

# Global Market Profile

CHINA



September 2024

# Introduction

- Tourism Economics forecasts that domestic leisure visitation will account for \$101B in spending in California in 2024 and international visitation will account for \$28B.
- The **Global Market Profile** reports were 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).



# Market Landscape

# Country Profile

China



**POPULATION: \***

**1,419.3M**

**EXCHANGE RATE: \*\***

Local currency to USD dollar

**7.1**

**GROSS DOMESTIC PRODUCT (GDP):**

Annual % chg \*\*\*

**4.6%**

**INFLATION RATE:**

Annual % chg \*\*\*\*

**1.0%**

\* [www.worldometers.info](http://www.worldometers.info), 2024

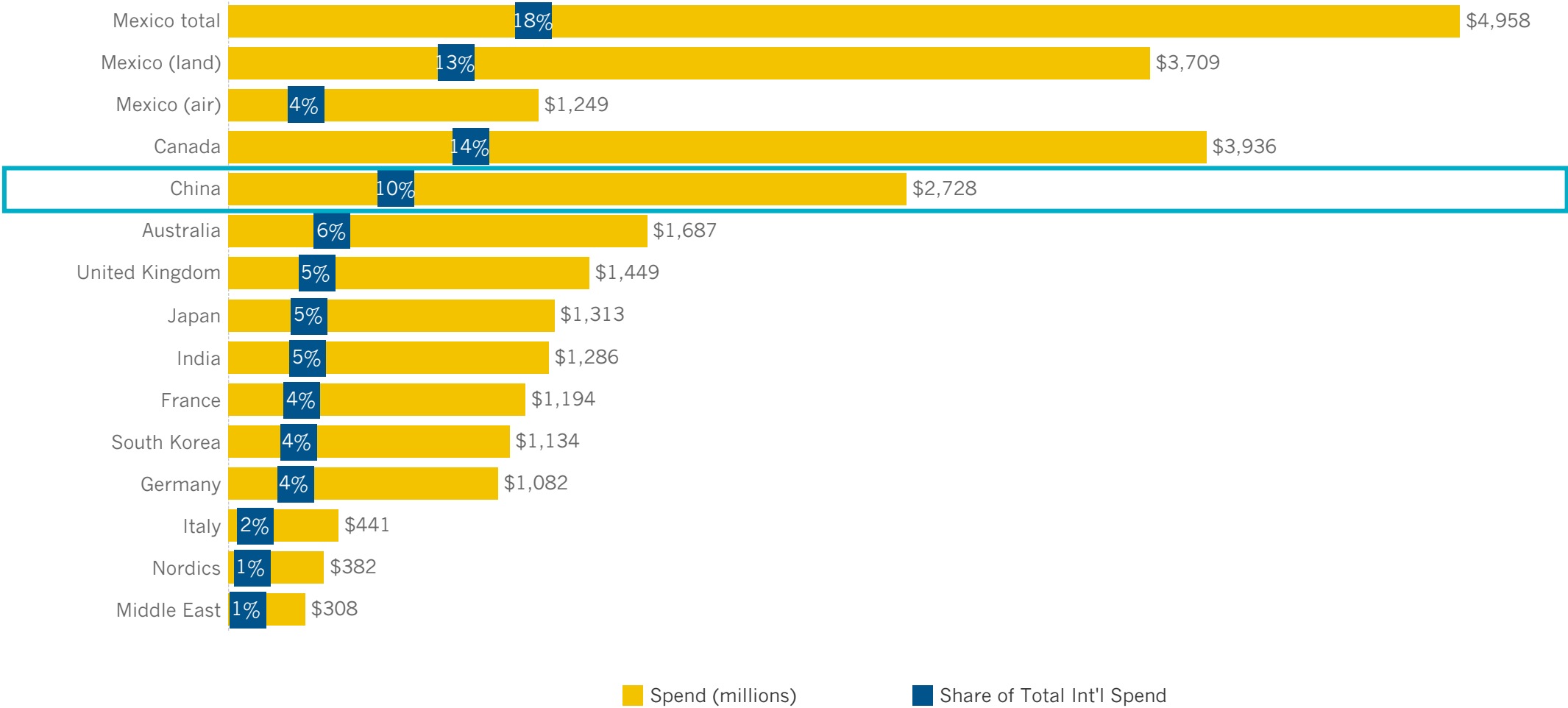
\*\* [www.x-rates.com](http://www.x-rates.com), Aug 2024

\*\*\* [www.imf.org](http://www.imf.org), 2024

\*\*\*\* [www.imf.org](http://www.imf.org), 2024

# Forecast: Visitor Spending by Market (2024)

2024 Spend Forecast

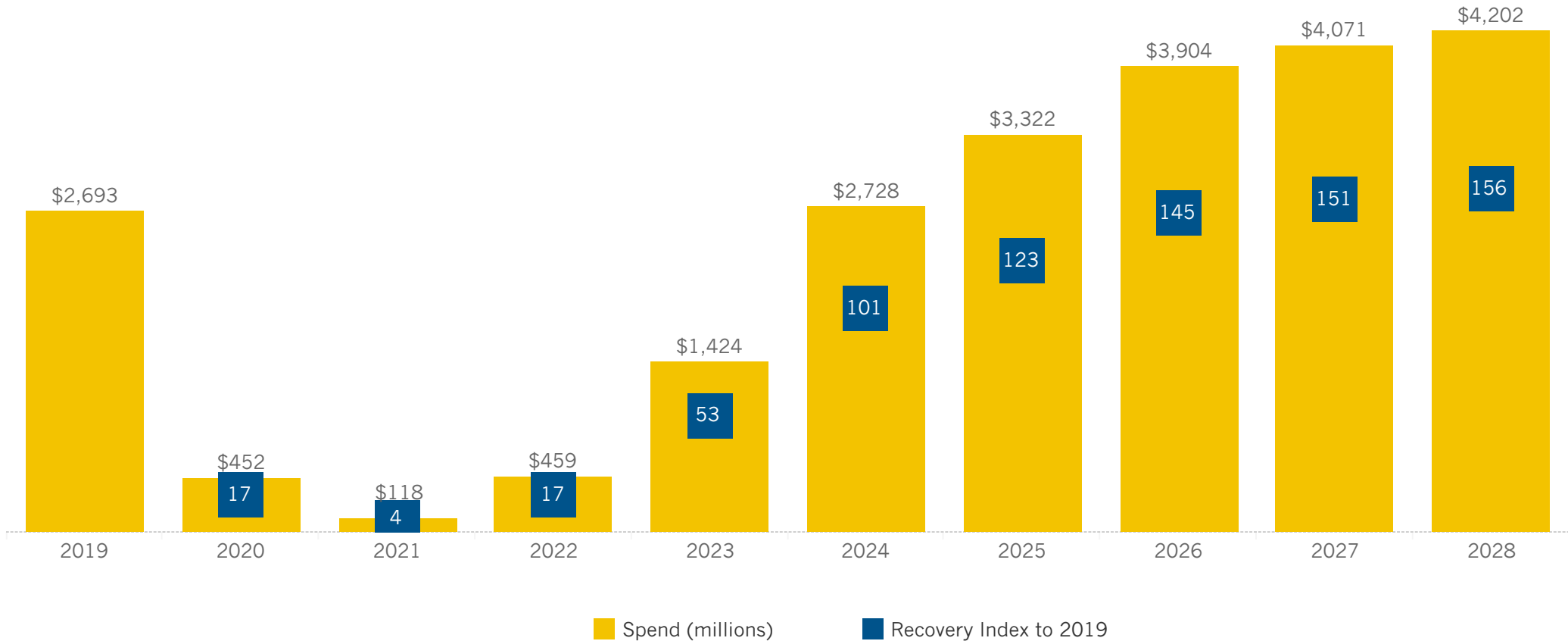


Source: Tourism Economics (June 2024)

# Forecast: Visitor Spending

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

China: Spend Forecast with Recovery Index to 2019

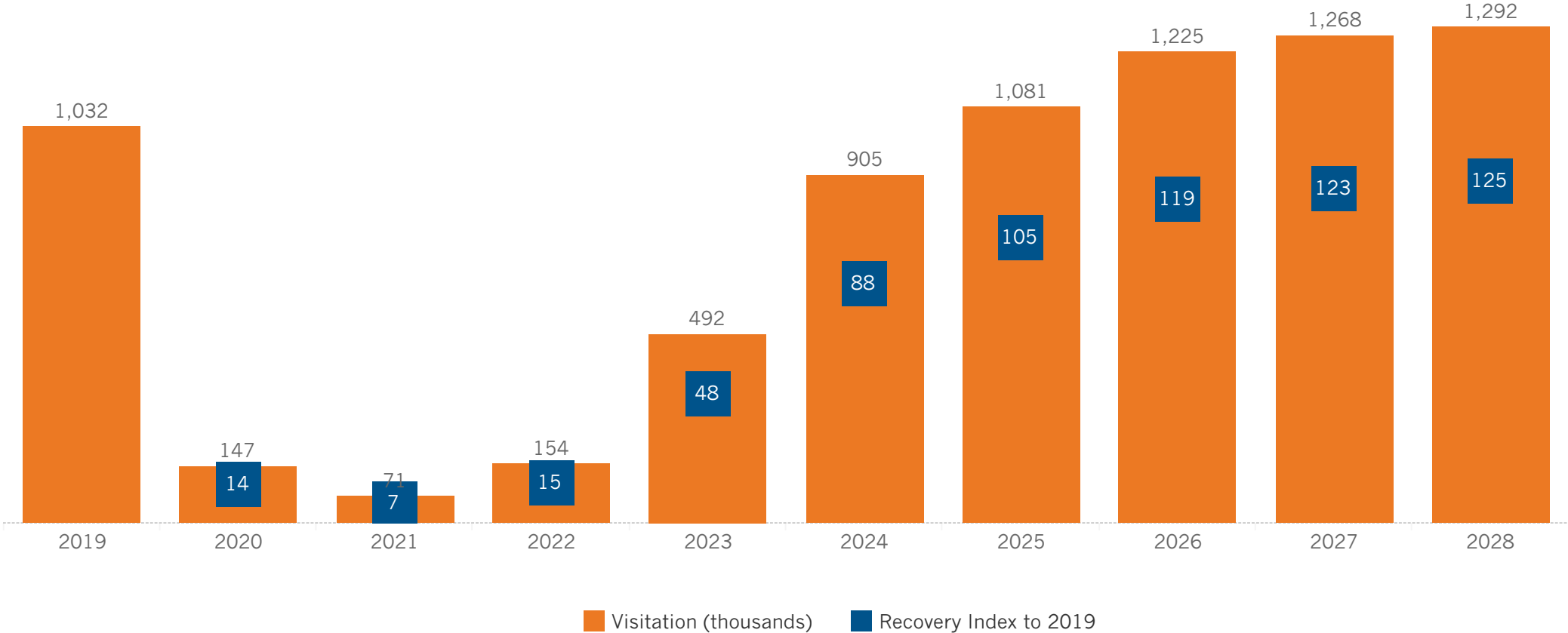




# Forecast: Visitor Volume

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

China: Visitation Forecast with Recovery Index to 2019



Source: Tourism Economics (June 2024)

# International Visitor Spending by Region

The table below shows the distribution of international visitor spending by California tourism region in total and for the focus market .

Region	Total International Visitor Spend (2023)		China Visitor Spend* (2023)		
	Spending (\$B)	%	Spending (\$B)	%	Index
Central Coast	\$0.828	3.7%	\$0.046	3.2%	88
<b>Central Valley</b>	<b>\$0.278</b>	<b>1.2%</b>	<b>\$0.018</b>	<b>1.3%</b>	<b>103</b>
Deserts	\$0.861	3.8%	\$0.012	0.8%	21
<b>Gold Country</b>	<b>\$0.168</b>	<b>0.7%</b>	<b>\$0.012</b>	<b>0.8%</b>	<b>113</b>
High Sierra	\$0.238	1.1%	\$0.008	0.5%	51
<b>Inland Empire</b>	<b>\$0.308</b>	<b>1.4%</b>	<b>\$0.029</b>	<b>2.0%</b>	<b>149</b>
<b>Los Angeles</b>	<b>\$8.113</b>	<b>36.0%</b>	<b>\$0.564</b>	<b>39.6%</b>	<b>110</b>
North Coast	\$0.037	0.2%	\$0.001	0.1%	40
<b>Orange County</b>	<b>\$2.219</b>	<b>9.8%</b>	<b>\$0.193</b>	<b>13.5%</b>	<b>138</b>
San Diego	\$3.062	13.6%	\$0.087	6.1%	45
<b>San Francisco Bay Area</b>	<b>\$6.407</b>	<b>28.4%</b>	<b>\$0.454</b>	<b>31.9%</b>	<b>112</b>
Shasta Cascade	\$0.030	0.1%	\$0.001	0.1%	40
<b>Total California</b>	<b>\$22.549</b>	<b>100%</b>	<b>\$1.424</b>	<b>100%</b>	

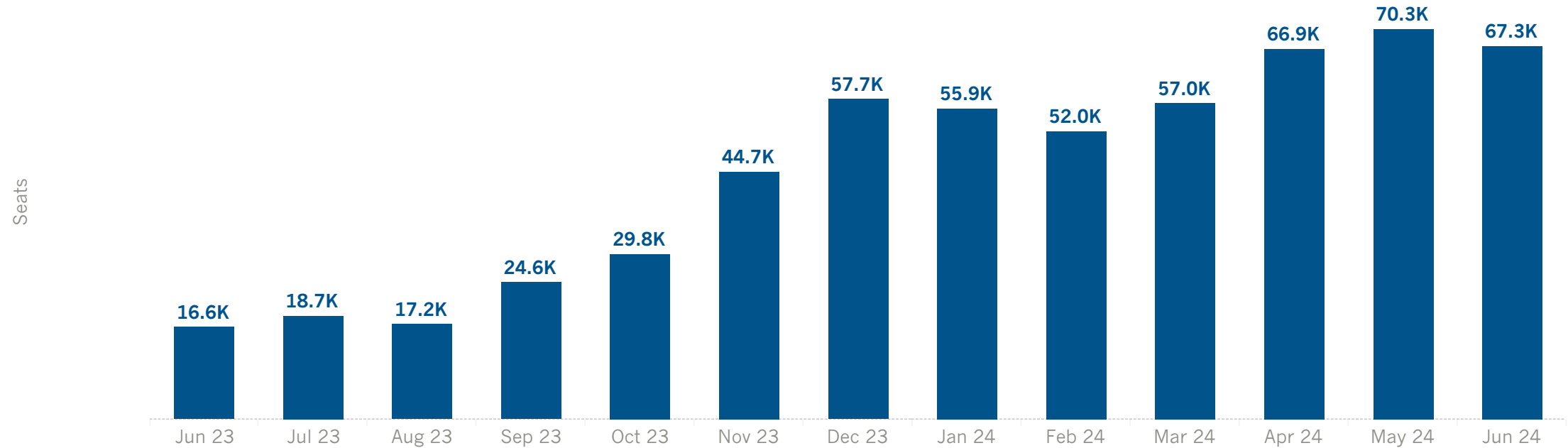
\*Regional visitor spending for the focus market is estimated using a Visit California proprietary model that adjusts statewide visitor spending estimates for the focus market to the region-level using Visa Destination Insights credit card data. The index shown compares the regional share of spending from the focus market to the share of total international spending in the region.

Source: Tourism Economics/Visa Destination Insights/Visit California Research (June 2024)

# Airlift to California

The charts below shows airlift to California for the focus market.

## China: Non-Stop Seats

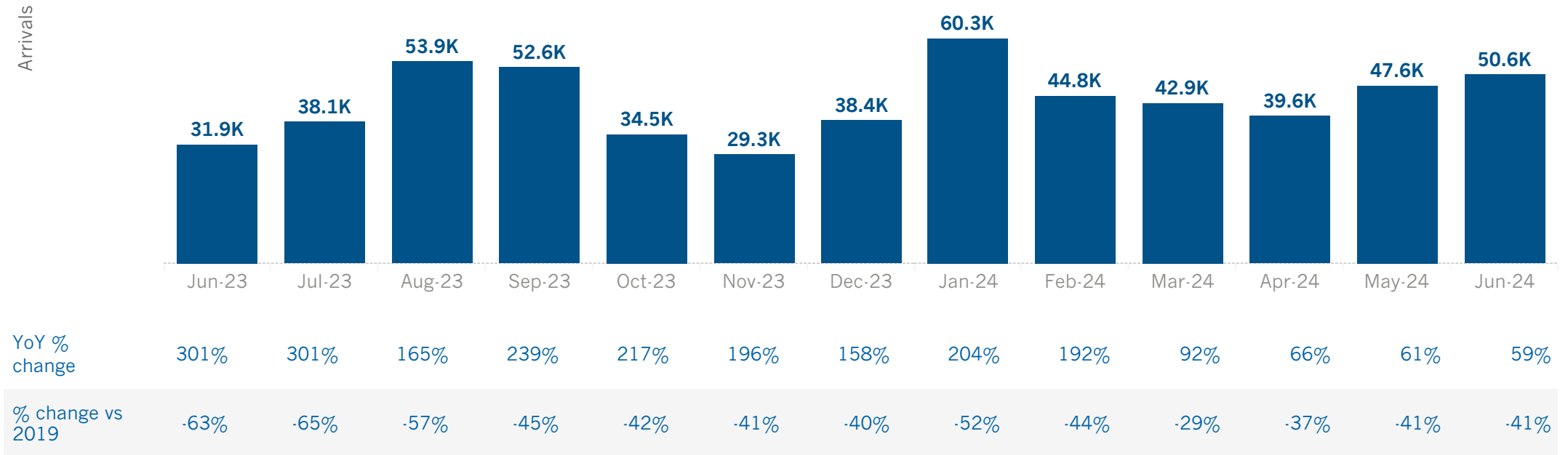


YoY % Chg	25%	83%	48%	114%	150%	336%	679%	596%	344%	354%	390%	400%	305%
% Chg vs 2019	-92%	-91%	-92%	-87%	-85%	-73%	-69%	-72%	-69%	-70%	-66%	-67%	-68%

# Non-Resident Arrivals to California

The chart below shows non-resident arrivals at California's ports of entry for the focus market.

China: Non-Resident Arrivals at Ports of Entry



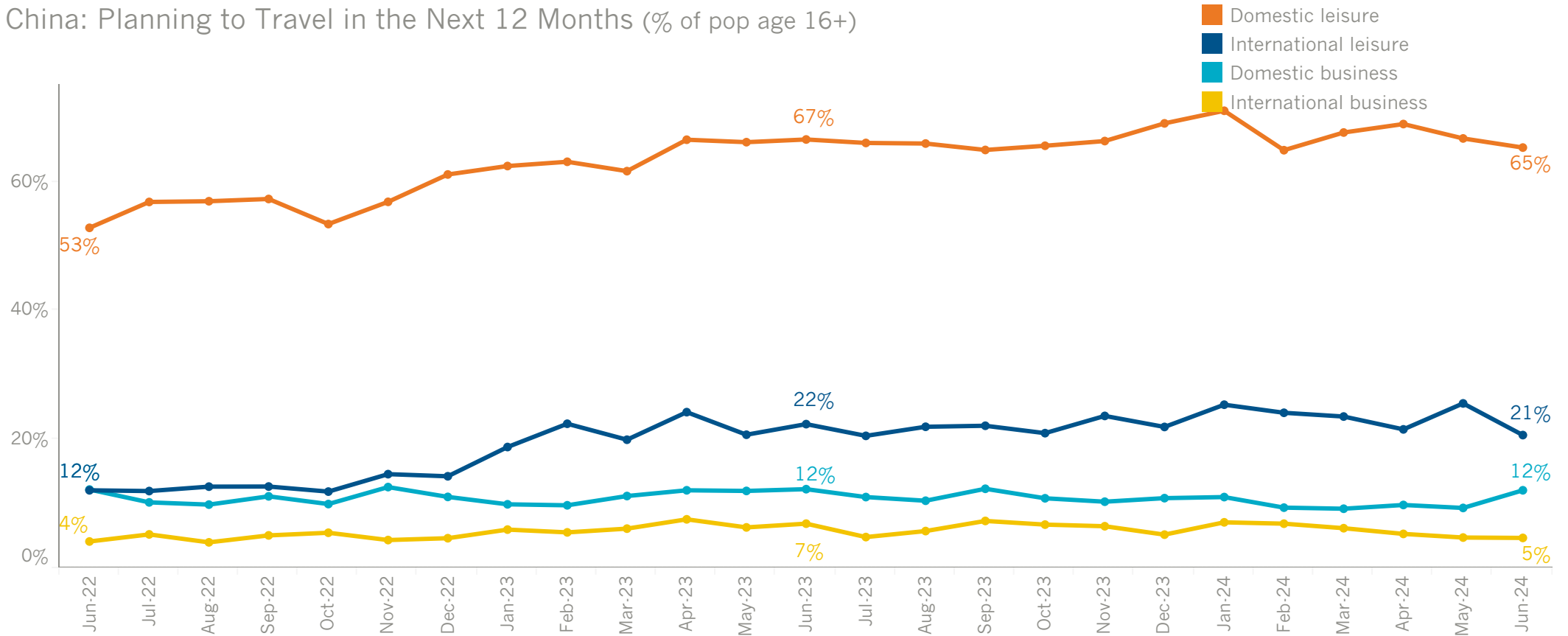
# California's Int'l Market Share (Visits)

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
<b>Total</b>	22.2%	21.9%	22.6%	23.3%	22.7%	22.8%	22.0%	19.5%	23.3%	23.1%	22.5%
<b>Mexico</b>	51.3%	44.6%	42.4%	41.7%	43.0%	43.2%	41.9%	29.5%	35.8%	47.9%	48.0%
<b>China</b>	46.3%	46.1%	41.4%	42.9%	36.5%	38.1%	36.5%	38.9%	37.0%	41.8%	45.6%
<b>Australia</b>	48.2%	49.2%	49.4%	49.3%	46.2%	44.6%	45.3%	41.2%	40.0%	39.4%	43.1%
<b>India</b>	26.9%	25.1%	28.2%	25.8%	25.8%	30.0%	28.5%	26.8%	19.2%	25.7%	27.2%
<b>France</b>	27.7%	27.4%	26.6%	28.0%	26.0%	26.8%	24.8%	21.2%	22.5%	27.0%	25.9%
<b>South Korea</b>	29.2%	26.2%	24.8%	25.1%	23.9%	24.3%	21.1%	21.4%	27.1%	23.8%	24.5%
<b>Germany</b>	21.8%	22.5%	21.8%	22.1%	23.4%	23.8%	21.8%	20.1%	16.5%	23.7%	22.9%
<b>Japan</b>	13.6%	14.8%	15.7%	15.2%	14.7%	15.7%	14.9%	14.9%	24.7%	21.6%	22.7%
<b>Italy</b>	16.7%	18.7%	21.4%	22.0%	19.2%	21.8%	18.8%	14.2%	15.5%	20.6%	17.9%
<b>Nordics</b>	20.1%	19.6%	22.7%	20.7%	24.8%	22.9%	20.7%	23.8%	20.3%	26.4%	17.4%
<b>United Kingdom</b>	17.3%	15.7%	16.6%	17.4%	16.3%	17.4%	15.8%	16.6%	18.4%	17.0%	16.1%
<b>Middle East</b>	11.7%	13.7%	13.5%	15.5%	11.5%	11.3%	9.8%	4.8%	10.7%	10.2%	9.2%
<b>Canada</b>	6.7%	7.1%	7.6%	8.0%	8.1%	8.0%	8.4%	8.3%	12.3%	9.1%	8.6%
<b>Brazil</b>	8.7%	9.4%	9.1%	9.9%	10.8%	8.6%	9.2%	8.3%	7.9%	8.7%	8.0%

# Travel Planned in Next 12 Months

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

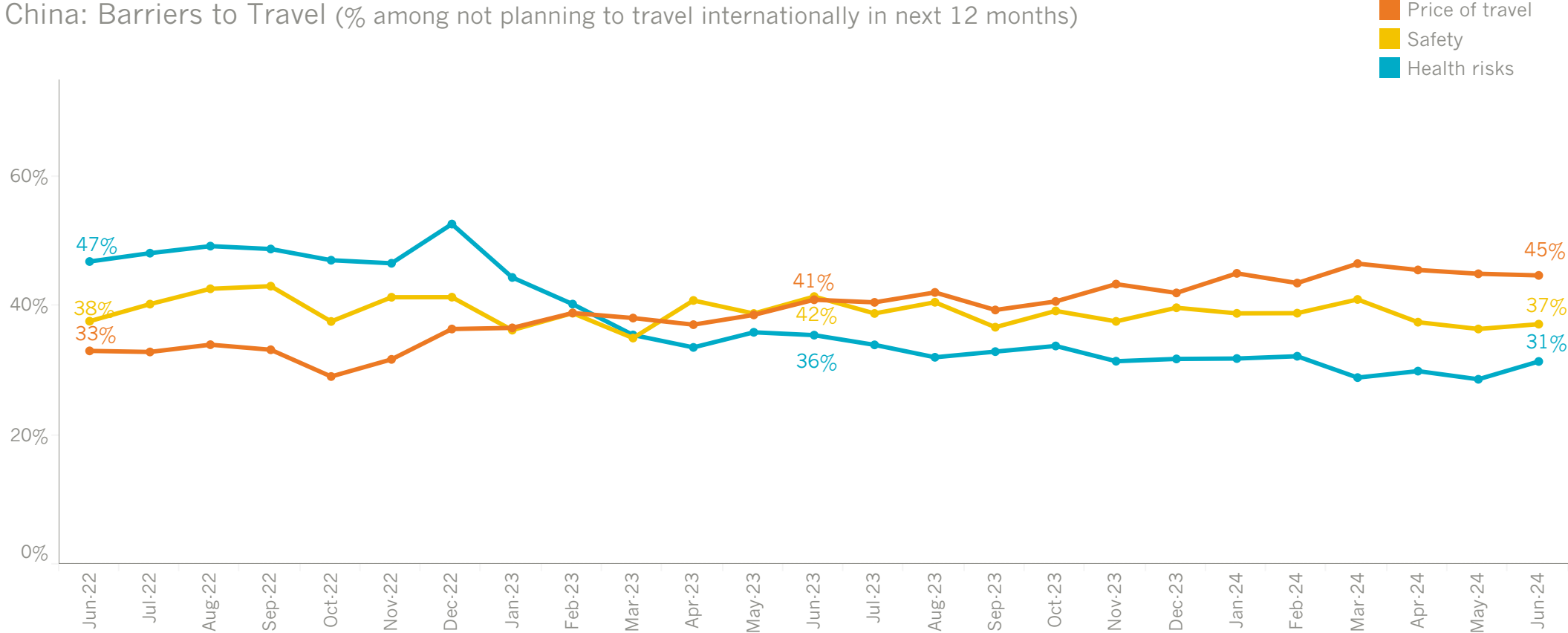
China: Planning to Travel in the Next 12 Months (% of pop age 16+)



# Barriers to Travel

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

China: 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: June 2024

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:

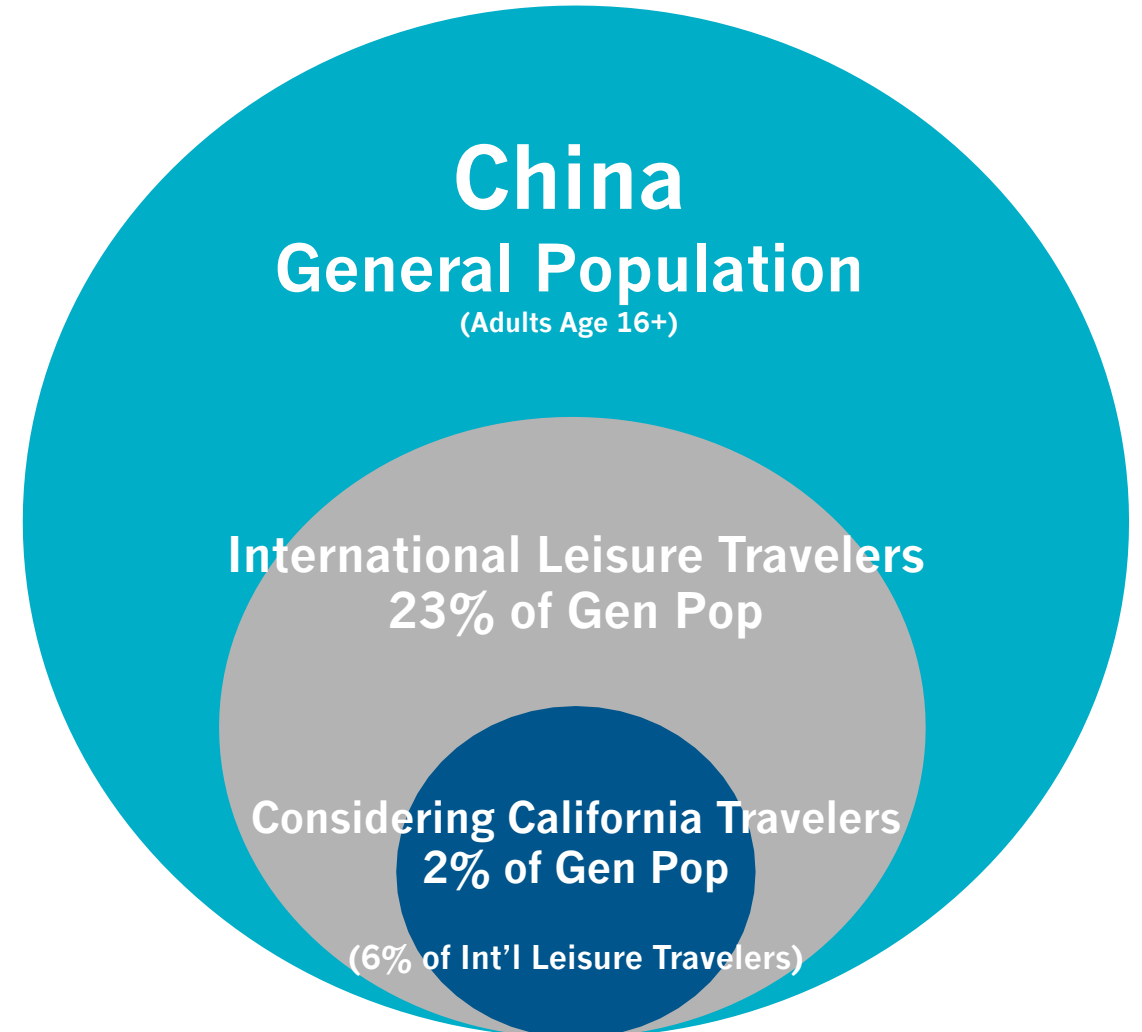
### International Leisure Travelers:

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.

\*Note: Due to sample size limitations for the China and Japan markets, the YouGov profile reporting is supplemented with sample of travelers considering U.S. destinations for leisure travel in addition to travelers specifically considering California. The target size shown to the right, however, reflects travelers considering California.



# 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.

## China

Gender		
	CA Traveler Target	Index
Female	41%	98
Male	59%	101

Marital Status		
	CA Traveler Target	Index
Married	65%	97
Single	20%	113

Family Status		
	CA Traveler Target	Index
Children <18	59%	118

Age		
	CA Traveler Target	Index
Age 16-24	10%	69
Age 25-34	41%	110
Age 35-44	21%	78
Age 45-54	19%	132
Age 55+	8%	132

Generation		
	CA Traveler Target	Index
Gen Z	9%	67
Millennial	60%	99
Gen X	26%	112
Baby Boomer	5%	178

Income*		
	CA Traveler Target	Index
Higher income	9%	112
Middle income	48%	126
Lower income	37%	75
Prefer not to say	6%	125

Region		
	CA Traveler Target	Index
Shanghai	15%	111
Guangzhou	10%	179
Chengdu	9%	137
Beijing	7%	128
Chongqing	5%	149
Hangzhou	5%	108
Shenyang	3%	209
Shenzhen	3%	105
Nanjing	3%	88
Xian	1%	45

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



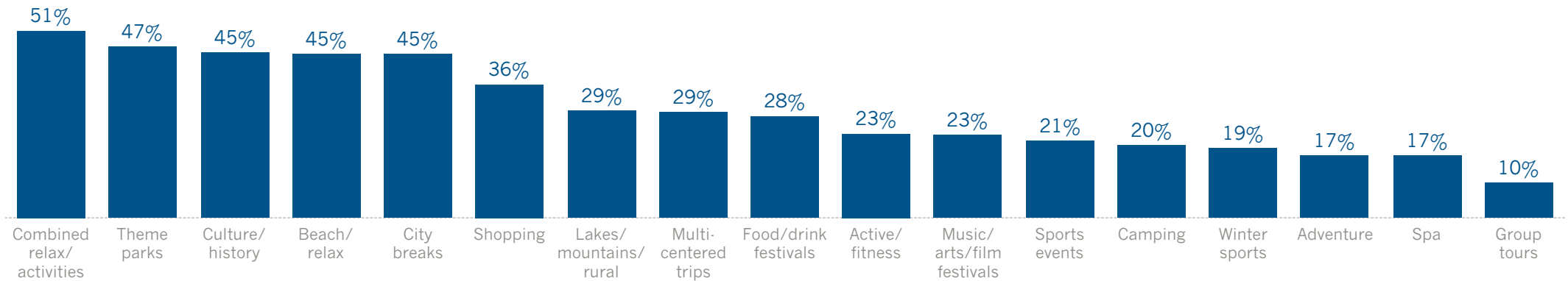
Int'l leisure travelers  
considering California  
"CA Traveler Target"

# Trip Preferences/Characteristics

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

## China

### Trip Type



### Traveler Type

	CA Traveler Target	Index
Budget	54%	92
Responsible	22%	114
Luxury	13%	131
Adventurous	4%	111
All-inclusive	2%	78

### Travel Party (from most recent vacation)

	CA Traveler Target	Index
My partner	70%	105
My children	52%	118
Other family	29%	124
Friend(s)	27%	106
Other person(s)	5%	111
Solo	3%	70

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 (July 2023 to June 2024)



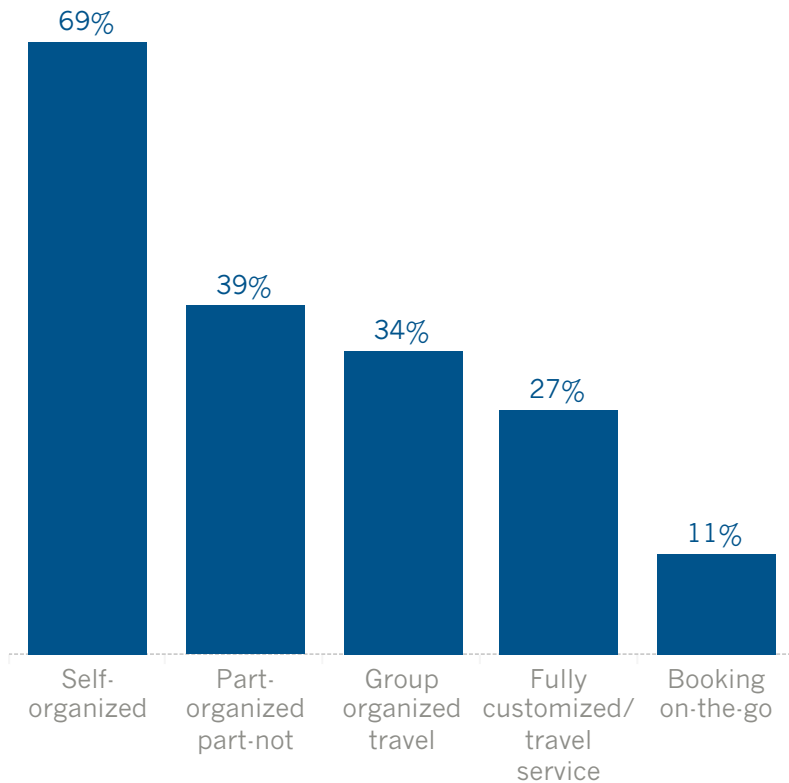
Int'l leisure travelers  
considering California  
"CA Traveler Target"

# Organizing/Planning Methods

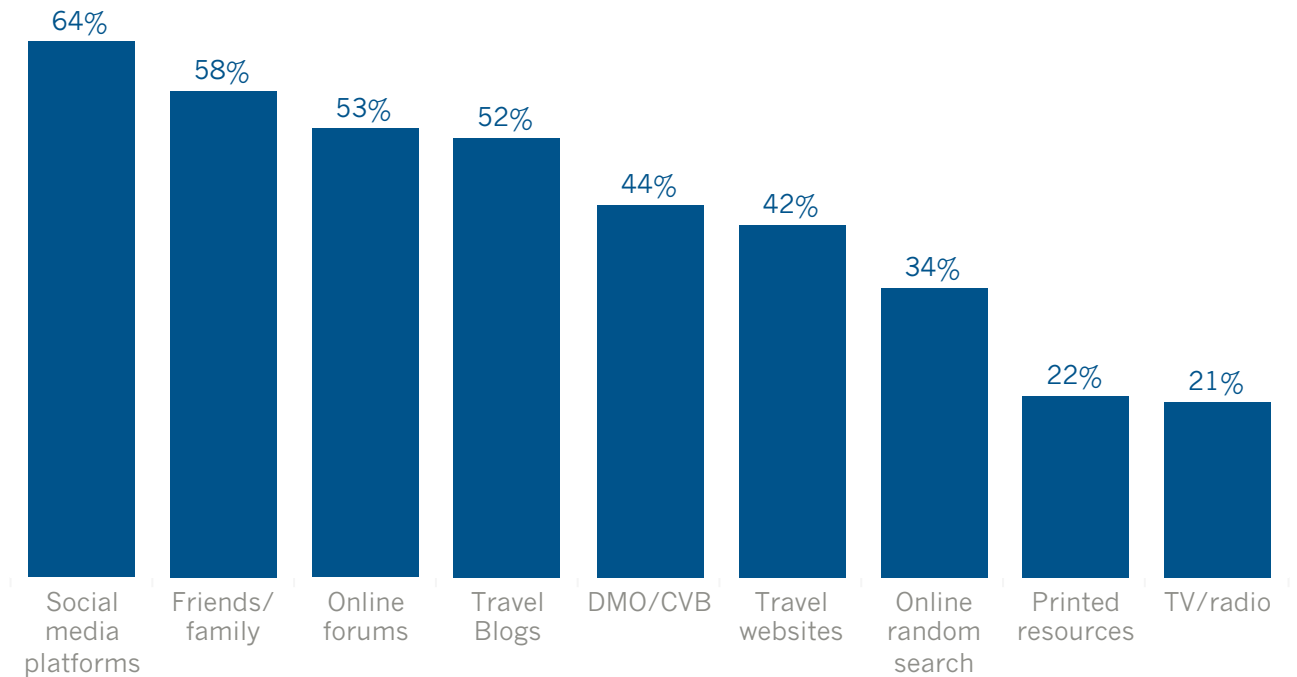
The chart below shows the organizing and planning methods of of the consumer target in the focus market.

## China

### 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 (July 2023 to June 2024)

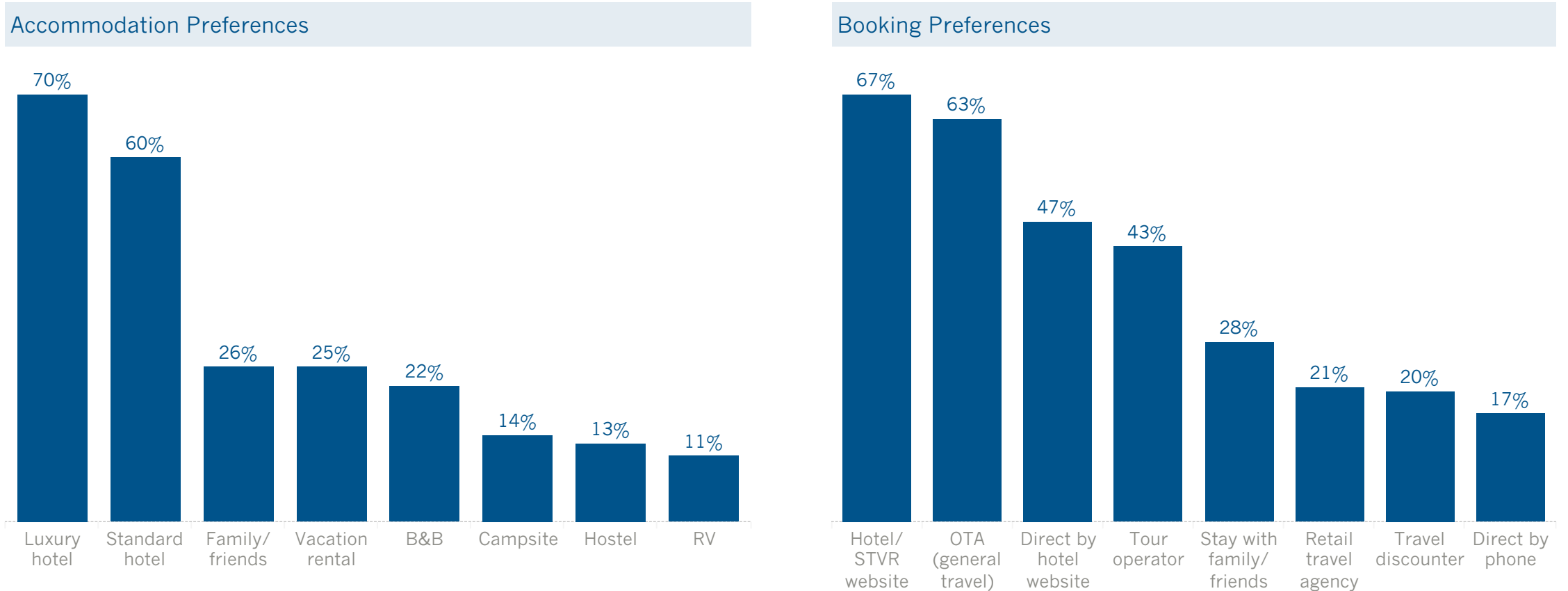


Int'l leisure travelers  
considering California  
"CA Traveler Target"

# Booking Preferences

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

## China



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?



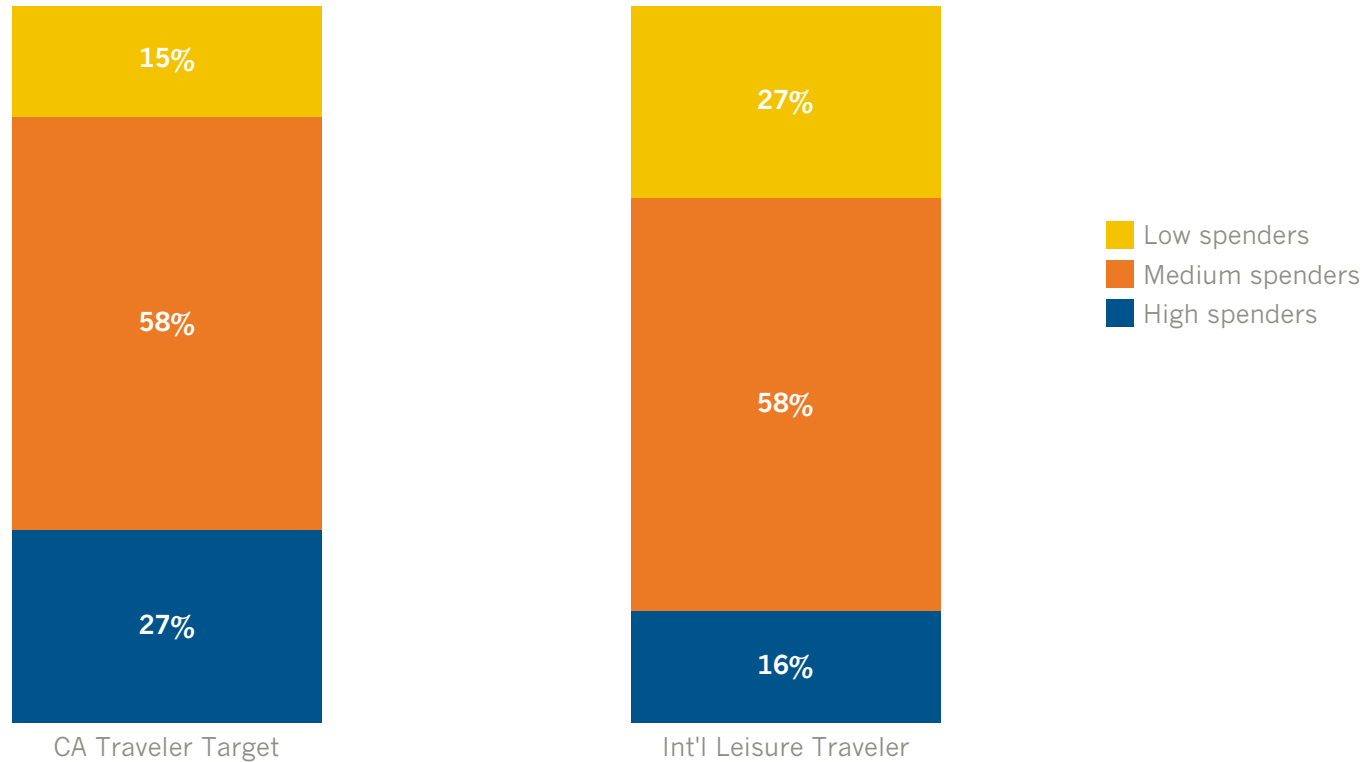
Int'l leisure travelers  
considering California  
"CA Traveler Target"

# Travel Spending

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

## China

Travel Spending (from most recent vacation)





# Media & Advertising

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

## China

### Advertising Influences

	CA Traveler Target	Index
Social media	60%	127
Online streaming services	56%	120
Travel websites	51%	125
Billboards	38%	121
Cinema	35%	124
TV - Free to view channels	34%	126
Magazines (digital)	28%	138
Public transport	26%	114
Local newspaper (digital)	25%	136
Direct mail	24%	126
Podcast	21%	175
National newspaper (digital)	20%	131
Magazines (physical)	20%	134
Local newspaper (physical)	19%	123
National newspaper (physical)	19%	157
TV - paid/subscription	11%	124
Radio	8%	98

### Sports Watched/Followed

	CA Traveler Target	Index
Basketball	49%	137
Soccer/Football	45%	135
Swimming	37%	127
Tennis	29%	116
Running/Marathon	26%	131
Cycling	22%	144
Volleyball	21%	116
Athletics/Track & Field	21%	160
Gymnastics	21%	121
Boxing	17%	166
Golf	14%	169
NFL	13%	211
Surfing	11%	160
Baseball	10%	164
Horse Racing	8%	140
Rugby League	8%	241
Cricket	6%	216
Australian Rules Football	6%	173
Ice Hockey	6%	94