



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 <sup>††</sup>

#2

Domestic Market

Market Status <sup>§</sup>

Invest

## Factors Impacting/Helping Recovery

British Columbian’s Comfort Welcoming Interprovincial Visitors <sup>¶¶</sup>

35%

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

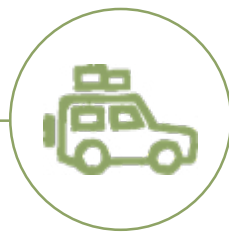


Willingness to Receive Vaccine <sup>#</sup>

87%

Support for Vaccine Passports for International Travel <sup>\*\*</sup>

78%



Likely to Take a Domestic Trip Outside of their Home Province Next Year <sup>†</sup>

40%

Feel Safe Travelling to Other Provinces <sup>Ω</sup>

69%

## BC Past Performance

2019 Reported Visitation <sup>††</sup>



3,153,000

22.0%

BC’s share of 2019 Alberta Resident Provincial Visitation

2019 Reported Expenditure <sup>††</sup>

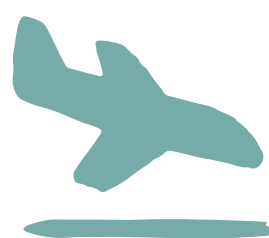


\$1,454 M

28.0%

BC’s share of 2019 Alberta Resident Provincial Expenditures

2019 Air Capacity <sup>◇</sup>



-4.3%

2019 BC Travel Search Queries <sup>Δ</sup>



+4%

## Market Highlights



The Kootenay Rockies is the most visited region by Albertan travellers (35%), followed by the Thompson Okanagan (31%), and Vancouver, Coast and Mountains (29%). <sup>ℓ</sup>



Albertan visitors spend the longest in Vancouver Island and Northern BC, with an average of 4.4 nights. <sup>ℓ</sup>



As of November 5th, 2021, 67% of all Albertans are fully vaccinated. <sup>‡</sup>



Summer is the most popular season for Albertan visitors, accounting for 44% of visits. <sup>ℓ</sup>



SOURCES

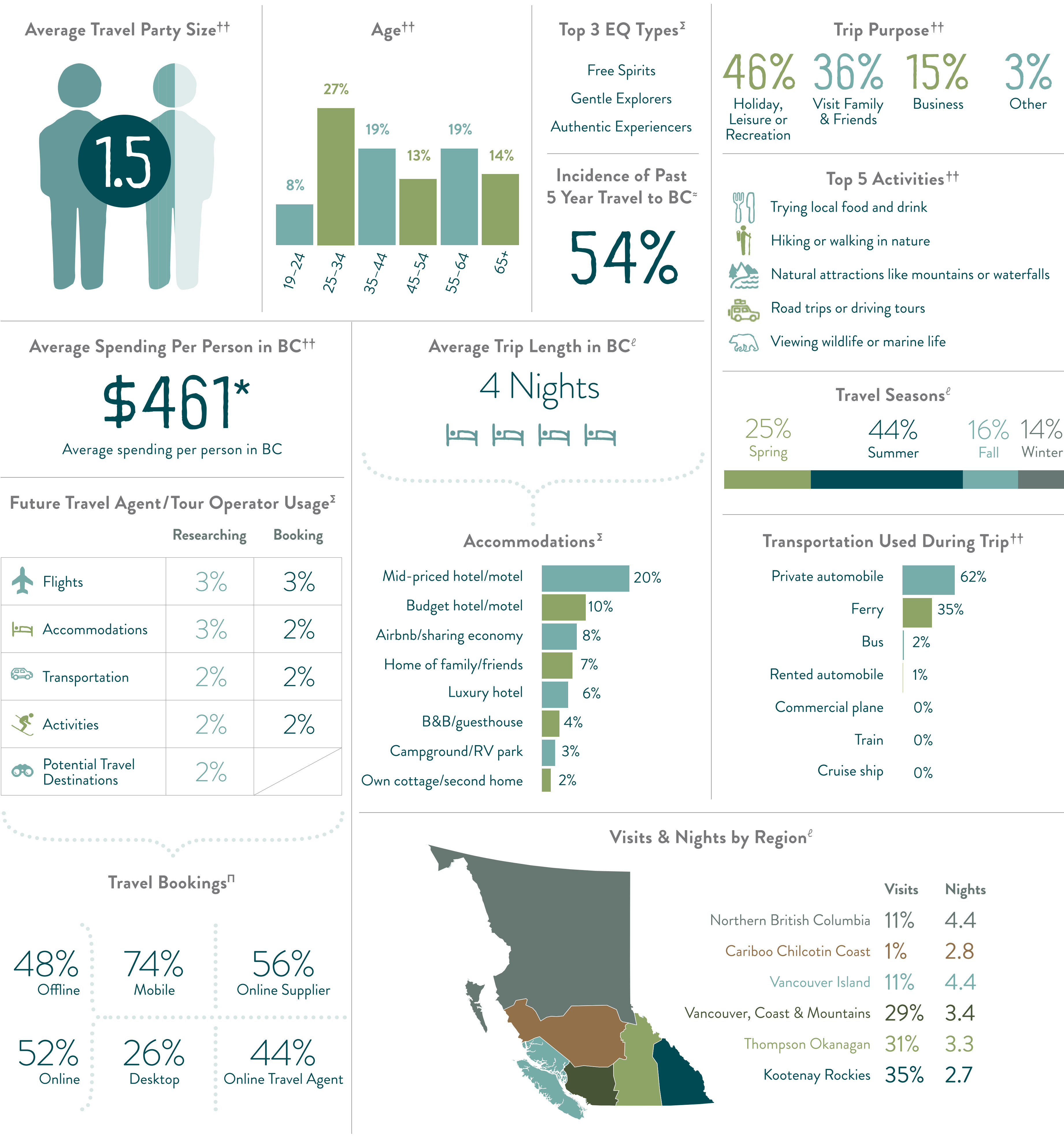


MARKET PROFILES

Alberta

NOVEMBER 2021

Traveller and Trip Characteristics



MARKET PROFILES

# British Columbia

NOVEMBER 2021

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## Market Overview

2019 Market Visitation Rank <sup>††</sup>

#1

Domestic Market

Market Status <sup>§</sup>

Invest

## Factors Impacting/Helping Recovery

British Columbian’s Comfort Welcoming Interprovincial Visitors <sup>¶¶</sup>

51%

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



Willingness to Receive Vaccine <sup>#</sup>

87%

Support for Vaccine Passports for International Travel <sup>\*\*</sup>

78%



80%

Have Overnight Travel Plans in BC Next Year <sup>¶¶</sup>

## BC Past Performance

2019 Reported Visitation <sup>††</sup>



10,510,000

80.0% BC’s share of 2019 BC Resident Provincial Visitation

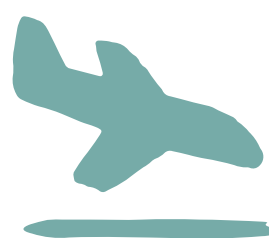
2019 Reported Expenditure <sup>††</sup>



\$3,580 M

74% BC’s share of 2019 BC Resident Provincial Expenditures

2019 Air Capacity <sup>◇</sup>



+1%

2019 BC Travel Search Queries <sup>△</sup>



+6%

## Market Highlights



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



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. <sup>ℓ</sup>



As of November 5th, 2021, 76% of all British Columbians are fully vaccinated. <sup>‡</sup>



Vancouver, Coast and Mountains is the most visited region by British Columbians (40%), followed by Thompson Okanagan (29%) and Vancouver Island (27%). <sup>ℓ</sup>



DESTINATION  
BRITISH COLUMBIA®

SOURCES

- <sup>†</sup> Destination Canada’s Global Tourism Watch (2020)
- <sup>§</sup> Destination BC Global Marketing Plan 2021
- <sup>¶¶</sup> Destination BC’s BC Residents’ Perceptions: COVID-19 Travel and Tourism (September 2021)
- <sup>#</sup> Morning Consult’s Weekly Global Vaccine Tracking Survey (September 2021)

- <sup>††</sup> Destination BC Tabulations from the 2019 Visitor Travel Survey (Statistics Canada)
- <sup>◇</sup> ForwardKeys (2019)
- <sup>△</sup> Google InVITE Travel Search Queries (2019 vs 2018)
- <sup>Ω</sup> Destination Canada’s Canadian Resident Sentiment Survey (October 2021)
- <sup>\*\*</sup> Ipsos Global Views on Personal Health Data and Vaccine Passports Survey (April 2021)

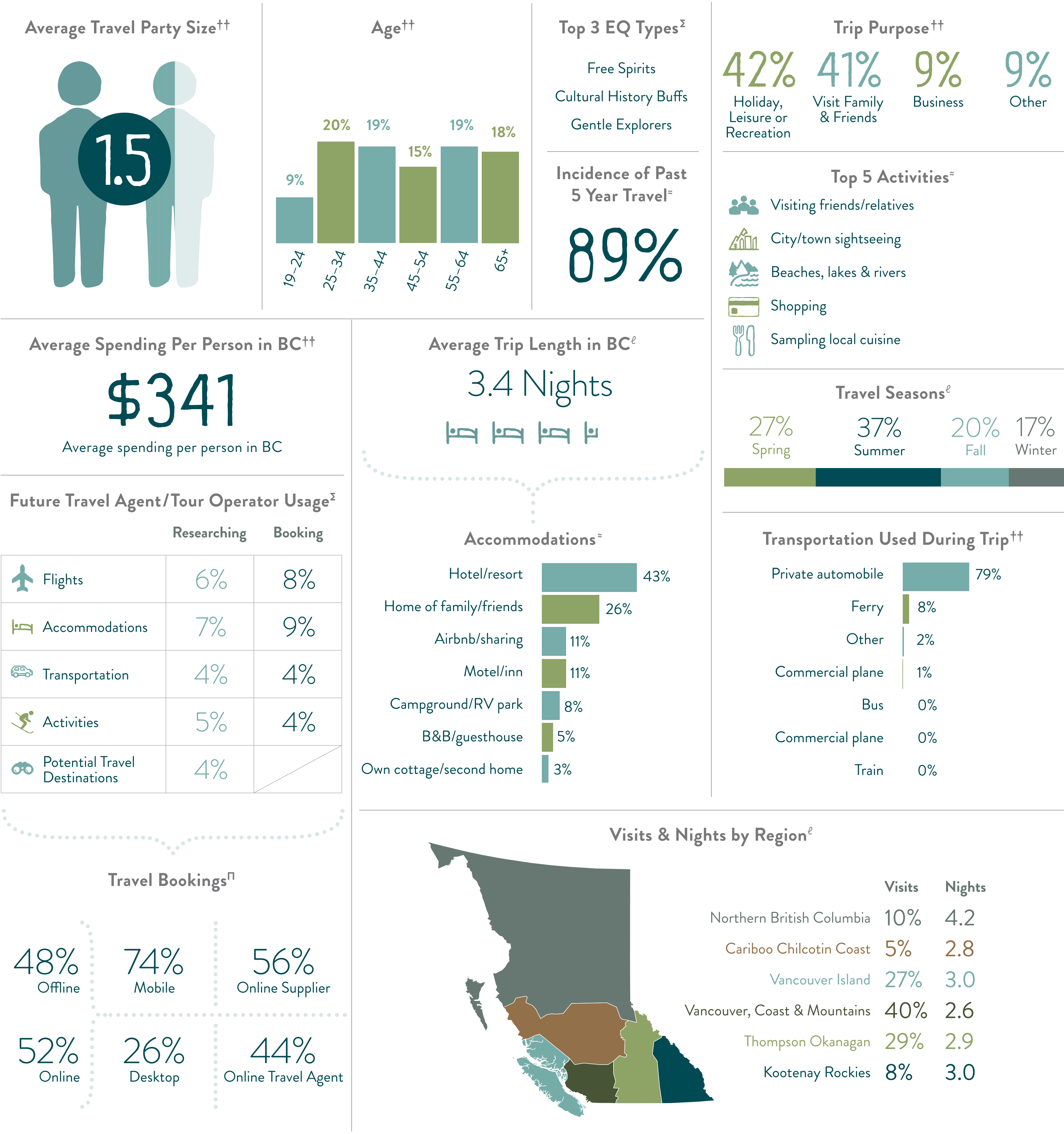
- <sup>ℓ</sup> Environics Analytics (2019)
- <sup>‡</sup> Public Health Agency Canada

MARKET PROFILES

# British Columbia

NOVEMBER 2021

## Traveller and Trip Characteristics



MARKET PROFILES

Ontario

NOVEMBER 2021

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Market Overview

2019 Market Visitation Rank <sup>††</sup>

#3

Domestic Market

Market Status <sup>§</sup>

Invest

Factors Impacting/Helping Recovery

British Columbian’s Comfort Welcoming Interprovincial Visitors <sup>¶¶</sup>

35%

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

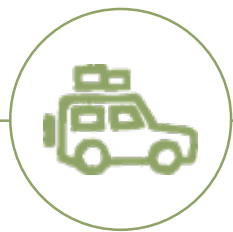


Willingness to Receive Vaccine <sup>#</sup>

87%

Support for Vaccine Passports for International Travel <sup>\*\*</sup>

78%



Likely to Take a Domestic Trip Outside of their Home Province Next Year <sup>†</sup>

40%

Feel Safe Travelling to Other Provinces <sup>Ω</sup>

60%

BC Past Performance

2019 Reported Visitation <sup>††</sup>



1,304,000

3% BC’s share of 2019 Ontario Resident Provincial Visitation

2019 Reported Expenditure <sup>††</sup>



\$957 M

9% BC’s share of 2019 Ontario Resident Provincial Expenditures

Market Highlights



Vancouver, Coast and Mountains is the most visited region by travellers from Ontario (71%), followed by Vancouver Island (20%) and Thompson Okanagan (16%). <sup>ℓ</sup>



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. <sup>ℓ</sup>

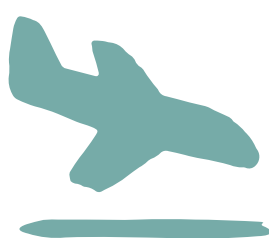


As of November 5th, 2021, 74% of all Ontarians are fully vaccinated. <sup>‡</sup>



As of October 2021, 60% of Ontarians report that they feel safe travelling to other provinces. <sup>Ω</sup>

2019 Air Capacity <sup>◇</sup>



+4.4%

2019 BC Travel Search Queries <sup>Δ</sup>



+4%



DESTINATION  
BRITISH COLUMBIA®

SOURCES

- <sup>†</sup> Destination Canada’s Global Tourism Watch (2020)
- <sup>§</sup> Destination BC Global Marketing Plan 2021
- <sup>¶¶</sup> Destination BC’s BC Residents’ Perceptions: COVID-19 Travel and Tourism (September 2021)
- <sup>#</sup> Morning Consult’s Weekly Global Vaccine Tracking Survey (September 2021)

- <sup>††</sup> Destination BC Tabulations from the 2019 Visitor Travel Survey (Statistics Canada)
- <sup>◇</sup> ForwardKeys (2019)
- <sup>Δ</sup> Google InVITE Travel Search Queries (2019 vs 2018)
- <sup>Ω</sup> Destination Canada’s Canadian Resident Sentiment Survey (October 2021)
- <sup>\*\*</sup> Ipsos Global Views on Personal Health Data and Vaccine Passports Survey (April 2021)

- <sup>ℓ</sup> Environics Analytics (2019)
- <sup>‡</sup> Public Health Agency Canada

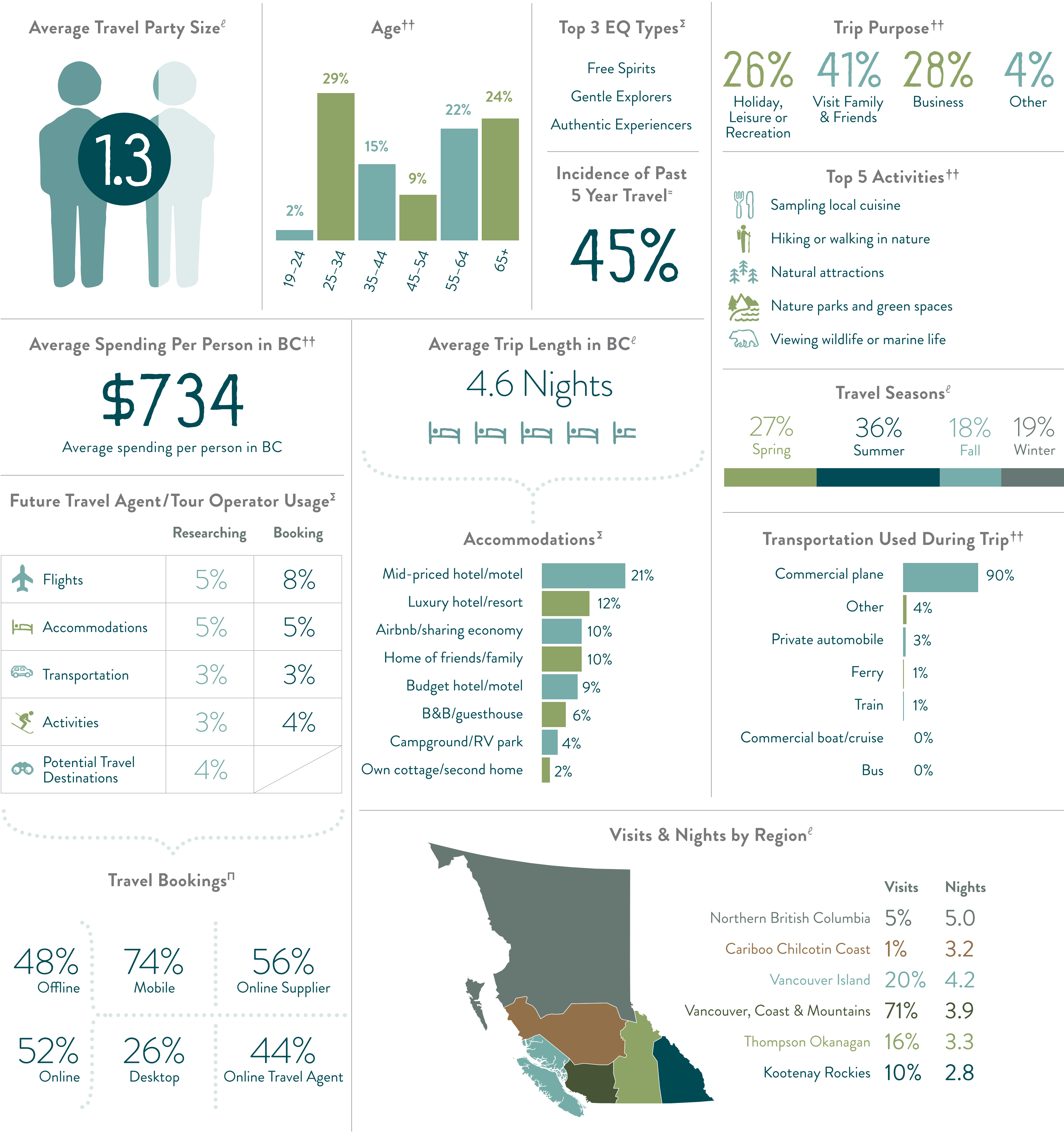
MARKET PROFILES

Ontario

NOVEMBER 2021



Traveller and Trip Characteristics



MARKET PROFILES

Canada

NOVEMBER 2021

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Market Overview

2019 Market Visitation Rank <sup>††</sup>

#1

Market Status <sup>§</sup>

Invest  
(AB, BC, ON)

Factors Impacting/Helping Recovery

British Columbian’s Comfort Welcoming Interprovincial Visitors <sup>¶¶</sup>

35%

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

Willingness to Receive Vaccine <sup>#</sup>

87%

Support for Vaccine Passports for International Travel <sup>\*\*</sup>

78%

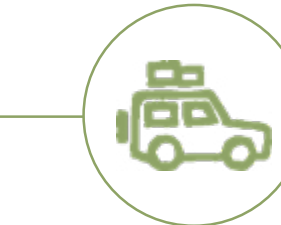
BC Past Performance

2019 Reported Visitation <sup>††</sup>



15,663,000

15% BC’s share of 2019 Canadian Resident Provincial Visitation



40%

Have Overnight Travel Plans in BC Next Year <sup>¶¶</sup>

2019 Reported Expenditure <sup>††</sup>



\$6,466 M

21% BC’s share of 2019 Ontario Resident Provincial Expenditures

Market Highlights



While strict COVID-19 testing is currently required upon arrival into Canada, fully vaccinated international travellers do not need to quarantine. <sup>§§</sup>



As of November 5th, 2021, 74% of all Canadians are fully vaccinated. <sup>◇◇</sup>

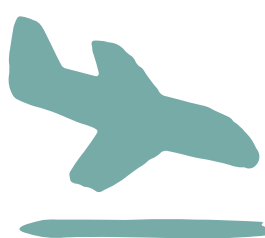


Canadians accumulated on average \$5,800 per household in extra savings in 2020 (over \$150 billion total), resulting in an accumulation of discretionary savings that may be put towards travel in the coming future. <sup>ΔΔ</sup>



In 2021, more than half (56%) of Canadian air-bookings to BC were between 5–44 days before their scheduled travel date. <sup>◇</sup>

2019 Air Capacity <sup>◇</sup>



+0%

2019 BC Travel Search Queries <sup>Δ</sup>



+4%

SOURCES

- <sup>†</sup> Destination Canada’s Global Tourism Watch (2020)
- <sup>§</sup> Destination BC Global Marketing Plan 2021
- <sup>¶¶</sup> Destination BC’s BC Residents’ Perceptions: COVID-19 Travel and Tourism (September 2021)
- <sup>#</sup> Morning Consult’s Weekly Global Vaccine Tracking Survey (September 2021)
- <sup>Π</sup> Phocuswright (2019)

- <sup>\*\*</sup> Ipsos Global Views on Personal Health Data and Vaccine Passports Survey (April 2021)
- <sup>††</sup> Destination BC Tabulations from the 2019 Visitor Travel Survey (Statistics Canada)
- <sup>◇</sup> ForwardKeys (2019)
- <sup>Δ</sup> Google InVITE Travel Search Queries (2019 vs 2018)
- <sup>◇</sup> Destination Canada’s Canadian Resident Sentiment Survey (October 2021)
- <sup>◇◇</sup> Our World in Data (November 2021)

- <sup>§§</sup> Government of Canada
- <sup>ΔΔ</sup> Bank of Canada (March 2021)

MARKET PROFILES

Canada

NOVEMBER 2021

Traveller and Trip Characteristics

