



MARKET OVERVIEW

99,063,000 Overnight outbound departures from Germany (+2%)

MARKET POTENTIAL[†]



POTENTIAL DEMAND[†]

2,656M

BC RANK"

Germany is the 5th largest international

market for BC

MARKET STATUS'''

Maintain our strength

BC PAST PERFORMANCE

VISITATION [1]



Annual growth rate (2013–2017)



45%**
BC's share of
Canadian
German visitation

EXPENDITURES [1]



BC's share of Canadian German expenditures

NET PROMOTER SCORE †



Promoters 43% Passives 36% Detractors 21%

AIRLINE SEAT CAPACITY ‡



MARKET INSIGHTS

in the next 2 years



The German economy continues to perform well despite Europe's ongoing economic challenges.



Unemployment in Germany continues to be at a record low.



Germany's gross global travel bookings have remained relatively flat over the last two years, at \$85B.^[3]

#7

Germany was the second-largest European market for BC. Germany accounted for 19% of BC's total visitation from Europe.**

SHORT-TERM FORECAST (2019)

FORECAST VISITATION TO BC [1]

133,000



+4%

FORECAST EXPENDITURES TO BC [1]

\$221.1\\\



+6%

GDP GROWTH§



COST OF \$1 CDN DOLLAR ¶



1 0%

AIRLINE SEAT

CAPACITY [‡]

SEARCH QUERIES [2]

BC TRAVEL

TRAVELLER CHARACTERISTICS

TRAVEL PARTY"

TOP 3 EQ TYPES [4]

Cultural Explorers Virtual Travellers Group Tourists & Rejuvenators

PAST VISITATION TO CANADA[†]



SPENDING"



\$1,553 Average spending per person in BC

TOP 5 ACTIVITIES[†]



Hiking or walking in nature



Trying local food and drink





Natural attractions



City green spaces

TRAVEL SEASONS [5]



Summer









Nature parks



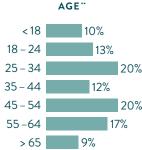
like mountains or waterfalls

like parks or gardens





TRIP PURPOSE"



65% Leisure Visit family 19% & friends



10%

Business

Other

TRAVEL AGENT/TOUR OPERATOR USAGE[†]





Accommodations Transportation









RESEARCHING 17% 27% 22% 10% 20% Potential travel destinations BOOKING 29% 13% 21% 11% Did not use a travel agent

TRAVEL BOOKINGS [3]



58% Offline Online

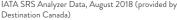
37% 63% Online travel agent Online supplier

75% 25% Desktop Mobile

IATA SRS Analyzer Data, August 2018 (provided by Destination Canada)

Destination BC Tabulations from the 2014 International Travel Survey (Statistics Canada)

OECD Bank of Canada



Google InVITE Travel Search Queries Phocuswright Destination Canada's EQ Research (2012) Statistics Canada; Prepared by Destination BC

Destination BC Internal Estimates

AVERAGE TRIP LENGTH IN BC"

13.7 Nights

ACCOMMODATIONS[†]

TRANSPORTATION USED DURING TRIP"

16%

15%

14%

12%

11%

10%

7%

3%

VISITS BY REGION®

46%

43%

41%

27% 20%

20%

11% Northern British Columbia 11% Cariboo Chilcotin Coast

84% Vancouver, Coast & Mountains

45% Thompson Okanagan

32% Kootenay Rockies

50% Vancouver Island

Mid-priced hotel/motel

Luxury hotel

Bed & breakfast

Budget hotel/motel

Rented house/apt/condo

Camping or trailer park

Home of friends/family

Rented automobile

Private automobile

Commercial plane

Cruise ship

Ferry

Bus

Train

DESTINATION BC | RESEARCH AND ANALYTICS MARKET PROFILES: GERMANY CONTACT US: TourismResearch@DestinationBC.ca

- Euromonitor
 - Destination BC Tabulations from the 2016 International Travel Survey (Statistics Canada)
- Destination BC Global Marketing Plan 2019

Destination Canada's Global Tourism Watch (2017)