



MARKET PROFILES JAPAN



DESTINATION
BRITISH COLUMBIA®

MARKET OVERVIEW



<p>MARKET POTENTIAL†</p> <p>Likelihood to visit BC in the next 2 years</p>	<p>POTENTIAL DEMAND†</p> <p>1.70M</p>	<p>MARKET VISITATION RANK**</p> <p>Japan is the 7th largest international market for BC</p>
<p>MARKET STATUS***</p> <p>Monitor</p>		

BC PAST PERFORMANCE

<p>VISITATION [1]</p> <p>+5%</p> <p>Average annual growth rate (2014-2019)</p> <p>53%^ℓ</p> <p>BC's share of Canadian Japanese visitation</p>	<p>EXPENDITURES [1]</p> <p>+10%</p> <p>Average annual growth rate (2014-2019)</p> <p>40%^Ω</p> <p>BC's share of Canadian Japanese expenditures</p>	<p>NET PROMOTER SCORE †</p> <p>-14</p> <p>Promoters 20% Passives 47% Detractors 33%</p> <hr/> <p>AIRLINE SEAT CAPACITY †</p> <p>-1%</p>
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MARKET HIGHLIGHTS

#3

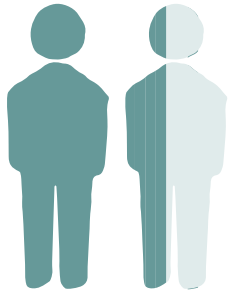
Japan was the third largest Asia/Pacific market for BC, accounting for 10% of BC's total visitation from Asia/Pacific.^[1]

More than four-fifths of Japanese visitors to BC use a travel agent for their trip; either for research or booking.^[4]

44% of Japanese visitors to Canada booked their trip as part of an organized group travel package.[†]

TRAVELLER AND TRIP CHARACTERISTICS

AVERAGE TRAVEL PARTY SIZE**

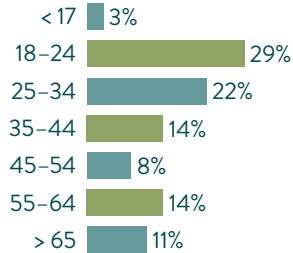


1.4

TOP 3 EQ TYPES °

- Cultural History Buffs
- Free Spirits
- Group Tourists

AGE**



PAST VISITATION TO CANADA †



SPENDING**



AVERAGE TRIP LENGTH IN BC**

14 Nights



TRIP PURPOSE**



TOP 5 ACTIVITIES ◊

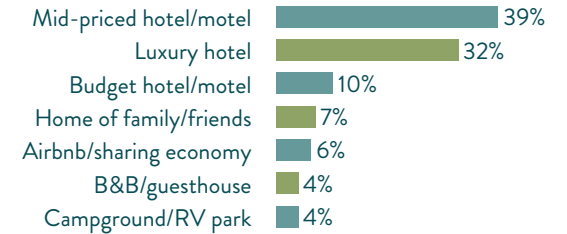
- Natural attractions like mountains or waterfalls
- City green spaces like parks or gardens
- Nature parks
- Hiking or walking in nature
- Shopping

ONLINE TRAVEL BOOKINGS [2]

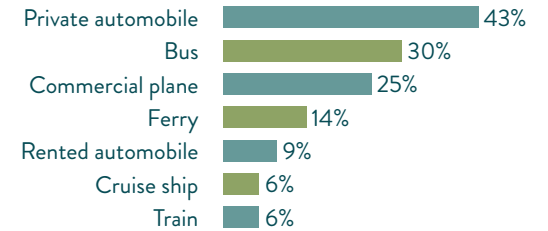
43%



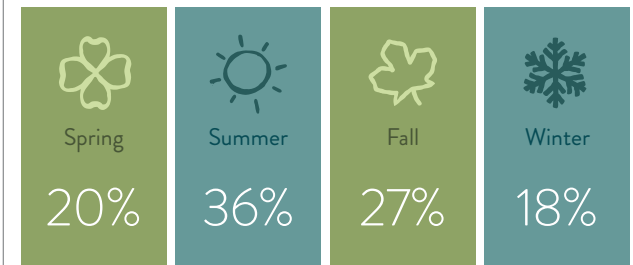
ACCOMMODATIONS ◊



TRANSPORTATION USED DURING TRIP**



TRAVEL SEASONS**



TRAVEL AGENT/TOUR OPERATOR USAGE ◊

	Researching	Booking
Flights	36%	42%
Accommodations	37%	43%
Transportation	16%	15%
Activities	26%	17%
Potential Travel Destinations	37%	
16% Did not use a travel agent		

* Euromonitor

** Destination BC tabulations from the 2017 International Travel Survey (Statistics Canada)

*** Destination BC Global Marketing Plan 2020

ℓ Destination BC Tabulations from Statistics Canada Frontier Counts

† Destination Canada's Global Tourism Watch (2018)

‡ Forwardkeys

◊ Destination Canada's Global Tourism Watch (2018 & 2019)

Ω Small Area Estimates (Statistics Canada)

[1] Destination BC Internal Estimates

[2] Phocuswright