

Global Market Profile

FRANCE



February 2025

Introduction

- Tourism Economics forecasts that visitor spending in California will total \$166B in 2025, of which domestic leisure visitation will account for \$105B and international visitation will account for \$31B.
- 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 Insights:

- **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 Insights** 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 database 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 Insights** 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: *

66.5M

EXCHANGE RATE: **

Local currency to USD dollar

1.0

GROSS DOMESTIC PRODUCT (GDP):

Annual % chg ***

1.1%

INFLATION RATE:

Annual % chg ****

1.6%

* www.worldometers.info, 2025

** www.x-rates.com, 2025

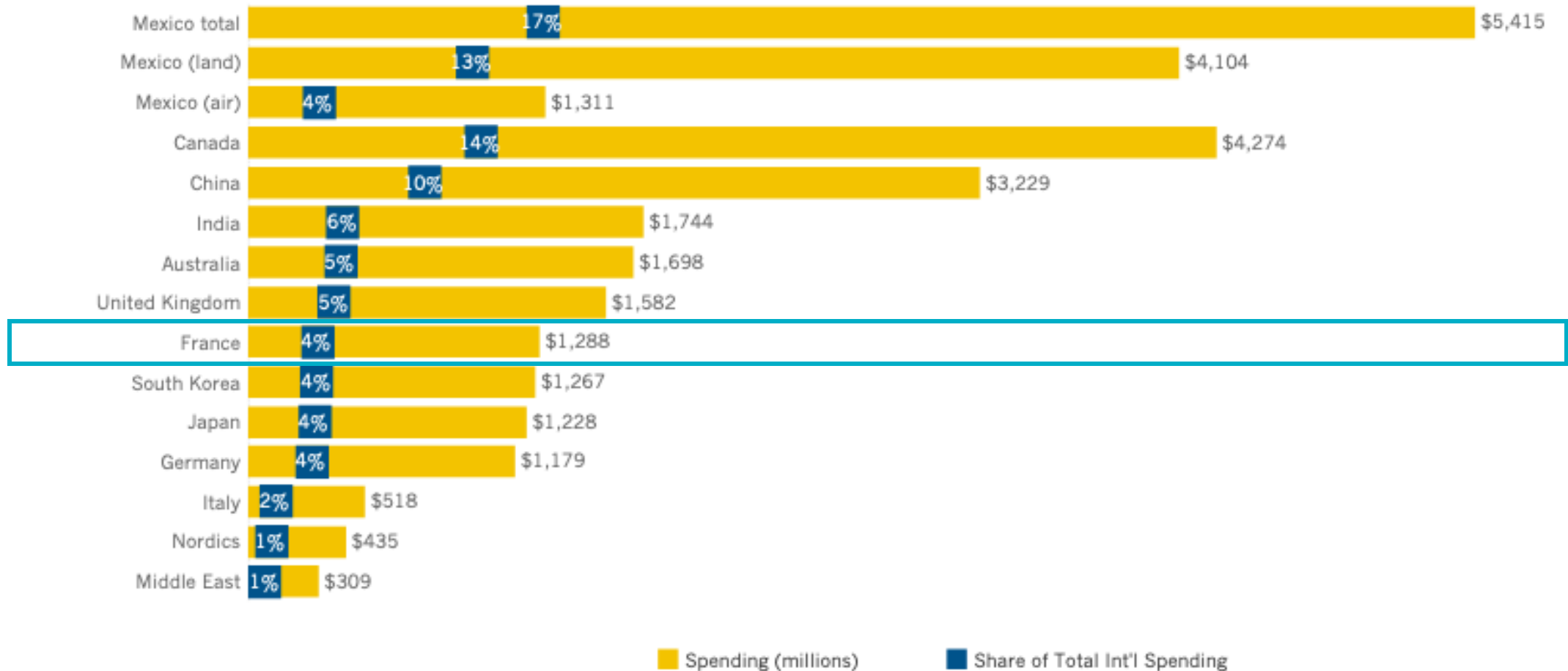
*** www.imf.org, Oct 2024

**** www.imf.org, Oct 2024

Forecast: Visitor Spending by Market (2025)

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.

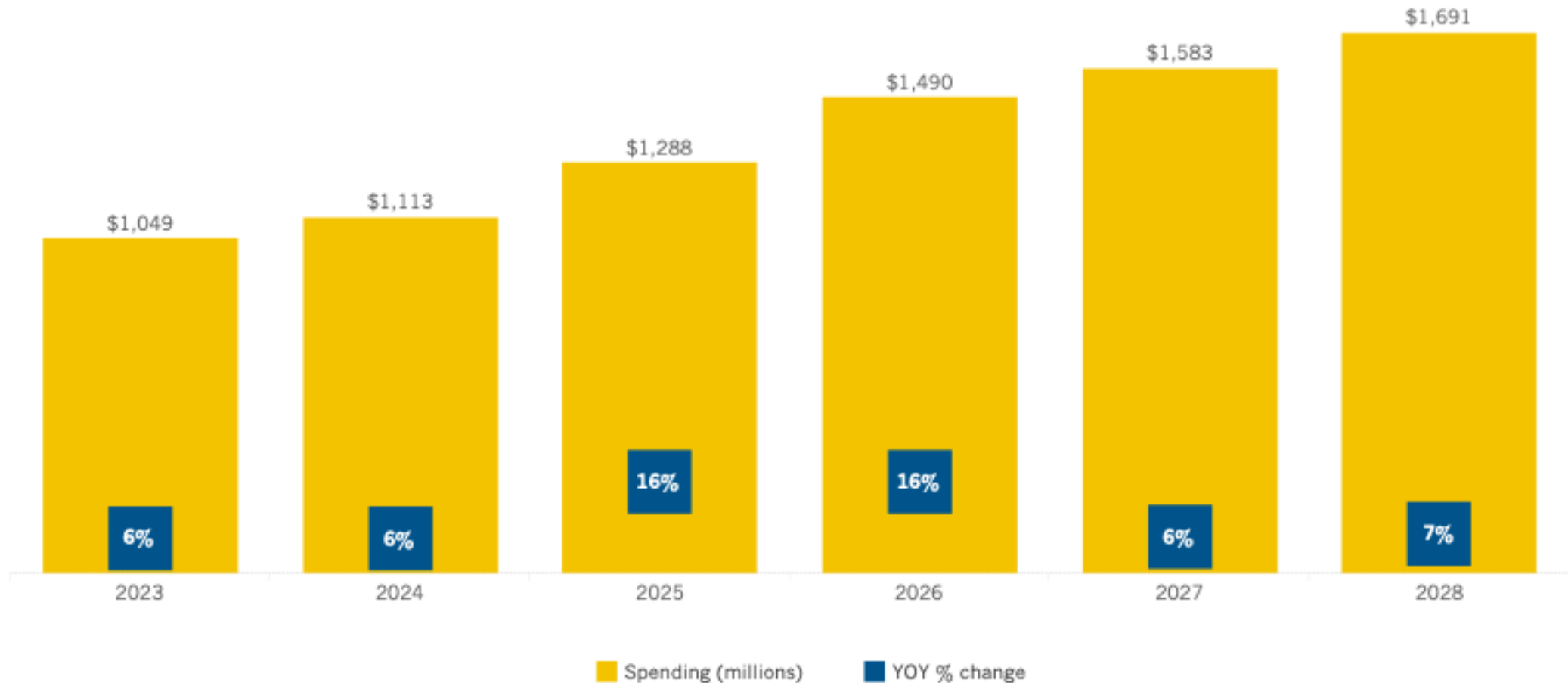
2025 Spending Forecast



Forecast: Visitor Spending

The chart below shows the state's visitor spending forecast and the YOY percent change for the focus market.

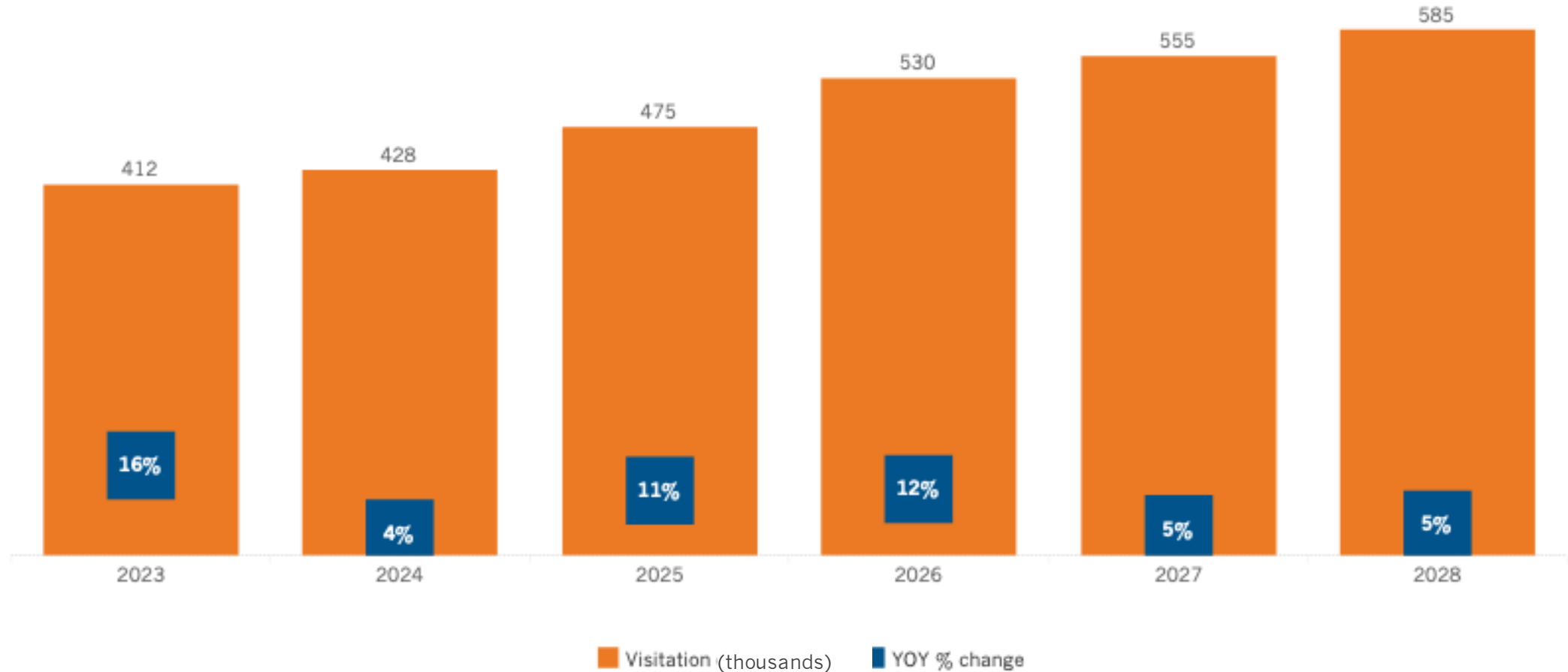
France: Spending Forecast and YOY % change



Forecast: Visitor Volume

The chart below shows the state's visitation forecast and the YOY percent change for the focus market.

France: Visitation Forecast and YOY % change



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 .

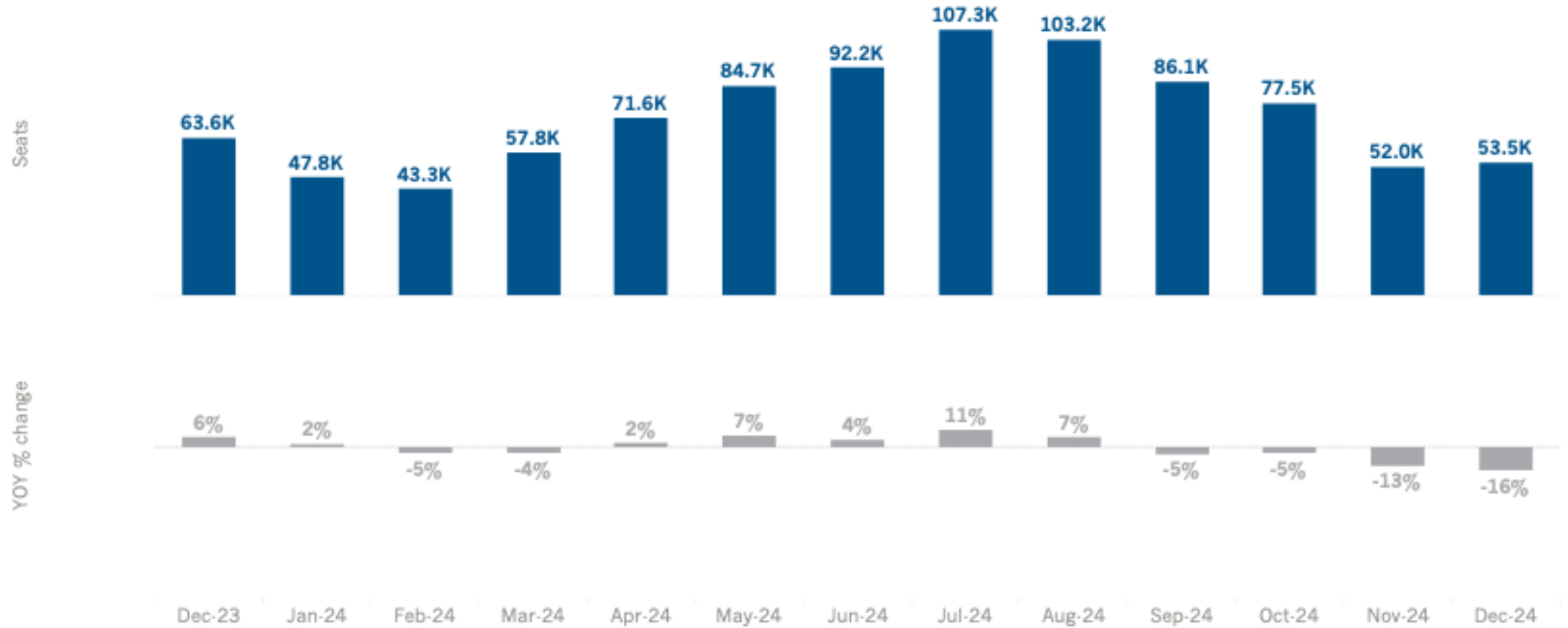
Region	Total International Visitor Spend (2023)		France Visitor Spend* (2023)		Index
	Spending (\$B)	%	Spending (\$B)	%	
Central Coast	\$0.828	3.7%	\$0.055	5.2%	143
Central Valley	\$0.278	1.2%	\$0.015	1.4%	114
Deserts	\$0.861	3.8%	\$0.029	2.8%	72
Gold Country	\$0.168	0.7%	\$0.006	0.6%	77
High Sierra	\$0.238	1.1%	\$0.027	2.6%	244
Inland Empire	\$0.308	1.4%	\$0.006	0.6%	45
Los Angeles	\$8.113	36.0%	\$0.450	42.9%	119
North Coast	\$0.037	0.2%	\$0.002	0.2%	99
Orange County	\$2.219	9.8%	\$0.045	4.3%	43
San Diego	\$3.062	13.6%	\$0.066	6.3%	47
San Francisco Bay Area	\$6.407	28.4%	\$0.347	33.1%	116
Shasta Cascade	\$0.030	0.1%	\$0.001	0.1%	67
Total California	\$22.549	100%	\$1.049	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.

Airlift to California

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

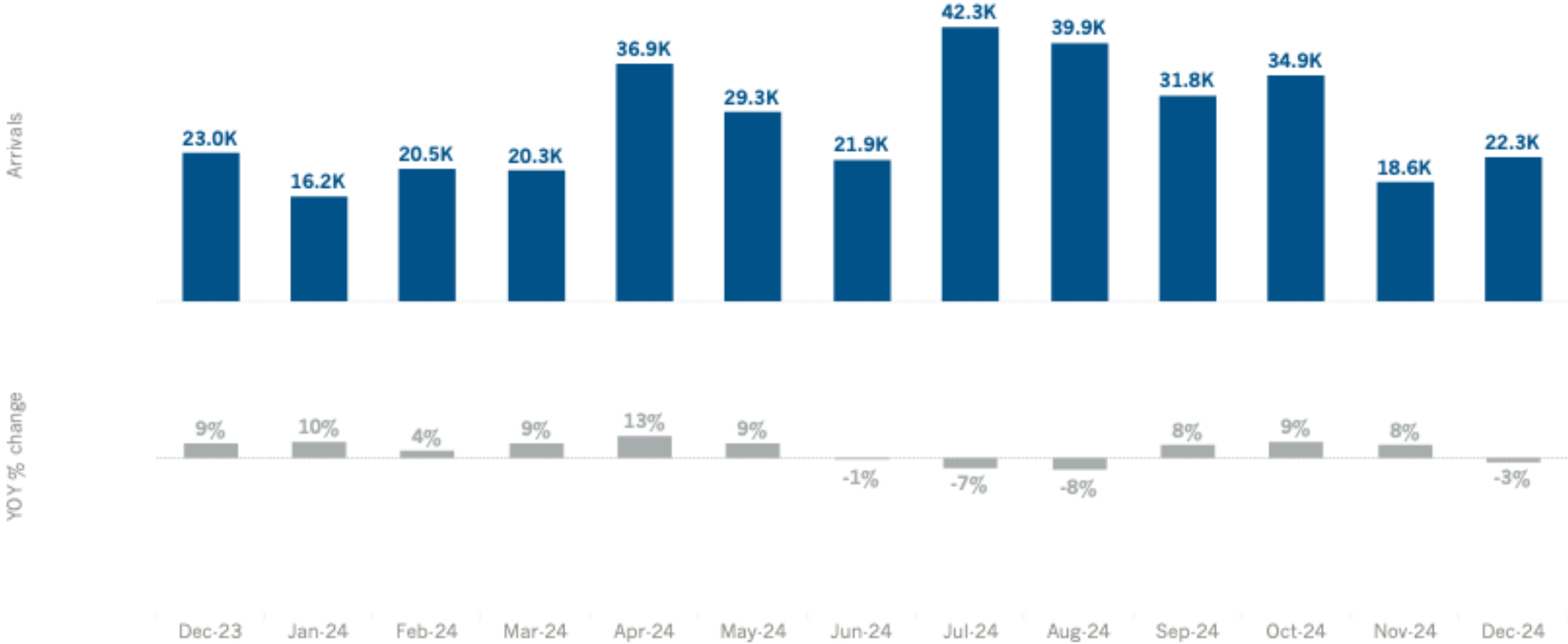
France: Non-Stop Seats



Non-Resident Arrivals to California

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

France: Non-Resident Arrivals at Ports of Entry



Source: NTT/CIC Research

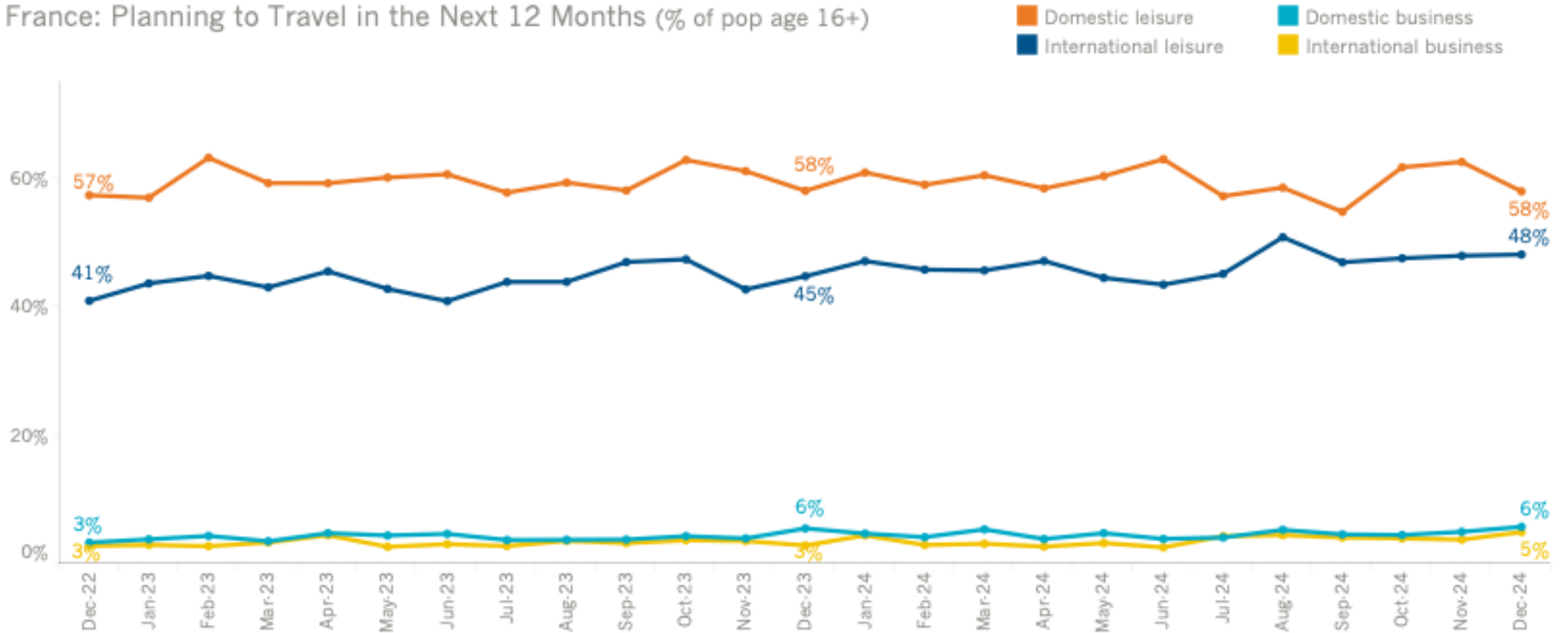
California's Int'l Market Share (Visits)

	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.

France: 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 2024

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.

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 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.

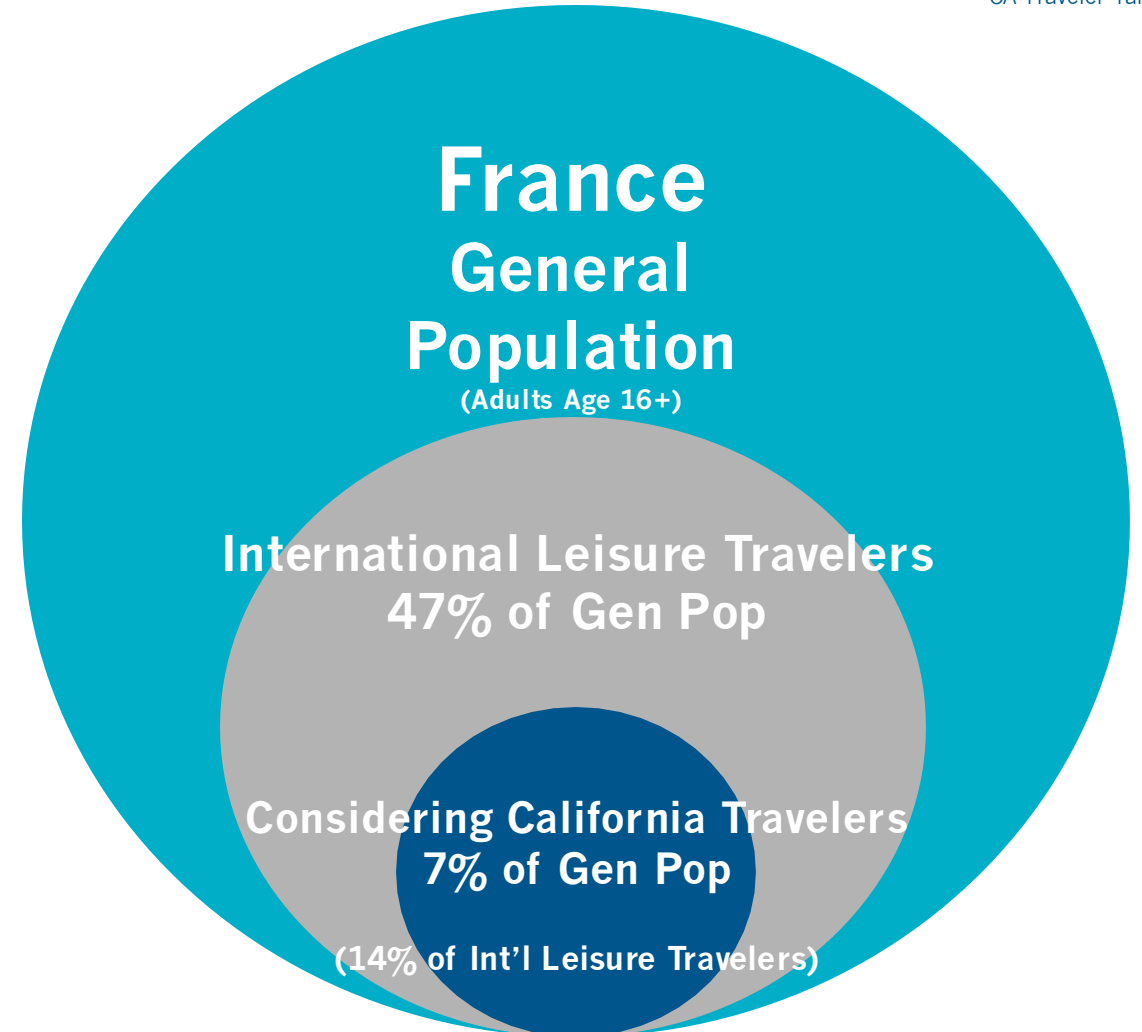
Definitions:

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.



Demographic Profile

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

France

Gender		
	CA Traveler Target	Index
Female	44%	87
Male	56%	114

Marital Status		
	CA Traveler Target	Index
Married	40%	95
Single	26%	120

Family Status		
	CA Traveler Target	Index
Children <18	34%	114

Age		
	CA Traveler Target	Index
Age 16-24	12%	101
Age 25-34	21%	125
Age 35-44	21%	123
Age 45-54	18%	108
Age 55+	28%	75

Generation		
	CA Traveler Target	Index
Gen Z	12%	101
Millennial	37%	124
Gen X	30%	104
Baby Boomer	21%	71

Income*		
	CA Traveler Target	Index
Higher income	23%	142
Middle income	50%	92
Lower income	15%	91
Prefer not to say	12%	93

Region		
	CA Traveler Target	Index
Region Parisienne	28%	122
Nord-Est	23%	99
Sud-Est	19%	74
Nord-Ouest	17%	101
Sud-Ouest	13%	115



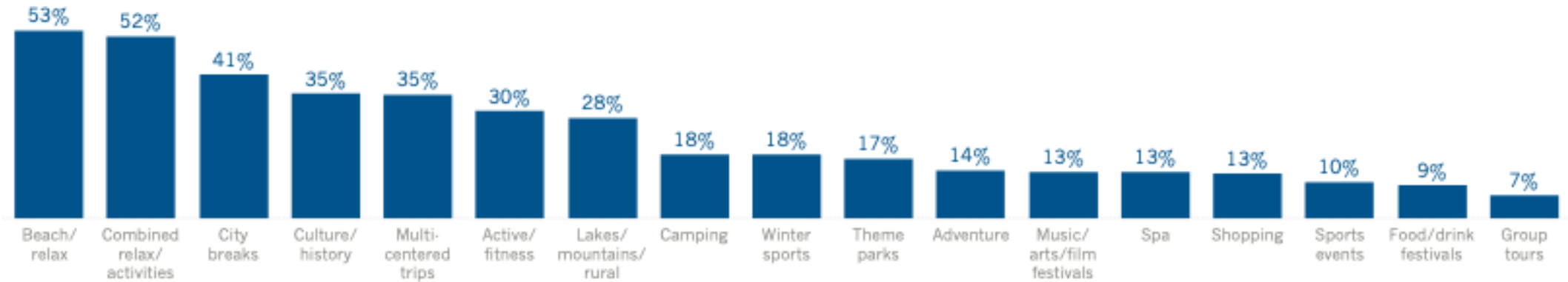
Int'l leisure travelers
considering
California
"CA Traveler Target"

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	45%	100
Adventurous	13%	112
Responsible	11%	98
All-inclusive	10%	94
Luxury	7%	109

Travel Party (from most recent vacation)

	CA Traveler Target	Index
My partner	66%	98
My children	37%	105
Friend(s)	22%	118
Other family	21%	117
Solo	9%	143
Other person(s)	4%	150

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 (2024)



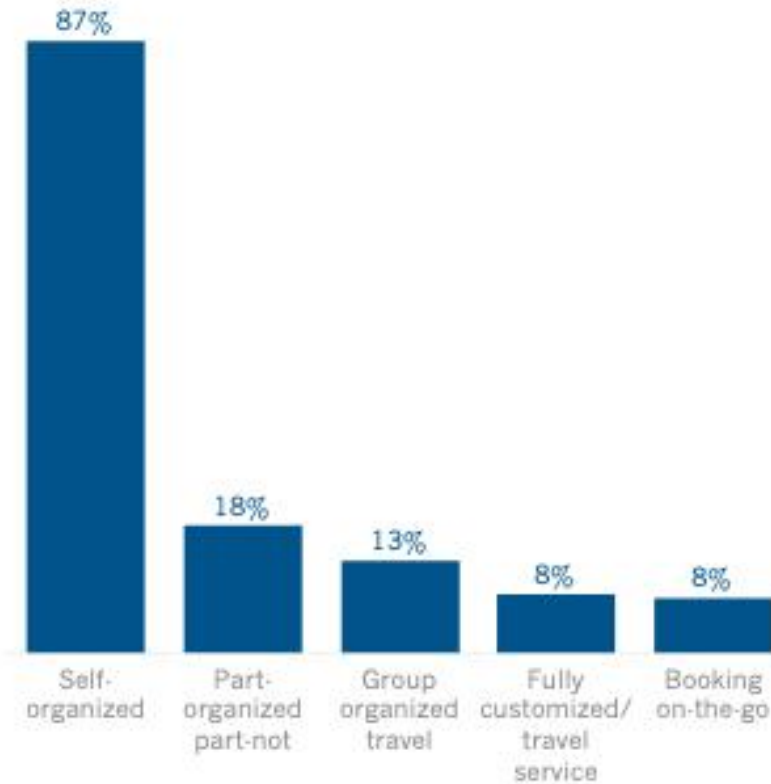
Int'l leisure travelers
considering
California
"CA Traveler Target"

Organizing/Planning Methods

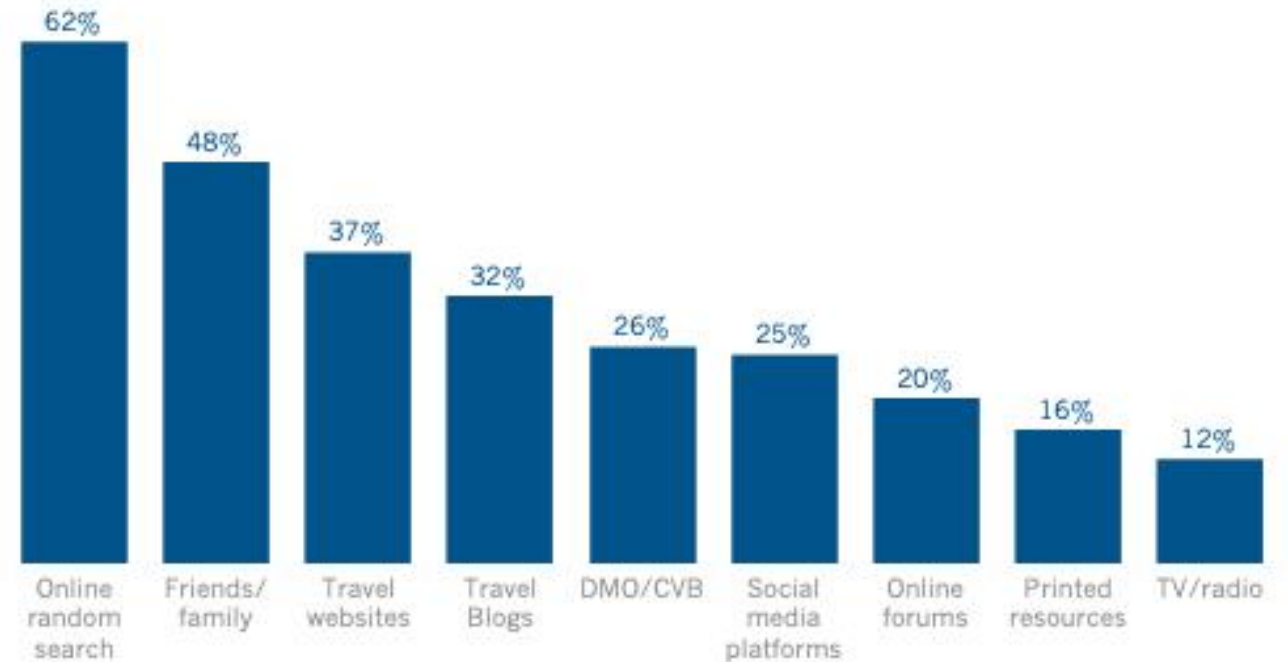
The chart below shows the organizing and planning methods of the consumer target in the focus market.

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 (2024)



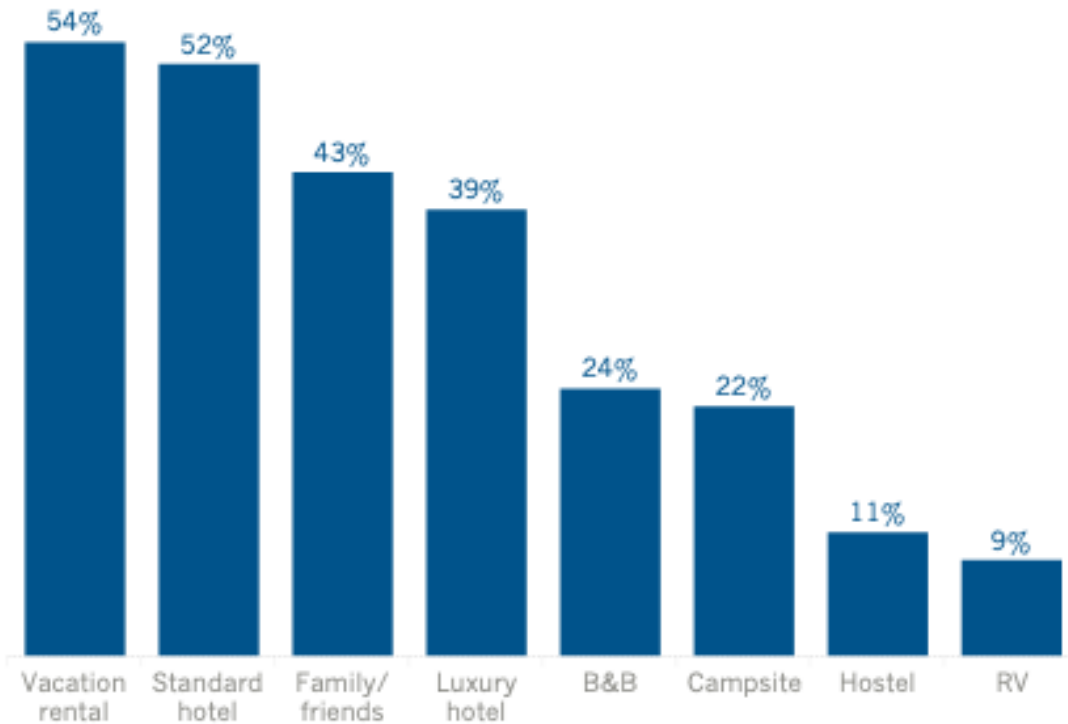
Int'l leisure travelers
considering
California
"CA Traveler Target"

Booking Preferences

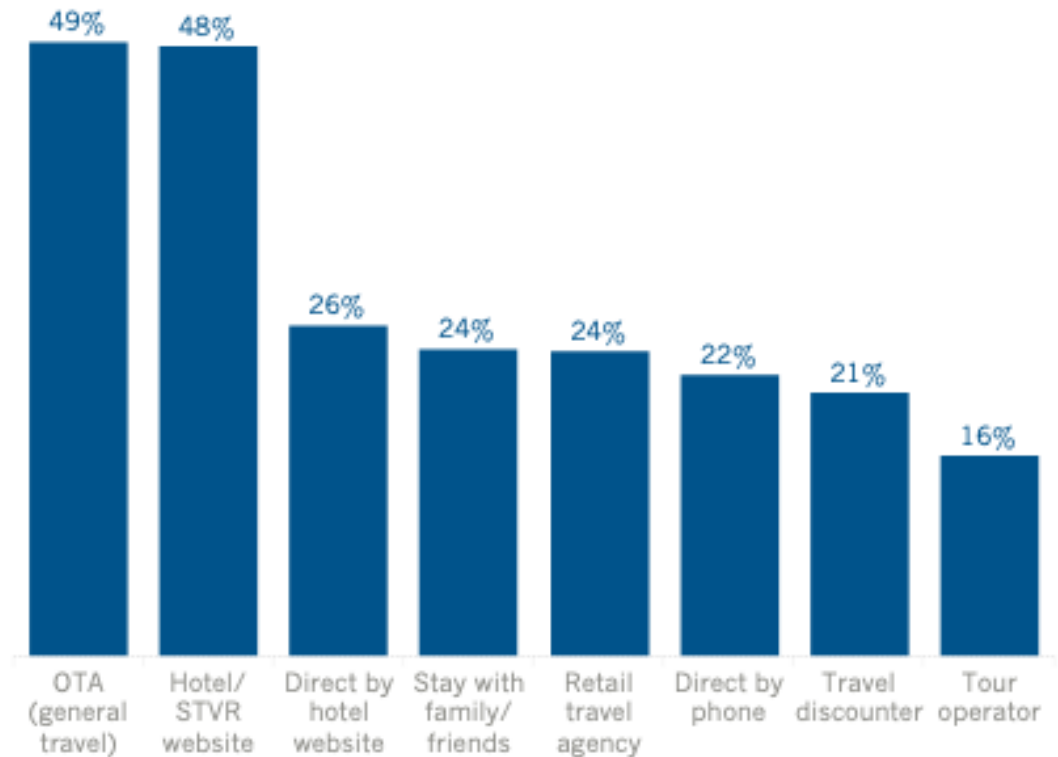
The chart below shows the accommodation preferences of the consumer target in the focus market.

France

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?



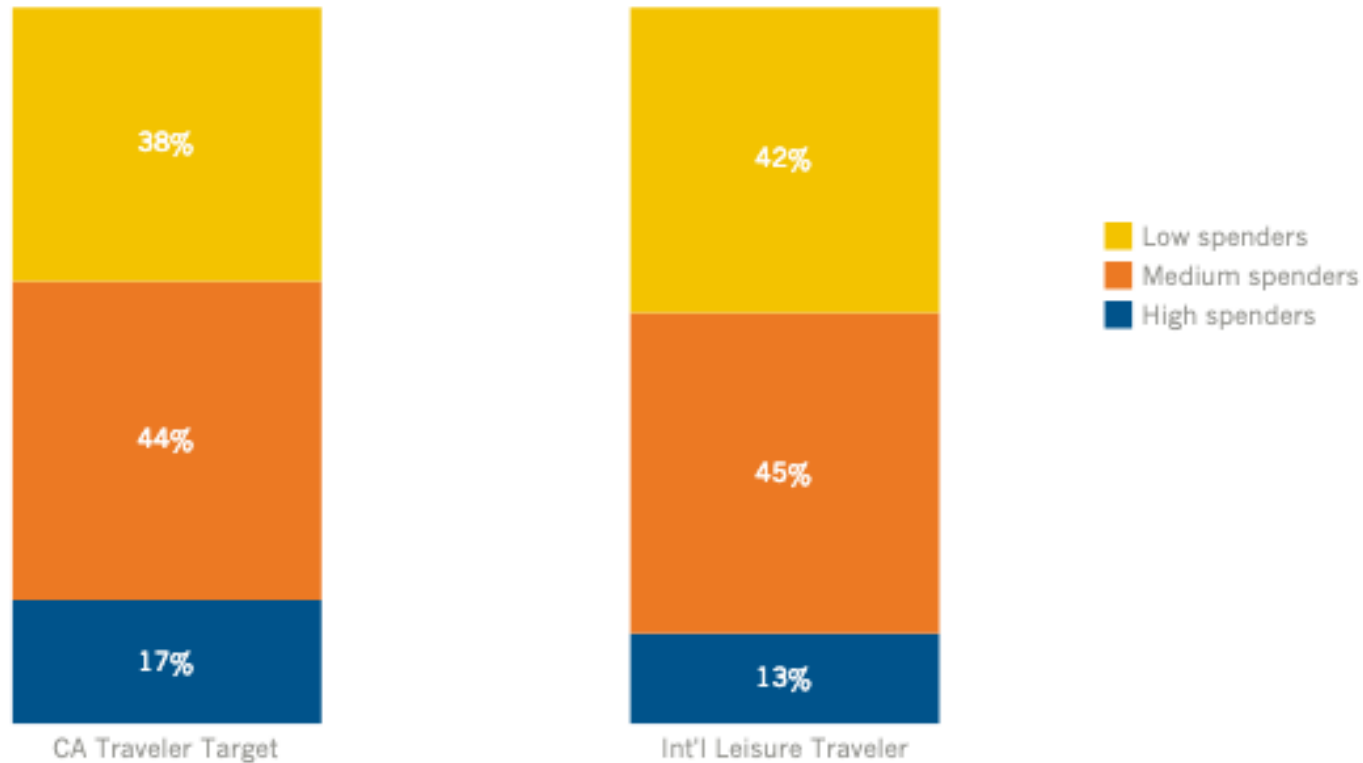
Int'l leisure travelers
considering
California
"CA Traveler Target"

Travel Spending

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

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
Social media	47%	110
Travel websites	47%	108
TV - Free to view channels	42%	128
Billboards	41%	139
Cinema	28%	134
Magazines (digital)	26%	144
Online streaming services	23%	148
Magazines (physical)	23%	131
Local newspaper (physical)	21%	155
Public transport	21%	157
National newspaper (digital)	21%	171
Radio	20%	117
Direct mail	20%	162
TV - paid/subscription	19%	169
Local newspaper (digital)	19%	142
National newspaper (physical)	15%	181
Podcast	14%	155

Sports Watched/Followed

	CA Traveler Target	Index
Tennis	39%	153
Soccer/Football	35%	125
Cycling	23%	124
Athletics/Track & Field	21%	121
Basketball	21%	148
Swimming	19%	137
Volleyball	12%	189
Gymnastics	12%	132
Boxing	11%	137
Running/Marathon	11%	148
Rugby League	9%	163
NFL	9%	224
Golf	8%	203
Horse Racing	6%	183
Ice Hockey	6%	191
Surfing	6%	215
Baseball	4%	184
Australian Rules Football	3%	267
Cricket	3%	349

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 (2024)



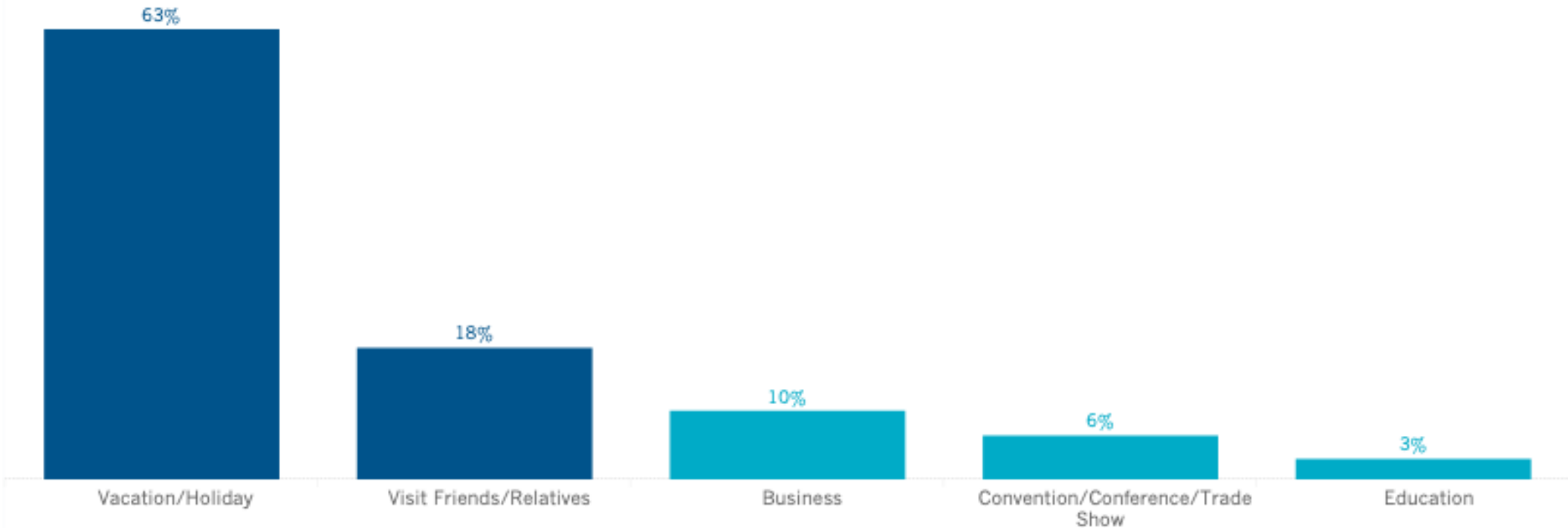
California Travelers & California Trip Insights

Main Purpose of Trip

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

France

Main Purpose of Trip

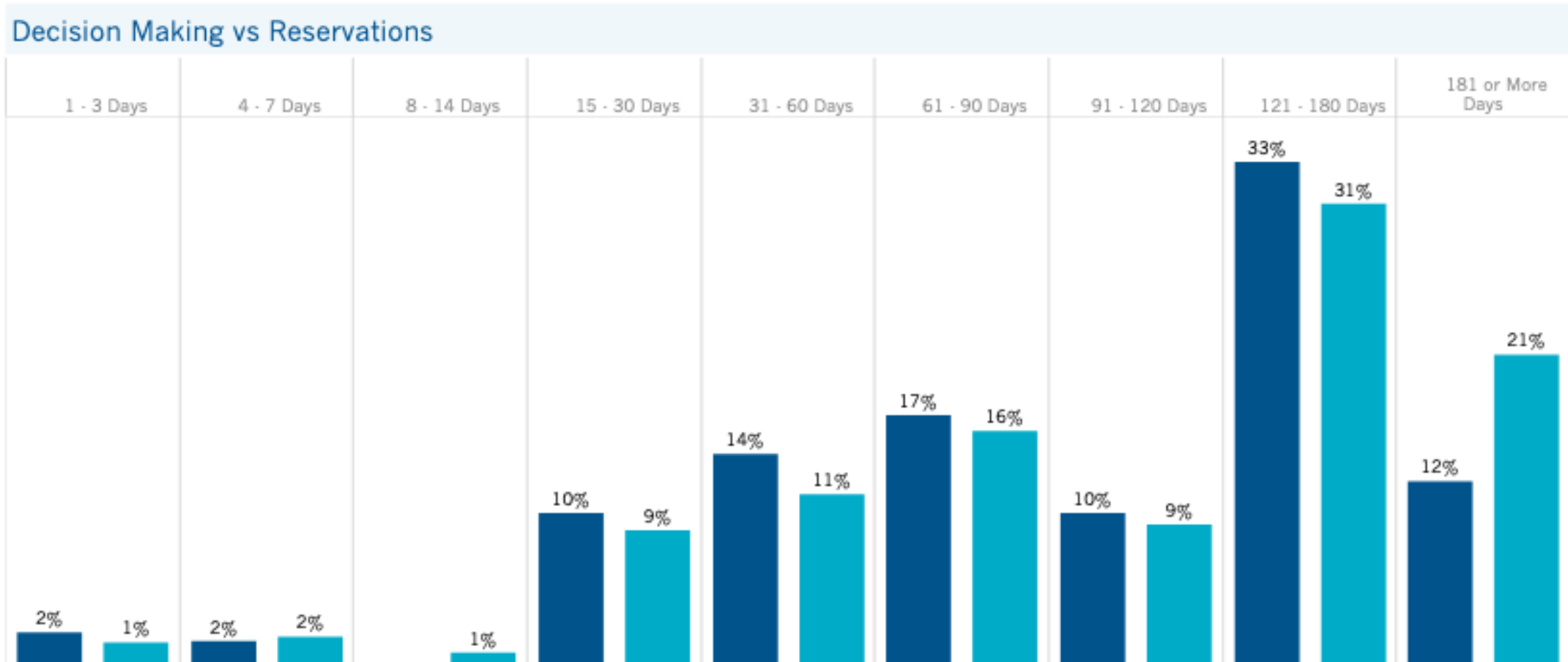




Decision Making vs Reservations

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

France



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

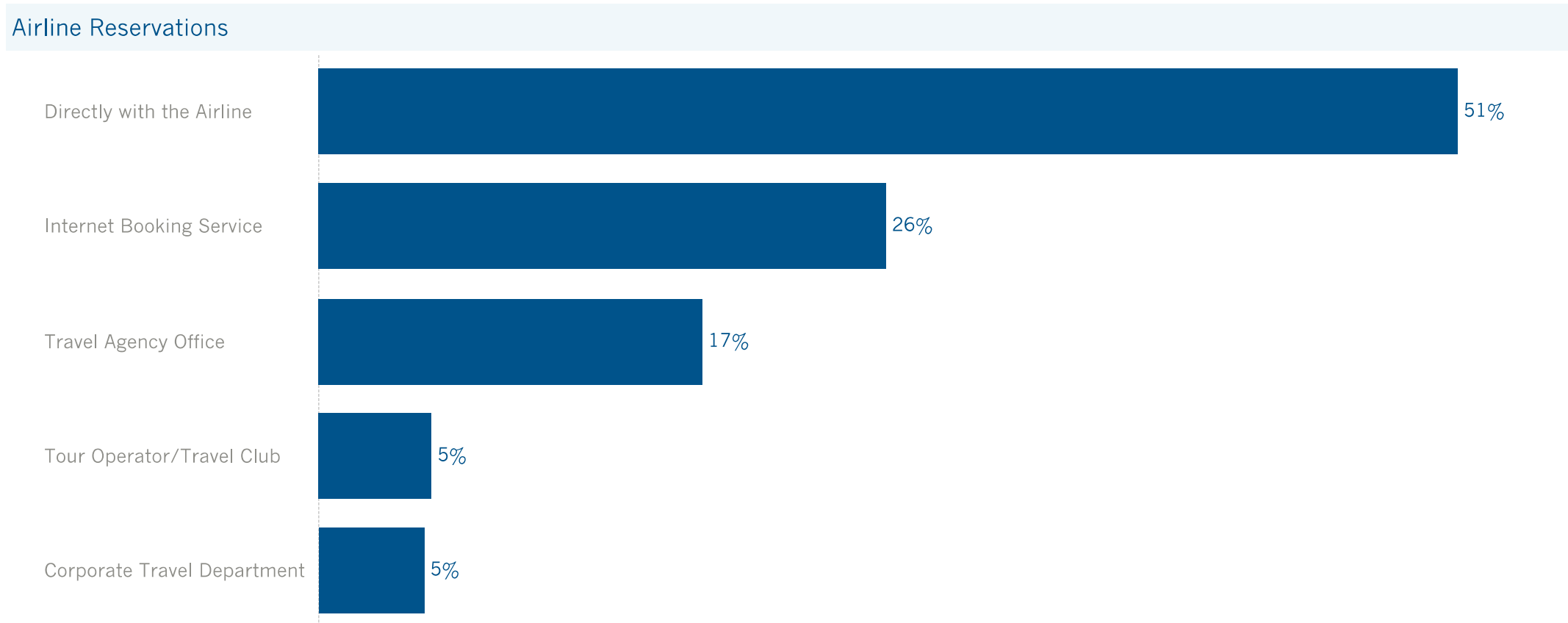
■ How many days prior to departure did you make the decision to travel? (%)



Airline Reservations

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

France



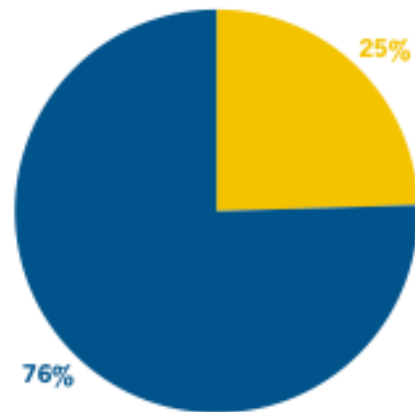


First/Repeat Visitation, Travel Party Size

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

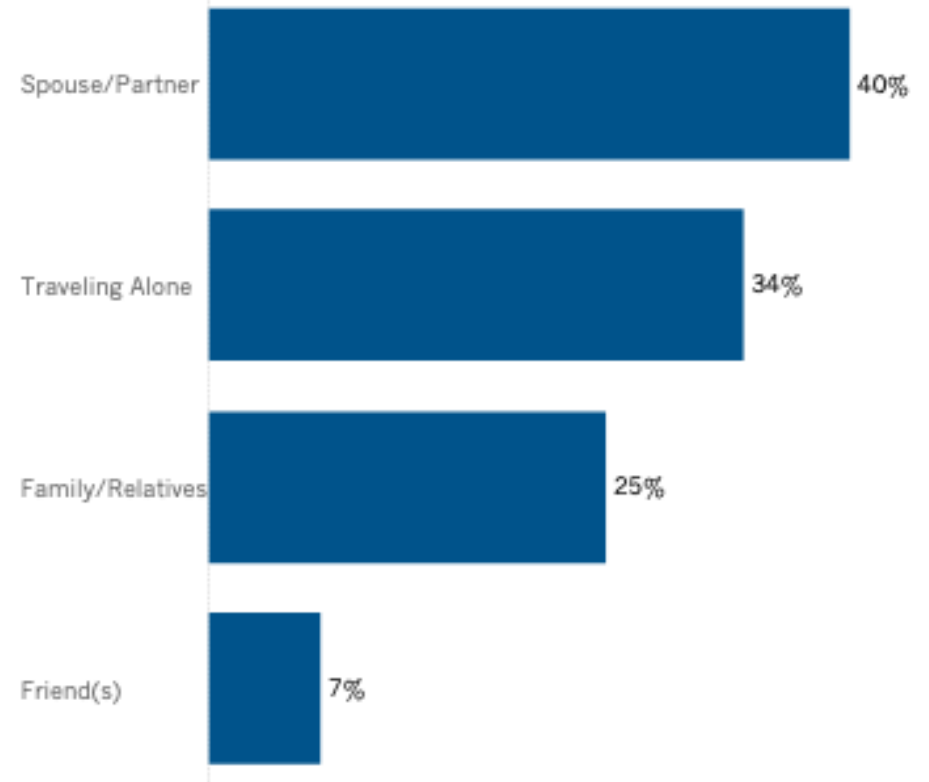
France

First trip to the US



■ Yes
■ No

Travel Companion



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

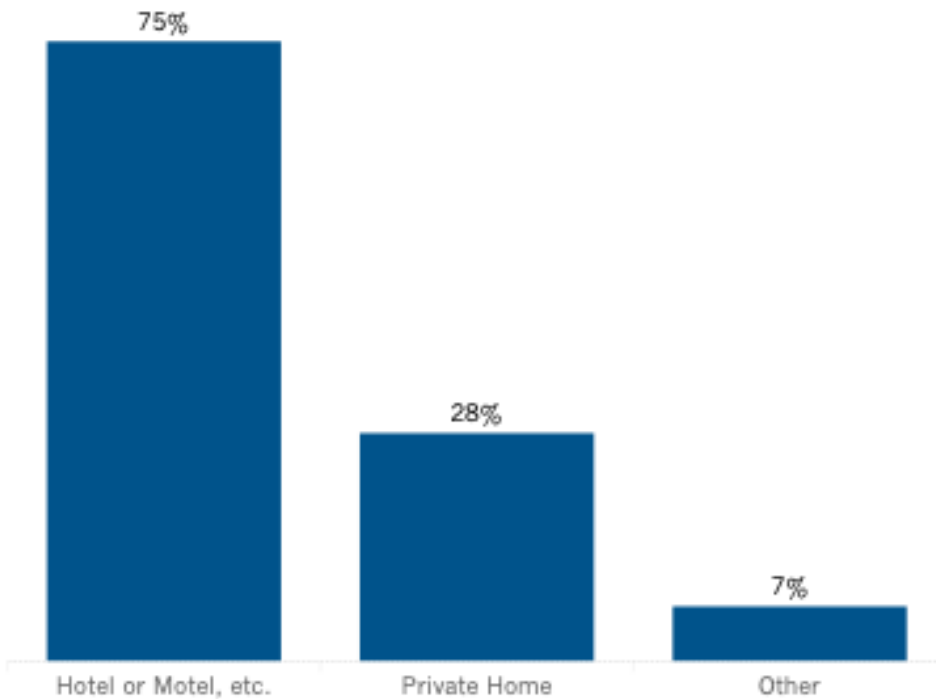


Types of Accommodations & Nights

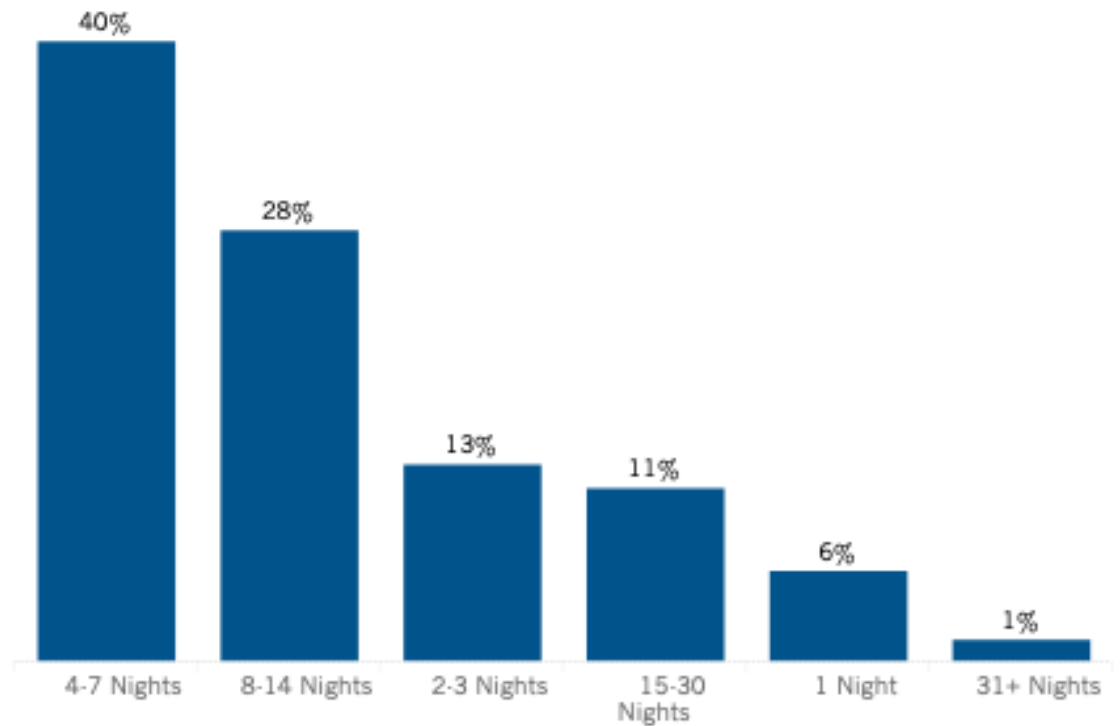
The charts below show types of accommodations stayed in and number of nights in destination among travelers from the focus market.

France

Types of Accommodations



Nights in Destination



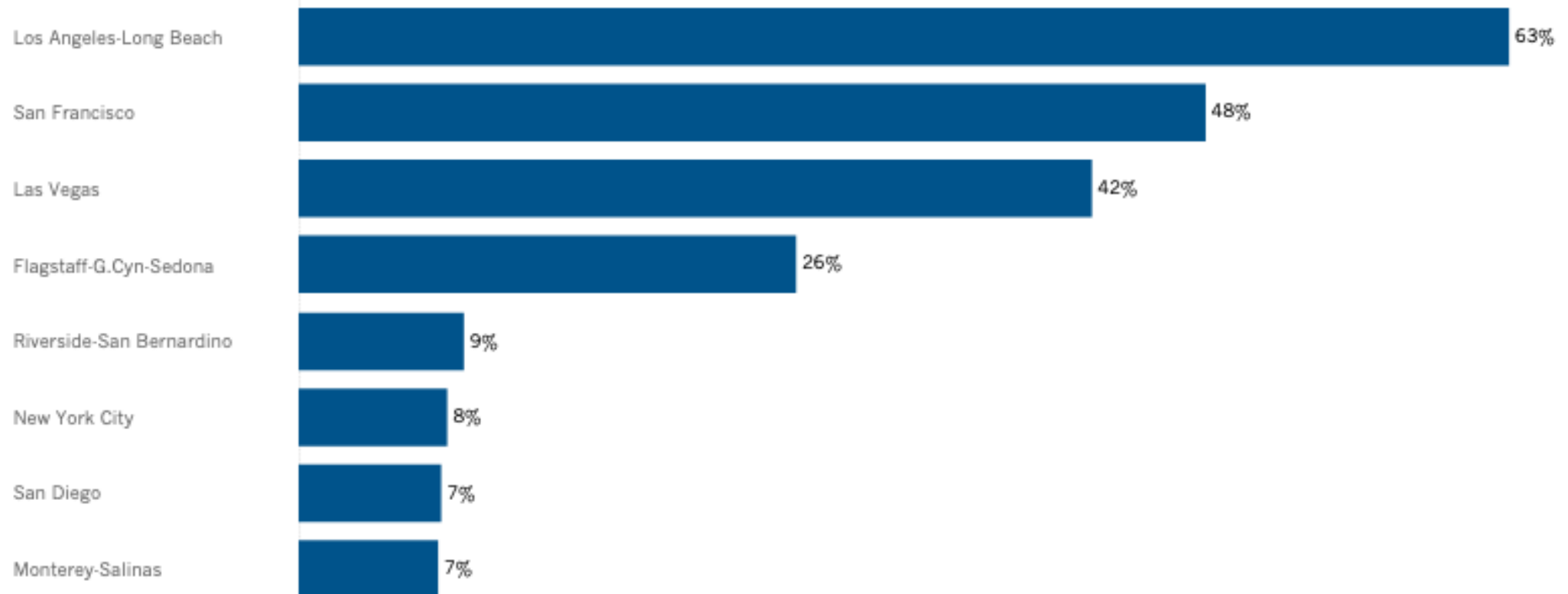


Destinations visited

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

France

US Destinations visited



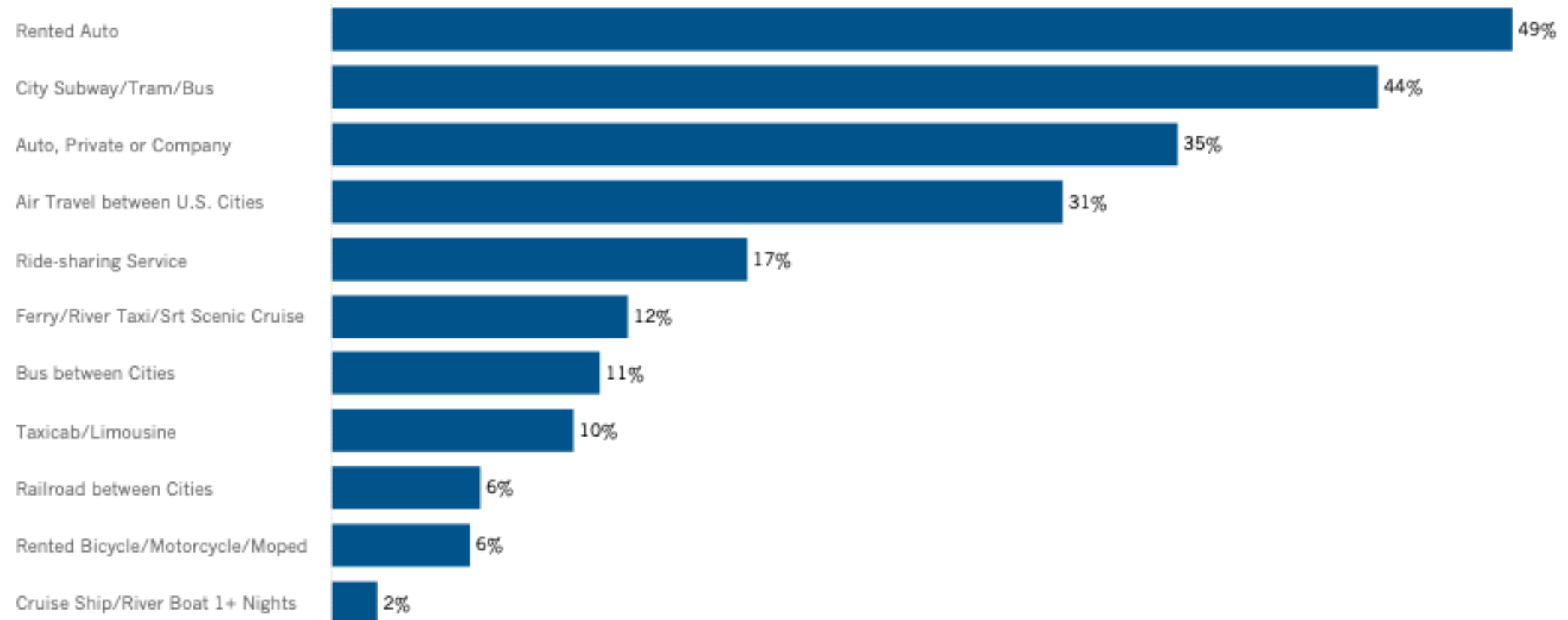


Transportation

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

France

Types of Transportation



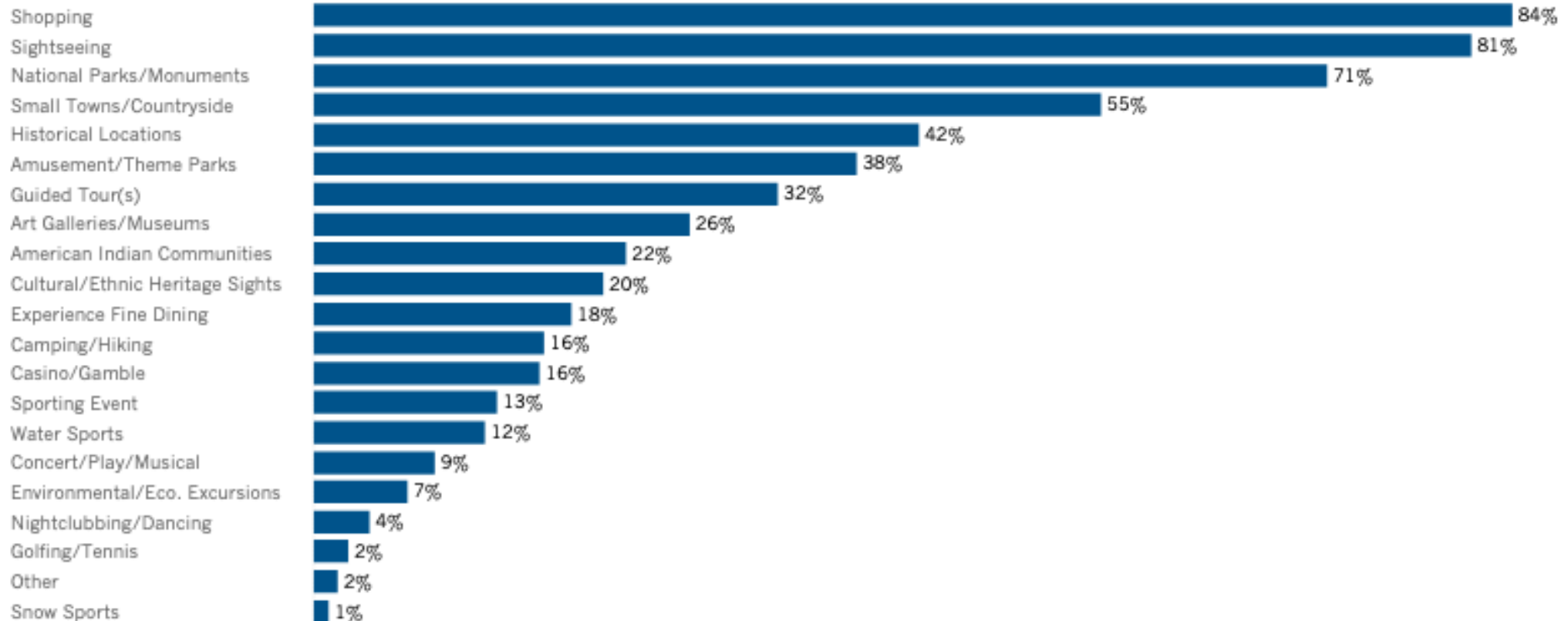


Activities

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

France

Engaged Activities



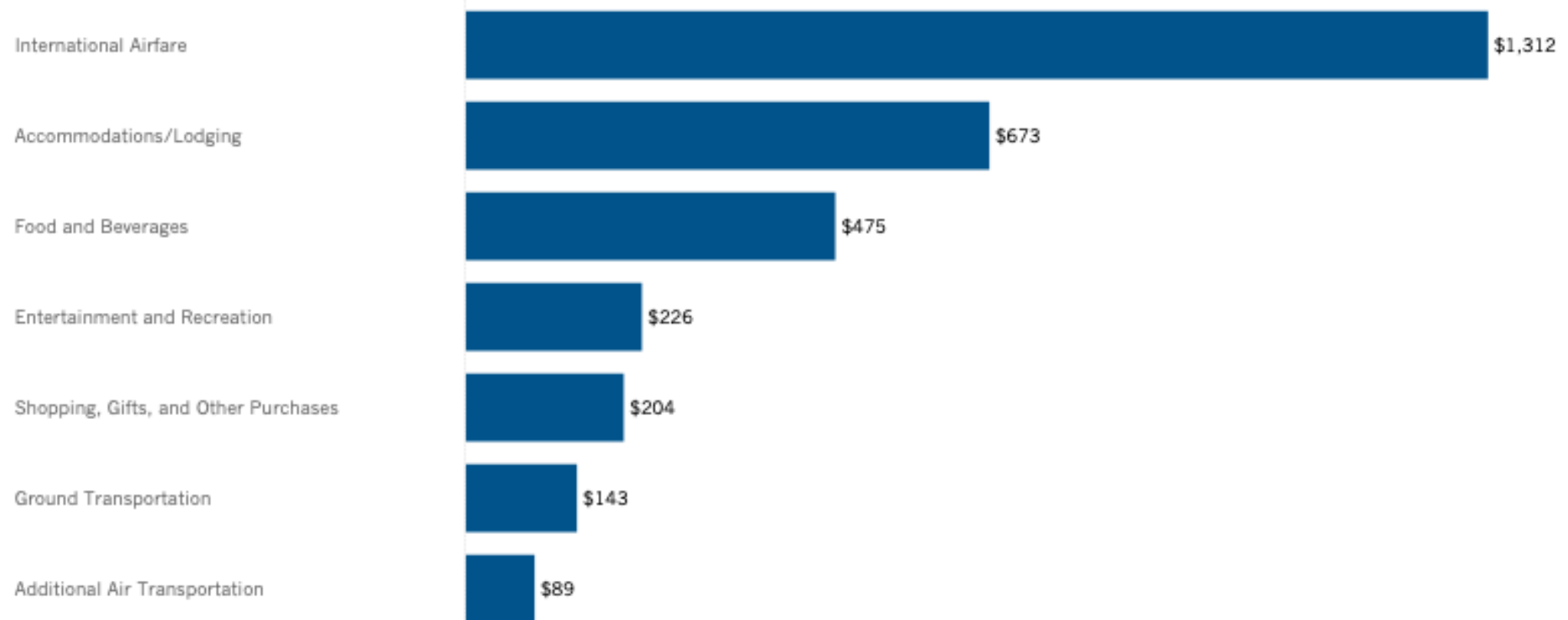


Expenditures in the US

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

France

Expenditures per visitor





Appendix: Audience Insights Market Summary

Audience Profile by Market

The table shows the audience profile for the domestic and 13 international priority markets.

	Australia	Canada	China	France	Germany	India	Italy	Japan	Mexico	Middle East	Nordics	South Korea	United Kingdom	United States
Audience Profile														
% International Leisure Travelers	40%	41%	24%	47%	58%	37%	43%	12%	25%	62%	64%	54%	52%	
% International Leisure Travelers and Considering California	6%	10%	1%	7%	6%	8%	4%	1%	6%	6%	7%	3%	9%	
% of International Leisure Travelers Considering California	15%	23%	4%	14%	10%	21%	9%	9%	26%	9%	11%	6%	17%	
% Domestic Leisure Travelers														49%
% Domestic Leisure Travelers and Considering California														15%
% of Domestic Leisure Travelers Considering California														30%



Demographic Profile Summary

The tables below show the demographic profile of the consumer target for the domestic and 13 international priority markets.

	Australia	Canada	China	France	Germany	India	Italy	Japan	Mexico	Middle East	Nordics	South Korea	United Kingdom	United States
Generation														
Gen Z	12%	9%	11%	12%	13%	18%	14%	13%	11%	9%	10%	12%	14%	9%
Millennial	46%	34%	60%	37%	38%	44%	29%	33%	46%	57%	41%	48%	31%	39%
Gen X	25%	32%	26%	30%	35%	34%	39%	28%	36%	32%	35%	32%	35%	27%
Baby Boomer	18%	25%	3%	21%	14%	5%	18%	26%	7%	2%	14%	8%	20%	26%
Income														
Higher income	45%	30%	8%	23%	7%	54%	19%	18%	12%	27%	35%	55%	43%	14%
Middle income	31%	49%	50%	50%	54%	34%	42%	44%	17%	29%	33%	40%	31%	51%
Lower income	12%	12%	37%	15%	23%	9%	19%	27%	55%	40%	17%	5%	9%	28%
Prefer not to say	12%	8%	5%	12%	15%	2%	20%	11%	16%	4%	15%	0%	17%	7%



Trip Preferences/Characteristics Summary

The table below shows the typical trip preferences & characteristics of the consumer target for the domestic and 13 international priority markets.

	Australia	Canada	China	France	Germany	India	Italy	Japan	Mexico	Middle East	Nordics	South Korea	United Kingdom	United States
Trip Type														
Active/fitness	32%	25%	24%	30%	32%	49%	32%	27%	16%	41%	25%	15%	26%	30%
Adventure	22%	12%	18%	14%	10%	55%	9%	21%	7%	39%	10%	9%	7%	14%
Beach/relax	50%	54%	44%	53%	54%	57%	60%	33%	43%	52%	54%	51%	56%	48%
Camping	18%	18%	19%	18%	13%	34%	6%	13%	3%	32%	9%	14%	14%	18%
City breaks	51%	39%	49%	41%	60%	50%	55%	41%	30%	38%	66%	55%	72%	36%
Combined relax/activities	49%	50%	52%	52%	59%	56%	54%	51%	41%	51%	59%	63%	58%	49%
Culture/history	46%	29%	46%	35%	26%	48%	41%	37%	21%	38%	34%	32%	44%	35%
Food/drink festivals	30%	17%	30%	9%	8%	47%	11%	22%	12%	46%	16%	23%	12%	24%
Group tours	17%	8%	9%	7%	6%	29%	12%	15%	9%	30%	5%	15%	7%	9%
Lakes/mountains/rural	31%	26%	30%	28%	34%	54%	22%	30%	15%	36%	21%	34%	32%	30%
Multi-centered trips	35%	24%	31%	35%	37%	49%	40%	25%	26%	37%	38%	32%	32%	21%
Music/arts/film festivals	19%	13%	25%	13%	9%	41%	13%	22%	9%	34%	13%	16%	11%	18%
Shopping	24%	20%	39%	13%	9%	49%	12%	37%	37%	47%	21%	26%	9%	17%
Spa	15%	11%	21%	13%	25%	35%	19%	30%	14%	38%	21%	22%	11%	10%
Sports events	23%	17%	14%	10%	9%	41%	9%	21%	14%	36%	13%	13%	12%	18%
Theme parks	26%	19%	44%	17%	11%	41%	16%	26%	25%	39%	11%	24%	16%	25%
Winter sports	12%	9%	21%	18%	13%	39%	9%	17%	4%	32%	14%	16%	7%	8%



Trip Preferences/Characteristics Summary

The tables below show the typical trip preferences & characteristics of the consumer target in the 13 international priority markets.

	Australia	Canada	China	France	Germany	India	Italy	Japan	Mexico	Middle East	Nordics	South Korea	United Kingdom	United States
Traveler Type														
Adventurous	14%	11%	2%	13%	23%	13%	14%	11%	10%	10%	23%	16%	14%	12%
All-inclusive	7%	15%	2%	10%	17%	5%	7%	5%	12%	4%	9%	9%	15%	5%
Budget	45%	43%	60%	45%	25%	36%	42%	34%	46%	42%	32%	25%	37%	42%
Luxury	12%	10%	11%	7%	9%	28%	4%	16%	8%	25%	9%	15%	8%	8%
Responsible	12%	11%	21%	11%	13%	15%	22%	15%	14%	14%	6%	21%	8%	12%
Travel Party														
My partner	63%	58%	73%	66%	63%	70%	71%	45%	65%	76%	56%	51%	68%	59%
My children	35%	27%	57%	37%	28%	59%	25%	25%	60%	66%	26%	37%	29%	33%
Friend(s)	23%	23%	25%	22%	23%	46%	25%	22%	11%	33%	20%	26%	19%	23%
Other family	18%	20%	26%	21%	16%	39%	14%	12%	45%	36%	21%	29%	17%	23%
Solo	13%	13%	4%	9%	7%	5%	3%	26%	6%	4%	10%	7%	7%	10%
Other person(s)	2%	2%	3%	4%	4%	16%	3%	0%	1%	10%	4%	8%	1%	4%



“CA Traveler Target”

Organizing/Planning Methods Summary

The tables below show the organizing and planning methods of the consumer target for the domestic and 13 international priority markets.

	Australia	Canada	China	France	Germany	India	Italy	Japan	Mexico	Middle East	Nordics	South Korea	United Kingdom	United States
Organizing Travel														
Booking on-the-go	12%	8%	15%	8%	13%	34%	10%	11%	14%	28%	8%	11%	4%	10%
Fully customized/travel servi	14%	5%	29%	8%	11%	35%	17%	18%	26%	31%	7%	20%	6%	7%
Group organized travel	23%	14%	32%	13%	11%	50%	17%	23%	18%	42%	16%	29%	11%	19%
Part-organized part-not	19%	14%	45%	18%	22%	35%	18%	30%	26%	33%	21%	42%	10%	17%
Self-organized	86%	82%	67%	87%	84%	79%	80%	86%	71%	72%	81%	73%	91%	83%
Planning Methods														
DMO/CVB	35%	21%	43%	26%	22%	61%	7%	45%	38%	51%	20%	23%	18%	21%
Friends/ family	63%	55%	58%	48%	52%	65%	43%	42%	43%	67%	48%	52%	59%	61%
Online forums	32%	21%	53%	20%	24%	56%	29%	32%	17%	40%	23%	29%	27%	25%
Online random search	63%	57%	37%	62%	46%	63%	55%	58%	55%	55%	64%	46%	65%	58%
Printed resources	31%	15%	20%	16%	18%	55%	18%	32%	12%	39%	11%	17%	18%	20%
Social media platforms	48%	32%	68%	25%	30%	69%	29%	33%	36%	63%	26%	56%	29%	35%
TV/radio	29%	13%	20%	12%	18%	53%	12%	34%	10%	33%	8%	28%	13%	15%
Travel Blogs	40%	30%	49%	32%	29%	61%	40%	43%	33%	51%	22%	60%	31%	28%
Travel websites	37%	34%	43%	37%	37%	56%	43%	42%	23%	38%	40%	23%	34%	26%



Booking Preferences Summary

The tables below show the accommodation preferences of of the consumer target for the domestic and 13 international priority markets.

	Australia	Canada	China	France	Germany	India	Italy	Japan	Mexico	Middle East	Nordics	South Korea	United Kingdom	United States
Accommodation Preference														
B&B	28%	23%	15%	24%	26%	49%	53%	19%	30%	37%	20%	29%	33%	23%
Campsite	14%	17%	18%	22%	13%	32%	7%	18%	7%	27%	10%	19%	14%	17%
Family/ friends	39%	38%	22%	43%	25%	48%	21%	22%	32%	47%	33%	14%	32%	49%
Hostel	11%	10%	14%	11%	6%	36%	6%	20%	7%	32%	13%	20%	11%	12%
Luxury hotel	57%	49%	72%	39%	53%	68%	49%	53%	66%	56%	54%	51%	58%	38%
RV	9%	4%	11%	9%	10%	29%	4%	10%	4%	26%	6%	11%	3%	5%
Standard hotel	55%	51%	62%	52%	57%	62%	56%	64%	35%	47%	66%	70%	54%	62%
Vacation rental	35%	33%	21%	54%	47%	41%	49%	17%	37%	40%	37%	16%	46%	29%
Booking Preference														
Direct by hotel website	50%	47%	56%	26%	47%	53%	40%	55%	48%	48%	50%	40%	51%	52%
Direct by phone	20%	17%	17%	22%	9%	40%	15%	20%	17%	37%	6%	18%	8%	23%
Hotel/STVR website	61%	50%	74%	48%	59%	62%	56%	52%	51%	52%	55%	68%	59%	46%
OTA (general travel)	56%	44%	69%	49%	60%	69%	45%	53%	52%	55%	52%	62%	46%	33%
Retail travel agency	18%	15%	16%	24%	15%	47%	10%	28%	18%	38%	4%	19%	9%	11%
Stay with family/friends	20%	20%	24%	24%	18%	39%	15%	13%	17%	39%	21%	9%	24%	29%
Tour operator	22%	10%	39%	16%	32%	62%	20%	42%	18%	51%	30%	18%	46%	11%
Travel discounter	18%	23%	17%	21%	10%	42%	18%	18%	25%	36%	18%	26%	21%	22%



“CA Traveler Target”

Travel Spending Summary

The table below shows the travel spending of the consumer target based on the most recent vacation for the domestic and 13 international priority markets.

	Australia	Canada	China	France	Germany	India	Italy	Japan	Mexico	Middle East	Nordics	South Korea	United Kingdom	United States
Travel Spending														
Low spenders	8%	14%	16%	38%	25%	17%	44%	34%	31%	26%	34%	8%	36%	40%
Medium spenders	50%	45%	60%	44%	51%	49%	41%	38%	55%	42%	51%	31%	46%	42%
High spenders	43%	41%	23%	17%	24%	33%	15%	28%	14%	32%	15%	61%	18%	18%



Media & Advertising Summary

The table shows advertising influences of the target consumer for the domestic and 13 international priority markets.

	Australia	Canada	China	France	Germany	India	Italy	Japan	Mexico	Middle East	Nordics	South Korea	United Kingdom	United States
Advertising Influences														
Billboards	35%	25%	44%	41%	28%	54%	19%	38%	34%	51%	20%	26%	22%	26%
Cinema	35%	18%	31%	28%	20%	50%	17%	31%	21%	51%	15%	24%	20%	17%
Direct mail	28%	23%	21%	20%	16%	57%	15%	29%	21%	51%	17%	18%	15%	29%
Local newspaper (digital)	22%	15%	23%	19%	16%	47%	14%	33%	17%	45%	14%	20%	9%	20%
Local newspaper (physical)	24%	11%	22%	21%	18%	49%	10%	25%	10%	42%	13%	13%	7%	16%
Magazines (digital)	26%	21%	35%	26%	23%	50%	37%	27%	31%	45%	19%	22%	15%	23%
Magazines (physical)	22%	16%	23%	23%	19%	49%	15%	19%	13%	37%	12%	13%	11%	19%
National newspaper (digital)	26%	17%	21%	21%	16%	48%	19%	25%	17%	37%	17%	20%	18%	20%
National newspaper (physical)	21%	10%	15%	15%	12%	47%	12%	22%	6%	35%	10%	10%	12%	12%
Online streaming services	43%	32%	59%	23%	33%	51%	24%	33%	29%	42%	24%	42%	29%	40%
Podcast	25%	16%	23%	14%	19%	35%	16%	10%	28%	29%	15%	11%	17%	23%
Public transport	29%	18%	32%	21%	18%	42%	21%	24%	17%	37%	15%	28%	18%	15%
Radio	26%	18%	6%	20%	19%	28%	24%	13%	17%	29%	15%	9%	17%	19%
Social media	59%	51%	64%	47%	44%	66%	54%	41%	66%	68%	47%	51%	52%	59%
TV - Free to view channels	43%	30%	38%	42%	29%	55%	35%	38%	21%	41%	23%	44%	35%	33%
TV - paid/subscription	28%	20%	13%	19%	19%	52%	19%	20%	19%	29%	15%	19%	18%	24%
Travel websites	52%	44%	52%	47%	41%	56%	44%	53%	48%	45%	32%	38%	39%	40%



Media & Advertising Summary

The table shows sports preferences of the target consumer for the domestic and 13 international priority markets.

	Australia	Canada	China	France	Germany	India	Italy	Japan	Mexico	Middle East	Nordics	South Korea	United Kingdom	United States
Sports Watched/Followed														
Athletics/Track & Field	13%	10%	17%	21%	13%	32%	19%	20%	15%	24%	14%	12%	12%	9%
Australian Rules Football	42%	4%	7%	3%	2%	20%	2%	9%	3%	19%	1%	7%	0%	3%
Baseball	13%	25%	9%	4%	4%	27%	4%	49%	29%	27%	3%	42%	3%	35%
Basketball	28%	29%	53%	21%	13%	36%	16%	18%	31%	42%	9%	26%	6%	39%
Boxing	13%	9%	19%	11%	10%	33%	6%	17%	38%	39%	6%	12%	10%	14%
Cricket	24%	5%	5%	3%	2%	72%	2%	5%	0%	36%	1%	4%	15%	3%
Cycling	10%	7%	20%	23%	9%	36%	17%	12%	16%	36%	6%	12%	9%	7%
Golf	13%	16%	12%	8%	6%	31%	5%	19%	6%	29%	7%	30%	9%	15%
Gymnastics	13%	10%	20%	12%	3%	30%	12%	19%	18%	28%	4%	9%	5%	15%
Horse Racing	10%	5%	10%	6%	2%	26%	4%	11%	5%	28%	4%	5%	4%	8%
Ice Hockey	13%	45%	5%	6%	10%	23%	3%	12%	6%	20%	22%	5%	4%	17%
NFL	23%	30%	14%	9%	13%	30%	7%	11%	45%	25%	8%	8%	8%	48%
Rugby League	25%	4%	6%	9%	2%	19%	4%	15%	3%	18%	1%	6%	8%	4%
Running/Marathon	12%	5%	28%	11%	7%	28%	9%	24%	8%	26%	8%	19%	7%	7%
Soccer/Football	37%	26%	41%	35%	40%	49%	39%	36%	45%	47%	31%	42%	41%	24%
Surfing	8%	4%	8%	6%	3%	22%	3%	9%	3%	23%	1%	7%	1%	5%
Swimming	23%	13%	36%	19%	10%	38%	19%	23%	18%	46%	8%	24%	7%	16%
Tennis	39%	21%	33%	39%	16%	48%	40%	29%	21%	43%	14%	22%	18%	18%
Volleyball	14%	9%	19%	12%	6%	34%	21%	22%	16%	37%	4%	16%	1%	11%