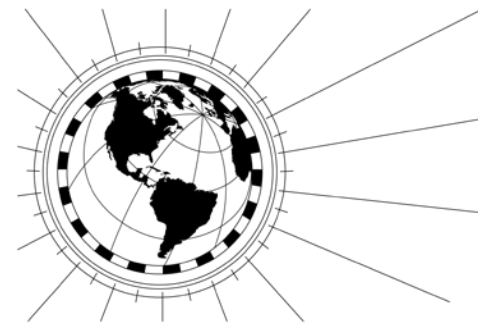


United Kingdom



There has been a 20% increase in U.K. long-haul outbound travel over the past five years. In 2008, the U.K. market accounted for 818,000 visitors to California, spending \$865 million. Visitation to California is still below pre-September 11 volume, and there is room for significant growth. Recently, the election of President Obama has created a more favorable public opinion of the U.S. and travel to the U.S. in general.

After two years of continued advertising in the U.K., the consumer knows more about the benefits of vacationing in California. CTTC has found that 71% are aware of California advertising, which generated a 1.8% increase in incremental travel. That breaks down to 177,000 incremental trips, or \$670 million in incremental spend - resulting in an ROI of \$130.