CHINA

GERMANY

JAPAN

MEXICO

SOUTH

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MARKET PROFILES Australia

FEBUARY 2023

The 2023 International Market Profiles contain the latest information and highlights on Destination BC's key International markets (excluding US markets). This publication summarizes each target market, including the size of the market, volume and expenditures in BC, and traveller and trip characteristics. The latest market highlights and indicators of future travel are also included. Highlights and factors are ever-changing—as such, those available here are time-stamped from the date of publication.



Market Overview

2022 Overnight Outbound Departures from Australia^Ω

4,969,000

Change in Overnight Departures From 2021 +840%

2022 Market Visitation Rank ††

Australia was the 4th Largest International
Market for BC in 2022 2023 Market Status§

Invest

2022 Market Potential

18%

Likelihood to Visit BC Within the Next 2 Years^{SS}

1.2M

2022 Potential Demand™

BC Performance

2022 Estimated Visitation^{††}



92,000

10% Australia's Share of International Visitation in BC (excluding US)

184,000 2023 Forecasted Visitation

2022 Estimated Expenditure^{††}



\$173.2M

110/ Australia's Share of International Expenditures in BC (excluding US)

\$360.2M 2023 Forecasted Expenditures

2022 BC Travel Search Queries[△]



+114% Change Over 2021

DESTINATION BRITISH COLUMBIA®

SOURCES

- π Destination Canada's Global Tourism Watch (2021)
- ΣΣ Destination Canada's Global Tourism Watch (Pooled 2020–2021) § Destination BC's Global Marketing Plan (2023)
- †† Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2022)
- Destination BC's Public Perceptions Tracker (December 2022)

♦ ForwardKeys (January 2023)

 Ω Touism Economics (2022) Deloitte's Tourism Market Outlook (2022)

Δ Google InVITE Travel Search Queries (January 2023)

Brand USA's International Travel & Consumer Sentiment Survey (May 2022) € Destination Canada's 2022 Market Highlights | Australia (2022)

Future Travel Indicators

BC Residents' Comfort Welcoming International Visitors to Their Community¶



Likelihood to Travel Internationally in the Next 12 Months

53%



Change Over 2022

Air Capacity to BC in 2023

..... Market Highlights



Australian travellers are looking for "iconic, memorable and authentic" travel experiences, where they can create lifelong memories.€



Australians are eager to resume international travel, bolstered by a strong economy.



A large majority of travellers from Australia utilize travel agents, with this number expected to grow for post-COVID travel. €



Australia may limit how quickly the Australian market can rebound, with air capacity in September 2022 reaching only 55% of 2019 capacity. €

International air capacity from



CHINA

GERMANY

JAPAN

MEXICO

SOUTH KOREA

UNITED KINGDOM

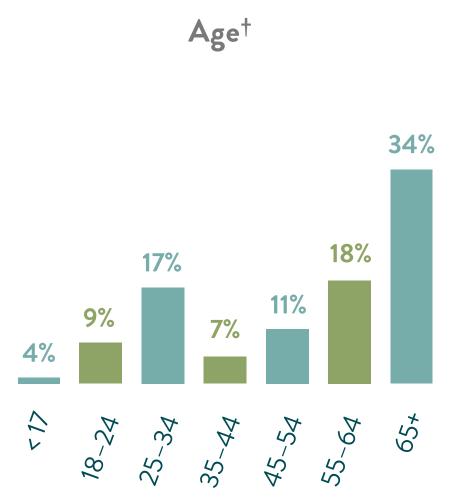
MARKET PROFILES Australia

FEBRUARY 2023

Traveller and trip characteristics are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs. Seasonal and geographical dispersion is reflective of 2022.

Traveller and Trip Characteristics





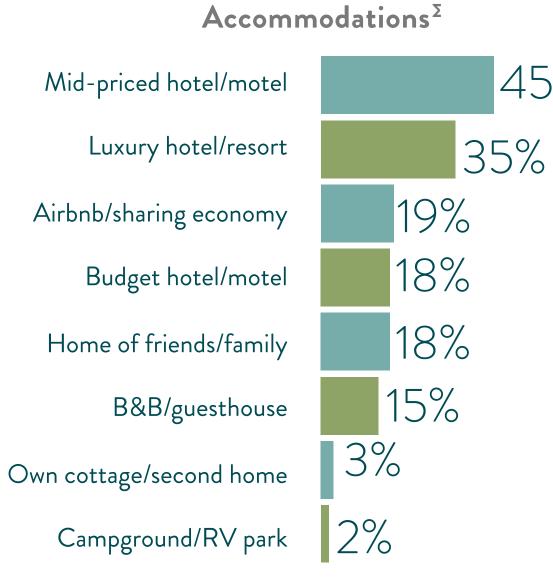
Top 3 EQ Types[∑] Social Samplers Cultural Explorers No Hassle Travellers

Travel to Canada Past 5 Years[∑]

Incidence Rate

Future Travel Agent/Tour Operator Usage[∑]





	Researching	Booking
♣ Flights	29%	47%
Accommodations	22%	34%
Transportation	18%	27%
Activities	17%	22%
Potential Travel Destinations	19%	

50%	20%	68%
Offline	Mobile	Online Supplier
50%	80%	32%
Online	Desktop	Online Travel Agent

Travel Bookings[□]

Trip Purpose[†]

59% 34% 4%

Business

Holiday, Leisure or Recreation Visit Family & Friends

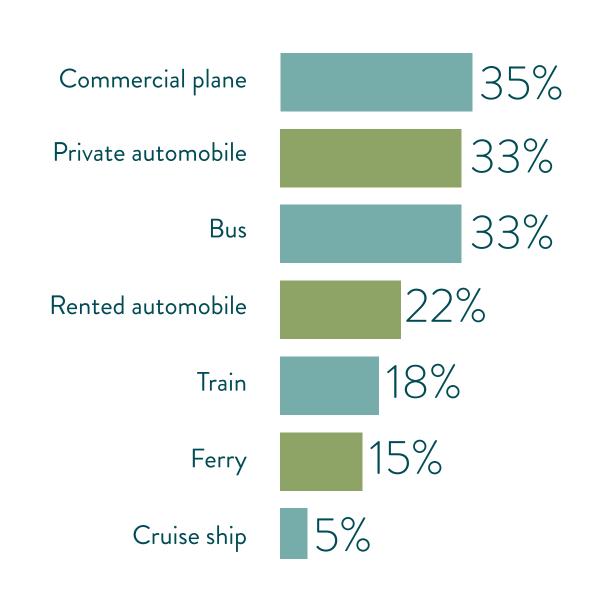
Other



Average Spending Per Person in BC⁵

\$1,814

Transportation Used During Trip[†]



Dispersion

2022 Total Nights by Region^ℓ



2022 Total Nights by Month and Region^e JUL JAN **APR** OCT VCM

DESTINATION BRITISH COLUMBIA®

- Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2019)
- Σ Destination Canada's Global Tourism Watch (Pooled 2018–2019)
- Environics Analytics (2022) ℓℓ Environics Analytics (2019)
- Π Phocuswright (2019)



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MARKET PROFILES China

FEBRUARY 2023

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2022 Overnight Outbound Departures from China^Ω

7,503,000

Change in Overnight Departures From 2021 +58%

2022 Market Visitation Rank ††

China was the 8th Largest International Market for BC in 2022 2023 Market Status§

Monitor

2022 Market Potential⁵

26%

5.1M

Likelihood to Visit BC Within the Next 2 Years^{SS} 2022 Potential Demand™

BC Performance

2022 Estimated Visitation^{††}



27,000

3 China's Share of International Visitation in BC (excluding US)

2023 Forecasted Visitation

2022 Estimated Expenditure^{††}



\$55.9M

China's Share of International Chinas Snare of Internals
Expenditures in BC (excluding US)

\$145.3M 2023 Forecasted Expenditures

SOURCES

- π Destination Canada's Global Tourism Watch (2021)
- ΣΣ Destination Canada's Global Tourism Watch (Pooled 2020–2021) § Destination BC's Global Marketing Plan (2023)
- †† Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2022)
- Destination BC's Public Perceptions Tracker (December 2022) ♦ ForwardKeys (January 2023)

Future Travel Indicators

BC Residents' Comfort Welcoming International Visitors to Their Community¶



Likelihood to Travel Internationally in the Next 12 Months



Change Over 2022

Air Capacity to BC in 2023

Market Highlights



With international travel re-opened in China, desire for international travel is high, with a January 2023 survey indicating over 60% of travellers expressing a desire to travel outside of mainland China in 2023.^e



The 2022 Winter Olympics in Beijing created an increased interest in winter sports and activities in Chinese travellers. €



Visitation from Asian markets, including China, is expected to remain slow in 2023, due to ongoing hesitation regarding long-haul travel, however, Chinese travel is expected to rebound and out-pace other asian markets in the long-term."

- Ω Touism Economics (2022)
- Brand USA's International Travel & Consumer Sentiment Survey (May 2022)
- € Destination Canada's 2022 Market Highlights | China (2022) January 2023 Chinese Traveler Sentiment Report, Dragon Trail International (January 2023)
- Destination Canada, Tourism Outlook (Fall 2022)





GERMANY

JAPAN

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SOUTH KOREA

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CHINA | 2

MARKET PROFILES

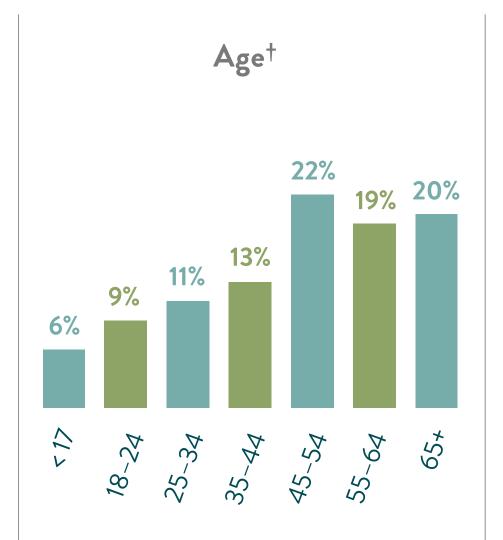
China

FEBRUARY 2023

Traveller and trip characteristics are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs. Seasonal and geographical dispersion is reflective of 2022.

Traveller and Trip Characteristics





Top 3 EQ Types[∑]

Free Spirits Aspiring Escapists Gentle Explorers

Travel to Canada Past 5 Years[∑]

Incidence Rate

Booking

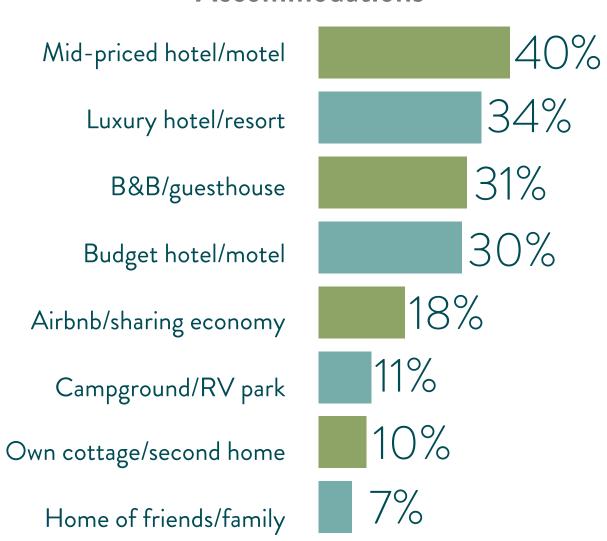
Online Supplier

Average Trip Length in BC^{ℓℓ}

Nights



Accommodations²



Future Travel Agent/Tour Operator Usage⁵

Researching

56%	53%
59%	52%
40%	30%
45%	31%
44%	
	59% 40% 45%

Travel Bookings[□] 39% 84% 44%

Offline

16% 61% 56% Online Travel Agent Online Desktop

Mobile

Trip Purpose[†]

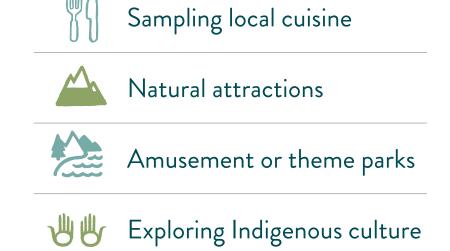
34% 46% 7% 13%

Holiday, Leisure or Recreation Visit Family & Friends

Business

Other

Top 5 Activities[∑]

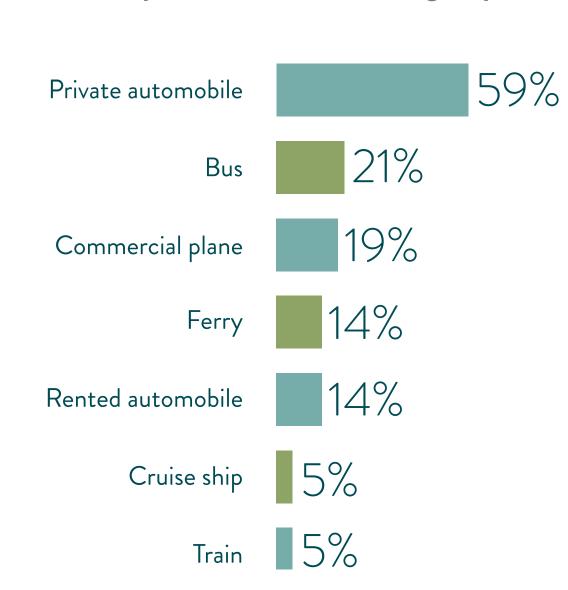


Heritage and history

Average Spending Per Person in BC⁵

\$2,021

Transportation Used During Trip[†]

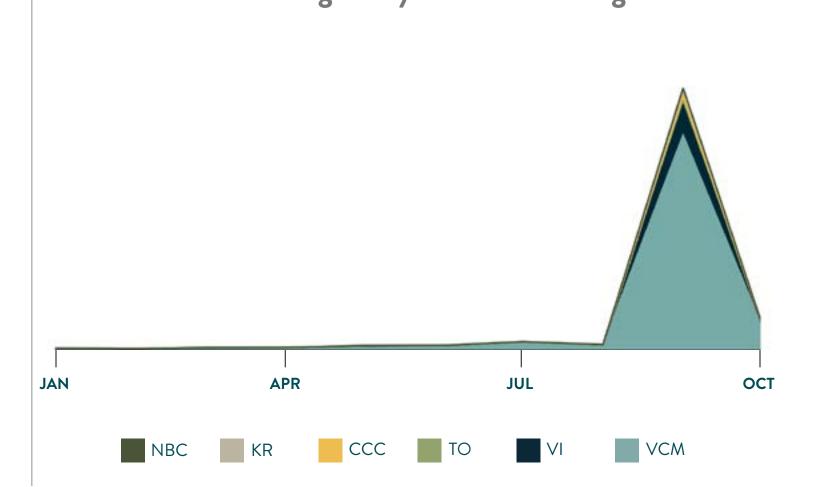


Dispersion

2022 Total Nights by Region^e

Avg. **Share of Total** Nights in BC Nights 8.5 1% Northern British Columbia 0% Cariboo Chilcotin Coast Average Nights 12.2 Vancouver Island Per Trip to BC Vancouver, Coast & 88% Mountains 3% Thompson Okanagan 1% 5.3 Kootenay Rockies

2022 Total Nights by Month and Region^e





- Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2019)
- Σ Destination Canada's Global Tourism Watch (Pooled 2018–2019)
- Environics Analytics (2022) ℓℓ Environics Analytics (2019)
- Π Phocuswright (2019)

AUSTRALIA

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GERMANY | 1

MARKET PROFILES

Germany

FEBRUARY 2023

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Market Overview

2022 Overnight Outbound Departures from Germany^Ω

88,703,000

Change in Overnight Departures From 2021 +94%

2022 Market Visitation Rank ††

Germay was the 5th Largest International 2023 Market Status§

Invest

2022 Market Potential⁵

13%

2.7M

Likelihood to Visit BC Within the Next 2 Years^{SS}

2022 Potential Demand™

BC Performance

2022 Estimated Visitation^{††}



84,000

Germany's Share of International Visitation in BC (excluding US)

2023 Forecasted Visitation

2022 Estimated Expenditure^{††}



\$135.3M

Germany's Share of International Expenditures in BC (excluding US)

\$188.5M 2023 Forecasted Expenditures

2022 BC Travel Search Queries[△]



DESTINATION

BRITISH COLUMBIA®

+53% Change Over 2021

SOURCES

- π Destination Canada's Global Tourism Watch (2021)
- ΣΣ Destination Canada's Global Tourism Watch (Pooled 2020–2021) Destination BC's Global Marketing Plan (2023)
- †† Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2022)
- Destination BC's Public Perceptions Tracker (December 2022)

♦ ForwardKeys (January 2023)

Δ Google InVITE Travel Search Queries (January 2023)

 Ω Touism Economics (2022)

√ Brand USA's International Travel & Consumer Sentiment Survey (May 2022)

Destination Canada's 2022 Market Highlights | Germany (2022) % MarketWatch, 'German Consumer Confidence Set to Improve in January as Energy Relief Plan Kicks In' (December 2022)

Future Travel Indicators

BC Residents' Comfort Welcoming International Visitors to Their Community¶



Likelihood to Travel Internationally In the next 12 months



Change Over 2022

Air Capacity to BC in 2023

Market Highlights



With increased awareness of sustainable travel, more mindful and sustainable travel options are resonating well with German travellers.€



German confidence in the economy shows signs of recovery, climbing for three months in a row following an historic low in October 2022, with consumer spending increasing in early 2023.[‰]



Following COVID, destinations with an abundance of outdoor activities, uncrowded spaces, and high safety standards have high appeal to German travellers.€





JAPAN

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MARKET PROFILES

CHINA

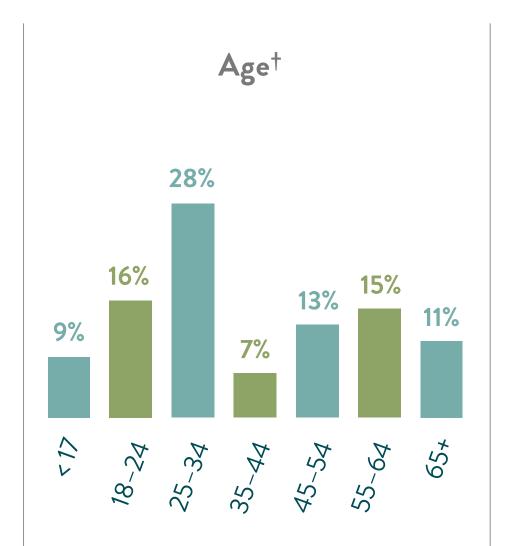
Germany

FEBRUARY 2023

Traveller and trip characteristics are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs. Seasonal and geographical dispersion is reflective of 2022.

Traveller and Trip Characteristics





Top 3 EQ Types[∑] Group Tourists

Authentic Experiencers Cultural Explorers

Travel to Canada Past 5 Years[∑]

Incidence Rate

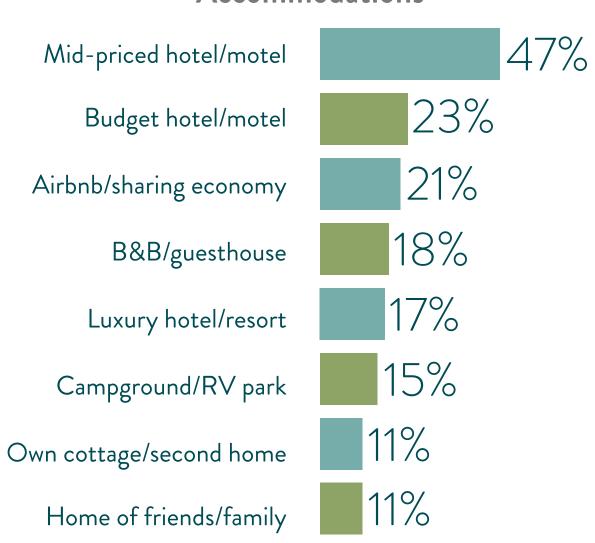
Booking

Online Travel Agent

Average Trip Length in BC^{\ell}



Accommodations²



Future Travel Agent/Tour Operator Usage[∑]

Researching

♣ Flights	37%	32%
Accommodations	28%	24%
Transportation	18%	17%
Activities	24%	9%
Potential Travel Destinations	22%	

	Travel Bookings [□]		
Offline	35% Mobile	61% Online Supplier	
•			

Desktop

Trip Purpose[†]

Holiday, Leisure or Recreation Visit Family & Friends

Business

Other

Top 5 Activities[∑]

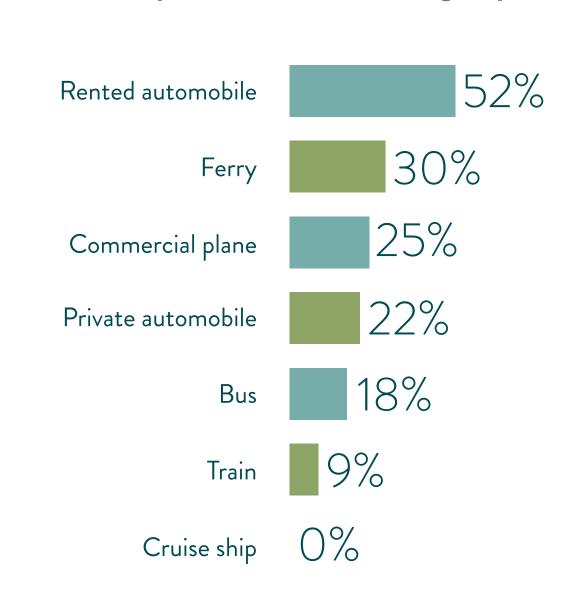


Road trips

Average Spending Per Person in BC⁵

\$1,543

Transportation Used During Trip[†]



Dispersion

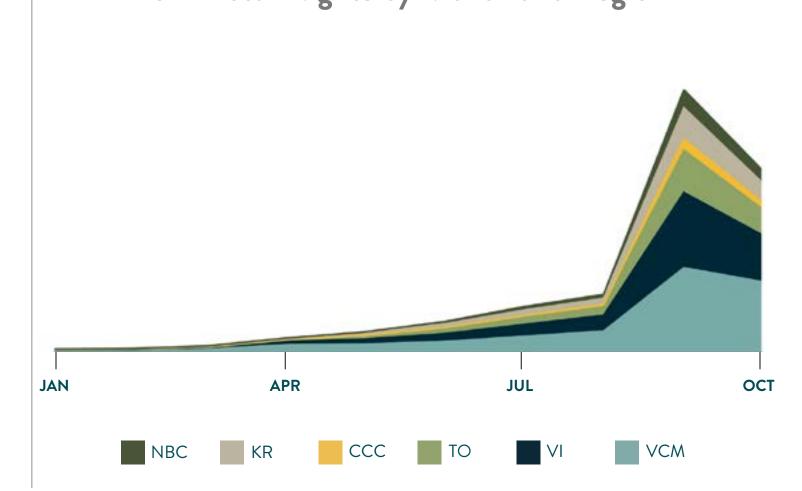
2022 Total Nights by Region^e

50%

Online



2022 Total Nights by Month and Region^e





- Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2019)
- Σ Destination Canada's Global Tourism Watch (Pooled 2018–2019)
- Environics Analytics (2022) ℓℓ Environics Analytics (2019)
- Π Phocuswright (2019)



MEXICO

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MARKET PROFILES

Japan

AUSTRALIA

FEBRUARY 2023

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Market Overview

2022 Overnight Outbound Departures from Japan^Ω

3,648,000

Change in Overnight Departures From 2021 +633%

2022 Market Visitation Rank ††

Japan was the 7th Largest International
Market for BC in 2022 2023 Market Status§

Monitor

2022 Market Potential

7%

1.1M

Likelihood to Visit BC Within the Next 2 Years^{SS}

2022 Potential Demand™

BC Performance

2022 Estimated Visitation^{††}



28,000

3 / Japan's Share of International Visitation in BC (excluding US)

2023 Forecasted Visitation

2022 Estimated Expenditure^{††}



3 / Japan's Share of International Expenditures in BC (excluding US)

\$101.9M 2023 Forecasted Expenditures

2022 BC Travel Search Queries^A



DESTINATION

+46% Change Over 2021

SOURCES

- π Destination Canada's Global Tourism Watch (2021)
- ΣΣ Destination Canada's Global Tourism Watch (Pooled 2020–2021) § Destination BC's Global Marketing Plan (2023)
- †† Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2022)
- Destination BC's Public Perceptions Tracker (December 2022)

♦ ForwardKeys (January 2023)

Future Travel Indicators

BC Residents' Comfort Welcoming International Visitors to Their Community¶



Likelihood to Travel Internationally In the next 12 months



Change Over 2022

Air Capacity to BC in 2023

Market Highlights



Health and safety is a priority for post-COVID Japanese travellers, which may delay the recovery of group travel and an increased preference for individual or small-group travel. €



The yen depreciated significantly in 2022, falling by around 19% relative to the US dollar; effectively raising the cost of travel for prospective travellers. ±



Japanese travellers are drawn to places with a focus on wellbeing and rejuvenation, enjoying nature and wide-open spaces.€



Visitation from Asian markets, including Japan, is expected to remain slow in 2023, due to ongoing hesitation regarding long-haul travel. Despite this, visitation is anticipated to climb steadily, reaching 79% of 2019 levels in 2024."

- Δ Google InVITE Travel Search Queries (January 2023)
- Touism Economics (2022)
- Brand USA's International Travel & Consumer Sentiment Survey (May 2022)
- Destination Canada's 2022 Market Highlights | Japan (2022) Kyodo News, 'Young people hit more by Japan inflation, "excess" savings no savior: gov't' (February 2023)
- Destination Canada, Tourism Outlook (Fall 2022)



CHINA



GERMANY

JAPAN

SOUTH KOREA MEXICO

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JAPAN | 2

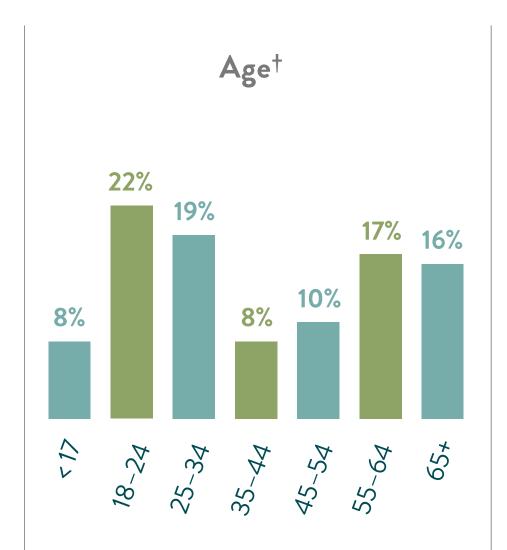
MARKET PROFILES

FEBRUARY 2023

Traveller and trip characteristics are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs. Seasonal and geographical dispersion is reflective of 2022.

Traveller and Trip Characteristics





Top 3 EQ Types[∑] Cultural Historians

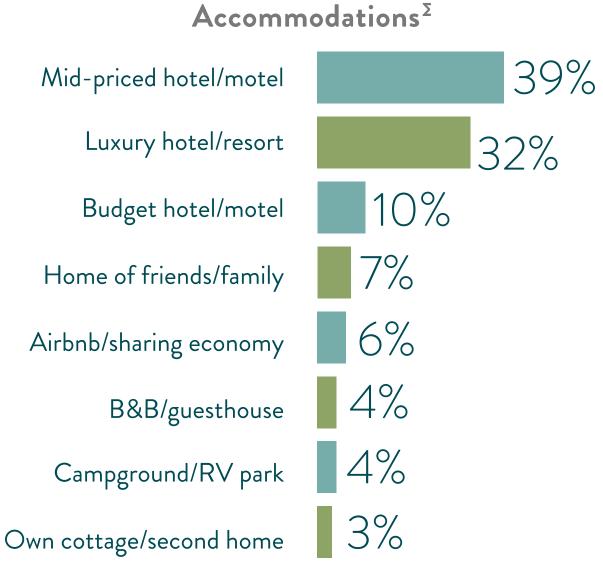
Free Spirits Personal History Buffs

Travel to Canada Past 5 Years[∑]

Incidence Rate

Average Trip Length in BC^{ℓℓ}

Nights



Future Travel Agent/Tour Operator Usage⁵

	Researching	Booking
♣ Flights	36%	42%
Accommodations	37%	43%
Transportation	16%	15%
Activities	26%	17%
Potential Travel Destinations	37%	

Travel Bookings[□]

55%	41%	56%
Offline	Mobile	Online Supplier
45%	59%	44%
Online	Desktop	Online Travel Agent

Trip Purpose[†]

34% 44% 7%

Holiday, Leisure or Recreation Visit Family & Friends

Business

Other

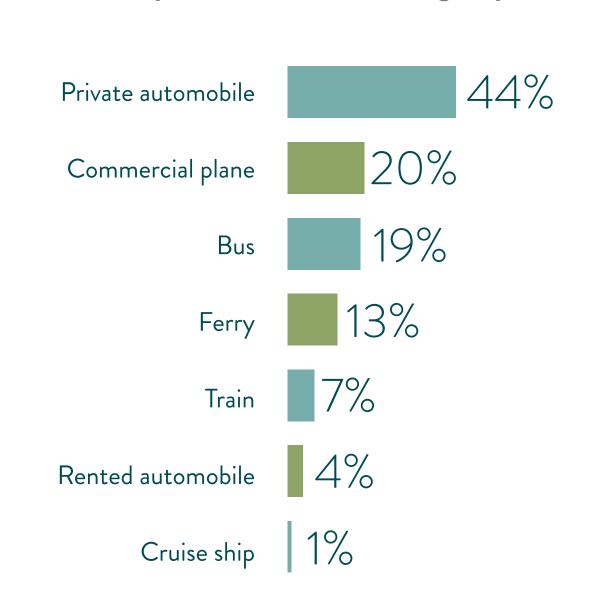
Top 5 Activities[∑]



Average Spending Per Person in BC⁵

\$1,610

Transportation Used During Trip[†]

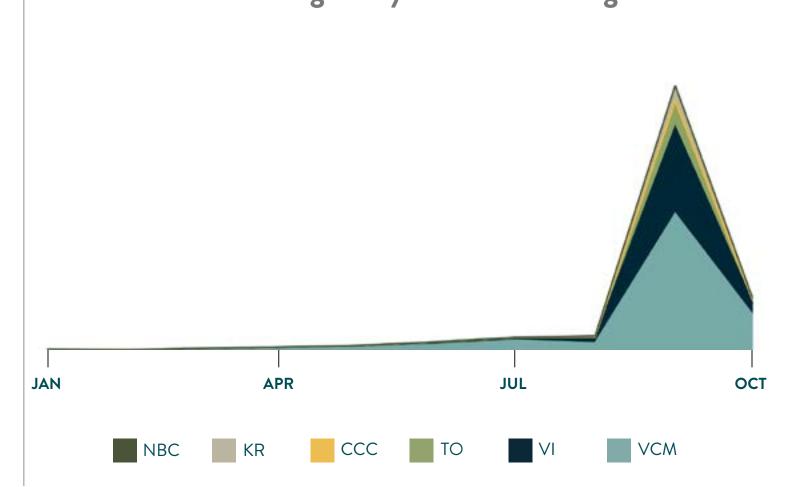


Dispersion

2022 Total Nights by Region^ℓ



2022 Total Nights by Month and Region^e





- Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2019)
- Σ Destination Canada's Global Tourism Watch (Pooled 2018–2019)
- Environics Analytics (2022) ℓℓ Environics Analytics (2019)
- Π Phocuswright (2019)



SOUTH KOREA

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MEXICO | 1

MARKET PROFILES

Mexico

FEBRUARY 2023

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Market Overview

2022 Overnight Outbound Departures from Mexico^Ω

15,106,000

Change in Overnight Departures From 2021 +38%

2022 Market Visitation Rank ††

Mexico's was the 3rd Largest International Market for BC in 2022 2023 Market Status§

Invest

2022 Market Potential

23%

0.82M

Likelihood to Visit BC Within the Next 2 Years^{SS}

2022 Potential Demand™

BC Performance

2022 Estimated Visitation^{††}



104,000

11% Mexico's Share of International Visitation in BC (excluding US)

2023 Forecasted Visitation

2022 Estimated Expenditure^{††}



\$190.1M

12% Mexico's Share of International Expenditures in BC (excluding US)

\$223.4M 2023 Forecasted Expenditures

2022 BC Travel Search Queries^a



+57% Change Over 2021

DESTINATION BRITISH COLUMBIA®

SOURCES

- π Destination Canada's Global Tourism Watch (2021)
- ΣΣ Destination Canada's Global Tourism Watch (Pooled 2020–2021)
- § Destination BC's Global Marketing Plan (2023)
- †† Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2022) Destination BC's Public Perceptions Tracker (December 2022)

♦ ForwardKeys (January 2023)

Future Travel Indicators

BC Residents' Comfort Welcoming
International Visitors to Their Community¶



Likelihood to Travel Internationally in the Next 12 Months

64%



+21%

Change Over 2022

Air Capacity to BC in 2023

Market Highlights



There is strong desire for international travel in the Mexican market, with 64% of respondents in a May 2022 survey reporting a high likelihood of international travel within the next 12 months.√√



Close proximity is expected to drive a continued increase in visitation, despite a weakening Mexican economy."



A weakening of the Mexican economy is expected in 2023, with the World Bank estimating an expansion of only 0.9% - a significant downturn from its 2.6% percent growth during 2022.ff



Mexican visitation to Canada is expected to reach 78% of 2019 levels in 2023, with full recovery by 2024."

- Δ Google InVITE Travel Search Queries (January 2023)
- Ω Touism Economics (2022)
- ✓ Brand USA's International Travel & Consumer Sentiment Survey (May 2022) √√ Brand USA Consumer Sentiment Study (May 2022)
- ff The World Bank's Global Economic Prospects (January 2023)
- ∞ Destination Canada, Tourism Outlook (Fall 2022)



SOUTH KOREA

UNITED KINGDOM

MEXICO | 2

MARKET PROFILES

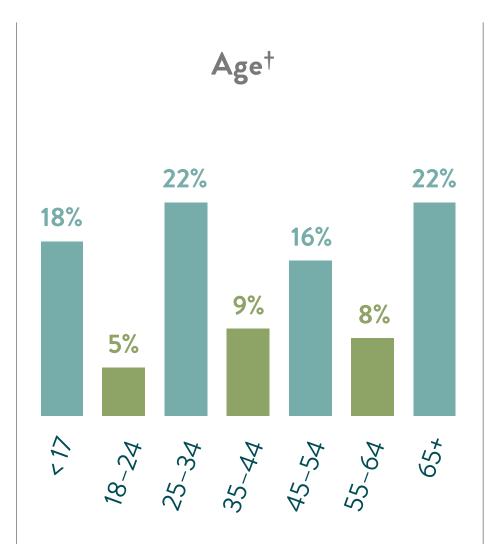
Mexico

FEBRUARY 2023

Traveller and trip characteristics are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs. Seasonal and geographical dispersion is reflective of 2022.

Traveller and Trip Characteristics





Top 3 EQ Types[∑] Authentic Experiencers Free Spirits Group Tourists & Social Samplers



Incidence Rate

Researching

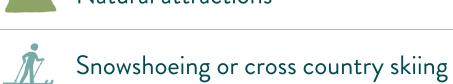
Booking

Online Travel Agent

50% 28% 2% 22% Visit Family Business Other Holiday, Leisure or & Friends Recreation Top 5 Activities[∑] Nature parks Hiking or walking in nature

Trip Purpose[†]

Sampling local cuisine Natural attractions Future Travel Agent/Tour Operator Usage[∑]



Average Spending Per Person in BC⁵

\$1,761

Accommodations² 44% Mid-priced hotel/motel 17% B&B/guesthouse 5% Airbnb/sharing economy 14% Luxury hotel/resort 14% Budget hotel/motel

Average Trip Length in BC^{ℓℓ}



Desktop

Transportation Used During Trip [†]				
Private automobile	34%			
Ferry	28%			
Bus	20%			
Commercial plane	19%			
Rented automobile	19%			
Train	8%			
Cruise ship	6%			

Dispersion

Home of friends/family

Campground/RV park

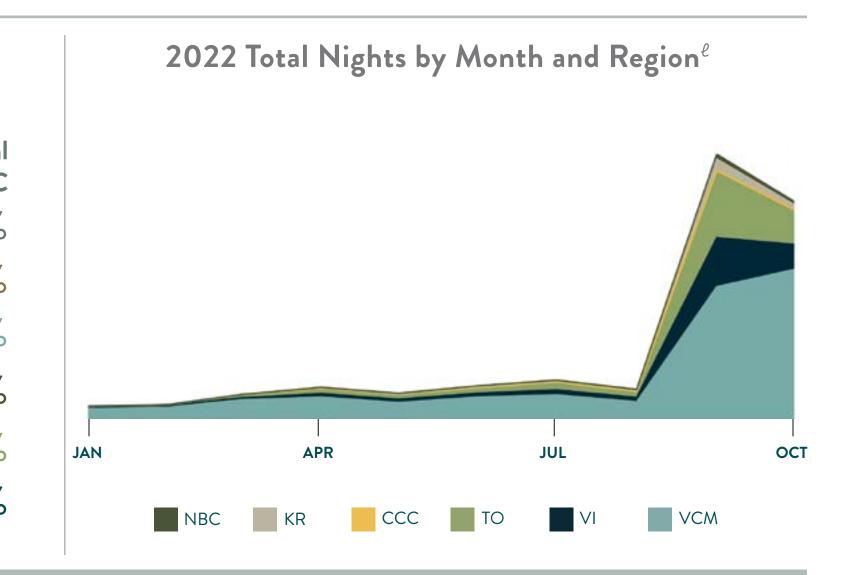
Own cottage/second home

Avg. Nights

2022 Total Nights by Region^ℓ

Online





DESTINATION BRITISH COLUMBIA®

- Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2019)
- Σ Destination Canada's Global Tourism Watch (Pooled 2018–2019)
- Environics Analytics (2022) ℓℓ Environics Analytics (2019)
- Π Phocuswright (2019)

MEXICO

MARKET PROFILES

South Korea

FEBRUARY 2023

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2022 Overnight Outbound Departures from South Korea^{\Omega}

5,129,000

Change in Overnight Departures From 2021 +195%

2022 Market Visitation Rank ††

South Korea was the 6th Largest International Market for BC in 2022

2023 Market Status§

Monitor

2022 Market Potential

17%

3.5M

Likelihood to Visit BC Within the Next 2 Years^{SS}

2022 Potential Demand™

BC Performance

2022 Estimated Visitation^{††}



35,000

South Korea's Share of International Visitation in BC (excluding US)

2023 Forecasted Visitation

2022 Estimated Expenditure^{††}



South Korea's Share of International Expenditures in BC (excluding US)

\$86.6M 2023 Forecasted Expenditures

2022 BC Travel Search Queries[△]



DESTINATION BRITISH COLUMBIA®

SOURCES

- π Destination Canada's Global Tourism Watch (2021)
- ΣΣ Destination Canada's Global Tourism Watch (Pooled 2020–2021) § Destination BC's Global Marketing Plan (2023)
- †† Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2022)
- Destination BC's Public Perceptions Tracker (December 2022)
- ♦ ForwardKeys (January 2023)

Future Travel Indicators

BC Residents' Comfort Welcoming International Visitors to Their Community¶



Likelihood to Travel Internationally in the Next 12 Months

50%



Change Over 2022

Air Capacity to BC in 2023

..... Market Highlights



Visitation from Asian markets, including South Korea, is expected to remain slow in 2023, due to ongoing hestitation regarding long-haul travel.[∞]



South Korean travellers are looking for experiences that increase their wellbeing - from relaxation to time exploring wilderness, opportunities for an escape are well poised to appeal.€



Korean consumers are increasingly pessemistic about their economic future, with low consumer confidence resulting in decreased spending on discretionary goods and travel.*

- Δ Google InVITE Travel Search Queries (January 2023)
- Ω Touism Economics (2022)
- Ipsos Global Consumer Confidence Index (January 2023) Brand USA's International Travel & Consumer Sentiment Survey (June 2021)
- Destination Canada, Tourism Outlook (Fall 2022)
- € Destination Canada's 2022 Market Highlights | South Korea (2022)

MARKET PROFILES

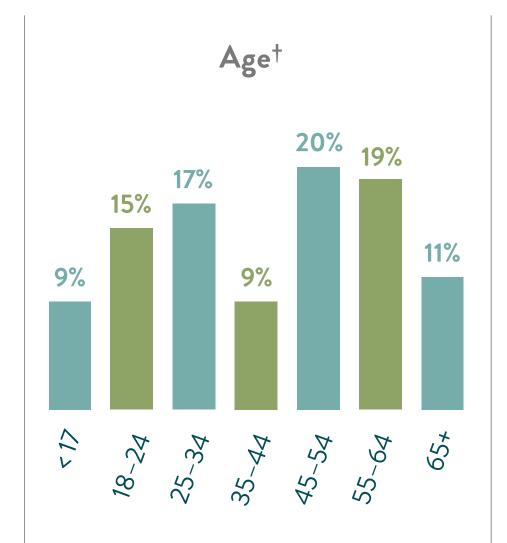
South Korea

FEBRUARY 2023

Traveller and trip characteristics are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs. Seasonal and geographical dispersion is reflective of 2022.

Traveller and Trip Characteristics





Top 3 EQ Types[∑] Free Spirits

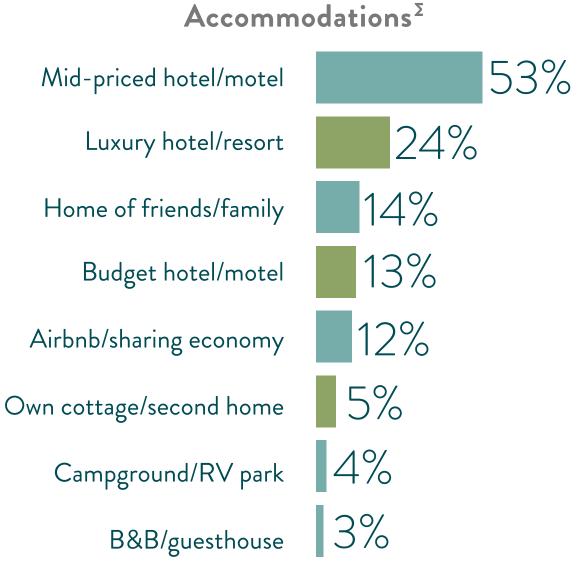
Cultural Historians Personal History Buffs

Travel to Canada Past 5 Years[∑]

Incidence Rate

Booking

Average Trip Length in BC^{ℓℓ}



Future Travel Agent/Tour Operator Usage[∑]

Researching

★ Flights	40%	47%
Accommodations	30%	39%
Transportation	25%	21%
Activities	23%	19%
Potential Travel Destinations	36%	
•	1	

Travel Bookings[□]

Offline	88% Mobile	Online Supplier
53%	12%	23%

Desktop

Online Travel Agent

Trip Purpose[†]

45% 35% 2%

Holiday, Leisure or Recreation Visit Family & Friends

Business

Other

Top 5 Activities[∑]



Natural attractions

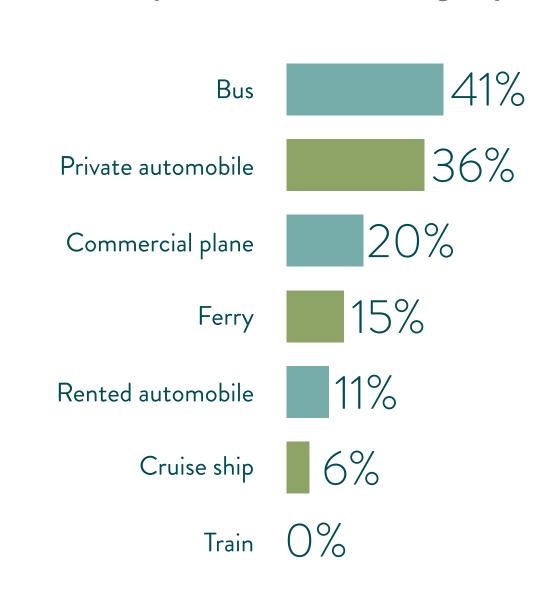
City green spaces

Shopping

Average Spending Per Person in BC⁵

\$1,159

Transportation Used During Trip[†]

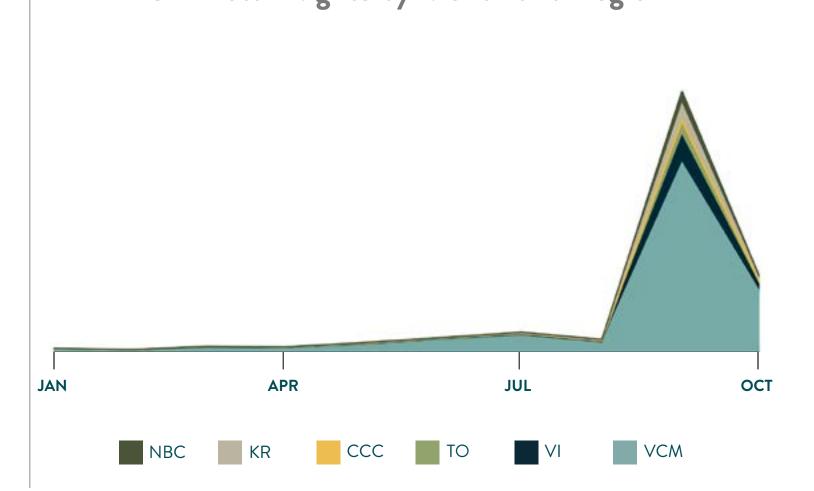


Dispersion

2022 Total Nights by Region^ℓ

Share of Total Avg. Nights in BC Nights 4% 3.4 Northern British Columbia 7.4 Cariboo Chilcotin Coast Average Nights 8% 6.5 Vancouver Island Per Trip to BC Vancouver, Coast & 9.2 80% Mountains 5% Thompson Okanagan 3% 2.5 Kootenay Rockies

2022 Total Nights by Month and Region^e





SOURCES

- Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2019)
- Σ Destination Canada's Global Tourism Watch (Pooled 2018–2019)

Online

- Environics Analytics (2022) ℓℓ Environics Analytics (2019)
- Π Phocuswright (2019)

MARKET PROFILES

United Kingdom

FEBRUARY 2023

The 2023 International Market Profiles contain the latest information and highlights on Destination BC's key International markets (excluding US markets). This publication summarizes each target market, including the size of the market, volume and expenditures in BC, and traveller and trip characteristics. The latest market highlights and indicators of future travel are also included. Highlights and factors are ever-changing—as such, those available here are time-stamped from the date of publication.



Market Overview

2022 Overnight Outbound Departures from United Kingdom^Ω

62,201,000

Change in Overnight Departures From 2021 +294%

2022 Market Visitation Rank ††

United Kingdom was the 2nd Largest International Market for BC in 2022

2023 Market Status§

Invest

17%

Likelihood to Visit BC Within the Next 2 Years^{SS}

3.5M

2022 Potential Demand™

BC Performance

2022 Estimated Visitation^{††}



195,000

21% United Kingdom's Share of International Visitation in BC (excluding US)

262,000 2023 Forecasted Visitation

2022 Estimated Expenditure^{††}



\$278.1M

17% United Kingdom's Share of International Expenditures in BC (excluding US)

\$387.6M 2023 Forecasted Expenditures

2022 BC Travel Search Queries^a



+50% Change Over 2021

DESTINATION BRITISH COLUMBIA®

SOURCES

- π Destination Canada's Global Tourism Watch (2021)
- ΣΣ Destination Canada's Global Tourism Watch (Pooled 2020–2021) § Destination BC's Global Marketing Plan (2023)
- †† Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2022)
- Destination BC's Public Perceptions Tracker (December 2022)
- ♦ ForwardKeys (January 2023)

Future Travel Indicators

BC Residents' Comfort Welcoming International Visitors to Their Community¶



Likelihood to Travel Internationally in the Next 12 Months



Change Over 2022

Air Capacity to BC in 2023

..... Market Highlights



Desire for international travel is slowly rebounding in the UK, with 52% of respondents planning an overseas overnight trip in 2023.



Concerns over inflation and the rising cost of living are the largest barrier for travellers, with the majority (75%) of UK adults expressing increased caution in spending.



Following COVID-19, British travellers are looking for safe, uncrowded spaces, offering plenty of outdoor experiences."

- Δ Google InVITE Travel Search Queries (January 2023)
- Ω Touism Economics (2022)
- √ Brand USA's International Travel & Consumer Sentiment Survey (May 2022)
- < Visit Britain's Domestic Sentiment Tracker (January, 2023)
- Destination Canada's 2022 Market Highlights | UK (2022)

MARKET PROFILES

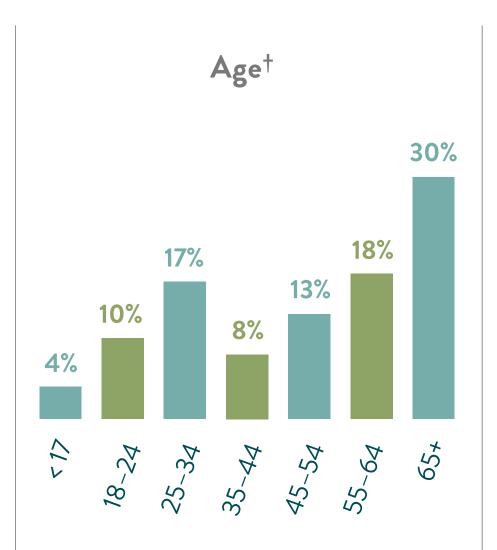
United Kingdom

FEBRUARY 2023

Traveller and trip characteristics are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs. Seasonal and geographical dispersion is reflective of 2022.

Traveller and Trip Characteristics





Top 3 EQ Types[∑] Free Spirits Gentle Explorers Authentic Experiencers

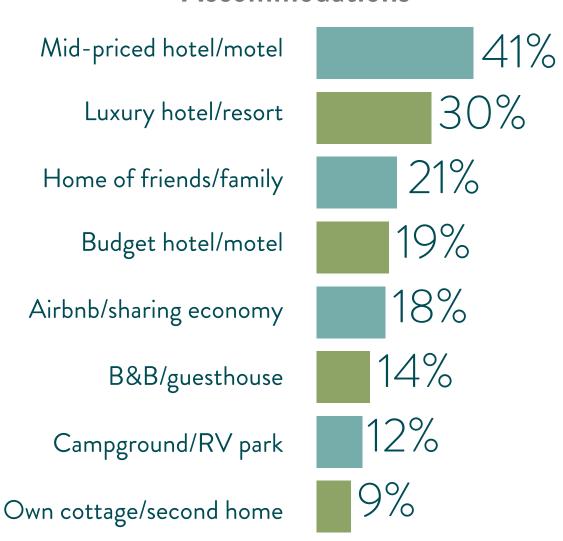
Travel to Canada Past 5 Years[∑]

Incidence Rate

Booking

Average Trip Length in BC^{ℓℓ}

Accommodations²



Future Travel Agent/Tour Operator Usage[∑]

Researching

♣ Flights	28%	35%
• Accommodations	26%	32%
Transportation	20%	32%
Activities	18%	18%
Potential Travel Destinations	23%	

Travel Bookings[□] 41% 31% 74% Offline Mobile Online Supplier

69% 59% Online Desktop

26% Online Travel Agent

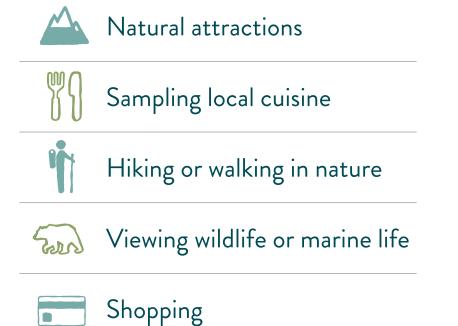
Trip Purpose[†]

Holiday, Leisure or Recreation Visit Family & Friends

Business

Other

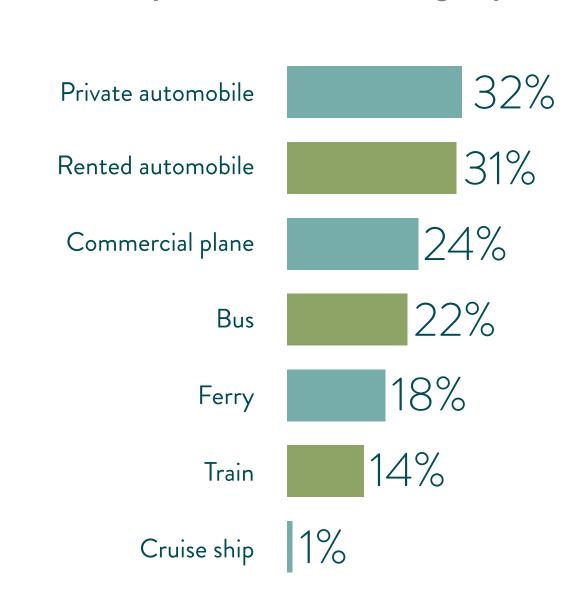
Top 5 Activities[∑]



Average Spending Per Person in BC⁵

\$1,370

Transportation Used During Trip[†]

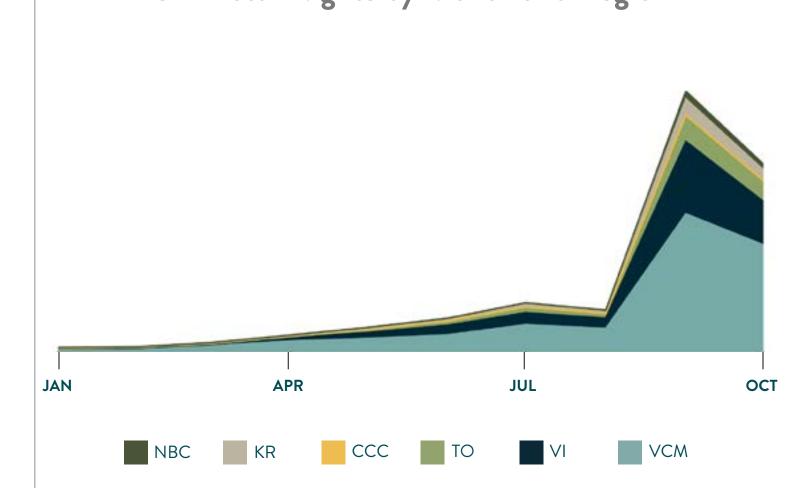


Dispersion

2022 Total Nights by Region^ℓ

Avg. **Share of Total** Nights in BC Nights 5.7 3% Northern British Columbia 1% 3.4 Cariboo Chilcotin Coast Average Nights 23% 7.0 Vancouver Island Per Trip to BC Vancouver, Coast & 8.3 57% Mountains 10% 3.9 Thompson Okanagan 6% 4.7 Kootenay Rockies

2022 Total Nights by Month and Region^e





- Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2019)
- Σ Destination Canada's Global Tourism Watch (Pooled 2018–2019)
- Environics Analytics (2022) ℓℓ Environics Analytics (2019)
- Π Phocuswright (2019)