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MARKET PROFILES Washington

FEBUARY 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

2022 Market Visitation Rank ⁺⁺

2022 Market Potential^{*}

20%

Likelihood to Visit BC in

the Next 2 Years







Future Travel Indicators



BC Residents' Comfort Welcoming US Visitors to Their Community ¶



Familiarity with BC as a Travel Destination^{**}

65%

BC Performance

2022 Estimated Visitation⁺⁺



672,000 34% Washington's Share of US Visitation in BC

1,007,000 2023 Forecasted Visitation

2022 Estimated Expenditure⁺⁺



Americans' Perception of Safety in Travelling to Canada^{**}





Air Capacity to BC in 2023⁴

Market Highlights



Following recent air travel issues, Americans are expressing an increased desire to take road trips.^{\checkmark}



\$Z01.U 21%

Washington's Share of US Expenditures in BC

\$438.4M 2023 Forecasted Expenditure







+130%Change Over 2021

2022 BC Travel Search Queries[△]

SOURCES



- § Destination BC's Global Marketing Plan (2023)
- ++ Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2022)
- ≈ Destination BC's Key Performance Indicators Consumer Research (2022)
- Destination BC's Public Perceptions Tracker (December 2022) T
- ♦ ForwardKeys (January 2023)
- Δ Google InVITE Travel Search Queries (January 2023)



Within BC, Vancouver, Coast & Mountains was the most popular destination for travellers from Washington, followed by Thompson Okanagan, and Vancouver Island.^e



A less expensive Canadian dollar, as well as instability outside of North America, may drive increased US travel to Canada in 2023.^e

- Ω Touism Economics (2022)
- Destination Canada's US Sentiment for Travel to Canada ** (November 2022)
- Statistics Canada, Integrated Primary Inspection Line (2022)
- e Destination Canada, Tourism Outlook (Fall 2022)
- ℓ Environics Analytics (2022)
- ✓ The State of the American Traveler in January, Destination Analysts (January 2023)



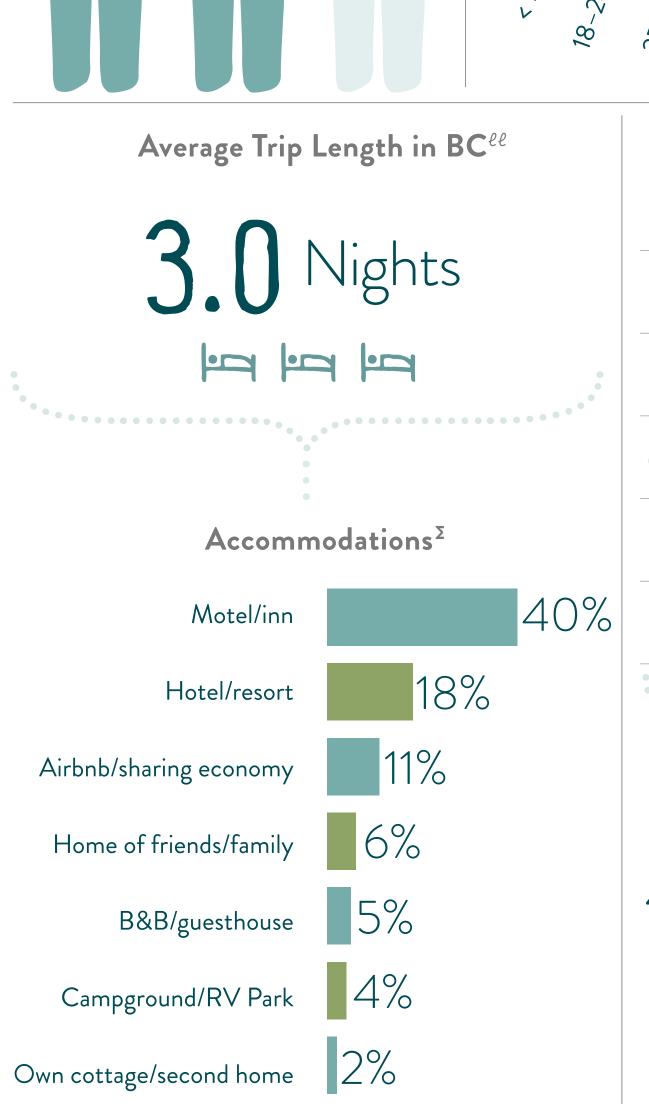
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MARKET PROFILES Washington **FEBRUARY 2023**

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





35 25	С †	Incide	nce Rate
Future Travel Agent/Tour Operator Usage ⁵			
		Researching	Booking
Flights		21%	19%
Accommodations		19%	14%
Transportation		17%	13%
X Activities		14%	8%
Potential Travel Destinations		27%	
	••••••	••••••••	•
US Travel Bookings ⁿ			
44% Offline	64% Mobile		3% e Supplier
56% Online	36% Desktop		7% Travel Agent

_	_	
Shopping		

Natural attractions

Viewing wildlife or marine life Sard

Average Spending Per Person in BC⁵

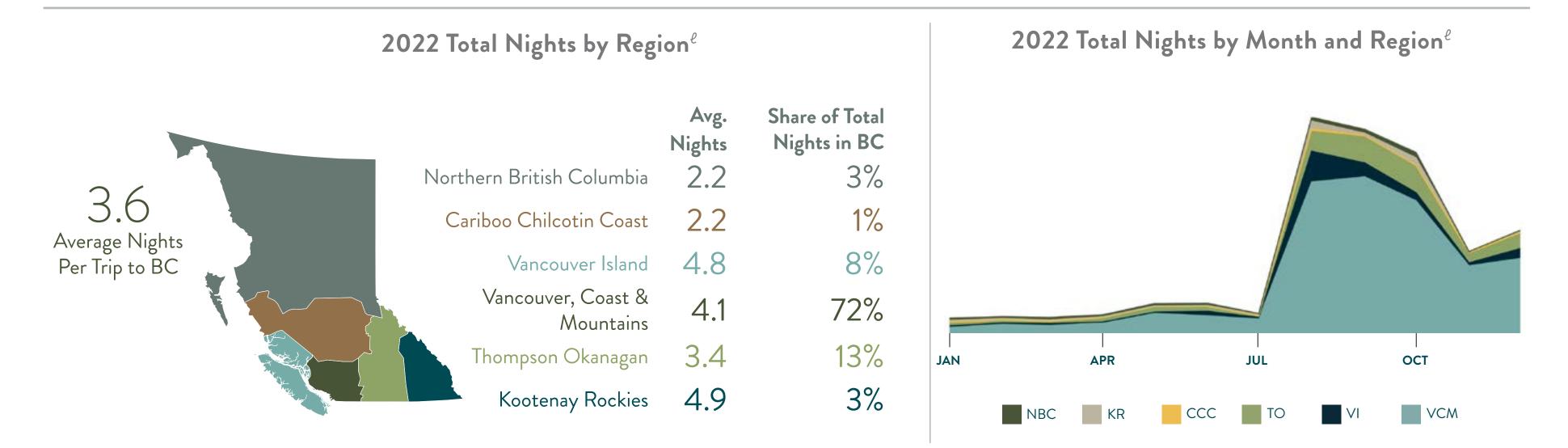
\$402

Transportation Used During Trip⁺

Private automobile		83%
Bus	12%	
Rented automobile	6%	
Ferry	5%	
Cruise ship	5%	
Train	5%	
Private boat	5%	
Commercial plane	4%	

Dispersion







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 (2019)
- Environics Analytics (2022) l
- *ll* Environics Analytics (2019)

 Π Phocuswright (2019)



MARKET PROFILES California

FEBRUARY 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

2022 Market Visitation Rank ⁺⁺



2022 Market Potential^{*}

17%

Likelihood to Visit BC in

the Next 2 Years





Future Travel Indicators



BC Residents' Comfort Welcoming US Visitors to Their Community ¶

Familiarity with BC as a Travel Destination[®]

65%

BC Performance

2022 Estimated Visitation⁺⁺



2022 Estimated Expenditure⁺⁺



Americans' Perception of Safety in Travelling to Canada**





Air Capacity to BC in 2023[¢]

Market Highlights



Canadian visitation from the US is forecasted to rebound to 82% of 2019 levels in 2023, with spending reaching up to 91% of 2019 levels.^e



US companies show a strong intention





24% California's Share of US Expenditures in BC

 $$517.9M_{2023 \ Forecasted \ Expenditure}$

2022 BC Travel Search Queries^A



SOURCES



- § Destination BC's Global Marketing Plan (2023)
- ++ Destination BC's Tabulations: Visitor Travel Survey (Statistics Canada) (2022)
- ≈ Destination BC's Key Performance Indicators Consumer Research (2022)
- ¶ Destination BC's Public Perceptions Tracker (December 2022)
- ♦ ForwardKeys (January 2023)
- △ Google InVITE Travel Search Queries (January 2023)



to resume business travel, with a full recovery anticipated by 2025.^e



American travellers view Canada as a safe and easy travel destination, propelling it to be one of the most desired foreign destinations for Americans to visit in the next year.^{**}



A less expensive Canadian dollar, as well as instability outside of North America, may drive increased US travel to Canada in 2023.^e

- Ω Touism Economics (2022)
- ** Destination Canada's US Sentiment for Travel to Canada (November 2022)
- ⊖ Destination Canada, Tourism Outlook (Fall 2022)
- ℓ Environics Analytics (2022)



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MARKET PROFILES California

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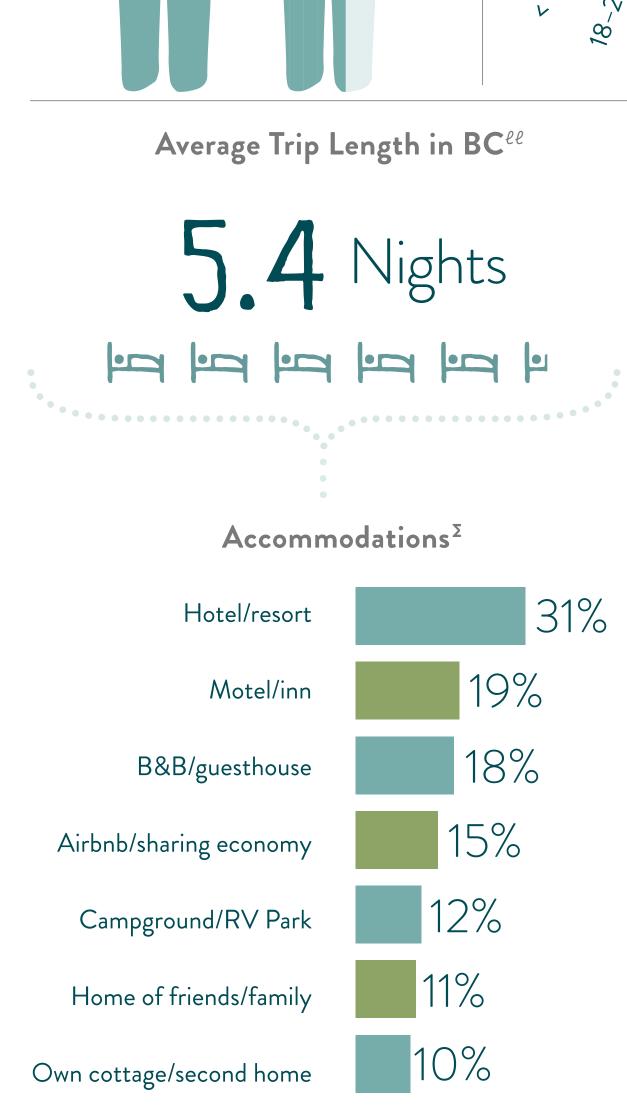
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FEBRUARY 2023

Traveller and Trip Characteristics



Incidence Rate



Future Travel Agent/Tour Operator Usage ⁵			
		Researching	Booking
Flights		21%	19%
Accommodations		19%	14%
🚌 Transportation		17%	13%
Activiti	es	14%	8%
The stine of the s	al Travel ations	27%	
	US Trave	• I Bookings ⁿ	
44% Offline	/ O4 Mobile	U	3% ne Supplier
56% Online	30/ Desktor	Ŭ Ŭ	7% Travel Agent

	Natural attractions	
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Shopping

Driving tours or road trips e

Average Spending Per Person in BC⁵

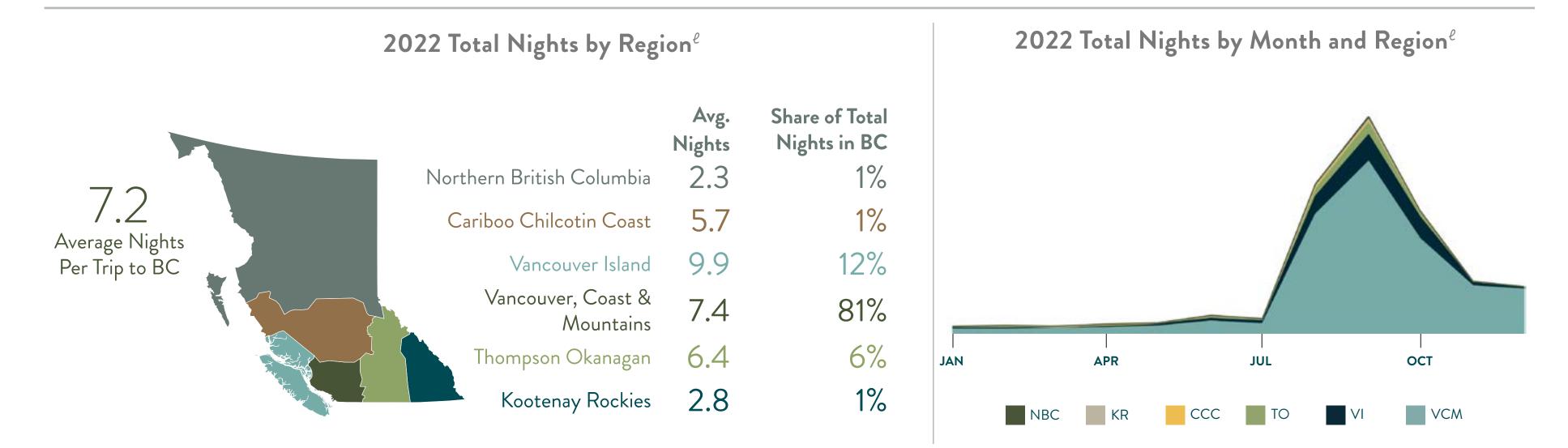
\$891

Transportation Used During Trip⁺

Private automobile	28%
Rented automobile	26%
Ferry	15%
Bus	10%
Commercial plane	8%
Train	5%
Cruise ship	2%
Private boat	0%

Dispersion





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 (2019)
- Environics Analytics (2022) l
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 Π Phocuswright (2019)