



MARKET PROFILES
GERMANY



DESTINATION
BRITISH COLUMBIA™

MARKET OVERVIEW



<p>MARKET POTENTIAL[†]</p> <p>52%</p> <p>Likelihood to visit BC in the next 2 years</p>	<p>POTENTIAL DEMAND[†]</p> <p>2,656M</p>	<p>BC RANK**</p> <p>Germany is the 5th largest international market for BC</p>
<p>MARKET STATUS***</p> <p>Maintain our strength</p>		

MARKET INSIGHTS

- The German economy continues to perform well despite Europe's ongoing economic challenges.
- Unemployment in Germany continues to be at a record low.
- Germany's gross global travel bookings have remained relatively flat over the last two years, at \$85B.^[3]
- #2** Germany was the second-largest European market for BC. Germany accounted for 19% of BC's total visitation from Europe.**

BC PAST PERFORMANCE

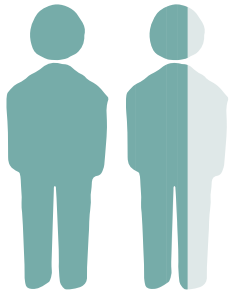
<p>VISITATION^[1]</p> <p>+6%</p> <p>Annual growth rate (2013-2017)</p> <p>45%**</p> <p>BC's share of Canadian German visitation</p>	<p>EXPENDITURES^[1]</p> <p>+11%**</p> <p>Annual growth rate (2013-2017)</p> <p>40%**</p> <p>BC's share of Canadian German expenditures</p>	<p>NET PROMOTER SCORE[†]</p> <p>22</p> <p>Promoters 43% Passives 36% Detractors 21%</p> <p>AIRLINE SEAT CAPACITY[‡]</p> <p>+8%</p>
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SHORT-TERM FORECAST (2019)

<p>FORECAST VISITATION TO BC^[1]</p> <p>133,000</p> <p>+4%</p>	<p>FORECAST EXPENDITURES TO BC^[1]</p> <p>\$221.1M</p> <p>+6%</p>		
<p>AIRLINE SEAT CAPACITY[‡]</p> <p>0%</p>	<p>BC TRAVEL SEARCH QUERIES^[2]</p> <p>+9%</p>	<p>GDP GROWTH[§]</p> <p>+2%</p>	<p>COST OF \$1 CDN DOLLAR[¶]</p> <p>€ 0.66 EURO (-1%)</p>

TRAVELLER CHARACTERISTICS

TRAVEL PARTY**

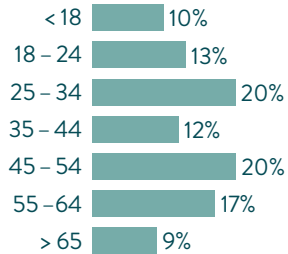


1.6

TOP 3 EQ TYPES^[4]

Cultural Explorers
Virtual Travellers
Group Tourists & Rejuvenators

AGE**



PAST VISITATION TO CANADA[†]



SPENDING**

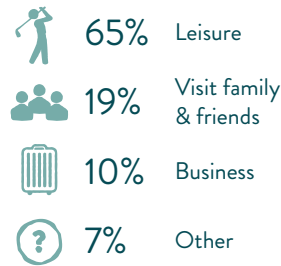


AVERAGE TRIP LENGTH IN BC**

13.7 Nights



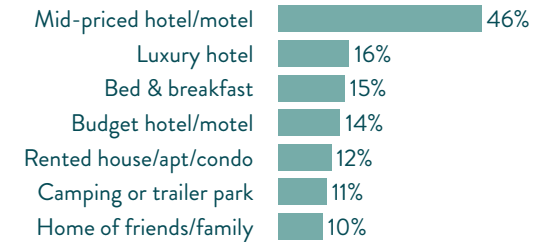
TRIP PURPOSE**



TOP 5 ACTIVITIES[†]



ACCOMMODATIONS[†]

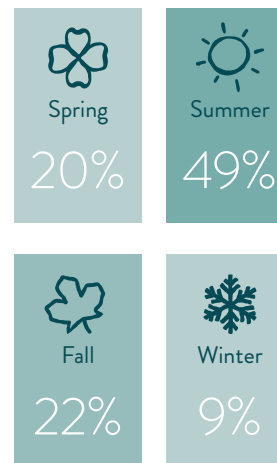


TRAVEL AGENT/TOUR OPERATOR USAGE[†]

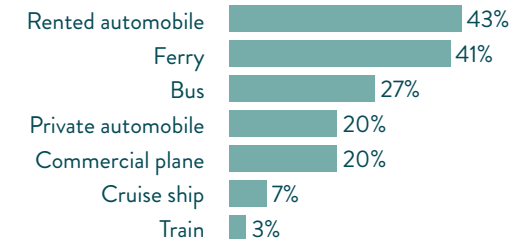


RESEARCHING	27%	22%	10%	20%	17% Potential travel destinations
	29%	21%	13%	11%	
BOOKING					40% Did not use a travel agent

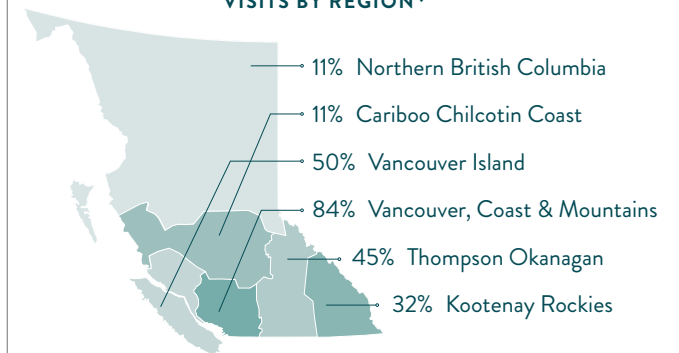
TRAVEL SEASONS^[5]



TRANSPORTATION USED DURING TRIP**



VISITS BY REGION[◇]



TRAVEL BOOKINGS^[3]

