



MARKET OVERVIEW

W.

84,058,800

Overnight outbound departures from UK (+4%)

MARKET POTENTIAL[†]



Likelihood to visit BC in the next 2 years

POTENTIAL DEMAND[†]

2,796M

ID†

United Kingdom is the $\frac{3}{3} rd$ largest international

market for BC

BC RANK"

MARKET STATUS"

Maintain our strength

BC PAST PERFORMANCE

VISITATION [2]



Annual growth rate (2013–2017)





EXPENDITURES [2]



38%

BC's share of
Canadian
UK expenditures

NET PROMOTER SCORE



Promoters 37% Passives 44% Detractors 19%

AIRLINE SEAT CAPACITY[‡]



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.^[1]



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.**

SHORT-TERM FORECAST (2019)

FORECAST VISITATION TO BC [2]

286,000



FORECAST EXPENDITURES TO BC [2]

\$423 \{\}



AIRLINE SEAT



BC TRAVEL SEARCH QUERIES [3]



GDP GROWTH§



COST OF \$1 CDN DOLLAR ¹¹



TRAVELLER CHARACTERISTICS

TRAVEL PARTY"

TOP 3 EQ TYPES [5]

Gentle Explorers Authentic Experiencers Free Spirits

PAST VISITATION TO CANADA[†]



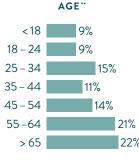
SPENDING"



\$1,380

Average spending per person in BC

TRIP PURPOSE"







TOP 5 ACTIVITIES[†]



Trying local food and drink



Natural attractions like mountains or waterfalls



City green spaces like parks or gardens



Hiking or walking in nature



Art galleries or museums

TRAVEL AGENT/TOUR OPERATOR USAGE[†]





Accommodations Transportation









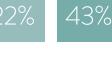
Other

RESEARCHING	19%	17%	8%	7%	13% Potential travel destinations
BOOKING	31%	23%	15%	10%	57% Did not use a travel agent

TRAVEL SEASONS [6]











AVERAGE TRIP LENGTH IN BC"

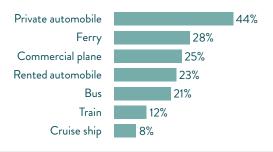
12.3 Nights



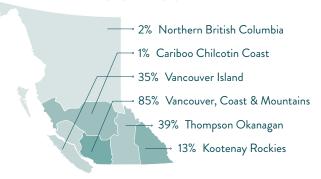
ACCOMMODATIONS[†]



TRANSPORTATION USED DURING TRIP"



VISITS BY REGION®



TRAVEL BOOKINGS [4]



59% Offline

26%

74% Online travel agent Online supplier

Euromonitor

28% Desktop Mobile

DESTINATION BC | RESEARCH AND ANALYTICS

Destination BC Tabulations from the 2016 International Travel Survey (Statistics Canada)

Destination BC Global Marketing Plan 2019

Destination Canada's Global Tourism Watch (2017)

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

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