



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.

WASHINGTON

BRITISH COLUMBIA

Market Overview

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%

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 ^{††}

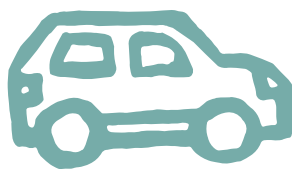


\$281.0M

21% Washington’s Share of US Expenditures in BC

\$438.4M 2023 Forecasted Expenditure

2022 Automobile Border Crossings into BC [∂]



+243%
Change Over 2021

2022 BC Travel Search Queries ^Δ



+130%
Change Over 2021

Future Travel Indicators

54%

BC Residents’ Comfort Welcoming US Visitors to Their Community ^{††}



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

67%

Believe Canada is Safe to Travel to



+3%

Change Over 2022

Air Capacity to BC in 2023 [∂]

Market Highlights



Following recent air travel issues, Americans are expressing an increased desire to take road trips. [✓]



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



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



DESTINATION
BRITISH COLUMBIA®

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)
Δ Google INVITE Travel Search Queries (January 2023)

- Ω Tourism Economics (2022)
** Destination Canada’s US Sentiment for Travel to Canada (November 2022)
∂ Statistics Canada, Integrated Primary Inspection Line (2022)
€ Destination Canada, Tourism Outlook (Fall 2022)
ℓ Environics Analytics (2022)

- ✓ The State of the American Traveler in January, Destination Analysts (January 2023)



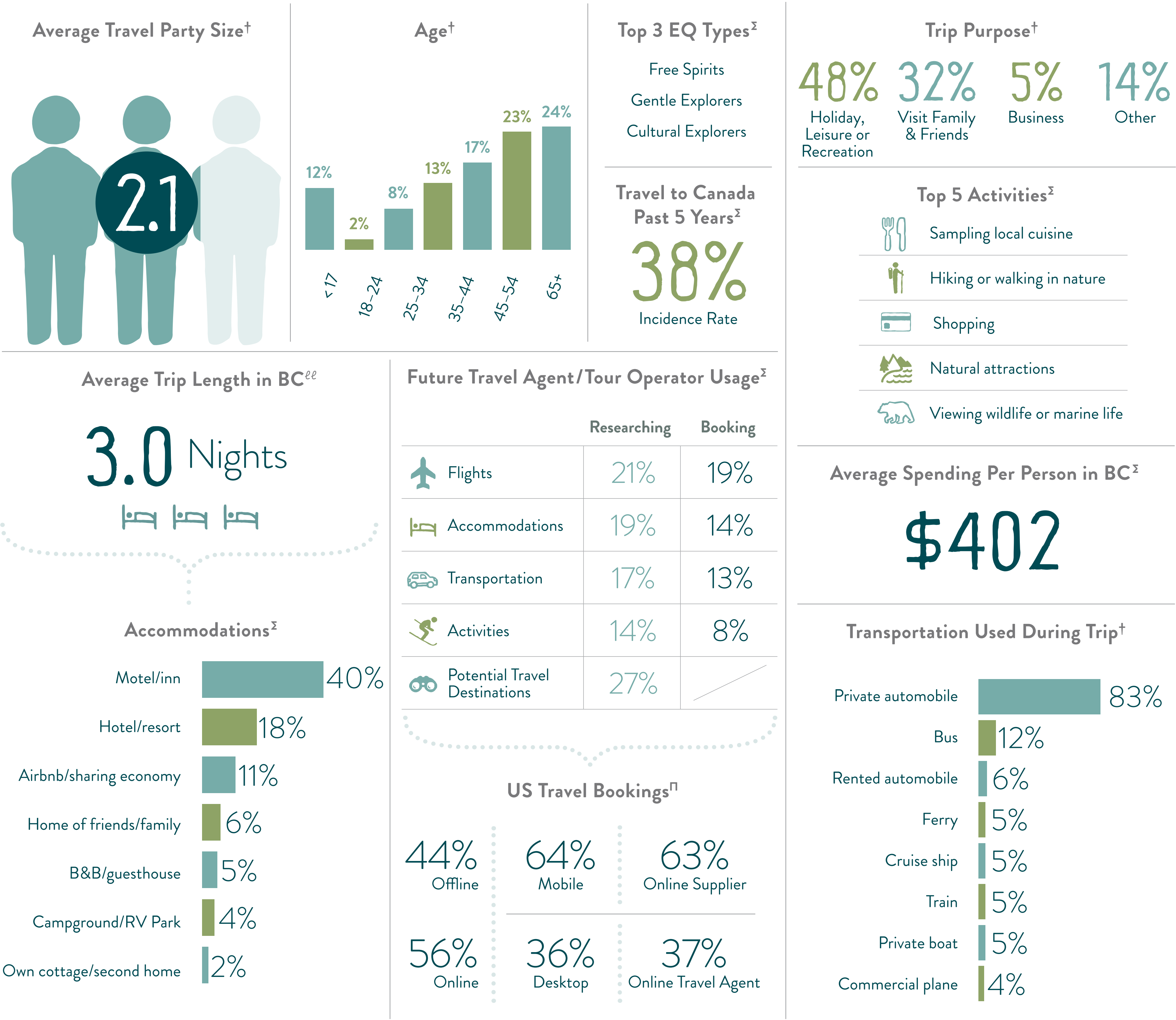
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Washington

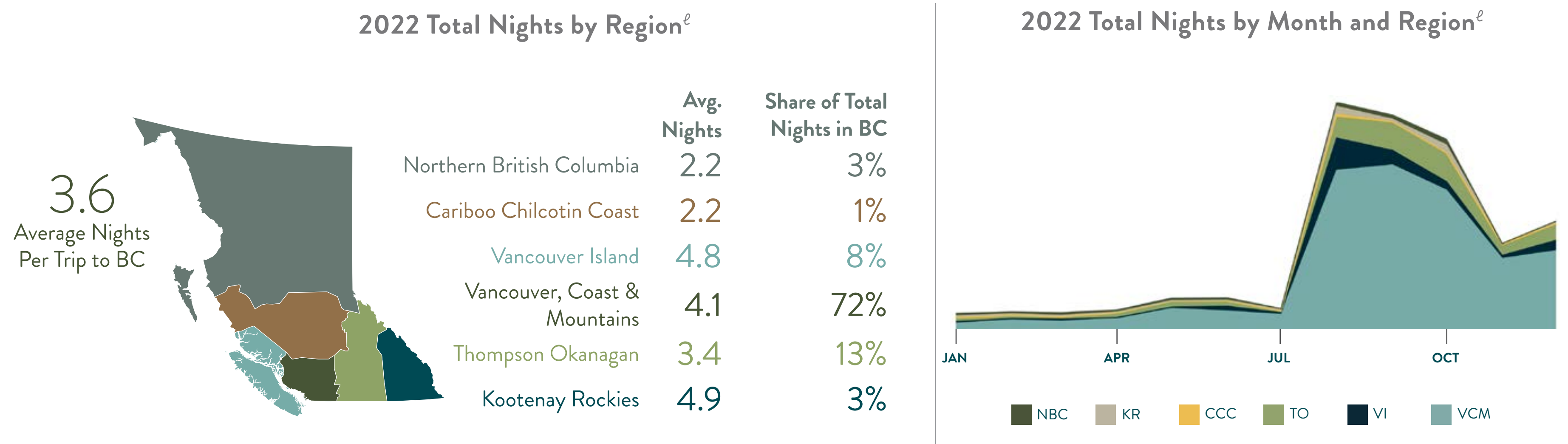
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Traveller and trip characteristics are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs. Seasonal and geographical dispersion is reflective of 2022.

Traveller and Trip Characteristics



Dispersion

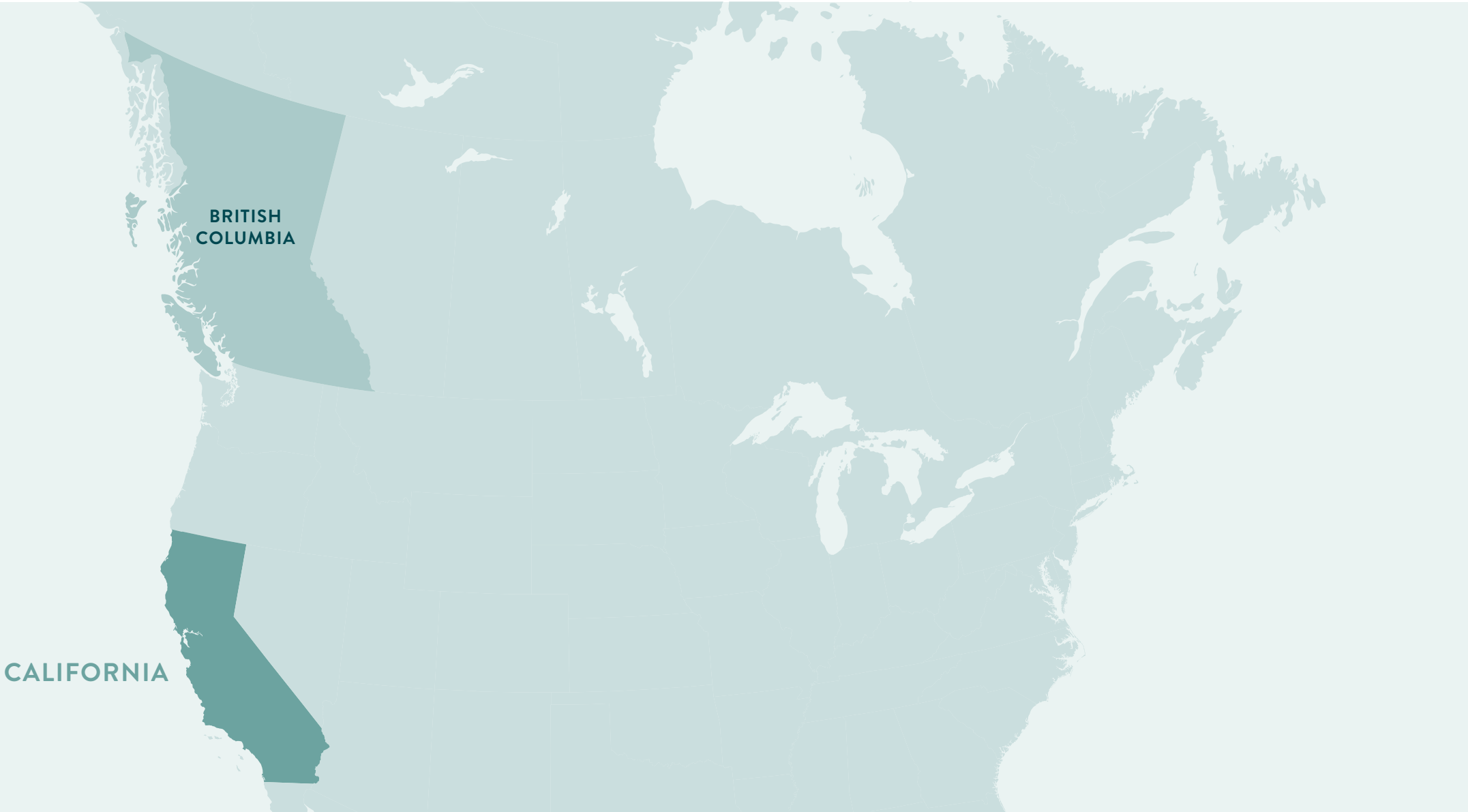


MARKET PROFILES

California

FEBRUARY 2023

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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

2022 Estimated Visitation ^{††}

358,000

18%

California’s Share of US Visitation in BC

537,000

2023 Forecasted Visitation

2022 Estimated Expenditure ^{††}

\$332.0M

24%

California’s Share of US Expenditures in BC

\$517.9M

2023 Forecasted Expenditure

2022 BC Travel Search Queries ^Δ

+75%

Change Over 2021

Future Travel Indicators

54%

BC Residents’ Comfort Welcoming US Visitors to Their Community ^{††}

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

67%

Believe Canada is Safe to Travel to

+28%

Change Over 2022

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 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

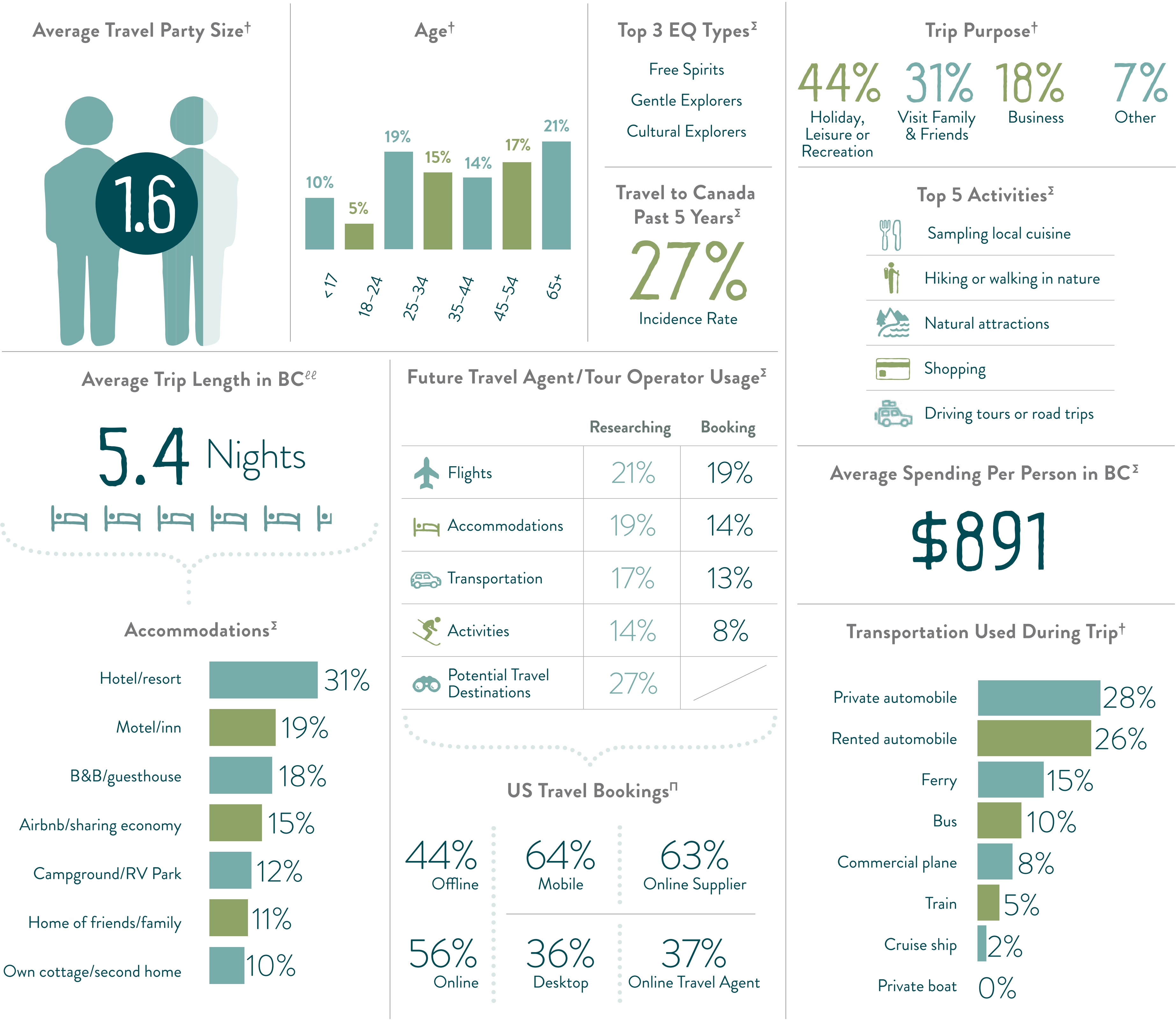
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California

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Traveller and Trip Characteristics



Dispersion

