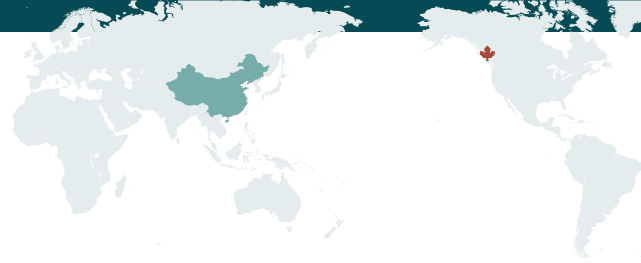




MARKET PROFILES CHINA

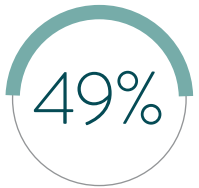


DESTINATION
BRITISH COLUMBIA™

MARKET OVERVIEW



MARKET
POTENTIAL[‡]



Likelihood to visit BC
in the next 2 years

POTENTIAL DEMAND[†]

5,323M

BC RANK**

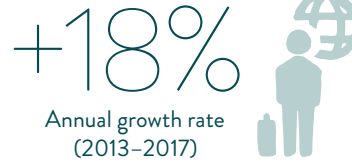
China is the
2nd
largest international
market for BC

MARKET STATUS***

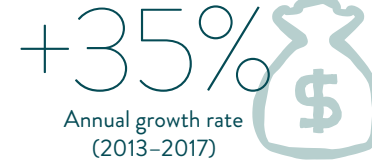
Invest for growth

BC PAST PERFORMANCE

VISITATION^[1]



EXPENDITURES^[1]



NET PROMOTER
SCORE[†]



Promoters 34%
Passives 49%
Detractors 17%

AIRLINE SEAT
CAPACITY[†]



MARKET INSIGHTS



2018 was designated the Canada-China Year of Tourism, a corporate agreement between the two governments.



Thirteen gateway cities in Mainland China have direct flights to Vancouver.



China is the largest Asia/Pacific market for BC. China accounted for 29% of BC's total visitation from Asia/Pacific.**



Almost all Chinese travellers use a travel agent to plan and book their trip.†

SHORT-TERM FORECAST (2019)

FORECAST VISITATION TO BC^[1]

356,000



FORECAST EXPENDITURES TO BC^[1]

\$686M



AIRLINE SEAT
CAPACITY[†]



GDP
GROWTH[§]

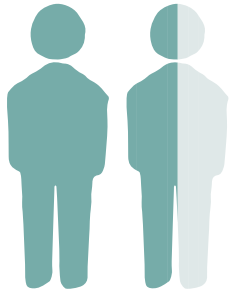


COST OF
\$1 CDN DOLLAR[¶]



TRAVELLER CHARACTERISTICS

TRAVEL PARTY**



1.5

TOP 3 EQ TYPES^[3]

- Virtual Travellers
- Cultural History Buffs
- Personal History Explorers

PAST VISITATION TO CANADA[†]



SPENDING**

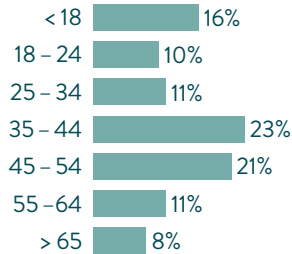


AVERAGE TRIP LENGTH IN BC**

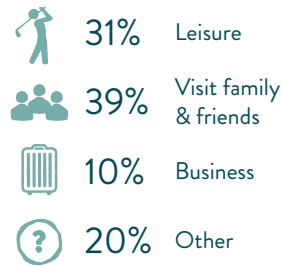
27.6 Nights



AGE**



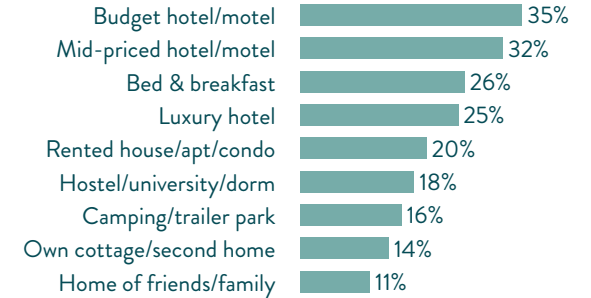
TRIP PURPOSE**



TOP 5 ACTIVITIES[†]

- Natural attractions like mountains or waterfalls
- Trying local food and drink
- Historical archaeological or world heritage sites
- Fishing or hunting
- Amusement or theme parks

ACCOMMODATIONS[†]

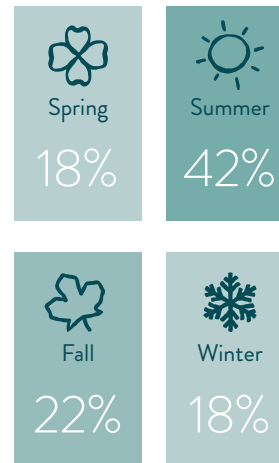


TRAVEL AGENT/TOUR OPERATOR USAGE[†]

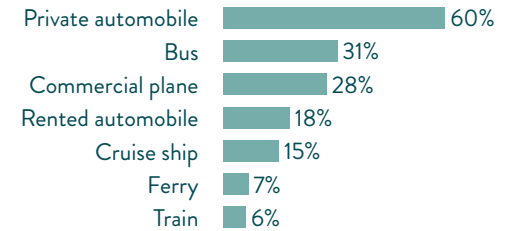
- Flights
- Accommodations
- Transportation
- Activities
- Other

RESEARCHING	40%	43%	39%	38%	30% Potential travel destinations
	40%	29%	31%	16%	
BOOKING	40%	29%	31%	16%	4% Did not use a travel agent

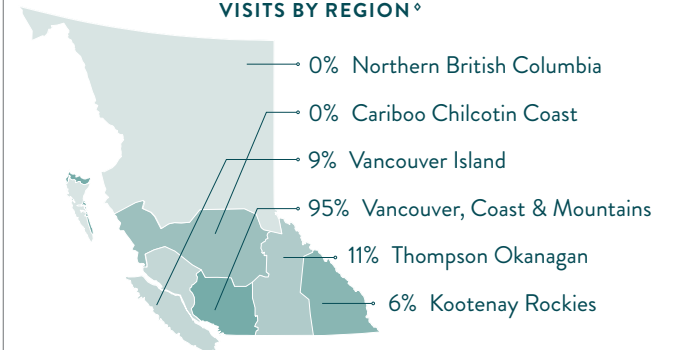
TRAVEL SEASONS^[4]



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] Phocuswright
 [3] Destination Canada's EQ Research (2012)
 [4] Statistics Canada; Prepared by Destination BC