



MARKET PROFILES

Washington

DECEMBER 2024

The 2024 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

2023 Market Visitation Rank <sup>††</sup>

#3

US Market for BC in 2023

2022 Market Potential<sup>≈</sup>

20%

Likelihood to Visit BC in the Next 2 Years

2023 Market Status<sup>§</sup>

Grow Brand Affinity/Seasonal Dispersion

2023 Seasonal Dispersion Change<sup>^</sup>

+1.3<sub>PT</sub>

2023 Off Peak Nights **77.5%**

Seasonal Dispersion is the % of nights spent in BC for all months outside of peak months of July and August.

2023 Geographical Dispersion Change<sup>^</sup>

-0.4<sub>PT</sub>

2023 Emerging Destination Nights **21.8%**

Geographic Dispersion is the % of nights spent in BC for all destinations considered to be emerging.

BC Performance

2023 Estimated Visitation<sup>††</sup>

1,000,000

34% Washington’s Share of US Visitation in BC

1,139,000 2024 Forecasted Visitation

2023 Estimated Expenditure<sup>††</sup>

\$453M

21% Washington’s Share of US Expenditures in BC

\$510.6M 2024 Forecasted Expenditure

2023 Automobile Border Crossings into BC<sup>ð</sup>

+0.47%

Change Over 2022

2023 BC Travel Search Queries<sup>^</sup>

+11%

Change Over 2022

Future Travel Indicators

Air Capacity to BC in 2023<sup>ð</sup>

-8.8%

Change Over 2022

Flight Bookings in 2023<sup>ð</sup>

+23.8%

Change Over 2022

Market Highlights

It was forecast that 2023 US traveller’s spend would return to 2019 levels and visitation numbers would fully recover by 2024.<sup>é</sup>

53% are likely to visit British Columbia in the next two years.<sup>é</sup>

Washington’s air capacity for the first half of 2024 showed an uplift of 9% over the same period in 2023, underscoring a solid increment in travel demand year-over-year.<sup>ð</sup>

American travellers are increasingly turning their attention abroad for their upcoming trips. Four out of ten American travellers (40%) said they were considering international leisure travel in the next 12 months, 12.5% mentioned Canada as a place they want to visit in the 12 months. The most popular types of leisure travel expected in 2024 include visiting family and friends (46%), beach vacations (36%), and road trips (34%).<sup>^</sup>

69% of Americans say that sustainability influences their travel decisions. Younger generations drive this trend.<sup>^</sup>

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.<sup>✓</sup>





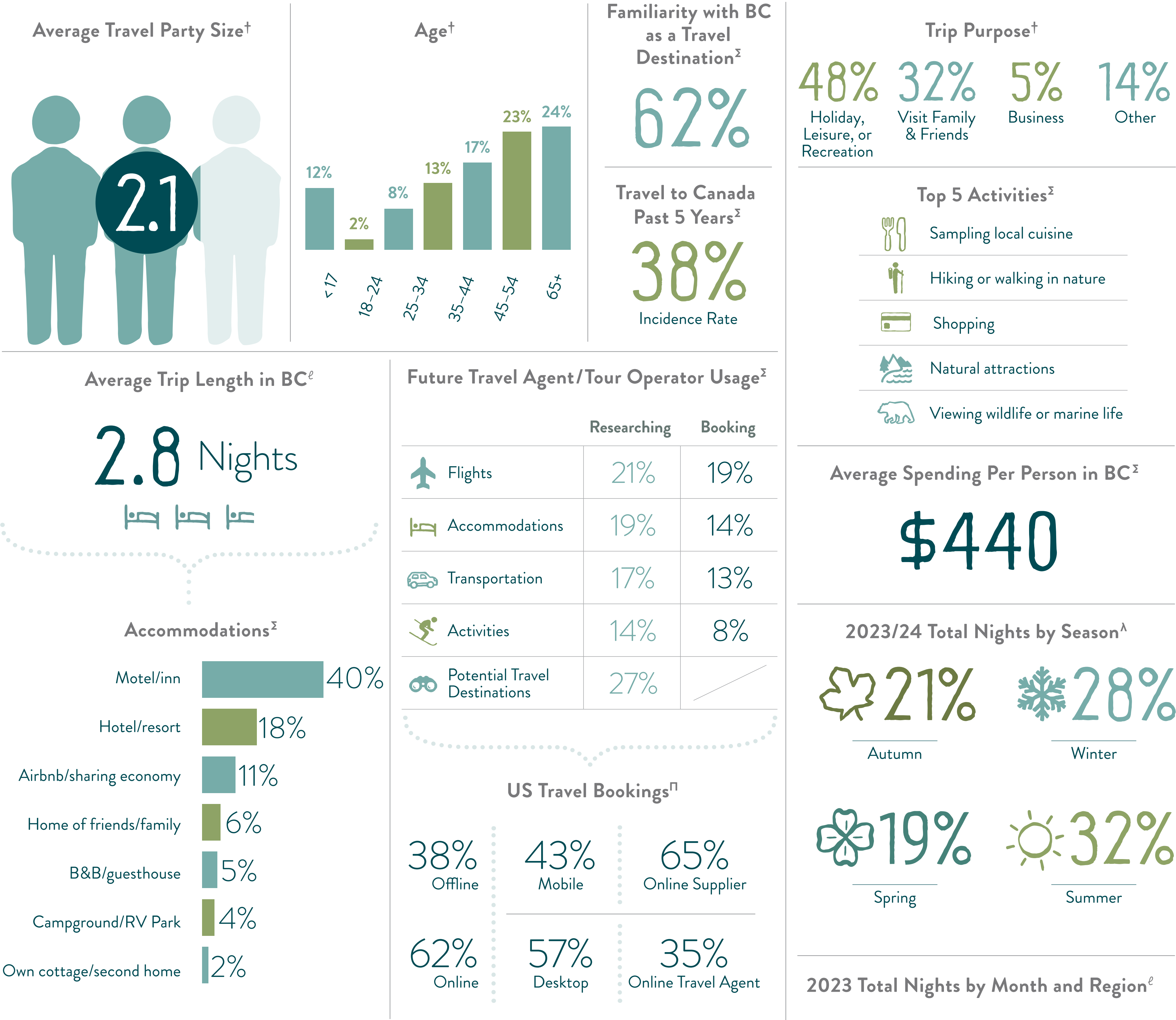
MARKET PROFILES

Washington

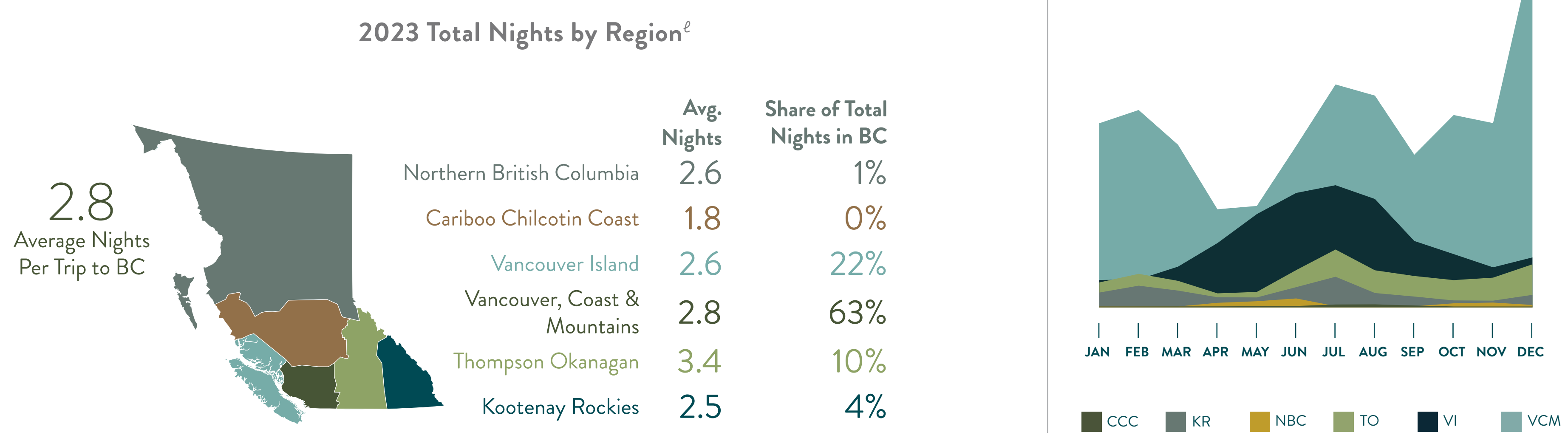
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Traveller and trip characteristics are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs. Seasonal and geographical dispersion is reflective of 2023.

Traveller and Trip Characteristics



Dispersion





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# California

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Market Overview

2023 Market Visitation Rank <sup>††</sup>

#6

US Market for BC in 2023

2023 Market Potential<sup>≈</sup>

17%

Likelihood to Visit BC in the Next 2 Years

2023 Market Status<sup>§</sup>

Grow Brand Affinity/Seasonal Dispersion

2023 Seasonal Dispersion Change<sup>^</sup>

+0.5 PT

2023 Off Peak Nights **70.0%**

Seasonal Dispersion is the % of nights spent in BC for all months outside of peak months of July and August.

2023 Geographical Dispersion Change<sup>^</sup>

-0.3 PT

2023 Emerging Destination Nights **15.8%**

Geographic Dispersion is the % of nights spent in BC for all destinations considered to be emerging.

BC Performance

2023 Estimated Visitation<sup>††</sup>




600,000

18% California’s Share of US Visitation in BC

567,000 2024 Forecasted Visitation

2023 Estimated Expenditure<sup>††</sup>



\$532M

24% California’s Share of US Expenditures in BC

\$562.7M 2024 Forecasted Expenditure

2023 BC Travel Search Queries<sup>Δ</sup>

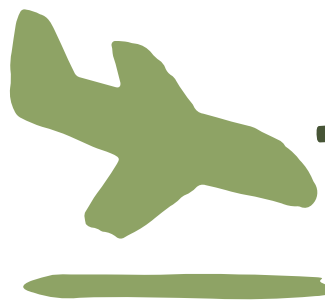


+13%

Change Over 2022

Future Travel Indicators

Air Capacity to BC in 2023<sup>◇</sup>



+23.4%

Change Over 2022

Flight Bookings in 2023<sup>◇</sup>

+30.2%

Change Over 2022

Market Highlights



It was forecast that 2023 US traveller’s spend would return to 2019 levels and visitation numbers would fully recover by 2024.<sup>ε</sup>



53% are likely to visit British Columbia in the next two years.<sup>ε</sup>



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



American travellers are increasingly turning their attention abroad for their upcoming trips. Four out of ten American travellers (40%) and nearly half of California travellers (46%) said they were considering international leisure travel in the next 12 months, 12.5% of Americans mentioned Canada as a place they want to visit in the 12 months. The most popular types of leisure travel expected in 2024 include visiting family and friends (46%), beach vacations (36%), and road trips (34%).<sup>μ</sup>



69% of Americans say that sustainability influences their travel decisions. Younger generations drive this trend.<sup>^</sup>



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.<sup>✓</sup>

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# California

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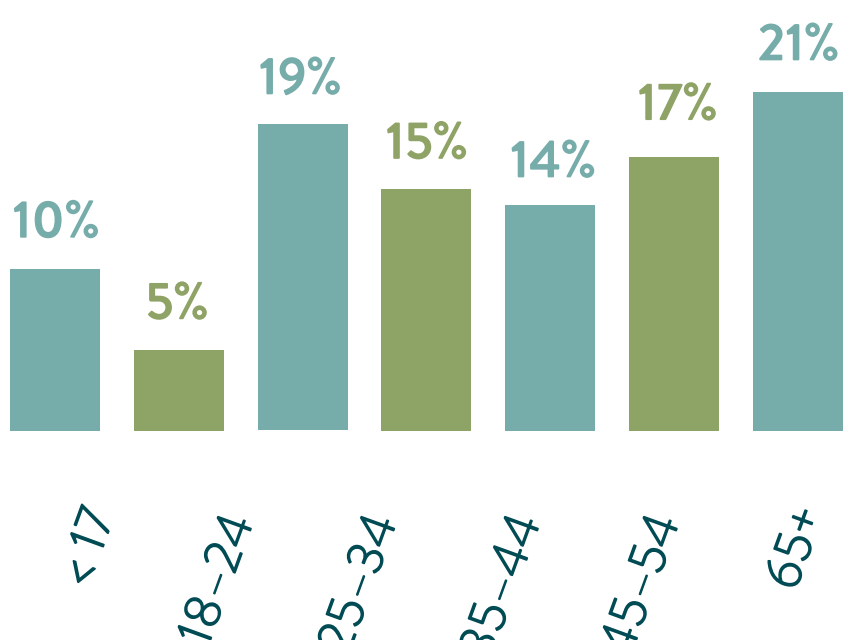
## Traveller and Trip Characteristics

### Average Travel Party Size<sup>†</sup>



1.6

### Age<sup>†</sup>



Age Group	Percentage
<17	10%
18-24	5%
25-34	19%
35-44	15%
45-54	14%
65+	21%

### Familiarity with BC as a Travel Destination<sup>Σ</sup>

65%

### Travel to Canada Past 5 Years<sup>Σ</sup>

27%

Incidence Rate

### Trip Purpose<sup>†</sup>

44%

Holiday, Leisure, or Recreation

31%

Visit Family & Friends


18%


Business


7%


Other


### Top 5 Activities<sup>Σ</sup>

 Sampling local cuisine

 Hiking or walking in nature


 Natural attractions

 Shopping

 Driving tours or road trips

### Average Trip Length in BC<sup>ℓ</sup>






4.3 Nights



### Accommodations<sup>Σ</sup>

Hotel/resort	31%
Motel/inn	19%
B&B/guesthouse	18%
Airbnb/sharing economy	15%
Campground/RV Park	12%
Home of friends/family	11%
Own cottage/second home	10%


### Future Travel Agent/Tour Operator Usage<sup>Σ</sup>

	Researching	Booking
 Flights	21%	19%
 Accommodations	19%	14%
 Transportation	17%	13%
 Activities	14%	8%
 Potential Travel Destinations	27%	


### Average Spending Per Person in BC<sup>Σ</sup>

\$960


### 2023/24 Total Nights by Season<sup>Λ</sup>

 20%


Autumn

 19%

Winter

 19%

Spring

 42%

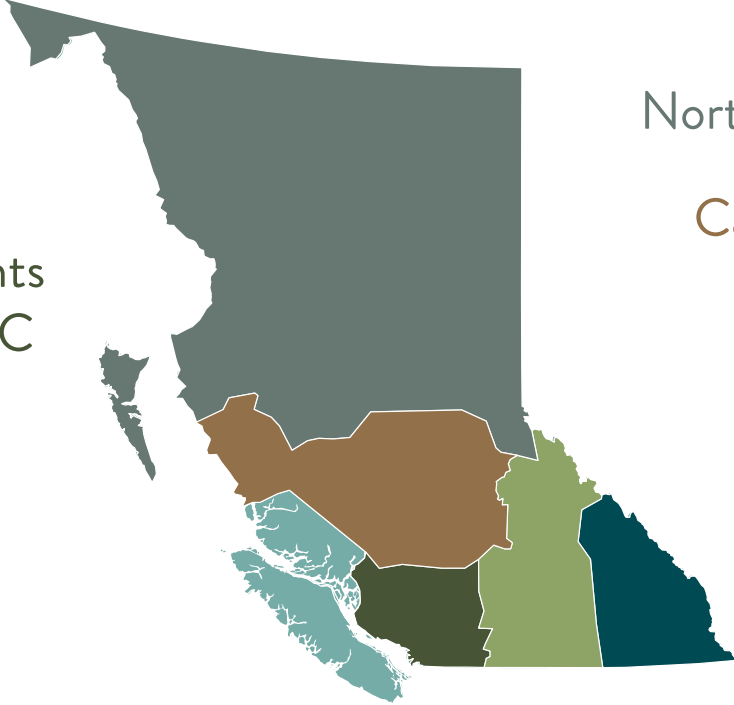
Summer

### US Travel Bookings<sup>Π</sup>

38% Offline	43% Mobile	65% Online Supplier
62% Online	57% Desktop	35% Online Travel Agent

## Dispersion

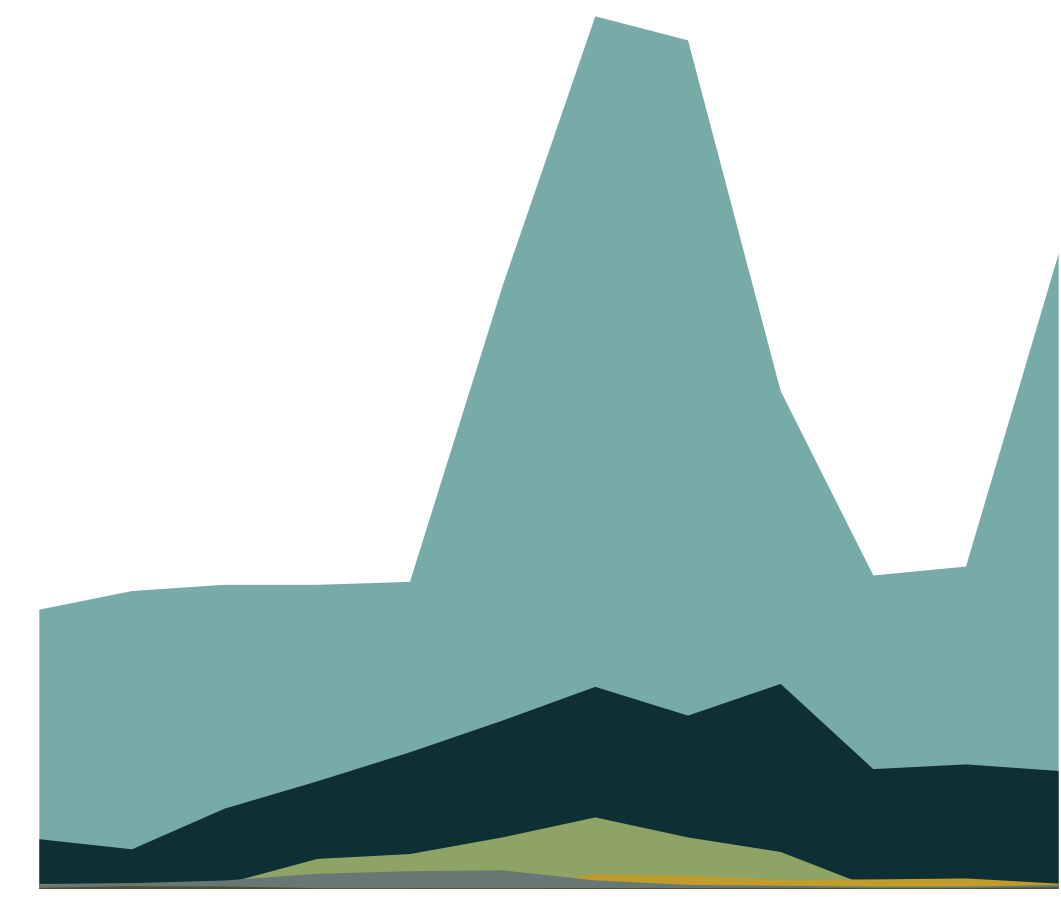
### 2023 Total Nights by Region<sup>ℓ</sup>




4.3 Average Nights Per Trip to BC

Region	Avg. Nights	Share of Total Nights in BC
Northern British Columbia	1.9	1%
Cariboo Chilcotin Coast	2.6	0%
Vancouver Island	4.1	19%
Vancouver, Coast & Mountains	4.4	75%
Thompson Okanagan	4.2	4%
Kootenay Rockies	4.1	1%

### 2023 Total Nights by Month and Region<sup>ℓ</sup>



Legend: CCC, KR, NBC, TO, VI, VCM

 DESTINATION BRITISH COLUMBIA®

**SOURCES**  
† Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2019)  
Σ Destination Canada's Global Tourism Watch (Pooled 2018–2019)  
≈ Destination BC Key Performance Indicators Consumer Research (2023)  
ℓ Environics Analytics (2023)  
Π Phocuswright (2023)  
Λ Destination BC's Tabulations: Visitor Nights by Season (Sept 2023–Aug 2024)