



MARKET OVERVIEW

2103,804,600

Overnight outbound departures from US (+8%)

MARKET POTENTIAL [5]



FAMILIARITY WITH BC^[5]

54%

BC RANK"

Washington is the #1

largest market for BC from the US

MARKET STATUS'''

Invest for growth

MARKET INSIGHTS

in the next 2 years



Land entries accounted for 98% of all Washington overnight visitor entries into BC; approximately 68% of BC's overnight automobile entries are from Washington visitors. [2]



In 2017, Washington was named CNBC's top state for business because their economy is growing faster than the national average, there is a large concentration of science, technology, engineering, and math workers, and they have the second most patents filed, after California.^[6]



Currently, BC's strongest differentiators are "has lots of opportunities to view wildlife," "beautiful natural scenery," and "is a place where you can feel the power of nature." [5]

BC PAST PERFORMANCE

VISITATION [2]

+3%

Annual growth rate (2013–2017)



76% share of Canadian Washington visitation

EXPENDITURES [2]

Annual growth rate (2013–2017)



NET PROMOTER SCORE [5]



Promoters 66%
Passives 22%
Detractors 12%

OVERNIGHT US AUTO ENTRIES TO BC[1]



SHORT-TERM FORECAST (2019)

FORECAST VISITATION TO BC[2]

1,455,000



FORECAST EXPENDITURES TO BC[2]

\$747.5M



+3%



BC TRAVEL SEARCH QUERIES [3]



COST OF \$1 CDN DOLLAR 1



TRAVELLER CHARACTERISTICS

TRAVEL PARTY"

TOP 3 EQ TYPES^[5]

Gentle Explorers Free Spirits Authentic Experiencer

PAST 5 YEAR VISITATION TO BC [5]

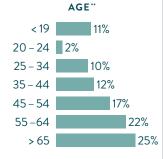


SPENDING"



Average spending per person in BC

TRIP PURPOSE"



	62%	Leisure
8	25%	Visit family & friends

Business





TOP 5 ACTIVITIES [5]



City/town sightseeing



Shopping



Trying local food and



Arts/culture/histoy and hiking

Visit family & friends

TRAVEL AGENT/TOUR OPERATOR USAGE[†]





Accommodations Transportation









Other

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



TRAVEL SEASONS [5]







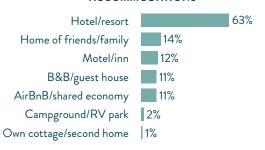




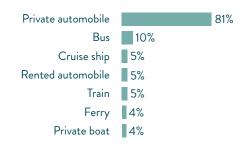
AVERAGE TRIP LENGTH IN BC"

3.8 Nights

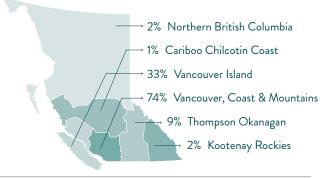
ACCOMMODATIONS^[5]



TRANSPORTATION USED DURING TRIP"



VISITS BY REGION^[5]



TRAVEL BOOKINGS [4]



52% 48% Offline Online

39%

61% Online travel agent Online supplier

79% 21% Desktop Mobile

DESTINATION BC | RESEARCH AND ANALYTICS

MARKET PROFILES: WASHINGTON CONTACT US: TourismResearch@DestinationBC.ca

- - Destination BC Tabulations from the 2016 International Travel Survey (Statistics Canada)
- Destination BC Global Marketing Plan 2019
- Destination Canada's Global Tourism Watch (2017)
- ForwardKeys
- OECD Bank of Canada
- Statistics Canada; Prepared by Destination BC
- Destination BC Internal Estimates

- Google InVITE Travel Search Queries
- Phocuswright
- Destination BC's Key Performance Indicators Consumer Research (2017)
- CNBC