

# Global Market Profile

MIDDLE EAST



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.



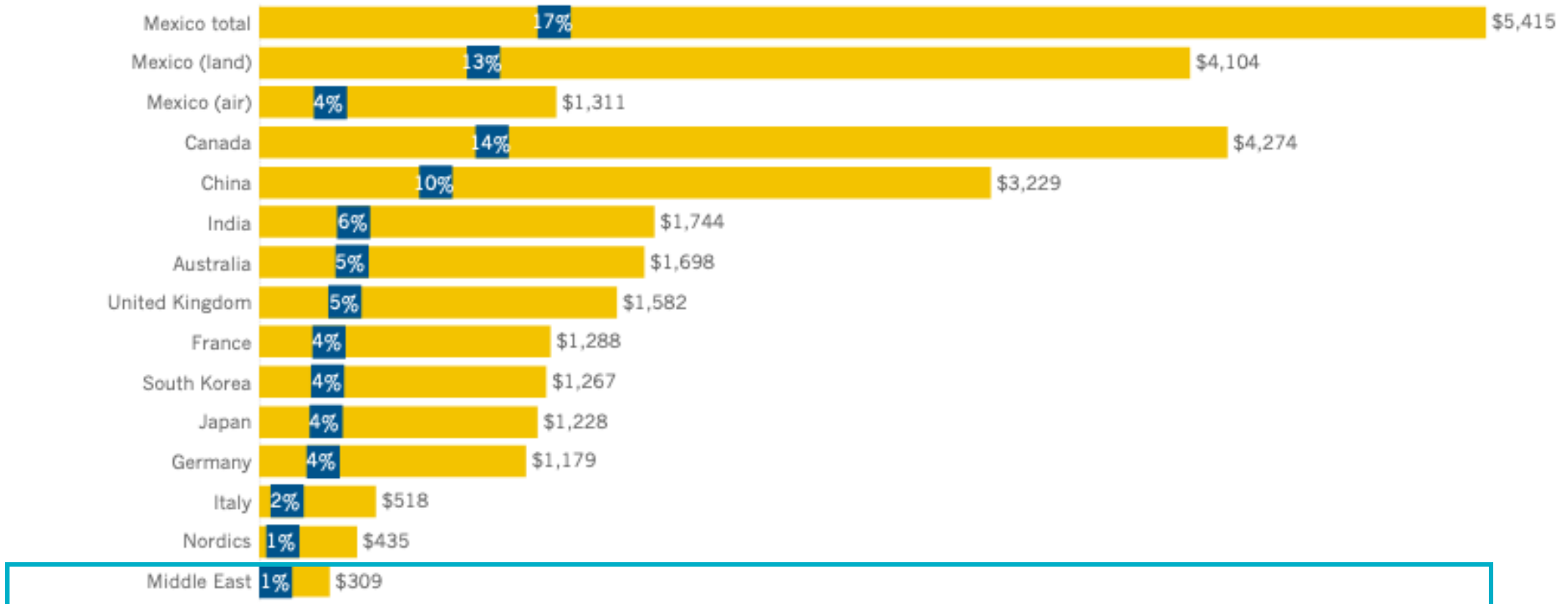


# Market Landscape

# 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



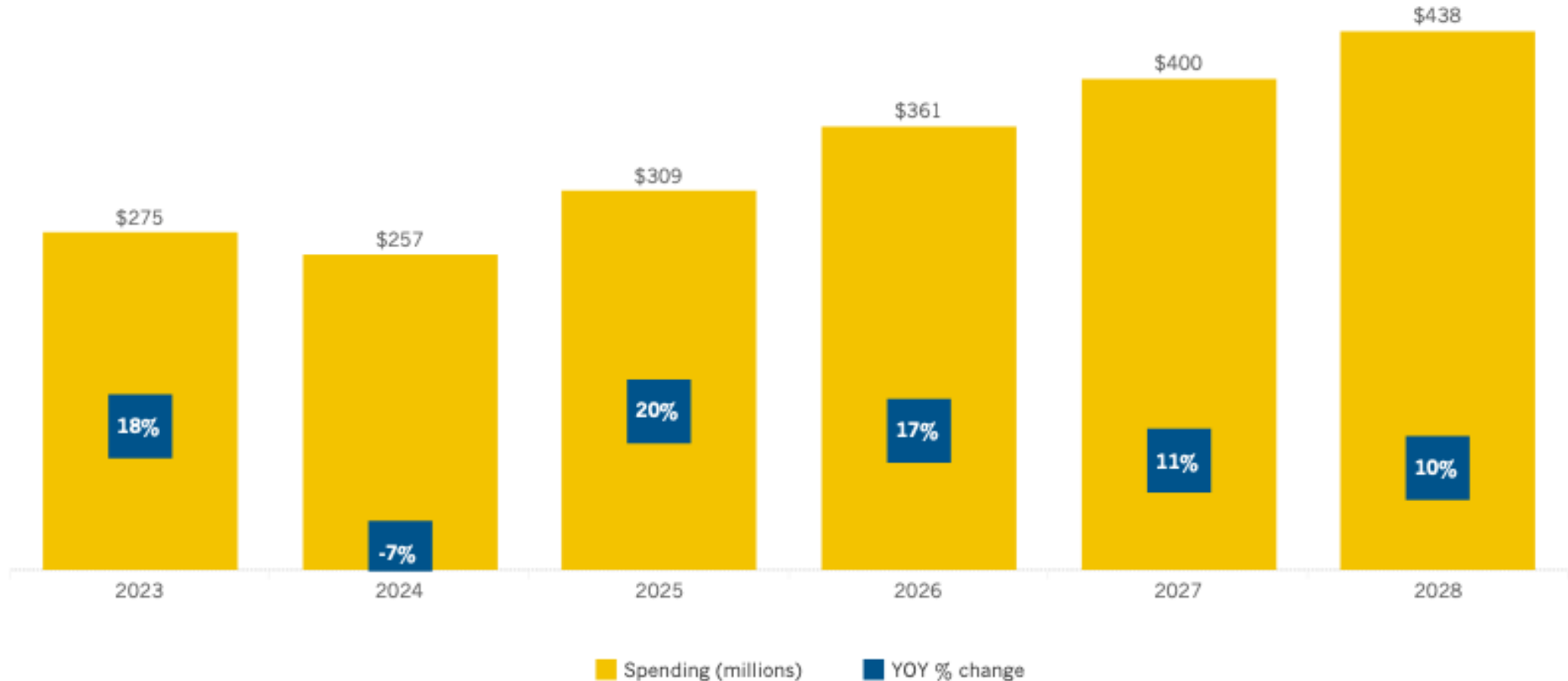
■ Spending (millions)

■ Share of Total Int'l Spending

# Forecast: Visitor Spending

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

Middle East: Spending Forecast and YOY % change

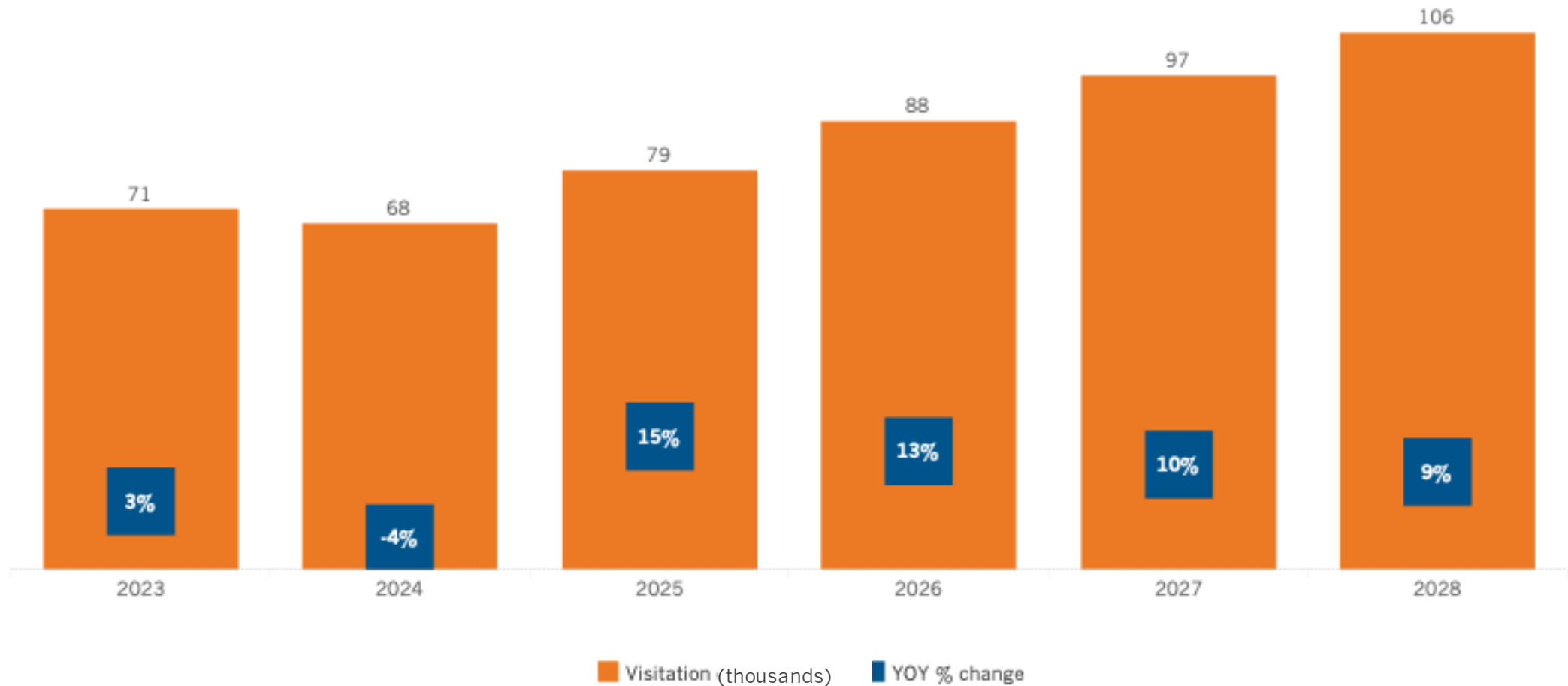




# Forecast: Visitor Volume

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

Middle East: 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)		Middle East Visitor Spend* (2023)		Index
	Spending (\$B)	%	Spending (\$B)	%	
Central Coast	\$0.828	3.7%	\$0.005	1.6%	45
Central Valley	\$0.278	1.2%	\$0.001	0.4%	31
Deserts	\$0.861	3.8%	\$0.001	0.5%	13
Gold Country	\$0.168	0.7%	\$0.001	0.3%	43
High Sierra	\$0.238	1.1%	\$0.001	0.4%	35
Inland Empire	\$0.308	1.4%	\$0.003	1.1%	82
<b>Los Angeles</b>	<b>\$8.113</b>	<b>36.0%</b>	<b>\$0.171</b>	<b>62.1%</b>	<b>173</b>
North Coast	\$0.037	0.2%	\$0.000	0.0%	25
<b>Orange County</b>	<b>\$2.219</b>	<b>9.8%</b>	<b>\$0.030</b>	<b>10.8%</b>	<b>109</b>
San Diego	\$3.062	13.6%	\$0.023	8.3%	61
San Francisco Bay Area	\$6.407	28.4%	\$0.040	14.4%	51
Shasta Cascade	\$0.030	0.1%	\$0.000	0.0%	36
<b>Total California</b>	<b>\$22.549</b>	<b>100%</b>	<b>\$0.275</b>	<b>100%</b>	

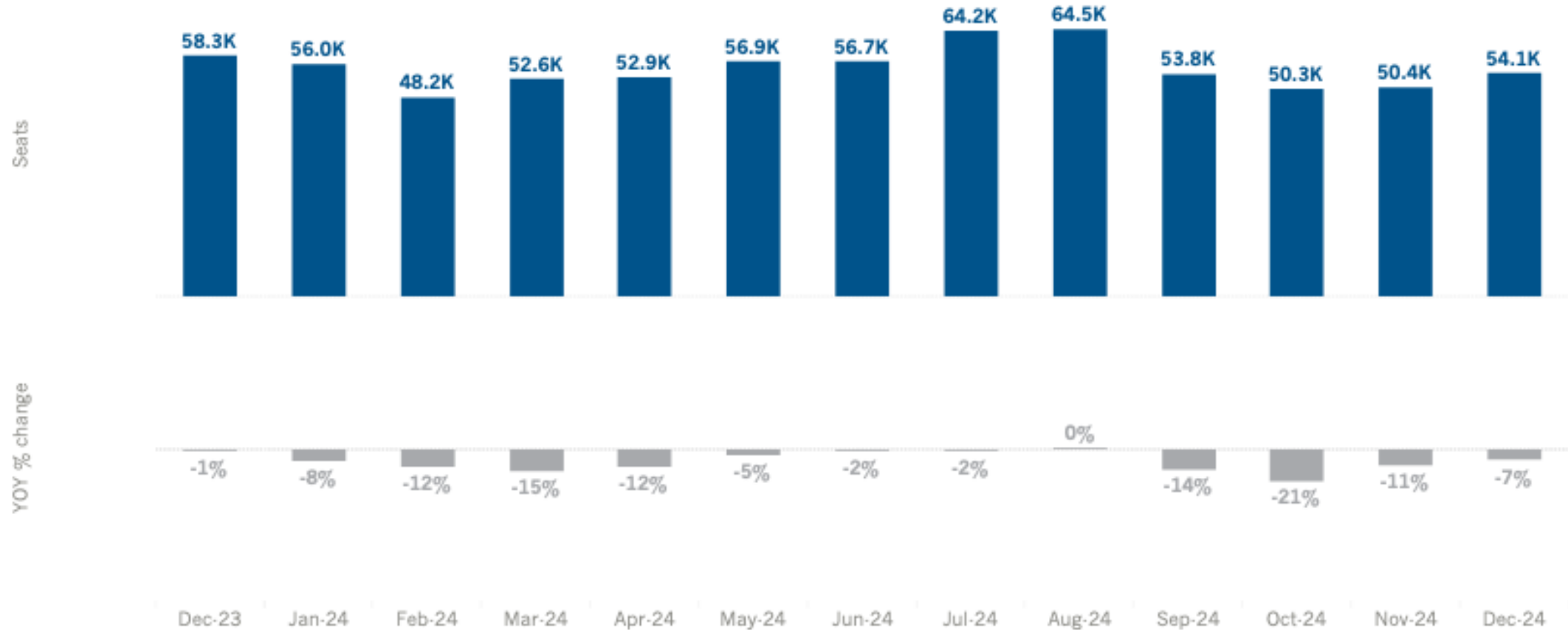
\*Regional visitor spending for the focus market is estimated using a Visit California proprietary model that adjusts statewide visitor spending estimates for the focus market to the region-level using Visa Destination Insights credit card data. The index shown compares the regional share of spending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

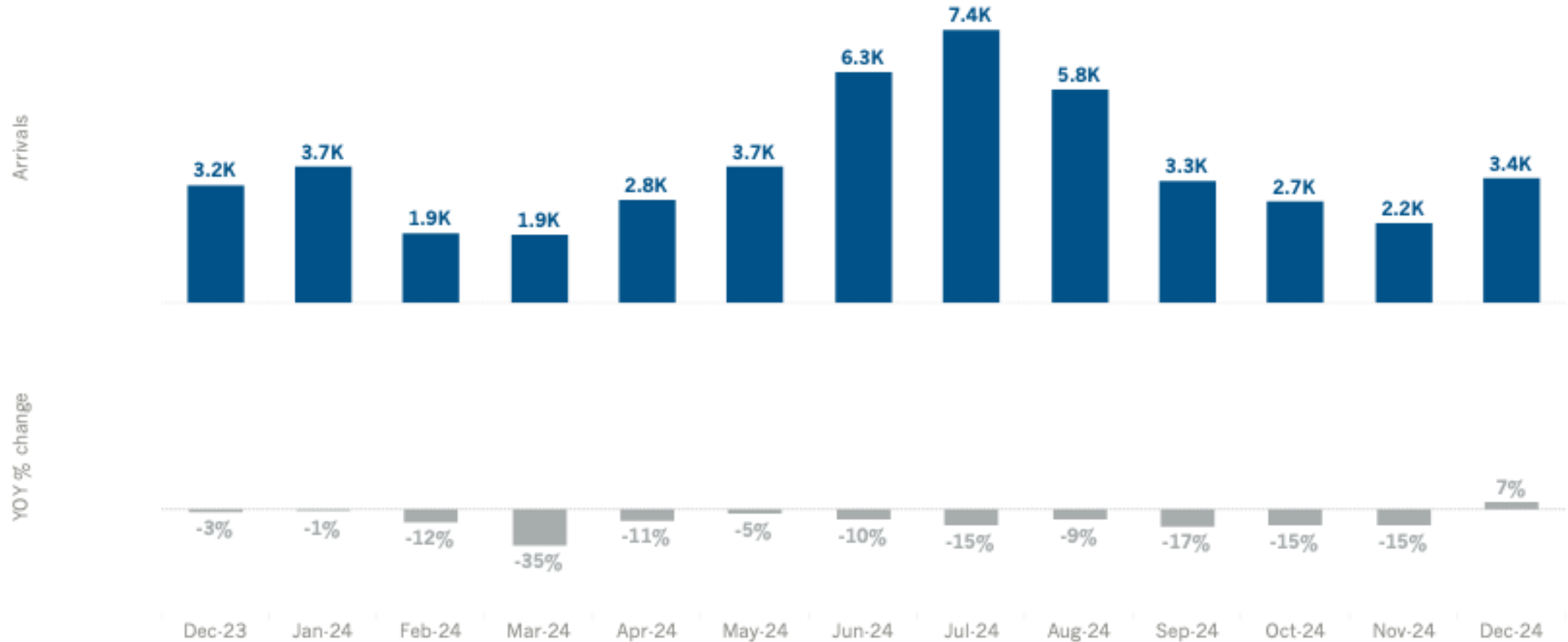
## Middle East: Non-Stop Seats



# Non-Resident Arrivals to California

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

Middle East: Non-Resident Arrivals at Ports of Entry



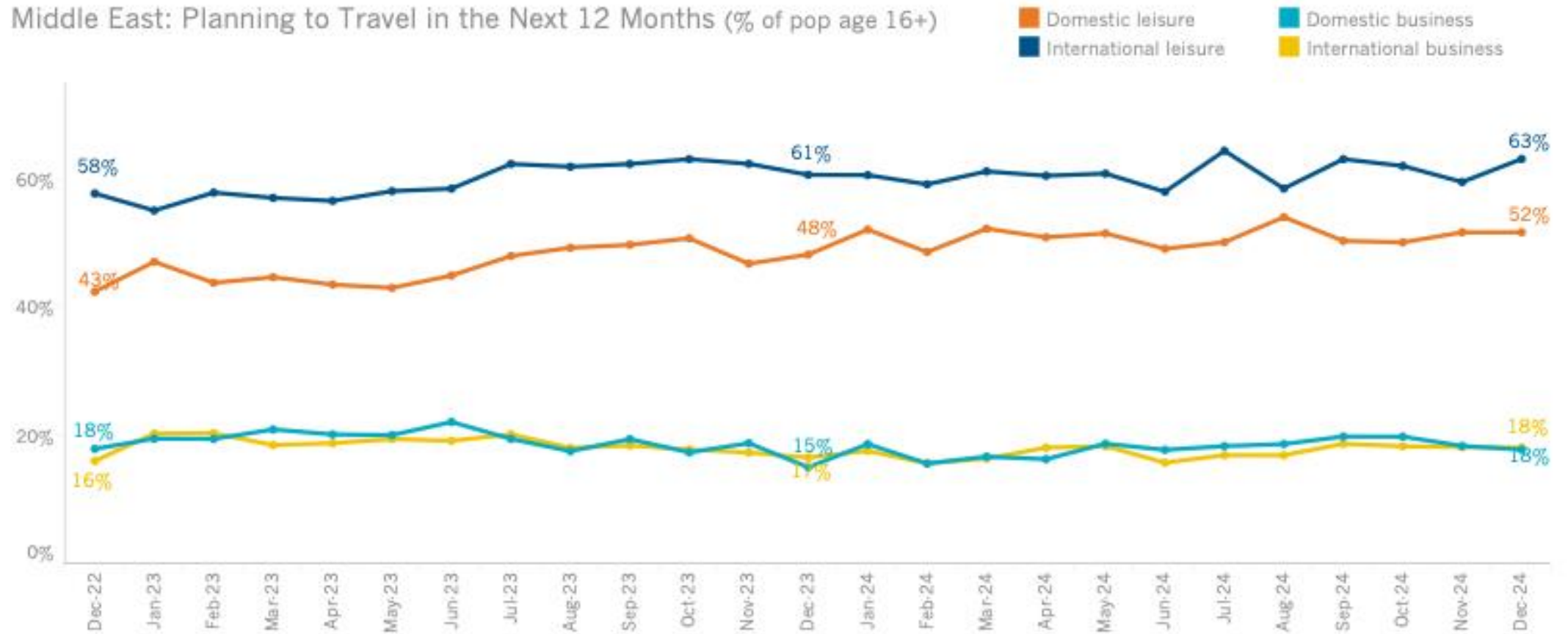
# California's Int'l Market Share (Visits)

	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.

Middle East: 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?

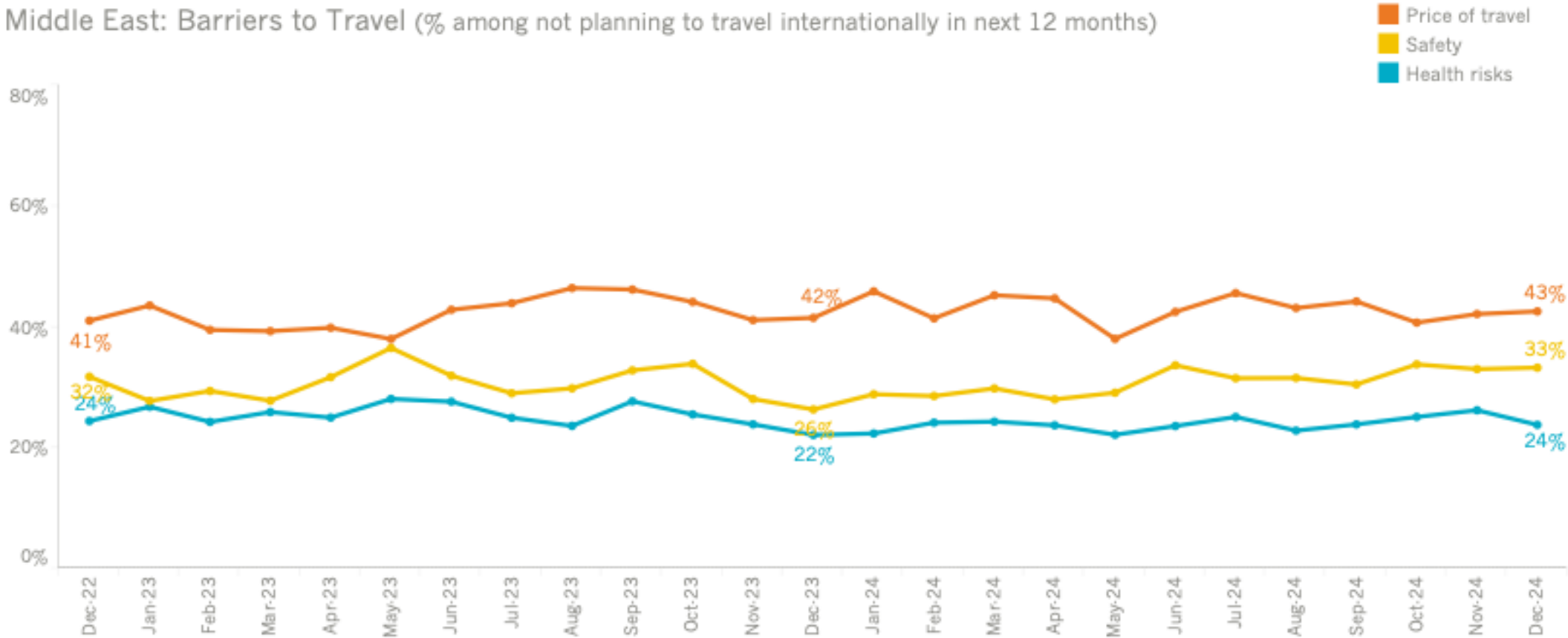
Data reported through: December 2024

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.

Middle East: 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.

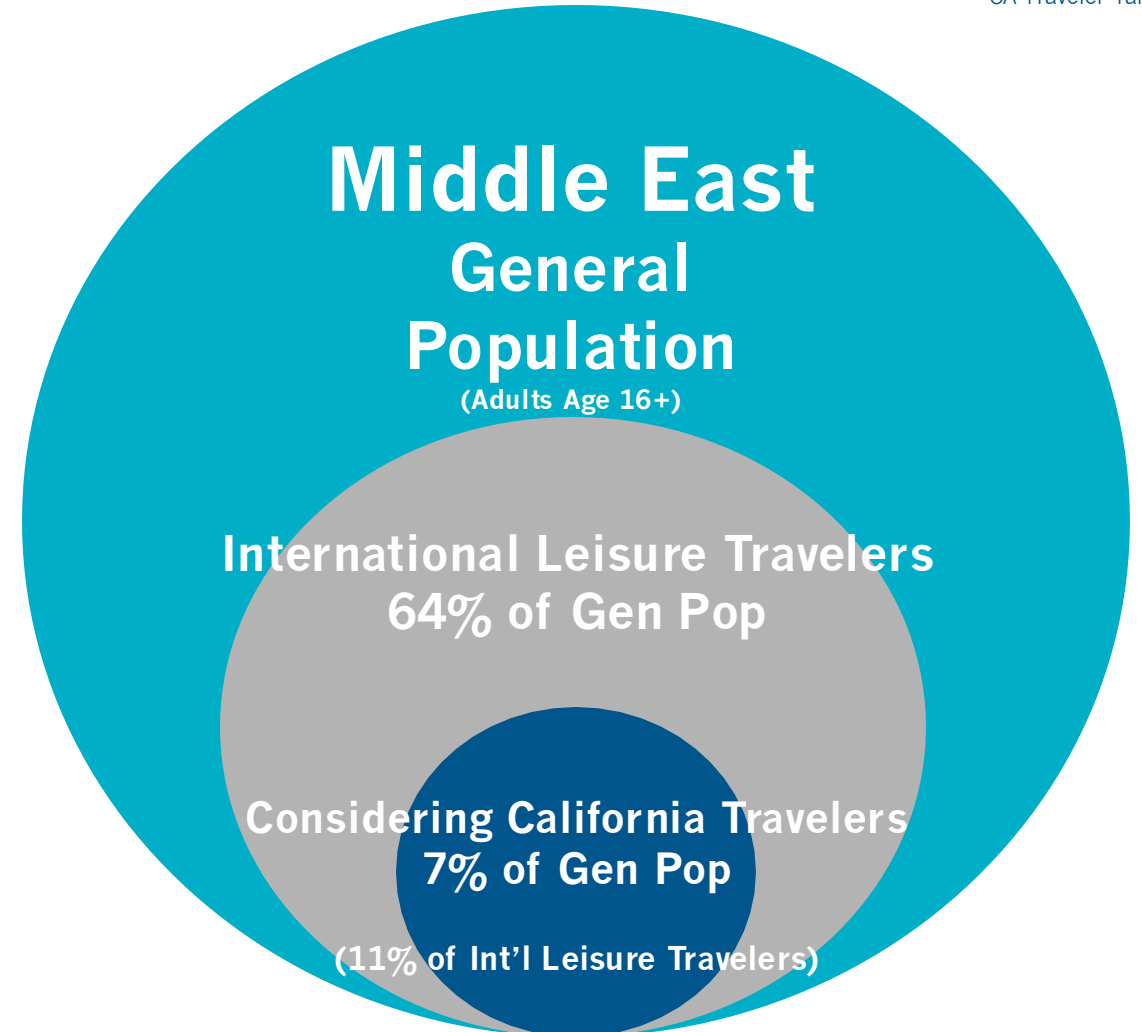
## Definitions:

### 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.



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.

## Middle East

Gender		
	CA Traveler Target	Index
Female	28%	82
Male	72%	109

Marital Status		
	CA Traveler Target	Index
Married w/ kids	73%	111
Single	18%	75
Married no kids	5%	72

Family Status		
	CA Traveler Target	Index
Children <18	65%	120

Age		
	CA Traveler Target	Index
Age 16-24	9%	78
Age 25-34	31%	95
Age 35-44	30%	100
Age 45-54	24%	123
Age 55+	6%	96

Generation		
	CA Traveler Target	Index
Gen Z	9%	78
Millennial	57%	98
Gen X	32%	115
Baby Boomer	2%	72

Income*		
	CA Traveler Target	Index
Higher income	27%	147
Middle income	29%	85
Lower income	40%	98
Prefer not to say	4%	62

Region: Saudi Arabia		
	CA Traveler Target	Index
Riyadh	47%	115
Jeddah	21%	90
Dammam	8%	92
Madinah	7%	154
Makkah	5%	71

Region: UAE		
	CA Traveler Target	Index
Dubai	52%	106
Abu Dhabi	28%	108
Sharjah	11%	86

\*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.

## Middle East

### Trip Type



### Traveler Type

	CA Traveler Target	Index
Budget	42%	88
Luxury	25%	151
Responsible	14%	106
Adventurous	10%	104
All-inclusive	4%	81

### Travel Party (from most recent vacation)

	CA Traveler Target	Index
My partner	76%	111
My children	66%	118
Other family	36%	142
Friend(s)	33%	129
Other person(s)	10%	146
Solo	4%	65

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)



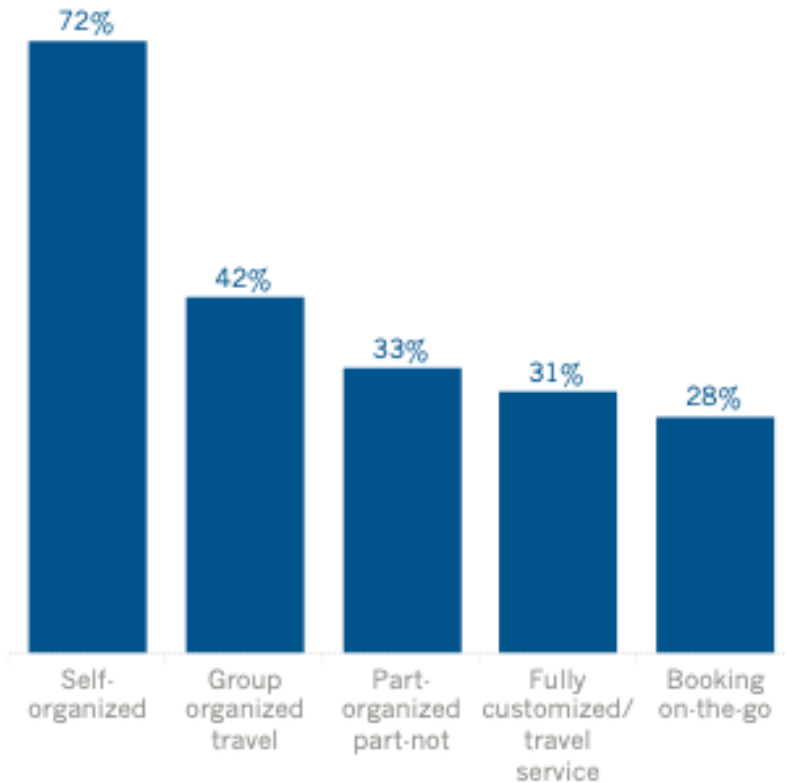
Int'l leisure travelers  
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# Organizing/Planning Methods

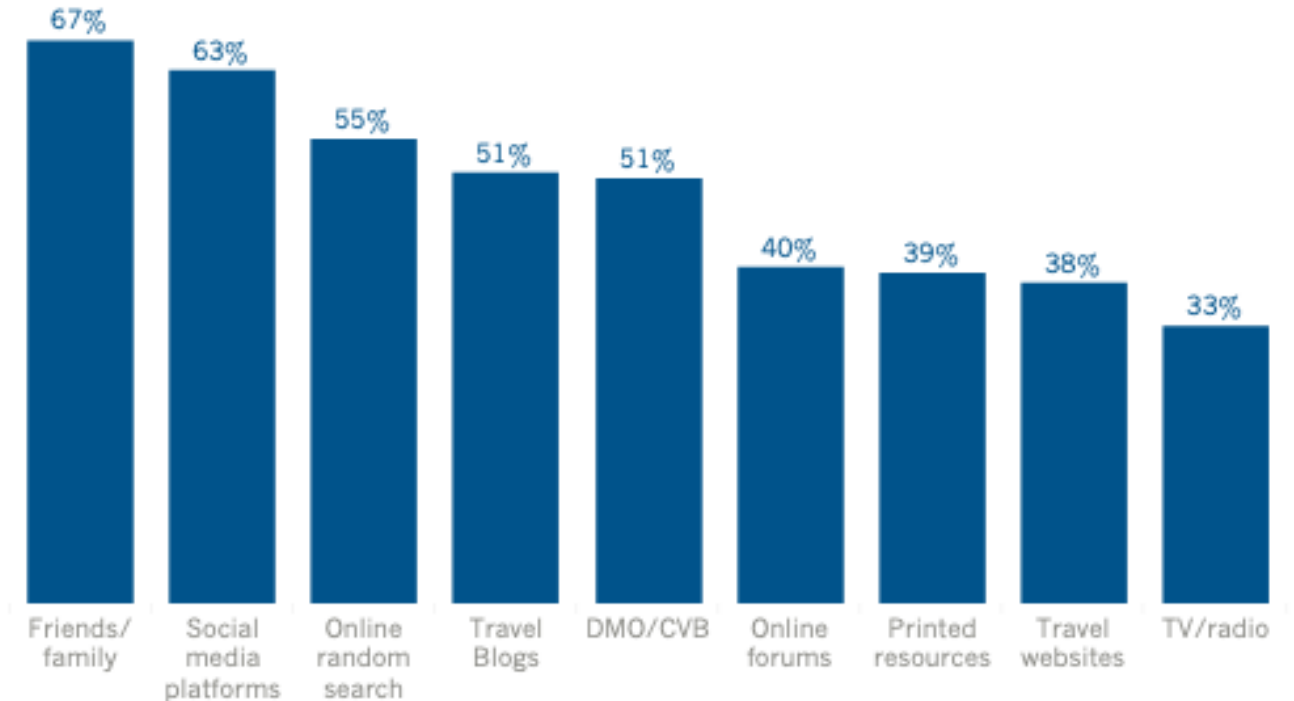
The chart below shows the organizing and planning methods of the consumer target in the focus market.

## Middle East

### 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)



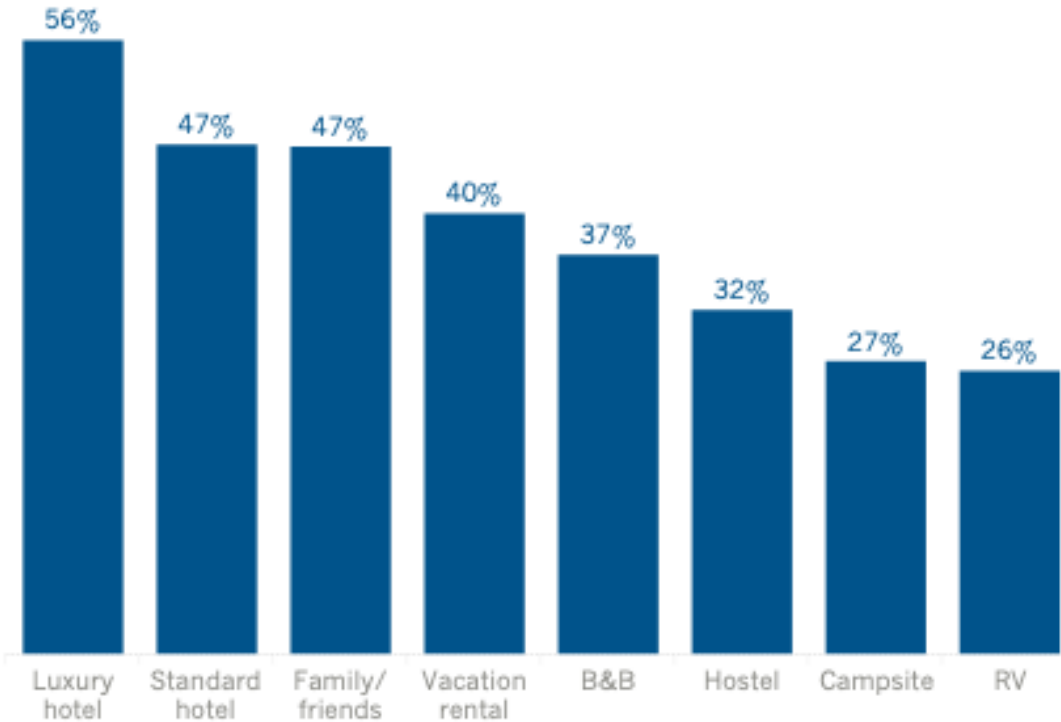
Int'l leisure travelers  
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# Booking Preferences

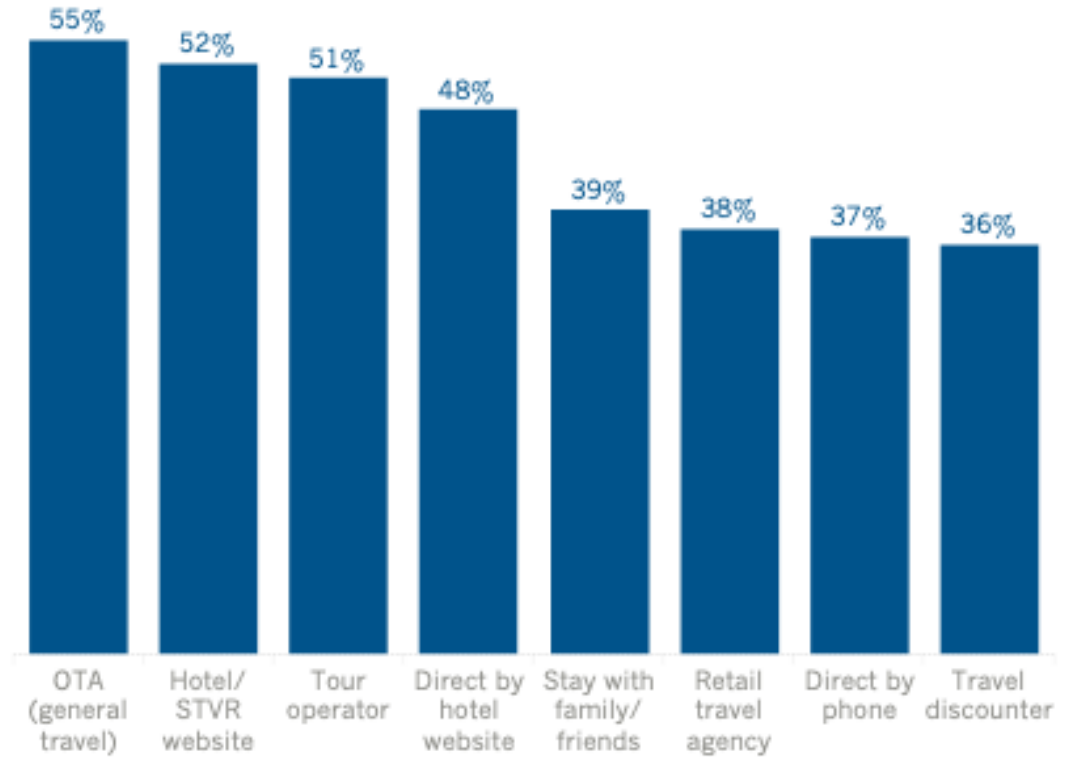
The chart below shows the accommodation preferences of the consumer target in the focus market.

## Middle East

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?

Source: YouGov (2024)



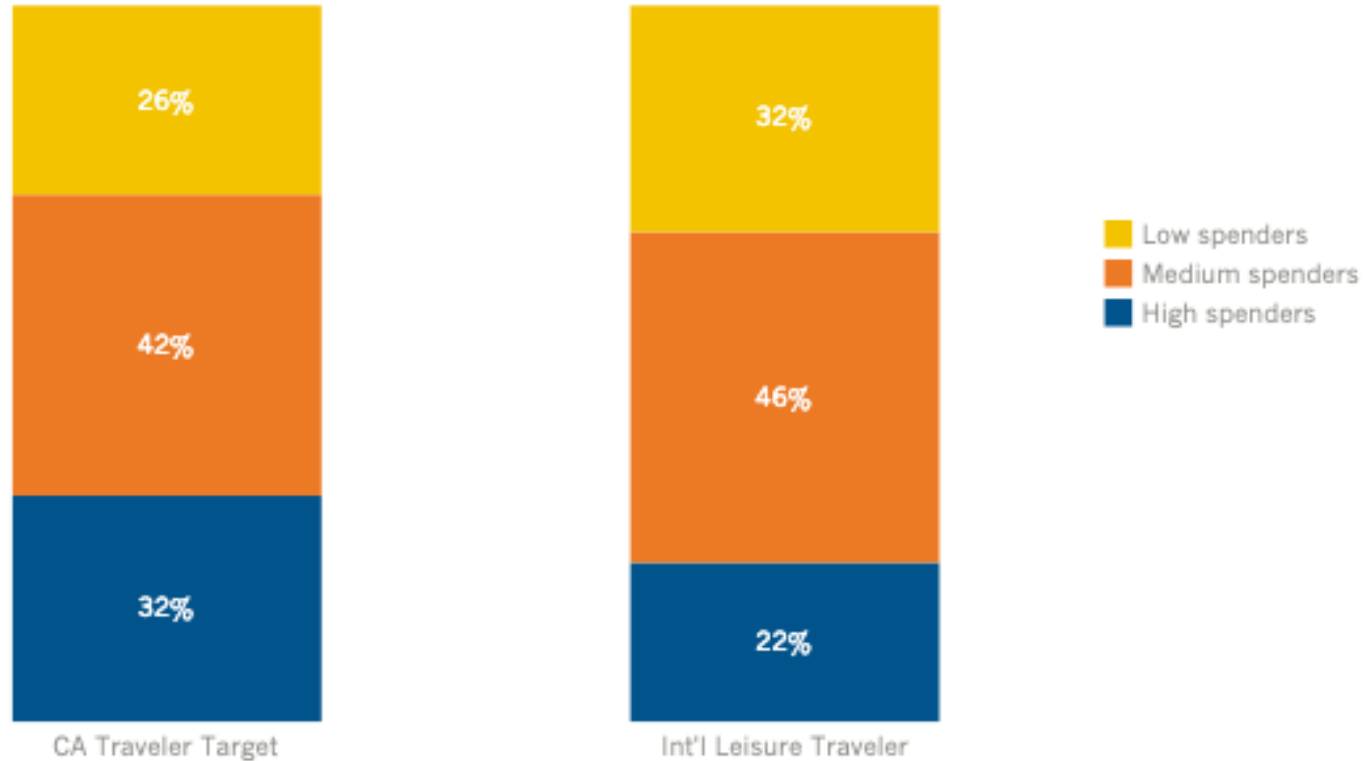
Int'l leisure travelers  
considering  
California  
"CA Traveler Target"

# Travel Spending

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

## Middle East

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.

## Middle East

### Advertising Influences

	CA Traveler Target	Index
Social media	68%	121
Billboards	51%	147
Cinema	51%	148
Direct mail	51%	159
Travel websites	45%	148
Magazines (digital)	45%	169
Local newspaper (digital)	45%	186
Local newspaper (physical)	42%	184
Online streaming services	42%	159
TV - Free to view channels	41%	167
Public transport	37%	200
National newspaper (digital)	37%	212
Magazines (physical)	37%	183
National newspaper (physical)	35%	221
TV - paid/subscription	29%	196
Podcast	29%	181
Radio	29%	216

### Sports Watched/Followed

	CA Traveler Target	Index
Soccer/Football	47%	125
Swimming	46%	169
Tennis	43%	168
Basketball	42%	163
Boxing	39%	199
Volleyball	37%	191
Cricket	36%	152
Cycling	36%	209
Golf	29%	292
Gymnastics	28%	220
Horse Racing	28%	185
Baseball	27%	298
Running/Marathon	26%	205
NFL	25%	247
Athletics/Track & Field	24%	227
Surfing	23%	288
Ice Hockey	20%	273
Australian Rules Football	19%	294
Rugby League	18%	308

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)





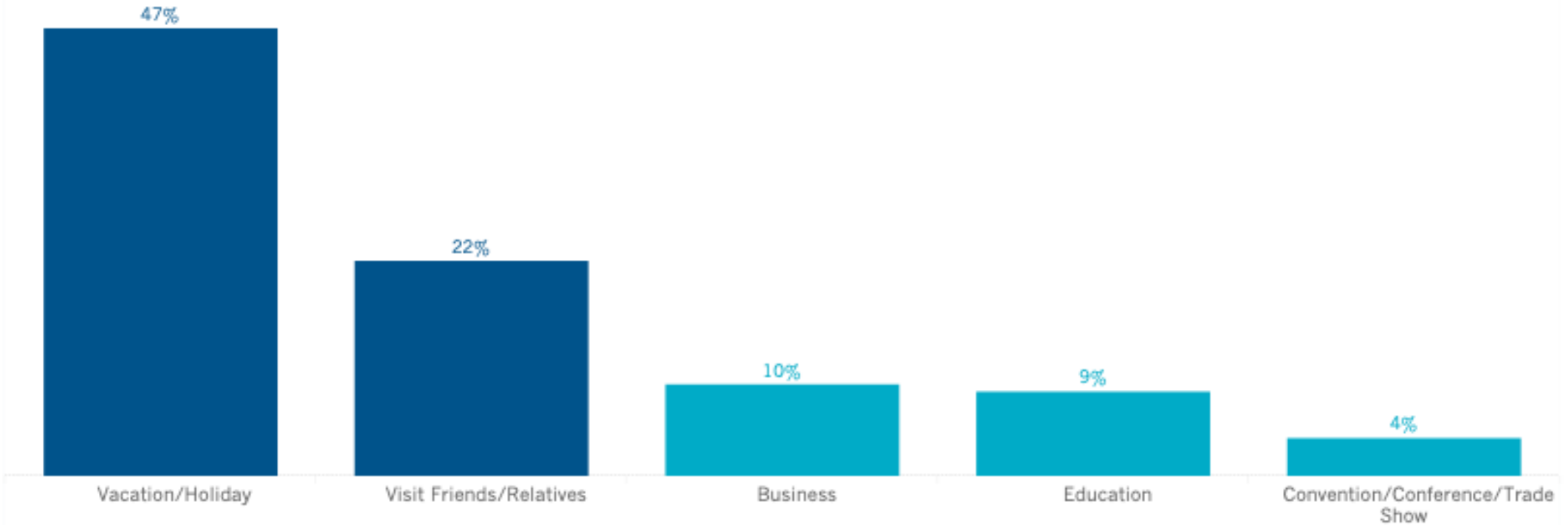
# California Travelers & California Trip Insights

# Main Purpose of Trip

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

## Middle East

### Main Purpose of Trip

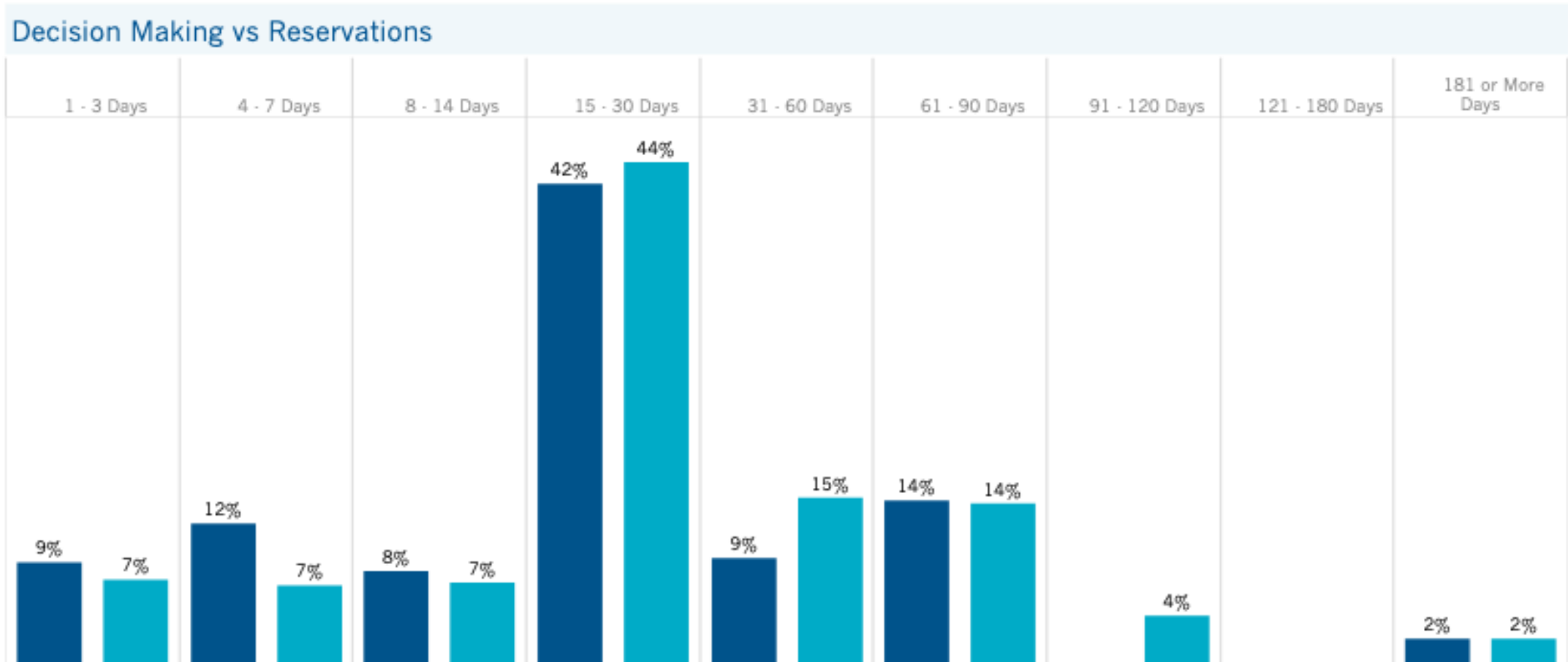




# Decision Making vs Reservations

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

## Middle East



■ 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? (%)

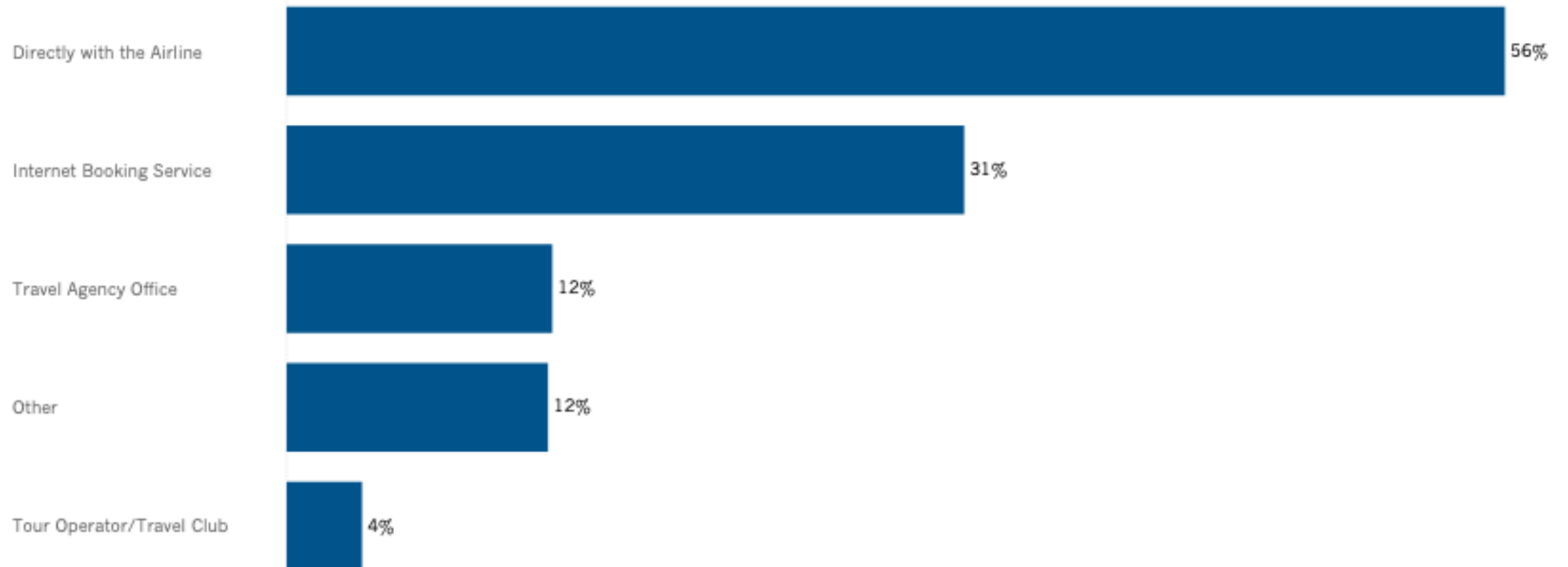


# Airline Reservations

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

## Middle East

### Airline Reservations



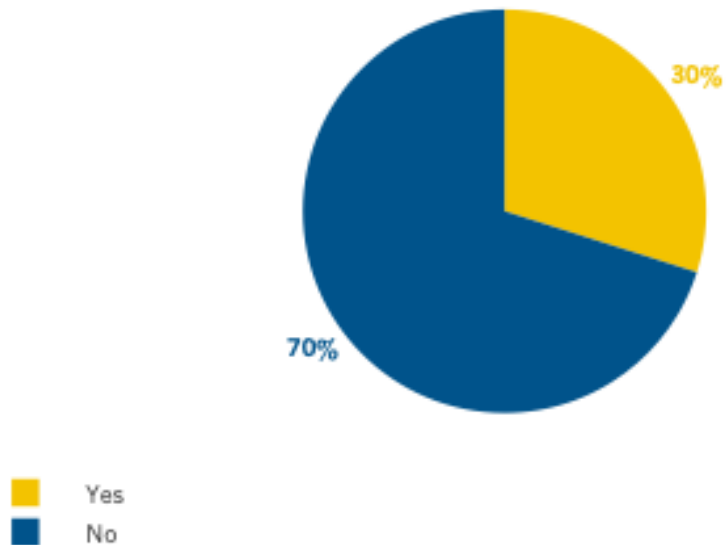


# First/Repeat Visitation, Travel Party Size

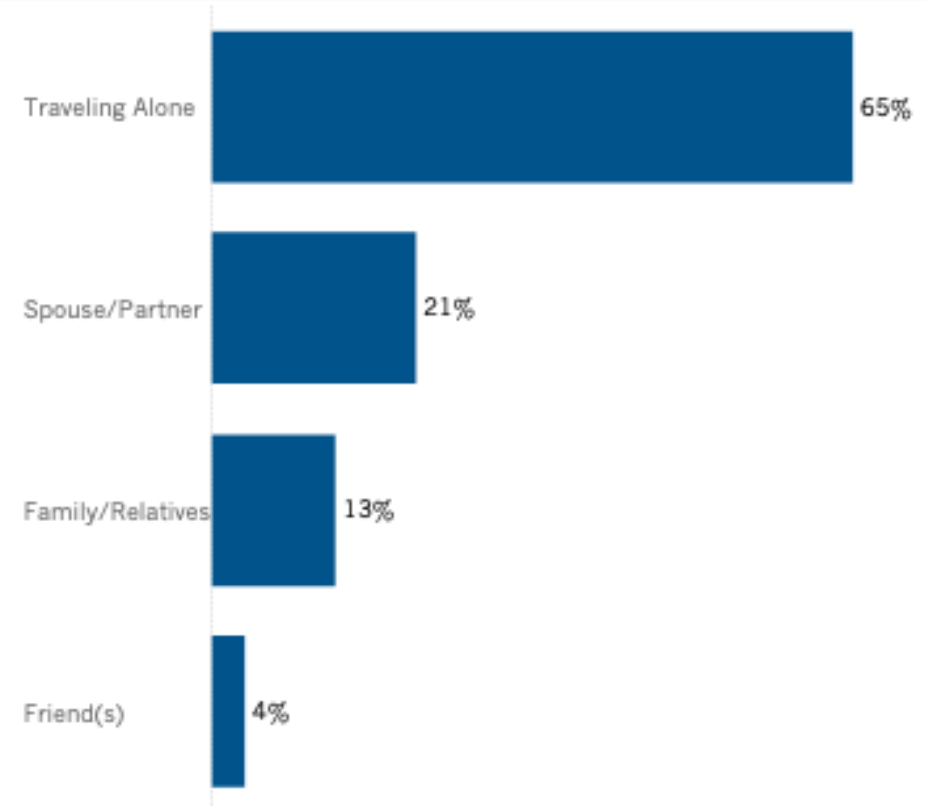
The charts below show first-time and repeat visitation and travel party size among travelers from the focus market.

## Middle East

### First trip to the US



### Travel Companion



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

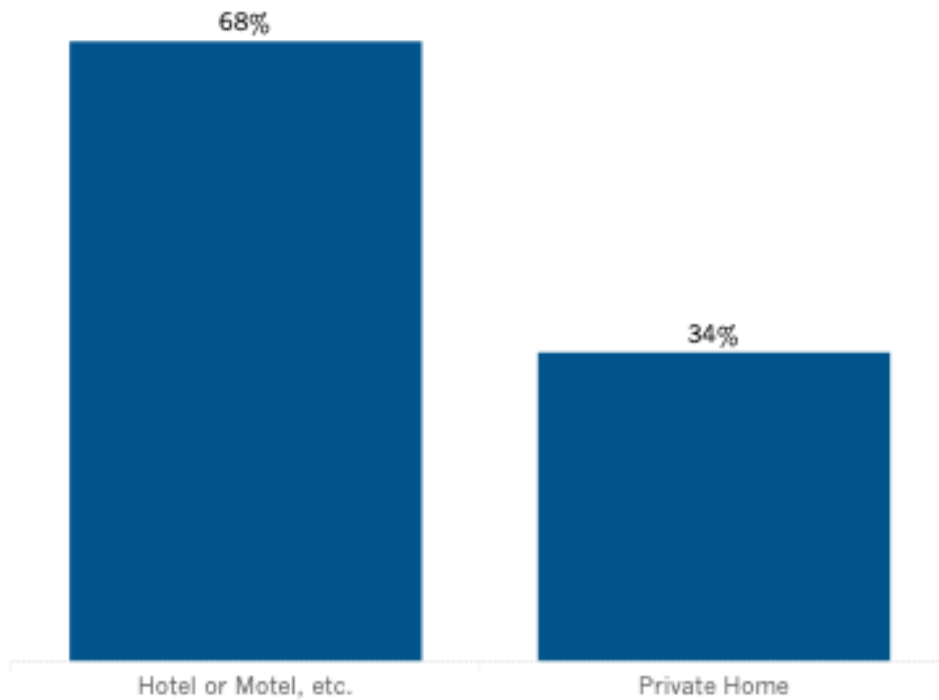


# Types of Accommodations & Nights

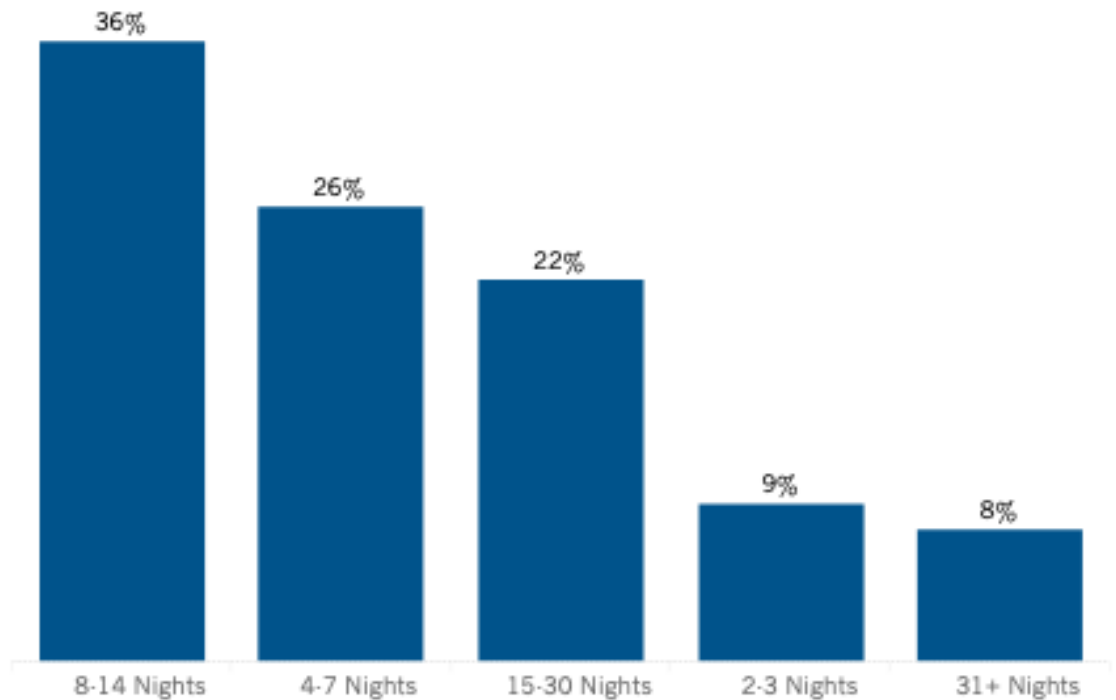
The charts below show types of accommodations stayed in and number of nights in destination among travelers from the focus market.

## Middle East

### Types of Accommodations



### Nights in Destination



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

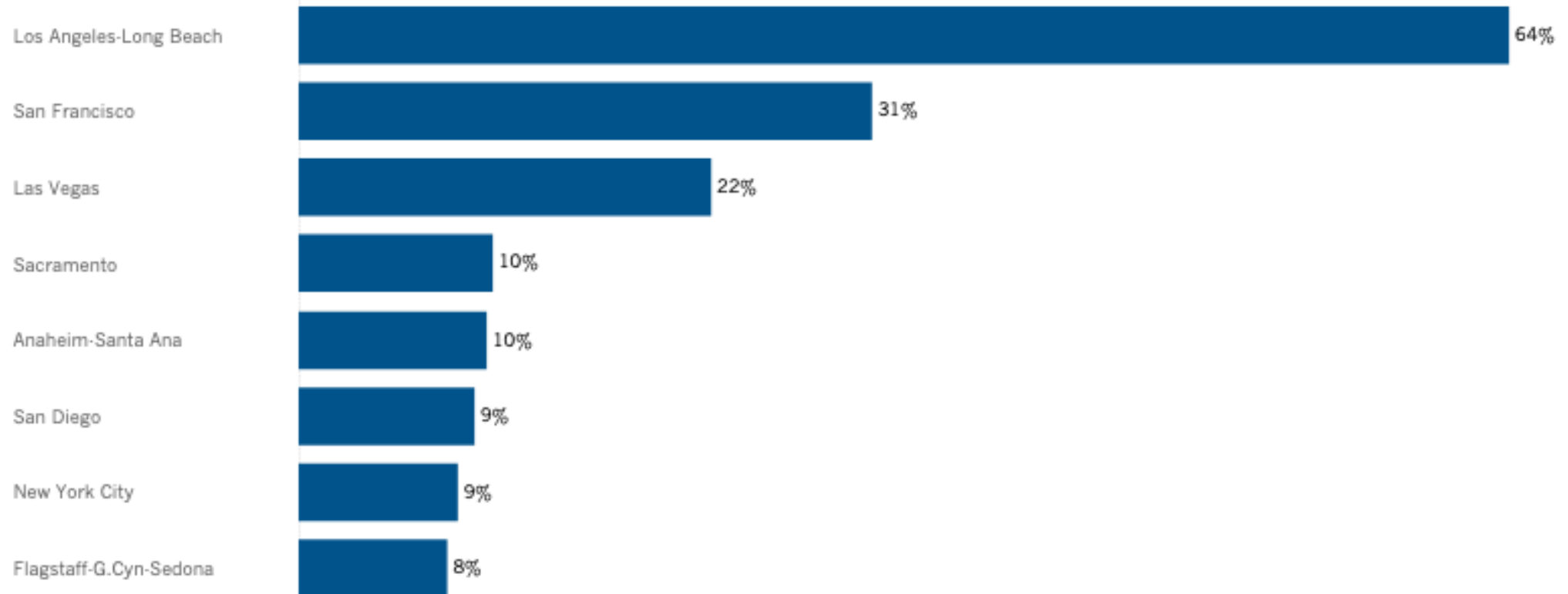


# Destinations visited

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

## Middle East

### US Destinations visited



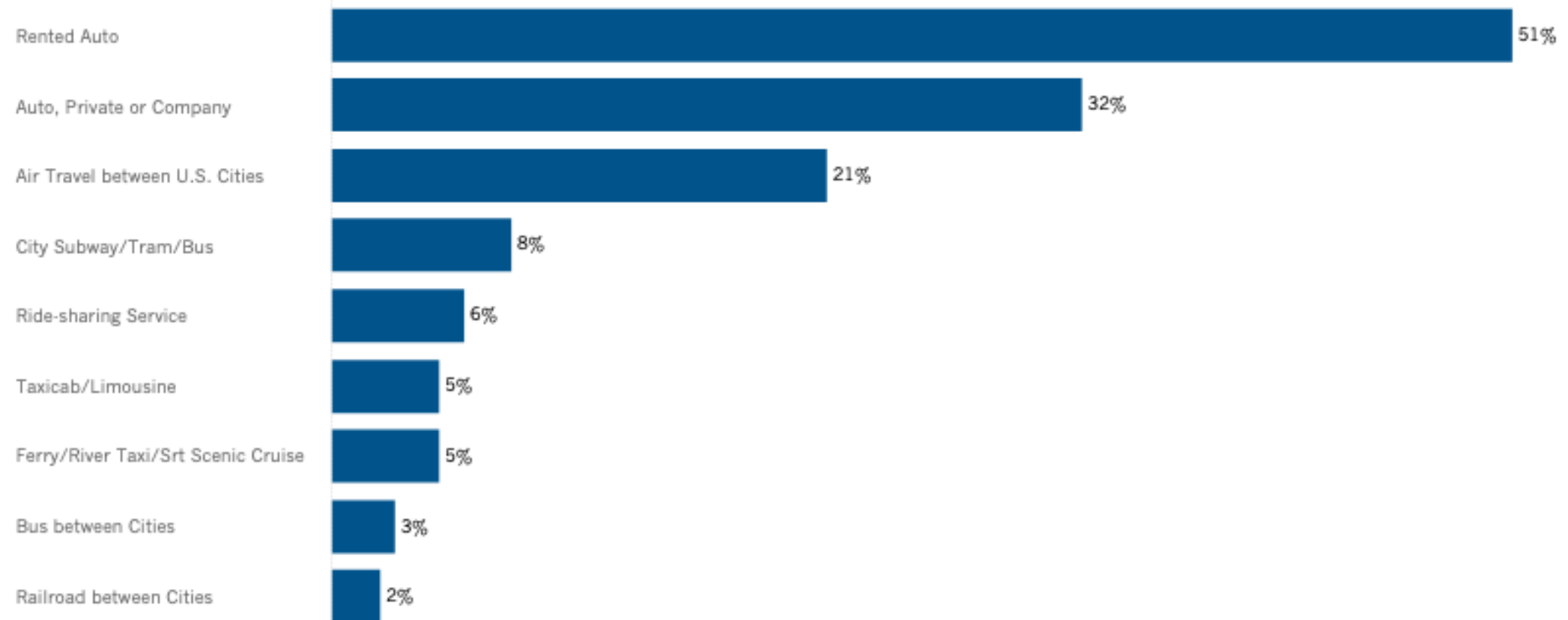


# Transportation

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

## Middle East

### Types of Transportation





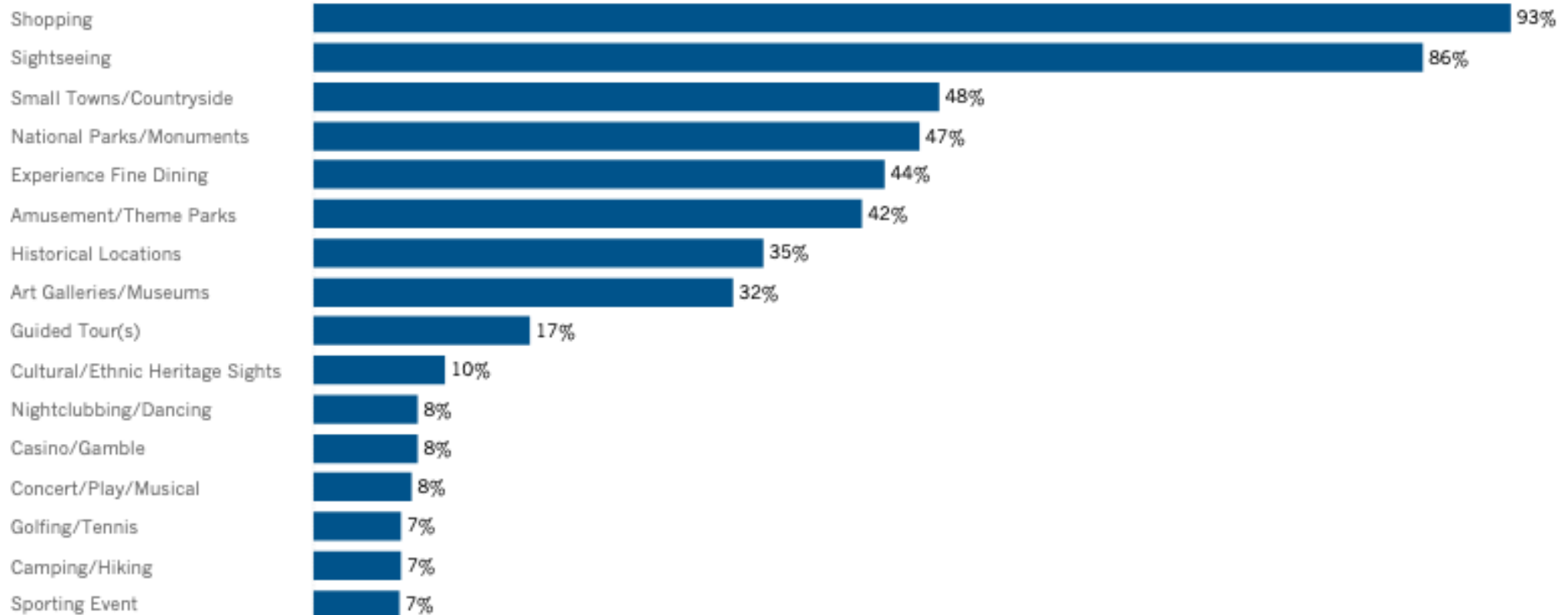


# Activities

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

## Middle East

### Engaged Activities



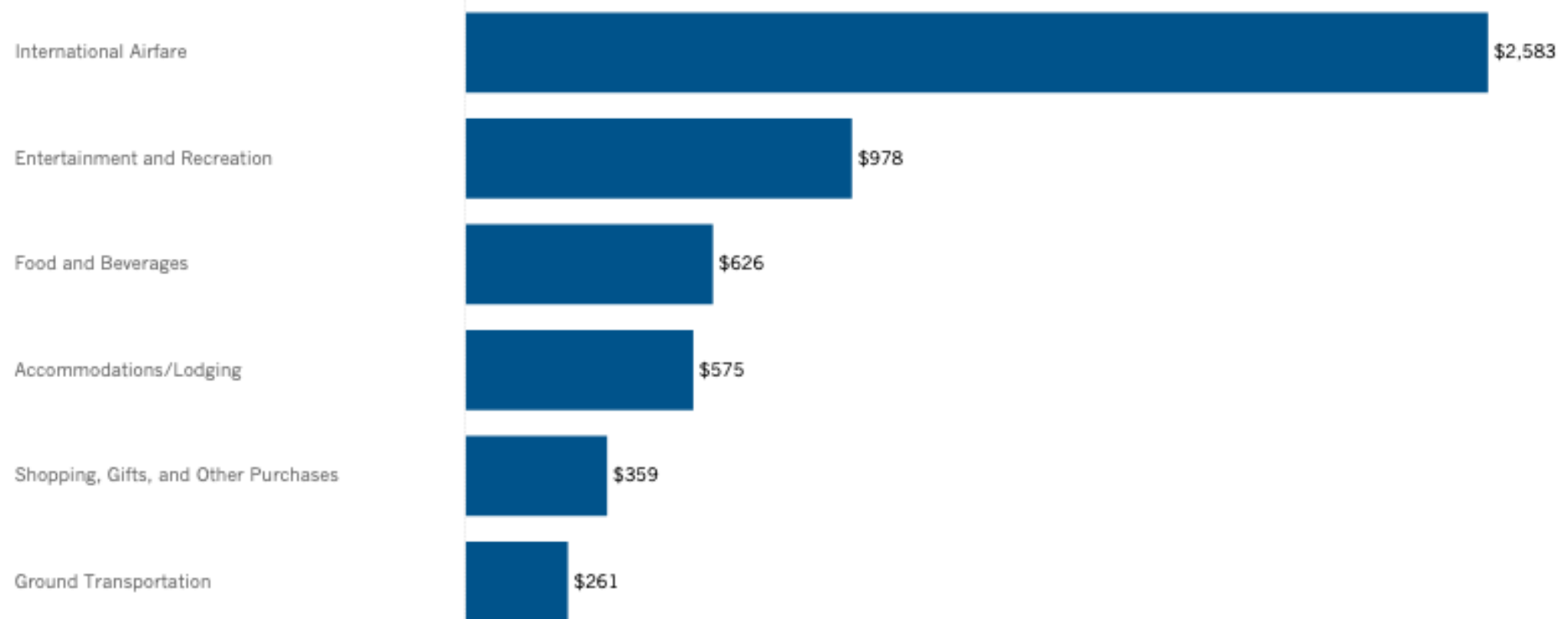


# Expenditures in the US

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

## Middle East

### 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
<b>Audience Profile</b>														
% 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
<b>Generation</b>														
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%
<b>Income</b>														
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%



“CA Traveler Target”

# 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
<b>Trip Type</b>														
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
<b>Traveler Type</b>														
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%
<b>Travel Party</b>														
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
<b>Organizing Travel</b>														
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%
<b>Planning Methods</b>														
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
<b>Accommodation Preference</b>														
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%
<b>Booking Preference</b>														
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
<b>Travel Spending</b>														
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
<b>Advertising Influences</b>														
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
<b>Sports Watched/Followed</b>														
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%