



MARKET PROFILES

Australia

NOVEMBER 2023

The 2023 International Market Profiles contain the latest information and highlights on Destination BC’s key International markets (excluding US markets). This publication summarizes each target market, including the size of the market, volume and expenditures in BC, and traveller and trip characteristics. The latest market highlights and indicators of future travel are also included. Highlights and factors are ever-changing—as such, those available here are time-stamped from the date of publication.

Market Overview

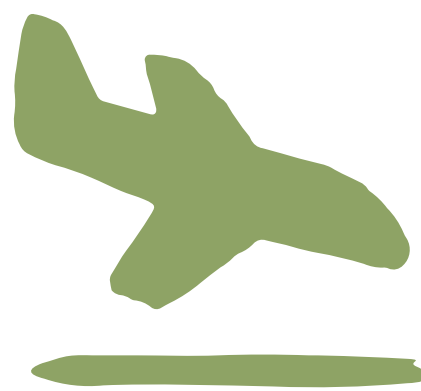
2022 Overnight Outbound Departures from Australia^Ω

6,191,830

Change in Overnight Departures From 2021 **1070.8%**

Future Travel Indicators

Air Capacity to BC in 2023[◇]



+45.1%

Change Over 2022

2022 Market Visitation Rank ^{††}

#3

Australia was the 3rd Largest International Market for BC in 2022

2023 Market Status[§]

Invest

2022 Market Potential

18%

Likelihood to Visit BC Within the Next 2 Years^{ΣΣ}

1.2M

2022 Potential Demand^π

BC Performance

2023 Estimated Visitation^{††}



179,000

10% Australia's Share of International Visitation in BC (excluding US)

231,000 2024 Forecasted Visitation

2023 Estimated Expenditure^{††}



\$351.1M

11% Australia's Share of International Expenditures in BC (excluding US)

\$468.8M 2024 Forecasted Expenditures

2022 BC Travel Search Queries^Δ



+114%

Change Over 2021

Market Highlights



Visitation from Australia is forecasted to recover to pre-pandemic levels in 2025, exceeding 2019 visitation by +15%.[€]



A large majority of travellers from Australia utilize travel agents, with this number expected to grow for post-COVID travel.^{**}



Australian travellers are committed to their international holiday spending, with most planning to spend over AUD \$10,000 (CA \$8,937). Despite cost of living pressures, 58% have unchanged travel plans, 60% are willing to invest more in experiences, and 55% prioritize saving for travel. Travel ranks as the top discretionary expense for Australians in 2023.[€]



In the period from January to June 2024, Australia is projected to see a robust increase in air capacity of 15% compared to the same period in 2023. This increase signals reinforcement of travel intent to British Columbia.[◇]



Key motivators for Australian travellers choosing Canada include safety, a longstanding desire to visit, and engage in outdoor experiences. The primary barriers are cost and travel distance, with both concerns being more significant for those aged 55 and above.[¶]



Over 50% of Australian travellers are mindful of their travel’s personal impact on destinations, with many willing to invest more in responsible travel options. Despite this, a smaller proportion considers this availability in Canada as a decisive factor.[¶]



Australians are eager to resume international travel, bolstered by a strong economy.



SOURCES

π Destination Canada's Global Tourism Watch (2021)
ΣΣ Destination Canada's Global Tourism Watch (Pooled 2020–2021)
§ Destination BC's Global Marketing Plan (2023)
†† Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2023)
¶ Destination BC's Public Perceptions Tracker (December 2022)

◇ ForwardKeys (2023)
Δ Google InVITE Travel Search Queries (January 2023)
Ω Tourism Economics (2022)
** Deloitte's Tourism Market Outlook (2022)
✓ Brand USA's International Travel & Consumer Sentiment Survey (May 2022)

€ Travel Weekly, Study Finds 90% Of Australians Plan To Travel In 2023, Their Destination Preferences Revealed (March 2023)
μ Destination Canada's Global Tourism Watch (2021)



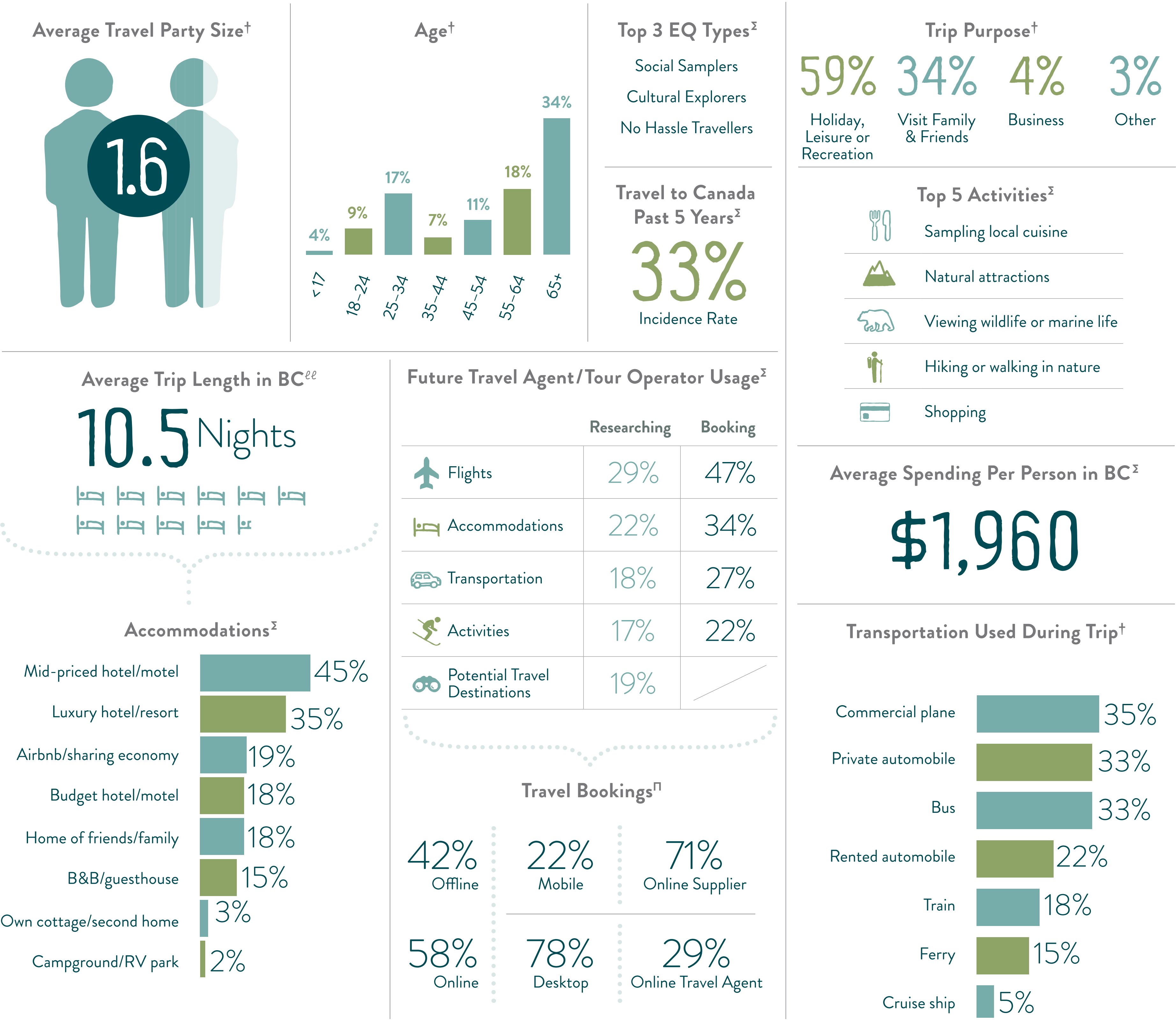
MARKET PROFILES

Australia

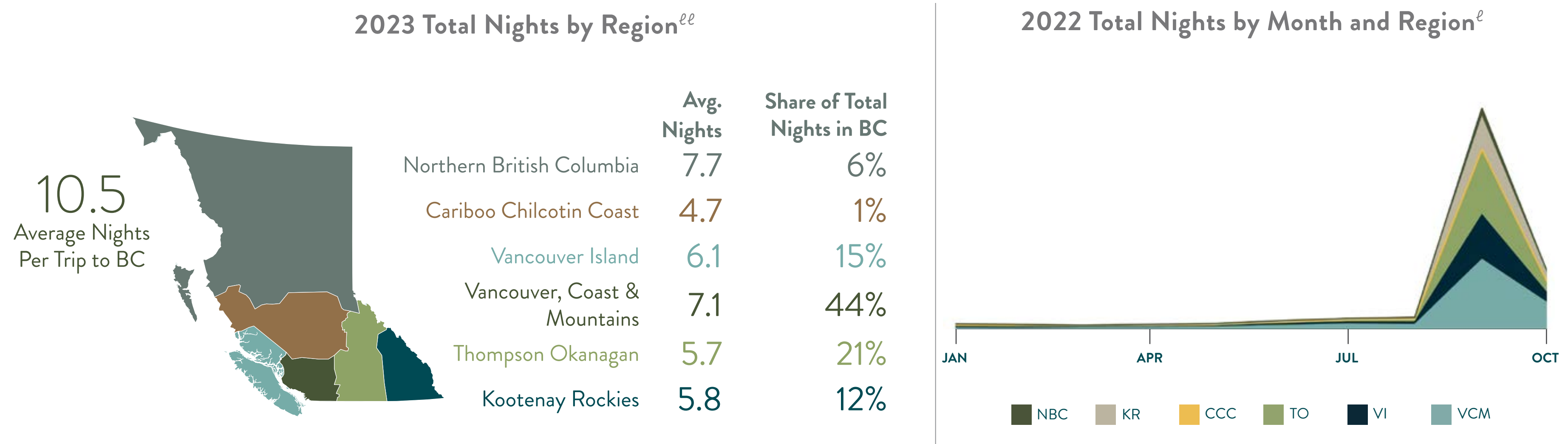
Traveller and trip characteristics are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs. Seasonal and geographical dispersion is reflective of 2022.

NOVEMBER 2023

Traveller and Trip Characteristics



Dispersion



MARKET PROFILES

China

NOVEMBER 2023

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Market Overview

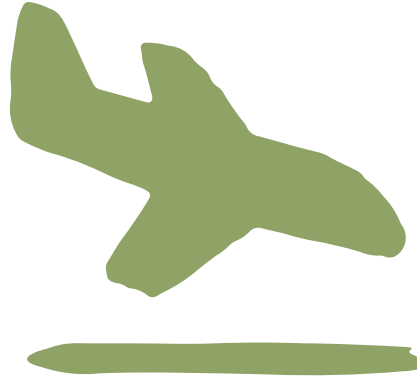
2022 Overnight Outbound Departures from China^Ω

5,595,080

Change in Overnight Departures From 2021 20.0%

Future Travel Indicators

Air Capacity to BC in 2023[◇]



+41.8%

Change Over 2022

2022 Market Visitation Rank^{††}

#6 China was the 6th Largest International Market for BC in 2022

2023 Market Status[§]

Monitor

2022 Market Potential^Σ

26%

Likelihood to Visit BC Within the Next 2 Years^{ΣΣ}

5.1M

2022 Potential Demand^{††}

BC Performance

2023 Estimated Visitation^{††}



93,000

3% China’s Share of International Visitation in BC (excluding US)

178,000 2024 Forecasted Visitation

2023 Estimated Expenditure^{††}



\$203.9M

3% China’s Share of International Expenditures in BC (excluding US)

\$401.3M 2024 Forecasted Expenditures

Market Highlights



Visitation from China is not forecasted to return to pre-pandemic levels until after 2027, as the pace of recovery is influenced by the current state of Canada-China relations.



China is not expected to return to pre-pandemic levels until approved destination status is re-established. Furthermore, China’s decision to maintain group tour restrictions on Canada, in contrast to the easing of restrictions for other nations, is impacting the Canadian tourism sector. The absence of group tours from China is leading to a noticeable decline in tourism revenue and a reduction in flights to Canada.[¶]



Before the pandemic, Chinese travellers were attracted to extravagant travel packages, such as Trip.com’s \$250,000 “Around the World” tour. Post-pandemic, the trend has shifted towards longer planning periods and a focus on wellness and personalized experiences in travel. Safety has become a critical factor in deciding travel destinations, marking a significant change from pre-pandemic preferences.”



For China, there is a slight reduction of 1% in air capacity for the period of January to June 2024, compared to 2023.[◇]



Air Canada has increased their capacity from YVR to Narita and Hong Kong.[¥] This move could bolster air support for Free Independent Travellers (FIT) from China. While group travel cannot be promoted by Chinese travel agents at this time, there is still FIT travel coming to BC and Canada.[¥]

SOURCES

†† Destination Canada’s Global Tourism Watch (2021)
ΣΣ Destination Canada’s Global Tourism Watch (Pooled 2020–2021)
§ Destination BC’s Global Marketing Plan (2023)
†† Destination BC’s Tabulations: Visitor Travel Survey (Statistics Canada) (2023)
†† Destination BC’s Public Perceptions Tracker (December 2022)

◇ ForwardKeys (2023)
Ω Tourism Economics (2022)
✓ Brand USA’s International Travel & Consumer Sentiment Survey (May 2022)
€ Destination Canada’s 2022 Market Highlights | China (2022)
€ January 2023 Chinese Traveler Sentiment Report, Dragon Trail International (January 2023)

∞ Destination Canada, Tourism Outlook (Fall 2022)
** Skift, *The New Chinese Traveler*: Latest Trends From Trip.com, November (2023)
µ Global News Canada, China is keeping group tour restrictions on Canada. *What will the impact be?*, (August 2023)
¥ Newswire, Air Canada Boosts Capacity to Asia Starting December (November 2023)

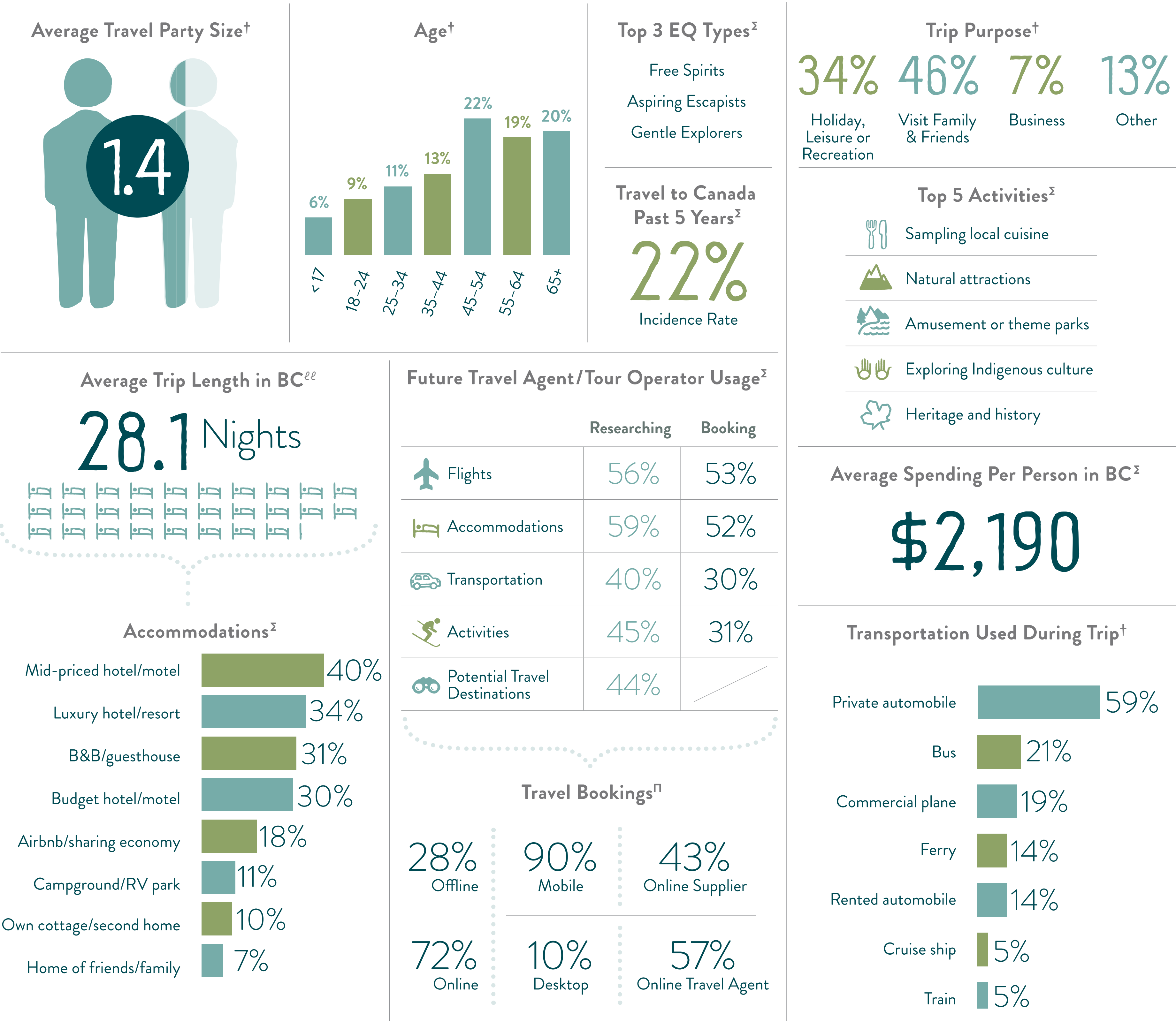
MARKET PROFILES

China

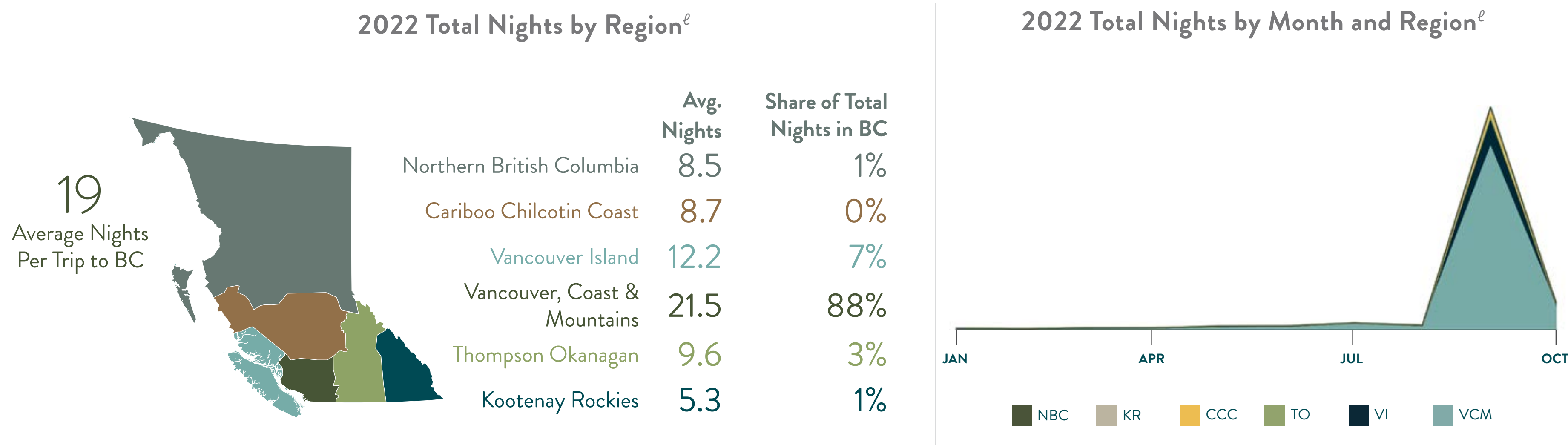
Traveller and trip characteristics are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs. Seasonal and geographical dispersion is reflective of 2022.

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Traveller and Trip Characteristics



Dispersion



MARKET PROFILES

Germany

NOVEMBER 2023

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Market Overview

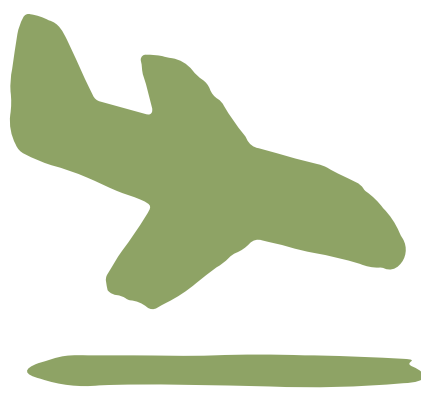
2022 Overnight Outbound Departures from Germany^Δ

86,718,340

Change in Overnight Departures From 2021 **94.4%**

Future Travel Indicators

Air Capacity to BC in 2023^Δ



0.8%

Change Over 2022

2022 Market Visitation Rank ^{††}

#4 Germany was the 4th Largest International Market for BC in 2022

2023 Market Status[§]

Invest

2022 Market Potential^Σ

13%

Likelihood to Visit BC Within the Next 2 Years^{ΣΣ}

2.7M

2022 Potential Demand^{††}

BC Performance

2023 Estimated Visitation^{††}



98,000

9% Germany's Share of International Visitation in BC (excluding US)

109,000 2024 Forecasted Visitation

2023 Estimated Expenditure^{††}



\$164.4M

8% Germany's Share of International Expenditures in BC (excluding US)

\$186.9M 2024 Forecasted Expenditures

2022 BC Travel Search Queries^Δ



+53%

Change Over 2021

Market Highlights



Visitation from Germany is not forecasted to recover to pre-pandemic levels until after 2027.



Driven by governmental efforts, Germany is witnessing a growing focus on sustainability. Destinations providing options for responsible and conscious travel are likely to appeal to German tourists.[€]



Germany is set to witness a substantial increase of 17% in air capacity for the first half of 2024 versus the same period in 2023, indicating a strong recovery and renewed interest in travel to British Columbia.^Δ



German travellers prioritize great deals, a desire to visit, and outdoor experiences when choosing Canada. Cost remains the primary barrier, with health and safety concerns diminishing as vaccine availability increases. Visa requirements, limited vacation time, weather, and travel distances within Canada are emerging concerns.^μ



Approximately 50% of German travellers are aware of their travel's environmental and social impact, with a similar proportion willing to pay more for responsible travel options. However, only a small percentage (11% for eco-friendly and 8% for socially responsible travel options) prioritize these factors when choosing Canada as a destination.^μ

SOURCES

†† Destination Canada's Global Tourism Watch (2021)
ΣΣ Destination Canada's Global Tourism Watch (Pooled 2020–2021)
§ Destination BC's Global Marketing Plan (2023)
†† Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2023)
†† Destination BC's Public Perceptions Tracker (December 2022)
Δ ForwardKeys (2023)

Δ Google InVITE Travel Search Queries (January 2023)
Q Tourism Economics (2022)
✓ Brand USA's International Travel & Consumer Sentiment Survey (May 2022)
€ Destination Canada's 2022 Market Highlights | Germany (2022)
μ Destination Canada's Global Tourism Watch (2021)

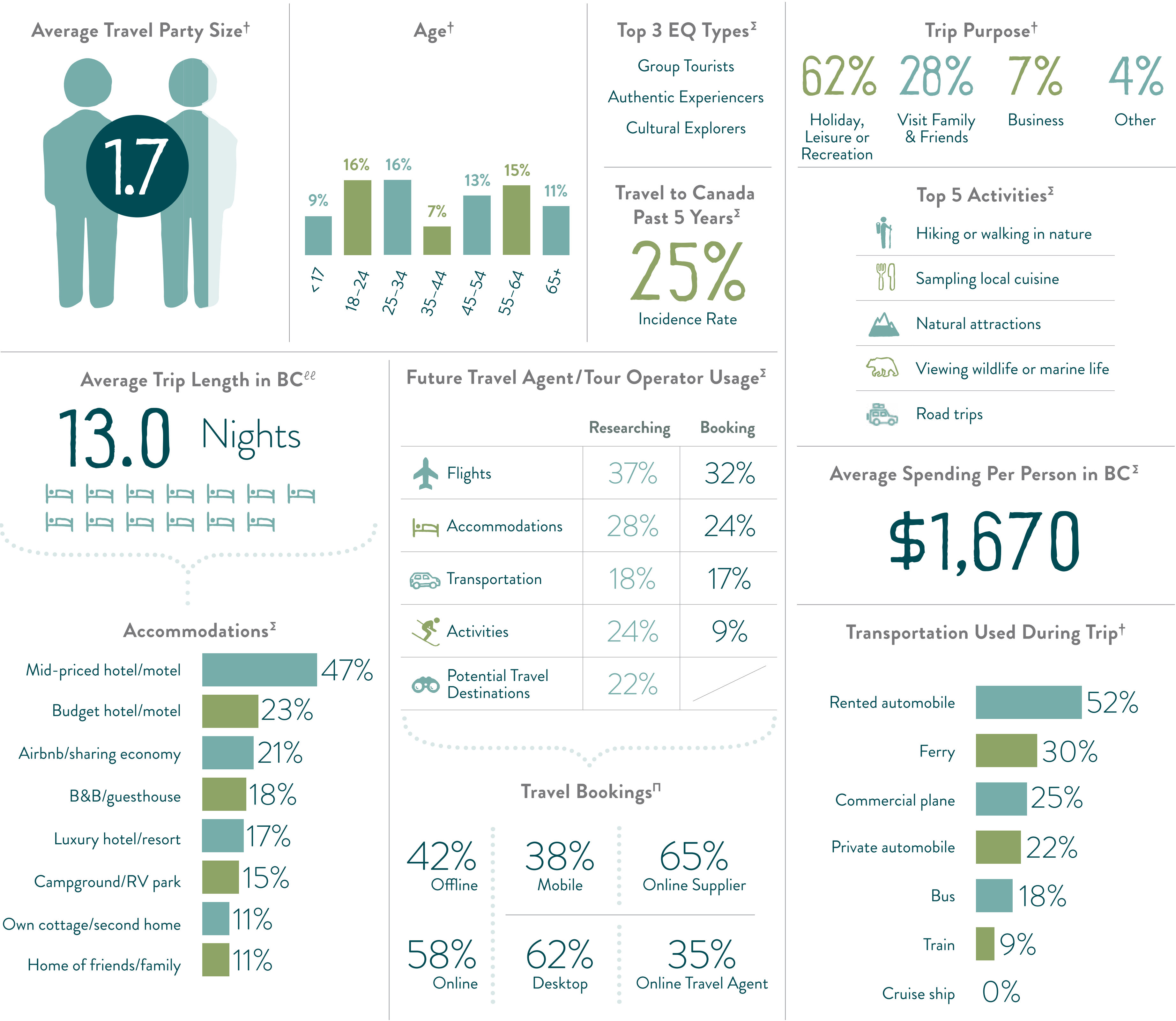
MARKET PROFILES

Germany

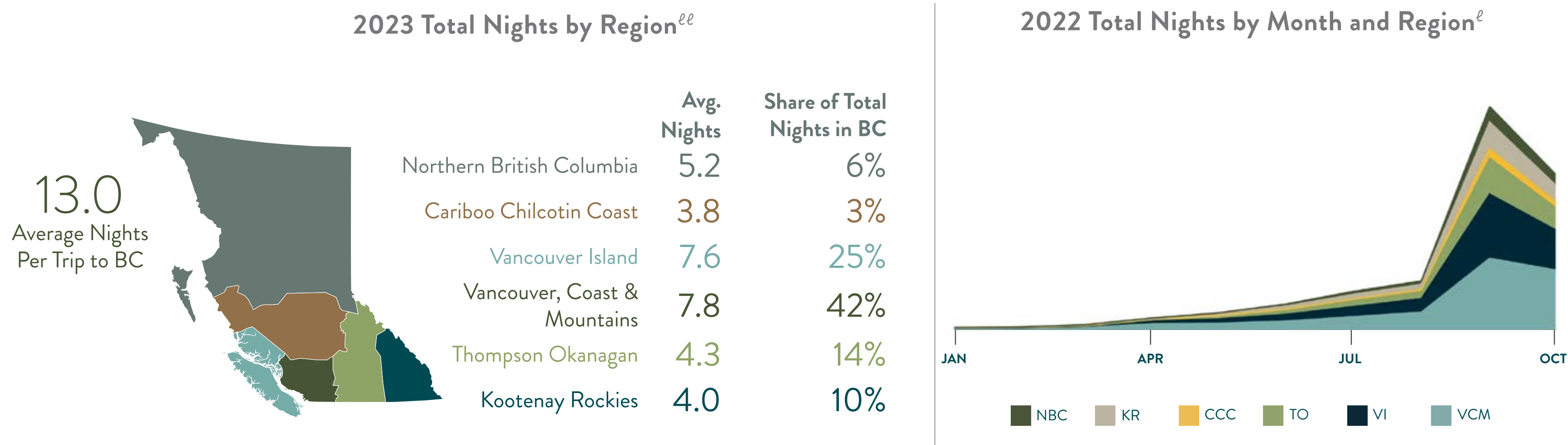
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Traveller and trip characteristics are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs. Seasonal and geographical dispersion is reflective of 2022.

Traveller and Trip Characteristics



Dispersion



MARKET PROFILES

Japan

NOVEMBER 2023

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Market Overview

2022 Overnight Outbound Departures from Japan^Δ

2,550,420

Change in Overnight Departures From 2021 **359.9%**

2022 Market Visitation Rank ^{††}

#10

Japan was the 10th Largest International Market for BC in 2022

2023 Market Status[§]

Monitor

2022 Market Potential

7%

Likelihood to Visit BC Within the Next 2 Years^{ΣΣ}

1.1M

2022 Potential Demand^{††}

BC Performance

2023 Estimated Visitation^{††}



52,000

3% Japan's Share of International Visitation in BC (excluding US)

87,000 2024 Forecasted Visitation

2023 Estimated Expenditure^{††}



\$90.4M

3% Japan's Share of International Expenditures in BC (excluding US)

\$155.6M 2024 Forecasted Expenditures

2022 BC Travel Search Queries^Δ

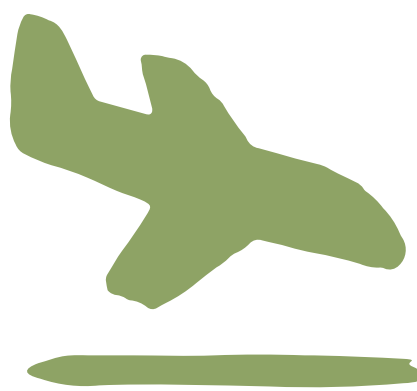


+46%

Change Over 2021

Future Travel Indicators

Air Capacity to BC in 2023[◇]



+57.9%

Change Over 2022

Market Highlights



Visitation from Japan is not forecasted to recover to pre-pandemic levels until after 2027.



In 2023, Japan has seen a notable rise in outbound international travel. The number of Japanese travellers venturing overseas has reached 8.4 million, a striking 289.7% increase from 2022 and 40.4% higher compared to 2019. This uptick is a clear indication of outbound travel's vigorous recovery as COVID-19 restrictions have eased."



The air capacity in Japan is forecasted to increase by 6% during January to June 2024 compared to the same period in the previous year, indicating a positive trajectory in travel dynamics.[◇]



When selecting Canada, Japanese travellers highly value relaxation (42%) and personal connections (40%), giving considerable importance to safety considerations (39%) as well. Personal media exposure influences 32% of their decisions, while cost (24%) and travel distance (20%) emerge as primary concerns. Additionally, a desire for familiarity with the destination (17%) and scheduling flexibility (15%) play roles in their choices."



Japanese travellers show a high regard for sustainable travel, with 71% considering Canada to be an environmentally friendly destination and 64% viewing it as a socially responsible one. Nonetheless, only 17% factor in eco-friendly travel activities, and a mere 8% look for socially responsible options when selecting their travel destination."

SOURCES

- †† Destination Canada's Global Tourism Watch (2021)
- ΣΣ Destination Canada's Global Tourism Watch (Pooled 2020–2021)
- § Destination BC's Global Marketing Plan (2023)
- †† Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2023)
- †† Destination BC's Public Perceptions Tracker (December 2022)
- ◇ ForwardKeys (2023)

- Δ Google InVITE Travel Search Queries (January 2023)
- Ω Tourism Economics (2022)
- ✓ Brand USA's International Travel & Consumer Sentiment Survey (May 2022)
- € Destination Canada's 2022 Market Highlights | Japan (2022)

- ∞ Destination Canada, Tourism Outlook (Fall 2022)
- ** JTB Corp, Prospective Travel Trends in 2023 (January through December), January 2023

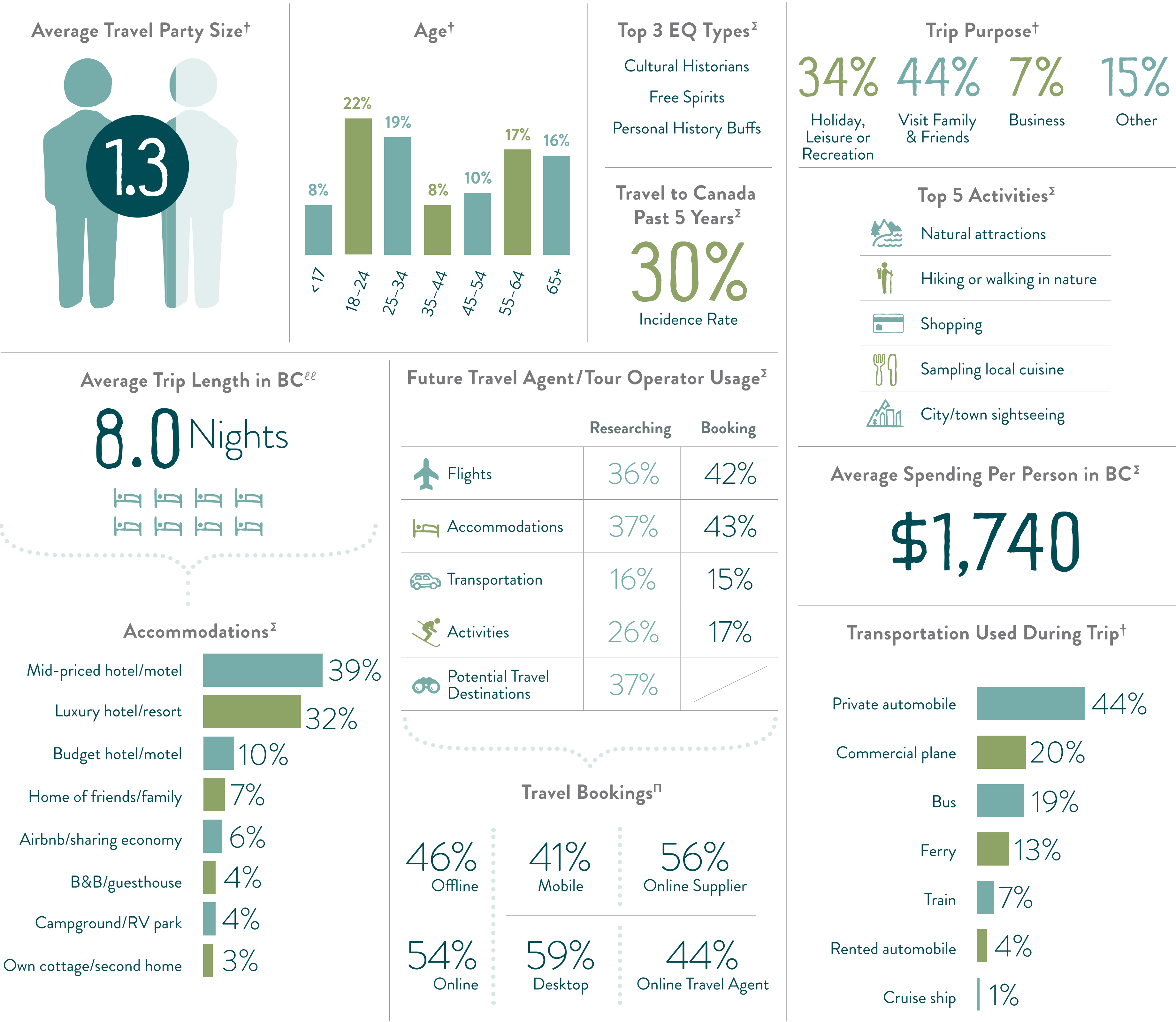
MARKET PROFILES

Japan

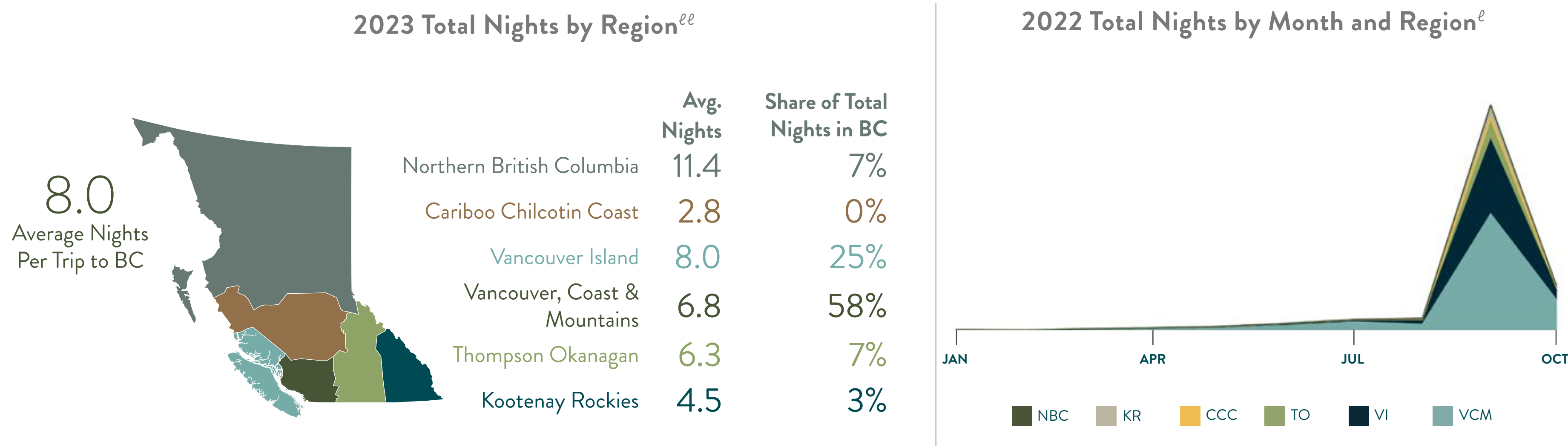
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Traveller and trip characteristics are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs. Seasonal and geographical dispersion is reflective of 2022.

Traveller and Trip Characteristics



Dispersion



MARKET PROFILES

Mexico

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Market Overview

2022 Overnight Outbound Departures from Mexico^Ω

13,960,960

Change in Overnight Departures From 2021 **28.0%**

2022 Market Visitation Rank^{††}

#2 Mexico’s was the 2nd Largest International Market for BC in 2022

2023 Market Status[§]

Invest

2022 Market Potential

23%

Likelihood to Visit BC Within the Next 2 Years^{ΣΣ}

0.82M

2022 Potential Demand^{††}

BC Performance

2023 Estimated Visitation^{††}



187,000

11% Mexico’s Share of International Visitation in BC (excluding US)

226,000 2024 Forecasted Visitation

2023 Estimated Expenditure^{††}



\$357.1M

12% Mexico’s Share of International Expenditures in BC (excluding US)

\$442.9M 2024 Forecasted Expenditures

2022 BC Travel Search Queries^Δ

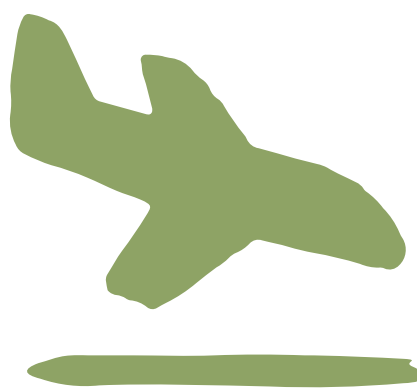


+57%

Change Over 2021

Future Travel Indicators

Air Capacity to BC in 2023[◇]



+44.1%

Change Over 2022

Market Highlights



Visitation from Mexico is forecasted to recover to pre-pandemic levels in 2023, exceeding 2019 visitation by +29%.



Mexico has seen a 12.8% growth in air capacity for the first half of 2024 compared to the corresponding period in 2023, indicating an increase in travel interest to British Columbia.[◇]



Safety, relaxation, and long-standing aspirations to visit are pivotal in influencing 39%, 34%, and 33% of Mexican travellers, respectively. Cultural experiences, family appeal, and eco-friendliness also play significant roles. However, cost and health risks are primary concerns for 29% each, with weather and visa requirements affecting over a fifth of potential visitors.[¶]



86% of Mexican travellers consider Canada to be an environmentally friendly destination, and 83% view it as socially responsible. Only 24% are influenced by the availability of eco-friendly travel activities, and 13% by socially responsible options when choosing Canada.[¶]

SOURCES

- †† Destination Canada’s Global Tourism Watch (2021)
ΣΣ Destination Canada’s Global Tourism Watch (Pooled 2020–2021)
§ Destination BC’s Global Marketing Plan (2023)
†† Destination BC’s Tabulations: Visitor Travel Survey (Statistics Canada) (2023)
¶ Destination BC’s Public Perceptions Tracker (December 2022)
◇ ForwardKeys (2023)

- Δ Google InVITE Travel Search Queries (January 2023)
Ω Tourism Economics (2022)
✓ Brand USA’s International Travel & Consumer Sentiment Survey (May 2022)
✓✓ Brand USA Consumer Sentiment Study (May 2022)
∞ Destination Canada, Tourism Outlook (Fall 2022)
μ Destination Canada’s Global Tourism Watch (2021)

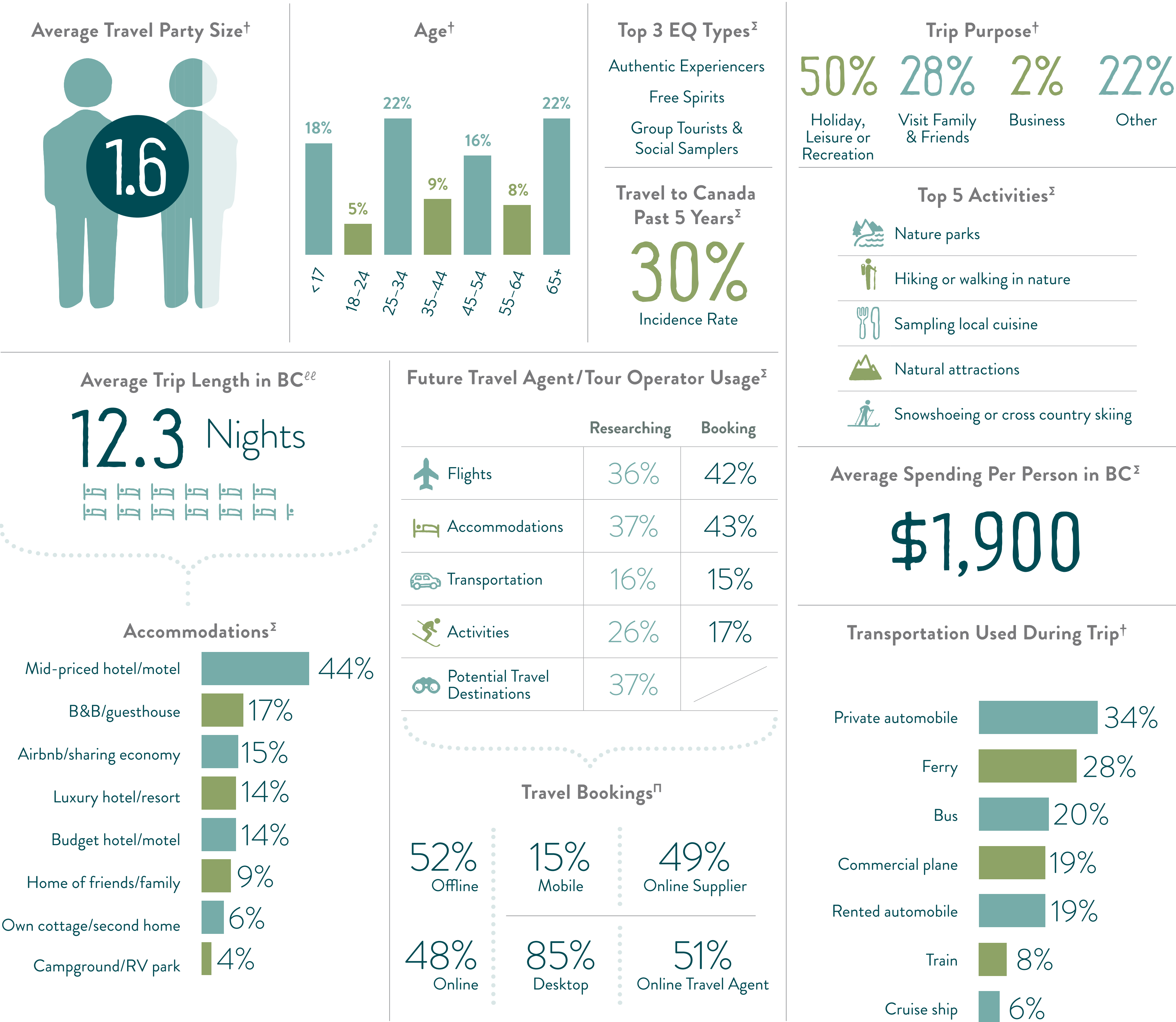
MARKET PROFILES

Mexico

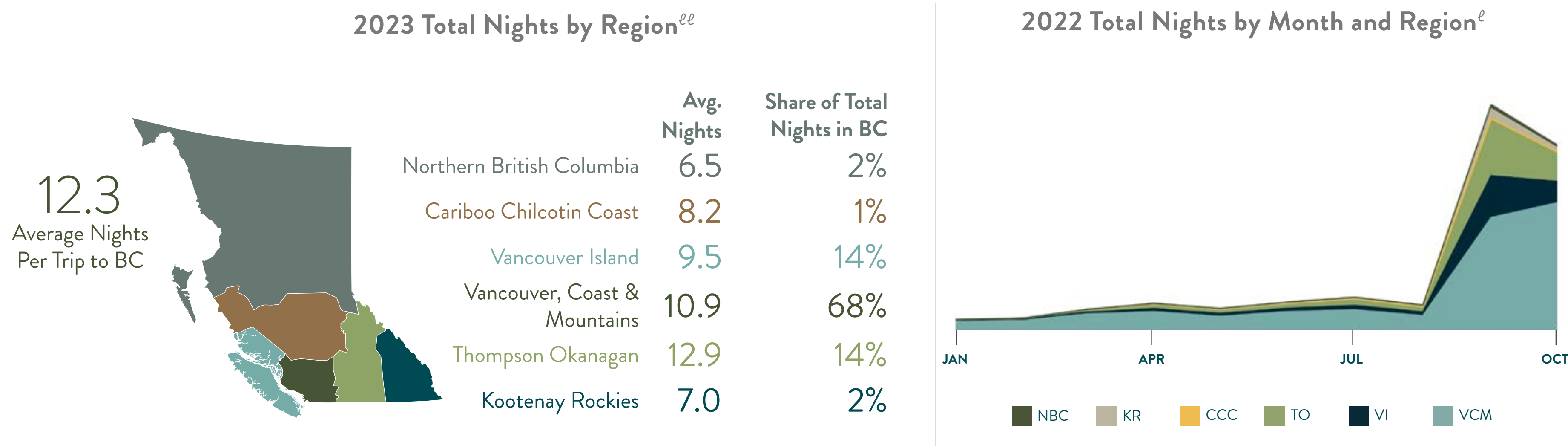
Traveller and trip characteristics are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs. Seasonal and geographical dispersion is reflective of 2022.

NOVEMBER 2023

Traveller and Trip Characteristics



Dispersion



MARKET PROFILES

South Korea

NOVEMBER 2023

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Market Overview

2022 Overnight Outbound Departures from South Korea^Ω

5,925,860

Change in Overnight Departures From 2021 **275.7%**

2022 Market Visitation Rank ^{††}

#9 South Korea was the 9th Largest International Market for BC in 2022

2023 Market Status[§]

Monitor

2022 Market Potential

17%

Likelihood to Visit BC Within the Next 2 Years^{ΣΣ}

3.5M

2022 Potential Demand^{††}

BC Performance

2023 Estimated Visitation^{††}



57,000

4% South Korea's Share of International Visitation in BC (excluding US)

80,000 2024 Forecasted Visitation

2023 Estimated Expenditure^{††}



\$71.6M

3% South Korea's Share of International Expenditures in BC (excluding US)

\$102.9M 2024 Forecasted Expenditures

2022 BC Travel Search Queries^Δ

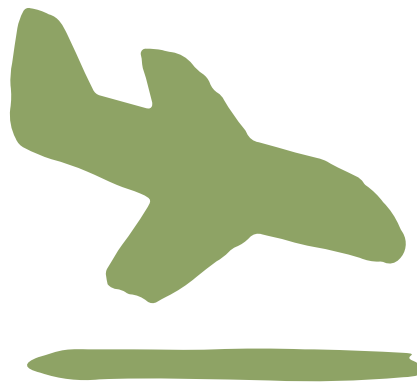


+37%

Change Over 2021

Future Travel Indicators

Air Capacity to BC in 2023[◇]



+22.8%

Change Over 2022

Market Highlights



Visitation from South Korea is forecasted to recover to pre-pandemic levels in 2025, exceeding 2019 visitation by +18%.



In South Korea, burnout rates have reached unprecedented levels, leading to a widespread desire for relaxation, a break from the routine, and personal growth. Canada is ideally situated to meet these needs for wellbeing. The primary reason South Koreans choose to visit Canada is to experience relaxation and rejuvenation.”



South Korea is anticipated to have a steady 2% increase in air capacity for the first six months of 2024 compared to those in 2023, reflecting sustained travel interest.[◇]



Relaxation and safety are key motivators for South Koreans considering Canada, with a special emphasis on eco-friendly travel for recent visitors. The primary obstacles for travellers are flight duration (39%) and overall cost (33%), with an increased consideration for weather concerns.^μ

SOURCES

- †† Destination Canada's Global Tourism Watch (2021)
ΣΣ Destination Canada's Global Tourism Watch (Pooled 2020–2021)
§ Destination BC's Global Marketing Plan (2023)
†† Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2023)
†† Destination BC's Public Perceptions Tracker (December 2022)
◇ ForwardKeys (2023)

- Δ Google InVITE Travel Search Queries (January 2023)
Ω Tourism Economics (2022)
** Ipsos Global Consumer Confidence Index (January 2023)
✓ Brand USA's International Travel & Consumer Sentiment Survey (June 2021)
∞ Destination Canada, Tourism Highlights (2022)
μ Destination Canada's Global Tourism Watch (2021)

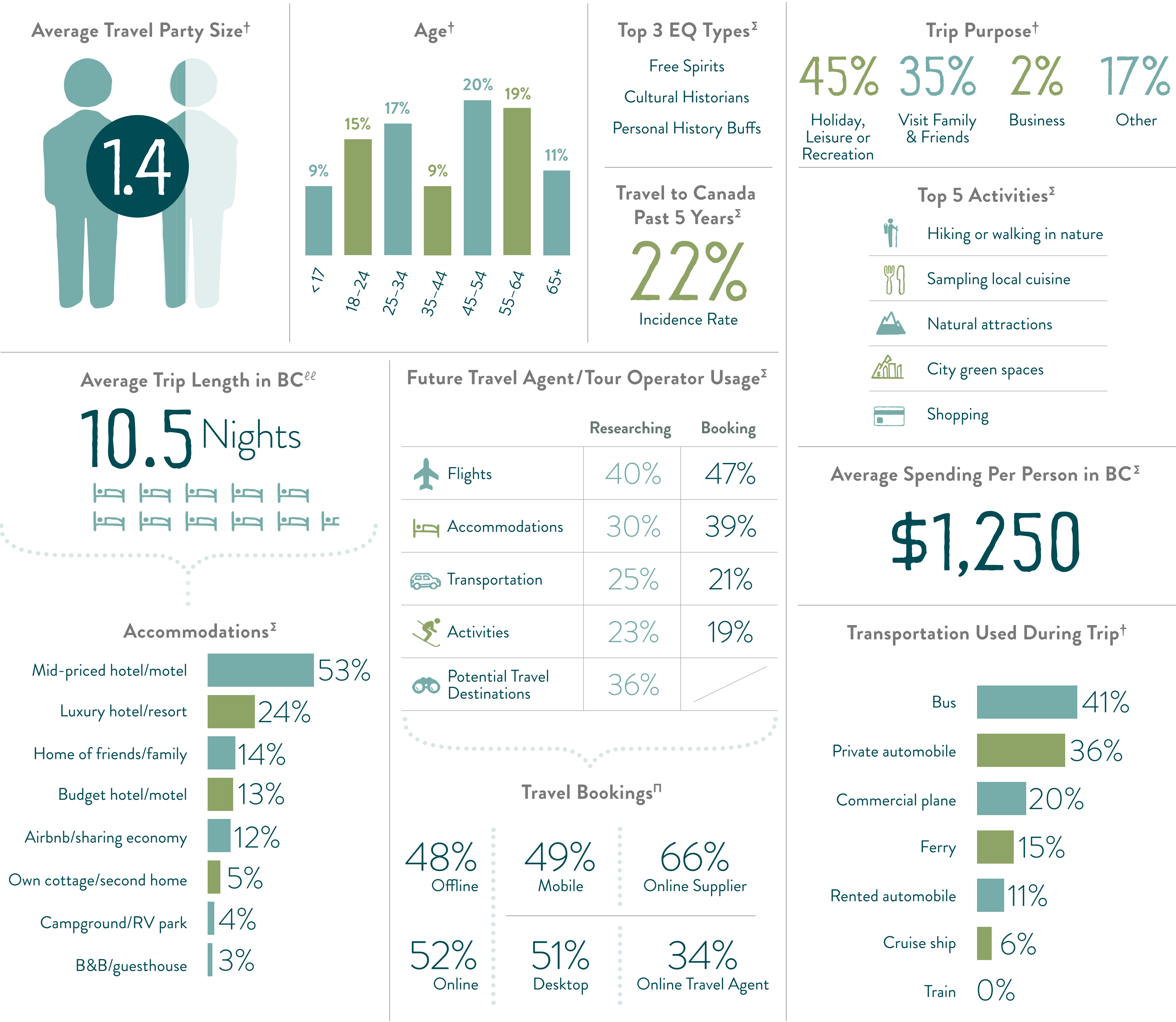
MARKET PROFILES

South Korea

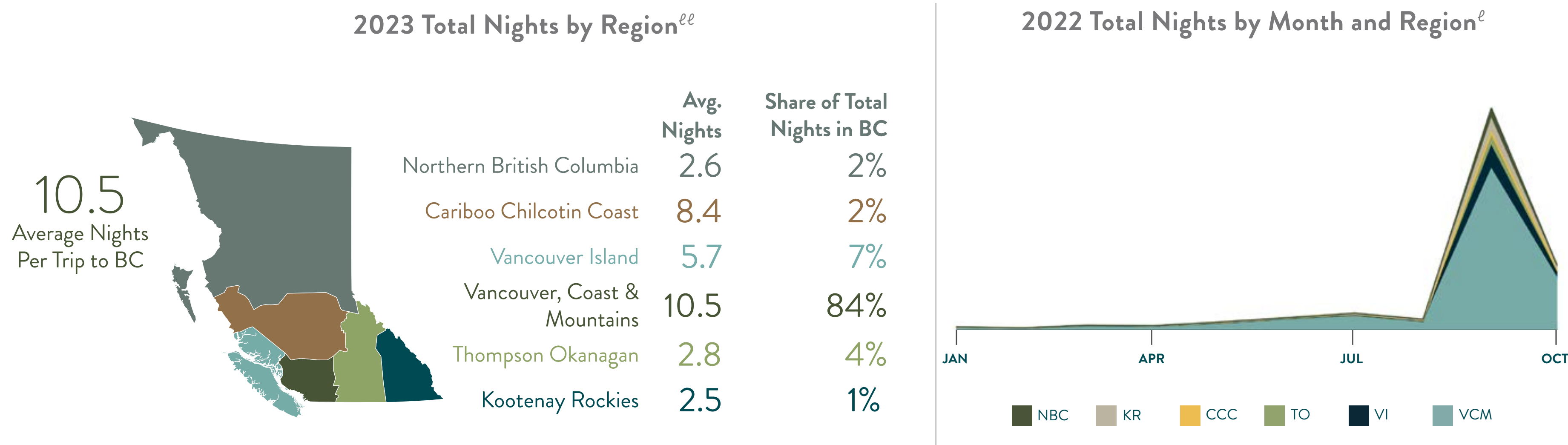
Traveller and trip characteristics are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs. Seasonal and geographical dispersion is reflective of 2022.

NOVEMBER 2023

Traveller and Trip Characteristics



Dispersion



MARKET PROFILES

United Kingdom

NOVEMBER 2023

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Market Overview

2022 Overnight Outbound Departures from United Kingdom^Ω

64,943,770

Change in Overnight Departures From 2021 **230.1%**

2022 Market Visitation Rank ^{††}

#1 United Kingdom was the 1st Largest International Market for BC in 2022

2023 Market Status[§]

Invest

17%

Likelihood to Visit BC Within the Next 2 Years^{ΣΣ}

3.5M

2022 Potential Demand^{††}

BC Performance

2023 Estimated Visitation^{††}



238,000

21% United Kingdom's Share of International Visitation in BC (excluding US)

260,000 2024 Forecasted Visitation

2023 Estimated Expenditure^{††}



\$353M

17% United Kingdom's Share of International Expenditures in BC (excluding US)

\$396.2M 2024 Forecasted Expenditures

2022 BC Travel Search Queries^Δ

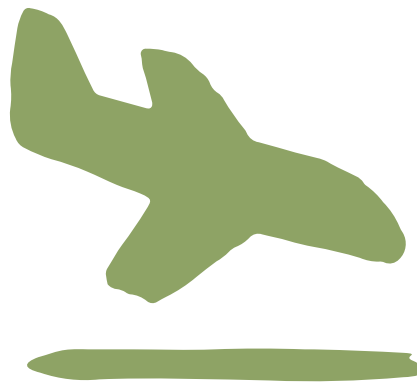


+50%

Change Over 2021

Future Travel Indicators

Air Capacity to BC in 2023[◇]



-7.1%

Change Over 2022

Market Highlights



Visitation from the United Kingdom is forecasted to recover to pre-pandemic levels in 2027, exceeding 2019 visitation by +1%.



UK households are currently experiencing record-high savings, anticipated to boost international travel demand. As British travellers seek to compensate for missed opportunities and gather their families, there is an expected increase in multi-generational trips. These trips are often aimed at bucket list destinations, including places like Canada.[<]



The United Kingdom shows a notable uplift of 11% in air capacity for January to June 2024 when compared with the same months in 2023, highlighting British Columbia’s growing prominence as a destination among British travellers.[◇]



For UK travellers, safety is the foremost consideration (40%) when choosing Canada, with outdoor and city experiences also highly valued. Cost remains the primary concern (33%), with visa requirements and weather conditions also influencing their decision to travel. The search for deals, once a significant motivator, has become less critical at 21%.^μ



Over half of UK travellers are mindful of their impact on travel destinations, with 67% considering Canada environmentally friendly and 67% viewing it as socially responsible. Despite this awareness, only 10% factor in eco-friendly travel options, and 8% consider socially responsible options as influential in their choice of Canada.^μ

SOURCES

- †† Destination Canada's Global Tourism Watch (2021)
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§ Destination BC's Global Marketing Plan (2023)
††† Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2023)
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- Δ Google InVITE Travel Search Queries (January 2023)
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< Destination Canada's Market Highlights, 2022
μ Destination Canada's Global Tourism Watch (2021)

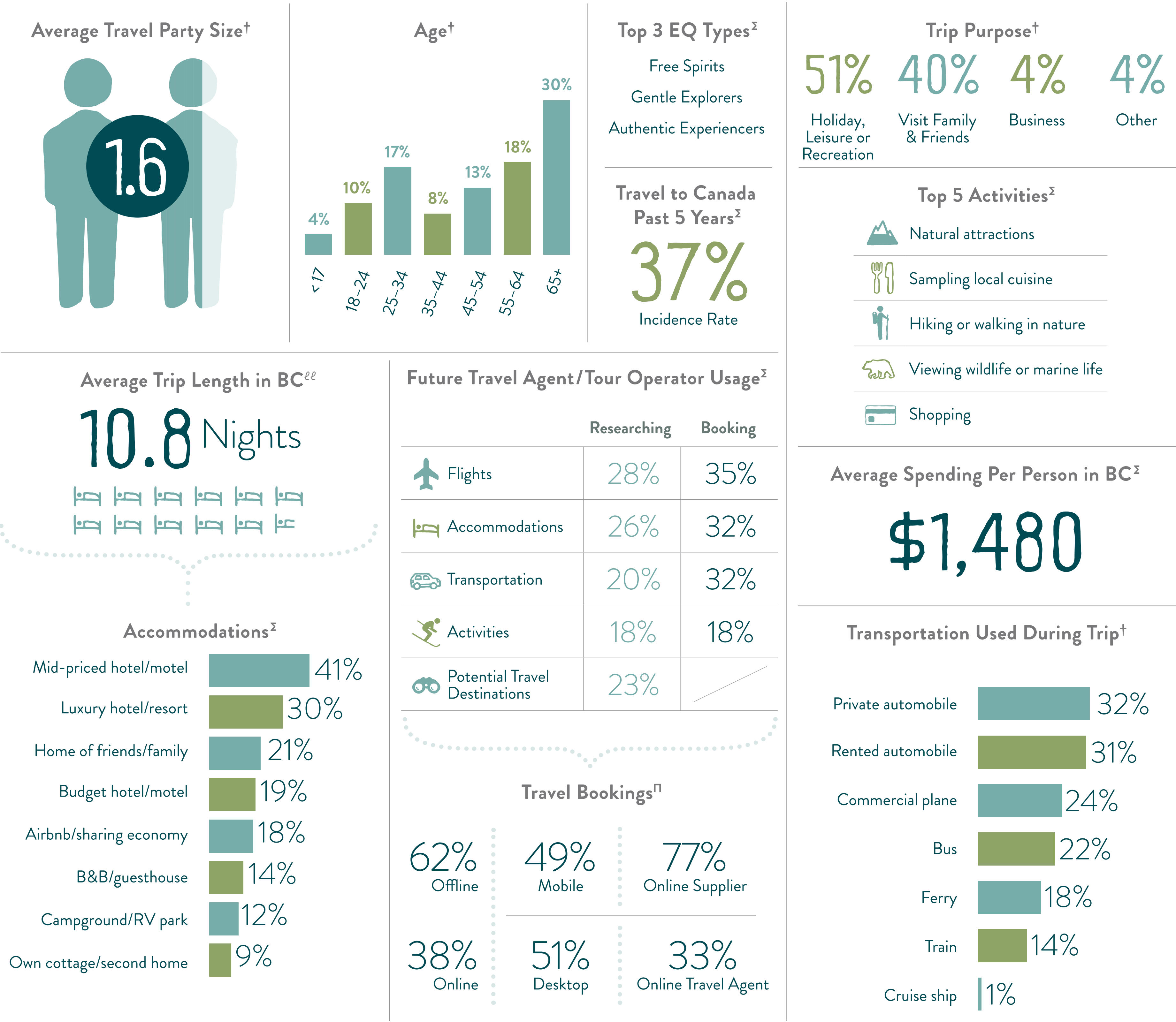
MARKET PROFILES

United Kingdom

NOVEMBER 2023

Traveller and trip characteristics are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs. Seasonal and geographical dispersion is reflective of 2022.

Traveller and Trip Characteristics



Dispersion

