ORANGE COUNTY VISITORS ASSOCIATION

2019-2021
DESTINATION MARKETING PLAN

Forward Together.
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</tbody>
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Forward Together.
A. EXECUTIVE SUMMARY

Last year, Orange County, California, welcomed a record 50.2 million visitors who spent an astounding $13 billion dollars in The OC—Southern California’s coastal fantasyland. They enjoyed ocean breezes, engaged in retail therapy and thrilled their inner child at world-class attractions. They savored craft beverages, dined alfresco, and signed up for surf yoga. They delighted in family time, business time, me time, and wished they had more time, because The OC has so many stories to tell. As Orange County passes this monumental 50-million visitor milestone, Orange County Visitors Association (OCVA) presents the following three-year destination-marketing plan to propel The OC and its numerous partner destinations, resorts, hotels, luxury retail centers and attractions even farther as we collectively move Forward Together!

The OC is many voices and numerous stories. As the county’s tourism ambassador, Orange County Visitors Association is both global strategist, master storyteller and new-market incubator. Collectively achieving what individual organizations cannot on their own, OCVA sells, markets, promotes, educates and advocates for “Visit The OC,” which is the destination brand of Orange County, California. Through an unprecedented, dynamic alliance of tourism partnerships, partner investment in the organization has grown from $270,000 in 2012 to $1.3 million in 2019. And, OCVA Board of Directors’ membership has increased from 58 members in 2015 to 63 members in 2019.

Initiatives now span the globe across multiple international markets with fully integrated, in-bound marketing programs from China to the Middle East; from Mexico and Canada to major media markets in the United States; and from exploratory markets like Japan and India to fundamental programs that encompass countywide research, digital marketing, education and advocacy.

Globally, OCVA extends The OC destination message through cost-effective sales and marketing strategies in complex markets. International markets are selected for their long-term desirability as a potential and existing source market based on demographics, accessibility, and alignment with other major tourism partners to generate layered value for the investment (e.g. Brand USA, Visit California).

Domestically, OCVA enhances The OC destination message in markets that are expensive to reach individually, such as the Bay Area, or offer great value in combination with individual destination-marketing organization efforts, like the Pacific Northwest. Initiatives are designed to reach multiple audience segments including: group/incentive meetings, transient/free individual travelers (FIT), travel trade and consumer/trade media.

Despite the tremendous growth in tourism to Orange County, there are economic and political headwinds from many global markets that are approaching, and the following destination-marketing plan considers these winds of change. This new plan pivots resources, refocuses efforts and realigns initiative spending with strong, measurable objectives supported by clear strategies and tactics. This new rigor toward measurement and return on investment (ROI) is essential in the rapidly changing landscape of global tourism.

As we refocus our collective efforts toward the greatest return on investment or new opportunity, we can move Orange County tourism forward. It’s going to take a new approach, a new philosophy and renewed commitment to do together what each of us is unable to do on our own.
Working together, we move *Forward Together*.

Forward Together,

[Jay Burress Signature] [Ed Fuller Signature]

Mr. Jay Burress  Mr. Ed Fuller  
Chairman  President & CEO
Orange County Visitors Association  Orange County Visitors Association

President & CEO  
Visit Anaheim

“Orange County is such a unique destination. From gorgeous beaches and world-famous attractions to extraordinary shopping and dining to luxurious hotels and the largest Convention Center on the West Coast - Orange County really does have something for every traveler. We are thrilled about reaching this historic milestone of 50+ million visitors, but what’s especially exciting is that it translates directly to the creation of more jobs and more economic opportunity for Orange County.” - Jay Burress, chairman, Orange County Visitors Association

“As Orange County residents, we are blessed with a wonderful climate and world-class arts and culture, attractions, retail and recreation. It is no surprise that these very same amenities have drawn an incredible 50+ million visitors to our community - what a milestone! The County of Orange is proud of the role we play in welcoming these visitors by providing wonderful parks and beaches, the unparalleled Dana Point Harbor and customer-favorite John Wayne Airport.” - Lisa Bartlett, chairwoman of the Orange County Board of Supervisors
B. OCVA MISSION, VISION & VALUES

Orange County Visitors Association (OCVA), formerly the Orange County Tourism Council, was formed in 1999 and restructured in 2011 as a 501(c)6 not-for-profit association to represent all tourism and hospitality-related businesses and visitor destinations in Orange County, California.

Its primary functions have been destination marketing, promotional support, issues advocacy and educational and training development all within a unique collaborative and partnership approach. The current investor/partner complement comprises a Board of Directors with more than 60 members and an operating budget of approximately $1.3 million spanning multiple initiatives.

Orange County Visitors Association Total Partner Investment 2012-2019 (fiscal years)

Key OCVA Budget Milestones & Variances:

- **2014** - New Initiatives: Mexico, Middle East, North America and WeChat in China
- **2015** - New Initiatives: India, Japan, and China MICE (meetings, incentives, conferences and exhibits)
- **2016** - New Initiative: San Francisco Integrated Cooperative Marketing Campaign
2018 - Initiatives on Hold: Mexico.
Launched new VisitTheOC.com consumer website at no additional cost to members/partners. New site features strong destination storytelling content with quick referral links to partner websites.

OCVA VISION STATEMENT
Ignite global passion for Orange County.

OCVA Global Sales & Marketing Vision
Ignite global passion for visiting Orange County.

OCVA Education Vision
Spark Orange County’s knowledge, understanding and awareness of global tourism and hospitality issues within The OC destination as well as all in-bound tourism markets.

OCVA Advocacy Vision
Enhance stronger appreciation, understanding and support for Orange County’s tourism and hospitality industries, workforce development and the value of tourism to The OC—at the local, regional, national and international levels.

OCVA MISSION STATEMENT
Collectively lead our investors and partners through highly-targeted, research-driven Orange County destination sales and marketing, advocacy and educational programs to generate economic prosperity and results that none of those partners could achieve individually or on their own.

OCVA VALUES & OPERATING PRINCIPLES

<table>
<thead>
<tr>
<th>VALUES</th>
<th>OPERATING PRINCIPLES</th>
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<tbody>
<tr>
<td>Results-Oriented</td>
<td>Increase New Visitor Spending</td>
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<tr>
<td>Customer-Centric</td>
<td>Attract New Visitors</td>
</tr>
<tr>
<td>Professional</td>
<td>Create Leveraged Partnerships</td>
</tr>
<tr>
<td>Partner-Based</td>
<td>Minimize Operating Costs</td>
</tr>
<tr>
<td>Innovative</td>
<td>Research-based</td>
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<td>Resourceful</td>
<td>Proactive, Goals Driven</td>
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<td>Tourism and Destination Advocates</td>
</tr>
<tr>
<td>Long-term</td>
<td>Destination and Market Educators</td>
</tr>
<tr>
<td>Collaborative</td>
<td></td>
</tr>
</tbody>
</table>
C. IMPACT OF TOURISM IN ORANGE COUNTY

Orange County Visitor Volume and Spending (Source: CIC Research, Inc.)

OC visitor spending in 2018 was just over $13.0 billion, a 4.2% increase from 2017 ($12.5 billion). Visitor spending in Orange County has increased 64.5% in the past ten years, while visitor volume has increased 16.4% in the same time period. The volume of visitors to OC reached a new record high in 2018 at 50.2 million and visitor spending in the county also reached a new record high at $13.0 billion.
Tourism-Generated Revenues

Tax Revenues
2016, $Millions

<table>
<thead>
<tr>
<th></th>
<th>Amount</th>
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<tr>
<td>Federal</td>
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<tr>
<td>Personal Income</td>
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<td>Corporate</td>
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<tr>
<td>Indirect Business</td>
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<td>Social Security</td>
<td>388.7</td>
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<tr>
<td>Federal total</td>
<td>1,376.3</td>
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<tr>
<td></td>
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<tr>
<td>State</td>
<td></td>
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<tr>
<td>Sales</td>
<td>369.4</td>
</tr>
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<td>Personal Income</td>
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<td>41.7</td>
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<tr>
<td>Social Security</td>
<td>14.2</td>
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<td>Other Taxes and Fees</td>
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<td>State total</td>
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<td></td>
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<tr>
<td>Local</td>
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</tr>
<tr>
<td>Sales</td>
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<tr>
<td>Lodging</td>
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<tr>
<td>Other Taxes and Fees</td>
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<td>Local total</td>
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<td>TOTAL</td>
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Tourism Labor Income (Compensation)

(US$ Million)

<table>
<thead>
<tr>
<th>Industry</th>
<th>Direct</th>
<th>Indirect</th>
<th>Induced</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agriculture, Fishing, Mining</td>
<td>-</td>
<td>45.5</td>
<td>22.0</td>
<td>67.8</td>
</tr>
<tr>
<td>Construction and Utilities</td>
<td>-</td>
<td>21.0</td>
<td>10.3</td>
<td>31.3</td>
</tr>
<tr>
<td>Manufacturing</td>
<td>15.6</td>
<td>0.6</td>
<td>1.1</td>
<td>21.3</td>
</tr>
<tr>
<td>Wholesale Trade</td>
<td>-</td>
<td>62.0</td>
<td>75.0</td>
<td>137.0</td>
</tr>
<tr>
<td>Air Transport (local)</td>
<td>80.4</td>
<td>60.0</td>
<td>26.1</td>
<td>166.7</td>
</tr>
<tr>
<td>Other Transport</td>
<td>539.6</td>
<td>55.6</td>
<td>164.5</td>
<td>757.8</td>
</tr>
<tr>
<td>Retail Trade</td>
<td>18.2</td>
<td>3.8</td>
<td>9.0</td>
<td>31.0</td>
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<tr>
<td>Gasoline Stations</td>
<td>-</td>
<td>69.1</td>
<td>37.3</td>
<td>96.4</td>
</tr>
<tr>
<td>Communications</td>
<td>53.7</td>
<td>247.7</td>
<td>254.6</td>
<td>556.0</td>
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<tr>
<td>Finance, Insurance and Real Estate</td>
<td>-</td>
<td>577.3</td>
<td>196.0</td>
<td>773.2</td>
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<tr>
<td>Business Services</td>
<td>7.0</td>
<td>380.4</td>
<td>387.4</td>
<td></td>
</tr>
<tr>
<td>Education and Health Care</td>
<td>1,323.7</td>
<td>74.5</td>
<td>29.0</td>
<td>1,427.2</td>
</tr>
<tr>
<td>Recreation and Entertainment</td>
<td>1,177.0</td>
<td>0.9</td>
<td>0.9</td>
<td>1,178.7</td>
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<tr>
<td>Lodging</td>
<td>1,354.2</td>
<td>41.2</td>
<td>100.5</td>
<td>1,496.9</td>
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<tr>
<td>Food &amp; Beverage</td>
<td>51.6</td>
<td>52.5</td>
<td>78.8</td>
<td>182.7</td>
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<tr>
<td>Personal Services</td>
<td>-</td>
<td>61.9</td>
<td>52.9</td>
<td>114.8</td>
</tr>
<tr>
<td>Government</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TOTAL</td>
<td>4,617.8</td>
<td>1,369.2</td>
<td>1,440.0</td>
<td>7,427.1</td>
</tr>
</tbody>
</table>

Orange County Jobs by Industry in 2017

(Thousands)

<table>
<thead>
<tr>
<th>Industry</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Prof/Bus Services</td>
<td></td>
</tr>
<tr>
<td>Finance/Real Estate</td>
<td></td>
</tr>
<tr>
<td>Healthcare</td>
<td></td>
</tr>
<tr>
<td>Retail</td>
<td></td>
</tr>
<tr>
<td>Manufacturing</td>
<td></td>
</tr>
<tr>
<td>Construction</td>
<td></td>
</tr>
<tr>
<td>Tourism</td>
<td></td>
</tr>
<tr>
<td>Local Gov't</td>
<td></td>
</tr>
<tr>
<td>Food/beverage</td>
<td></td>
</tr>
<tr>
<td>Recreation</td>
<td></td>
</tr>
<tr>
<td>Education</td>
<td></td>
</tr>
<tr>
<td>Transportation</td>
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<tr>
<td>Information</td>
<td></td>
</tr>
<tr>
<td>State govt</td>
<td></td>
</tr>
<tr>
<td>Accommodations</td>
<td></td>
</tr>
</tbody>
</table>

Sources: Bureau of Economic Analysis, Bureau of Labor Statistics, Tourism Economics
Tourism Employment by Industry

Source: Tourism Economics
D. GLOBAL MARKET ANALYSIS

EXECUTIVE SUMMARY
While the major economic indicators show that the U.S. economy remains strong, the winds of change and uncertainty both domestically and internationally are picking up steam and warrant caution and extra attention as Orange County Visitors Association evaluates these new market conditions over the next few years.

U.S. Economic Indicators: Caution Ahead!
The U.S. Stock Market, unemployment rates and employment figures are at historic levels, yet there are some negative signs showing strong headwinds approaching. These headwinds include:

• Fourth quarter 2018 results for the United States showed an abrupt slowdown in consumer credit demand while simultaneously showing the largest levels of household debt since the Great Depression.
• A record seven million households are 90 days or more behind on automobile loan payments—more than during the Great Recession. Auto loan payments are typically the first and one of the most important payments a household makes each month.
• The start of 2019 saw a dramatic drop in consumer confidence.
• Business confidence also saw a dramatic drop at the start of 2019 fueled by the U.S. government shut-down and threats of trade wars.
• Rising personal and household debt. Total household debt rose by $32 billion to reach $13.5 trillion, nearly 70 percent of U.S. nominal gross domestic product (GDP).
• U.S. housing market is sluggish and showing a significant slowdown at the start of 2019.
• Household debt delinquency has moved from mortgages to other forms of debt: credit cards ($870 billion, matching its peak before the Great Recession), student loans ($1.5 trillion), and auto loans ($1.3 trillion, the highest loan total since 1999).


INTERNATIONAL ECONOMIC INDICATORS: CAUTION / PRECAUCIÓN / JÍNGGÀO
International inbound markets to the United States similarly are showing caution signs. From the recent trade war with China to the newly renegotiated North America Free Trade Agreement (NAFTA) into the slightly revised United States-Mexico-Canada Agreement (USMCA) ...from the proposed “Mexico/U.S. Wall” along the southern border to the rise in denials from U.S. State Department for Visa applications from potential Chinese visitors...from the looming BREXIT crisis in the United Kingdom to the decline in the United States’ share of all international travel, Orange County Visitors Association and its partners continue to be vigilant, continuously analyze market conditions, plan for the unforeseeable and strive to move forward together.

All of OCVA's target countries show uncertainty including cautionary signs from Mexico, Middle East, China and North America visitors to Orange County. Because of these changing conditions, market-specific strategies may change slightly, but staying the course in markets where we’ve made great headway, even with strong headwinds, can pay dividends in the long-run. Slight market-by-market tweaks during a potential downturn could include a slight refocus to stealing market share from competing destinations, or slight pullbacks in one audience groups/MICE with stronger pushes into transient consumer/free individual travelers (FIT). An Orange County competitive analysis shows no other competing destinations are pulling back resources, staff or commitments from any of these fluctuating markets. They
may be making minor tweaks to audiences and market mixes, but overall spending and staffing remain at 2018 levels going into 2019 and beyond.


U.S. Travel’s Forecasts of International Travelers to the United States by Top Origin Countries

<table>
<thead>
<tr>
<th>Rank</th>
<th>Origin Country</th>
<th>2017</th>
<th>% Change</th>
<th>2018</th>
<th>% Change</th>
<th>2019</th>
<th>% Change</th>
<th>2020</th>
<th>% Change</th>
<th>2021</th>
<th>% Change</th>
<th>2022</th>
<th>% Change</th>
<th>2023</th>
<th>% Change</th>
<th>2024</th>
<th>% Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Canada</td>
<td>20,212</td>
<td>5%</td>
<td>21,079</td>
<td>4%</td>
<td>21,967</td>
<td>3%</td>
<td>22,469</td>
<td>3%</td>
<td>22,968</td>
<td>3%</td>
<td>23,475</td>
<td>3%</td>
<td>24,003</td>
<td>4%</td>
<td>4,991</td>
<td>22%</td>
</tr>
<tr>
<td>2</td>
<td>Mexico</td>
<td>17,624</td>
<td>4%</td>
<td>19,428</td>
<td>9%</td>
<td>20,010</td>
<td>3%</td>
<td>20,611</td>
<td>3%</td>
<td>21,212</td>
<td>3%</td>
<td>21,798</td>
<td>4%</td>
<td>22,371</td>
<td>4%</td>
<td>5,138</td>
<td>20%</td>
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<td>3</td>
<td>Overseas</td>
<td>38,906</td>
<td>2%</td>
<td>40,869</td>
<td>5%</td>
<td>42,025</td>
<td>2%</td>
<td>43,225</td>
<td>3%</td>
<td>44,775</td>
<td>3.5%</td>
<td>46,382</td>
<td>3%</td>
<td>47,951</td>
<td>3.4%</td>
<td>9,046</td>
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<td>4</td>
<td>United Kingdom</td>
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<td>4,755</td>
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<td>4,945</td>
<td>4%</td>
<td>5,145</td>
<td>4%</td>
<td>5,398</td>
<td>3%</td>
<td>5,404</td>
<td>3%</td>
<td>921</td>
<td>21%</td>
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<td>5</td>
<td>Japan</td>
<td>3,596</td>
<td>-2%</td>
<td>3,488</td>
<td>-3%</td>
<td>3,523</td>
<td>1%</td>
<td>3,558</td>
<td>1%</td>
<td>3,590</td>
<td>1%</td>
<td>3,629</td>
<td>1%</td>
<td>3,702</td>
<td>2%</td>
<td>106</td>
<td>3%</td>
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<tr>
<td>6</td>
<td>China</td>
<td>3,174</td>
<td>-4%</td>
<td>3,137</td>
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<td>3,902</td>
<td>2%</td>
<td>3,401</td>
<td>3%</td>
<td>3,571</td>
<td>5%</td>
<td>3,821</td>
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<td>8%</td>
<td>953</td>
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<td>South Korea</td>
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<td>3%</td>
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<td>2,230</td>
<td>1%</td>
<td>2,252</td>
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<td>9</td>
<td>Brazil</td>
<td>1,912</td>
<td>11%</td>
<td>2,065</td>
<td>8%</td>
<td>2,107</td>
<td>4%</td>
<td>2,149</td>
<td>2%</td>
<td>2,173</td>
<td>3%</td>
<td>2,324</td>
<td>5%</td>
<td>2,363</td>
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<td>519</td>
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<td>10</td>
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<td>2%</td>
<td>1,891</td>
<td>8%</td>
<td>1,873</td>
<td>4%</td>
<td>1,929</td>
<td>3%</td>
<td>1,987</td>
<td>3%</td>
<td>2,027</td>
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<td>2,067</td>
<td>2%</td>
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<tr>
<td>11</td>
<td>Australia</td>
<td>1,924</td>
<td>-2%</td>
<td>1,369</td>
<td>3%</td>
<td>1,391</td>
<td>2%</td>
<td>1,405</td>
<td>1%</td>
<td>1,447</td>
<td>3%</td>
<td>1,519</td>
<td>5%</td>
<td>1,610</td>
<td>6%</td>
<td>287</td>
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<tr>
<td>12</td>
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<td>1,285</td>
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<td>1,414</td>
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<td>5%</td>
<td>1,574</td>
<td>6%</td>
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<td>2%</td>
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<td>3%</td>
<td>3,215</td>
<td>3%</td>
<td>3,252</td>
<td>3%</td>
<td>388</td>
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<td>1,059</td>
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CGMR = Compound Annual Growth Rate, the average annual rate of growth over the forecast period, including compounded growth.
Overseas includes all countries except Canada & Mexico.
Sources: U.S. Department of Commerce, International Trade Administration, National Travel and Tourism Office; Statistics Canada; Banco de Mexico. October 2018.
2018 ORANGE COUNTY VISA CREDIT CARD INTERNATIONAL & DOMESTIC MARKET RANKINGS (RANKED BY TOTAL CREDIT CARD SPEND)

INTERNATIONAL INBOUND MARKETS TO ORANGE COUNTY

U.S. DOMESTIC INBOUND MARKETS TO ORANGE COUNTY
1. China
2. Canada
3. Japan
4. Australia
5. Mexico
6. Middle East
7. United Kingdom
8. South Korea
9. Vietnam
10. France
11. Taiwan
1. Los Angeles/Riverside/Orange County
2. San Diego
3. San Francisco
4. Phoenix/Scottsdale
5. Las Vegas
6. Seattle
7. Sacramento
8. Denver
9. New York
10. Dallas
11. Chicago
INBOUND’S CHINA OUTLOOK

“Not since the Chinese government bestowed Approved Destination Status (ADS) on the United States at the end of 2007—this allowed U.S. tourism organizations to promote and sell their products, especially group tours—has the annual outlook for the market been so uncertain. The tentative nature of the situation is not a result of market conditions; rather, it has to do with a collection of political and government policies on the part of both China and the United States: a trade war between the two countries that has been characterized by new and/or increased tariffs placed upon the goods produced and/or imported by both countries; anger on the part of China over the arrest in Canada of a high-tech firm’s chief financial officer for having allegedly violated U.S. sanctions on Iran; and predictions that the Chinese government would impose a ban on travel to the U.S.”

“Were it not for the politically driven tensions between the two countries, there is much to be positive about. Responsible for this are a number of factors, first among them the growth of, and increasing sophistication of the Chinese tourism sales and marketing infrastructure—in terms of technical applications, China is well ahead of the United States tour and travel industry. For instance, there is nothing in the U.S. that matches the scale of the penetration that WeChat has in China.”

“Another stimulus to the ongoing increase in the number of Chinese traveling abroad is the creation of scores of millions of potential international travelers created by a healthy economy and the increase in discretionary spending. At the beginning of 2018, it was reported that 8.7 percent of the Chinese population hold passports. The percentage is small, but the number it represents is huge: 120 million. And Ctrip CEO Jane Sun predicted early last year that the number of Chinese passport holders will double to 240 million by 2020. It is difficult to grasp the impact of this number were, say, just 5 percent of these potential international travelers—12 million people—to travel to the USA.”

Source: INBOUND’s 22nd Annual Analysis for Inbound Travel to the USA in 2019

U.S. TRAVEL ASSOCIATION’S CHINA OUTLOOK

The latest research from U.S. Travel Association states, “Chinese tourists are staying closer to home this Lunar New Year with 400 million anticipated to travel domestically and only 7 million forecast to travel abroad. This includes fewer visitors to the U.S. than previous years. Chinese outbound travel to the United States has seen a significant slowing since trade frictions between Beijing and Washington, DC began escalating. In July through September, arrivals fell 20 percent from a year earlier, according to the China Outbound Tourism Research Institute, which analyzes Chinese travel data. Moreover, Chinese consumers account for a third of global duty-free spending, and the economic slowdown has weighed on travel companies. Still, Bloomberg estimates that seven million Chinese visitors will head to overseas destinations during the holiday, an 8 percent increase from last year.”

U.S. Travel Association goes on to state, “The Chinese international travel market is expected to account for a quarter of all global international travel in just over a decade, as the number of Chinese travelers is predicted to nearly triple according to a recent Resonance report.”

Fourth quarter as well as all of 2018 show a slightly brighter picture here in Orange County with Visa cardholder spending in Orange County at record highs. And, China still ranks as The OC’s number one international inbound market outside of Canada and Mexico.

Sources: U.S. Travel Association, VisaVue
VISIT CALIFORNIA’S CHINA OUTLOOK

Top Takeaways:
- Chinese visitors come for an extended period and spend more during their stay.
- Chinese FIT’s are young, well-educated, affluent and have international travel experience.
  - FIT travel up 40%
- Primary target is rapidly growing middle class. Under-35 demographic is growing and outspending their elders.
  - 87% of outbound travelers are under-40
- 43,696 weekly non-stop seats
- 150 weekly non-stop flights
- California is the ideal destination/brand/lifestyle experience for a younger, affluent audience

Challenges
- High VISA application rejection rate
- Language barrier and long travel time
- Political tensions
- Softening economy
- Single-digital growth rate (still a huge volume of people)
- Intensified competition

Source: Visit California
MIDDLE EAST MARKET PROFILE

VISIT CALIFORNIA’S MIDDLE EAST ANALYSIS

OCAA is focused on six primary Middle East markets: Saudi Arabia, United Arab Emirates (UAE), Qatar, Kuwait, Bahrain and Oman. Saudi Arabia and the UAE are the largest markets based on VisaVue data. Qatar and Kuwait are the secondary markets, while Bahrain and Oman rank as level three source markets. In 2018, California had 259,000 visitors from Middle East countries, spending in excess of $705 million, with an average night length of stay of 12.3 nights.

Middle East flights are plentiful compared to other source markets. Los Angeles International Airport has direct air service from the Middle East via Emirates Airways, Etihad Airways, Qatar Airways and Saudi Airlines. Orange County/John Wayne Airport has connections to many cities served by Middle East air carriers (Dallas, New York, Chicago, Seattle, etc.). California has 28 direct flights per week (LAX & SFO), primarily on Boeing 777 and 787 aircraft and Airbus A350 and A380 aircraft serving California, representing 11,614 seats per week.

Source: Visit California

TOURISM ECONOMICS’ MIDDLE EAST OUTLOOK

The UAE, Saudi Arabia and Qatar are all a member of the Gulf Cooperation Council (GCC). The cooperation of regions in the area is a key indicator as to the economic situations of their citizens. GCC economies can look forward to stronger growth amid higher oil prices and easing austerity. GCC governments remain committed to keeping their currencies pegged to the U.S. dollar, and there are no discussions or plans to change course. Absent another severe downturn in oil prices, the pegs are likely to stay for the next few years.

As GCC economies diversify away from oil, the countries need more flexible exchange rates regimes that can make their nascent non-oil sectors competitive in relation to their trading partners, which are increasingly in Asia (by contract, the U.S. accounts for about only 5% of total GCC exports). As fiscal reforms bear fruit in terms of revenue diversification, a coordinated move to currency baskets—to include the Chines Yuan at the very least—will increasingly make more sense.

Maintaining the currency peg implies importing U.S. monetary policy. Even with the Federal Reserve rate hikes in 2018, they should not be much of an issue for GCC economies in the near term, given that the business cycles are fairly aligned (with growth and inflation accelerating). But, the tightening has nonetheless curtailed the GCC region’s still weak-growth recovery.

The GCC is no longer a debt-free region. Government debt levels have ballooned since 2014, pushed up by wide budget deficits caused by the fall in oil prices. Although, we see the pace of the debt build-up slowing, it will not reverse until 2021, when we expect the region to return to an aggregate fiscal surplus. Aside from Bahrain, the first USD bond maturities become due in 2021.

We expect the region’s economic recovery to continue, but pockets of political risk remain. A wider regional conflict would drive up the risk premium for oil and possibly affect physical flows of the commodity, as well as impact tourism and damage key infrastructure.

Source: Tourism Economics
VISIT CALIFORNIA’S MIDDLE EAST OUTLOOK

Top Takeaways:

1. Increasing Outbound Departures: 46 million in 2020 to 60 million in 2030.
2. High GDP Per Capita: $130,686/Capita in Qatar vs $8,000/Capita in China.
3. Extraordinary Average Travel Spend Per Person Per Day: $3,280 for Emiratis, $3,660 for Saudis, $4,100 for Qataris.
4. Amazing Length of Stay: Average stay by GCC visitors in the United States is 32 nights.
5. Travel in Large Numbers: Family (multi-generational) travel is most common, ranging from an average of 6 - 8 people per family (including nannies/helpers). Some families can be up to 12 people and more.
6. Travel in Style: Gulf Nationals spend 2.6 times more on airfares than the global average.
7. Stay in Style: Gulf Nationals spend 4.3 times more on accommodations than the global average, 45% stay in five-star hotel/resort properties, while only 8% stay in three star or lower categories.

Source: Visit California
MEXICO MARKET PROFILE

INBOUND’S MEXICO OUTLOOK
“Despite the fact that the people of Mexico have had a record low approval of U.S. President Donald Trump, the antagonism toward the U.S. leader has not translated into a reluctance to visit the United States because, the fact is that, the cultural and linguistic bonds between the U.S. and Mexico are too firm and too well-established to prevent the country from being one of our two largest international source markets for inbound tourism.”

“Aside from the economic factors driving travel, Babbel magazine tells us that in the United States, more than 41 million people who speak Spanish as a first language (about 13 percent of the population), and that number continues to grow. Additionally, the U.S. is home to nearly 12 million bilingual Spanish speakers. This makes the United States the second-largest Spanish speaking country in the world (after Mexico). And there are 32 million Americans who are of Mexican descent.”

“Obviously, there is a strong VFR market for Mexicans traveling to the U.S. and one of the reasons they are doing so in greater numbers than a decade ago is the growth of two low-cost carriers, Volaris and Viva. Volaris now travels to 26 U.S. cities and Viva to 12. Also, legacy carriers have increased their lift capacity between the U.S. and Mexico. There are more data to buttress the point, so do not be surprised that NTTO is forecasting an increase in the number of Mexicans traveling to the U.S. this year at just over 20 million—more than 2 million more than there were in 2017, when Donald Trump became president and the peso had bottomed out against the dollar for about a year.”

Source: INBOUND’s 22nd Annual Analysis for Inbound Travel to the USA in 2019

ARRIVALS FROM MEXICO TO UNITED STATES
2016  18.99 million
2017  17.82 million
2018*  19.42 million
2019*  20.01 million
*Forecast
Sources: U.S. Department of Commerce, ITA, National Travel and Tourism Office, Banco de Mexico, and Statista.

VISIT CALIFORNIA’S MEXICO OUTLOOK
Top Takeaways:
• Mexico is California’s undisputed #1 international market, responsible for more than 40% of all international trips annually.
• Long weekends are increasingly popular.
• Airlift to CA has increased more than 50% during the past five years.
• 102,838 weekly non-stop seats
• 652 weekly non-stop flights, service to 11 CA destinations
• CBX/Tijuana airport is the new gateway to California with 1.9 million passengers in 2017, a 35% increase in usage Y/O/Y.
• Political rhetoric remains a challenge.

Source: Visit California
UNITED STATES MARKET PROFILE

U.S. TRAVEL ASSOCIATION’S U.S. OUTLOOK

With numerous political influences impacting the U.S. economy, the latest research and forecasts from U.S. Travel Association show a weakening GDP growth. As of March 2019, U.S. Travel Association has revised GDP growth forecasts down to a flat 0.4 percent growth.

“Has the economic recovery peaked? As expected, the economy slowed down in the fourth quarter of 2018 to a moderate 2.4 percent growth. Unexpected, however, was the dramatic drop in consumer spending, business investment and the December trade balance.

- Despite the fall of consumer spending in December due to some rough retail sales numbers, consumer confidence rebounded in February, bringing hope that the consumer will remain the engine of economic growth across 2019.
- The labor market decelerated hiring to a near-halt in February, but the unemployment rate shrank to 3.8 percent and increases in the average hourly wages provided robust silver linings.
- The trade deficit (in goods) reached an all-time high, with exports plunging in December. However, the travel trade surplus remained robust and a possible respite from recent U.S. trade disputes could provide greater clarity to exporters and foreign consumers.

In light of this new information, first-quarter GDP forecasts for 2019 have been revised down to a flat 0.4 percent growth. While somewhat disappointing, economic forecasts point to the U.S. finishing the first act of a well-worn “slow first quarter, fast second quarter” economic pattern seen throughout the recovery.”

Source: U.S. Travel Association

U.S. TRAVEL ASSOCIATION’S U.S. TRAVEL INDUSTRY UPDATE

“Consistent themes American travelers are interested in in 2019 include a desire to tune out and reconnect, get outdoors and make memories whether alone or with the whole family. While the lodging and airline industry predict continued growth, it will be subdued for the next year or so.”

Source: U.S. Travel Association
INDIA MARKET PROFILE

INBOUND’S INDIA OUTLOOK

“The Perfect Storm.”

“India will soon have the world’s largest population. From an item in the Sept. 11, 2018 issue of the Asian Times, India’s population on Sept. 9, 2018, according to estimates by the U.S. Census Bureau’s World Population Clock, was 1.336 billion versus China’s 1.339 billion, and India’s population was growing at a much faster rate than that of China.”

“International air service is growing. In addition to increase lift capacity to the U.S. by Air India, the nation’s flag carrier, there have been considerable increases by other carriers in flights out of India to the Middle East—especially to Dubai, home base of Emirates airlines and the location of one of the few U.S. CBP pre-clearance facilities for travel into the USA.”

“There is a strong aspiration of Indians to travel to the United States. In addition to leisure travel to America, the U.S. is a strong VFR market, especially in the Boston-to-Philadelphia corridor, and in parts of California, where many Indian professionals have settled—usually after earning at least one degree from a U.S. university. India is No. 2, behind only China, in the number of students it sends to study in at American colleges and universities.”

“NTTO is forecasting 5 percent increase in Indian visitation to the United States in 2019. This follows an overall increase, since 2000, of almost 350 percent in the number of Indians who have visited the USA each year.”

Source: INBOUND’s 22nd Annual Analysis for Inbound Travel to the USA in 2019

VISIT CALIFORNIA’S INDIA OUTLOOK

Top Takeaways:

• India’s economy is expected to grow at 7% or more Y/O/Y due to strong private demand and government reforms. In 2016, India jumped 16 places in the World Economic Forum’s 2016-2017 Global Competitiveness Index to emerge as the highest rising economy due to improvement in good market efficiency, business sophistication, and innovation.
• Current ease of the VISA process makes the US an attractive destination.
• Indian travelers are highly depending on Middle East carriers.
• Young, upwardly mobile middle class with strong travel aspirations.
• High % of Indian business and VFR travelers to US/ California.
• Experiential demand is growing, fueled by luxury segment.
• 1,428 weekly non-stop seats.
• 6 weekly non-stop flights on Air India. Direct flight into LAX was scheduled to launch in 2018 (confirm?)
• Challenges include long travel time and limited air lift, as well as air fare costs.

Source: Visit California
JAPAN MARKET PROFILE

VISIT CALIFORNIA JAPAN OUTLOOK

Top Takeaways:
• 61 percent of bookings are done online.
• All of the largest 25 tour operators package California.
• 40 percent book package or group tours and demand is growing again for all-inclusive tours over FIT “free style” packages.
• Men over 50 seek to relive their youth through outdoor adventures such as surfing, hiking and biking.
• Women 20-50 pursue “city escapes” featuring cosmopolitan experiences.
• Theme parks are once again a popular option for families and young couples.

Source: Visit California
E. FORWARD TOGETHER STRATEGIES

2019-2021 GLOBAL SALES & MARKETING STRATEGIES

A. CHINA INITIATIVE STRATEGIES
• Reposition China MICE Initiative to Address Visa Rejection Issues
• During current economic instability, focus on Online Travel Agencies in China and on-the-ground, U.S. receptive operators to steal market share
• CTRIP
  o Develop Robust Orange County Pavilion—Part of Visit California Travel Pavilion on CTRIP
  o Increase Brand USA Sponsorship
  o Expand Number of Hotels on CTRIP
• Plan and execute 2020 China Sales Mission

B. MIDDLE EAST INITIATIVE STRATEGIES
• Booth and Panel Discussion at Arabian Travel Market (ATM)
• Visit California CEO Mission - April 2019
• Plan and execute 2020 Sales Mission
• Continued Marketing and Public Relations Efforts

C. MEXICO INITIATIVE STRATEGIES
• Relaunch Mexico Initiative
• Marketing and PR focused
• Sales Mission - October 2019 and beyond

D. JAPAN & INDIA INITIATIVE STRATEGIES
• Incubator Stages: Exploratory markets - media focused

E. U.S. & CANADA INITIATIVE STRATEGIES
• North America Initiative (Pacific Northwest/San Francisco)
• Relaunch San Francisco Initiative
• Launch new Digital Initiative & New Consumer Website
• New Global Communications Strategy

F. SALES & MARKETING STRATEGY STRATEGIES
• Develop three-year OCVA Destination Marketing Plan with ROI-focused goals, strategies and tactics
• Develop an OCVA Annual Marketing Workplan with annual updates, revised goals, new research and new objectives, strategies and tactics
• Develop new incubator strategy to explore new markets (Japan, India & South Korea), and develop new handoff strategy for mature markets to OC destination-marketing organization partners
• Cultivate new marketing leadership for effective plan implementation, management, measurement, and reporting/communications back to stakeholders
• Streamline reporting, metrics and results back to stakeholders
• Streamline global messaging, content and promotions across all initiatives
• Evaluate an initiative to Promote The OC and participating partners with U.S.-based receptive tour operators to gain market share against competing California destinations/attractions
2019-2021 EDUCATION STRATEGIES

- Launch New Countywide Educational Strategy - PC Workforce Campaign
- Continue to enhance educational programming for the OCVA Annual Tourism Conference
- Create Japanese market awareness training video in 2020
- In 2020, develop and implement new Orange County Hospitality/Tourism Career Program for workforce development
- Expand Advocacy Outreach
- Support OCA PAC as requested by PAC Management
- Create and expand Associate Membership Program to expand our base.

2019-2021 ADVOCACY STRATEGIES

- Continue efforts to advocate for a united, strong, well-funded tourism strategy in Orange County
- Continue to show the economic impact, ROI and value of tourism to Orange County through robust, marketing research and business intelligence
**2019-2021 GLOBAL GOALS/KEY PERFORMANCE INDICATORS**

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<th>OCVA GLOBAL GOALS</th>
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## 2019-2021 INITIATIVE GOALS

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<th>2019 GOAL</th>
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<th>JAPAN MARKET</th>
<th>2019 GOAL</th>
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<th>2019 GOAL</th>
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<td>UNITED STATES/CANADA MARKET</td>
<td>2019 GOAL</td>
<td>2020 GOAL</td>
<td>2021 GOAL</td>
</tr>
<tr>
<td>-------------------------------</td>
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</tr>
<tr>
<td><strong>U.S./CANADA PR INITIATIVE</strong></td>
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| Pacific Northwest Campaign   |           |           |           |
| Media Articles Generated     | 16        | 16        | 16        |
| Media Reach                  | 23,100,000| 23,793,000| 24,506,790|
| Social Media Reach           | 35,000,000| 36,050,000| 37,131,500|

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<tr>
<th><strong>SAN FRANCISCO INITIATIVE</strong></th>
<th>Pending Initiative Creation</th>
<th>Pending Initiative Creation</th>
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<tbody>
<tr>
<td>Incremental Trips to OC</td>
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<tr>
<td>Incremental Room Nights</td>
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<td></td>
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<td>Incremental Visitor Spending</td>
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<td>Return on Investment</td>
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<td>Social Media Reach</td>
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<td>Media Reach</td>
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<td></td>
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</tr>
<tr>
<td>Paid Advertising Impressions</td>
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# II. 2019-2021 GLOBAL INITIATIVES SECTION DIVIDER

<table>
<thead>
<tr>
<th>INITIATIVE</th>
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<tbody>
<tr>
<td>A. China Initiative</td>
<td>32</td>
</tr>
<tr>
<td>B. Middle East Initiative</td>
<td>36</td>
</tr>
<tr>
<td>C. Mexico Initiative</td>
<td>37</td>
</tr>
<tr>
<td>D. Japan &amp; India Initiatives</td>
<td>38</td>
</tr>
<tr>
<td>E. United States/Canada Initiative</td>
<td>40</td>
</tr>
<tr>
<td>F. San Francisco Initiative</td>
<td>41</td>
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<tr>
<td>G. Digital Initiative</td>
<td>42</td>
</tr>
<tr>
<td>H. Destination Research Initiative</td>
<td>43</td>
</tr>
<tr>
<td>I. Sales &amp; Marketing Initiative</td>
<td>44</td>
</tr>
<tr>
<td>J. Education Initiative</td>
<td>45</td>
</tr>
<tr>
<td>K. Advocacy Initiative</td>
<td>46</td>
</tr>
</tbody>
</table>

*Forward Together.*
A. CHINA INITIATIVE

CHINA MARKETING PLAN

**OBJECTIVE:** Increase the number of visitors and visitor spending in Orange County from China.

1. **CHINA MARKET TRAVEL TRADE GOALS**
   - Facilitate a minimum of 50 annual in-house trainings/educational seminars/workshops for Orange County exclusively to target key Chinese tour operators in Beijing, Guangzhou, and Shanghai in FY2019
   - Conduct a minimum of eight combined Chinese travel agents and media FAM visits during FY2019
   - Implement a minimum of 700 sales calls as mutually defined by OCVA and Aviareps
   - Increase packages available for sale across all travel trade channels to more than 120 packages

**China Market Travel Trade Strategies:**
- Focus on Online Travel Agencies (OTAs) to expand FIT/consumer visitation in lieu of drop in MICE meetings
- Utilize a major event at Disneyland to build awareness
- Develop engaging and consistent training materials for all trainings and sales calls
- Establish thematic focus for trainings and sales calls – i.e. Introduction to OC, OC Dining, OC Family, OC luxury, OC activities
- Prepare digital OC itineraries that highlight the themes, brand pillars and destination/partner content
- Coordinate FAMs during the year with focus on media FAMs
- Provide digital marketing content for all travel trade partners
- Determine clear definition and measurement for “sales calls” as well as target territories
- Plan and execute China Sales Mission in 2020

**China Market Travel Trade Tactics:**
- Request current training materials and update accordingly
- Establish a sales calls with appropriate themes or target holidays
- Request training feedback about content and ensure all questions are answered
Request tour operators to identify top-selling packages/destinations so that OCVA can study them and share learnings with initiative members. Proactively develop strategic offerings that reflect sales trends.

Streamline monthly report.

2. **CHINA MARKET EARNED MEDIA/MEDIA RELATIONS GOALS:**
   - Increase earned media value from $20 million to $22 million annually.
   - Increase earned media reach from nearly 26 million to nearly 28 million impressions annually.
   - Increase social media followers from 140,000 to nearly 149,000 annually.
   - Increase social media reach from 303,680 to 322,174 annually.
   - Maintain and update Chinese press kit on Orange County and its initiative participants.
   - Distribute up to four Orange County press releases.
   - Conduct a minimum of two consumer and travel trade media interviews when OC management is in the market.

**China Market Earned Media/Media Relations Strategies**
- Establish editorial calendar for communication planning.
- Ensure all Aviareps involved in OC messaging have completed a recent training.
- Maintain consistent messaging between travel trade and media.
- Increase destination interest awareness through the use of thematic/seasonal messaging.
- Measure press release performance to determine future messaging.

**China Market Earned Media/Media Relations Tactics**
- Align with OC pillars throughout all messaging.
- Use existing content when possible; develop custom content where appropriate.
- Distribute all releases to Initiative partners to ensure higher awareness of in-market messaging.
- Utilize travel trade itineraries with the media for increased destination education.
- Host a media reception in conjunction with fall sales visit - pending budget.
- Integrate content across Chinese audiences whenever possible to connect messaging through travel trade, media relations and WeChat.
3. **CHINA MARKET SOCIAL MEDIA GOALS (WECHAT)**
   - Increase WeChat posts from 96 to 102 annually
   - Increase WeChat followers from 115,401 to 122,429 annually
   - Increase WeChat Campaigns from 24 to 25 annually
   - Create eight articles per month
   - Increase follower engagement
   - Continue to develop, refine and distribute monthly performance reports
   - Develop and implement WeChat campaigns upon request pending budget

**China Market Social Media Strategies (WeChat)**
   - Utilize WeChat as a highly adaptable promotional tool which can respond to marketplace conditions when necessary
   - Engage consumer audience with OC messaging that highlights lifestyle and the 5 pillars.
   - Increase post readership and interactions
   - Establish a monthly editorial calendar that proactively plans for content and creates a consistent tone across posts
   - Integrate content from travel trade and PR whenever possible to amplify OC messaging in market

**China Market Social Media Tactics (WeChat)**
   - Utilize OC itineraries or portions of itineraries to amplify the destination message with posts. For example, a dining post would be elongated with some content about nearby hotels and activities so that the OC is presented in a broader context
   - Analyze monthly reports to determine content with greatest results and increase those posts whenever possible
   - Implement 1-2 promotions per quarter either with giveaways or special rates to that drive followers to CTrip for booking opportunities
   - Ask more questions of our followers around lifestyle content - would you try surfing or sailing on your first day at the beach? Who is your favorite Disney character?
   - Include 5-10 high-quality images with each post
4. CHINA MARKET CTRIP GOALS
   • Increase number of participating hotels from 50 to 53 hotels
   • Increase number of packages available for booking from 30 to 32 packages including a specific percent increase annually
   • Increase impressions from 800 million to 820 million impressions
   • Increase click-throughs from 180,000 to 200,000 click-throughs
   • Increase hotel room nights produced from 20,000 to 25,000

   CTRIP Market Strategies
   • Expand number of hotels and packages available for sale on CTRIP
   • Develop robust content and timely promotions to push out on CTRIP channels
   • Maintain Brand USA Sponsorship

5. CHINA MARKET MICE GOALS
   • Conduct 154 to 158 sales calls
   • Conduct eight training sessions annually
   • Train approximately 400 agents annually
   • Attend approximately one MICE tradeshow annually
   • Encourage at least one FAM trip annually
   • Generate approximately 6,000 MICE Lead Room Nights annually
   • Book approximately 998 to 1,000 MICE Room Nights annually.

   MICE Market Strategies
   • Given the difficulty with China MICE groups obtaining U.S. Visas to travel to the United States, OCVA will reposition the China MICE Initiative down to minimal levels to keep a presence in the marketplace and prepare for future changes with U.S. Visa approval processes
   • Based upon participant funding levels dropping, China MICE Goals were reduced from 2019 goals
   • Maintaining a base-level presence and minimum staffing levels for The OC’s MICE representatives in China will enable The OC and its partners to easily ramp back up, if market conditions improve
B. MIDDLE EAST INITIATIVE

MIDDLE EAST MARKETING PLAN

**OBJECTIVE:** Increase the number of visitors and visitor spending in Orange County from Middle East countries.

1. **MIDDLE EAST MARKET TRAVEL TRADE & EARNED MEDIA GOALS**
   - Facilitate a minimum of 23 up to 24 annual in-house trainings/educational seminars/workshops for Orange County exclusively to target key Middle East tour operators
   - Implement a minimum of 510 sales calls annually
   - Train at least 484 agents annually
   - Conduct a minimum of two-to-eight combined Middle East travel agent and media FAM visits annually
   - Increase packages available for sale across all travel trade channels
   - Attend a minimum of nine tradeshows annually
   - Generate an earned media reach of at least 5.3 million impressions annually and a media value of $2.2 million annually.

**Middle East Market Travel Trade & Earned Media Strategies**
- Maximize OC destination messaging and increase visitor intent.
- Align with OC pillars throughout all messaging. Use existing content when possible; develop custom content where appropriate.
- Distribute all releases to Initiative partners to ensure higher awareness of in-market messaging.
- Establish streamlined quarterly reporting format to facilitate measurement of activities against deliverables.
- Require that the GCC team create a training presentation with top trends briefing for Initiative Partners, so our understanding of the market increases with destination visibility.
  - Create post-training de-briefs, so OCVA partners are aware of key questions/areas of interest for follow-up and expanded messaging.

**Middle East Market Travel Trade & Earned Media Tactics:**
- Conduct a minimum of eight meetings per month with key travel agents along with a recap and next steps
- Conduct a minimum of six in-house trainings/educational seminars/workshops per year exclusively showcasing Orange County to target GCC tour operators.
• Conduct a minimum of two travel agent group FAM visits per year in conjunction with airline partners.

• Creation and distribution of monthly Orange County e-postcards to key GCC travel agents.

C. MEXICO INITIATIVE

MEXICO MARKETING PLAN

OBJECTIVE: Increase the number of visitors and visitor spending in Orange County from Mexico.

1. EARNED MEDIA GOALS

• Generate an earned media reach of at least 47 million impressions annually and a media value of $6.2 million annually.

Earned Media Strategies

• Re-purpose top social media posts from initiative partners to provide consistent, partner-approved visual assets and messaging.

• Utilize global content calendar for monthly press releases. Distribute press releases to all partners for greater awareness of in-market activity.

Earned Media Tactics:

• Management of current social media platforms including Facebook and Twitter.

• Produce a weeklong Mexico Sales Mission.

• Monthly press release to media and travel trade.
D. JAPAN & INDIA INITIATIVES

JAPAN MARKETING PLAN

OBJECTIVE: As an incubator new market, increase Orange County destination awareness in Japan through earned media and social media channels.

1. JAPAN MARKET EARNED MEDIA GOALS
   • Generate at least $210,000 in earned media value through media relations, influencer and social media marketing in Japan
   • Generate at least 66 million earned media impressions through media relations, influencer and social media marketing in the Japan market

Japan Market Earned Media Strategies
   • Maximize earned media coverage by focusing on topics with a high rate of cultural interest
   • Create and distribute at least six press releases annually
   • Align with OC pillars throughout all messaging.
   • Use existing content when possible; develop custom content where appropriate.
   • Distribute all releases to Initiative partners to ensure higher awareness of in-market messaging.
   • Embrace Tokyo Olympics and create messaging that connects the OC with sports and athletes that are culturally significant in Japan. Position the OC as a sports capital for athletic experiences - “Come Be an Olympian in the OC”, i.e. surfing, baseball, snowboarding, swimming, running, etc.
   • Create FAM Opportunities with Visit California for 2019/2020.

Japan Market Media Relations Possible Pitch Topics
   • Release: Japanese Athletes in the OC
   • Release: Japanese Food and Chefs in the OC (can be included in a broader food release)
   • Release: Family Experiences in Nature (Parks and Beach)
   • Release: Summer Experiences/ Star Wars Land and Beyond
   • Release: Girl’s Getaways/ Women’s Weekends
   • Release: Beauty/Fashion/Lifestyle
INDIA MARKETING PLAN

OBJECTIVE: As an incubator new market, increase Orange County destination awareness in India through earned media and social media channels.

1. INDIA MARKET EARNED MEDIA GOALS
   • Generate at least $90,000 in earned media value through media relations, influencer and social media marketing in India
   • Generate at least 1.5 million earned media impressions through media relations, influencer and social media marketing in the India market

India Market Earned Media Strategies
   • Maximize earned media coverage by focusing on topics with a high rate of cultural interest.
   • Deliverables: 6 press releases
   • Align with OC pillars throughout all messaging
   • Use existing content when possible; develop custom content where appropriate
   • Distribute all releases to Initiative partners to ensure higher awareness of in-market messaging
   • Create Diwali event or experience in the OC prior to the holiday on Oct. 27th to promote cross-cultural synergy
   • Create FAM trip opportunity for 2020 in Partnership with Visit California

India Market Media Relations Possible Pitch Topics
   • Release: Unique Wedding Venues
   • Release: Indian Food in the OC (can be included in a broader food release)
   • Release: Family Experiences in Nature (Parks and Beach)
   • Release: Summer Experiences/ Star Wars Land and Beyond
   • Event/ Release: Diwali Event/ Experience
E. UNITED STATES & CANADA INITIATIVE

UNITED STATES & CANADA MARKETING PLAN

**OBJECTIVE:** Annually generate a minimum of 50 million earned media impressions of The OC and its initiative partners in domestic “opportunity” markets, such as the Pacific Northwest, San Francisco, Texas and Arizona, to be defined each year by the participating partners.

1. UNITED STATES & CANADA MARKETS EARNED MEDIA GOALS

   **San Francisco Earned Media Goals**
   - Generate at least 16 earned media placements from the San Francisco market
   - Attain at least 1.9 million earned media impressions from the San Francisco market
   - Generate at least 1.3 million social media impressions from the San Francisco market

   **Pacific Northwest Earned Media Goals**
   - Generate at least 16 earned media placements from the Pacific Northwest market
   - Attain at least 23.1 million earned media impressions from the Pacific Northwest market
   - Generate at least 35 million social media impressions from the Pacific Northwest market

   **Total U.S. & Canada Earned Media Goals**
   - Generate 16 earned media placements from pre-determined U.S. and Canadian markets
   - Attain at least 25 million earned media impressions from pre-determined U.S. and Canadian markets
   - Generate at least 36.3 million social media impressions from pre-determined U.S. and Canadian markets

   **United States & Canada Markets Earned Media Strategies**
   - Connect a minimum of 20 targeted media and influencers from pre-determined media markets with Initiative partners to generate positive media coverage of The OC and the participating partners as a desirable destination for family, luxury, outdoor, culinary and cultural experiences.

   **United States & Canada Markets Earned Media Tactics**
   - **Take the OC to the media**
     Produce an annual media mission in one target market connecting participating Initiative Partners with a minimum of 15 highly-relevant media/influencers.
   - **Bring the Media to The OC**
     Secure six-to-eight A-list media/influencers in one or more target markets for individual FAM tours of The OC. Develop itineraries to
feature all appropriate partners and communicate unique story angles tailored to each outlet’s coverage specialty.
F. DIGITAL INITIATIVE

DIGITAL MARKETING PLAN

OBJECTIVE: Debut new VisitTheOC.com website as The OC’s digital marketing hub and establish benchmarks for monthly online reach and engagement with destination and partner messages.

1. DIGITAL INITIATIVE MARKETING GOALS
   • Generate increased VisitTheOC.com website Page Views, engagement and time-on-site metrics
   • Generate incremental, increased click-throughs to destination partner websites

Digital Initiative Marketing Strategies
   • Launch new Orange County storytelling website full of rich content and stories about the destination, thereby moving away from the old “directory” style listing into a true destination-storytelling model via a new mobile-responsive website
   • Tell the “Visit The OC” story and all of OCVA's partners’ stories to all audiences across all initiatives and markets
   • Create engaging content through the use of blogs, videos and other content to increase time on site, reduce bounce rates and increase click-throughs to partner websites

Digital Initiative Marketing Tactics
   • Create additional content-marketing, paid opportunities for OCVA partners to buy into to expand the reach and audience
   • Promote the new “VisitTheOC.com” website via online and offline channels
   • Ensure proper language translations are available in each of the initiative markets
G. DESTINATION RESEARCH INITIATIVE

DESTINATION RESEARCH MARKETING PLAN

<table>
<thead>
<tr>
<th>OBJECTIVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a standard methodology and tracking process of visitors and their economic impact to Orange County.</td>
</tr>
</tbody>
</table>

1. DESTINATION RESEARCH STRATEGIES

- The purpose of the annual economic impact and visitor profile research initiative is to identify the economic impact of tourism in Orange County, California
- Present those economic impacts in sectors that allow for comparison to other industries, e.g. business sales, employment, wages and tax generation
- The research study is also intended to broaden awareness and understanding of tourism in Orange County and to assist policymakers in making informed decisions regarding the funding and prioritization of tourism development

**Destination Research Tactics**

- Implement county-wide visitor volume, economic impact and visitor profile study annually to measure the economic impact of tourism to Orange County
- Partner with Visit California to ensure parity in visitor volume metrics from the state and county levels
- Provide city-specific economic impact, visitor volume and visitor profile reports to participating destination-marketing organizations within Orange County.
H. SALES & MARKETING INITIATIVE

SALES & MARKETING PLAN

OBJECTIVE: Increase the quality, results, accountability and overall communications across all initiatives among all participating partners, OCVA staff and all external agency/in-country representative firms to streamline destination storytelling, messaging, results, accountability and return on investment back to all participants.

1. SALES & MARKETING STRATEGIES

- Develop three-year *OCVA Destination Marketing Plan* with ROI-focused goals, strategies and tactics
- Develop an *OCVA Annual Marketing Workplan* with annual updates, revised goals, new research and new objectives, strategies and tactics
- Develop new *incubator strategy* to explore new markets (Japan, India & South Korea)
- Hire a new position focused on marketing to take responsibility for appropriate marketing, planning, communications and improved reporting
- Cultivate new *marketing leadership* for effective plan implementation, management, measurement, and reporting/communications back to stakeholders
- Streamline *reporting, metrics and results* back to stakeholders
- Streamline *global messaging, content and promotions* across all initiatives
- Continue the participation with the joint OCVA/Disney and participating partners with *U.S.-based receptive tour operators* to gain market share against competing California destinations/attractions

Sales & Marketing Tactics

- Every three years launch a partner-led, inclusive approach to develop an OCVA Destination Marketing Plan that includes ROI-focused goals, strategies and tactics
- Annually, create a smaller OCVA Annual Marketing Workbook
- Continue a process to evaluate and approve new markets for consideration as incubator markets
- Hire a new contractor to serve as the head of sales and marketing to implement the OCVA Annual Marketing Workbook annually, manage initiative, measure results and communicate reporting and ROI back to participating stakeholders
- Develop a new, streamlined reporting process back to participating partners
- Streamline global messaging, promotions and content to impact business during need periods or as markets indicate
- Work with a select U.S.-based receptive tour operators to create packages, destination FAMs, new initiatives and other promotions to gain market share against competing California destinations
I. EDUCATION INITIATIVE

EDUCATION MARKETING PLAN

OBJECTIVE: Increase Orange County knowledge, understanding and awareness of global tourism and hospitality issues.

2. EDUCATION INITIATIVE STRATEGIES

- Education is a vital component of OCVA's body of work, because it integrates the findings of the research study with the efforts of the advocacy initiative to promote the economic impact of tourism to members as well as local constituents.

- Additionally, the education initiative also emphasizes the importance of global readiness with training and cultural awareness programs.

- The annual conference serves as a platform to showcase the results produced by the organization to members and local policy makers.

Education Initiative Tactics

- Create market-ready videos to educate the Orange County tourism/hospitality community on the cultural nuances, preferences and importance of each geographic initiative market

- Create, market and promote an OCVA Annual Tourism Conference to:
  - Educate local hospitality/tourism industry, elected officials and the business community as to the value of tourism to Orange County
  - Tout the achievements and results of the organization and the combined OC tourism community and all of its collective partners
  - Educate the local hospitality/tourism industry, elected officials and the business community about the latest trends, research and market intelligence to better prepare and equip OCVA stakeholders with new information

- Explore creating and launching a new education/advocacy bus that could travel to various Orange County locations and events to promote the value of tourism, educate residents/business about Orange County destination/attraction product knowledge and assist with potential workforce development opportunities
J. ADVOCACY INITIATIVE

ADVOCACY MARKETING PLAN

OBJECTIVE: Develop stronger appreciation, understanding and support for Orange County’s tourism and hospitality industries—at the local, regional, national and international levels.

1. ADVOCACY INITIATIVE STRATEGIES

- Develop an expanded advocacy program with clearly outlined priorities will help educate Orange County residents, media, and elected officials/policymakers about the positive role tourism plays in the local community.

- Advocacy will encompass both local and national efforts to affect positive change for tourism/hospitality policy from D.C. to The OC.

- Advocate for additional OCVA funding from Orange County cities/partners that do not currently have official destination-marketing organizations.

Advocacy Initiative Tactics

- Develop new Elected Official Relations Tactics to reach key policymakers (nationally, statewide, countywide and locally) to advocate for better, stronger tourism/hospitality policy at all levels

- Promote new policy research and data to showcase Orange County’s value of tourism to all audiences

- Utilize media relations at all levels to advocate for a strong tourism/hospitality industry in Orange County

- Utilize special events to advocate for a strong tourism/hospitality industry in Orange County
III. GOVERNANCE SECTION DIVIDER

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Forward Together.
A. EXECUTIVE OFFICERS

Chairman: Jay Burress, President & CEO - Visit Anaheim
Vice-Chairman: Shaun Robinson, General Manager - Hilton Anaheim
Treasurer: Russ Kline, Director of Account and Market Development - American Express
Secretary: Paulette Lombardi-Fries, President - Travel Costa Mesa
Kelly Miller - Director of Advocacy

B. BOARD OF DIRECTORS

American Express: Russ Kline, Director of Account and Market Development
Anaheim Marriott: John Kalinski, General Manager
Anaheim Resort Transportation: Diana Kotler, Executive Director
Balboa Bay Resort: Sam El-Rabaa, General Manager
BEST - VIP Chauffeured: Todd Szilaghi, Chief Operating Officer
Bowers Museum: Peter Keller, President
CBRE Hotels: Bruce Baltin, Managing Director
Cal State University, Fullerton: Dr. Ellen Kim, Director, Center of Entertainment & Hospitality Management
Certified Folder Display Services, Inc.: Patrick Fearn, President
Chapman University: Joe Slowensky, Vice Provost for Institutional Effectiveness & Faculty Affairs
City of Garden Grove: Greg Blodgett, Senior Project Manager
Costa Mesa Marriott: Marina Dutton, General Manager
Destination Irvine: Wendy Haase, Director of Tourism Marketing
Disneyland Resort: Lynn Clark, Vice President, Disneyland Resort Sales
Great Wolf Lodge: Tony Bruno, General Manager
Hilton Anaheim: Shaun Robinson, General Manager
Hilton Waterfront Beach Resort: Kamran Enayat, Director of Marketing
Historic Mission San Juan Capistrano: Barb Beier, Development Director
Hyatt Regency Huntington Beach: Peter Rice, General Manager
Hyatt Regency Newport Beach: Sid Ramani, General Manager
Irvine Company Retail Properties: Diana Parsel, Tourism Manager, Fashion Island & Irvine Spectrum
Irvine Marriott: Kandee Anderson, General Manager
Fashion Island Hotel: Gerard Widder, General Manager
John Wayne Airport: Rick Francis, Assistant Airport Director
Knott's Berry Farm: Chelle Rupp, Director of Sales & Marketing
Laguna Strategic Advisors: Ed Fuller, President
Lido House-Autograph Collection: Adam Beer, General Manager
Marriott Irvine Spectrum: Diane Markis, General Manager
Monarch Beach Resort: Ian Pullan, General Manager
Montage Laguna Beach: Anne Marie Doyle, Director, Sales & Marketing
Newport Beach Marriott Bayview: Charles Cho, General Manager
Orange County Board of Supervisors-1st District: Andrew Do, Supervisor
Orange County Board of Supervisors-2nd District: Michelle Steel, Chairwoman
Orange County Board of Supervisors-3rd District: Donald Wagner, Supervisor
Orange County Board of Supervisors-4th District: Doug Chaffee, Supervisor
Orange County Board of Supervisors-5th District: Lisa Bartlett, Supervisor
Orange County Fair & Event Center: Michele Richards, Chief Business Development Officer
Orange Coast College: Brenda Shine, School of Hospitality, Travel & Tourism
Orange Coast Magazine: Chris Schulz, Publisher
OC InRoom Magazine: Jennifer Larsen, Publisher
Newport Beach Marriott Resort & Spa: Debbie Snively, General Manager
Pacific Symphony: Tammy Peng, Director of Marketing and Communications
Pelican Hill Resort: Tom Donovan, Managing Director
Red Lion Hotel Anaheim: Rod Hurt, General Manager
Richard Nixon Foundation: William Baribault, President & CEO
The Ritz-Carlton, Laguna Niguel: Bruce Brainerd, General Manager
South Coast Plaza: Sarah Kruer, Director of Tourism Development
Surf & Sand Resort: Joanna Bear, General Manager
TravelBlogPro.com: Judy Bijlani, Tourism Consultant
Travel Costa Mesa: Paulette Lombardi-Fries, President
Transportation Corridor Agencies (The Toll Roads): Lisa Ganz, Communications Marketing Specialist
University of California, Irvine: Ria Carlson, Associate Chancellor, Strategic Communications & Public Affairs
U.S. Commercial Service, U.S. Department of Commerce: Jim Mayfield, Director
Visit Anaheim: Jay Burress, President & CEO
Visit Buena Park: Sara Copping, Director
Visit Dana Point: Jonny Westom, Executive Director
Visit Laguna Beach: Ashley Johnson, President & CEO
Visit Newport Beach: Gary Sherwin, President & CEO
Wells Fargo: Janet Wiesen, Investment Advisor & Broker
WHERE Magazine: Jeff Levy, Publisher

C. ADVISORS

Orange County Film Commission: Janice Arrington, Film Commissioner
County of Orange: Jessica Witt, Administrative Manager

D. EXECUTIVE MANAGEMENT

Ed Fuller: President & CEO
Micky Rucireta: Senior Vice President, Administration & Operations
Sharon Sola: Director, Destination Events
Christy Teague: Director, Destination Events
Susan Thronson: Senior Vice, Marketing
Brandon Young: Finance Director
Brenda Shelton: Executive Administrative Assistant
E. OCVA MARKETING COMMITTEE

Sarah Kruer - Co-Chair  Newport Beach & Company
Doug McClain - Co-Chair  Newport Beach & Company
Charles Harris - Incoming Co-Chair  Visit Anaheim
Ashley Johnson - Incoming Co-Chair  Mission San Juan Capistrano
Barb Beier  Visit Laguna Beach
Sara Copping  Visit Buena Park
Katy Dennis  Newport Beach & Company
Wendy Haase  Destination Irvine
Erica Hewitt  Disneyland Resort
Diana Parsel  Irvine Company Retail
Anne-Marie Schiefer  Visit Laguna Beach
Susan Thomas  Visit Huntington Beach
Deanne Thompson  John Wayne Airport
Jenny Wedge  Travel Costa Mesa
Tania Weinkle  Visit Anaheim
Jonny Westom  Visit Dana Point