Global Market Profile

FRANCE

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: *International Leisure Travelers Considering CA*	Audience Profile of: *International Leisure Travelers*
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

France

POPULATION: *
64.8M

EXCHANGE RATE: **
Local currency to USD dollar
0.9

GROSS DOMESTIC PRODUCT (GDP):
Annual % chg ***
0.7%

INFLATION RATE:
Annual % chg ****
5.0%

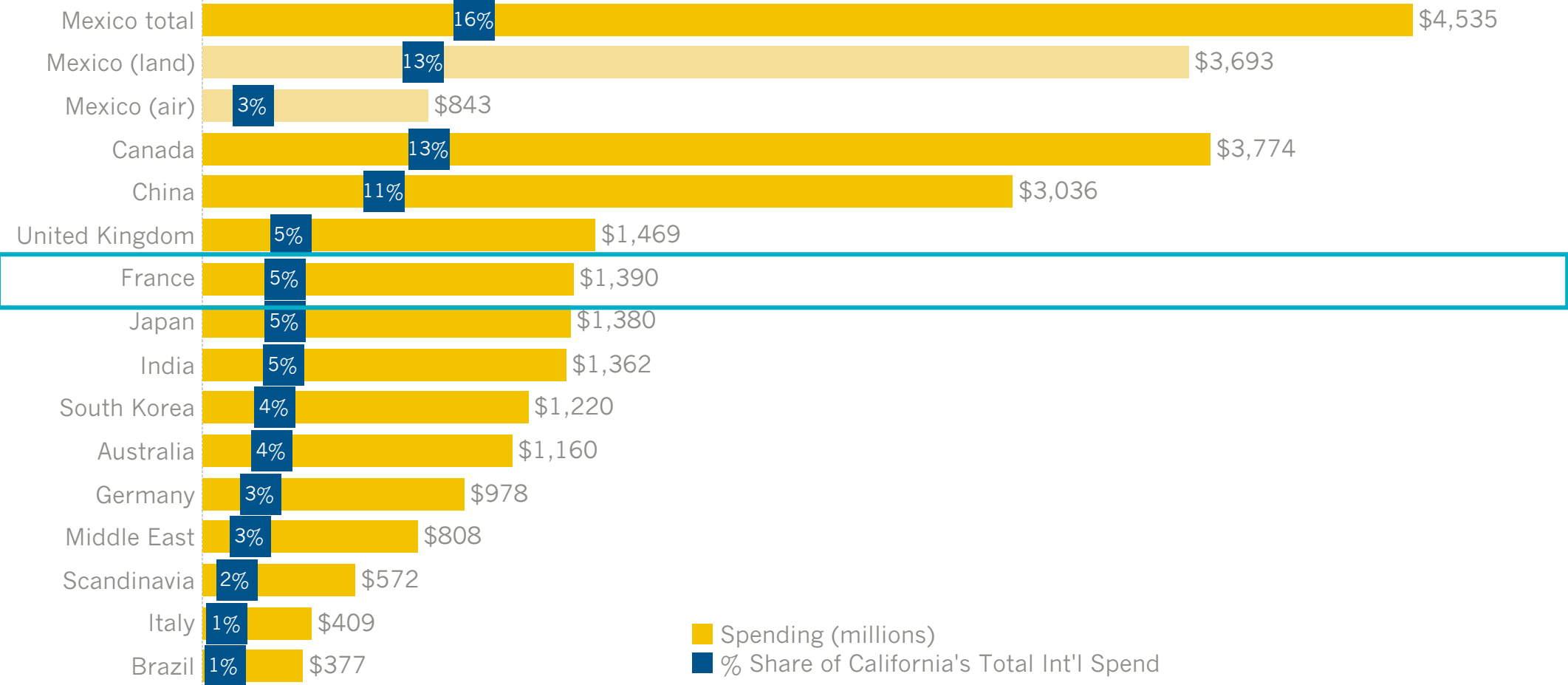# Forecast: Visitor Spending by Market (2024)

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.

Market	% Share	Spending (millions)
Mexico total	16%	$4,535
Mexico (land)	13%	$3,693
Mexico (air)	3%	$843
Canada	13%	$3,774
China	11%	$3,036
United Kingdom	5%	$1,469
France	5%	$1,390
Japan	5%	$1,380
India	5%	$1,362
South Korea	4%	$1,220
Australia	4%	$1,160
Germany	3%	$978
Middle East	3%	$808
Scandinavia	2%	$572
Italy	1%	$409
Brazil	1%	$377

■ Spending (millions)
■ % Share of California's Total Int'l Spend

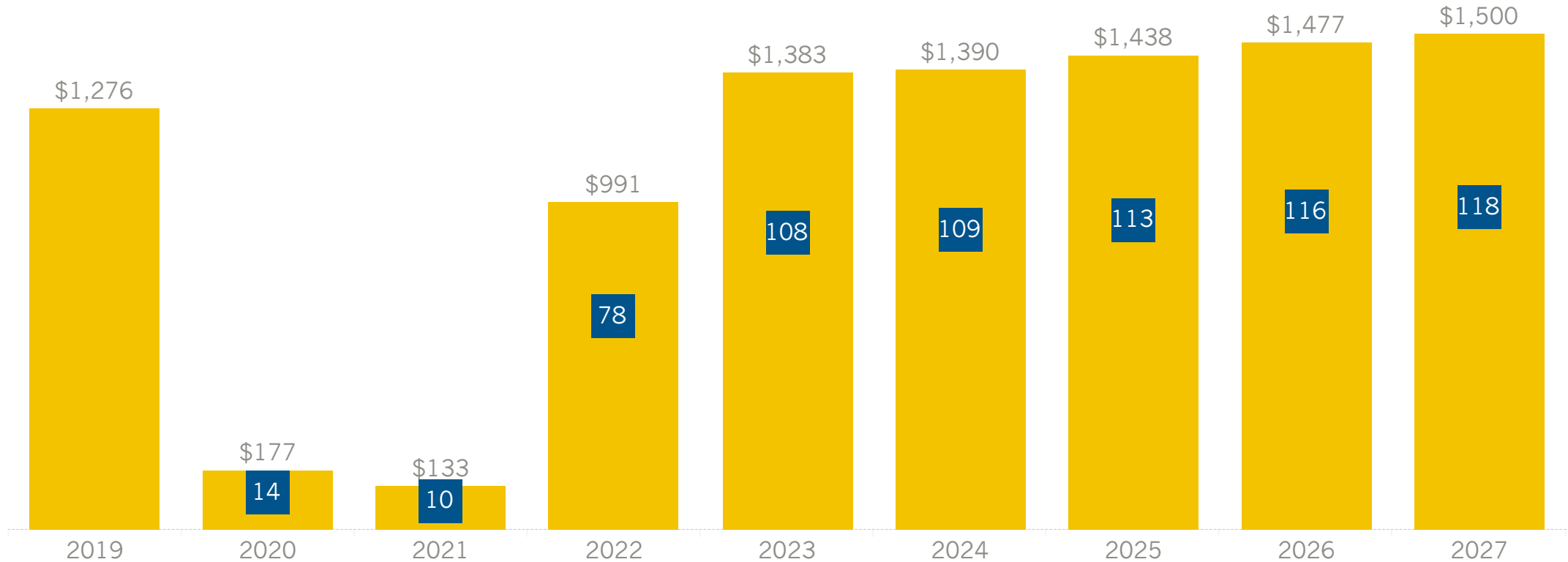Source: Tourism Economics (Sept 2023)

Forecast: Visitor Spending

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

France: Visitor Spending Forecast with Recovery Index to 2019

■ Spending (millions)   ■ Recovery Index to 2019

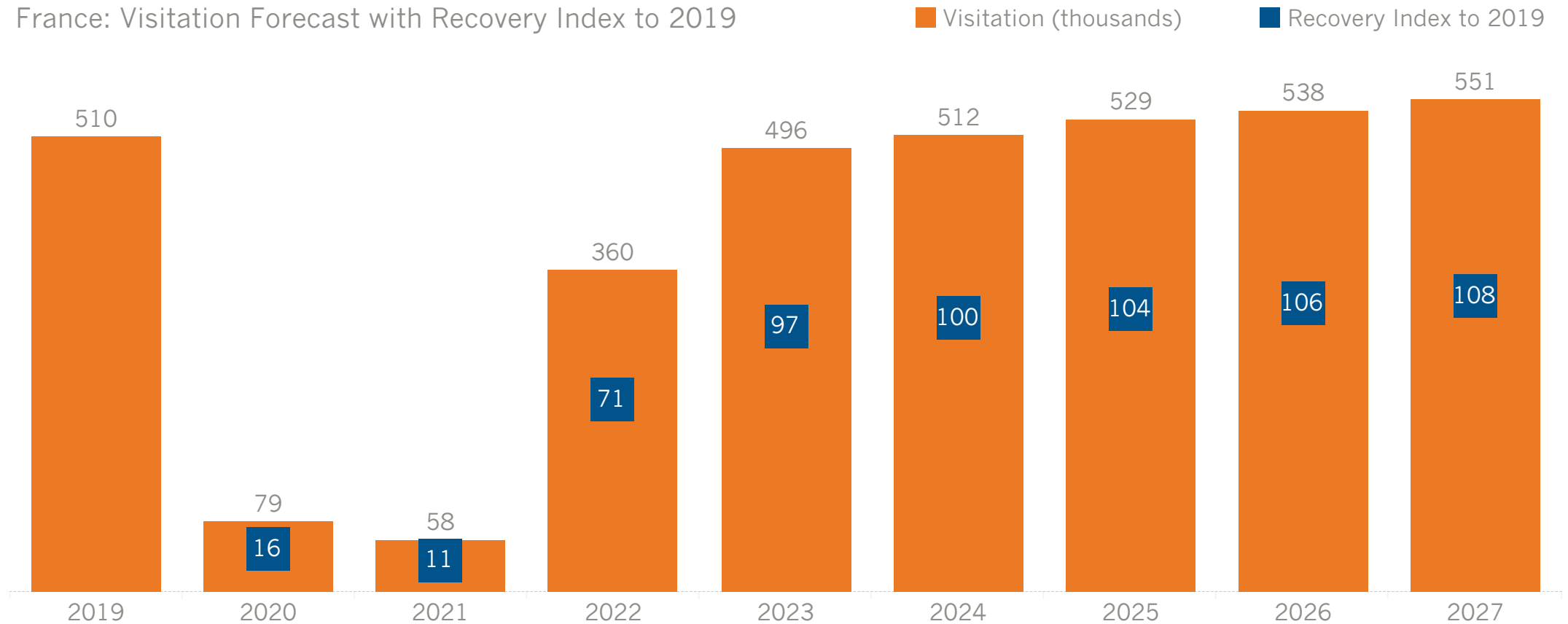| Year	Spending	Recovery Index
2019	$1,276	
2020	$177	14
2021	$133	10
2022	$991	78
2023	$1,383	108
2024	$1,390	109
2025	$1,438	113
2026	$1,477	116
2027	$1,500	118

Forecast: Visitor Volume

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

France: Visitation Forecast with Recovery Index to 2019   ■ Visitation (thousands)   ■ Recovery Index to 2019

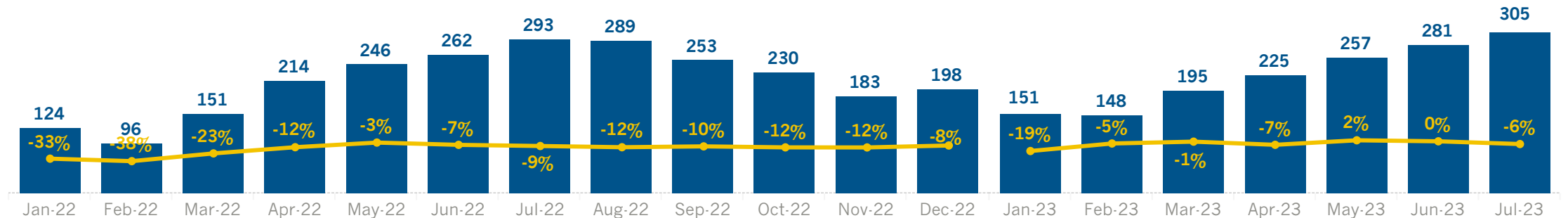| Year	Visitation (thousands)	Recovery Index to 2019
2019	510	
2020	79	16
2021	58	11
2022	360	71
2023	496	97
2024	512	100
2025	529	104
2026	538	106
2027	551	108

Airlift to California

The charts below shows airlift to California and percent change to 2019 for the focus market.
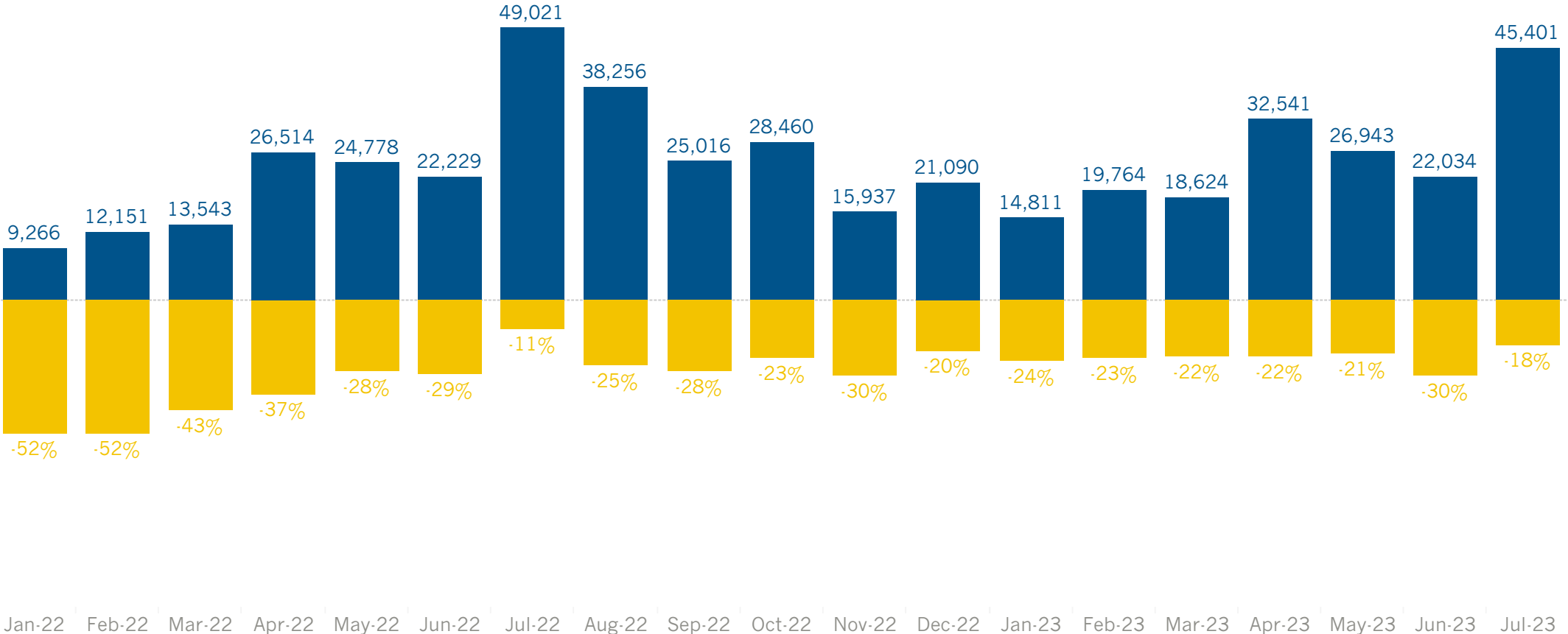
France: Non-Stop Seats to CA (% chg vs 2019)

Month	Seats	% chg
Jan-22	37,611	-40%
Feb-22	28,961	-45%
Mar-22	45,099	-31%
Apr-22	63,992	-23%
May-22	75,288	-18%
Jun-22	81,516	-19%
Jul-22	90,297	-22%
Aug-22	88,949	-24%
Sep-22	78,037	-18%
Oct-22	70,285	-18%
Nov-22	55,339	-20%
Dec-22	60,144	-16%
Jan-23	47,091	-25%
Feb-23	45,460	-13%
Mar-23	60,329	-8%
Apr-23	70,034	-16%
May-23	79,156	-13%
Jun-23	88,279	-12%
Jul-23	96,556	-16%
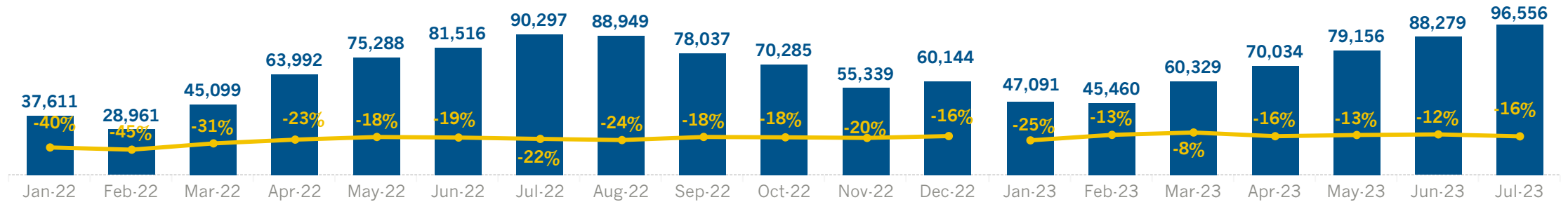
France: Non-Stop Flights to CA (% chg vs 2019)

Month	Flights	% chg
Jan-22	124	-33%
Feb-22	96	-38%
Mar-22	151	-23%
Apr-22	214	-12%
May-22	246	-3%
Jun-22	262	-7%
Jul-22	293	-9%
Aug-22	289	-12%
Sep-22	253	-10%
Oct-22	230	-12%
Nov-22	183	-12%
Dec-22	198	-8%
Jan-23	151	-19%
Feb-23	148	-5%
Mar-23	195	-1%
Apr-23	225	-7%
May-23	257	2%
Jun-23	281	0%
Jul-23	305	-6%

Source: Cirium

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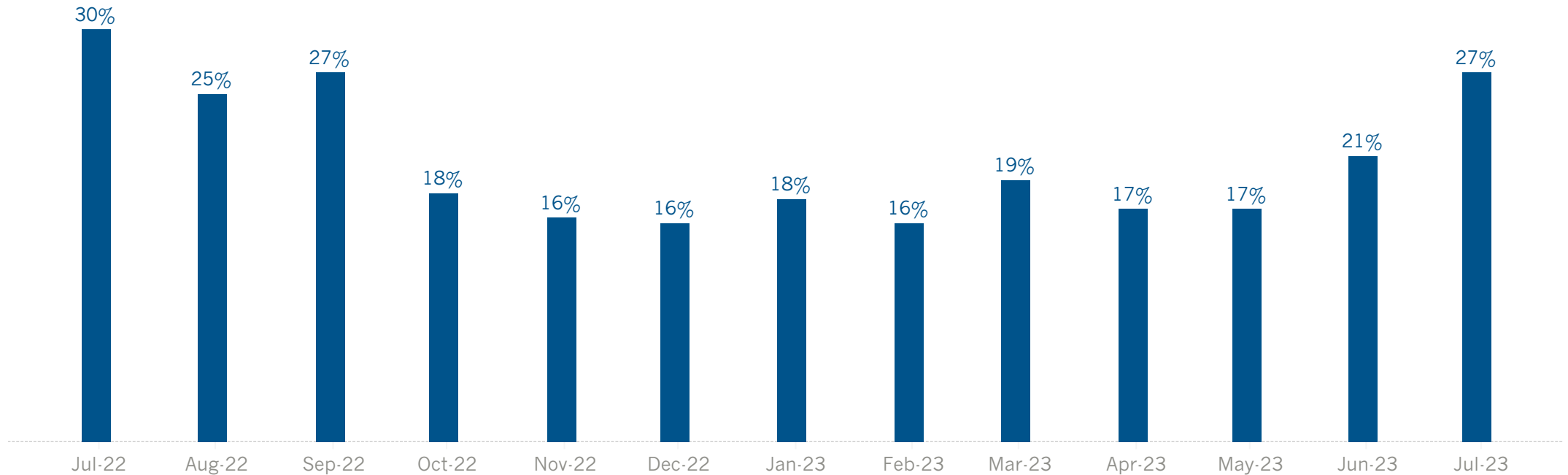
France: Non-Resident Arrivals at CA Ports of Entry (% change vs. 2019)

Month	Arrivals	% change vs. 2019
Jan-22	9,266	-52%
Feb-22	12,151	-52%
Mar-22	13,543	-43%
Apr-22	26,514	-37%
May-22	24,778	-28%
Jun-22	22,229	-29%
Jul-22	49,021	-11%
Aug-22	38,256	-25%
Sep-22	25,016	-28%
Oct-22	28,460	-23%
Nov-22	15,937	-30%
Dec-22	21,090	-20%
Jan-23	14,811	-24%
Feb-23	19,764	-23%
Mar-23	18,624	-22%
Apr-23	32,541	-22%
May-23	26,943	-21%
Jun-23	22,034	-30%
Jul-23	45,401	-18%

California's Share of Arrivals

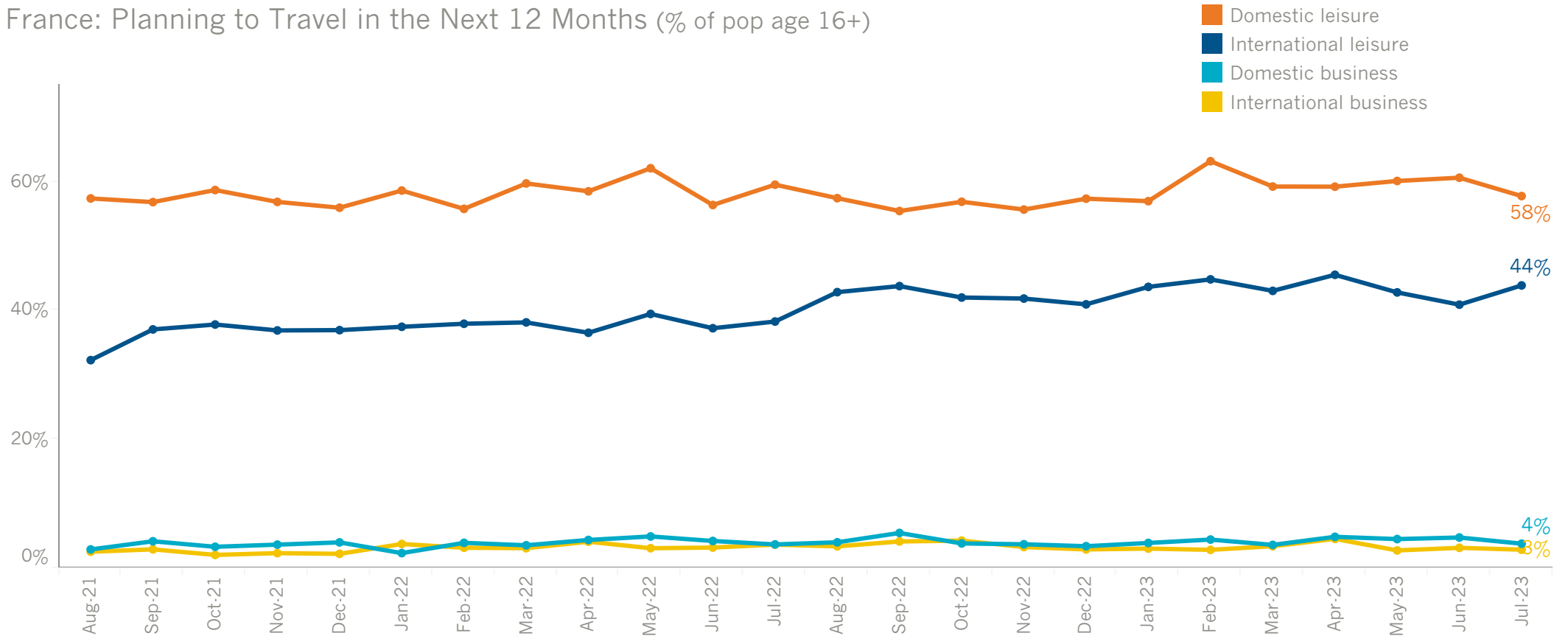The chart below shows California's share of arrivals from the focus market based on First Intended Address (FIA).

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

Jul-22	Aug-22	Sep-22	Oct-22	Nov-22	Dec-22	Jan-23	Feb-23	Mar-23	Apr-23	May-23	Jun-23	Jul-23
30%	25%	27%	18%	16%	16%	18%	16%	19%	17%	17%	21%	27%

Travel Planned in Next 12 Months

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

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

- Domestic leisure
- International leisure
- Domestic business
- International business

58%
44%
4%
3%

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.

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

Legend:
- Health risks
- Travel restrictions
- Safety
- Price of travel

Price of travel: 47%
Safety: 13%
Health risks: 5%
Travel restrictions: 5%
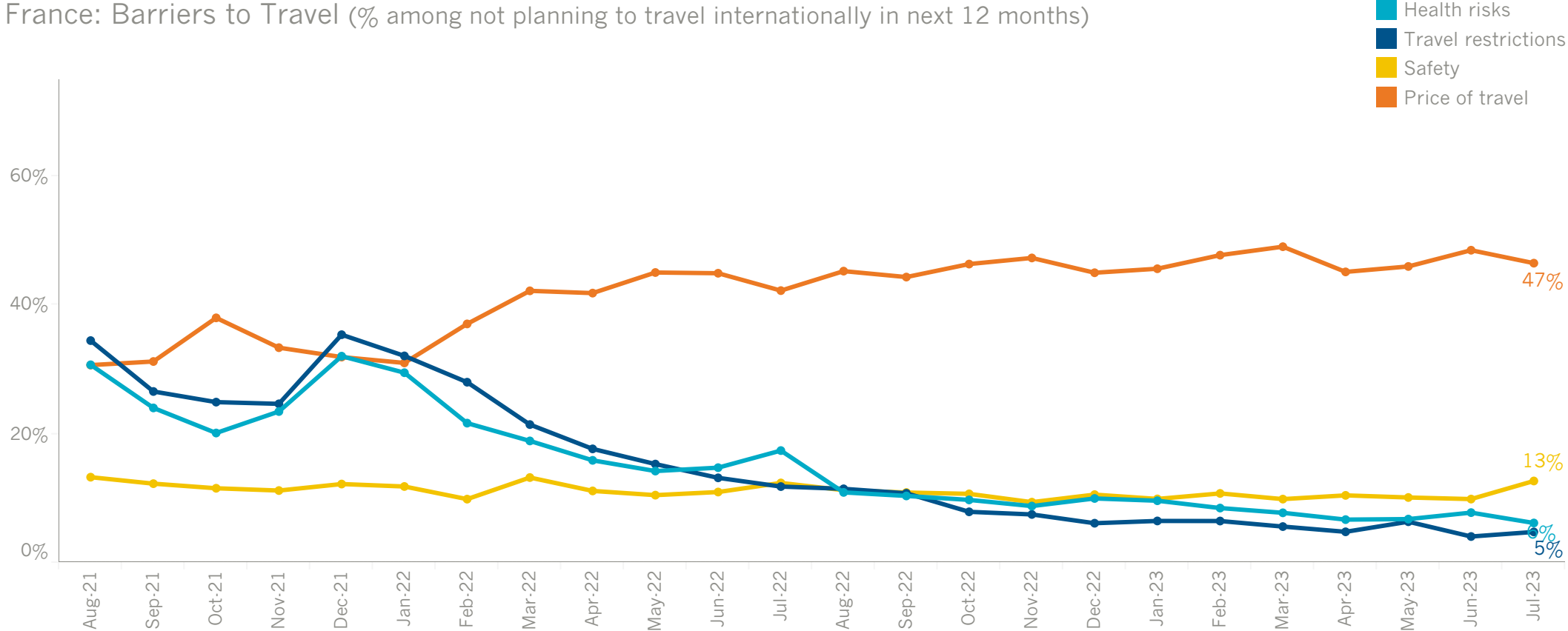
Q: Which, if any, of the below factors are currently preventing you from traveling?
Data reported for: July 2023

Audience Insights

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.
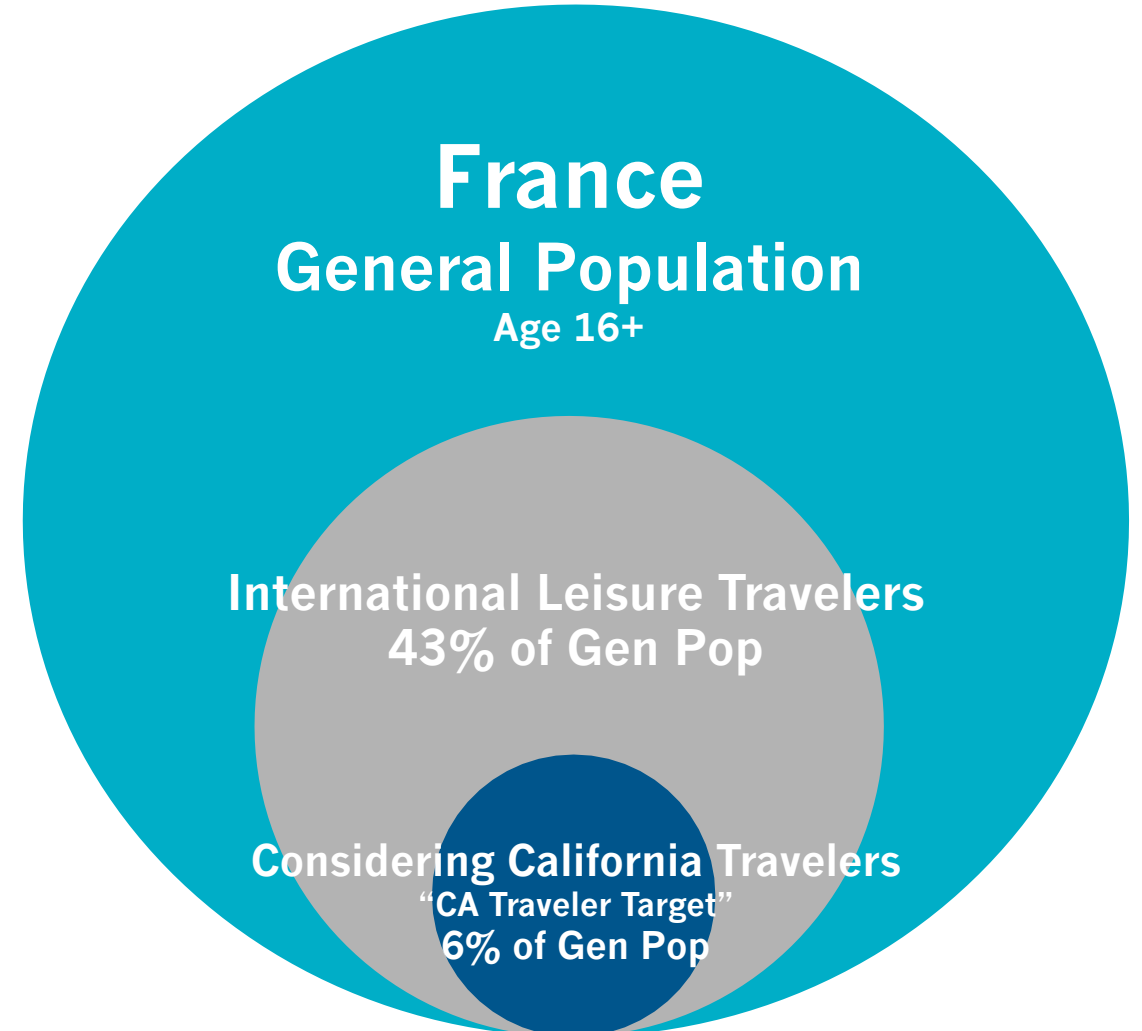
Definitions:

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.

France
General Population
Age 16+

International Leisure Travelers
43% of Gen Pop

Considering California Travelers
"CA Traveler Target"
6% of Gen Pop

Source: YouGov (July 2022-June 2023)

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, and 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.

France

Gender

	CA Traveler Target	Index
Female	48%	95
Male	52%	105

Marital Status

	CA Traveler Target	Index
Single	27%	134
Married	37%	94

Family Status

	CA Traveler Target	Index
Children <18	18%	68

Age

	CA Traveler Target	Index
Age 16-24	14%	118
Age 25-34	18%	101
Age 35-44	16%	103
Age 45-54	17%	103
Age 55+	34%	91

Generation

	CA Traveler Target	Index
Gen Z	10%	115
Millennial	32%	100
Gen X	31%	110
Baby Boomer	26%	87
Silent	1%	88

Income*

	CA Traveler Target	Index
Higher income	18%	130
Middle income	50%	93
Lower income	17%	88
Prefer not to say	15%	115

Region

	CA Traveler Target	Index
Sud-Est	29%	111
Region Parisienne	28%	117
Nord-Est	20%	90
Nord-Ouest	14%	81
Sud-Ouest	9%	85

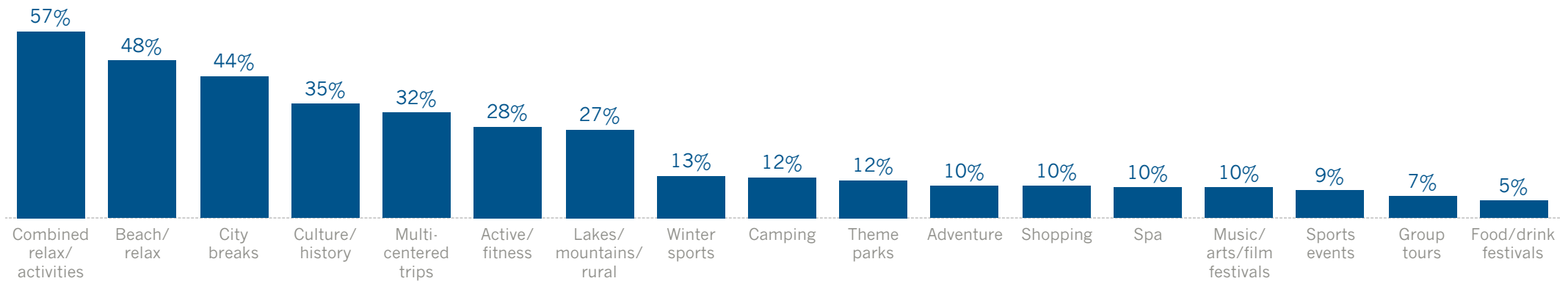*Income definitions: Higher >200% of median, Middle 75% to 200% of median, Lower <75% of median

Trip Preferences/Characteristics

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

France

Trip Type

Trip Type	%
Combined relax/activities	57%
Beach/relax	48%
City breaks	44%
Culture/history	35%
Multi-centered trips	32%
Active/fitness	28%
Lakes/mountains/rural	27%
Winter sports	13%
Camping	12%
Theme parks	12%
Adventure	10%
Shopping	10%
Spa	10%
Music/arts/film festivals	10%
Sports events	9%
Group tours	7%
Food/drink festivals	5%

Traveler Type

	CA Traveler Target	Index
Budget	42%	98
Adventurous	14%	114
Responsible	14%	112
All-inclusive	11%	100
Luxury	6%	94

Travel Party (from most recent vacation)

	CA Traveler Target	Index
My partner	65%	97
My children	33%	93
Friend(s)	24%	122
Other family	21%	112
Solo	5%	92
Other person(s)	4%	167

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?
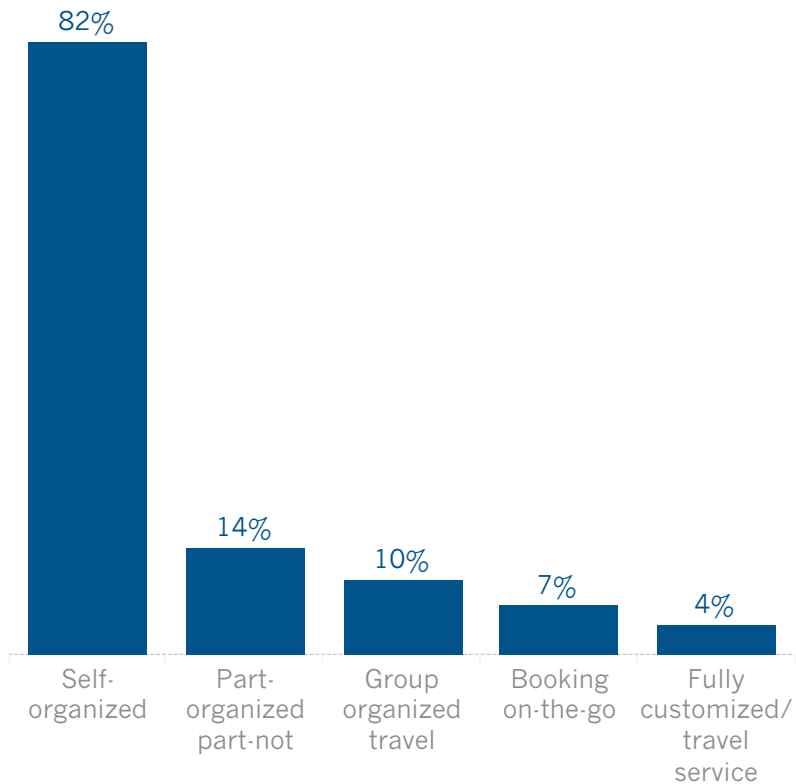
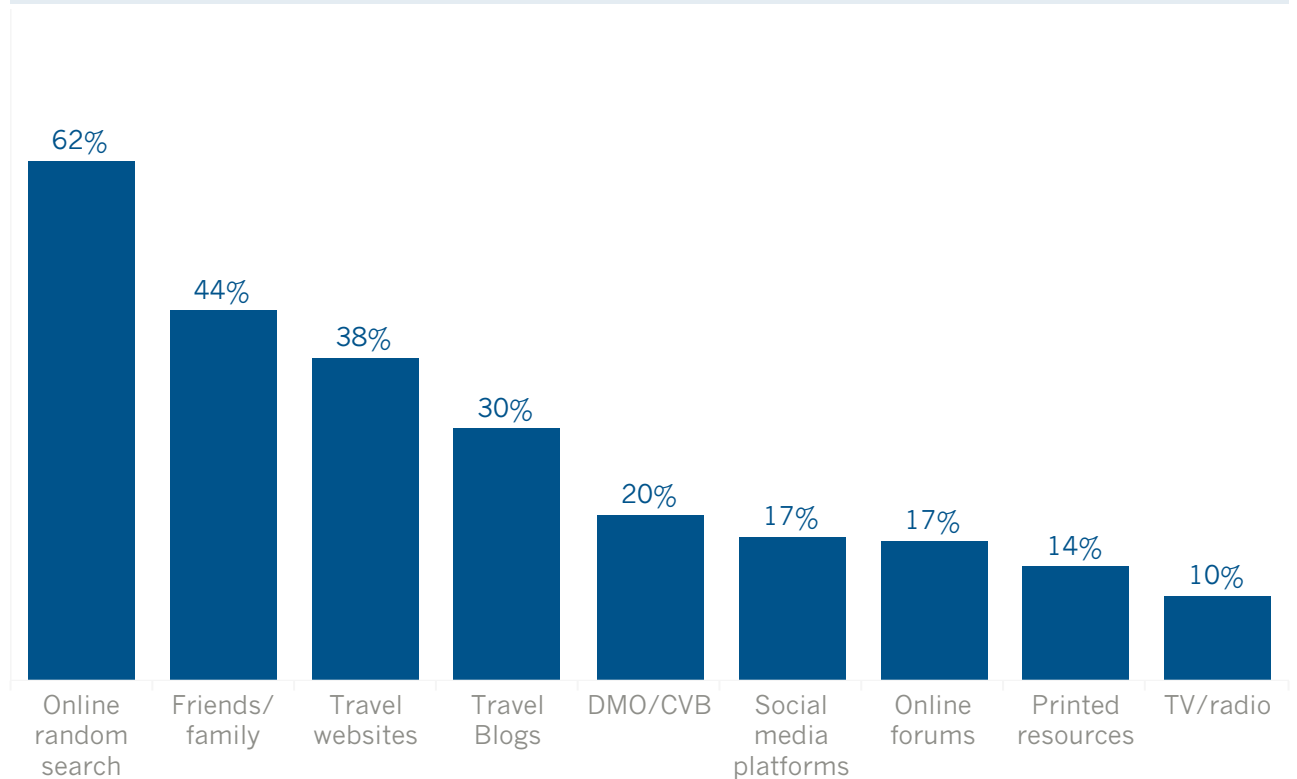Source: YouGov (July 2022-June 2023)

Organizing/Planning Methods

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

France

Organizing Travel

- Self-organized: 82%
- Part-organized part-not: 14%
- Group organized travel: 10%
- Booking on-the-go: 7%
- Fully customized/ travel service: 4%

Planning Methods

- Online random search: 62%
- Friends/ family: 44%
- Travel websites: 38%
- Travel Blogs: 30%
- DMO/CVB: 20%
- Social media platforms: 17%
- Online forums: 17%
- Printed resources: 14%
- TV/radio: 10%

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?
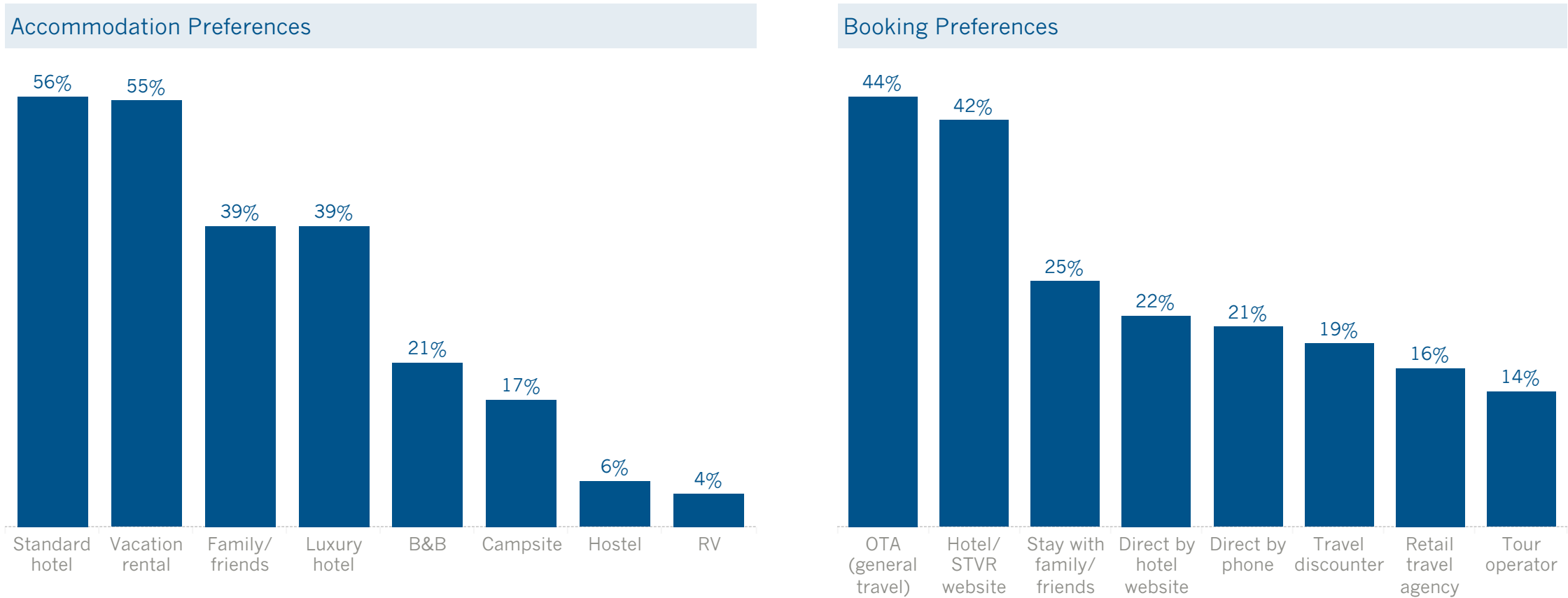
Source: YouGov (July 2022-June 2023)

Booking Preferences

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

France

Accommodation Preferences

Standard hotel: 56%
Vacation rental: 55%
Family/friends: 39%
Luxury hotel: 39%
B&B: 21%
Campsite: 17%
Hostel: 6%
RV: 4%

Booking Preferences

OTA (general travel): 44%
Hotel/STVR website: 42%
Stay with family/friends: 25%
Direct by hotel website: 22%
Direct by phone: 21%
Travel discounter: 19%
Retail travel agency: 16%
Tour operator: 14%

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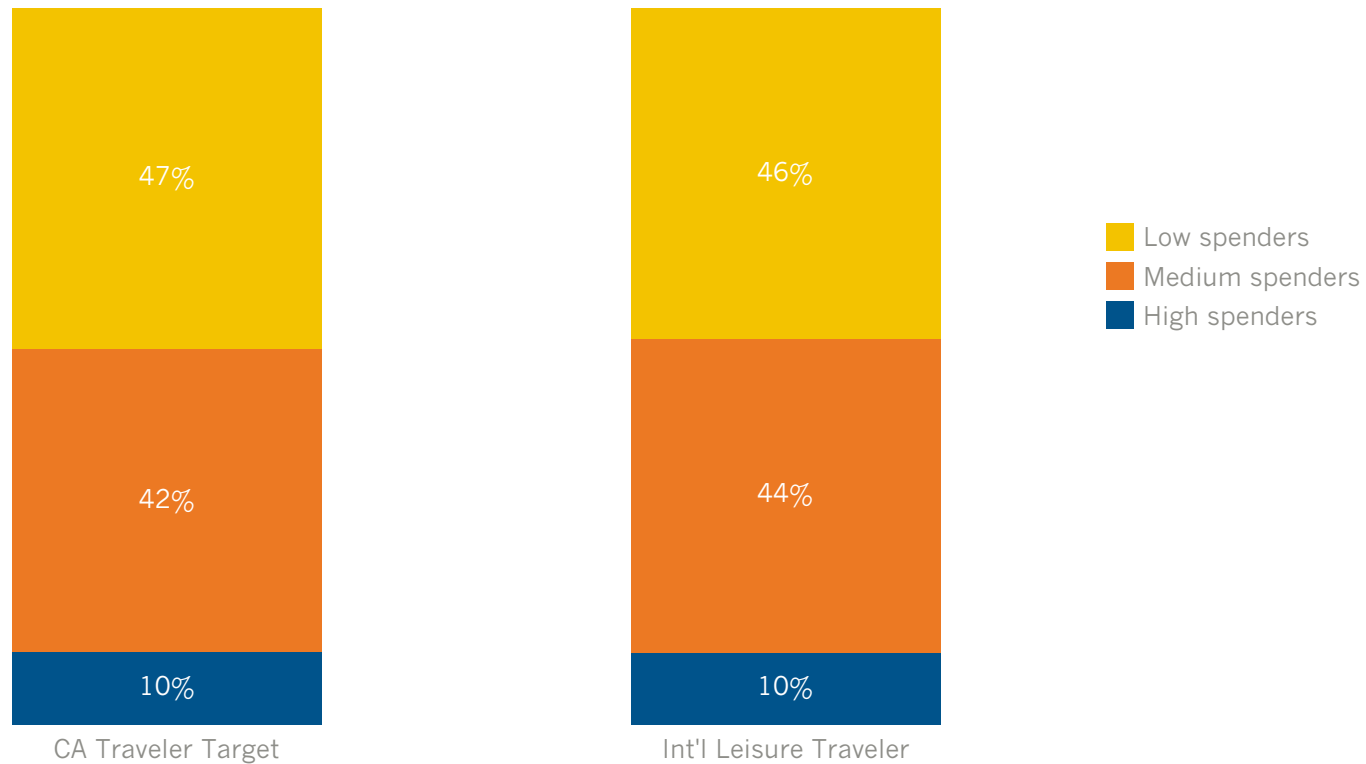Q Booking: Which of the following booking methods do you typically use when booking accommodations for the holidays?

Source: YouGov (July 2022-June 2023)

Travel Spending

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

France

Travel Spending (from most recent vacation)

CA Traveler Target
- Low spenders: 47%
- Medium spenders: 42%
- High spenders: 10%

Int'l Leisure Traveler
- Low spenders: 46%
- Medium spenders: 44%
- High spenders: 10%

Legend:
- Low spenders
- Medium spenders
- High spenders

Q: Thinking about your most recent holiday, approximately how much in total was spent per person?

Media & Advertising

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

France

Advertising Influences

	CA Traveler Target	Index
Travel websites	49%	111
Social media	47%	122
TV - Free to view channels	45%	139
Billboards	41%	139
Magazines (digital)	27%	140
Cinema	25%	129
Magazines (physical)	23%	129
Radio	23%	130
Public transport	24%	176
Local newspaper (digital)	20%	136
National newspaper (digital)	21%	171
Local newspaper (physical)	17%	107
Online streaming services	18%	132
National newspaper (physical)	16%	166
TV - paid/subscription	14%	140
Direct mail	11%	93
Podcast	11%	154

Sports Watched/Followed

	CA Traveler Target	Index
Soccer/Football	34%	113
Tennis	31%	129
Athletics/Track & Field	23%	135
Cycling	20%	110
Swimming	20%	151
Basketball	18%	147
Gymnastics	11%	130
Boxing	10%	126
Running/Marathon	10%	153
Volleyball	8%	129
Rugby League	8%	164
NFL	7%	200
Ice Hockey	7%	224
Golf	6%	161
Surfing	5%	149
Horse Racing	3%	96
Baseball	4%	177
Australian Rules Football	3%	273
Cricket	1%	131

Q Advertising: Thinking about your next travel or holiday related purchase,...where would you advertise to catch your attention?
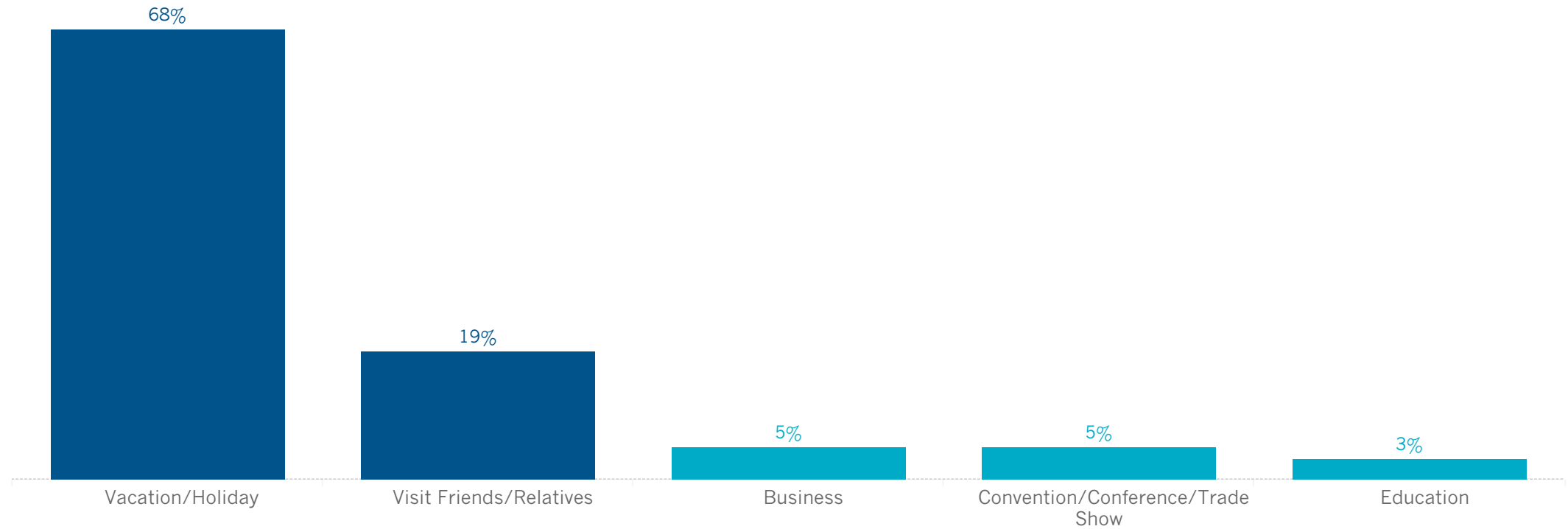Q Sports: Which of the following sports do you watch or follow?

California Travelers &
California Trip Characteristics

Main Purpose of Trip

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

France

Main Purpose of Trip

- Vacation/Holiday — 68%
- Visit Friends/Relatives — 19%
- Business — 5%
- Convention/Conference/Trade Show — 5%
- Education — 3%

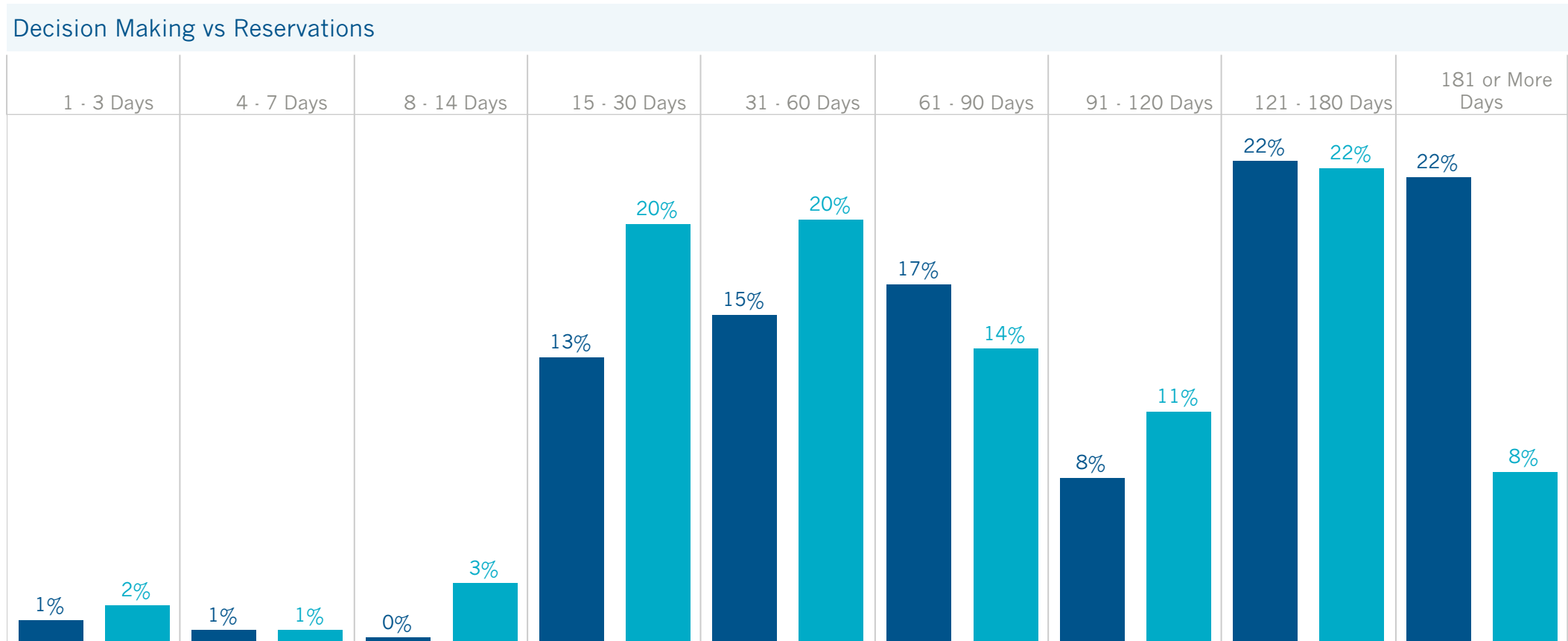Q. What was the main purpose of your trip?

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..

Leisure travelers

France

Decision Making vs Reservations

	1 - 3 Days	4 - 7 Days	8 - 14 Days	15 - 30 Days	31 - 60 Days	61 - 90 Days	91 - 120 Days	121 - 180 Days	181 or More Days
Decision	1%	1%	0%	13%	15%	17%	8%	22%	22%
Reservations	2%	1%	3%	20%	20%	14%	11%	22%	8%

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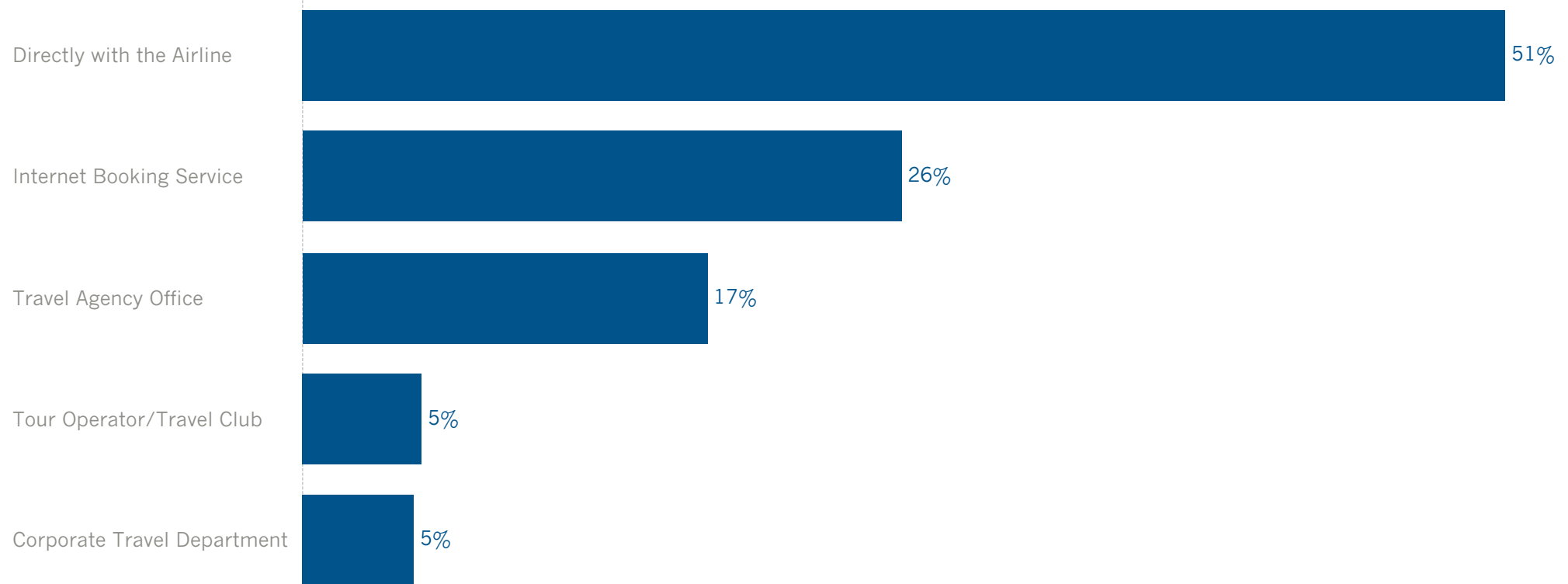■ How many days prior to departure did you make air travel reservations?

Airline Reservations

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

Leisure travelers

France

Airline Reservations

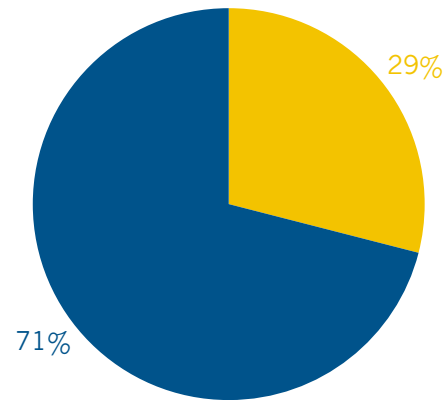|	
Directly with the Airline	51%
Internet Booking Service	26%
Travel Agency Office	17%
Tour Operator/Travel Club	5%
Corporate Travel Department	5%

First/Repeat Visitation, Travel Party Size
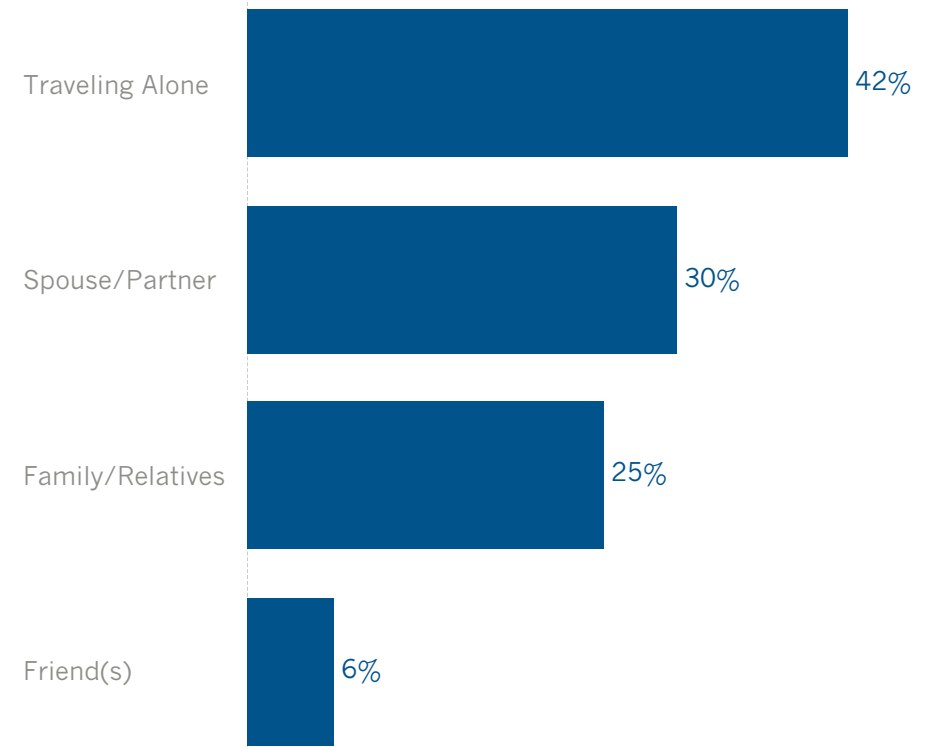
The charts below show first-time and repeat visitation and travel party size among travelers from the focus market.

France

First trip to the US

29%

71%

- Yes
- No

Travel Companion

Traveling Alone — 42%

Spouse/Partner — 30%

Family/Relatives — 25%

Friend(s) — 6%

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

Leisure travelers

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.

France

Types of Accommodations

- Hotel or Motel, etc. — 76%
- Private Home — 27%
- Other — 12%

Nights in Destination

- 4-7 Nights — 37%
- 8-14 Nights — 32%
- 15-30 Nights — 16%
- 2-3 Nights — 12%
- 31+ Nights — 3%
- 1 Night — 1%
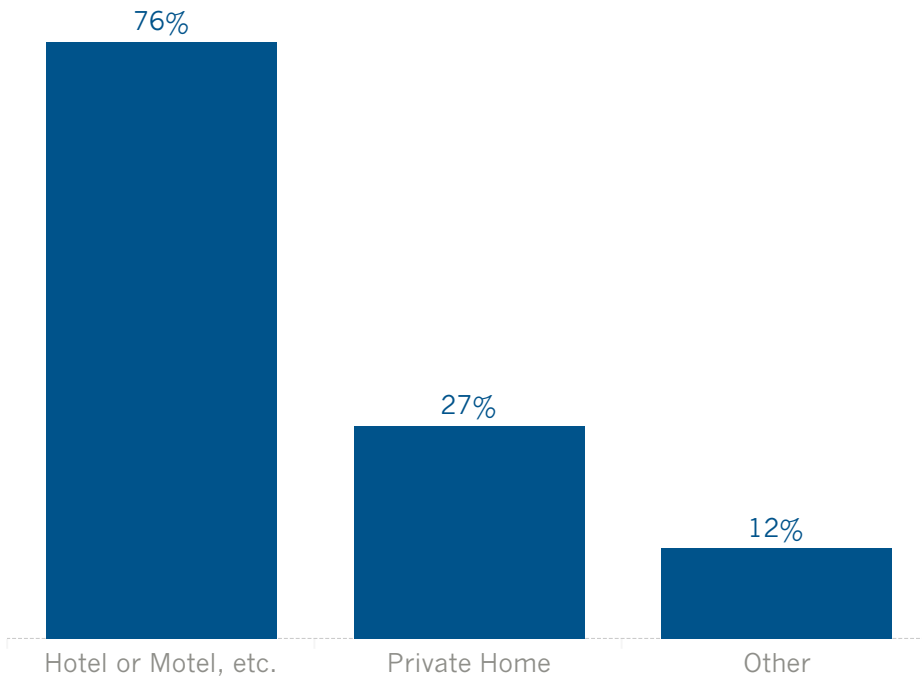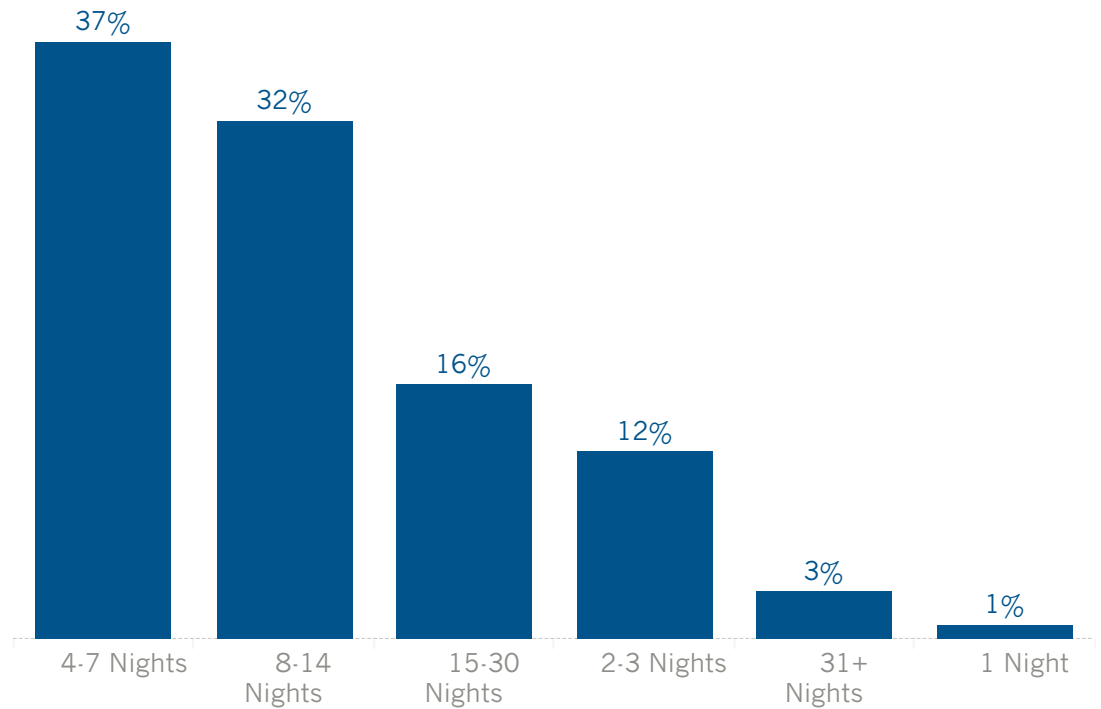
Q: Type of accomodations in the destination
Q: Overall nights in destination

Source: SIAT 2022

Destinations visited

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

France

US Destinations visited	
Los Angeles-Long Beach	72%
San Francisco	57%
Las Vegas	44%
Flagstaff-G.Cyn-Sedona	24%
New York City	10%
San Diego	9%
Riverside-San Bernardino	8%
Monterey-Salinas	6%

Q: What U.S. Destinations did you visit (include main destination)?

Source: SIAT 2022
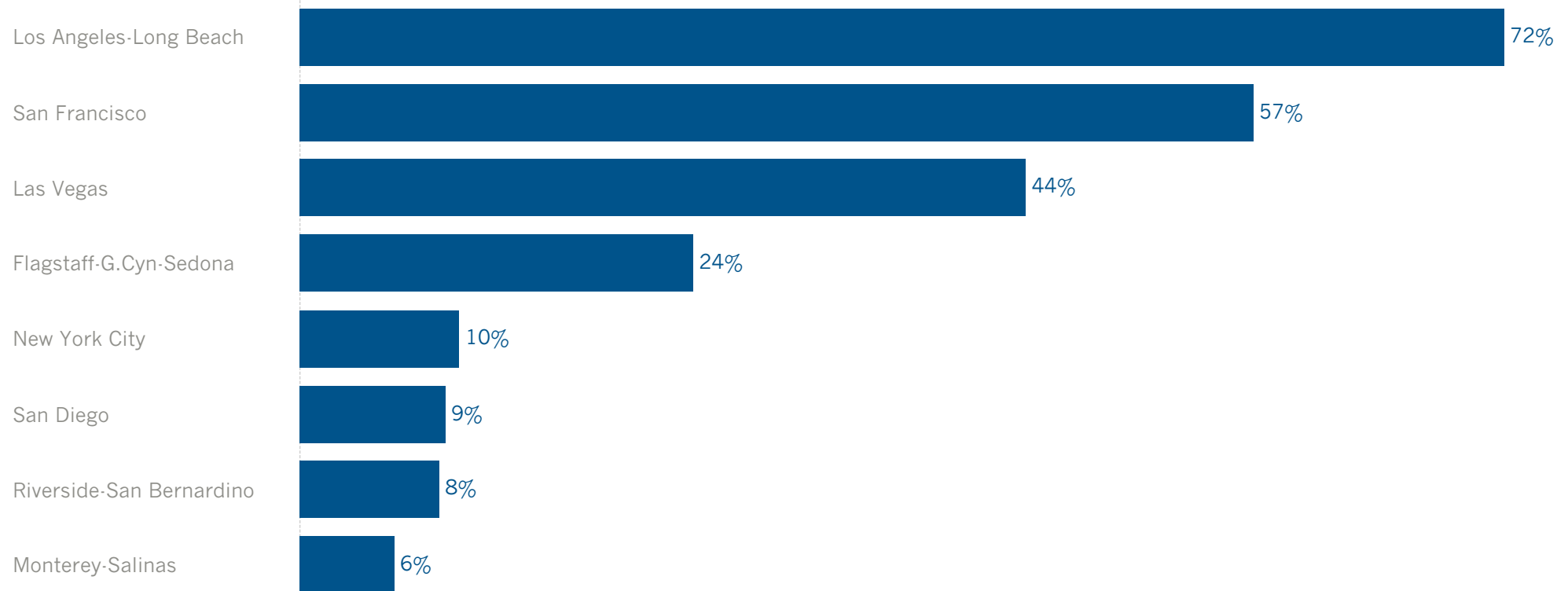
Transportation

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

France

Types of Transportation	
Rented Auto	55%
Auto, Private or Company	41%
City Subway/Tram/Bus	38%
Air Travel between U.S. Cities	25%
Ride-sharing Service	21%
Ferry/River Taxi/Srt Scenic Cruise	12%
Rented Bicycle/Motorcycle/Moped	12%
Taxicab/Limousine	12%
Bus between Cities	11%
Railroad between Cities	8%
Motor Home/Camper	3%
Cruise Ship/River Boat 1+ Nights	2%
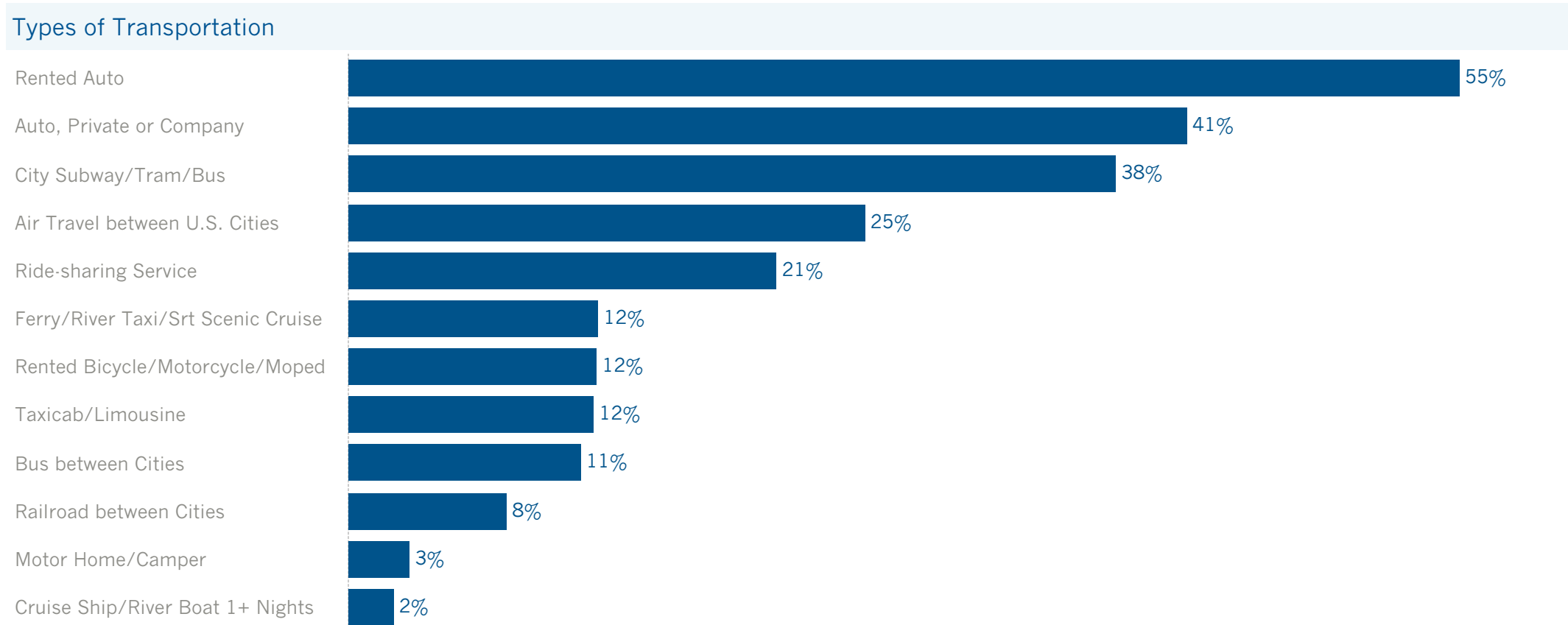
Activities

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

France

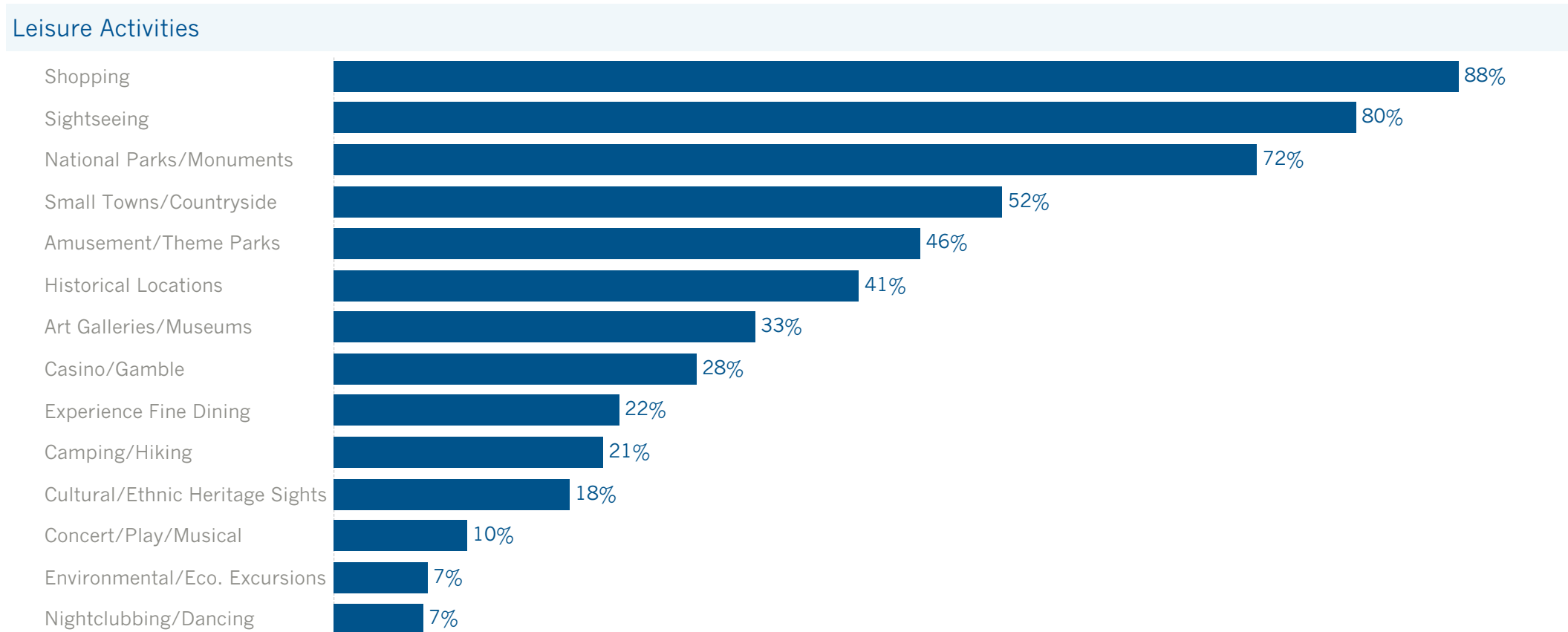| Leisure Activities	
Shopping	88%
Sightseeing	80%
National Parks/Monuments	72%
Small Towns/Countryside	52%
Amusement/Theme Parks	46%
Historical Locations	41%
Art Galleries/Museums	33%
Casino/Gamble	28%
Experience Fine Dining	22%
Camping/Hiking	21%
Cultural/Ethnic Heritage Sights	18%
Concert/Play/Musical	10%
Environmental/Eco. Excursions	7%
Nightclubbing/Dancing	7%

Q: Did anyone engage in any of the following leisure activities?

Source: SIAT 2022

Expenditures in the US

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

France

Expenditures per visitor	
International Airfare	$1,025
Accommodations/Lodging	$572
Food and Beverages	$474
Entertainment and Recreation	$342
Shopping, Gifts, and Other Purchases	$243
Ground Transportation	$208
Additional Air Transportation	$83

Q. Mean expenditures per visitor/trip

Source: SIAT 2022