

ALBERTA

ONTARIO BRITISH COLUMBIA

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MARKET PROFILES Alberta

NOVEMBER 2021

The 2021 Domestic Market Profiles contain the latest information and highlights on Destination BC's key domestic markets. This publication summarizes each market, pre-COVID (2019), including the size of the market, volume and expenditures in BC, and traveller and trip characteristics. The latest market highlights and factors impacting and helping recovery of the markets as a result of COVID are also included. Highlights and factors are ever-changing-as such, those available here are time-stamped from the date of publication.



Market Overview

2019 Market Visitation Rank ⁺⁺

Market Status§

Factors Impacting/Helping Recovery

British Columbian's Comfort Welcoming Interprovincial Visitors[¶]



Of BC residents are comfortable welcoming visitors from other parts of Canada to their community (BC)

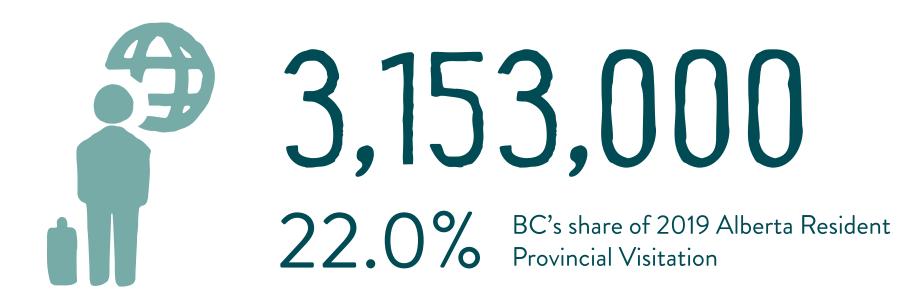


Invest

Domestic Market

BC Past Performance

2019 Reported Visitation⁺⁺



Willingness to **Receive Vaccine**[#]

87%

Support for Vaccine Passports for International Travel^{**}

78%

Likely to Take a Domestic Trip Outside of their Home **Province Next Year[†]**

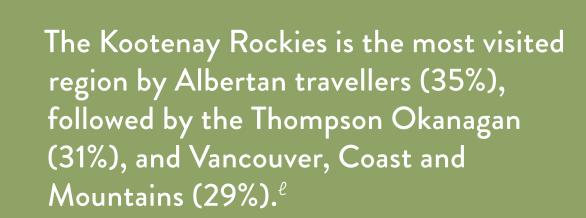
40%

Feel Safe Travelling to Other Provinces^Ω

69%

2019 Reported Expenditure⁺⁺





Market Highlights

2019 BC Travel Search Queries[△]



Albertan visitors spend the longest in Vancouver Island and Northern BC, with an average of 4.4 nights.^{ℓ}



As of November 5th, 2021, 67% of all Albertans are fully vaccinated.[‡]



Summer is the most popular season for Albertan visitors, accounting for 44% of visits.^e



2019 Air Capacity[♦]

-4.3%

SOURCES

- Destination Canada's Global Tourism Watch (2020)
- Destination BC Global Marketing Plan 2021
- Destination BC's BC Residents' Perceptions: COVID-19 Travel and Tourism T (September 2021)

4%

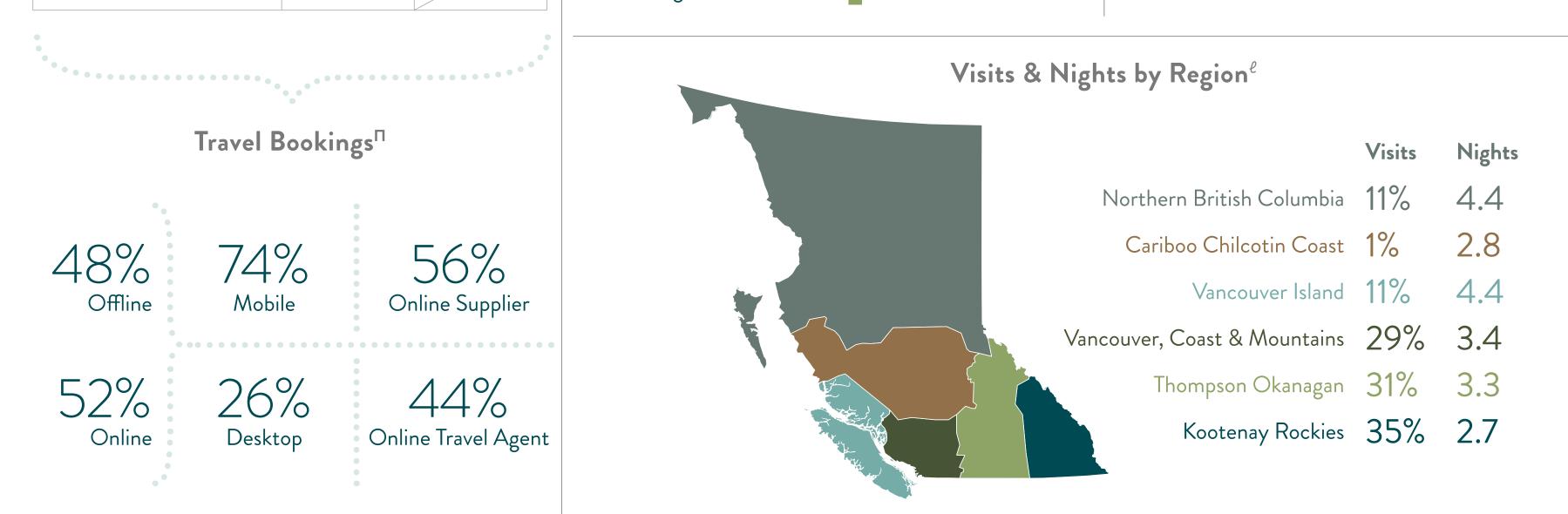
- # Morning Consult's Weekly Global Vaccine Tracking Survey (September 2021)
- ++ Destination BC Tabulations from the 2019 Visitor Travel Survey (Statistics Canada)
- ♦ ForwardKeys (2019)
- △ Google InVITE Travel Search Queries (2019 vs 2018)
- Ω Destination Canada's Canadian Resident Sentiment Survey (October 2021)
- ** Ipsos Global Views on Personal Health Data and Vaccine Passports Survey (April 2021)
- Environics Analytics (2019) l
- Public Health Agency Canada +



Traveller and Trip Characteristics



		8% 5 ⁻ 54 5 ⁻ 55	$ \begin{array}{cccccccccccccccccccccccccccccccccccc$	Authentic Explorers Authentic Experiencers Incidence of Past 5 Year Travel to BC [≈] 5544%	Leisure or & Recreation	Friends Busir Friends Fop 5 Activities al food and drink walking in nature tractions like mour	; ††	
Average Spendin	g Per Person	in BC ⁺⁺	Average Trip Length in BC ^e		Viewing wildlife or marine life			
\$2	161*		4 Nights		Travel Seasons ^e			
PHUI Average spending per person in BC					25% Spring	44% Summer	16% 14% Fall Winter	
Future Travel Agent		0						
	Researching	Booking	Accommo	Transport	tation Used Du	iring Trip ⁺⁺		
Flights	3%	3%	Mid-priced hotel/motel	20%	Private au	tomobile	62%	
Accommodations	3%	2%	Budget hotel/motel	10%		Ferry 3	35%	
Accommodations	J /0	Ζ/ο	Airbnb/sharing economy	8%		Bus 2%		
😂 Transportation	2%	2%	Home of family/friends Luxury hotel	7% 6%	Rented au	tomobile 1%		
Activities	2%	2%	B&B/guesthouse	4%	Commerc	'		
Potential Travel Destinations	2%		Campground/RV park Own cottage/second home	3% 2%	Cr	Train 0% ruise ship 0%		





- ++ Destination BC Tabulations from the 2019 National Travel Survey (Statistics Canada)
- ℓ Environics Analytics (2019)
- Σ Destination Canada's Global Tourism Watch (Pooled 2018-2020)
- Π Phocuswright (2019)
- ≈ Destination BC Key Performance Indicators Consumer Research (2019)

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MARKET PROFILES British Columbia

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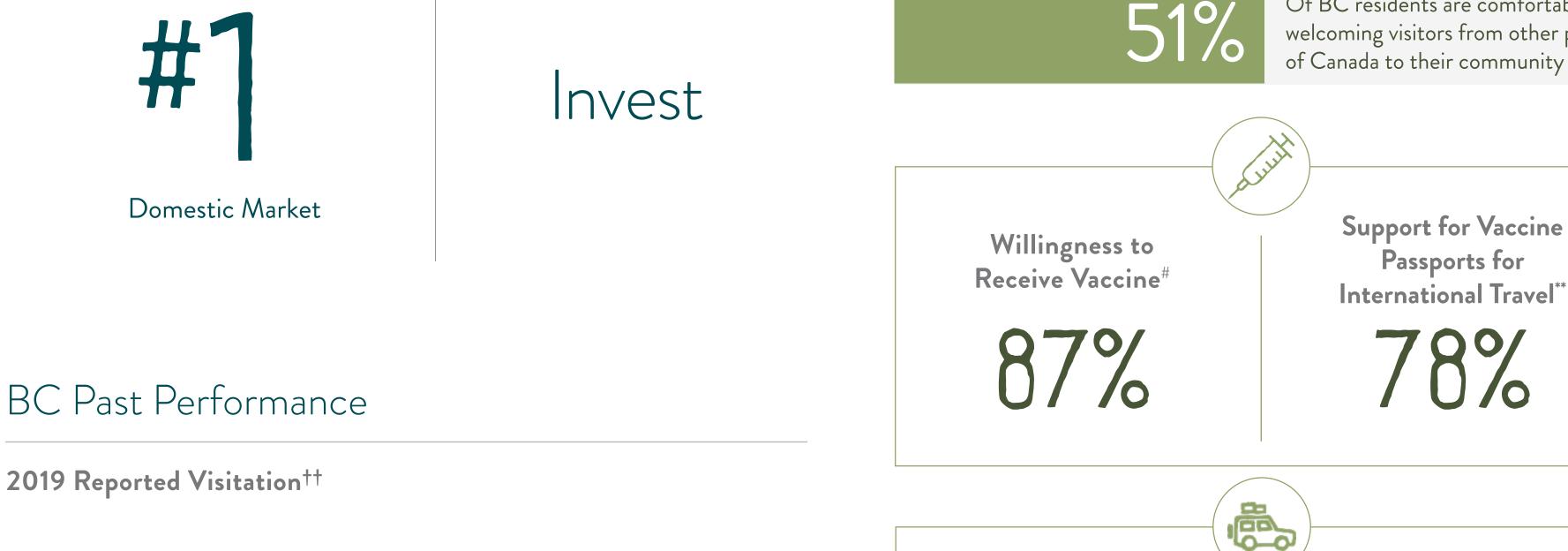
Market Overview

2019 Market Visitation Rank ++



Factors Impacting/Helping Recovery

British Columbian's Comfort Welcoming Interprovincial Visitors[¶]





Of BC residents are comfortable welcoming visitors from other parts of Canada to their community (BC)



2019 Reported Expenditure⁺⁺



Market Highlights

Have Overnight Travel Plans in BC Next Year[¶]

80%

As of October 13th, 2021, 81% of British Columbians intend to travel overnight in BC within the next year.¶

BC's share of 2019 BC Resident

2019 BC Travel Search Queries[△]



Northern BC has the highest number of nights spent per region, with BC travellers staying for an average of 4.2 nights in the region in 2019.^{ℓ}



As of November 5th, 2021, 76% of all British Columbians are fully vaccinated.[‡]



Vancouver, Coast and Mountains is the most visited region by British Columbians (40%), followed by Thompson Okanagan (29%) and Vancouver Island (27%).^e



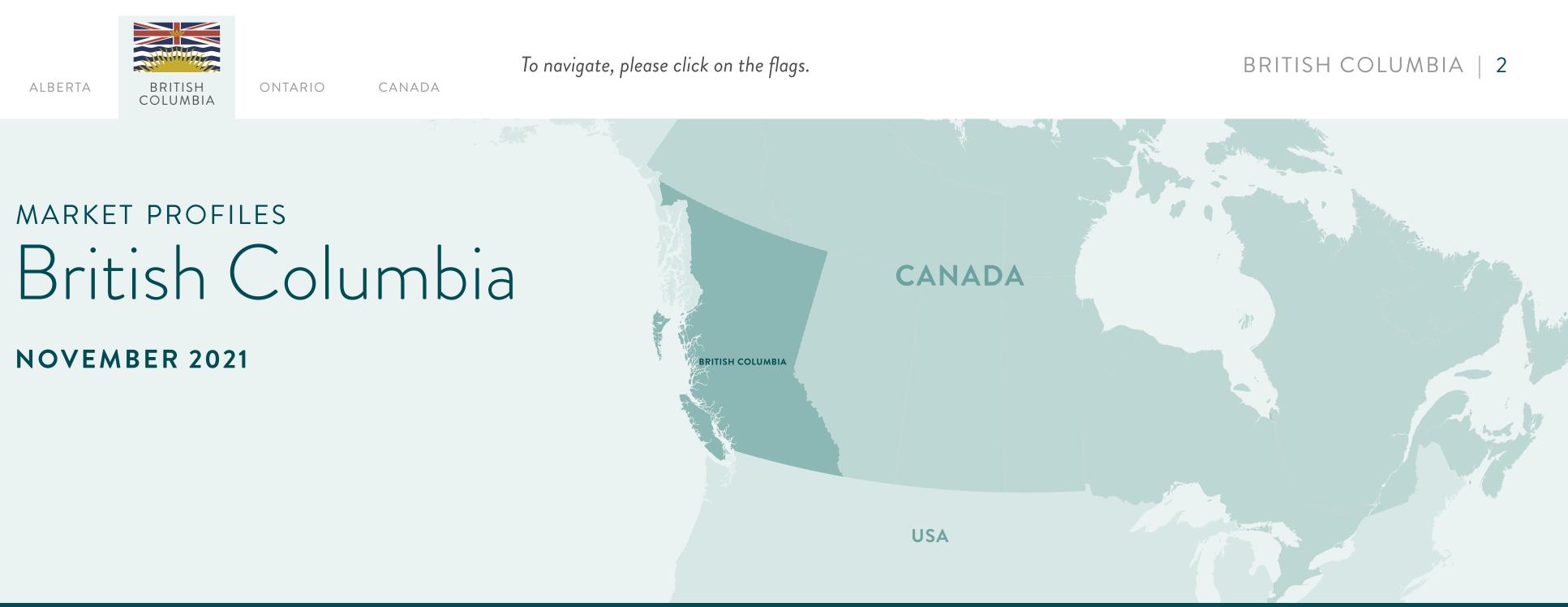
SOURCES

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- ** Ipsos Global Views on Personal Health Data and Vaccine Passports Survey (April 2021)
- ℓ Environics Analytics (2019)
- Public Health Agency Canada ‡

2019 Air Capacity[♦]



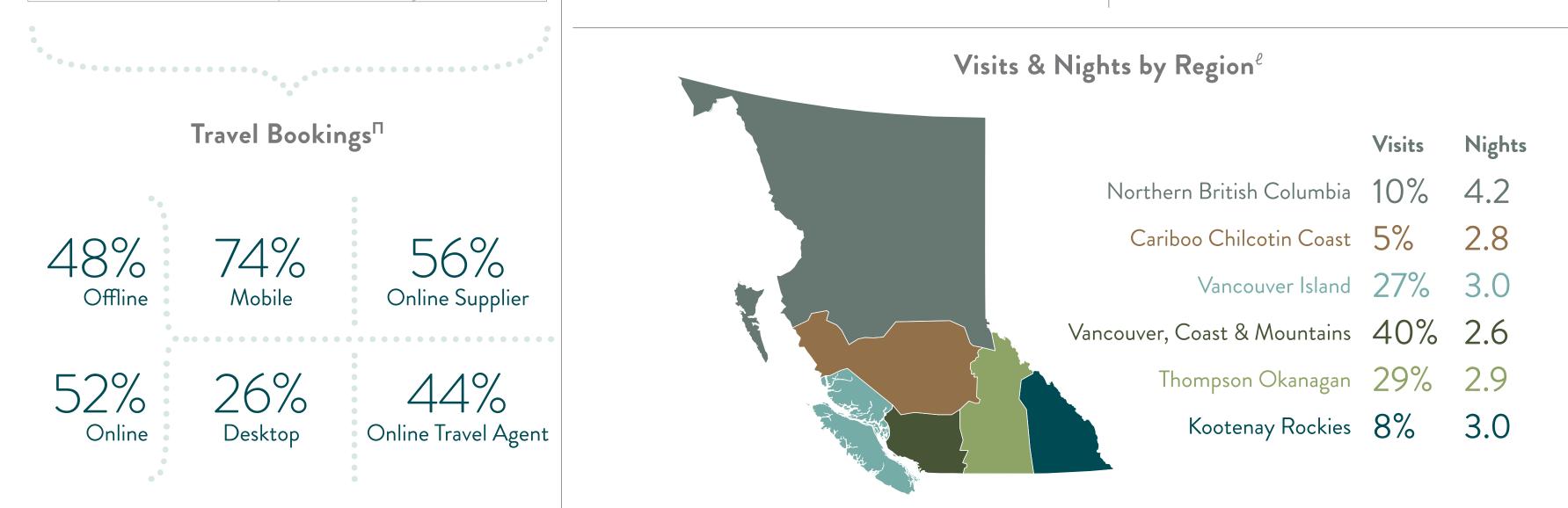




Traveller and Trip Characteristics



		20% 9% 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5		Gentle Explorers	Holiday, Visit Famil Leisure or & Friends Recreation Top 5 Visiting friends/re City/town sightse Beaches, lakes & r Shopping	, Activities [≈] latives eing		
Average Spendin	g Per Person	in BC ⁺⁺	Average Trip L	Sampling local cuisine				
¢ ′	R/1		3.4 N	lights	Trave	l Seasons ^e		
Average spending per person in BC						7% 2 nmer	20% 17% Fall Winter	
Future Travel Agent	t/Tour Opera	tor Usage ^Σ		• • • • • • • • • • • • • • • • • • •				
Researching Booking			• Accommodations [≈]		Transportation Used During Trip ⁺⁺			
Flights	6%	8%	Hotel/resort	43%	Private automobil	e	79%	
Accommodations	7%	9%	Home of family/friends	26%	Ferr	y 8%		
Accommodations	/ /o	770	Airbnb/sharing	11%	Othe	er 2%		
😂 Transportation	4%	4%	Motel/inn	11%	Commercial plan	e 1%		
	-770							
Activities	5%	4%	Campground/RV park B&B/guesthouse	8% 5%	Bu Commercial plan			





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- Σ Destination Canada's Global Tourism Watch (Pooled 2018-2020)
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ONTARIO | 1

MARKET PROFILES Ontario

BRITISH COLUMBIA

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Market Overview

2019 Market Visitation Rank ++

Market Status§

Invest



Factors Impacting/Helping Recovery

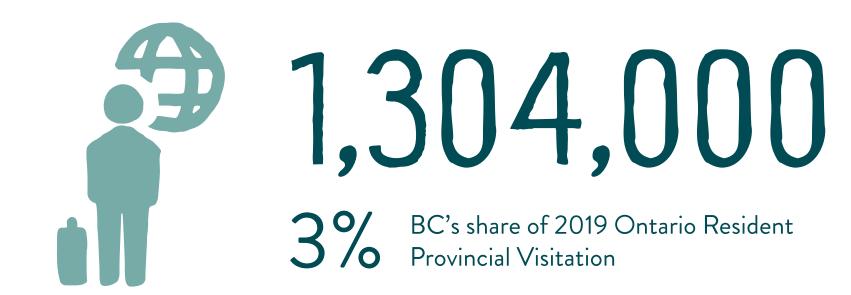
British Columbian's Comfort Welcoming Interprovincial Visitors[¶]



Of BC residents are comfortable welcoming visitors from other parts of Canada to their community (BC)

BC Past Performance

2019 Reported Visitation⁺⁺



Willingness to **Receive Vaccine**[#]

87%

Support for Vaccine Passports for International Travel^{**}

78%

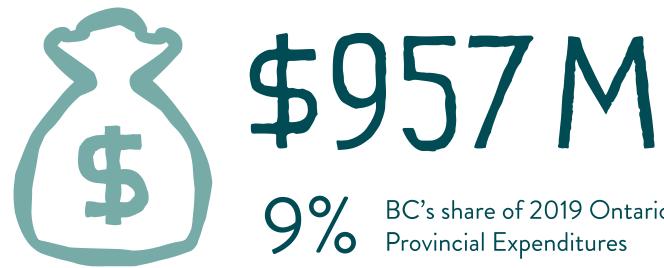
Likely to Take a Domestic Trip Outside of their Home **Province Next Year[†]**

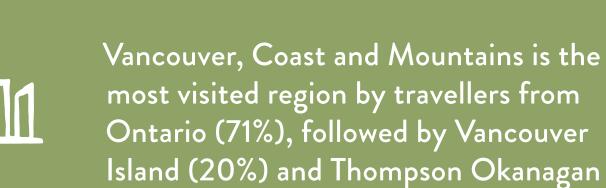
40%

Feel Safe Travelling to Other Provinces^Ω

60%

2019 Reported Expenditure⁺⁺





(16%).^ℓ

Market Highlights

BC's share of 2019 Ontario Resident



2019 BC Travel Search Queries[△]











Northern BC leads the way with most nights per region, with Ontario visitors spending an average of 5.0 nights, followed by Vancouver Island with 4.2 nights.^e

As of November 5th, 2021, 74% of all Ontarians are fully vaccinated.[‡]

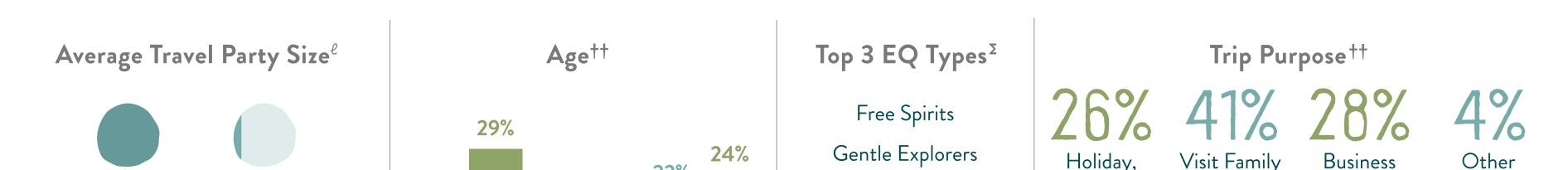
As of October 2021, 60% of Ontarians report that they feel safe travelling to other pyrovinces. $^{\Omega}$



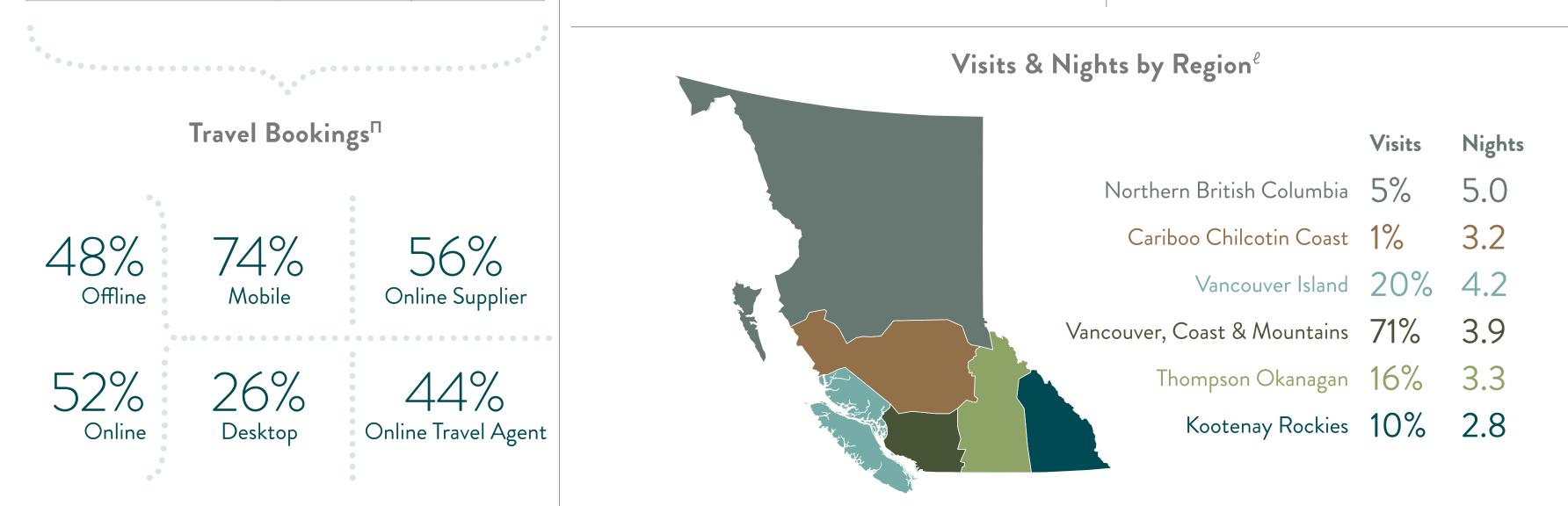
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- ℓ Environics Analytics (2019)
- Public Health Agency Canada **±**



Traveller and Trip Characteristics



		2% 2% *2~61 *5~52	22% 15% 9% $\frac{5}{5}, \frac{5}{5}, \frac{5}{$	Authentic ExperiencersIncidence of Past 5 Year Travel [≈] 445%	Holiday, Visit Family Leisure or & Friends Recreation Top 5 Sampling local cuis Hiking or walking i Recreation Natural attraction Nature parks and g	Activities ine n nature	† †	
Average Spendin	g Per Person	in BC ⁺⁺	Average Trip L	ength in BC ^e	Sand Viewing wildlife or	marine life		
¢7	721		4.6 Nights		Travel Seasons ^e			
Average spending per person in BC					27% 36 Spring Sum		18% 19% Fall Winter	
Future Travel Agent	t/Tour Opera	tor Usage [∑]	* • • • • • • • • • • • • • • • • • • •	• • • • • • • • • • • • • • • • • • • •				
	Researching	Booking	- Accommodations ^Σ		Transportation Used During Trip ⁺⁺			
Flights	5%	8%	Mid-priced hotel/motel	21%	Commercial plane		90%	
Accommodations	5%	5%	Luxury hotel/resort	12%	Othe	4%		
Accommodations	J/0	J /o	Airbnb/sharing economy Home of friends/family	10%	Private automobile	e 3%		
😂 Transportation	3%	3%	Budget hotel/motel	9%	Ferry	/ 1%		
Activities	3%	4%	B&B/guesthouse	6%	Trair	1%		
\sim	570	-770	Campground/RV park	4%	Commercial boat/cruise	e 0%		
Potential Travel	· · · · · · · · · · · · · · · · · · ·							





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

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MARKET PROFILES Canada

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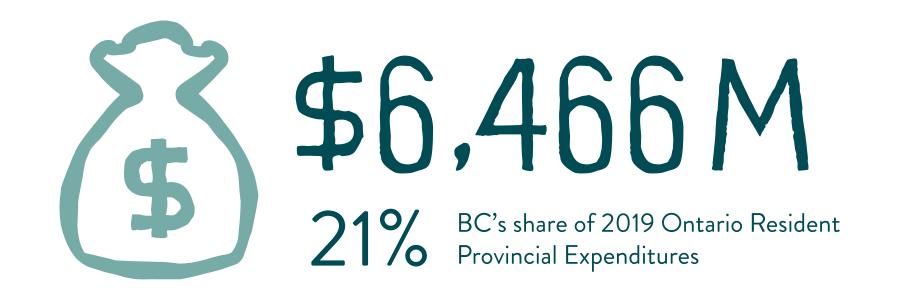


Factors Impacting/Helping Recovery

British Columbian's Comfort Welcoming Interprovincial Visitors[¶]



2019 Reported Expenditure⁺⁺







Market Highlights

2019 Air Capacity[♦] 2019 BC Travel Search Queries[△]











Canadians are fully vaccinated.**

Canadians accumulated on average \$5,800 per household in extra savings in 2020 (over \$150 billion total), resulting in an accumulation of discretionary savings that may be put towards travel in the coming future.^{ΔΔ}

In 2021, more than half (56%) of Canadian air-bookings to BC were between 5-44 days before their scheduled travel date.[♦]



SOURCES

- Destination Canada's Global Tourism Watch (2020)
- Destination BC Global Marketing Plan 2021
- Destination BC's BC Residents' Perceptions: COVID-19 Travel and Tourism T (September 2021)
- Morning Consult's Weekly Global Vaccine Tracking Survey (September 2021) #
- Π Phocuswright (2019)

- ** Ipsos Global Views on Personal Health Data and Vaccine Passports Survey (April 2021)
- ++ Destination BC Tabulations from the 2019 Visitor Travel Survey (Statistics Canada)
- ♦ ForwardKeys (2019)
- △ Google InVITE Travel Search Queries (2019 vs 2018)
- Ω Destination Canada's Canadian Resident Sentiment Survey (October 2021)
- ◊◊ Our World in Data (November 2021)

§§ Government of Canada $\Delta\Delta$ Bank of Canada (March 2021)

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MARKET PROFILES Canada

NOVEMBER 2021

Traveller and Trip Characteristics

Average Travel Party Size⁺⁺





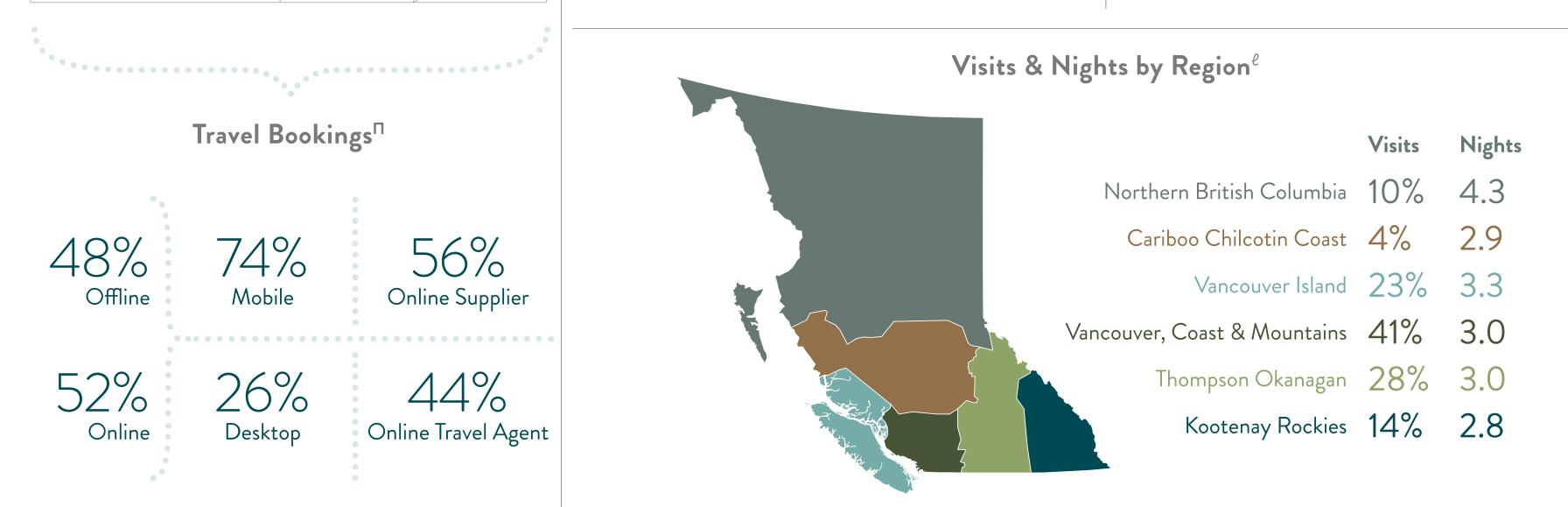
Top 3 EQ Types[∑]

Free Spirits Gentle Explorers Trip Purpose⁺⁺





		229 8%		Gentle Explorers Authentic Experiencers Incidence of Past 5 Year Travel [≈] 419/6	Leisure or & Recreation	Friends ['] Top 5 Activi local cuisine walking in natu		Other
Average Spending	g Per Person	in BC ⁺⁺	Average Trip Length in BC ^e 3.7 Nights		Road trips or driving tours Travel Seasons ^e			
Average spending per person in BC				24% Spring	36% Summer	19% Fall	20% Winter	
Future Travel Agent/Tour Operator Usage [∑] Researching Booking			Accommodations ⁵		Transportation Used During Trip ^{††}			
Flights	4%	6%	Mid-priced hotel/motel	21%	Private au	tomobile	68%	/ >
Accommodations	4%	4%	Budget hotel/motel Luxury hotel/resort	10% 9%	Commerc	· ·	19% 6%	
😂 Transportation	2%	2%	Airbnb/sharing economy Home of friends/family	9% 9%		Other	5%	
X Activities	3%	3%	, B&B/guesthouse	4%			1%	
Potential Travel Destinations	3%		Campground/RV park Own cottage/second home	4% 2%	Commercial bo		0% 0%	





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