



MARKET PROFILES
AUSTRALIA



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>1,937M</p>	<p>BC RANK**</p> <p>Australia is the 4th largest international market for BC</p>
<p>MARKET STATUS***</p> <p>Invest for growth</p>		

MARKET INSIGHTS

- The Australian economy continues to show strong growth (GDP growth was 2.3% in 2017).§
- Currently, Australian air capacity to BC is forecasted to grow 11% in 2019.†
- Two-thirds of Australians use a travel agent to plan and book their trip.†
- #2** Australia was the second-largest Asia/Pacific market for BC. Australia accounted for 19% of BC's total visitation from Asia/Pacific.

BC PAST PERFORMANCE

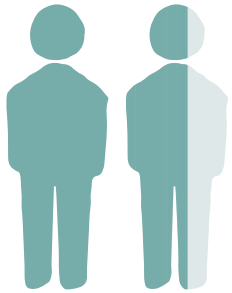
<p>VISITATION [1]</p> <p>+11% Annual growth rate (2013-2017)</p> <p>56%** BC's share of Canadian Australian visitation</p>	<p>EXPENDITURES [1]</p> <p>+11% Annual growth rate (2013-2017)</p> <p>47%** BC's share of Canadian Australian expenditures</p>	<p>NET PROMOTER SCORE †</p> <p>Promoters 38% Passives 45% Detractors 17%</p>
		<p>AIRLINE SEAT CAPACITY †</p> <p>+13%</p>

SHORT-TERM FORECAST (2019)

<p>FORECAST VISITATION TO BC [1]</p> <p>266,000</p> <p>+4%</p>	<p>FORECAST EXPENDITURES TO BC [1]</p> <p>\$539.3M</p> <p>+6%</p>		
<p>AIRLINE SEAT CAPACITY †</p> <p>+11%</p>	<p>BC TRAVEL SEARCH QUERIES [2]</p> <p>+4%</p>	<p>GDP GROWTH §</p> <p>+3%</p>	<p>COST OF \$1 CDN DOLLAR ¶</p> <p>\$ 1.05 AUD (+5%)</p>

TRAVELLER CHARACTERISTICS

TRAVEL PARTY**



1.6

TOP 3 EQ TYPES^[4]

Free Spirits
Virtual Travellers
Cultural Explorers

PAST VISITATION TO CANADA[†]

38%

SPENDING**

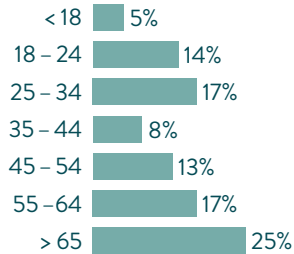
\$1,893
Average spending per person in BC

AVERAGE TRIP LENGTH IN BC**

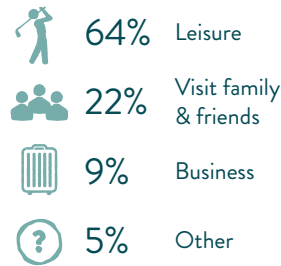
14.3 Nights



AGE**



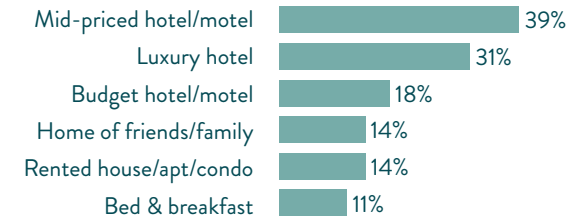
TRIP PURPOSE**



TOP 5 ACTIVITIES[†]



ACCOMMODATIONS[†]

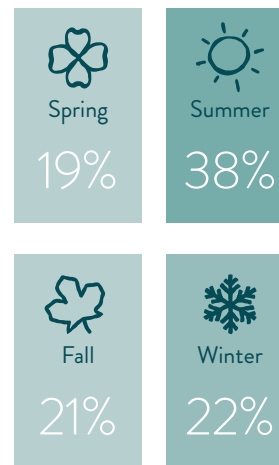


TRAVEL AGENT/TOUR OPERATOR USAGE[†]

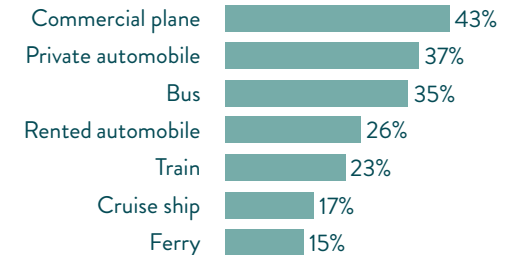


RESEARCHING	30%	24%	19%	15%	15% Potential travel destinations
	42%	29%	21%	16%	
BOOKING					

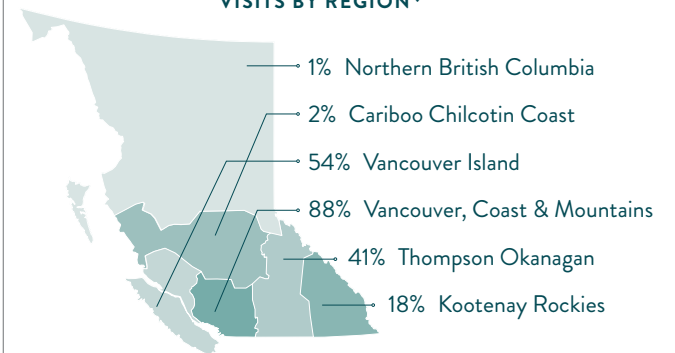
TRAVEL SEASONS^[5]



TRANSPORTATION USED DURING TRIP**



VISITS BY REGION[◊]



TRAVEL BOOKINGS^[3]



* Euromonitor
** Destination BC tabulations from the 2016 International Travel Survey (Statistics Canada)
*** Destination BC Global Marketing Plan 2019
† Destination Canada's Global Tourism Watch (2017)

‡ IATA SRS Analyzer Data, August 2018 (Provided by Destination Canada)
◊ Destination BC tabulations from the 2014 International Travel Survey (Statistics Canada)
§ OECD
†† Bank of Canada

[1] Destination BC Internal Estimates
[2] Google InVITE Travel Search Queries
[3] Phocuswright
[4] Destination Canada's EQ Research (2012)
[5] Statistics Canada; Prepared by Destination BC