



MARKET PROFILES ONTARIO



MARKET OVERVIEW

BC RANK**

Ontario residents are BC's **#3rd domestic market**

<p>MARKET POTENTIAL[†]</p> <p>Likelihood to visit BC in next 2 years</p> <p>23%</p>	<p>MARKET STATUS***</p> <p>Maintain out strength</p>
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MARKET INSIGHTS

- Ontario's economy is expected to remain unchanged in 2018. There might be a decrease in net migration and a decline in the unemployment rate.[◇]
- Ontario travellers are equally likely to travel in the summer as in the winter.[†]
- From a brand perspective, BC's strongest differentiator is its "beautiful natural scenery" as well as "easily accessible nature and wilderness" and "a place that has nature that uplifts and inspires."^{††}

BC PAST PERFORMANCE

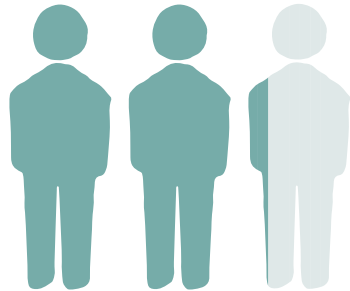
<p>VISITATION^[1]</p> <p>+6% Annual growth rate (2013-2017)</p> <p>2%** BC's share of Ontario resident provincial visitation</p>	<p>EXPENDITURES^[1]</p> <p>+19% Annual growth rate (2013-2017)</p> <p>9%** BC's share of Ontario resident provincial expenditures</p>	<p>NET PROMOTER SCORE[†]</p> <p>55</p> <p>Promoters 63% Passives 28% Detractors 8%</p> <p>AIRLINE SEAT CAPACITY[†]</p> <p>+5%</p>
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SHORT-TERM FORECAST (2019)

<p>FORECAST VISITATION TO BC^[1]</p> <p>905,000</p> <p>+3%</p>	<p>FORECAST EXPENDITURES TO BC^[1]</p> <p>\$1,225.6M</p> <p>+5%</p>	
<p>AIRLINE SEAT CAPACITY[†]</p> <p>0%</p>	<p>BC TRAVEL SEARCH QUERIES^[2]</p> <p>+3%</p>	<p>GDP GROWTH[§]</p> <p>+2%</p>

TRAVELLER CHARACTERISTICS

TRAVEL PARTY**

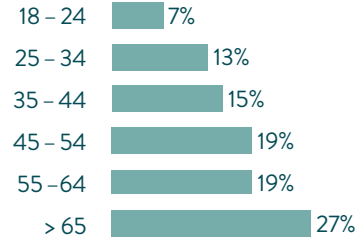


2.2

TOP 3 EQ TYPES†

Gentle Explorers
Authentic Experiercer
Free Spirits

AGE**



SPENDING**



\$1,292
Average spending per person in BC

PAST 5 YEAR TRAVEL TO BC†

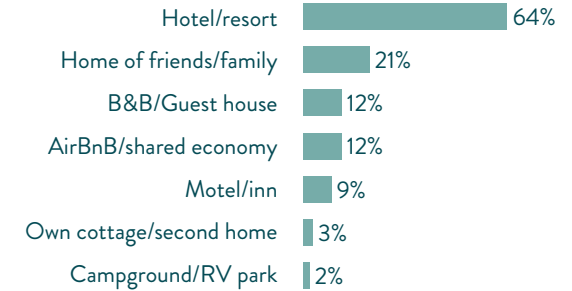


AVERAGE TRIP LENGTH IN BC**

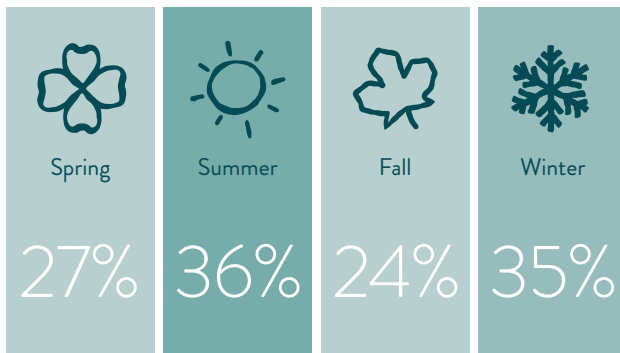
10.9 Nights



ACCOMMODATIONS†



TRAVEL SEASONS†



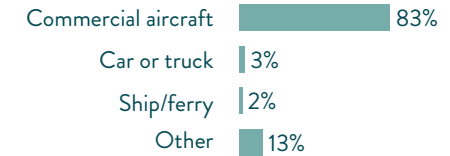
TRIP PURPOSE**



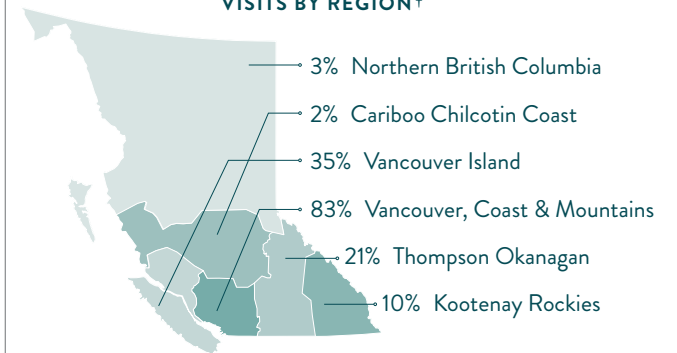
TOP 5 ACTIVITIES†



TRANSPORTATION USED DURING TRIP**



VISITS BY REGION†



TRAVEL BOOKINGS^[3]

