



MARKET OVERVIEW

2103,804,600

Overnight outbound departures from US (+8%)

MARKET POTENTIAL[†]



POTENTIAL DEMAND[†]

25,975M

BC RANK"

USA is the

largest international market for BC

MARKET STATUS'''

Invest for growth

MARKET INSIGHTS

in the next 2 years



Currently, US auto overnight arrivals into BC have shown growth YTD in 2018 (+3.3% January–July).^[5]



There is an opportunity, thanks to the increased value of the US dollar against the CDN dollar.



The US economy continues to be strong; real GDP increased at an annual rate of 4.2% in the second quarter of 2018.^[6]



US is the largest international market for BC, accounting for 65% of BC's total international visitation.**

BC PAST PERFORMANCE

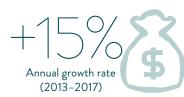
VISITATION [1]



Annual growth rate (2013–2017)



BC's share of Canadian American visitation EXPENDITURES [1]





NET PROMOTER SCORE †



Promoters 43%
Passives 38%
Detractors 19%

AIRLINE SEAT CAPACITY ‡



SHORT-TERM FORECAST (2019)

FORECAST VISITATION TO BC[1]

3,659,000



FORECAST EXPENDITURES TO BC[1]

\$2,505/\



AIRLINE SEAT CAPACITY[‡]



BC TRAVEL SEARCH QUERIES [2]



GDP GROWTH§



COST OF \$1 CDN DOLLAR ¹¹



TRAVELLER CHARACTERISTICS

TRAVEL PARTY"

TOP 3 EQ TYPES [5]

Gentle Explorers Free Spirits Personal History Explorers

AGE"

8%

8%

16%

16%

19%

18%

14%

< 18

18 - 24

25 - 34

35 - 44

45 - 54

55 - 64

> 65

PAST VISITATION TO CANADA[†]



Leisure

Visit family

& friends

Business

Other

SPENDING"



\$630

Average spending per person in BC

TRIP PURPOSE" TOP 5 ACTIVITIES[†]



Trying local food and drink



Natural attractions like mountains or waterfalls

Nature parks



Shopping for items



Hiking or walking in nature

TRAVEL SEASONS [5]



Summer









that help me remember my trip





業 Winter

TRAVEL AGENT/TOUR OPERATOR USAGE[†]













25%

12%

Other

RESEARCHING 21% 22% 19% 13% 13% Potential travel destinations 54% BOOKING 11% 8% 14% Did not use a travel agent

TRAVEL BOOKINGS [3]



52% 48% Offline Online

39% 61% Online travel agent Online supplier



21% 79% Desktop Mobile

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

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

OECD

4% Thompson Okanagan 6% Kootenay Rockies

16% Vancouver Island

3% Northern British Columbia 1% Cariboo Chilcotin Coast

68% Vancouver, Coast & Mountains

DESTINATION BC | RESEARCH AND ANALYTICS MARKET PROFILES: UNITED STATES OF AMERICA 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)

Bank of Canada

Destination BC Internal Estimates

AVERAGE TRIP LENGTH IN BC"

4.2 Nights

ACCOMMODATIONS 1

TRANSPORTATION USED DURING TRIP"

Bus Ferry

Train

15%

12%

12%

11%

14%

10%

4%

VISITS BY REGION®

Mid-priced hotel/motel

Rented house/apt/condo

Home of friends/family

Camping or trailer park

Private automobile

Rented automobile

Commercial plane

Cruise ship

Budget hotel/motel

Bed & breakfast

Luxury hotel

36%

32%

55%

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