

Global Market Profile

SOUTH KOREA



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

South Korea



POPULATION: *

51.7M

EXCHANGE RATE: **

Local currency to USD dollar

1,442.1

GROSS DOMESTIC PRODUCT (GDP):

Annual % chg ***

2.2%

INFLATION RATE:

Annual % chg ****

2.0%

* www.worldometers.info, 2025

** www.x-rates.com, 2025

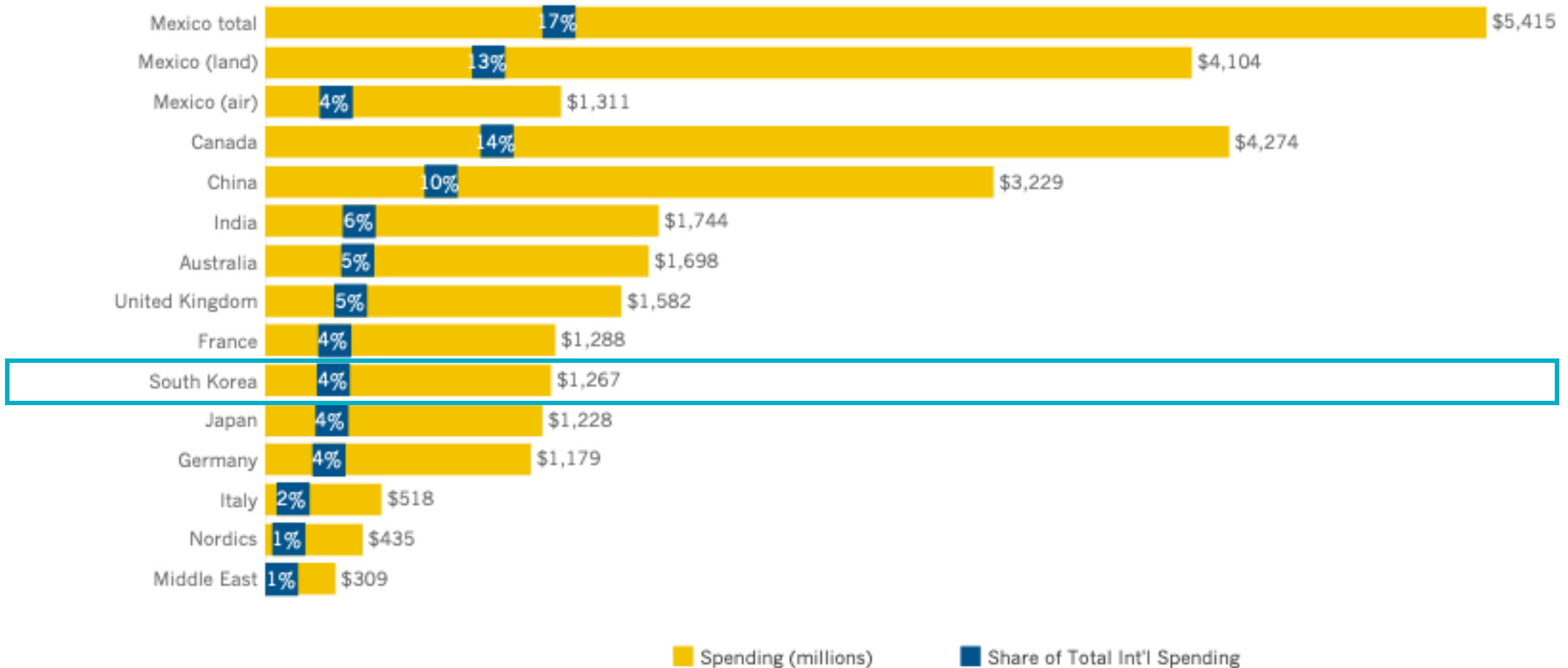
*** www.imf.org, Oct 2024

**** 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.

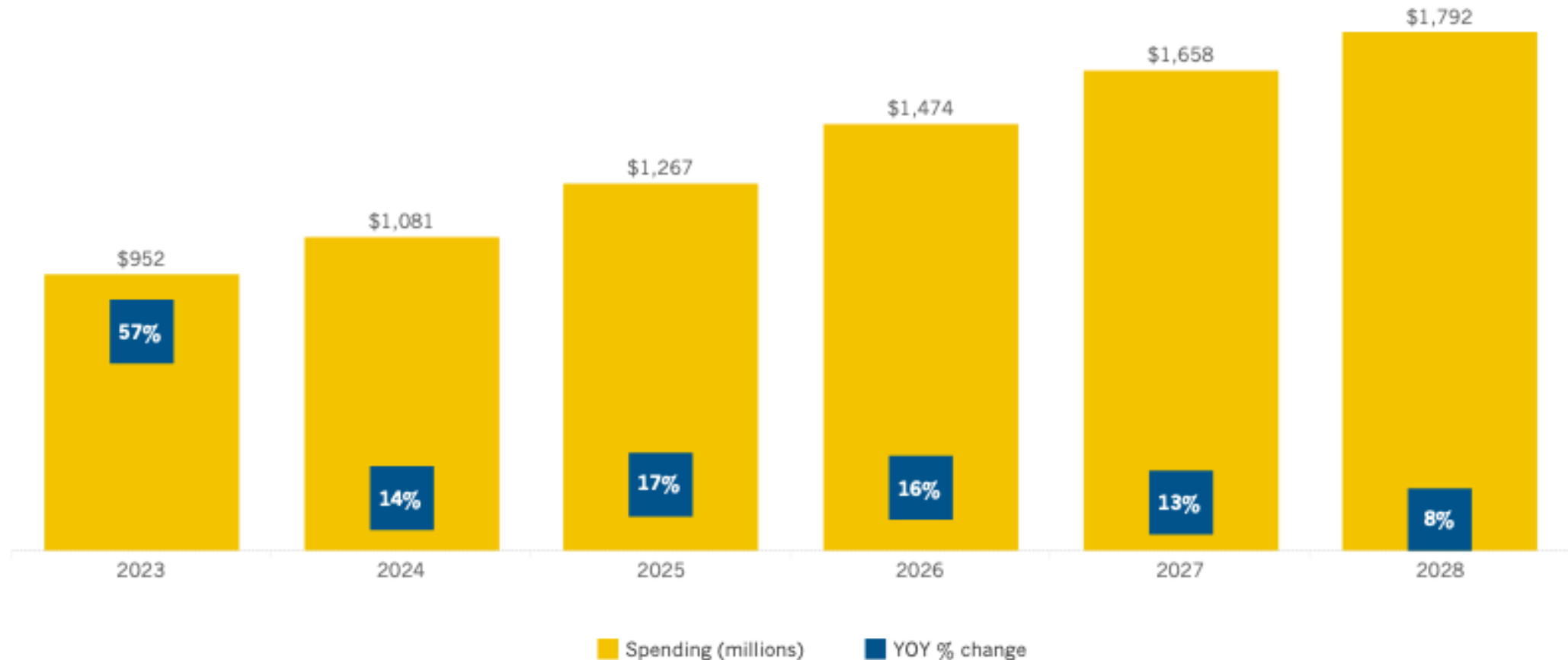
2025 Spending Forecast



Forecast: Visitor Spending

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

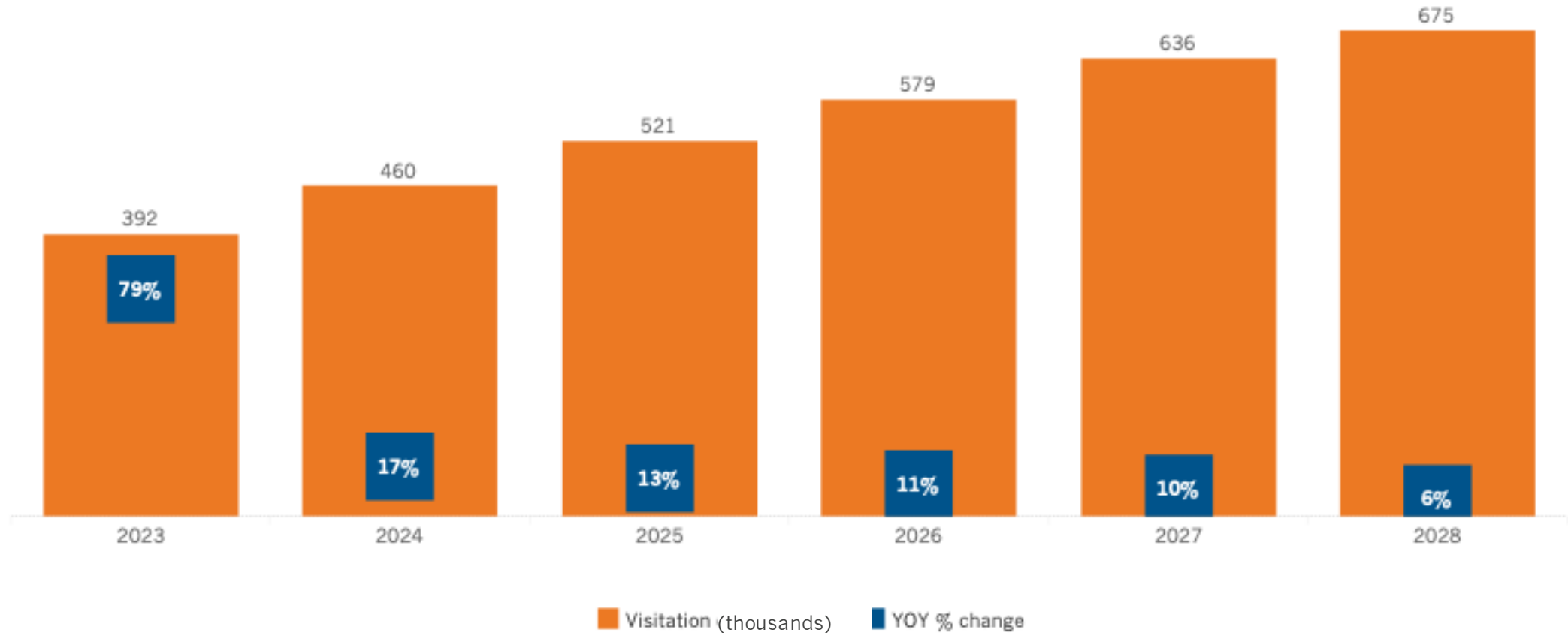
South Korea: Spending Forecast and YOY % change



Forecast: Visitor Volume

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

South Korea: 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) | | South Korea Visitor Spend* (2023) | | |
|-------------------------------|--|--------------|-----------------------------------|--------------|------------|
| | Spending (\$B) | % | Spending (\$B) | % | Index |
| Central Coast | \$0.828 | 3.7% | \$0.021 | 2.2% | 59 |
| Central Valley | \$0.278 | 1.2% | \$0.006 | 0.6% | 50 |
| Deserts | \$0.861 | 3.8% | \$0.010 | 1.0% | 27 |
| Gold Country | \$0.168 | 0.7% | \$0.005 | 0.5% | 68 |
| High Sierra | \$0.238 | 1.1% | \$0.003 | 0.3% | 25 |
| Inland Empire | \$0.308 | 1.4% | \$0.011 | 1.1% | 82 |
| Los Angeles | \$8.113 | 36.0% | \$0.396 | 41.6% | 116 |
| North Coast | \$0.037 | 0.2% | \$0.000 | 0.0% | 17 |
| Orange County | \$2.219 | 9.8% | \$0.128 | 13.5% | 137 |
| San Diego | \$3.062 | 13.6% | \$0.068 | 7.1% | 52 |
| San Francisco Bay Area | \$6.407 | 28.4% | \$0.305 | 32.0% | 113 |
| Shasta Cascade | \$0.030 | 0.1% | \$0.001 | 0.1% | 45 |
| Total California | \$22.549 | 100% | \$0.952 | 100% | |

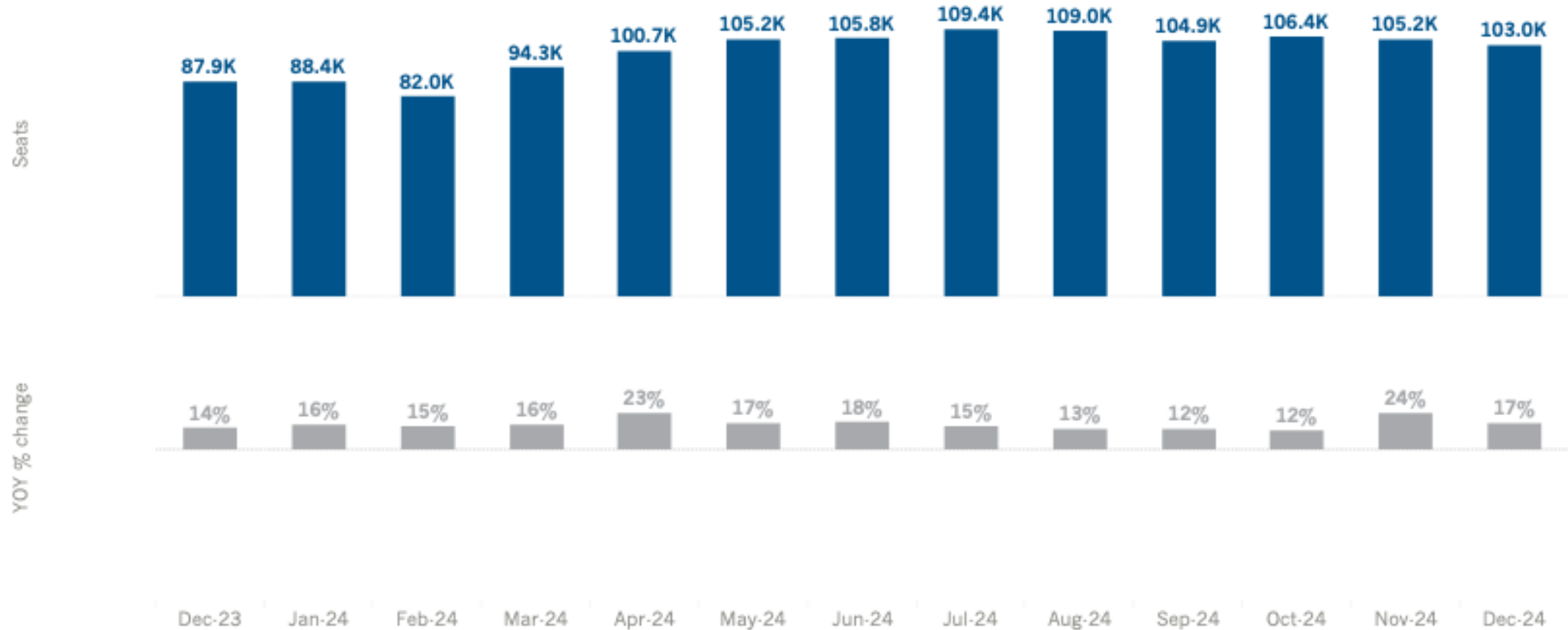
*Regional visitor spending for the focus market is estimated using a Visit California proprietary model that adjusts statewide visitor spending estimates for the focus market to the region-level using Visa Destination Insights credit card data. The index shown compares the regional share of spending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

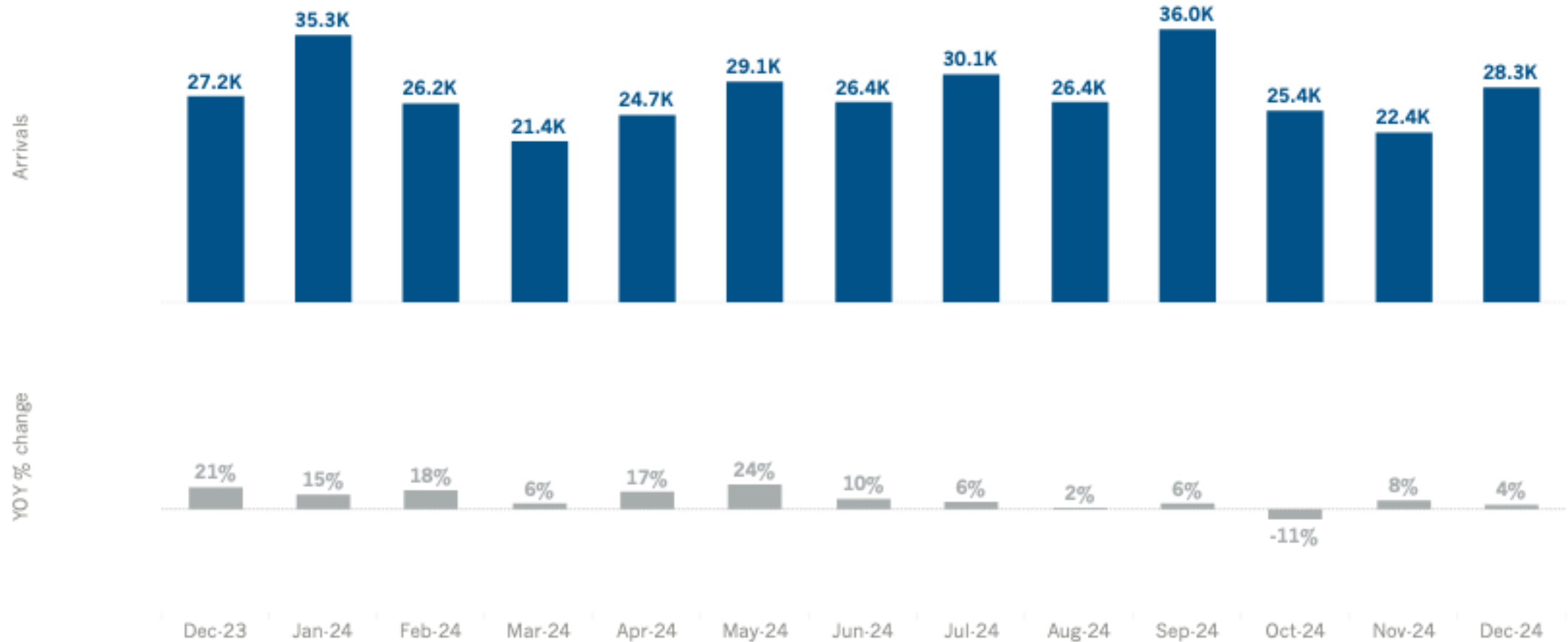
South Korea: Non-Stop Seats



Non-Resident Arrivals to California

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

South Korea: Non-Resident Arrivals at Ports of Entry

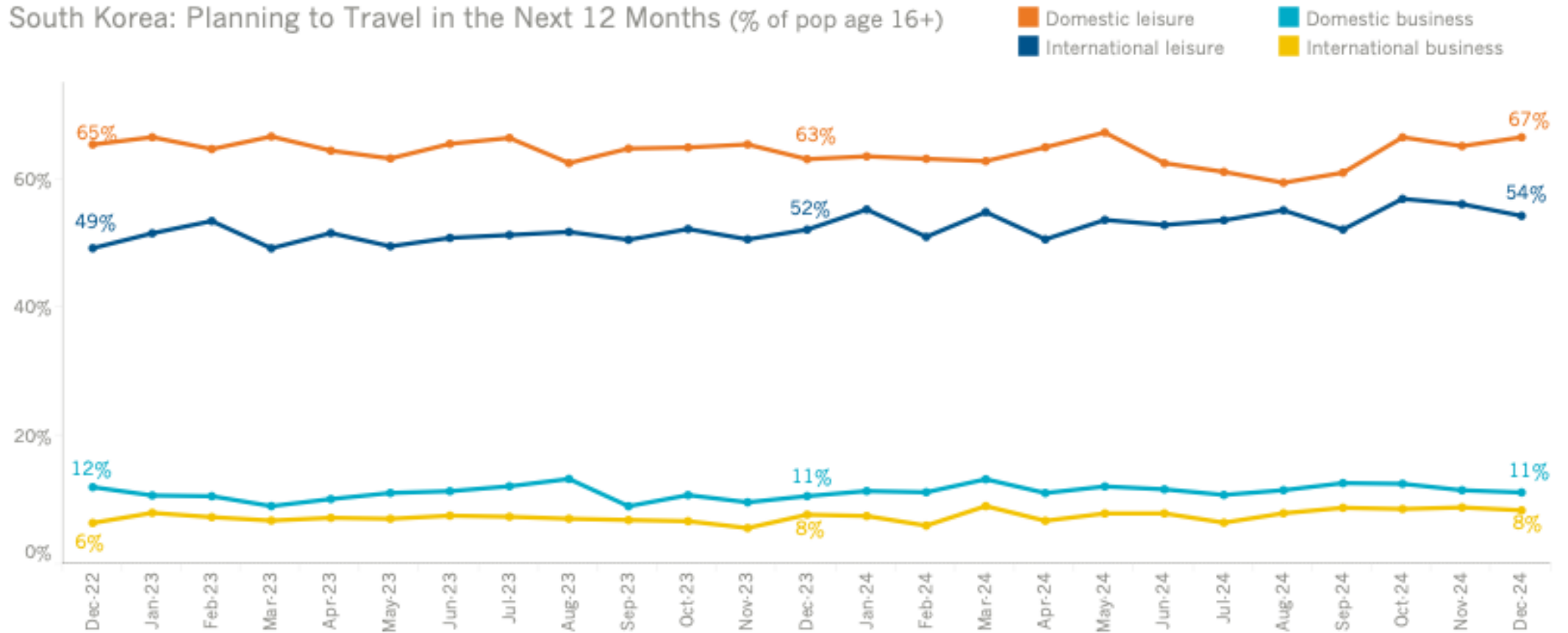


California's Int'l Market Share (Visits)

| | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
|-----------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|
| 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.



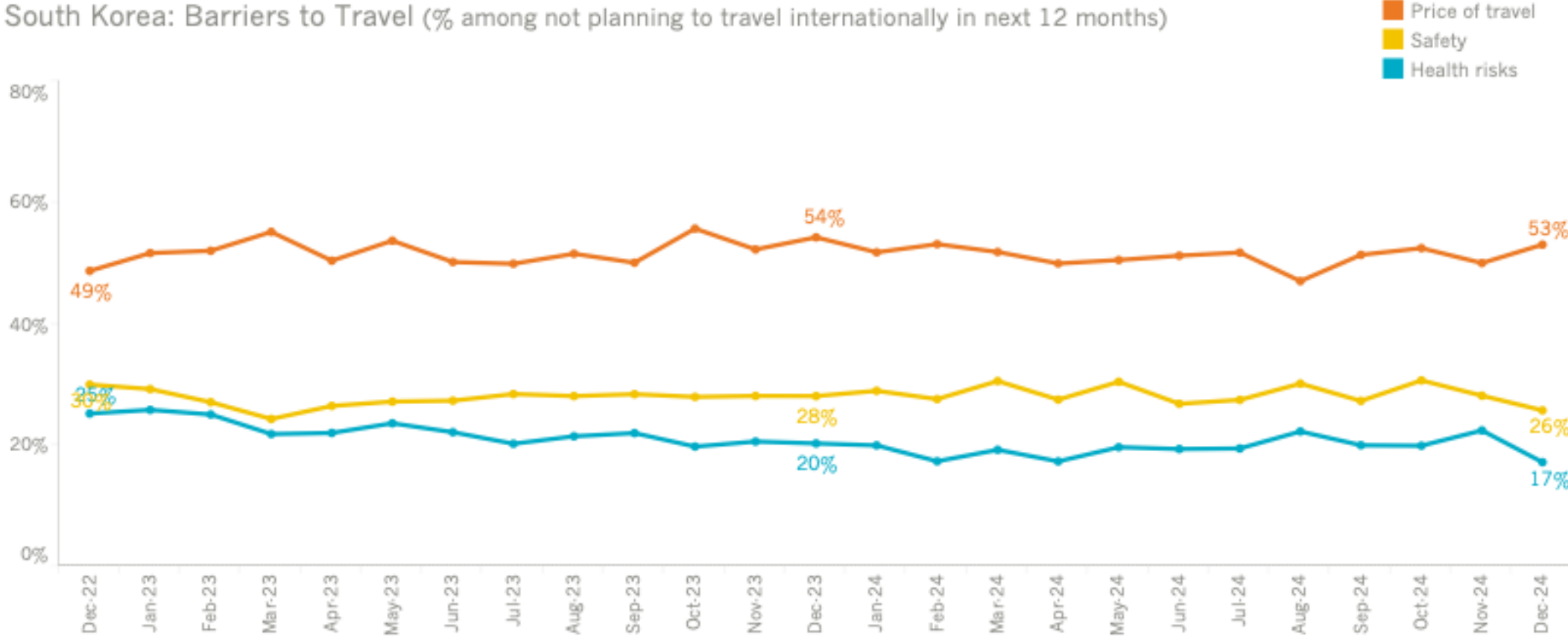
Q: Which, if any, of the following trips are you planning to take in the next 12 months?

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.



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.

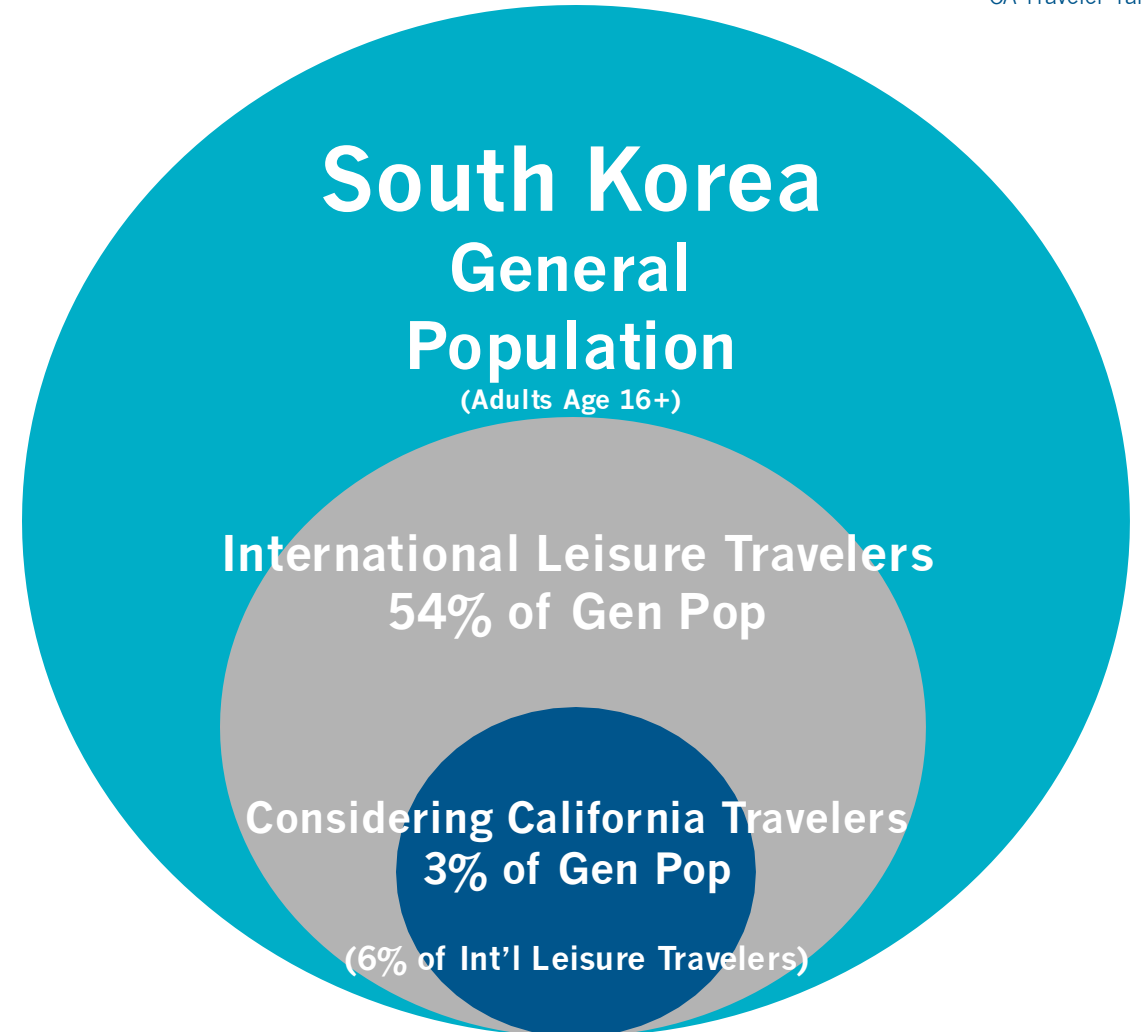
Definitions:

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.

South Korea

| Gender | | |
|--------|--------------------|-------|
| | CA Traveler Target | Index |
| Female | 41% | 86 |
| Male | 59% | 112 |

| Marital Status | | |
|----------------|--------------------|-------|
| | CA Traveler Target | Index |
| Married | 53% | 92 |
| Single | 44% | 114 |

| Age | | |
|-----------|--------------------|-------|
| | CA Traveler Target | Index |
| Age 16-24 | 12% | 110 |
| Age 25-34 | 30% | 118 |
| Age 35-44 | 26% | 102 |
| Age 45-54 | 18% | 81 |
| Age 55+ | 15% | 88 |

| Generation | | |
|-------------|--------------------|-------|
| | CA Traveler Target | Index |
| Gen Z | 12% | 110 |
| Millennial | 48% | 108 |
| Gen X | 32% | 92 |
| Baby Boomer | 8% | 84 |

| Income* | | |
|-------------------|--------------------|-------|
| | CA Traveler Target | Index |
| Higher income | 55% | 117 |
| Middle income | 40% | 86 |
| Lower income | 5% | 73 |
| Prefer not to say | 0% | |

| Region | | |
|----------|--------------------|-------|
| | CA Traveler Target | Index |
| Seoul | 37% | 117 |
| Gyeonggi | 22% | 95 |
| Busan | 8% | 107 |
| Incheon | 6% | 87 |
| Daegu | 5% | 87 |
| Daejeon | 4% | 115 |
| Gyeongbu | 3% | 88 |
| Chungnam | 3% | 103 |
| Jeonbuk | 2% | 147 |
| Gwangju | 2% | 52 |

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



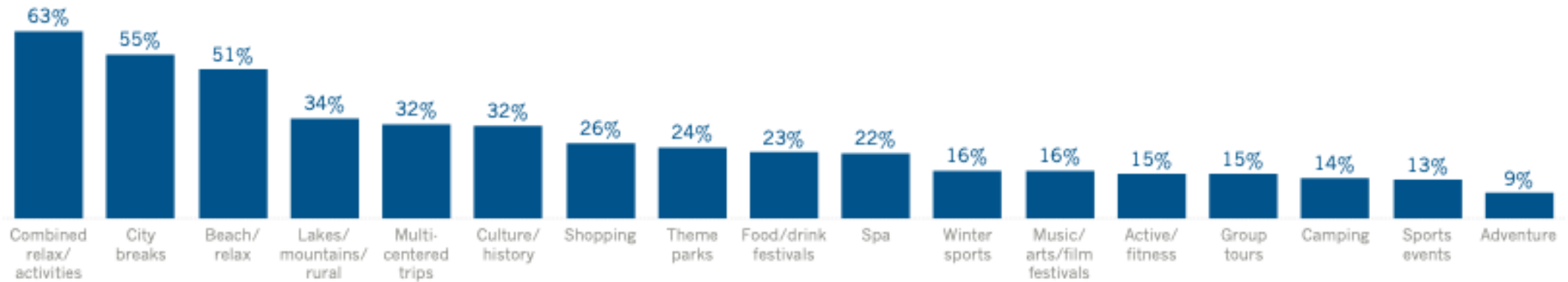
Int'l leisure travelers
considering
California
"CA Traveler Target"

Trip Preferences/Characteristics

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

South Korea

Trip Type



Traveler Type

| | CA Traveler Target | Index |
|---------------|--------------------|-------|
| Budget | 25% | 87 |
| Responsible | 21% | 116 |
| Adventurous | 16% | 116 |
| Luxury | 15% | 142 |
| All-inclusive | 9% | 85 |

Travel Party (from most recent vacation)

| | CA Traveler Target | Index |
|-----------------|--------------------|-------|
| My partner | 51% | 97 |
| My children | 37% | 107 |
| Other family | 29% | 108 |
| Friend(s) | 26% | 98 |
| Other person(s) | 8% | 142 |
| Solo | 7% | 125 |

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)



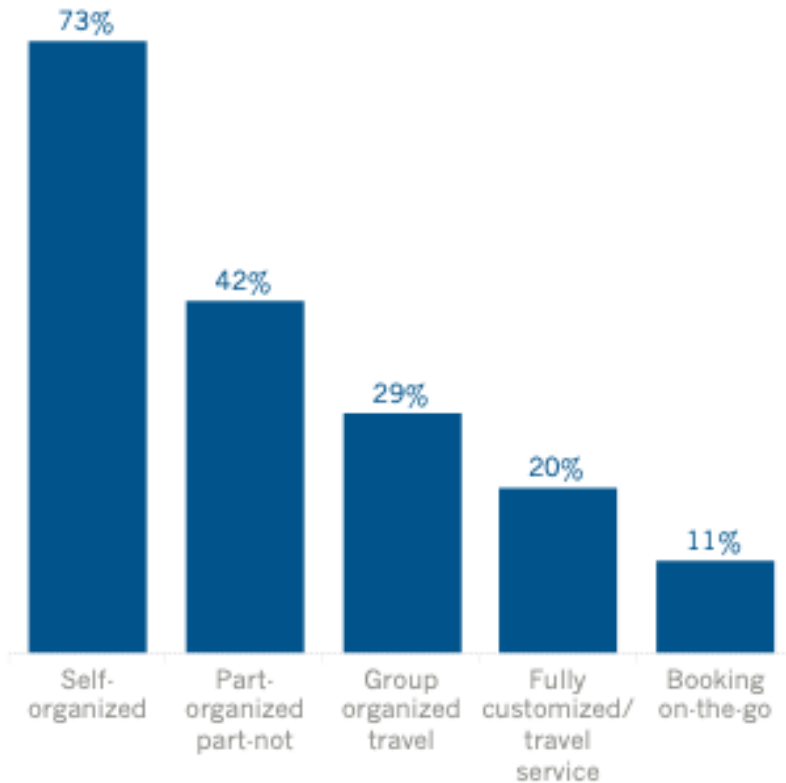
Int'l leisure travelers
considering
California
"CA Traveler Target"

Organizing/Planning Methods

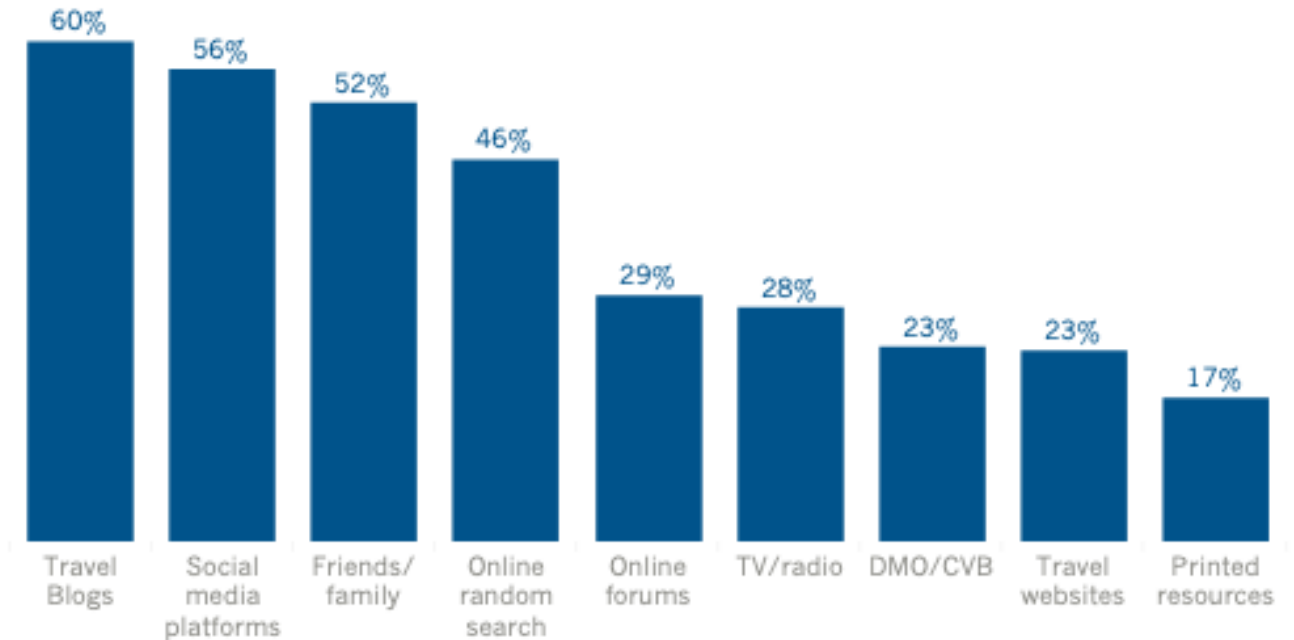
The chart below shows the organizing and planning methods of the consumer target in the focus market.

South Korea

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)



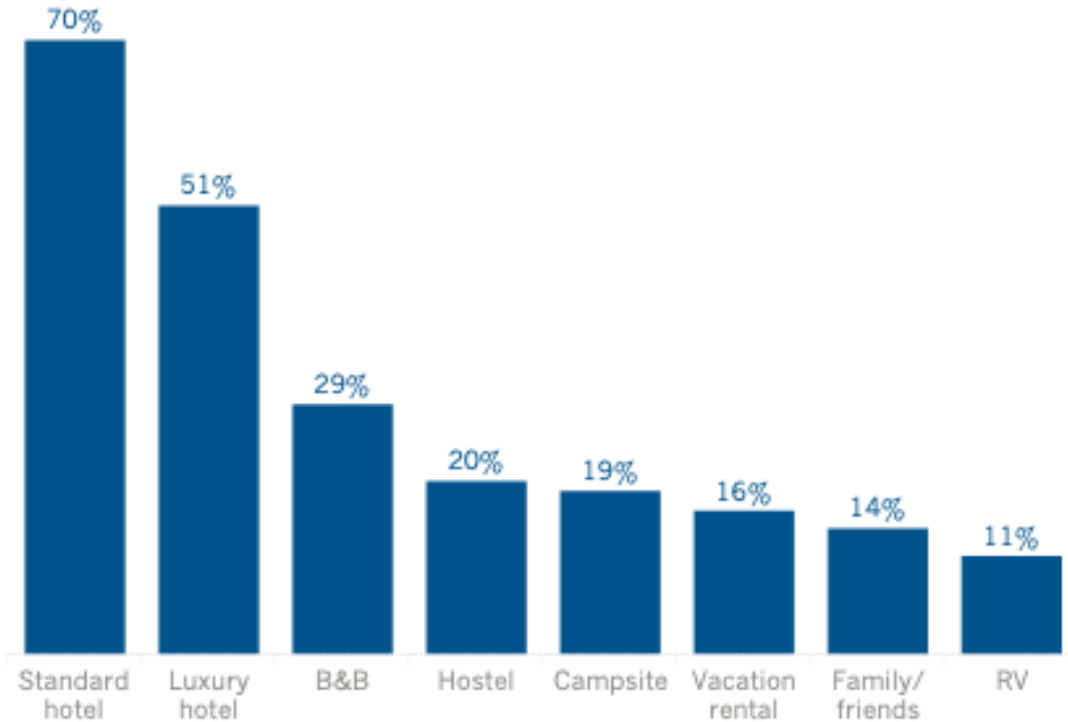
Int'l leisure travelers
considering
California
"CA Traveler Target"

Booking Preferences

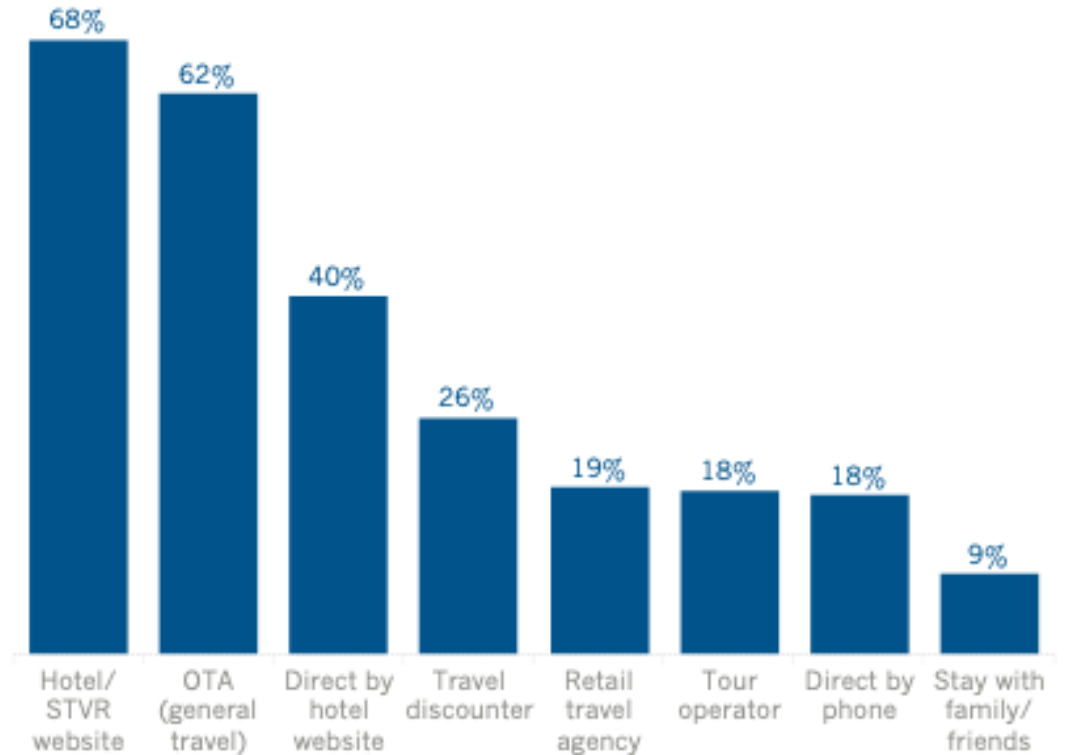
The chart below shows the accommodation preferences of the consumer target in the focus market.

South Korea

Accommodation Preferences



Booking Preferences





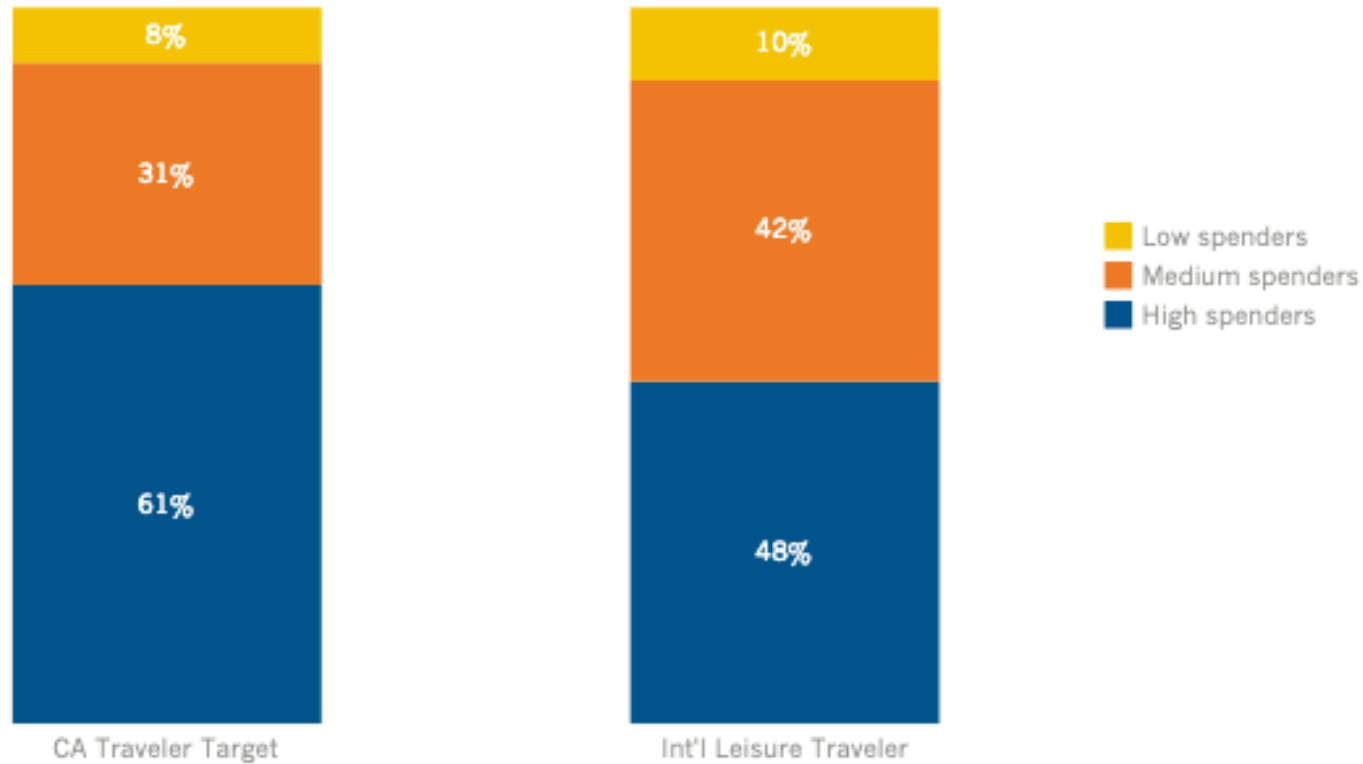
Int'l leisure travelers
considering
California
"CA Traveler Target"

Travel Spending

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

South Korea

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.

South Korea

Advertising Influences

| | CA Traveler Target | Index |
|-------------------------------|--------------------|-------|
| Social media | 51% | 124 |
| TV - Free to view channels | 44% | 139 |
| Online streaming services | 42% | 115 |
| Travel websites | 38% | 128 |
| Public transport | 28% | 164 |
| Billboards | 26% | 130 |
| Cinema | 24% | 129 |
| Magazines (digital) | 22% | 184 |
| National newspaper (digital) | 20% | 168 |
| Local newspaper (digital) | 20% | 166 |
| TV - paid/subscription | 19% | 165 |
| Direct mail | 18% | 175 |
| Local newspaper (physical) | 13% | 155 |
| Magazines (physical) | 13% | 166 |
| Podcast | 11% | 167 |
| National newspaper (physical) | 10% | 172 |
| Radio | 9% | 189 |

Sports Watched/Followed

| | CA Traveler Target | Index |
|---------------------------|--------------------|-------|
| Soccer/Football | 42% | 139 |
| Baseball | 42% | 133 |
| Golf | 30% | 144 |
| Basketball | 26% | 165 |
| Swimming | 24% | 145 |
| Tennis | 22% | 184 |
| Running/Marathon | 19% | 183 |
| Volleyball | 16% | 156 |
| Cycling | 12% | 212 |
| Boxing | 12% | 254 |
| Athletics/Track & Field | 12% | 229 |
| Gymnastics | 9% | 183 |
| NFL | 8% | 258 |
| Surfing | 7% | 219 |
| Australian Rules Football | 7% | 397 |
| Rugby League | 6% | 294 |
| Ice Hockey | 5% | 238 |
| Horse Racing | 5% | 202 |
| Cricket | 4% | 311 |

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)



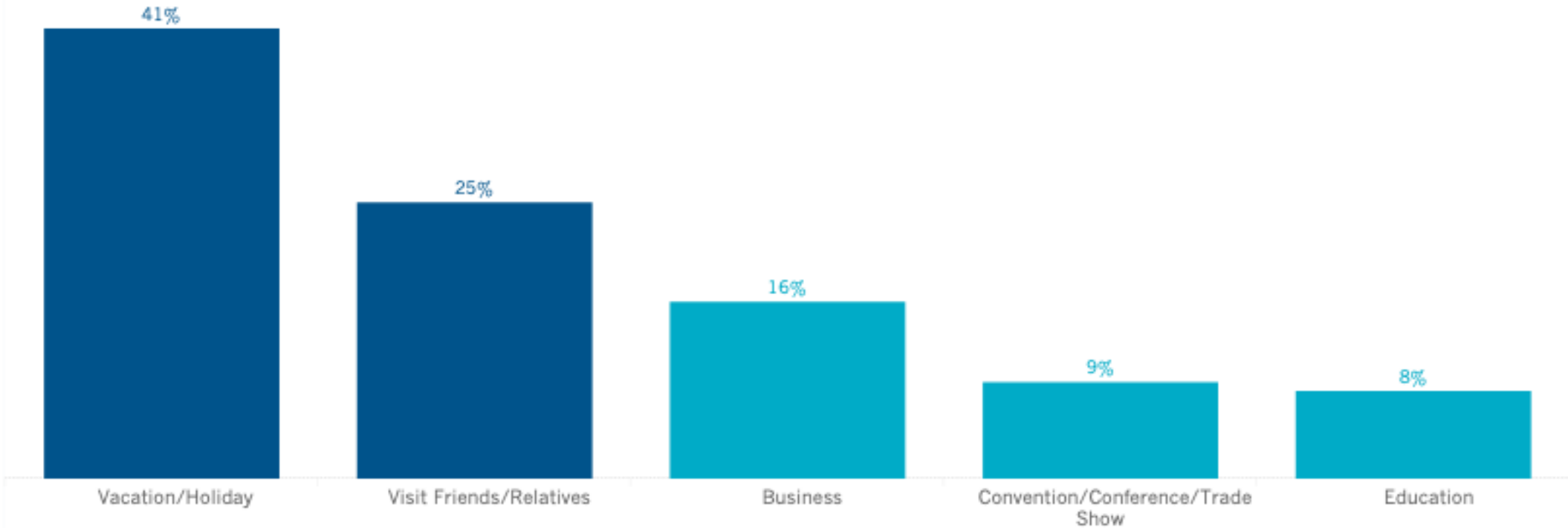
California Travelers & California Trip Insights

Main Purpose of Trip

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

South Korea

Main Purpose of Trip

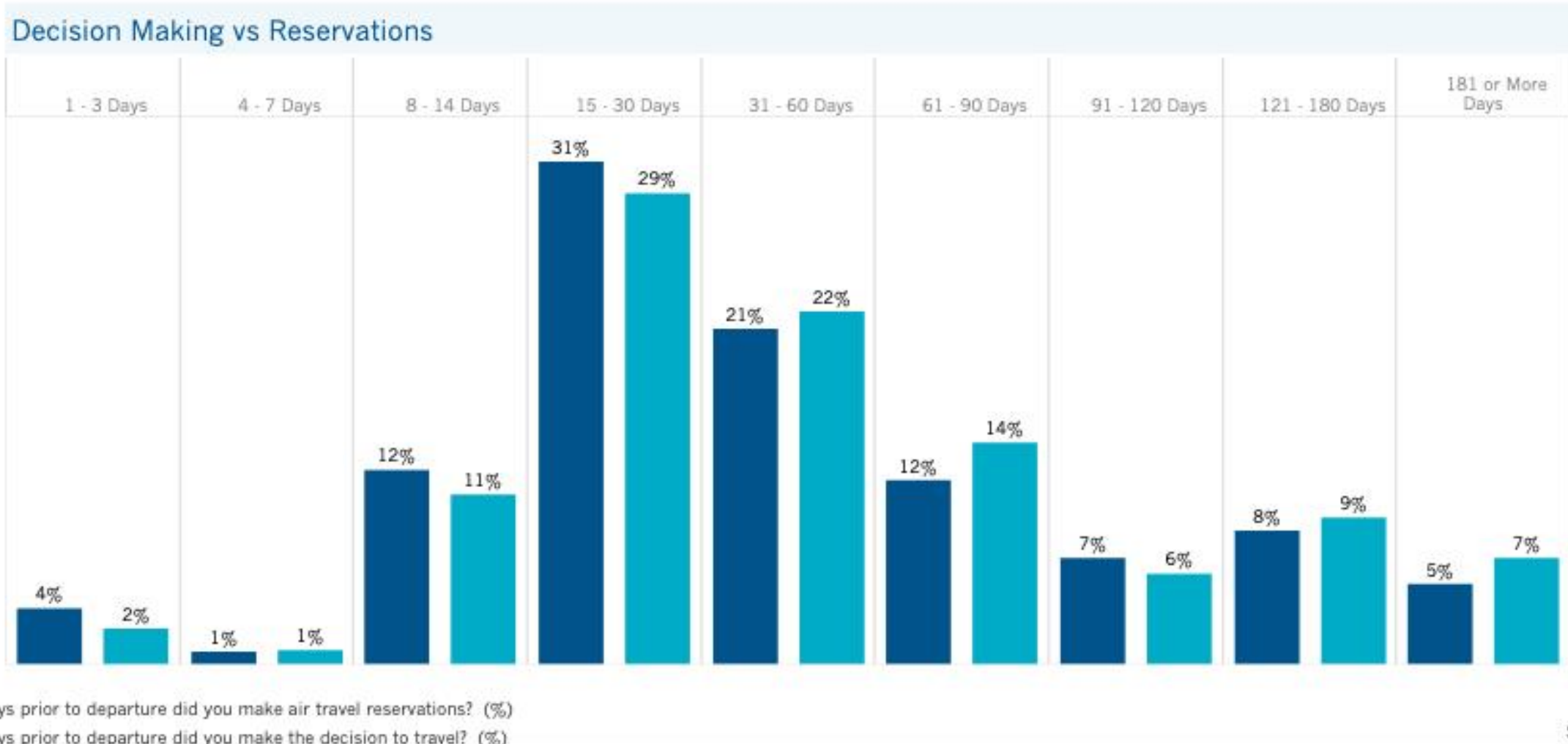




Decision Making vs Reservations

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

South Korea





Airline Reservations

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

South Korea

Airline Reservations

Directly with the Airline

56%

Internet Booking Service

27%

Tour Operator/Travel Club

13%

Travel Agency Office

8%

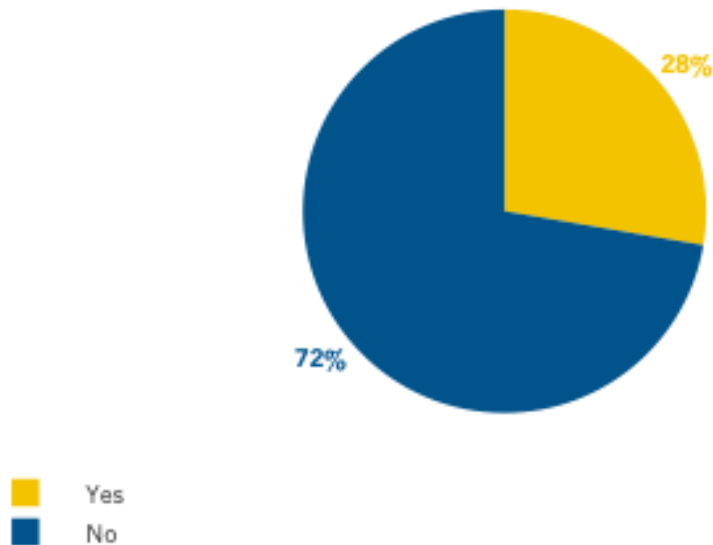


First/Repeat Visitation, Travel Party Size

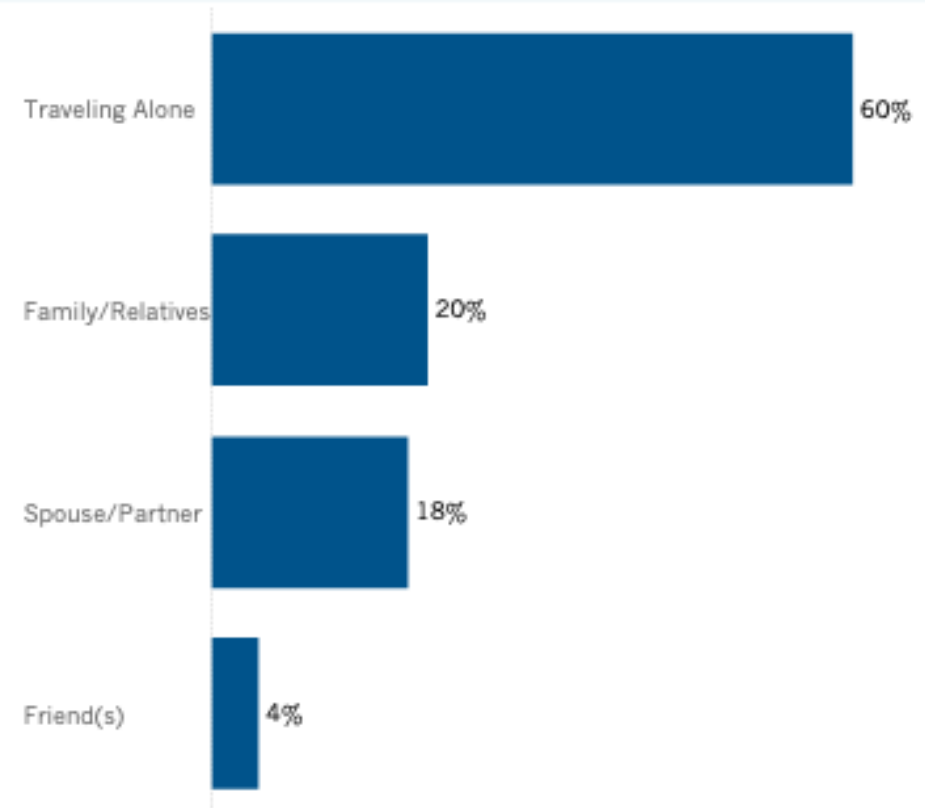
The charts below show first-time and repeat visitation and travel party size among travelers from the focus market.

South Korea

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?

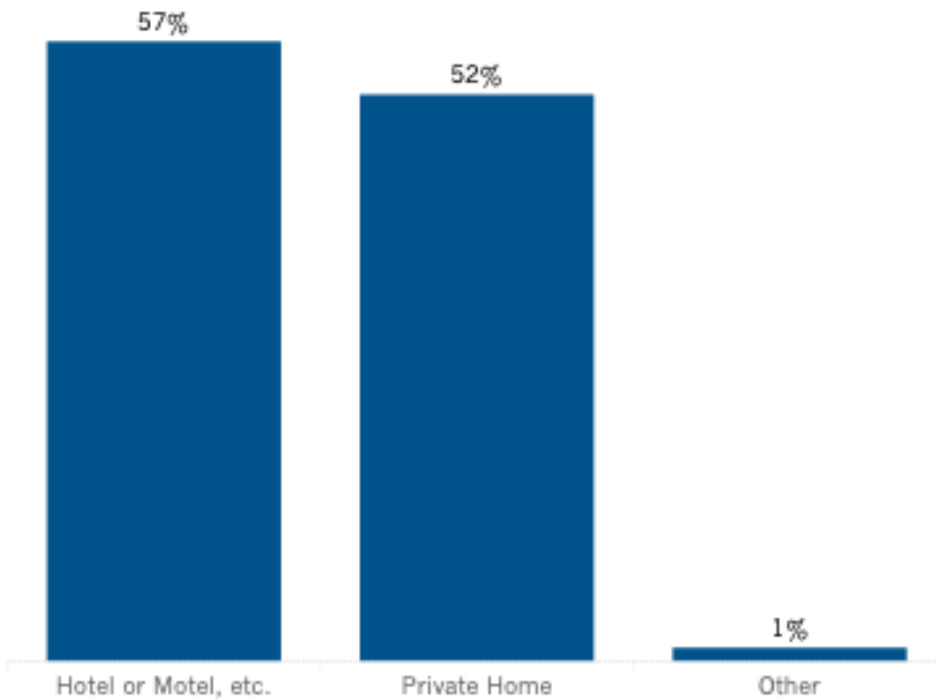


Types of Accommodations & Nights

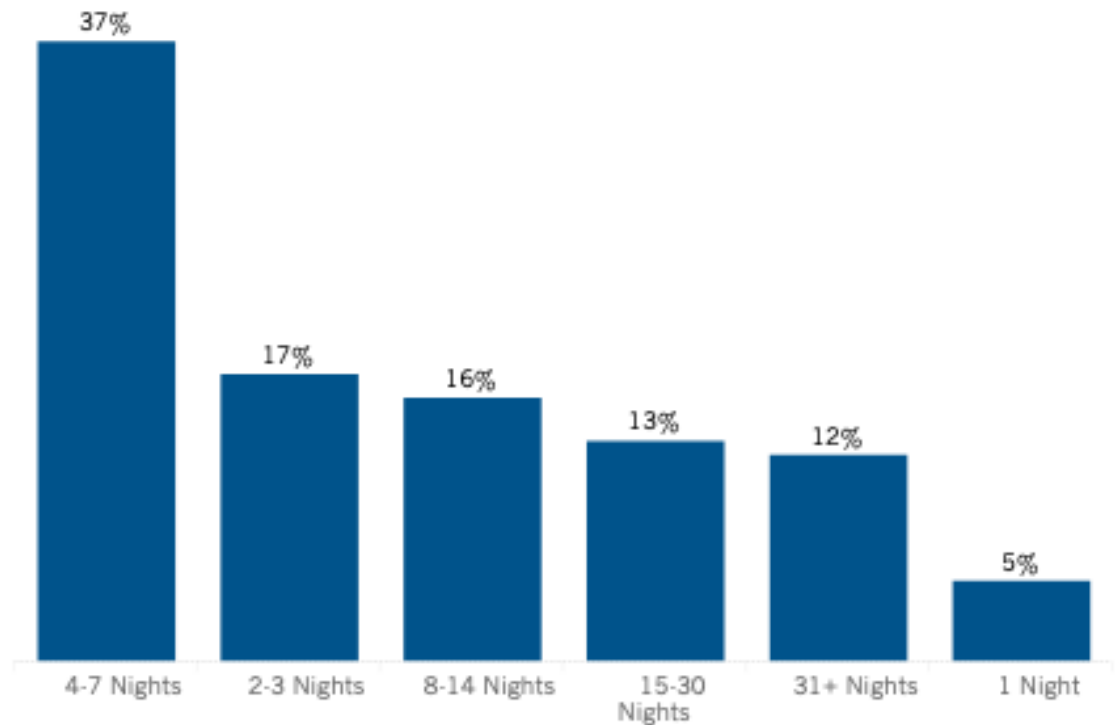
The charts below show types of accommodations stayed in and number of nights in destination among travelers from the focus market.

South Korea

Types of Accommodations



Nights in Destination



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

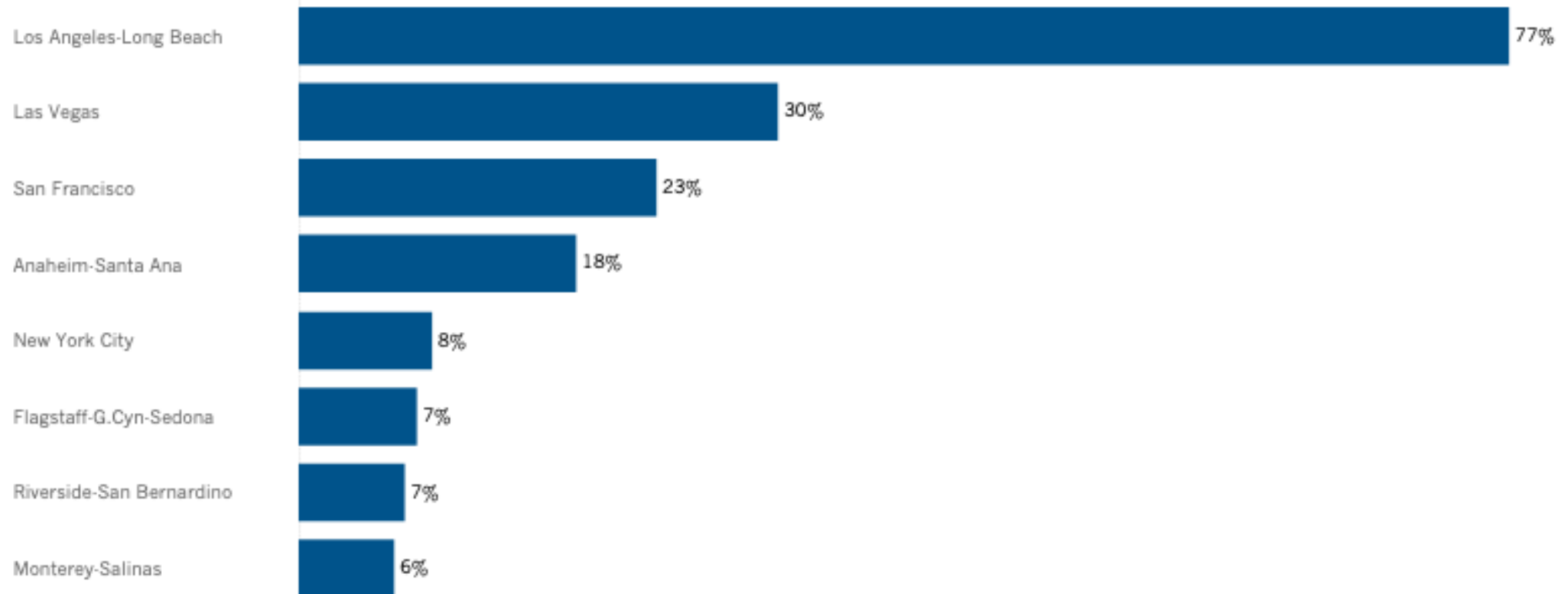


Destinations Visited

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

South Korea

US Destinations visited



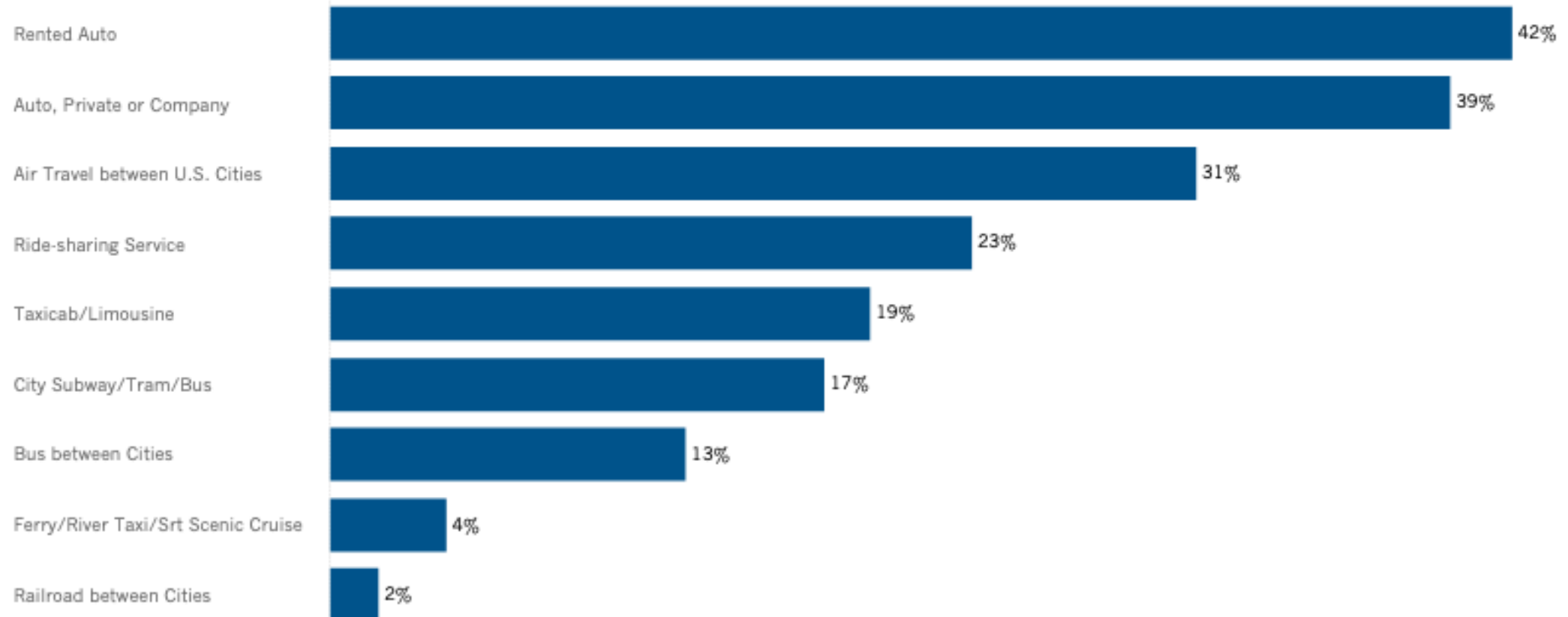


Transportation

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

South Korea

Types of Transportation



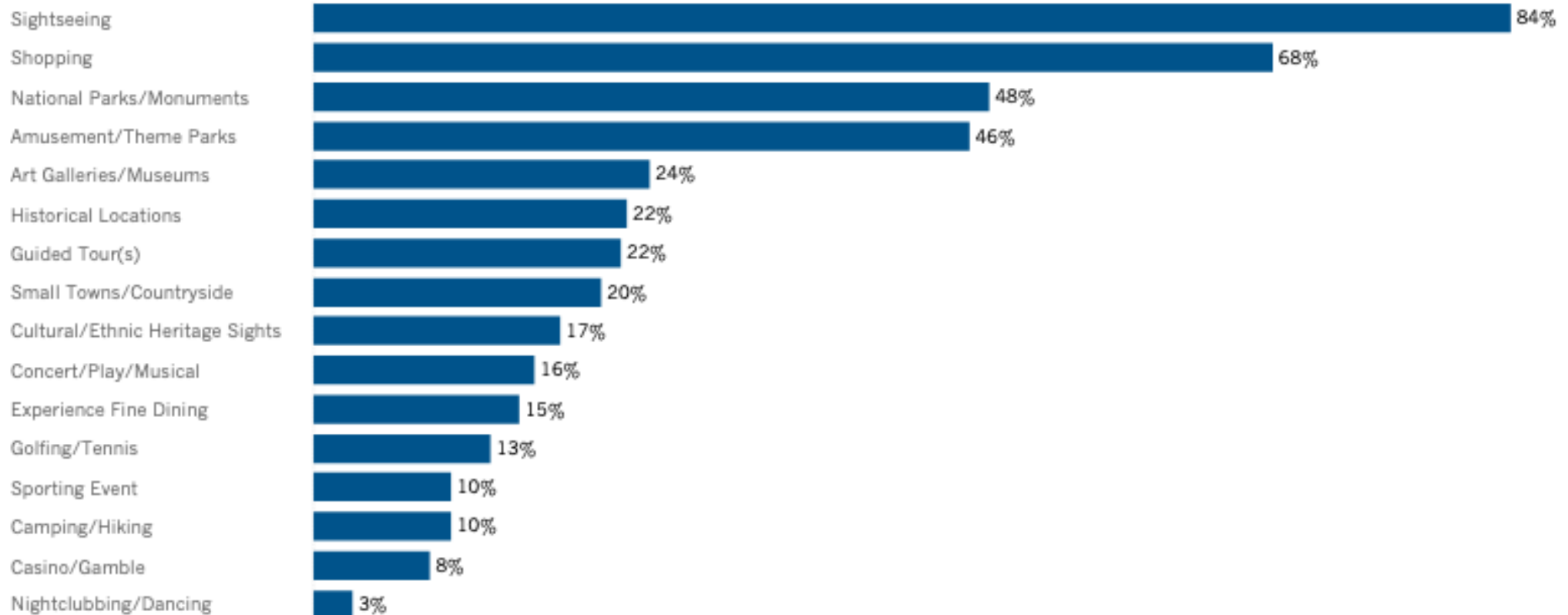


Activities

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

South Korea

Engaged Activities



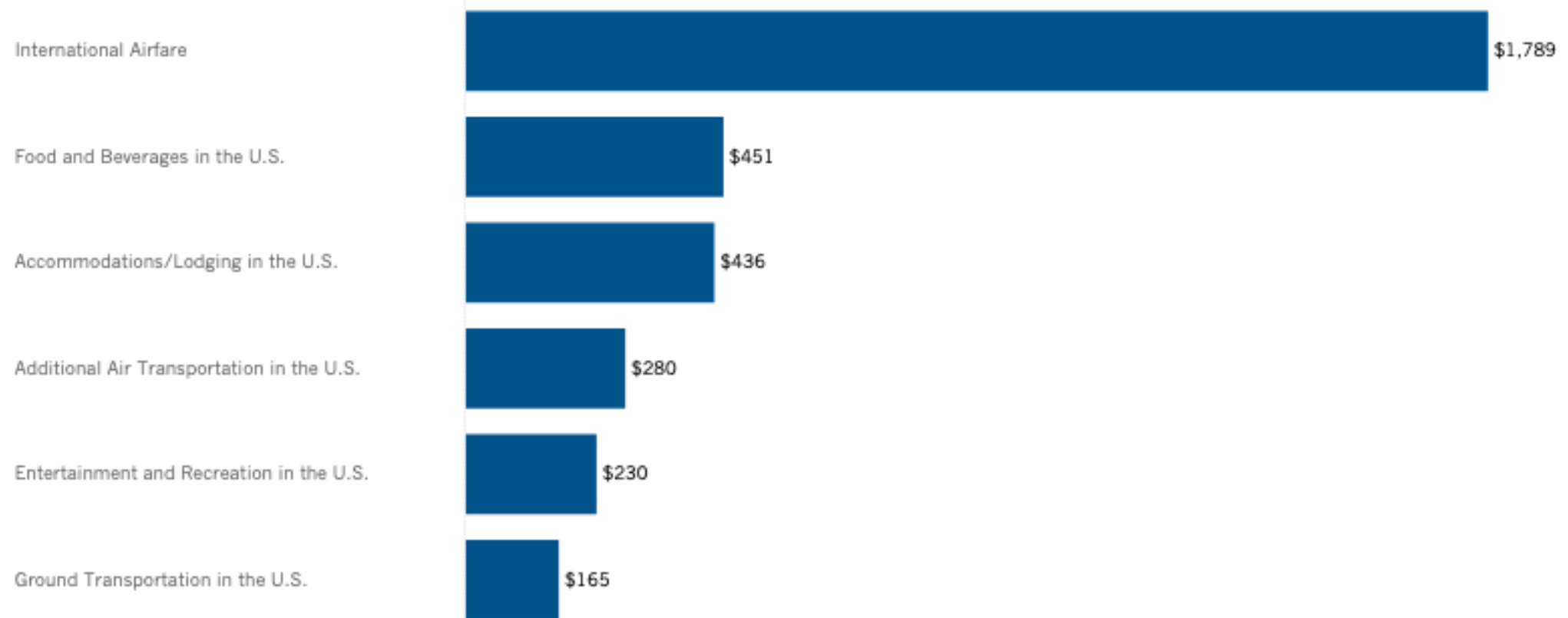


Expenditures in the US

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

South Korea

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% |



“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 |
|---------------------------|-----------|--------|-------|--------|---------|-------|-------|-------|--------|-------------|---------|-------------|----------------|---------------|
| 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% |



“CA Traveler Target”

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% |



“CA Traveler Target”

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% |