

CALIFORNIA LUXURY INITIATIVE

CALIFORNIA

THE GOLDEN STATE OF LUXURY

visit
California™



FOREWORD

Welcome to The Golden State of Luxury

Luxury travelers have long embarked on countless journeys to California over the years to bask in our majestic vistas, delight in our culinary wonders, and unwind at our breathtaking resorts. This audience continues to be captivated by our own unique brand and seemingly endless supply of laid-back luxury experiences—and really, who can blame them?

Now, Visit California has embarked on a new journey of its own. Working closely with our industry partners, we are elevating California's luxury travel product under one unified brand:

The Golden State of Luxury.

This white paper outlines the many insights we have gleaned about this audience and lays out our approach to engaging this demographic. As you will see, California's unparalleled inventory of luxury experiences—refined, authentic, exclusive, and highly fulfilling—are perfectly aligned with what motivates the luxury traveler.

We are just beginning this exciting journey and look forward to working with all our industry partners to share intelligence and refine our strategy as we move forward together.

Dream Big,



Caroline Beteta, President & CEO, Visit California

CALIFORNIA LUXURY INITIATIVE EXECUTIVE SUMMARY

In 2016, Visit California expanded its global marketing program to provide greater support for the state's luxury sector. As the first major initiative since passage of the Dream Big Dividend, Visit California is committed to actively increasing luxury travel to California, supporting individual industry stakeholder efforts through a multi-year endeavor that includes an integrated mix of promotional activity across paid, owned, earned and travel trade channels.

With increased funding, Visit California looked beyond its global brand target that takes into consideration age, income and travel propensity, to identify new opportunity target audiences. Strategic Marketing & Research Insights (SMARI) research revealed high-income households, while not a volume segment, represented a high-value visitor segment for California. In 2014, this Super Affluent segment accounted for 3 percent of visitation and 14 percent of spending. To better understand the size of the Super Affluent audience in all its Tier 1 markets (United States, Canada, United Kingdom, Australia, Mexico and China), Visit California used global media agency Carat's proprietary consumer insights study (CCS). From this audience-sizing analysis, three Tier 1 markets were identified as priorities for an integrated luxury campaign — the United States, Canada and the United Kingdom. Within the luxury space, High Net Worth and Ultra High Net Worth Individuals are key luxury segments with distinct preferences for how they build a relationship with and experience a luxury travel destination.

California is positioned to offer a different kind of luxury, one that is tied to the state's distinct lifestyle and brand. Through a robust planning process, including immersion in editorial content around California luxury; research and analysis of digital content best practices among luxury brands; and competitive review and exploration of key themes, ideas and concepts, Visit California has established an ownable luxury positioning platform.

**CALIFORNIA “LAID-BACK LUXURY”:
WITH A DISTINCT VIBE AND
UNPARALLELED ROSTER OF
UPSCALE TRAVEL EXPERIENCES,
CALIFORNIA IS A PLACE THAT
OFFERS A UNIQUE KIND OF LUXURY
WITHOUT PRETENSE.**

Shaped in partnership with the luxury tourism industry, the California Luxury Initiative is designed to build top-of-mind awareness and fuel discovery among this high-value audience by targeting travelers — from the Super Affluent to the Ultra High Net Worth Individual — through a \$4 million year-one investment across travel trade, owned, earned and paid media channels. Visit California will measure success through its annual SMARI research program to inform future programming.

CALIFORNIA LUXURY POSITIONING

California offers a unique kind of luxury, one that is tied to its impressive roster of high-end travel experiences, distinct lifestyle and brand.

POSITIONING

LAID-BACK LUXURY, OR LUXURY
WITHOUT PRETENSE

KEY MESSAGING

CALIFORNIA'S DISTINCT VIBE
COMBINED WITH AN UNPARALLELED
ROSTER OF UPSCALE TRAVEL
EXPERIENCES DELIVERS A UNIQUE
KIND OF LUXURY: LAID-BACK LUXURY.

BENEFIT

STYLISH LUXURY DELIVERED IN A
RELAXED, INFORMAL MANNER.

Underlying the California Laid-Back Luxury message and benefit is a guiding philosophy — a set of values and principles that influences California's luxury product and experience.

- **Be LAID-BACK/CASUAL/RELAXED:** We are influenced by our surroundings, taking cues from nature to create indoor/outdoor harmony and a sense of effortless hospitality and elegance.
- **Be UNBURDENED BY TRADITION: PIONEERING/ORIGINAL/INNOVATIVE/A GAME CHANGER:** We are open and collaborative, part of a community where sharing new ideas is celebrated. We are champions of environmental sensitivity and design innovation.
- **Be COMMITTED TO HEALTH & YOUTHFULNESS:** We believe in being your best self regardless of age, and view healthy living as a religion.
- **Be a CONDUIT TO SELF-DISCOVERY:** We believe in curiosity and the pursuit of lifelong learning.
- **Be APPROACHABLE/AUTHENTIC/GROUNDED but IRREVERENT/PLAYFUL:** We are serious about our pursuits, but we don't take ourselves too seriously.
- **Be a CULINARY TRENDSETTER:** We embrace our local bounty and seek to continually reinvent/redefine "California cuisine."

While there are many United States and international destinations that offer luxury experiences, discernible positioning approaches are few. Compared to the luxury goods product category, destinations appear less likely to create distinct or differentiated positioning targeted specifically to a luxury audience. This provides a unique competitive advantage for California.

Through a competitive audit of domestic and international luxury destinations, including New York, Hawaii, Florida, the United Kingdom, Italy and Australia, Visit California confirmed the strength and uniqueness of “Laid-Back Luxury.” While not an exhaustive list, these destinations were chosen because they possess relatively high visitation or preference among the Super Affluent target, determined from analyzing primary and secondary research.



DELIVERING ON CALIFORNIA LAID-BACK LUXURY

Superior quality, authenticity, exclusivity and meaningful experiences are all key aspects of what motivates the Super Affluent target audience, and California delivers on these in a variety of ways.

SUPERIOR QUALITY

- Distinctive California design: hotels/resorts, spas, restaurants, fashion, consumer products
- Best of “California cuisine”: fresh, seasonal, local, sustainable, original
- Commitment to innovation
- Relaxed, refined service

AUTHENTICITY

- Unique and distinctive locations, cuisine and accommodations
- Unencumbered by tradition or excessive packaging

EXCLUSIVITY

- Egalitarian but still exclusive – private tours, exclusive tastings, etc.
- Exclusive local experiences and activities in the Golden State’s most scenic locales

MEANINGFUL EXPERIENCE

- Being a part of an iconic laid-back lifestyle and culture
- Seeking holistic health – spiritual spa experiences, learning about biodiversity/sustainability in wine and food

California boasts an impressive roster of luxury travel experiences, from world-class resorts that span the spectrum of size, shape and stature, to one-of-a-kind culinary offerings with global acclaim, to the wholly unique culture and entertainment landscape that is part of the state’s DNA. While this distinct set of product offerings is alluring on its own merits, what makes it even more compelling is the essence of California that surrounds it – the promise that the most discerning travelers can access laid-back luxury.

Exhibit A represents a range of product experiences that embody the essence of laid-back luxury across categories. Derived from third-party research, including a wide range of luxury travel publications, this sampling is illustrative and not intended to be exhaustive.

EXHIBIT A

| PRODUCT EXPERIENCE | LAID-BACK LUXURY EXPERIENCE CAN INCLUDE* | QUINTESSENTIAL OFFERINGS |
|--|---|--|
| <p>CULINARY</p>  | <ul style="list-style-type: none"> • Celebrating and experiencing the best of California cuisine • Highly rated chefs and restaurants • New approaches to California cuisine • Exclusive tasting and dining experiences • Culinary experience delivered in a casual, subtly sophisticated setting, with high-level service | <ul style="list-style-type: none"> • Farmhouse Inn • The Restaurant at Meadowood • Aubergine Restaurant at L'Auberge Carmel • Studio, Laguna Beach • Providence, Los Angeles • French Laundry • George's at the Cove • Manresa • Benu |
| <p>OUTDOOR</p>  | <ul style="list-style-type: none"> • Immersing yourself in the "epic beauty" and "staggering" views of the California outdoors • Receiving "top-notch tutelage" and equipment for your activity/ outdoor pursuits • Combining your outdoor experience with the best of California food, five-star accommodations and service | <ul style="list-style-type: none"> • Pebble Beach • Backroads Wine Country Bike Trips • Belmond El Encanto Kayaking Adventure • Fairmont San Francisco America's Cup Yacht Experience • The Majestic Yosemite Hotel's Bracebridge Dinner |
| <p>RESORTS</p>  | <ul style="list-style-type: none"> • Hotel/resort settings that emphasize California's incredible outdoors • Being inspired by the Hollywood stars that have graced a property in past years • Being energized by a new boutique hotel that tells a story of a city "through design" • Sophisticated subtlety of design and a "casual" atmosphere • High-quality "locally sourced" cuisine • High-level but relaxed service, "effortless hospitality" | <ul style="list-style-type: none"> • The Resort at Pelican Hill • La Quinta Resort • Biltmore Four Seasons • Meadowood Napa Valley • Fairmont Miramar • Auberge du Soleil, Rutherford • Hotel Bel-Air • Post Ranch Inn • Terranea Resort • Bacara Resort & Spa • Ritz-Carlton, Lake Tahoe • Hotel Del Coronado |
| <p>SPAS</p>  | <ul style="list-style-type: none"> • Spa setting that draws from California's incredible outdoors • Being inspired by the Hollywood stars who have graced a property in the past • Spa treatments inspired both by differing cultures & local bounty (e.g. local produce) • California's approach to health and wellness; "health as religion"; "holistic" and "spiritual" • Advice and treatments from expert nutritionists and body workers • High-level, relaxed service; 'effortless hospitality' | <ul style="list-style-type: none"> • The Health Spa at Meadowood • The Spa at Pelican Hill • La Quinta Resort • Cavallo Point • Rancho Valencia Resort & Spa • Golden Door • Fairmont Sonoma Mission Inn • The Ranch at Malibu • Hotel Bel-Air Spa • Spa at Pebble Beach • Post Ranch Spa, Post Ranch Inn |

*QUOTED EDITORIAL DESCRIPTIONS

CALIFORNIA LUXURY INITIATIVE TARGET AUDIENCE

AUDIENCE SEGMENTS & SIZING

As shown in Exhibit B, Visit California's luxury target spans a range of economic profiles that break down into three audience target sub-segments: Ultra High Net Worth Individuals, High Net Worth Individuals and Super Affluent.

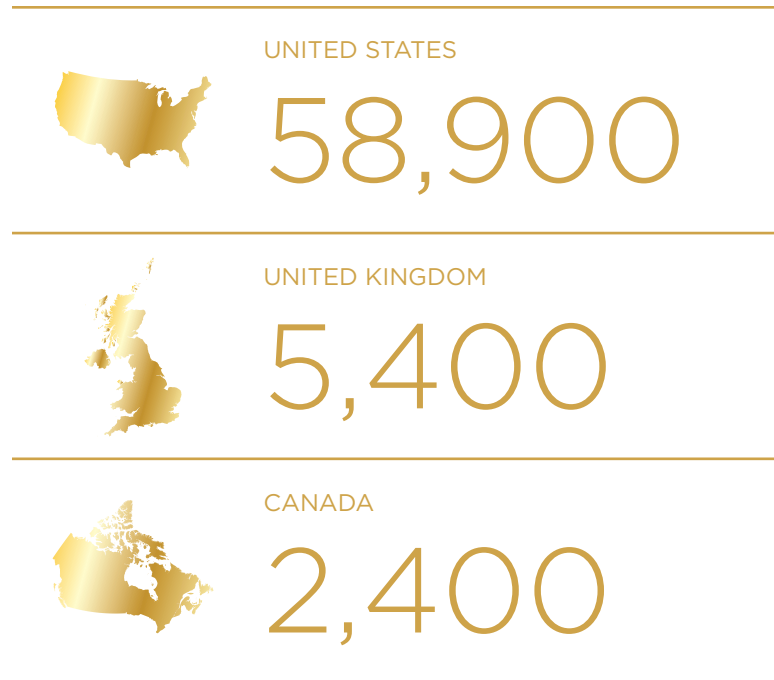
EXHIBIT B

| AUDIENCE SEGMENT | ECONOMIC PROFILE |
|---|---|
| ULTRA HIGH NET WORTH INDIVIDUALS (UHNWI) | \$50+ MILLION NET WORTH As defined by Credit Suisse |
| HIGH NET WORTH INDIVIDUALS (HNWI) | \$1 MILLION TO \$50 MILLION NET WORTH As defined by Credit Suisse |
| SUPER AFFLUENT | \$534K+ MEAN HHI (\$250K+ MINIMUM HHI) Ultra Affluent as defined by Ipsos |

ULTRA HIGH NET WORTH INDIVIDUALS (UHNWI)

There are varying opinions as to the threshold for an Ultra High Net Worth Individual. Credit Suisse defines Ultra High Net Worth Individuals as possessing \$50 million or more in net assets. Below are estimated numbers of UHNWI in the United States, Canada and the United Kingdom.

MARKET NUMBER OF UHNWI

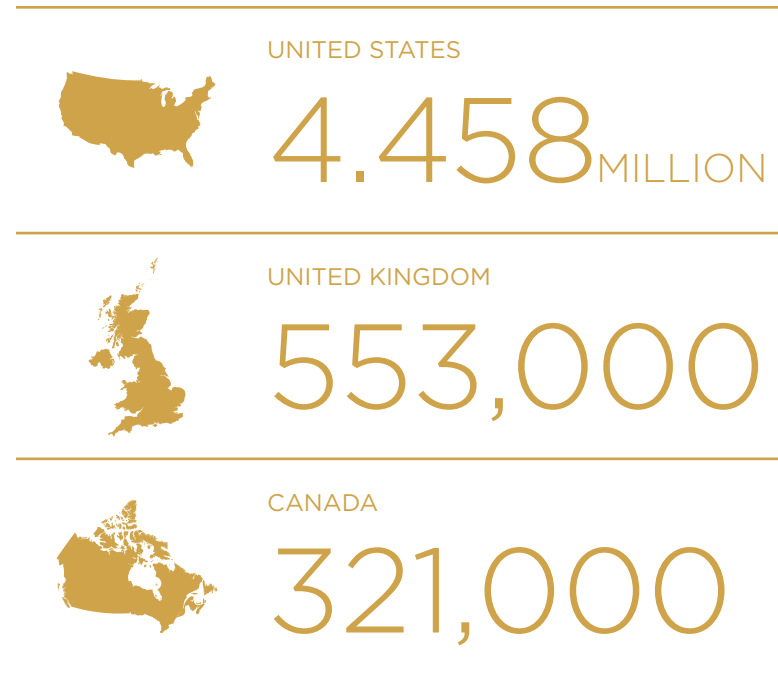


Source: Credit Suisse Global Wealth Report, 2015

HIGH NET WORTH INDIVIDUALS (HNWI)

High Net Worth Individuals are defined by Capgemini, among others, as possessing a minimum investible wealth of \$1 million. Below is the estimated number of minimum High Net Worth Individuals in the United States, Canada and the United Kingdom. (Note: UHNWI are included in these figures.)

MARKET NUMBER OF HNWI



Source: Capgemini World Wealth Report, 2016




SUPER AFFLUENT

To understand the size of the Super Affluent audience in all Tier 1 markets where Visit California invests in brand advertising programs, Visit California used global media agency Carat’s proprietary consumer insights study (CCS). The Super Affluent segment was measured as a percentage of Visit California’s global brand target audience base. In addition to age and income, this audience has traveled abroad at least once in the past year for vacation/holiday. From the audience-sizing analysis, three Tier 1 markets were identified as priorities for the California Luxury Initiative — the United States, Canada and the

United Kingdom. Exhibit C below shows the number of Super Affluent, along with the percentage of the Super Affluent audience versus the total population.

With the minimum entry point at \$250,000 household income, Visit California also sought to understand mean household income. Ipsos data showed that mean household income is \$534,000 for the group whose minimum household income is \$250,000. (Ipsos calls this audience segment the ‘Ultra Affluent.’)

EXHIBIT C

| MARKET | NUMBER OF SUPER AFFLUENT | % SUPER AFFLUENT VS. TOTAL POPULATION | SUPER AFFLUENT MILLENNIAL | SUPER AFFLUENT MATURE (GEN X/ BOOMERS) |
|---|--------------------------|---------------------------------------|---------------------------|--|
|  | 6.697 MIL | 3% | 30% | 70% |
|  | 1.145 MIL | 2% | 38% | 62% |
|  | 289,000 | 1% | 30% | 70% |

Source: CCS 2014 Benchmark study (US); CCS 2014 International Benchmark study (UK); CCS 2014 Canada Benchmark study, 2014 Roy Morgan/CCS

AUDIENCE PROFILE & INSIGHTS

A range of primary and secondary data sources were employed to analyze the luxury audience and market, including research reports by Time Inc./YouGov and the Beverly Hills Conference and Visitors Bureau; Visit California's Confident Connoisseur and Cultured Cosmopolitan personas; and primary research conducted by SMARI into Tier 1 international markets. The latter research source provided a global viewpoint with which to consider the luxury audience. The following audience profile and insights emerged from a research focus on the Super Affluent segment of the luxury audience; however, many of the reports read and analyzed as part of this research covered the luxury industry and related audience as a whole.



OVERALL ATTITUDE & BEHAVIOR

The Super Affluent possess core distinguishing attitudes and behaviors in the travel category, and while there are some nuances based on age (Millennial versus Mature), there is more that unites than separates, including high disposable incomes and a passion for travel. As experienced frequent travelers who live life to the fullest, they are sophisticated consumers accustomed to a range of luxury travel experience types that provide both high quality and a certain level of exclusiveness, but are not necessarily ostentatious. Motivated by discovery and the opportunity for self-indulgence, personal reward and connection (including family time), they seek new and fulfilling experiences that are unique and authentic. They are active travelers with a range of vacation interests that include culinary experiences, the outdoors, sports, shopping and culture. Financially astute, they recognize the value of paying for quality. While they may seek travel inspiration from peer-like influencers, they like to believe they have discovered new experiences through their own research. While Millennials represent a smaller percentage of the Super Affluent target, it is worth considering nuances by age. Exhibit D and Exhibit E demonstrate what unites and separates Millennials versus Matures when it comes to key motivators and digital use.

EXHIBIT D

SUPER AFFLUENT MOTIVATION:

What unites and separates in the Luxury category

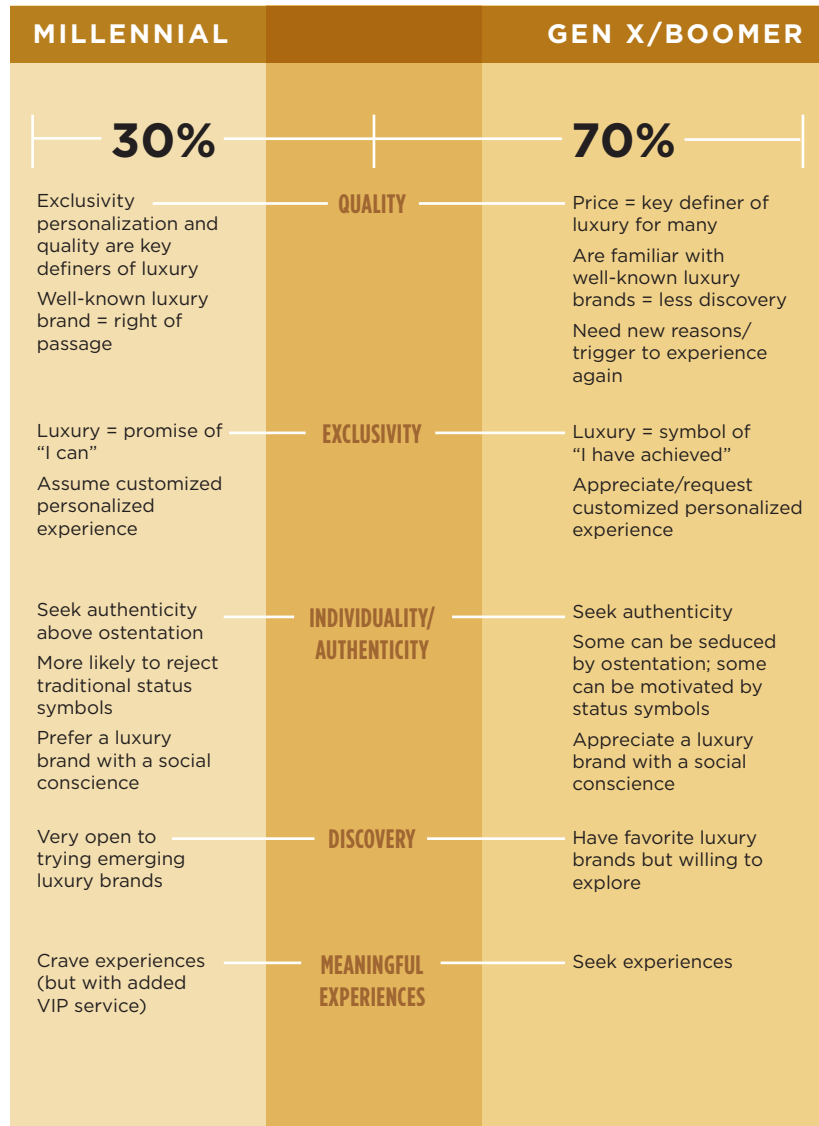
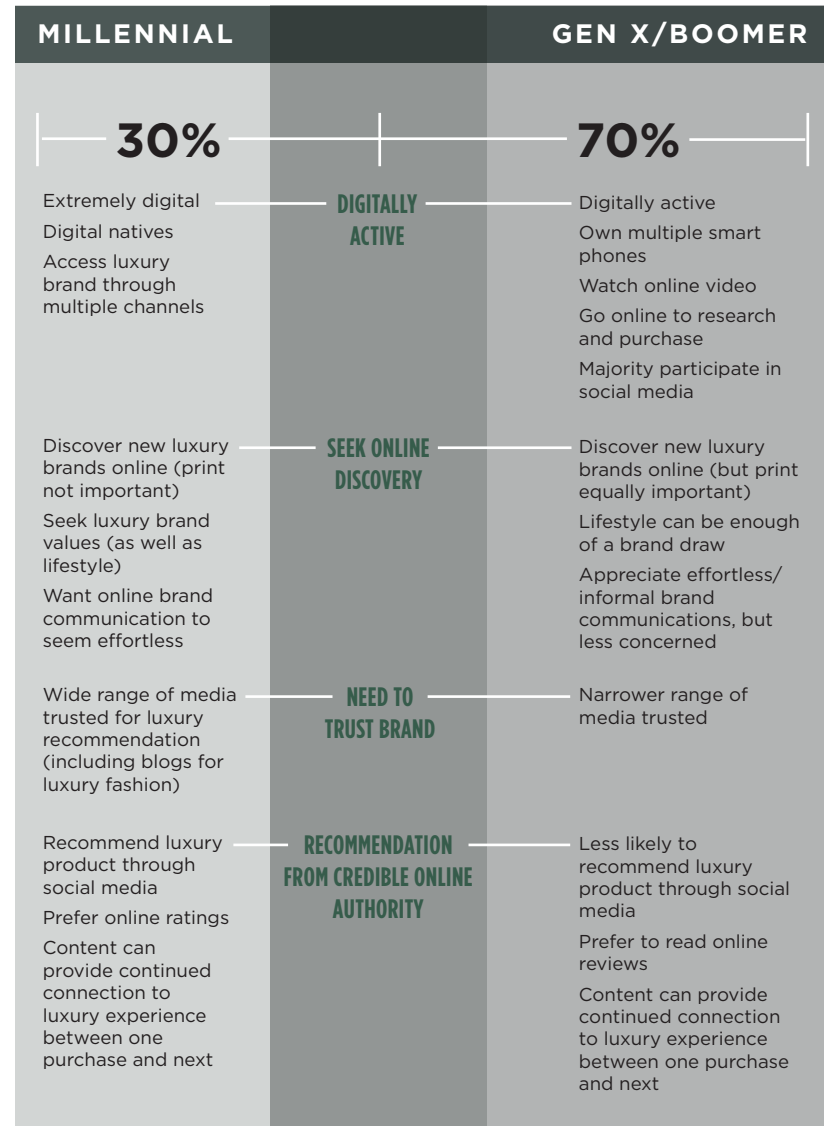


EXHIBIT E

SUPER AFFLUENT DIGITAL USE:

What unites and separates in the Luxury category



PRODUCT EXPERIENCES

California luxury product experiences can change depending on what luxury sub-segment the traveler occupies. The Super Affluent traveler experiences largely published luxury experiences, while the High Net Worth Individual experiences additional customization and the Ultra High Net Worth Individual can access complete exclusivity.

Super Affluent travelers seek Exclusivity, Quality, Individuality/ Authenticity, Discovery and Meaningful Experiences. They seek uncommon travel experiences personalized to their needs and they want to fully immerse themselves in their travel environment. This luxury audience often has a vacation type in mind (wellness,

relaxation/unplugged, family trip). Within this, Visit California has observed some recent trends. First, while exclusivity is still key, uniqueness and authenticity are increasingly important. Second, family experiences are increasingly important. This is part of a larger trend in ever-widening ranges of luxury travel activities being offered, including cultural, volunteer and adventure-oriented trips. While culinary activity has always been a key part of the luxury experience, the range and type of culinary adventures are growing. Underlying these trends is a shift in luxury traveler benefit. Consequently luxury product offerings are increasingly positioned as providing intrinsic benefits such as self-fulfillment and self-discovery versus external status. Indeed many Super Affluent and high-end luxury travelers are seeking a low profile when they travel (with the exception of travelers from China and Mexico who may be more comfortable with demonstrating external wealth).

Sources: Bain & Company, Euromonitor, SKIFT, Time Inc/YouGov, Shullman, Google, American Research Center, Luxury Institute, Deloitte Luxury & Fashion, MMGY Global, Ipsos

| POSITIONING | LUXURY AUDIENCE SEGMENT | PRODUCT EXPERIENCE |
|-----------------------------|-------------------------|----------------------|
| CALIFORNIA LAID-BACK LUXURY | UHNWI | COMPLETE EXCLUSIVITY |
| | HNWI | CUSTOMIZED LUXURY |
| | SUPER AFFLUENT | PUBLISHED LUXURY |



“The mode of travel and type of accommodation used can vary from a 5-star hotel or a boutique property to a unique building or an eco-style lodge but the common theme is that the experience is a special one. True luxury is a great travel experience, enjoyed in relative comfort.”

- Steve Allen, Former Managing Director, WEXAS Tailor-made Travel



“Luxury travel today is defined less by thread count and Michelin stars and more by access to the people, places and experiences that represent all that is authentic about a destination. There’s no denying that comfort factors still apply and high standards of accommodation

and dining will always feature on the luxury traveler’s wish list. However, today’s luxury traveler seeks more depth of understanding and immersion into local culture than ever before. People don’t just want to see — they want to participate.”

– George Morgan-Grenville, Chief Executive Officer, Red Savannah



“Luxury travel does not just mean opulence, comfort and a plethora of amazing amenities on offer at a destination; it is the full journey of the traveler from the point they make that first phone call to discuss their needs. The service they receive, the knowledge of the

travel consultant, the journey to their port of call should all have an air of being a cut above before they arrive at a resort or location that will astonish. Luxury travel means you can sit back, relax and enjoy the experience safe in the knowledge that every aspect will surpass expectation.”

– Rory Pilkington, Managing Director, Bailey Robinson

PRODUCT DISCOVERY

TRADITIONAL & DIGITAL MEDIA

The Super Affluent target is a heavy user of traditional media, including television and magazines. Their interests span news, entertainment and sports, including golf and tennis. They use tablets and mobile devices to stay connected at work and at home. While social media experience sharers, they do not overshare.

They have a desire for a “sense of discovery” and are empowered to source their own luxury travel itinerary on and offline. This sense of discovery can be amplified through native advertising content and peer-like influencers who can be leveraged to deliver content.

TRAVEL TRADE

All segments of the luxury audience — from Super Affluent to Ultra High Net Worth Individuals — consult and book their vacation experiences through trusted sources. While travel trade relationships are important across the luxury travel audience, their importance rises as you move up toward High Net Worth and Ultra High Net Worth Individuals. No segment of the luxury audience wants to be “sold” to by travel trade, and higher-wealth clients do not need to know the specific price point of an

offering. Instead, they want to know the unique benefits and uncommon experiences prepared just for them. To accommodate these needs, there exists a broad range of travel trade service providers for luxury consumers. These service providers include travel advisors, travel agencies, tour operators, concierge services, personal travel assistants, and the like.

| POSITIONING | LUXURY AUDIENCE SEGMENT | PRODUCT EXPERIENCE | BOOKING METHOD |
|------------------------------------|-------------------------|----------------------|--|
| CALIFORNIA LAID-BACK LUXURY | UHNWI | COMPLETE EXCLUSIVITY | • PERSONAL ASSISTANCE |
| | HNWI | CUSTOMIZED LUXURY | • CONCIERGE • BOUTIQUE TOUR • REFERRAL SERVICE |
| | SUPER AFFLUENT | PUBLISHED LUXURY | • LUXURY TRAVEL ADVISORS |

CALIFORNIA LUXURY INITIATIVE MARKETING OBJECTIVES & STRATEGIES

The following goals and strategies draw upon insights into the Super Affluent target audience; best practices for communication in the luxury category; and the unique qualities and strengths of California's luxury positioning.

OBJECTIVES

The California Luxury Initiative focuses on fueling inspiration and desire for California's range of unique luxury travel experiences to achieve the following objectives:

1. Build top-of-mind awareness of California as a luxury travel destination, while positioning the state's unique style of luxury and bespoke luxury travel experiences.
2. Fuel discovery of California luxury content, deepening engagement and creating desire for the California luxury travel experience.



STRATEGIES

These objectives will be met through strategies that enhance California luxury storytelling:

1. Bring California Laid-Back Luxury to life through the lens of the state's lifestyle, culture and attitude.
2. Showcase California's abundance and incredible diversity of luxury offerings in close proximity (relative to global competitors); find fresh angles on more well-known product experiences; and illuminate lesser-known or new product experiences.
3. Amplify unique aspects of craftsmanship, creativity, environment and design expertise that go into creating California luxury experiences.
4. Frame California Laid-Back Luxury experiences in a way that implies intrinsic value (e.g. self discovery, health, wellness).
5. Highlight unique California experiences through memorable stories of local experts/peers.

COMMUNICATION CHANNELS

Visit California will deploy a range of marketing activity across paid, owned and earned media channels, as well as the travel trade. In the paid space, sponsored/native content will be a cornerstone, while earned and owned channels will act as support layers providing industry stakeholders with expanded content opportunities. As the luxury audience shifts upward in wealth, the importance of travel trade as a relationship-building channel increases.



| POSITIONING | LUXURY AUDIENCE SEGMENT | PRODUCT EXPERIENCE | LEAD COMMUNICATION CHANNEL |
|------------------------------------|-------------------------|----------------------|--|
| CALIFORNIA LAID-BACK LUXURY | UHNWI | COMPLETE EXCLUSIVITY | TRAVEL TRADE |
| | HNWI | CUSTOMIZED LUXURY | SPONSORED/NATIVE CONTENT TRAVEL TRADE |
| | SUPER AFFLUENT | PUBLISHED LUXURY | SPONSORED/NATIVE CONTENT |



CALIFORNIA LAID-BACK LUXURY PROGRAMMING

PAID MEDIA CHANNELS – SPONSORED/NATIVE CONTENT

To launch California Laid-Back Luxury, Visit California conducted an RFP process to establish relationships with two global media partners — Time Inc. and Condé Nast — to develop custom content programs that bring California’s distinct luxury positioning to life. Both partners utilized an editorial-driven approach that included a combination of entice and inform storytelling deployed through multiple channels to reach the Super Affluent target. Cornerstone to each media partner’s approach will be the use of brand ambassadors — noteworthy pioneers and influencers who have achieved success in their respective fields and act as guides for the discerning traveler, sharing their discoveries and providing an insider perspective on California luxury.

Brands across the Time Inc. and Condé Nast portfolios were tapped to create content, including editorial, photography and video, housed in immersive long-form digital experiences and promoted through social media, native placements, content seeding and other relevant drivers.

In 2016 a \$3 million year-one paid media program is being deployed in the designated priority markets — United States, Canada and the United Kingdom — and is anticipated to deliver more than 90 million impressions from September 2016 through March 2017.

A CASE FOR SPONSORED/NATIVE CONTENT

The Super Affluent audience continues to demonstrate stable readership and affinity for print magazines and luxury-focused niche digital platforms. Sponsored/native content is a newer digital tactic that luxury brands are increasingly using to create engagement with luxury consumers. Research and expert opinion affirms that sponsored/native content is an approach well suited to luxury audiences, and when employed correctly can be a very effective medium with this discerning audience. Findings do not indicate that socioeconomic levels are the deciding factor in audience opinions of sponsored/native content. Instead, research indicates that *quality*, *relevancy* and *transparency* are the keys determining factors in an audience’s positive regard and engagement levels with sponsored/native content.

Multiple luxury brands have created sponsored/native content with different publishers, including Tiffany, Porsche, Cartier, Sotheby’s and Mercedes Benz. Some, like Gucci and Cadillac, partner with a publisher to create a series of stories that run across multiple publishers. Others, like Cartier, partner with more than one publisher, each creating unique content. Examples of sponsored/native content include video, still images, and short-form and long-form written formats.

CALIFORNIA LAID-BACK LUXURY SPONSORED/NATIVE CONTENT

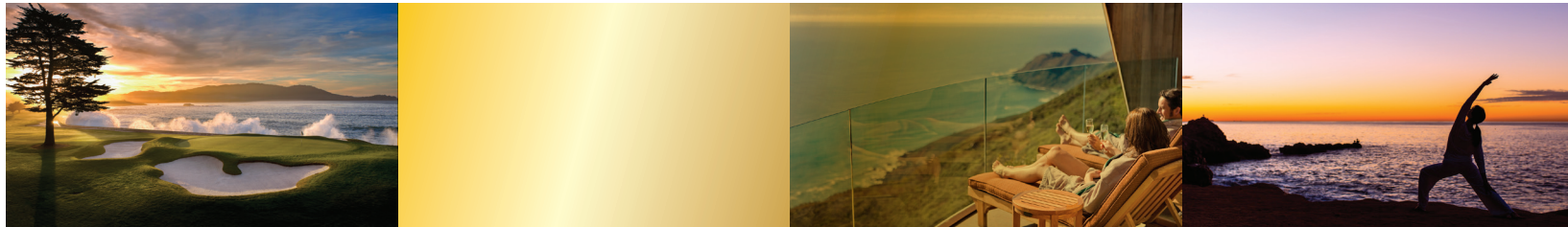
California Laid-Back Luxury storytelling will be approached through a blend of content that provides both inspiration and information.

ENTICE STORYTELLING

Includes content and editorial that spotlights California as the place for luxury without pretense — a distinct approach that springs directly from California’s DNA. At its core is California’s uniquely relaxed and approachable attitude toward living the good life, and our enthusiasm for the pursuit of passions. Though these stories can be told through the lens of an individual person or subject matter, they are intended to convey a sense of laid-back luxury on a higher attitudinal level that resonates with the Super Affluent target in meaningful ways.

INFORM STORYTELLING

Includes content and editorial that highlights unique luxury product and experiences found only in California — experiences that are joyful, authentic, adventurous, unstuffy, free-spirited and occasionally even irreverent. Inform storytelling acts as an “insider’s guide” to California luxury from trusted sources that help Confident Connoisseurs on their quest for discovery of “what’s next” and being “in the know.”





A core aspect of the storytelling approach will be a range of carefully selected brand ambassadors — trusted experts and thought leaders in luxury-relevant fields. California’s ambassadors will represent a cross-section of ages, experience and specialties. All will be respected in their fields, able to provide valuable wisdom and insight on a California Laid-Back Luxury product experience or category.

CALIFORNIA LAID-BACK LUXURY BRAND AMBASSADOR QUALITIES

- Approachable/grounded
- A trendsetter/original/creative
- An innovator/a visionary
- Self-made/entrepreneurial
- Passionate
- Known for something
- Have valuable knowledge/wisdom (regardless of age)
- Can provide genuine insight on an aspect of California Laid-Back Luxury
- Lighthearted/free-spirited/not bound by convention/playful — embodying the California attitude

TIME INC.

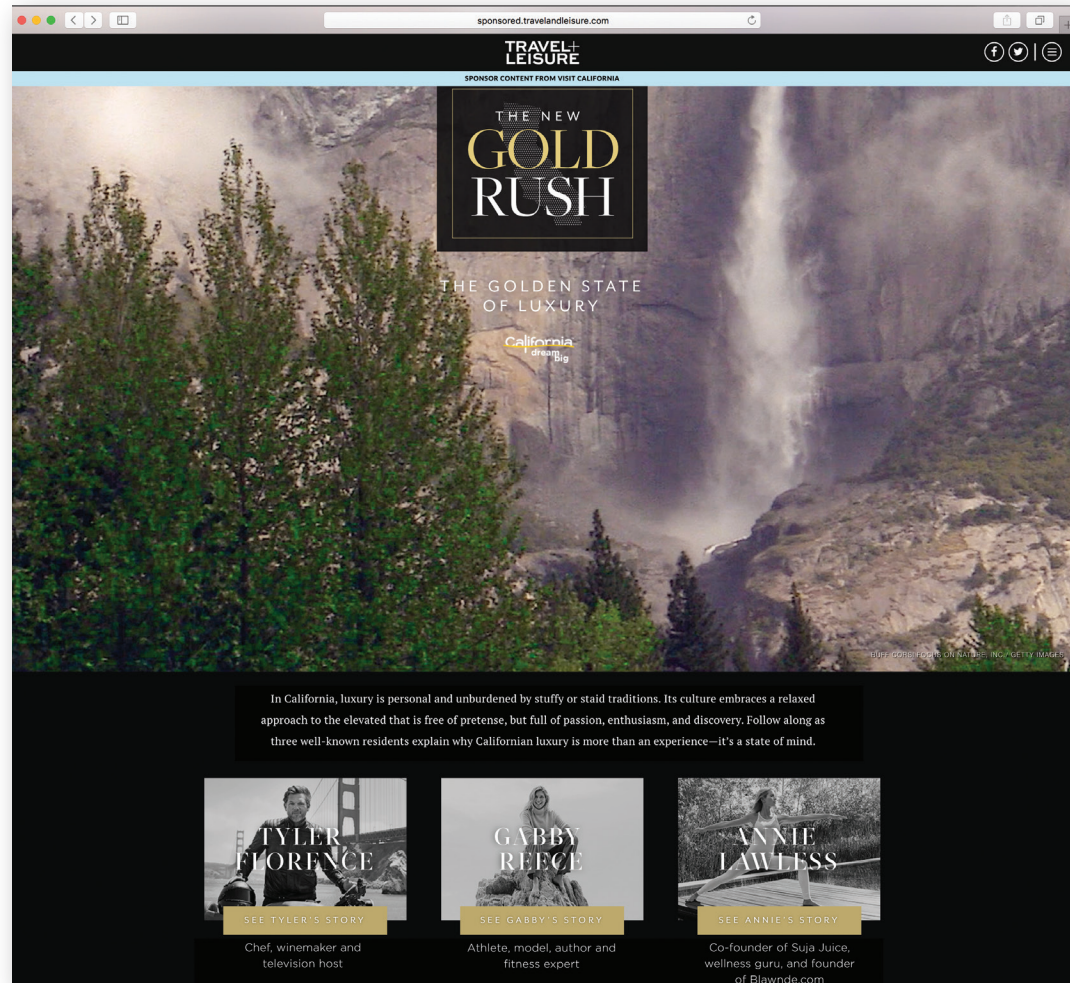
When miners discovered gold in the Sacramento Valley in 1848, tens of thousands of prospectors rushed to the Golden State in pursuit of instant, life-changing wealth. The state’s population quintupled in the space of two years—most of that attributed to the Gold Rush. Another immigration to California is currently underway. But this new movement is led by a group of people who have already amassed a fortune and are seeking a different kind of rush. They are entrepreneurs determined to create new business paradigms. They are creative and eager to escape their buttoned-up worlds for a looser, untucked aesthetic. They are successful people of diverse backgrounds— including many older Millennials—who find inspiration in majestic vistas and breathtaking sunsets, and the notion that anything is possible in California.

Time Inc. provides editorial innovation concepts that connect with Super Affluent readers and influencers authentically, capturing the spirit of California Laid-Back Luxury through each participating title’s unique perspective and initiating a cultural conversation to heighten awareness of the intrinsic value and benefits of California luxury.



TRAVEL+LEISURE, FORTUNE, DEPARTURES

Three Time Inc. titles — *Travel+Leisure*, *Departures*, and *Fortune* — were tapped to create sponsored/native content for a special “Editorial Innovation Series” featuring editorial, video and photography under the thematic umbrella of “The New Gold Rush.” Luxury ambassadors for the Time Inc. campaign include Tyler Florence (celebrity chef), Gabby Reece (pro athlete, model and fitness influencer) and Annie Lawless (entrepreneur and wellness influencer).



TRAVEL+LEISURE, FORTUNE, DEPARTURES

Through in-book advertorial spreads, videos and articles, each ambassador brings their unique California Laid-Back Luxury story to life. All content is housed in a custom long-form digital experience on travelandleisure.com with standard ad units, custom ad units, native touts and social ad units deployed to promote and drive traffic to each ambassador's respective long form content page. In addition to the core sponsored/native content, Time Inc. included pure editorial features that ran within *Travel+Leisure* and *Fortune's* print and online properties. These features were driven and created by the respective titles' editorial teams and served as added value to the program.

TIME INC. PROGRAMMING RECAP:

- September - March 2016
- (3) In-book Advertorial Spreads — (1) per title
- (3) Videos
- (15) Articles
- (1) Custom Long-Form Digital Experience on travelandleisure.com
- (2) Bonus Editorial Features





Advertisement

TYLER'S
FEAST FOR THE
SENSES

California

CELEBRATED CHEF, WINEMAKER, AND
TELEVISION HOST **TYLER FLORENCE** DELIGHTS
IN HIS ADOPTED HOME STATE'S OPEN VISTAS,
IDEAL CLIMATE, AND PURE LUXURY THAT PERFECTLY
SUIT HIS TASTE FOR THE BEST OF EVERYTHING.

"CALIFORNIA IS A SPECIAL PLACE TO COME AND REDISCOVER
yourself. It's a magical environment, full of people who have forged
their own paths," says Tyler, who has found his personal paradise
in Marin County. "One night I had dinner at **Boulevard** in San
Francisco and, driving back across the Golden Gate, I just fell in love.
I said, 'This is it. I want to live here.'"

"At **Wayfare Tavern**, we're lucky enough to entertain visitors
from all over the world." He says of his own standout San Francisco
restaurant. "I can explain to them exactly where every ingredient
comes from." Living and working in the birthplace of the farm-to-
table movement continually fuels his enthusiasm. "As a chef, I learn

so much being so close and connected to our community. I can
just hop on a motorcycle to visit the farms and vineyards. You can't
get that anywhere else."

"Two of my favorite getaways in the world—**Auberge du Soleil** and
Calistoga Ranch—are right here in Napa Valley. From the architecture
to the breathtaking vineyard vistas, the food, service, and spas, it's
all so well-crafted," he says. "California naturally cultivates a devotion
to craft, and everyone here contributes to this gracious, beautiful life.
But we can't ship this to your home; you have to physically be here.
This California experience is the best of everything. It's just great, un-
pretentious, easy-going and simple. It's a luxury that's here every day."

TO EXPERIENCE MORE OF TYLER'S CALIFORNIA AND GET HIS RECOMMENDATIONS
FOR LUXURY EXPERIENCES THROUGHOUT THE STATE, VISIT TRAVELANDLEISURE.COM/CALIFORNIALUXURY

CONDÉ NAST

California has always been the movie capital of the world, but now it is also the leader in fields that were once dominated by the East Coast or old Europe. Taking a laid-back approach that is quintessentially Californian to the luxury realms of fashion, art, food and music, these innovative new pioneers are at the forefront of the West's changing luxury landscape.

Acting as qualified guides for discerning travelers who seek to discover and experience California luxury, five Condé Nast ambassadors share first-person narratives of how they pioneered forward into undiscovered territory to reinvent the experience of luxury in California. Jennifer Meyer (jewelry designer), Sabrina Buell and Yves Béhar (art consultant and designer), Corey Lee (celebrity chef) and Aloe Blacc (musician) bring the California luxury ethos to life through their unique personal lens, sharing how—and where—they continuously feed their creativity in beautiful diary-like travelogues.



Jennifer Meyer
Jewelry Designer



Sabrina Buell
Art Consultant



Yves Béhar
Designer



Corey Lee
Restaurateur



Aloe Blacc
Musician/Singer/Songwriter

BON APPÉTIT, THE NEW YORKER, VANITY FAIR, VOGUE

“The New Pioneers of California” sponsored/native content series includes video, photography and long-form articles housed in custom-designed immersive digital experiences across *Bon Appétit*, *The New Yorker*, *Vanity Fair* and *Vogue*. Users will be invited to explore each influencer’s journey, including curated recommendations of California Laid-Back Luxury experiences. Additionally, these digital experiences will be housed on *Condé Nast Traveler’s* website, cntraveler.com. Similar to Time Inc.’s supporting paid media program, Condé Nast will create and distribute standard ad units, custom ad units, native placements and social touts to promote the custom program and drive traffic to each ambassador’s digital experience.

CONDÉ NAST PROGRAMMING RECAP:

- January – March 2017
- (4) Videos
- (4) Articles
- (4) Custom Long-Form Digital Experiences – housed across *Bon Appétit*, *Condé Nast Traveler*, *The New Yorker*, *Vanity Fair* and *Vogue*



TRAVEL TRADE CHANNELS

California's Laid-Back Luxury positioning works extremely well for the luxury travel trade. For those luxury travel advisors familiar with much of the state's product offerings there is agreement that a laid-back approach to life is a differentiator for California and of great appeal to clients. In terms of California's positioning to the trade, Visit California leverages the insight that luxury audiences seek both authenticity and exclusivity. Consequently, a key component of product presentation is a California lifestyle focus, including meeting the people who exemplify the lifestyle and are behind the unique experiences. (For example: highlighting a product offering that includes shopping at a farmer's market with the chef of a restaurant and hearing his/her stories directly as part of the experience.)



THE ENVIRONMENT



"...whilst the online proposition can be an asset in terms of booking more simple arrangements, clients looking for luxury experiential travel require a deep level of sophisticated knowledge and confidence during the sales process."

- George Morgan-Grenville, Chief Executive Officer, Red Savannah

Travel trade plays a strategic role in the luxury market, acting as an important influencer – more so in this audience segment than in any other – since financial obstacles are mostly removed and the value proposition for the luxury audience is about the personalization of authentic and exclusive experiences. Consequently, the luxury travel trade differs from mainstream trade in its desire to reflect clients' needs and wants in each planned itinerary, and to offer them truly unique experiences. In many cases, those who prepare the trip need to experience the product themselves before they actually offer it to a client.

LUXURY BOOKING CHANNELS – HOW TO WORK WITH LUXURY OPERATORS

Here are some strategies for working with luxury tour operators (many operate and manage product development differently to mainstream operators):

1. **HAND-PICKED PRODUCT** – product managers will want to hand pick hotels and visit them in person before adding them to their program. They will also want to spend quality time in a destination to research things to do outside of hotels and resorts.
2. **DIRECT CONTRACTS** – although most operators use a selection of high-end receptives such as Bonotel Exclusive Travel and Team America for hotel bookings, they will prefer, when possible, to contract directly.
3. **RELATIONSHIPS** – the success of business in any global market is largely based on personal relationships, especially with luxury operators who place heavy emphasis on detail, added value and personal service.
4. **DIFFERENTIATION** – luxury operators, more so than others, will want to differentiate themselves from their competitors and offer unique experiences, tours, VIP access to attractions, etc.
5. **EXPERIENCES AND AUTHENTICITY** – tour operators need to be provided with ‘money can’t buy’, authentic, ‘wow’ experiences to offer their customers; whether it’s a destination experience or an offer through a hotel, consumers are demanding more culturally immersive, memorable things to do while on vacation.



THE IMPORTANCE OF THE TRAVEL AGENT

Travel agents still play a key role in the luxury travel market. Luxury travel is nearly always tailor made, and complex travel requires the knowledge and expertise of an experienced travel consultant. Luxury travel is very service-oriented and consumers expect the best advice and firsthand knowledge. Accordingly, training and supporting these consultants is key

to driving consumers to your destination. Luxury consultants (as they are more commonly known in many global markets), unlike the typical travel agent, will want a more detailed understanding of a destination or hotel and seek to make their own contacts in order to provide their clients with the most personalized service.

UNITED KINGDOM TOUR OPERATORS



CARRIER

TRAILFINDERS
THE TRAVEL EXPERTS 

Turquoise
The Turquoise Holiday Company

AUDLEY

BLACK TOMATO

Smith
Mr & Mrs Smith
Hotel Collection

EDEN



ScottDunn
ANYTHING ELSE IS JUST A HOLIDAY

Q
QUINTESSENTIALLY
TRAVEL

BaileyRobinson
Travel Without Compromise

&
Abercrombie & Kent

ORIGINAL TRAVEL
Life is in the detail

CANADA TOUR OPERATORS



GLOBUS
Every journey tells a story™

TRUFFLEPIG

HORIZON
unforgettable holidays


Private Trips
for Active Travellers

INSIGHT VACATIONS
The Art of Touring in Style

Butterfield & Robinson
BIKING AND WALKING SINCE 1966

THE CHALLENGES

The size and complexity of planning a California vacation is an obstacle for all market segments, but in the luxury segment the travel trade relies heavily on receptive tour operators and destination marketing companies (DMCs). Visit California understands that the biggest challenge to selling California product is the lack of DMCs in market. Therefore, Visit California will be working with DMOs to refer clients and leads directly to suppliers actively working the luxury market, as well as to activate DMCs.

A second challenge is that many luxury operators want all-inclusive experiences both for their clients and when preparing their itineraries. Many travelers do not expect additional costs to be added to the already pre-planned and pre-booked experiences. This includes sales tax, tips, resort charges and other additions to the bill that create a perception of hidden costs and related lack of convenience.

THE TOOLS

California is full of passionate, experienced providers and the state's customer service is unsurpassed throughout the world. Visit California and the California industry need to further arm the luxury travel trade — the curators of highly personalized experiences for the luxury audience — with destination knowledge. Themed itineraries are key, especially luxury itineraries that highlight unique California experiences through the eyes of local experts and peers. Luxury operators generally do not produce a typical travel brochure. If they distribute printed material it is often as a coffee table book or magazine. Their websites are sleek, contemporary and content rich, with few references to price, if any. They are inspirational (images and blog posts from travel specialists) and allow consumers to browse by destination, month of travel and holiday type. Luxury operator websites do not have booking functions, and instead consumers are encouraged to email an inquiry or call to speak to a specialist who can offer personalized service.



“Experience is the currency of luxury travel. We are constantly in search of new, unique and authentic experiences which offer our clients the chance to embrace the essence of the destinations they visit. These experiences are often combined with a stay in a boutique hotel, a contemporary eco-hideaway or on a desert island in an awe inspiring location. All our partners are hand picked and itineraries tailored by our team of in house experts.

Our aim is to put the romance back into the travel experience and our luxury is about space, privacy, passion and style.”

- James Bell, Managing Director, Turquoise Holidays

CURRENT STRATEGY & PROGRAMMING

Visit California's travel trade strategies for the current fiscal year include:

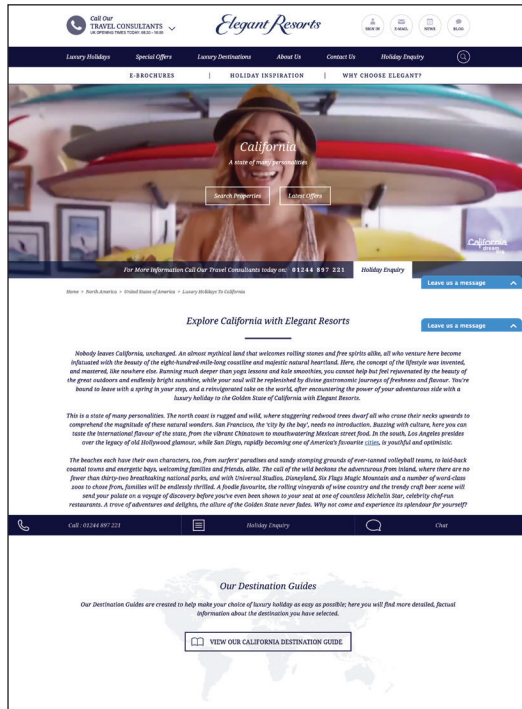
1. Communicating the current California product offering for the luxury audience worldwide, with a focus on the United States, Canada and the United Kingdom.
2. Building deep relationships with those that create and curate highly personalized trips for the luxury audience, with an eye toward encouraging inclusion of the California product.
3. Evaluating existing luxury showcase platforms and conferences with a goal of organizing a Californian iteration next fiscal year.

The first phase of the travel trade luxury program is focused on the United States, United Kingdom, Canada and Middle Eastern markets, with hugely influential networks of luxury operators and travel agent consortiums providing prime target audiences. Visit California has evaluated key luxury tradeshow platforms in addition to developing custom luxury sales missions and targeted operator and agent training platforms, including familiarization visits. The total trade marketing investment for Visit California's Phase I-II luxury trade endeavor is approximately \$1.1 million.



ELEGANT RESORTS

Visit California tested the waters of product expansion with Elegant Resorts, whose objective was to target Elegant Resorts' High Net Worth clients and build awareness of California as a luxury holiday destination. The result was a 48 percent increase in bookings for California, surpassing Florida as Elegant Resorts' top U.S. destination.



TURQUOISE HOLIDAYS

Visit California has supported the launch of a new California-specific program with luxury tour operator Turquoise Holidays, specializing in offering unique, authentic vacation experiences to extraordinary destinations around the world. California was a natural starting place to enter the United States, pairing an abundance of unique experiences with the laid-back luxury lifestyle. Turquoise's investment in proprietary digital content and commitment to seeking out the ultimate product for its customers positions it for growth over the next 24-36 months.



VIRTUOSO

Visit California entered a year-long partnership with Virtuoso, the leading network of luxury travel advisors and entities. This invitation-only organization comprises 355 agencies with more than 8,900 elite travel specialists in 25 countries throughout North America, Latin America and the Caribbean, Asia-Pacific and Europe. Virtuoso travel advisors serve the most affluent, well-traveled individuals in the world and represent the top 1 percent of travel agencies measured by service, offering and revenue from luxury travel sales. Visit California's partnership with Virtuoso provides us with access to world-class consumer marketing channels that effectively target affluent consumers with a high propensity to travel.



ARABIAN TRAVEL MARKET

Visit California attended the 2016 edition of Arabian Travel Market, held April 24-26, marking its second year at this show. Arabian Travel Market sits under both the Market Expansion and Super Affluent strategies, providing an opportunity to reach travelers with high disposable income from the growing Gulf Cooperation Council (GCC) countries. This was the first year that Visit California exhibited with a dedicated California booth, joined by 15 California delegates who leveraged this new co-op platform. In addition to the trade show, Visit California hosted a VIP reception for trade, media and airline partners.

CALIFORNIA LUXURY SHOWCASE

The first in a series of Visit California-produced California Luxury Showcase sales mission-style platforms took place in the United Kingdom in July 2016. It featured networking events as well as numerous product manager and luxury travel advisor trainings in London, Chester and Manchester. The California Luxury Showcase also included a Luxury Travel Symposium, which was held in partnership with Aspire, the luxury publication of Travel Weekly. In addition to the media, key luxury United Kingdom tour operators participated and shared insights on California's positioning in the United Kingdom luxury travel marketplace.

VIRTUOSO'S ANNUAL TRAVEL WEEK

In August 2016 Visit California participated in Virtuoso's Annual Travel Week in Las Vegas, which played host to more than 3,000 travel advisors and 2,000-plus suppliers. Visit California conducted more than 300 appointments with luxury travel advisors from the United States, Canada, Australia and Latin America.



“Canadian luxury travelers seek out luxury travel without pretense. They enjoy the laid-back authentic experiences but still have a base expectation of this including sophistication and personalization. There is a growing demand for multigenerational travel with an expectation that itineraries will incorporate activities for the entire family and allow valuable and memorable family time.

California is known in this market as a high-end wine and golf destination and as such it tops the request list of must-dos.”

Lucy Vieira, Director, Away by TTI Travel

PRIVATE LUXURY FORUM

Visit California was a sponsor at the Private Luxury Forum show held at the Monarch Beach Resort in September 2016. The Forum was attended by 130 of the most influential luxury buyers in the world representing a cross-section of private travel designers, travel consultants, high-end travel agencies, tour operators, lifestyle management and concierge services. Visit California conducted 50 one-on-one meetings, participated in numerous networking events and took advantage of added visibility from the partnership. Visit California is evaluating the platform for potential future trade engagement in key global markets.



ILTM

December 2016 marks Visit California's first showcase at ILTM, the only truly global event for the luxury travel industry. Visit California will be the first U.S. state tourism board to have a presence at ILTM which is attended by 1,500 of the world's most influential luxury travel buyers, 1,500 luxury travel suppliers (sellers) and 170 luxury travel publishers and editors. The Visit California delegation will have the opportunity to build leads and sales prospects through pre-scheduled meetings with these luxury agents and decision makers from around the globe. This carefully curated delegation will feature up to 10 destinations, each joined by a luxury hotel partner from their respective region. Both trade and CEO tracks will be offered. Visit California will make its debut at ILTM's Opening Forum, sponsoring wine, entertainment and an exclusive giveaway.



LUXURY TRAVEL ADVISOR'S ULTRA SUMMIT

Luxury Travel Advisor's ULTRA Summit is an exclusive, invitation-only event that brings together world-class travel agency owners and managers with the most opulent, ultra-luxury suppliers in the industry. Approximately 40 ultra-luxury advisors and 40 suppliers are invited to this U.S.-based show, to be held May 21-23, 2017, in Washington, D.C. (It moves to different U.S. host destinations each year.) Visit California will attend next year's show with standard partner participation with the intent to explore the organization of the show and look for future opportunities.

LUXURY TRAVEL ADVISOR'S
ULTRA
SUMMIT

FUTURE PLANS

Beyond the above-listed activities, Visit California will host a series of luxury operator product development familiarization trips in early 2017, along with a luxury agent incentive trip in spring 2017.

CALIFORNIA STAR

The new California STAR trade engagement program, which focuses on agent education and serves as a sales companion, will include a section on luxury for California, and will continually be expanded with more luxury content to better showcase California's diverse luxury offerings. This luxury content will reach the current database of 25,000 agents globally, as well as new agents being acquired daily.



“California consistently performs well for our luxury clients, and interest has definitely grown this year. We get raving feedback and it’s relatively easy for us to execute a successful trip. Key product interests are self-drives along the coast, between San Francisco and Los Angeles, self-guided hikes, educational travel (looking at universities/colleges for the kids) and getting out of the cities, focusing on places like Big Sur and Santa Barbara. Another vital component is the food; there is a great desire to eat at some of the amazing restaurants California is known for.”

- Victoria Marsh, Luxury Travel Planner, Trufflepig

VIRTUOSO

Visit California will expand its partnership with Virtuoso, increasing the state’s profile as a luxury destination through an increased presence at Virtuoso’s annual Travel Week, participation at the Virtuoso Global Forum, U.S. and international regional events, additional training opportunities targeting Virtuoso’s luxury travel advisors, and continued consumer-direct marketing efforts through Virtuoso’s exclusive network of luxury clientele.

VISIT CALIFORNIA LUXURY BUYERS CONFERENCE

Visit California also plans to organize its own industry-wide conference for luxury buyers and suppliers. PURE Life Experiences at Palais de Congres in Marrakech was attended from September 12–15, 2016, as part of the luxury trade show exploration process to ascertain fit for Visit California and industry partners. It was noted that the show is not for CVBs and is very restricted for what DMOs can do; it is best designed for experiences and hotels/lodges that are unique. The recommendation is for Visit California to participate with an exclusive collection of California properties and experiences at PURE 2017.

There may also be interest from the show organizers to collaborate on a “California Luxury Collection” show in California, as they also manage a dedicated Africa show in South Africa and style-conscious luxury travel show in Miami.

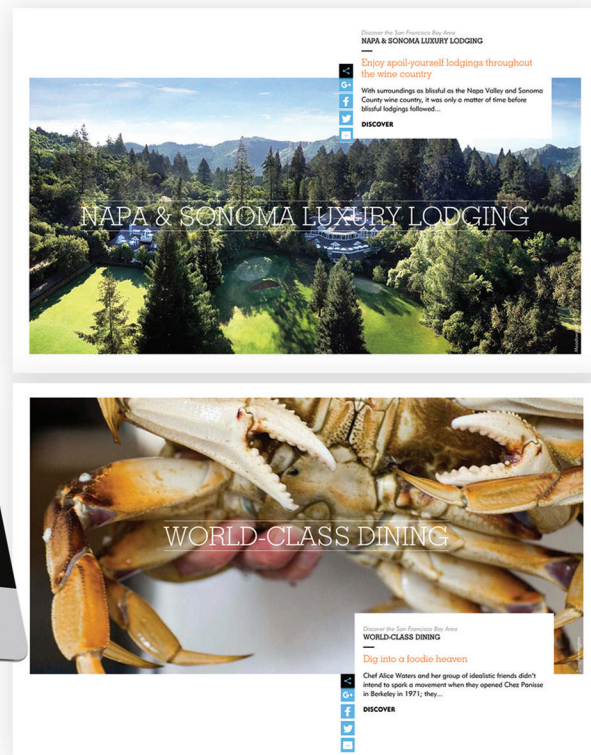
Visit California sees a huge opportunity in organizing a platform for California suppliers of luxury experiences and global buyers. The plan is to work with a company that already has a successful formula for such a forum figured out and to bring this luxury show to California for the next three years.

OWNED MEDIA CHANNELS

Visit California's website (VisitCalifornia.com) is a highly visual, inspiration-filled portal created for travelers considering a trip to the Golden State. It is designed to both create desire for a California vacation and then, at appropriate moments throughout the decision journey, pass the user to California industry websites for deeper, more specific product and booking information. This "lean back" content experience, which

ultimately drives to a "click through" action, is particularly well suited to showcase California's luxury product and experiences.

Given the robust nature of California's product offerings, Visit California has created a two-pronged approach to luxury content on its website.



Visit California's Luxury entry page serves as the inspirational portal highlighting the depth and breadth of California's luxury experiences. The long-scroll functionality of the site helps to immerse the consumer in luxury product offerings.

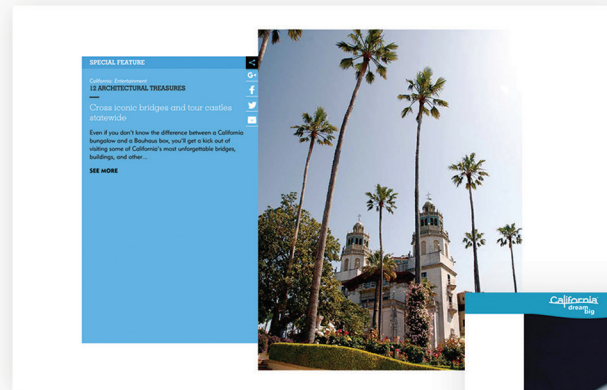
LUXURY DESTINATION

The first is the Luxury destination (VisitCalifornia.com/luxury) that showcases the volume of California luxury experiences across activity segments: Family, Culinary, Entertainment (arts & culture) and Outdoor.

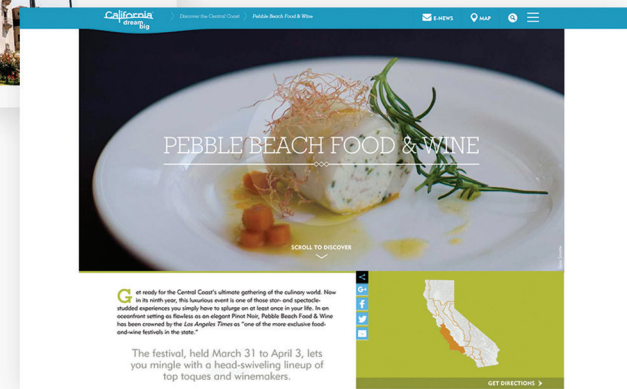
The content showcases all aspects of travel important to the luxury consumer, from dining to accommodations to activities and marquee events.

Every piece of content on the Luxury page is optimized for this audience segment, and the insights, inspiration and imagery were chosen specifically for this discerning traveler.

Information about accommodations is positioned alongside content or within other experiences of interest to high-end consumers.



Key events that appeal to the luxury audience are peppered throughout the Luxury pages.

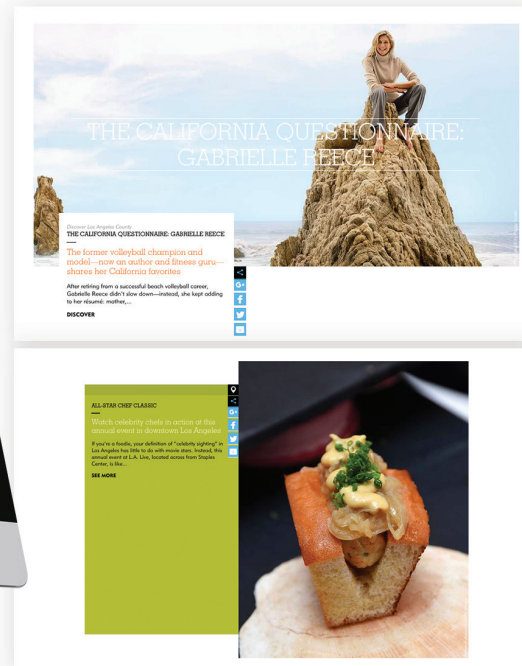


TRANSCENDENT CALIFORNIA EXPERIENCES

The second prong, aligned yet distinct, is the Transcendent California Experiences content that specifically targets the high-end luxury traveler. This bespoke content collection does not showcase the depth and breadth of California’s luxury experiences, but rather a highly curated and specific set of content tailor made for the luxury audience. This small but very sought-after segment actively pursues the ultimate in travel experiences – authenticity is essential and money is no object. The content gathered here reflects this mindset. (This entry page was originally created as a landing page for consumers who engaged with Visit California’s Super Affluent advertising campaign.)

The combination of these two luxury-focused entry pages support the three main objectives of the owned program for the Luxury market:

1. To provide a home for original and curated travel content that speaks directly to the desires and needs of the luxury audience.
2. To provide a platform for the industry to showcase product offerings tailored to the luxury market, with direct links to these experiences and destinations.
3. To support paid media campaigns by providing a “handoff” page that allows consumers to explore related content on Visit California’s owned channels.



PROVIDE A HOME

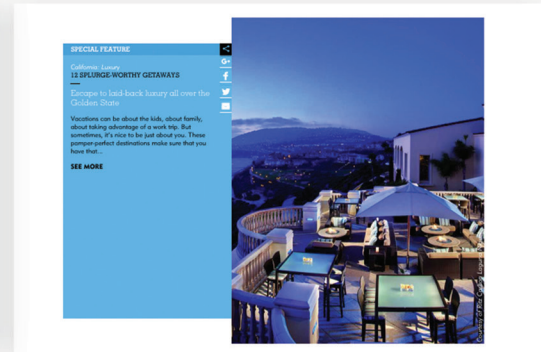
In keeping with Visit California's content goal of uncovering and showcasing extraordinary experiences that drive consumers to industry for planning and purchase, Visit California's luxury-focused pages make up the content repository for owned efforts. Knowing this traveler is accustomed to a certain level of service and customized offerings, Visit California utilized its rigorous editorial process to:

1. Identify appropriate luxury experiences.
2. Spotlight these experiences through compelling prose.
3. Incorporate arresting imagery with the goal of showcasing the best of the California luxury product.

This highly targeted collection of content also features content gathered from paid initiatives, including insights from luxury ambassadors such as Tyler Florence, Gabrielle Reece and Annie Lawless — Californians who embody the luxury lifestyle.



VisitCalifornia.com's Luxury pages introduce and direct consumers to desirable experiences, such as spas and wellness escapes.



Content created for paid campaigns is leveraged across Visit California's owned channels to humanize and authenticate California's luxury offerings.

As research has shown, luxury travelers are looking for unique and exclusive itineraries. Included on the luxury pages are highly detailed, over-the-top itineraries originally crafted for the International Luxury Travel Market conference and designed with this audience in mind. Itineraries like these, as well as the foundational content created for the Luxury pages, are available for travel trade partners to use as they package and showcase California's high-end and exclusive product.

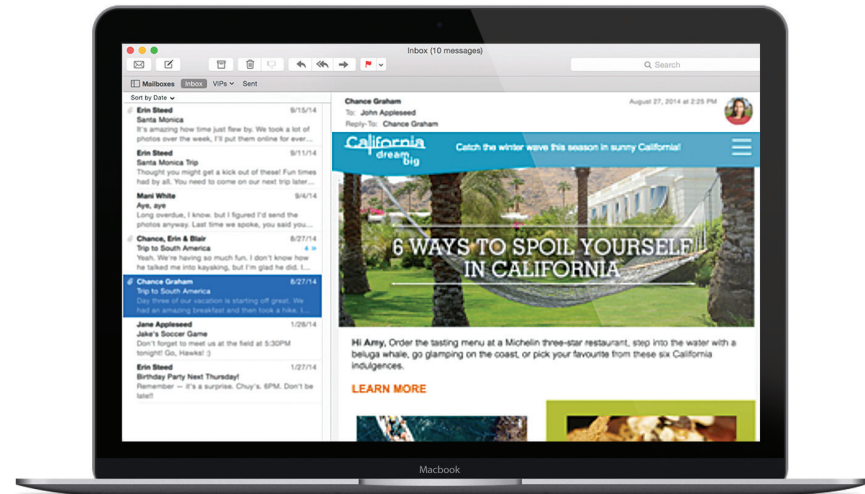
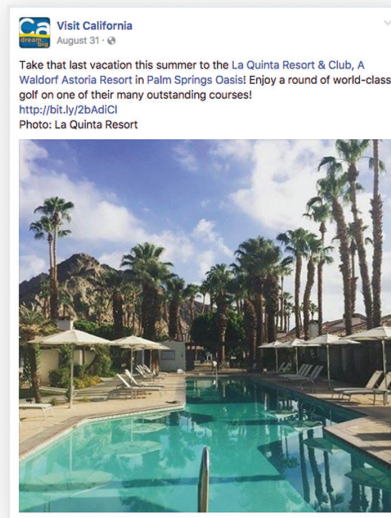
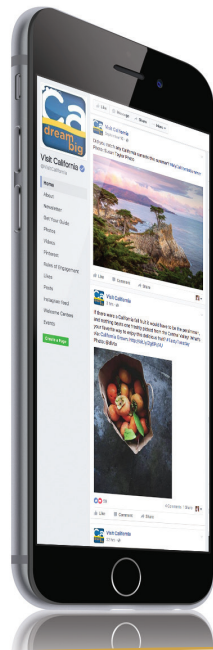
Visit California also works closely with the trade to showcase some of their product offerings through Visit California's other distribution channels, like social media. In aggregate, Visit California's social media program has nearly two million fans and followers who engage with California content on a regular basis. Visit California leverages these channels to promote trade content and offerings in addition to the regular promotion of luxury content through these channels.

Visit California also uses social media to highlight content on the Luxury pages. In the social space, Visit California identifies and targets the luxury audience within its existing social media audience base, connecting with these users through Facebook, Twitter and Instagram and then driving them to the Luxury page for a more immersive content experience.

Visit California also utilizes global social channels to highlight partner content.

California's compelling luxury message is also distributed via domestic and international e-newsletters; the annual California Visitor's Guide; a one-million circulation Road Trips publication; and a suite of 13 International Visitor's Guides.

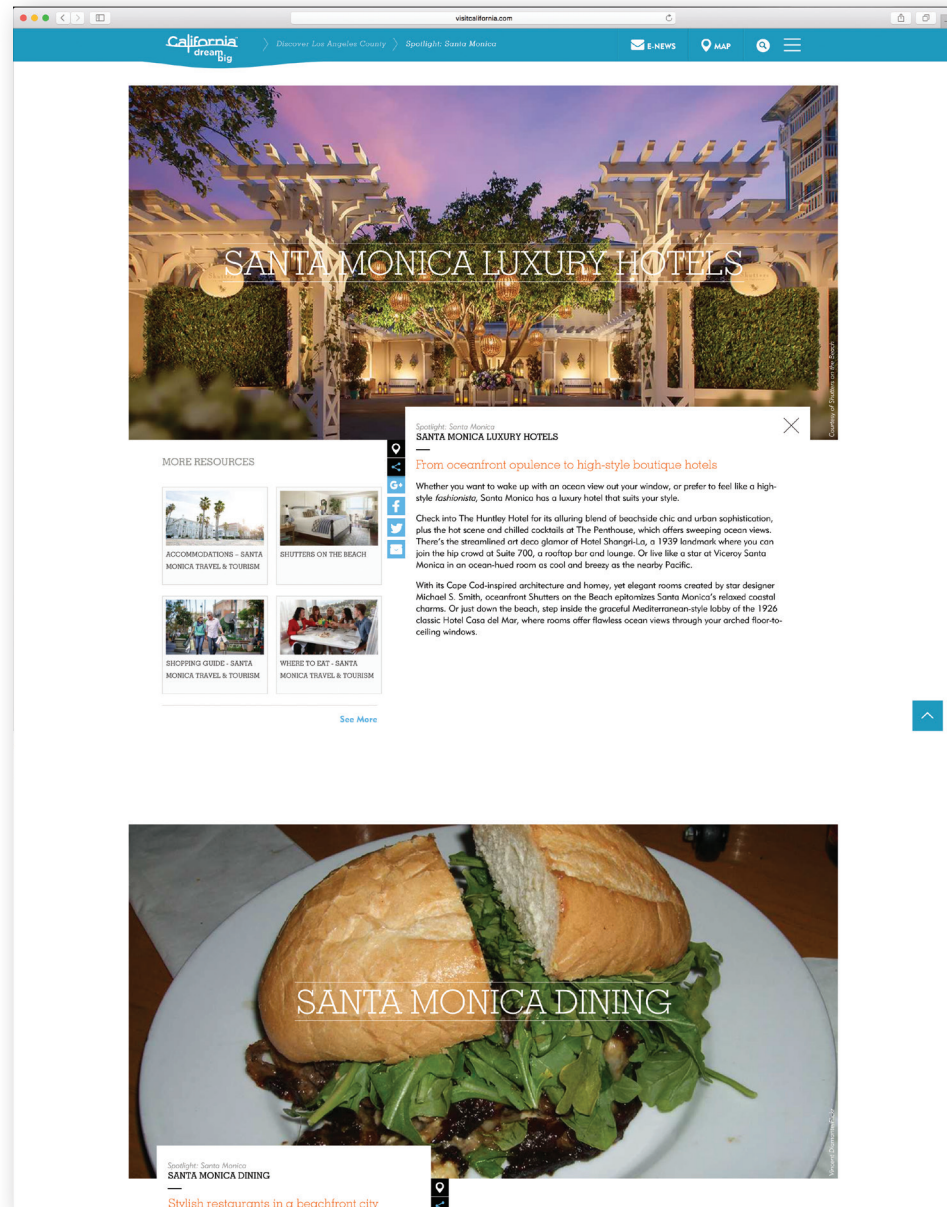
The e-newsletter program allows Visit California to target luxury audiences through their email inbox, luring them to engage with luxury content and guiding them further down the path to booking a trip.



PROVIDE A PLATFORM

As with all content on VisitCalifornia.com, the ultimate goal of Visit California’s luxury content is to assist consumers in finding the best location for them to plan, and ultimately book, their journey. This is done through the highly curated set of partner links featured alongside all content on the website.

Through these two luxury pages—standard and transcendent—Visit California is able to provide more than 200 links to California industry partners. These pages collectively draw 20,000+ consumers per month who click out of the VisitCalifornia.com environment and into industry websites.



PAID MEDIA SUPPORT

Audiences seeking additional information after engaging with Time Inc. and/or Condé Nast's sponsored/native content are encouraged to 1) click straight to the high-end experience featured in the editorial or 2) visit the Transcendent Luxury Experiences page for additional insights and more detailed content. If the consumer chooses the latter, he or she will be transported to a content experience that echoes and reinforces the messaging within the paid campaigns.

As Visit California continues to market to the luxury audience, the owned channel team will continue to refine and reorient the editorial content, with the goal of providing consumers with a fresh, highly relevant experience.



EARNED MEDIA CHANNELS

Earned media is critical to Visit California’s success in communicating California’s luxury brand and product offerings to High Net Worth Individuals. Editorial content is the driving force of third-party media channels and provides the curated voice and trusted “seal of approval” luxury consumers seek when deciding where to go and what to buy. Earned media coverage drives the narrative and shapes the message through content produced by non-commercial editorial staff. Globally, earned media is a staple of Visit California’s marketing program and the resulting editorial content is further reinforced by Visit California’s sponsored and owned content. Earned media also plays a central role in reaching the consumer in Tier 2 and Tier 3 markets in which Visit California is not investing in paid advertising. While more difficult to achieve and control, the payoff of earned media coverage is incredibly influential and valuable as it serves to simultaneously inspire and inform.

Visit California’s global public relations team acts as an extension of the editorial teams at target media channels and establishes Visit California as a reliable resource by feeding a steady stream of relevant news and customized pitches; creating and producing exclusive content development experiences (for articles and photography, in particular); and supporting editorial photo shoots on location in California.

Just as the luxury consumer demands customized experiences, luxury media require a nuanced, custom approach. These outlets have extraordinarily defined and refined tastes; do not want to tell the same stories as one another; and are not as receptive to mass-approach public relations tactics, such as press releases and group press trips. Therefore, relationships and highly targeted tactics like exclusive events and celebrity integration will be key to making inroads to shape and generate luxury-centric editorial features.



MEDIA TARGETS

As mentioned under the Sponsored/Native Content section, the Super Affluent audience regularly consumes heritage print titles and has proven confidence in these media brands. These titles have maintained their position as authorities in luxury travel and have been relatively unscathed by the challenges other print titles faced as the “traditional” media ecosystem further dissolves into digital. Luxury publications differentiate themselves from mainstream media not only by publishing exclusive editorial content with a distinctive voice and introducing what’s new and culturally relevant to the marketplace, but also by incorporating the latest trends in design — reflected in the visual approach of both their print and digital platforms. There is a finite number of feature-length opportunities within these titles over a calendar year, given they spread the wealth around the globe and plan far in advance. These long-lead features can take years to develop, so placing equal if not greater emphasis on digital media, influencers and brand collaborations rounds out the earned media strategy with opportunities that can yield results within a short-lead timeframe.

Engagement with influencers and celebrity ambassadors will help reinforce California’s position as a leading luxury destination, as will working with the new collection of “coffee table–style” journals and niche luxury lifestyle publications that have emerged over the past few years — all prime channels to disseminate the luxury message through editorial that can be directly shaped by Visit California’s pitching and hosting activities.

“Luxury bloggers” have become a media category in their own right. Many Instagram influencers, such as Nicole Warne, Natasha Oakley and Aimee Song, have carved out celebrity status and the millennial generation considers them to be the new voice of luxury. They have become some of the most influential marketers around and are viewed in much the same way fashion magazine editors, wine critics and society figures had been in the past. Fans want to hear advice from these tastemakers, see unique and authentic storytelling and follow their insider’s view of culture, entertainment, fashion and luxury living. Influencer outreach, using them to amplify content and how to navigate authentic versus sponsored/native content, is one of the most discussed topics in travel.

Because “experience is the new status symbol,” there is an increasing desire from the Millennial generation to seek out experiences that demonstrate that they’ve “made it.” This “inclusive exclusivity” effect has led to the emergence of new outlets that specifically target the affluent Millennial, such as Amuse, i-D and Vice’s new lifestyle title which publishes travel content with a luxury focus.

Notably, traditional luxury media are also targeting a younger demographic of affluent readers, hoping to shape the next generation’s views on the best brands and experiences. The marquee travel media brands are sources of aspirational content whether or not the reader is in the target demographic, creating a halo effect for destination brand awareness beyond the Super Affluent, which also allows this targeted strategy to seamlessly bolster the entire earned media program.

EARNED MEDIA STRATEGY

Visit California has defined the following guideposts and filters to focus earned media activity:

- **DEFINING TRENDS:** Always looking to stay ahead of the trend curve, whether it's cutting-edge architecture, style, wellness or cuisine.
- **EXCLUSIVITY:** Destinations and activities that are off the beaten path and/or in high demand.
- **ASPIRATIONAL IMAGERY:** Luxury publications capitalize on striking images of destinations and people, most often produced as original content from press trips or Style-Led: From the latest collections of high-end and emerging designers to jewelry and accessories, fashion and style naturally fit with travel and destinations, presenting opportunities for brand collaborations.
- **SOCIAL MEDIA:** Eponymous social media channels promote original content and luxury brands pay a premium to be featured on tastemakers' social media feeds; destinations can provide an experience in exchange for influencer coverage.
- **LANGUAGE:** Sophisticated storytelling.



Pitches and features including but not limited to A-list accommodations provide opportunities to showcase shopping; exclusive and indulgent experiences; and California food and wine. California's abundance of luxury offerings can be further elevated by illuminating surprising or lesser-known experiences across a spectrum of tourism industry categories. Media outreach aimed at the luxury consumer will amplify unique aspects of craftsmanship, creativity, environment and design expertise that are uniquely Californian and will frame laid-back luxury experiences in a way that implies intrinsic value (e.g. health, wellness, self-discovery and personal growth).

PRELIMINARY PROGRESS

To date, Visit California's earned media programming has generated editorial content with placements in print, broadcast and digital channels across all markets. These earned media programs have an even greater impact in markets with smaller but equally high-value audiences not supported by the level of integrated paid campaign activities running in the United States, Canada and the United Kingdom. As detailed below, outreach in Germany, Brazil, Japan, France, Mexico and Australia has already proven fruitful in spreading California's laid-back luxury message to consumers in these countries, with continued coverage expected.

EARNED MEDIA HIGHLIGHTS

In partnership with Ferrari, Visit California invited 16 international journalists and domestic influencers to test-drive the Ferrari “California T” sports car along the iconic Pacific Coast Highway. These influencers had a combined total of more than 1.4 million followers on Instagram and the international media represented key outlets such as *GQ Australia*, *Cosmopolitan Germany*, *The Rake Japan* and *Condé Nast Traveler*. To date, the influencers shared 39 posts, reaching more than six million consumers and generating 200,000 likes. The experience was featured in the July issue of *Condé Nast Traveler* and the August issues of *Cosmopolitan Germany* and *The RAKE Japan*.



Visit California Canada hosted a group press tour in December 2015 featuring Southern California luxury experiences in San Diego, Laguna Beach, West Hollywood and Beverly Hills. The four participating media were on assignment for *Montecristo Magazine*, *Travel Industry Today*, *Western Living*, *BC Living*, *National Post* and *Dreamscapes Magazine*.

Visit California Mexico hosted a press tour for *Travesías Magazine* that featured lifestyle experiences in Monterey, Carmel and Santa Barbara.

MONTECRISTO

BCLiving

NATIONAL POST

DREAMSCAPES
TRAVEL AND LIFESTYLE MAGAZINE

Travel
Industry
TODAY

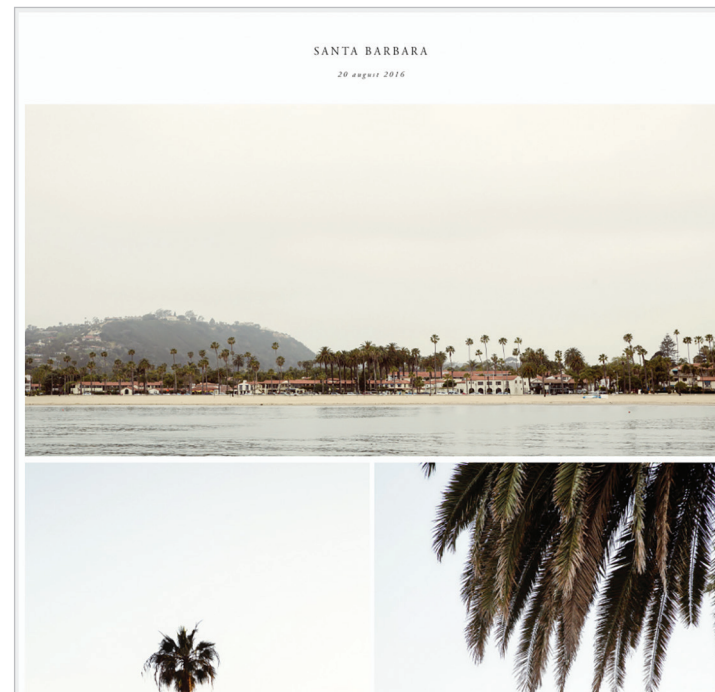
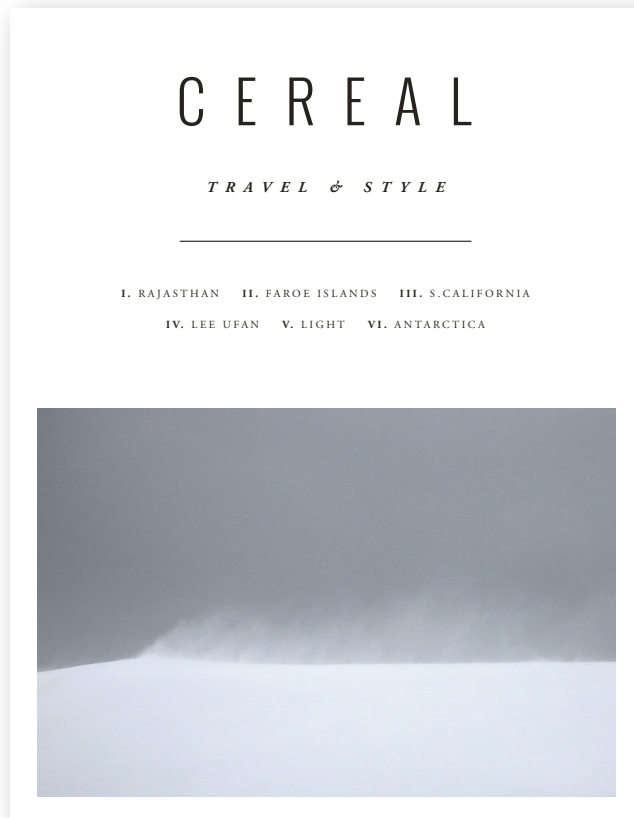
westernliving
magazine

Travesías



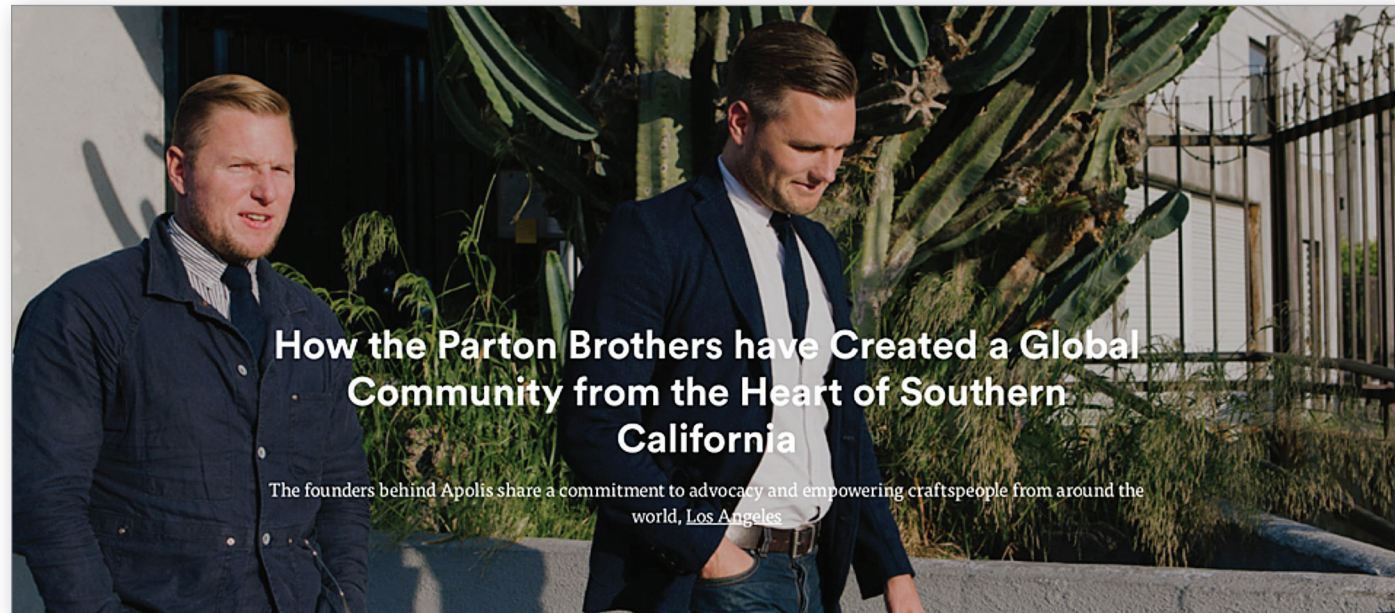
In June 2016, Visit California U.K. co-hosted a high-end group media trip with Air New Zealand. The group experienced both premium economy and business class cabins and reviewed new luxury hotels in Laguna Beach and Huntington Beach, before traveling to Santa Barbara and Solvang for a helicopter tour and wine tasting. Media guests attended from *Harper's Bazaar*, *Town & Country*, *Mail on Sunday*, *Refinery 29*, *Evening Standard* and *Gallucks*.

The September 2016 edition of the luxury travel journal *Cereal* showcased 32 pages of Southern California editorial content spotlighting Ojai, Santa Barbara, Los Angeles and greater Palm Springs. The copy and photography are a stunning interpretation of California and the social content that accompanied the trip resulted in 65 Instagram posts and website features with a reach in excess of 10 million.

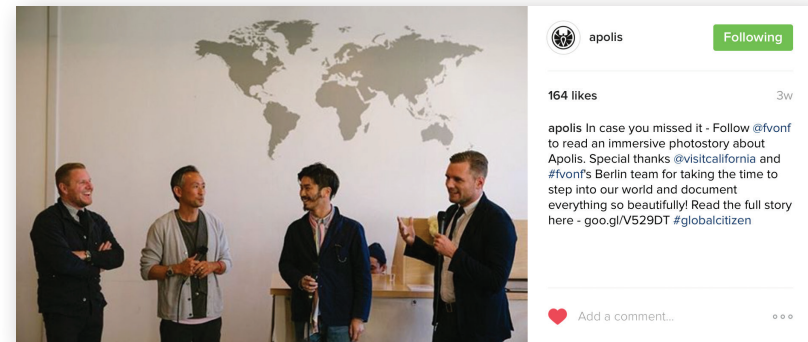
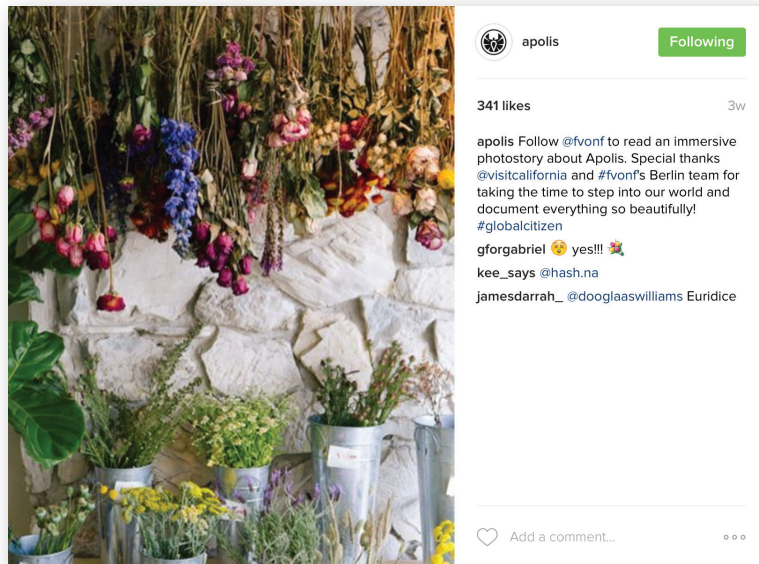
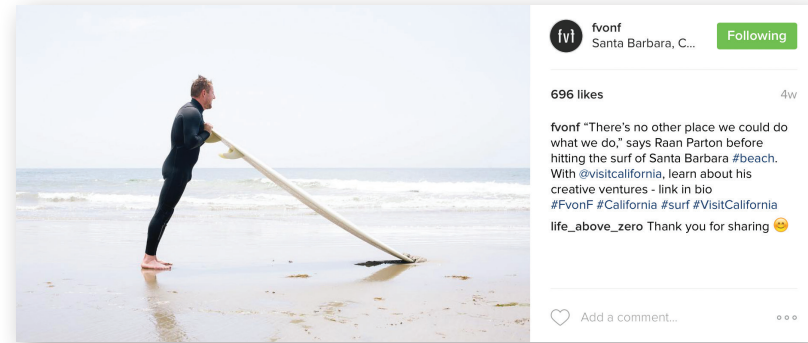


Visit California Japan worked with *Soradia Premium*, a publication serving a high-income audience interested in luxury travel, to generate an August 2016 feature covering wineries and luxury hotels in Santa Barbara and Los Angeles. The magazine's 130,000 circulation generated the equivalent of \$270,000 in paid advertising.

Visit California partnered with global media platform Freunde von Freunden ("Friends of Friends") to produce three personality-driven content features as part of a multi-platform editorial collaboration celebrating creatives living out their dreams in California. One of the features showcased Southern California through the lens of the entrepreneurial Parton brothers, the minds behind Apolis Global and Alchemy Works (among other retail, arts and real estate projects).

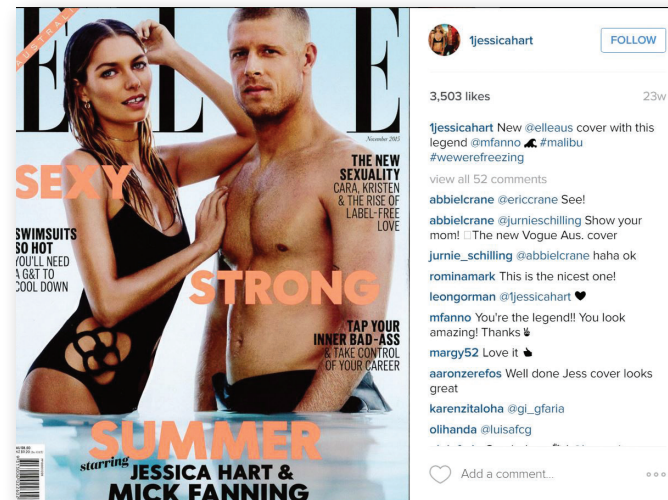


FvF has a global audience made up of the creative class, including tastemakers and opinion leaders in the fields of culture, cuisine, design and travel. In addition to FvF's online magazine and social media channels, they seed their content with third-party brands and media partners. To date, the content produced for the three stories has reached more than 14 million consumers.



Visit California Australia initiated a PR-driven, multi-platform, dual-country partnership with Witchery, one of Australia and New Zealand’s largest retail fashion brands. The integrated consumer campaign, “The Dream California Summer Road Trip,” promoted the Witchery High Summer 2015 fashion range in tandem with the quintessential Southern California road trip. The program included a fashion shoot; an online editorial destination guide promoting a Los Angeles to San Diego to Palm Springs road trip; a consumer promotion to mirror destination content with a database acquisition via entry opt in; and an online training program incentive. Total reach across retail, digital and social was 13.5 million plus digital, social and foot traffic in 192 stores in Australia and New Zealand throughout the month of November.

ELLE Magazine Australia spent two days shooting in Orange County, resulting in a four-page destination guide featuring one of Australia’s top models, Jessica Hart. The guide was promoted to *ELLE*’s EDM database and the magazine and online coverage reached an audience of 310,000. Also on the fashion front, to leverage the Australian Fashion Showcase during Los Angeles Fashion Week, Visit California staged a group press tour in partnership with Qantas Airlines. Nine top-tier media participated based on their capability to provide coverage in traditional media outlets as well as within the social space, sharing some of Southern California’s most Instagrammed locations by fashion bloggers and influencers in West Hollywood, Pasadena, Los Angeles and Beverly Hills.



Visit California France partnered with *Voyageur du Monde* and Printemps department store to increase awareness and product development through a coordinated consumer, digital, trade and media co-op that coincided with the store's 150th anniversary celebrations. This co-op encompassed product development, brand pillar alignment and social influencer engagement — all focused on the luxury consumer. The France office also partnered with *Le Fooding*, a French print culinary guide, website and social media partner, that reached super affluent consumers interested in sophisticated culinary experiences. The partnership included a culinary map as part of the print magazine, as well as dedicated hashtags on key media accounts and the opportunity to participate in *Le Fooding's* awards in November 2016.

In Brazil, Visit California sponsored a VIP premiere event for the film “California” that included a wine reception for 438 VIP guests and generated more than \$150,000 in media exposure. Visit California designated the film's director, Marina Person, a California ambassador and pitched her California luxury travel recommendations to Viagem & Turismo, Top Destinos and Folha de S. Paulo. Additionally, a web series was produced based on a casting trip to California, which was featured on the *Glamurama* website.



FUTURE EARNED MEDIA ACTIVITIES

Looking ahead, individual press trips, as well as influencer and brand collaborations, will likely continue to yield results. Relationships with luxury editors and influencers will be further cultivated through invite-only events.

Programs in progress and in planning include:

- Visit California will partner with Preferred Hotel Group to produce and host a luxury-focused international group press trip in fall 2016. Participating media will primarily be on assignment for traditional media outlets that also have a strong digital presence. Markets represented include the U.K., France and Germany, furthering Visit California’s luxury reach in these countries.
- The U.K. office will be working on a partnership with fashion designer and influencer Millie Mackintosh around the launch of her clothing line, as well as women’s fashion brand Karen Millen and Three Graces London (stocked in Net-a-Porter, Fortnum & Mason and Selfridges).
- Seven Japanese digital influencers focused on luxury lifestyle and travel will experience San Francisco, Sonoma County and Berkeley.
- The Canadian office will host an influencer couple in order to generate romance-themed content.
- Visit California is partnering with Four Seasons Hotels & Resorts to pitch U.S. media on “hidden luxury” experiences and offer select media individual media visits to the Golden State.
- The show “It’s How You Get There” will air on the History Channel and showcase Northern California road trips via Teslas and Ducatis — certain to resonate with affluent, adventurous travelers.

Pitches will include such topics as:

- Palm Springs Modernism Week, LA Fashion Week, Film Festivals
- Luxury Ski Experiences: heli-skiing, 5-star lodging/lakefront chalets and private chefs
- The Good Life: exploring California’s coastline by yacht
- Architectural Stays in California

For additional images of generated coverage:

<http://luxurystatus.visitcalifornia.com/earned-media-coverage-gallery>



APPENDIX



Time Inc. & YouGov,
“The Survey of Affluence and Wealth: 2015”

Time Inc. and YouGov “The Survey of Affluence and Wealth” provides an in-depth profile of the world’s most elite consumers, gleaned insight from 6,141 affluent respondents in 14 countries (2,958 in the U.S.).

The report includes analysis of affluent and wealthy individuals’ discretionary spending priorities and trends, personal values and evolving brand relationships. Insights include global observations with regard to this elite group.

<https://today.yougov.com/news/2015/04/27/findings-10th-annual-time-inc-yougov-survey-affluen/>



Beverly Hills Conference and Visitors Bureau,
“The Future of Luxury”

Beverly Hills Conference and Visitors Bureau (BHCVB) created a 2016 global report, entitled “The Future of Luxury,” co-authored by trend forecast agency, IN(K). The report examines the current landscape of the global luxury sector, offering an in-depth analysis of the high-net-worth market, and forecasting the newest luxury trends.

By examining the macro-economic landscape, the report identifies the top 10 cities by their population of ultra-high net worth individuals (UHNWIs), analyzes their different demographics and spending patterns, and compares this to Beverly Hills. “The Future of Luxury” report looks at who is consuming luxury goods and services, and examines the different spending habits across multiple generations, in particular the increasingly influential millennials.

<http://lovebeverlyhills.com/press-releases/view/beverly-hills-introduces-the-future-of-luxury>

the *Confident Connoisseur*

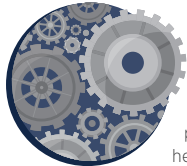
GLOBAL SUPER AFFLUENT PERSONA

WHAT MATTERS?



I live life to the fullest.

The Confident Connoisseur has earned the right to splurge, and will do so as long as the experience is authentic, fulfilling and worthwhile.



I'm at the top of my game.

Years of experience make them influencers and great sources of advice and insight across all their passions, from wine and food, to travel, health and parenting.



I'm sharing, not bragging.

Collected experiences and wisdom are sources of pride. The Confident Connoisseur's genuine interest in sharing with others is what motivates advice.

WHAT MOTIVATES?



I'm wallet-savvy.

The Confident Connoisseur expects quality and convenience, but taking advantage of a great value is also considered a win.



I'm in pursuit of what's next.

Truly unique experiences are researched, daydreamed and discussed. The potential for the next wonderful meal, trip or adventure is a source of endless curiosity and seeking.



I seek luxury without pretense.

Not interested in the latest fad or empty experiences, the Confident Connoisseur has developed a taste for comfort, craftsmanship and personalization, and will pay a premium for it.

International Super Affluent Traveler: Key Nuances

These travelers are more likely to brag via social networks—aware that their U.S. vacation reflects their style (U.K., China and Brazil) and status (Canada and Brazil).

International Super Affluent Traveler: Key Nuances

- International travelers are relatively less wallet-savvy. Travelers from China, Brazil, Australia, Canada and the U.K. indicate that they are willing to pay for quality. While travelers from Mexico do not indicate that they are willing to pay for quality, they do state that they buy based on quality and not price. Travelers from China and the U.K. also share a preference for buying based on quality and not price.
- Despite an overall preference for quality, Canadian and Australian travelers enjoy discounts and deals.

CONTENT CONSIDERATIONS

Sense of discovery is important to the Confident Connoisseur. They respond well to content that resonates and pulls them—from visual stimuli and native advertising, to tools that help uncover “what’s next” and messaging from approachable, peer-like influencers.



THE Cultured Cosmopolitan | GLOBAL CULTURE PERSONA

WHAT MATTERS?



I enjoy the finer side of life.

The Cultured Cosmopolitan enjoys the finer things—from food, to home, to travel—and seeks out experiences that will provide learning, cultural insights and unique discoveries.



I want things on my terms.

Quality and convenience drive purchase decisions, and immediate satisfaction is paramount. The Cultured Cosmopolitan is willing to pay more for the products, brands and services that meet these high expectations.



I'm not slowing down.

The Cultured Cosmopolitan is active all the time, and maintains a health-conscious lifestyle to keep up with this on-the-go pace.

International Culture Traveler: Key Nuances

- While the majority enjoy the finer side of life, they are careful about the financial impact.
- Travelers from the U.K. and China are willing to pay more for quality. Nearly all (excluding China) are careful with money, and most (excluding China and Mexico) enjoy discounts and deals.

WHAT MOTIVATES?



I seek to broaden my mind.

The Cultured Cosmopolitan continuously strives to be worldlier, keeping updated on world events and news, traveling the globe, and learning about foreign cultures and traditions. While not likely to be an influencer, they surround themselves with influencers to learn new things, be motivated and challenge themselves intellectually.



I'm free and confident.

The Cultured Cosmopolitan is optimistic about the future and their finances, and wants to enjoy the status they've achieved. Opportunities to travel are seized, and books, movies and concert performances add to the pleasure of daily life.



I'm active and involved.

The Cultured Cosmopolitan is the activity director for the family. They also fuel their intellectual interests by staying active in politics, the local community, environmental causes and fundraising.

International Culture Traveler: Key Nuances

Most are less likely to be driven by image. Travelers from China, however, place importance on material possessions and celebrity.

CONTENT CONSIDERATIONS

The Cultured Cosmopolitan likes to get more detail and understanding from content—whether in the form of unique stories behind people and places, deeper insights into the local culture, or native advertising unearthing a historical insight. Varied interests also allow for cross-pillar activity.



CALIFORNIA LUXURY OFFERINGS, UNITED KINGDOM - JULY 2016 PRODUCT ANALYSIS

| UK TOUR OPERATOR | DESTINATION | LUXURY HOTEL | URL |
|--------------------|--------------------------------------|---|---|
| ELEGANT RESORTS | San Francisco | The St. Regis San Francisco | http://www.elegantresorts.co.uk/the-st-regis-san-francisco/p |
| | Carmel | Carmel Valley Ranch | http://www.elegantresorts.co.uk/carmel-valley-ranch/p |
| | Beverly Hills | Beverly Wilshire, A Four Seasons Hotel | http://www.elegantresorts.co.uk/beverly-wilshire-a-four-seasons-hotel/p |
| | Lake Tahoe | The Ritz-Carlton | http://www.elegantresorts.co.uk/the-ritz-carlton-lake-tahoe/p |
| | Half Moon Bay | The Ritz-Carlton | http://www.elegantresorts.co.uk/the-ritz-carlton-half-moon-bay/p |
| | Santa Barbara | The Biltmore, A Four Seasons Hotel | http://www.elegantresorts.co.uk/four-seasons-resort-the-biltmore-santa-barbara/p |
| | Beverly Hills | SLS Hotel at Beverly Hills | http://www.elegantresorts.co.uk/sls-hotel-at-beverly-hills/p |
| | Marina Del Rey | The Ritz-Carlton | http://www.elegantresorts.co.uk/the-ritz-carlton-marina-del-rey/p |
| | San Diego | Rancho Valencia Resort and Spa | http://www.elegantresorts.co.uk/rancho-valencia-resort-and-spa/p |
| | San Diego | The Grand Del Mar | http://www.elegantresorts.co.uk/fairmont-grand-del-mar/p |
| | Orange County | The Resort at Pelican Hill | http://www.elegantresorts.co.uk/the-resort-at-pelican-hill/p |
| | Santa Monica | Shutters on the Beach | http://www.elegantresorts.co.uk/shutters-on-the-beach-santa-monica/p |
| | Dana Point | The Ritz-Carlton, Laguna Niguel | http://www.elegantresorts.co.uk/the-ritz-carlton-laguna-niguel/p |
| | Big Sur | Post Ranch Inn | http://www.elegantresorts.co.uk/post-ranch-inn/p |
| | Santa Monica | Viceroy Santa Monica | http://www.elegantresorts.co.uk/viceroy-santa-monica/p |
| | Santa Barbara | Belmond El Encanto | http://www.elegantresorts.co.uk/belmond-el-encanto/p |
| | San Francisco | Four Seasons Hotel San Francisco | http://www.elegantresorts.co.uk/four-seasons-hotel-san-francisco/p |
| Los Angeles | Hotel Bel-Air, Dorchester Collection | http://www.elegantresorts.co.uk/hotel-bel-air/p | |
| ABERCROMBIE & KENT | Santa Barbara | Belmond El Encanto | http://www.abercrombiekent.co.uk/usa/california/belmond-el-encanto.cfm |
| | Beverly Hills | Beverly Hills Hotel | http://www.abercrombiekent.co.uk/usa/california/beverlyhillshotel.cfm |
| | Beverly Hills | Beverly Wilshire, A Four Seasons Hotel | http://www.abercrombiekent.co.uk/usa/california/beverly-wilshire.cfm |
| | Napa Valley | Calistoga Ranch | http://www.abercrombiekent.co.uk/usa/california/calistoga.cfm |
| | Carmel | Carmel Valley Ranch | http://www.abercrombiekent.co.uk/usa/california/carmel-valley-ranch.cfm |
| | San Francisco | Cavallo Point | http://www.abercrombiekent.co.uk/usa/california/cavallopoint.cfm |
| | San Luis Obispo | Dolphin Bay Resort & Spa | http://www.abercrombiekent.co.uk/usa/california/dolphin-bay-resort-and-spa.cfm |
| | San Francisco | Four Seasons Hotel San Francisco | http://www.abercrombiekent.co.uk/usa/california/four-seasons.cfm |
| | San Diego | Hotel del Coronado | http://www.abercrombiekent.co.uk/usa/california/hotel-del-coronado.cfm |

APPENDIX - UK TRADE LUXURY PRODUCT ANALYSIS

| UK TOUR OPERATOR | DESTINATION | LUXURY HOTEL | URL |
|--------------------|---------------|--|---|
| ABERCROMBIE & KENT | Santa Monica | Loews Santa Monica Beach Hotel | http://www.abercrombiekent.co.uk/usa/california/loews-santa-monica-beach-hotel.cfm |
| | Laguna Beach | Montage Laguna Beach | http://www.abercrombiekent.co.uk/usa/california/montage.cfm |
| | Santa Monica | Shutters on the Beach | http://www.abercrombiekent.co.uk/usa/california/shuttersbeach.cfm |
| | Beverly Hills | SLS Hotel at Beverly Hills | http://www.abercrombiekent.co.uk/usa/california/sls-beverly-hills.cfm |
| | San Francisco | The St. Regis San Francisco | http://www.abercrombiekent.co.uk/usa/california/st-regis-san-francisco.cfm |
| | Napa | The Carneros Inn | http://www.abercrombiekent.co.uk/usa/california/carneros-inn.cfm |
| | San Francisco | The Fairmont San Francisco | http://www.abercrombiekent.co.uk/usa/california/fairmont.cfm |
| | Lake Tahoe | The Ritz-Carlton | http://www.abercrombiekent.co.uk/usa/california/the-ritz-carlton.cfm |
| | Santa Monica | Oceana Beach Club Hotel | http://www.abercrombiekent.co.uk/usa/california/oceana-beach-club-hotel.cfm |
| | San Francisco | The Ritz-Carlton | http://www.abercrombiekent.co.uk/usa/california/san-francisco.cfm |
| | San Diego | The US GRANT - A Luxury Collection Hotel | http://www.abercrombiekent.co.uk/usa/california/us-grant.cfm |
| | Santa Monica | Viceroy Santa Monica | http://www.abercrombiekent.co.uk/usa/california/viceroy-santa-monica.cfm |
| | Big Sur | Ventana Inn & Spa | http://www.abercrombiekent.co.uk/usa/california/ventana-inn.cfm |
| | Santa Barbara | The Biltmore, A Four Seasons Hotel | http://www.abercrombiekent.co.uk/usa/california/four-seasons-resort-the-biltmore-santa-barbara.cfm |
| LUSSO TRAVEL | Calistoga | Calistoga Ranch | https://www.lussotravel.com/hotels/calistoga-ranch/ |
| | San Francisco | The St. Regis San Francisco | https://www.lussotravel.com/hotels/the-st-regis-san-francisco/ |
| | San Francisco | The Fairmont San Francisco | https://www.lussotravel.com/hotels/fairmont-san-francisco/ |
| | Carmel | Carmel Valley Ranch | https://www.lussotravel.com/hotels/carmel-valley-ranch/ |
| | Big Sur | Post Ranch Inn | https://www.lussotravel.com/hotels/post-ranch-inn/ |
| | Santa Barbara | Belmond El Encanto | https://www.lussotravel.com/hotels/belmond-el-encanto/ |
| | Santa Barbara | The Biltmore, A Four Seasons Hotel | https://www.lussotravel.com/hotels/four-seasons-resort-the-biltmore/ |
| | Santa Monica | Viceroy Santa Monica | https://www.lussotravel.com/hotels/viceroy-santa-monica/ |
| | Santa Monica | Shutters on the Beach | https://www.lussotravel.com/hotels/shutters-on-the-beach/ |
| | Beverly Hills | Beverly Wilshire, A Four Seasons Hotel | https://www.lussotravel.com/hotels/beverly-wilshire-a-four-seasons-hotel/ |
| | Orange County | The Resort at Pelican Hill | https://www.lussotravel.com/hotels/the-resort-at-pelican-hill/ |

APPENDIX - UK TRADE LUXURY PRODUCT ANALYSIS

| UK TOUR OPERATOR | DESTINATION | LUXURY HOTEL | URL |
|-------------------------------|---------------------|---|---|
| NORTH AMERICAN TRAVEL SERVICE | San Diego | Rancho Valencia Resort and Spa | https://www.lussotravel.com/hotels/rancho-valencia-resort-spa/ |
| | San Diego | The US GRANT - A Luxury Collection Hotel | https://www.lussotravel.com/hotels/the-us-grant-a-luxury-collection-hotel-san-diego/ |
| | San Diego | Hotel del Coronado | https://www.lussotravel.com/hotels/hotel-del-coronado/ |
| | San Luis Obispo | Dolphin Bay Resort & Spa | https://www.lussotravel.com/hotels/dolphin-bay-resort-spa/ |
| | San Francisco | The Ritz-Carlton, San Francisco | http://northamericatravelservice.co.uk/usa/california/san-francisco/the-ritz-carlton-san-francisco/ |
| | San Francisco | The St. Regis San Francisco | http://northamericatravelservice.co.uk/usa/california/san-francisco/the-st-regis-san-francisco/ |
| | San Francisco | The Fairmont San Francisco | http://northamericatravelservice.co.uk/usa/california/san-francisco/the-fairmont-san-francisco/ |
| | Beverly Hills | Beverly Wilshire, A Four Seasons Hotel | http://northamericatravelservice.co.uk/usa/california/los-angeles/beverly-wilshire-a-four-seasons-hotel/ |
| | Beverly Hills | The Peninsula Beverly Hills | http://northamericatravelservice.co.uk/usa/california/los-angeles/the-peninsula-beverly-hills/ |
| | Los Angeles | Hotel Bel-Air, Dorchester Collection | http://northamericatravelservice.co.uk/usa/california/los-angeles/hotel-bel-air/ |
| | Marina del Rey | The Ritz-Carlton, Marina del Rey | http://northamericatravelservice.co.uk/usa/california/los-angeles/the-ritz-carlton-marina-del-rey/ |
| | Los Angeles | SLS at Beverly Hills | http://northamericatravelservice.co.uk/usa/california/los-angeles/sls-hotel-at-beverly-hills/ |
| | West Hollywood | Andaz West Hollywood | http://northamericatravelservice.co.uk/usa/california/los-angeles/andaz-west-hollywood/ |
| | Beverly Hills | Montage Beverly Hills | http://northamericatravelservice.co.uk/usa/california/los-angeles/montage-beverly-hills/ |
| | Beverly Hills | Mr. C Beverly Hills | http://northamericatravelservice.co.uk/usa/california/los-angeles/mr-c-beverly-hills/ |
| | La Jolla | The Lodge at Torrey Pines | http://northamericatravelservice.co.uk/usa/california/san-diego/the-lodge-at-torrey-pines-la-jolla/ |
| | San Diego | Manchester Grand Hyatt San Diego | http://northamericatravelservice.co.uk/usa/california/san-diego/manchester-grand-hyatt-san-diego/ |
| | San Diego | Hotel del Coronado | http://northamericatravelservice.co.uk/usa/california/san-diego/hotel-del-coronado/ |
| | Rancho Santa Fe | The Inn at Rancho Santa Fe | http://northamericatravelservice.co.uk/usa/california/san-diego/the-inn-at-rancho-santa-fe/ |
| | Rancho Santa Fe | Rancho Valencia Resort & Spa | http://northamericatravelservice.co.uk/usa/california/san-diego/rancho-valencia-rancho-santa-fe/ |
| Carmel | Carmel Valley Ranch | http://northamericatravelservice.co.uk/usa/california/carmel/carmel-valley-ranch/ | |

APPENDIX - UK TRADE LUXURY PRODUCT ANALYSIS

| UK TOUR OPERATOR | DESTINATION | LUXURY HOTEL | URL |
|-------------------------------|-----------------------|---|---|
| NORTH AMERICAN TRAVEL SERVICE | Huntington Beach | Hyatt Regency Huntington Beach Resort & Spa | http://northamericatravelservice.co.uk/usa/california/huntington-beach/hyatt-regency-huntington-beach-resort-spa/ |
| | Laguna Beach | Montage Laguna Beach | http://northamericatravelservice.co.uk/usa/california/laguna-beach/montage-resort-spa/ |
| | Dana Point | The Ritz-Carlton, Laguna Niguel | http://northamericatravelservice.co.uk/usa/california/laguna-beach/the-ritz-carlton-laguna-niguel/ |
| | Sonoma | The Fairmont Sonoma Mission Inn & Spa | http://northamericatravelservice.co.uk/usa/california/napa-wine-region/the-fairmont-sonoma-mission-inn-spa/ |
| | Newport Beach | Balboa Bay Resort | http://northamericatravelservice.co.uk/usa/california/newport-beach/balboa-bay-resort/ |
| | Indian Wells | Hyatt Regency Indian Wells Resort & Spa | http://northamericatravelservice.co.uk/usa/california/palm-springs-desert-resorts/hyatt-regency-indian-wells-resort-spa/ |
| | Santa Barbara | Four Seasons Resort, The Biltmore, Santa Barbara | http://northamericatravelservice.co.uk/usa/california/santa-barbara/four-seasons-resort-the-biltmore/ |
| | Santa Barbara | Canary, a Kimpton Hotel | http://northamericatravelservice.co.uk/usa/california/santa-barbara/canary-santa-barbara/ |
| | Santa Barbara | Bacara Resort & Spa | http://northamericatravelservice.co.uk/usa/california/santa-barbara/bacara-resort-and-spa/ |
| | Santa Monica | Shutters on the Beach | http://northamericatravelservice.co.uk/usa/california/santa-monica/shutters-on-the-beach/ |
| | Santa Monica | Fairmont Miramar Hotel & Bungalows | http://northamericatravelservice.co.uk/usa/california/santa-monica/fairmont-miramar-hotel-bungalows/ |
| | Santa Monica | Loews Santa Monica Beach Hotel | http://northamericatravelservice.co.uk/usa/california/santa-monica/loews-santa-monica-beach-hotel/ |
| | Santa Monica | Viceroy Santa Monica | http://northamericatravelservice.co.uk/usa/california/santa-monica/viceroy/ |
| | Newport Coast | The Resort at Pelican Hill | http://northamericatravelservice.co.uk/usa/california/newport-coast/the-resort-at-pelican-hill/ |
| | Truckee | The Ritz-Carlton, Lake Tahoe | http://northamericatravelservice.co.uk/usa/california/lake-tahoe/the-ritz-carlton-lake-tahoe/ |
| | Half Moon Bay | The Ritz-Carlton, Half Moon Bay | http://northamericatravelservice.co.uk/usa/california/half-moon-bay/the-ritz-carlton-half-moon-bay/ |
| St. Helena | Meadowood Napa Valley | http://northamericatravelservice.co.uk/usa/california/napa-wine-region/meadowood-napa-valley/ | |
| AUDLEY TRAVEL | West Hollywood | Andaz West Hollywood | https://www.audleytravel.com/usa/california/accommodation/andaz-west-hollywood |
| | Santa Barbara | Bacara Resort & Spa | https://www.audleytravel.com/usa/california/accommodation/bacara-resort-and-spa |
| | Beverly Hills | Beverly Wilshire, A Four Seasons Hotel | https://www.audleytravel.com/usa/california/accommodation/beverly-wilshire |

APPENDIX - UK TRADE LUXURY PRODUCT ANALYSIS

| UK TOUR OPERATOR | DESTINATION | LUXURY HOTEL | URL |
|------------------|----------------------------|---|---|
| AUDLEY TRAVEL | Carmel | Carmel Valley Ranch | https://www.audleytravel.com/usa/california/accommodation/carmel-valley-ranch |
| | San Luis Obispo | Dolphin Bay Resort & Spa | https://www.audleytravel.com/usa/california/accommodation/dolphin-bay-resort-and-spa |
| | San Francisco | Fairmont Heritage Place, Ghirardelli Square | https://www.audleytravel.com/usa/california/accommodation/fairmont-heritage-place |
| | Los Angeles | Hotel Bel-Air, Dorchester Collection | https://www.audleytravel.com/usa/california/accommodation/hotel-bel-air |
| | San Diego | Hotel del Coronado | https://www.audleytravel.com/usa/california/accommodation/hotel-del-coronado |
| | Los Angeles | Intercontinental Los Angeles, Century City | https://www.audleytravel.com/usa/california/accommodation/intercontinental-hotel |
| | La Quinta | La Quinta Resort & Club | https://www.audleytravel.com/usa/california/accommodation/la-quinta-palm-springs |
| | Santa Monica | Loews Santa Monica Beach Hotel | https://www.audleytravel.com/usa/california/accommodation/loews-santa-monica |
| | Beverly Hills | The Peninsula Beverly Hills | https://www.audleytravel.com/usa/california/accommodation/the-peninsula-beverly-hills |
| | Sonoma | Renaissance Lodge | https://www.audleytravel.com/usa/california/accommodation/renaissance-lodge-at-sonoma |
| | Marina del Rey | The Ritz-Carlton, Marina del Rey | https://www.audleytravel.com/usa/california/accommodation/ritz-carlton-marina-del-rey |
| | San Diego | The US GRANT - A Luxury Collection Hotel | https://www.audleytravel.com/usa/california/accommodation/the-us-grant-hotel |
| | Santa Monica | Viceroy Santa Monica | https://www.audleytravel.com/usa/california/accommodation/viceroy-hotel-santa-monica |
| ORIGINAL TRAVEL | Santa Monica | Shutters on the Beach | http://www.originaltravel.co.uk/north-america/usa/shutters-on-the-beach |
| | Beverly Hills | Beverly Wilshire, A Four Seasons Hotel | http://www.originaltravel.co.uk/north-america/usa/four-seasons-beverly-wilshire |
| | Orange County | The Resort at Pelican Hill | http://www.originaltravel.co.uk/north-america/usa/the-resort-at-pelican-hill |
| | Beverly Hills | Beverly Hills Hotel | http://www.originaltravel.co.uk/north-america/usa/beverly-hills-hotel |
| | Beverly Hills | SLS Hotel at Beverly Hills | http://www.originaltravel.co.uk/north-america/usa/sls-hotel-beverly-hills |
| | San Francisco | Hotel Vitale | http://www.originaltravel.co.uk/north-america/usa/hotel-vitale |
| | San Francisco | The St. Regis San Francisco | http://www.originaltravel.co.uk/north-america/usa/st-regis-san-francisco |
| San Francisco | The Fairmont San Francisco | http://www.originaltravel.co.uk/north-america/usa/the-fairmont-san-francisco | |

APPENDIX - UK TRADE LUXURY PRODUCT ANALYSIS

| UK TOUR OPERATOR | DESTINATION | LUXURY HOTEL | URL |
|--------------------|------------------|--|---|
| ORIGINAL TRAVEL | Big Sur | Post Ranch Inn | http://www.originaltravel.co.uk/north-america/usa/post-ranch-inn |
| | Santa Barbara | The Four Seasons | http://www.originaltravel.co.uk/north-america/usa/four-seasons-santa-barbara |
| | Santa Barbara | Belmond El Encanto | http://www.originaltravel.co.uk/north-america/usa/el-encanto |
| | Carmel | Carmel Valley Ranch | http://www.originaltravel.co.uk/north-america/usa/carmel-valley-ranch |
| | Napa | The Carneros Inn | http://www.originaltravel.co.uk/north-america/usa/the-carneros-inn |
| | San Francisco | Cavallo Point | http://www.originaltravel.co.uk/north-america/usa/cavallo-point |
| ITC LUXURY TRAVEL | Santa Monica | Casa del Mar | https://www.itcluxurytravel.co.uk/destinations/the-americas/california/hotels/casa-del-mar |
| | Santa Barbara | Four Seasons Resort, The Biltmore, Santa Barbara | https://www.itcluxurytravel.co.uk/destinations/the-americas/california/hotels/four-seasons-resort-the-biltmore-santa-barbara |
| | Santa Monica | Shutters on the Beach | https://www.itcluxurytravel.co.uk/destinations/the-americas/california/hotels/shutters-on-the-beach |
| | Orange County | The Resort at Pelican Hill | https://www.itcluxurytravel.co.uk/destinations/the-americas/california/hotels/the-resort-at-pelican-hill |
| | Beverly Hills | Beverly Wilshire, A Four Seasons Hotel | https://www.itcluxurytravel.co.uk/destinations/the-americas/usa-cities/los-angeles/hotels/beverly-wilshire-a-four-seasons-hotel |
| WESTERN & ORIENTAL | San Francisco | The Fairmont San Francisco | http://www.westernoriental.com/holiday/the-fairmont-san-francisco-usa/ |
| | San Francisco | Taj Campton Place | http://www.westernoriental.com/holiday/taj-campton-place-usa/ |
| | Carmel | Carmel Valley Ranch | http://www.westernoriental.com/holiday/carmel-valley-ranch-usa/ |
| | Big Sur | Post Ranch Inn | http://www.westernoriental.com/holiday/post-ranch-inn-usa/ |
| | Orange County | The Resort at Pelican Hill | http://www.westernoriental.com/holiday/the-resort-at-pelican-hill-usa/ |
| | Huntington Beach | Hyatt Regency Huntington Beach Resort & Spa | http://www.westernoriental.com/holiday/hyatt-regency-huntington-beach-resort-and-spa-usa/ |
| | Beverly Hills | Beverly Wilshire, A Four Seasons Hotel | http://www.westernoriental.com/holiday/beverly-wilshire-a-four-seasons-hotel-usa/ |
| | La Quinta | La Quinta Resort & Club | http://www.westernoriental.com/holiday/la-quinta-resort-club-a-waldorf-astoria-resort-usa/ |
| | Indian Wells | Hyatt Regency Indian Wells Resort & Spa | http://www.westernoriental.com/holiday/hyatt-regency-indian-wells-resort-and-spa-usa/ |
| | San Diego | The US GRANT - A Luxury Collection Hotel | http://www.westernoriental.com/holiday/the-us-grant-usa/ |
| | Rancho Santa Fe | Rancho Valencia Resort & Spa | http://www.westernoriental.com/holiday/rancho-valencia-usa/ |
| | San Diego | Hotel del Coronado | http://www.westernoriental.com/holiday/hotel-del-coronado-usa/ |
| | Santa Barbara | Belmond El Encanto | http://www.westernoriental.com/holiday/belmond-el-encanto-usa/ |
| | Santa Barbara | Four Seasons Resort, The Biltmore, Santa Barbara | http://www.westernoriental.com/holiday/four-seasons-the-biltmore-usa/ |

APPENDIX - UK TRADE LUXURY PRODUCT ANALYSIS

| UK TOUR OPERATOR | DESTINATION | LUXURY HOTEL | URL |
|--------------------|---------------|--|---|
| WESTERN & ORIENTAL | Santa Monica | Shutters on the Beach | http://www.westernoriental.com/holiday/shutters-on-the-beach-usa/ |
| | Santa Monica | Loews Santa Monica Beach Hotel | http://www.westernoriental.com/holiday/loews-santa-monica-usa/ |
| | Santa Monica | Hotel Casa del Mar | http://www.westernoriental.com/holiday/casa-del-mar-usa/ |
| | Santa Monica | Fairmont Miramar Hotel & Bungalows | http://www.westernoriental.com/holiday/fairmont-miramar-hotel-bungalows-usa/ |
| SCOTT DUNN | Carmel | Carmel Valley Ranch | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/carmel-valley-ranch |
| | Los Angeles | Hotel Bel-Air, Dorchester Collection | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/hotel-belair |
| | Big Sur | Post Ranch Inn | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/post-ranch-inn |
| | Sausalito | Cavallo Point - the Lodge at Golden Gate | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/cavallo-point |
| | Santa Monica | Fairmont Miramar Hotel & Bungalows | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/fairmont-miramar-hotel-bungalows |
| | Santa Barbara | Four Seasons Resort, The Biltmore, Santa Barbara | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/four-seasons-biltmore |
| | San Francisco | Hotel Vitale | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/hotel-vitale |
| | Orange County | The Resort at Pelican Hill | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/resort-at-pelican-hill |
| | Santa Barbara | San Ysidro Ranch | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/san-ysidro-ranch |
| | Santa Monica | Shutters on the Beach | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/shutters-on-the-beach |
| | Santa Monica | Viceroy Santa Monica | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/viceroy-santa-monica |
| | Santa Barbara | Bacara Resort & Spa | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/bacara-resort-spa |
| | Santa Barbara | Belmond El Encanto | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/belmond-el-encanto |
| | San Francisco | Fairmont Heritage Place, Ghirardelli Square | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/fairmont-heritage-place |
| | Santa Barbara | Canary, a Kimpton Hotel | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/canary-santa-barbara |
| | Beverly Hills | Beverly Wilshire, A Four Seasons Hotel | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/four-seasons-beverly-wilshire |
| | San Francisco | Four Seasons Hotel San Francisco | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/four-seasons-hotel-san-francisco |
| | Santa Monica | Hotel Casa del Mar | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/hotel-casa-del-mar |

APPENDIX - UK TRADE LUXURY PRODUCT ANALYSIS

| UK TOUR OPERATOR | DESTINATION | LUXURY HOTEL | URL |
|-----------------------|------------------|---|---|
| SCOTT DUNN | San Diego | Hotel del Coronado | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/hotel-del-coronado |
| | La Quinta | La Quinta Resort & Club | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/la-quinta |
| | Rancho Santa Fe | Rancho Valencia Resort & Spa | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/rancho-valencia |
| | San Francisco | The Ritz-Carlton, San Francisco | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/ritz-carlton-san-francisco |
| | Beverley Hills | Beverley Hills Hotel | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/the-beverly-hills-hotel-sunset-boulevard |
| | Santa Monica | Oceana Beach Club Hotel | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/oceana-santa-monica |
| | Laguna Beach | Surf & Sand Resort | https://www.scottdunn.com/luxury-holidays/americas/north-america/united-states-of-america/california/surf-and-sand-resort-laguna-beach |
| THOMAS COOK SIGNATURE | San Francisco | The Ritz-Carlton, San Francisco | https://www.thomascook.com/holidays/signature/usa/california/#intcmp=Signature_PopularDest6_California |
| | San Francisco | The Fairmont San Francisco | https://www.thomascook.com/holidays/signature/usa/california/#intcmp=Signature_PopularDest6_California |
| | San Francisco | Clift | https://www.thomascook.com/holidays/signature/usa/california/#intcmp=Signature_PopularDest6_California |
| | Sonoma | The Fairmont Sonoma Mission Inn & Spa | https://www.thomascook.com/holidays/signature/usa/california/#intcmp=Signature_PopularDest6_California |
| | Santa Barbara | Canary, a Kimpton Hotel | https://www.thomascook.com/holidays/signature/usa/california/#intcmp=Signature_PopularDest6_California |
| | Huntington Beach | Hyatt Regency Huntington Beach Resort & Spa | https://www.thomascook.com/holidays/signature/usa/california/#intcmp=Signature_PopularDest6_California |
| | Beverly Hills | Beverly Wilshire, A Four Seasons Hotel | https://www.thomascook.com/holidays/signature/usa/california/#intcmp=Signature_PopularDest6_California |
| | West Hollywood | Andaz West Hollywood | https://www.thomascook.com/holidays/signature/usa/california/#intcmp=Signature_PopularDest6_California |
| | Santa Monica | Casa del Mar | https://www.thomascook.com/holidays/signature/usa/california/#intcmp=Signature_PopularDest6_California |
| | Santa Monica | Shutters on the Beach | https://www.thomascook.com/holidays/signature/usa/california/#intcmp=Signature_PopularDest6_California |
| | Santa Monica | Fairmont Miramar Hotel & Bungalows | https://www.thomascook.com/holidays/signature/usa/california/#intcmp=Signature_PopularDest6_California |
| | San Diego | The US GRANT - A Luxury Collection Hotel | https://www.thomascook.com/holidays/signature/usa/california/#intcmp=Signature_PopularDest6_California |

APPENDIX - UK TRADE LUXURY PRODUCT ANALYSIS

| UK TOUR OPERATOR | DESTINATION | LUXURY HOTEL | URL |
|-------------------|-----------------|---|---|
| MRS AND MRS SMITH | Santa Monica | Viceroy Santa Monica | https://www.mrandmrsmith.com/luxury-hotels/viceroy-santa-monica?s%5Btags%5D=destination.destination%3Anorth-america%3Bdestination.destination%3Anorth-america.united-states.california |
| | Santa Monica | Oceana Beach Club Hotel | https://www.mrandmrsmith.com/luxury-hotels/oceana-beach-club-hotel?s%5Btags%5D=destination.destination%3Anorth-america%3Bdestination.destination%3Anorth-america.united-states.california |
| | Sausalito | Cavallo Point - the Lodge at Golden Gate | https://www.mrandmrsmith.com/luxury-hotels/cavallo-point?s%5Btags%5D=destination.destination%3Anorth-america%3Bdestination.destination%3Anorth-america.united-states.california |
| | Rancho Santa Fe | Rancho Valencia Resort & Spa | https://www.mrandmrsmith.com/luxury-hotels/rancho-valencia?s%5Btags%5D=destination.destination%3Anorth-america%3Bdestination.destination%3Anorth-america.united-states.california |
| | Big Sur | Post Ranch Inn | https://www.mrandmrsmith.com/luxury-hotels/post-ranch-inn?s%5Btags%5D=destination.destination%3Anorth-america%3Bdestination.destination%3Anorth-america.united-states.california |
| | Santa Barbara | Belmond El Encanto | https://www.mrandmrsmith.com/luxury-hotels/belmond-el-encanto?s%5Btags%5D=destination.destination%3Anorth-america%3Bdestination.destination%3Anorth-america.united-states.california |
| VIRTUOSO | Napa Valley | Bardessono Hotel and Spa | https://www.virtuoso.com/hotels/15275538/bardessono-hotel-spa#.V9LJfJgrKUK |
| | Santa Barbara | Belmond El Encanto | https://www.virtuoso.com/hotels/12346520/belmond-el-encanto#.V9LJfpggrKUK |
| | Beverly Hills | Beverly Wilshire, A Four Seasons Hotel | https://www.virtuoso.com/hotels/6163997/beverly-wilshire-a-four-seasons-hotel#.V9LJgJgrKUK |
| | Napa Valley | Calistoga Ranch | https://www.virtuoso.com/hotels/6164049/calistoga-ranch#.V9LJgZgrKUK |
| | Carmel | Carmel Valley Ranch | https://www.virtuoso.com/hotels/11074783/carmel-valley-ranch#.V9LJhpgrKUK |
| | Pebble Beach | Casa Palmero At Pebble Beach Resorts | https://www.virtuoso.com/hotels/13783647/casa-palmero-at-pebble-beach-resorts#.V9LJiJgrKUK |
| | Sausalito | Cavallo Point | https://www.virtuoso.com/hotels/13650270/cavallo-point-the-lodge-at-golden-gate#.V9LJi5grKUK |
| | San Diego | Fairmont Grand Del Mar | https://www.virtuoso.com/hotels/6164027/fairmont-grand-del-mar#.V9LKJpgrKUK |
| | San Francisco | Fairmont Heritage Place, Ghirardelli Square | https://www.virtuoso.com/hotels/6164416/fairmont-heritage-place-ghirardelli-square#.V9LKKZgrKUK |
| | Santa Monica | Fairmont Miramar Hotel & Bungalows | https://www.virtuoso.com/hotels/6164524/fairmont-miramar-hotel-bungalows#.V9LKKZgrKUK |
| | San Francisco | Fairmont San Francisco | https://www.virtuoso.com/hotels/9870036/fairmont-san-francisco#.V9LKLZgrKUK |
| | Sonoma | Fairmont Sonoma Mission Inn & Spa | https://www.virtuoso.com/hotels/6163968/fairmont-sonoma-mission-inn-spa#.V9LKL5grKUK |

APPENDIX - UK TRADE LUXURY PRODUCT ANALYSIS

| UK TOUR OPERATOR | DESTINATION | LUXURY HOTEL | URL |
|------------------|------------------|---|---|
| VIRTUOSO | Sonoma | Farmhouse Inn | https://www.virtuoso.com/hotels/14878342/farmhouse-inn#.V9LK-MZgrKUK |
| | Los Angeles | Four Seasons Hotel Los Angeles At Beverly Hills | https://www.virtuoso.com/hotels/6163686/four-seasons-hotel-los-angeles-at-beverly-hills#.V9LKMpgrKUK |
| | San Francisco | Four Seasons Hotel San Francisco | https://www.virtuoso.com/hotels/6164002/four-seasons-hotel-san-francisco#.V9LK3pgrKUK |
| | Santa Barbara | Four Seasons Resort, Santa Barbara | https://www.virtuoso.com/hotels/6163810/four-seasons-resort-santa-barbara#.V9LK4JgrKUK |
| | San Francisco | Golden Door | https://www.virtuoso.com/hotels/13101650/golden-door#.V9LK4pgrKUK |
| | Bel-Air | Hotel Bel-Air, Dorchester Collection | https://www.virtuoso.com/hotels/6164171/hotel-bel-air-dorchester-collection#.V9LK5ZgrKUK |
| | Santa Monica | Hotel Casa Del Mar | https://www.virtuoso.com/hotels/6163655/hotel-casa-del-mar#.V9LK6ZgrKUK |
| | San Diego | Hotel Del Coronado | https://www.virtuoso.com/hotels/6164122/hotel-del-coronado#.V9LK-6JgrKUK |
| | Indian Wells | Hyatt Regency Indian Wells Resort & Spa | https://www.virtuoso.com/hotels/6164331/hyatt-regency-indian-wells-resort-spa#.V9LK6pgrKUK |
| | Los Angeles | InterContinental Los Angeles Century City | https://www.virtuoso.com/hotels/6163995/intercontinental-los-angeles-century-city#.V9LK7ZgrKUK |
| | Newport Beach | Island Hotel Newport Beach | https://www.virtuoso.com/hotels/6163692/island-hotel-newport-beach#.V9LK7pgrKUK |
| | La Quinta | La Quinta Resort & Club, A Waldorf Astoria Resort | https://www.virtuoso.com/hotels/6163996/la-quinta-resort-club-a-waldorf-astoria-resort#.V9LK9ZgrKUK |
| | La Jolla | La Valencia Hotel At La Jolla | https://www.virtuoso.com/hotels/6163972/la-valencia-hotel-at-la-jolla#.V9LK95grKUK |
| | Dana Point | The St. Regis Monarch Beach Resort | https://www.virtuoso.com/hotels/6164154/monarch-beach-resort#.V9LUDCgrKUK |
| | Beverly Hills | Montage Beverly Hills | https://www.virtuoso.com/hotels/6164198/montage-beverly-hills#.V9LUTigrKUK |
| | Laguna Beach | Montage Laguna Beach | https://www.virtuoso.com/hotels/6163716/montage-laguna-beach#.V9LUdCgrKUK |
| | Ojai | Ojai Valley Inn & Spa | https://www.virtuoso.com/hotels/6164259/ojai-valley-inn-spa#.V9LU_SgrKUK |
| | San Francisco | Palace Hotel | https://www.virtuoso.com/hotels/14943807/palace-hotel-a-luxury-collection-hotel-san-francisco#.V9LVMigrKUK |
| | Rancho Santa Fe | Rancho Valencia Resort & Spa | https://www.virtuoso.com/hotels/6164047/rancho-valencia-resort-spa#.V9LVaigrKUK |
| | Big Sur | Post Ranch Inn | https://www.virtuoso.com/hotels/6164520/post-ranch-inn#.V9LVgigrKUK |
| Santa Barbara | San Ysidro Ranch | https://www.virtuoso.com/hotels/6164019/san-ysidro-ranch#.V9LVtygrKUK | |

APPENDIX - UK TRADE LUXURY PRODUCT ANALYSIS

| UK TOUR OPERATOR | DESTINATION | LUXURY HOTEL | URL |
|------------------|-------------------|---|---|
| VIRTUOSO | Santa Monica | Shutters on the Beach | https://www.virtuoso.com/hotels/6163820/shutters-on-the-beach#.V9LV2ygrKUI |
| | Los Angeles | SLS at Beverly Hills | https://www.virtuoso.com/hotels/6164365/sls-hotel-a-luxury-collection-hotel-beverly-hills#.V9LWBygrKUK |
| | West Hollywood | Sunset Tower Hotel | https://www.virtuoso.com/hotels/14577098/sunset-tower-hotel#.V9LWXsgrKUK |
| | Beverly Hills | The Beverly Hills Hotel, Dorchester Collection | https://www.virtuoso.com/hotels/6163736/the-beverly-hills-hotel-dorchester-collection#.V9LWICgrKUK |
| | Napa | The Carneros Inn | https://www.virtuoso.com/hotels/6163759/the-carneros-inn#.V9LW1CgrKUK |
| | Beverly Hills | The Peninsula Beverly Hills | https://www.virtuoso.com/hotels/6164251/the-peninsula-beverly-hills#.V9LXHsgrKUK |
| | Malibu | The Ranch at Live Oak, Malibu | https://www.virtuoso.com/hotels/9891687/the-ranch-malibu#.V9LXTCgrKUK |
| | Newport Coast | The Resort at Pelican Hill | https://www.virtuoso.com/hotels/6164155/the-resort-at-pelican-hill#.V9LXeCgrKUK |
| | Half Moon Bay | The Ritz-Carlton, Half Moon Bay | https://www.virtuoso.com/hotels/6163999/the-ritz-carlton-half-moon-bay#.V9LXvCgrKUK |
| | Dana Point | The Ritz-Carlton, Laguna Niguel | https://www.virtuoso.com/hotels/6164260/the-ritz-carlton-laguna-niguel#.V9LYASgrKUK |
| | Marina del Rey | The Ritz-Carlton, Marina del Rey | https://www.virtuoso.com/hotels/6164342/the-ritz-carlton-marina-del-rey#.V9LYRCgrKUK |
| | Rancho Mirage | The Ritz-Carlton, Rancho Mirage | https://www.virtuoso.com/hotels/14328153/the-ritz-carlton-rancho-mirage#.V9LYdygrKUK |
| | San Francisco | The Ritz-Carlton, San Francisco | https://www.virtuoso.com/hotels/6164199/the-ritz-carlton-san-francisco#.V9LYmigrKUK |
| | San Francisco | The St. Regis San Francisco | https://www.virtuoso.com/hotels/6163955/the-st-regis-san-francisco#.V9LZQigrKUK |
| | San Diego | The US GRANT - A Luxury Collection Hotel | https://www.virtuoso.com/hotels/6164282/the-us-grant-a-luxury-collection-hotel-san-diego#.V9LZXigrKUK |
| Big Sur | Ventana Inn & Spa | https://www.virtuoso.com/hotels/11947582/ventana-inn-spa#.V9LaESgrKUK | |

CALIFORNIA LUXURY OFFERINGS, CANADA - JULY 2016 PRODUCT ANALYSIS

| CANADA TOUR OPERATOR | DESTINATION | LUXURY HOTEL | URL |
|--------------------------|--------------------------------|---|---|
| BUTTERFIELD AND ROBINSON | Los Olivos | Fess Parker Inn and Spa | http://www.butterfield.com/trip/santa-barbara-multi-active-private/ |
| | Santa Barbara | San Ysidro Ranch | http://www.butterfield.com/trip/santa-barbara-multi-active-private/ |
| | Healdsburg | H2 Hotel | http://www.butterfield.com/trip/napa-and-sonoma-saveur-private/ |
| | Yountville | Hotel Yountville | http://www.butterfield.com/trip/napa-and-sonoma-saveur-private/ |
| | Healdsburg | H2 Hotel | http://www.butterfield.com/trip/napa-sonoma-biking-private/ |
| | Napa | Auberge du Soliel | http://www.butterfield.com/trip/napa-sonoma-biking-private/ |
| | Los Olivos | Fess Parker Inn and Spa | http://www.butterfield.com/custom/california-bespoke/ |
| GRAY AND CO | Calistoga | Calistoga Ranch | http://www.butterfield.com/custom/california-bespoke/ |
| | Los Olivos | Fess Parker Inn and Spa | http://www.grayandco.ca/project/california/ |
| | Montecito | Four Seasons Resort The Biltmore | http://www.grayandco.ca/project/california/ |
| GLOBUS | Santa Barbara | Belmond's El Encanto | http://www.grayandco.ca/project/california/ |
| | San Francisco | San Francisco Marriott Marquis | http://www.globusjourneys.ca/Product.aspx?trip=7AAE |
| | Lake Tahoe | The Lake Tahoe Resort Hotel | http://www.globusjourneys.ca/Product.aspx?trip=7AAE |
| | Yosemite | Yosemite View Lodge | http://www.globusjourneys.ca/Product.aspx?trip=7AAE |
| | Monterey | Hyatt Regency Monterey | http://www.globusjourneys.ca/Product.aspx?trip=7AAE |
| | Pismo Beach | Hilton Garden Inn Pismo Beach | http://www.globusjourneys.ca/Product.aspx?trip=7AAE |
| | Los Angeles | The LA Hotel Downtown | http://www.globusjourneys.ca/Product.aspx?trip=7AAE |
| | San Diego | Hilton San Diego Airport | http://www.globusjourneys.ca/Product.aspx?trip=7AAE |
| | Los Angeles | The LA Hotel Downtown | http://www.globusjourneys.ca/Product.aspx?trip=7AZ |
| | San Diego | Hyatt Regency Mission Bay Spa and Marina | http://www.globusjourneys.ca/Product.aspx?trip=7AZ |
| | Yosemite | Yosemite View Lodge | http://www.globusjourneys.ca/Product.aspx?trip=7AZ |
| | San Francisco | San Francisco Marriott Marquis | http://www.globusjourneys.ca/Product.aspx?trip=7AZ |
| | Cambria | Cambria Pines Lodge | http://www.globusjourneys.ca/Product.aspx?trip=7AZ |
| | Long Beach | Long Beach Renaissance Hotel | http://www.globusjourneys.ca/Product.aspx?trip=7ND |
| | San Diego | Hyatt Regency Mission Bay Spa and Marina | http://www.globusjourneys.ca/Product.aspx?trip=7ND |
| | Palm Springs | Renaissance Palm Springs | http://www.globusjourneys.ca/Product.aspx?trip=7ND |
| | Eureka | Red Lion Hotel | http://www.globusjourneys.ca/Product.aspx?trip=7AQ |
| San Francisco | San Francisco Marriott Marquis | http://www.globusjourneys.ca/Product.aspx?trip=7AQ | |

APPENDIX - CANADA TRADE LUXURY PRODUCT ANALYSIS

| CANADA TOUR OPERATOR | DESTINATION | LUXURY HOTEL | URL |
|----------------------|--|--|---|
| GLOBUS | Los Angeles | The LA Hotel Downtown | http://www.globusjourneys.ca/Product.aspx?trip=7AX |
| | San Francisco | San Francisco Marriott Marquis | http://www.globusjourneys.ca/Product.aspx?trip=7AA |
| | Lake Tahoe | The Lake Tahoe Resort Hotel | http://www.globusjourneys.ca/Product.aspx?trip=7AA |
| | Yosemite | Yosemite View Lodge | http://www.globusjourneys.ca/Product.aspx?trip=7AA |
| | Monterey | Hyatt Regency Monterey | http://www.globusjourneys.ca/Product.aspx?trip=7AA |
| | Pismo Beach | Hilton Garden Inn Pismo Beach | http://www.globusjourneys.ca/Product.aspx?trip=7AA |
| | Los Angeles | The LA Hotel Downtown | http://www.globusjourneys.ca/Product.aspx?trip=7AA |
| | San Francisco | San Francisco Marriott Marquis | http://www.globusjourneys.ca/Product.aspx?trip=7AL |
| | Lake Tahoe | The Lake Tahoe Resort Hotel | http://www.globusjourneys.ca/Product.aspx?trip=7AL |
| | Yosemite | Yosemite View Lodge | http://www.globusjourneys.ca/Product.aspx?trip=7AL |
| | Sequoia | Wuksachi Lodge | http://www.globusjourneys.ca/Product.aspx?trip=7AL |
| | Monterey | Hilton Garden Inn Monterey | http://www.globusjourneys.ca/Product.aspx?trip=7AL |
| | HORIZON HOLIDAYS (formerly Tour Holiday) | | none |
| INSIGHT VACATIONS | San Francisco | Omni San Francisco | https://www.insightvacations.com/ca/tours/best-of-california-summer-2016 |
| | Sonoma | Fairmont Sonoma Mission Inn and Spa | https://www.insightvacations.com/ca/tours/best-of-california-summer-2016 |
| | Yosemite | Yosemite Lodge at the Falls | https://www.insightvacations.com/ca/tours/best-of-california-summer-2016 |
| | Monterey | Monterey Plaza Hotel and Spa | https://www.insightvacations.com/ca/tours/best-of-california-summer-2016 |
| | Santa Barbara | Fess Parker's Doubletree Resort | https://www.insightvacations.com/ca/tours/best-of-california-summer-2016 |
| | Los Angeles | JW Marriott Hotel Los Angeles at LA Live | https://www.insightvacations.com/ca/tours/best-of-california-summer-2016 |
| TRUFFLE PIG | | None - Custom Tours | |

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