



MARKET PROFILES

Washington

NOVEMBER 2023

The 2023 US Market Profiles contain the latest information and highlights on Destination BC’s key US markets. This publication summarizes each target market, including the size of the market, volume and expenditures in BC, and traveller and trip characteristics. The latest market highlights and indicators of future travel are also included. Highlights and factors are ever-changing—as such, those available here are time-stamped from the date of publication.



Market Overview

Future Travel Indicators

2022 Market Visitation Rank^{††}

#1

US Market for BC in 2022

2023 Market Status[§]

Invest

2022 Market Potential[≈]

20%

Likelihood to Visit BC in the Next 2 Years

Familiarity with BC as a Travel Destination[≈]

65%

Air Capacity to BC in 2023[◇]



-8.6%

Change Over 2022

BC Performance

2023 Estimated Visitation^{††}



1,053,000


34%

Washington’s Share of US Visitation in BC

1,139,000

2024 Forecasted Visitation

2023 Estimated Expenditure^{††}



\$458.1M

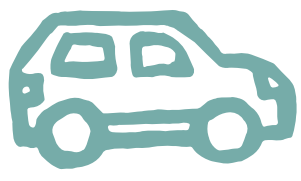
21%

Washington’s Share of US Expenditures in BC

\$510.6M

2024 Forecasted Expenditure


2022 Automobile Border Crossings into BC^Δ



+243%

Change Over 2021


2022 BC Travel Search Queries^Δ




+130%

Change Over 2021


Market Highlights




US visitation recovery is not forecasted to reach 2019 levels until 2026 and Washington resident visitation in 2023 is forecasted to be -25% below 2019 levels.^ε




Only one-quarter of travellers from Washington have visited British Columbia in the past five years. However, future intent to travel within the next two years has increased from 2022.^ℓ




Washington’s air capacity for the first half of 2024 shows an uplift of 9% over the same period in 2023, underscoring a solid increment in travel demand year-over-year.[◇]



US travellers prioritize safety (38%) and outdoor experiences (35%) when considering Canada, with a strong inclination for relaxation (34%) and cultural engagement (32%). Cost (26%) and poor weather (21%) stand out as the main barriers, with additional concerns about gas prices and travel distances within Canada also impacting their travel planning.^μ



A significant 76% of US travellers consider Canada an environmentally friendly destination, and 73% see it as socially responsible. However, only 16% cite the availability of eco-friendly and socially responsible travel options as influencing their choice to travel to Canada.^ν



72% of Americans expect to take at least one leisure trip in the next three months, with two-thirds saying they will include a trip to visit friends or relatives.[✓]



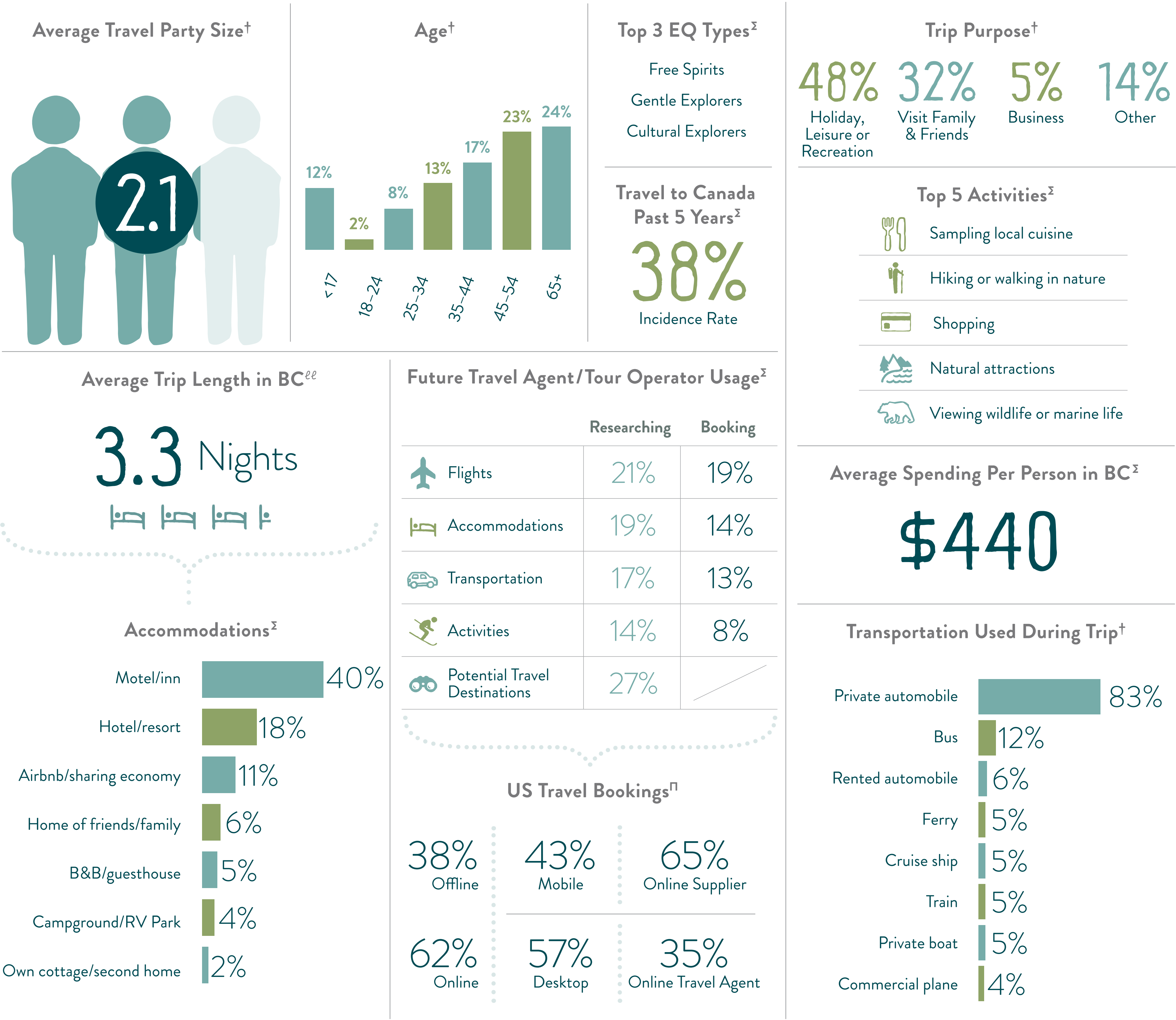
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Washington

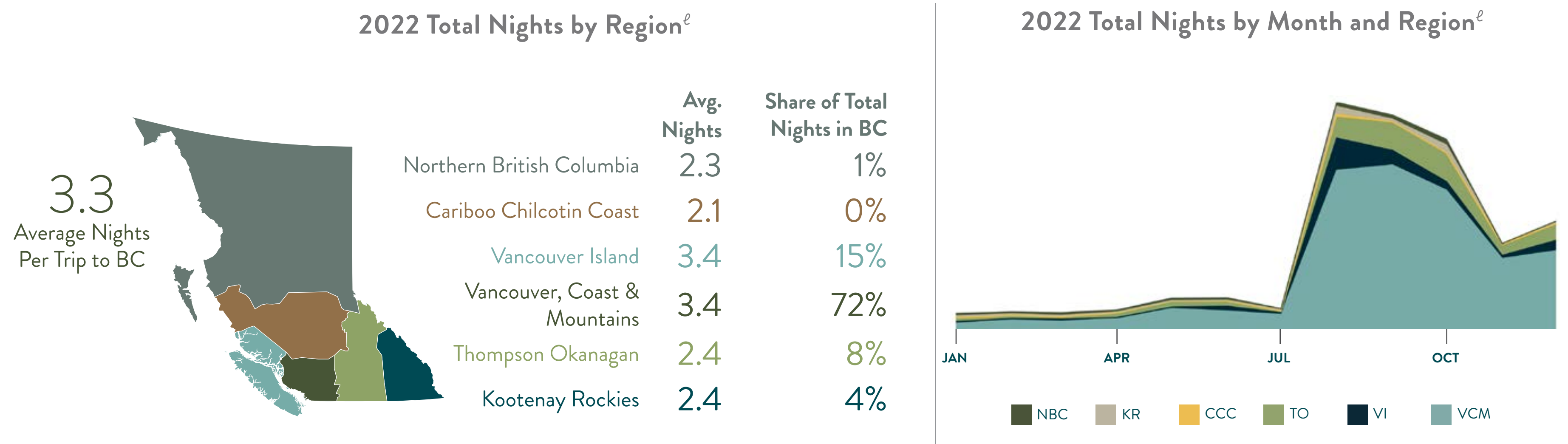
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Traveller and trip characteristics are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs. Seasonal and geographical dispersion is reflective of 2022.

Traveller and Trip Characteristics



Dispersion



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California

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Market Overview

2022 Market Visitation Rank ^{††}

#2

US Market for BC in 2022

2023 Market Status [§]

Invest

2022 Market Potential [≈]

17%

Likelihood to Visit BC in the Next 2 Years

Familiarity with BC as a Travel Destination [≈]

65%

BC Performance

2023 Estimated Visitation ^{††}




524,000

18% California’s Share of US Visitation in BC

567,000 2024 Forecasted Visitation

2023 Estimated Expenditure ^{††}



\$504.9M

24% California’s Share of US Expenditures in BC

\$562.7M 2024 Forecasted Expenditure

2022 BC Travel Search Queries ^Δ



+75%

Change Over 2021

Future Travel Indicators

Air Capacity to BC in 2023 [◇]



+23.9%

Change Over 2022

Market Highlights



US visitation recovery is not forecasted to reach 2019 levels until 2026 and California State visitation in 2023 is forecasted to be -33% below 2019 levels. [Ⓔ]



Only one-fifth of California travellers have visited British Columbia in the past five years, with the future intent to travel within the next two years decreasing significantly from 2022. [Ⓔ]



California’s air capacity for January to June 2024 is projected to surge by 22% compared to the same period in 2023, indicating a powerful rebound and increased travel connectivity. [◇]



US travellers prioritize safety (38%) and outdoor experiences (35%) when considering Canada, with a strong inclination for relaxation (34%) and cultural engagement (32%). Cost (26%) and poor weather (21%) stand out as the main barriers, with additional concerns about gas prices and travel distances within Canada also impacting their travel planning. [Ⓜ]



A significant 76% of US travellers consider Canada an environmentally-friendly destination, and 73% see it as socially responsible. Still, only 16% cite the availability of eco-friendly and socially responsible travel options as influencing their choice to travel to Canada. [Ⓜ]



72% of Americans expect to take at least one leisure trip in the next three months, with two-thirds saying they will include a trip to visit friends or relatives. [✓]

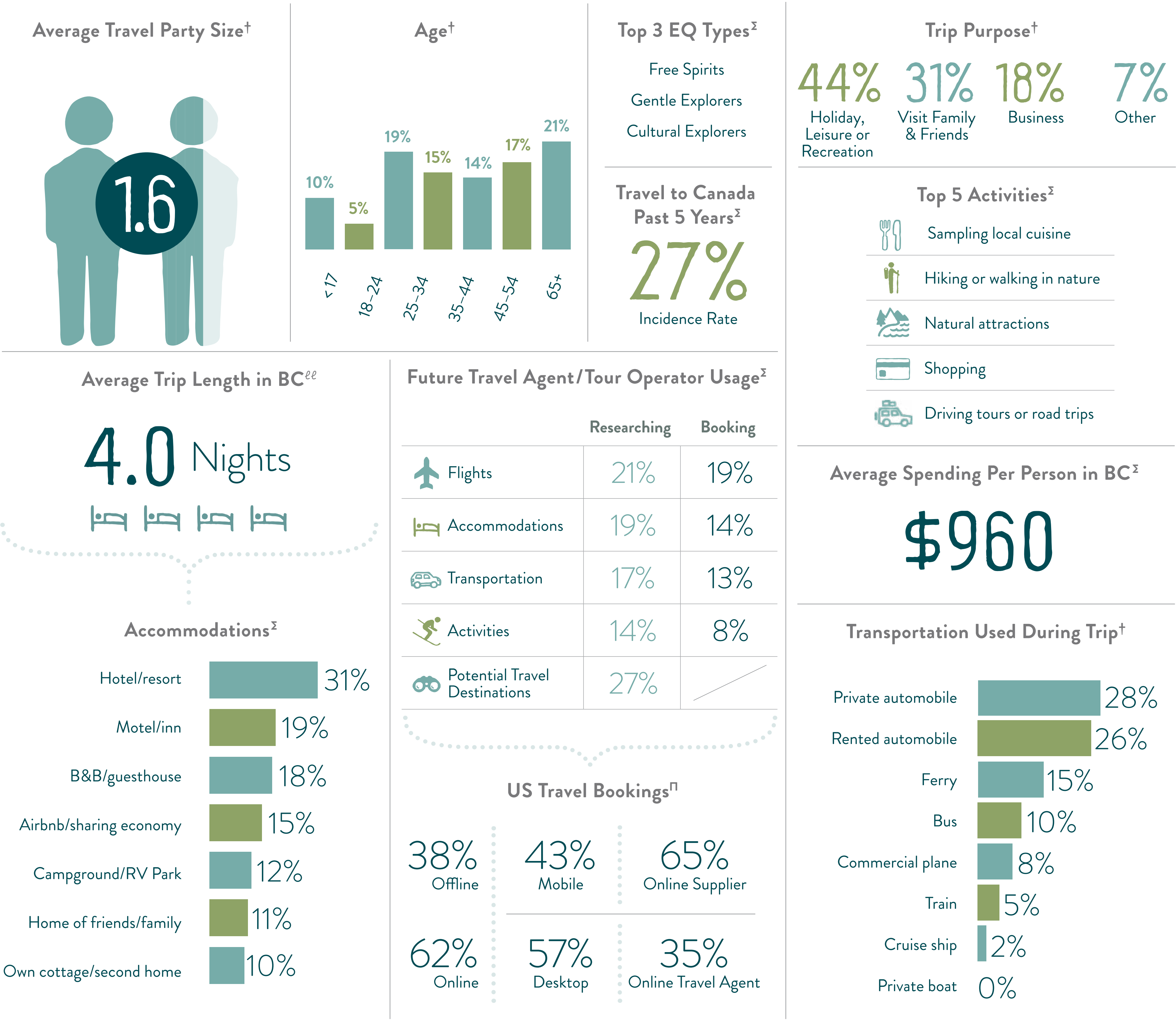
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California

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Traveller and Trip Characteristics



Dispersion

