



MARKET PROFILES

Australia

NOVEMBER 2021

The 2021 International Market Profiles contain the latest information and highlights on Destination BC’s key international markets. This publication summarizes each market, pre-COVID (2019), including the size of the market, volume and expenditures in BC, and traveller and trip characteristics. The latest market highlights and factors impacting and helping recovery of the markets as a result of COVID are also included. Highlights and factors are ever-changing—as such, those available here are time-stamped from the date of publication.

Market Overview

2019 Overnight Outbound Departures from Australia\*

11,619,250

Change in overnight departures from 2018 +1.8%

2019 Market Visitation Rank ††

#4

Australia was the 4th largest international market for BC in 2019

2021 Market Status§

Monitor

2020 Market Potential†

65%

Likelihood to visit BC in the next 2 years

1.54 M

2020 Potential Demand†

BC Past Performance

2019 Reported Visitation††



201,000

36.9%

BC’s Share of 2019 Canadian Australian Visitation††

2019 Reported Expenditure††

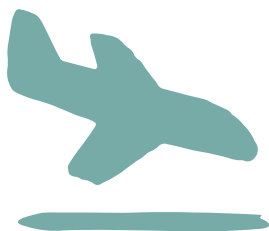


\$363.7 M

53.9%

BC’s Share of 2019 Canadian Australian Expenditures††

2019 Airline Seat Capacity◊



+8.8%

2019 BC Travel Search Queries△



+4%

Change from 2018

Factors Impacting/Helping Recovery

British Columbian’s Comfort Welcoming International Visitors††

19%

Of BC residents are comfortable welcoming international visitors to their community



Willingness to Receive Vaccine#

84%

Support for Vaccine Passports for International Travel\*\*

86%



Likelihood to Travel Internationally◊

27%

In the next 12 months

Market Highlights



Fully vaccinated Australian citizens and permanent residents no longer require an exemption to travel overseas and will have reduced quarantine requirements on returning to Australia. Restrictions vary on a state-to-state basis.ΣΣ



Interest in overseas travel is returning, with 22% of Australians intending to travel internationally within the next 1–2 years.≈≈



As of November 1st, 2021, 78% of Australians over age 16 are fully vaccinated.ΣΣ



Qantas is responding to the demand from Australian travellers, and expediting its reopening of international flights, with year-round flights to Vancouver scheduled to recommence in December 2021.ΠΠ



SOURCES



MARKET PROFILES

Australia

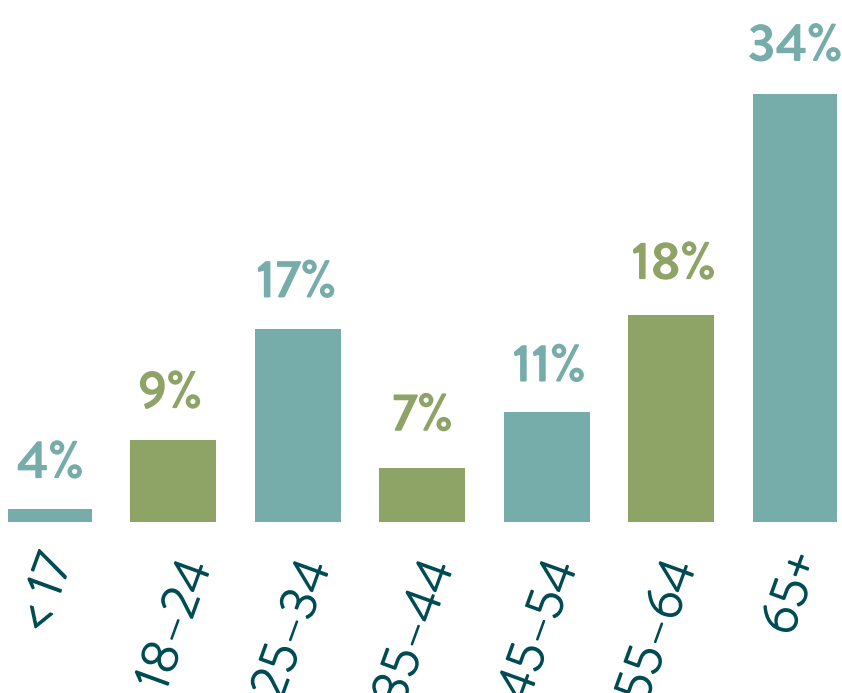
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Traveller and Trip Characteristics

Average Travel Party Size<sup>Ω</sup>



Age<sup>Ω</sup>



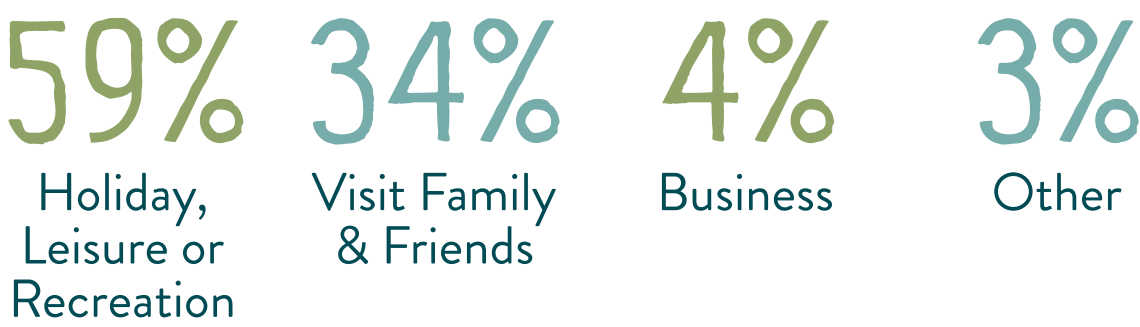
Top 3 EQ Types<sup>Σ</sup>

- Social Samplers
- Cultural Explorers
- No Hassle Travellers

Past Visitation to Canada<sup>†</sup>

33%

Trip Purpose<sup>Ω</sup>



Top 5 Activities<sup>Σ</sup>

- Sampling local cuisine
- Natural attractions
- Viewing wildlife or marine life
- Hiking or walking in nature
- Shopping

Average Spending Per Person in BC<sup>Σ</sup>

\$1,814

Average Trip Length in BC<sup>††</sup>

12.4 Nights



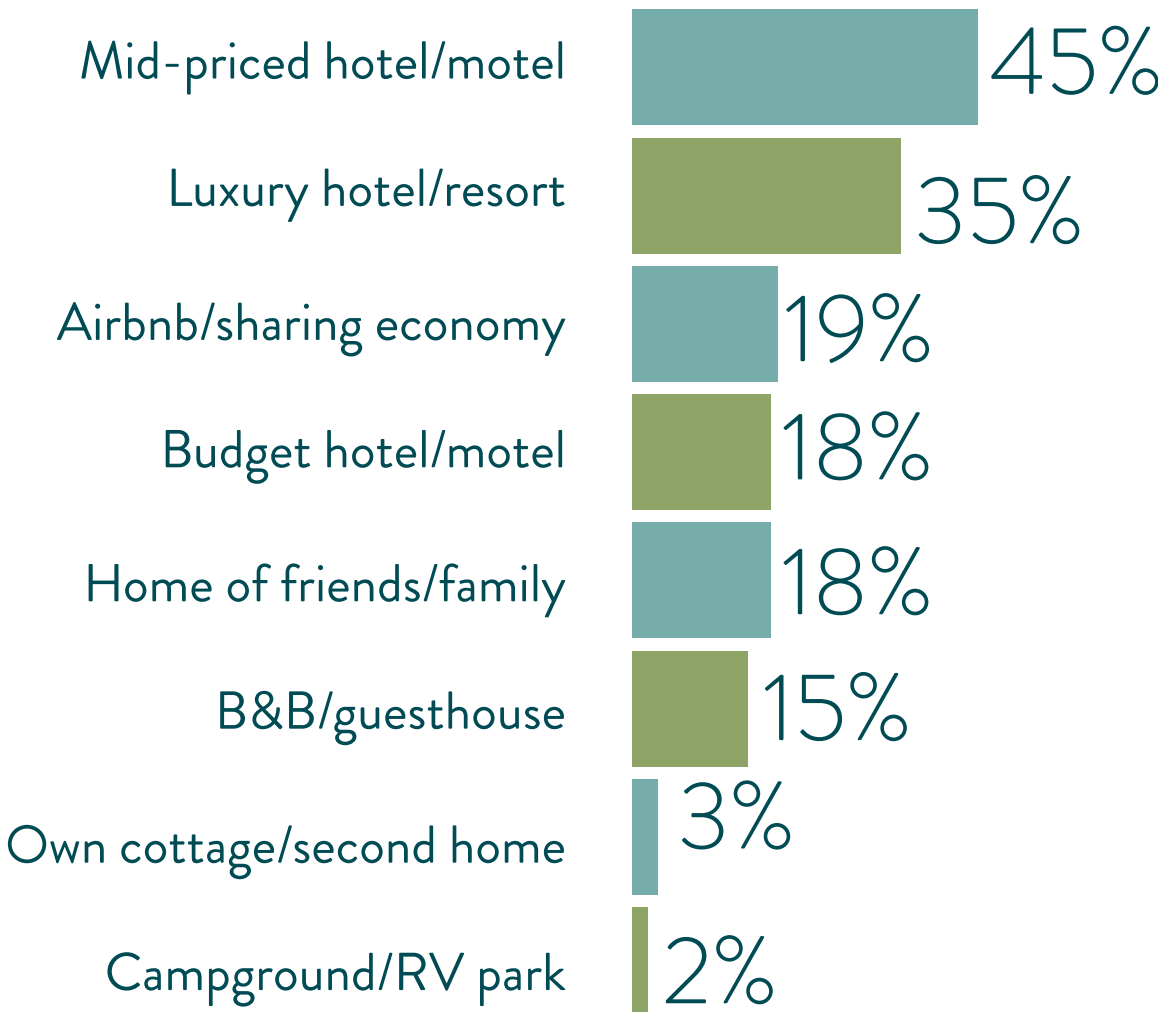
Travel Seasons<sup>Ω</sup>



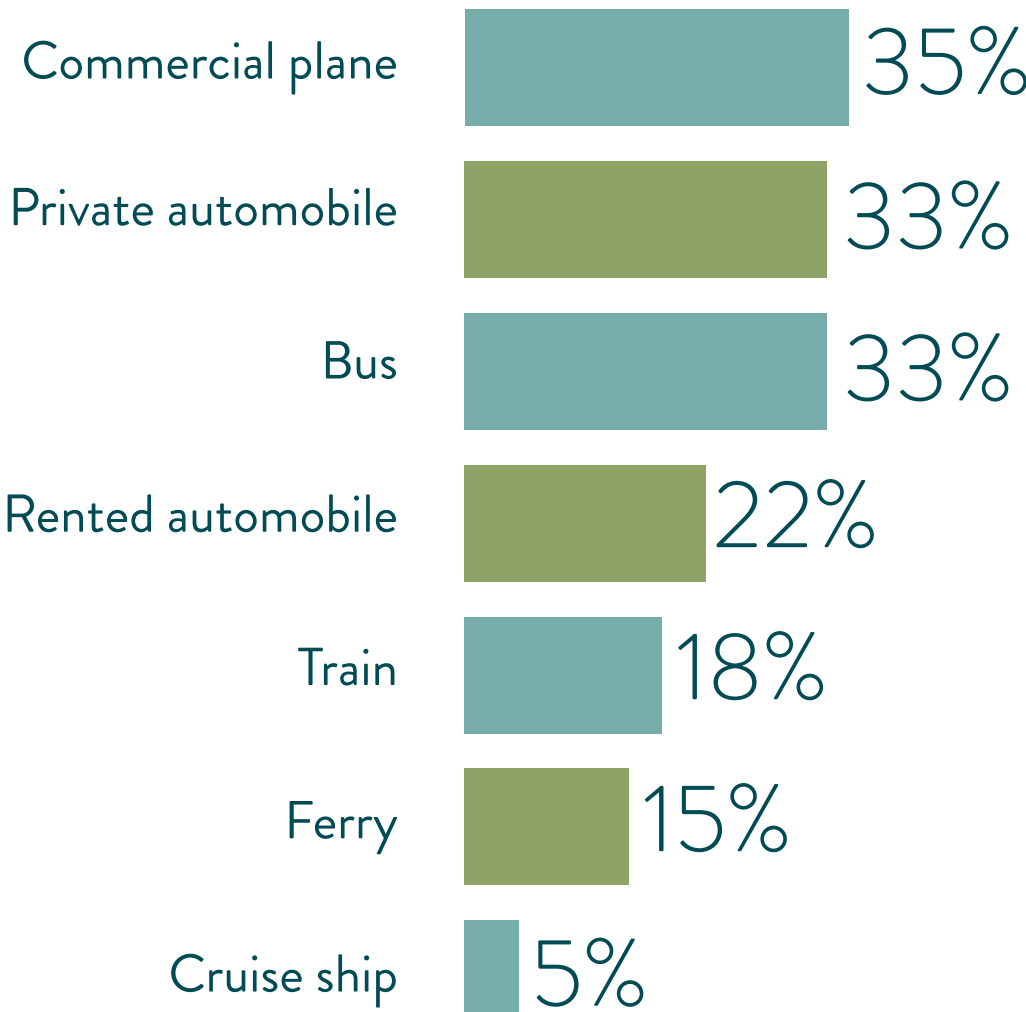
Travel Agent/Tour Operator Usage<sup>Σ</sup>

	Researching	Booking
Flights	29%	47%
Accommodations	22%	34%
Transportation	18%	27%
Activities	17%	22%
Potential Travel Destinations	19%	
18% Did not use a travel agent		

Accommodations<sup>Σ</sup>



Transportation Used During Trip<sup>Ω</sup>



Travel Bookings<sup>Π</sup>



50% Offline



50% Online



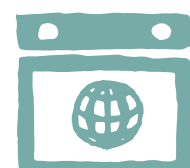
20% Mobile



80% Desktop



68% Online Supplier



32% Online Travel Agent





MARKET PROFILES

# China

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## Market Overview

2019 Overnight Outbound Departures from China\*

73,844,800

Change in overnight departures from 2018 +5.2%

2019 Market Visitation Rank ††

#2 China was the 2nd largest international market for BC in 2019

2021 Market Status§

Monitor

2020 Market Potential†

63%

Likelihood to visit BC in the next 2 years

5.38 M

2020 Potential Demand†

## BC Past Performance

2019 Reported Visitation††



290,000

33.7% BC’s Share of 2019 Canadian Chinese Visitation††

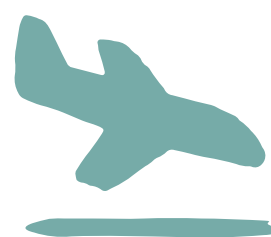
2019 Reported Expenditure††



\$586.9 M

39.6% BC’s Share of 2019 Canadian Chinese Expenditures††

Airline Seat Capacity◊



-4.5%

## Factors Impacting/Helping Recovery

British Columbian’s Comfort Welcoming International Visitors††

19%

Of BC residents are comfortable welcoming international visitors to their community



Willingness to Receive Vaccine#

99%

Support for Vaccine Passports for International Travel\*\*

83%



Likelihood to Travel Internationally◊

52%

In the next 12 months

## Market Highlights



While pent up demand for travel is high in China, strict COVID-19 border control measures will limit outbound visitation, with a 14-day hotel quarantine required for all international arrivals.



As of November 1st, 2021, almost 50% of Chinese air-bookings to BC occur within 30-days of travel, an increase of 9% during this booking window compared with 2019.◊



International travel may resume in 2022, provided that China meets its vaccination target of 85%.◊◊



As of October 29th, 2021, 74% of Chinese are fully vaccinated.◊◊



Between 2019 and 2021, online bookings have risen 8%, with 63% of all travel bookings now occurring online.†

SOURCES

- \* Tourism Economics (2019)
- † Destination Canada’s Global Tourism Watch (2020)
- ‡ Destination BC Internal Estimates
- § Destination BC Global Marketing Plan 2021
- †† Destination BC’s BC Residents’ Perceptions: COVID-19 Travel and Tourism (September 2021)

- # Morning Consult’s Weekly Global Vaccine Tracking Survey (September 2021)
- ◊ Brand USA’s International Travel & Consumer Sentiment Survey (June 2021)
- †† Destination BC Tabulations from the 2019 Visitor Travel Survey (Statistics Canada)
- \*\* Ipsos Global Views on Personal Health Data and Vaccine Passports Survey, (April 2021)
- ◊◊ Our World in Data (November 2021)

- † Phocuswright (2019)
- ◊◊ SCMP News (October 2021)

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China

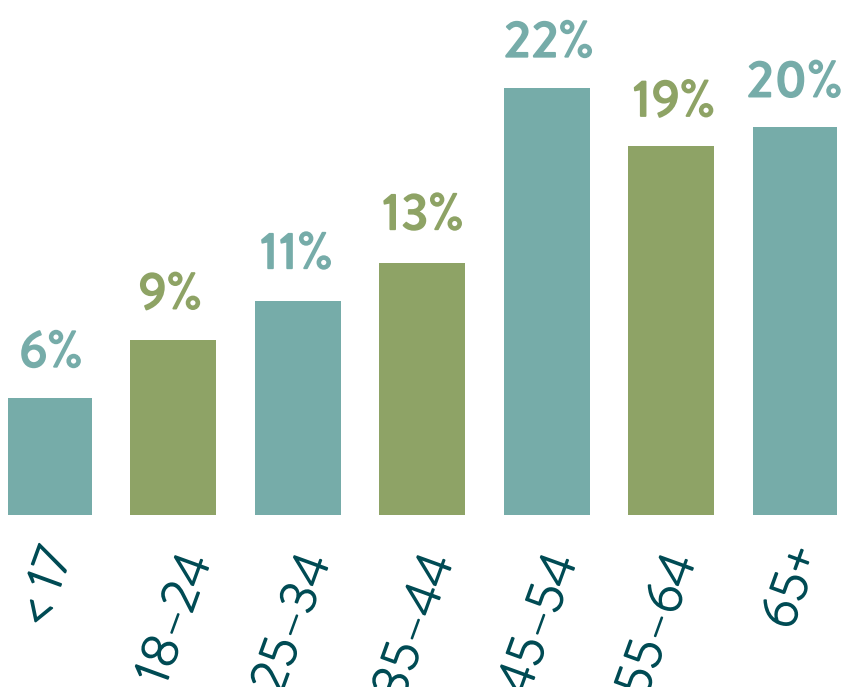
NOVEMBER 2021

Traveller and Trip Characteristics

Average Travel Party Size<sup>Ω</sup>



Age<sup>Ω</sup>



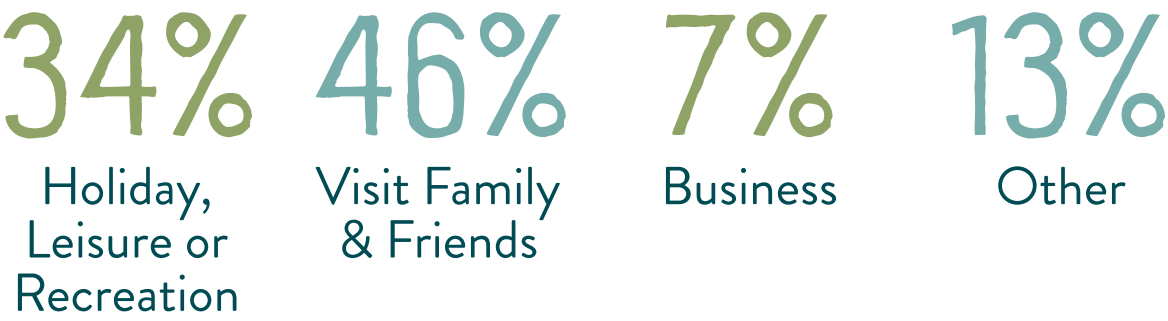
Top 3 EQ Types<sup>Σ</sup>

- Free Spirits
- Aspiring Escapists
- Gentle Explorers

Past Visitation to Canada<sup>†</sup>

22%

Trip Purpose<sup>Ω</sup>



Top 5 Activities<sup>Σ</sup>

- Sampling local cuisine
- Natural attractions
- Amusement or theme parks
- Exploring Indigenous culture
- Heritage and history

Average Spending Per Person in BC<sup>Σ</sup>

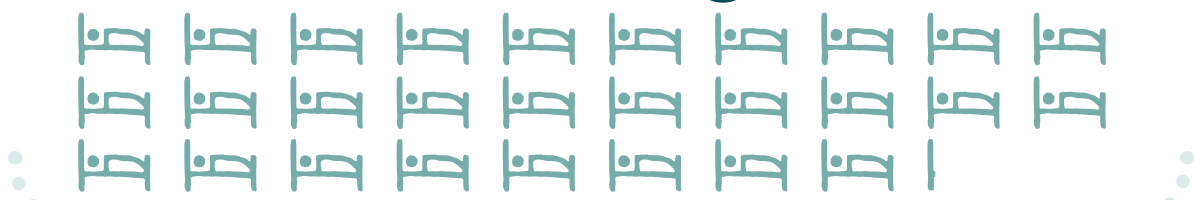
\$2,021

Travel Agent/Tour Operator Usage<sup>Σ</sup>

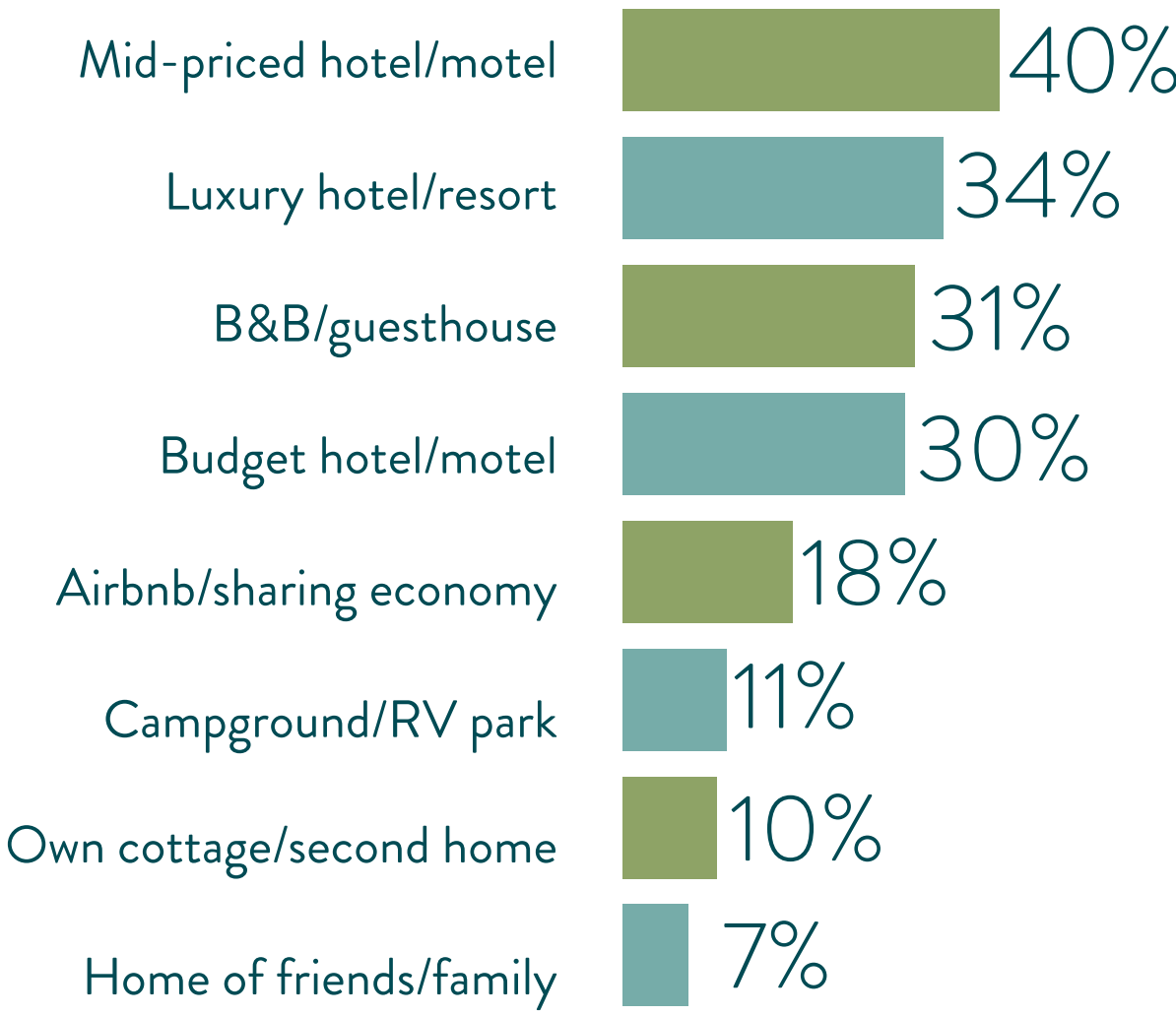
	Researching	Booking
Flights	56%	53%
Accommodations	59%	52%
Transportation	40%	30%
Activities	45%	31%
Potential Travel Destinations	44%	
4% Did not use a travel agent		

Average Trip Length in BC<sup>††</sup>

28.1 Nights



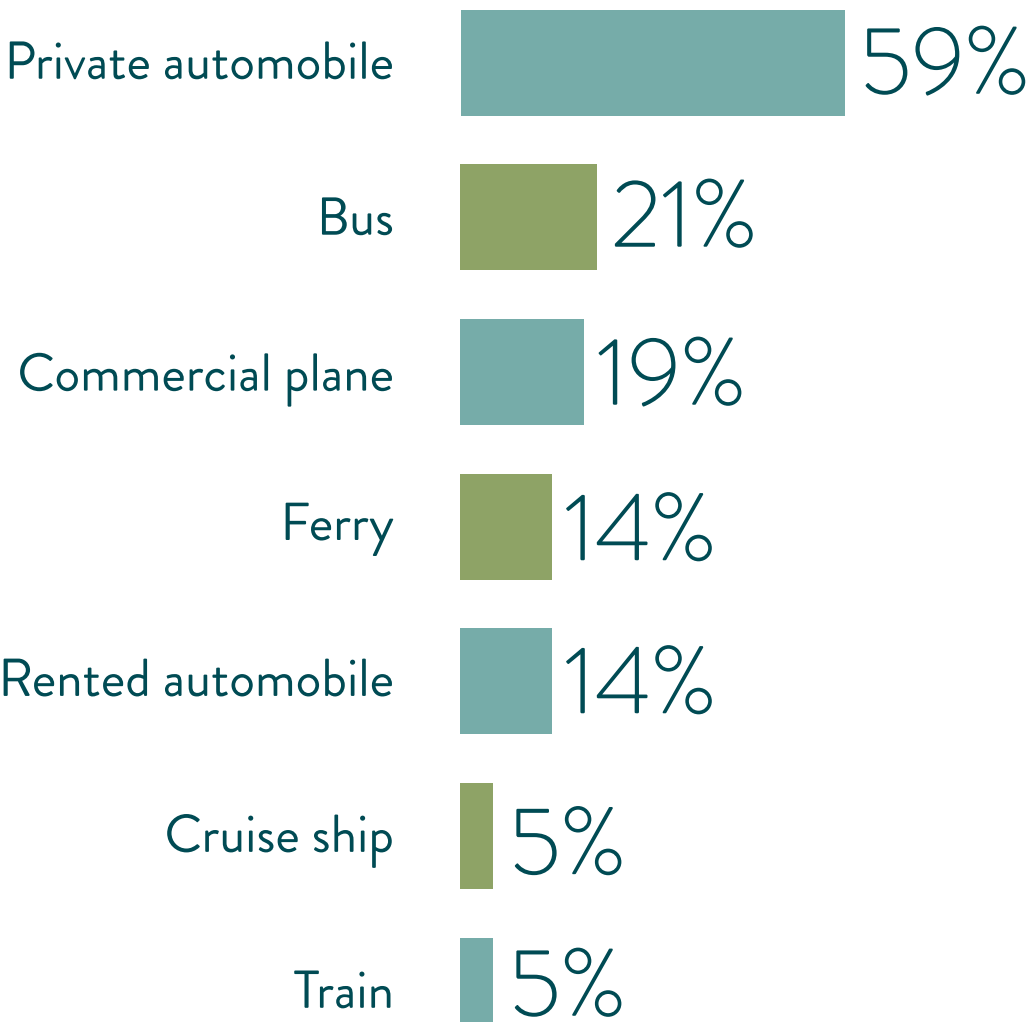
Accommodations<sup>Σ</sup>



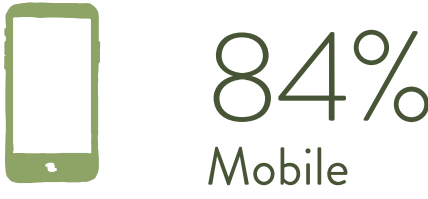
Travel Seasons<sup>Ω</sup>



Transportation Used During Trip<sup>Ω</sup>



Travel Bookings<sup>Π</sup>





MARKET PROFILES  
Germany

NOVEMBER 2021

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Market Overview

2019 Overnight Outbound Departures from Germany\*

111,258,300

Change in overnight departures from 2018 +2.5%

2019 Market Visitation Rank ††

#5

Germany was the 5th largest international market for BC in 2019

2021 Market Status§

Monitor for Investment

2020 Market Potential†

50%

Likelihood to visit BC in the next 2 years

2.45 M

2020 Potential Demand†

BC Past Performance

2019 Reported Visitation††



140,000

23.5%

BC’s Share of 2019 Canadian German Visitation††

2019 Reported Expenditure††

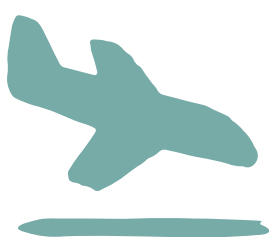


\$209.5M

35.1%

BC’s Share of 2019 Canadian German Expenditures††

Airline Seat Capacity◊



-4.5%

BC Travel Search Queries△



+5%

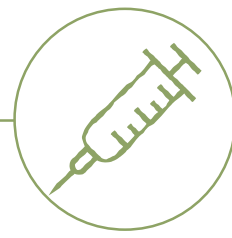
Change from 2018

Factors Impacting/Helping Recovery

British Columbian’s Comfort Welcoming International Visitors††

19%

Of BC residents are comfortable welcoming international visitors to their community



Willingness to Receive Vaccine#

82%

Support for Vaccine Passports for International Travel\*\*

73%



Likelihood to Travel Internationally◊

74%

In the next 12 months

Market Highlights



As of November 1st, 2021, 66% of Germans are fully vaccinated.◊◊



‘Early-bird’ travellers are increasingly deciding on their plans, but holding off booking until closer to the travel date.<sup>1</sup>



As of November 2021, 45% of all German air-bookings to BC were made within 44-days of arrival; this is a significant shift towards a shorter booking window compared with 2019. Historically, German travellers have favoured longer booking lead-times, with 50% of bookings in 2019 occurring more than 120-days before travel.◊



Travel via the US may be reduced, as it is considered a high-risk area requiring more stringent quarantine measures upon return to Germany. This may result in an increase in direct arrivals, however an overall net reduction in visitors may occur, as travellers flying into the US and travelling by land to Canada may decline.<sup>2</sup>

SOURCES

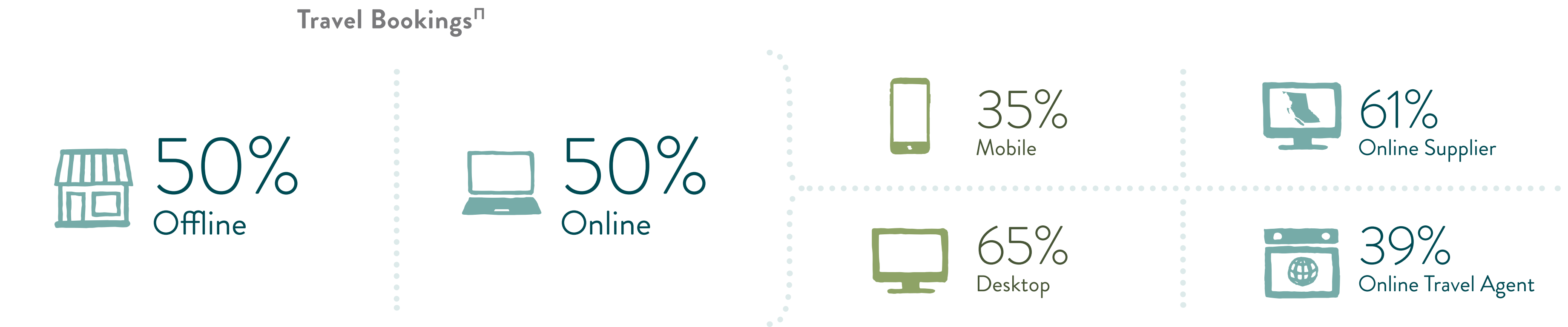
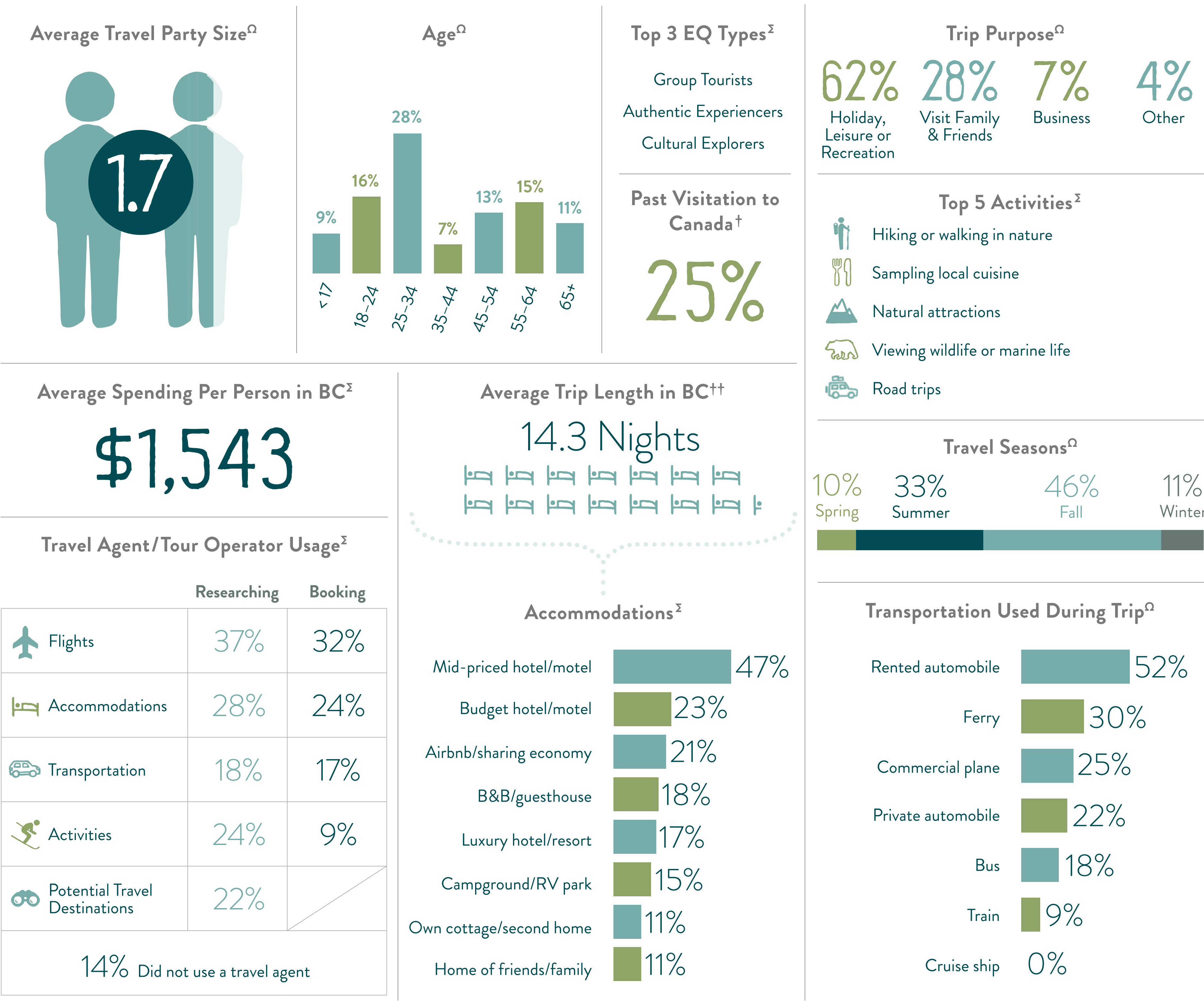
- \* Tourism Economics (2019)
- + Destination Canada’s Global Tourism Watch (2020)
- § Destination BC Global Marketing Plan 2021
- †† Destination BC’s BC Residents’ Perceptions: COVID-19 Travel and Tourism (September 2021)
- # Morning Consult’s Weekly Global Vaccine Tracking Survey (September 2021)

- ◊ Brand USA’s International Travel & Consumer Sentiment Survey (June 2021)
- ◊ Ipsos Global Views on Personal Health Data and Vaccine Passports Survey (April 2021)
- †† Destination BC Tabulations from the 2019 Visitor Travel Survey (Statistics Canada)
- †† Destination BC Tabulations from Statistics Canada Frontier Counts
- ◊ ForwardKeys (2019)
- △ Google InVITE Travel Search Queries (2019 vs 2018)

- ◊◊ Our World in Data (November 2021)
- 1 European Travel Commission (September 2021)
- 2 Federal Foreign Office (November 2021)

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Germany  
NOVEMBER 2021

Traveller and Trip Characteristics





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Japan

NOVEMBER 2021

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Market Overview

2019 Overnight Outbound Departures from Japan\*

18,954,000

Change in overnight departures from 2018 0.0%

2019 Market Visitation Rank ††

#8

Japan was the 8th largest international market for BC in 2019

2021 Market Status§

Future Monitor

2020 Market Potential†

56%

Likelihood to visit BC in the next 2 years

1.13 M

2020 Potential Demand†

BC Past Performance

2019 Reported Visitation††



201,000

36.4% BC’s Share of 2019 Canadian Japanese Visitation††

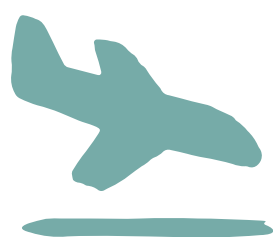
2019 Reported Expenditure††



\$363.7 M

41.0% BC’s Share of 2019 Canadian Japanese Expenditures††

Airline Seat Capacity◊



-4.5%

BC Travel Search Queries△



+2%

Change from 2018

Factors Impacting/Helping Recovery

British Columbian’s Comfort Welcoming International Visitors††

19%

Of BC residents are comfortable welcoming international visitors to their community



Willingness to Receive Vaccine#

87%

Support for Vaccine Passports for International Travel\*\*

74%



Likelihood to Travel Internationally◊

14%

In the next 12 months

Market Highlights



Japanese tourists are prioritizing being able to ‘travel safely and securely’ as the most important quality in an international trip.<sup>3</sup>



As of November 1st, 2021, 73% of Japanese are fully vaccinated.◊◊



In 2021, as of November 1st, 48% of all Japanese air-bookings to BC occurred less than a month before travel, with one-fifth of bookings occurring between 4-14 days before travel.◊



Japanese household savings hit a record high of ¥1.946 quadrillion at the end of March, 2021, resulting in an accumulation of discretionary savings that may be put towards future travel.<sup>4</sup>

SOURCES

- \* Tourism Economics (2019)
- + Destination Canada’s Global Tourism Watch (2020)
- § Destination BC Global Marketing Plan 2021
- †† Destination BC’s BC Residents’ Perceptions: COVID-19 Travel and Tourism (September 2021)
- △ Morning Consult’s Weekly Global Vaccine Tracking Survey (September 2021)

- ◊ Brand USA’s International Travel & Consumer Sentiment Survey (June 2021)
- \*\* Ipsos Global Views on Personal Health Data and Vaccine Passports Survey (April 2021)
- †† Destination BC Tabulations from the 2019 Visitor Travel Survey (Statistics Canada)
- †† Destination BC Tabulations from Statistics Canada Frontier Counts
- △ Google InVITE Travel Search Queries (2019 vs 2018)
- ◊ ForwardKeys (2019)

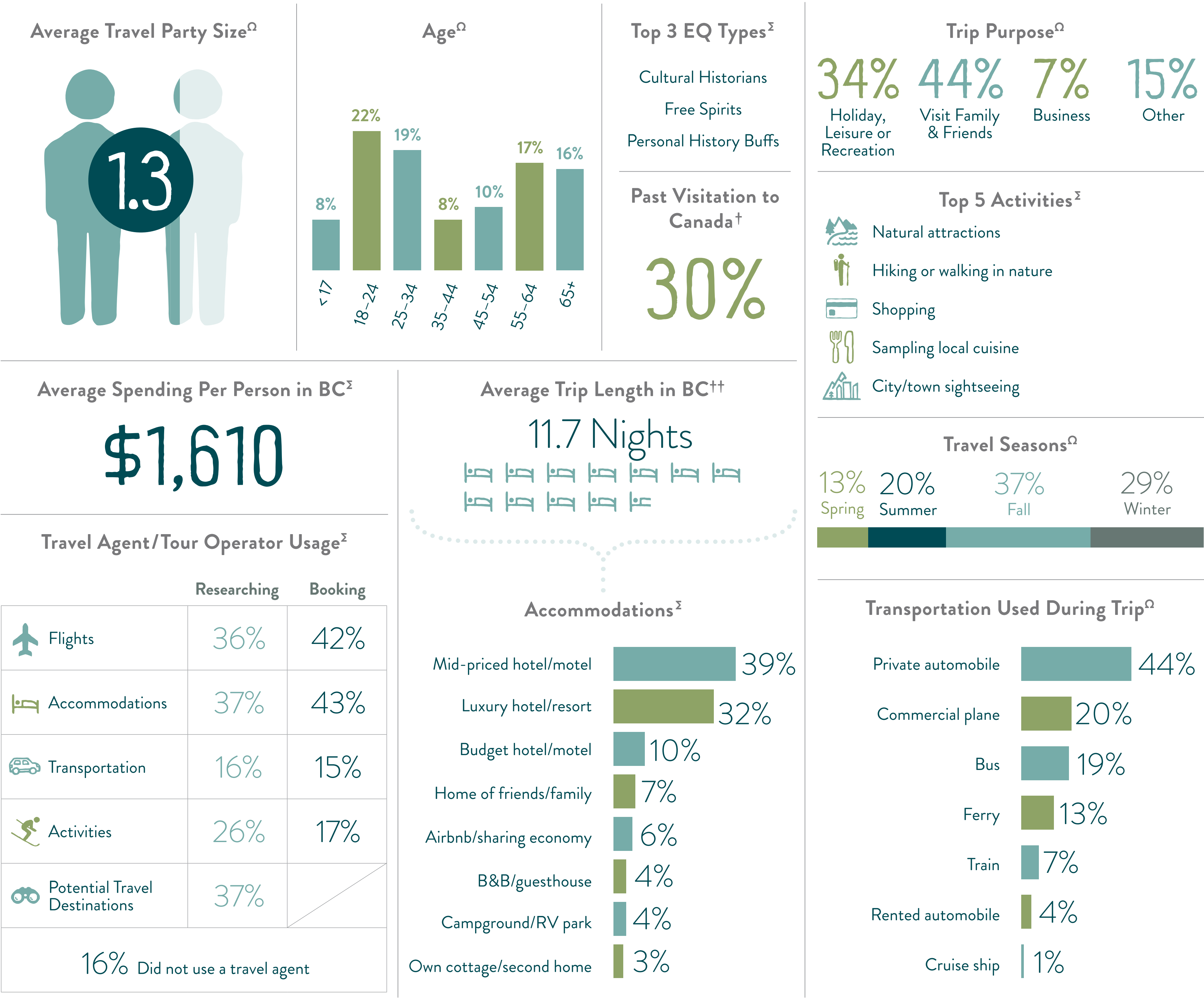
- ◊◊ Our World in Data (November 2021)
- 3 Survey of Future Overseas Travel Sentiment Among Japanese (April 2021)
- 4 The Japan Times (September 2021)

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Japan

NOVEMBER 2021

Traveller and Trip Characteristics



Travel Bookings<sup>Π</sup>





MARKET PROFILES

Mexico

NOVEMBER 2021

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Market Overview

2019 Overnight Outbound Departures from Mexico\*

19,673,620

Change in overnight departures from 2018 -0.4%

2019 Market Visitation Rank ††

#6

Mexico was the 6th largest international market for BC in 2019

2021 Market Status§

Monitor

2020 Market Potential†

42%

Likelihood to visit BC in the next 2 years

0.66 M

2020 Potential Demand†

BC Past Performance

2019 Reported Visitation††



201,000

25.2% BC’s Share of 2019 Canadian Mexican Visitation††

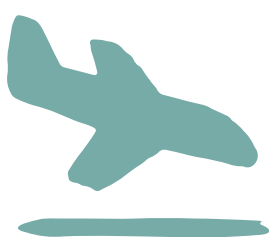
2019 Reported Expenditure††



\$363.7 M

40.1% BC’s Share of 2019 Canadian Mexican Expenditures††

Airline Seat Capacity◊



-4.5%

BC Travel Search Queries△



+6%

Change from 2018

Factors Impacting/Helping Recovery

British Columbian’s Comfort Welcoming International Visitors††

19%

Of BC residents are comfortable welcoming international visitors to their community



Willingness to Receive Vaccine#

93%

Support for Vaccine Passports for International Travel\*\*

86%



Likelihood to Travel Internationally◊

60%

In the next 12 months

Market Highlights



Demand for travel has increased, with a net increase of 25% of Mexican travellers planning to travel more than they did prior to COVID-19.5



Mexico does not require travellers to quarantine upon re-entry.6



As of November 1st, 2021, 47% of Mexicans are fully vaccinated.◊◊



Average booking lead times for air-travel has shortened, with 50% of 2021 air-bookings occurring within a month of travel, as of November 1st, 2021. This represents an increase of 13% compared with bookings during the same booking-window in 2019.◊

SOURCES

- \* Tourism Economics (2019)
- + Destination Canada’s Global Tourism Watch (2020)
- § Destination BC Global Marketing Plan 2021
- †† Destination BC’s BC Residents’ Perceptions: COVID-19 Travel and Tourism (September 2021)
- # Morning Consult’s Weekly Global Vaccine Tracking Survey (September 2021)

- ◊ Brand USA’s International Travel & Consumer Sentiment Survey (June 2021)
- \*\* Ipsos Global Views on Personal Health Data and Vaccine Passports Survey (April 2021)
- †† Destination BC Tabulations from the 2019 Visitor Travel Survey (Statistics Canada)
- ‡‡ Destination BC Tabulations from Statistics Canada Frontier Counts
- △ ForwardKeys (2019)
- △ Google InVITE Travel Search Queries (2019 vs 2018)

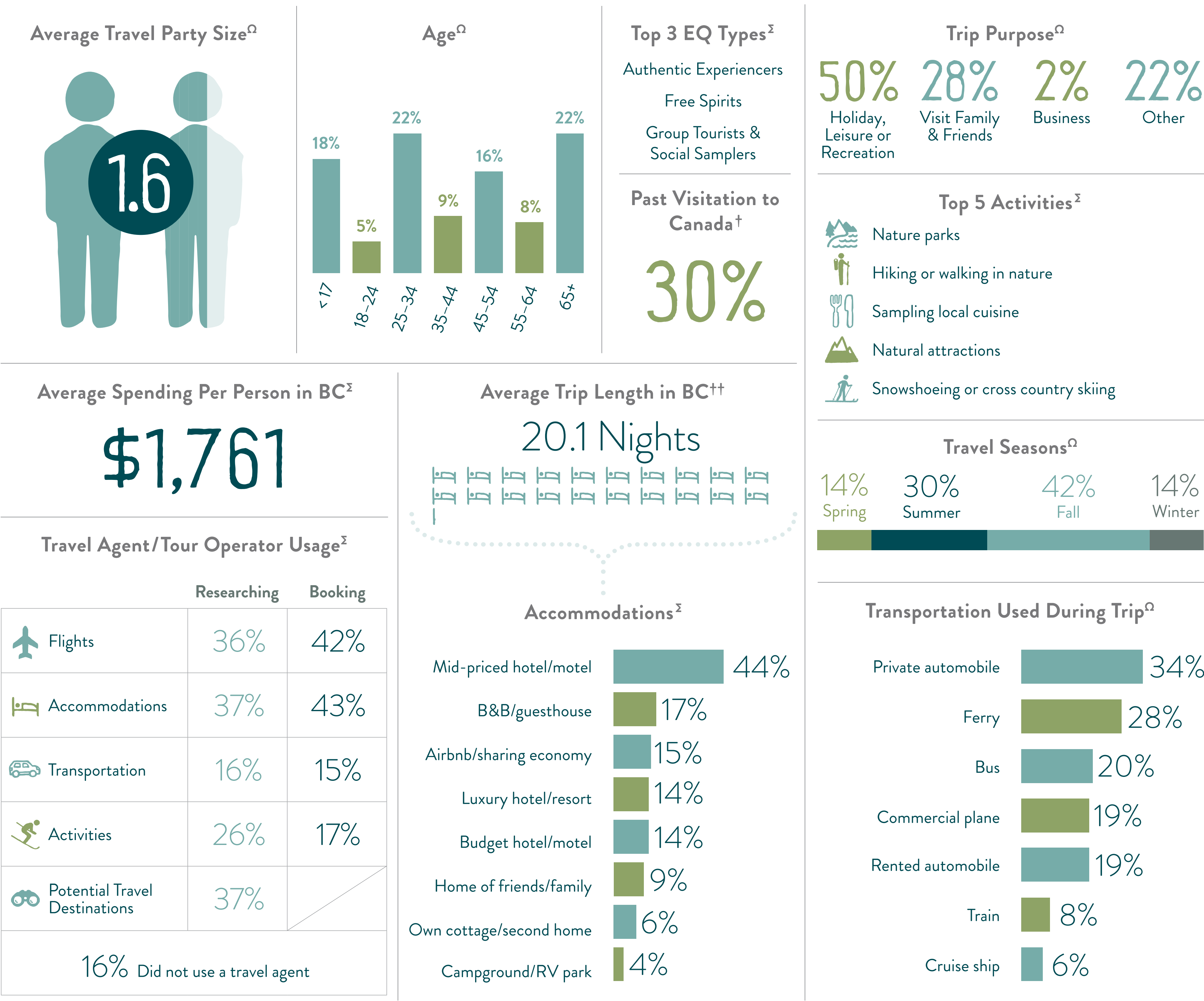
- ◊◊ Our World in Data (November 2021)
- 5 Siteminder (June 2021)
- 6 Secretaría de Relaciones Exteriores (November 2021)

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Mexico

NOVEMBER 2021

Traveller and Trip Characteristics



Travel Bookings<sup>Π</sup>





MARKET PROFILES

# South Korea

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Market Overview

2019 Overnight Outbound Departures from South Korea\*

26,828,570

Change in overnight departures from 2018 -0.4%

2019 Market Visitation Rank ††

#7

South Korea was the 7th largest international market for BC in 2019

2021 Market Status§

Future Monitor

2020 Market Potential†

49%

Likelihood to visit BC in the next 2 years

3.21 M

2020 Potential Demand†

BC Past Performance

2019 Reported Visitation††



128,000

42.8%

BC’s Share of 2019 Canadian South Korean Visitation††

2019 Reported Expenditure††

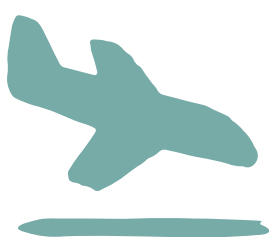


\$148.0 M

46.5%

BC’s Share of 2019 Canadian South Korean Expenditures††

Airline Seat Capacity◇



-4.5%

BC Travel Search Queries△



+10%

Change from 2018

Factors Impacting/Helping Recovery

British Columbian’s Comfort Welcoming International Visitors††

19%

Of BC residents are comfortable welcoming international visitors to their community



Willingness to Receive Vaccine#

88%

Support for Vaccine Passports for International Travel\*\*

84%



Likelihood to Travel Internationally∂

38%

In the next 12 months

Market Highlights



Travel bookings are increasingly moving towards online platforms, with 53% of South Koreans now booking travel online—a 9% increase from 2019 to 2021.†



The South Korean economy remained strong in 2020, due to a proactive COVID-19 management strategy, and is on a solid growth trajectory in 2021.7



As of November 1st, 2021, 76% of South Koreans are fully vaccinated.◇◇



South Koreans are booking their air travel closer to their departure dates in 2021, with 46% of all bookings occurring less than a month before travel. Compared with 2019, there is a significant shift towards earlier bookings, with a 20% decline in bookings occurring more than 60 days before travel.◇

SOURCES

- \* Tourism Economics (2019)
- † Destination Canada’s Global Tourism Watch (2020)
- § Destination BC Global Marketing Plan 2021
- †† Destination BC’s BC Residents’ Perceptions: COVID-19 Travel and Tourism (September 2021)
- # Morning Consult’s Weekly Global Vaccine Tracking Survey (September 2021)

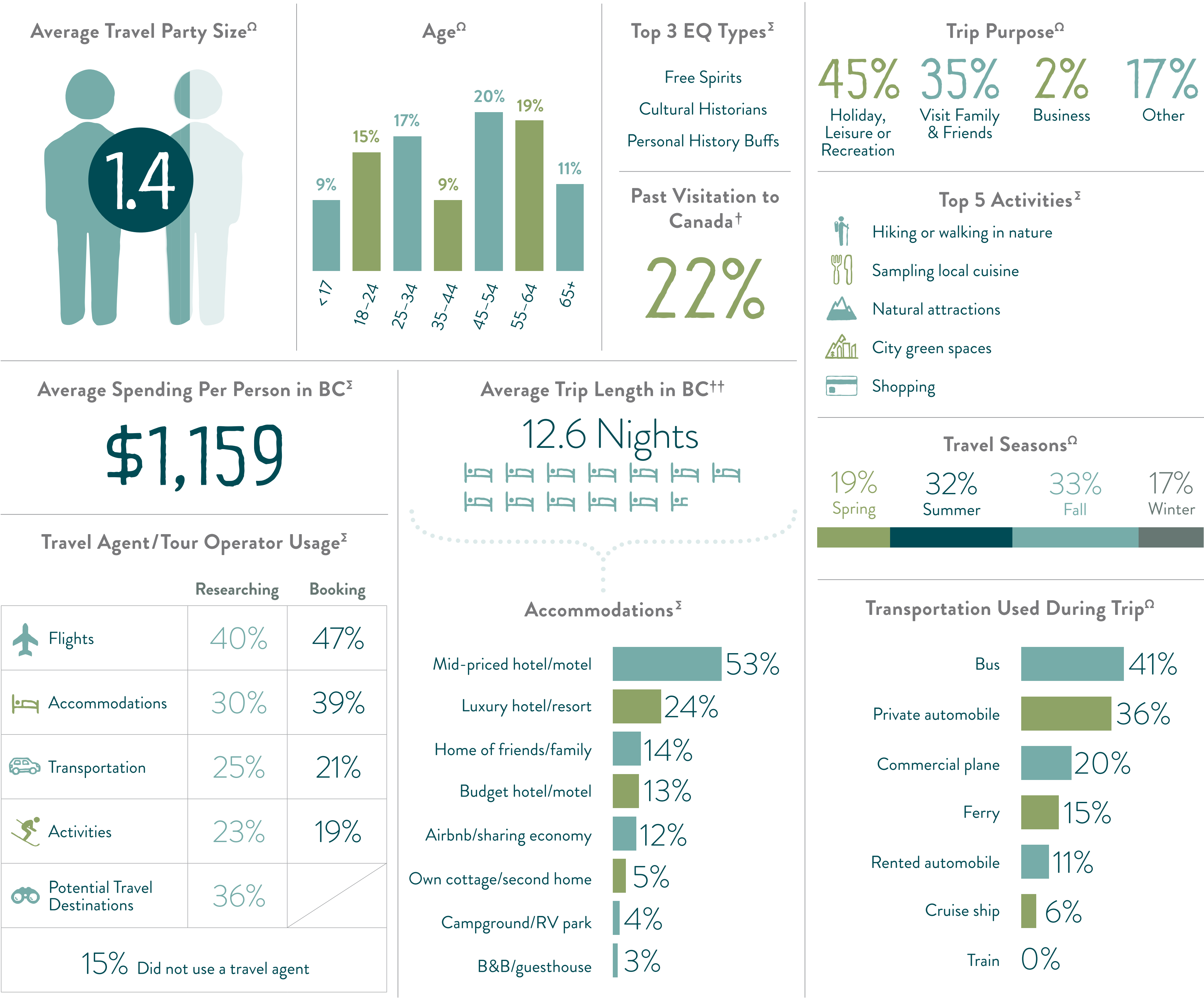
- ∂ Brand USA’s International Travel & Consumer Sentiment Survey (June 2021)
- \*\* Ipsos Global Views on Personal Health Data and Vaccine Passports Survey (April 2021)
- †† Destination BC Tabulations from the 2019 Visitor Travel Survey (Statistics Canada)
- ‡‡ Destination BC Tabulations from Statistics Canada Frontier Counts
- △ Google InVITE Travel Search Queries (2019 vs 2018)
- Phocuswright (2019)
- ◇ ForwardKeys (2019)
- ◇◇ Our World in Data (November 2021)
- 7 OECD (May 2021)

MARKET PROFILES

# South Korea

NOVEMBER 2021

## Traveller and Trip Characteristics



## Travel Bookings<sup>Π</sup>





MARKET PROFILES

# United Kingdom

NOVEMBER 2021

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## Market Overview

2019 Overnight Outbound Departures from the UK\*

71,481,400

Change in overnight departures from 2018 +1.5%

2019 Market Visitation Rank ††

#3

UK was the 3rd largest international market for BC in 2019

2021 Market Status§

Mid-term International

2020 Market Potential†

61%

Likelihood to visit BC in the next 2 years

3.09 M

2020 Potential Demand†

## BC Past Performance

2019 Reported Visitation††



289,000

25.0% BC’s Share of 2019 Canadian UK Visitation††

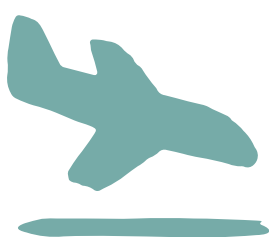
2019 Reported Expenditure††



\$396.3 M

34.2% BC’s Share of 2019 Canadian UK Expenditures††

Airline Seat Capacity◇



-4.5%

BC Travel Search Queries△



+9%

Change from 2018

## Factors Impacting/Helping Recovery

British Columbian’s Comfort Welcoming International Visitors††

19%

Of BC residents are comfortable welcoming international visitors to their community



Willingness to Receive Vaccine#

87%

Support for Vaccine Passports for International Travel\*\*

84%



Likelihood to Travel Internationally◇

49%

In the next 12 months

## Market Highlights



While planning lead times are in-line with normal, UK travel intenders are booking trips closer to their travel date.<sup>8</sup>



To date in 2021, travellers from the UK are booking air travel closer to their arrival date, with almost 40% of bookings to BC occurring within a month of their arrival date.<sup>◇</sup>



While COVID-19 has taken the front stage, the impacts of Brexit on outbound travel are not yet known, and will likely be a factor affecting post-COVID travel recovery.



As of November 1st, 2021, 67% of people in the UK are fully vaccinated.<sup>◇◇</sup>

### SOURCES

- \* Tourism Economics (2019)
- † Destination Canada’s Global Tourism Watch (2020)
- § Destination BC Global Marketing Plan 2021
- †† Destination BC’s BC Residents’ Perceptions: COVID-19 Travel and Tourism (September 2021)
- # Morning Consult’s Weekly Global Vaccine Tracking Survey (September 2021)

- ◇ Brand USA’s International Travel & Consumer Sentiment Survey (June 2021)
- \*\* Ipsos Global Views on Personal Health Data and Vaccine Passports Survey (April 2021)
- †† Destination BC Tabulations from the 2019 Visitor Travel Survey (Statistics Canada)
- †† Destination BC Tabulations from Statistics Canada Frontier Counts
- ◇ ForwardKeys (2019)
- △ Google InVITE Travel Search Queries (2019 vs 2018)

- ◇◇ Our World in Data (November 2021)
- 8 UK COVID-19 Consumer Sentiment Tracker (September 2021)

MARKET PROFILES

United Kingdom

NOVEMBER 2021

Traveller and Trip Characteristics

