



MARKET PROFILES

Alberta

NOVEMBER 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 [§]

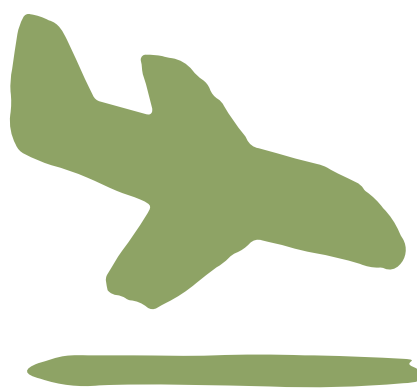
Invest

Familiarity with BC as a Travel Destination [≈]

80%

Future Travel Indicators

Air Capacity to BC in 2023 [◇]



+16.8%

Change Over 2022

BC Performance

2023 Estimated Visitation ^{††}



3,048,000

20%

Alberta’s Share of Canadian Visitation in BC

3,079,000

2024 Forecasted Visitation

2023 Estimated Expenditure ^{††}



\$2.43B

28%

Alberta’s Share of Canadian Expenditures in BC

\$2.53B

2024 Forecasted Expenditures

2022 BC Travel Search Queries ^Δ



+0%

Change Over 2021

Market Highlights



Despite high inflation, a slowing economy and high interest rates, Alberta is forecasted to recover to and exceed 2019 visitation levels by 13% in 2023. [Ⓔ]



Albertan travellers continue to view British Columbia as a positive, welcoming destination with a strong commitment to environmentally sustainable tourism practices. [Ⓔ]



Alberta’s air capacity is expected to contract marginally by 2% from January to June 2024, compared to the corresponding period in 2023. This slight decline might indicate a plateau in travel demand following post-pandemic adjustments. [◇]



For both in-province and out-of-province destinations, Canadians prioritize affordability, safety, and relaxation as top factors, with budget considerations affecting 34% to 39% of travellers. Cost is the primary barrier to domestic travel for 41% of Canadians, along with health considerations and the rising cost of gas. Eco-friendly travel options play a minor role in destination choice, influencing only 7% to 8% of decisions. [Ⓔ]



62% of Canadian residents actively avoid crowded destinations due to environmental and social considerations. While 46% reflect on their personal impact on travel destinations, only 8% factor in the availability of eco-friendly options, and 7% consider socially responsible travel options when choosing a destination. [Ⓔ]



The Bank of Canada projects inflation to stay at 3.5% until the middle of 2024, with a decline forecasted to 2.5% in the second half of 2024. [∞]



SOURCES



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Alberta

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

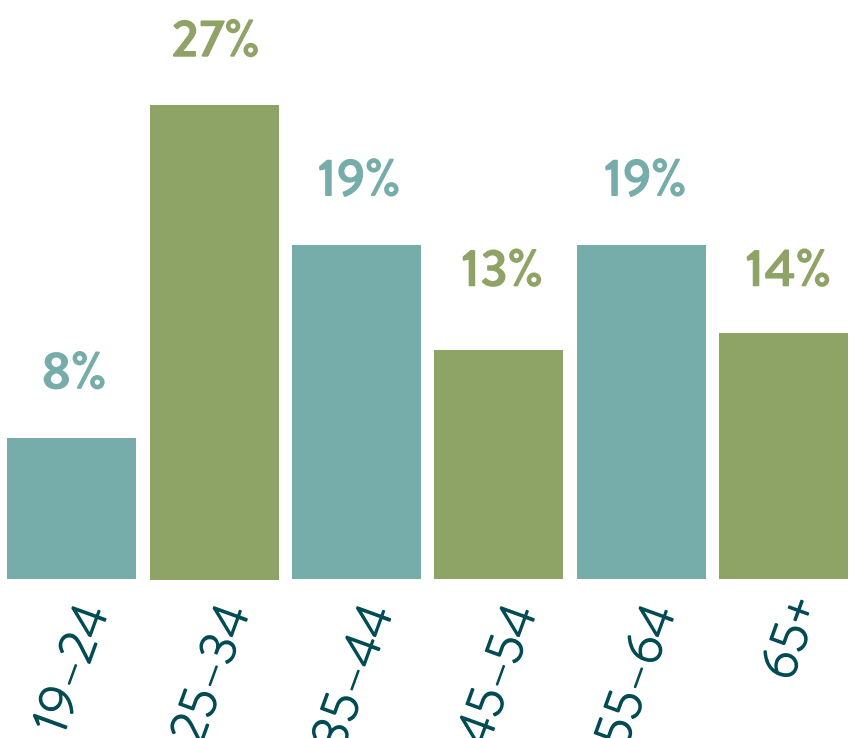


Traveller and Trip Characteristics

Average Travel Party Size[†]



Age[†]



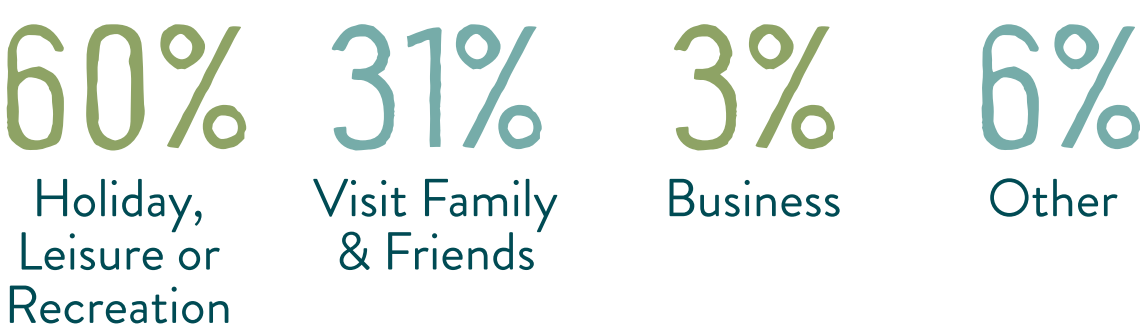
Top 3 EQ Types[‡]

Free Spirits
Gentle Explorers
Authentic Experiencers

Travel to BC
Past 5 Years[≈]



Trip Purpose[†]



Top 5 Activities^{††}

- Visit friends or family
- Go to restaurant, bar, or club
- Sightseeing
- National, Provincial, or nature park
- Shopping

Average Spending Per Person in BC[†]

\$810

Average Trip Length in BC^{ℓℓ}

3.9 Nights

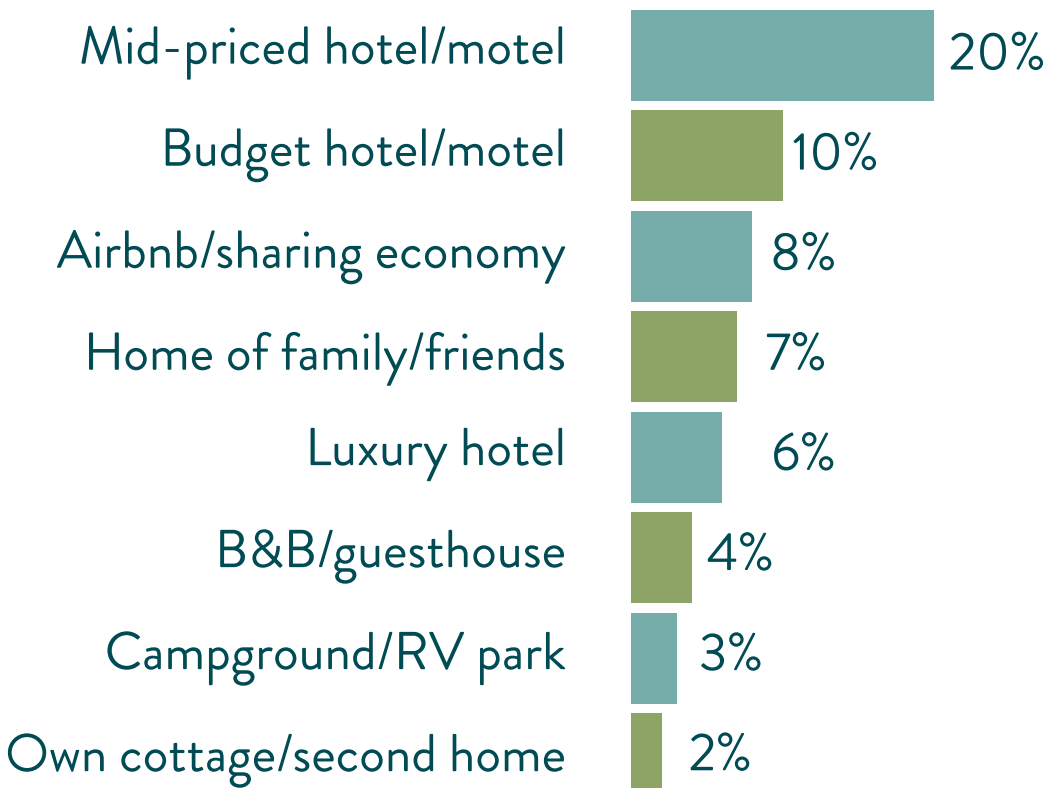


Future Travel Agent/Tour Operator Usage[‡]

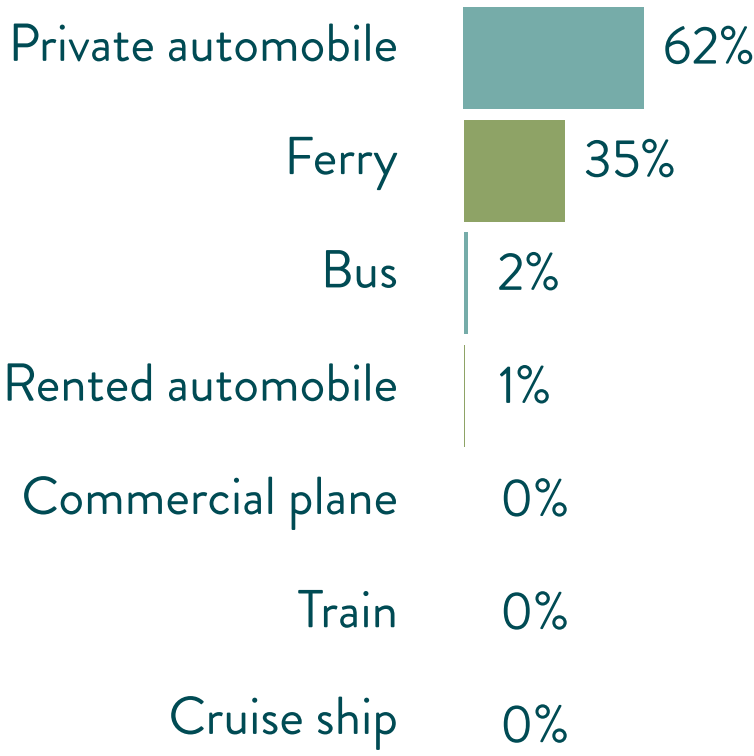
Researching Booking

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

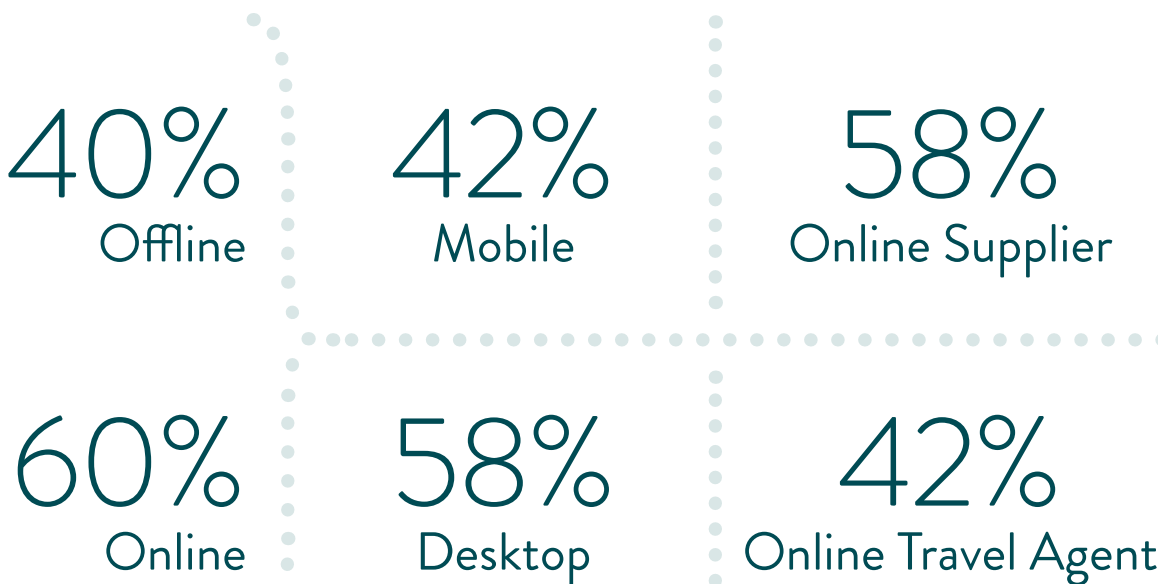
Accommodations[‡]



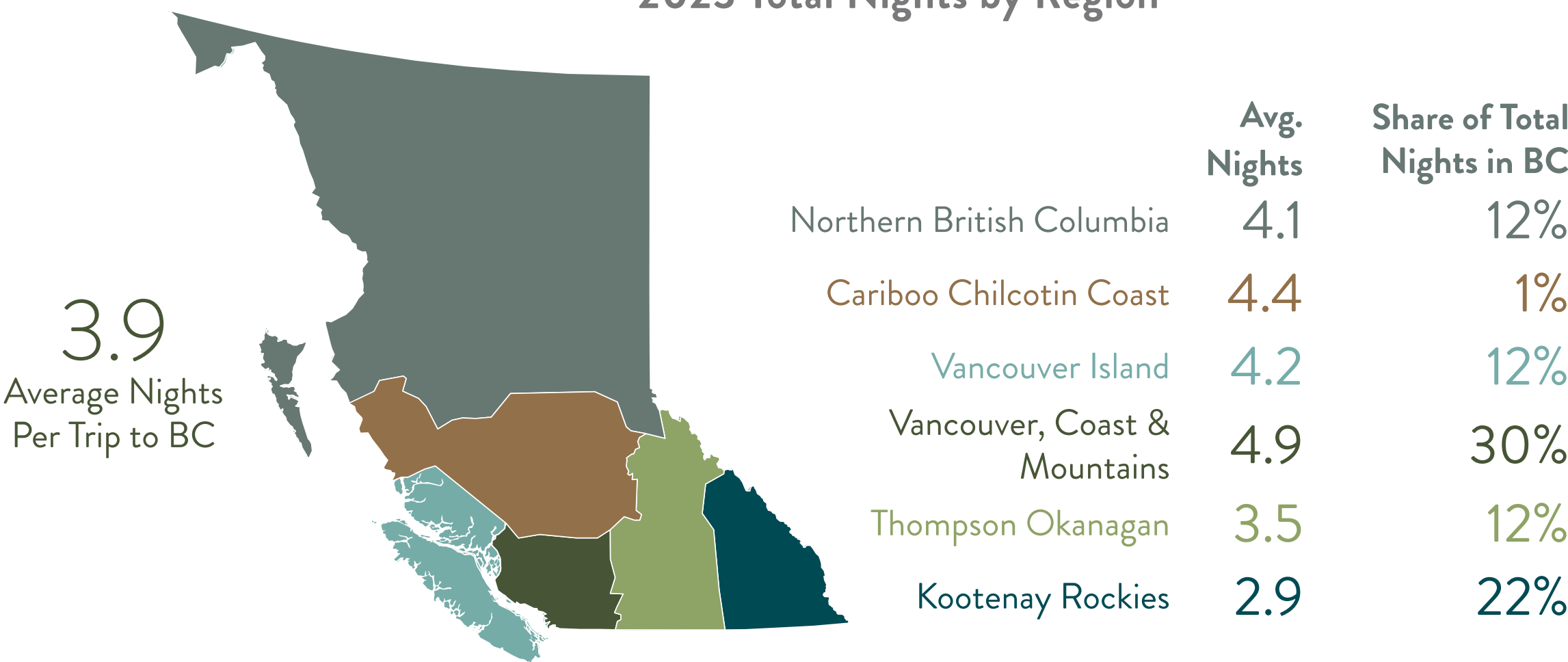
Transportation Used During Trip[†]



Travel Bookings[¶]



2023 Total Nights by Region^{ℓℓ}



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British Columbia

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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 [≈]

92%

BC Performance

2023 Estimated Visitation ^{††}




11,448,000

84% BC Resident’s Share of Canadian Visitation in BC

11,506,000 2024 Forecasted Visitation

2023 Estimated Expenditure ^{††}



\$7.01B

76% BC Resident’s Share of Canadian Expenditures in BC

\$7.25B 2024 Forecasted Expenditures

2022 BC Travel Search Queries ^Δ



+50%

Change Over 2021

Future Travel Indicators

Air Capacity to BC in 2023 [◇]



+7.2%

Change Over 2022

Market Highlights



Despite international travel increasing significantly and record high Average Daily Rates in the province, British Columbia is forecasted to recover to and exceed 2019 visitation levels by 16% in 2023.[Ⓔ]



Nine-in-ten British Columbia residents have taken at least one leisure trip within British Columbia in the past five years and intend to do so within two years. Furthermore, almost three-quarters of travellers from British Columbia are repeat travellers, having taken two or more trips in British Columbia within the past five years.[≤]



British Columbia is anticipated to experience a 5% contraction in air capacity during the first half of 2024 relative to the corresponding period in 2023, reflecting a change in internal travel preferences.[◇]



For both in-province and out-of-province destinations, Canadians prioritize affordability, safety, and relaxation as top factors, with budget considerations affecting 34% to 39% of travellers. Cost is the primary barrier to domestic travel for 41% of Canadians, along with health considerations and the rising cost of gas. Eco-friendly travel options play a minor role in destination choice, influencing only 7% to 8% of decisions.^μ



62% of Canadian residents actively avoid crowded destinations due to environmental and social considerations. While 46% reflect on their personal impact on travel destinations, only 8% factor in the availability of eco-friendly options, and 7% consider socially responsible travel options when choosing a destination.^μ



The Bank of Canada projects inflation to stay at 3.5% until the middle of 2024, with a decline forecasted to 2.5% in the second half of 2024.[∞]

SOURCES

- †† Destination BC’s Tabulations: National Travel Survey (Statistics Canada) (2023)
- § 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 (2023)

- ◇ ForwardKeys (2023)
- Δ Google InVITE Travel Search Queries (January 2023)
- Ⓔ Destination BC Visitation Forecast Calculations (2023)
- ≤ Destination BC Key Performance Indicators Consumer Research (2023)
- μ Destination Canada’s Global Tourism Watch (2021)
- ∞ Bank of Canada (October 2023)

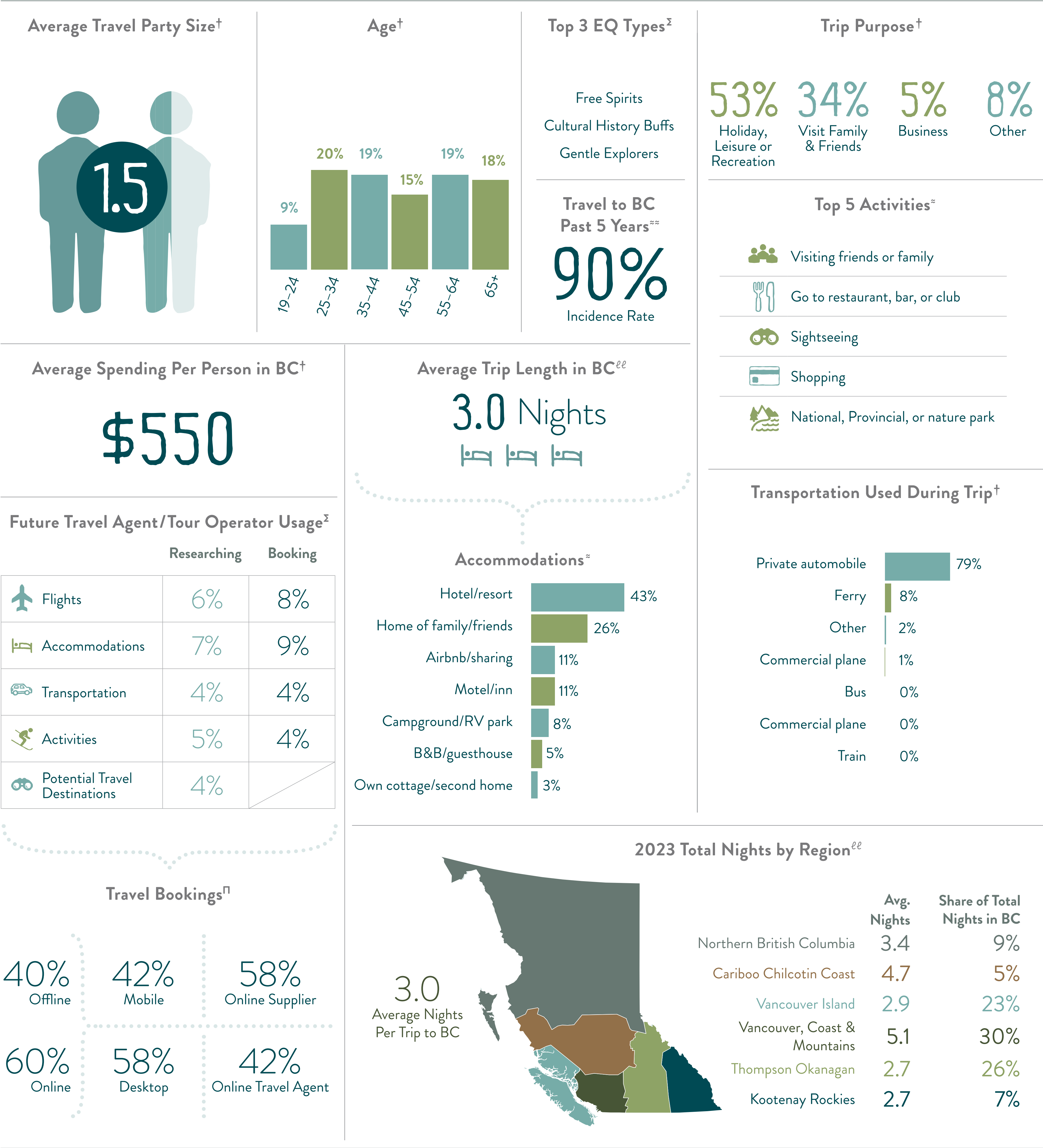
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British Columbia

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Traveller and Trip Characteristics



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Ontario

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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 [≈]

78%

BC Performance

2023 Estimated Visitation ^{††}



880,000

2% Ontario’s Share of Canadian
Visitation in BC

881,000 2024 Forecasted Visitation

2023 Estimated Expenditure ^{††}



\$2.43B

8% Ontario’s Share of Canadian
Expenditures in BC

\$2.53B 2024 Forecasted Expenditures

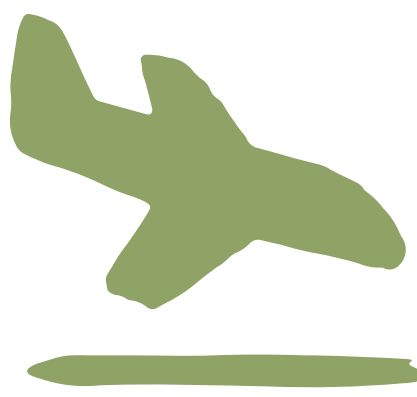
2022 BC Travel Search Queries ^Δ



+1%
Change Over 2021

Future Travel Indicators

Air Capacity to BC in 2023 [◇]



+21.5%

Change Over 2022

Market Highlights



British Columbia, known for its unique offerings, is expected to see an increase in visitors from Ontario. Projections indicate that the number of tourists from Ontario will surpass the 2019 levels by 3% in 2023. [€]



British Columbia is the destination that Greater Toronto Area (GTA) travellers are most likely to have visited in the past five years and is also the destination that GTA travellers have the strongest intentions to visit in the next two years in relation to other North American destinations. [≥]



Ontario’s air capacity is forecasted to expand by 2% from January to June 2024, in comparison to the same period in 2023, suggesting a consistency in travel activity. [◇]



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Ontario

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Traveller and Trip Characteristics

