MARKET PROFILES

Alberta

FEBRUARY 2023

The 2023 Domestic Market Profiles contain the latest information and highlights on Destination BC's key domestic 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[††]

#2

Canadian Market for BC in 2022

2023 Market Status[§]

Invest

Familiarity with BC as a Travel Destination[≈]

81%

BC Performance

2022 Estimated Visitation[††]

2,500,000

19% Alberta's Share of Canadian Visitation in BC

2,609,000 2023 Forecasted Visitation

2022 Estimated Expenditure[††]

$1,944M

21% Alberta's Share of Canadian Expenditures in BC

$2,110M 2023 Forecasted Expenditures

2022 BC Travel Search Queries[∆]

+0%

Change Over 2021

Future Travel Indicators

70% BC Residents' Comfort Welcoming Interprovincial Visitors to Their Community[¶]

Feel Safe to Travel Outside of Home Province within Canada[#]

88%

Likelihood to Visit BC in the Next 2 Years[≈]

48%

+7%

Change Over 2022

Air Capacity to BC in 2023[◊]

Market Highlights

Despite a mild to moderate recession in the early months of 2023, domestic travel is expected to fully recover and continue to expand in 2023, with travel spending expected to fully recover to 2019.[℮]

Albertan travellers widely view British Columbia as a destination with a strong commitment to environmentally sustainable tourism practices.[≈]

The Bank of Canada projects inflation to fall to approximately 3% by mid 2023, down from 6% in December, 2022. The decrease is driven by improving global supply conditions and falling energy prices.[∞]

DESTINATION BRITISH COLUMBIA®

SOURCES

†† Destination BC's Tabulations: National Travel Survey (Statistics Canada) (2022)
§ Destination BC Global Marketing Plan (2023)
¶ Destination BC's Public Perceptions Tracker (December 2022)
# Destination Canada's Public Perceptions Tracker (December 2022)
≈ Destination BC Key Performance Indicators Consumer Research (2022)
◊ ForwardKeys (January 2023)
∆ Google InVITE Travel Search Queries (January 2023)
℮ Destination Canada, Tourism Outlook (Fall 2022)
∞ The Conference Board of Canada (January 2023)

DOMESTIC

ALBERTA | BRITISH COLUMBIA | ONTARIO

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MARKET PROFILES

Alberta

FEBRUARY 2023

Traveller and trip characteristics, including dispersion of travel, are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs.

Traveller and Trip Characteristics

Average Travel Party Size[†]

Age[†]

19–24	25–34	35–44	45–54	55–64	65+
8%	27%	19%	13%	19%	14%

Top 3 EQ Types[Σ]

Free Spirits
Gentle Explorers
Authentic Experiencers

Travel to BC Past 5 Years[≈≈]

54%
Incidence Rate

Trip Purpose[†]

46%	36%	15%	3%
Holiday, Leisure or Recreation	Visit Family & Friends	Business	Other

Top 5 Activities[††]

- Trying local food and drink
- Hiking or walking in nature
- Natural attractions like mountains or waterfalls
- Road trips or driving tours
- Viewing wildlife or marine life

Average Spending Per Person in BC[†]

$461

Average Trip Length in BC[ℓℓ]

4 Nights

Future Travel Agent/Tour Operator Usage[Σ]

	Researching	Booking
Flights	3%	3%
Accommodations	3%	2%
Transportation	2%	2%
Activities	2%	2%
Potential Travel Destinations	2%	

Accommodations[Σ]

Mid-priced hotel/motel	20%
Budget hotel/motel	10%
Airbnb/sharing economy	8%
Home of family/friends	7%
Luxury hotel	6%
B&B/guesthouse	4%
Campground/RV park	3%
Own cottage/second home	2%

Transportation Used During Trip[†]

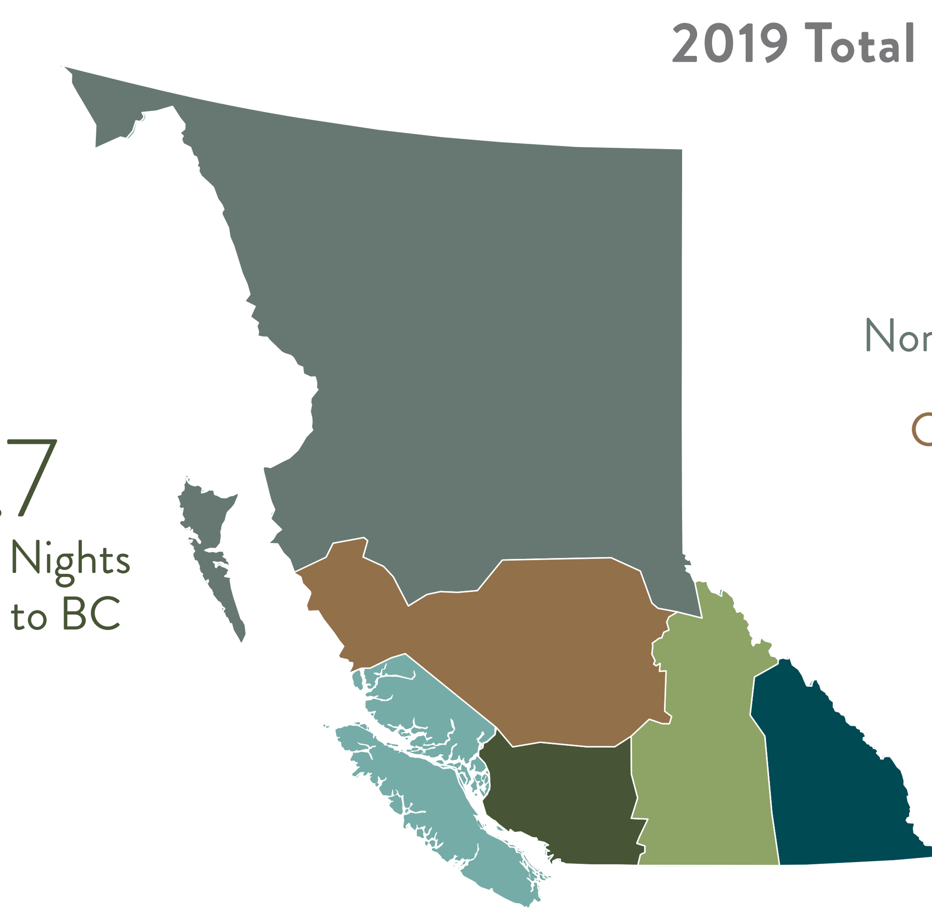
Private automobile	62%
Ferry	35%
Bus	2%
Rented automobile	1%
Commercial plane	0%
Train	0%
Cruise ship	0%

Travel Bookings[Π]

48% Offline	74% Mobile	56% Online Supplier
52% Online	26% Desktop	44% Online Travel Agent

2019 Total Nights by Region[ℓℓ]

4.7
Average Nights Per Trip to BC



	Avg. Nights	Share of Total Nights in BC
Northern British Columbia	5.0	5%
Cariboo Chilcotin Coast	3.2	1%
Vancouver Island	4.2	20%
Vancouver, Coast & Mountains	3.9	71%
Thompson Okanagan	3.3	16%
Kootenay Rockies	2.8	10%

DESTINATION BRITISH COLUMBIA®

SOURCES

† Destination BC's Tabulations: National Travel Survey (Statistics Canada) (2019)
Σ Destination Canada's Global Tourism Watch (Pooled 2018–2019)
≈≈ Destination BC Key Performance Indicators Consumer Research (2019)
ℓℓ Environics Analytics (2019)
Π Phocuswright (2019)

MARKET PROFILES

British Columbia

FEBUARY 2023

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Market Overview

2022 Market Visitation Rank ††

#1

Canadian Market for BC in 2022

2023 Market Status§

Invest

Familiarity with BC as a Travel Destination≈

91%

BC Performance

2022 Estimated Visitation††

9,446,000

71% BC Resident's Share of Canadian Visitation in BC

9,859,000 2023 Forecasted Visitation

2022 Estimated Expenditure††

$5,004M

55% BC Resident's Share of Canadian Expenditures in BC

$5,432M 2023 Forecasted Expenditures

2022 BC Travel Search Queries∆

+50%

Change Over 2021

Future Travel Indicators

77% BC Residents' Comfort Welcoming Intraprovincial Visitors to Their Community ¶

BC Residents Feel Safe to Travel within BC#

84%

Likelihood to Visit BC in the Next 2 Years≈

65%

+7%

Change Over 2022

Air Capacity in BC in 2023◊

Market Highlights

The Bank of Canada projects inflation to fall to approximately 3% by mid 2023, down from 6% in December, 2022. The decrease is driven by improving global supply conditions and falling energy prices.∞

BC Residents overwhelmingly agree that tourism plays an important role in the economic well-being of BC (90%), with more than half (54%) wanting to see more tourism in BC in the next five years.≤

Domestic travel spending is recovering rapidly, with spending expected to fully recover to 2019 levels in 2023.℮

DESTINATION BRITISH COLUMBIA®

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- ¶ Destination BC's Public Perceptions Tracker (December 2022)
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- ℮ Destination Canada, Tourism Outlook (Fall 2022)
- ∞ The Conference Board of Canada (January 2023)
- ≤ Destination BC's Public Perceptions of British Columbia's Tourism Industry (October 2022)

MARKET PROFILES

British Columbia

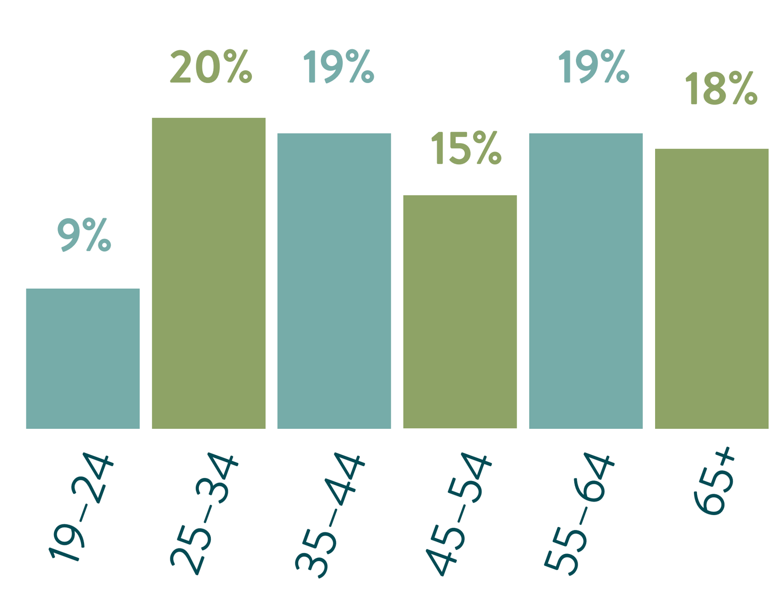
FEBUARY 2023

Traveller and trip characteristics, including dispersion of travel, are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs.

Traveller and Trip Characteristics

Average Travel Party Size[†]

Age[†]



Top 3 EQ Types[Σ]

Free Spirits

Cultural History Buffs

Gentle Explorers

Travel to BC Past 5 Years[≈≈]

89%

Incidence Rate

Trip Purpose[†]

42% Holiday, Leisure or Recreation

41% Visit Family & Friends

9% Business

9% Other

Top 5 Activities[≈]

- Visiting friends/relatives
- City/town sightseeing
- Beaches, lakes & rivers
- Shopping
- Sampling local cuisine

Average Spending Per Person in BC[†]

$341

Average Trip Length in BC[ℓℓ]

3.4 Nights

Future Travel Agent/Tour Operator Usage[Σ]

	Researching	Booking
Flights	6%	8%
Accommodations	7%	9%
Transportation	4%	4%
Activities	5%	4%
Potential Travel Destinations	4%	

Accommodations[≈]

Hotel/resort	43%
Home of family/friends	26%
Airbnb/sharing	11%
Motel/inn	11%
Campground/RV park	8%
B&B/guesthouse	5%
Own cottage/second home	3%

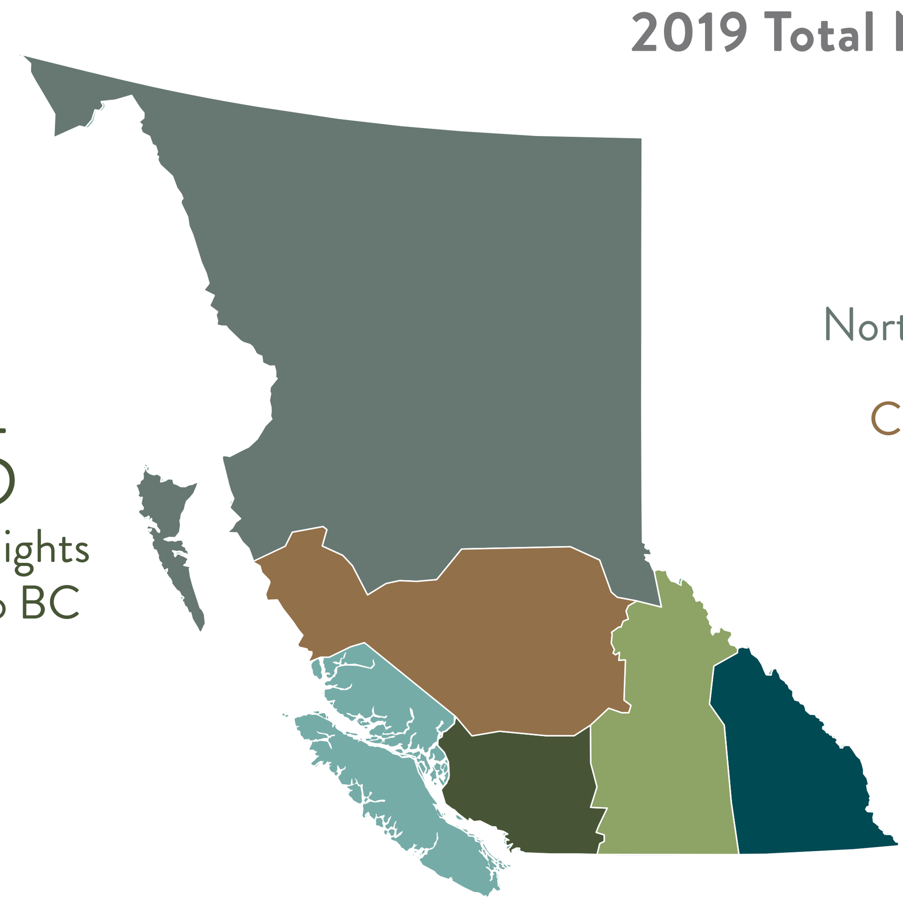
Transportation Used During Trip[†]

Private automobile	79%
Ferry	8%
Other	2%
Commercial plane	1%
Bus	0%
Commercial plane	0%
Train	0%

Travel Bookings[Π]

48% Offline	74% Mobile	56% Online Supplier
52% Online	26% Desktop	44% Online Travel Agent

2019 Total Nights by Region[ℓℓ]



3.5 Average Nights Per Trip to BC

	Avg. Nights	Share of Total Nights in BC
Northern British Columbia	4.2	10%
Cariboo Chilcotin Coast	2.8	5%
Vancouver Island	3.0	27%
Vancouver, Coast & Mountains	2.6	40%
Thompson Okanagan	2.9	29%
Kootenay Rockies	3.0	8%

SOURCES

† Destination BC's Tabulations: National Travel Survey (Statistics Canada) (2019)
Σ Destination Canada's Global Tourism Watch (Pooled 2018–2019)
≈≈ Destination BC Key Performance Indicators Consumer Research (2019)
ℓℓ Environics Analytics (2019)
Π Phocuswright (2019)

MARKET PROFILES

Ontario

FEBRUARY 2023

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Market Overview

2022 Market Visitation Rank ††

#3

Canadian Market for BC in 2022

2023 Market Status§

Invest

Familiarity with BC as a Travel Destination≈

76%

BC Performance

2022 Estimated Visitation††

858,000

6% Ontario's Share of Canadian Visitation in BC

848,000 2023 Forecasted Visitation

2022 Estimated Expenditure††

$1,501M

16% Ontario's Share of Canadian Expenditures in BC

$1,543M 2023 Forecasted Expenditures

2022 BC Travel Search Queries∆

+1%
Change Over 2021

Future Travel Indicators

70% BC Residents' Comfort Welcoming Interprovincial Visitors to Their Community ¶

Feel Safe to Travel Outside of Home Province within Canada#

68%

Likelihood to Visit BC in the Next 2 Years≈

21%

+12%
Change Over 2022

Air Capacity to BC in 2023◊

Market Highlights

There is strong demand for domestic travel, with worries over costs of living making travel within Canada more appealing for travelers from Ontario.℮

Ontario residents list BC as the most desired out-of-province destination, with travel most likely to occur during July (32%), August (28%) or June (26%).≥

The Bank of Canada projects inflation to fall to approximately 3% by mid 2023, down from 6% in December, 2022. The decrease is driven by improving global supply conditions and falling energy prices.∞

DESTINATION BRITISH COLUMBIA®

SOURCES

- †† Destination BC's Tabulations: National Travel Survey (Statistics Canada) (2022)
- § Destination BC Global Marketing Plan (2023)
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- ∆ Google InVITE Travel Search Queries (January 2023)
- ℮ Destination Canada, Tourism Outlook (Fall 2022)
- ∞ The Conference Board of Canada (January 2023)
- ≥ Destination Canada's Resident Sentiment (December 2022)

MARKET PROFILES

Ontario

FEBRUARY 2023

Traveller and trip characteristics, including dispersion of travel, are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs.

Traveller and Trip Characteristics

Average Travel Party Size†

Age†

Age	%
19–24	2%
25–34	29%
35–44	15%
45–54	9%
55–64	22%
65+	24%

Top 3 EQ Types$^{\Sigma}$

Free Spirits

Gentle Explorers

Authentic Experiencers

Travel to Canada Past 5 Years≈≈

45%

Incidence Rate

Trip Purpose†

26%	41%	28%	4%
Holiday, Leisure or Recreation	Visit Family & Friends	Business	Other

Top 5 Activities†

- Sampling local cuisine
- Hiking or walking in nature
- Natural attractions
- Nature parks and green spaces
- Viewing wildlife or marine life

Average Spending Per Person in BC†

$734

Average Trip Length in BCℓℓ

4.6 Nights

Future Travel Agent/Tour Operator Usage$^{\Sigma}$

	Researching	Booking
Flights	5%	8%
Accommodations	5%	5%
Transportation	3%	3%
Activities	3%	4%
Potential Travel Destinations	4%	

Accommodations$^{\Sigma}$

Accommodation	%
Mid-priced hotel/motel	21%
Luxury hotel/resort	12%
Airbnb/sharing economy	10%
Home of friends/family	10%
Budget hotel/motel	9%
B&B/guesthouse	6%
Campground/RV park	4%
Own cottage/second home	2%

Transportation Used During Trip†

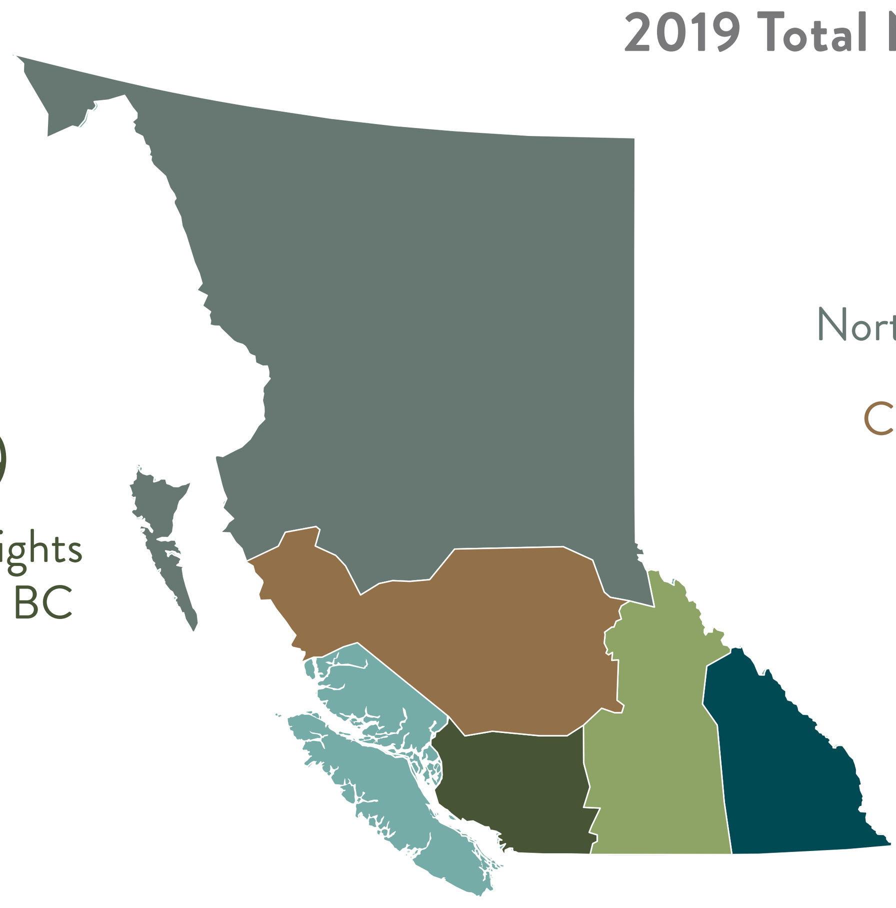
Transportation	%
Commercial plane	90%
Other	4%
Private automobile	3%
Ferry	1%
Train	1%
Commercial boat/cruise	0%
Bus	0%

Travel Bookings⊓

48% Offline	74% Mobile	56% Online Supplier
52% Online	26% Desktop	44% Online Travel Agent

2019 Total Nights by Regionℓℓ

3.9
Average Nights Per Trip to BC



	Avg. Nights	Share of Total Nights in BC
Northern British Columbia	4.4	11%
Cariboo Chilcotin Coast	2.8	1%
Vancouver Island	4.4	11%
Vancouver, Coast & Mountains	3.4	29%
Thompson Okanagan	3.3	31%
Kootenay Rockies	2.7	35%

SOURCES

† Destination BC's Tabulations: National Travel Survey (Statistics Canada) (2019)

Σ Destination Canada's Global Tourism Watch (Pooled 2018–2019)

≈≈ Destination BC Key Performance Indicators Consumer Research (2019)

ℓℓ Environics Analytics (2019)

⊓ Phocuswright (2019)