

# California Agritourism Summit

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**Visit California**

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A wooden dock made of light-colored planks extends from the bottom center towards the middle of the frame, leading into a large, calm body of water. The water is a deep blue-green color with gentle ripples. In the background, a line of lush green trees and some houses are visible under a clear, bright blue sky. The overall scene is peaceful and scenic.

**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  
50<sup>th</sup> ANNIVERSARY

CityPASS

Hertz



Wolfgang Puck



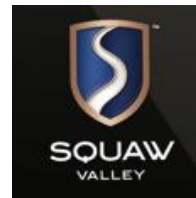
FAT'S<sup>®</sup>  
FAMILY OF RESTAURANTS  
FINE ASIAN & AMERICAN DINING



RODNEY STRONG  
Vineyards



PEBBLE BEACH  
COMPANY



RH  
RIDGEMONT  
HOSPITALITY

Fairmont  
HOTELS & RESORTS



Mammoth



Martin Resorts

Montage

Marriott

**\$117 BILLION**  
**IN REVENUE**



Tier 1

Tier 2

Tier 3



# 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



# STRATEGIC FRAMEWORK



# 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%**

A close-up photograph of a branch of pink cherry blossoms. The flowers are in various stages of bloom, with some fully open and others as buds. The background is a soft, out-of-focus bokeh of green and yellow light, suggesting a bright, sunny day. The text is overlaid on the left side of the image.

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

California  
dream  
big







Culinary



Family



Outdoor



Luxury



Entertainment

# Culinary as a Trip Driver

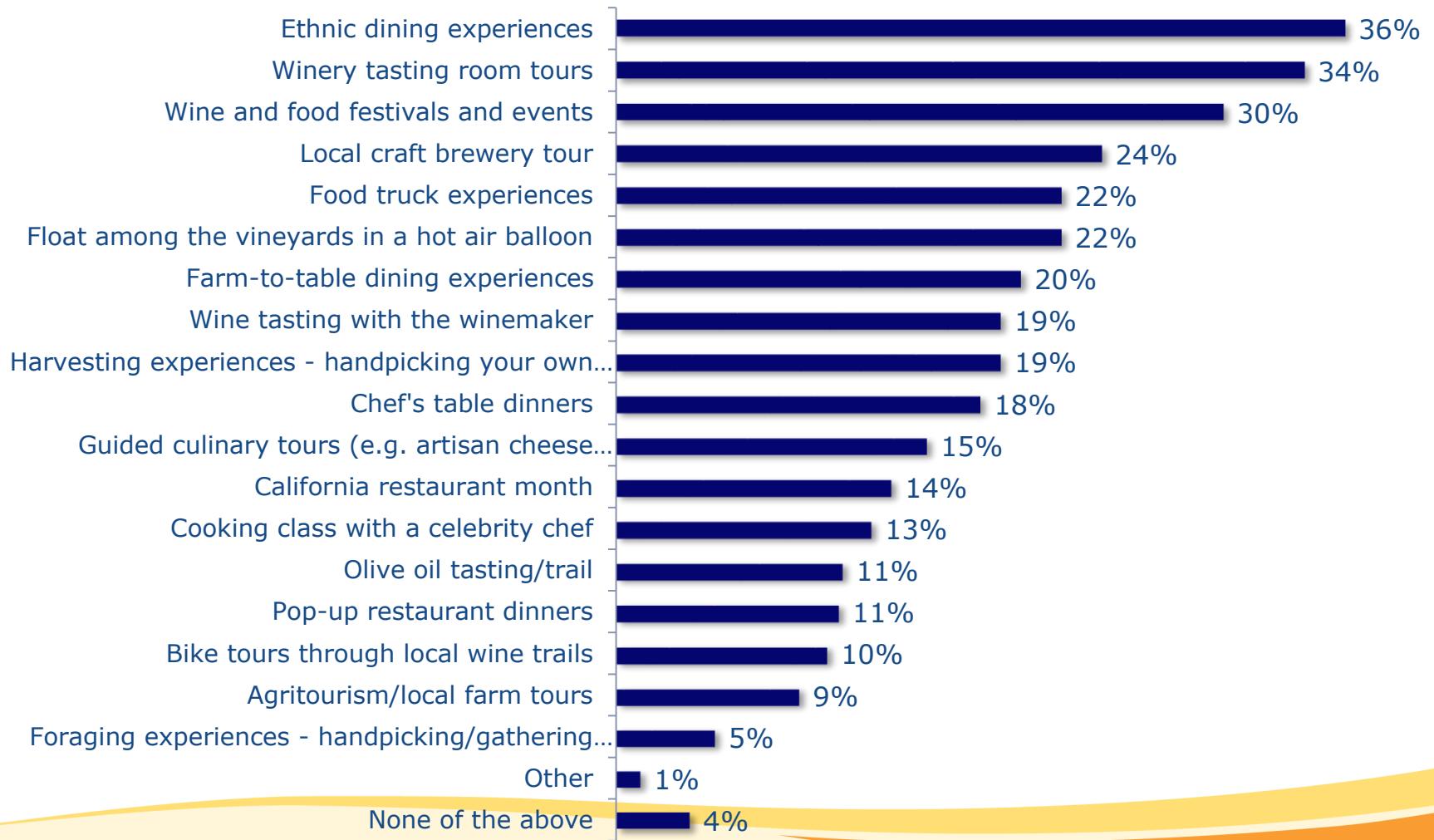
\$29.6 billion - Total visitor spending on Food & Wine in 2013

15% of domestic visitors to CA in 2013 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

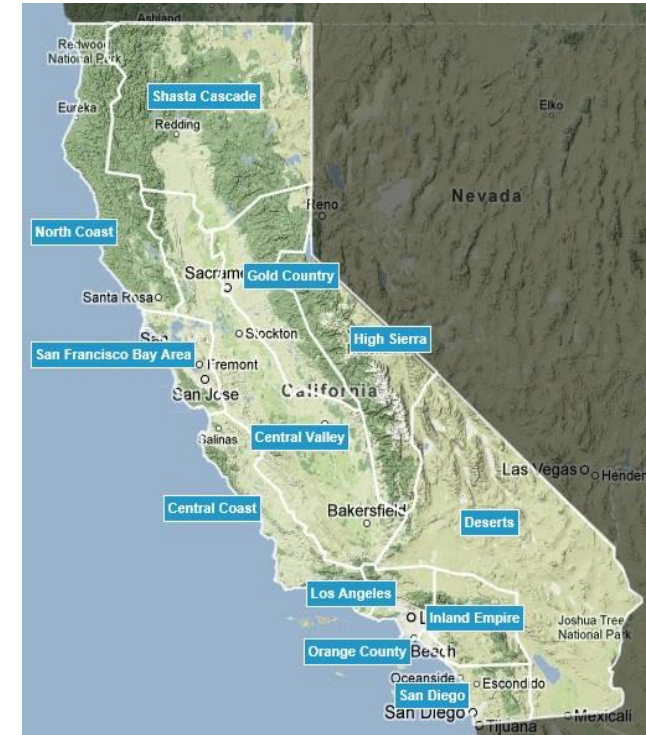


Source: Mandala Research



# 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).

**Opportunistic:** 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  
dream big

START DREAMING



California  
RESTAURANT  
MONTH

# DREAM 365 TV





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](http://foodandwine.com/california)

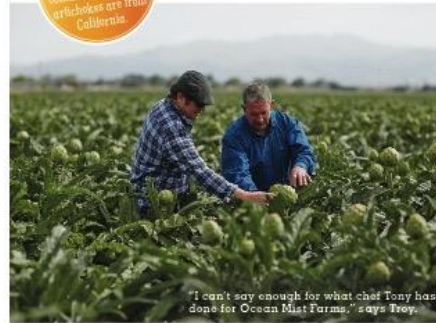
easy access to lush, local produce, the city is a haven for the state's restaurateurs like chef Tony Baker of Montrio Bistro. Chefs in Monterey create dishes that are jam-packed with Golden State flavors, made possible by California farmers who annually turn out more than 400 crops of fruits, vegetables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



99.99%  
percent of all  
commercially grown  
artichokes are from  
California.

The many restaurants on the Monterey Peninsula are able to source local produce, seafood and wine on a daily basis.



"I can't say enough for what chef Tony has done for Ocean Mist Farms," says Troy.

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,



Artichokes are served in an endless number of ways at Montrio Bistro: steamed, grilled and incorporated in sauces and side dishes, to name a few.

7,700+  
acres of California  
farmland dedicated  
to growing  
artichokes.

# California, Always in Season

- \$1 million partnership with CA GROWN
- Media buy with Time Inc.
  - Print spreads
  - Video vignettes
  - Robust digital activation
  - Event activations



# California, Always in Season

Year 1 included six  
videos shot across  
the state





# ADVERTISING IMPACT

	No recall	Recall	Delta
<b>Image of California</b>			
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

# WORKING WITH VISIT CALIFORNIA





Industry Website  
The marketing resource for  
California travel professionals.



SIGN OUT MY ACCOUNT

Search Industry Site

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

