

Global Market Profile

AUSTRALIA



October 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

Australia



POPULATION: *

26.7M

EXCHANGE RATE: **

Local currency to USD dollar

1.5

GROSS DOMESTIC PRODUCT (GDP):

Annual % chg ***

1.5%

INFLATION RATE:

Annual % chg ****

3.5%

* www.worldometers.info, 2024

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

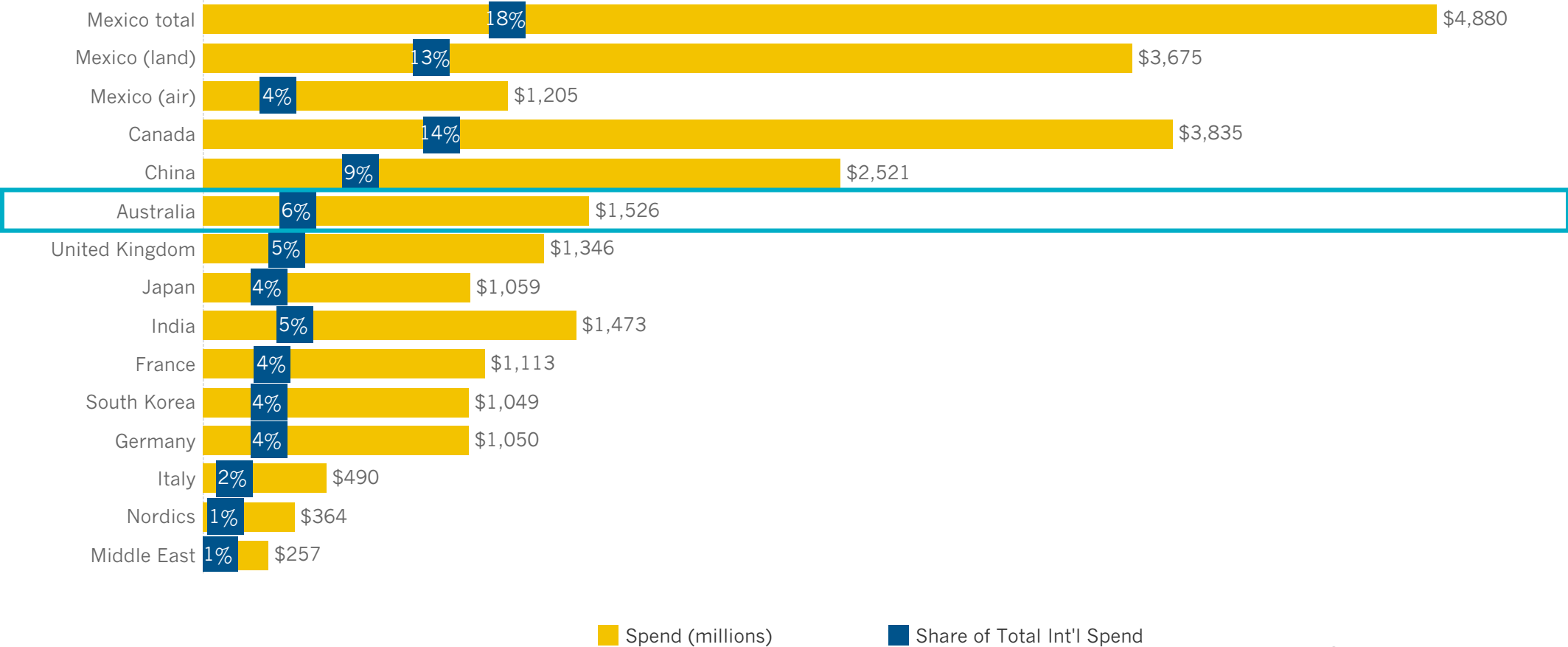
*** www.imf.org, 2024

**** www.imf.org, 2024

Forecast: Visitor Spending by Market (2024)

The chart below shows California's visitor spending forecast for the state's 13 target markets and share of total international spending in the state.

2024 Spend Forecast

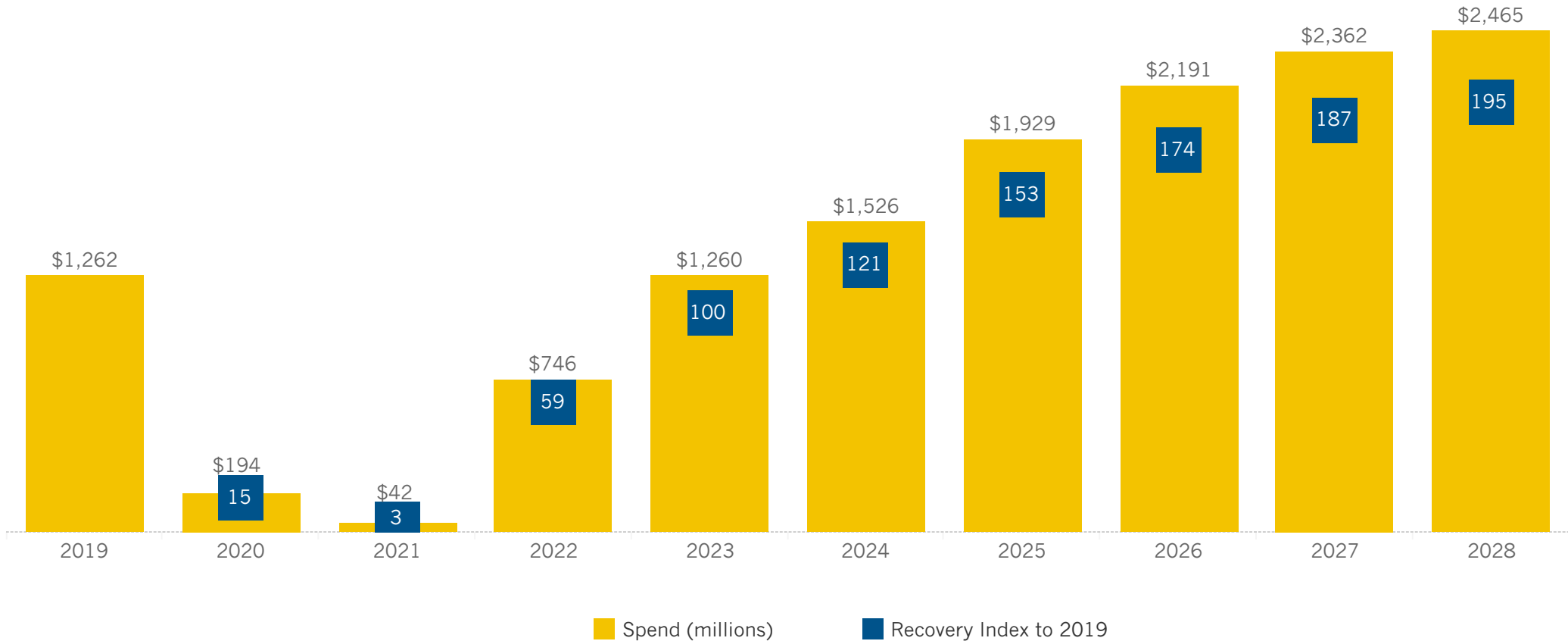


Source: Tourism Economics (October 2024)

Forecast: Visitor Spending

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

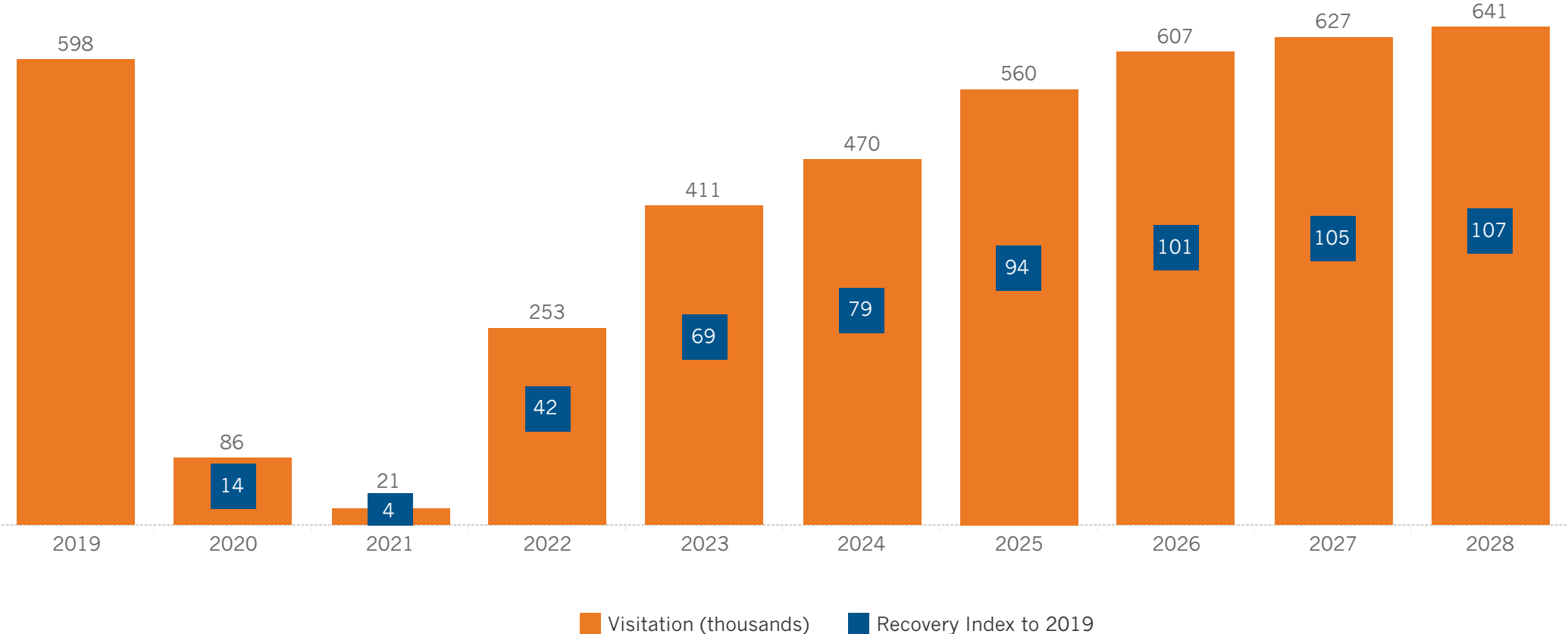
Australia: Spend Forecast with Recovery Index to 2019



Forecast: Visitor Volume

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

Australia: Visitation Forecast with Recovery Index to 2019



Source: Tourism Economics (October 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)		Australia Visitor Spend* (2023)		
	Spending (\$B)	%	Spending (\$B)	%	Index
Central Coast	\$0.828	3.7%	\$0.040	3.2%	86
Central Valley	\$0.278	1.2%	\$0.013	1.0%	83
Deserts	\$0.861	3.8%	\$0.027	2.2%	57
Gold Country	\$0.168	0.7%	\$0.009	0.7%	95
High Sierra	\$0.238	1.1%	\$0.018	1.4%	137
Inland Empire	\$0.308	1.4%	\$0.009	0.7%	53
Los Angeles	\$8.113	36.0%	\$0.615	48.8%	136
North Coast	\$0.037	0.2%	\$0.002	0.2%	93
Orange County	\$2.219	9.8%	\$0.144	11.4%	116
San Diego	\$3.062	13.6%	\$0.074	5.9%	43
San Francisco Bay Area	\$6.407	28.4%	\$0.307	24.3%	86
Shasta Cascade	\$0.030	0.1%	\$0.002	0.2%	125
Total California	\$22.549	100%	\$1.260	100%	

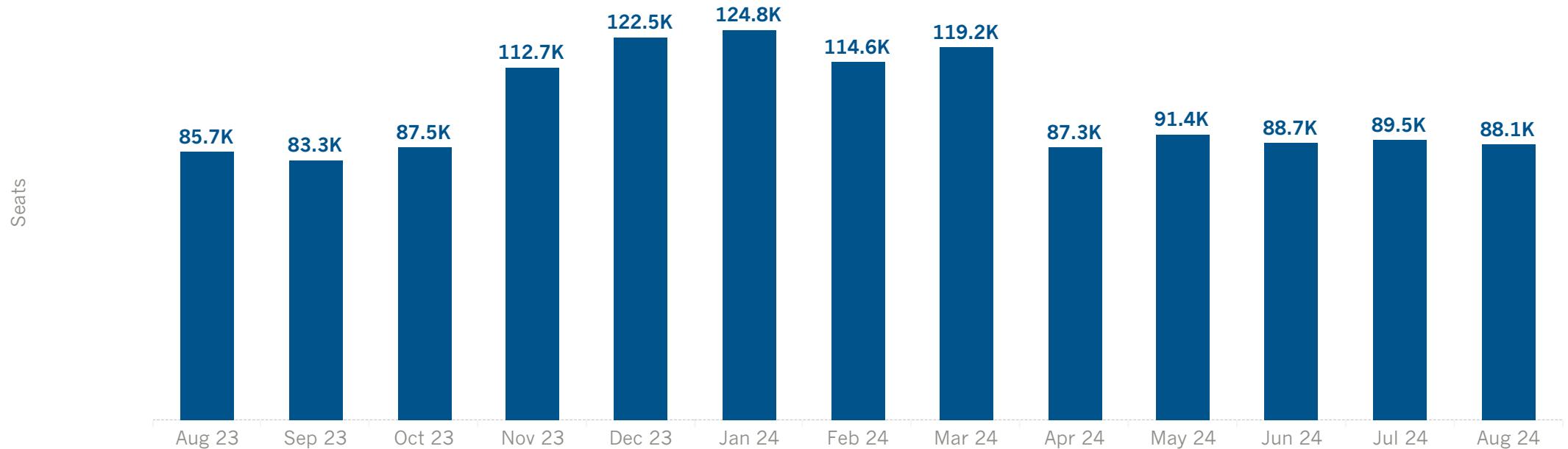
*Regional visitor spending for the focus market is estimated using a Visit California proprietary model that adjusts statewide visitor spending estimates for the focus market to the region-level using Visa Destination Insights credit card data. The index shown compares the regional share of spending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

Australia: Non-Stop Seats

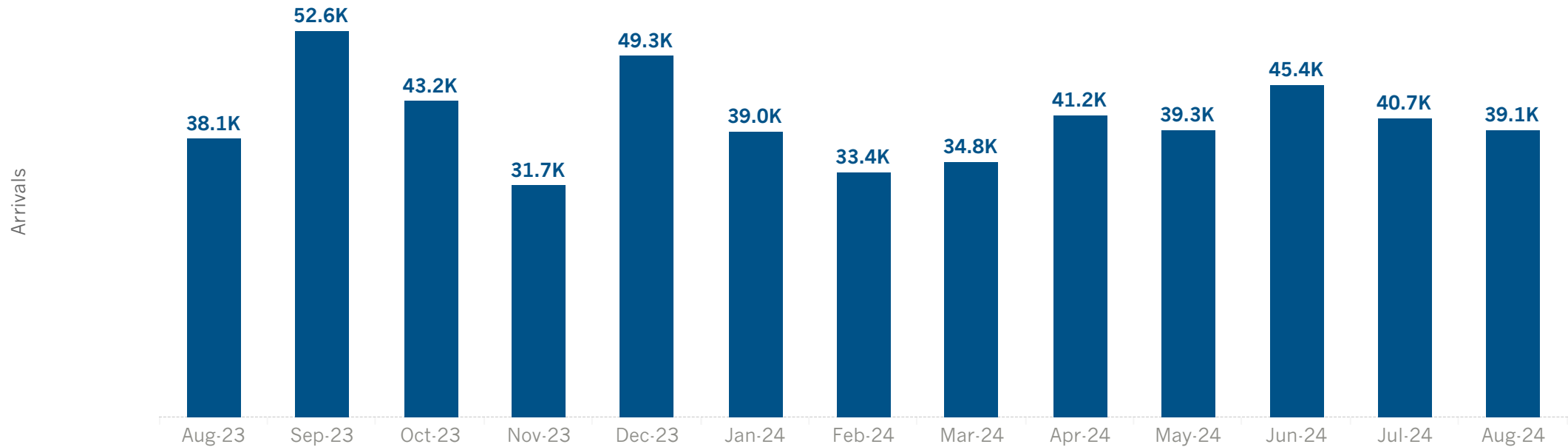


YoY % Chg	40%	34%	38%	53%	45%	34%	37%	35%	8%	9%	3%	3%	3%
% Chg vs 2019	-29%	-28%	-28%	-2%	-6%	-4%	5%	-4%	-25%	-23%	-24%	-26%	-27%

Non-Resident Arrivals to California

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

Australia: Non-Resident Arrivals at Ports of Entry



YoY % chg	36%	26%	24%	26%	27%	14%	9%	10%	36%	19%	8%	9%	-1%	3%
% chg vs 2019	-32%	-39%	-40%	-31%	-30%	-34%	-27%	-33%	-9%	-25%	-35%	-39%	-33%	-38%

California's Int'l Market Share (Visits)

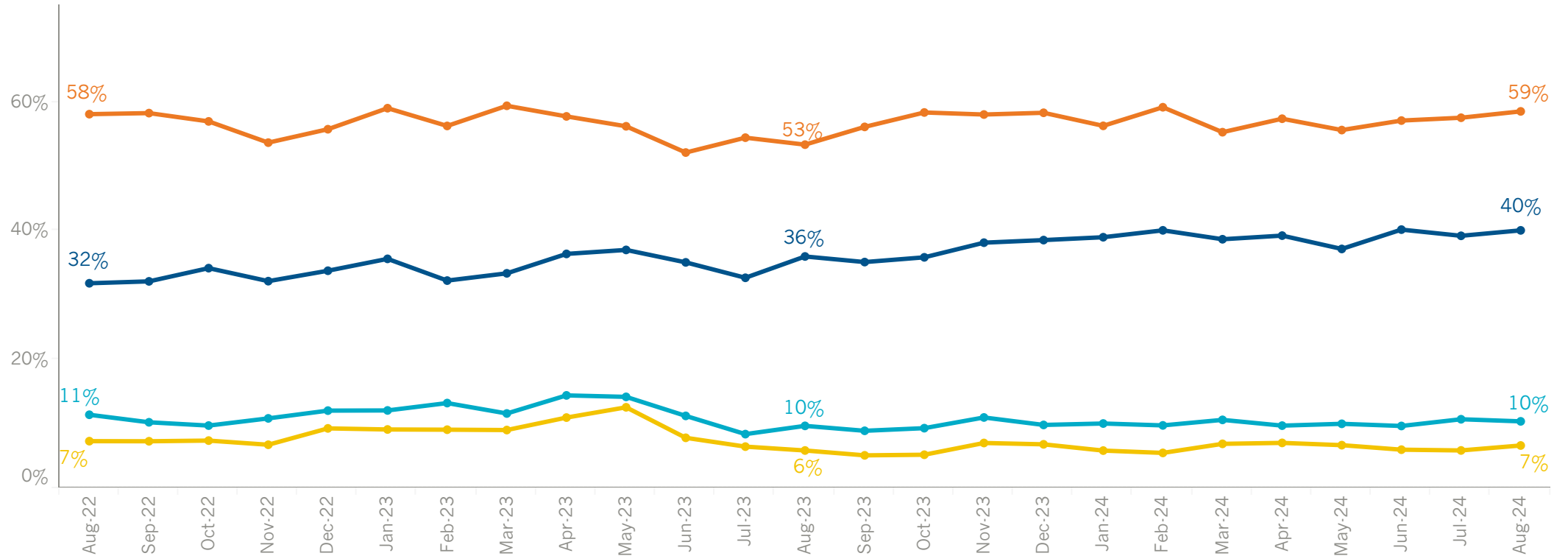
	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Total	22.2%	21.9%	22.6%	23.3%	22.7%	22.8%	22.0%	19.5%	23.3%	23.1%	22.5%
Mexico	51.3%	44.6%	42.4%	41.7%	43.0%	43.2%	41.9%	29.5%	35.8%	47.9%	48.0%
China	46.3%	46.1%	41.4%	42.9%	36.5%	38.1%	36.5%	38.9%	37.0%	41.8%	45.6%
Australia	48.2%	49.2%	49.4%	49.3%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

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

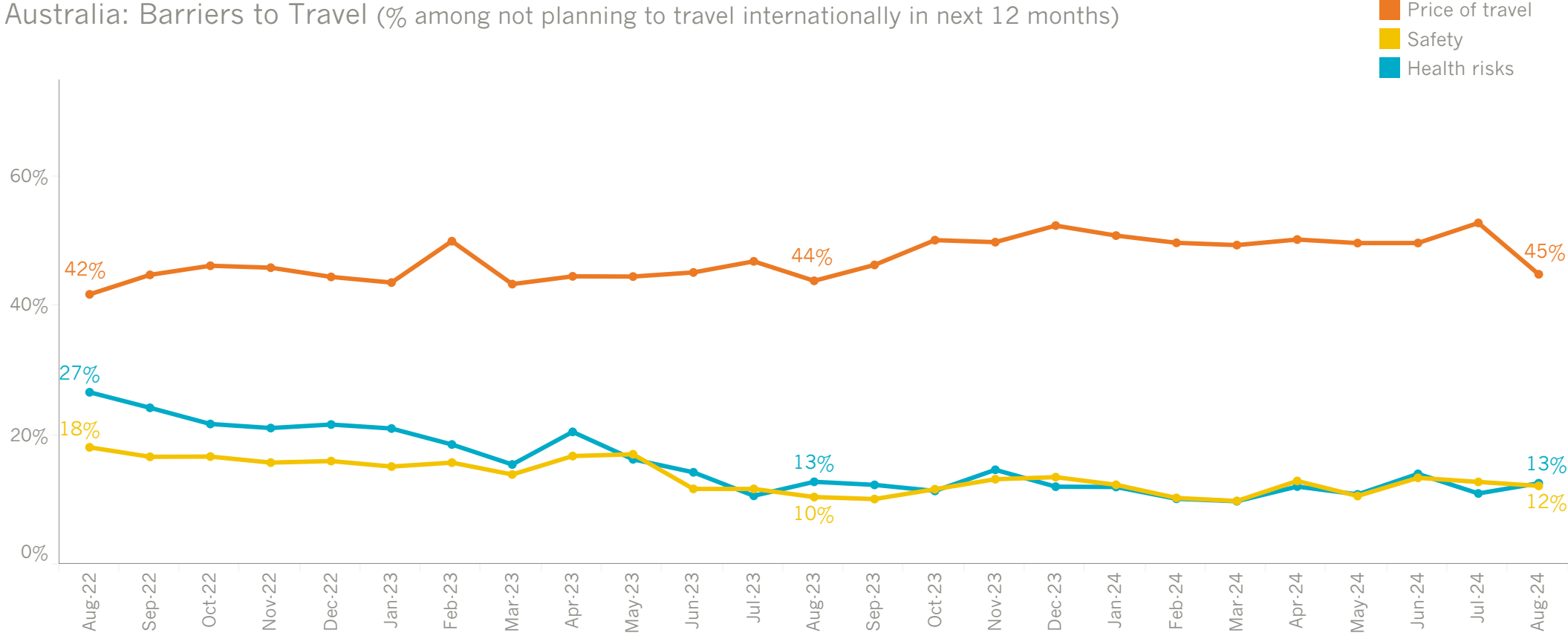
- Domestic leisure
- Domestic business
- International leisure
- International business



Barriers to Travel

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

Australia: 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: August 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.

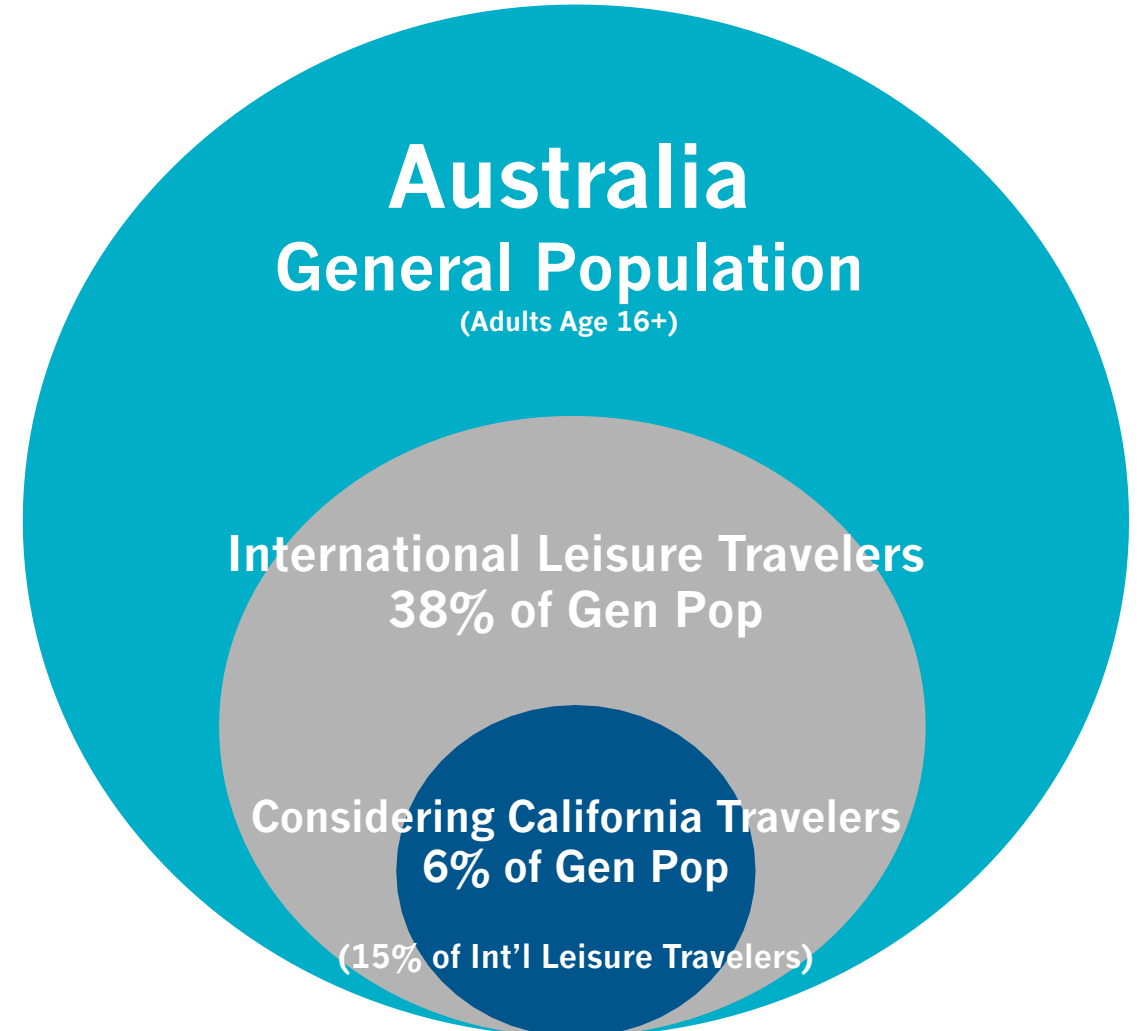
Definitions:

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.



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.

Australia

Gender		
	CA Traveler Target	Index
Female	39%	82
Male	61%	117

Marital Status		
	CA Traveler Target	Index
Married	50%	105
Single	27%	105

Family Status		
	CA Traveler Target	Index
Children <18	38%	137

Age		
	CA Traveler Target	Index
Age 16-24	13%	112
Age 25-34	22%	96
Age 35-44	29%	131
Age 45-54	16%	127
Age 55+	20%	65

Generation		
	CA Traveler Target	Index
Gen Z	11%	104
Millennial	46%	111
Gen X	28%	122
Baby Boomer	14%	61

Income*		
	CA Traveler Target	Index
Higher income	49%	134
Middle income	26%	84
Lower income	12%	66
Prefer not to say	12%	93

Region		
	CA Traveler Target	Index
New South Wales	38%	114
Victoria	29%	106
Queensland	18%	94
Western Australia	7%	63
South Australia	5%	90
Northern Territory	2%	187
Australian Capital	1%	51
Tasmania	1%	48

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



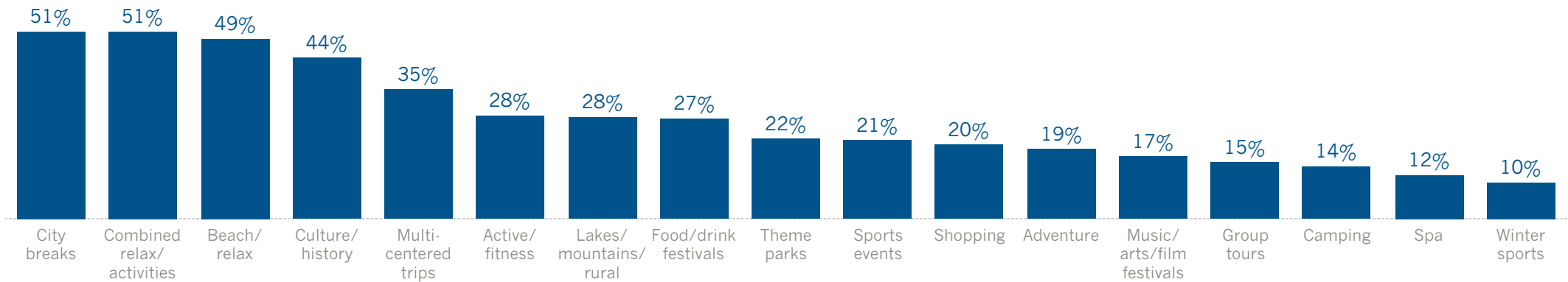
Int'l leisure travelers
considering California
"CA Traveler Target"

Trip Preferences/Characteristics

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

Australia

Trip Type



Traveler Type

	CA Traveler Target	Index
Budget	43%	105
Adventurous	14%	112
Responsible	13%	107
Luxury	10%	90
All-inclusive	8%	82

Travel Party (from most recent vacation)

	CA Traveler Target	Index
My partner	62%	106
My children	37%	129
Friend(s)	22%	98
Other family	19%	117
Solo	14%	107
Other person(s)	3%	163

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)



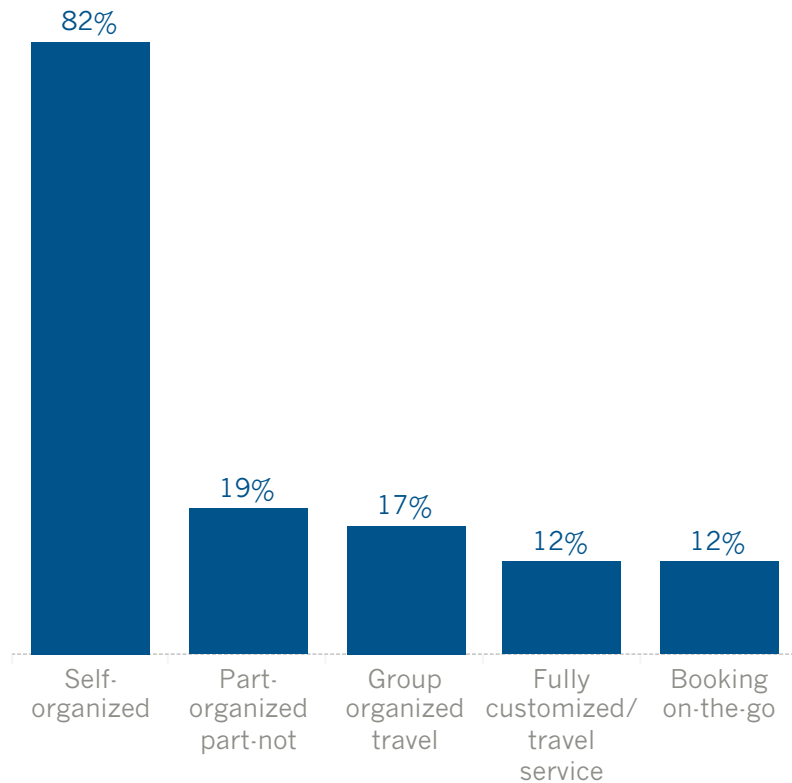
Int'l leisure travelers
considering California
"CA Traveler Target"

Organizing/Planning Methods

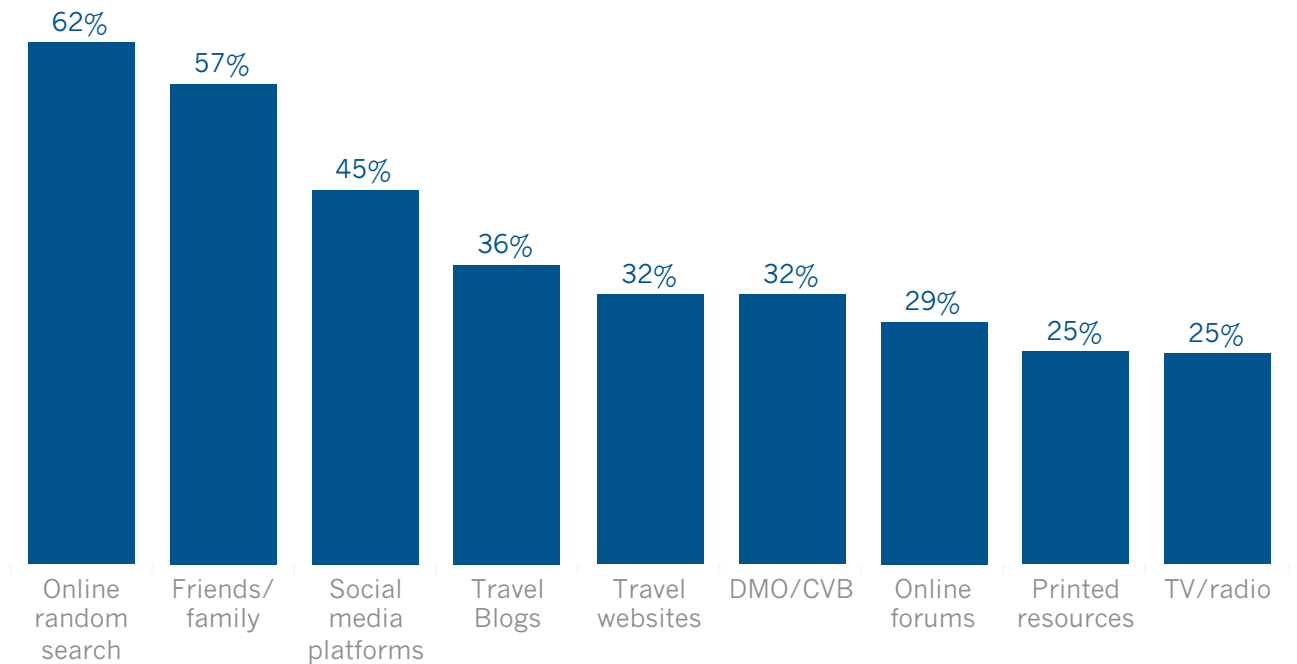
The chart below shows the organizing and planning methods of of the consumer target in the focus market.

Australia

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)



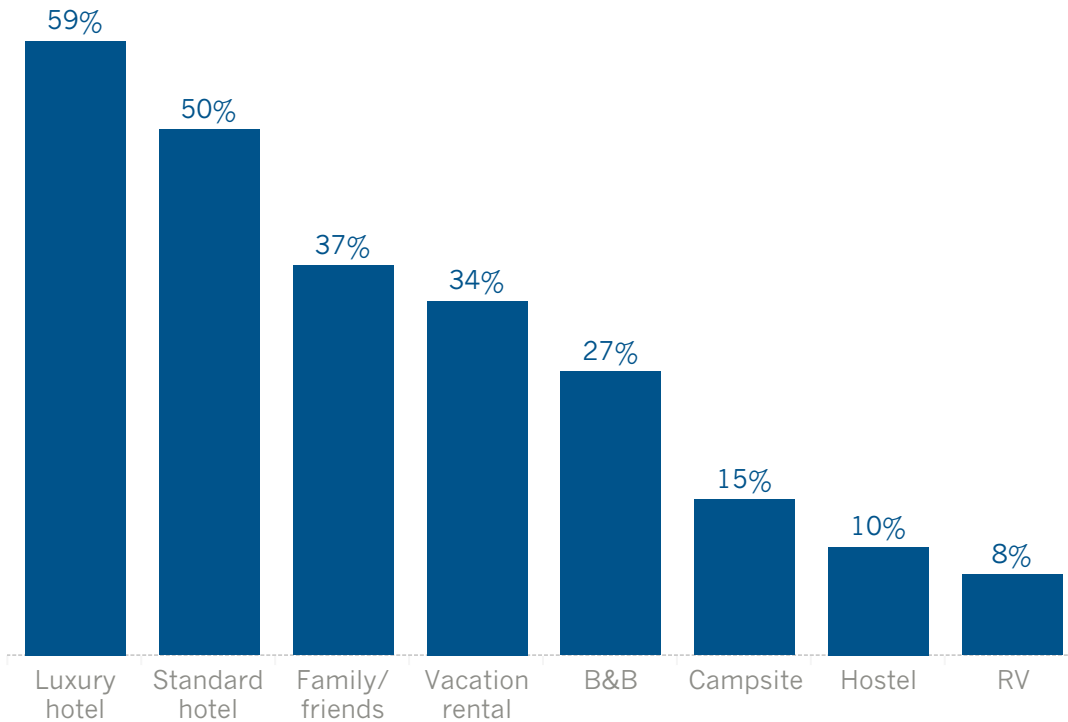
Int'l leisure travelers
considering California
"CA Traveler Target"

Booking Preferences

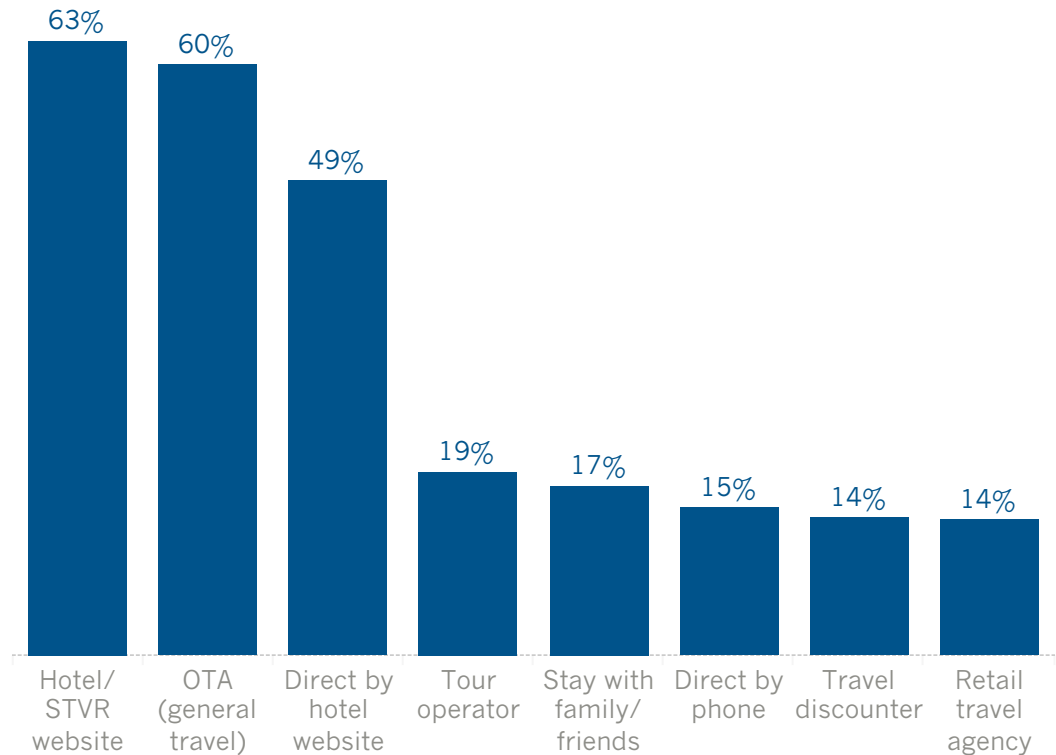
The chart below shows the accommodation preferences of of the consumer target in the focus market.

Australia

Accommodation Preferences



Booking Preferences



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?



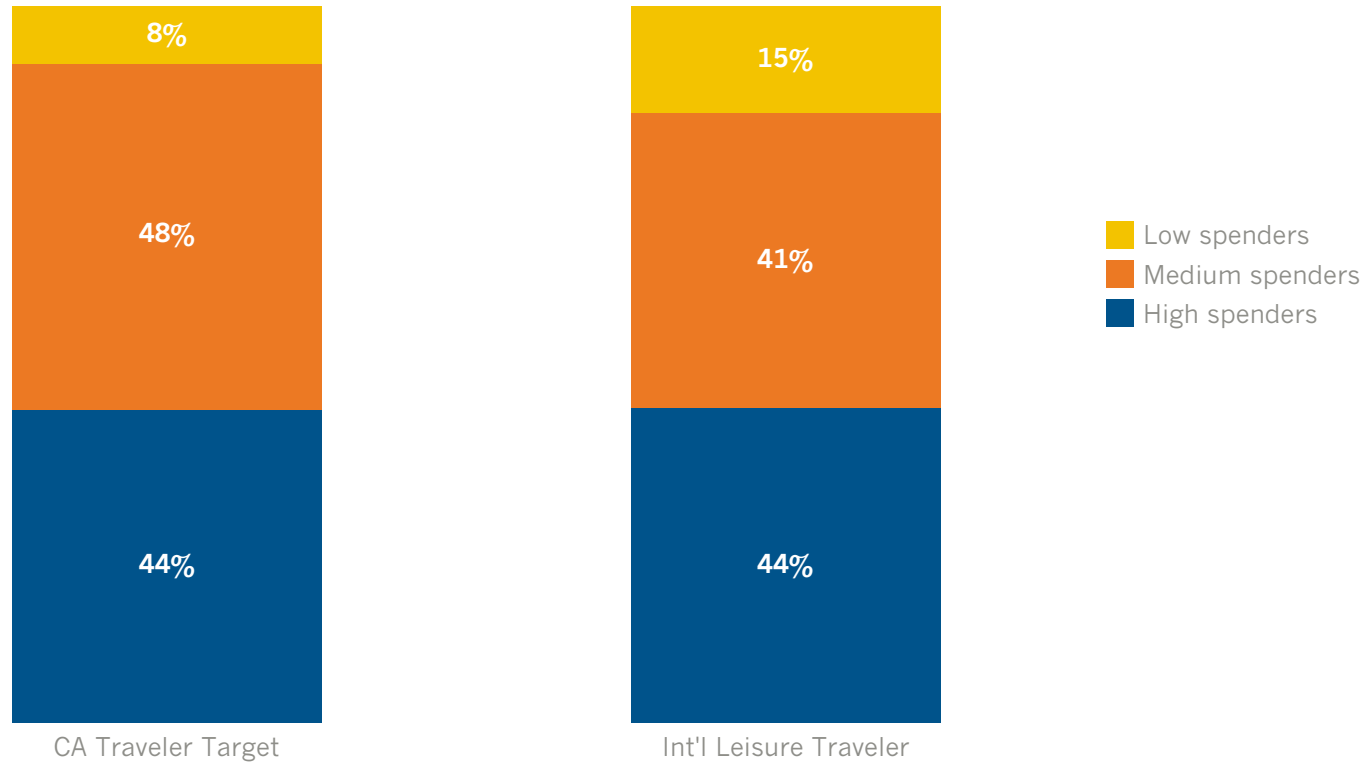
Int'l leisure travelers
considering California
"CA Traveler Target"

Travel Spending

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

Australia

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.

Australia

Advertising Influences

	CA Traveler Target	Index
Social media	56%	121
Travel websites	50%	125
TV - Free to view channels	42%	131
Online streaming services	40%	144
Cinema	32%	142
Billboards	32%	141
Magazines (digital)	29%	163
TV - paid/subscription	26%	168
Direct mail	25%	131
Podcast	25%	173
Public transport	24%	149
National newspaper (digital)	23%	160
Radio	21%	126
Magazines (physical)	21%	151
Local newspaper (digital)	19%	131
Local newspaper (physical)	18%	134
National newspaper (physical)	18%	153

Sports Watched/Followed

	CA Traveler Target	Index
Tennis	36%	128
Australian Rules Football	36%	121
Soccer/Football	33%	137
Rugby League	23%	123
Cricket	23%	103
Basketball	23%	153
Swimming	22%	108
NFL	19%	202
Golf	13%	135
Boxing	12%	145
Cycling	12%	138
Volleyball	12%	207
Running/Marathon	11%	135
Baseball	10%	174
Ice Hockey	10%	189
Horse Racing	10%	139
Gymnastics	10%	122
Athletics/Track & Field	9%	124
Surfing	9%	139

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 (July 2023 to June 2024)



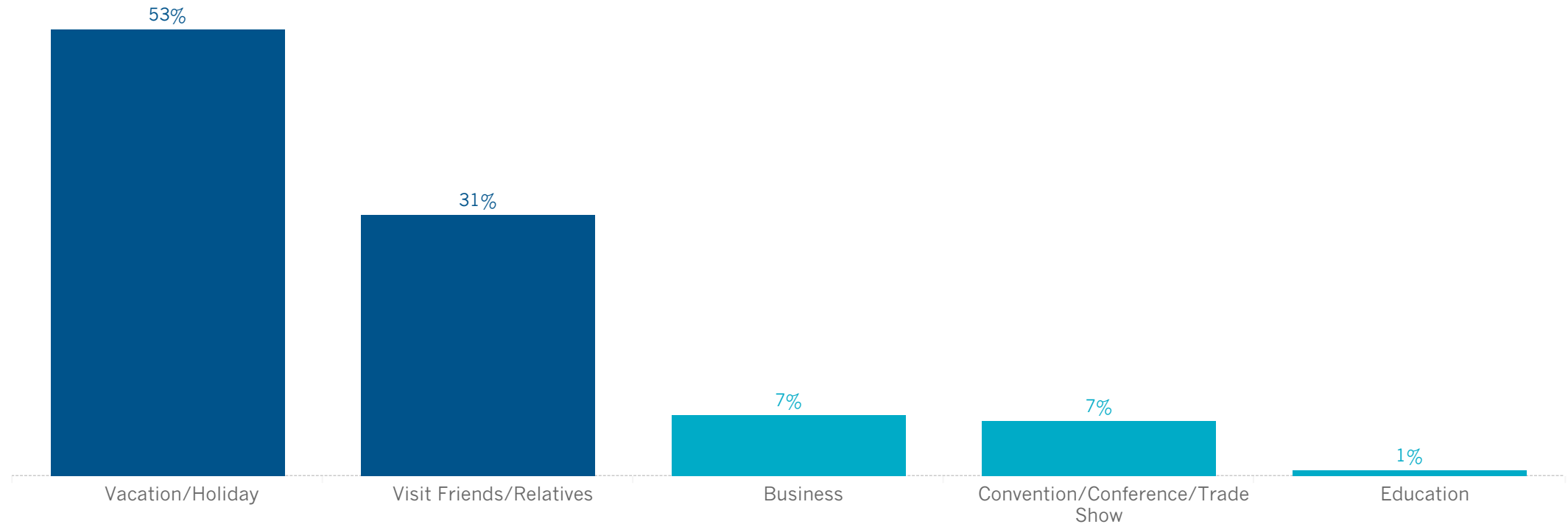
California Travelers & California Trip Characteristics

Main Purpose of Trip

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

Australia

Main Purpose of Trip

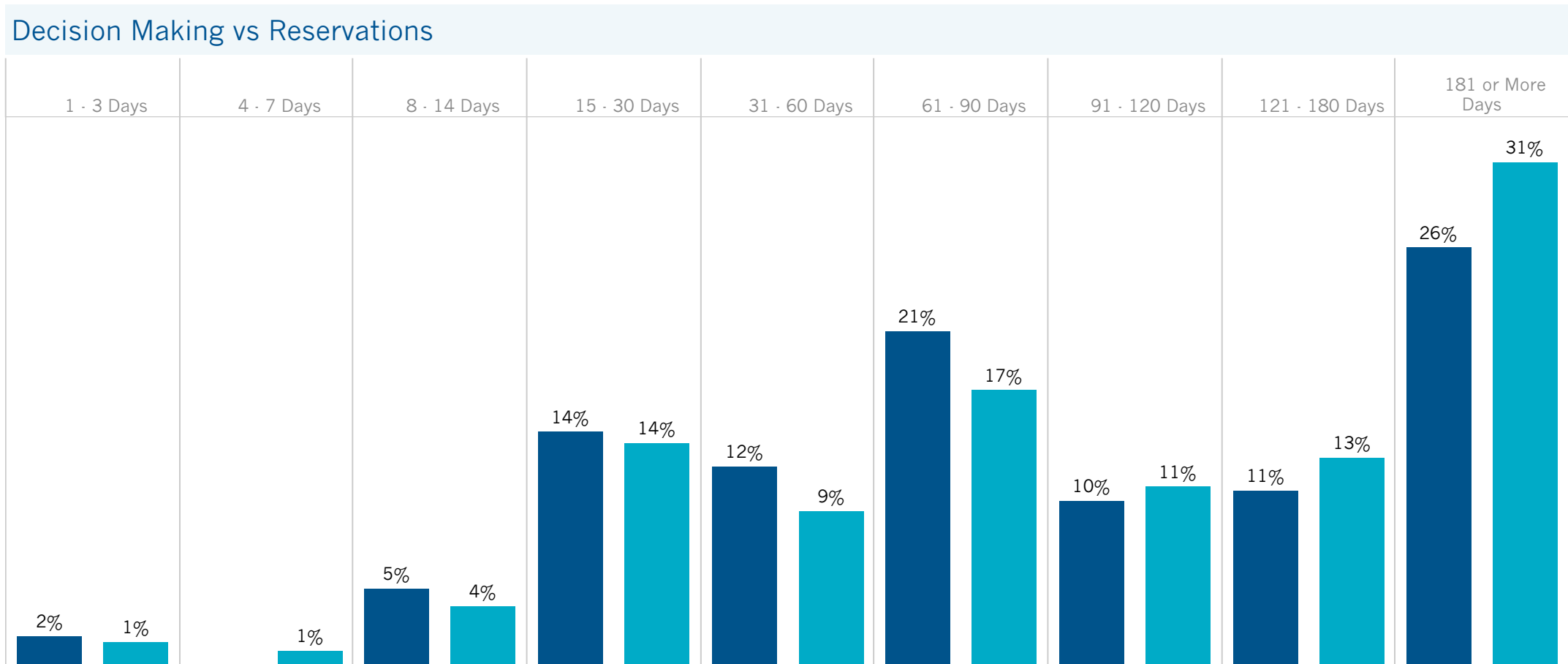




Decision Making vs Reservations

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

Australia



■ How many days prior to departure did you make air travel reservations? (%)

■ How many days prior to departure did you make the decision to travel? (%)

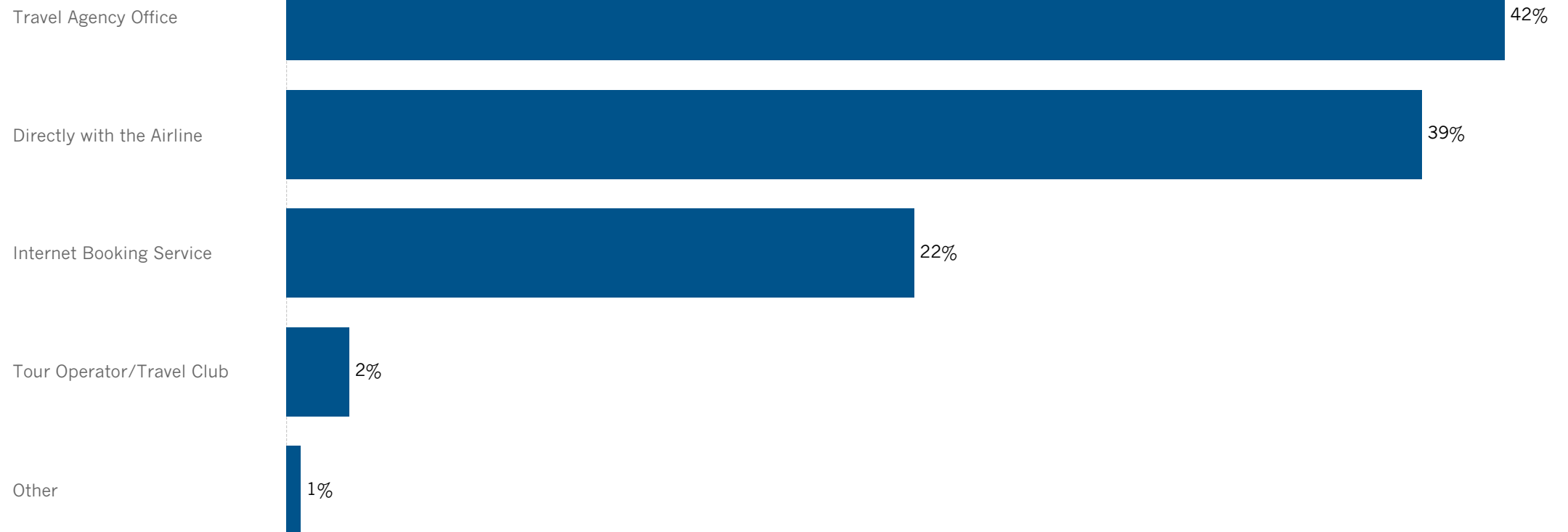


Airline Reservations

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

Australia

Airline Reservations



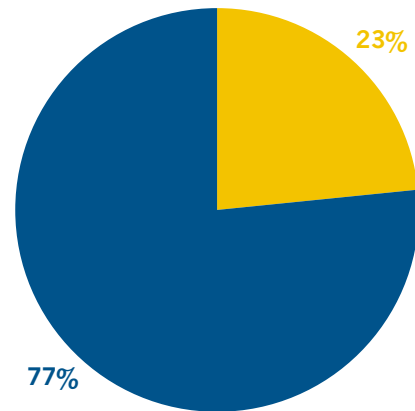


First/Repeat Visitation, Travel Party Size

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

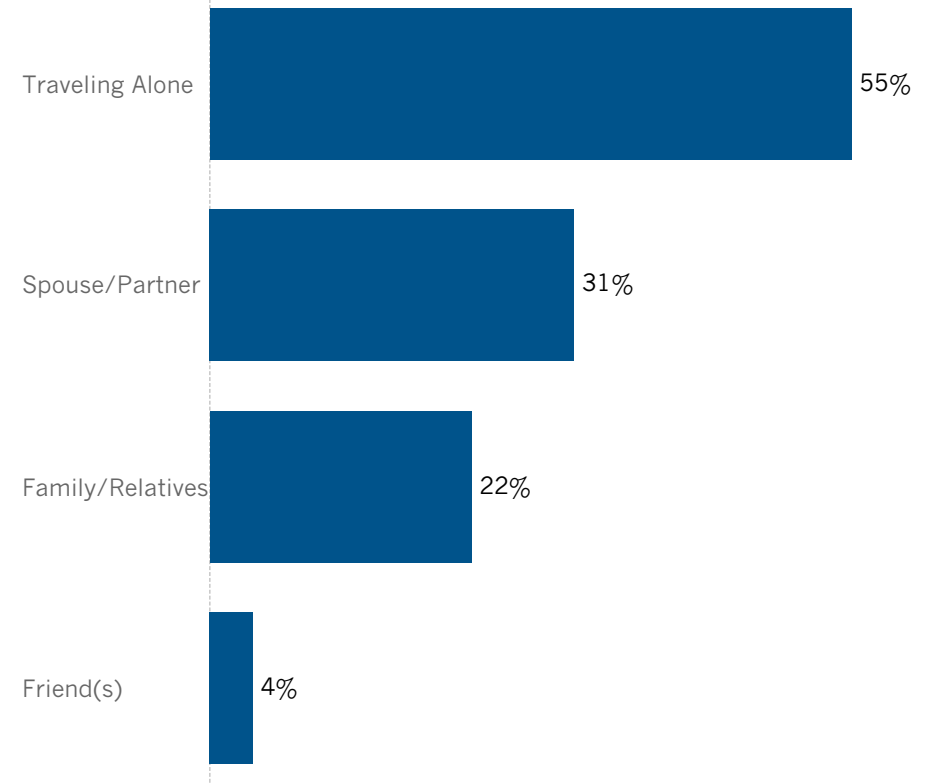
Australia

First trip to the US



Yes
No

Travel Companion



Q. Is this your first trip by air to the US?
Q. With whom are you travelling now?

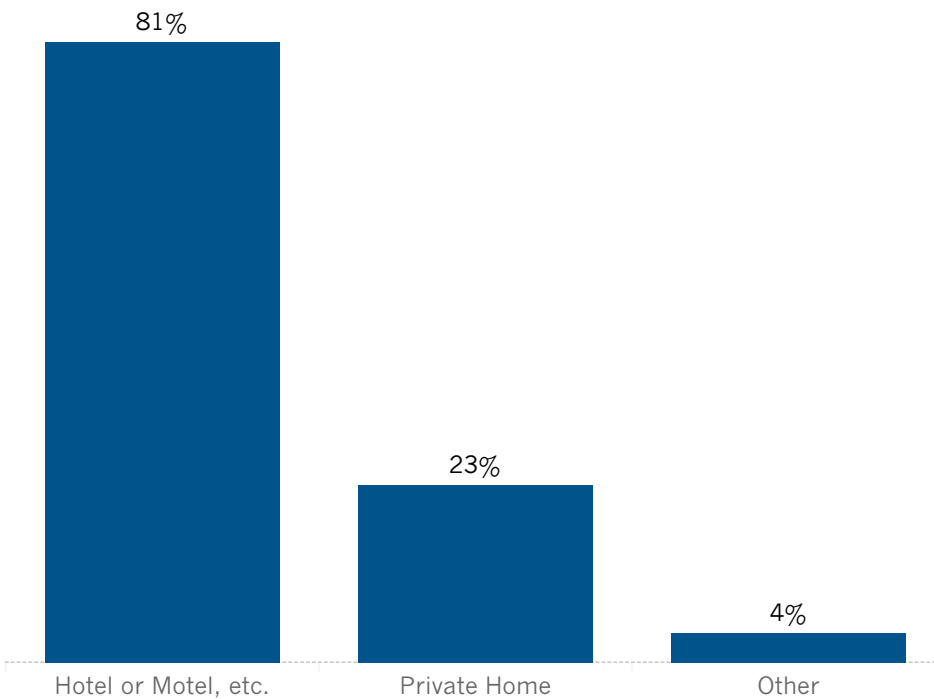


Types of Accommodations & Nights

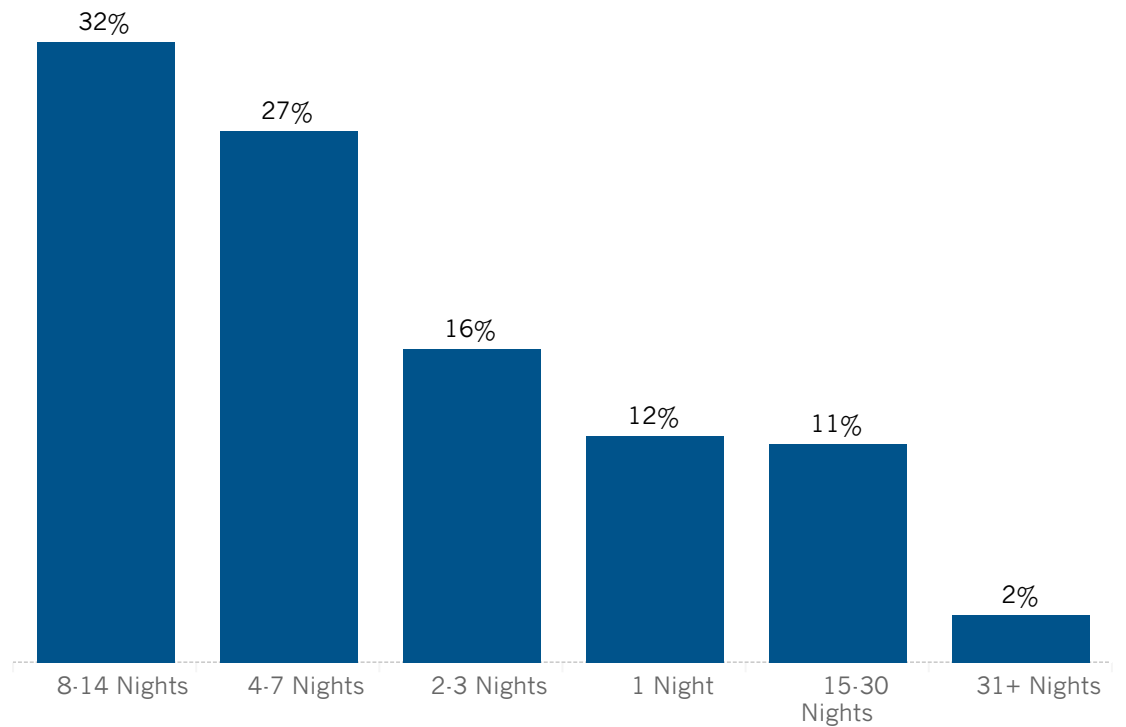
The charts below show types of accommodations stayed in and number of nights in destination among travelers from the focus market.

Australia

Types of Accommodations



Nights in Destination



Q. Type of accommodations in the destination
Q. Overall nights in destination

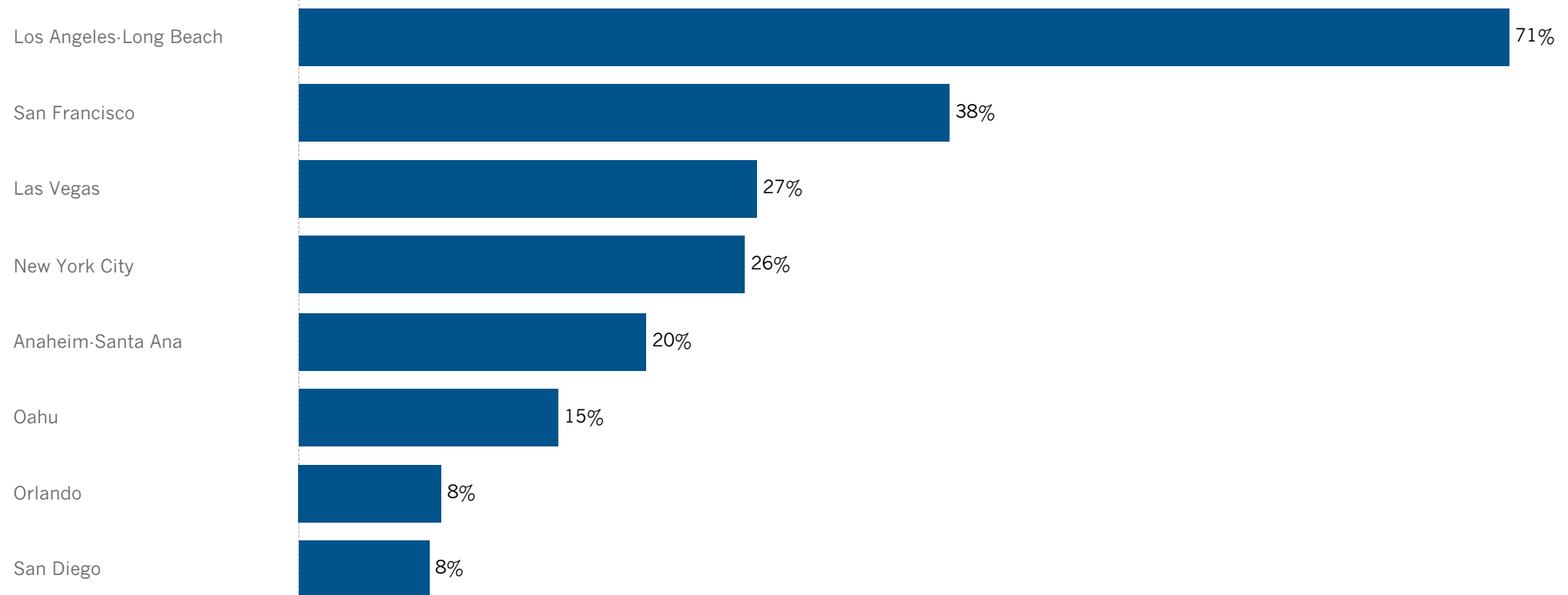


Destinations Visited

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

Australia

US Destinations visited



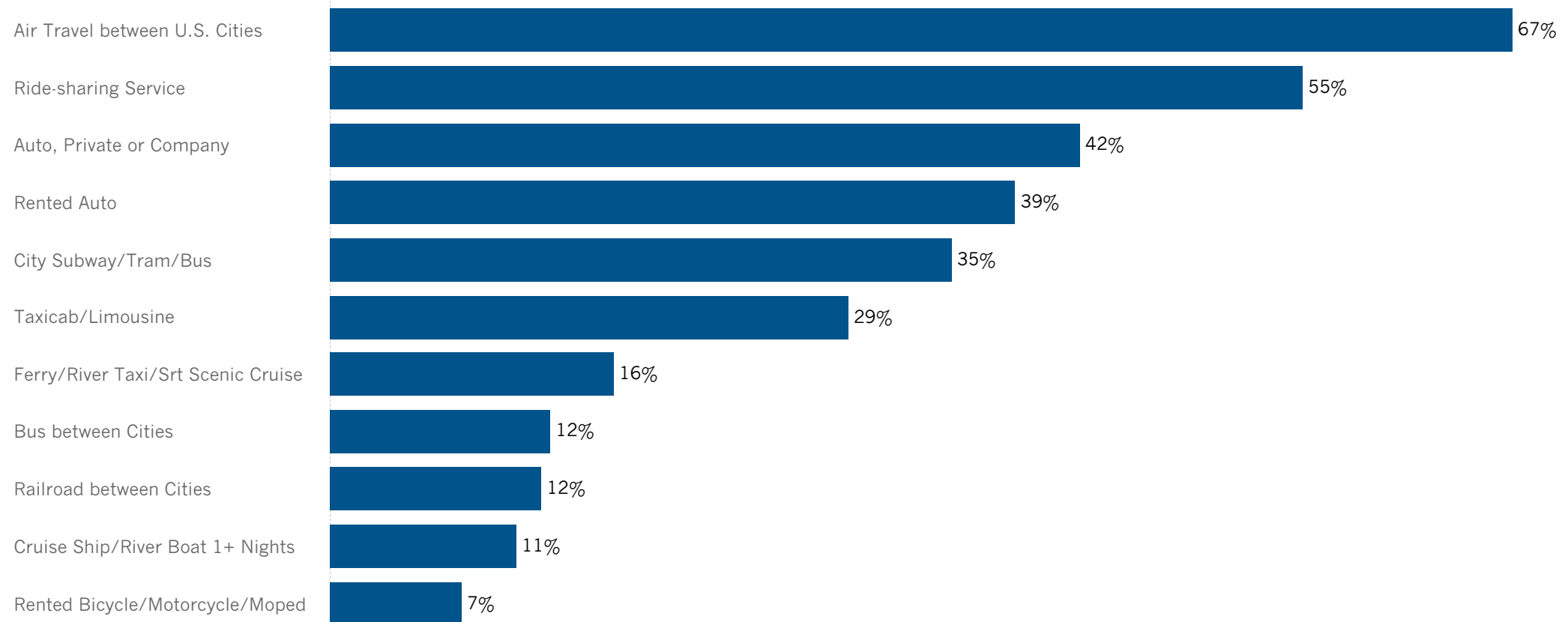


Transportation

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

Australia

Types of Transportation



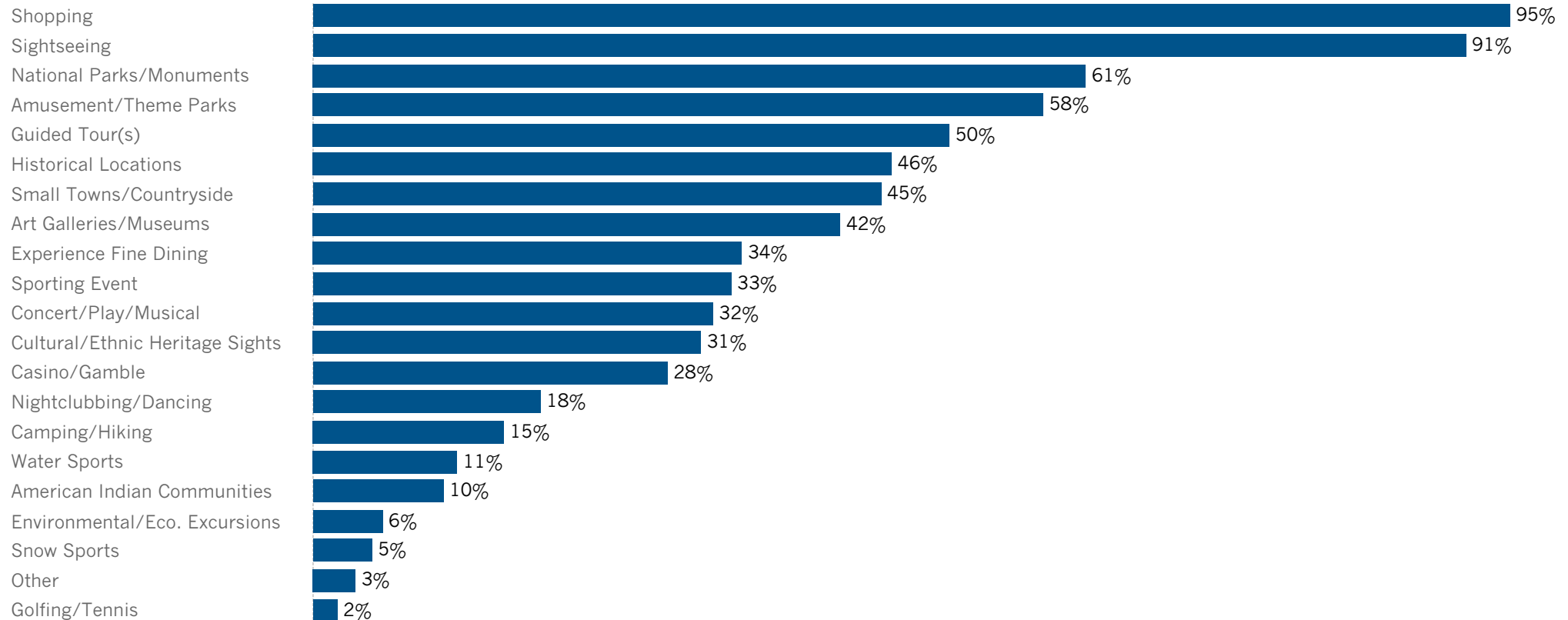


Activities

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

Australia

Engaged Activities





Expenditures in the US

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

Australia

Expenditures per visitor

