

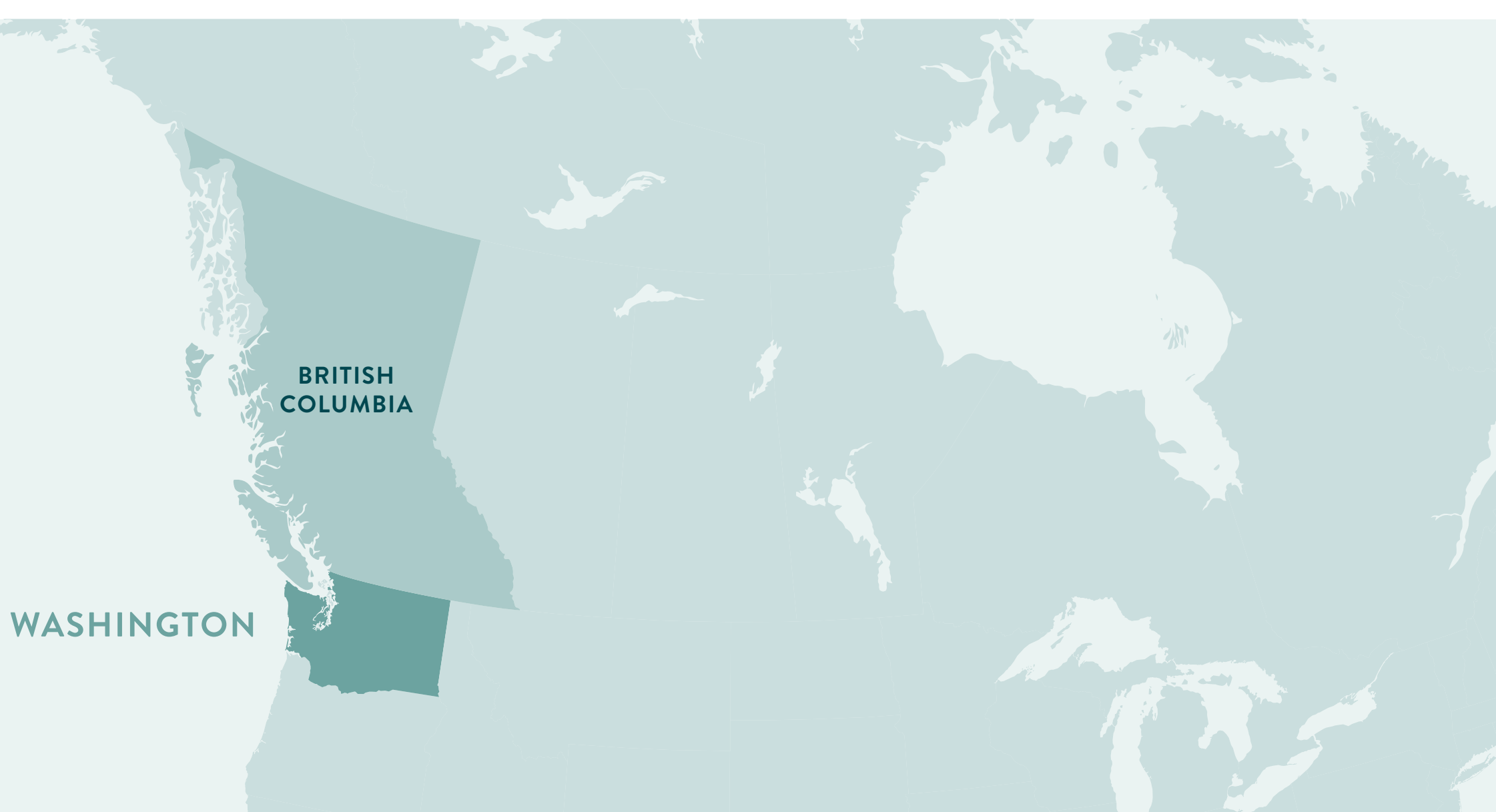


MARKET PROFILES

Washington

NOVEMBER 2021

The 2021 US Market Profiles contain the latest information and highlights on Destination BC's key US markets. This publication summarizes each market, pre-COVID (2019), including the size of the market, volume and expenditures in BC, and traveller and trip characteristics. The latest market highlights and factors impacting and helping recovery of the markets as a result of COVID are also included. Highlights and factors are ever-changing—as such, those available here are time-stamped from the date of publication.



Market Overview

2019 Market Visitation Rank ^{††}

#1

Washington was the #1 US market for BC in 2019

2019 Familiarity with BC ^{§§}

61%

2021 Market Status [§]

Monitor for Investment (WA)

BC Past Performance

2019 Reported Visitation ^{††}



1,528,000

84.0% BC's Share of 2019 Canadian Washington Visitation

2019 Reported Expenditure ^{††}



\$614.9M

72.1% BC's Share of 2019 Canadian Washington Expenditures

2019 Automobile Entries ^{†††}

+3.1%

2019 BC Travel Search Queries [△]

+6%

Factors Impacting/Helping Recovery

British Columbian's Comfort Welcoming US Visitors ^{††}

23%

Of BC residents are comfortable welcoming visitors from the US to their community

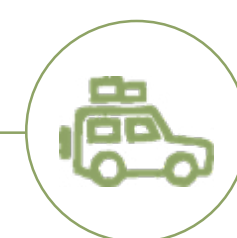


Willingness to Receive Vaccine [#]

73%

Support for Vaccine Passports for International Travel ^{**}

71%



American Perceptions of Travelling to Canada [™]

52%

believe Canada is safe to travel to

Canadian Border Opened to Fully-Vaccinated US Travellers

August 2021

Market Highlights



As of November 1st, 2021, 65% of Washingtonians are fully vaccinated. ^{ℓℓ}



Almost half of BC's visitors from Washington in 2019 were in the 55+ age demographic. ^{††}



BC's strongest differentiators are its many "opportunities to view wildlife", and its "beautiful natural scenery" "where you can feel the power of nature". ^{§§}



In 2021, 54% of air-bookings from Washington to BC were within 29 days of their travel date. This is comparative to 2019, where 50% of air-bookings were scheduled within the same window. [◇]

SOURCES

- † Destination Canada's Global Tourism Watch (2020)
- ‡ Destination BC Internal Estimates
- § Destination BC Global Marketing Plan 2021
- †† Destination BC's BC Residents' Perceptions: COVID-19 Travel and Tourism (September 2021)

- # Morning Consult's Weekly Global Vaccine Tracking Survey (September 2021)
- ◇ Brand USA's International Travel & Consumer Sentiment Survey (June 2021)
- ** Ipsos Global Views on Personal Health Data and Vaccine Passports Survey (April 2021)
- ††† Destination BC Tabulations from the 2019 Visitor Travel Survey (Statistics Canada)
- §§ Destination BC's Key Performance Indicators Consumer Research (2019)
- ℓℓ Statistics Canada; Prepared by Destination BC

- ◇ ForwardKeys (2019)
- △ Google InVITE Travel Search Queries (2019 vs 2018)
- ∞ Destination Canada (July 2021)
- ℓℓ John Hopkins University (November 2021)



MARKET PROFILES

Washington

NOVEMBER 2021

WASHINGTON

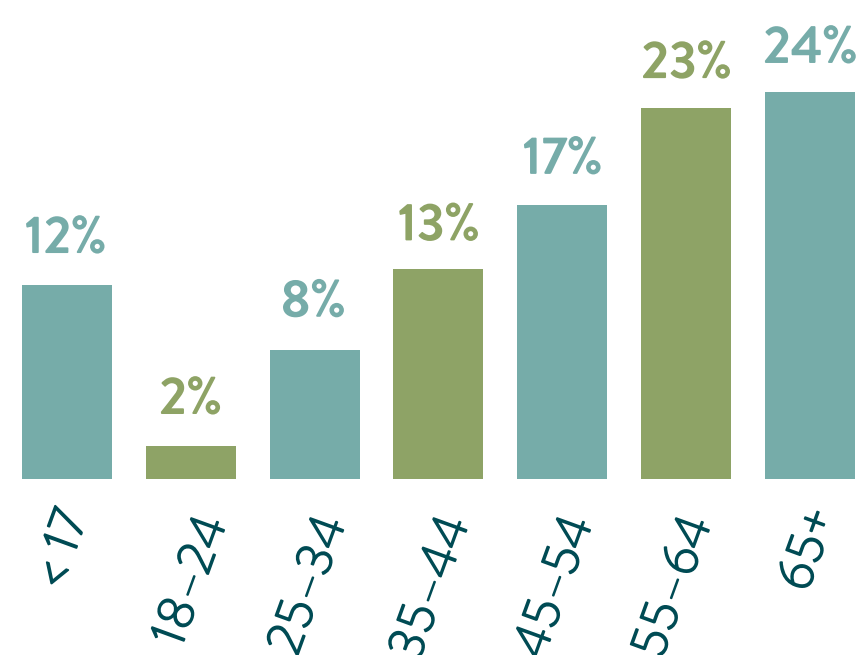
BRITISH COLUMBIA

Traveller and Trip Characteristics

Average Travel Party Size^Ω



Age^Ω



Top 3 EQ Types^Σ

- Free Spirits
- Gentle Explorers
- Cultural Explorers

Past Visitation to Canada[†]

38%

Trip Purpose^Ω

48% 32% 5% 14%

Top 5 Activities^Σ

- Sampling local cuisine
- Hiking or walking in nature
- Shopping
- Natural attractions
- Viewing wildlife or marine life

Average Spending Per Person in BC^{††}

\$402

Average Trip Length in BC^{††}

3.0 Nights



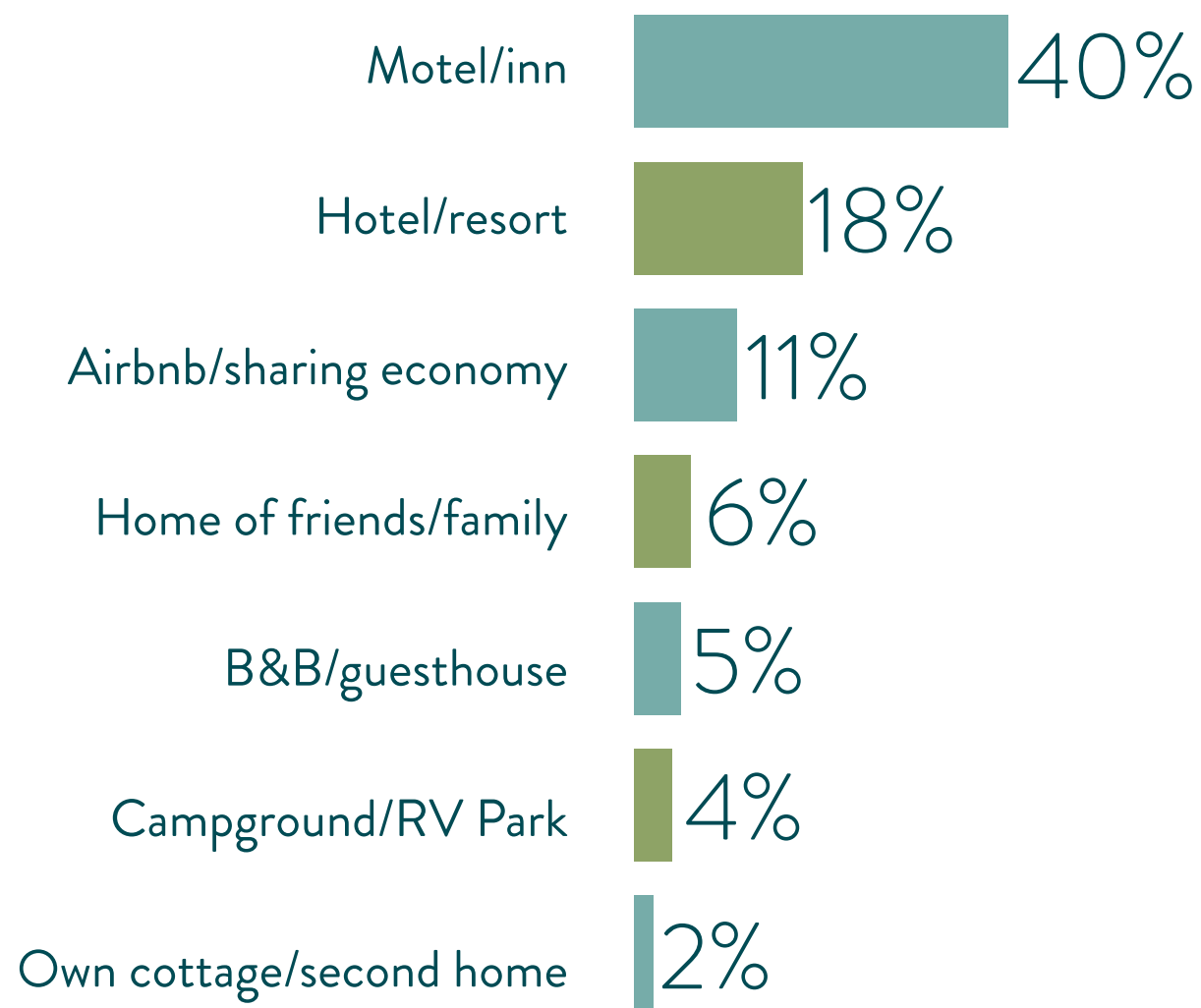
Travel Seasons^Ω

18% Spring 28% Summer 32% Fall 22% Winter

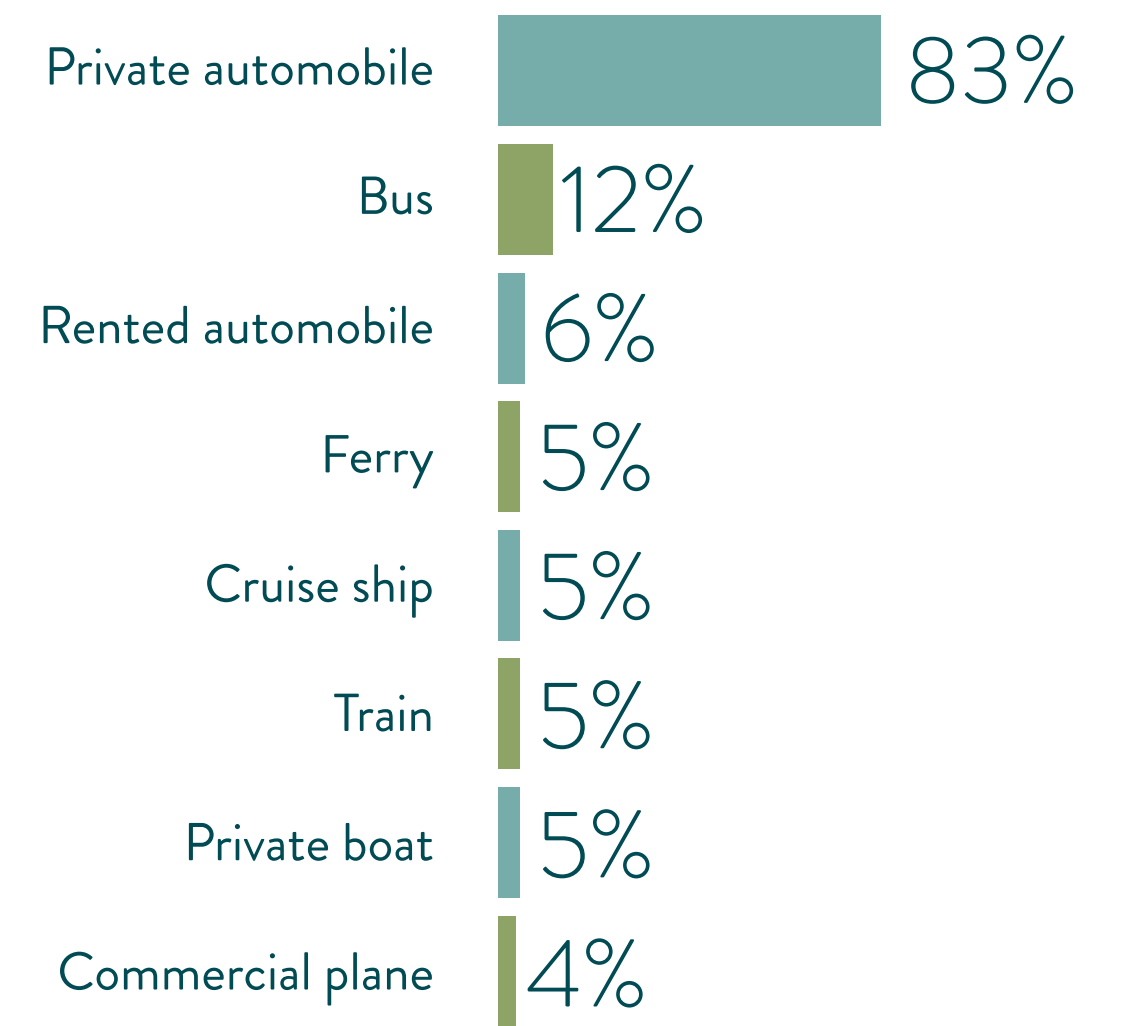
Travel Agent/Tour Operator Usage^Σ

	Researching	Booking
✈ Flights	21%	19%
🏠 Accommodations	19%	14%
🚗 Transportation	17%	13%
🎿 Activities	14%	8%
🎮 Potential Travel Destinations	27%	
27% Did not use a travel agent		

Accommodations^Σ



Transportation Used During Trip^Ω



US Travel Bookings^Π

44% Offline

56% Online

64% Mobile

63% Online Supplier

36% Desktop

37% Online Travel Agent

MARKET PROFILES California

NOVEMBER 2021

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Market Overview

2019 Market Visitation Rank ^{††}

#1

USA was the 1st international market for BC in 2019

2019 Familiarity with BC ^{§§}

59%

2021 Market Status [§]

Monitor for Investment (CA)

BC Past Performance

2019 Reported Visitation ^{††}



615,000

45.6% BC's Share of 2019 Canadian Californian Visitation

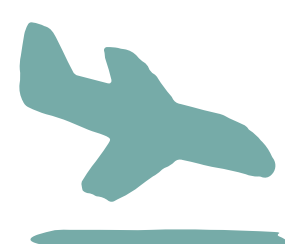
2019 Reported Expenditure ^{††}



\$548.3M

48.0% BC's Share of 2019 Canadian Californian Expenditures

2019 Air Capacity [◇]



+5.3%

2019 BC Travel Search Queries [△]



0%

Factors Impacting/Helping Recovery

British Columbian's Comfort Welcoming US Visitors ^{††}

23%

Of BC residents are comfortable welcoming visitors from the US to their community

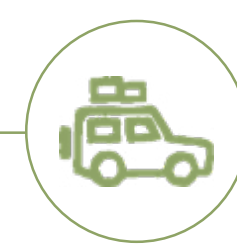


Willingness to Receive Vaccine [#]

73%

Support for Vaccine Passports for International Travel ^{**}

71%



American Perceptions of Travelling to Canada [™]

52%

believe Canada is safe to travel to

Canadian Border Opened to Fully-Vaccinated US Travellers

August 2021

Market Highlights



As of November 1st, 2021, 63% of Californians are fully vaccinated. ^{ℓℓ}



The fall months are a popular time for Californian visitors, with 40% of visitation. ^{††}



BC is an appealing destination to Californians of all ages, with a broad age distribution. ^{††}



In 2021, 57% of Californian air-bookings to BC were between 5–44 days before their scheduled travel date. Comparatively in 2019, 51% of travellers booked flights within the same window. [◇]

SOURCES

† Destination Canada's Global Tourism Watch (2020)
 ‡ Destination BC Internal Estimates
 § Destination BC Global Marketing Plan 2021
 ¶ Destination BC's BC Residents' Perceptions: COVID-19 Travel and Tourism (September 2021)

Morning Consult's Weekly Global Vaccine Tracking Survey (September 2021)
 ∂ Brand USA's International Travel & Consumer Sentiment Survey (June 2021)
 ** Ipsos Global Views on Personal Health Data and Vaccine Passports Survey (April 2021)
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 ¶¶ Statistics Canada; Prepared by Destination BC

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 △ Google InVITE Travel Search Queries (2019 vs 2018)
 ∞ Destination Canada (July 2021)
 ℓℓ John Hopkins University (November 2021)

MARKET PROFILES California

NOVEMBER 2021

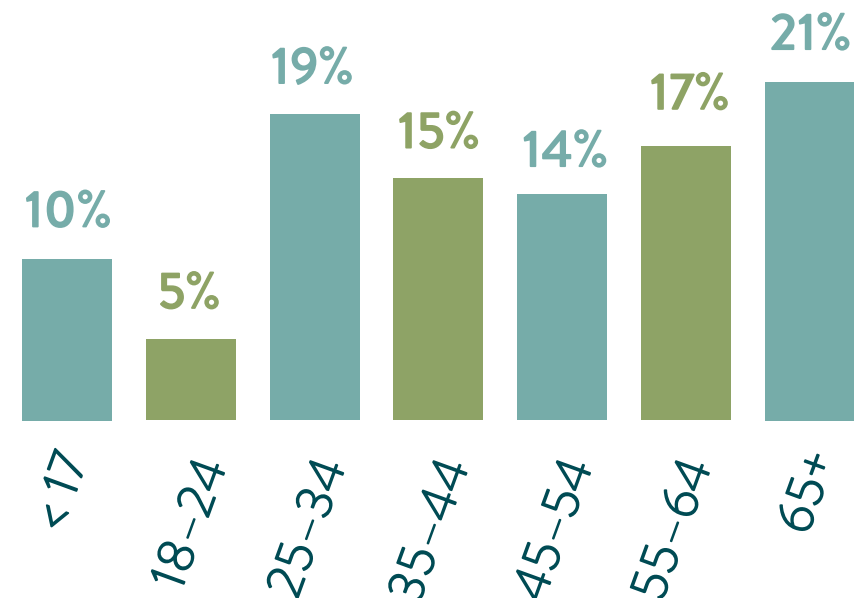


Traveller and Trip Characteristics

Average Travel Party Size^Q



Age^Q



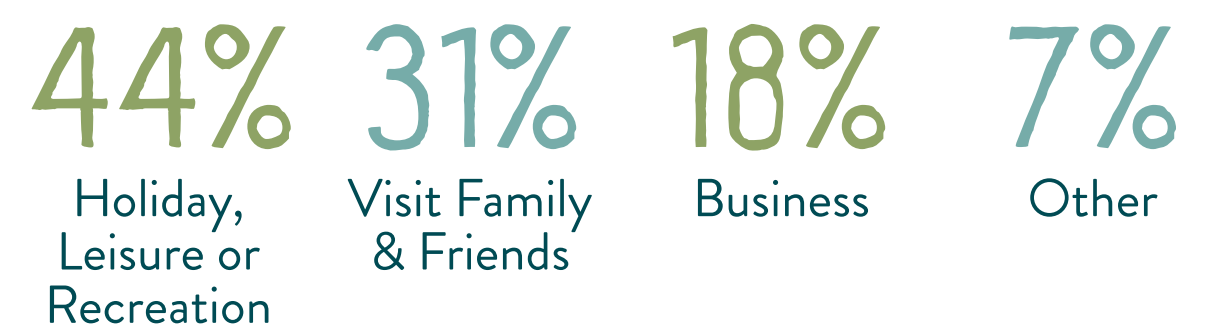
Top 3 EQ Types^Z

- Free Spirits
- Gentle Explorers
- Cultural Explorers

Past Visitation to Canada[†]

27%

Trip Purpose^Q



Top 5 Activities^Z

- Sampling local cuisine
- Hiking or walking in nature
- Natural attractions
- Shopping
- Driving tours or road trips

Average Spending Per Person in BC^{††}

\$891

Average Trip Length in BC^{††}

5.4 Nights



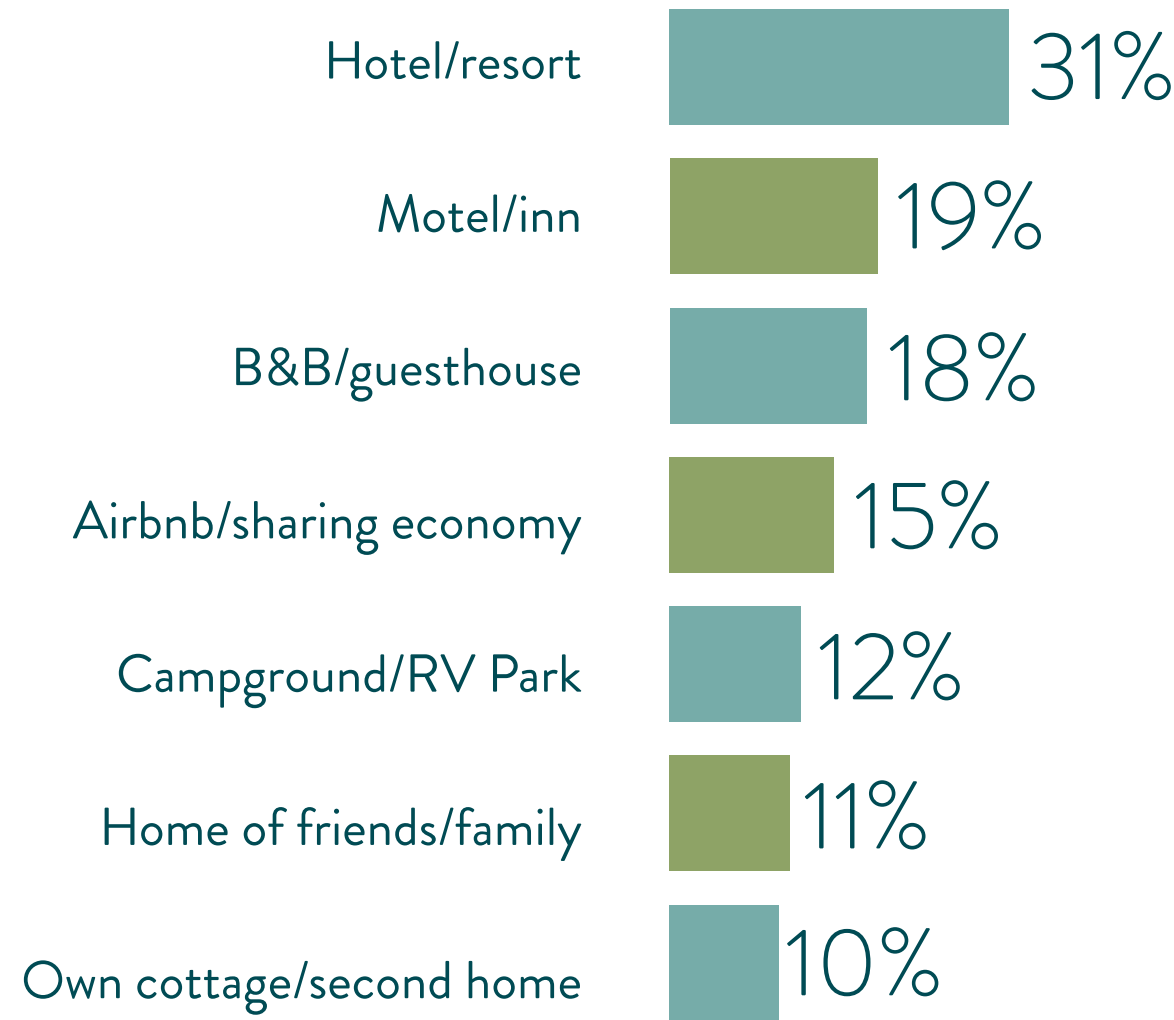
Travel Seasons^Q



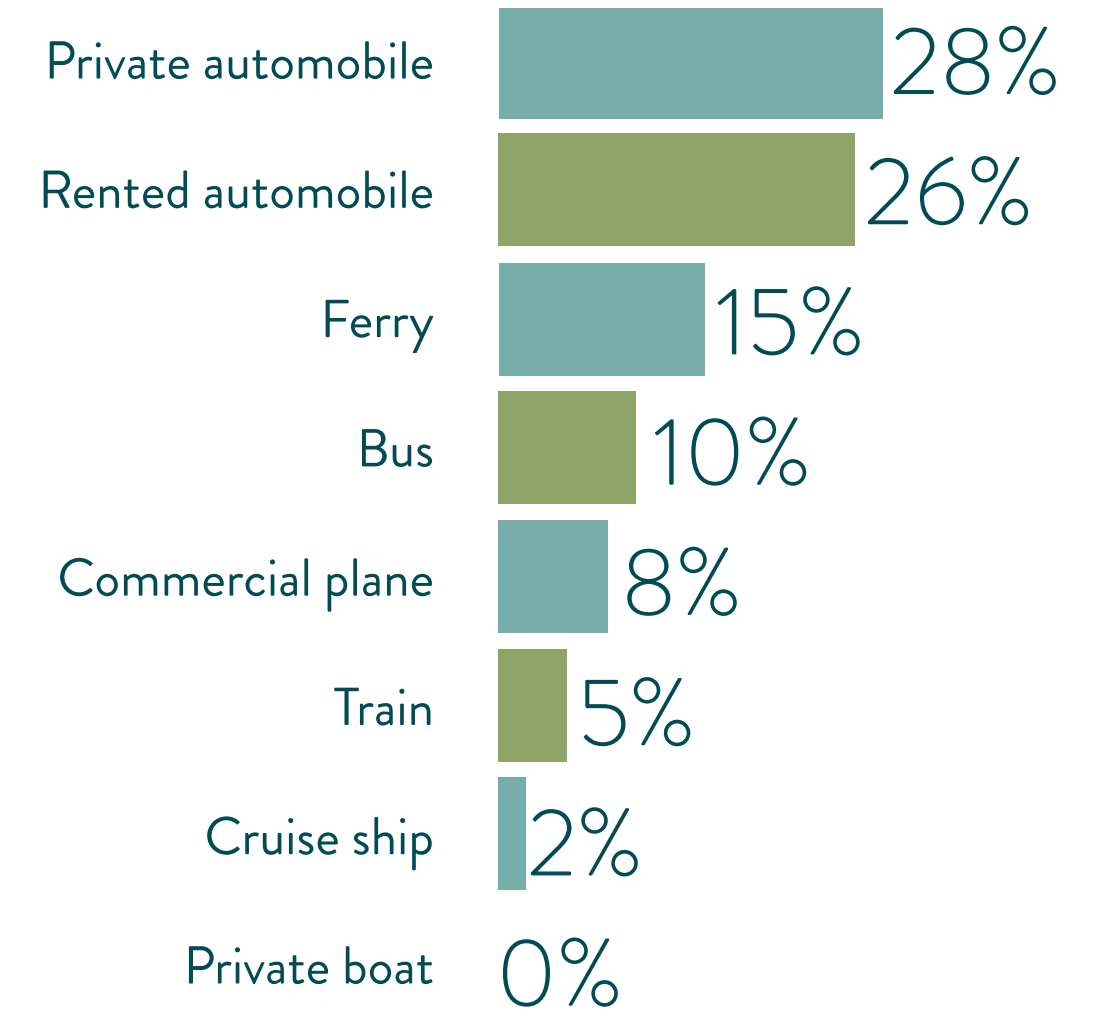
Travel Agent/Tour Operator Usage^Z

	Researching	Booking
Flights	21%	19%
Accommodations	19%	14%
Transportation	17%	13%
Activities	14%	8%
Potential Travel Destinations	27%	
27% Did not use a travel agent		

Accommodations^Z



Transportation Used During Trip^Q



US Travel Bookings^{††}

44% Offline

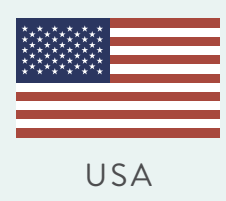
56% Online

64% Mobile

36% Desktop

63% Online Supplier

37% Online Travel Agent

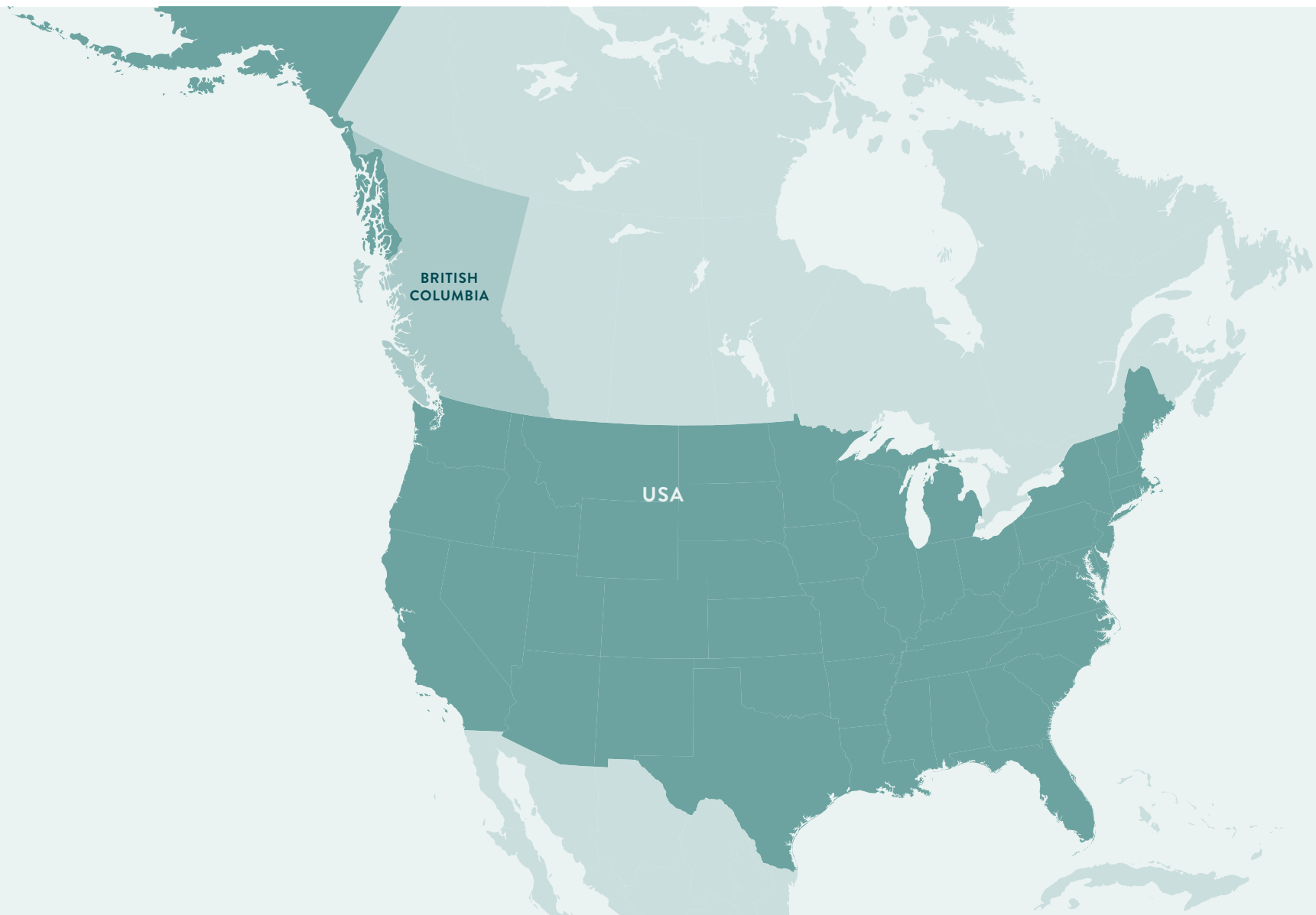


MARKET PROFILES

United States of America

NOVEMBER 2021

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Market Overview

2019 Overnight Outbound Departures from USA*

96,719,530

Change in overnight departures from 2018 +4.5%

2019 Market Visitation Rank ††

#1 USA was the largest international market for BC in 2019

2021 Market Status§

Monitor for Investment

2020 Market Potential†

51%

Likelihood to visit BC in the next 2 years

24.14 M

2020 Potential Demand†

BC Past Performance

2019 Reported Visitation††



3,779,000

25.5% BC's Share of 2019 Canadian American Visitation

2019 Reported Expenditure††



\$2,529 M

28.5% BC's Share of 2019 Canadian American Expenditures

Airline Seat Capacity◊

+1.4%

BC Travel Search Queries^

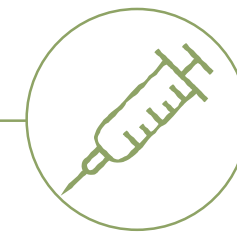
+5%

Factors Impacting/Helping Recovery

British Columbian's Comfort Welcoming US Visitors††

23%

Of BC residents are comfortable welcoming visitors from the US to their community

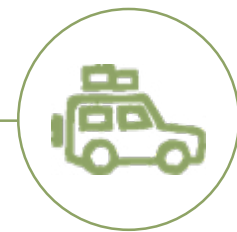


Willingness to Receive Vaccine#

73%

Support for Vaccine Passports for International Travel**

71%



American Perceptions of Travelling to Canada™

52%

believe Canada is safe to travel to

Canadian Border Opened to Fully-Vaccinated US Travellers

August 2021

Market Highlights



Almost three-quarters of Americans (74%) are excited to travel for leisure in the next year, with 64% expressing excitement in learning about new travel destinations and experiences.##



As of November 1st, 2021, 57% of Americans are fully vaccinated.◊



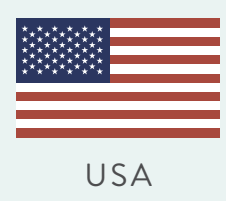
In 2021, American travellers are booking their air-travel closer to their travel date, with most bookings occurring with a lead time of 5–44 days. Compared to 2019, there is a 16% decline in bookings occurring between 45–119 days before travel.◊

SOURCES

- + Destination Canada's Global Tourism Watch (2020)
- ‡ Destination BC Internal Estimates
- § Destination BC Global Marketing Plan 2021
- †† Destination BC's BC Residents' Perceptions: COVID-19 Travel and Tourism (September 2021)
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- # Morning Consult's Weekly Global Vaccine Tracking Survey (September 2021)
- ∂ Brand USA's International Travel & Consumer Sentiment Survey (June 2021)
- ** Ipsos Global Views on Personal Health Data and Vaccine Passports Survey, April 2021
- ††† Destination BC Tabulations from the 2019 Visitor Travel Survey (Statistics Canada)
- §§ Destination BC's Key Performance Indicators Consumer Research (2019)
- Δ Google InVITE Travel Search Queries (2020 vs 2019)

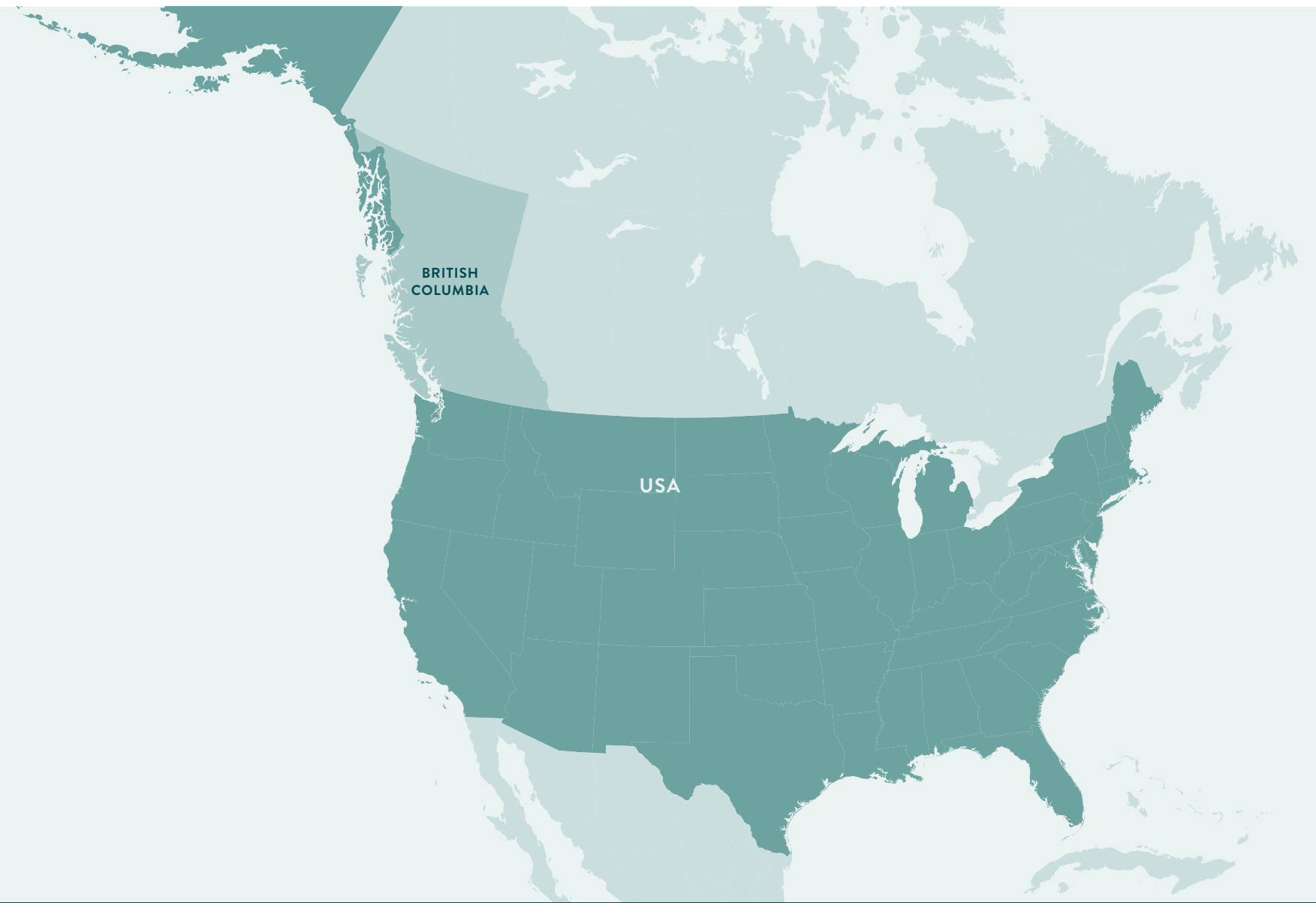
- ∞ Destination Canada (July 2021)
- ◊◊ Our World in Data (November 2021)
- ## Destination Analysts (November 2021)
- ◊ ForwardKeys



MARKET PROFILES

United States of America

NOVEMBER 2021

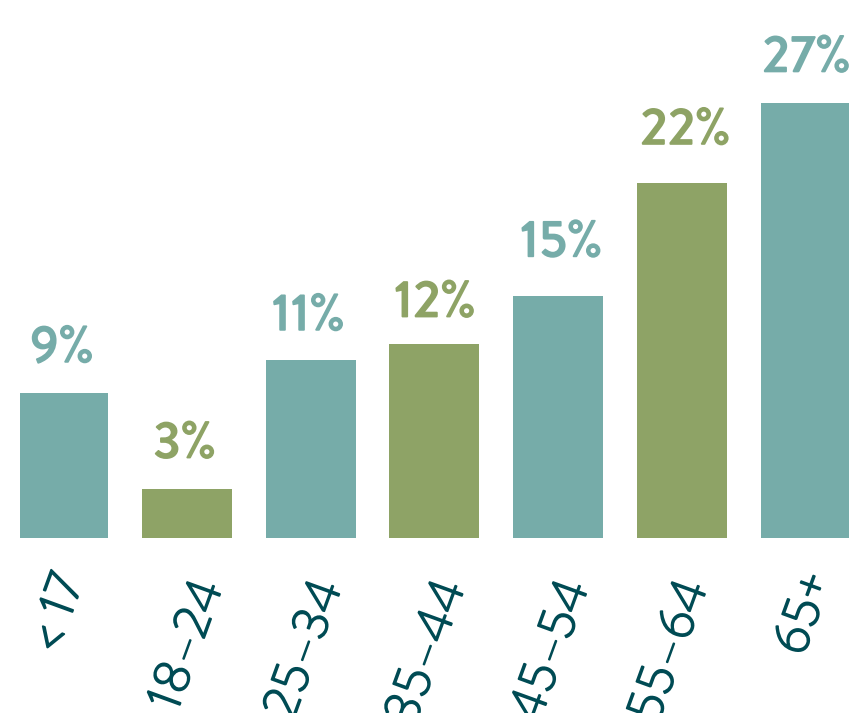


Traveller and Trip Characteristics

Average Travel Party Size^Q



Age^Q



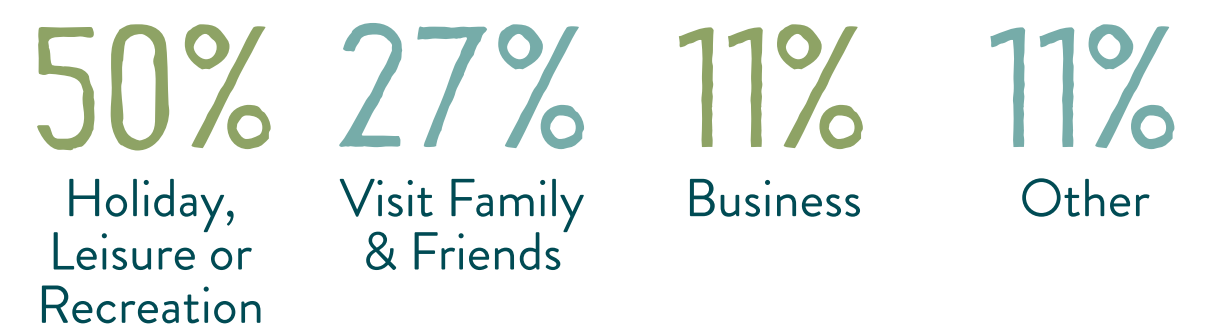
Top 3 EQ Types^Z

- Free Spirits
- Gentle Explorers
- Authentic Experiencers

Past Visitation to Canada[†]

54%

Trip Purpose^Q



Top 5 Activities^Z

- Sampling local cuisine
- Hiking or walking in nature
- Natural attractions
- City/town sightseeing
- Shopping

Average Spending Per Person in BC^{††}

\$669

Average Trip Length in BC^{††}

4.5 Nights



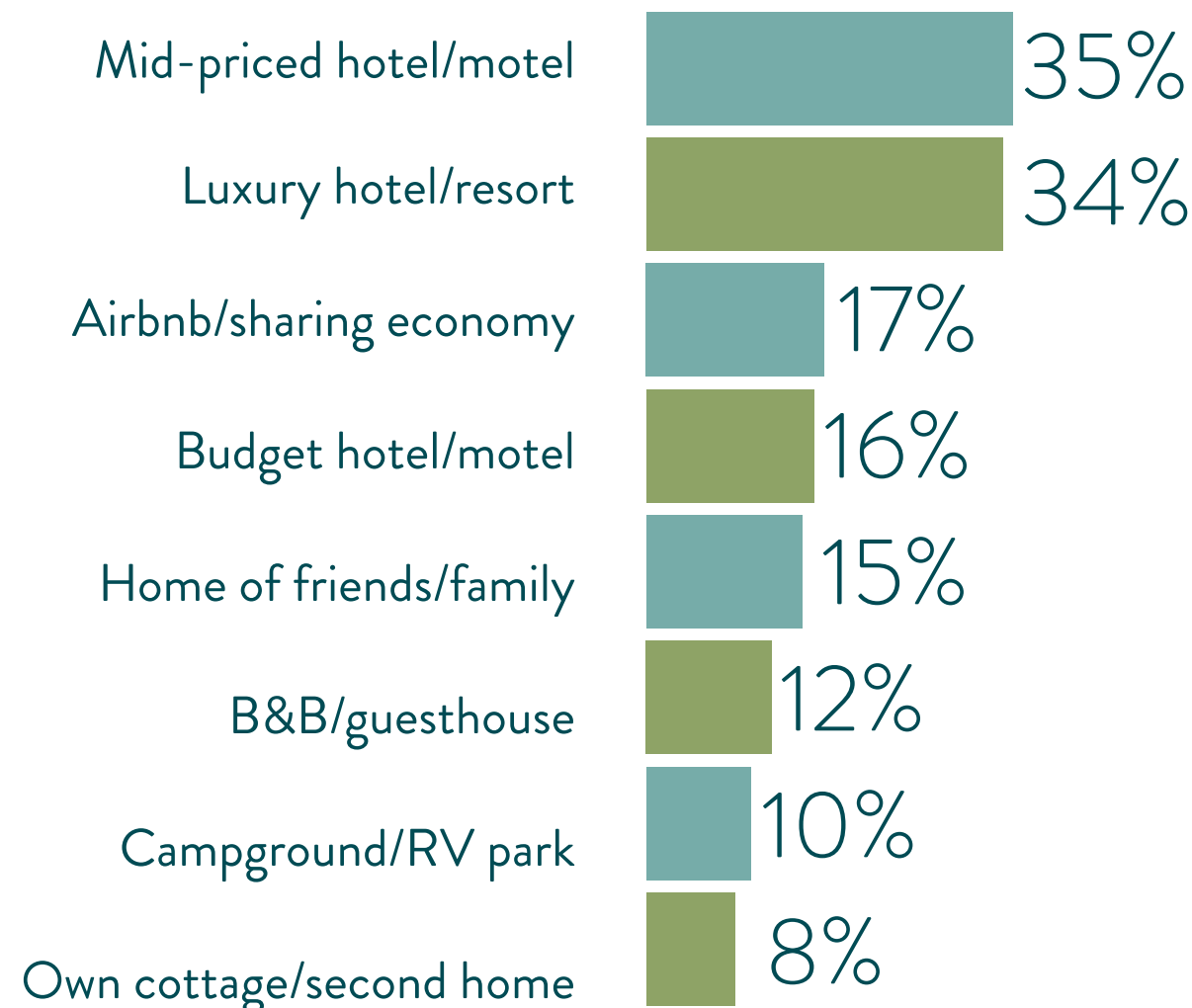
Travel Seasons^Q



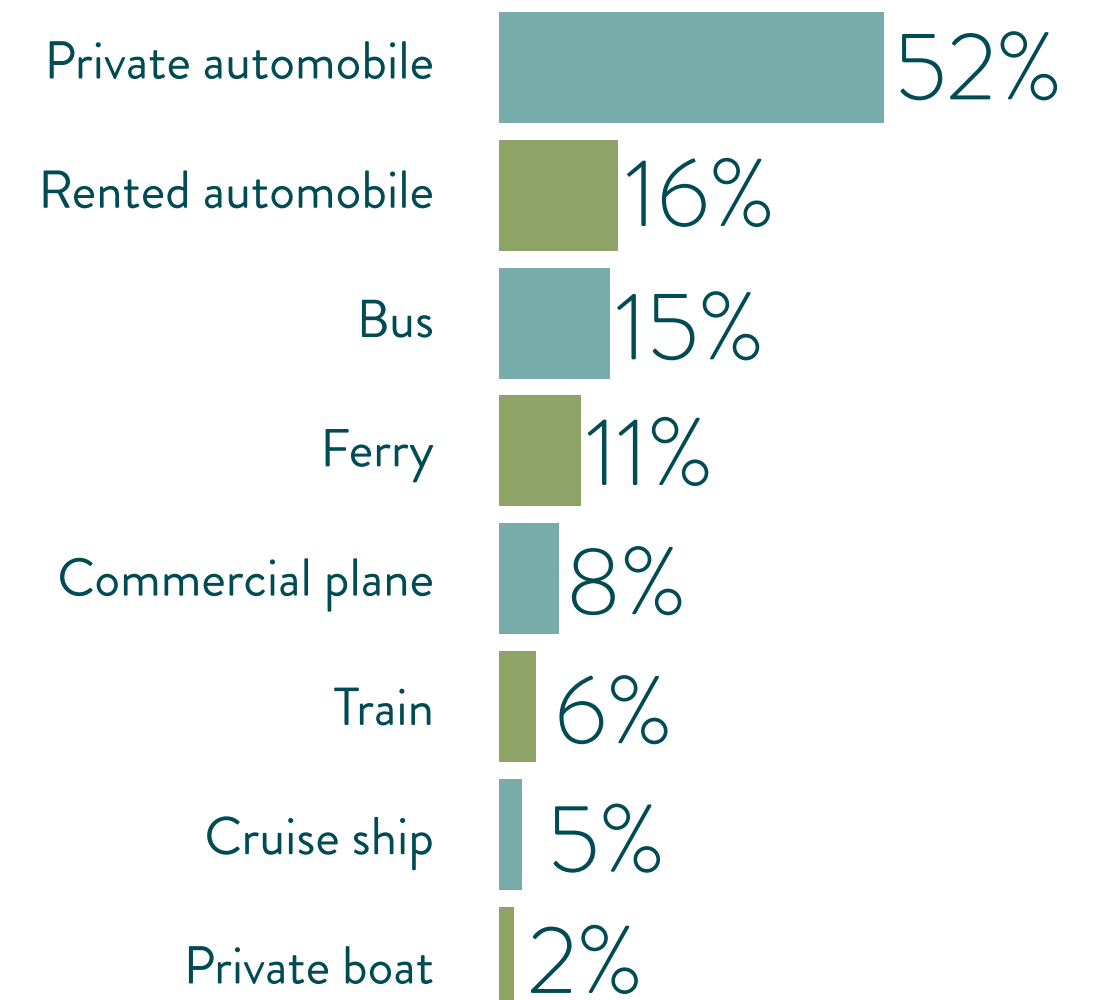
Travel Agent/Tour Operator Usage^Z

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✈ Flights	21%	14%
🏠 Accommodations	19%	13%
🚗 Transportation	17%	13%
🏃 Activities	14%	8%
🎯 Potential Travel Destinations	27%	
27% Did not use a travel agent		

Accommodations^Z



Transportation Used During Trip^Q



US Travel Bookings^{††}

44% Offline

56% Online

64% Mobile

63% Online Supplier

36% Desktop

37% Online Travel Agent