



MARKET OVERVIEW

BC RANK**

British Columbia residents are BC's

#1 domestic market

MARKET POTENTIAL[†]

Likelihood to visit BC in next 2 years

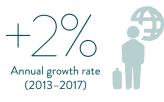


MARKET STATUS***

Invest for growth

BC PAST PERFORMANCE

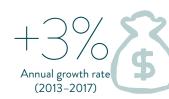
VISITATION[1]





BC's share of BC resident provincial visitation

EXPENDITURES[1]





NET PROMOTER SCORE†



Promoters 72% Passives 19% Detractors 9%

POSITIVE IMPRESSION OF BC[†]

FAMILIARITY OF BC[†]

88%

84%

MARKET INSIGHTS



The BC economy is strong but is challenged by labour shortages. BC has the highest job vacancy in Canada, and growth in the hourly wage is three times inflation.‡



Over half of BC residents travel in the fall, which is significantly higher than BC's other short-haul markets.†



From a brand perspective, BC's strongest differentiator remains the combination of easily accessible nature and wilderness, with both being in close proximity to cities.†

SHORT-TERM FORECAST (2019)

FORECAST VISITATION TO BC [1]



FORECAST EXPENDITURES TO BC [1]



BC TRAVEL SEARCH QUERIES [2]

GDP GROWTH[¶]



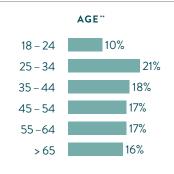
TRAVELLER CHARACTERISTICS

TRAVEL PARTY"



TOP 3 EO TYPES†

Free Spirits Authentic Experiencer



Gentle Explorers

PAST 5 YEAR TRAVEL TO BC[†]



TRAVEL SEASONS†









Winter

TRIP PURPOSE"



Leisure



Visit family 36% & friends



7%

Business



Other

TOP 5 ACTIVITIES[†]



Visit family & friends



City/town sightseeing



Shopping



Beaches, lakes & rivers



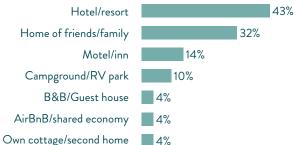
Sampling local cuisine

SPENDING"



\$311

Average spending per person in BC

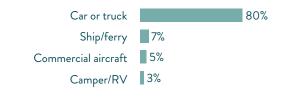


AVERAGE TRIP LENGTH IN BC"

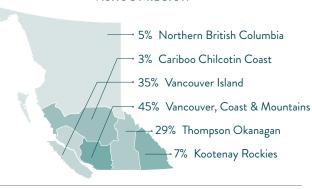
3.0 Nights

ACCOMMODATIONS

TRANSPORTATION USED DURING TRIP"



VISITS BY REGION†



TRAVEL BOOKINGS [3]



59% 41% Offline

63% Online travel agent Online supplier

6% Desktop Mobile

DESTINATION BC | RESEARCH AND ANALYTICS MARKET PROFILES: BRITISH COLUMBIA

- Destination BC Tabulations from the 2017 Traveller Survey of Residents of Canada (Statistics Canada)
- Destination BC Global Marketing Plan 2019

- Destination BC's Key Performance Indicators Consumer Research (2017)
- Business Council of British Columbia OECD

- RBC Economic Reports
- Destination BC Internal Estimates
- Google InVITE Travel Search Queries Phocuswright