

ALBERTA

BRITISH COLUMBIA

ONTARIO



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⁺⁺

2023 Market Status[§]



Invest

Future Travel Indicators

Air Capacity to BC in 2023⁴



Familiarity with BC as a Travel Destination²

Canadian Market for BC in 2022

80%

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⁺⁺





Change Over 2022

······ 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.^e



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 postpandemic 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.^µ

Alberta's Share of Canadian

 $$2.53B_{2024}$ Forecasted Expenditures

2022 BC Travel Search Queries[△]



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.⁴



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.[∞]



- ++ Destination BC's Tabulations: National Travel Survey (Statistics Canada) (2023)
- Destination BC Global Marketing Plan (2023)
- Destination BC's Public Perceptions Tracker (December 2022)
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- e Destination BC Visitation Forecast Calculations (2023)
- ≥ Destination BC Key Performance Indicators Consumer Research (2023)
- Destination Canada's Global Tourism Watch (2021) μ
- Bank of Canada (October 2023) ∞
- △ Google InVITE Travel Search Queries (January 2023)



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NOVEMBER 2023

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

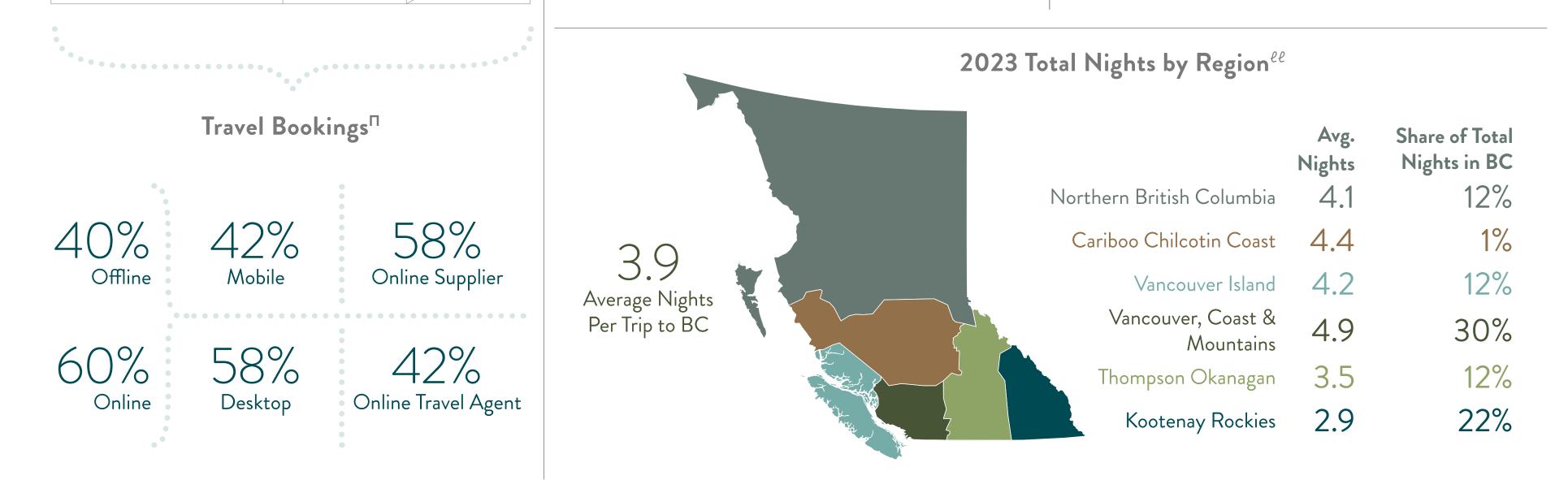
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Traveller and Trip Characteristics



		8% 5-34 25-34	$ \begin{array}{cccccccccccccccccccccccccccccccccccc$	Authentic Explorers Authentic Experiencers Travel to BC Past 5 Years ^{~~} 722/2 Incidence Rate	Holiday, Visit Family Business Othe Leisure or & Friends Recreation Top 5 Activities ⁺⁺ Wisit friends or family Go to restaurant, bar, or club Sightseeing
Average Spendin	ng Per Person	in BC [†]	Average Trip L	ength in BC ^{ee}	National, Provincial, or nature park
	210		3.9	Nights	Shopping
51					
Future Travel Agent	-	tor Usage ^Σ			Transportation Used During Trip ⁺
Future Travel Agent	t/Tour Operat Researching	tor Usage [∑] Booking	Accommo		Transportation Used During Trip ⁺ Private automobile 62%
Flights	-				
Flights	Researching 3%	Booking 3%	Accommo	odations ⁵	Private automobile 62%
	Researching	Booking	Accommo Mid-priced hotel/motel	odations ^Σ 20%	Private automobile 62% Ferry 35%
Flights	Researching 3% 3%	Booking 3% 2%	Accommo Mid-priced hotel/motel Budget hotel/motel	odations ^Σ 20%	Private automobile 62% Ferry 35% Bus 2% Rented automobile 1%
Flights	Researching 3%	Booking 3%	Accommo Mid-priced hotel/motel Budget hotel/motel Airbnb/sharing economy	odations ^Σ 20% 10% 8%	Private automobile 62% Ferry 35% Bus 2% Rented automobile 1% Commercial plane 0%
Flights	Researching 3% 3%	Booking 3% 2%	Accommo Mid-priced hotel/motel Budget hotel/motel Airbnb/sharing economy Home of family/friends	Adations ^Σ 20% 10% 8% 7%	Private automobile 62% Ferry 35% Bus 2% Rented automobile 1%





- 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 (2023)
- *ll* Environics Analytics (2022)
- Π Phocuswright (2023)

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MARKET PROFILES British Columbia

NOVEMBER 2023

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Market Overview

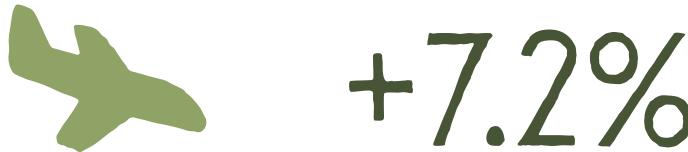
2022 Market Visitation Rank⁺⁺

2023 Market Status§

Invest

Future Travel Indicators

Air Capacity to BC in 2023[¢]





Familiarity with BC as a Travel Destination^{*}

Canadian Market for BC in 2022

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⁺⁺



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. $^{
m e}$

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

\$7.25B 2024 Forecasted Expenditures

2022 BC Travel Search Queries[△]





SOURCES

- ++ Destination BC's Tabulations: National Travel Survey (Statistics Canada) (2023)
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- ♦ ForwardKeys (2023)
- △ Google InVITE Travel Search Queries (January 2023)
- e Destination BC Visitation Forecast Calculations (2023)
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MARKET PROFILES British Columbia

NOVEMBER 2023

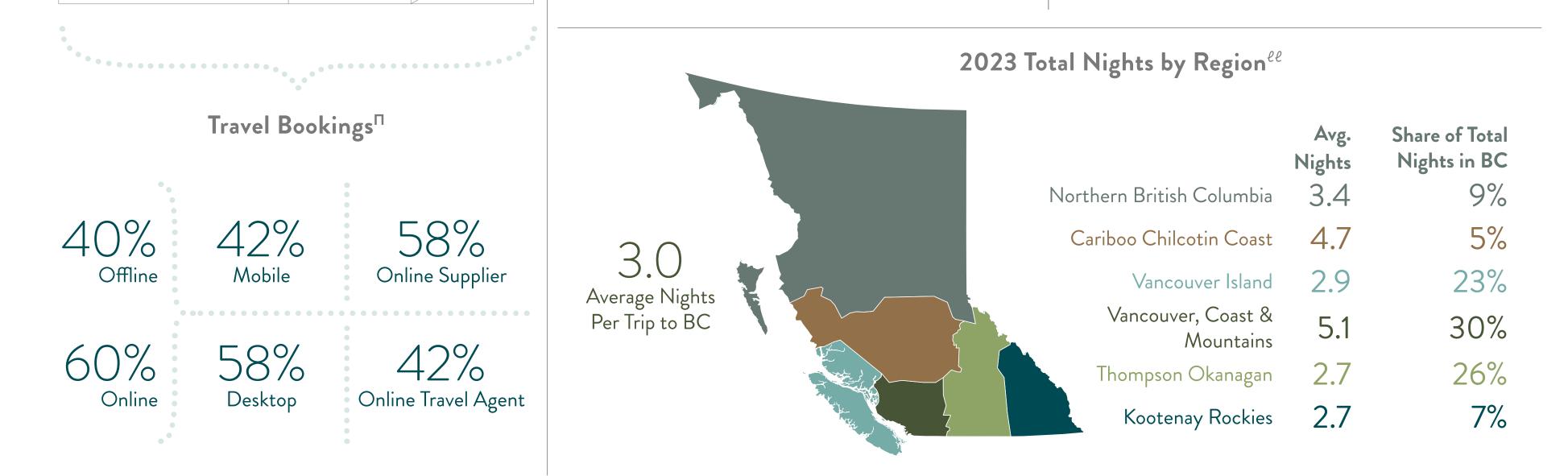
Traveller and trip characteristics, including dispersion of travel, are reflective of pre-pandemic travel. Characteristics will be updated as data availability occurs.



Traveller and Trip Characteristics



		209 9%	$ \begin{array}{ccccccccccccccccccccccccccccccccccc$	Gentle Explorers Travel to BC Past 5 Years [≈] 0000/00 Incidence Rate	Holiday, Visit Family E Leisure or Recreation Top 5 Activi Visiting friends or f Go to restaurant, b Sightseeing	amily
Average Spendir	ng Per Person	in BC ⁺	Average Trip L		Shopping	
\$	550		3.0 M	Nights A Ima	National, Provincia	l, or nature park
Future Travel Agen	t/Tour Opera	tor Usage [∑]		• • • • • • • • • • • • • • • • • • •	Transportation Used	During Trip ⁺
	Researching	Booking	Accommo	odations [≈]	Private automobile	79%
Flights	6%	8%	Hotel/resort	43%	Ferry 8	3%
			Home of family/friends	26%	Other 2	2%
Accommodations	7%	9%	Airbnb/sharing	11%	Commercial plane 1	%
😂 Transportation	4%	4%	Motel/inn	11%	Bus (0%
· · · · ·		10/	Campground/RV park	8%	Commercial plane (0%
Activities	5%	4%	B&B/guesthouse	5%	Train (0%
Potential Travel						





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MARKET PROFILES Ontario

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Market Overview

2022 Market Visitation Rank⁺⁺

2023 Market Status§

Invest

Future Travel Indicators

Air Capacity to BC in 2023⁴





Familiarity with BC as a Travel Destination^{*}

Canadian Market for BC in 2022

78%

BC Performance

2023 Estimated Visitation⁺⁺



2023 Estimated Expenditure⁺⁺



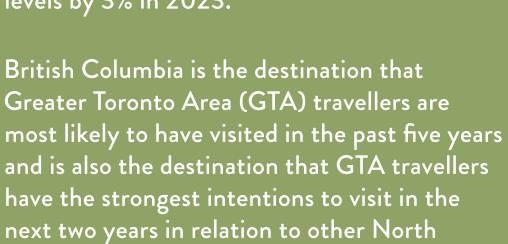
Change Over 2022

Market Highlights

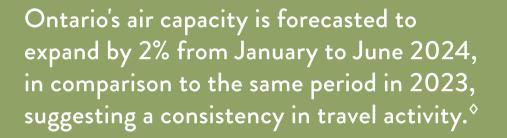


British Columbia, known for its unique offerings, is expected to see an increase in visitors from Ontario. Projections indicate that the number of tourists from Ontario will surpass the 2019 levels by 3% in 2023.^e









American destinations.[≥]

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

Ontario's Share of Canadian

\$2.53B 2024 Forecasted Expenditures

2022 BC Travel Search Queries[△]



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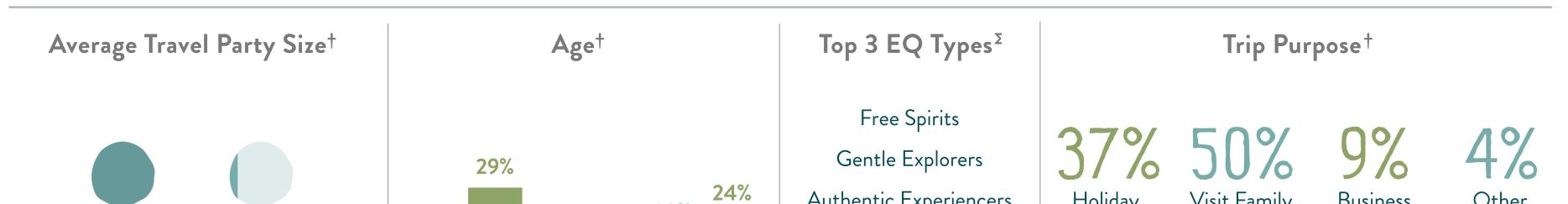
BRITISH COLUMBIA

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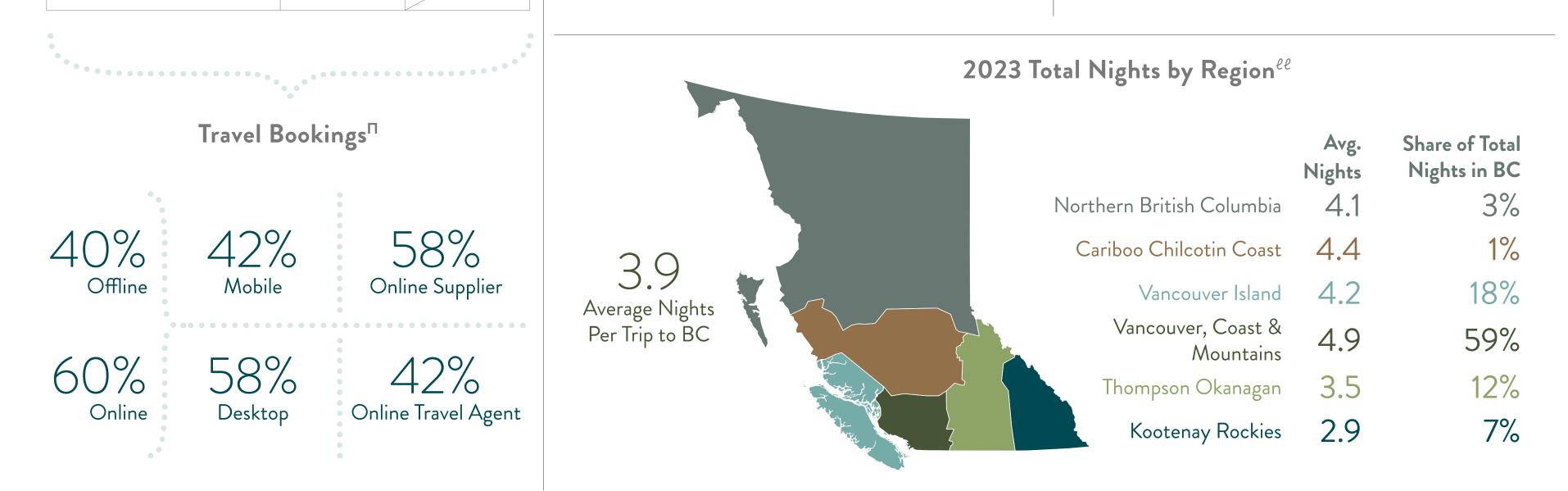
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Traveller and Trip Characteristics



			22%	, 	Holiday, Leisure or Recreation	& Friends		
		2%	9%	Travel to Canada Past 5 Years ^{≈≈}		Top 5 Ac	tivities †	
				ろわ く	C	Sightseeing		
		19-24 25-34	35-44 45-54 55-64 65+	JU/o	ŸJ	Go to restaur	rant, bar, or	club
				Incidence Rate		Visit friends o	or family	
Average Spending Per Person in BC ⁺			Average Trip Length in BC ^{ee}		Shopping			
ተ1	070		3.9	Vights		National, Pro	ovincial, or n	ature park
⊅۱,	020							
•			•	•				
				• • • • • • • • • • • • • • • • • • • •	Trans	sportation Us	sed Durin	g Trip ⁺
Future Travel Agen	t/Tour Opera	tor Usage [∑]		•	Trans	sportation Us	sed Durin	ng Trip†
Future Travel Agen	t/Tour Opera Researching	tor Usage [∑] Booking	Accommo	odations ⁵		portation Us mercial plane	sed Durin	90%
			Accommo Mid-priced hotel/motel	odations ^Σ 21%		•	sed Durin 4%	
	Researching 5%	Booking 8%			Com	mercial plane		
Flights	Researching	Booking	Mid-priced hotel/motel	21%	Com	imercial plane Other	4%	
Flights	Researching 5%	Booking 8%	Mid-priced hotel/motel Luxury hotel/resort Airbnb/sharing economy Home of friends/family	21% 12% 10% 10%	Com	mercial plane Other te automobile	4% 3%	
Flights Carteria Accommodations Transportation	Researching 5% 5% 3%	Booking 8% 5% 3%	Mid-priced hotel/motel Luxury hotel/resort Airbnb/sharing economy Home of friends/family Budget hotel/motel	21% 12% 10% 10% 9%	Com Privat	imercial plane Other te automobile Ferry	4% 3% 1%	
Accommodations	Researching 5% 5%	Booking 8% 5%	Mid-priced hotel/motel Luxury hotel/resort Airbnb/sharing economy Home of friends/family	21% 12% 10% 10%	Com Privat	mercial plane Other te automobile Ferry Train	4% 3% 1% 1%	





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