

Global Market Profile

AUSTRALIA



March 2024

Introduction

- Tourism Economics forecasts domestic leisure visitation will account for \$101B in spending in California in 2024 and international visitation will account for \$29B in spending in the state.
- In this highly competitive environment for tourism dollars and with travel demand normalizing, effective global marketing is critical to California achieving these spending numbers which requires a deep knowledge of the domestic and international markets that drive tourism spending in the state. This includes an understanding of the audience of travelers most likely to visit California in the next year.
- The **Global Market Profile** report has been developed by Visit California Research to provide the organization and the state's tourism industry with insights on California's domestic market and thirteen opportunity international markets through detailed market landscapes as well as highly targeted audience profiles and traveler behavior insights.

Market Landscape:



Audience Insights:



California Traveler & Trip Details:

- **Market Landscape** includes foundational intelligence from Visit California:
 - Visitation and Spending Forecasts
 - Airlift Recovery (flights and seats)
 - Arrival Numbers & California Market Share
 - Consumer travel intent and barriers
- **Audience Insights** includes a profile of target travelers, including:
 - Description and size of Audience Target
 - Demographic profile
 - General travel planning behavior
 - General trip spending
 - Advertising and sports preferences
- **California Traveler & Trip Details** includes details about visitors to California from the past year, including:
 - Trip purpose
 - First/Repeat visitation
 - Destinations visited
 - Travel party, accommodations, activities and expenditures

Methodology & Sources

- The report contains three sections:
 - The **Market Landscape** section is sourced from Visit California's key research partners, including Tourism Economics, NTTO, CIC Research, Cirium and YouGov.
 - The **Audience Insights** section is sourced from YouGov's Global Travel Profiles which tracks travel-related sentiment and behavior in over 25 global markets, including all thirteen Visit California opportunity markets. Panelists are surveyed on preferred trip types, booking methods, accommodation preferences, and advertising perceptions.
 - The audience profile is built on a segmentation of consumers planning international leisure travel in the next 12 months and are considering California as a destination.* The profiles provide insights into those travelers most likely to visit the state.
 - The **California Traveler and Trip Characteristic** section provides information on trips that included a stay in California from the Survey of International Air Travelers (SIAT).



Market Landscape

Country Profile

Australia



POPULATION: *

26.4M

EXCHANGE RATE: **

Local currency to USD dollar

1.5

GROSS DOMESTIC PRODUCT (GDP):

Annual % chg ***

1.6%

INFLATION RATE:

Annual % chg ****

5.3%

* www.worldometers.info, 2023

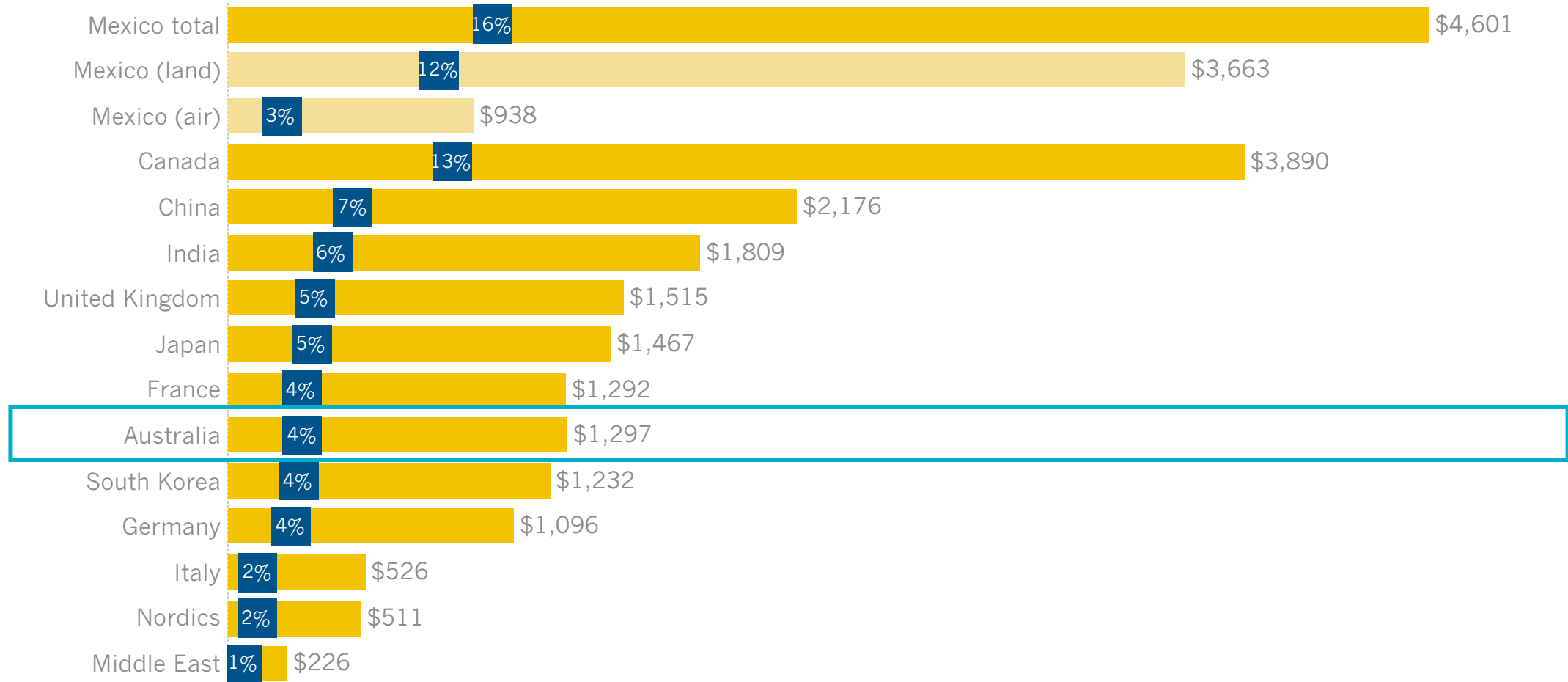
** www.x-rates.com, Feb 2024

*** www.imf.org, 2023

**** www.imf.org, 2023

Forecast: Visitor Spending by Market (2024)

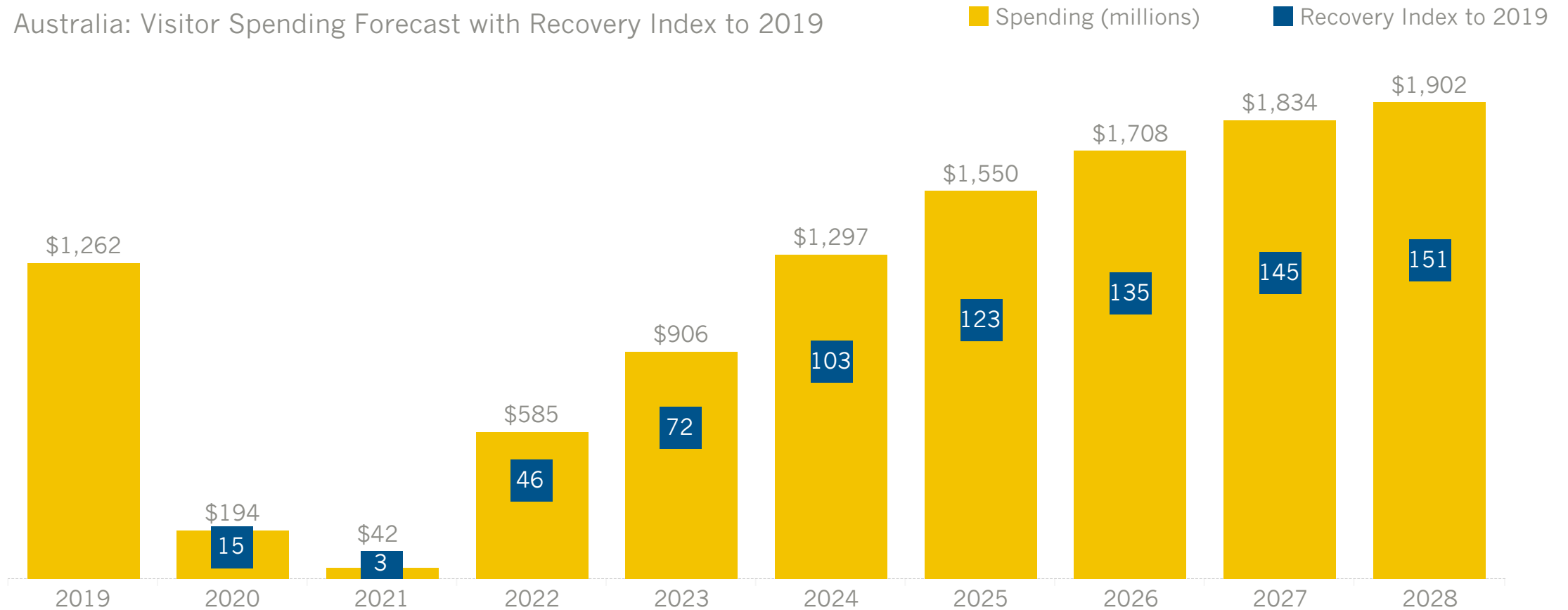
The chart below shows California's visitor spending forecast for the state's 14 target markets and share of total international spending in the state.



Forecast: Visitor Spending

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

Australia: Visitor Spending Forecast with Recovery Index to 2019



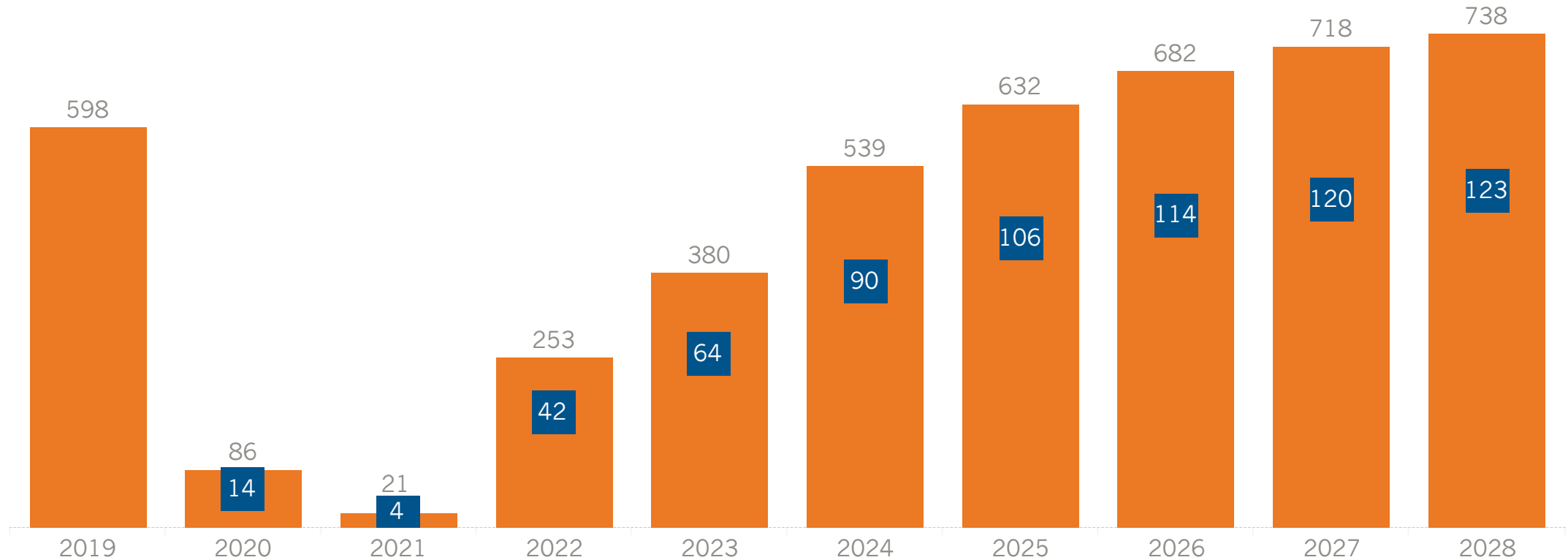
Forecast: Visitor Volume

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

Australia: Visitation Forecast with Recovery Index to 2019

■ Visitation (thousands)

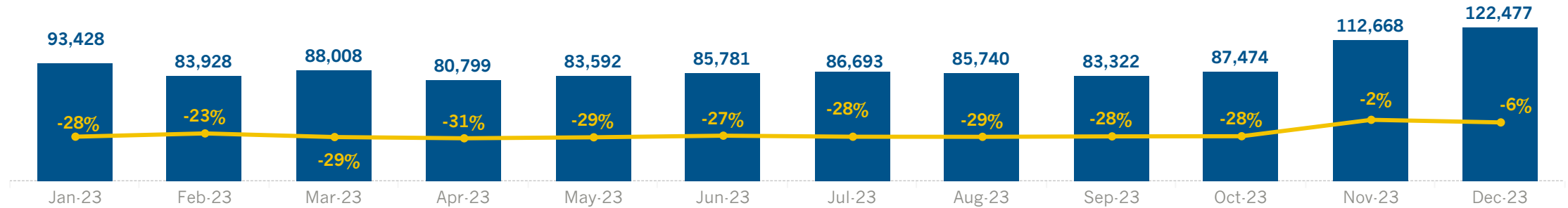
■ Recovery Index to 2019



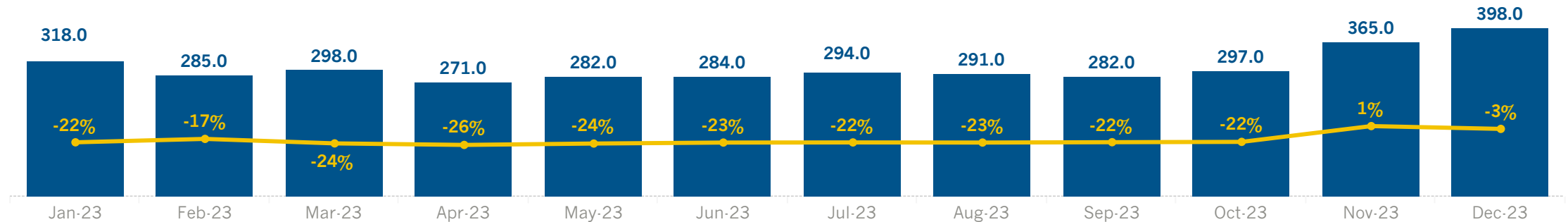
Airlift to California

The charts below shows airlift to California and percent change to 2019 for the focus market.

Australia: Non-Stop Seats to CA (% chg vs 2019)



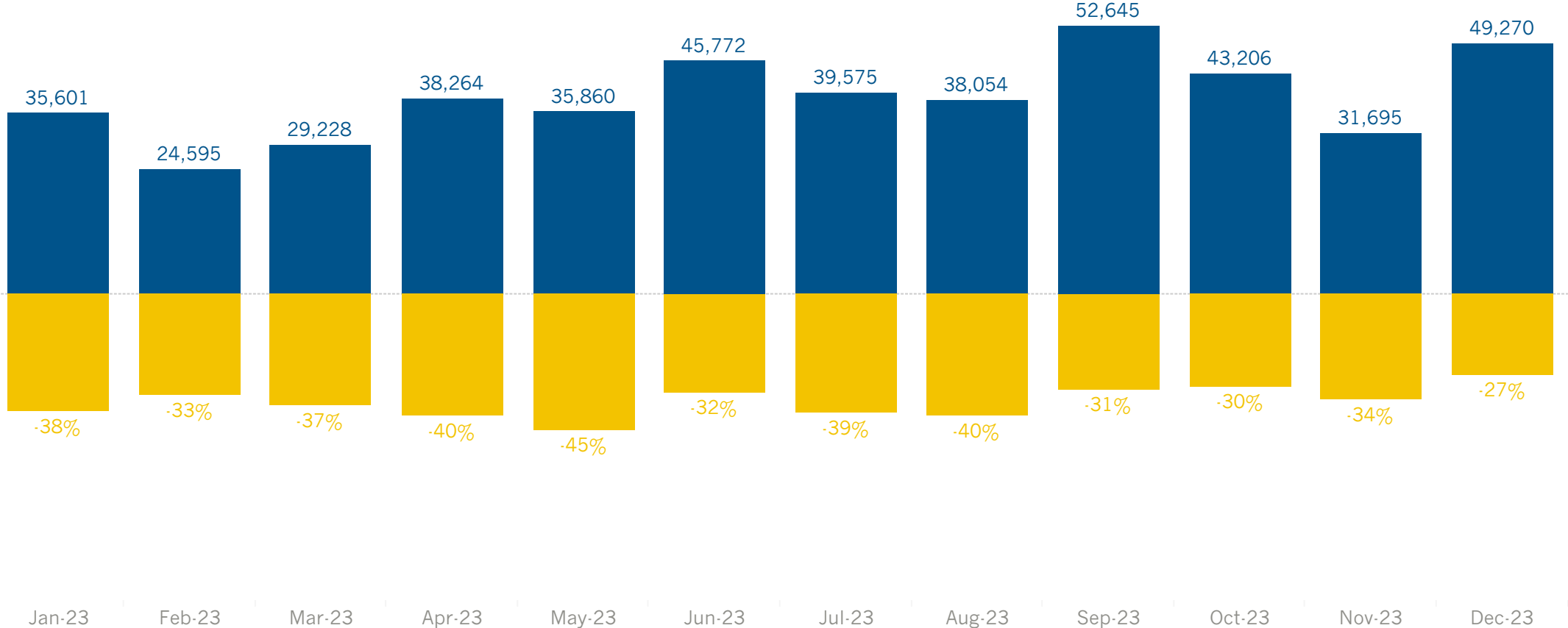
Australia: Non-Stop Flights to CA (% chg vs 2019)



Non-Resident Arrivals to California

The chart below shows non-resident arrivals at California's ports of entry and percent change to 2019 for the focus market.

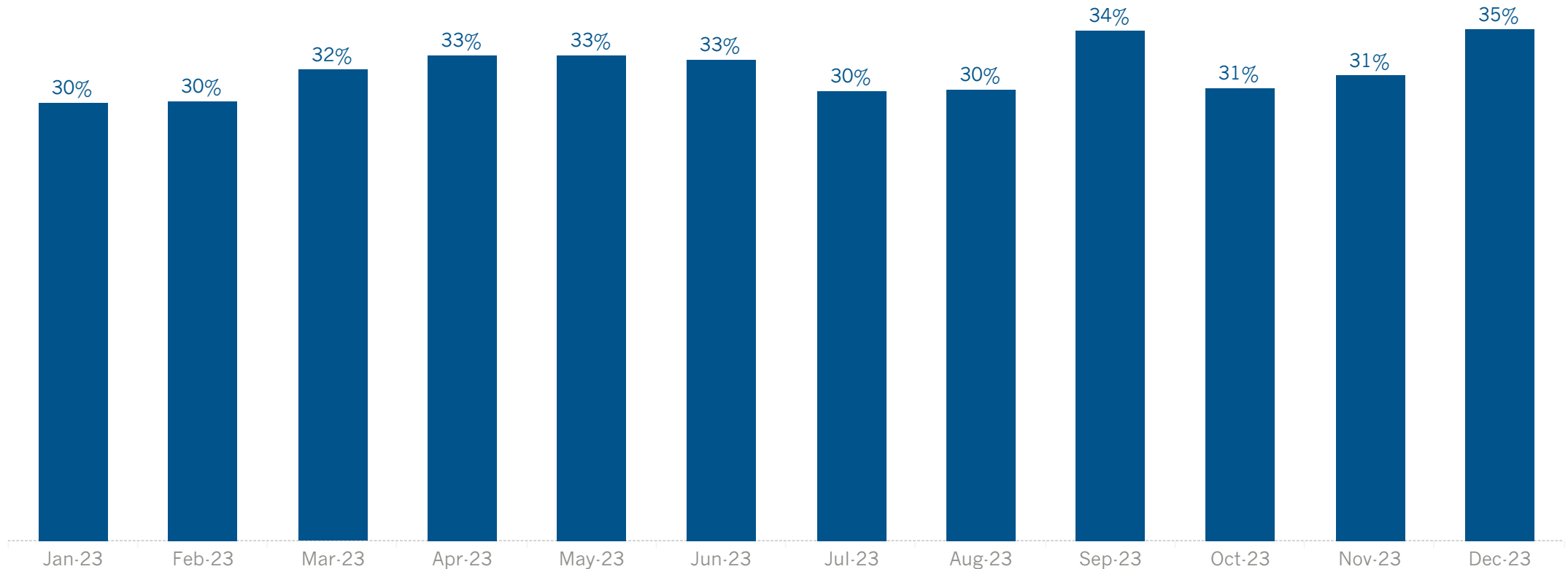
Australia: Non-Resident Arrivals at CA Ports of Entry (% change vs. 2019)



California's Share of Arrivals

The chart below shows California's share of arrivals from the focus market based on First Intended Address (FIA).

Australia: California Market Share of Arrivals Based on First Intended Address (%)



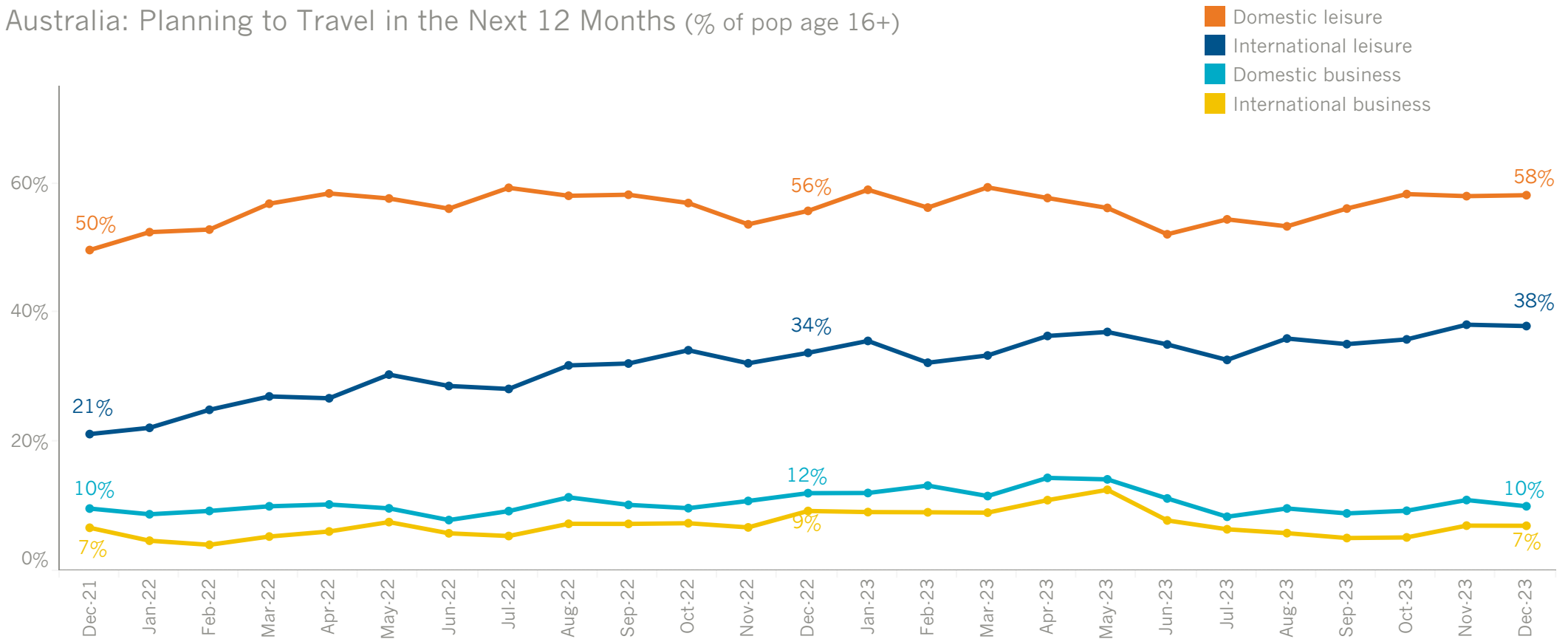
Data reported through: December 2023

Source: NTTO/CIC Research

Travel Planned in Next 12 Months

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

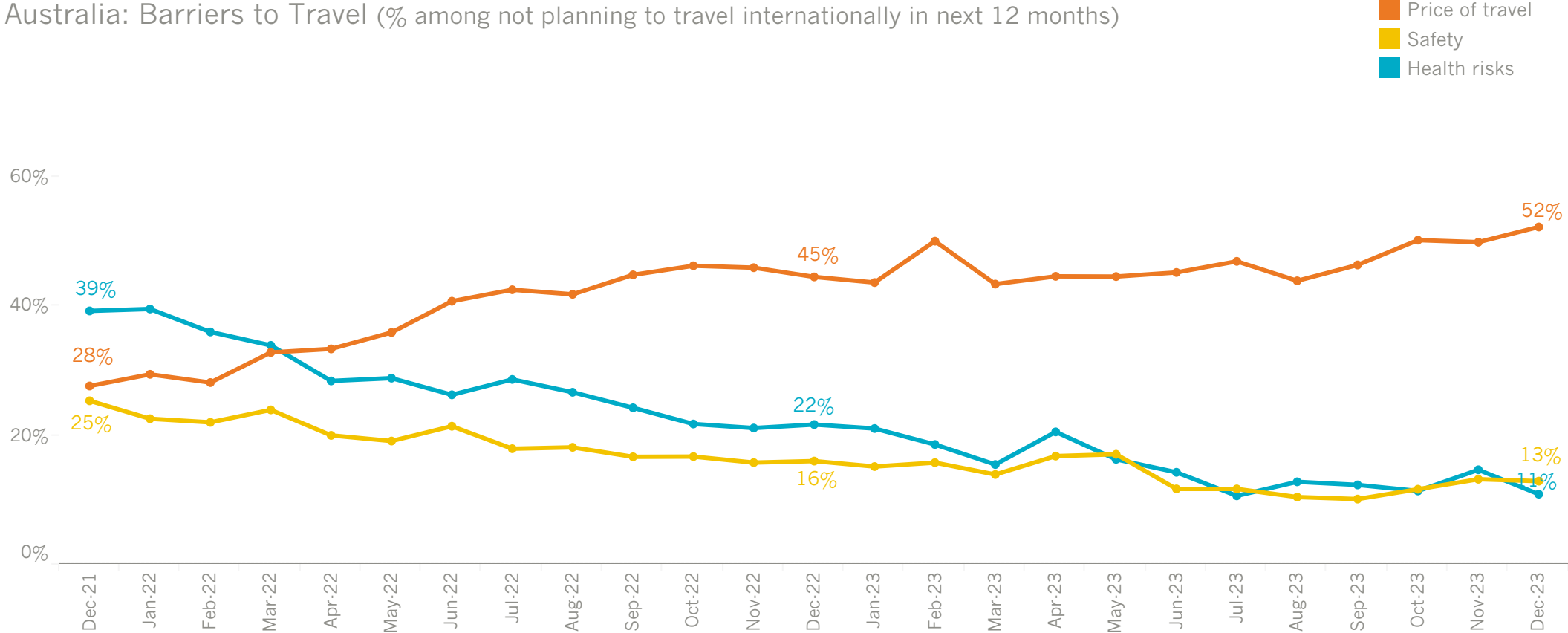
Australia: Planning to Travel in the Next 12 Months (% of pop age 16+)



Barriers to Travel

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

Australia: Barriers to Travel (% among not planning to travel internationally in next 12 months)



Q: Which, if any, of the below factors are currently preventing you from traveling?

Data reported through: December 2023

Source: YouGov



Audience Insights



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

Audience Profile

The chart shows the incidence of international leisure travelers in the focus market and the subset of international leisure travelers considering California as a destination.

The following audience profile is based on the survey responses over a 12-month period of those consumers considering California as a destination for international leisure travel.

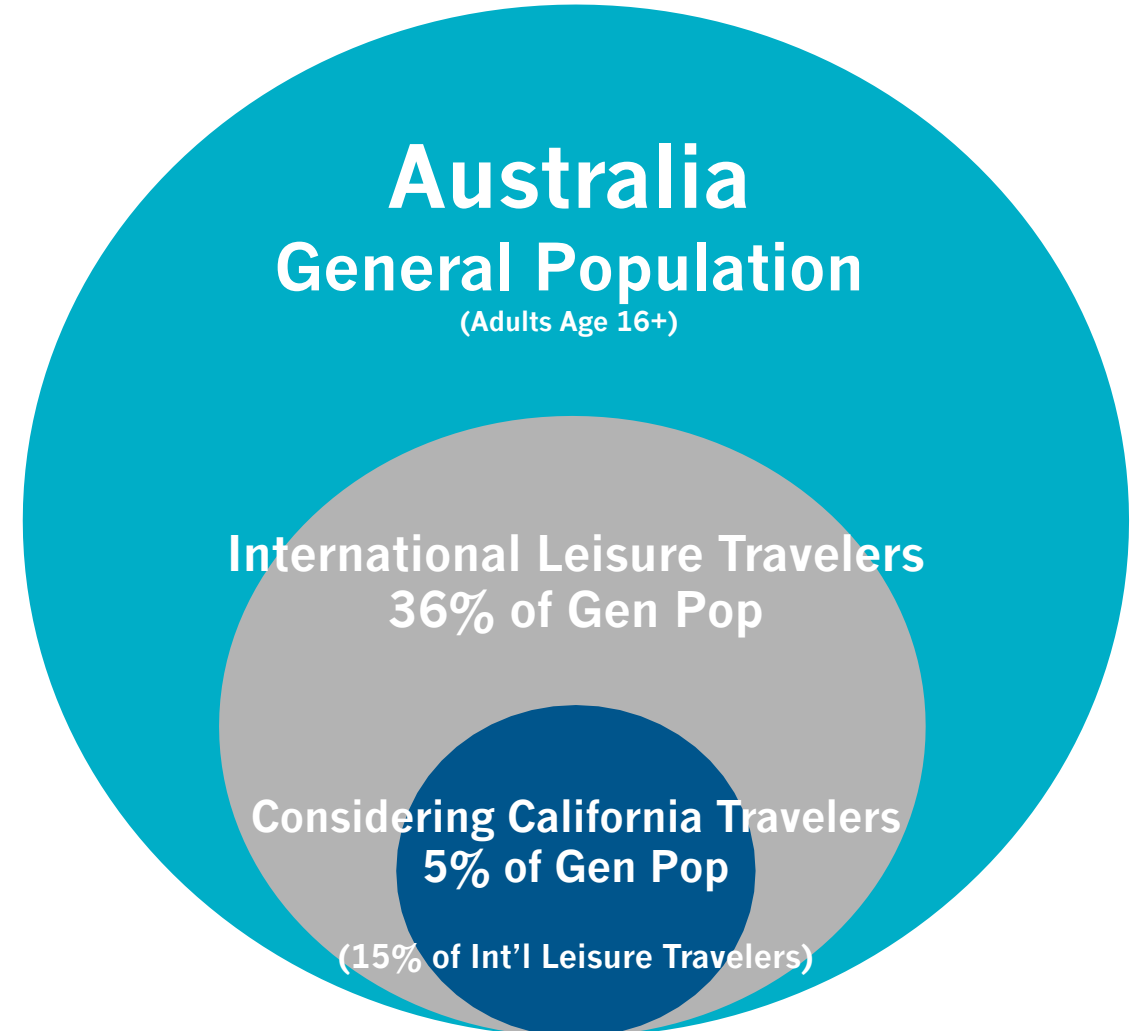
Definitions:

International Leisure Travelers:

Consumers in the focus market planning an international leisure trip in the next 12 months.

Considering California Travelers ("CA Traveler Target"):

Among the consumers in the focus market planning international leisure travel, those who are considering California as destination for travel in the next 12 months.



How to Read the Data

Generation	CA Traveler Target	Index
Gen Z	5%	59
Millennial	51%	115
Gen X	29%	124
Baby Boomer	13%	60

Generation Definitions:

- Gen Z (2000 and later)
- Millennial (1982-1999)
- Gen X (1965-1981)
- Boomer (1946-1964)

Data:

- **CA Traveler Target:** Shows the incidence (%) of the demographic characteristic or travel activity among international leisure travelers considering California as a destination in the focus market.
- **Index:** Compares the incidence (%) of the CA Traveler Target to the incidence (%) of all International Leisure Travelers. For example, an index of 115 indicates that the measure among the CA Traveler Target is 1.15x greater than among International Leisure Travelers in the focus market.



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

Demographic Profile

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

Australia

Gender

	CA Traveler Target	Index
Female	41%	87
Male	59%	111

Marital Status

	CA Traveler Target	Index
Married	56%	107
Single	22%	96

Family Status

	CA Traveler Target	Index
Children <18	42%	131

Age

	CA Traveler Target	Index
Age 16-24	9%	74
Age 25-34	27%	112
Age 35-44	26%	117
Age 45-54	20%	148
Age 55+	19%	66

Generation

	CA Traveler Target	Index
Gen Z	7%	72
Millennial	47%	109
Gen X	32%	136
Baby Boomer	13%	59

Income*

	CA Traveler Target	Index
Higher income	52%	128
Middle income	24%	83
Lower income	13%	72
Prefer not to say	10%	88

Region

	CA Traveler Target	Index
New South Wales	39%	114
Victoria	25%	98
Queensland	16%	84
Western Australia	8%	70
South Australia	7%	135
Northern Territory	2%	226
Australian Capital	2%	88
Tasmania	1%	52

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



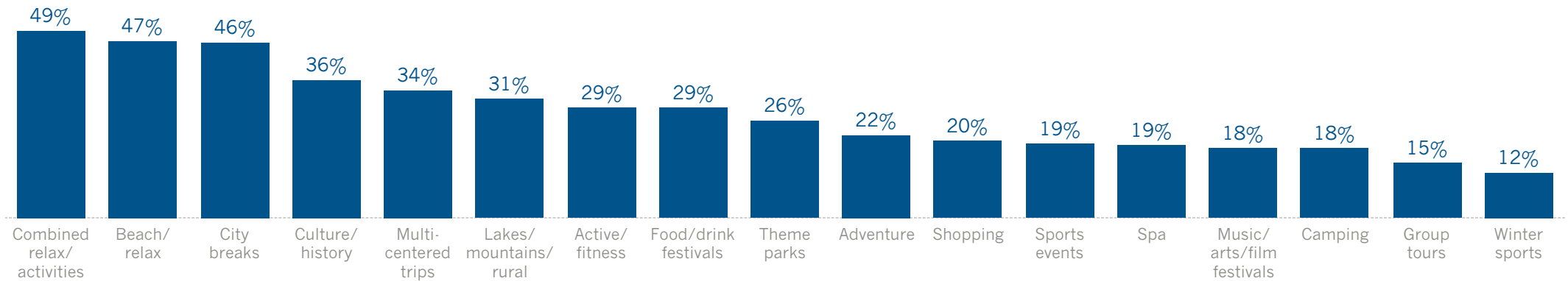
Int'l leisure travelers
considering California
"CA Traveler Target"

Trip Preferences/Characteristics

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

Australia

Trip Type



Traveler Type

	CA Traveler Target	Index
Budget	37%	99
Adventurous	17%	127
Responsible	12%	97
Luxury	11%	90
All-inclusive	9%	91

Travel Party (from most recent vacation)

	CA Traveler Target	Index
My partner	69%	114
My children	38%	118
Friend(s)	20%	92
Other family	18%	104
Solo	12%	94
Other person(s)	4%	155

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 (2023)



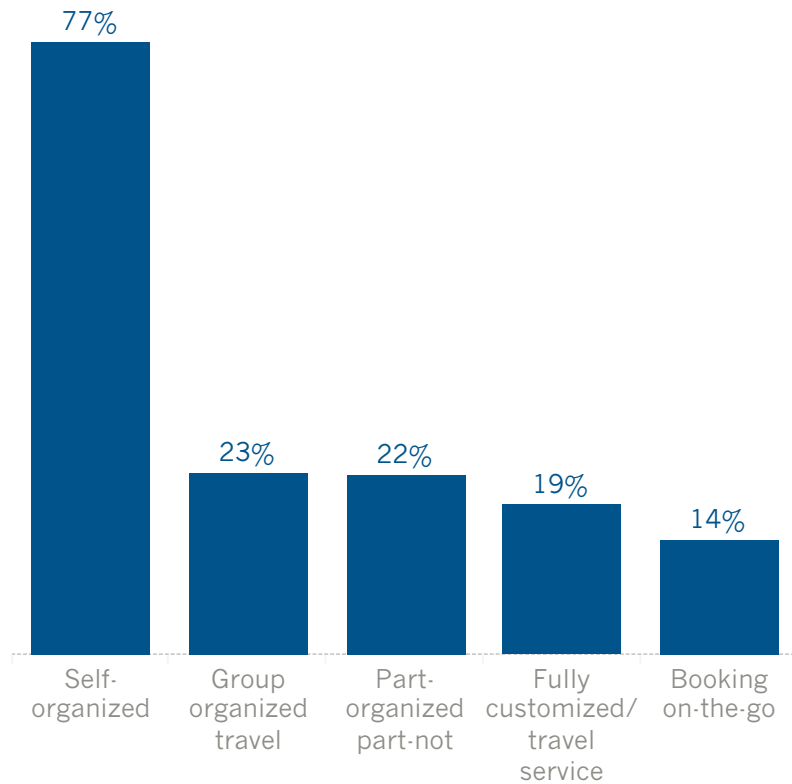
Int'l leisure travelers
considering California
"CA Traveler Target"

Organizing/Planning Methods

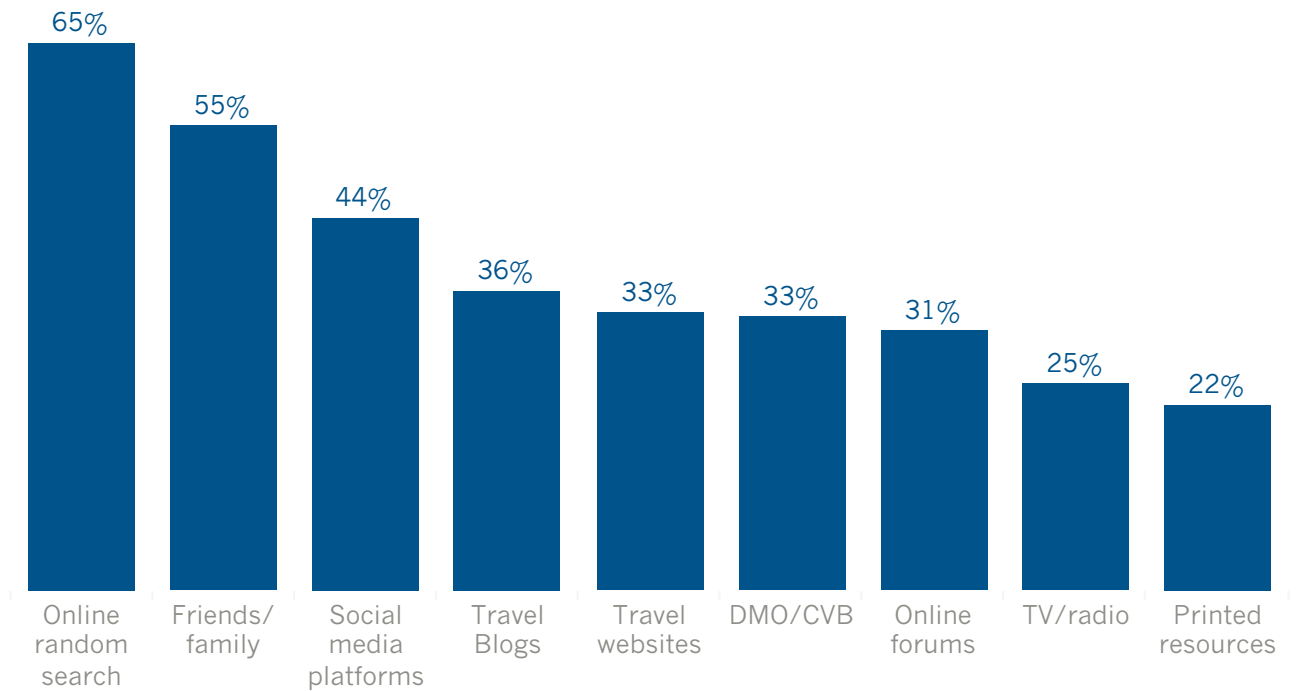
The chart below shows the organizing and planning methods of of the consumer target in the focus market.

Australia

Organizing Travel



Planning Methods



Q Organizing: Which of the following describe how you generally organize your holidays?

Q Planning: Which of the following methods do you generally use to help plan a holiday?

Source: YouGov (2023)

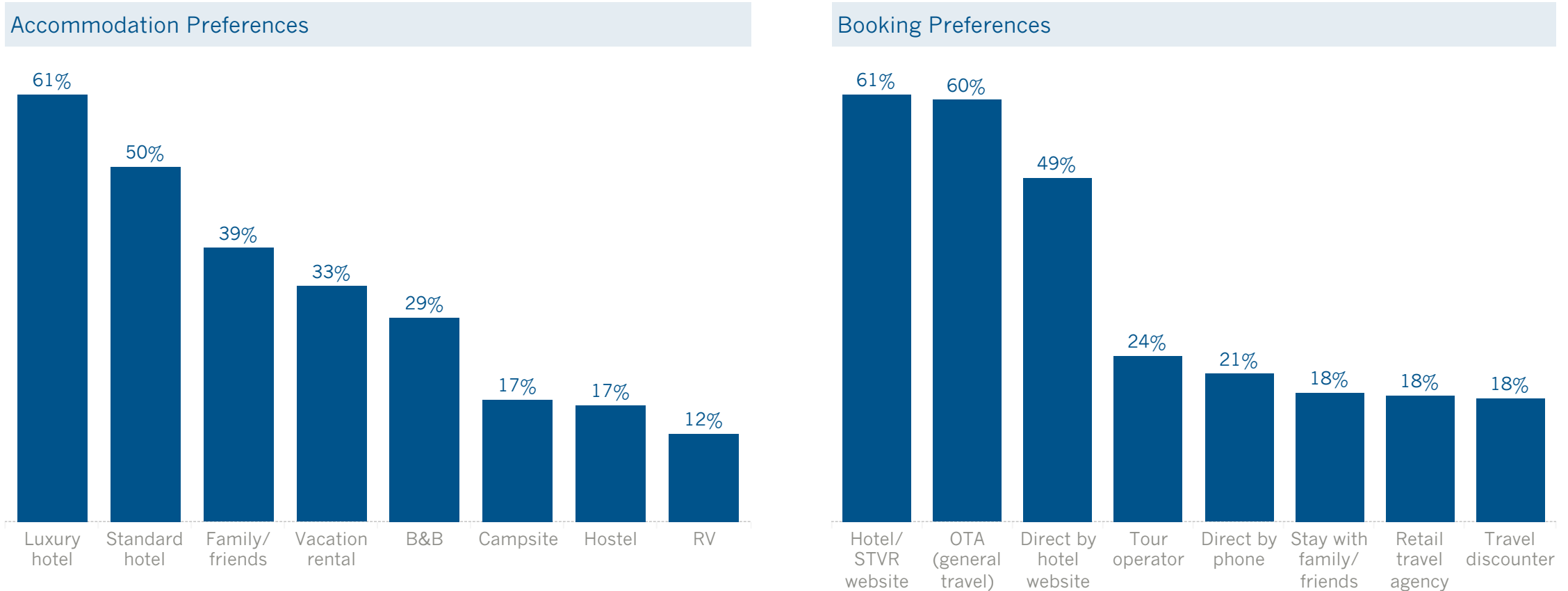


Int'l leisure travelers
considering California
"CA Traveler Target"

Booking Preferences

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

Australia



Q Accommodation: Which of the following types of accommodations do you typically stay in when you are on holiday?
Q Booking: Which of the following booking methods do you typically use when booking accommodations for the holidays?



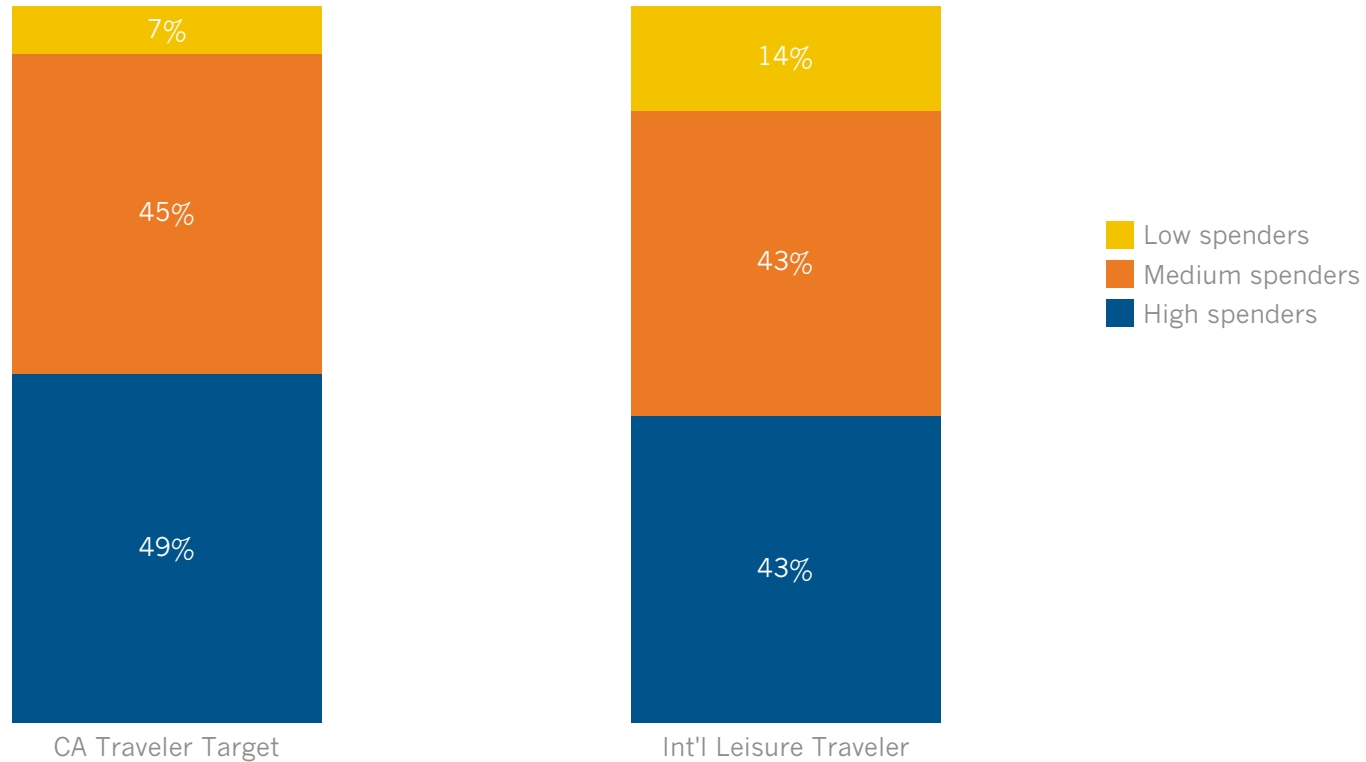
Int'l leisure travelers
considering California
"CA Traveler Target"

Travel Spending

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

Australia

Travel Spending (from most recent vacation)





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

Media & Advertising

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

Australia

Advertising Influences

	CA Traveler Target	Index
Social media	54%	128
Travel websites	49%	130
Online streaming services	41%	151
TV - Free to view channels	36%	123
Billboards	36%	147
Cinema	36%	145
Magazines (digital)	32%	163
Direct mail	28%	127
TV - paid/subscription	25%	177
National newspaper (digital)	25%	157
Podcast	25%	186
Local newspaper (digital)	23%	136
Radio	23%	145
Public transport	21%	138
Local newspaper (physical)	20%	123
Magazines (physical)	20%	128
National newspaper (physical)	17%	132

Sports Watched/Followed

	CA Traveler Target	Index
Australian Rules Football	38%	130
Tennis	38%	127
Soccer/Football	36%	149
Swimming	27%	122
Rugby League	26%	137
Basketball	24%	159
Cricket	24%	106
NFL	20%	204
Cycling	19%	171
Boxing	17%	177
Baseball	15%	209
Horse Racing	15%	174
Running/Marathon	15%	154
Surfing	14%	167
Athletics/Track & Field	14%	171
Gymnastics	14%	147
Golf	13%	134
Volleyball	11%	169
Ice Hockey	9%	165

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 (2023)



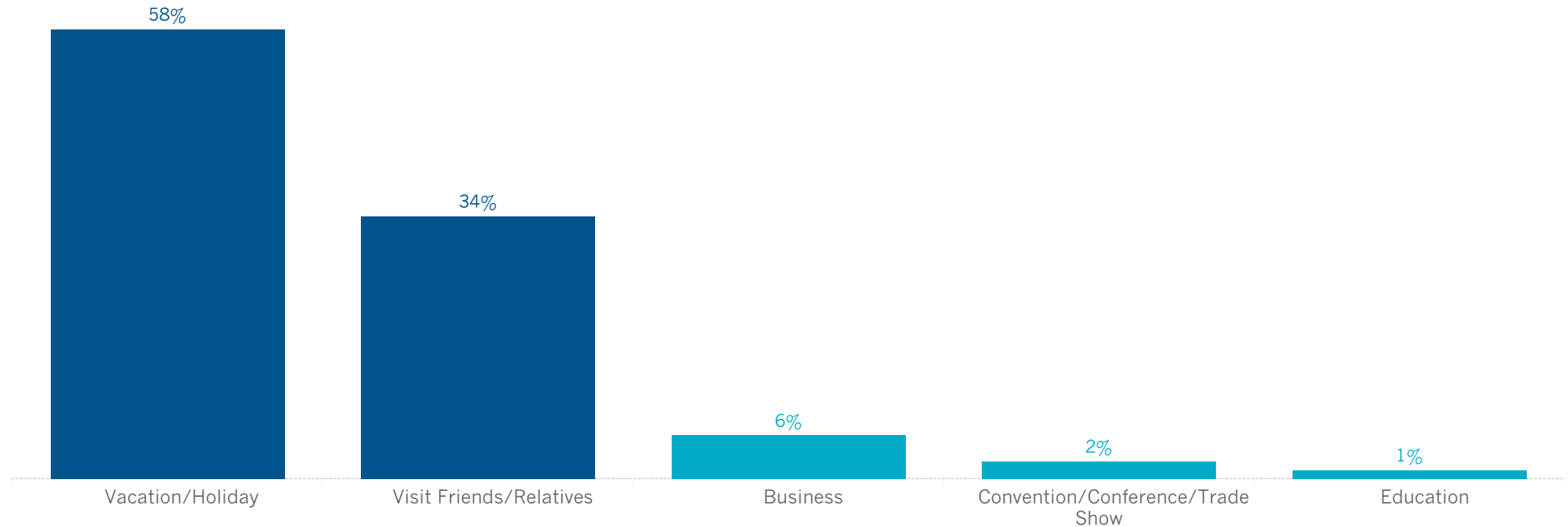
California Travelers & California Trip Characteristics

Main Purpose of Trip

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

Australia

Main Purpose of Trip

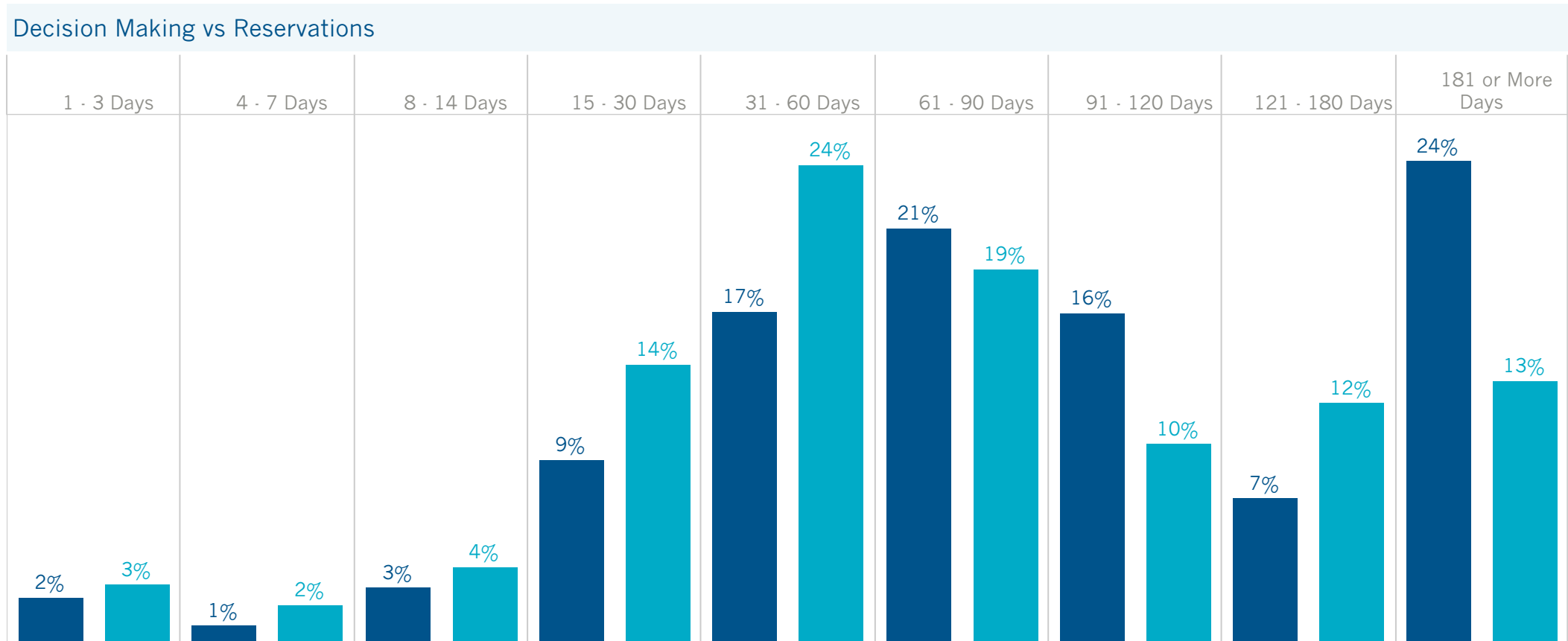




Decision Making vs Reservations

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

Australia



- How many days prior to departure did you make the decision to travel?
- How many days prior to departure did you make air travel reservations?

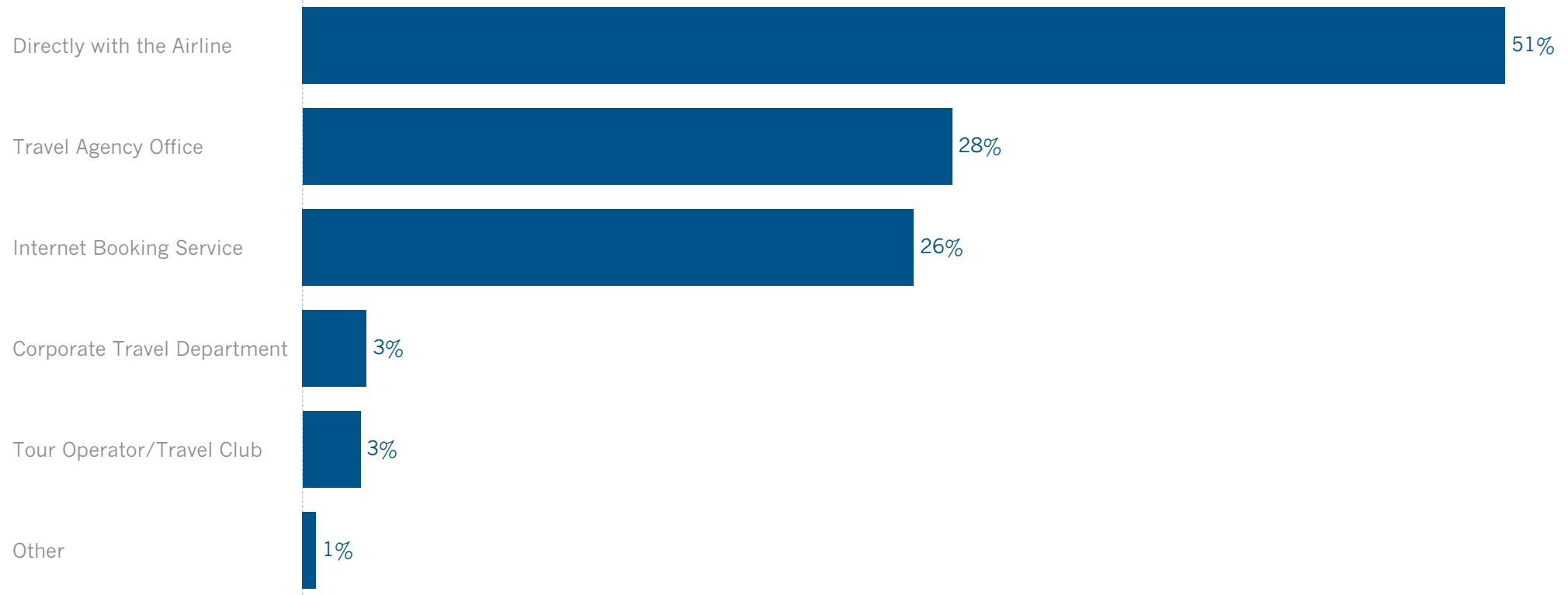


Airline Reservations

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

Australia

Airline Reservations



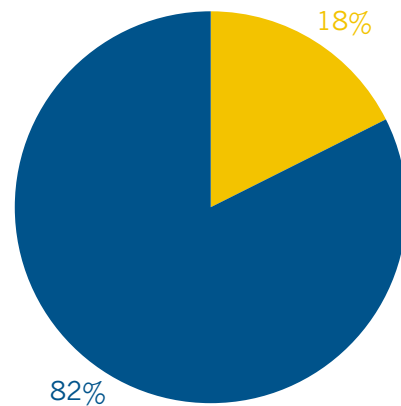


First/Repeat Visitation, Travel Party Size

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

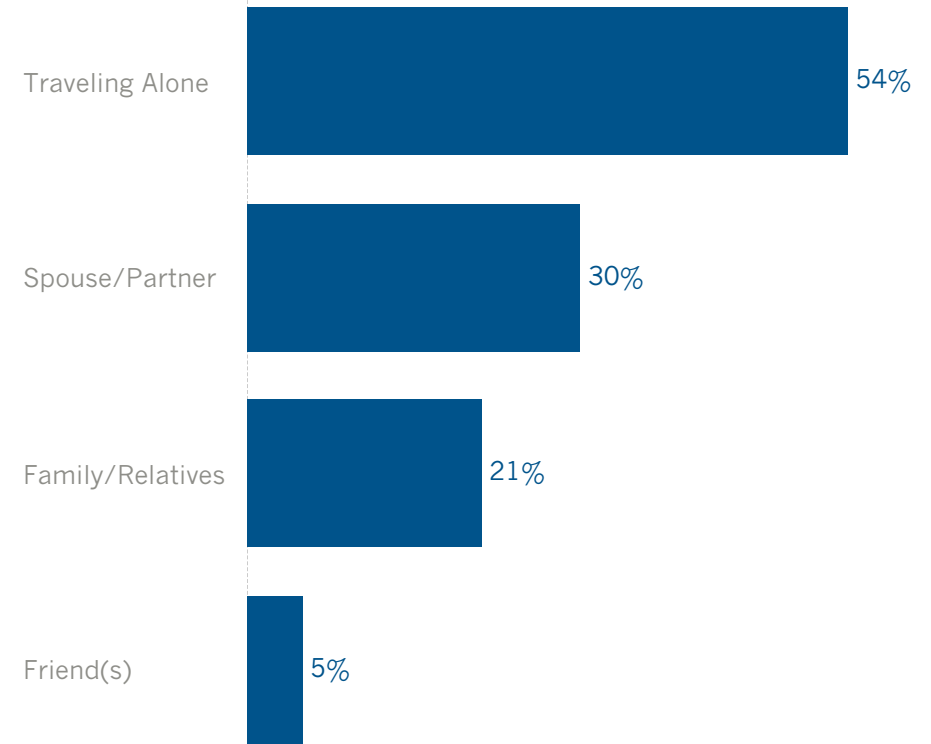
Australia

First trip to the US



Yes
No

Travel Companion



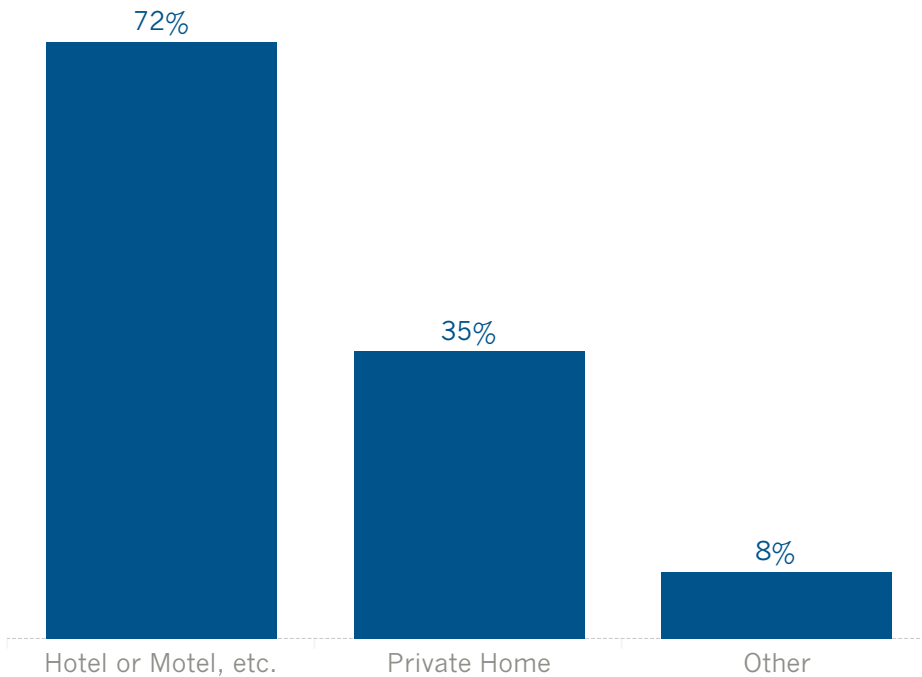


Types of Accommodations & Nights

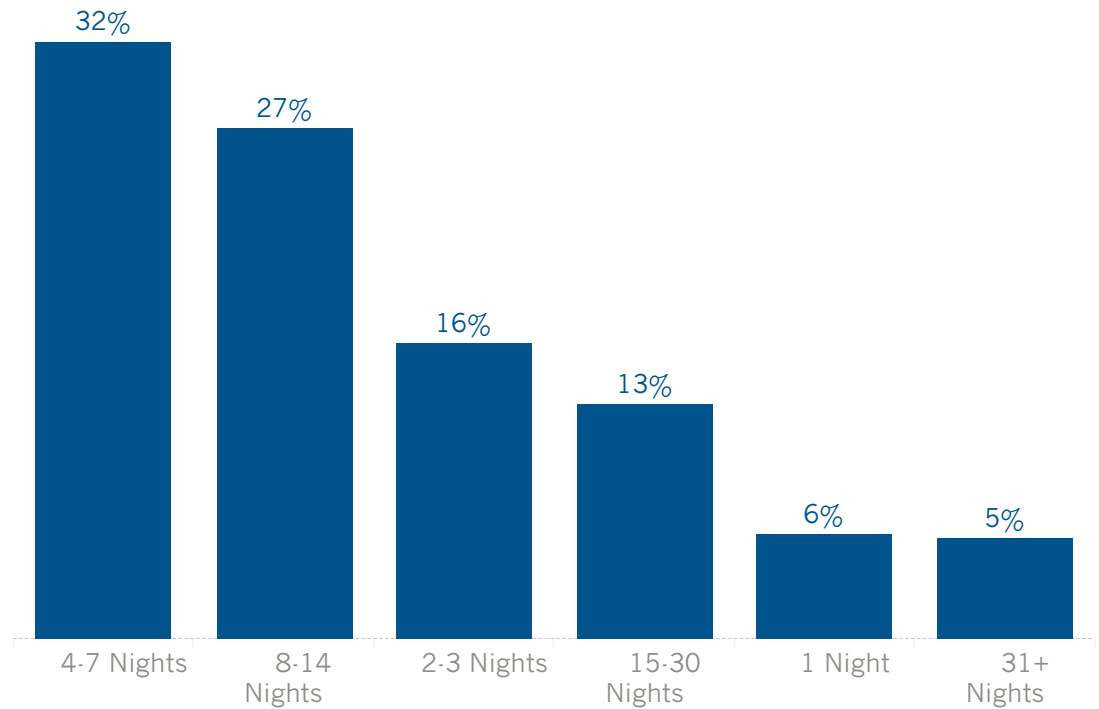
The charts below show types of accommodations stayed in and number of nights in destination among travelers from the focus market.

Australia

Types of Accommodations



Nights in Destination



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

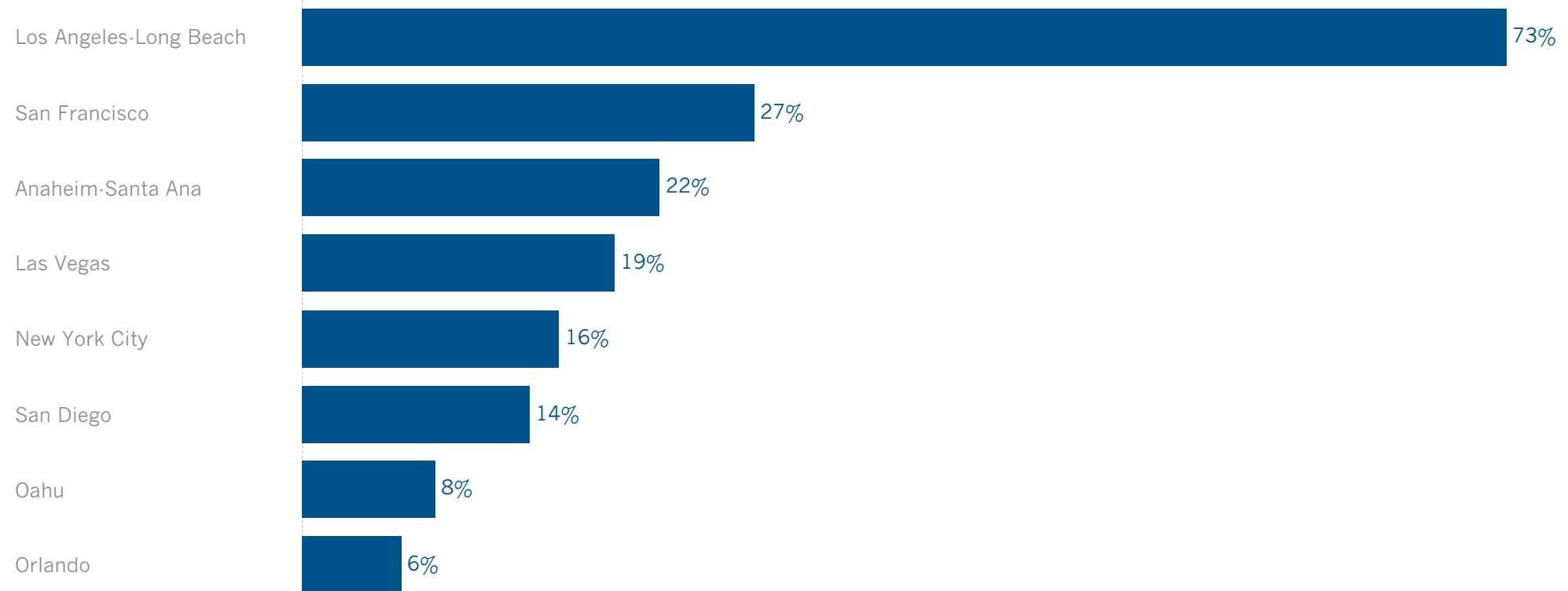


Destinations Visited

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

Australia

US Destinations visited



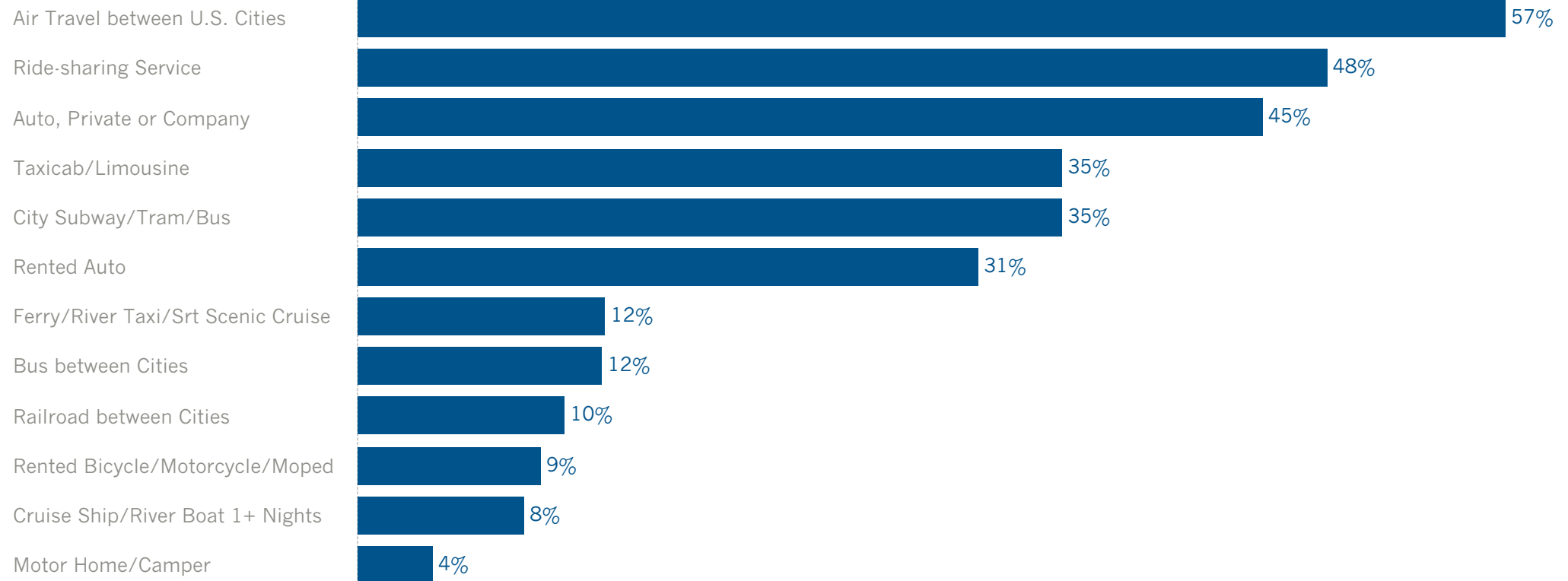


Transportation

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

Australia

Types of Transportation



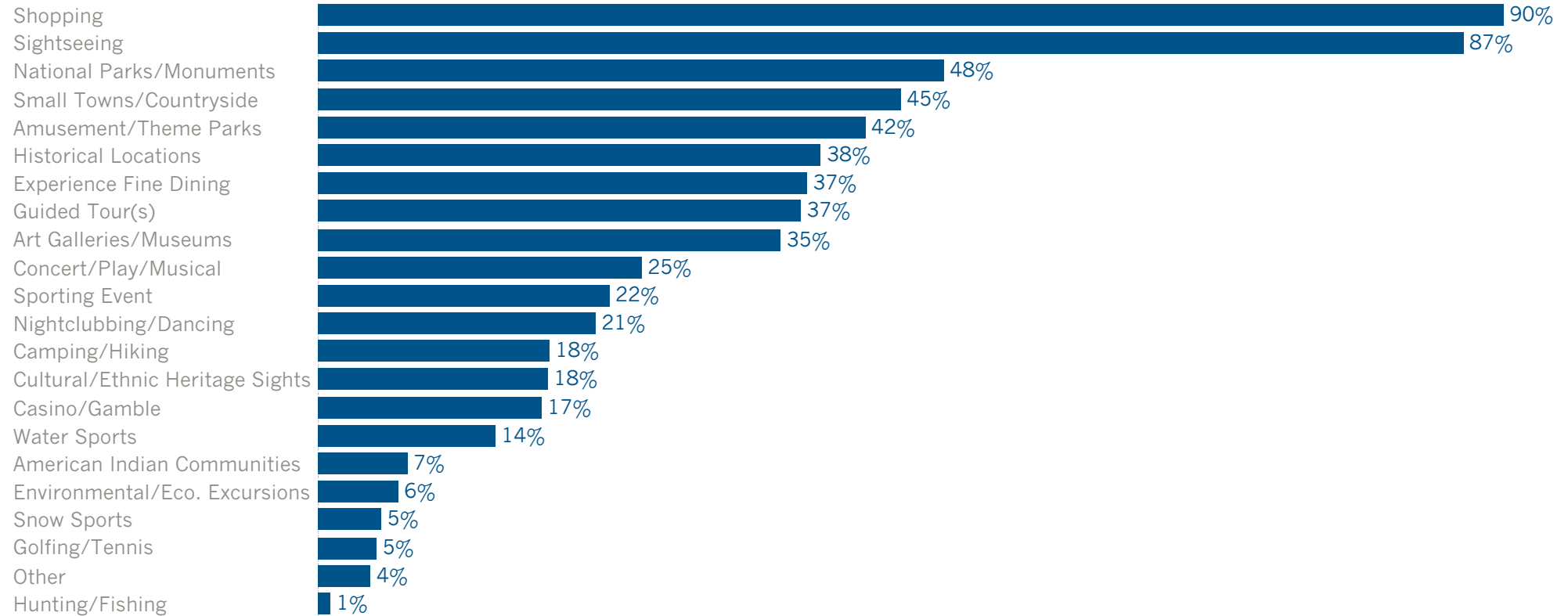


Activities

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

Australia

Leisure Activities





Expenditures in the US

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

Australia

Expenditures per visitor

