

Global Market Profile

CANADA



March 2024

Introduction

- Tourism Economics forecasts domestic leisure visitation will account for \$101B in spending in California in 2024 and international visitation will account for \$29B in spending in the state.
- In this highly competitive environment for tourism dollars and with travel demand normalizing, effective global marketing is critical to California achieving these spending numbers which requires a deep knowledge of the domestic and international markets that drive tourism spending in the state. This includes an understanding of the audience of travelers most likely to visit California in the next year.
- The **Global Market Profile** report has been developed by Visit California Research to provide the organization and the state's tourism industry with insights on California's domestic market and thirteen opportunity international markets through detailed market landscapes as well as highly targeted audience profiles and traveler behavior insights.

Market Landscape:



Audience Insights:



California Traveler & Trip Details:

- **Market Landscape** includes foundational intelligence from Visit California:
 - Visitation and Spending Forecasts
 - Airlift Recovery (flights and seats)
 - Arrival Numbers & California Market Share
 - Consumer travel intent and barriers
- **Audience Insights** includes a profile of target travelers, including:
 - Description and size of Audience Target
 - Demographic profile
 - General travel planning behavior
 - General trip spending
 - Advertising and sports preferences
- **California Traveler & Trip Details** includes details about visitors to California from the past year, including:
 - Trip purpose
 - First/Repeat visitation
 - Destinations visited
 - Travel party, accommodations, activities and expenditures

Methodology & Sources

- The report contains three sections:
 - The **Market Landscape** section is sourced from Visit California's key research partners, including Tourism Economics, NTTO, CIC Research, Cirium and YouGov.
 - The **Audience Insights** section is sourced from YouGov's Global Travel Profiles which tracks travel-related sentiment and behavior in over 25 global markets, including all thirteen Visit California opportunity markets. Panelists are surveyed on preferred trip types, booking methods, accommodation preferences, and advertising perceptions.
 - The audience profile is built on a segmentation of consumers planning international leisure travel in the next 12 months and are considering California as a destination.* The profiles provide insights into those travelers most likely to visit the state.
 - The **California Traveler and Trip Characteristic** section provides information on trips that included a stay in California from the Survey of International Air Travelers (SIAT).

*Profile targets for China and Japan include travelers considering California and/or other U.S. destinations due to sample size limitations.



Market Landscape

Country Profile

Canada



POPULATION: *

38.8M

EXCHANGE RATE: **

Local currency to USD dollar

1.3

GROSS DOMESTIC PRODUCT (GDP):

Annual % chg ***

1.5%

INFLATION RATE:

Annual % chg ****

3.9%

* www.worldometers.info, 2023

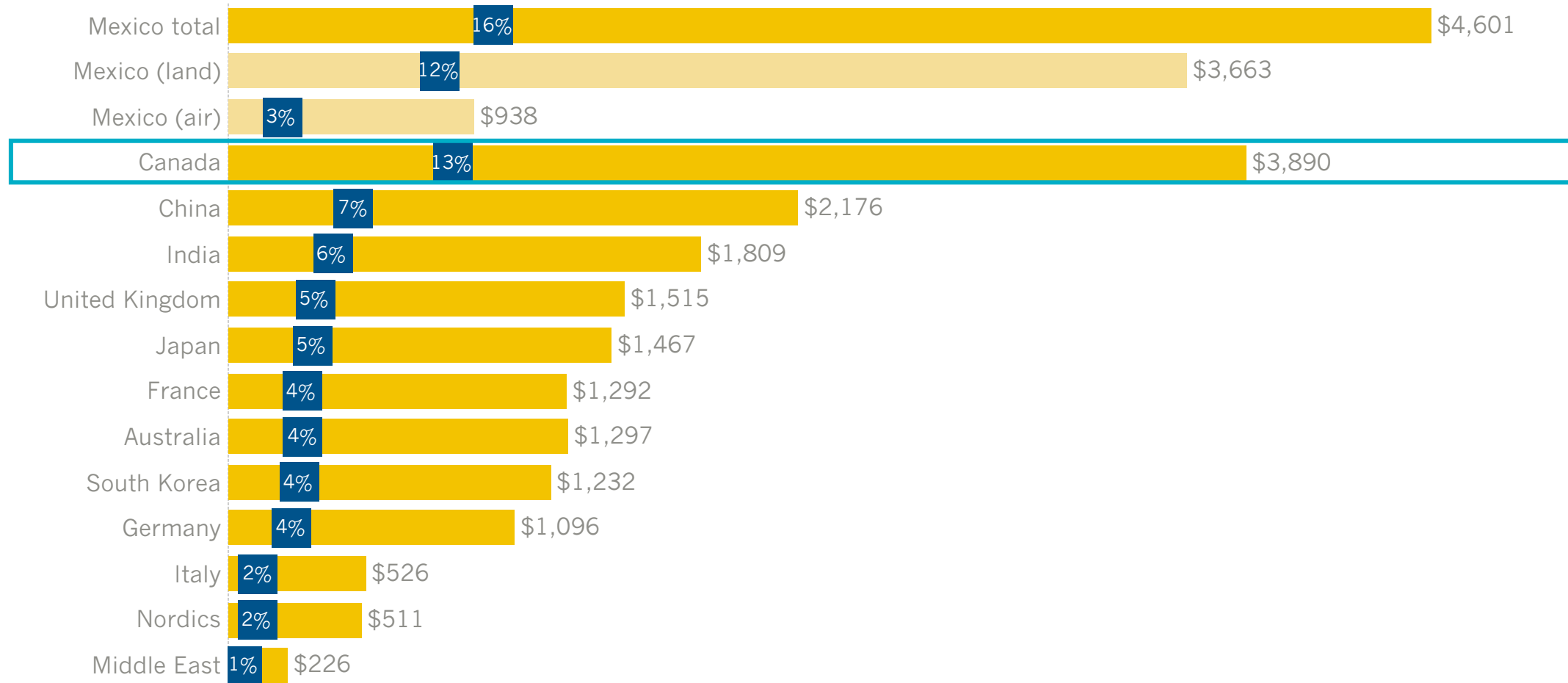
** www.x-rates.com, Feb 2024

*** www.imf.org, 2023

**** www.imf.org, 2023

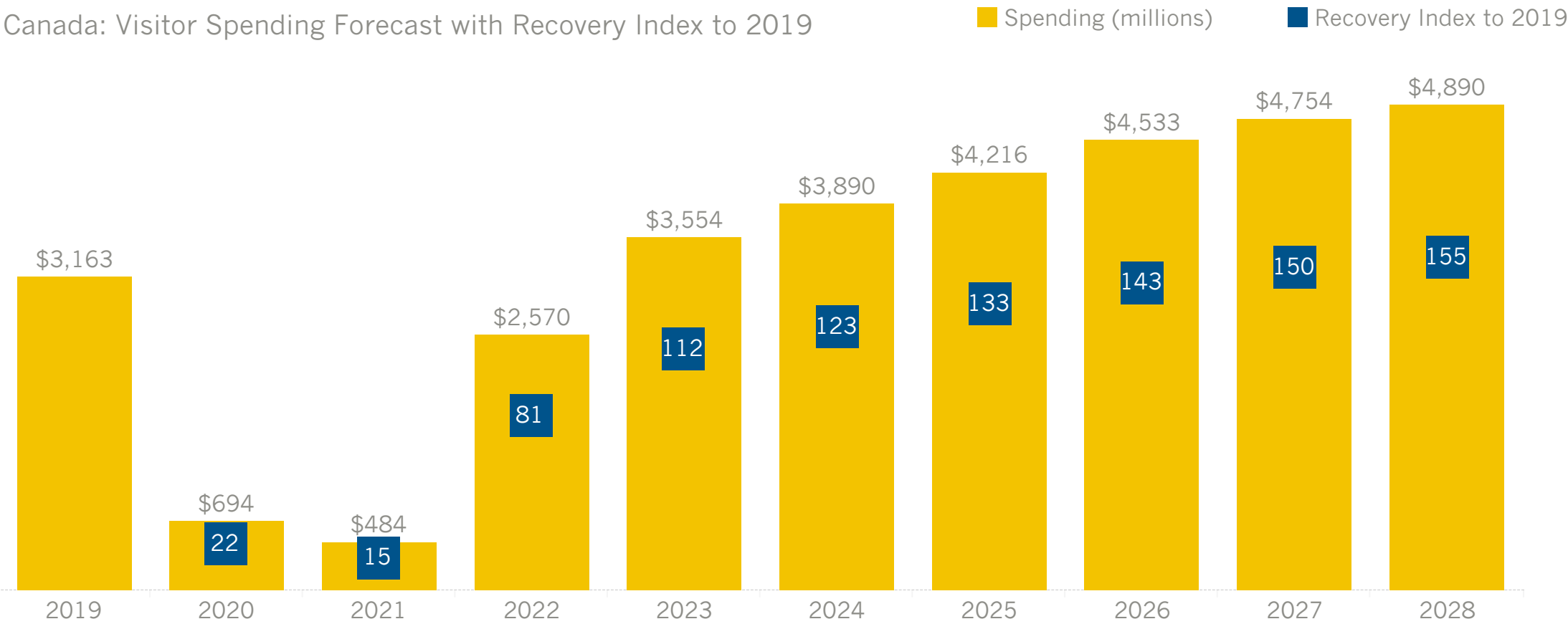
Forecast: Visitor Spending by Market (2024)

The chart below shows California's visitor spending forecast for the state's 14 target markets and share of total international spending in the state.



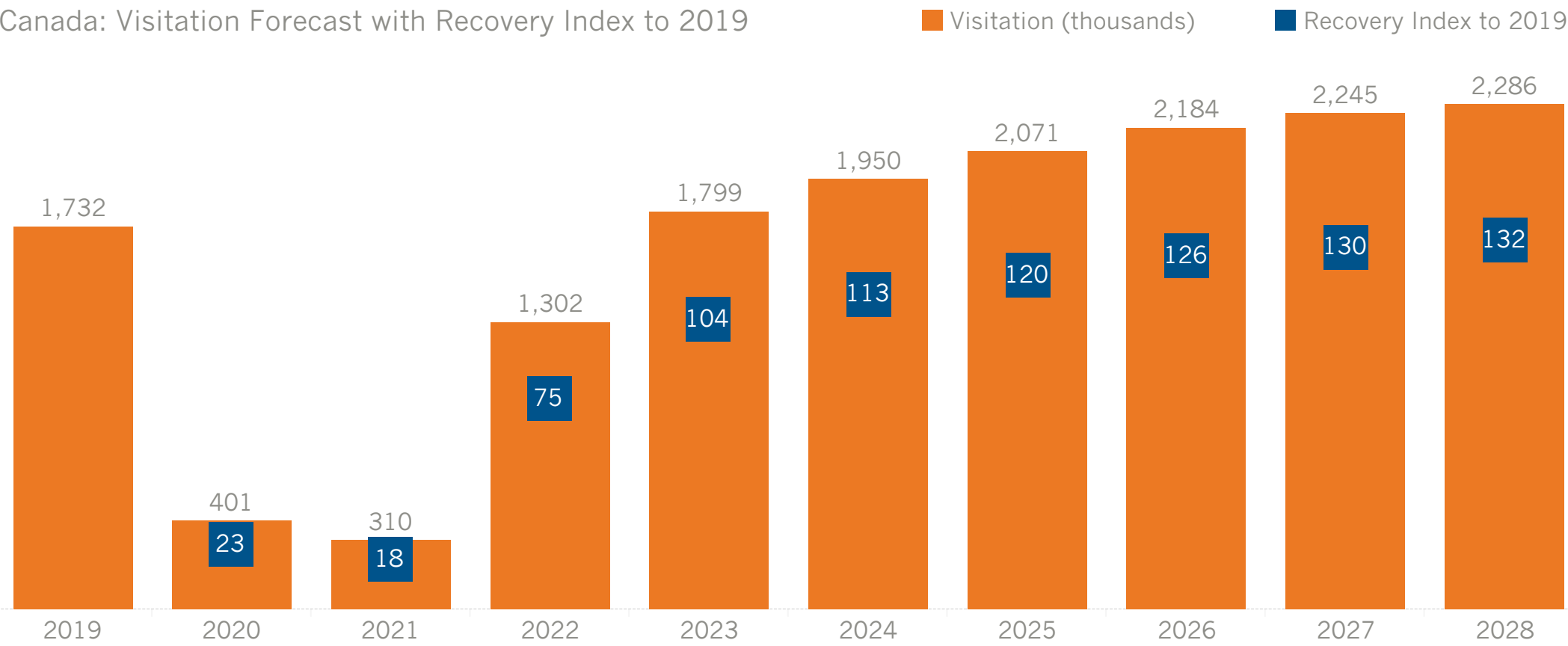
Forecast: Visitor Spending

The chart below shows the state’s visitor spending forecast and the recovery index for the focus market.



Forecast: Visitor Volume

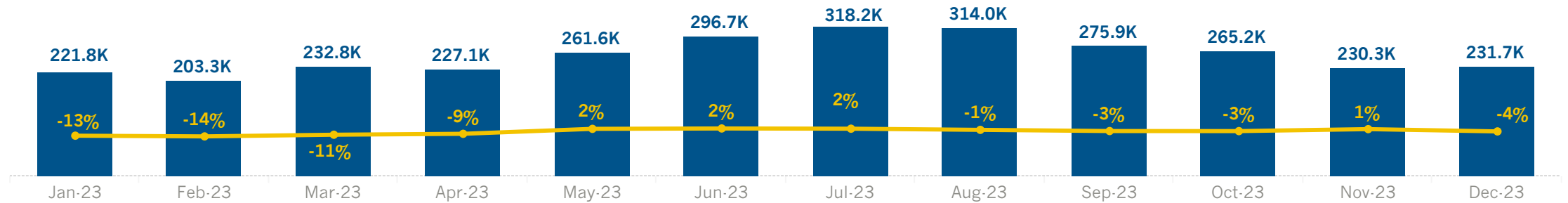
The chart below shows the state’s visitation forecast and recovery index for the focus market.



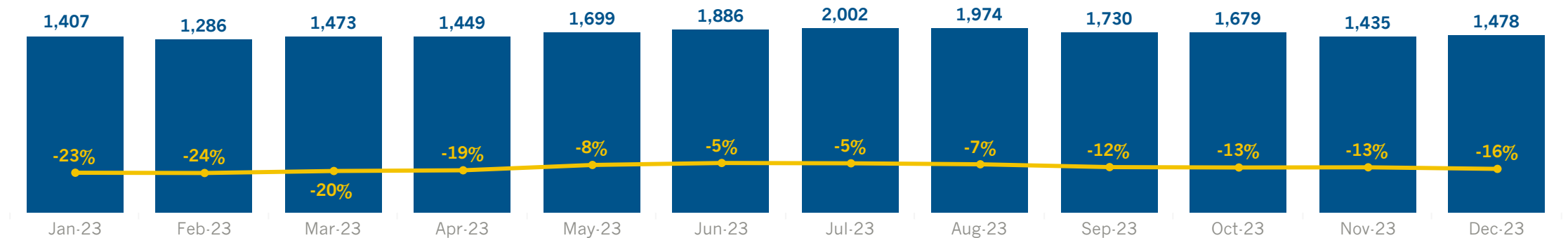
Airlift to California

The charts below shows airlift to California and percent change to 2019 for the focus market.

Canada: Non-Stop Seats to CA (% chg vs 2019)



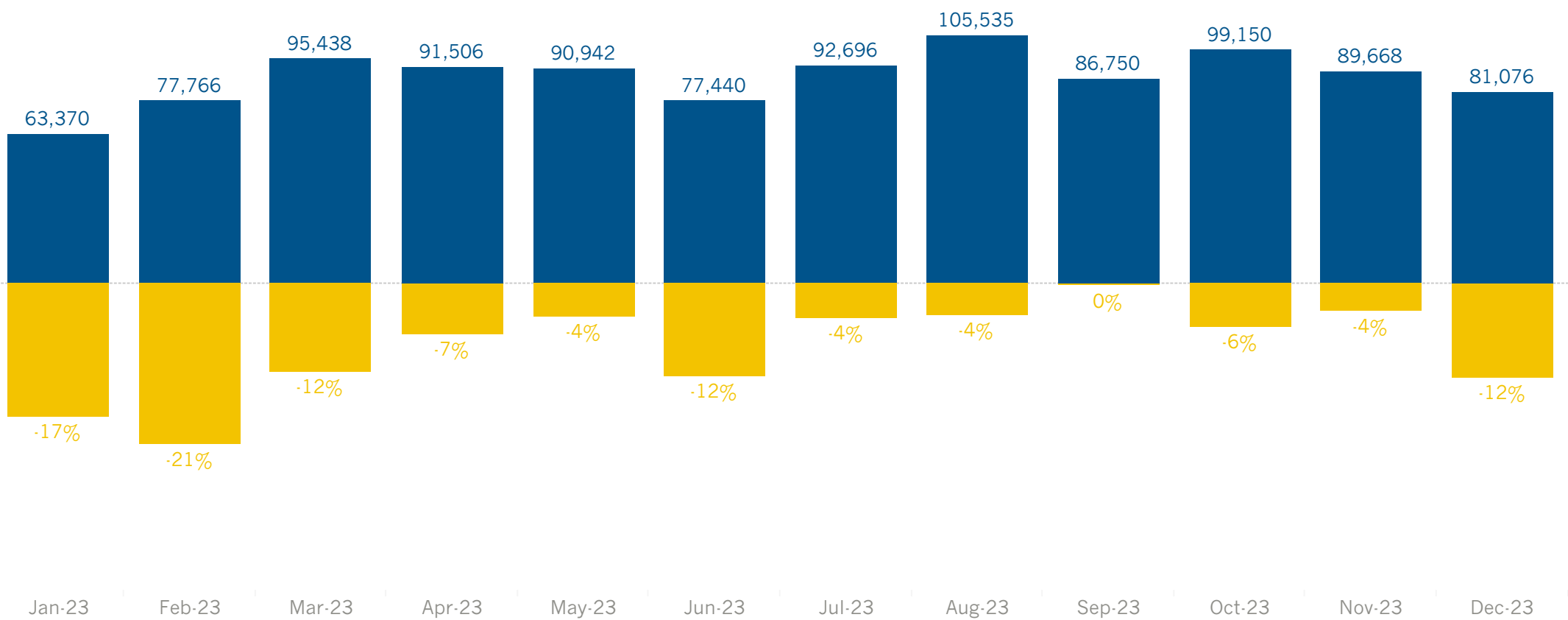
Canada: Non-Stop Flights to CA (% chg vs 2019)



Non-Resident Arrivals to California

The chart below shows non-resident arrivals at California’s ports of entry and percent change to 2019 for the focus market.

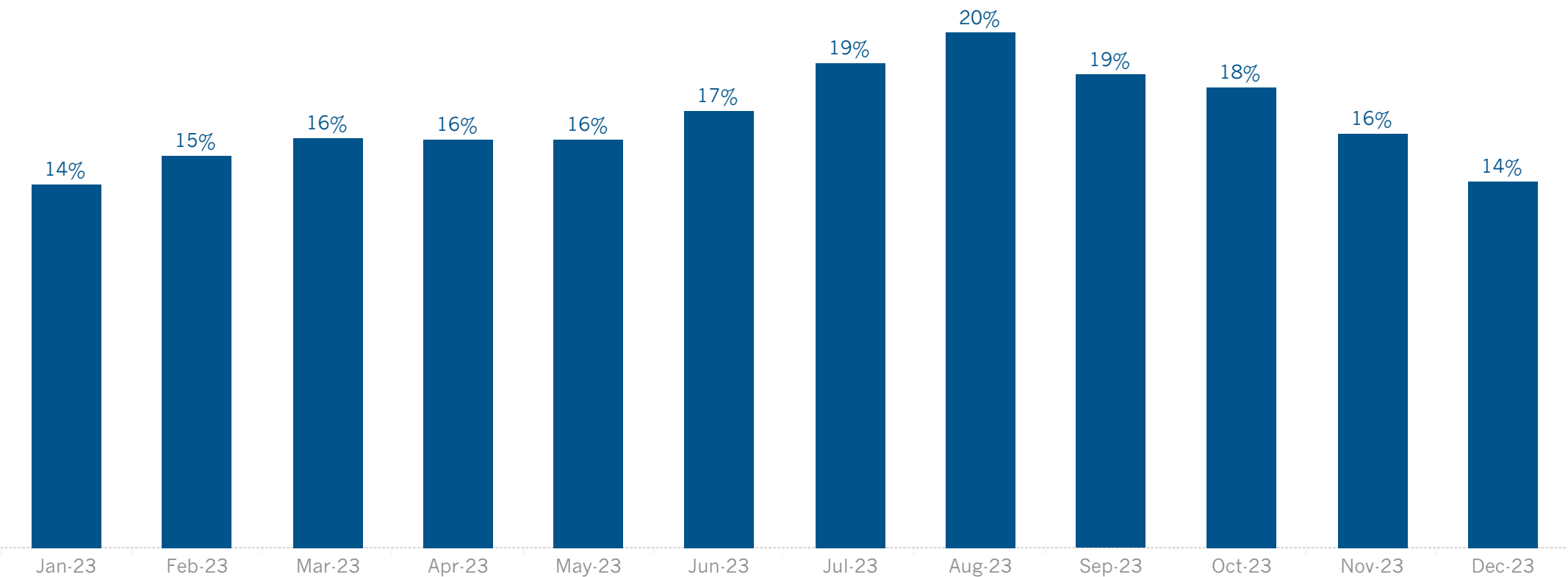
Canada Air Only: Non-Resident Arrivals at CA Ports of Entry (% change vs. 2019)



California's Share of Arrivals

The chart below shows California's share of arrivals from the focus market based on First Intended Address (FIA).

Canada: California Market Share of Arrivals Based on First Intended Address (%)



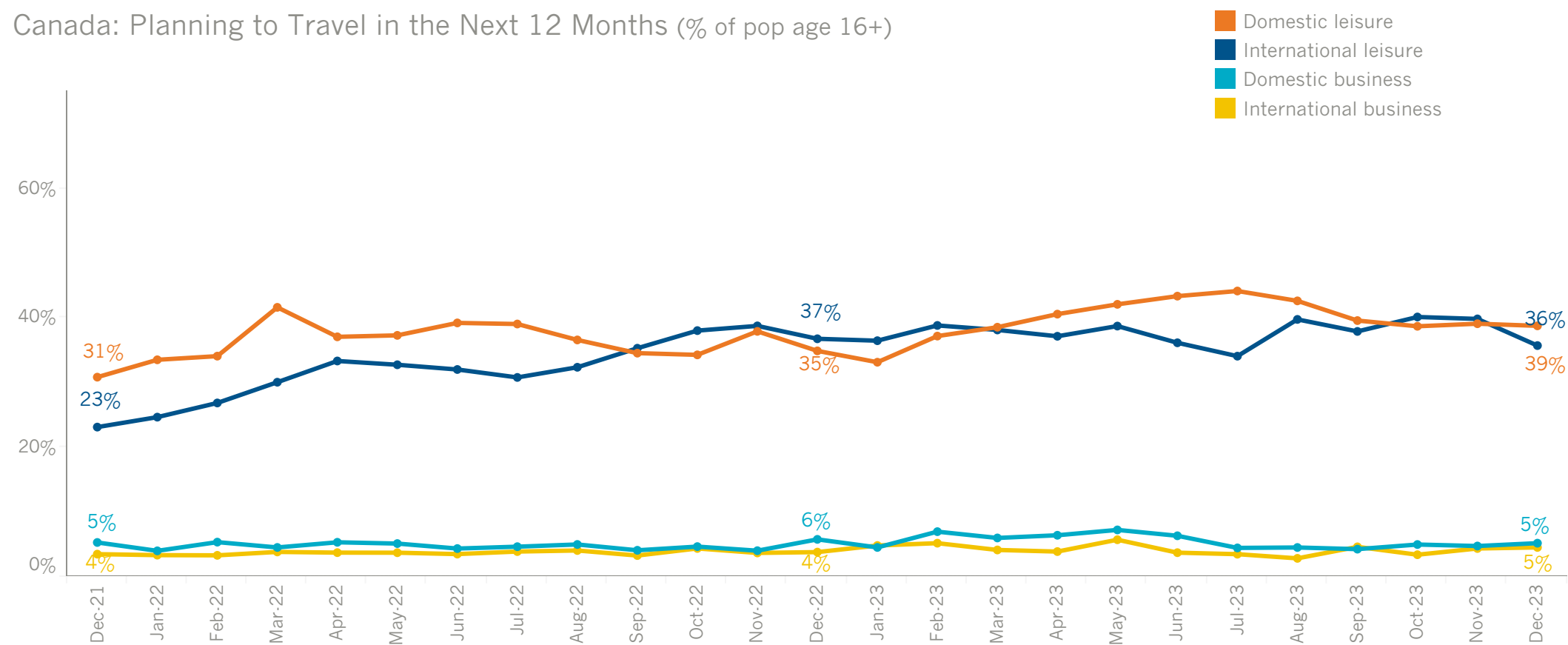
Data reported through: December 2023

Source: NTT/CIC Research

Travel Planned in Next 12 Months

The chart below shows the types of trips planned in the next 12 months for the focus market.

Canada: Planning to Travel in the Next 12 Months (% of pop age 16+)



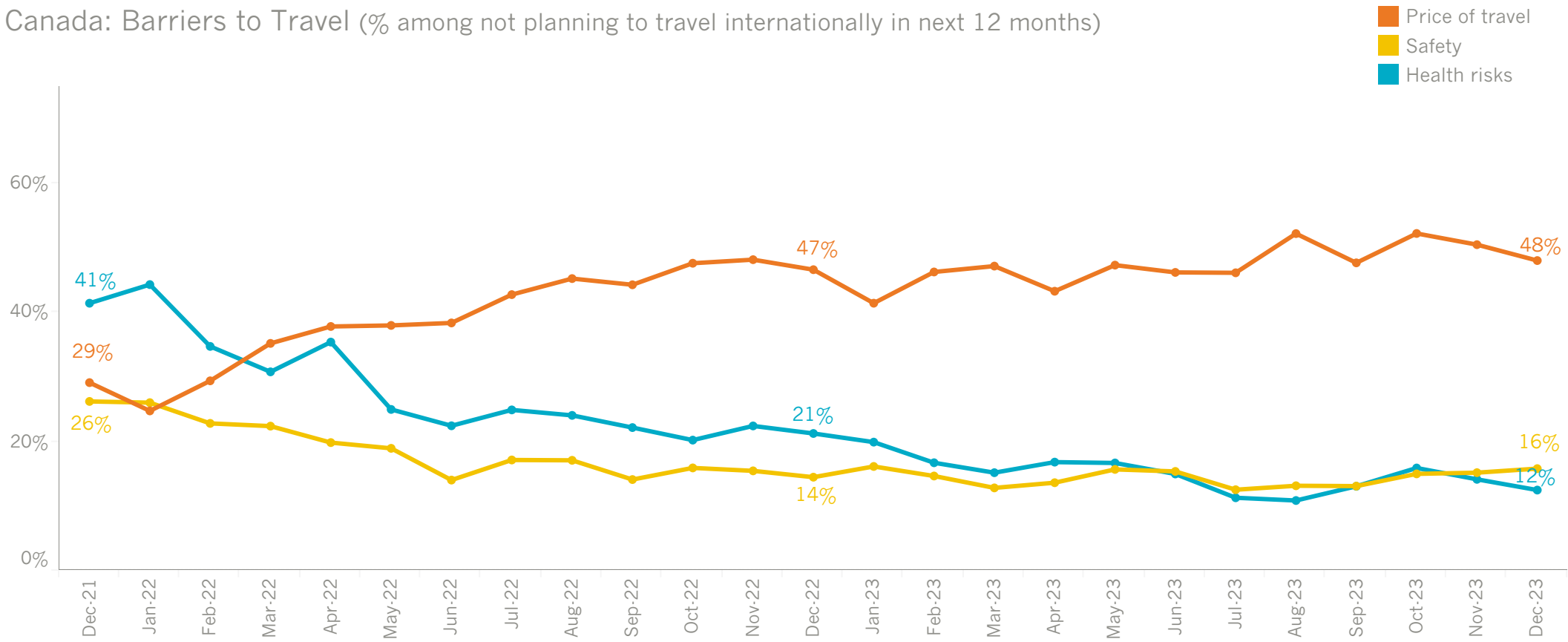
Q: Which, if any, of the following trips are you planning to take in the next 12 months?

Data reported through: December 2023

Source: YouGov

Barriers to Travel

The chart below shows perceived barriers to travel among consumers not currently planning an international trip in the focus market.



Q: Which, if any, of the below factors are currently preventing you from traveling?

Data reported through: December 2023

Source: YouGov



Audience Insights



Int'l leisure travelers
considering California
"CA Traveler Target"

Audience Profile

The chart shows the incidence of international leisure travelers in the focus market and the subset of international leisure travelers considering California as a destination.

The following audience profile is based on the survey responses over a 12-month period of those consumers considering California as a destination for international leisure travel.

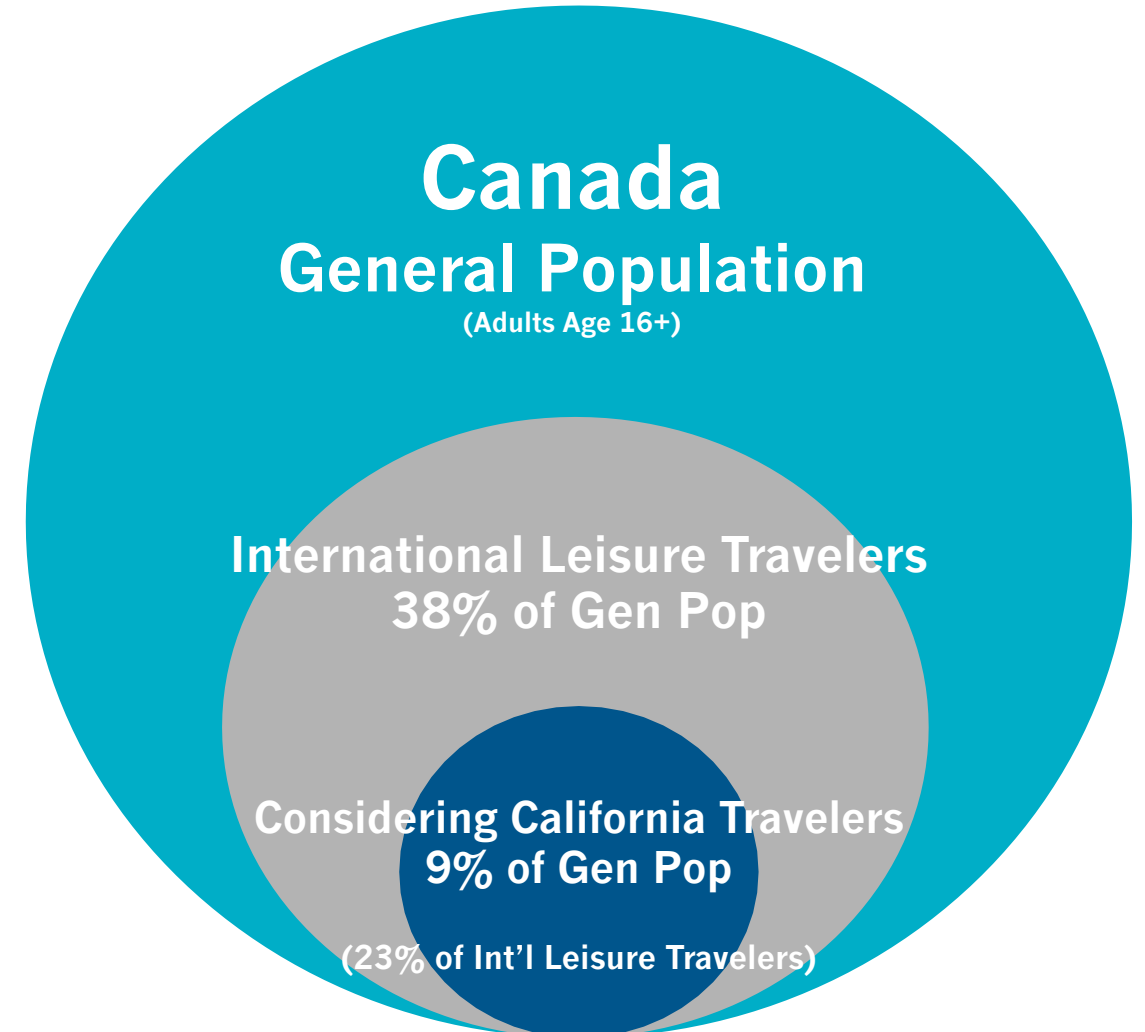
Definitions:

International Leisure Travelers:

Consumers in the focus market planning an international leisure trip in the next 12 months.

Considering California Travelers ("CA Traveler Target"):

Among the consumers in the focus market planning international leisure travel, those who are considering California as destination for travel in the next 12 months.



How to Read the Data

Generation		
	CA Traveler Target	Index
Gen Z	5%	59
Millennial	51%	115
Gen X	29%	124
Baby Boomer	13%	60

Generation Definitions:

- Gen Z (2000 and later)
- Millennial (1982-1999)
- Gen X (1965-1981)
- Boomer (1946-1964)

Data:

- **CA Traveler Target:** Shows the incidence (%) of the demographic characteristic or travel activity among international leisure travelers considering California as a destination in the focus market.
- **Index:** Compares the incidence (%) of the CA Traveler Target to the incidence (%) of all International Leisure Travelers. For example, an index of 115 indicates that the measure among the CA Traveler Target is 1.15x greater than among International Leisure Travelers in the focus market.



Int'l leisure travelers
considering California
"CA Traveler Target"

Demographic Profile

The chart below shows the demographic profile of the consumer target in the focus market.

Canada

Gender

	CA Traveler Target	Index
Female	51%	104
Male	49%	96

Marital Status

	CA Traveler Target	Index
Married	54%	97
Single	25%	111

Family Status

	CA Traveler Target	Index
Children <18	12%	130

Age

	CA Traveler Target	Index
Age 16-24	9%	89
Age 25-34	21%	111
Age 35-44	22%	128
Age 45-54	17%	105
Age 55+	32%	83

Generation

	CA Traveler Target	Index
Gen Z	7%	83
Millennial	38%	117
Gen X	30%	105
Baby Boomer	24%	83

Income*

	CA Traveler Target	Index
Higher income	34%	129
Middle income	46%	93
Lower income	13%	90
Prefer not to say	7%	73

Region

	CA Traveler Target	Index
Ontario	35%	90
British Columbia	20%	140
Quebec / Québec	20%	84
Alberta	11%	123
Manitoba	5%	124
Saskatchewan	3%	122
New Brunswick	1%	89
Nova Scotia	1%	49

*Income definitions: Higher >200% of median, Middle 75% to 200% of median, Lower <75% of median



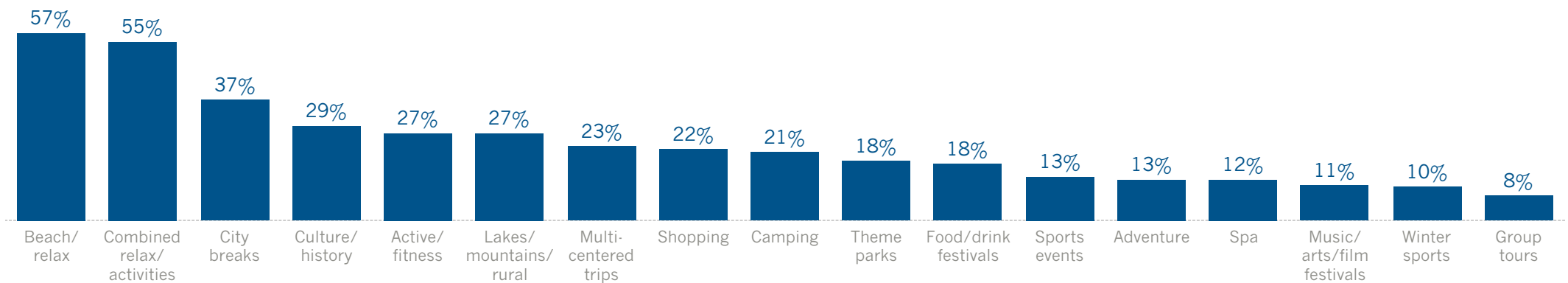
Int'l leisure travelers
considering California
"CA Traveler Target"

Trip Preferences/Characteristics

The chart below shows the typical trip preferences & characteristics of the consumer target in the focus market.

Canada

Trip Type



Traveler Type

	CA Traveler Target	Index
Budget	43%	107
All-inclusive	16%	93
Adventurous	11%	102
Responsible	9%	85
Luxury	9%	104

Travel Party (from most recent vacation)

	CA Traveler Target	Index
My partner	62%	106
My children	30%	122
Other family	22%	114
Friend(s)	21%	100
Solo	8%	82
Other person(s)	3%	119

Q Trip Type: Which of the following types of holidays do you typically take?

Q Traveler Type: Which of the following best describes the type of traveler you are?

Q Travel Party: Thinking about your most recent holiday, which of the following best describes the group or individual you went on holiday with?

Source: YouGov (2023)



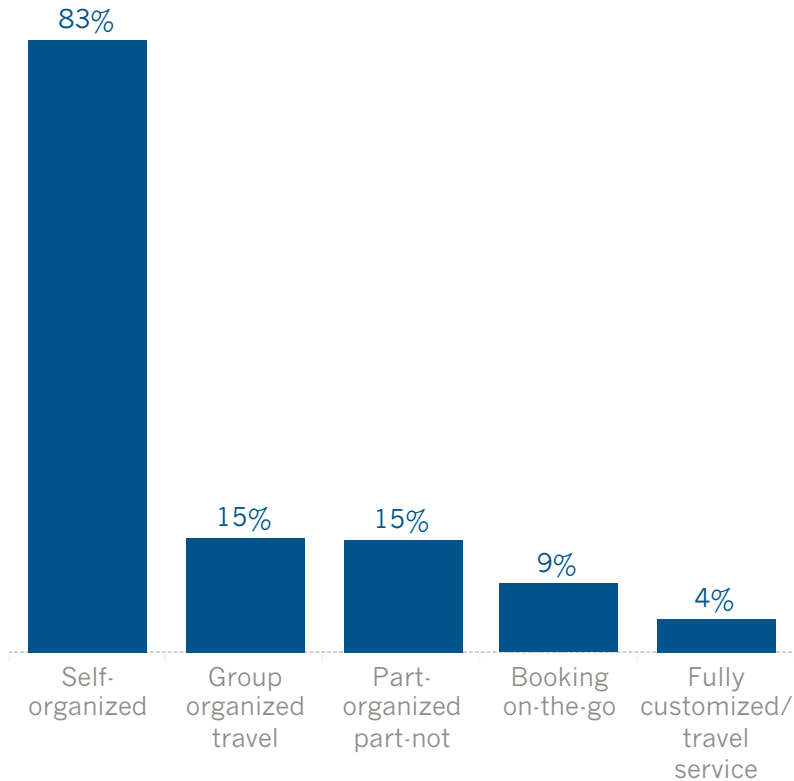
Int'l leisure travelers
considering California
"CA Traveler Target"

Organizing/Planning Methods

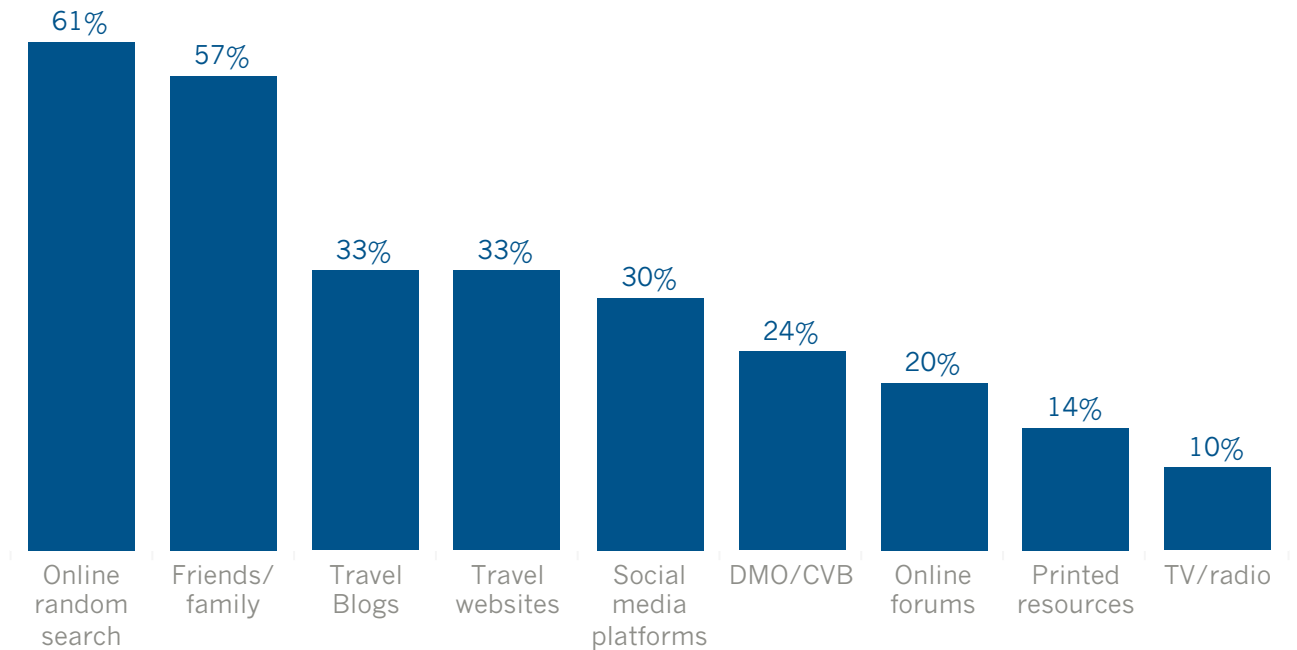
The chart below shows the organizing and planning methods of of the consumer target in the focus market.

Canada

Organizing Travel



Planning Methods



Q Organizing: Which of the following describe how you generally organize your holidays?
Q Planning: Which of the following methods do you generally use to help plan a holiday?

Source: YouGov (2023)

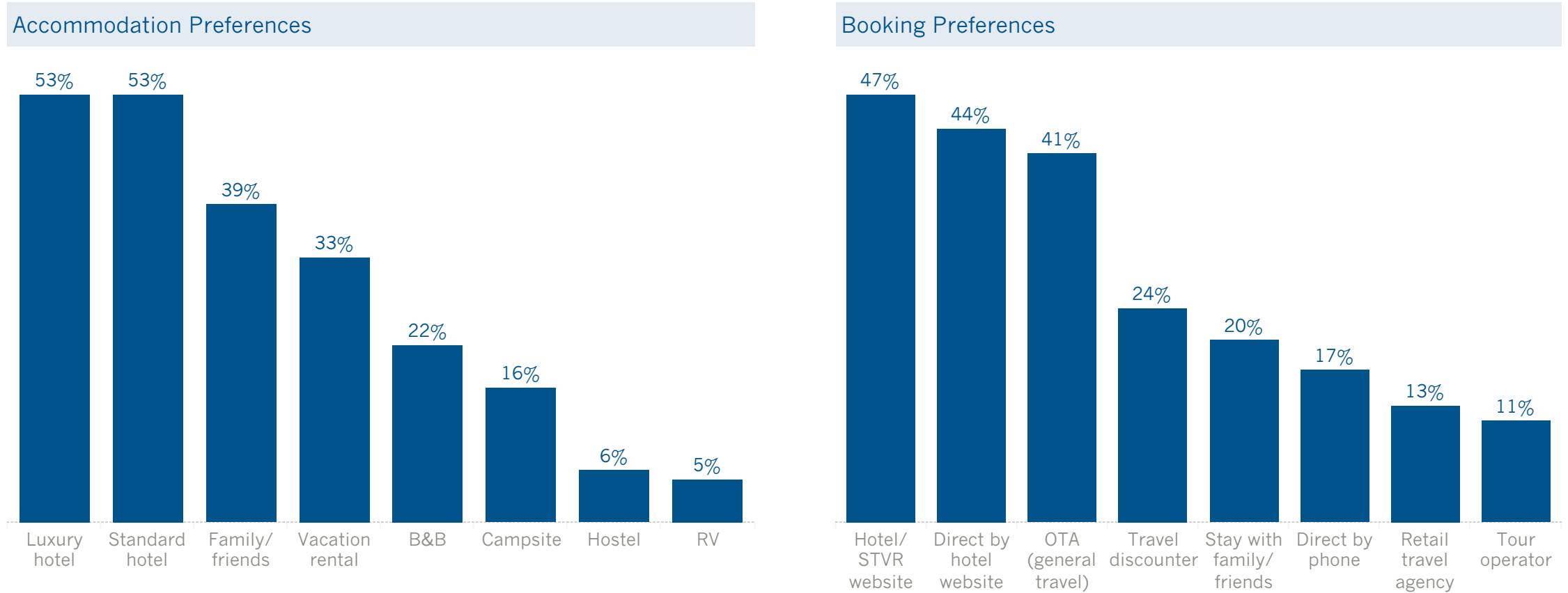


Int'l leisure travelers
considering California
"CA Traveler Target"

Booking Preferences

The chart below shows the accommodation preferences of of the consumer target in the focus market.

Canada



Q Accommodation: Which of the following types of accommodations do you typically stay in when you are on holiday?
Q Booking: Which of the following booking methods do you typically use when booking accommodations for the holidays?

Source: YouGov (2023)



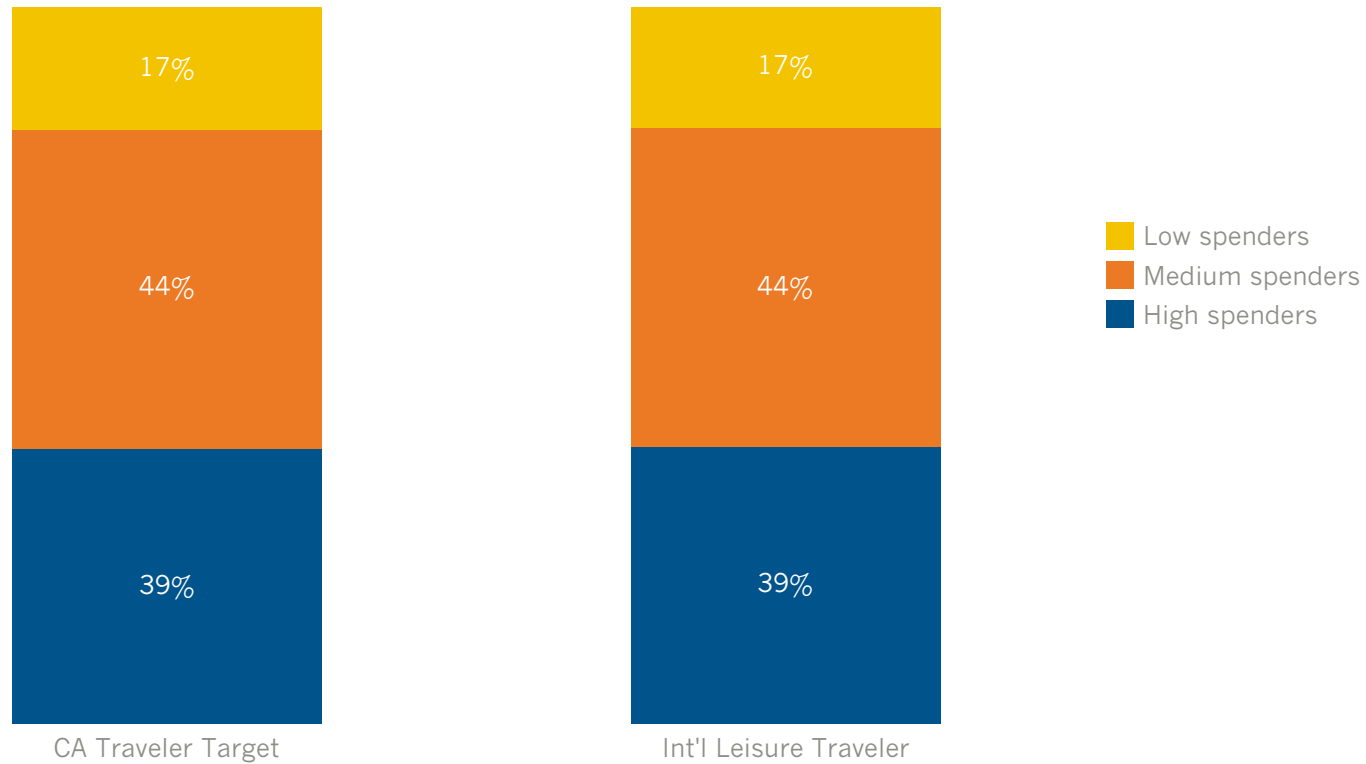
Int'l leisure travelers
considering California
"CA Traveler Target"

Travel Spending

The chart shows the travel spending of the consumer target in the focus market based on the most recent vacation.

Canada

Travel Spending (from most recent vacation)





Int'l leisure travelers
considering California
"CA Traveler Target"

Media & Advertising

The data shows advertising influences and sports preferences of the target consumer in the focus market.

Canada

Advertising Influences

	CA Traveler Target	Index
Social media	55%	125
Travel websites	46%	110
Online streaming services	34%	141
TV - Free to view channels	32%	130
Radio	22%	135
Direct mail	20%	99
Billboards	19%	111
Podcast	18%	156
TV - paid/subscription	18%	155
Magazines (digital)	18%	105
Public transport	17%	141
Cinema	16%	112
National newspaper (digital)	14%	134
Local newspaper (digital)	13%	104
Magazines (physical)	13%	118
Local newspaper (physical)	13%	110
National newspaper (physical)	10%	129

Sports Watched/Followed

	CA Traveler Target	Index
Ice Hockey	42%	119
Basketball	27%	119
NFL	27%	118
Baseball	27%	127
Soccer/Football	22%	111
Tennis	22%	121
Golf	16%	120
Swimming	13%	125
Boxing	10%	103
Volleyball	9%	126
Athletics/Track & Field	9%	118
Gymnastics	8%	108
Cycling	8%	118
Running/Marathon	6%	132
Horse Racing	6%	145
Cricket	5%	102
Surfing	4%	180
Rugby League	3%	154
Australian Rules Football	3%	167

Q Advertising: Thinking about your next travel or holiday related purchase,...where would you advertise to catch your attention?

Q Sports: Which of the following sports do you watch or follow?

Source: YouGov (2023)

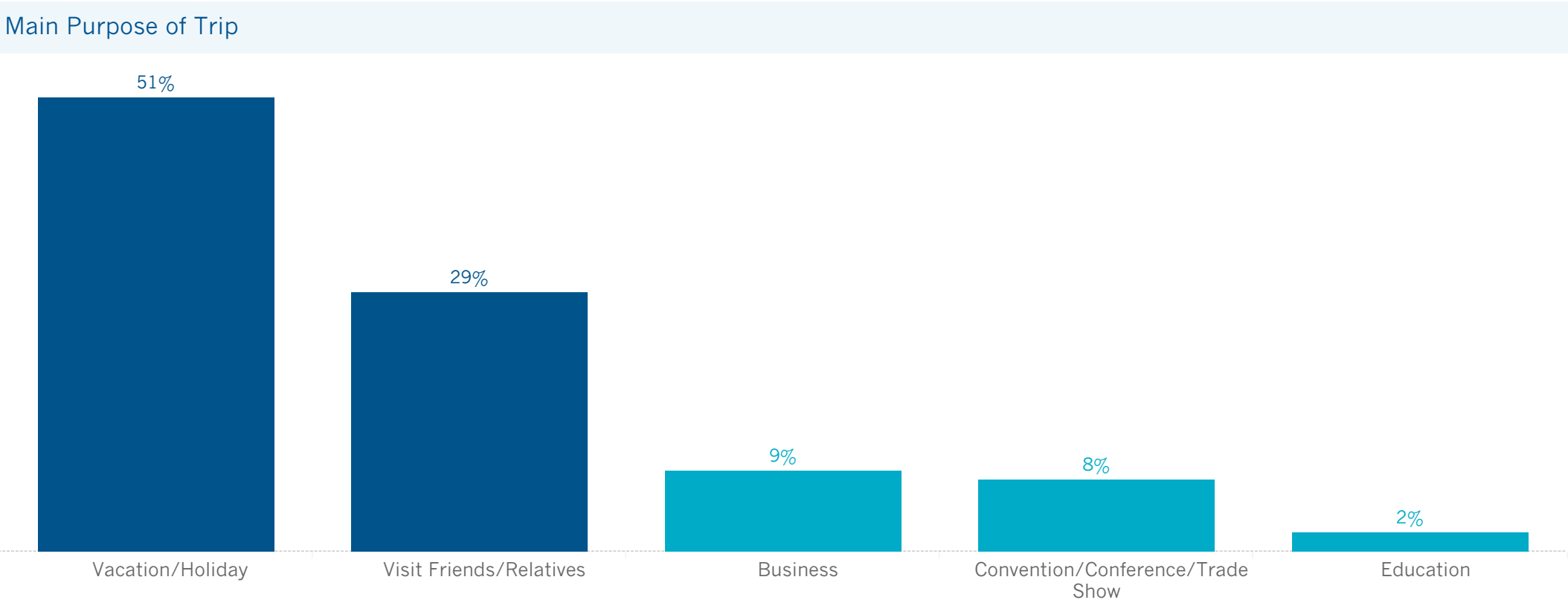


California Travelers & California Trip Characteristics

Main Purpose of Trip

The chart below shows the main purpose of the trip among travelers in the focus market.

Canada Air



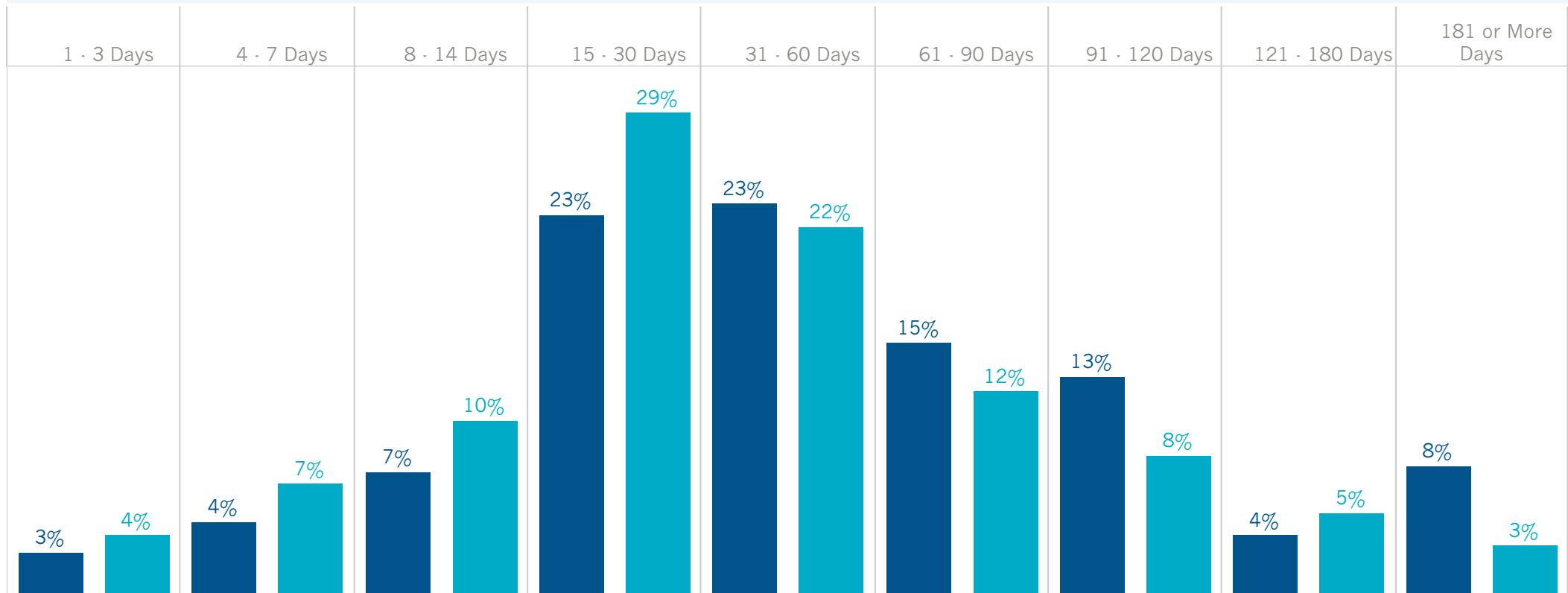


Decision Making vs Reservations

The chart below shows the timeframe for making the decision to travel and making the reservations among travelers in the focus market..

Canada

Decision Making vs Reservations



■ How many days prior to departure did you make the decision to travel?
■ How many days prior to departure did you make air travel reservations?

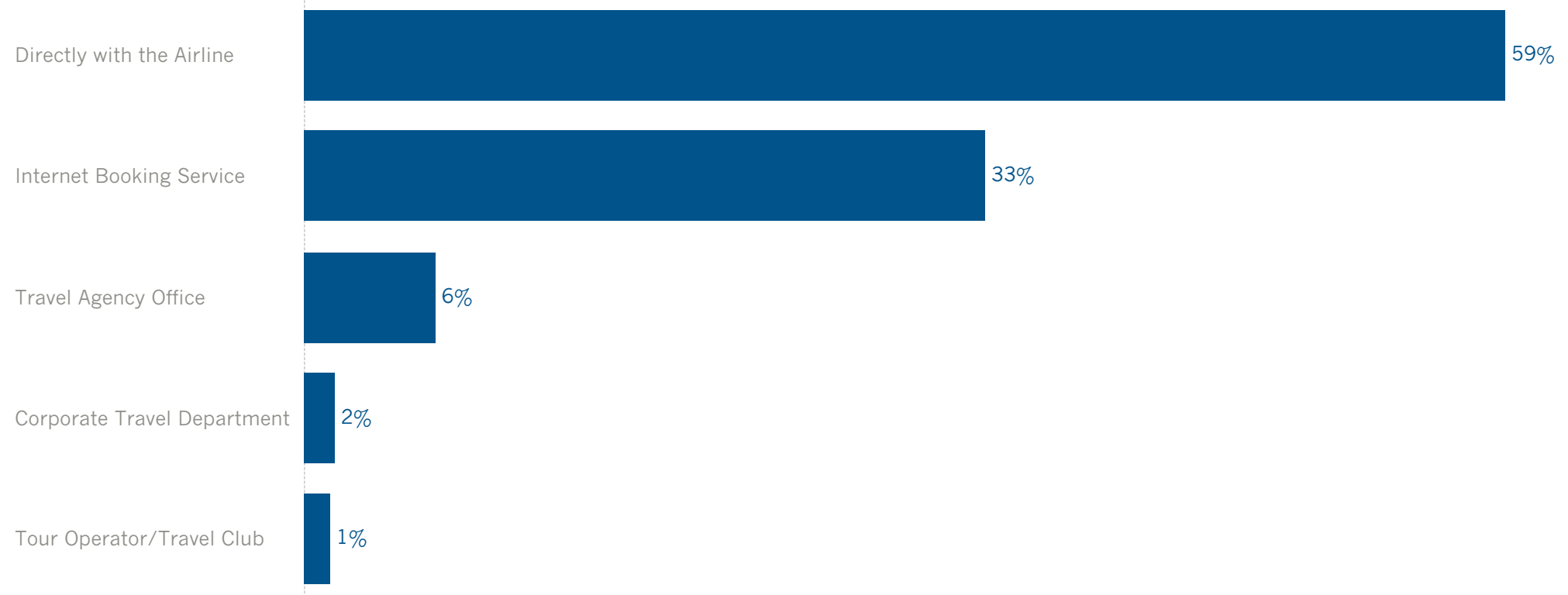


Airline Reservations

The chart below shows how airline reservations were made for the trip among travelers in the focus market.

Canada

Airline Reservations





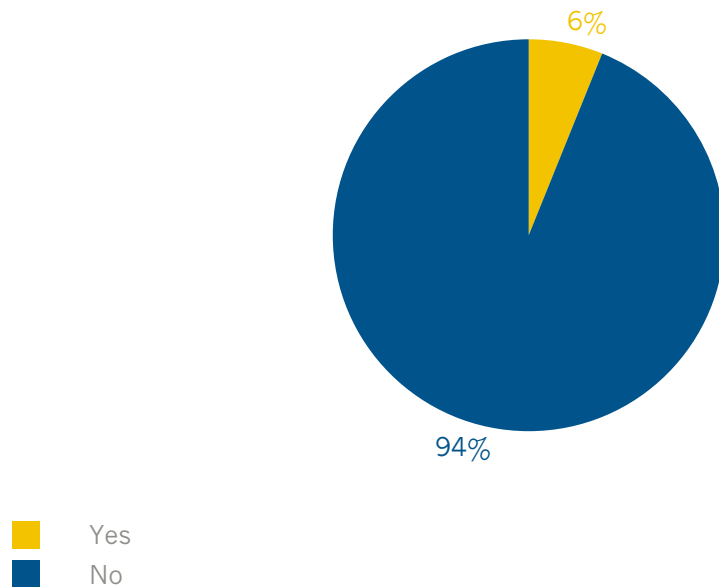
Leisure travelers

First/Repeat Visitation, Travel Party Size

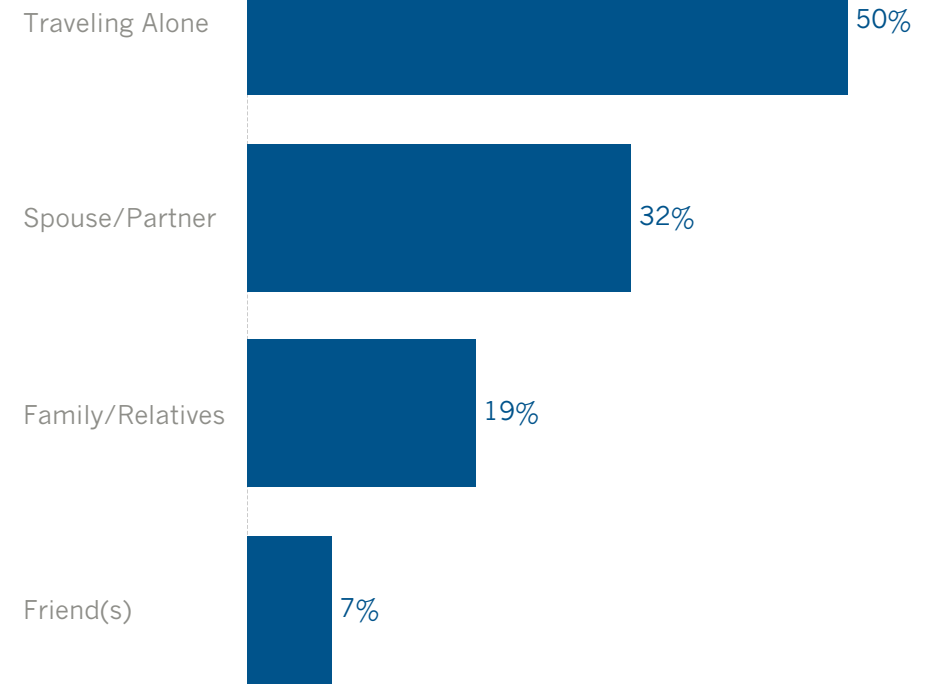
The charts below show first-time and repeat visitation and travel party size among travelers from the focus market.

Canada

First trip to the US



Travel Companion



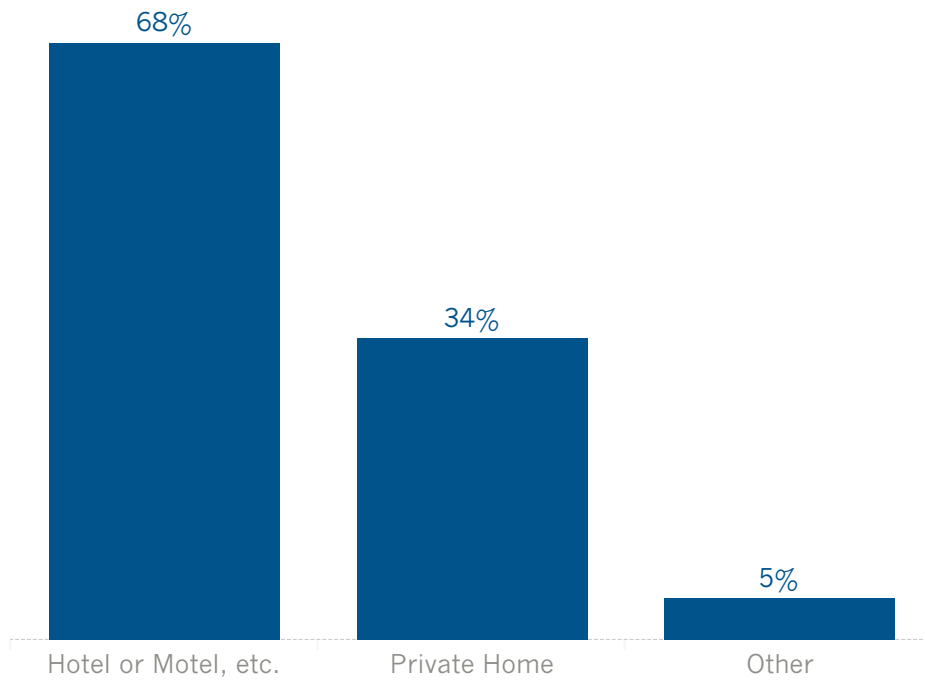


Types of Accommodations & Nights

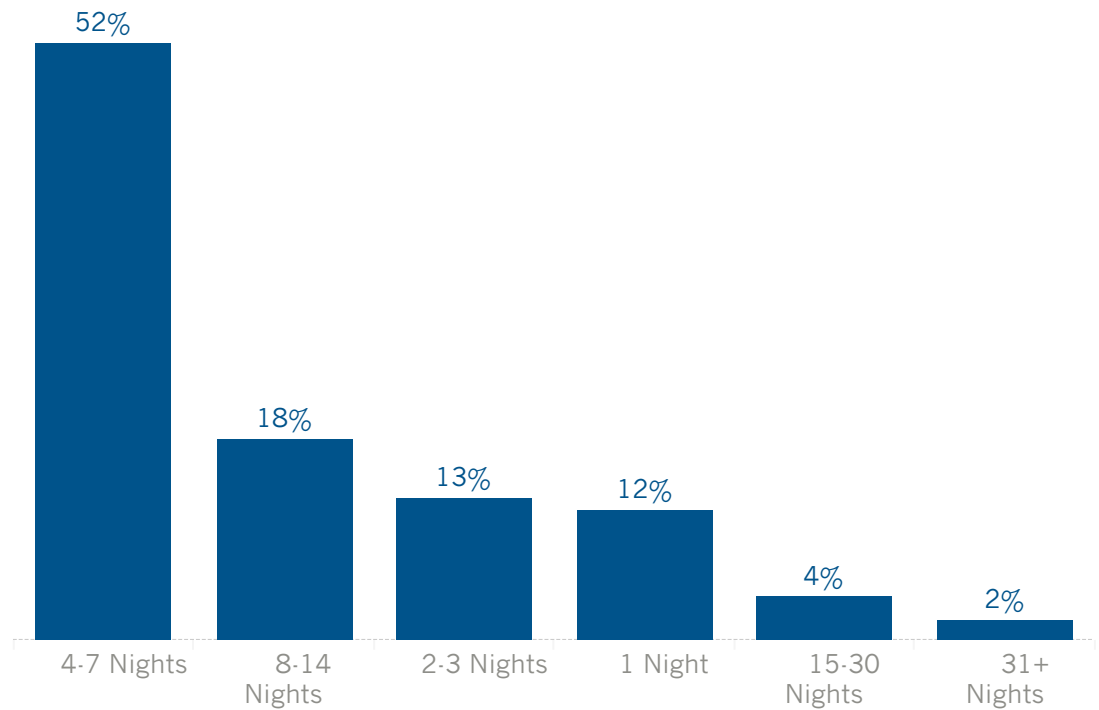
The charts below show types of accommodations stayed in and number of nights in destination among travelers from the focus market.

Canada

Types of Accommodations



Nights in Destination



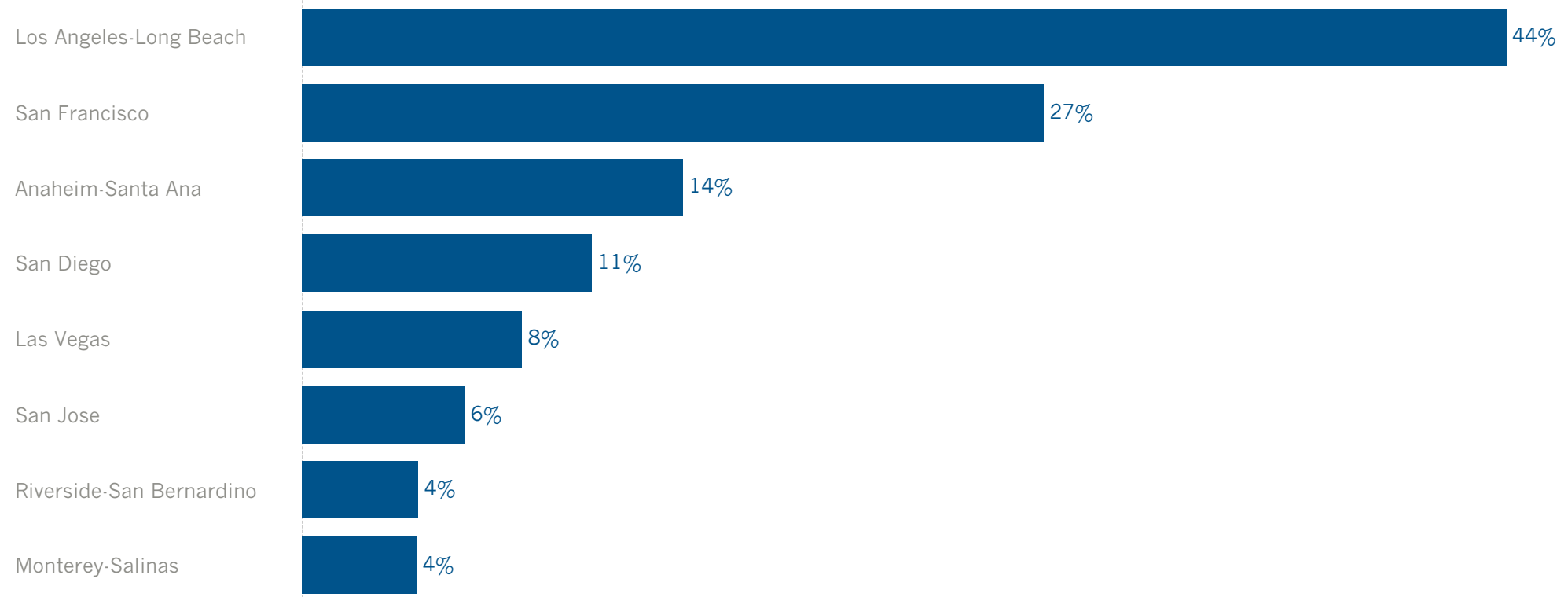


Destinations Visited

The chart below shows the U.S. destinations visited on a trip among travelers from the focus market.

Canada

US Destinations visited

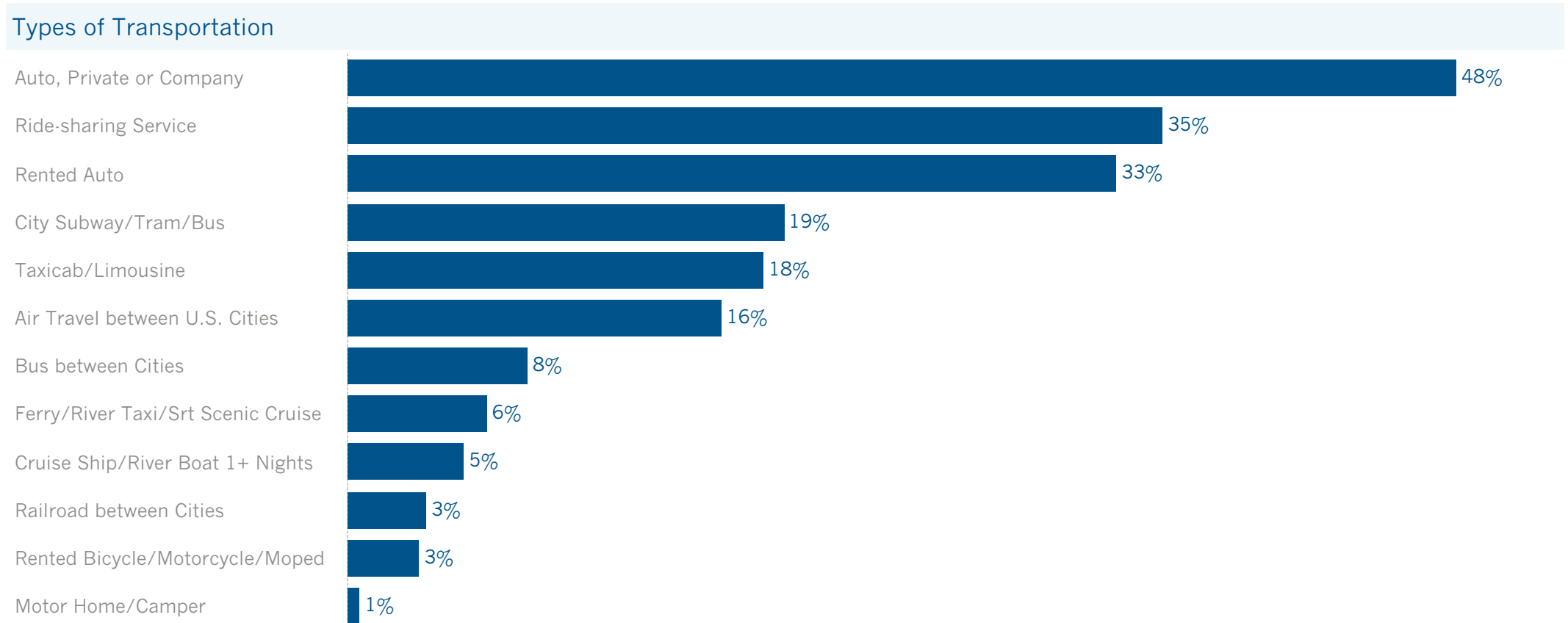




Transportation

The chart below shows the types of transportation used on the trip among travelers in the focus market.

Canada



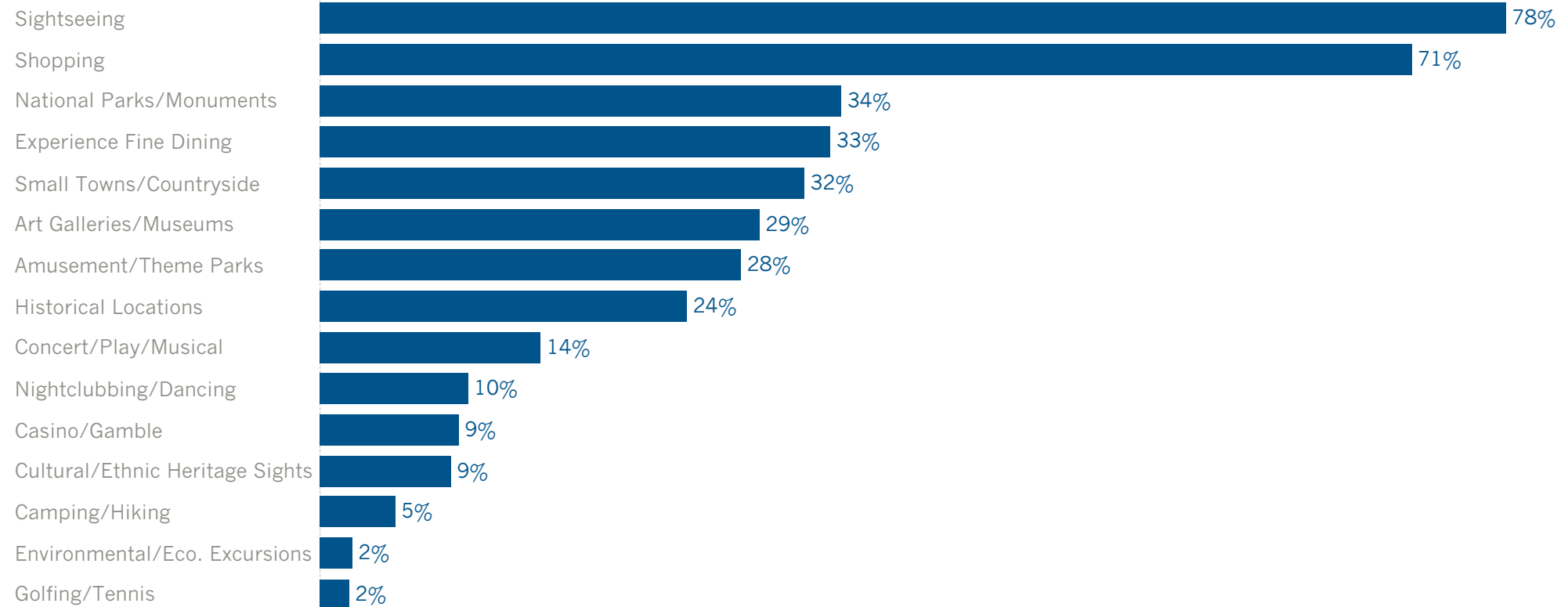


Activities

The chart below shows the leisure activities engaged in on a U.S. trip among travelers to California from the focus market.

Canada

Leisure Activities





Expenditures in the US

The chart below shows mean expenditures by category among travelers to California from the focus market.

Canada

Expenditures per visitor

