



MARKET PROFILES
JAPAN



DESTINATION
BRITISH COLUMBIA™

MARKET OVERVIEW



<p>MARKET POTENTIAL†</p> <p>63%</p> <p>Likelihood to visit BC in the next 2 years</p>	<p>POTENTIAL DEMAND†</p> <p>1,597M</p>	<p>BC RANK**</p> <p>Japan is the 6th largest international market for BC</p>
<p>MARKET STATUS***</p> <p>Respond and monitor</p>		

BC PAST PERFORMANCE

<p>VISITATION [1]</p> <p>+10%</p> <p>Annual growth rate (2013-2017)</p> <p>46%**</p> <p>BC's share of Canadian Japanese visitation</p>	<p>EXPENDITURES [1]</p> <p>+32%</p> <p>Annual growth rate (2013-2017)</p> <p>37%**</p> <p>BC's share of Canadian Japanese expenditures</p>	<p>NET PROMOTER SCORE†</p> <p>-16</p> <p>Promoters 22% Passives 41% Detractors 38%</p>
<p>AIRLINE SEAT CAPACITY†</p> <p>-2%</p>		

MARKET INSIGHTS

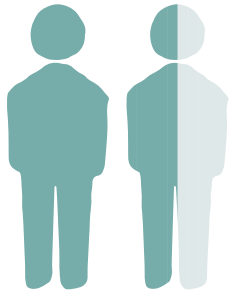
- Recent legislation in Japan has created more opportunity for leisure time, allowing for more long-haul holiday trips.
- BC has captured the largest share of Japanese visits among all Canadian provinces.**
- Millennials and 55+ constituted the largest holiday segment arriving to Canada from Japan.[6]
- #3** Japan was the third-largest Asia/Pacific market for BC. Japan accounted for 12% of BC's total visitation from Asia/Pacific.**

SHORT-TERM FORECAST (2019)

<p>FORECAST VISITATION TO BC [1]</p> <p>112,000</p> <p>+1%</p>	<p>FORECAST EXPENDITURES TO BC [1]</p> <p>\$204.2M</p> <p>+2%</p>		
<p>AIRLINE SEAT CAPACITY†</p> <p>+1%</p>	<p>BC TRAVEL SEARCH QUERIES [2]</p> <p>+7%</p>	<p>GDP GROWTH§</p> <p>+1%</p>	<p>COST OF \$1 CDN DOLLAR [1]</p> <p>¥87.09 YEN (-2%)</p>

TRAVELLER CHARACTERISTICS

TRAVEL PARTY**



1.5

TOP 3 EQ TYPES^[4]

- Virtual Travellers
- Cultural History Buffs
- Personal History Explorers

PAST VISITATION TO CANADA[†]



SPENDING**

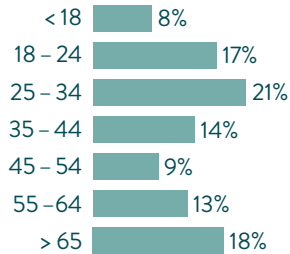


AVERAGE TRIP LENGTH IN BC**

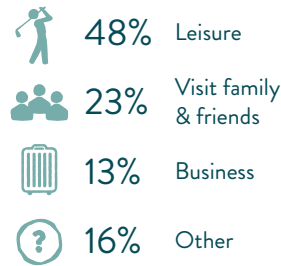
14.1 Nights



AGE**



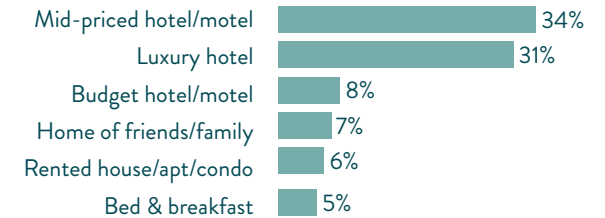
TRIP PURPOSE**



TOP 5 ACTIVITIES[†]

- City green spaces like parks or gardens
- Natural attractions like mountains or waterfalls
- Nature parks
- Trying local food and drink
- Hiking or walking in nature

ACCOMMODATIONS[†]

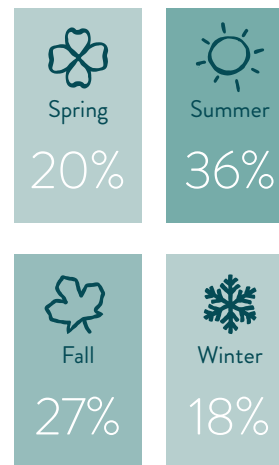


TRAVEL AGENT/TOUR OPERATOR USAGE[†]

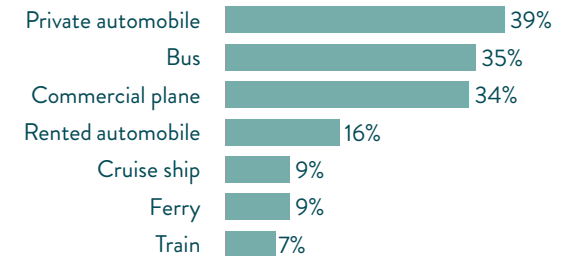
- Flights
- Accommodations
- Transportation
- Activities
- Other

RESEARCHING	33%	41%	14%	24%	38% Potential travel destinations
	43%	35%	18%	16%	
BOOKING					

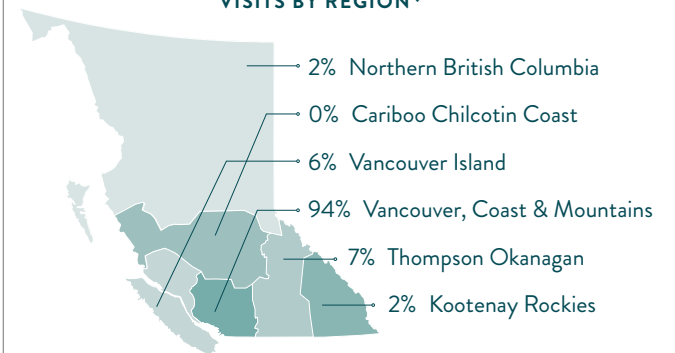
TRAVEL SEASONS^[5]



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
 [6] Destination Canada