



MARKET PROFILES
USA



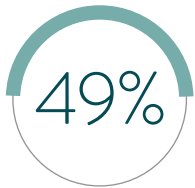
DESTINATION
BRITISH COLUMBIA™

MARKET OVERVIEW

103,804,600*

Overnight outbound departures from US (+8%)

MARKET POTENTIAL†



Likelihood to visit BC in the next 2 years

POTENTIAL DEMAND†

25,975M

BC RANK**

USA is the #1 largest international market for BC

MARKET STATUS***

Invest for growth

BC PAST PERFORMANCE

VISITATION [1]

+6%

Annual growth rate (2013-2017)



EXPENDITURES [1]

+15%

Annual growth rate (2013-2017)



NET PROMOTER SCORE †



Promoters 43%
Passives 38%
Detractors 19%



28%**

BC's share of Canadian American visitation



40%**

BC's share of Canadian American expenditures

AIRLINE SEAT CAPACITY †

+4%

MARKET INSIGHTS



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.**

SHORT-TERM FORECAST (2019)

FORECAST VISITATION TO BC [1]

3,659,000



FORECAST EXPENDITURES TO BC [1]

\$2,505M



AIRLINE SEAT CAPACITY †

-1%

BC TRAVEL SEARCH QUERIES [2]

+3%

GDP GROWTH †

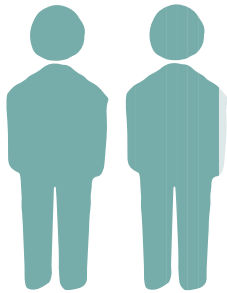
+3%

COST OF \$1 CDN DOLLAR †

0.77 USD (-3%)

TRAVELLER CHARACTERISTICS

TRAVEL PARTY**



1.9

TOP 3 EQ TYPES^[5]

- Gentle Explorers
- Free Spirits
- Personal History Explorers

PAST VISITATION TO CANADA[†]



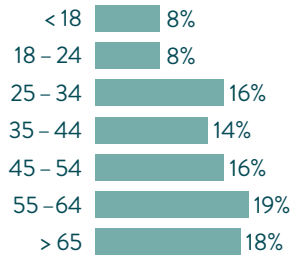
SPENDING**



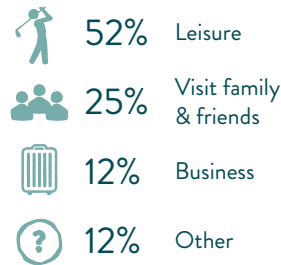
AVERAGE TRIP LENGTH IN BC**



AGE**



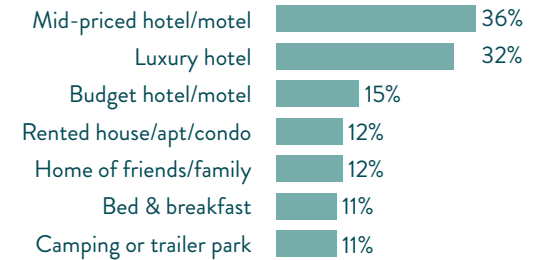
TRIP PURPOSE**



TOP 5 ACTIVITIES[†]

- Trying local food and drink
- Natural attractions like mountains or waterfalls
- Nature parks
- Shopping for items that help me remember my trip
- Hiking or walking in nature

ACCOMMODATIONS[†]

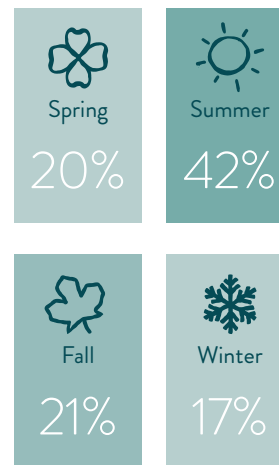


TRAVEL AGENT/TOUR OPERATOR USAGE[†]

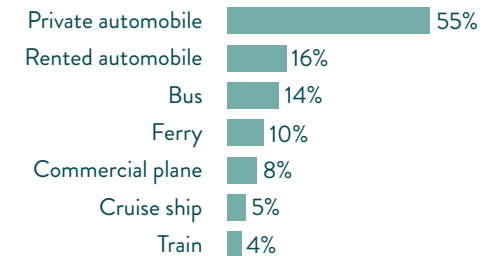
- Flights
- Accommodations
- Transportation
- Activities
- Other

RESEARCHING	22%	19%	13%	13%	21% Potential travel destinations
	19%	14%	11%	8%	
BOOKING					

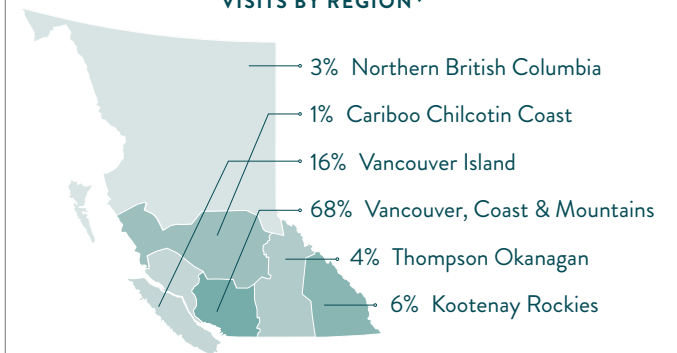
TRAVEL SEASONS^[5]



TRANSPORTATION USED DURING TRIP**



VISITS BY REGION[◊]



TRAVEL BOOKINGS^[3]

