

# Global Market Profile

INDIA



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

<b>Audience Profile of:</b> <i>International Leisure Travelers Considering CA</i>	<b>Audience Profile of:</b> <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

India



**POPULATION: \***

**1,428.6M**

**EXCHANGE RATE: \*\***

Local currency to USD dollar

**82.6**

**GROSS DOMESTIC PRODUCT (GDP):**

Annual % chg \*\*\*

**5.9%**

**INFLATION RATE:**

Annual % chg \*\*\*\*

**4.9%**

\* [www.worldometers.info](http://www.worldometers.info), 2023

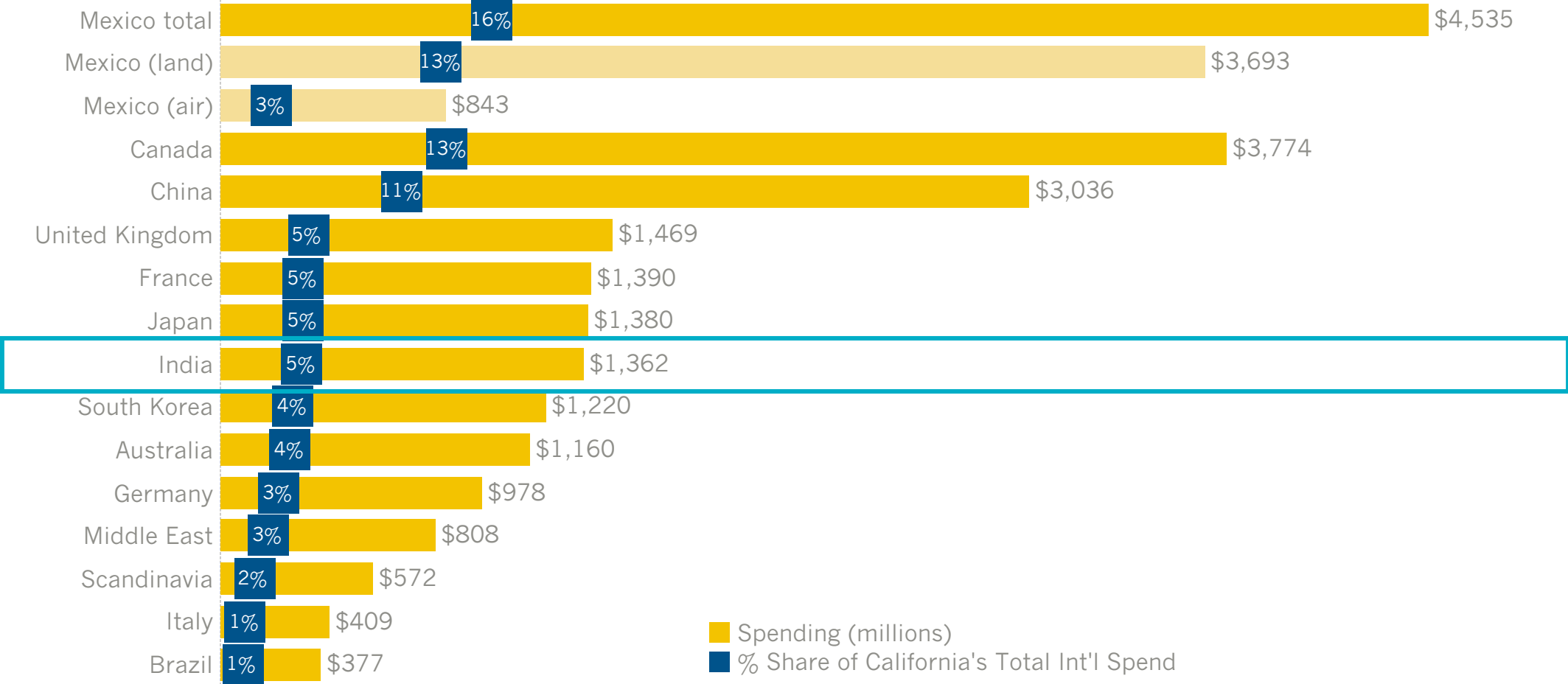
\*\* [www.x-rates.com](http://www.x-rates.com), Aug 2023

\*\*\* [www.imf.org](http://www.imf.org), 2023

\*\*\*\* [www.imf.org](http://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.



Source: Tourism Economics (Sept 2023)



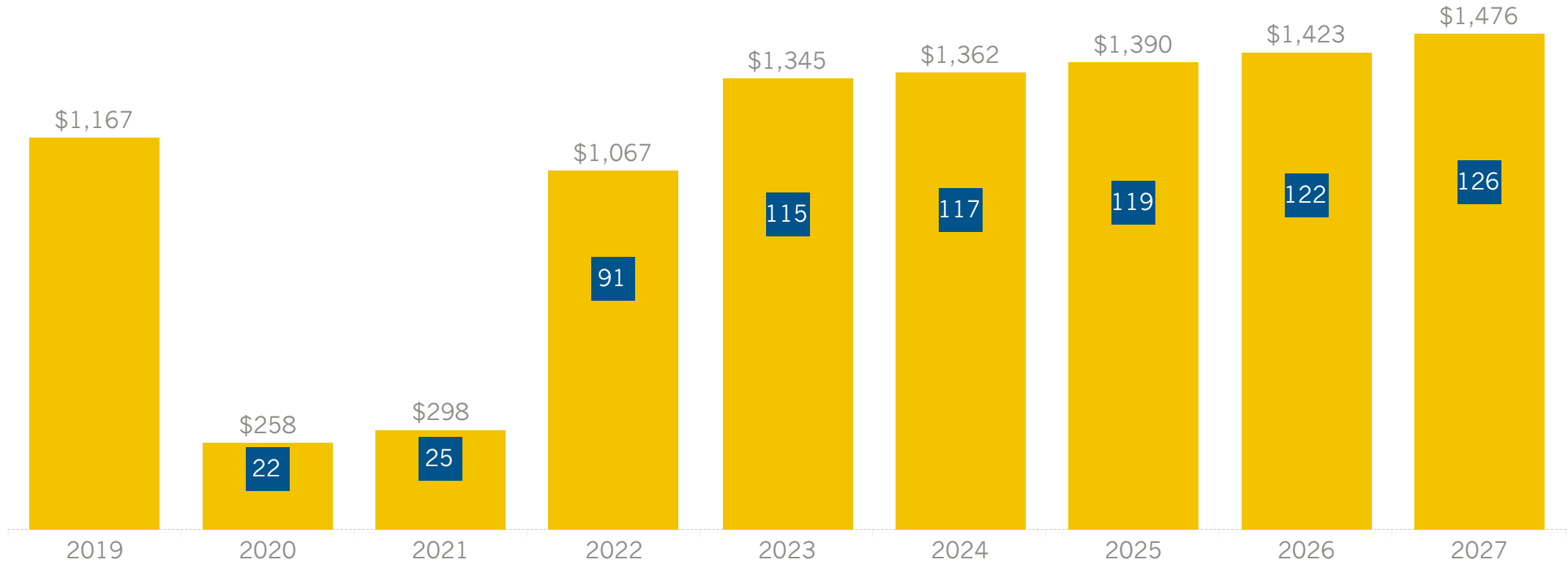
# Forecast: Visitor Spending

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

India: Visitor Spending Forecast with Recovery Index to 2019

■ Spending (millions)

■ Recovery Index to 2019



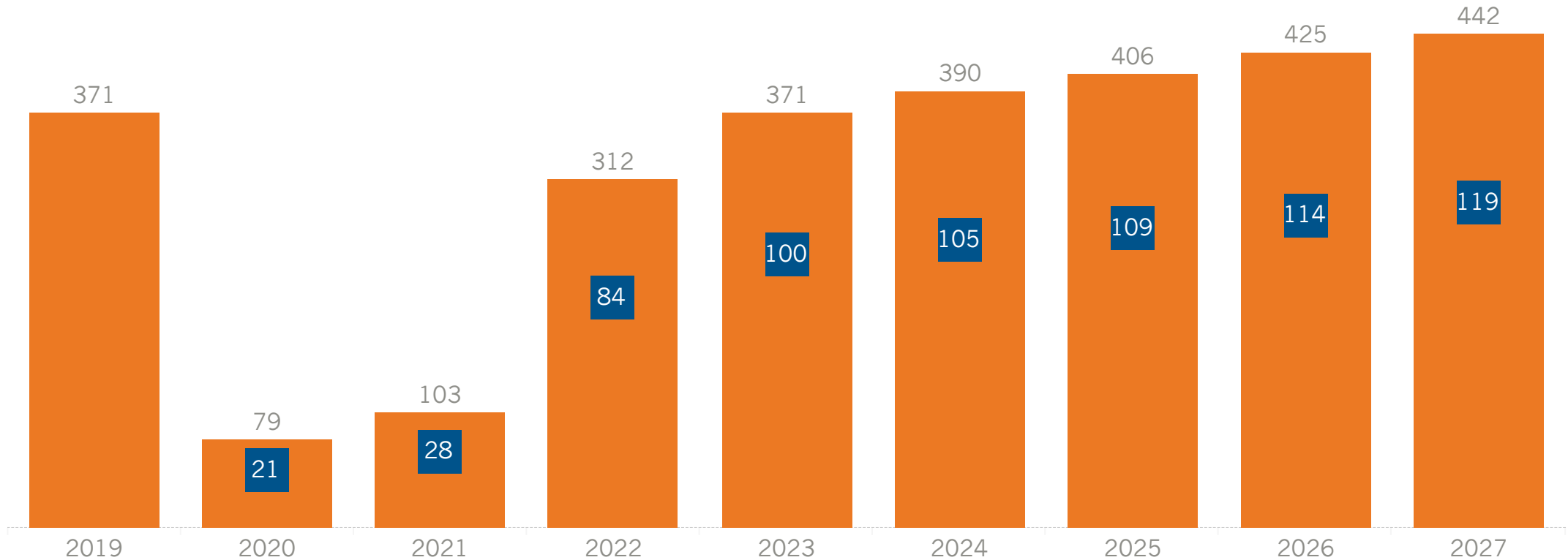
# Forecast: Visitor Volume

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

India: Visitation Forecast with Recovery Index to 2019

■ Visitation (thousands)

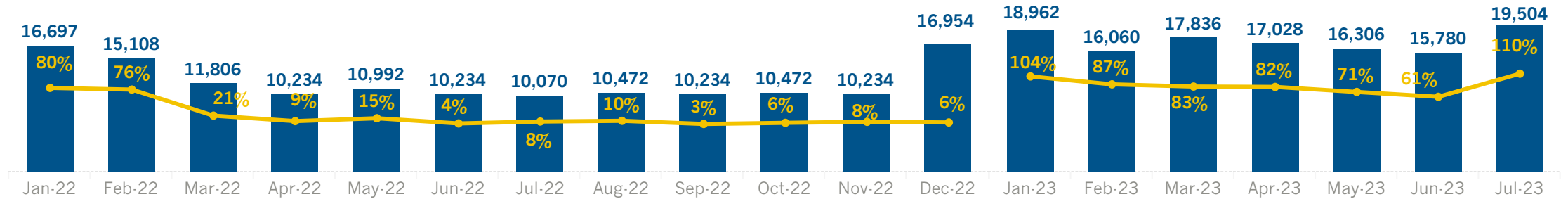
■ Recovery Index to 2019



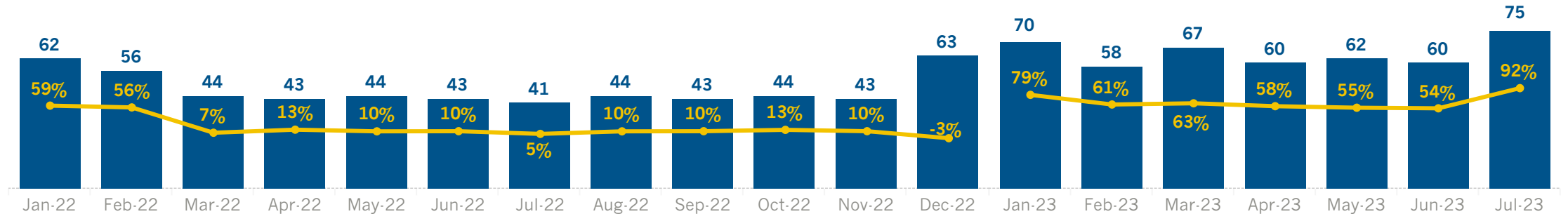
# Airlift to California

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

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



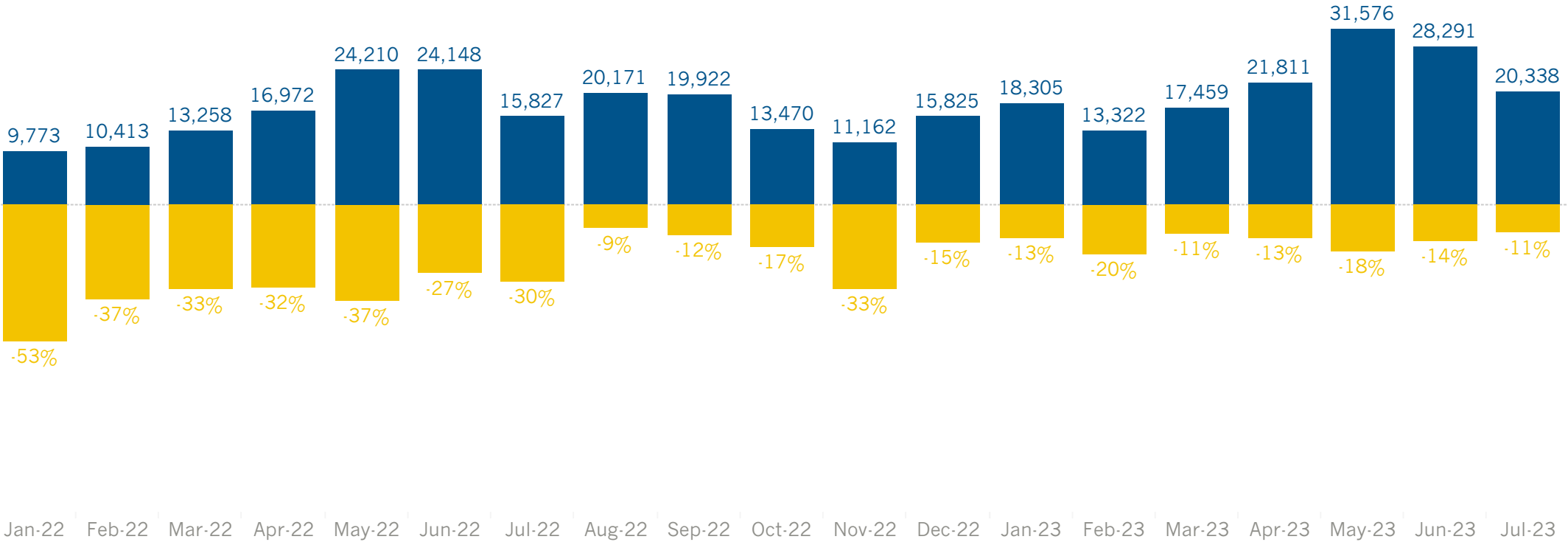
### India: Non-Stop Flights to CA (% chg vs 2019)



# 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.

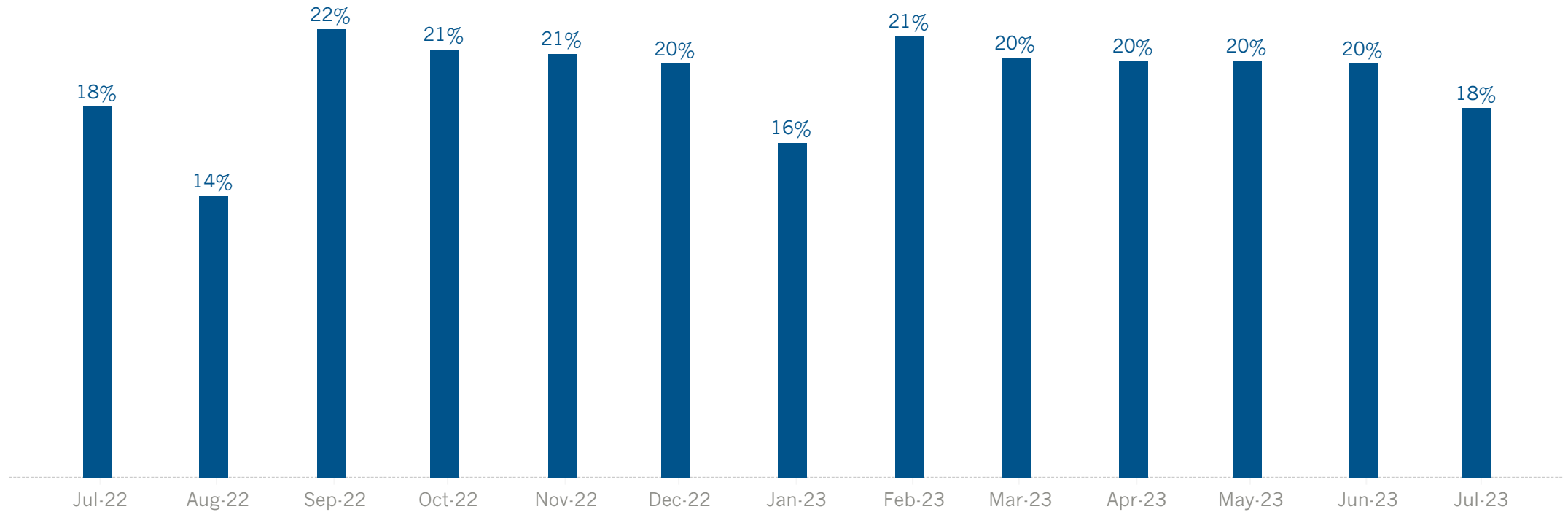
India: Non-Resident Arrivals at CA Ports of Entry (% change vs. 2019)



# California's Share of Arrivals

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

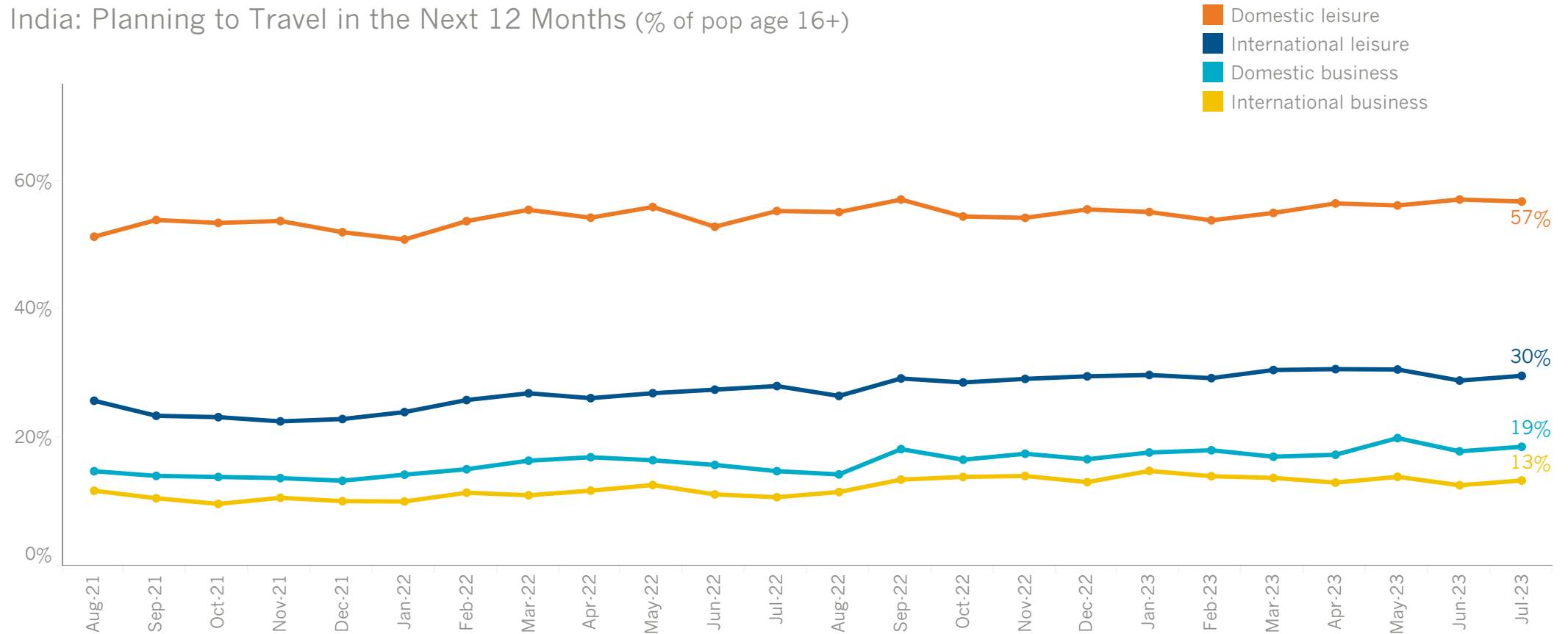
India: California Market Share of Arrivals Based on First Intended Address (%)



# Travel Planned in Next 12 Months

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

India: 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.

India: 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.

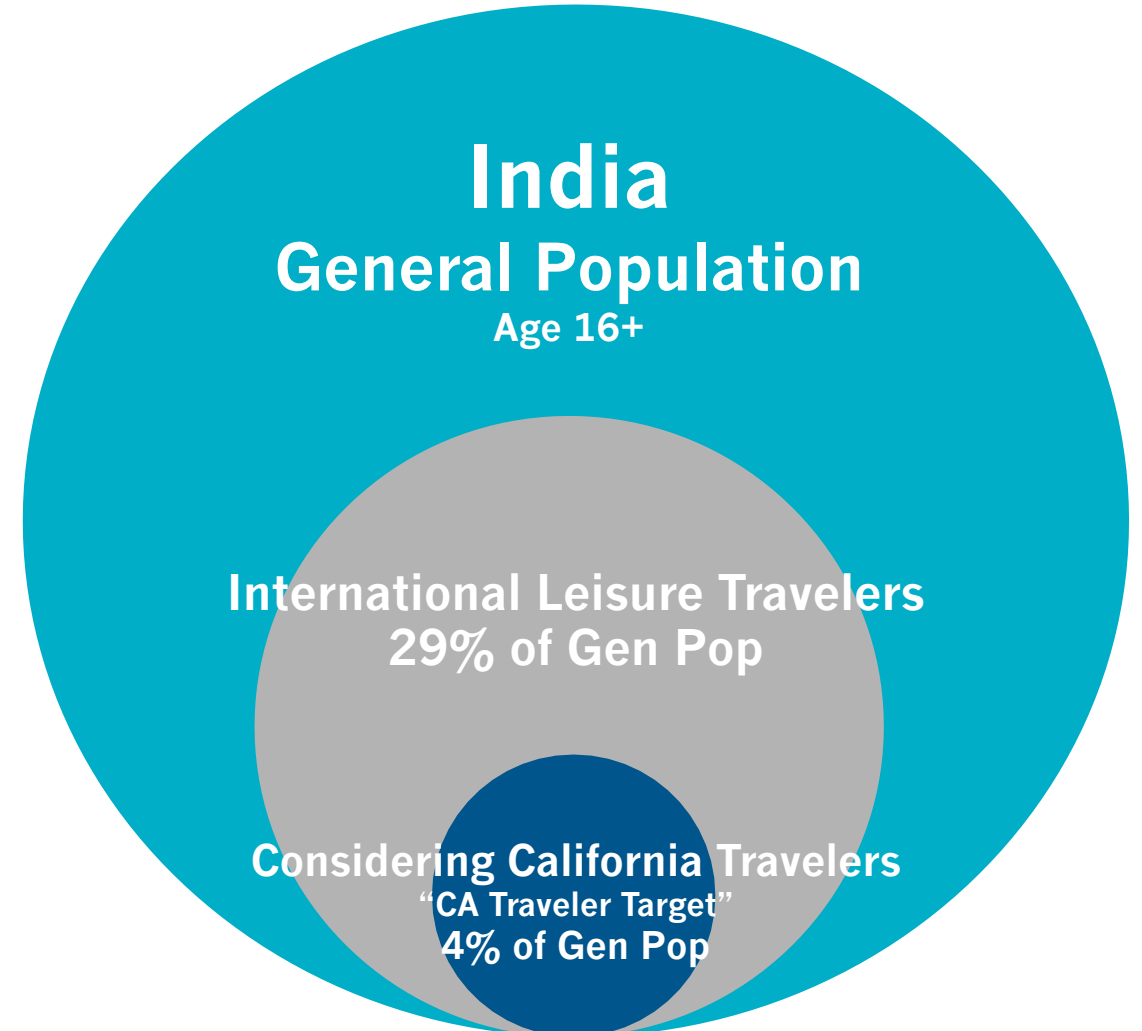
## Definitions:

### 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.

## India

Gender		
	CA Traveler Target	Index
Female	46%	95
Male	54%	105

Marital Status		
	CA Travel..	Index
Married no kids	7%	90
Married w/ kids	53%	99
Single	39%	106

Age		
	CA Traveler Target	Index
Age 16-24	13%	85
Age 25-34	24%	92
Age 35-44	27%	112
Age 45-54	26%	102
Age 55+	9%	112

Generation		
	CA Traveler Target	Index
Gen Z	11%	94
Millennial	45%	93
Gen X	39%	113
Baby Boomer	5%	92
Silent	0%	150

Income*		
	CA Traveler Target	Index
Higher income	45%	132
Middle income	36%	94
Lower income	16%	64
Prefer not to say	4%	108

Region		
	CA Traveler Target	Index
West Bengal	14%	119
Maharashtra	13%	93
Delhi	11%	113
Uttar Pradesh	10%	109
Karnataka	7%	125
Kerala	6%	70
Tamil Nadu	5%	97
Rajasthan	5%	107
Gujarat	5%	94

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



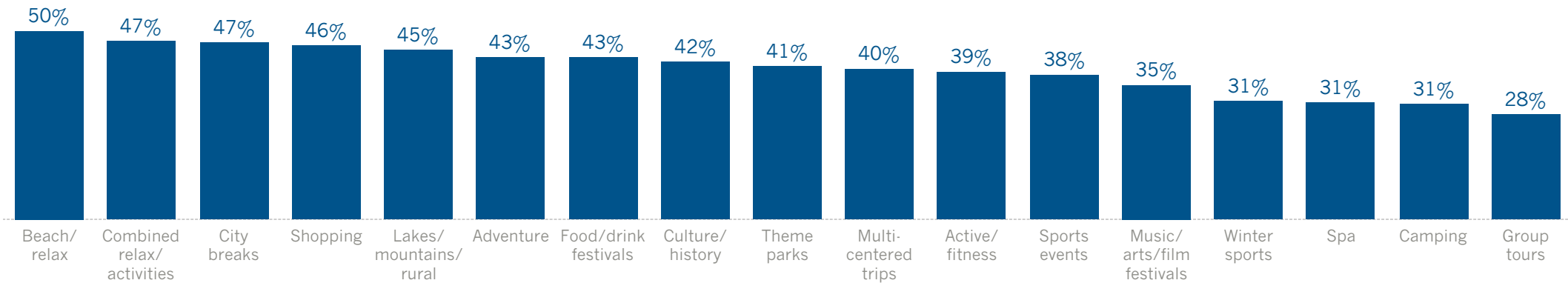
Int'l leisure travelers  
considering California  
"CA Traveler Target"

# Trip Preferences/Characteristics

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

## India

### Trip Type



### Traveler Type

	CA Traveler Target	Index
Budget	36%	91
Luxury	24%	126
Adventurous	14%	126
Responsible	14%	88
All-inclusive	6%	87

### Travel Party (from most recent vacation)

	CA Traveler Target	Index
My partner	70%	115
My children	55%	114
Other family	43%	129
Friend(s)	42%	113
Other person(s)	14%	141
Solo	3%	89

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)



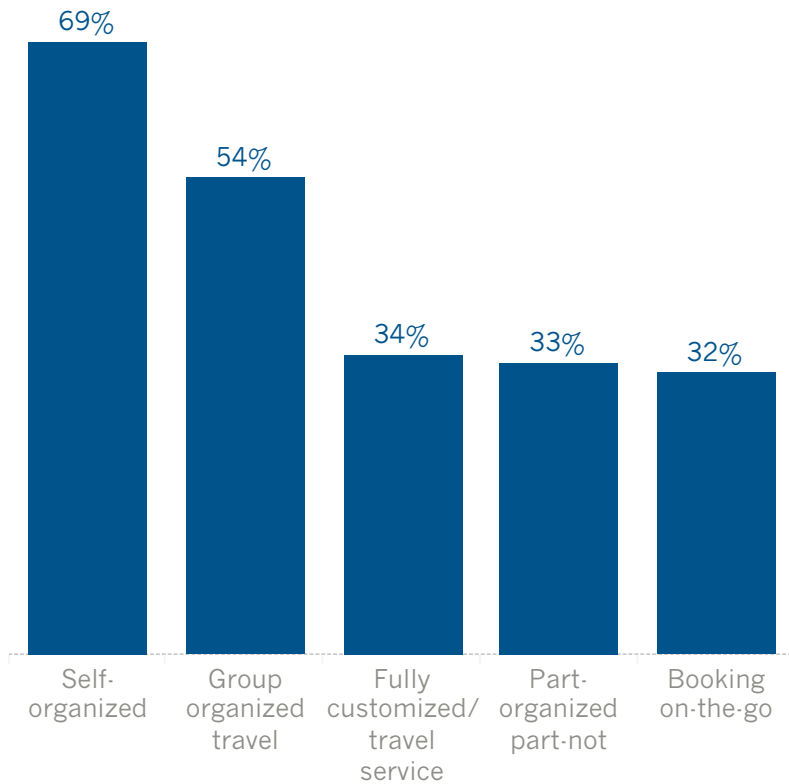
Int'l leisure travelers  
considering California  
"CA Traveler Target"

# Organizing/Planning Methods

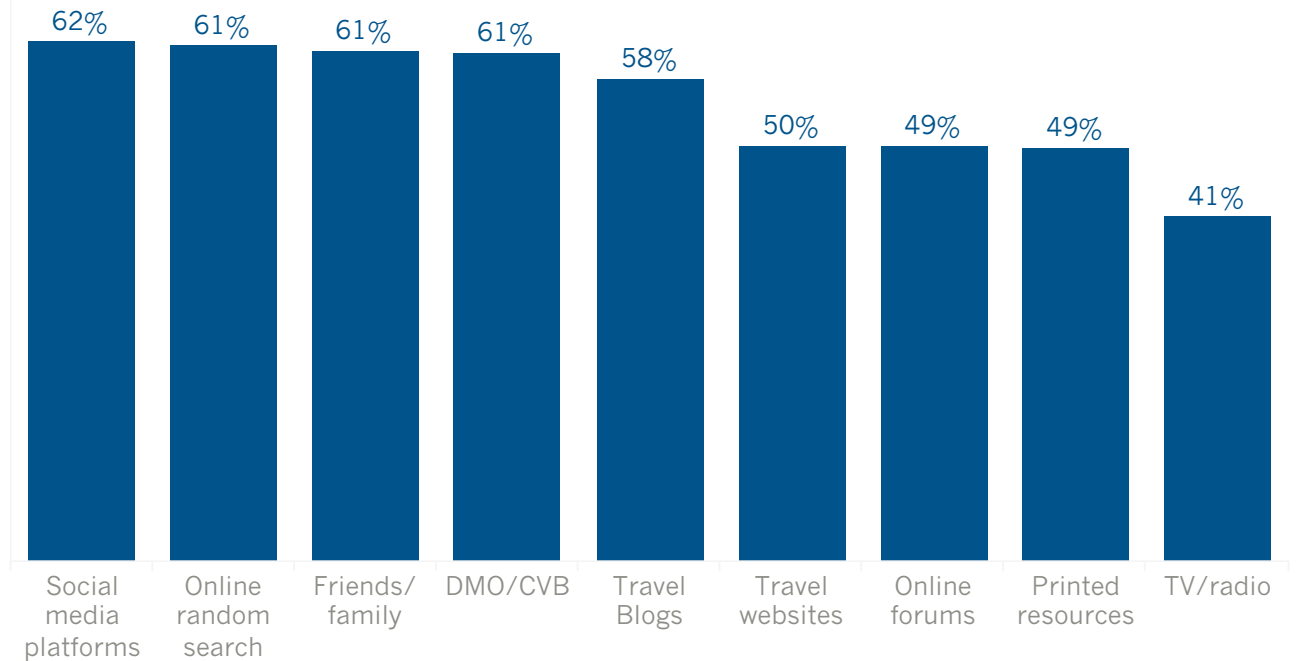
The chart below shows the organizing and planning methods of of the consumer target in the focus market.

## India

### 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)

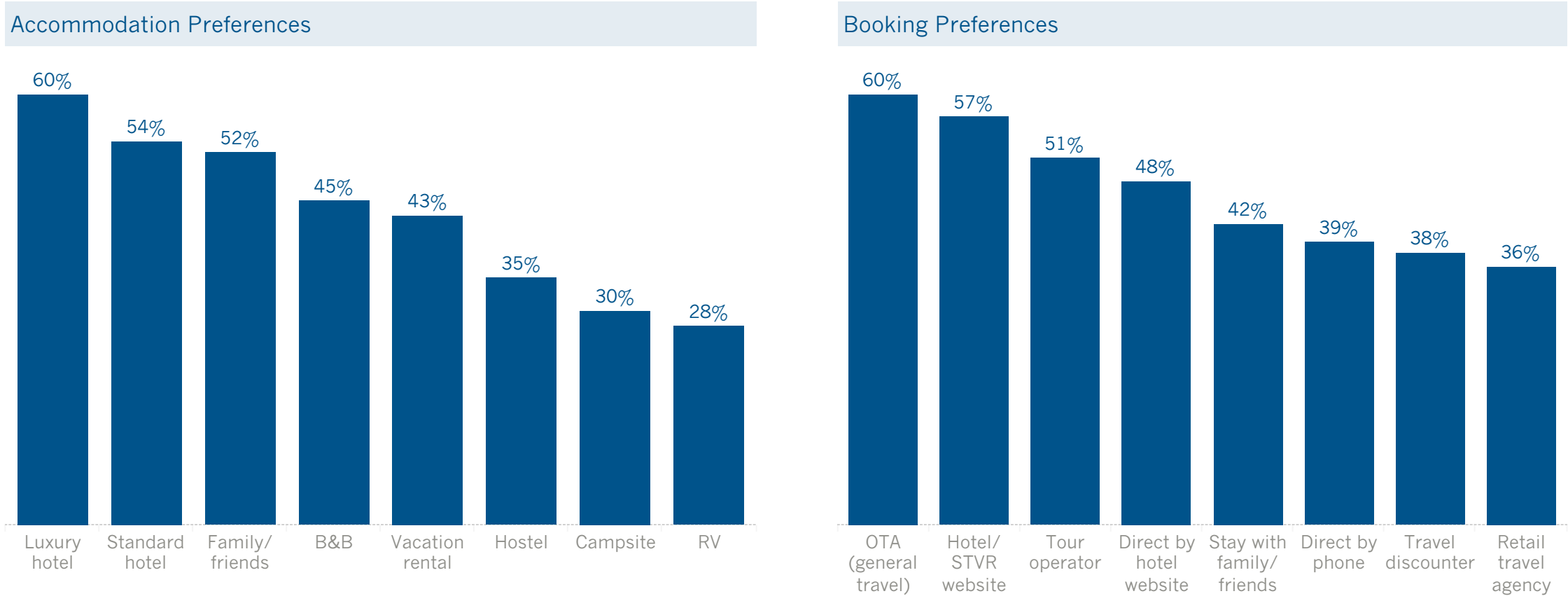


Int'l leisure travelers  
considering California  
"CA Traveler Target"

# Booking Preferences

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

## India



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?



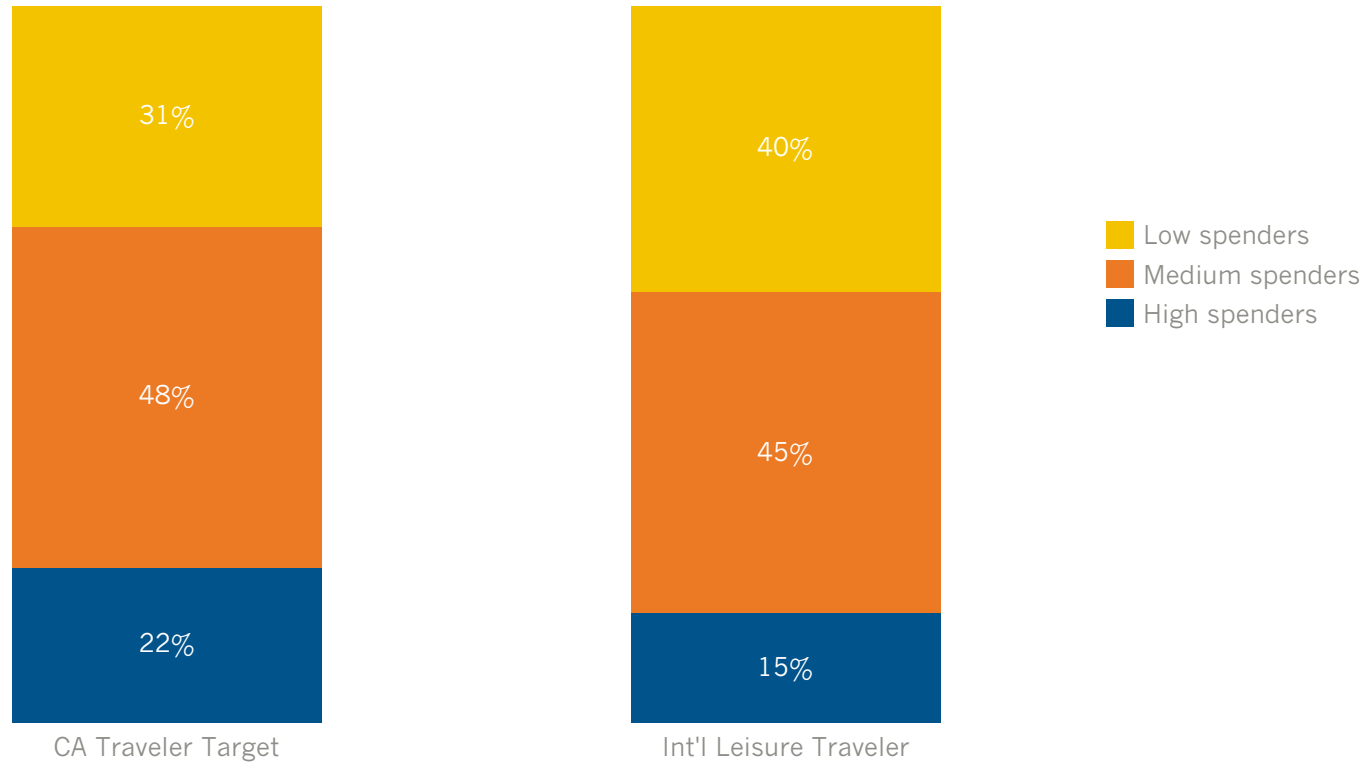
Int'l leisure travelers  
considering California  
"CA Traveler Target"

# Travel Spending

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

India

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.

## India

### Advertising Influences

	CA Traveler Target	Index
Social media	63%	149
Direct mail	53%	137
Billboards	55%	159
Cinema	51%	134
Local newspaper (physical)	53%	151
Travel websites	51%	168
Local newspaper (digital)	49%	164
Magazines (digital)	49%	158
Magazines (physical)	48%	168
Online streaming services	45%	166
TV - Free to view channels	44%	162
TV - paid/subscription	45%	185
National newspaper (physical)	43%	179
National newspaper (digital)	42%	173
Public transport	36%	199
Podcast	31%	232
Radio	27%	214

### Sports Watched/Followed

	CA Traveler Target	Index
Cricket	67%	115
Tennis	46%	154
Soccer/Football	42%	150
Swimming	40%	168
Cycling	40%	175
Basketball	35%	170
Boxing	35%	172
Volleyball	33%	174
Athletics/Track & Field	33%	217
Running/Marathon	28%	187
Golf	28%	214
Gymnastics	26%	177
Horse Racing	26%	205
Ice Hockey	25%	221
Baseball	23%	180
NFL	24%	215
Rugby League	21%	251
Surfing	19%	201
Australian Rules Football	18%	239

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)





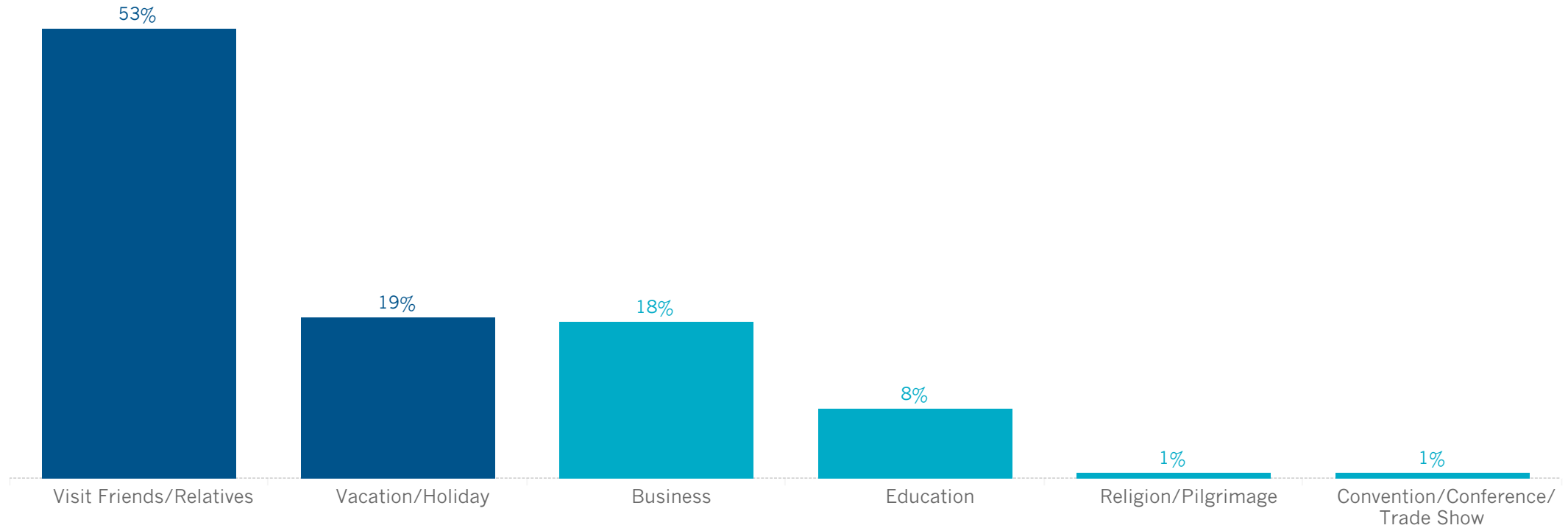
# **California Travelers & California Trip Characteristics**

# Main Purpose of Trip

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

India

Main Purpose of Trip

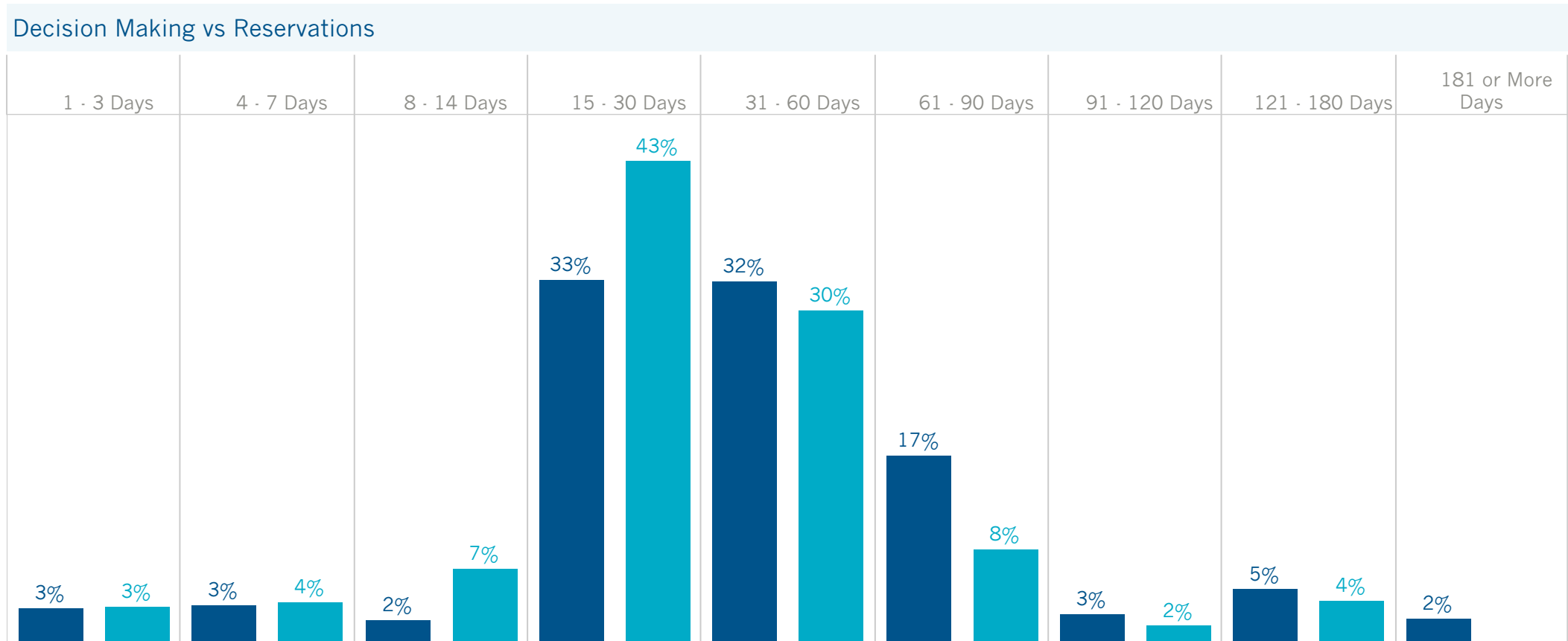




# Decision Making vs Reservations

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

India



- 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?

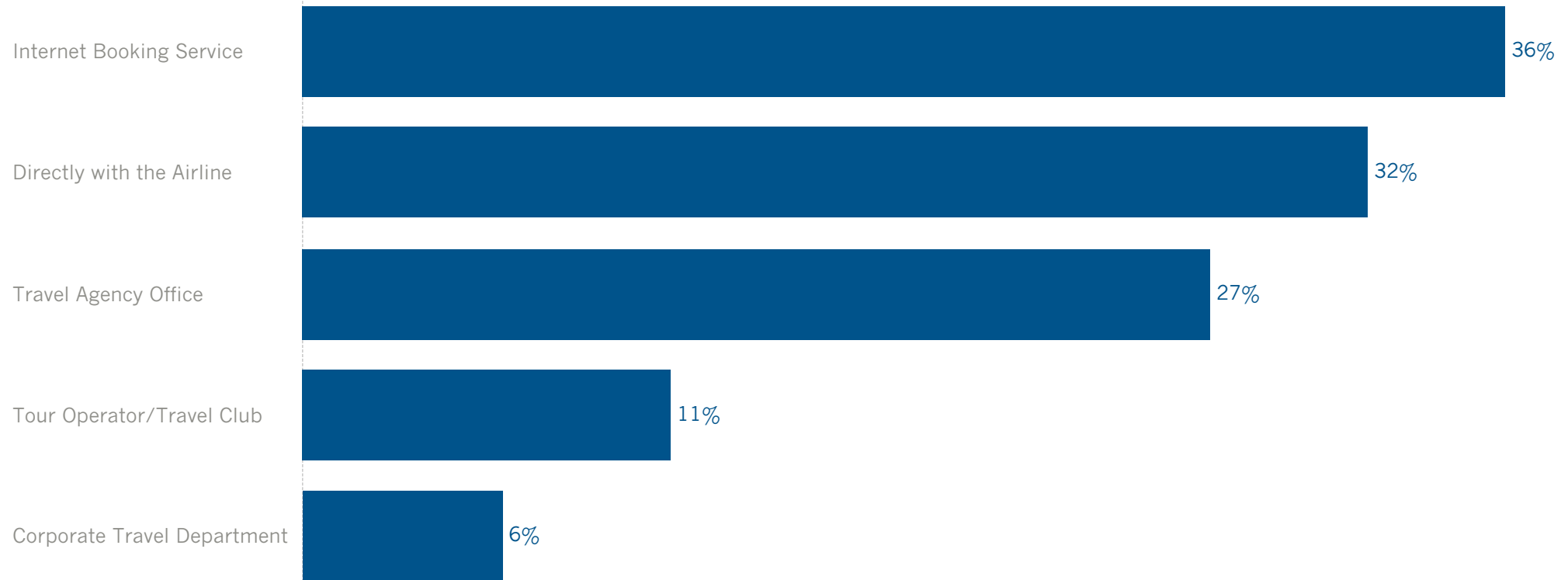


# Airline Reservations

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

## India

### Airline Reservations



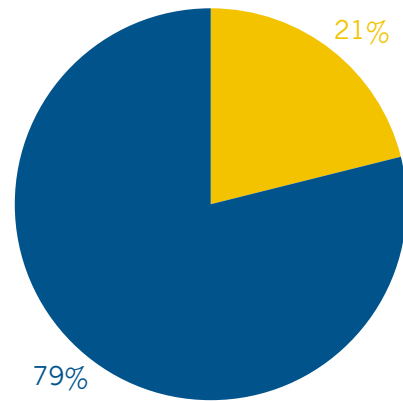


# First/Repeat Visitation, Travel Party Size

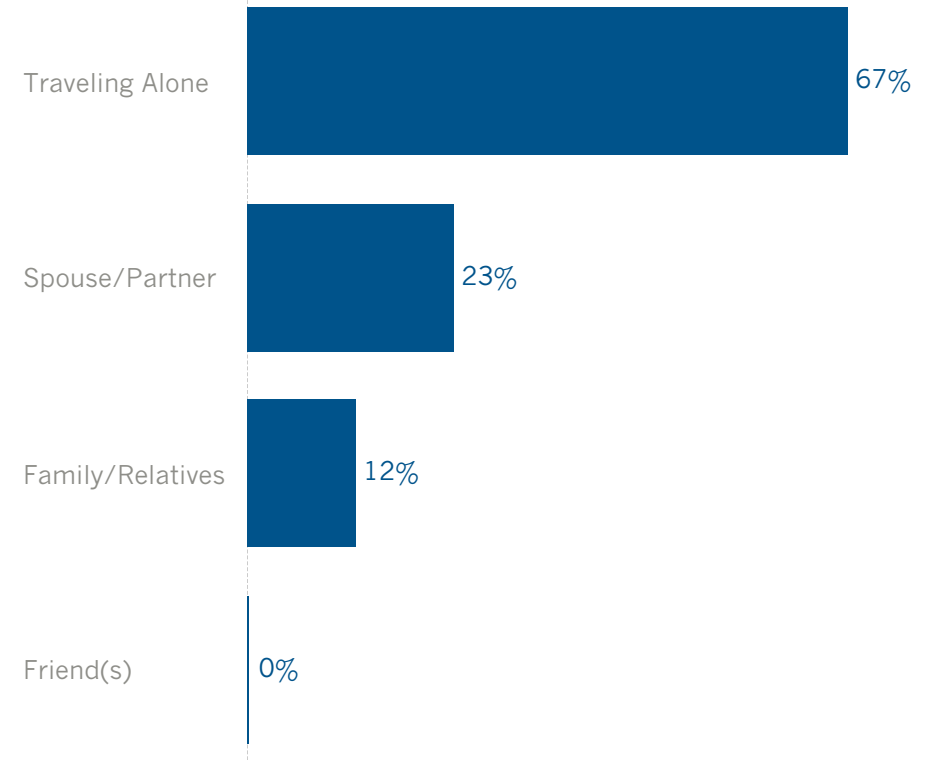
The charts below show first-time and repeat visitation and travel party size among travelers from the focus market.

## India

First trip to the US



Travel Companion



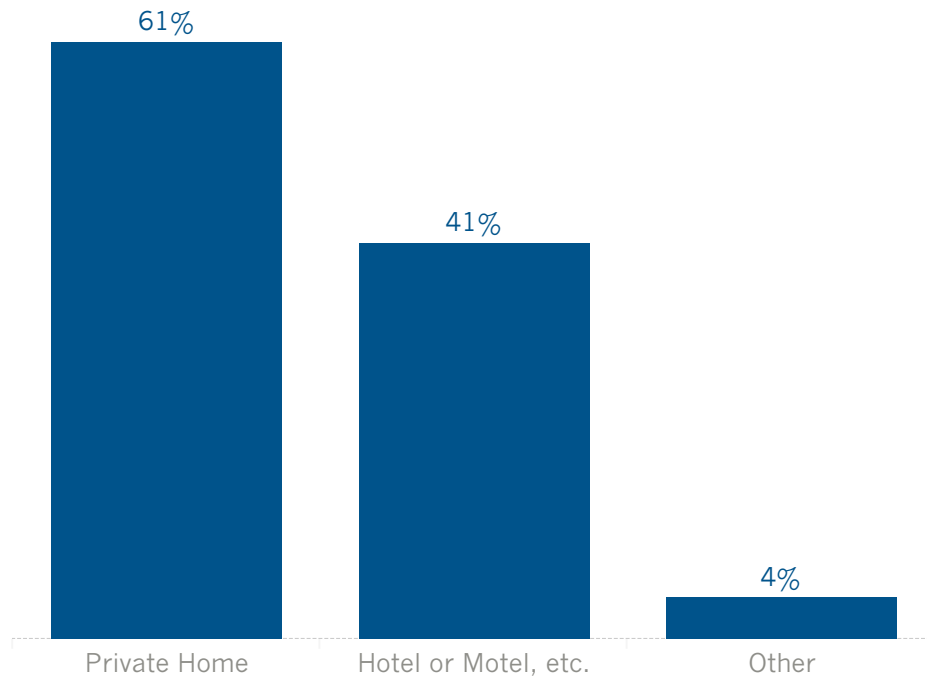


# Types of Accommodations & Nights

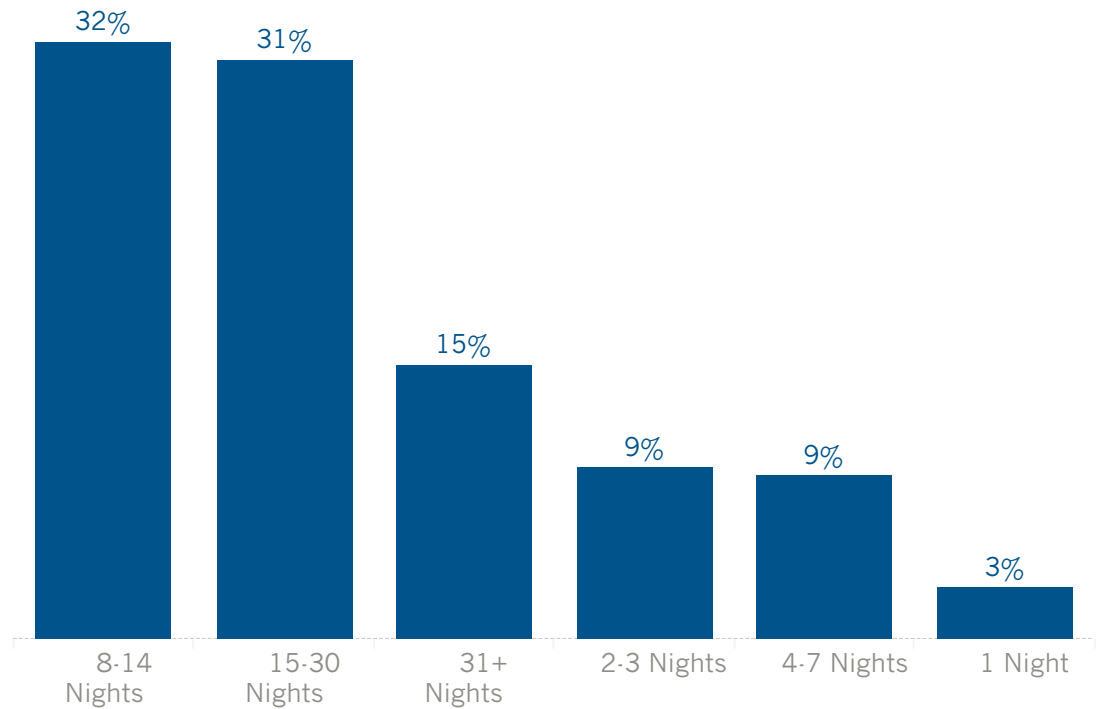
The charts below show types of accommodations stayed in and number of nights in destination among travelers from the focus market.

India

Types of Accommodations



Nights in Destination



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

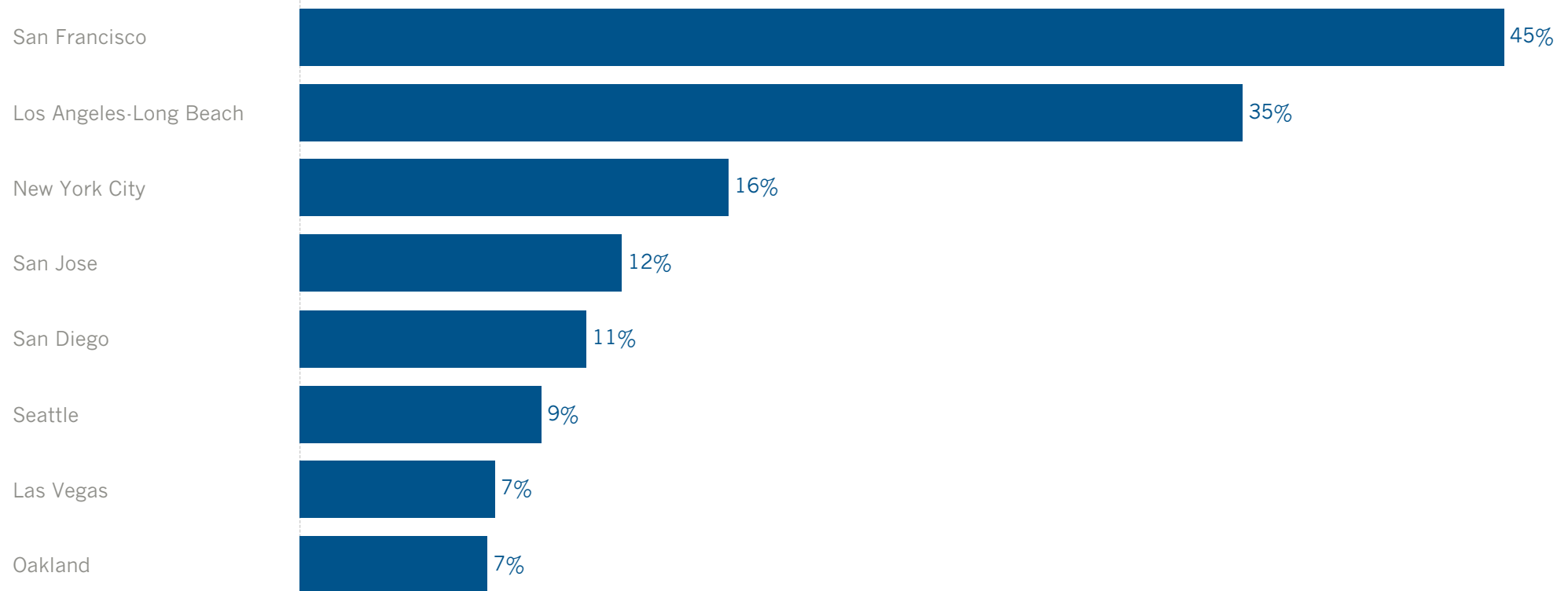


# Destinations Visited

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

## India

### US Destinations visited

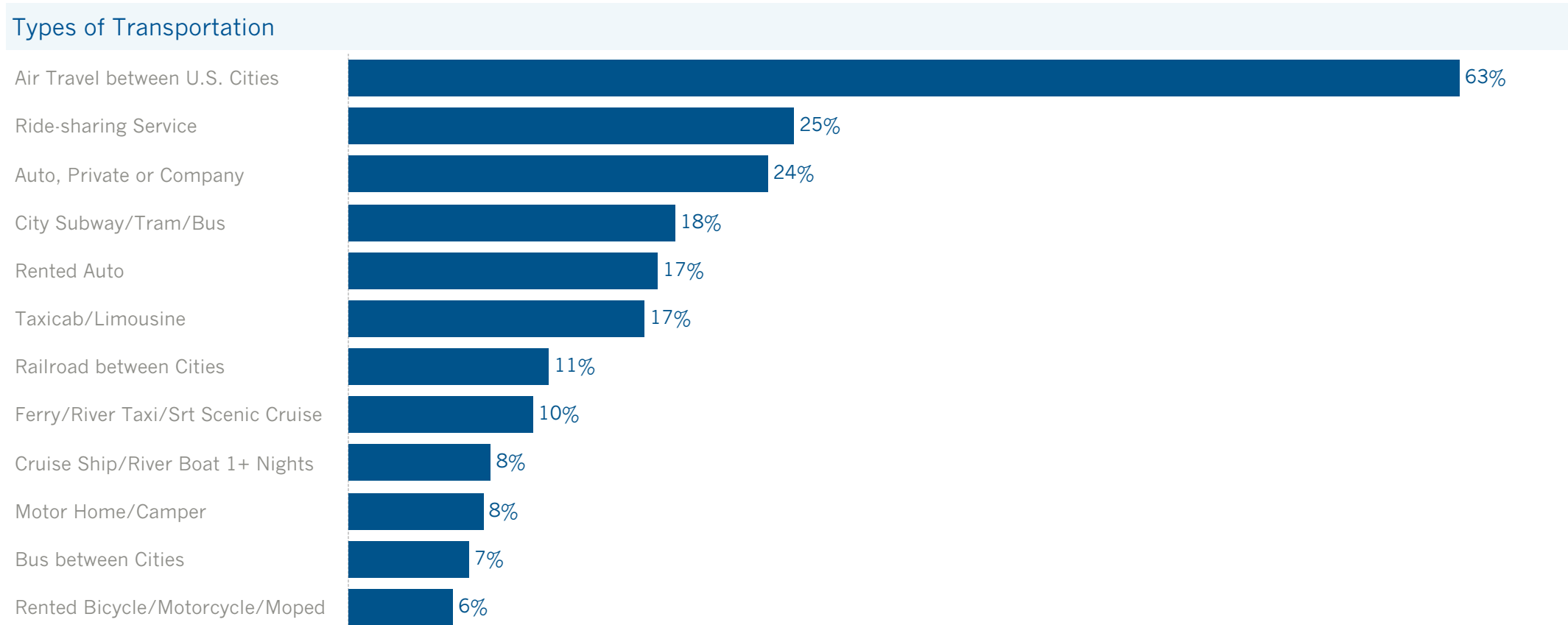




# Transportation

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

## India





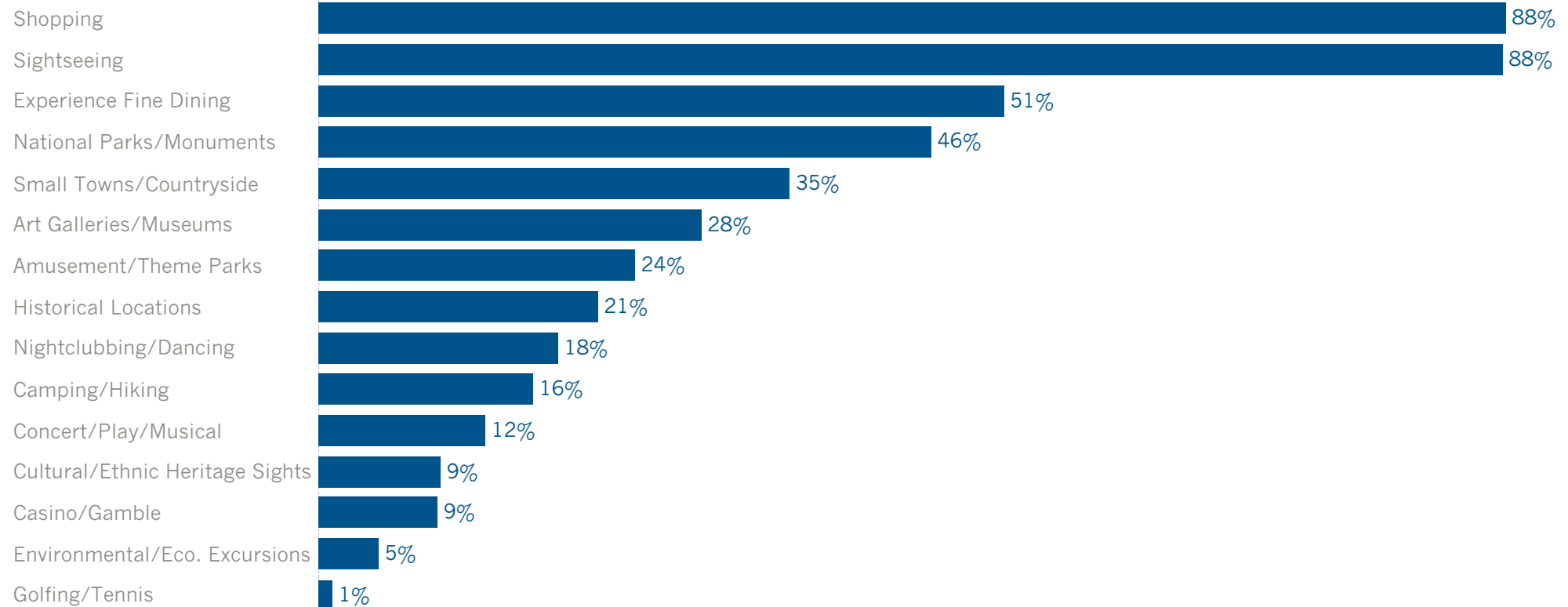


# Activities

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

## India

### Leisure Activities





# Expenditures in the US

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

India

## Expenditures per visitor

