

Global Market Profile

UNITED STATES



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)
 - 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 timing
 - Accommodations
 - Transportation
 - Activities
 - Regions visited

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 for the domestic report provides information on trips to California from Visit California's proprietary U.S. ROAS Study conducted by SMARInsights.



Market Landscape

Country Profile

United States



POPULATION: *

341.2M

GROSS DOMESTIC PRODUCT (GDP):

Annual % chg ***

1.5%

INFLATION RATE:

Annual % chg ****

2.8%

* www.worldometers.info, 2023

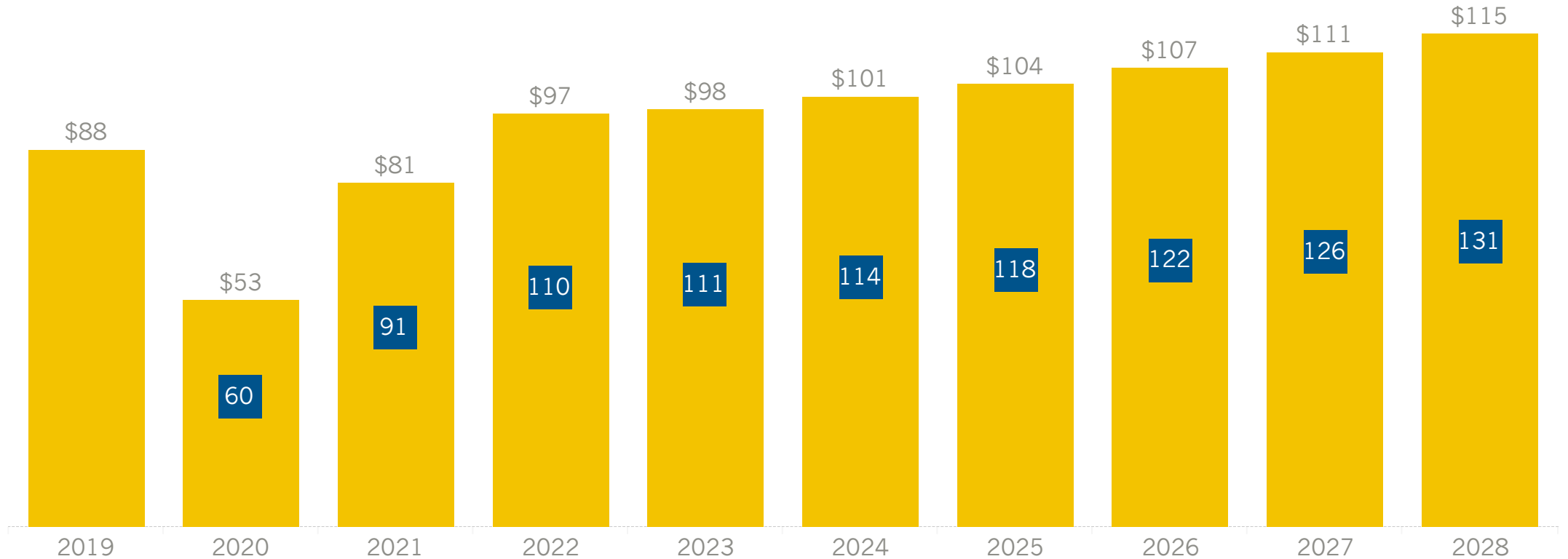
*** www.imf.org, 2023

**** www.imf.org, 2023

Forecast: Visitor Spending

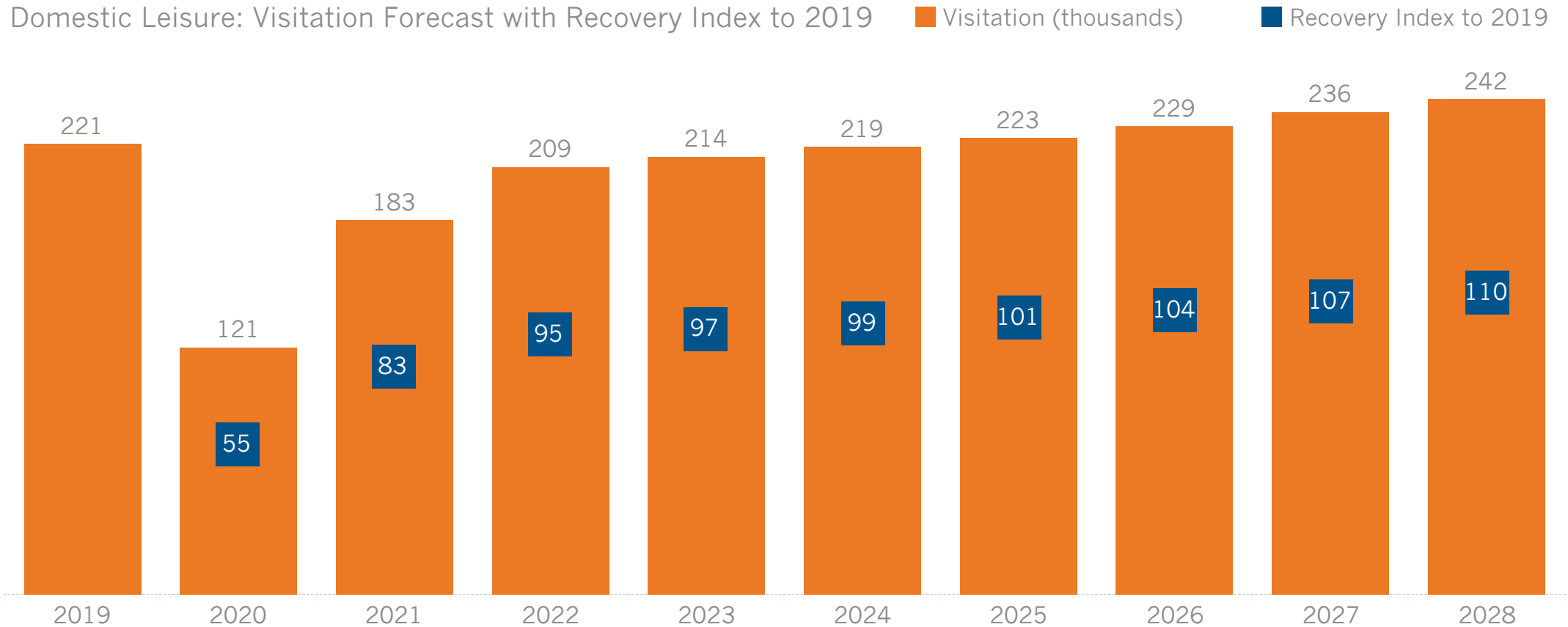
The chart below shows the state's visitor spending forecast and the recovery index for the focus market.

Domestic Leisure: Visitor Spending Forecast with Recovery Index to 2019 ■ Spending (millions) ■ Recovery Index to 2019



Forecast: Visitor Volume

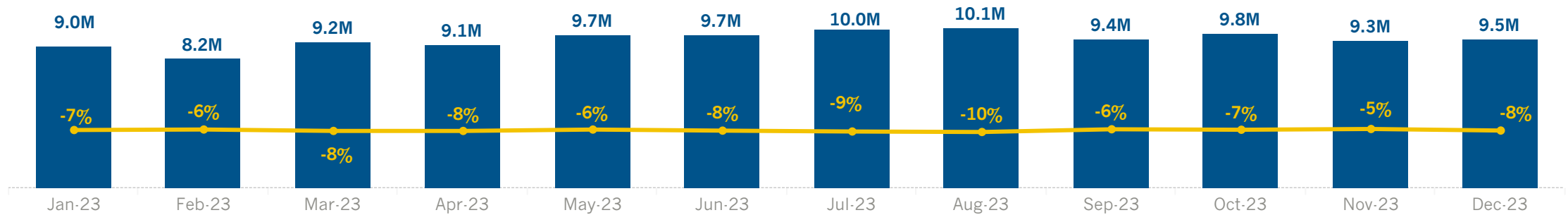
The chart below shows the state's visitation forecast and recovery index for the focus market.



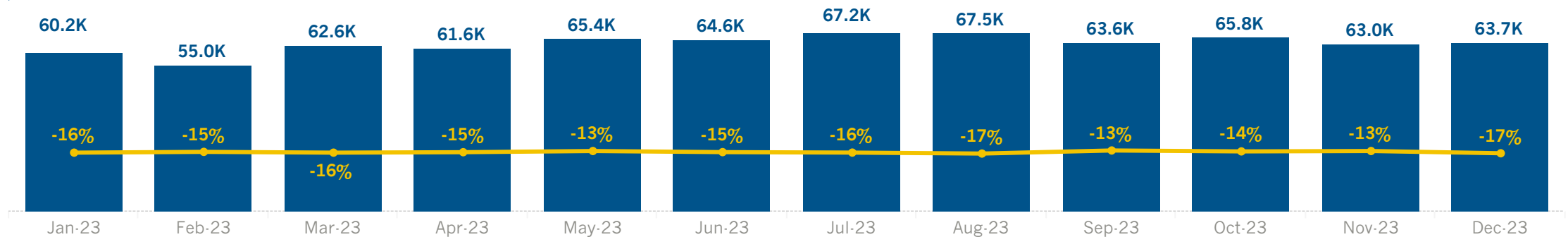
Airlift to California

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

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



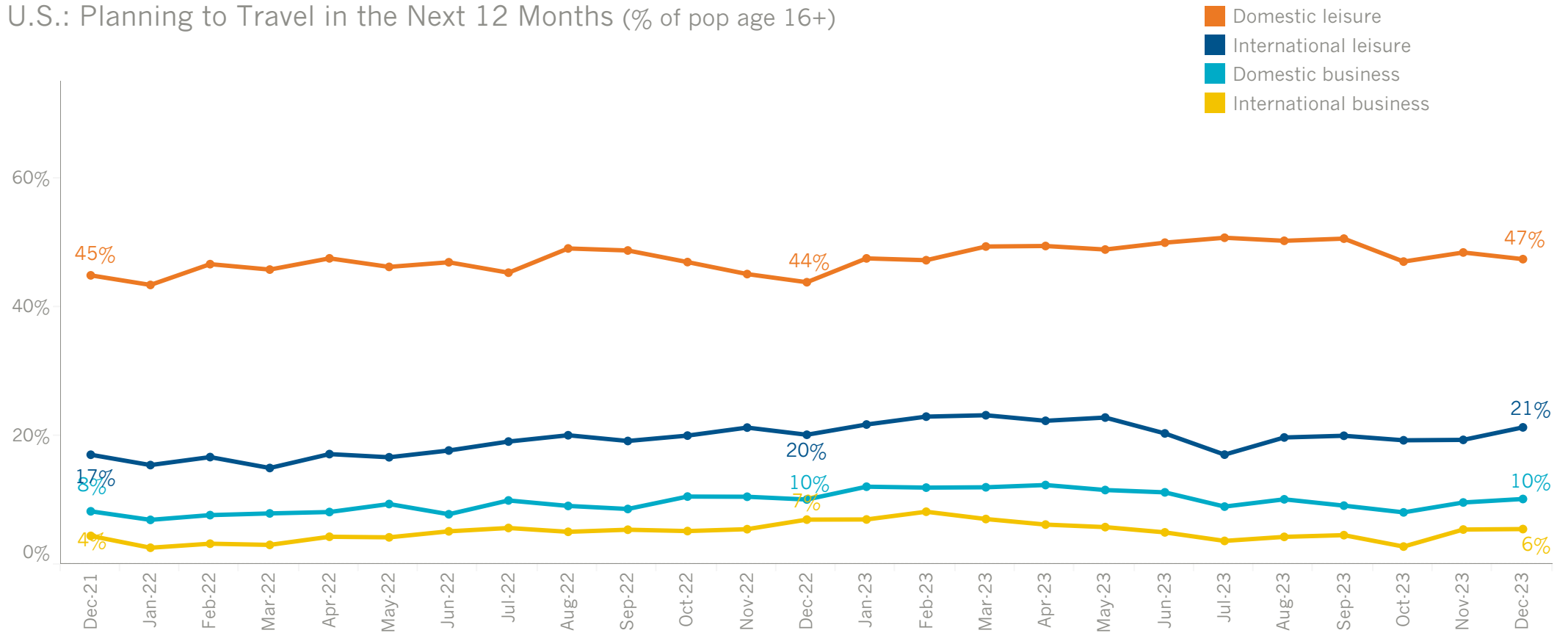
Domestic: Non-Stop Flights to CA (% chg vs 2019)



Travel Planned in Next 12 Months

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

U.S.: 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?

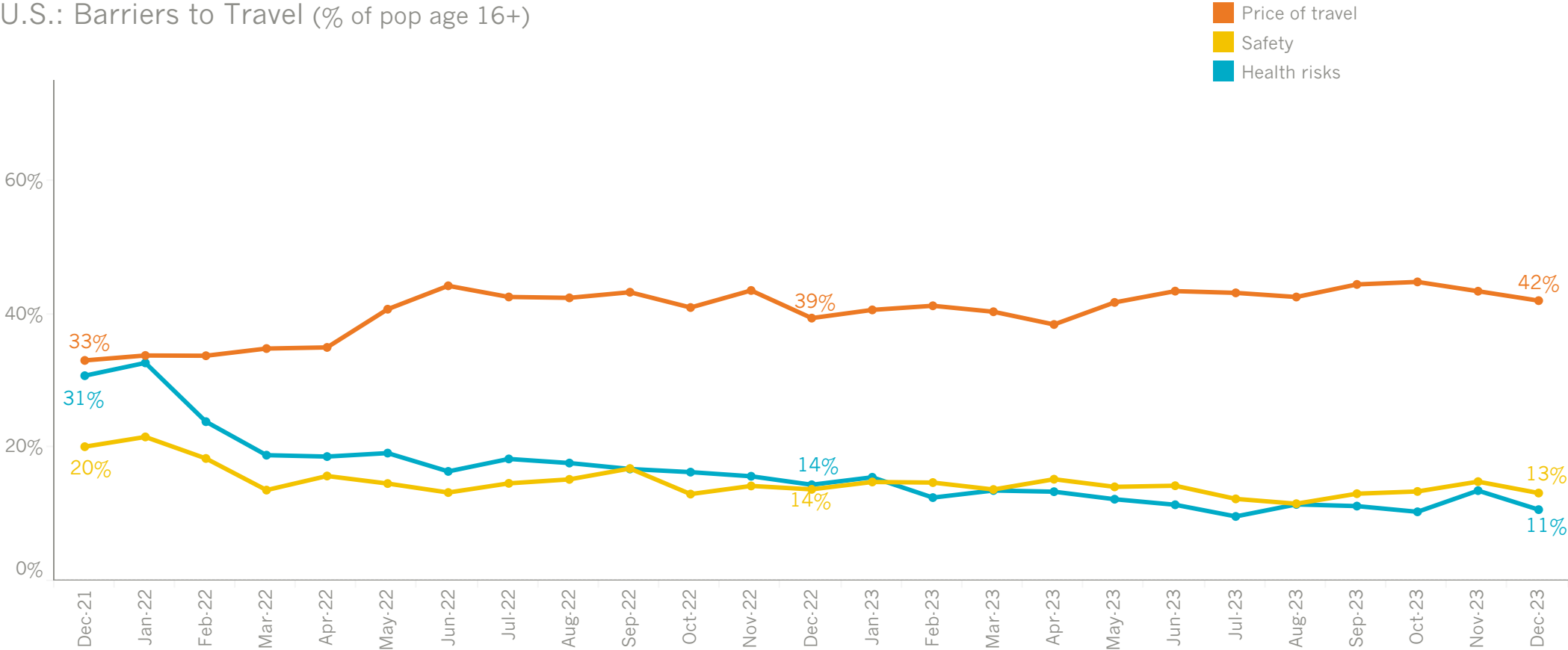
Data reported through: December 2023

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.

U.S.: Barriers to Travel (% of pop age 16+)



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

Data reported through: December 2023

Source: YouGov



Audience Insights



Domestic 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.

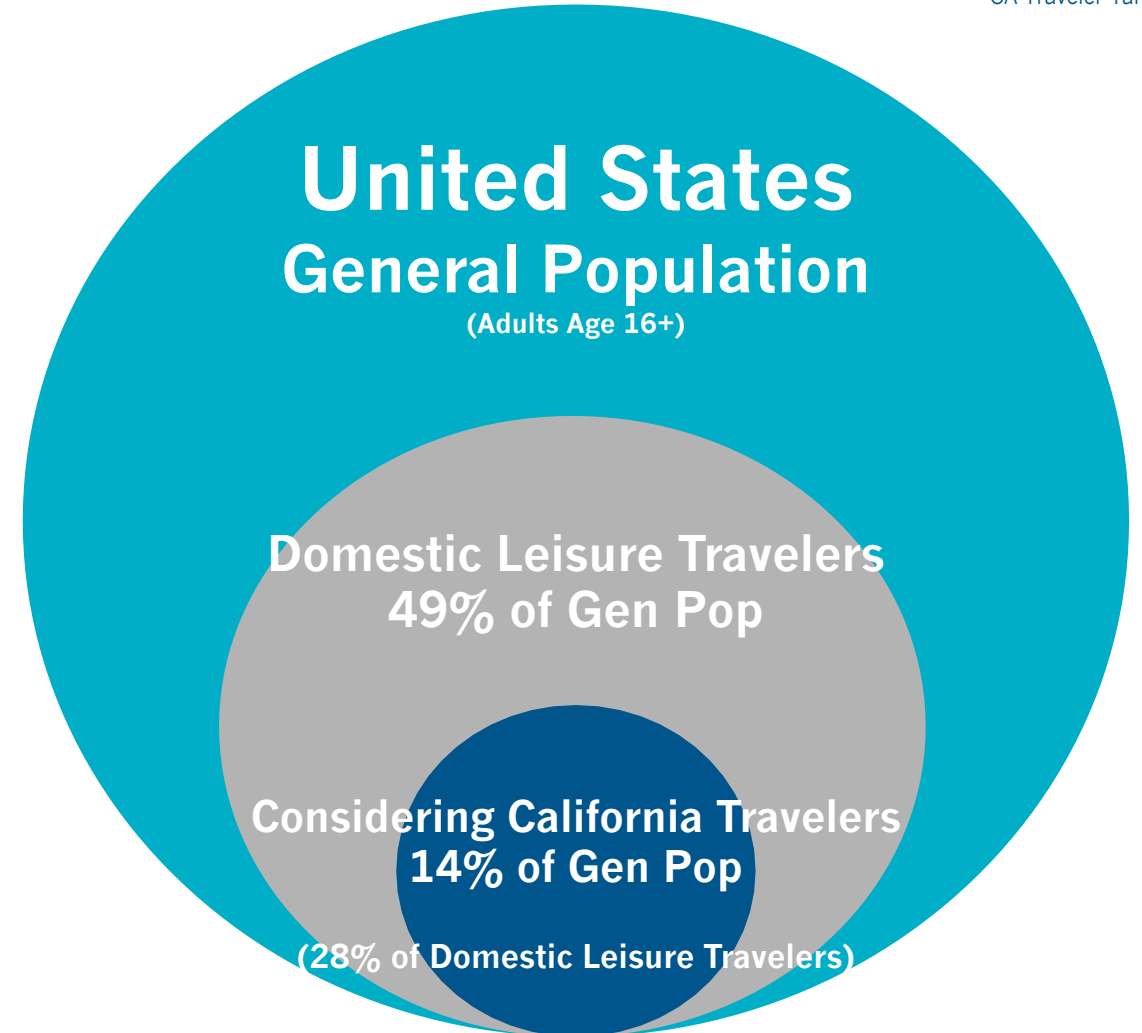
Definitions:

Domestic Leisure Travelers:

Consumers in the U.S. planning a domestic leisure trip in the next 12 months.

Considering California Travelers (“CA Traveler Target”):

Among the consumers planning domestic 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.

United States

Gender		
	CA Traveler Target	Index
Female	50%	102
Male	50%	98

Marital Status		
	CA Traveler Target	Index
Married	51%	94

Family Status		
	CA Traveler Target	Index
Children <18	18%	107

Age		
	CA Traveler Target	Index
Age 16-24	8%	97
Age 25-34	22%	113
Age 35-44	21%	119
Age 45-54	13%	102
Age 55+	36%	86

Generation		
	CA Traveler Target	Index
Gen Z	6%	99
Millennial	38%	113
Gen X	26%	105
Baby Boomer	28%	86

Income*		
	CA Traveler Target	Index
Higher income	14%	111
Middle income	49%	102
Lower income	30%	98
Prefer not to say	8%	84

Region		
	CA Traveler Target	Index
South	32%	85
West	30%	127
Midwest	21%	102
Northeast	17%	95

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

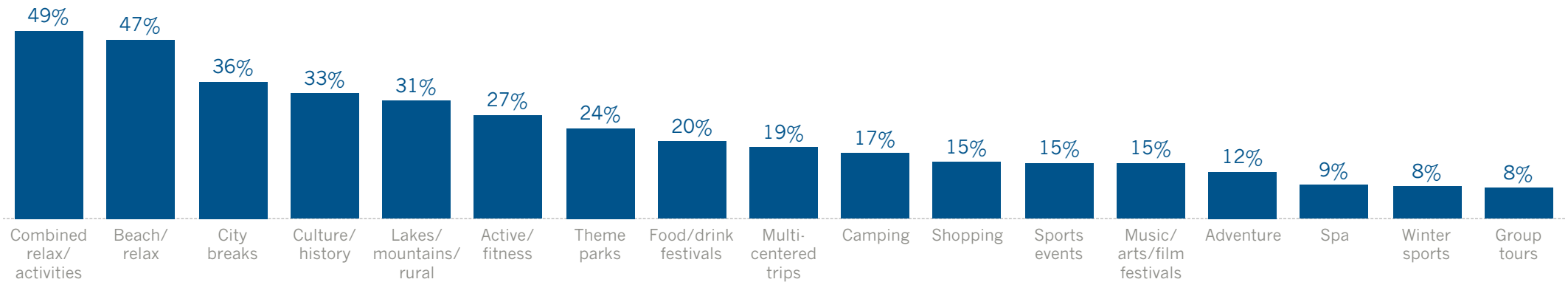


Trip Preferences/Characteristics

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

United States

Trip Type



Traveler Type

	CA Traveler Target	Index
Budget	41%	100
Responsible	12%	108
Adventurous	11%	97
Luxury	9%	106
All-inclusive	6%	97

Travel Party (from most recent vacation)

	CA Traveler Target	Index
My partner	58%	99
My children	33%	101
Other family	23%	104
Friend(s)	22%	105
Solo	11%	112
Other person(s)	4%	100

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?

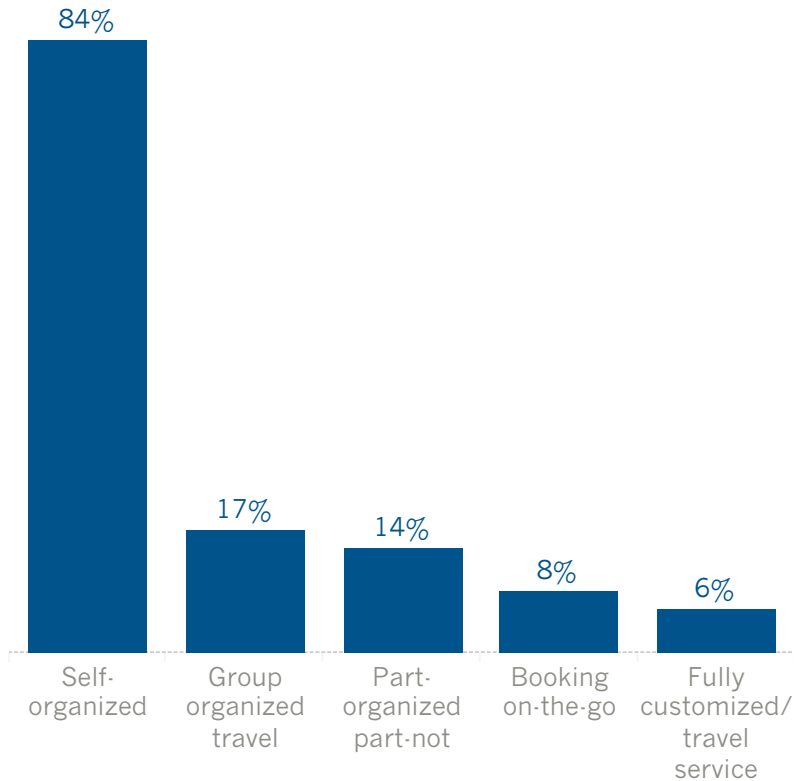


Organizing/Planning Methods

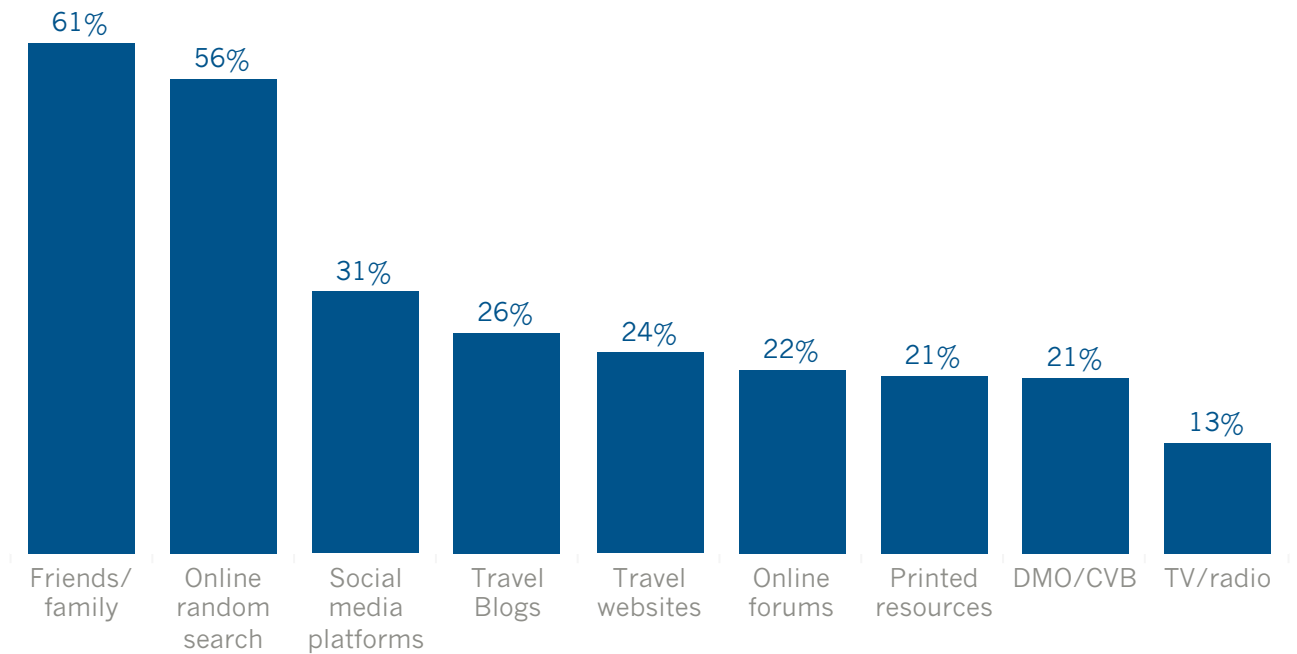
The chart below shows the organizing and planning methods of of the consumer target in the focus market.

United States

Organizing Travel



Planning Methods



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

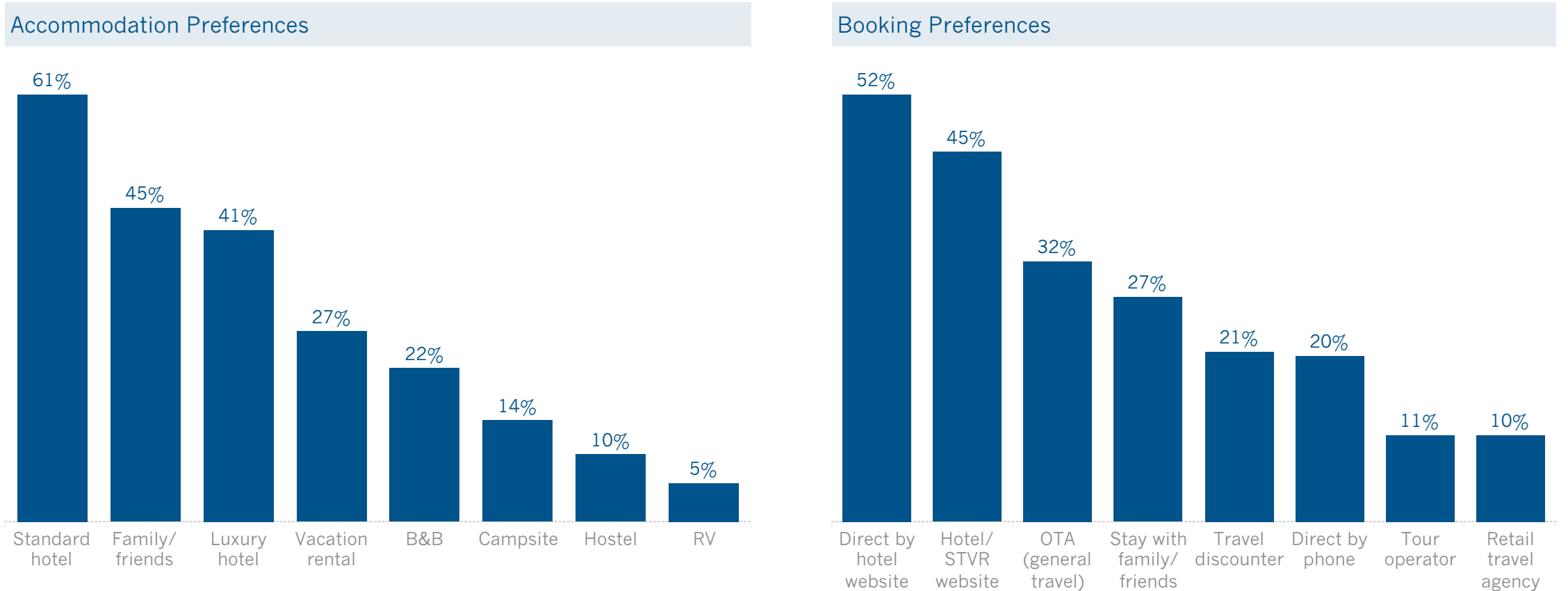
Q Planning: Which of the following methods do you generally use to help plan a holiday?



Booking Preferences

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

United States



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?

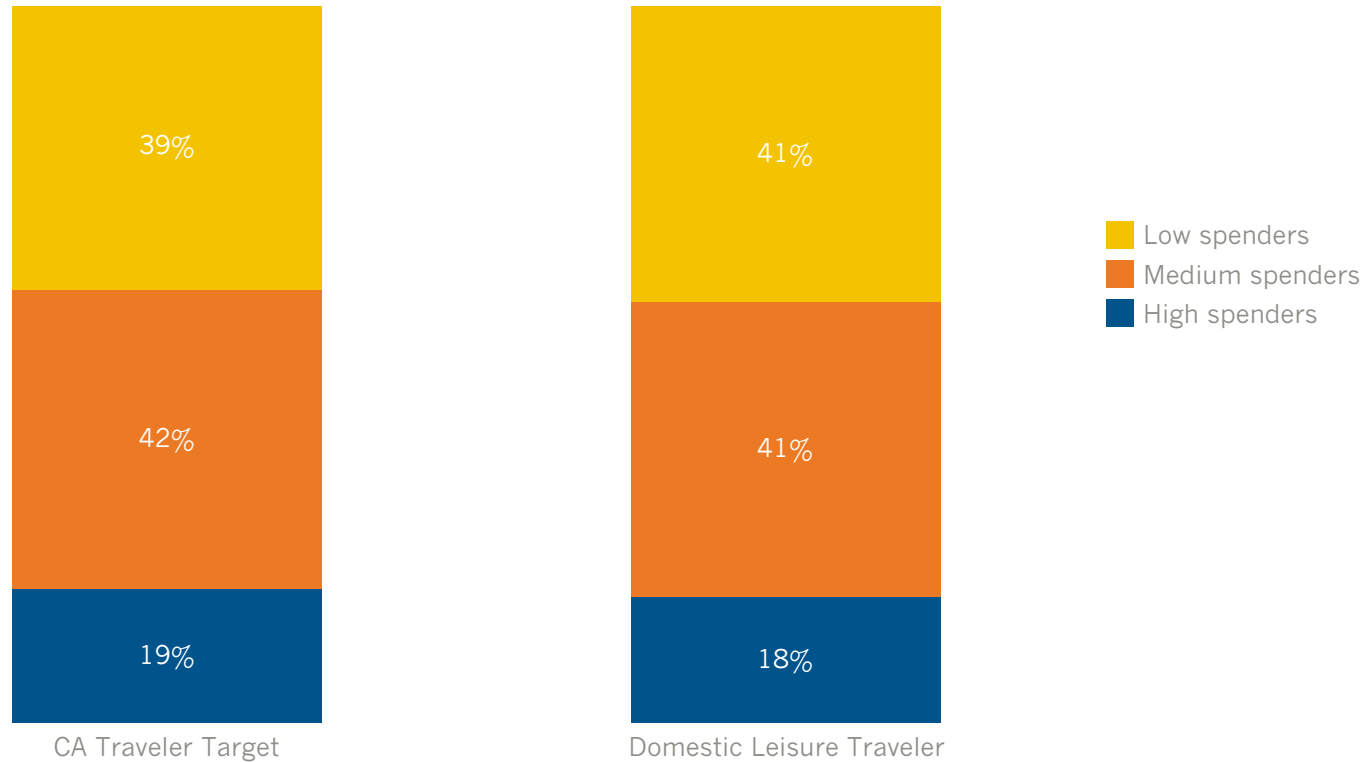


Travel Spending

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

United States

Travel Spending (from most recent vacation)





Media & Advertising

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

United States

Advertising Influences

	CA Traveler Target	Index
Social media	53%	119
Travel websites	41%	124
Online streaming services	33%	122
TV - Free to view channels	31%	114
Direct mail	30%	114
Billboards	23%	112
Magazines (digital)	22%	133
Podcast	20%	139
TV - paid/subscription	20%	132
Magazines (physical)	19%	123
Local newspaper (digital)	18%	121
National newspaper (digital)	17%	144
Radio	17%	113
Local newspaper (physical)	15%	125
Cinema	15%	113
Public transport	13%	140
National newspaper (physical)	12%	145

Sports Watched/Followed

	CA Traveler Target	Index
NFL	46%	107
Basketball	35%	123
Baseball	33%	112
Soccer/Football	20%	123
Tennis	17%	130
Ice Hockey	16%	111
Golf	14%	109
Gymnastics	14%	116
Swimming	14%	118
Boxing	13%	104
Volleyball	9%	119
Athletics/Track & Field	8%	122
Horse Racing	8%	109
Running/Marathon	7%	135
Cycling	6%	122
Surfing	4%	109
Rugby League	3%	115
Cricket	2%	114
Australian Rules Football	2%	103

Q Advertising: Thinking about your next travel or holiday related purchase,...where would you advertise to catch your attention?

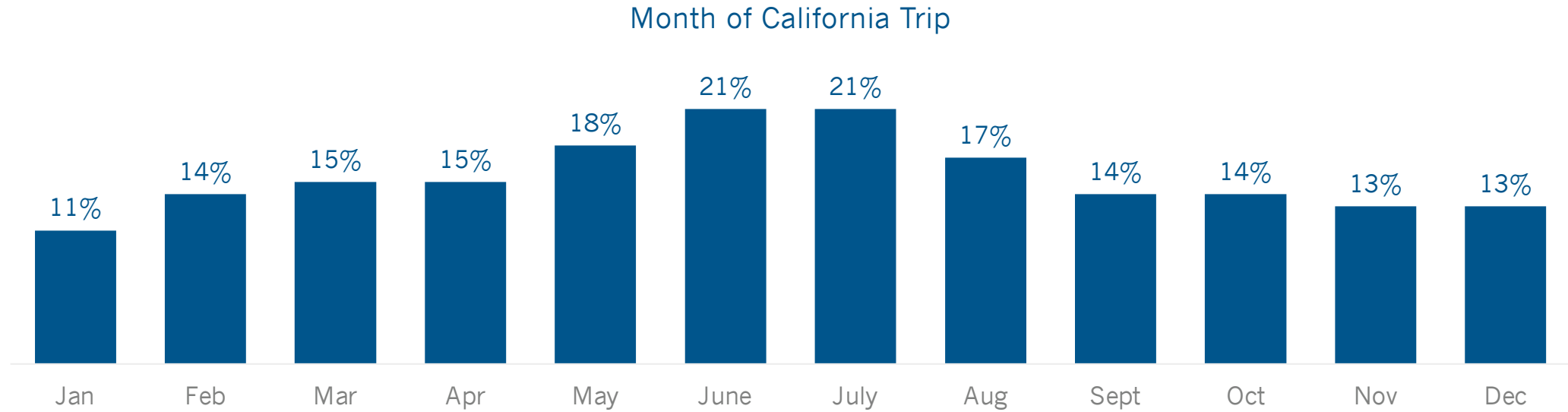
Q Sports: Which of the following sports do you watch or follow?



California Trip Details

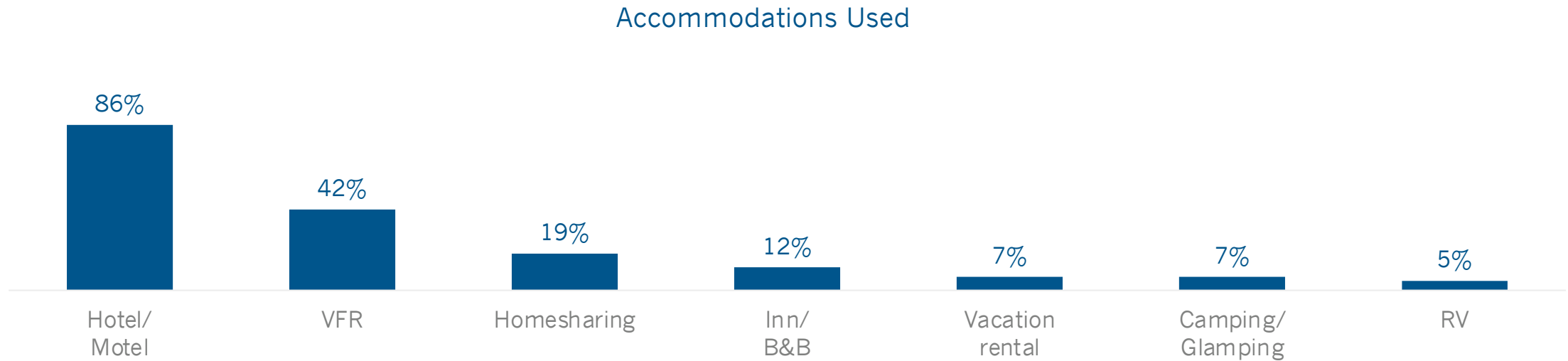
Trip Timing

The chart below shows the month of visit on a domestic trip to California.



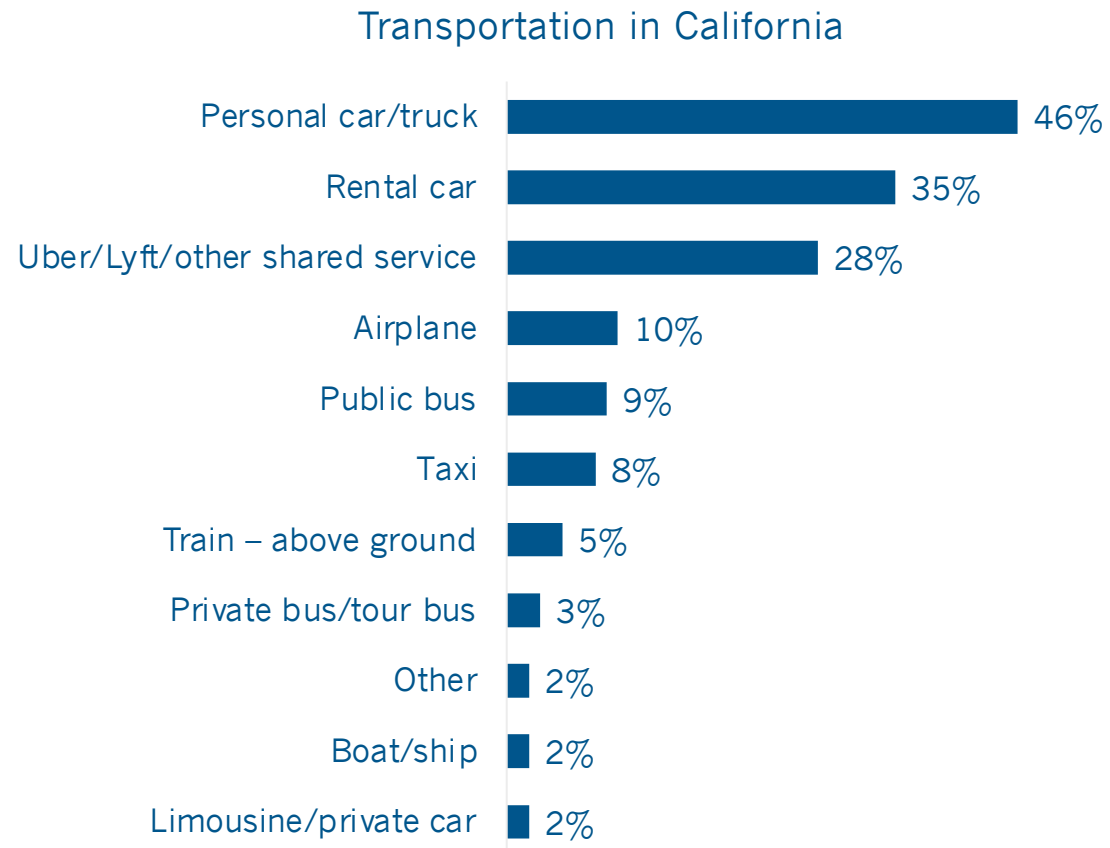
Types of Accommodations

The chart below shows the types of accommodations used on a domestic trip to California.



Transportation

The chart below shows the types of transportation used on a domestic trip to California and percent of domestic visitors taking a road trip.



Activities

The tables below show the types of activities participated in on a domestic trip to California and the influence of the activity on selecting California as a destination (destination driver), and the net influence as a destination driver.

Activities	Participate	Driver (among participate)	Net Driver (among total)
Went to the beach	46%	62%	29%
Viewed and enjoyed natural scenery	43%	57%	25%
Dined/ordered takeout at a local restaurant(s)	50%	38%	19%
Visited a theme or amusement park	22%	69%	15%
Explored a city/urban area	34%	37%	13%
Drove on scenic byways or roads	28%	40%	11%
Shopped at a unique local shop or shopping district	30%	29%	9%
Visited state or national parks	19%	44%	8%
Explored small towns	23%	35%	8%
Nightlife	17%	44%	7%
Shopped at a mall or outlet mall	29%	24%	7%
Hiked	20%	33%	7%
Visited museums, science centers or exploratoriums	17%	33%	6%
Visited a winery or wine regions	14%	39%	5%
Visited famous movie/TV locations, studio tours, celebrity home tours	13%	41%	5%
Visited a zoo or aquarium	15%	35%	5%

Activities	Participate	Driver (among participate)	Net Driver (among total)
Visited historical sites	20%	26%	5%
Attended a live music event, concert or festival	12%	37%	4%
Attended a live sporting event	8%	53%	4%
Visited a casino	10%	42%	4%
Outdoor activities such as biking, ziplining, parasailing	10%	37%	4%
Dined/ordered takeout at a Michelin-starred or recommended restaurant	10%	31%	3%
Participated in cannabis related activities or events	7%	39%	3%
Water sports activities such as surfing, paddleboarding, boating, etc.	8%	30%	2%
Explored farm tours or farm trails/going to a farmers' market	7%	29%	2%
Visited a microbrewery	6%	28%	2%
Visited a spa or wellness center	7%	24%	2%
Visited art museums or other visual arts venues	12%	14%	2%
Attended a culinary festival or event	7%	21%	1%
Attended performing arts events (theater, dance, etc.)	7%	19%	1%
Snow sports activities	5%	22%	1%
Golfed	4%	24%	1%

Regional Visitation

The table below shows the regions visited on a domestic trip to California.

Region	% Visited (all visitors)
Los Angeles County	47%
San Francisco Bay Area	26%
San Diego County	24%
Central Coast	21%
Orange County	15%
Central Valley	11%
Inland Empire	11%
Deserts	8%
North Coast	7%
Gold Country	6%
High Sierra	6%
Shasta Cascade	3%