<th>$ Difference</th>
<th>% Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Revenue</strong></td>
<td></td>
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<tr>
<td>Accommodations</td>
<td>$38,864,591</td>
<td>$39,226,990</td>
<td>$362,399</td>
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<td>Attractions</td>
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<td>1,845,869</td>
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<td>Co-op Partnerships</td>
<td>4,490,290</td>
<td>3,294,206</td>
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<td>Interest</td>
<td>210,149</td>
<td>200,000</td>
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<td>Prior Year</td>
<td>1,437,398</td>
<td>4,300,000</td>
<td>$2,862,602</td>
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<td>Rental Car</td>
<td>60,571,961</td>
<td>59,515,479</td>
<td>-$1,056,482</td>
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<tr>
<td>Restaurant/Retail</td>
<td>6,046,115</td>
<td>6,167,037</td>
<td>$120,922</td>
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<td>State Funding</td>
<td>200,000</td>
<td>200,000</td>
<td>$0</td>
<td>0.00%</td>
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<td>Transportation</td>
<td>1,162,543</td>
<td>1,166,325</td>
<td>$3,782</td>
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<tr>
<td>Unrealized Investment Gain/Loss</td>
<td>-41,862</td>
<td>0</td>
<td>$41,862</td>
<td>-100.00%</td>
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<td>Voluntary and Other Misc. Income</td>
<td>22,195</td>
<td>20,000</td>
<td>-$2,195</td>
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<tr>
<td><strong>Total Revenue</strong></td>
<td>$114,559,249</td>
<td>$115,935,906</td>
<td>$1,376,657</td>
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<td>Budget Line</td>
<td>Approved FY15/16 Budget</td>
<td>Proposed FY16/17 Budget</td>
<td>$ Difference</td>
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<td>---------------------------</td>
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<td>$11,517,137</td>
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<td>Assessment</td>
<td>807,485</td>
<td>700,000</td>
<td>-107,485</td>
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<td>Global Brand</td>
<td>68,482,547</td>
<td>70,287,821</td>
<td>1,805,274</td>
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<td>Global Digital</td>
<td>1,697,047</td>
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<td>-397,047</td>
<td>-23%</td>
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<td>Global Consumer Co-op</td>
<td>4,173,151</td>
<td>2,000,000</td>
<td>-2,173,151</td>
<td>-52%</td>
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<td>Global Content</td>
<td>5,318,274</td>
<td>4,350,000</td>
<td>-968,274</td>
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<td>Global Travel Trade</td>
<td>1,579,671</td>
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<td>420,329</td>
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<td>Global Research</td>
<td>1,361,900</td>
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<td>International Marketing</td>
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<td>810,256</td>
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<td>999,585</td>
<td>171,643</td>
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<td>219,421</td>
<td>11%</td>
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<td><strong>Total Expenses</strong></td>
<td><strong>$114,559,249</strong></td>
<td><strong>$115,935,906</strong></td>
<td><strong>$1,376,657</strong></td>
<td><strong>1.20%</strong></td>
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<td>Budget Line</td>
<td>Approved FY16/16 Budget</td>
<td>Proposed FY16/17 Budget</td>
<td>$ Difference</td>
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<td>------------------</td>
<td>-------------------------</td>
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<tr>
<td>United Kingdom</td>
<td>$6,765,941.00</td>
<td>$5,940,000.00</td>
<td>-$825,941.00</td>
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<td>Japan</td>
<td>1,254,889</td>
<td>1,200,000</td>
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<tr>
<td>Germany</td>
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<td>Australia</td>
<td>4,410,000</td>
<td>4,102,000</td>
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<td>Canada</td>
<td>3,891,811</td>
<td>3,969,131</td>
<td>77,320</td>
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<td>Mexico</td>
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<td>3,240,000</td>
<td>-$329,081</td>
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<td>South Korea</td>
<td>925,000</td>
<td>950,000</td>
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<td>China</td>
<td>8,712,047</td>
<td>8,543,029</td>
<td>-$169,018</td>
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<td>France</td>
<td>1,150,620</td>
<td>1,100,000</td>
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<tr>
<td>Brazil</td>
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<tr>
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<tr>
<td>Scandinavia</td>
<td>250,000</td>
<td>250,000</td>
<td>0</td>
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<td><strong>Total International Media &amp; Trade</strong></td>
<td><strong>35,424,236</strong></td>
<td><strong>32,244,160</strong></td>
<td><strong>-3,180,076</strong></td>
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</tbody>
</table>
Vote
FY16/17 Budget
Agenda Items for Future Meetings
Adjourn Marketing Advisory Committee
FY16/17 Budget
Vote
FY16/17 Budget
Upcoming Events
China CEO Mission

May 17-26, 2016

Mike Gallagher
Scott White
James Bermingham
Ed Fuller
Sima Patel
Joe Terzi
Misti Kerns
Andy Wirth
Dennis Quinn
Clay Gregory
Chuck Davison
Kathy Janega-Dykes
CALIFORNIA CAUCUS
12:30-2 p.m.
June 18

CALIFORNIA DREAMIN’ TOUR
5:30-7 p.m.
June 20
Anaheim!

IPW returns to California: June 1-5, 2019
Fall Board Meeting
Oct. 14 | Beverly Hills
2017 Outlook Forum & Winter Board Meeting
Feb. 27–March 1, 2017
Santa Barbara
Agenda Items for Future Meetings
Public Comment
Adjournment