



CHINA

GERMANY

JAPAN

MEXICO

SOUTH KOREA

UNITED KINGDOM

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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.ΣΣ



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

* 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
Δ Google InVITE Travel Search Queries (2019 vs 2018)
ΣΣ Australian Government (November 2021)

≈ Tourism Australia (September 2021)
ΠΠ Executive Traveller, Qantas to fly Sydney-Vancouver All Year Round (September 2021)
◊ ForwardKeys (2019)



MARKET PROFILES
Australia

NOVEMBER 2021

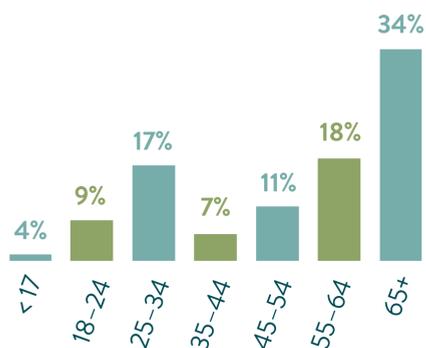


Traveller and Trip Characteristics

Average Travel Party Size^Q



Age^Q



Top 3 EQ Types^Σ

- Social Samplers
- Cultural Explorers
- No Hassle Travellers

Past Visitation to Canada[†]

33%

Trip Purpose^Q



Top 5 Activities^Σ

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

Average Spending Per Person in BC^Σ

\$1,814

Average Trip Length in BC^{††}

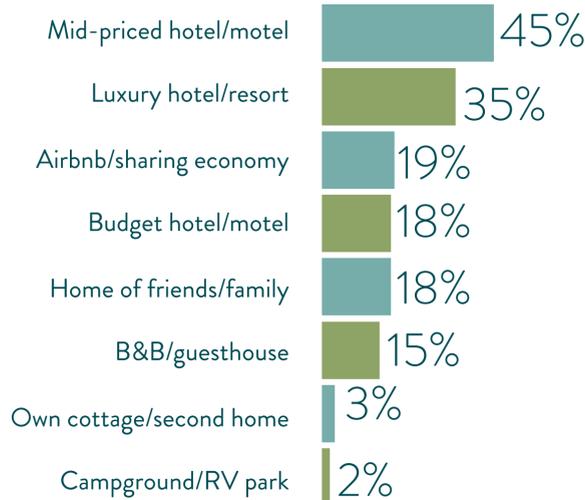
12.4 Nights



Travel Agent/Tour Operator Usage^Σ

	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		

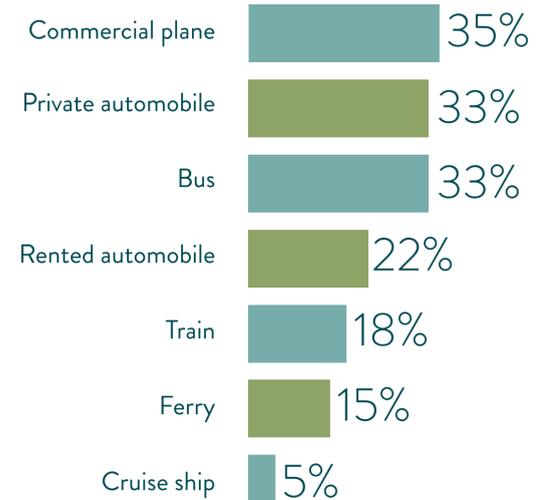
Accommodations^Σ



Travel Seasons^Q



Transportation Used During Trip^Q



Travel Bookings^Π

50% Offline

50% Online

20% Mobile

68% Online Supplier

80% Desktop

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.††

MARKET PROFILES
China

NOVEMBER 2021

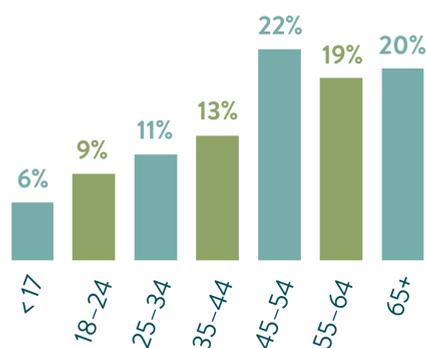


Traveller and Trip Characteristics

Average Travel Party Size^Q



Age^Q



Top 3 EQ Types^Σ

- Free Spirits
- Aspiring Escapists
- Gentle Explorers

Past Visitation to Canada[†]

22%

Trip Purpose^Q



Top 5 Activities^Σ

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

Average Spending Per Person in BC^Σ

\$2,021

Average Trip Length in BC^{††}

28.1 Nights



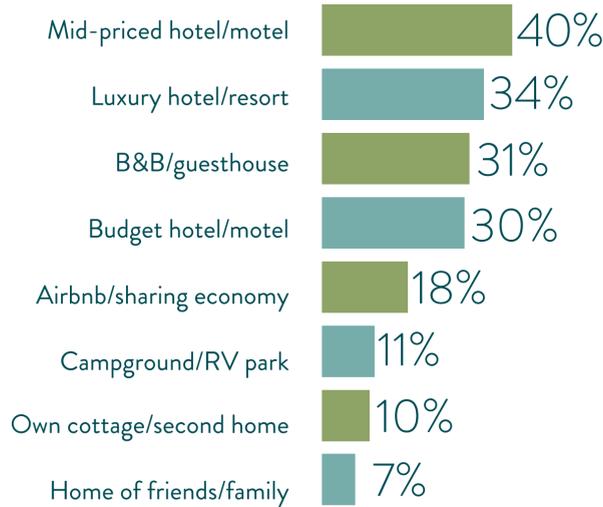
Travel Seasons^Q



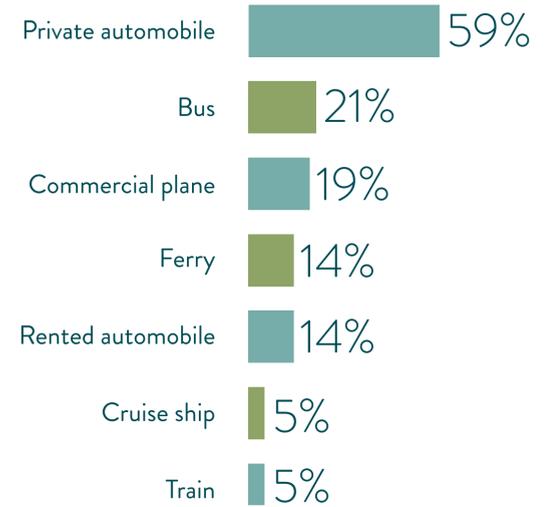
Travel Agent/Tour Operator Usage^Σ

	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		

Accommodations^Σ



Transportation Used During Trip^Q



Travel Bookings^Π

39% Offline

61% Online

84% Mobile

16% Desktop

44% Online Supplier

56% Online Travel Agent

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.¹



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.²

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)

MARKET PROFILES
Germany

NOVEMBER 2021

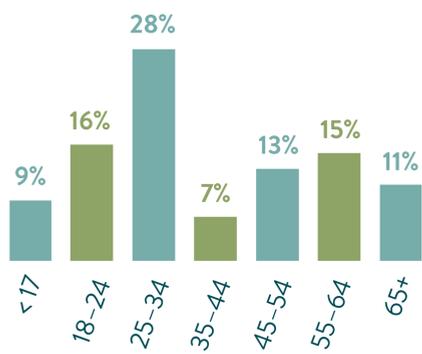


Traveller and Trip Characteristics

Average Travel Party Size^Q



Age^Q



Top 3 EQ Types^Σ

- Group Tourists
- Authentic Experiencers
- Cultural Explorers

Past Visitation to Canada[†]

25%

Trip Purpose^Q



Top 5 Activities^Σ

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

Average Spending Per Person in BC^Σ

\$1,543

Average Trip Length in BC^{††}

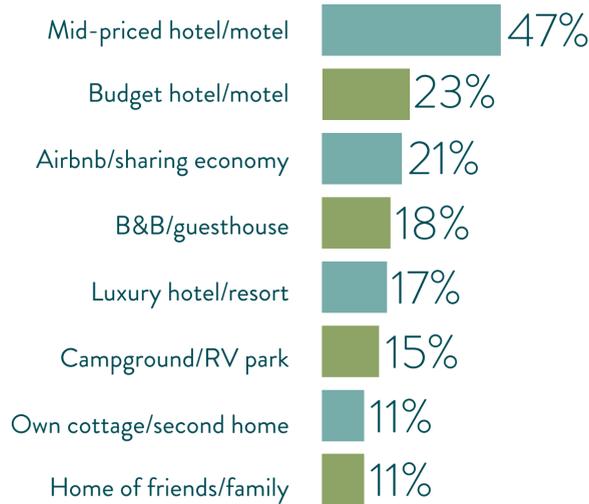
14.3 Nights



Travel Agent/Tour Operator Usage^Σ

	Researching	Booking
✈ Flights	37%	32%
🏠 Accommodations	28%	24%
🚗 Transportation	18%	17%
🏃 Activities	24%	9%
🎯 Potential Travel Destinations	22%	
14% Did not use a travel agent		

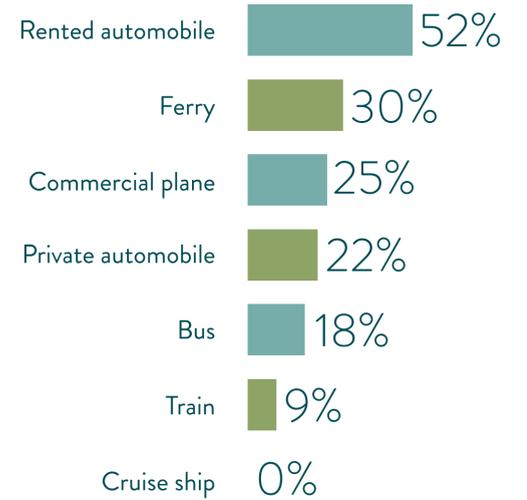
Accommodations^Σ



Travel Seasons^Q



Transportation Used During Trip^Q



Travel Bookings^Π

50% Offline

50% Online

35% Mobile

65% Desktop

61% Online Supplier

39% Online Travel Agent

MARKET PROFILES

Japan

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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.³As 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.⁴

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 2021)
 ◇ 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)

MARKET PROFILES

Japan

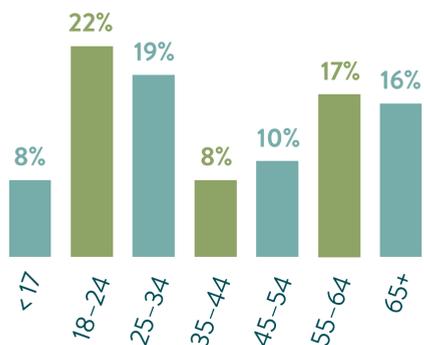
NOVEMBER 2021

Traveller and Trip Characteristics

Average Travel Party Size^Q



Age^Q



Top 3 EQ Types^Σ

- Cultural Historians
- Free Spirits
- Personal History Buffs

Past Visitation to Canada[†]

30%

Trip Purpose^Q



Top 5 Activities^Σ

- Natural attractions
- Hiking or walking in nature
- Shopping
- Sampling local cuisine
- City/town sightseeing

Average Spending Per Person in BC^Σ

\$1,610

Average Trip Length in BC^{††}

11.7 Nights



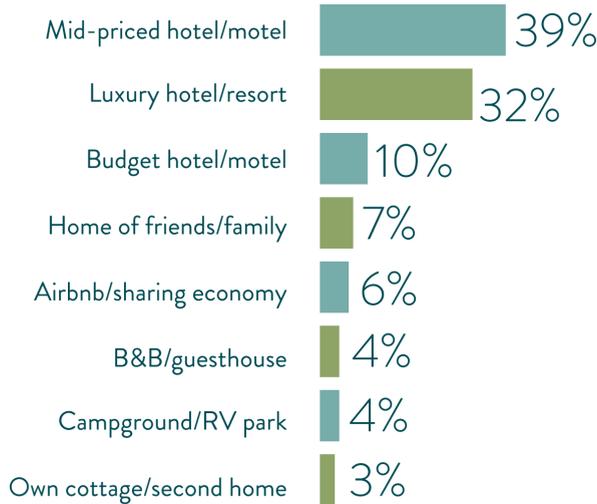
Travel Seasons^Q



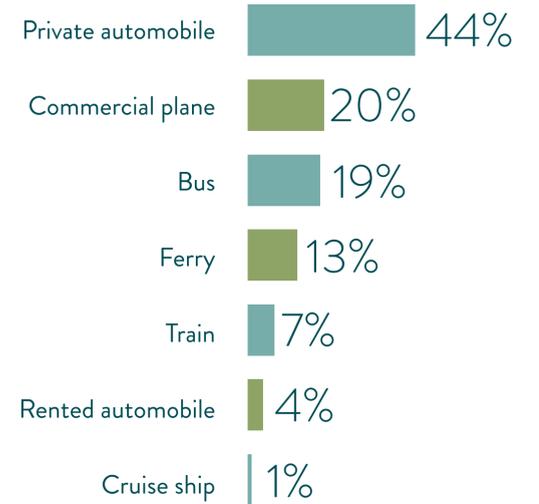
Travel Agent/Tour Operator Usage^Σ

	Researching	Booking
✈ Flights	36%	42%
🏠 Accommodations	37%	43%
🚗 Transportation	16%	15%
🎿 Activities	26%	17%
🎮 Potential Travel Destinations	37%	
16% Did not use a travel agent		

Accommodations^Σ



Transportation Used During Trip^Q



Travel Bookings^Π



MARKET PROFILES
Mexico

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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)
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 ** 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)

MARKET PROFILES

Mexico

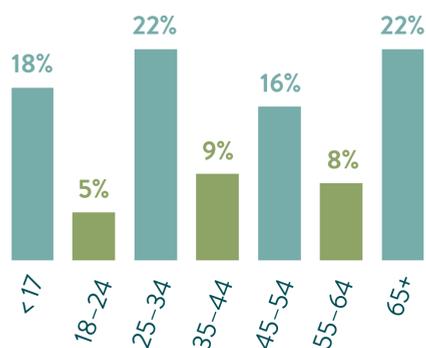
NOVEMBER 2021

Traveller and Trip Characteristics

Average Travel Party Size^Q



Age^Q



Top 3 EQ Types^Σ

- Authentic Experiencers
- Free Spirits
- Group Tourists & Social Samplers

Past Visitation to Canada[†]

30%

Trip Purpose^Q



Top 5 Activities^Σ

- Nature parks
- Hiking or walking in nature
- Sampling local cuisine
- Natural attractions
- Snowshoeing or cross country skiing

Average Spending Per Person in BC^Σ

\$1,761

Average Trip Length in BC^{††}

20.1 Nights



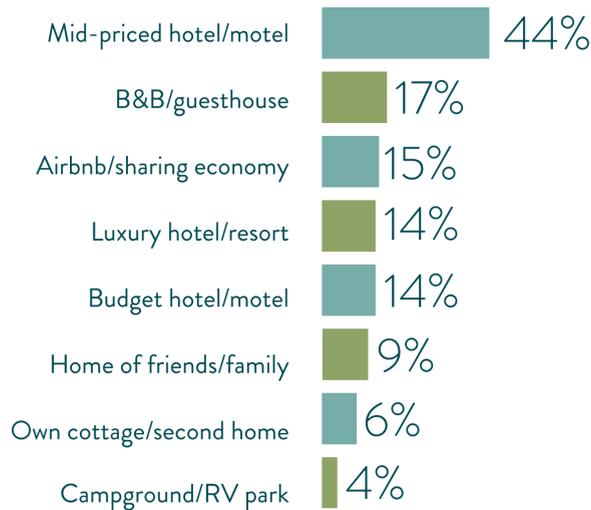
Travel Seasons^Q



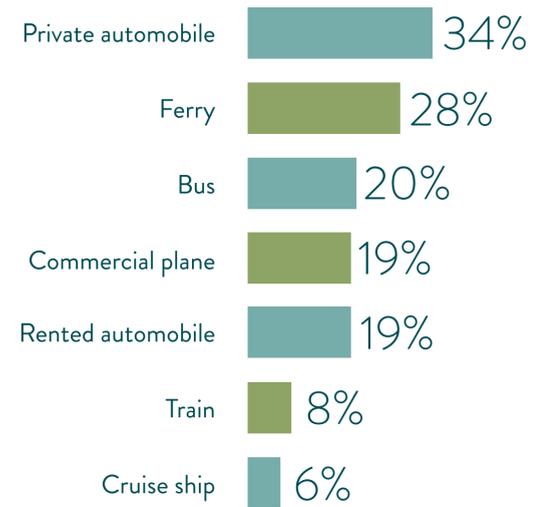
Travel Agent/Tour Operator Usage^Σ

	Researching	Booking
✈ Flights	36%	42%
🏠 Accommodations	37%	43%
🚗 Transportation	16%	15%
🏃 Activities	26%	17%
🎯 Potential Travel Destinations	37%	
16% Did not use a travel agent		

Accommodations^Σ



Transportation Used During Trip^Q



Travel Bookings^Π

59% Offline

41% Online

5% Mobile

45% Online Supplier

95% Desktop

55% Online Travel Agent

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)
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 †††† 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

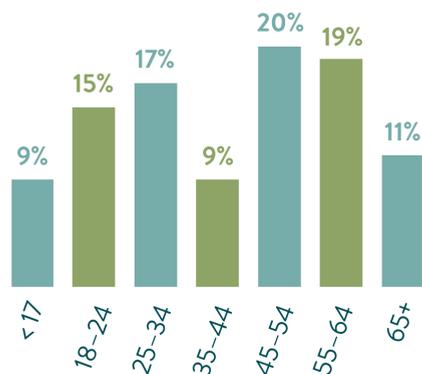
NOVEMBER 2021

Traveller and Trip Characteristics

Average Travel Party Size^Q



Age^Q



Top 3 EQ Types^Z

- Free Spirits
- Cultural Historians
- Personal History Buffs

Past Visitation to Canada[†]

22%

Trip Purpose^Q



Top 5 Activities^Z

- Hiking or walking in nature
- Sampling local cuisine
- Natural attractions
- City green spaces
- Shopping

Average Spending Per Person in BC^Z

\$1,159

Average Trip Length in BC^{††}

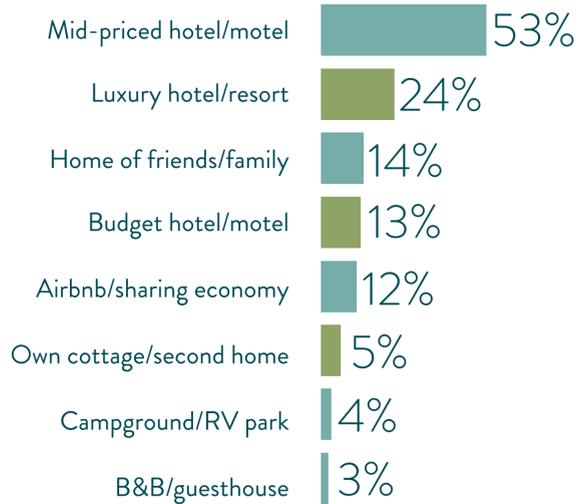
12.6 Nights



Travel Agent/Tour Operator Usage^Z

	Researching	Booking
✈ Flights	40%	47%
🏠 Accommodations	30%	39%
🚗 Transportation	25%	21%
🏃 Activities	23%	19%
🎯 Potential Travel Destinations	36%	
15% Did not use a travel agent		

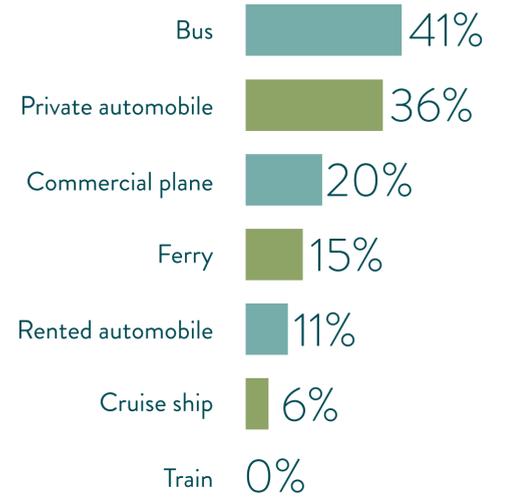
Accommodations^Z



Travel Seasons^Q



Transportation Used During Trip^Q



Travel Bookings^{††}





MARKET PROFILES

United Kingdom

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 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.⁸



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.[◊]



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.^{◊◊}

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

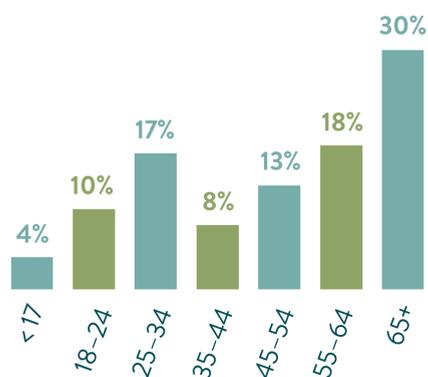
NOVEMBER 2021

Traveller and Trip Characteristics

Average Travel Party Size^Q



Age^Q



Top 3 EQ Types^Σ

- Free Spirits
- Gentle Explorers
- Authentic Experiencers

Past Visitation to Canada[†]

37%

Trip Purpose^Q



Top 5 Activities^Σ

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

Average Spending Per Person in BC^Σ

\$1,370

Average Trip Length in BC^{††}

10.9 Nights



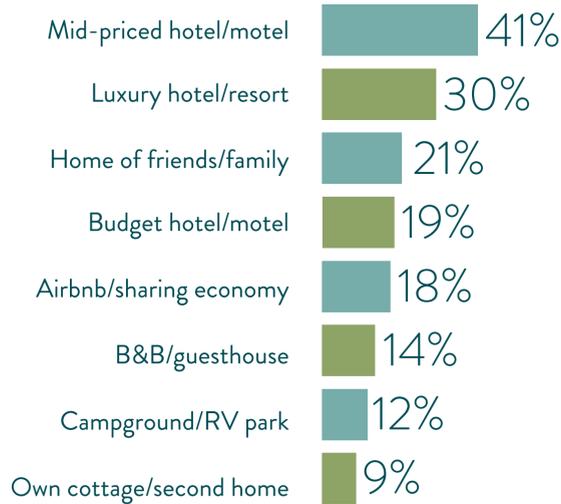
Travel Seasons^Q



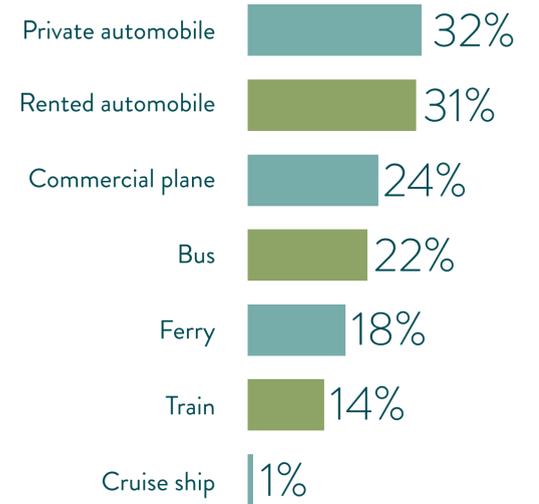
Travel Agent/Tour Operator Usage^Σ

	Researching	Booking
✈ Flights	28%	35%
🏠 Accommodations	26%	32%
🚗 Transportation	20%	32%
🏃 Activities	18%	18%
🎯 Potential Travel Destinations	23%	
18% Did not use a travel agent		

Accommodations^Σ



Transportation Used During Trip^Q



Travel Bookings^Π

31% Offline

69% Online

41% Mobile

59% Desktop

74% Online Supplier

26% Online Travel Agent