



Market Overview

UK & Ireland

Market Overview



- California's top overseas market
- Record year up to October 2008
- 2009 ROI is \$42
- For 2010 bookings are up
 - Pattern is lengthening
 - Airline yields strengthening
- California is now a value destination
 - 30% difference between Europe
- U.K. economy feel-good factor is back
 - 9 months of house price increases
 - New government in May



Market Strategies



- Build on good work achieved in 2009
- Inspire, Inform, Engage, Act
- Continue to target key demographic sectors
- Increase length of stay through showcasing diversity
- Protect market share in very competitive environment
- Continue advertising to steal share of future

2010/11 Programs and Strategies




Brand Advertising

- Launch new TV creative with heavyweight media
- Create two TV sponsorship partnerships:
 - National Geographic & California Film Season
- Use online and social media platforms to build engagement with a Web-savvy U.K. population
- Pull in airlines and tour operators to provide call to action

2010/11 Programs and Strategies

Integrated Comms

- Continue press advertising with the “True Californian” brand platform
 - Use spend to leverage editorial
 - Target London more via outdoor advertising to reach the most affluent
 - Get U.K. travel trade to “sing our tune”
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2010/11 Programs and Strategies

Travel Trade

- Increase travel trade campaigns
 - Focus more activity on agent level activity to keep California top-of mind among booker level
 - Online & offline training program, incentives, travel trade advertising, agent road shows
 - Continue sales and media missions and California trade events to ensure trade relationships prosper
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