



# MARKET PROFILES UNITED KINGDOM



DESTINATION  
BRITISH COLUMBIA™

## MARKET OVERVIEW



<b>MARKET POTENTIAL<sup>†</sup></b> <p>Likelihood to visit BC in the next 2 years</p>	<b>POTENTIAL DEMAND<sup>†</sup></b> <p>2,796M</p>	<b>BC RANK**</b> <p>United Kingdom is the 3<sup>rd</sup> largest international market for BC</p>
<b>MARKET STATUS***</b> <p>Maintain our strength</p>		

## MARKET INSIGHTS

- Visitation forecasts anticipate small growth due to a reduction in the visiting friends and relatives and business travel, not a significant decrease in the leisure market.<sup>[1]</sup>
- There is an opportunity, thanks to the increased value of the UK pound against the CDN dollar.
- Brexit negotiations are proceeding but have not impacted travel bookings.
- UK was the largest Europe market for BC. UK accounted for 36% of BC's total visitation from Europe.\*\*

## BC PAST PERFORMANCE

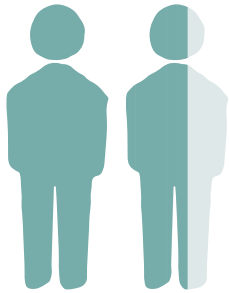
<b>VISITATION<sup>[2]</sup></b> <p>+6% Annual growth rate (2013-2017)</p>	<b>EXPENDITURES<sup>[2]</sup></b> <p>+7% Annual growth rate (2013-2017)</p>	<b>NET PROMOTER SCORE<sup>†</sup></b> <p>Promoters 37% Passives 44% Detractors 19%</p>
<p>36%** BC's share of Canadian UK visitation</p>	<p>38%** BC's share of Canadian UK expenditures</p>	<b>AIRLINE SEAT CAPACITY<sup>†</sup></b> <p>-1%</p>

## SHORT-TERM FORECAST (2019)

<b>FORECAST VISITATION TO BC<sup>[2]</sup></b> <p>286,000</p> <p>+2%</p>	<b>FORECAST EXPENDITURES TO BC<sup>[2]</sup></b> <p>\$423 M</p> <p>+4%</p>		
<b>AIRLINE SEAT CAPACITY<sup>†</sup></b> <p>0%</p>	<b>BC TRAVEL SEARCH QUERIES<sup>[3]</sup></b> <p>+4%</p>	<b>GDP GROWTH<sup>§</sup></b> <p>+1%</p>	<b>COST OF \$1 CDN DOLLAR<sup>¶</sup></b> <p>£ 0.60 GBP (-3%)</p>

# TRAVELLER CHARACTERISTICS

## TRAVEL PARTY\*\*



1.6

## TOP 3 EQ TYPES<sup>[5]</sup>

Gentle Explorers  
Authentic Experiencers  
Free Spirits

## PAST VISITATION TO CANADA<sup>†</sup>

40%

## SPENDING\*\*

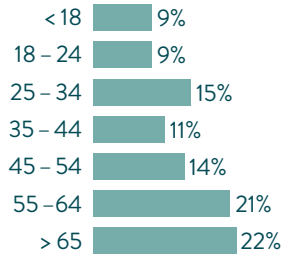
\$1,380  
Average spending per person in BC

## AVERAGE TRIP LENGTH IN BC\*\*

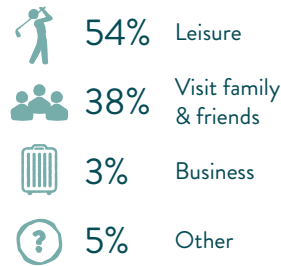
12.3 Nights



## AGE\*\*



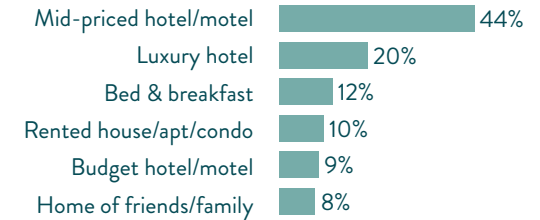
## TRIP PURPOSE\*\*



## TOP 5 ACTIVITIES<sup>†</sup>



## ACCOMMODATIONS<sup>†</sup>

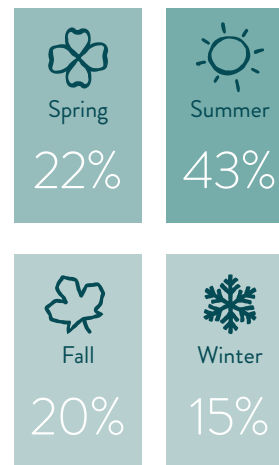


## TRAVEL AGENT/TOUR OPERATOR USAGE<sup>†</sup>

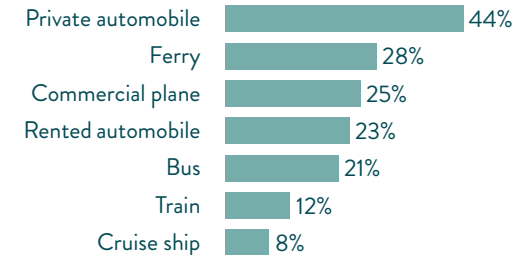


RESEARCHING	19%	17%	8%	7%	13% Potential travel destinations
	31%	23%	15%	10%	
BOOKING					

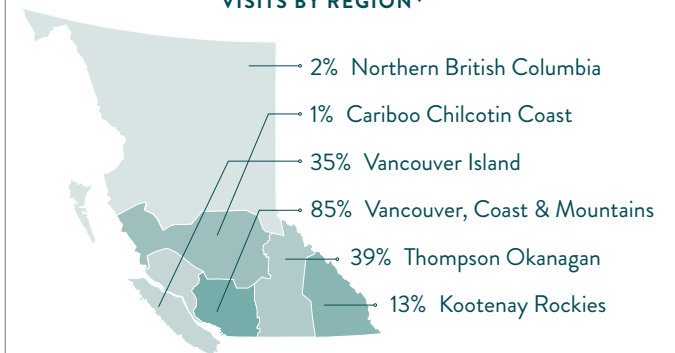
## TRAVEL SEASONS<sup>[6]</sup>



## TRANSPORTATION USED DURING TRIP\*\*



## VISITS BY REGION<sup>◇</sup>



## TRAVEL BOOKINGS<sup>[4]</sup>

