



MARKET PROFILES WASHINGTON



MARKET OVERVIEW



<p>MARKET POTENTIAL^[5]</p> <p>Likelihood to visit BC in the next 2 years</p>	<p>FAMILIARITY WITH BC^[5]</p> <p>54%</p>	<p>BC RANK**</p> <p>Washington is the #1 largest market for BC from the US</p>
<p>MARKET STATUS**</p> <p>Invest for growth</p>		

MARKET INSIGHTS



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

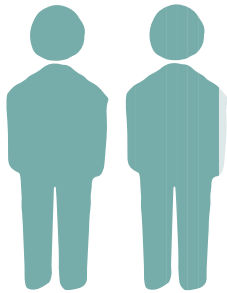
<p>VISITATION^[2]</p> <p>+3%</p> <p>Annual growth rate (2013-2017)</p> <p>76%**</p> <p>BC's share of Canadian Washington visitation</p>	<p>EXPENDITURES^[2]</p> <p>+18%</p> <p>Annual growth rate (2013-2017)</p> <p>76%**</p> <p>BC's share of Canadian Washington expenditures</p>	<p>NET PROMOTER SCORE^[5]</p> <p>54</p> <p>Promoters 66% Passives 22% Detractors 12%</p> <hr/> <p>OVERNIGHT US AUTO ENTRIES TO BC^[1]</p> <p>+3%</p>
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SHORT-TERM FORECAST (2019)

<p>FORECAST VISITATION TO BC^[2]</p> <p>1,455,000</p> <p>+1%</p>	<p>FORECAST EXPENDITURES TO BC^[2]</p> <p>\$747.5M</p> <p>+3%</p>
<p>BC TRAVEL SEARCH QUERIES^[3]</p> <p>-6%</p>	<p>COST OF \$1 CDN DOLLAR^[1]</p> <p>\$ 0.77 USD (-3%)</p>

TRAVELLER CHARACTERISTICS

TRAVEL PARTY**



1.9

TOP 3 EQ TYPES^[5]

Gentle Explorers
Free Spirits
Authentic Experienter

PAST 5 YEAR VISITATION TO BC^[5]

46%

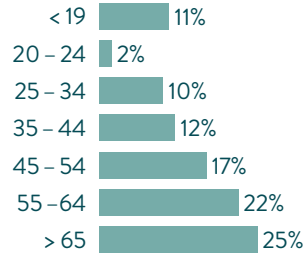
SPENDING**

\$441
Average spending per person in BC

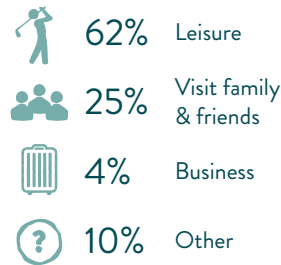
AVERAGE TRIP LENGTH IN BC**

3.8 Nights

AGE**



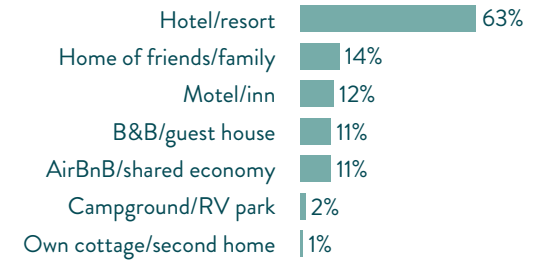
TRIP PURPOSE**



TOP 5 ACTIVITIES^[5]



ACCOMMODATIONS^[5]

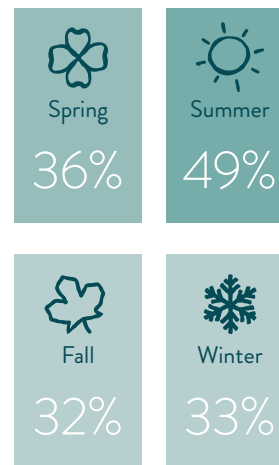


TRAVEL AGENT/TOUR OPERATOR USAGE[†]

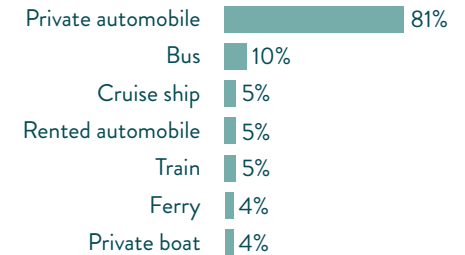


RESEARCHING	22%	19%	13%	13%	21% Potential travel destinations
	19%	14%	11%	8%	
BOOKING					54% Did not use a travel agent

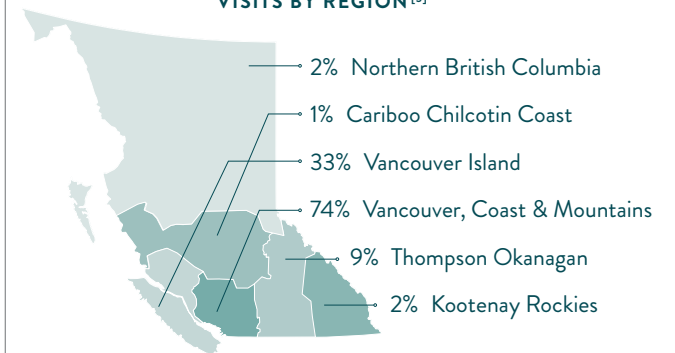
TRAVEL SEASONS^[5]



TRANSPORTATION USED DURING TRIP**



VISITS BY REGION^[5]



TRAVEL BOOKINGS^[4]

