

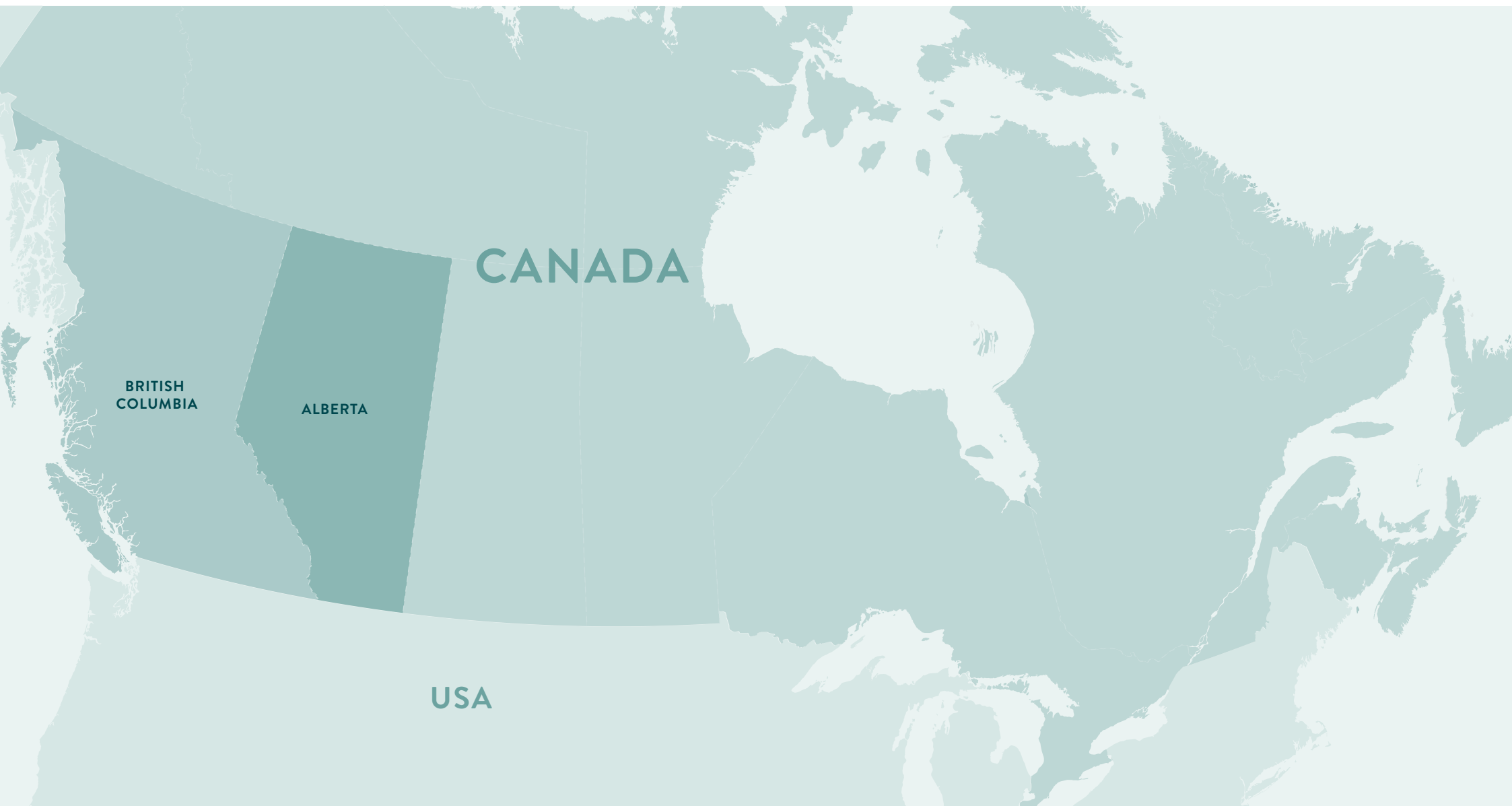


MARKET PROFILES

Alberta

DECEMBER 2024

The 2024 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

2023 Market Visitation Rank ^{††}

#2

Canadian Market for BC in 2023

2023 Market Status [§]

Grow Brand Affinity/Seasonal Dispersion

2023 Seasonal Dispersion Change [^]

+1.9_{PT}

2023 Off Peak Nights **70.2%**

Seasonal Dispersion is the % of nights spent in BC for all months outside of peak months of July and August.

2023 Geographical Dispersion Change [^]

+1.6_{PT}

2023 Emerging Destination Nights **62.3%**

Geographic Dispersion is the % of nights spent in BC for all destinations considered to be emerging.

Future Travel Indicators

Air Capacity to BC in 2023 [◇]



+16.1%
Change Over 2022

Flight Bookings in 2023 [◇]

+15.5%
Change Over 2022

BC Performance

2023 Estimated Visitation ^{††}



3,000,000

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

2023 BC Travel Search Queries [^]



-1%
Change Over 2022

Market Highlights



Alberta’s economy is expected to pick up this year, but will lag behind the province’s record increase. [Ⓔ]



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



International travel shifted from recovery to resilience—between August 2024 and January 2025, Alberta’s scheduled direct seat capacity across all international target markets exceeded pre-pandemic levels by over 11.3%. [◇]



In 2023, 17% of Canadians fell into the vacation deficit category—meaning that taking an annual vacation was important to them but they were not confident that they would take one. Among Canadians who were not confident they would take a trip in 2024, 68% cited not wanting to spend the money as the primary barrier. Of those who were planning a trip, 68% said they would be scaling back travel plans due to inflation. ^μ



Most domestic trips taken by Canadians were to visit friends and family or for holidays, leisure, or recreation. Canadians who took domestic trips reported participating in, among other activities, downhill skiing or snowboarding; hiking or backpacking; and visiting a national, provincial, or nature park. ^μ



Monetary policy is working to reduce price pressures in the Canadian economy. Inflation is expected to return sustainably to the 2% target in the second half of 2025. [∞]



61% of Canadians say that sustainability influences their travel decisions. Younger generations drive this trend. ^Ω



SOURCES

†† Destination BC’s Tabulations: National Travel Survey (Statistics Canada) (2023)
^ Destination BC’s Tabulations: Visitor Nights by Month and Regional District (Sept 2023–Aug 2024)
§ 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)
◇ TravelAlberta.ca
Ⓔ Alberta.ca
≥ Destination BC Key Performance Indicators Consumer Research (2023)

μ Ipsos Vacation Confidence Study (November 2023)
∞ Bank of Canada (July 2024)
Δ Google InVITE Travel Search Queries (July 2024)
Ω The new Portrait of American and Canadian International Travelers Study



ALBERTA

BRITISH COLUMBIA

ONTARIO

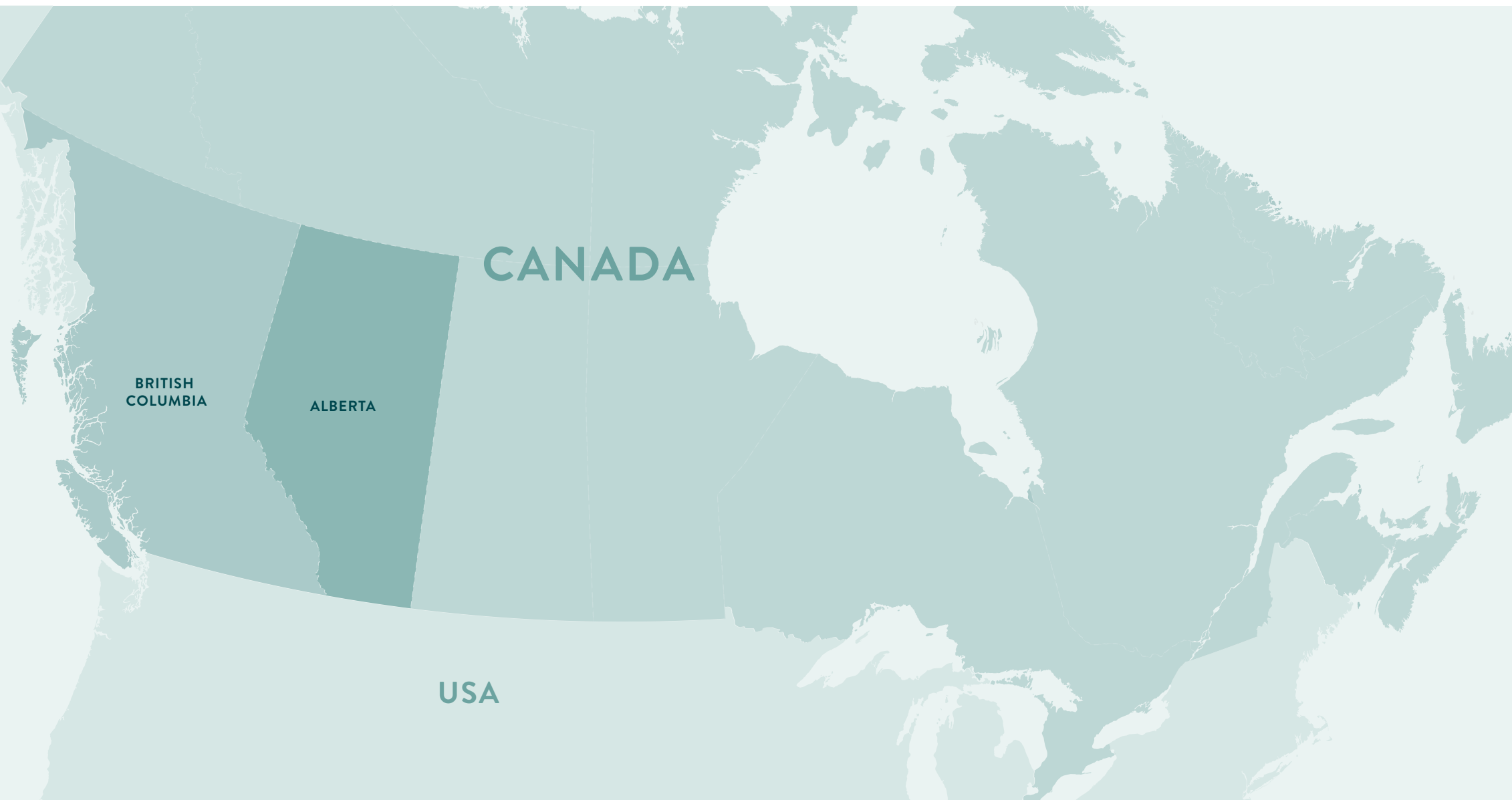
To navigate, please click on the flags or scroll down.

MARKET PROFILES

Alberta

DECEMBER 2024

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

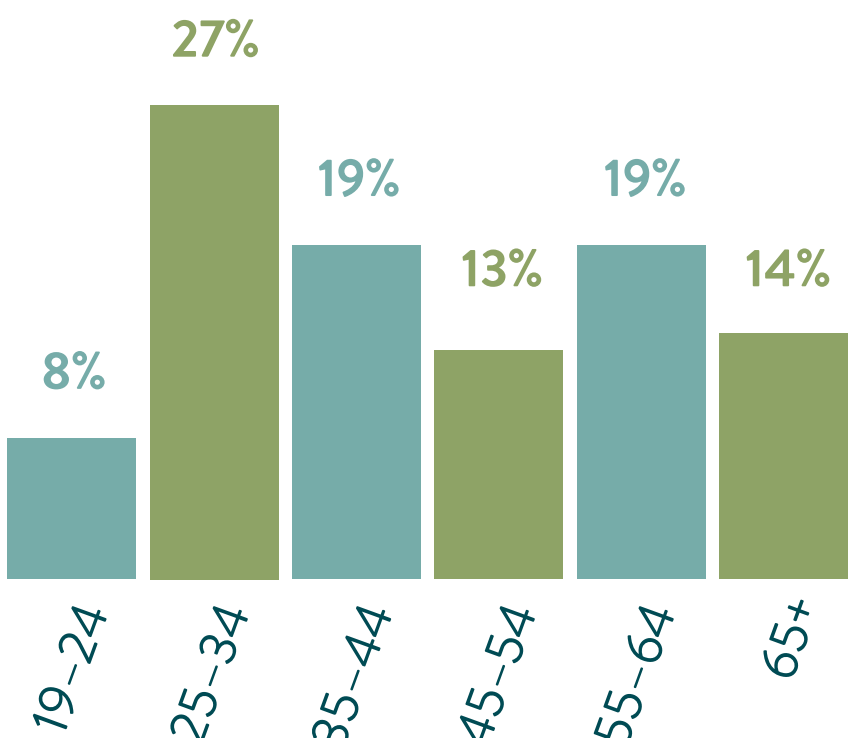


Traveller and Trip Characteristics

Average Travel Party Size[†]



Age[†]



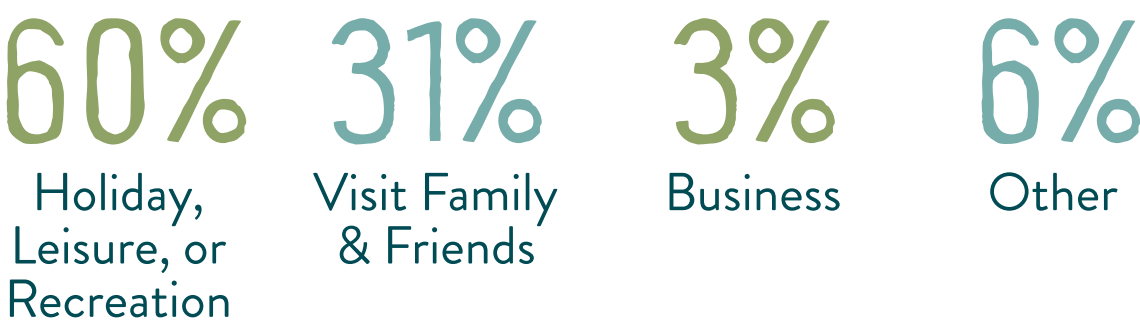
Familiarity with BC as a Travel Destination[≈]

80%

Travel to BC Past 5 Years^{≈≈}

72%
Incidence Rate

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}

3.3 Nights

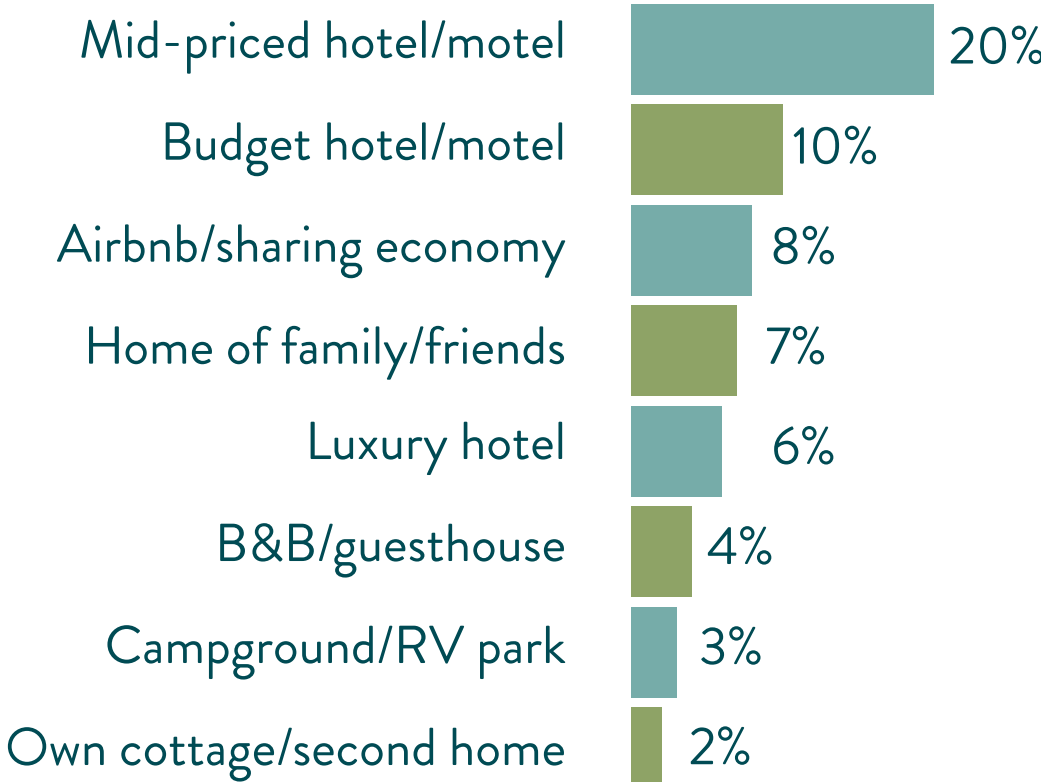


Future Travel Agent/Tour Operator Usage^Σ

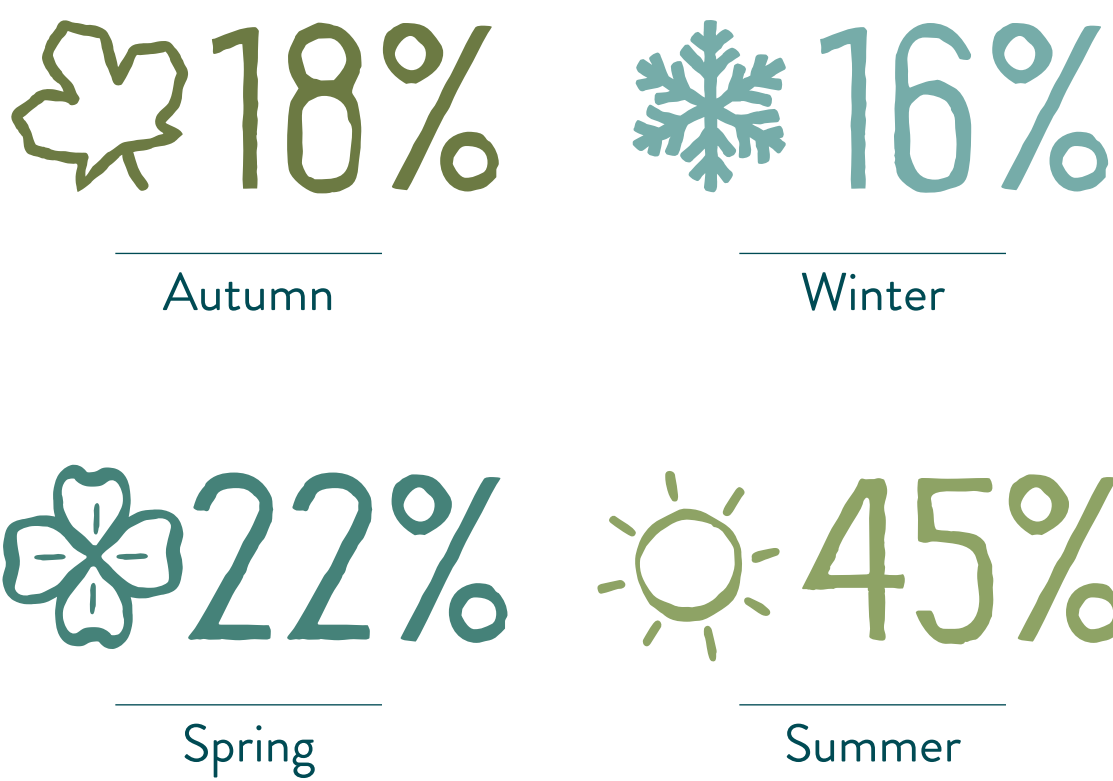
Researching Booking

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

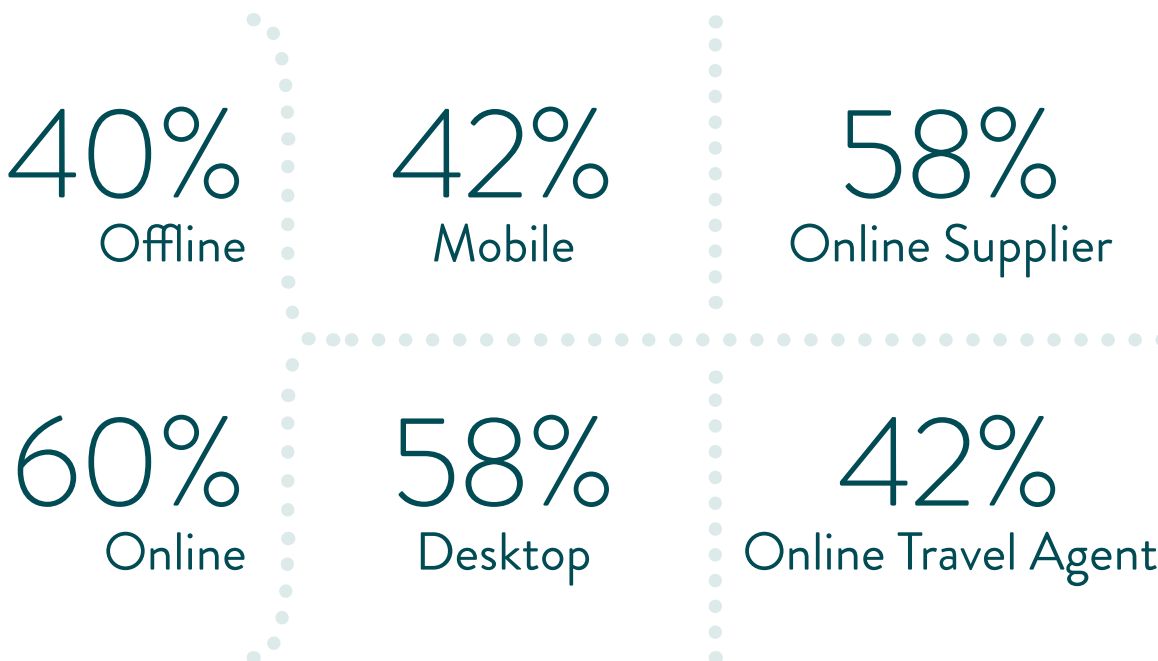
Accommodations^Σ



2023/24 Total Nights by Season[^]



Travel Bookings^Π



2023 Total Nights by Region^{ℓℓ}



MARKET PROFILES

British Columbia

DECEMBER 2024

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Market Overview

2023 Market Visitation Rank ^{††}

#1

Canadian Market for BC in 2023

2023 Market Status[§]

Grow Brand Affinity/Seasonal Dispersion

2023 Seasonal Dispersion Change^Δ

+1.6_{PT}

2023 Off Peak Nights **73.2%**

Seasonal Dispersion is the % of nights spent in BC for all months outside of peak months of July and August.

2023 Geographical Dispersion Change^Δ


-1.2_{PT}

2023 Emerging Destination Nights **66.6%**

Geographic Dispersion is the % of nights spent in BC for all destinations considered to be emerging.

BC Performance

2023 Estimated Visitation^{††}




11,400,000

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

2023 BC Travel Search Queries^Δ



-15%

Change Over 2022

Future Travel Indicators

Air Capacity to BC in 2023[◇]



+6.9%

Change Over 2022

Flight Bookings in 2023[◇]

+31.6%

Change Over 2022

Market Highlights



Despite international travel increasing significantly and record high Average Daily Rates in the province, British Columbia was forecast to recover to and exceed 2019 visitation levels by 16% in 2023.^ε



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.^ε



British Columbia was 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.[◇]



In 2023, 17% of Canadians fell into the vacation deficit category—meaning that taking an annual vacation was important to them but they were not confident that they would take one. Among Canadians who were not confident they would take a trip in 2024, 68% cited not wanting to spend the money as the primary barrier. Of those who were planning a trip, 68% said they would be scaling back travel plans due to inflation.^μ



Most domestic trips taken by Canadians were to visit friends and family or for holidays, leisure, or recreation. Canadians who took domestic trips reported participating in, among other activities, downhill skiing or snowboarding; hiking or backpacking; and visiting a national, provincial, or nature park.^μ



Monetary policy is working to reduce price pressures in the Canadian economy. Inflation is expected to return sustainably to the 2% target in the second half of 2025.[∞]



61% of Canadians say that sustainability influences their travel decisions. Younger generations drive this trend.^Ω

MARKET PROFILES

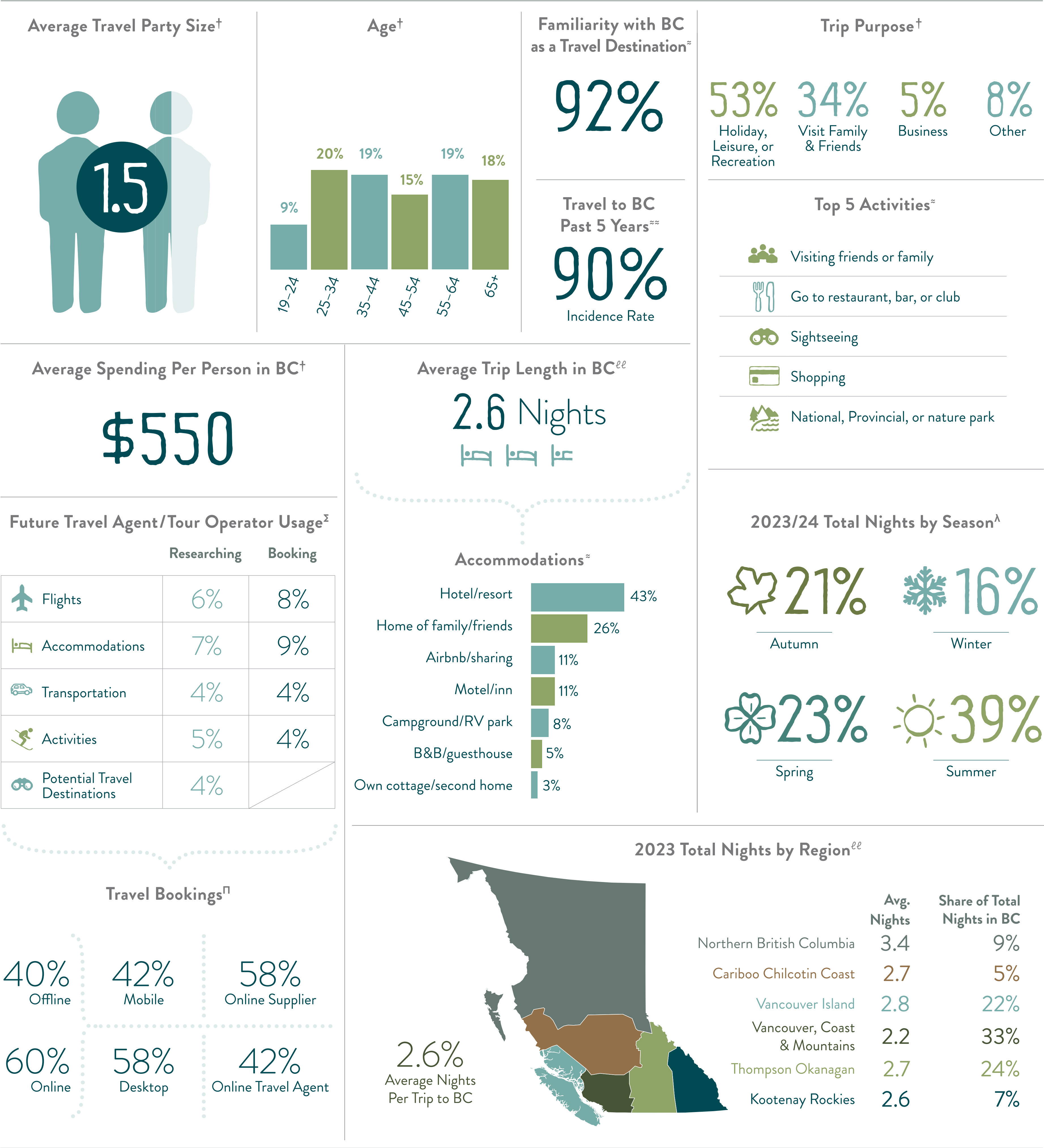
British Columbia

DECEMBER 2024

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Traveller and Trip Characteristics





MARKET PROFILES

Ontario

DECEMBER 2024

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Market Overview

2023 Market Visitation Rank ^{††}

#4

Canadian Market for BC in 2023

2023 Market Status [§]

Grow Brand Affinity/Seasonal Dispersion

2023 Seasonal Dispersion Change ^Δ

-0.9 _{PT}

2023 Off Peak Nights **73.5%**

Seasonal Dispersion is the % of nights spent in BC for all months outside of peak months of July and August.

2023 Geographical Dispersion Change ^Δ

-0.2 _{PT}

2023 Emerging Destination Nights **33.1%**

Geographic Dispersion is the % of nights spent in BC for all destinations considered to be emerging.

Future Travel Indicators

Air Capacity to BC in 2023 [◇]



+21.1%
Change Over 2022

Flight Bookings in 2023 [◇]

+11.3%
Change Over 2022

BC Performance

2023 Estimated Visitation ^{††}



900,000

2% Ontario’s Share of Canadian Visitation in BC

881,000 2024 Forecasted Visitation

2023 Estimated Expenditure ^{††}



\$1.49B

8% Ontario’s Share of Canadian Expenditures in BC

\$2.53B 2024 Forecasted Expenditures

2023 BC Travel Search Queries ^Δ



-1%
Change Over 2022

Market Highlights



British Columbia, known for its unique offerings, was expected to see an increase in visitors from Ontario. Projections indicated that the number of tourists from Ontario would have surpassed 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. [≥]



By the mid-2030s, passenger traffic numbers are anticipated to be about 85 million annually, suggesting a consistency in travel activity. [◇]



In 2023, 17% of Canadians fell into the vacation deficit category—meaning that taking an annual vacation was important to them but they were not confident that they would take one. Among Canadians who were not confident they would take a trip in 2024, 68% cited not wanting to spend the money as the primary barrier. Of those who were planning a trip, 68% said they would be scaling back travel plans due to inflation. [¶]



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- § 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)
- ◇ Toronto Pearson (2023)
- Δ Google InVITE Travel Search Queries (January 2023)
- Ⓔ Destination BC Visitation Forecast Calculations (2023)

- ≥ Destination BC Key Performance Indicators Consumer Research (2023)
- μ Ipsos Vacation Confidence Study (November 2023)
- ∞ Bank of Canada (July 2024)
- Ω The new Portrait of American and Canadian

MARKET PROFILES

Ontario

DECEMBER 2024

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Traveller and Trip Characteristics

