

Global Market Profile

FRANCE



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).

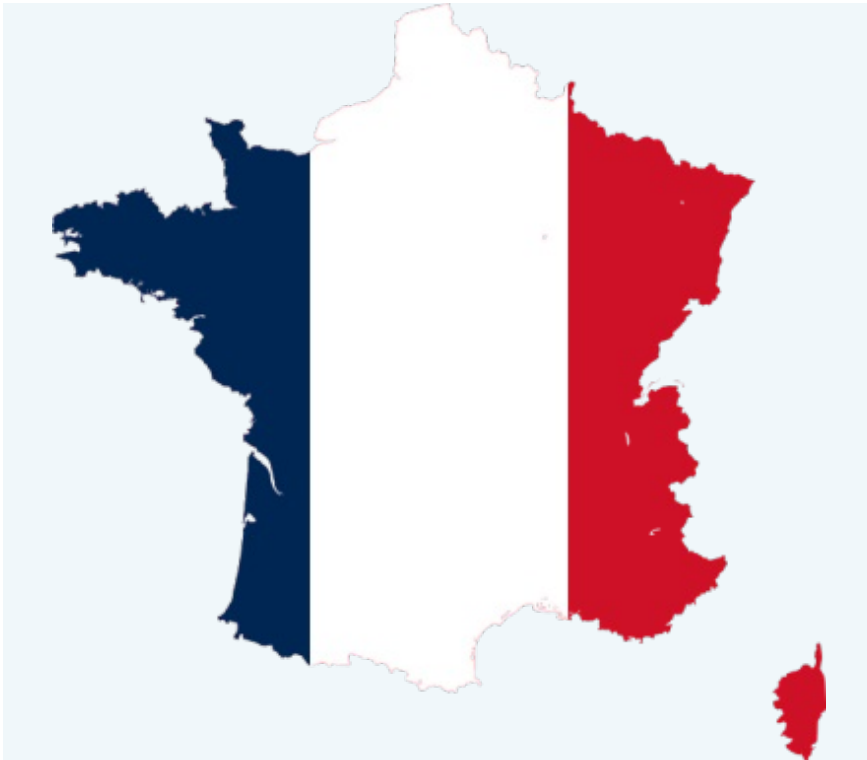
*Profile targets for China and Japan include travelers considering California and/or other U.S. destinations due to sample size limitations.



Market Landscape

Country Profile

France



POPULATION: *

64.8M

EXCHANGE RATE: **

Local currency to USD dollar

0.9

GROSS DOMESTIC PRODUCT (GDP):

Annual % chg ***

0.7%

INFLATION RATE:

Annual % chg ****

5.0%

* www.worldometers.info, 2023

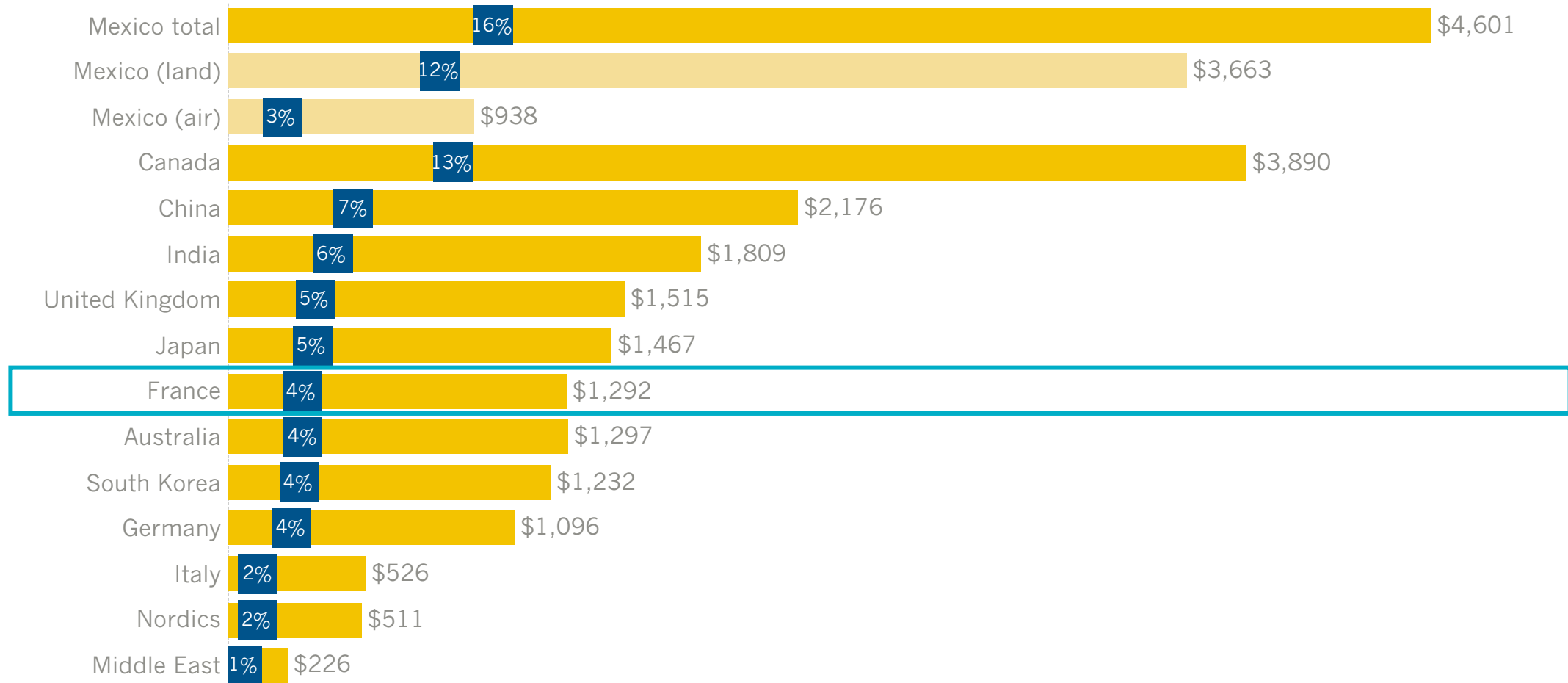
** www.x-rates.com, Feb 2024

*** www.imf.org, 2023

**** www.imf.org, 2023

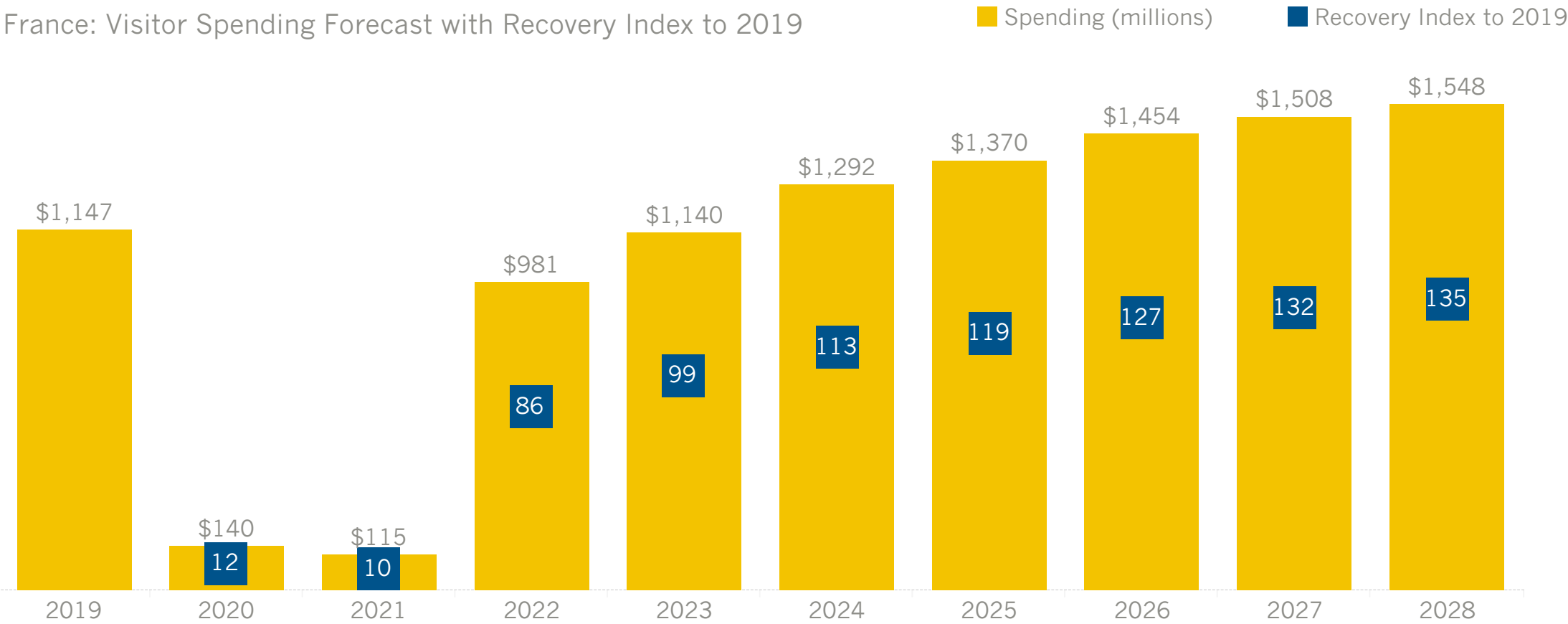
Forecast: Visitor Spending by Market (2024)

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.



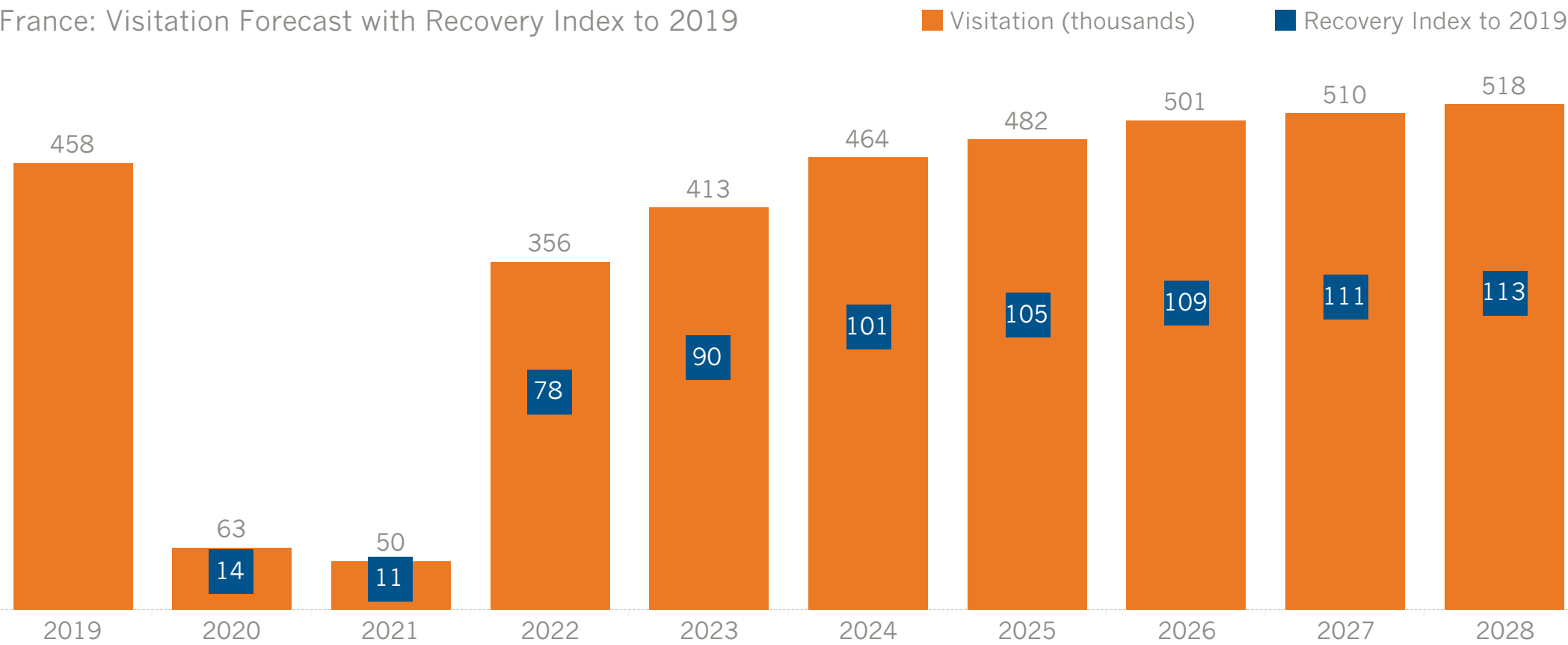
Forecast: Visitor Spending

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



Forecast: Visitor Volume

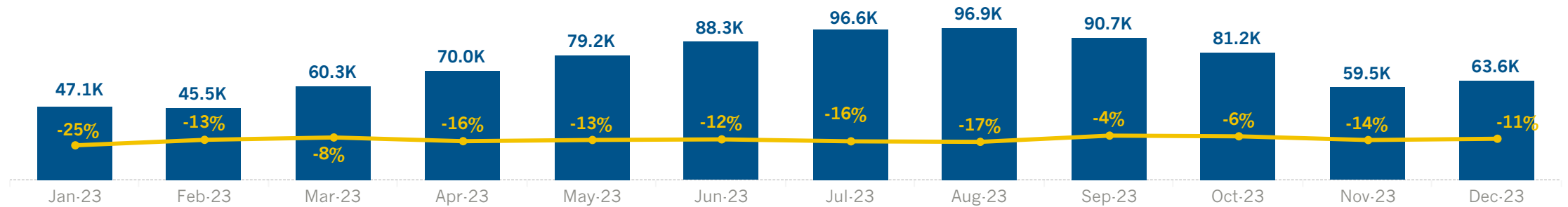
The chart below shows the state’s visitation forecast and recovery index for the focus market.



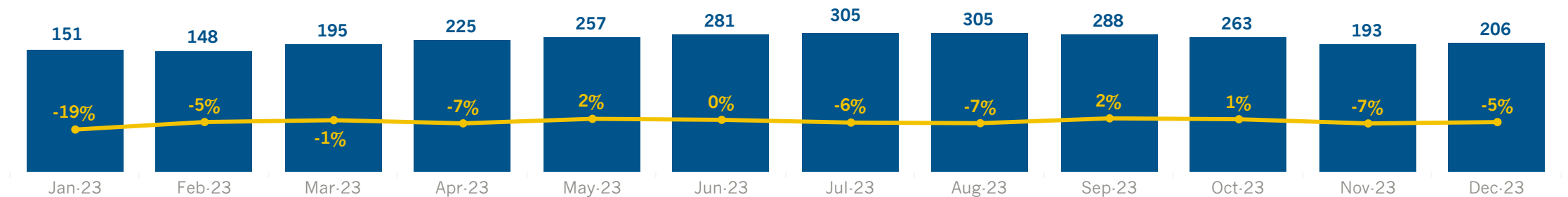
Airlift to California

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

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



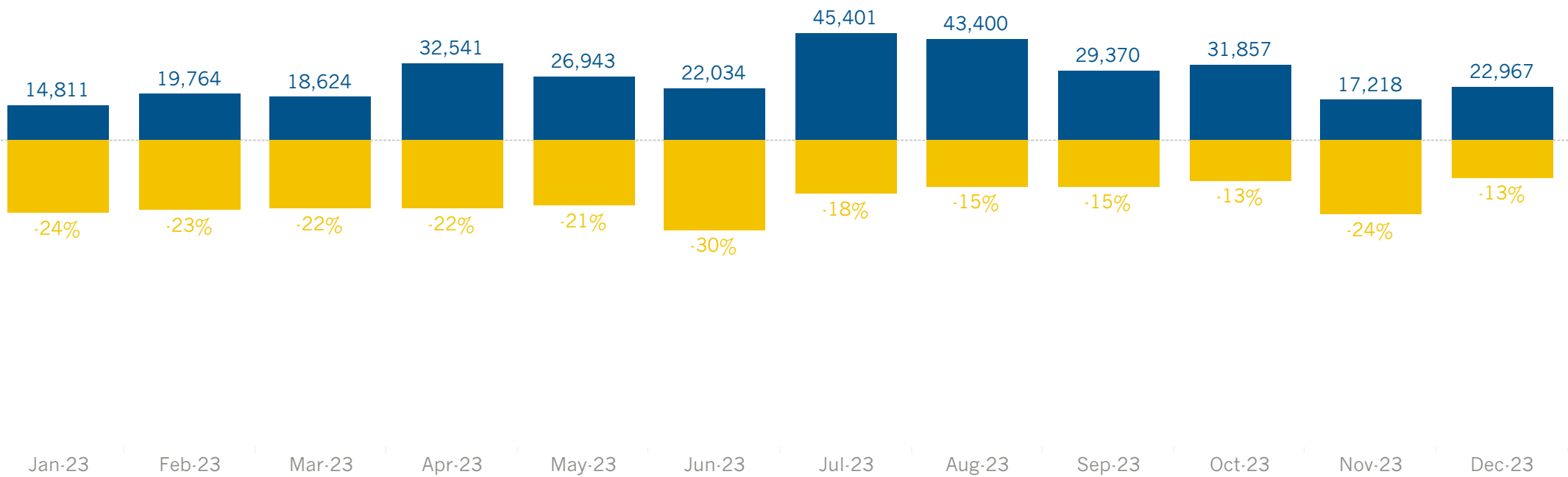
France: Non-Stop Flights to CA (% chg vs 2019)



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.

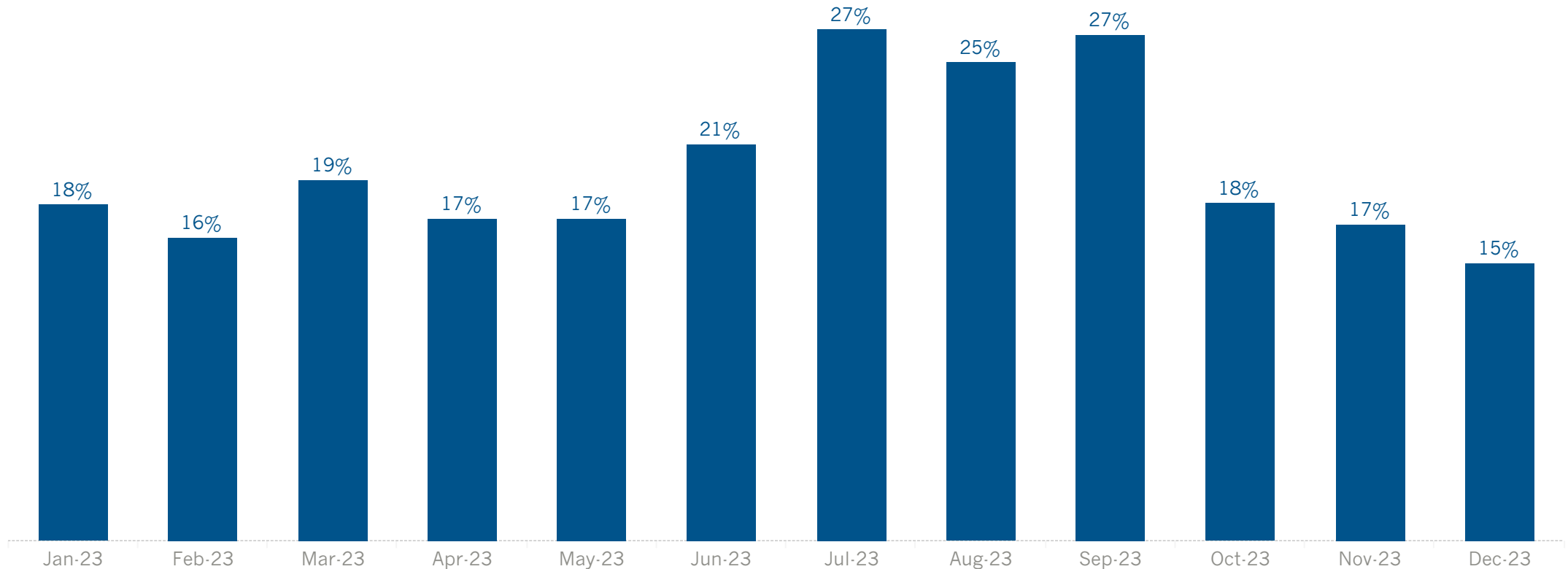
France: Non-Resident Arrivals at CA Ports of Entry (% change vs. 2019)



California's Share of Arrivals

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

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



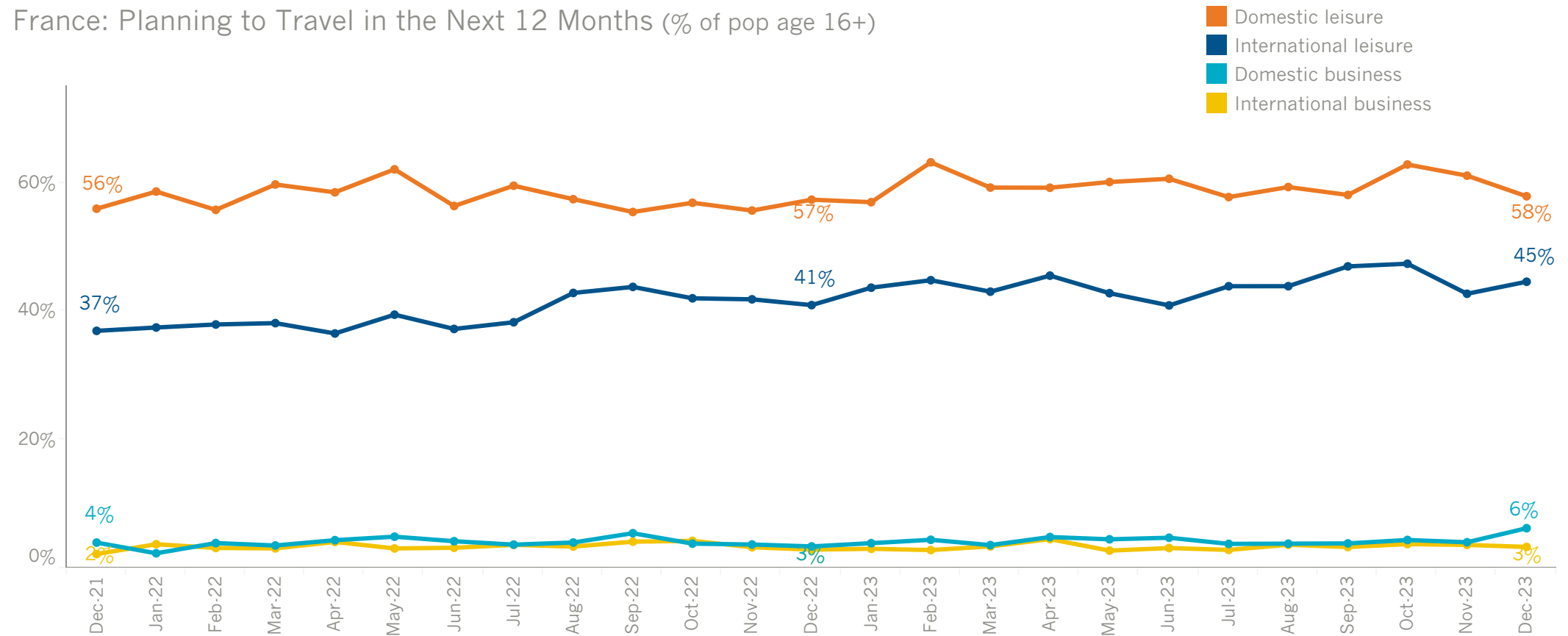
Data reported through: December 2023

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.

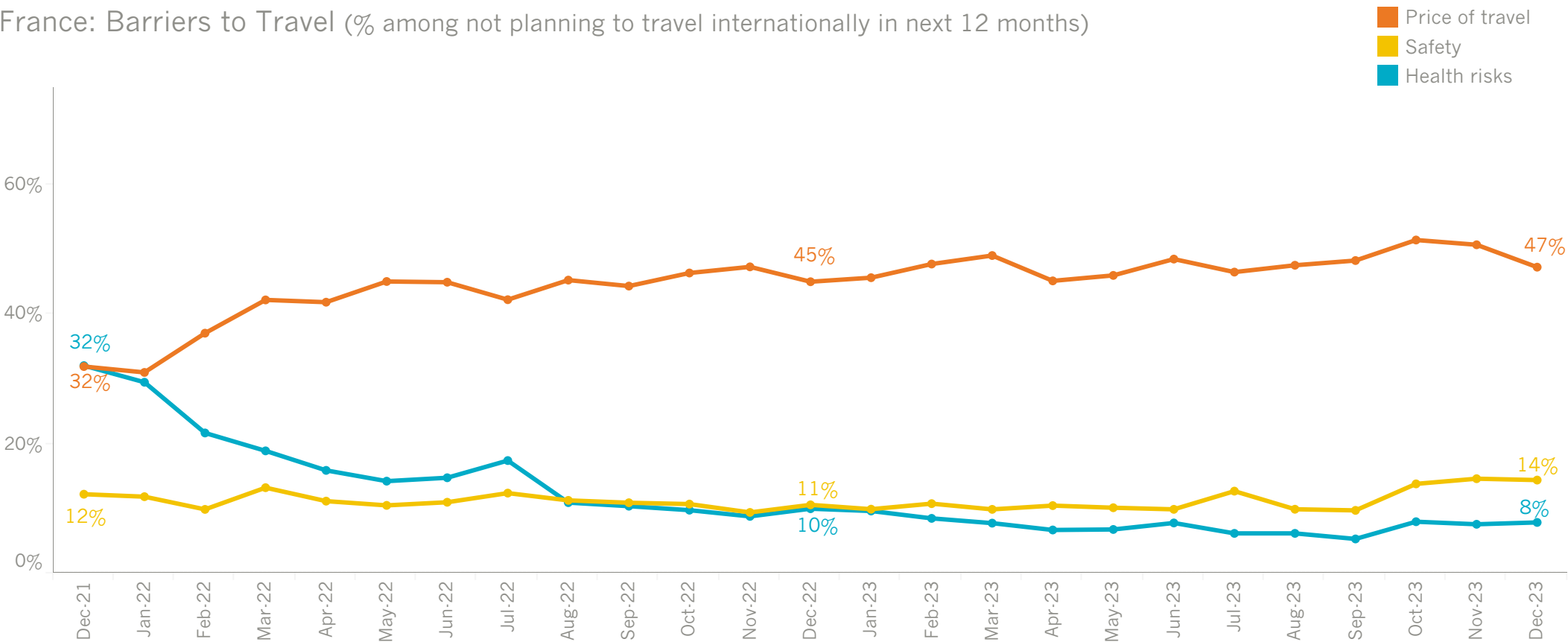
France: Planning to Travel in the Next 12 Months (% of pop age 16+)



Barriers to Travel

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

France: Barriers to Travel (% among not planning to travel internationally in next 12 months)



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.

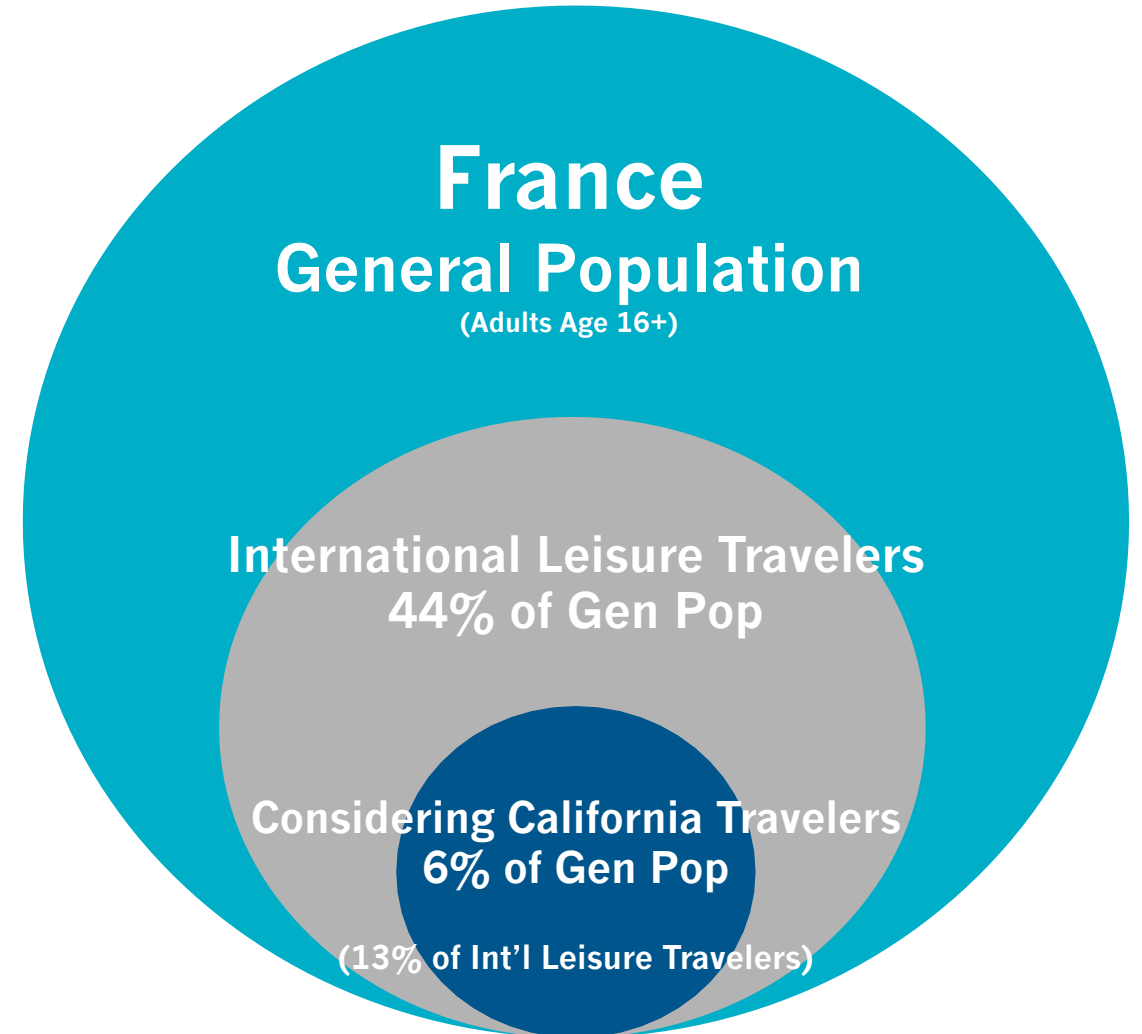
Definitions:

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.

France

Gender

	CA Traveler Target	Index
Female	50%	100
Male	50%	100

Marital Status

	CA Traveler Target	Index
Married	38%	96
Single	27%	128
Civil partnership	8%	99

Family Status

	CA Traveler Target	Index
Children <18	28%	98

Age

	CA Traveler Target	Index
Age 16-24	13%	109
Age 25-34	20%	112
Age 35-44	16%	97
Age 45-54	20%	117
Age 55+	31%	85

Generation

	CA Traveler Target	Index
Gen Z	11%	105
Millennial	34%	109
Gen X	32%	111
Baby Boomer	23%	80

Income*

	CA Traveler Target	Index
Higher income	20%	130
Middle income	51%	95
Lower income	16%	91
Prefer not to say	13%	98

Region

	CA Traveler Target	Index
Region Parisienne	32%	136
Sud-Est	24%	94
Nord-Est	20%	94
Nord-Ouest	16%	88
Sud-Ouest	8%	70

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



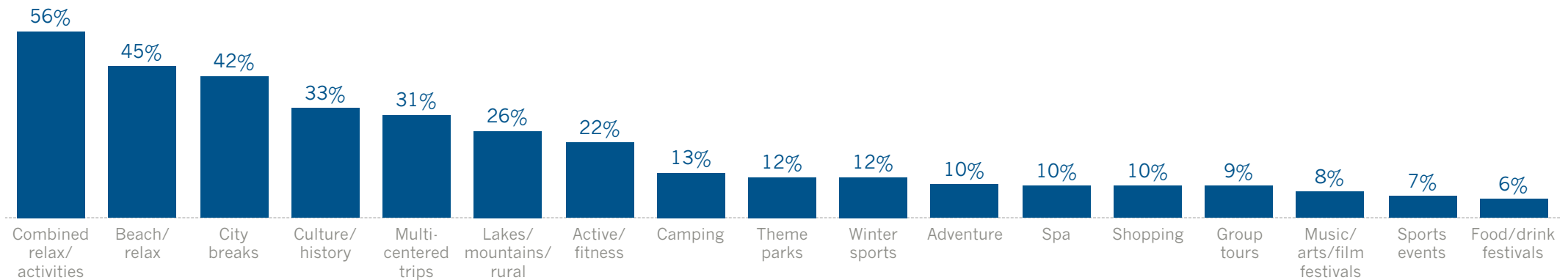
Int'l leisure travelers
considering California
"CA Traveler Target"

Trip Preferences/Characteristics

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

France

Trip Type



Traveler Type

	CA Traveler Target	Index
Budget	44%	99
Adventurous	13%	108
Responsible	13%	110
All-inclusive	11%	109
Luxury	6%	92

Travel Party (from most recent vacation)

	CA Traveler Target	Index
My partner	65%	97
My children	36%	99
Friend(s)	25%	126
Other family	19%	103
Solo	6%	111
Other person(s)	3%	112

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)



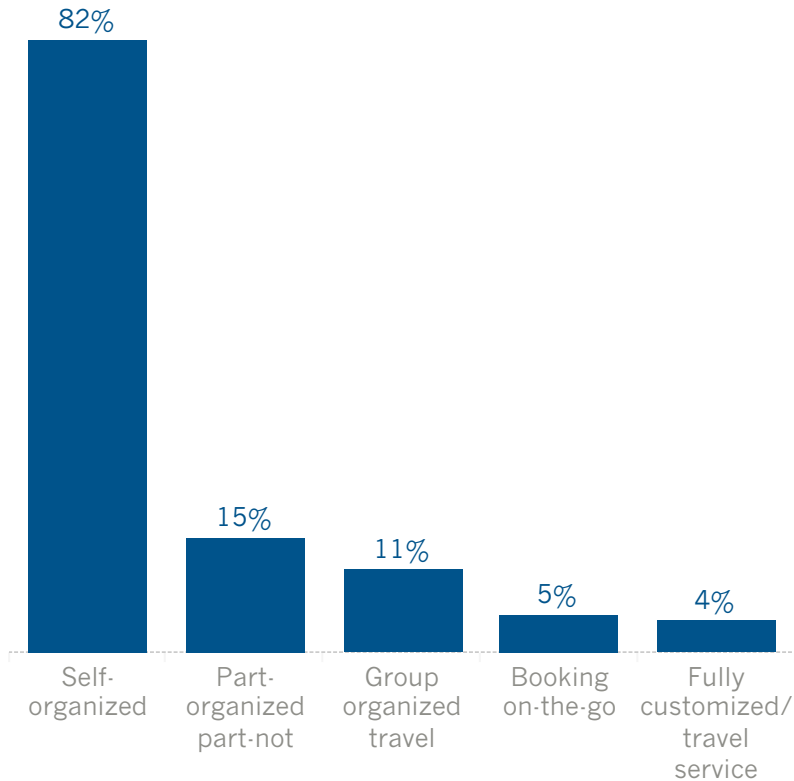
Int'l leisure travelers
considering California
"CA Traveler Target"

Organizing/Planning Methods

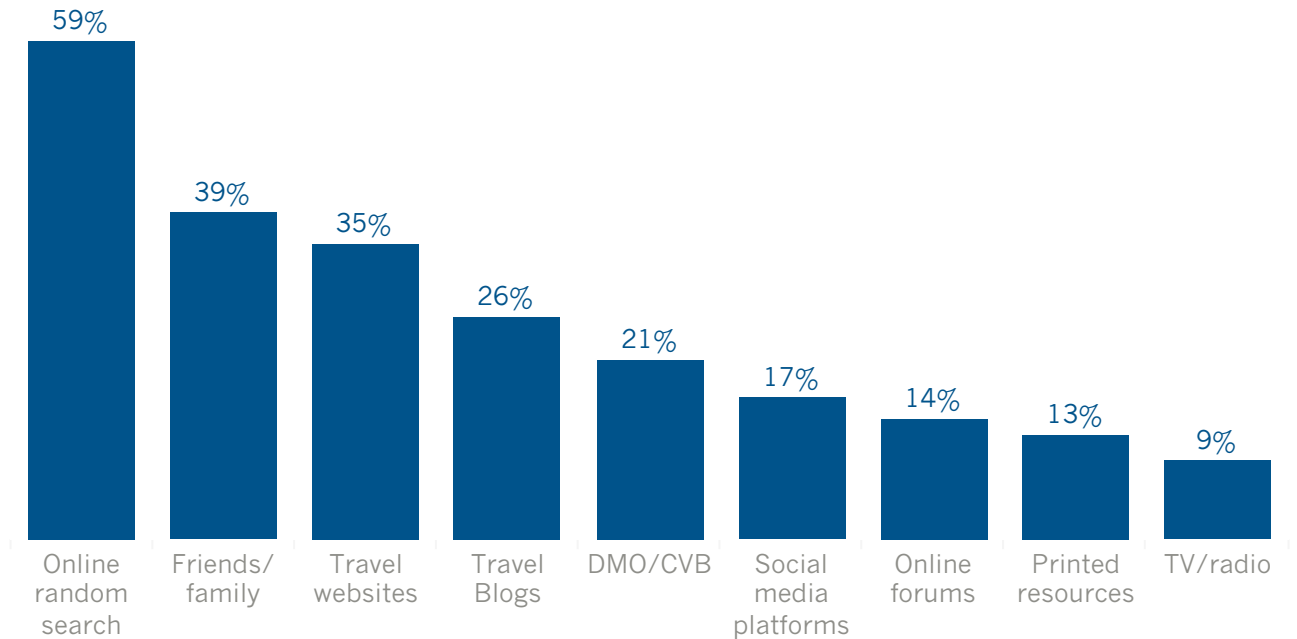
The chart below shows the organizing and planning methods of of the consumer target in the focus market.

France

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)

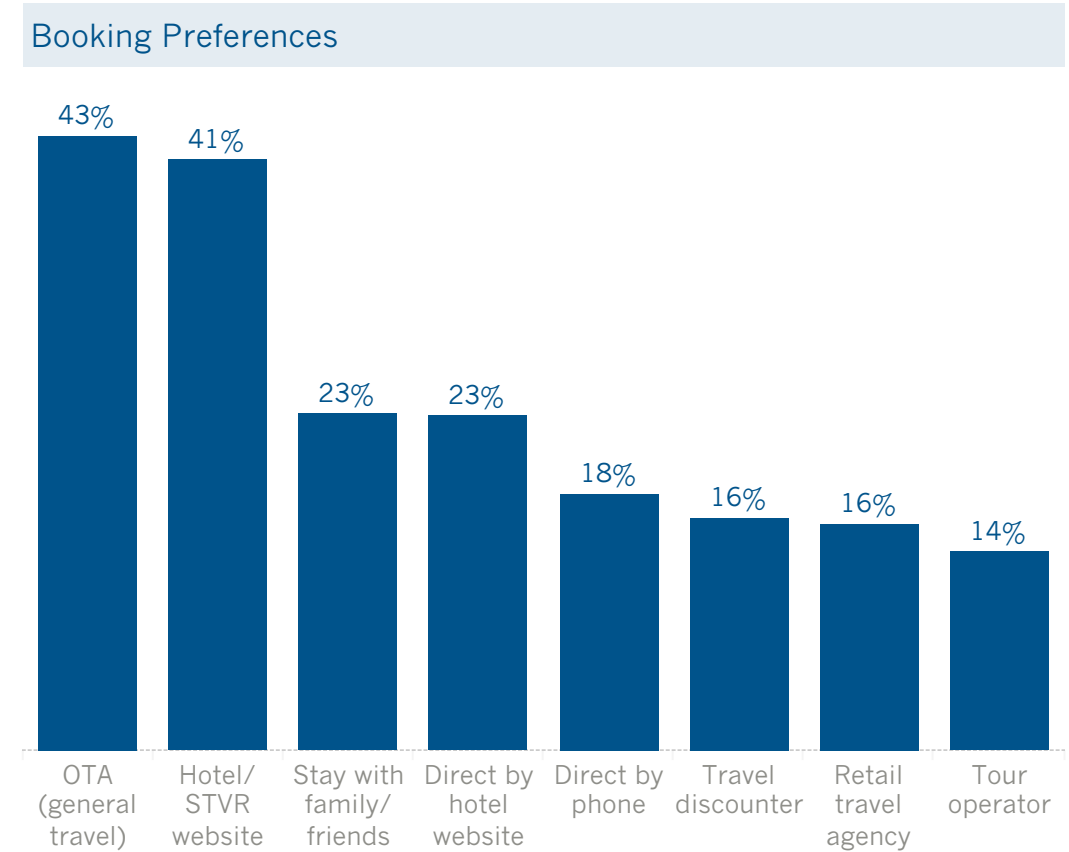
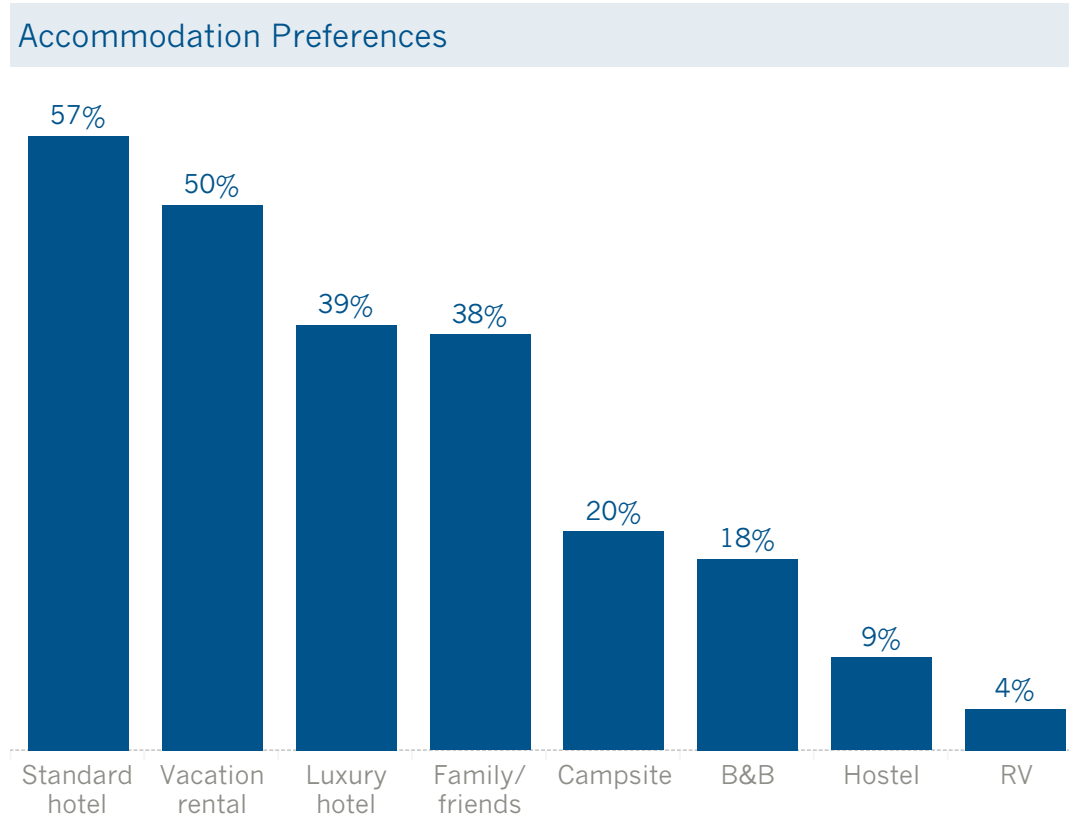


Int'l leisure travelers
considering California
"CA Traveler Target"

Booking Preferences

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

France





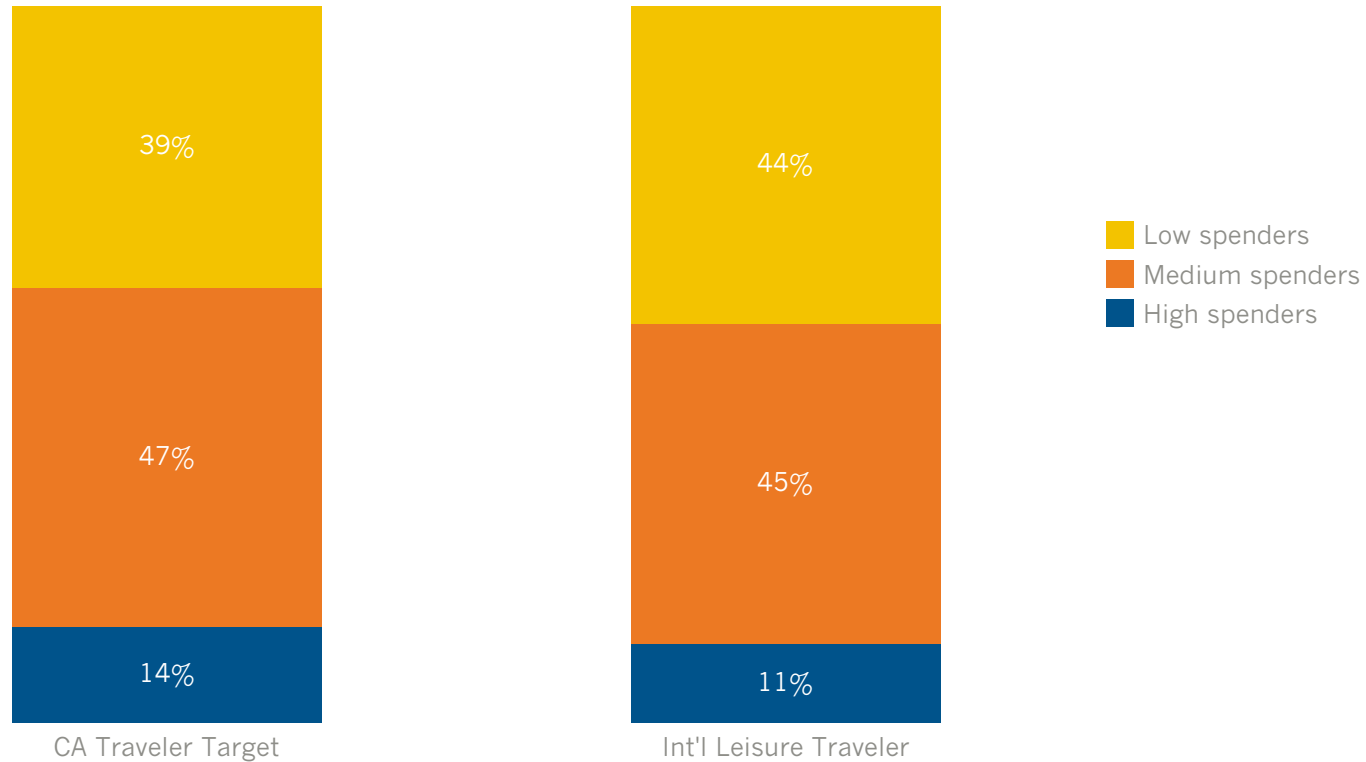
Int'l leisure travelers
considering California
"CA Traveler Target"

Travel Spending

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

France

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.

France

Advertising Influences

	CA Traveler Target	Index
Travel websites	47%	108
Social media	47%	116
TV - Free to view channels	39%	117
Billboards	38%	126
Cinema	25%	124
Public transport	22%	157
Radio	22%	117
Magazines (physical)	21%	118
Magazines (digital)	19%	100
Local newspaper (physical)	19%	119
Local newspaper (digital)	17%	118
National newspaper (digital)	16%	132
Online streaming services	16%	115
Direct mail	13%	112
National newspaper (physical)	12%	132
Podcast	11%	140
TV - paid/subscription	11%	105

Sports Watched/Followed

	CA Traveler Target	Index
Soccer/Football	31%	105
Tennis	27%	107
Athletics/Track & Field	22%	122
Swimming	18%	133
Cycling	17%	90
Basketball	14%	113
Boxing	12%	140
Gymnastics	11%	137
Running/Marathon	9%	132
Volleyball	8%	136
Rugby League	7%	149
NFL	7%	178
Ice Hockey	6%	184
Golf	4%	114
Baseball	4%	190
Surfing	4%	149
Horse Racing	3%	103
Australian Rules Football	3%	242
Cricket	1%	158

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)

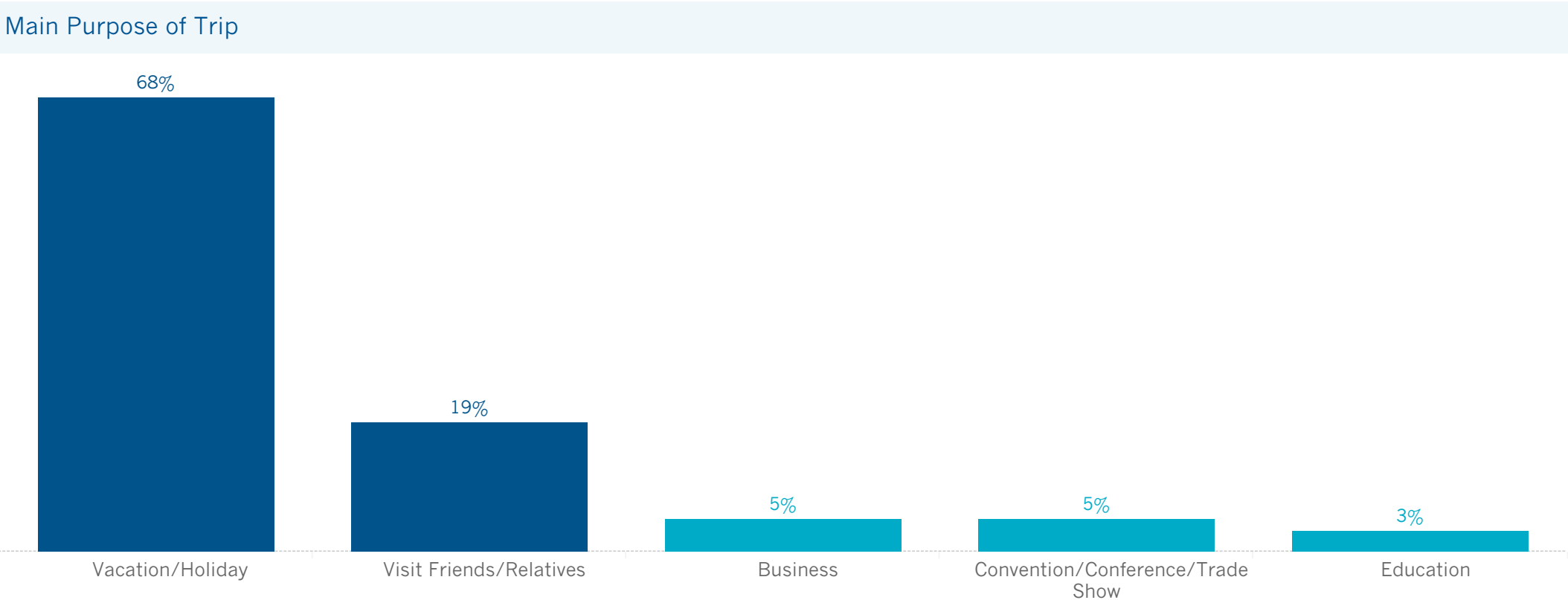


California Travelers & California Trip Characteristics

Main Purpose of Trip

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

France



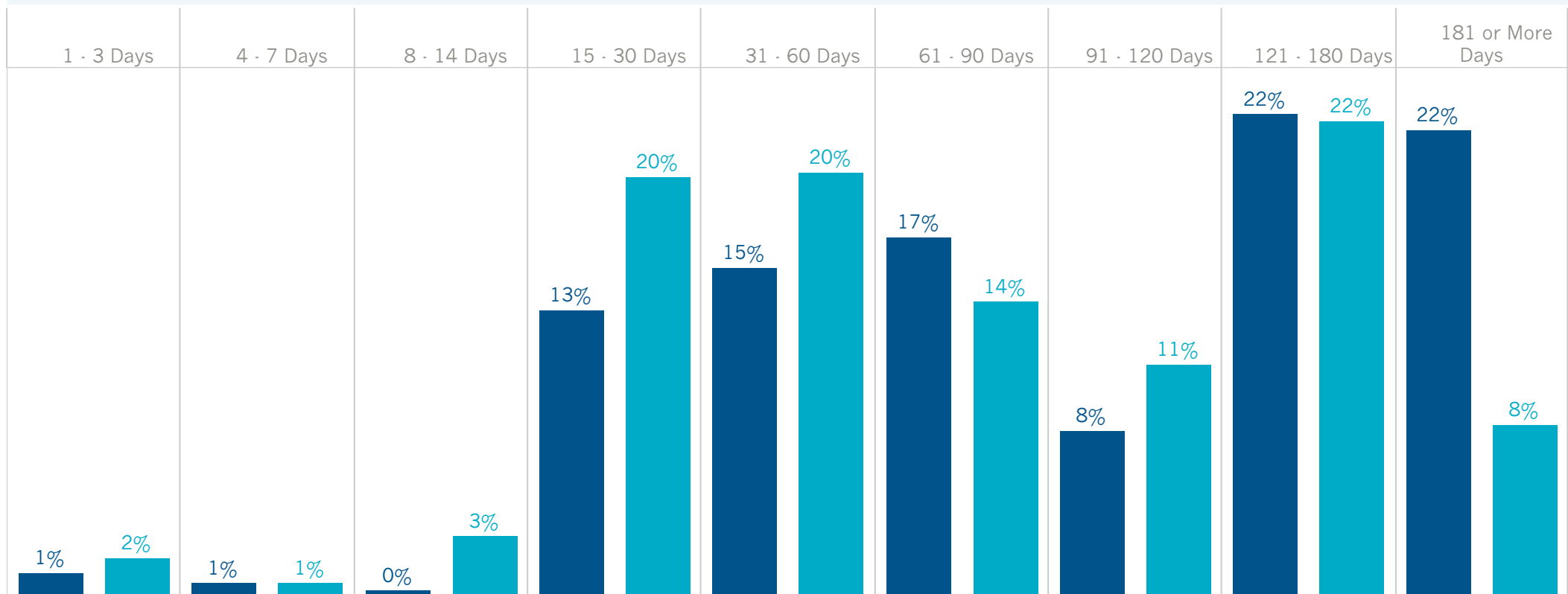


Decision Making vs Reservations

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

France

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?

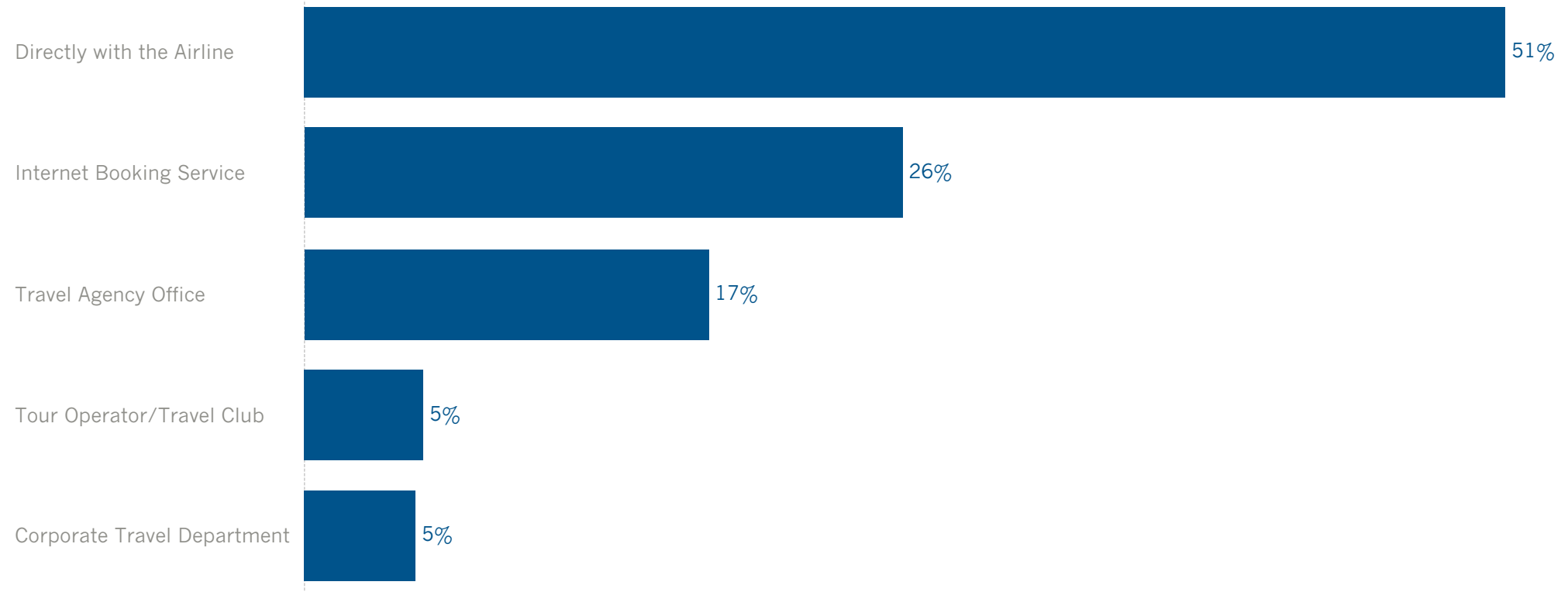


Airline Reservations

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

France

Airline Reservations





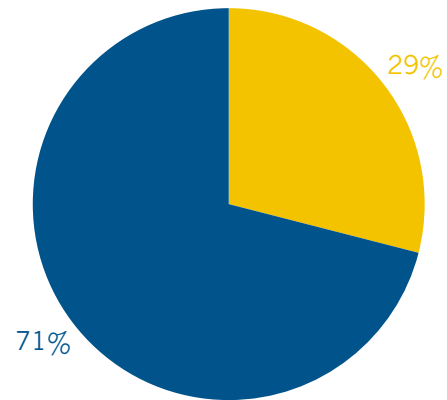
Leisure travelers

First/Repeat Visitation, Travel Party Size

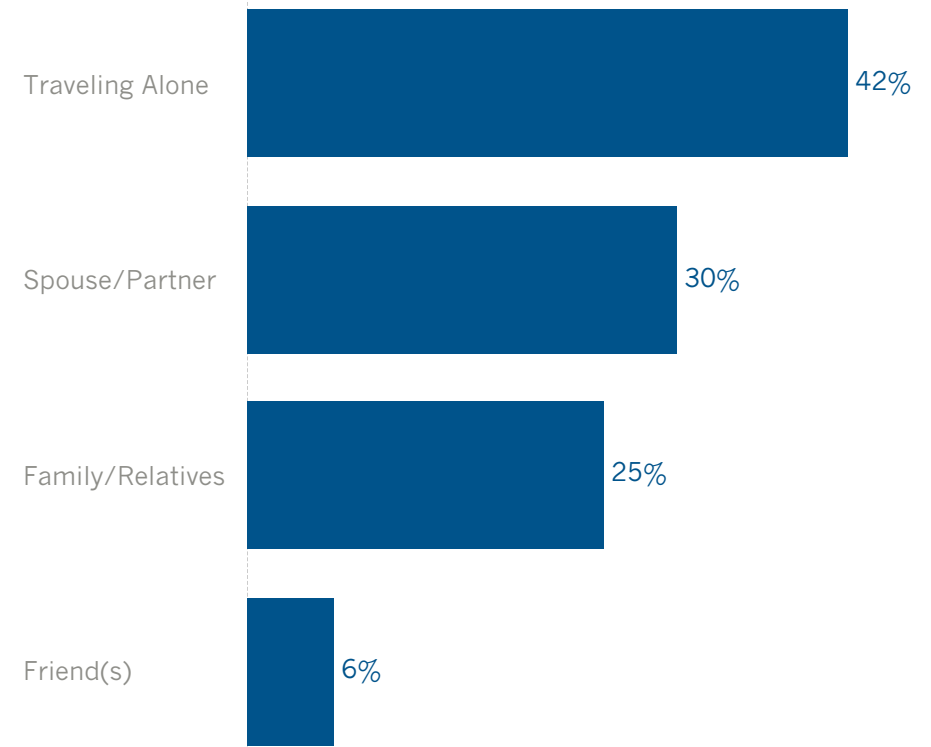
The charts below show first-time and repeat visitation and travel party size among travelers from the focus market.

France

First trip to the US



Travel Companion



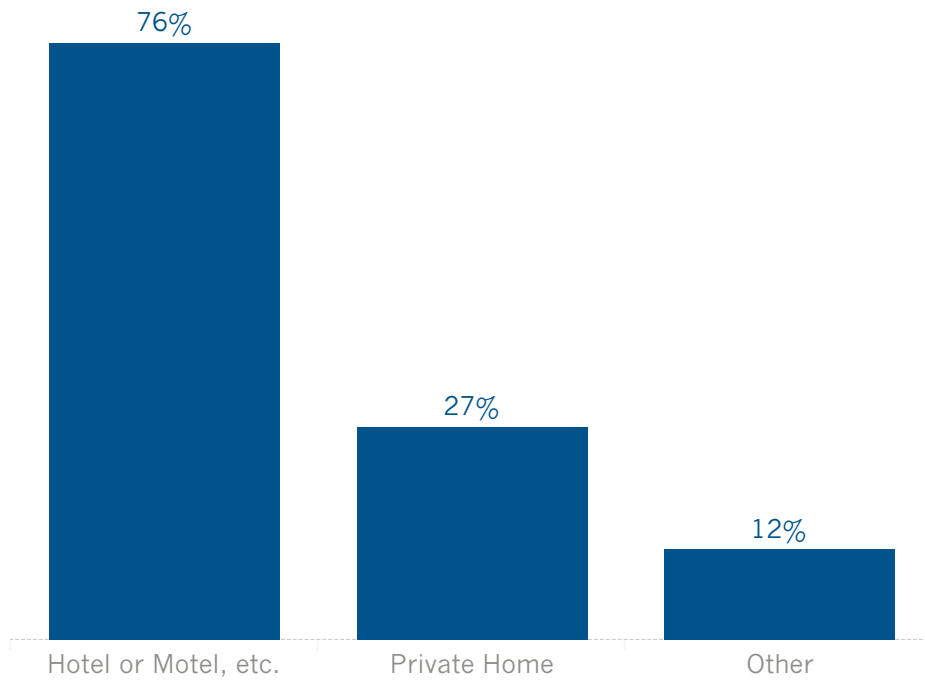


Types of Accommodations & Nights

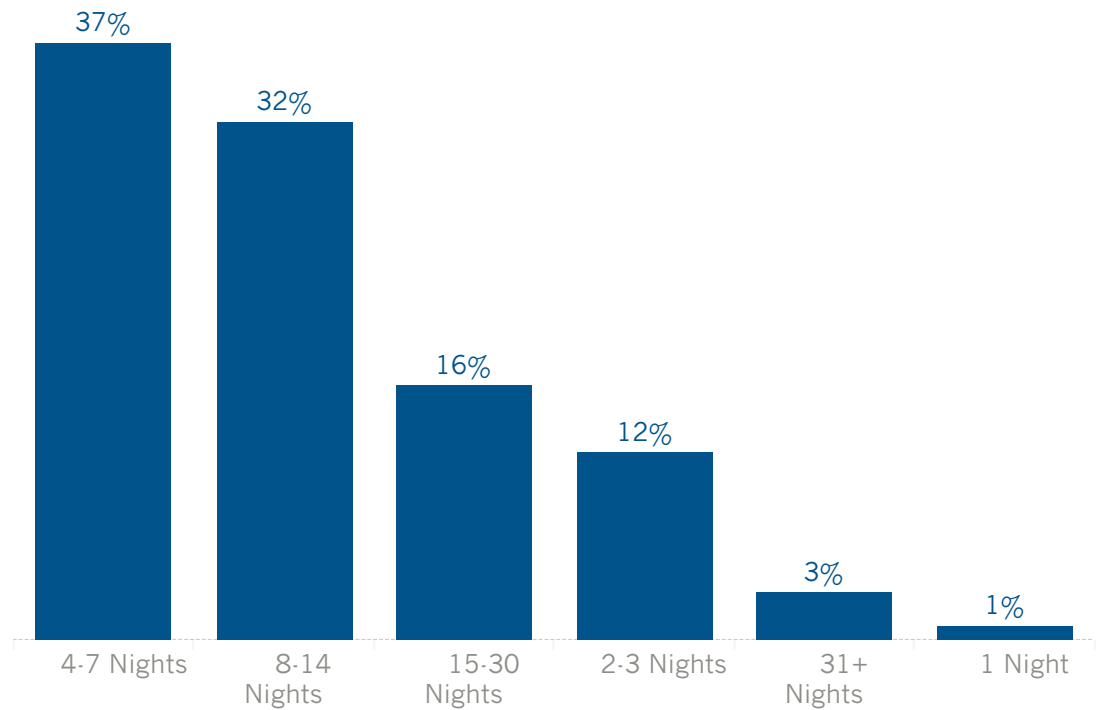
The charts below show types of accommodations stayed in and number of nights in destination among travelers from the focus market.

France

Types of Accommodations



Nights in Destination



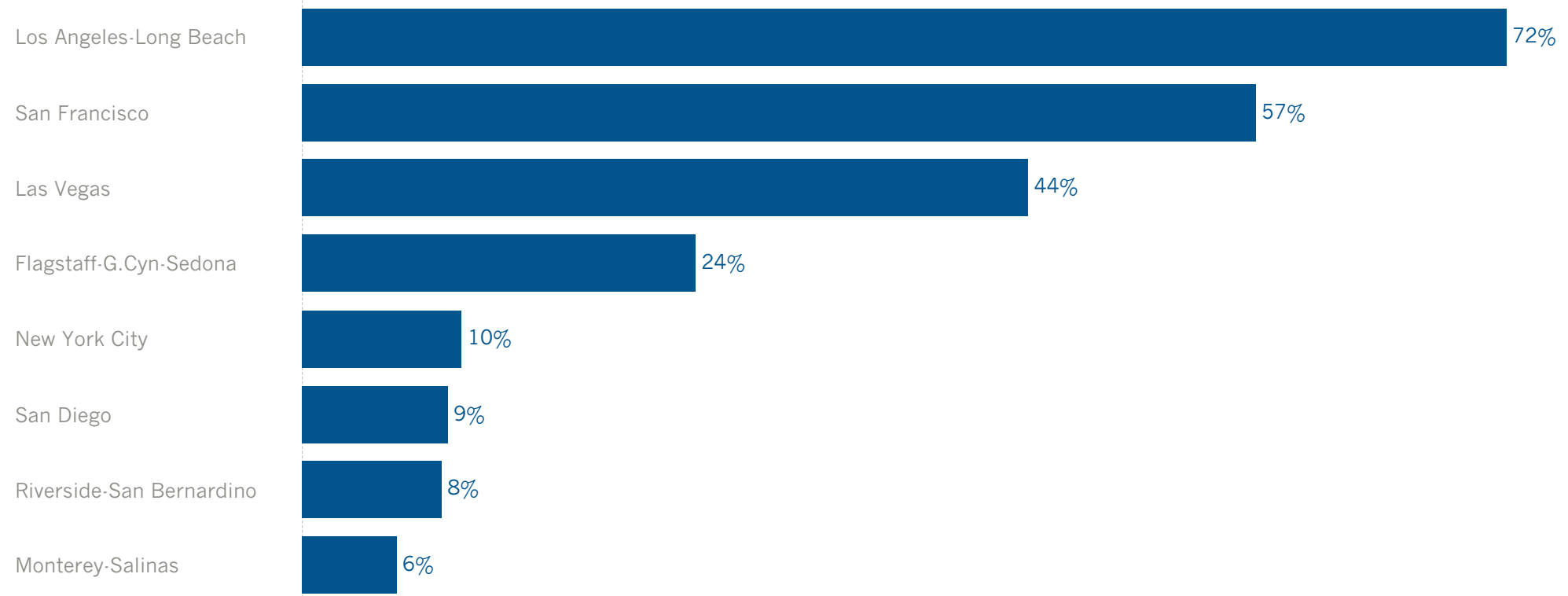


Destinations visited

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

France

US Destinations visited

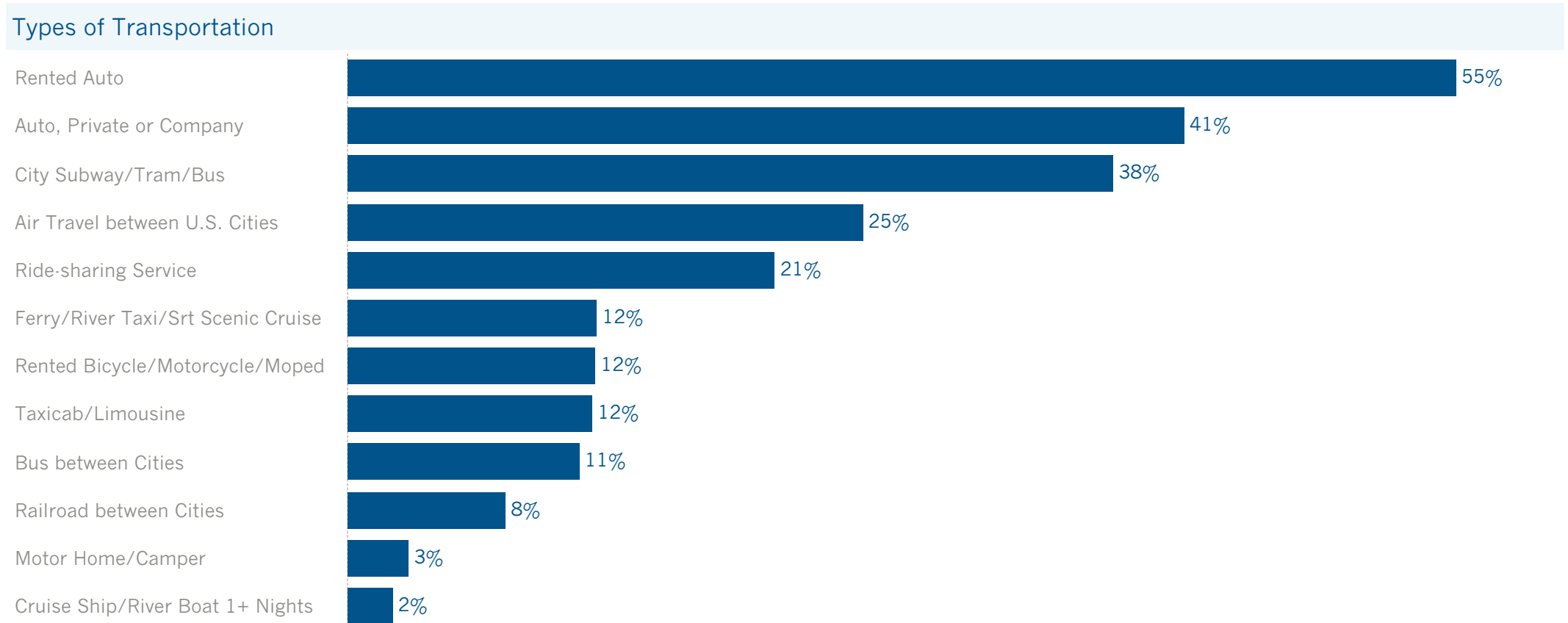




Transportation

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

France



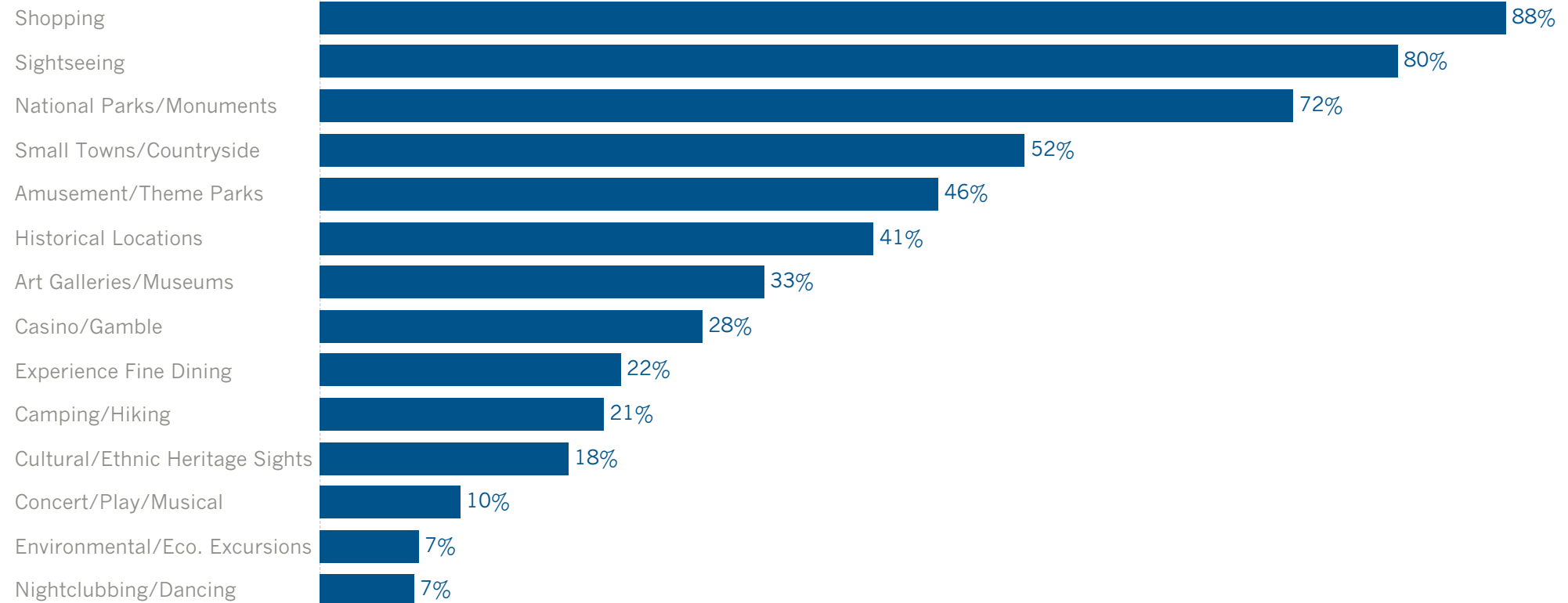


Activities

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

France

Leisure Activities





Expenditures in the US

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

France

Expenditures per visitor

