

Global Market Profile

AUSTRALIA



September 2023

Introduction

- Tourism Economics forecasts international visitation to California will account for \$24B in tourism spending in 2023 and increase to \$28B in 2024, fully recovered to 2019 spending. While important North American and European visitor markets are either fully recovered or nearly recovered, visitation from markets in the Asia Pacific region continues to lag and hold back California's Gateway regions from fully recovery. Despite the uneven recovery, California's core international markets are critical to the success and growth of the tourism industry in the state.
- The **Global Market Profile** report has been developed by Visit California Research to provide insights on California's opportunity international markets.

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 fourteen Visit California target markets. Panelists are surveyed on preferred trip types, booking methods, accommodation preferences, and advertising perceptions.
 - The audience profile is built on a segmentation of likely international leisure travelers in the market. For markets with enough sample size, the segmentation includes an additional filter of travelers considering California as a destination. The profile of these custom targets across California's target markets will 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).

Audience Profile Definitions

Audience Profile of: <i>International Leisure Travelers Considering CA</i>	Audience Profile of: <i>International Leisure Travelers</i>
Australia	Brazil
Canada	China
France	Italy
Germany	Japan
India	Middle East*
Mexico	Scandinavia**
South Korea	
UK	

*Saudi Arabia and UAE

**Denmark, Finland, Norway and Sweden



Market Landscape

Country Profile

Australia



POPULATION: *

26.4M

EXCHANGE RATE: **

Local currency to USD dollar

1.6

GROSS DOMESTIC PRODUCT (GDP):

Annual % chg ***

1.6%

INFLATION RATE:

Annual % chg ****

5.3%

* www.worldometers.info, 2023

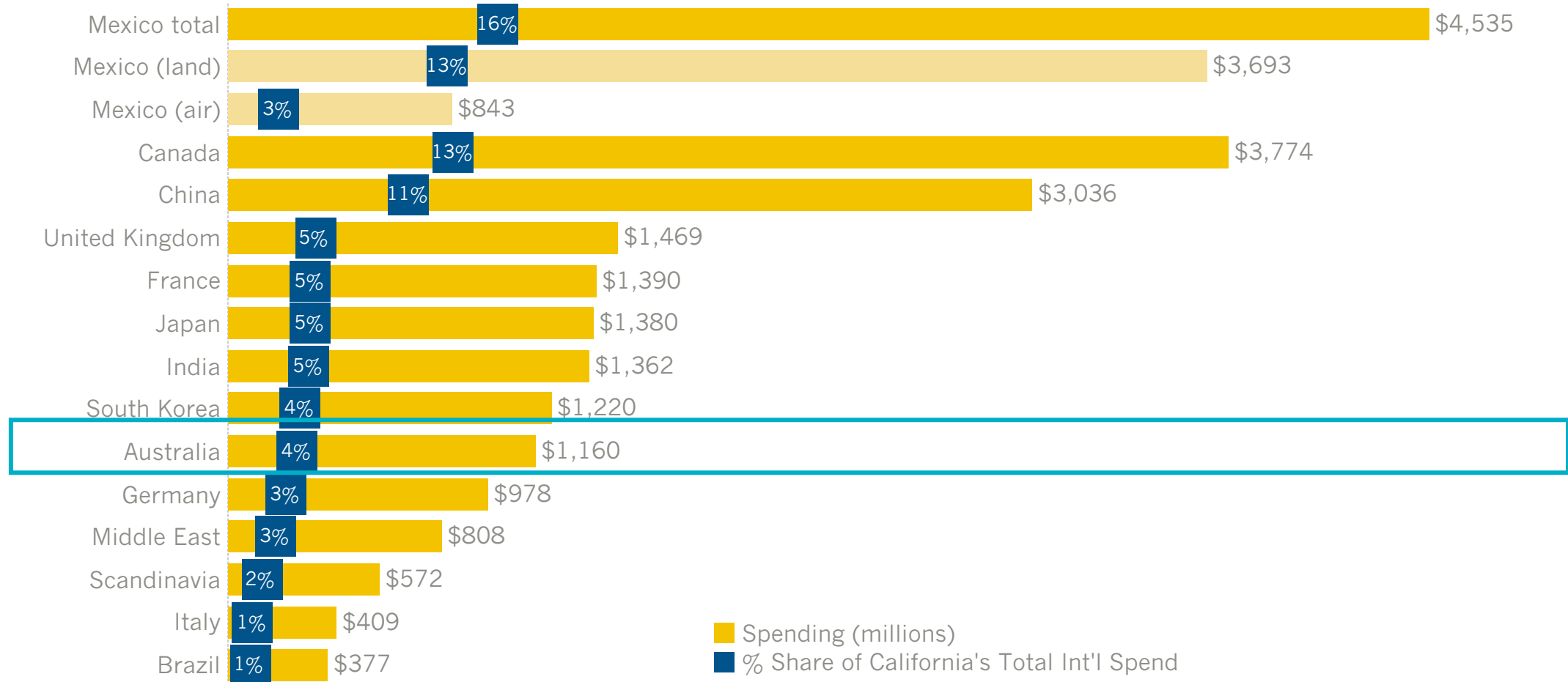
** www.x-rates.com, Aug 2023

*** 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.



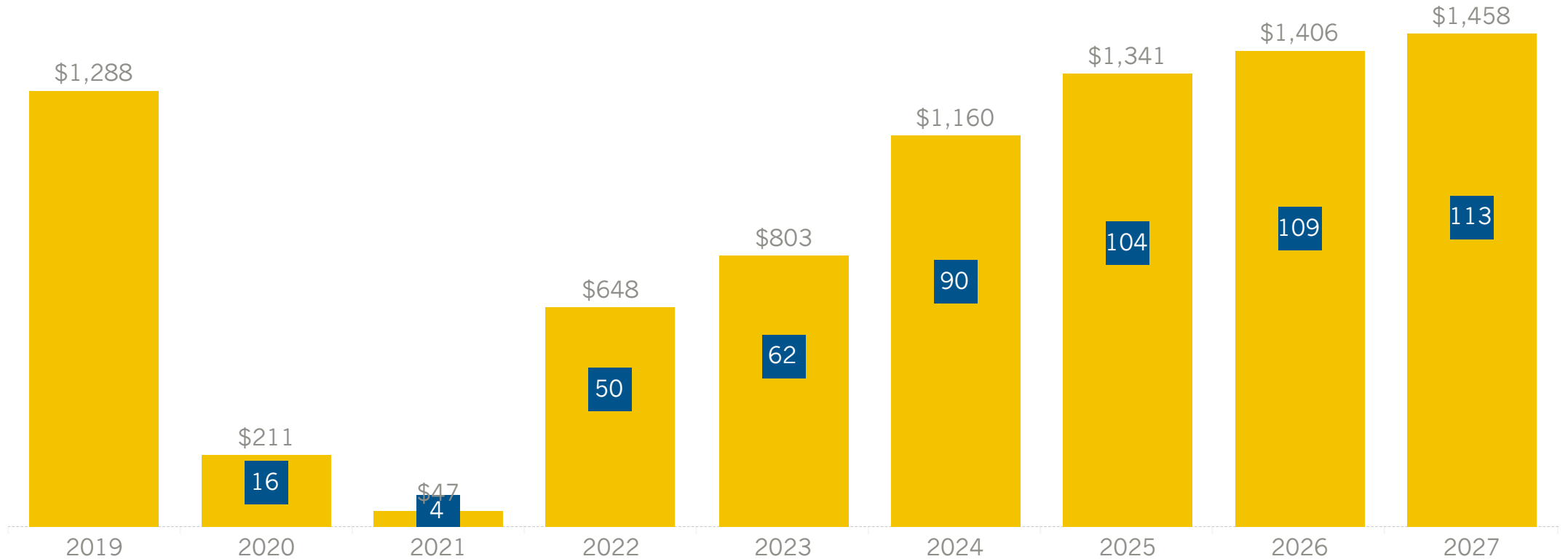
Forecast: Visitor Spending

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

■ Spending (millions)

■ Recovery Index to 2019



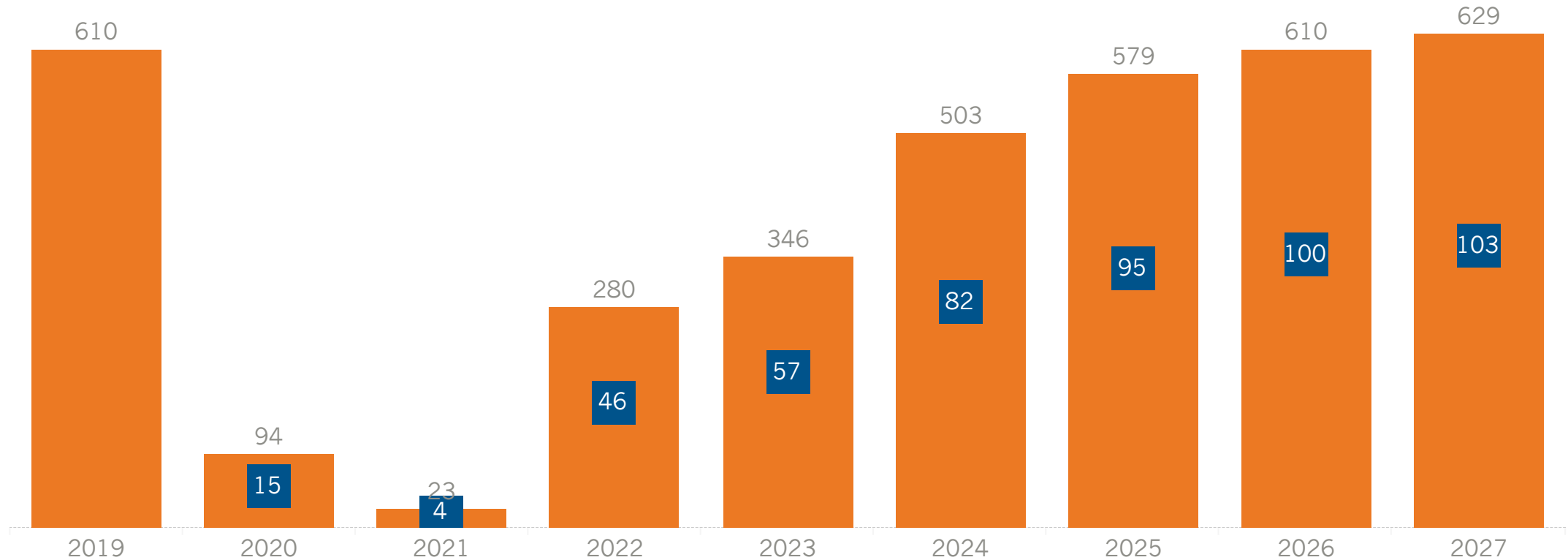
Forecast: Visitor Volume

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

Australia: Visitation Forecast with Recovery Index to 2019

■ Visitation (thousands)

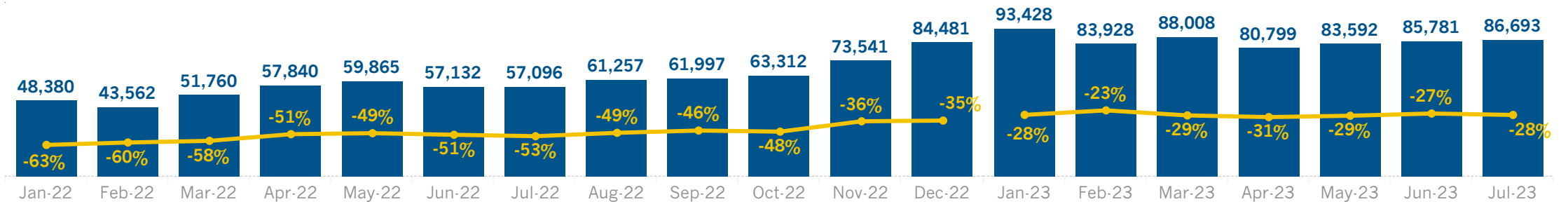
■ Recovery Index to 2019



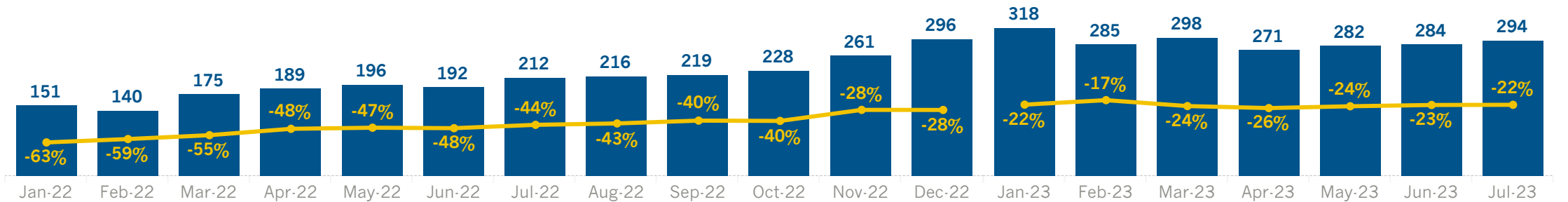
Airlift to California

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)



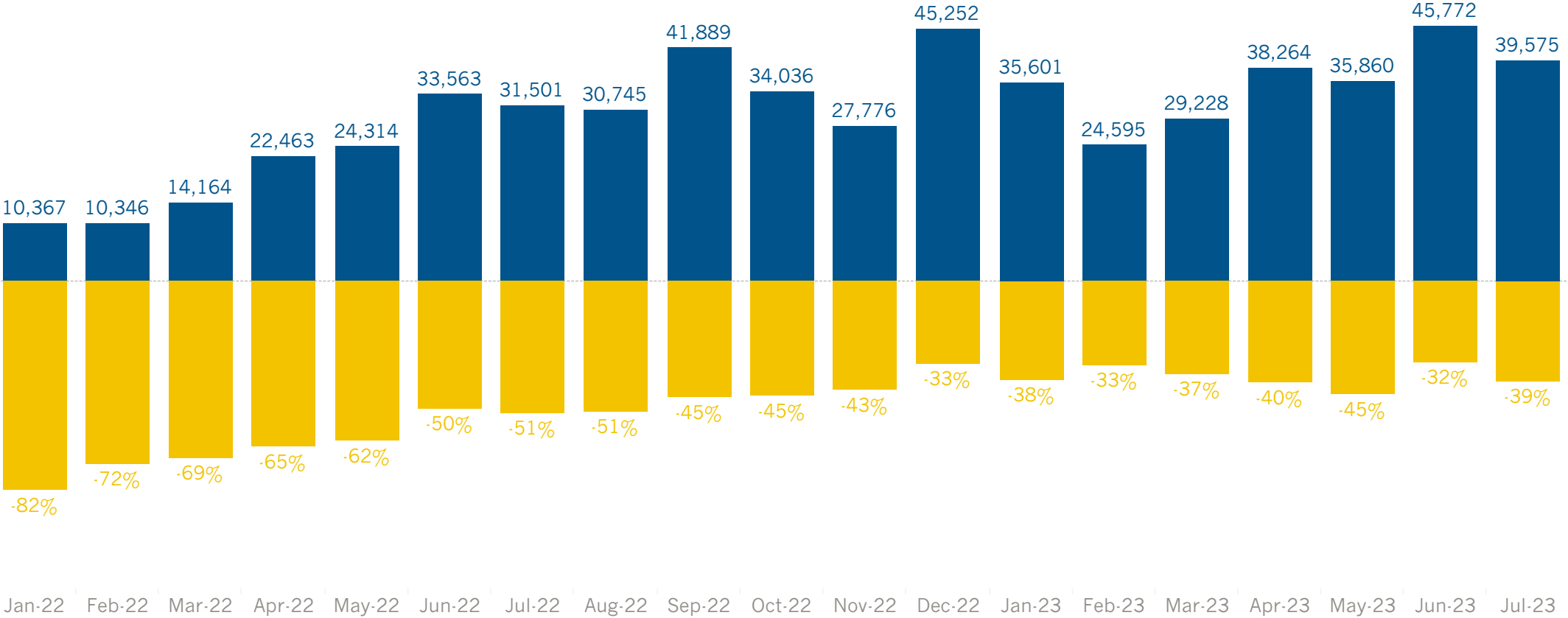
Australia: Non-Stop Flights to CA (% chg vs 2019)



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)

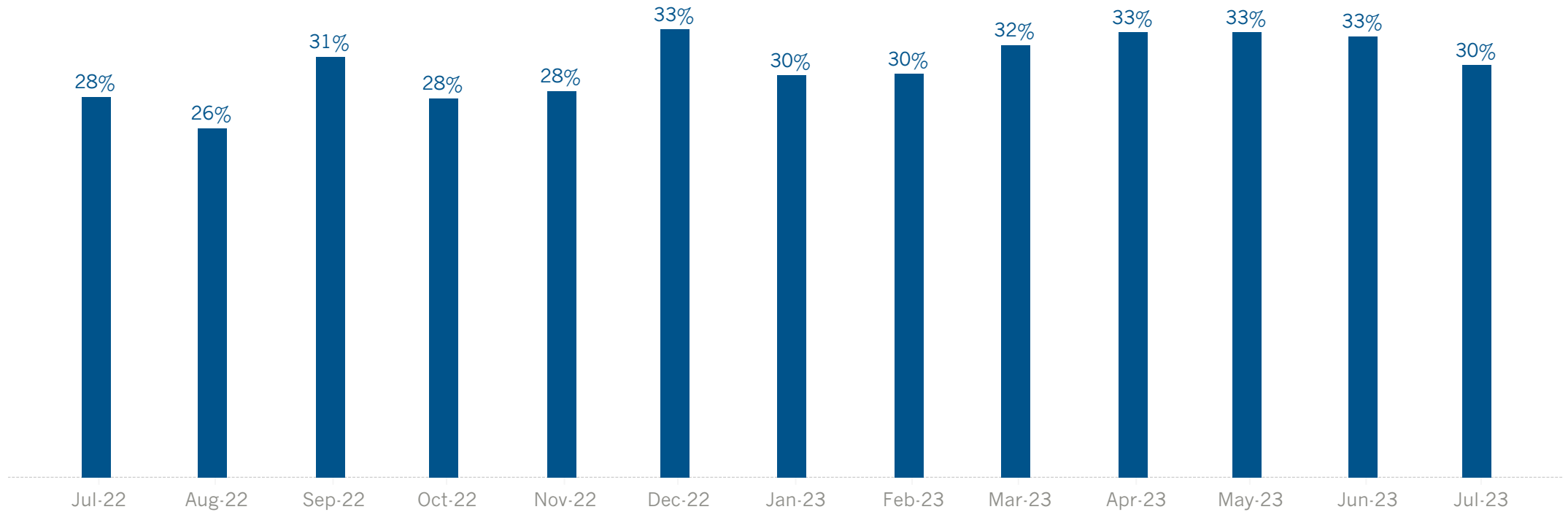


Source: NTT, CIC Research

California's Share of Arrivals

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

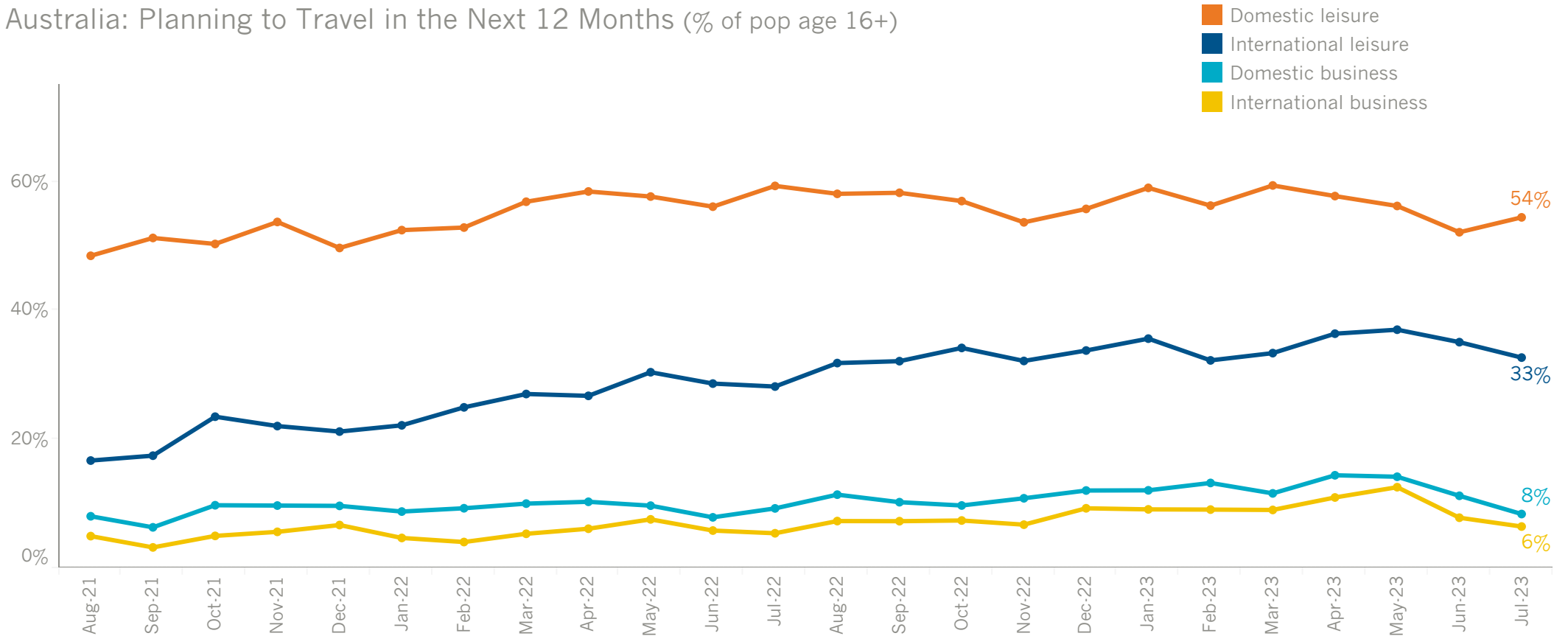
Australia: California Market Share of Arrivals Based on First Intended Address (%)



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+)



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

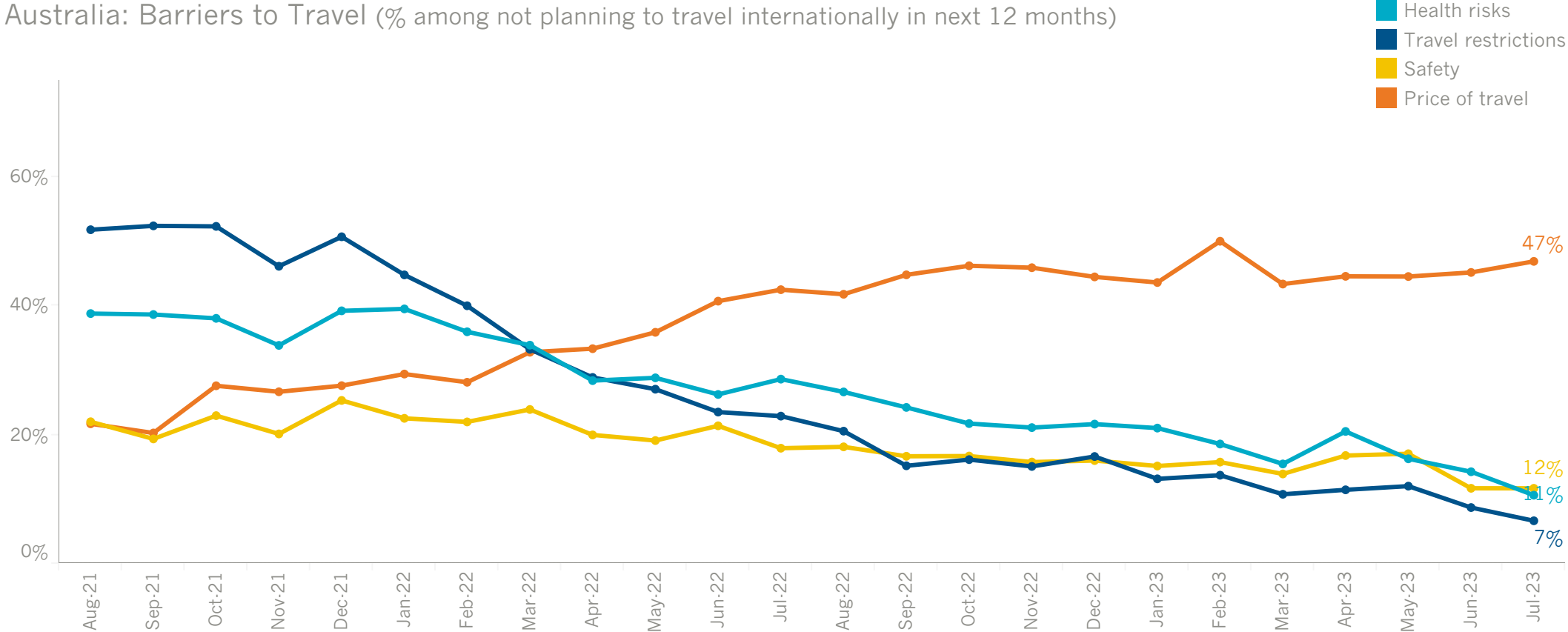
Data reported for: July 2023

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.

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 for: July 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.

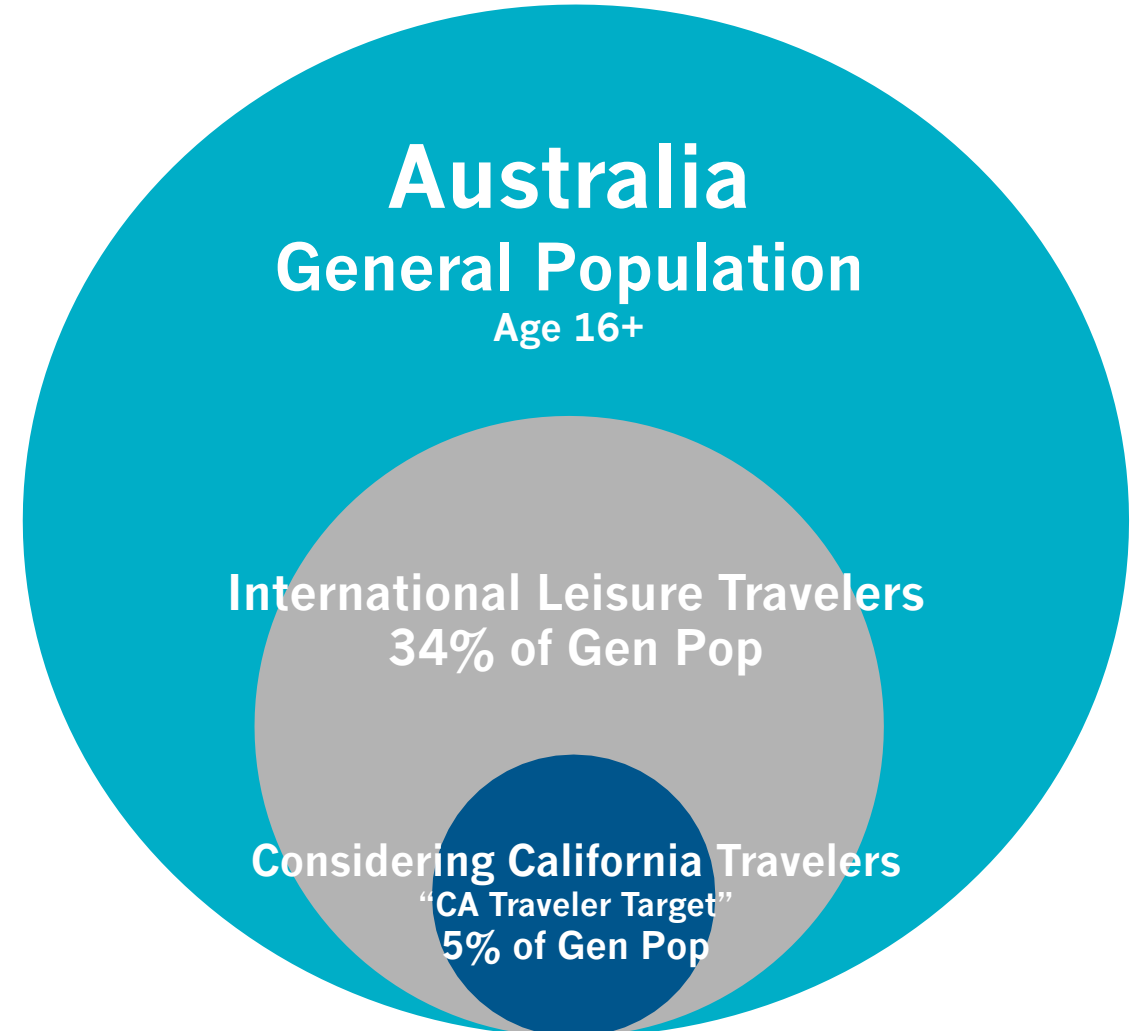
Definitions:

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
Silent	2%	84

Generation Definitions:

- Gen Z (2000 and later)
- Millennial (1982-1999)
- Gen X (1965-1981)
- Boomer (1946-1964)
- Silent (<1945)

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%	112

Marital Status		
	CA Traveler Target	Index
Single	16%	78
Married	66%	119

Family Status		
	CA Traveler Target	Index
Children <18	50%	134

Age		
	CA Traveler Target	Index
Age 16-24	6%	53
Age 25-34	30%	124
Age 35-44	27%	115
Age 45-54	18%	131
Age 55+	19%	70

Generation		
	CA Traveler Target	Index
Gen Z	5%	59
Millennial	51%	115
Gen X	29%	124
Baby Boomer	13%	60
Silent	2%	84

Income*		
	CA Traveler Target	Index
Higher income	51%	122
Middle income	27%	92
Lower income	14%	77
Prefer not to say	8%	76

Region		
	CA Traveler Target	Index
New South Wales	36%	105
Victoria	25%	99
Queensland	16%	93
Western Australia	9%	78
South Australia	7%	112
Northern Territory	3%	368
Australian Capital	2%	92
Tasmania	1%	59

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



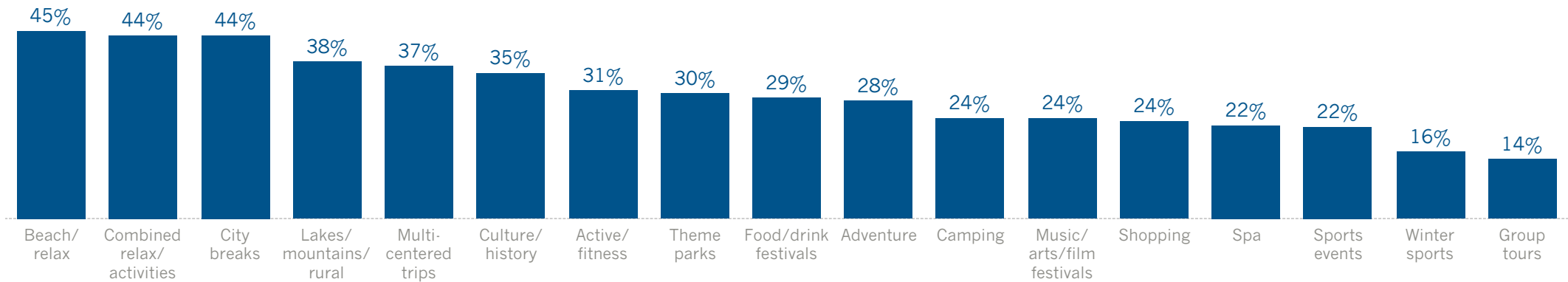
Int'l leisure travelers
considering California
"CA Traveler Target"

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	35%	96
Adventurous	18%	140
Luxury	13%	93
All-inclusive	10%	105
Responsible	9%	73

Travel Party (from most recent vacation)

	CA Traveler Target	Index
My partner	73%	118
My children	41%	120
Friend(s)	27%	126
Other family	16%	92
Solo	7%	61
Other person(s)	4%	138

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 (July 2022-June 2023)



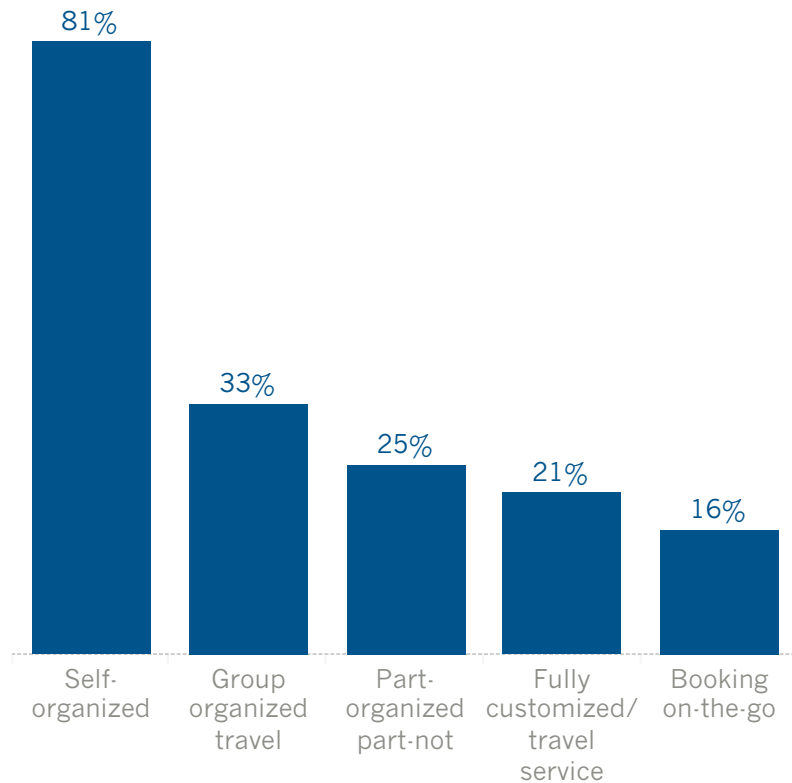
Int'l leisure travelers
considering California
"CA Traveler Target"

Organizing/Planning Methods

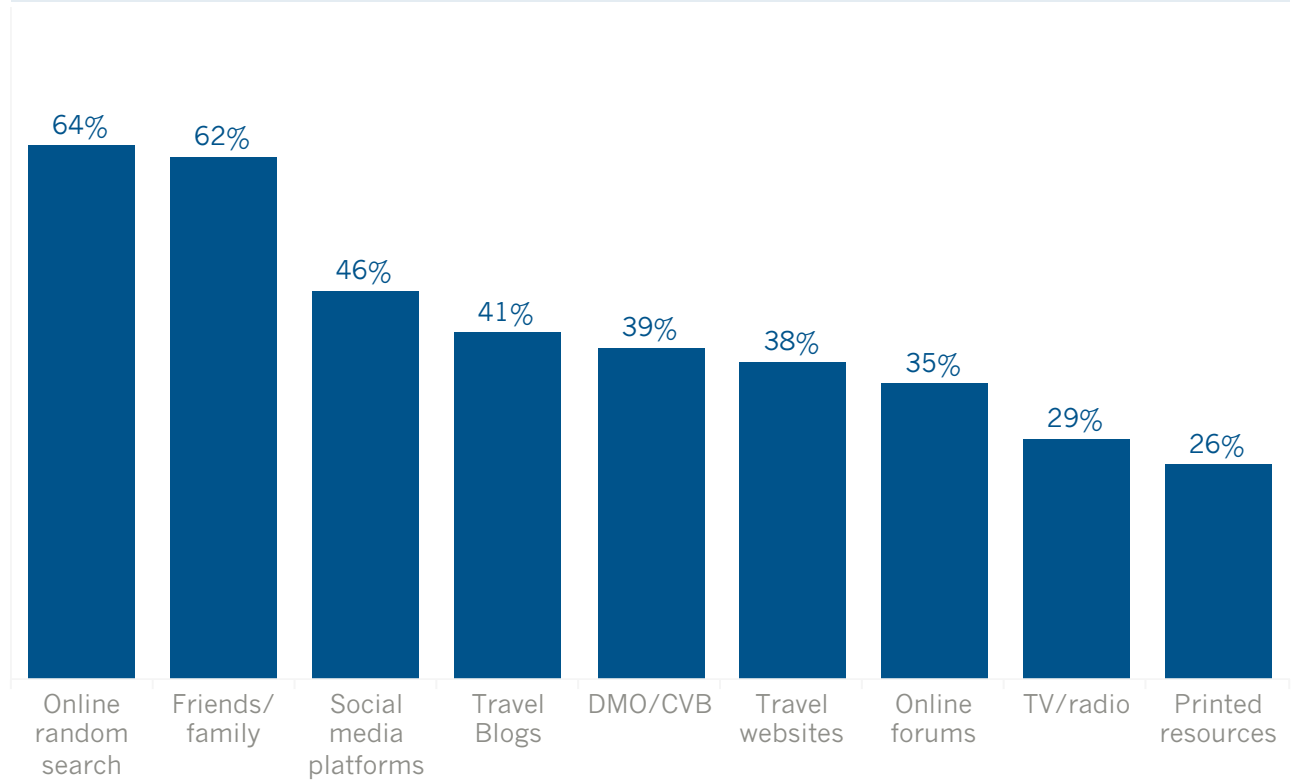
The chart below shows the organizing and planning methods of of the consumer target in the focus market.

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 (July 2022-June 2023)

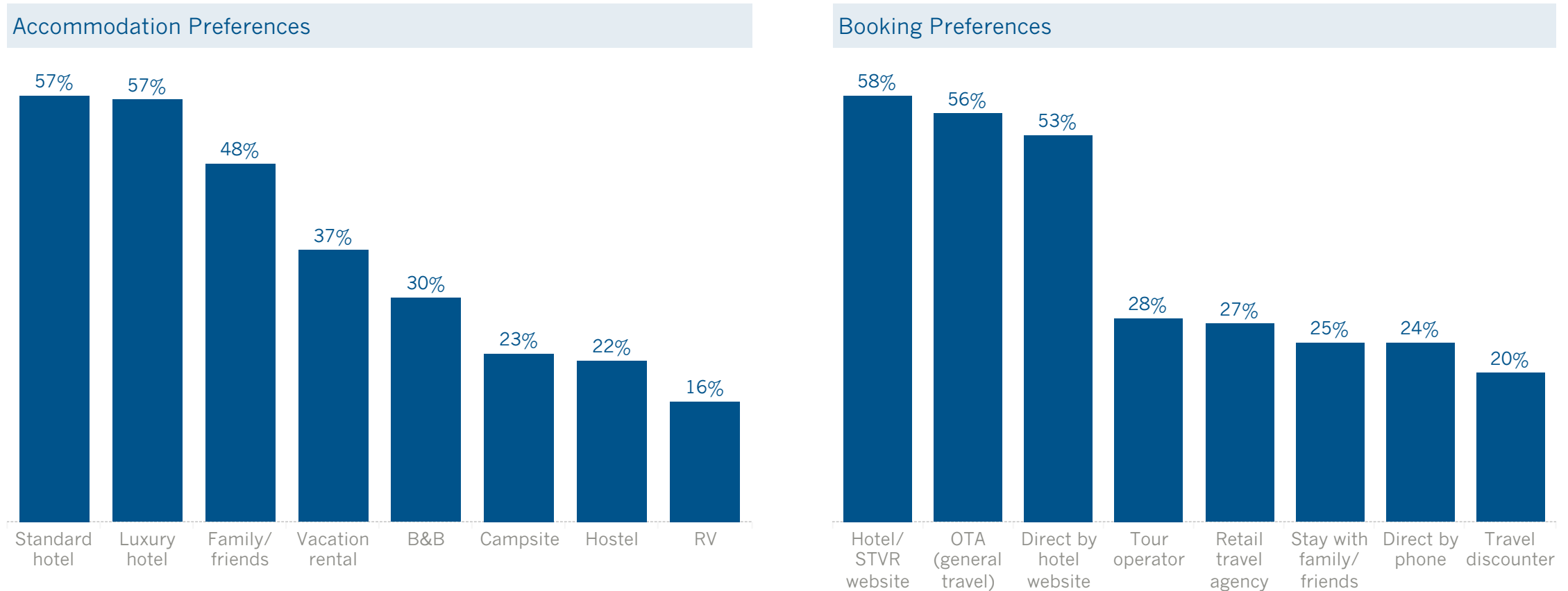


Int'l leisure travelers
considering California
"CA Traveler Target"

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?



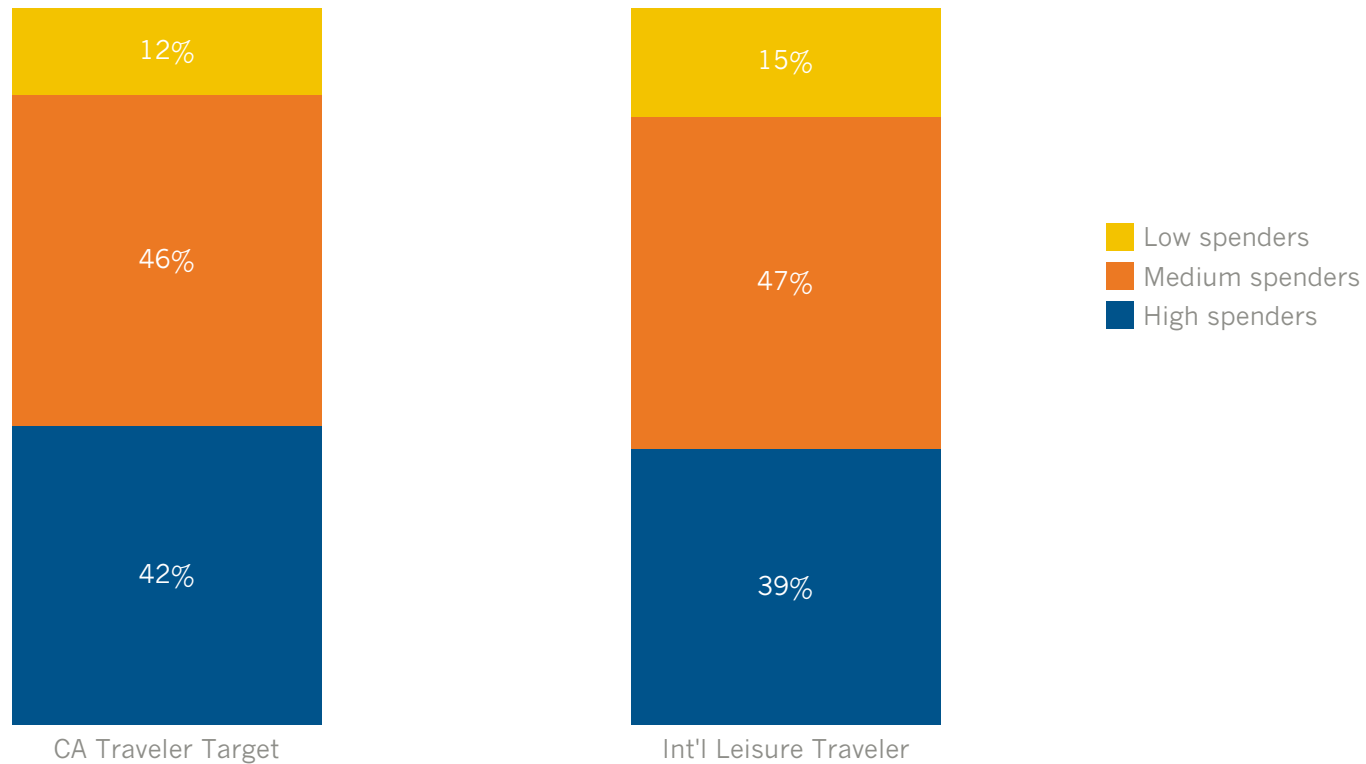
Int'l leisure travelers
considering California
"CA Traveler Target"

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	57%	140
Travel websites	46%	129
Online streaming services	41%	157
Cinema	41%	160
TV - Free to view channels	33%	119
Billboards	36%	142
Direct mail	33%	131
Magazines (digital)	30%	156
National newspaper (digital)	30%	176
Local newspaper (digital)	26%	140
Local newspaper (physical)	25%	129
TV - paid/subscription	27%	192
Radio	25%	169
National newspaper (physical)	23%	149
Magazines (physical)	21%	127
Public transport	21%	138
Podcast	19%	156

Sports Watched/Followed

	CA Traveler Target	Index
Tennis	40%	134
Australian Rules Football	35%	123
Soccer/Football	35%	142
Swimming	33%	148
Cricket	27%	115
Rugby League	29%	145
Basketball	29%	167
Cycling	22%	194
Boxing	22%	193
NFL	22%	217
Running/Marathon	18%	177
Gymnastics	18%	173
Athletics/Track & Field	18%	190
Baseball	18%	224
Surfing	17%	186
Golf	13%	121
Horse Racing	13%	143
Volleyball	12%	165
Ice Hockey	10%	172

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 (July 2022-June 2023)



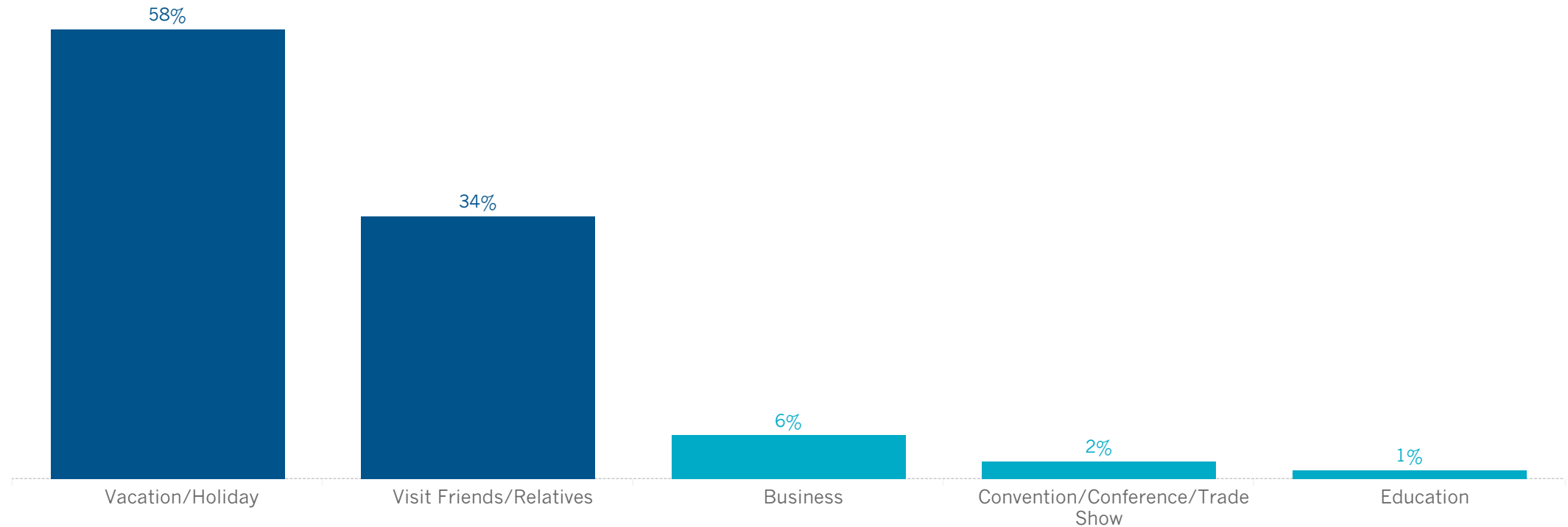
California Travelers & California Trip Characteristics

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



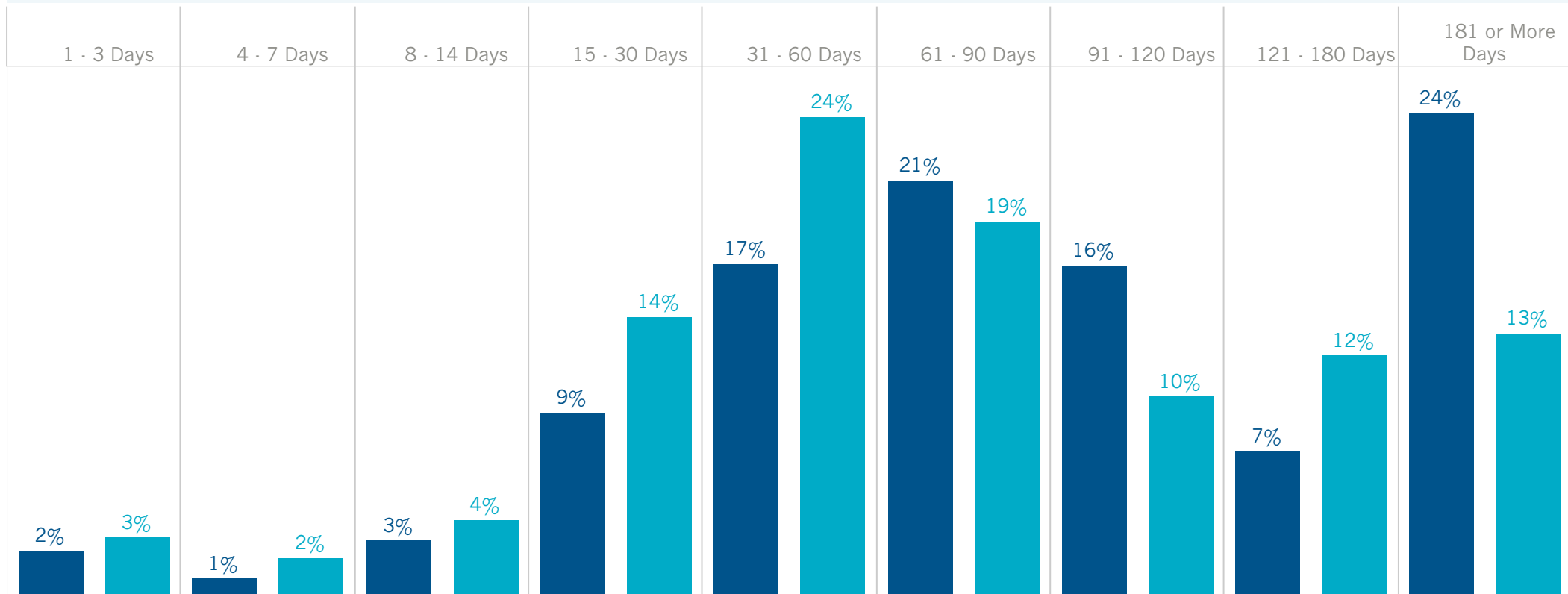


Decision Making vs Reservations

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

Australia

Decision Making vs Reservations



- 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?

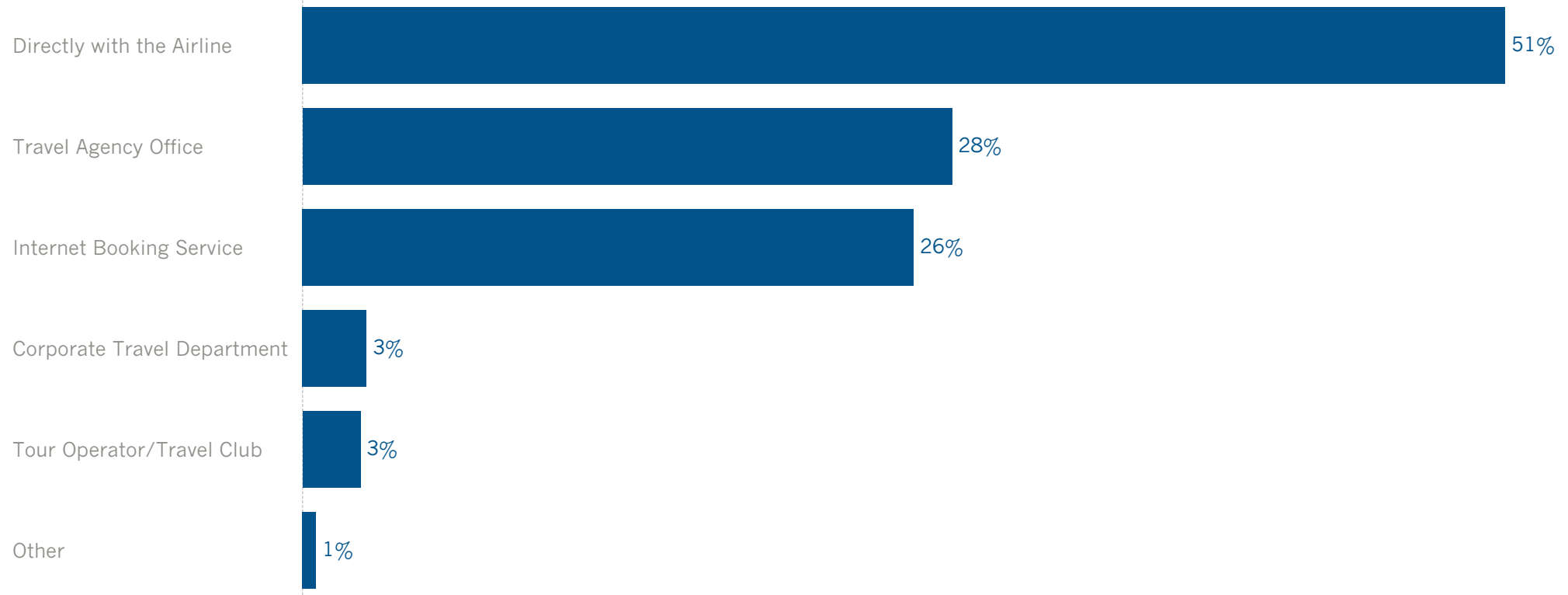


Airline Reservations

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

Australia

Airline Reservations



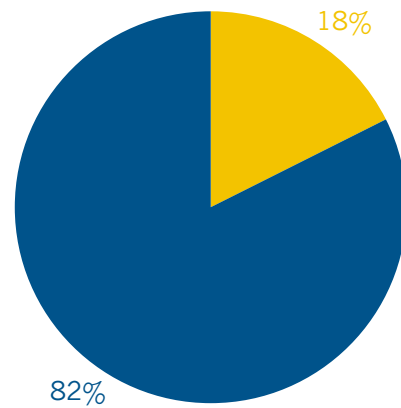


First/Repeat Visitation, Travel Party Size

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

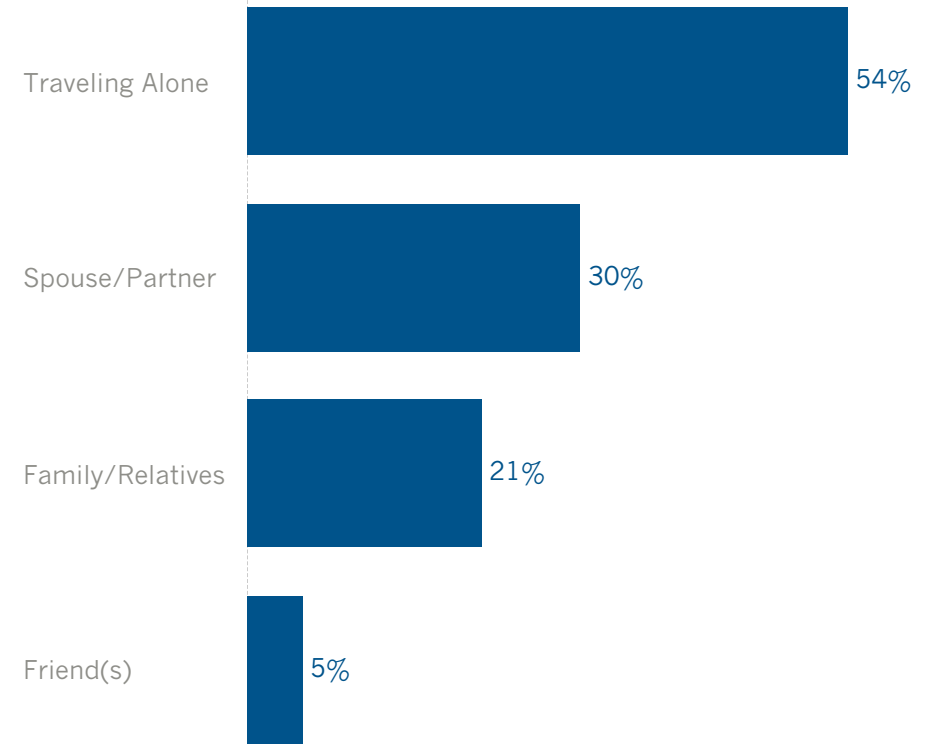
Australia

First trip to the US



■ Yes
■ No

Travel Companion



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

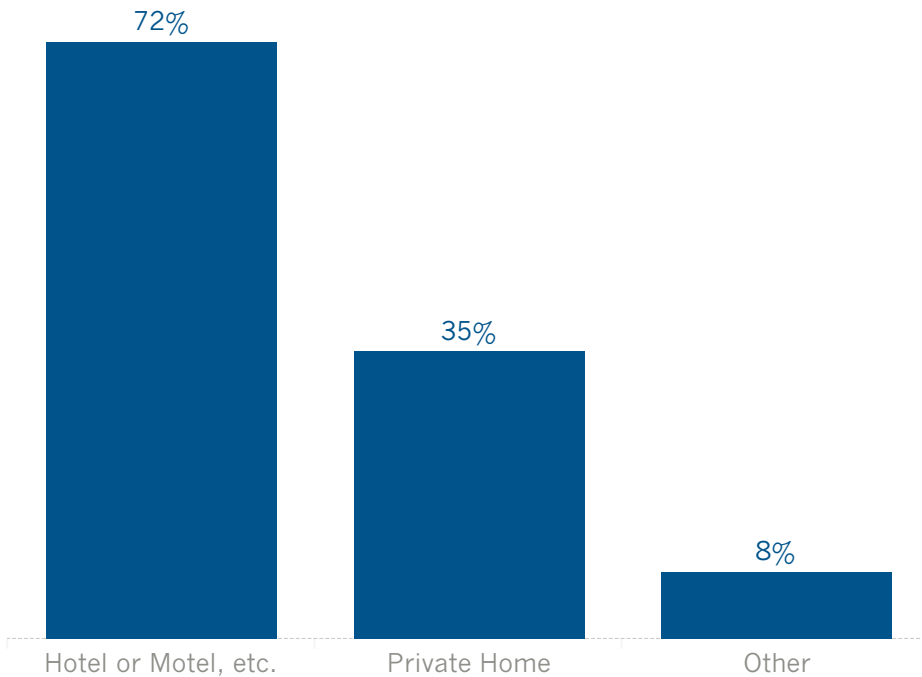


Types of Accommodations & Nights

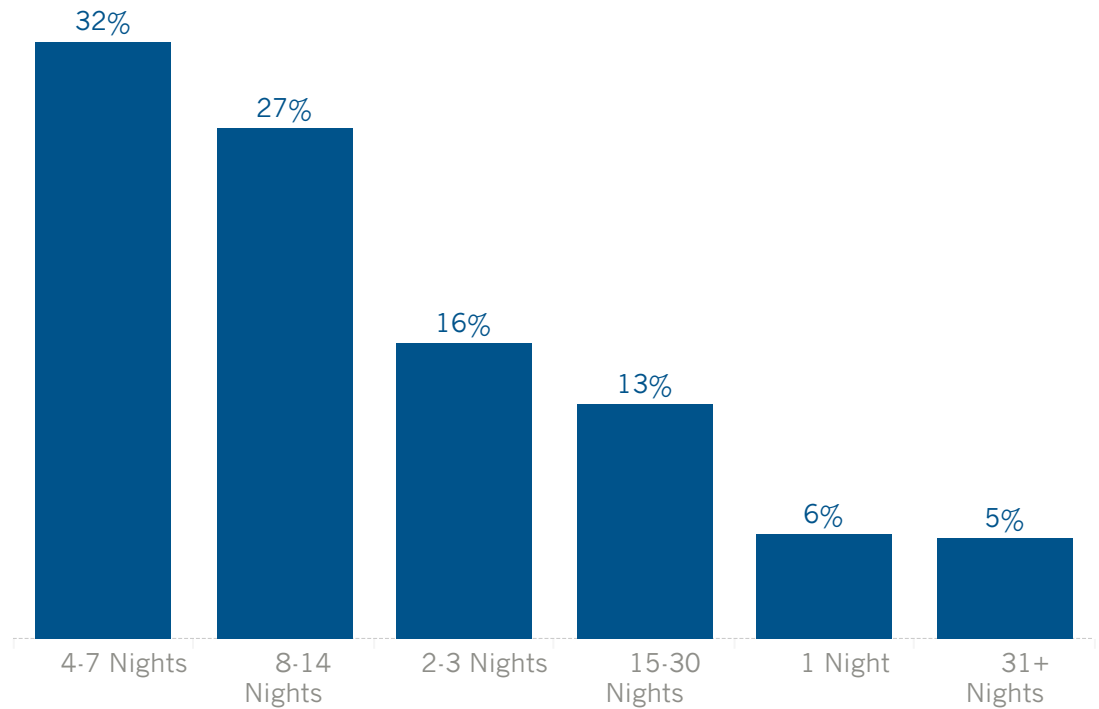
The charts below show types of accommodations stayed in and number of nights in destination among travelers from the focus market.

Australia

Types of Accommodations



Nights in Destination



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

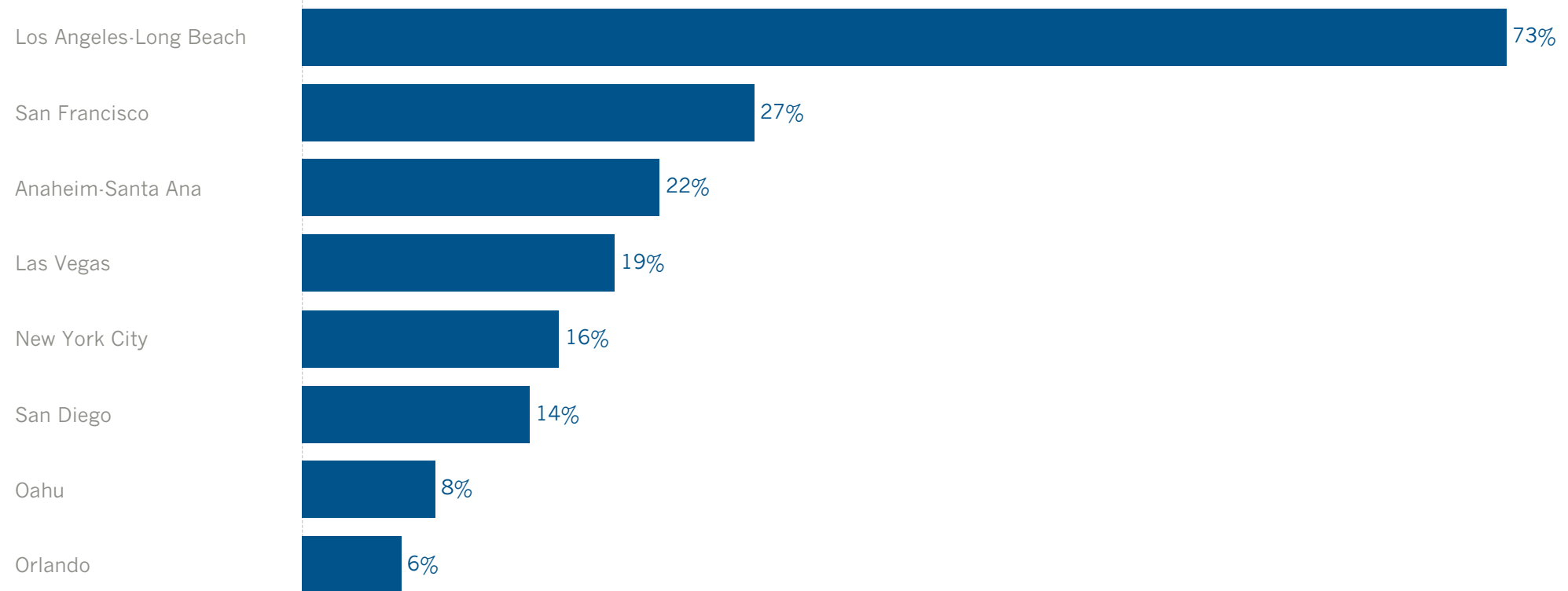


Destinations Visited

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

Australia

US Destinations visited



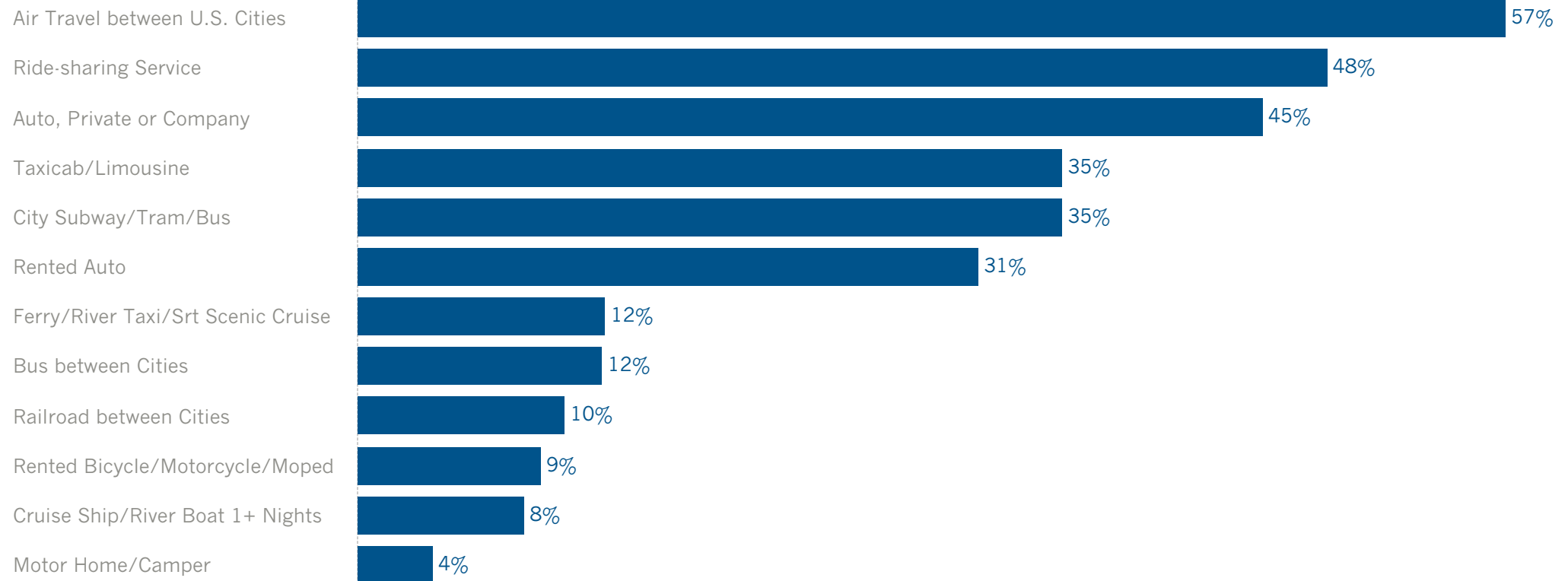


Transportation

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

Australia

Types of Transportation



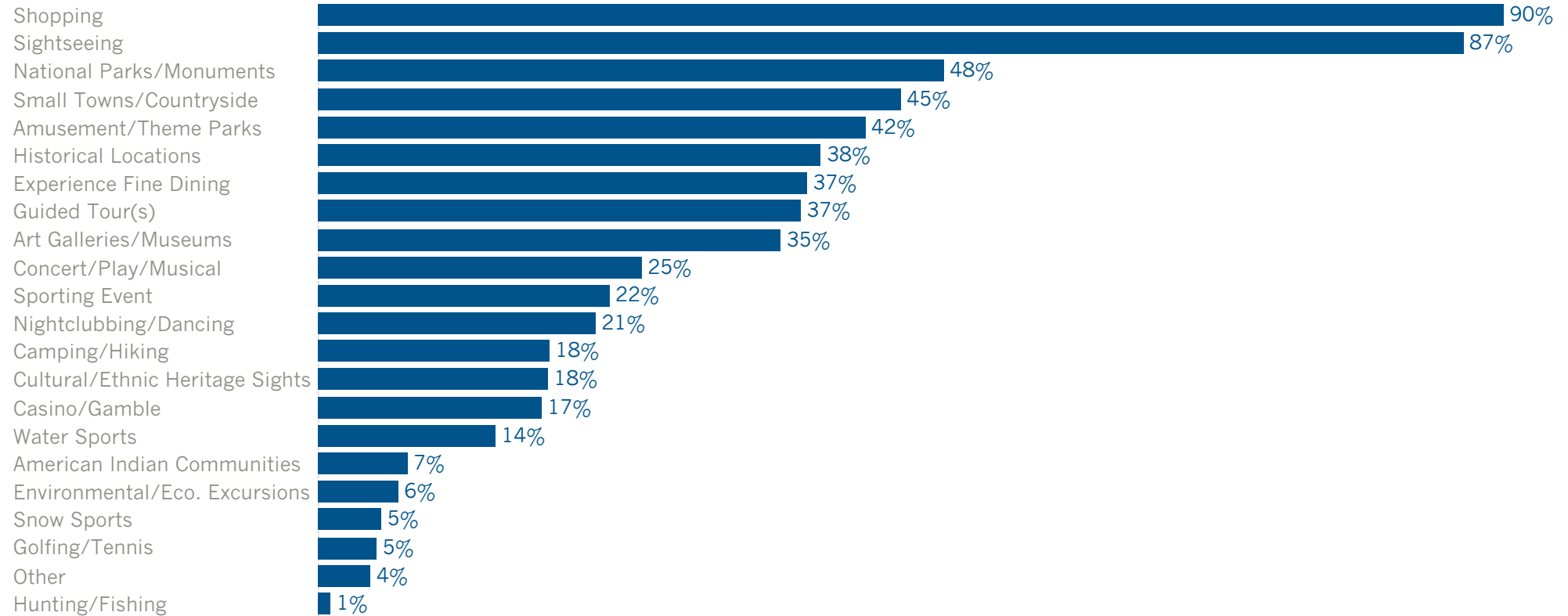


Activities

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

