



MARKET PROFILES

Australia

DECEMBER 2024

The 2024 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

2023 Overnight Outbound Departures from Australia<sup>Ω</sup>

10,556,200

Change in Overnight Departures From 2022: 70.5%

2023 Market Visitation Rank <sup>††</sup>

#11

Australia was the 11th Largest International Market for BC in 2023

2023 Market Status<sup>§</sup>

Grow Brand Affinity  
Geographic Dispersion  
Seasonal Dispersion

2022 Market Potential

18%

Likelihood to Visit BC Within the Next Two Years<sup>ΣΣ</sup>

1.2M

2022 Potential Demand<sup>¶¶</sup>

2023 Seasonal Dispersion Change<sup>Δ</sup>

-0.3<sub>PT</sub>

2023 Off Peak Nights 78.2%

Seasonal Dispersion is the % of nights spent in BC for all months outside of peak months of July and August.

2023 Geographical Dispersion Change<sup>Δ</sup>

-1.8<sub>PT</sub>

2023 Emerging Destination Nights 44%

Geographic Dispersion is the % of nights spent in BC for all destinations considered to be emerging.

BC Performance

2023 Estimated Visitation<sup>††</sup>



180,000

10%

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

231,000 2024 Forecasted Visitation

2023 Estimated Expenditure<sup>††</sup>



\$348M

11%

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

\$468.8M 2024 Forecasted Expenditures

2023 BC Travel Search Queries<sup>Δ</sup>

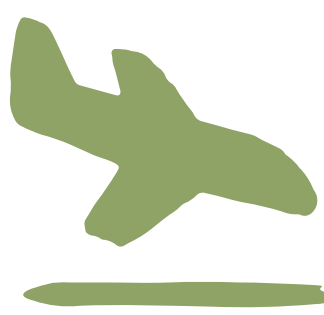


+23%

Change Over 2022

Future Travel Indicators

Air Capacity to BC in 2023<sup>◇</sup>



+45.1%

Change Over 2022

Flight Bookings in 2023<sup>◇</sup>

+69.9%

Change Over 2022

Market Highlights



Visitation from Australia is forecasted to recover to pre-pandemic levels in 2025, exceeding 2019 visitation by +15%.<sup>€</sup>



Long term, Australia is projected to be one of the fastest growing markets for Canada, with 65% of Australians likely to visit British Columbia in the next two years.<sup>β</sup>



49% of travellers from Australia utilized travel agents for their most recent trip.<sup>β</sup>



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.<sup>€</sup>



In the period from January to June 2024, Australia saw a 37% increase in air capacity compared to the same period in 2023.<sup>η</sup>



Key motivators for Australian travellers choosing Canada include safety, a longstanding desire to visit, and engage in outdoor experiences. Australians report that the greatest barriers to travel are the price of travel (52%) and the price of accommodation (38%).<sup>μ</sup>



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.<sup>μ</sup>



The Canadian dollar is expected to slowly weaken relative to the Australian dollar over the forecast horizon, increasing the purchasing power of the Australian traveller.<sup>β</sup>



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)

η BITRE Australian Government  
◇ ForwardKeys (2023)  
◇ Google InVITE Travel Search Queries (January 2023)  
Ω Tourism Economics (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)  
β Destination Canada Market Profiles (2024)  
λ Destination BC's Tabulations: Visitor Nights by Season (Sept 2023–Aug 2024)



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 2023.

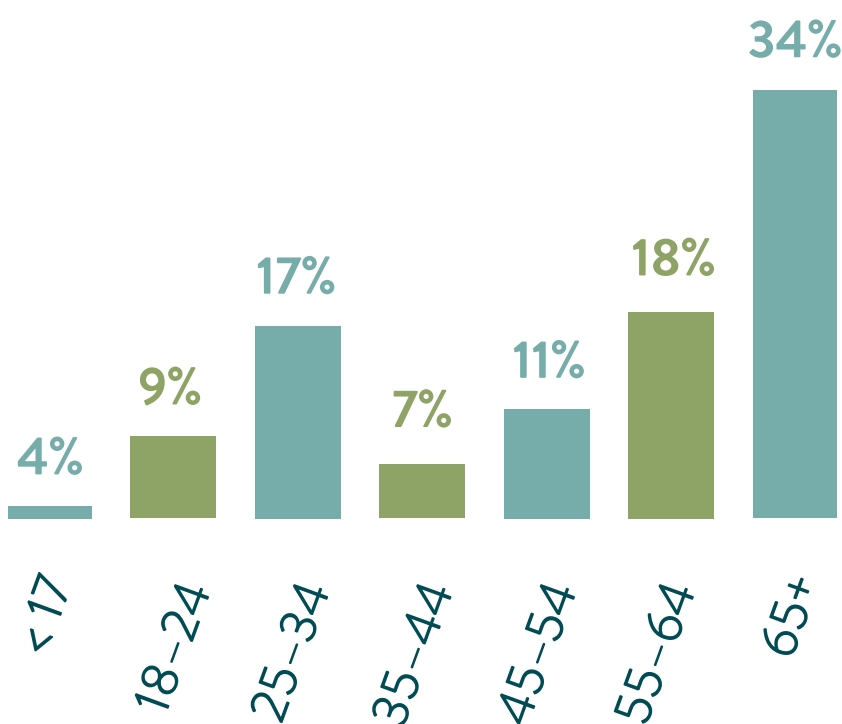
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Traveller and Trip Characteristics

Average Travel Party Size<sup>†</sup>



Age<sup>†</sup>



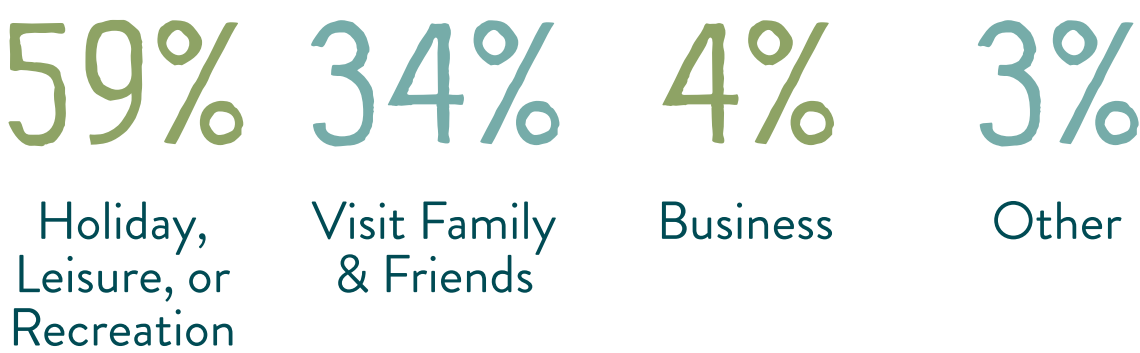
Travel to Canada  
Past 5 Years<sup>Σ</sup>

33%

Incidence Rate



Trip Purpose<sup>†</sup>

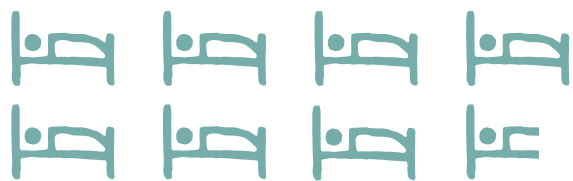


Top 5 Activities<sup>Σ</sup>

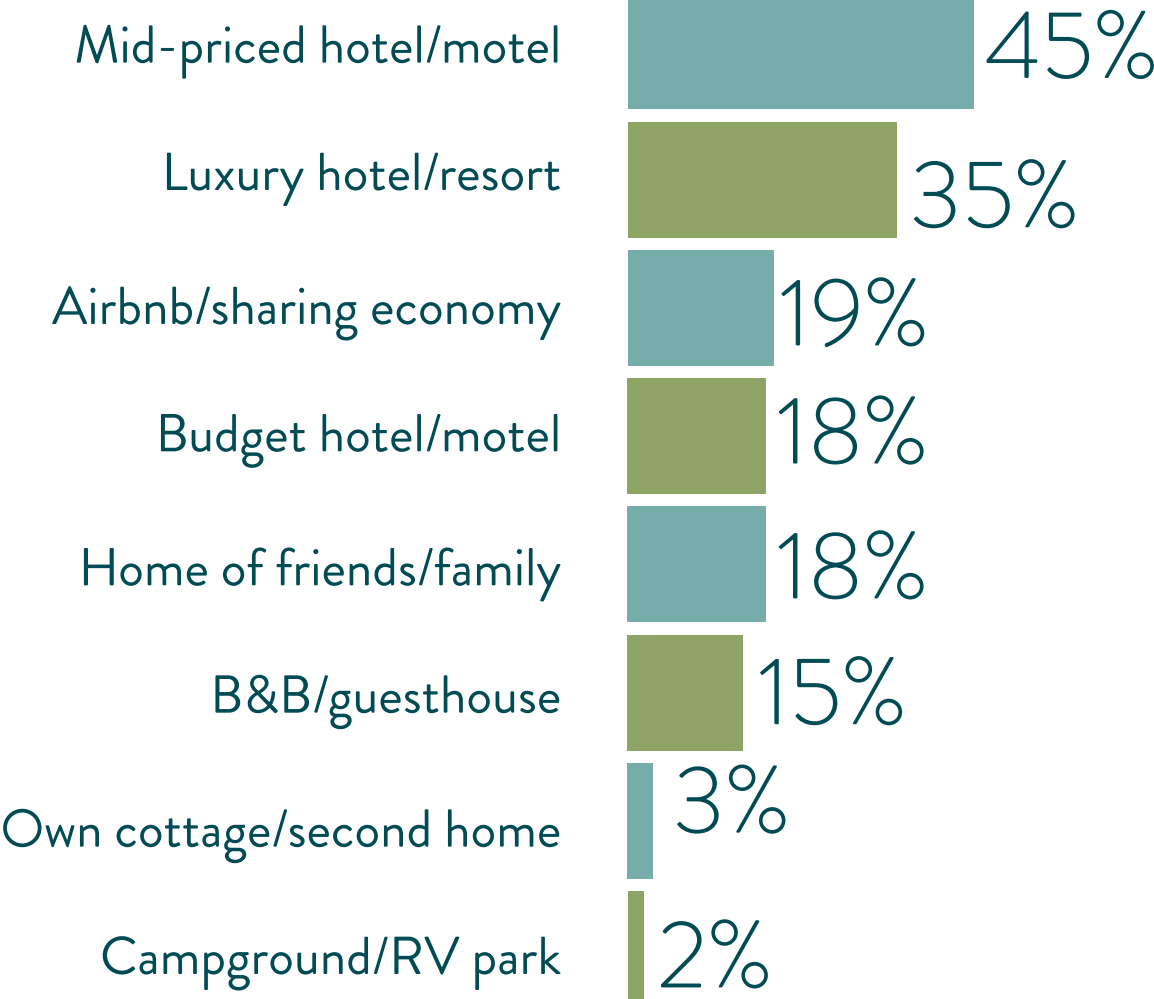


Average Trip Length in BC<sup>ℓ</sup>

6.7 Nights



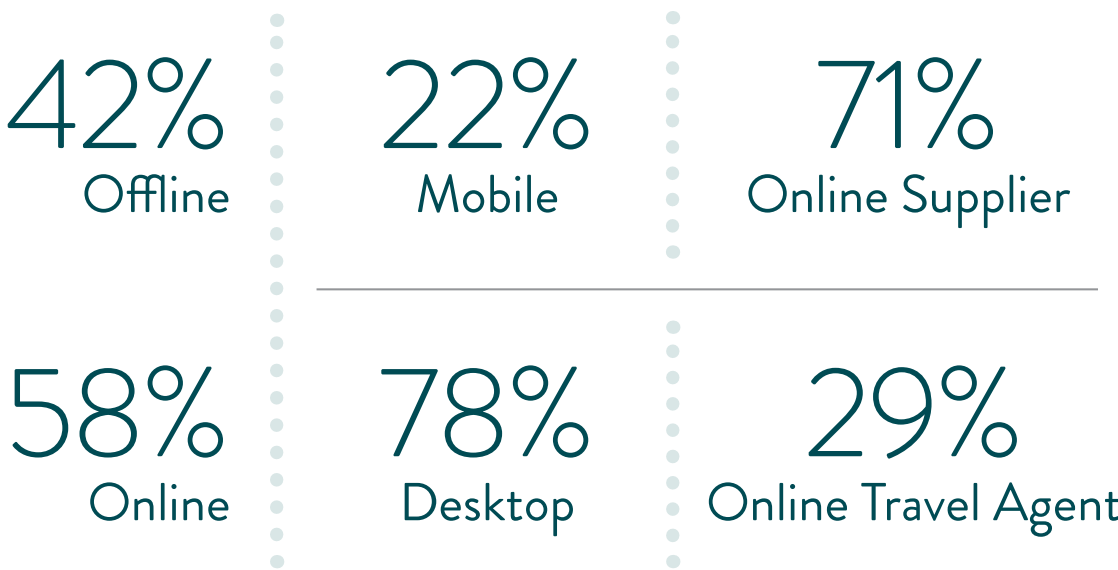
Accommodations<sup>Σ</sup>



Future 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%	

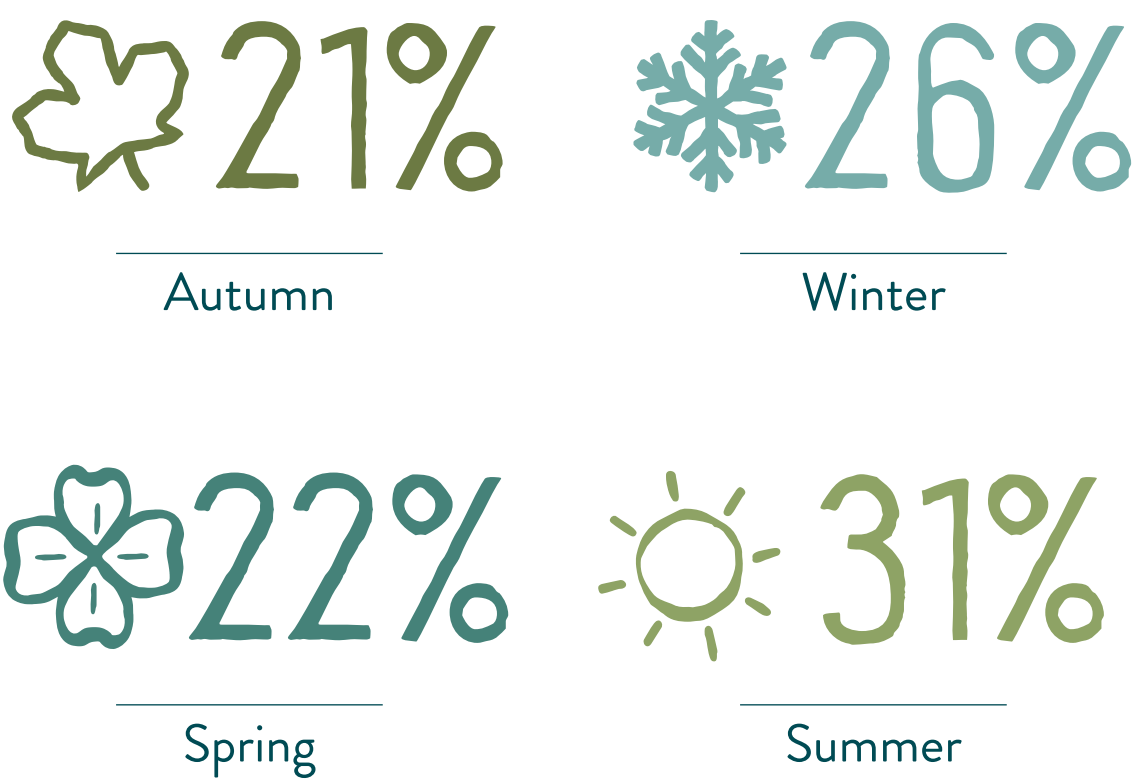
Travel Bookings<sup>Π</sup>



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

\$1,960

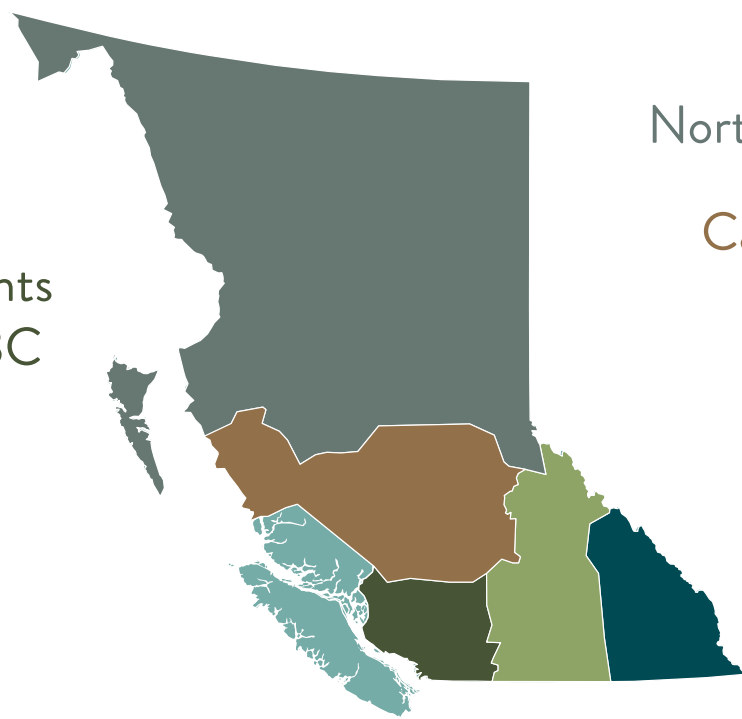
2023/24 Total Nights by Season<sup>Λ</sup>



Dispersion

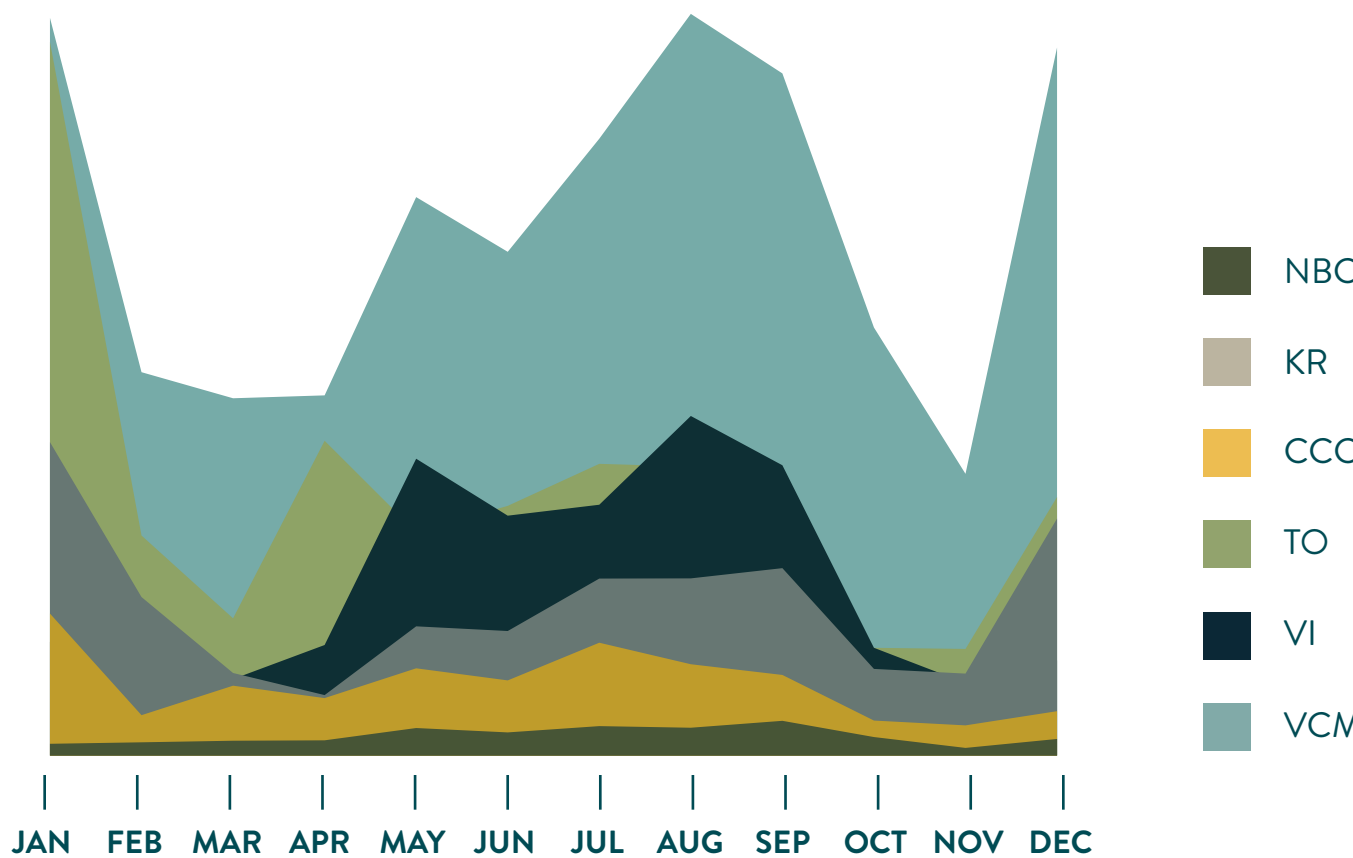
2023 Total Nights by Region<sup>ℓℓ</sup>

6.7  
Average Nights  
Per Trip to BC



	Avg. Nights	Share of Total Nights in BC
Northern British Columbia	8.0	6%
Cariboo Chilcotin Coast	4.9	1%
Vancouver Island	6.2	14%
Vancouver, Coast & Mountains	7.3	45%
Thompson Okanagan	5.9	21%
Kootenay Rockies	6.4	13%

2023 Total Nights by Month and Region<sup>ℓℓ</sup>



SOURCES

<sup>†</sup> Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2019)  
<sup>Σ</sup> Destination Canada's Global Tourism Watch (Pooled 2018–2019)  
<sup>ℓℓ</sup> Environics Analytics (2023)  
<sup>Π</sup> Phocuswright (2023)  
<sup>Λ</sup> Destination BC's Tabulations: Visitor Nights by Season (Sept 2023–Aug 2024)



MARKET PROFILES

# China

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Market Overview

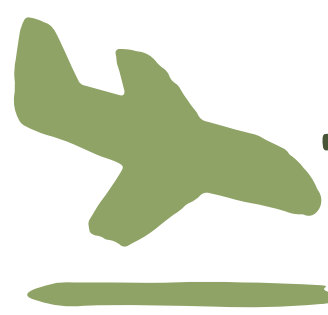
2023 Overnight Outbound Departures from China<sup>Ω</sup>

34,212,300

Change in Overnight Departures From 2022: 469.1%

Future Travel Indicators

Air Capacity to BC in 2023<sup>◇</sup>



+43.9%

Change Over 2022

Flight Bookings in 2023<sup>◇</sup>

+30.2%

Change Over 2022

2023 Market Visitation Rank<sup>††</sup>

#18

China was the 18th Largest International Market for BC in 2023

2023 Market Status<sup>§</sup>

Monitor

2022 Market Potential<sup>Σ</sup>

26%

Likelihood to Visit BC Within the Next Two Years<sup>ΣΣ</sup>

5.1M

2022 Potential Demand<sup>††</sup>

BC Performance

2023 Estimated Visitation<sup>††</sup>



100,000

3%

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

178,000

2024 Forecasted Visitation

2023 Estimated Expenditure<sup>††</sup>



\$216M

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 2028, as the pace of recovery is influenced by the current state of Canada-China relations.<sup>β</sup>



25% are likely to visit British Columbia in the next two years.<sup>β</sup>



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.<sup>μ</sup>



22% of Chinese said they were planning an international holiday in the next 12 months, although 19% also said they were not planning any holiday trips (international or domestic) in the coming year. The greatest barriers to travel cited by Chinese survey respondents were price (42%) and safety (40%).<sup>β</sup>



China reopened in December of 2022. Air connectivity between Canada and China has improved relative to 2022 but is still limited compared to 2019. China has restricted the sale of group travel to Canada, despite lifting restrictions for the United States, Australia, and most European nations. These factors will significantly delay China’s recovery. However, the long term forecast to 2030 remains robust.<sup>β</sup>

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)  
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)  
μ Global News Canada, China is keeping group tour restrictions on Canada. *What will the impact be?*, (August 2023)  
β Destination Canada Market Profiles (2024)



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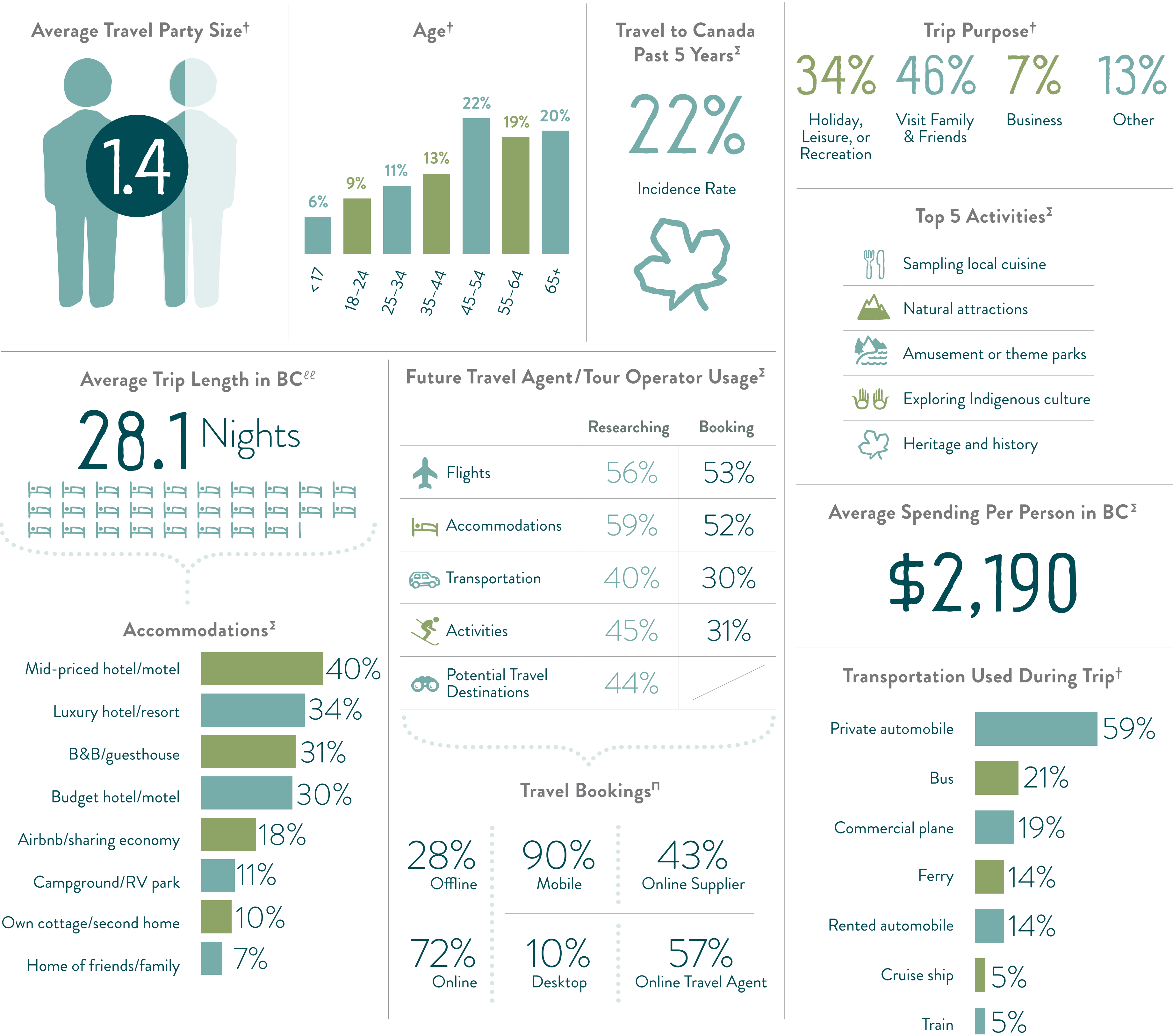
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China

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Traveller and Trip Characteristics





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# Germany

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## Market Overview

2023 Overnight Outbound Departures from Germany<sup>Q</sup>

102,231,900

Change in Overnight Departures From 2022: 18%

2023 Market Visitation Rank<sup>††</sup>

#17

Germany was the 17th Largest International Market for BC in 2023

2023 Market Status<sup>§</sup>

Grow Brand Affinity  
Geographic Dispersion

2022 Market Potential

13%

Likelihood to Visit BC Within the Next Two Years<sup>ΣΣ</sup>

2.7M

2022 Potential Demand<sup>††</sup>

2023 Seasonal Dispersion Change<sup>Δ</sup>

-8.5<sub>PT</sub>

2023 Off Peak Nights 65.7%

Seasonal Dispersion is the % of nights spent in BC for all months outside of peak months of July and August.

2023 Geographical Dispersion Change<sup>Δ</sup>

-3.1<sub>PT</sub>

2023 Emerging Destination Nights 47.9%

Geographic Dispersion is the % of nights spent in BC for all destinations considered to be emerging.

## BC Performance

2023 Estimated Visitation<sup>††</sup>



100,000

9%

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

109,000 2024 Forecasted Visitation

2023 Estimated Expenditure<sup>††</sup>



\$167M

8%

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

\$186.9M 2024 Forecasted Expenditures

2023 BC Travel Search Queries<sup>Δ</sup>

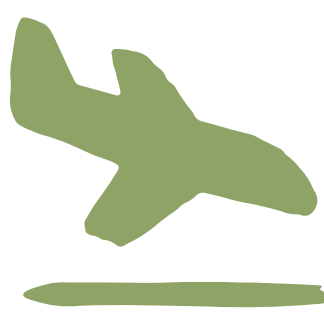


+41%

Change Over 2022

## Future Travel Indicators

Air Capacity to BC in 2023<sup>◇</sup>



-0.9%

Change Over 2022

Flight Bookings in 2023<sup>◇</sup>

+9.2%

Change Over 2022

### Market Highlights



Germany has seen the slowest recovery of Destination Canada’s European markets. Weak foreign demand and structural challenges are hindering economic growth and driving Germany’s underperformance. Spending by German travellers was forecast to fall just short of 2019 levels in 2024 before recovering in 2025. Visits from Germany will recover one year later (2026) than visits from other European markets.<sup>β</sup>



54% are likely to visit British Columbia in the next two years.<sup>β</sup>



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.<sup>€</sup>



Germany was 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.<sup>◇</sup>



German travellers prioritize great deals, a desire to visit, and outdoor experiences when choosing Canada. Cost remains the primary barrier. Visa requirements, limited vacation time, weather, and travel distances within Canada are emerging concerns.<sup>μ</sup>



59% of Germans said they were planning an international holiday in the next 12 months, the highest percentage among Destination Canada’s overseas markets.<sup>μ</sup>



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.<sup>μ</sup>



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#### 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)
- Q Tourism Economics (2022)
- € Destination Canada's 2022 Market Highlights | Germany (2022)
- μ Destination Canada's Global Tourism Watch (2021)
- β Destination Canada Market Profiles (2024)
- Δ Destination BC's Tabulations: Visitor Nights by Season (Sept 2023–Aug 2024)

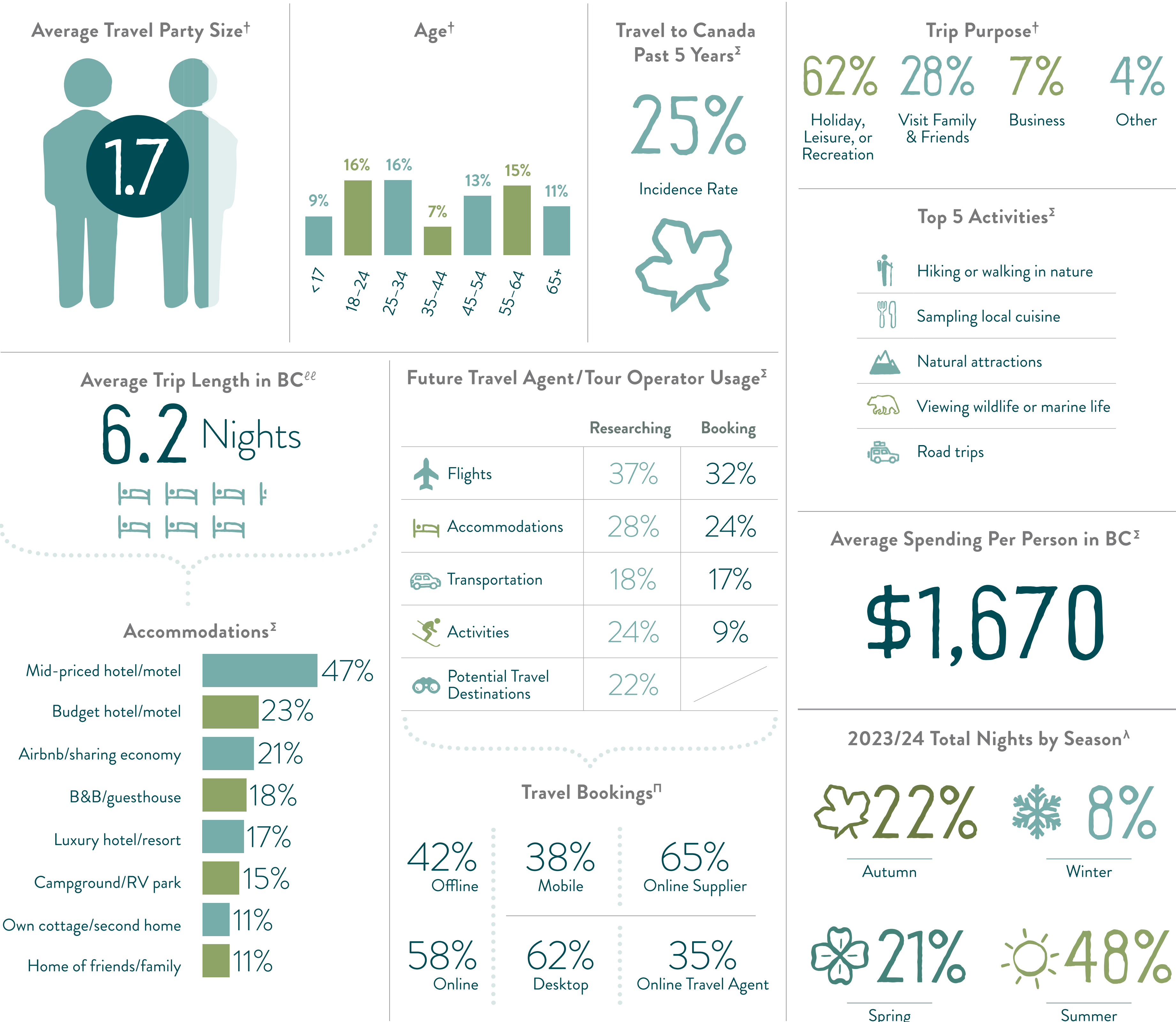
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Germany

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Traveller and Trip Characteristics





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Japan

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Market Overview

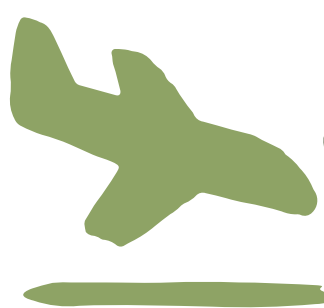
2023 Overnight Outbound Departures from Japan<sup>Ω</sup>

10,210,200

Change in Overnight Departures From 2022: 293.1%

Future Travel Indicators

Air Capacity to BC in 2023<sup>◇</sup>



+57.9%

Change Over 2022

Flight Bookings in 2023<sup>◇</sup>

+120.6%

Change Over 2022

2023 Market Visitation Rank<sup>††</sup>

#23

Japan was the 23rd Largest International Market for BC in 2023

2023 Market Status<sup>§</sup>

Monitor

2022 Market Potential

7%

Likelihood to Visit BC Within the Next Two Years<sup>ΣΣ</sup>

1.1M

2022 Potential Demand<sup>††</sup>

2023 Seasonal Dispersion Change<sup>Δ</sup>

+4.5

PT

2023 Off Peak Nights 68.8%

Seasonal Dispersion is the % of nights spent in BC for all months outside of peak months of July and August.

2023 Geographical Dispersion Change<sup>Δ</sup>

+5.4

PT

2023 Emerging Destination Nights 29.1%

Geographic Dispersion is the % of nights spent in BC for all destinations considered to be emerging.

BC Performance

2023 Estimated Visitation<sup>††</sup>



60,000

3%

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

87,000 2024 Forecasted Visitation

2023 Estimated Expenditure<sup>††</sup>



\$110M

3%

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

\$155.6M 2024 Forecasted Expenditures

2023 BC Travel Search Queries<sup>Δ</sup>



+56%

Change Over 2022

Market Highlights



Japan has been the second slowest market to recover, behind China. Visitation was down 55% in 2023, relative to 2019. Spending was projected to reach 55% of 2019 levels by the end of the year. However, the Japanese market was expected to continue to rebound in 2024. Both spending and visits were projected to grow by over 50% in 2024.<sup>β</sup>



48% are likely to visit British Columbia in the next two years.<sup>β</sup>



As of December 2023, 13% of Japanese survey respondents indicated that they were planning an international holiday in the next 12 months. Thirty-three per cent of Japanese travellers said they did not plan to take a holiday (either international or domestic) at all in 2024. Middle-aged travellers are most likely to travel overseas.<sup>βΩ</sup>



The air capacity in Japan was 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.<sup>◇</sup>



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.<sup>††</sup>



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.<sup>††</sup>



The yen has depreciated significantly relative to the Canadian dollar in recent years, reducing the purchasing power of the Japanese traveller. The Yen was expected to fall relative to \$CAD in 2024 as well, then slowly strengthen in the coming years.



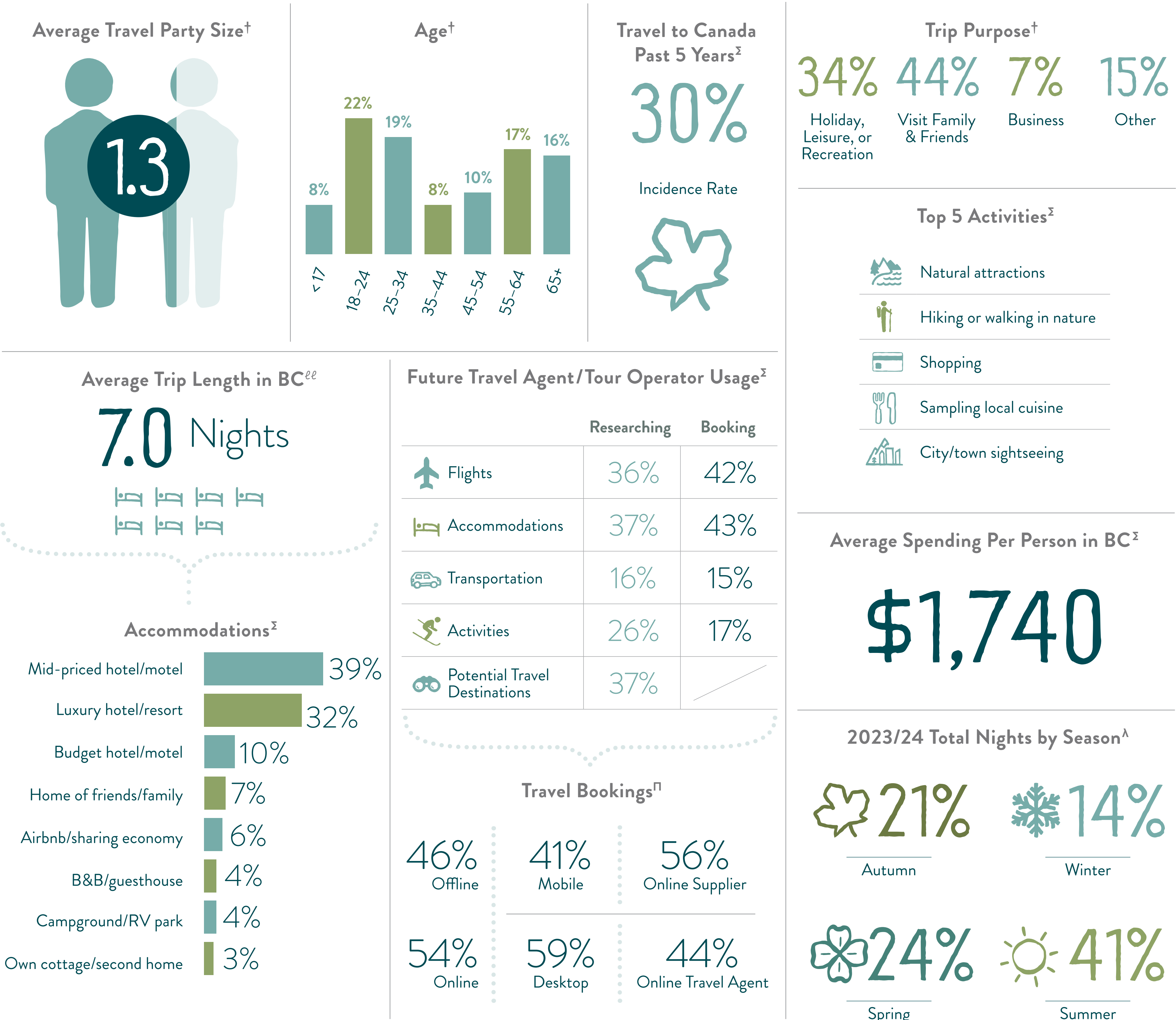
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Japan

DECEMBER 2024

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Traveller and Trip Characteristics





MARKET PROFILES

# Mexico

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Market Overview

2023 Overnight Outbound Departures from Mexico<sup>Ω</sup>

16,400,200

Change in Overnight Departures From 2022: 19.3%

2023 Market Visitation Rank<sup>††</sup>

#10

Mexico was the 10th Largest International Market for BC in 2023

2023 Market Status<sup>§</sup>

Grow Brand Affinity  
Seasonal Dispersion

2022 Market Potential

7%

Likelihood to Visit BC Within the Next Two Years<sup>ΣΣ</sup>

1.1M

2022 Potential Demand<sup>π</sup>

2023 Seasonal Dispersion Change<sup>Δ</sup>

-3.5

PT

2023 Off Peak Nights 75.9%

Seasonal Dispersion is the % of nights spent in BC for all months outside of peak months of July and August.

2023 Geographical Dispersion Change<sup>Δ</sup>

-2.6

PT

2023 Emerging Destination Nights 23.6%

Geographic Dispersion is the % of nights spent in BC for all destinations considered to be emerging.

BC Performance

2023 Estimated Visitation<sup>††</sup>



180,000

11%

Mexico's Share of International Visitation in BC (excluding US)

226,000 2024 Forecasted Visitation

2023 Estimated Expenditure<sup>††</sup>



\$342M

12%

Mexico's Share of International Expenditures in BC (excluding US)

\$442.9M 2024 Forecasted Expenditures

2023 BC Travel Search Queries<sup>Δ</sup>

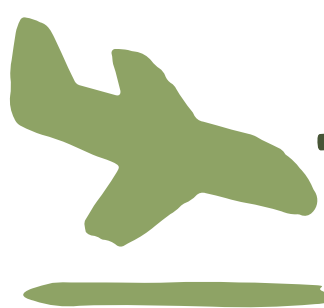


+16%

Change Over 2022

Future Travel Indicators

Air Capacity to BC in 2023<sup>◇</sup>



+42.5%

Change Over 2022

Flight Bookings in 2023<sup>◇</sup>

+35.8%

Change Over 2022

Market Highlights



Mexico was the quickest of Canada’s travel markets to recover. Visits from Mexico reached 113% of 2019 levels in 2023. Spending was estimated to have reached \$865 million in 2023, exceeding 2019 levels by 32%.<sup>β</sup>



51% are likely to visit British Columbia in the next two years.<sup>β</sup>



Mexican visits to BC fell after Canada added visa requirement. The drop in visits to Canada by Mexicans through BC started in April 2024.<sup>ρ</sup>



Facing a range of operational issues from crew resources to engine maintenance, some of Mexico’s airlines have had to significantly adjust their operations, resulting in less capacity being operated on several key routes. Ultimately, many airlines are struggling to operate to the full potential due to ongoing maintenance and supply chain issues. As a result, planned capacity increases in many markets may be delayed.<sup>ο</sup>



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.<sup>ρ</sup>



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.<sup>λ</sup>



The Mexican peso strengthened relative to the Canadian dollar in 2022 and 2023, giving Mexican travellers greater purchasing power. Some of that power will be lost in 2024/2025 as the peso is expected to weaken relative to \$CAD.<sup>β</sup>



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SOURCES

- π Destination Canada's Global Tourism Watch (2021)
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- 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)
- β Destination Canada Market Profiles (2024)
- ∅ OAG (November 2024)
- ρ BIV—Business Intelligence for BC (July 2024)
- λ Destination BC's Tabulations: Visitor Nights by Season (Sept 2023–Aug 2024)



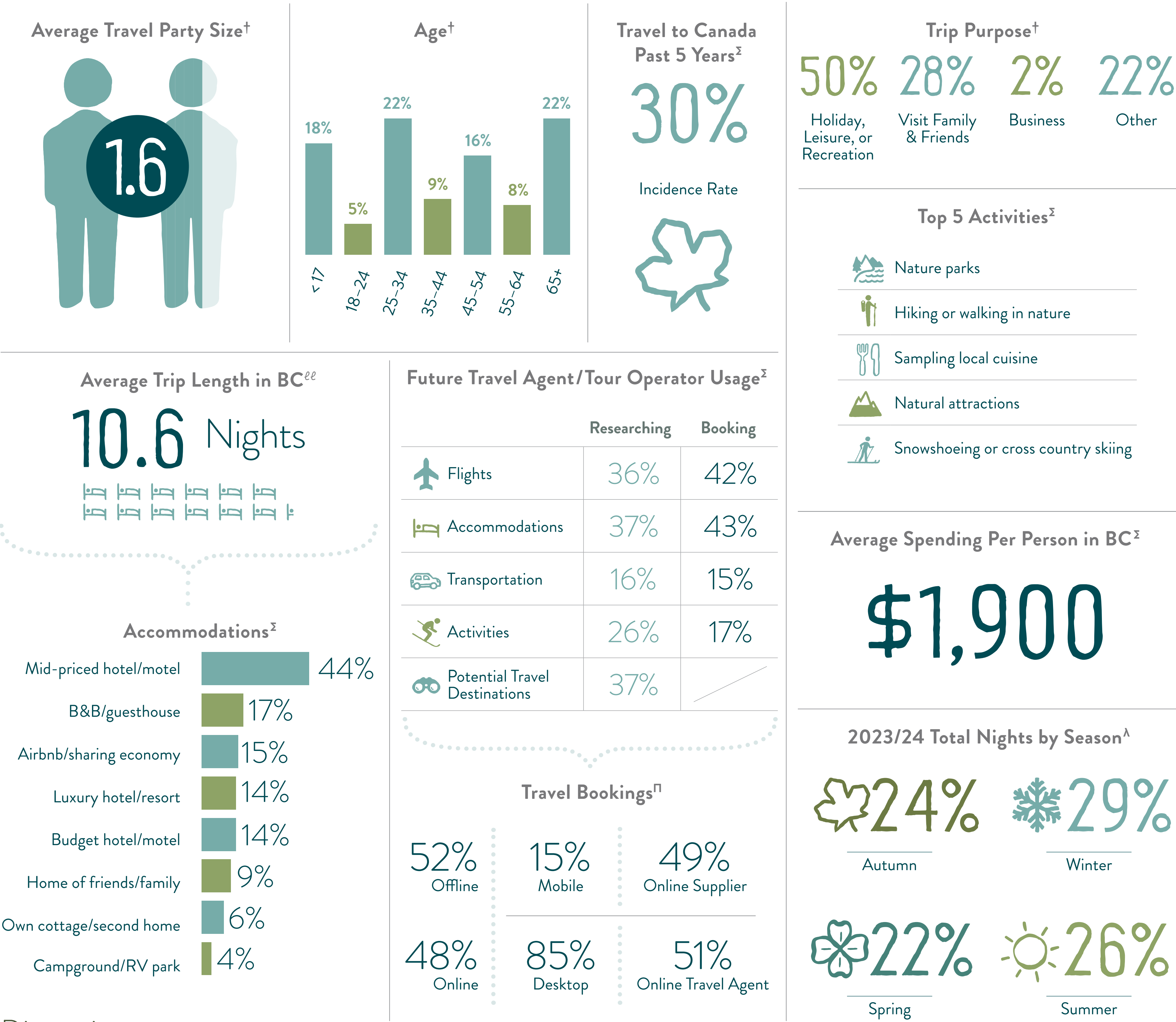
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Mexico

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Traveller and Trip Characteristics





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# South Korea

DECEMBER 2024

The 2024 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

2023 Overnight Outbound Departures from South Korea<sup>Ω</sup>

20,890,300

Change in Overnight Departures From 2022: **246.7%**

2023 Market Visitation Rank<sup>††</sup>

#25 South Korea was the 25th Largest International Market for BC in 2023

2023 Market Status<sup>§</sup>

Monitor

2022 Market Potential

17%

Likelihood to Visit BC Within the Next Two Years<sup>ΣΣ</sup>

3.5M

2022 Potential Demand<sup>††</sup>

2023 Seasonal Dispersion Change<sup>Δ</sup>

+4.0 PT 2023 Off Peak Nights **78.1%**

Seasonal Dispersion is the % of nights spent in BC for all months outside of peak months of July and August.

2023 Geographical Dispersion Change<sup>Δ</sup>

-2.7 PT 2023 Emerging Destination Nights **10.9%**

Geographic Dispersion is the % of nights spent in BC for all destinations considered to be emerging.

BC Performance

2023 Estimated Visitation<sup>††</sup>



60,000

4%

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

80,000 2024 Forecasted Visitation

2023 Estimated Expenditure<sup>††</sup>



\$76M

3%

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

\$102.9M 2024 Forecasted Expenditures

2023 BC Travel Search Queries<sup>Δ</sup>

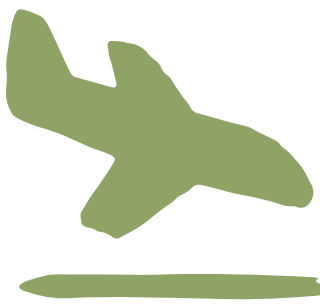


+61%

Change Over 2022

Future Travel Indicators

Air Capacity to BC in 2023<sup>◇</sup>



+22.6%

Change Over 2022

Flight Bookings in 2023<sup>◇</sup>

+68.9%

Change Over 2022

Market Highlights



South Korea has shown the fastest recovery among Asian markets, but has been slower to recover than Australia, and markets in Europe and North America. Spending by South Korean travellers in Canada was expected to reach 66% of 2019 levels in 2023 and recover in 2025 with visits recovering one year later.<sup>β</sup>



46% are likely to visit British Columbia in the next two years.<sup>β</sup>



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.<sup>∞</sup>



A slower capacity growth rate in the first half of 2024 appears to have allowed South Korean airlines to solidify their network recovery in its post-pandemic phase. This has helped it lift load factors, even though competitive capacity from outside the country has been rising.<sup>μ</sup>



In a December 2024 YouGov survey, over half (52%) of South Koreans said they are planning an international holiday in the next 12 months compared to 22% of Chinese and 13% of Japanese respondents.

South Korean’s were concerned about the increased cost of travel, with 54% citing price as the greatest barrier to travel. This was the highest percentage among overseas markets.<sup>β</sup>



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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)  
β Destination Canada Market Profiles (2024)  
μ CAPA (Centre for Aviation)  
λ Destination BC's Tabulations: Visitor Nights by Season (Sept 2023–Aug 2024)

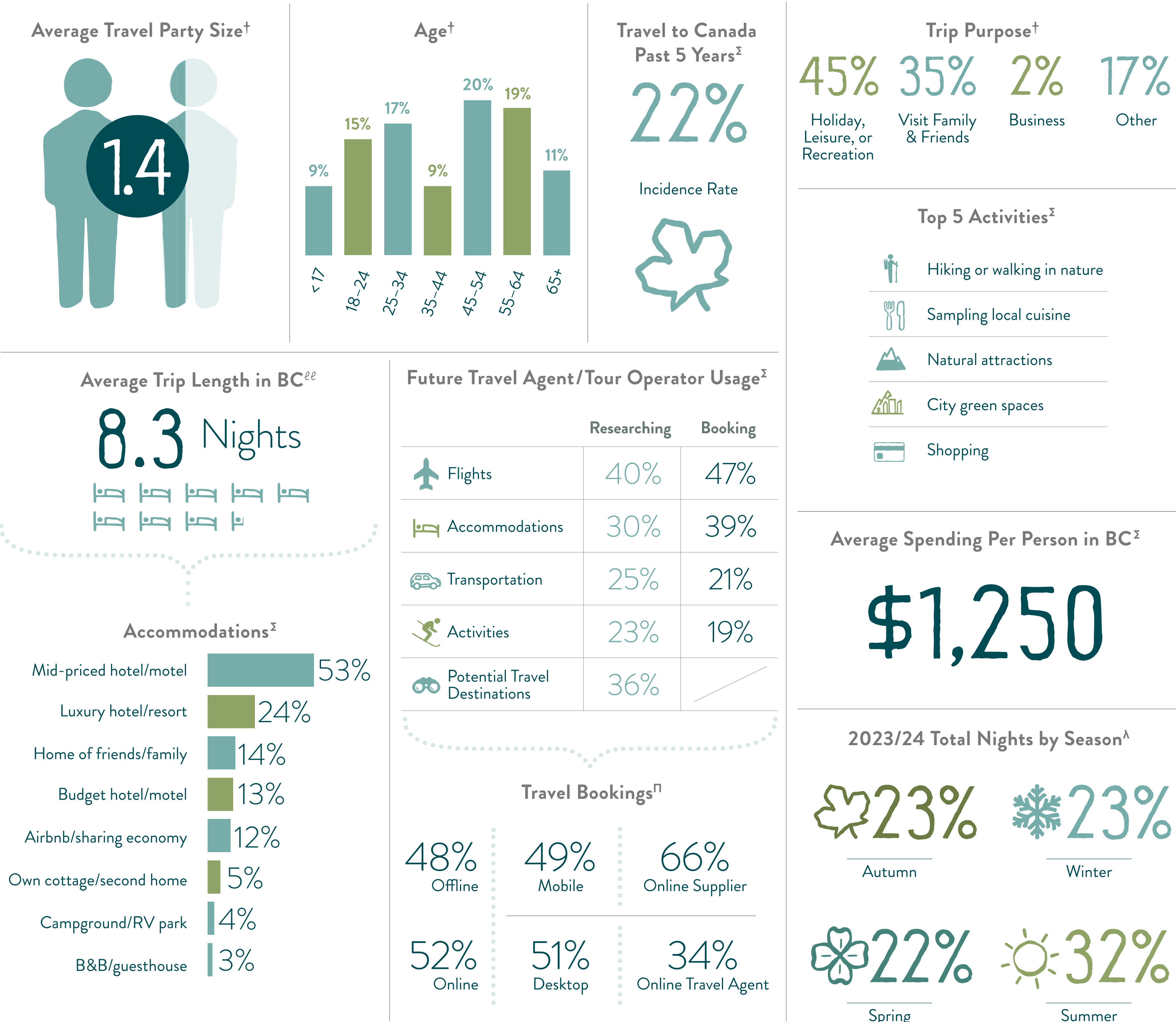
MARKET PROFILES

South Korea

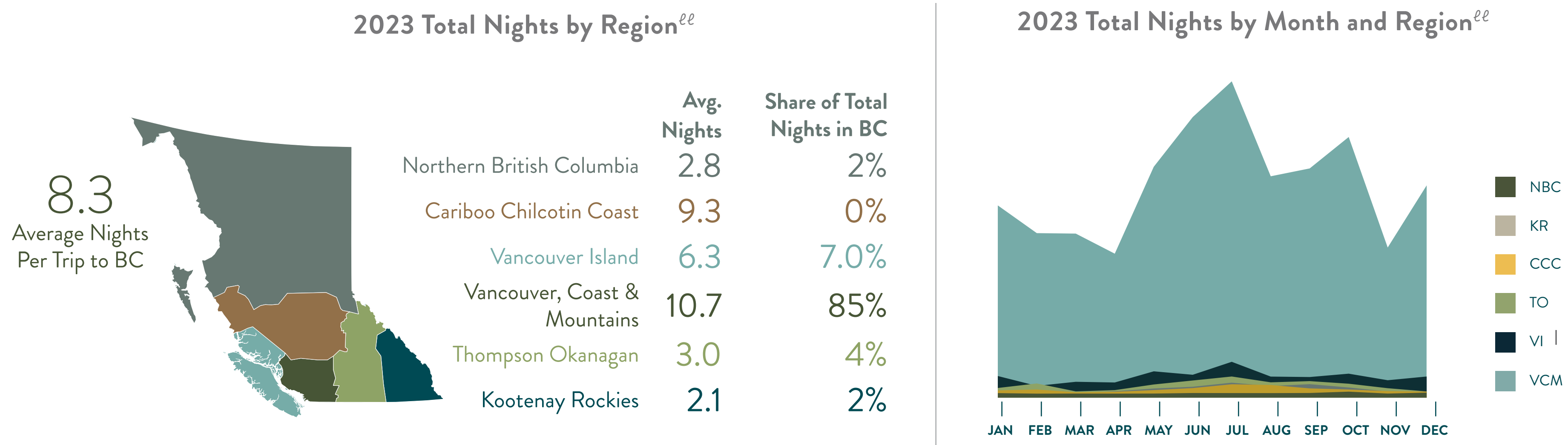
Traveller and trip characteristics are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs. Seasonal and geographical dispersion is reflective of 2023.

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Traveller and Trip Characteristics



Dispersion





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# United Kingdom

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Market Overview

2023 Overnight Outbound Departures from United Kingdom<sup>Q</sup>

71,568,100

Change in Overnight Departures From 2022: 24.2%

Future Travel Indicators

Air Capacity to BC in 2023<sup>Q</sup>



-7.2%

Change Over 2022

Flight Bookings in 2023<sup>Q</sup>

+8.4%

Change Over 2022

2023 Market Visitation Rank<sup>††</sup>

#8

United Kingdom was the 8th Largest International Market for BC in 2023

2023 Market Status<sup>§</sup>

Grow Brand Affinity  
Geographic Dispersion

2022 Market Potential

17%

Likelihood to Visit BC Within the Next Two Years<sup>ΣΣ</sup>

3.5M

2022 Potential Demand<sup>††</sup>

2023 Seasonal Dispersion Change<sup>Δ</sup>

+2.2

PT

2023 Off Peak Nights 78.1%

Seasonal Dispersion is the % of nights spent in BC for all months outside of peak months of July and August.

2023 Geographical Dispersion Change<sup>Δ</sup>

+3.3

PT

2023 Emerging Destination Nights 67.4%

Geographic Dispersion is the % of nights spent in BC for all destinations considered to be emerging.

BC Performance

2023 Estimated Visitation<sup>††</sup>



240,000

21%

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

260,000 2024 Forecasted Visitation

2023 Estimated Expenditure<sup>††</sup>



\$352M

17%

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

\$396.2M 2024 Forecasted Expenditures

2023 BC Travel Search Queries<sup>Δ</sup>



+60%

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%.



62% are likely to visit British Columbia in the next two years.<sup>β</sup>



Flight capacity from the UK during the peak summer month of 2024 hit record levels, surpassing the same period before the pandemic in 2019. The growth was attributed to airlines continuing to introduce larger aircraft to their fleets, including on UK routes, and also “densifying” their aircraft to fit more seats.<sup>Q</sup>



In December 2023, 48% of UK residents were planning an international holiday in the next 12 months.

Among UK residents, 44% said the greatest barrier to travel was price, with another 33% saying the greatest barrier was the cost of accommodation.<sup>β</sup>



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%.<sup>μ</sup>



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.<sup>λ</sup>



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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)  
Q Tourism Economics (2022)  
✓ Brand USA's International Travel & Consumer Sentiment Survey (May 2022)

- < Destination Canada's Market Highlights, 2022  
μ Destination Canada's Global Tourism Watch (2021)  
β Destination Canada Market Profiles (2024)  
Q Travel Weekly (Cirium Aviation Analytics)  
λ Destination BC's Tabulations: Visitor Nights by Season (Sept 2023–Aug 2024)

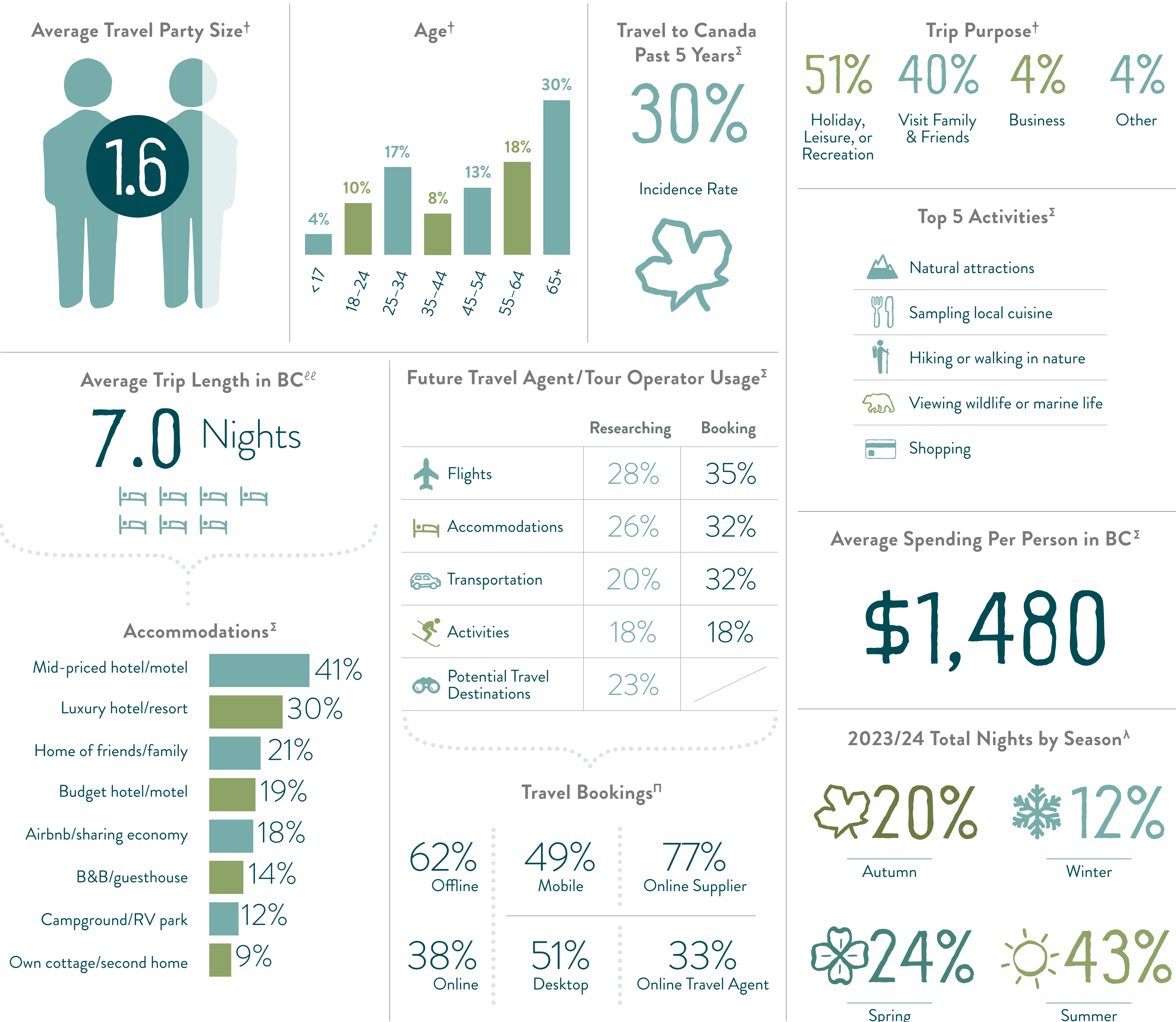
MARKET PROFILES

# United Kingdom

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## Traveller and Trip Characteristics



## Dispersion

