

2020 Global Tourism Watch Highlights Report

Alberta
November 2020

Publication date: October 2021

CANADA 
FOR GLOWING
HEARTS

Canada

 **DESTINATION
CANADA**

Moraine Lake
Alberta



STUDY OVERVIEW

Study Overview:

As a result of the COVID-19 pandemic in 2020 and the renewed focus on domestic travel, the Canada study was conducted among the general population (excluding residents of the Northern Territories). A total of 9,059 Canadians participated.



GTW Provincial Sample Distribution:

British Columbia Residents:	1,500
Alberta Residents:	1,500
Saskatchewan Residents:	500
Manitoba Residents:	500
Ontario Residents:	2,101
Quebec Residents:	1,507
New Brunswick Residents:	400
Nova Scotia Residents:	400
Prince Edward Island Residents:	250
Newfoundland & Labrador Residents:	401

At the provincial level, respondents are split into two groups based on their travel behaviour:

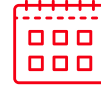
Domestic Out-of-Province Travellers: Canadian residents aged 18 years and older, who have taken a pleasure trip in Canada beyond their own province where they had stayed at least 2 nights with a minimum of 1 night in paid accommodation in the past 3 years, or plan to take such a trip in the next year. These respondents evaluated destinations outside of their province.

In-Province: Canadian residents aged 18 years and older, who evaluated destinations within their province of residence.

Context:

It is important to consider the results based in light of the COVID-19 situation at the time of data collection. In November 2020, no vaccine was approved for use and Canada was at the start of its 2nd wave of COVID-19. Many provinces tightened restrictions in November in an effort to contain the pandemic. Non-essential travel within Canada and beyond the country was discouraged. The Canada/US border had been closed since March 2020.

For additional context around the current COVID-19 situation in Canada, please refer to Destination Canada's [COVID-19 Research page](#), which includes information on resident sentiment, travel related measures, impact and recovery, and forecasting.



Timing of Fieldwork: Nov 2020

This report contains a summary of key metrics about residents of Alberta.

Results are presented for three main groups:

- Total residents: Results among the total sample of Alberta residents (n=1,500)
- Out-of-province: Results among out-of-province travellers in Alberta who evaluated destinations outside of Alberta (n=750)
- In-province: Results among residents of Alberta who evaluated destinations within Alberta (n=750)

Charts are colour coded to show the results among each group:

Legend:

Total Residents

Out-of-Province Travellers

Residents evaluating in-province destinations

KEY HIGHLIGHTS

Key Highlights – Alberta Market

Insight	Implication
<p>There is pent up demand for travel, but Albertans also have concerns, primarily related to health and safety in a potential destination.</p>	<p><i>Illustrating that health and safety measures are in place and a destination is safe to visit are key messages that need to be communicated to encourage Albertans to travel within the province and to other Canadian provinces and territories in 2021.</i></p>
<p>Albertans are the most likely of all Canadian residents to report that they feel safe travelling now; however, it is still a relatively small group that feels that way. This group is more likely to have travelled since the start of the pandemic and is more likely to be comfortable flying domestically. The biggest barrier to travel within Canada for those who feel safe travelling is cost, and Albertans tend to be more cost-conscious than other Canadian residents.</p>	<p><i>Travel deals and illustrating the value a vacation within Alberta or to other Canadian provinces and territories may motivate this group of Albertans to travel more in 2021.</i></p>
<p>Leisure trips and visiting family and friends will drive Albertans' travel in 2021. There is little appetite for business or conference-related travel in 2021.</p>	<p><i>Low interest in business travel is a challenge that the business events sector will need to address going forward.</i></p>
<p>Albertans are much more likely to travel outside of their province relative to other Canadians, with nearly half reporting that they are likely to do so in the next year – significantly above the national average.</p>	<p><i>Given the high interest in out-of-province travel, the Alberta market represents a good immediate opportunity for destinations and operators outside of the province.</i></p>
<p>While more willing to travel out-of-province, Albertans are still following a Canada-wide trend of staying closer to home: British Columbia stands out as the top province under consideration, and four of the top five destinations mentioned among out-of-province travellers are in BC.</p>	<p><i>British Columbia has the most to gain from the Albertan market.</i></p>
<p>There are mixed opinions on city travel. For out-of-province travel, there is considerable interest in visiting major cities (e.g. Vancouver, Victoria, Toronto) but also smaller destinations such as the Thompson Okanagan and Kootenay Rockies regions. In contrast, for travel within Alberta, there is a greater appetite for trips to destinations outside of the major cities.</p>	<p><i>There is an opportunity for both cities and smaller destinations outside of Alberta to attract visitors from Alberta, while more rural areas, including national parks, within Alberta may find a greater opportunity with the resident market.</i></p>
<p>Trips to familiar destinations with limited interactions are favoured. Albertans are most interested in taking trips where activities and social interactions are limited. They are more open to re-visiting familiar destinations than travelling to new destinations.</p>	<p><i>There is a greater opportunity to resonate with potential Alberta travellers by highlighting uncrowded yet familiar destinations.</i></p>
<p>Albertans are very outdoors focused, with COVID-19 likely enhancing the popularity of outdoor activities such as hiking/walking in nature, natural attractions, and nature parks. Visiting breweries and wineries are more popular among Albertans than among other Canadians.</p>	<p><i>Communicating the availability of popular outdoor activities, whether within Alberta or in other provinces or territories, will capture the attention of potential travellers in Alberta.</i></p>

KEY HIGHLIGHTS

Key Highlights – Alberta Market

Insight	Implication
<p>Younger Albertans (under 35 years) are eager to resume travelling. They are less concerned about health and safety and have the strongest intent to travel both within and outside of Alberta. This younger audience in Alberta is also the most open to visiting larger Canadian cities such as Vancouver, Toronto, and Montréal.</p>	<p><i>Younger Albertans (under 35 years) represent the best immediate opportunity for Alberta-based operators as well as those in other provinces and territories, and in particular for larger cities.</i></p>
<p>Older Albertans (55+ years) are more hesitant to travel in the near future. Much of their hesitancy is related to health and safety concerns.</p>	<p><i>Clearly illustrating in communications that health and safety measures are being followed and that a destination is safe is particularly important for attracting older Albertans (55+ years).</i></p>

DOMESTIC TRAVEL INTENT AND CONSIDERATION

Key Insights:

- As seen with residents across Canada, the COVID-19 pandemic has severely impacted Albertans' plans to travel in 2021.
- Relative to the Canadian average, the outlook for in-province travel in Alberta is slightly above average, while the outlook for out-of-province domestic travel is significantly above average.
- With Alberta residents following a Canada-wide trend for staying closer to home, **British Columbia is the province that stands to benefit the most from the Alberta outbound market.**

Vacation Outlook – Next Year vs. Past Year (% spending more time minus % spending less time)

Staying at home	+36
Travelling within Alberta	-2
Travelling outside of Alberta, but within Canada	-27
Travelling outside of Canada	-57



Total Residents (n=1500)

Likelihood of Travelling within Canada – Next Year

Out-of-Province Travel

Immediate Potential
(Any trip length within Canada
outside of own province)



Out-of-Province Travellers (n=750)

Market Size Potential
(Out-of-Province Travellers
considering visiting each region)



British Columbia	1.69 M
Saskatchewan/Manitoba	617,500
Ontario	705,500
Quebec	392,500
Atlantic	1.08 M
North	397,000

In-Province Travel

Immediate Potential
(Any trip length within province)



Residents evaluating in-province destinations (n=750)

DOMESTIC TRAVEL INTENT AND CONSIDERATION (CONT.)

Key Insights:

- BC is the province most likely to be under consideration for a visit in the next year. Vancouver and the Thompson Okanagan region are at the top of the destination list, though other destinations in BC are also popular. **BC stands to benefit the most from the Alberta outbound market.**
- Destinations other than major cities, including national parks, are most popular for travel within Alberta. **This suggests there is an opportunity for these less populous destinations to capitalize on the in-province market.**

Destinations Seriously Considering – Next Year

Out-of-Province Travel – Top 3 Provinces

71%	30%	18%
British Columbia	Ontario	Saskatchewan

Top 5 Destinations

39%	39%	34%	32%	22%
Vancouver	Thompson Okanagan	Victoria	Kootenay Rockies	Toronto

Out-of-Province Travellers (n=750)

In-Province Travel – Top 5 Destinations

Banff & Lake Louise	53%
Alberta Rockies outside of Banff, Lake Louise and Jasper	44%
Jasper	42%
Edmonton	24%
Calgary	24%

Residents evaluating in-province destinations (n=750)

Most Appealing Destinations / Destination Knowledge

Out-of-Province Travel – Top 3 Appealing Provinces

	British Columbia	Ontario	Saskatchewan
Most Appealing	57%	12%	6%
Knowledge (excellent/very good)	62%	36%	23%

Top 3 Appealing Destinations

	Thompson Okanagan	Vancouver	Victoria
Most Appealing	19%	18%	14%
Knowledge (excellent/very good)	50%	43%	49%

Out-of-Province Travellers planning to travel within Canada in next year (n=663/n=653)

In-Province Travel – Top 3 Appealing Destinations

	Most Appealing	Knowledge (excellent/very good)
Banff & Lake Louise	38%	46%
Alberta Rockies outside of Banff, Lake Louise and Jasper	28%	33%
Jasper	20%	36%



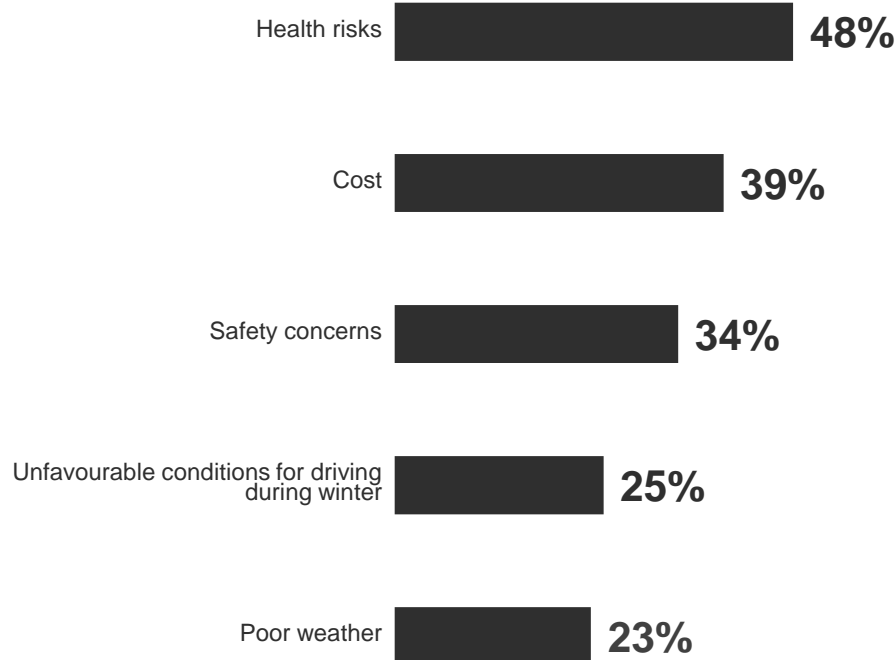
Residents evaluating in-province destinations planning to travel within Canada in next year (n=584)

BARRIERS TO TRAVEL WITHIN CANADA

Key Insights:

- Health risks are the top barrier to travel within Canada. Concerns about health risks increase with age and may be linked to the availability of a vaccine for COVID-19 (as this study was fielded in November 2020). As more Albertans are vaccinated, health risks may decline as a barrier to travel; meanwhile **demonstrating that health and safety measures are in place and a destination is safe to visit are key messages that need to be communicated to encourage Albertans to travel within the province and to other Canadian provinces and territories.**
- 20% of Albertans feel safe travelling now, which is significantly higher than the national average. This small group is more likely to have travelled during the pandemic and more likely to say they are comfortable flying domestically. The top barrier for this group is cost, so **travel deals could motivate those already comfortable travelling to take more trips.**
- Cost is the second most important barrier overall for Albertans, and is a significantly higher barrier in Alberta compared to the national average. **Travel deals are likely to resonate well with**

Top 5 Barriers to Travel



Total Residents (n=1500)



COVID-19 CONSIDERATIONS

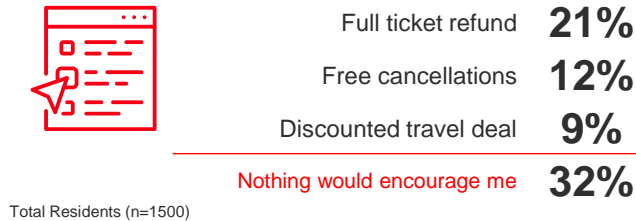
Key Insights:

- There is pent up demand for travel with nearly two-thirds of Albertans indicating they are eager to travel again.
- Albertans are most interested in taking trips where activities and social interactions are limited, and with more outdoor-based activities and attractions. They are more open to re-visiting familiar destinations than travelling to new destinations. ***There is a greater opportunity to resonate with potential Alberta travellers by highlighting outdoor activities at uncrowded and familiar destinations.***
- While one-third of Albertans say nothing could encourage them to book a trip in the near future, the other two-thirds are open to a variety of booking incentives. ***Flexible options and travel deals may encourage some Albertans to book sooner.***
- When choosing a destination, health and safety measures in the destination and COVID-19 case counts are the most important considerations for potential Albertan travellers. ***To reassure potential visitors, it is important to communicate that health and safety protocols are in place.***

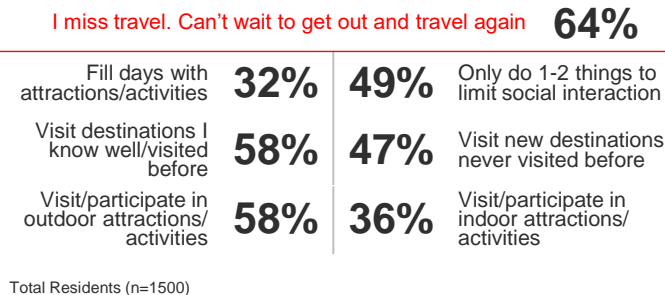
Transportation Mode Likely to Use – Top 3



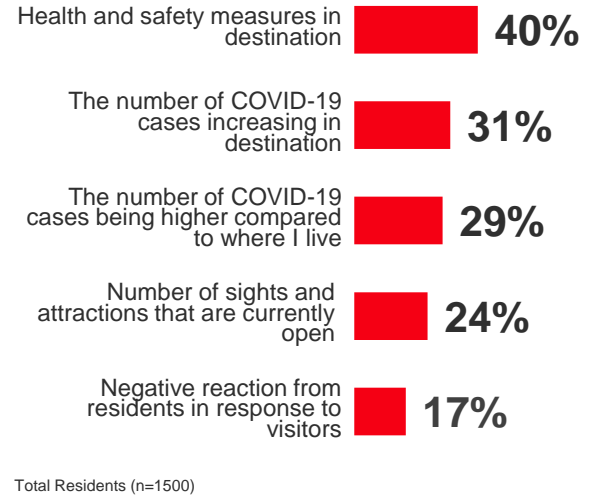
Incentives to Book in the Near Future – Top 3



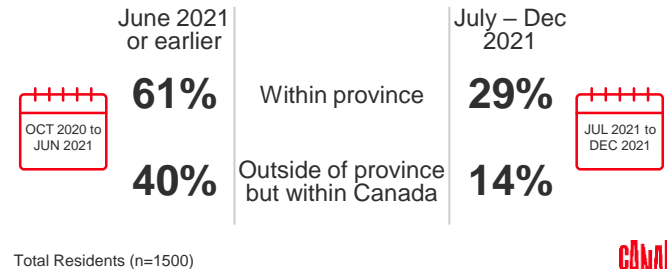
Attitudes Towards Travel – Top2Box



COVID Specific Factors to Consider when Selecting Destination – Top 5



First Time Comfortable Travelling



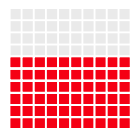
KEY CHARACTERISTICS OF NEXT CANADA TRIP

Key Insights:

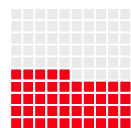
- Travelling for vacation purposes and visiting family and friends will drive travel in 2021. There is little interest in business or conference-related travel in 2021, **which is a challenge that the business events sector will need to address going forward.**
- In the next year, domestic travel parties will largely be made up of immediate family. **Couples and families represent the greatest potential markets for travel within and outside of Alberta.**

Trip Purpose

Out-of-Province Travel



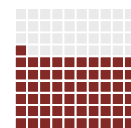
Vacation
60%



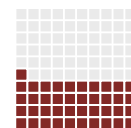
Visit family
and friends
46%

Out-of-Province Travellers answering (n=682)

In-Province Travel



Vacation
61%



Visit family
and friends
41%

Residents evaluating in-province destinations answering (n=606)

Trip Length – Top 1 / Travel Party – Top 3 / Accommodation – Top 3

Out-of-Province Travel

43%

4-6 nights



Spouse or
partner

65% → **39%**

Would travel
with spouse/
partner only

Child (under 18
years old)

21%

Alone/solo

14%



43%

Mid-priced hotel / motel.

32%

Home of friends
or relatives.

27%

Rented house,
apartment or
condominium.

Out-of-Province Travellers answering (n=682)

In-Province Travel

64%

2-3 nights



Spouse or
partner

61% → **34%**

Would travel
with spouse/
partner only

Child (under 18
years old)

21%

Alone/solo

17%



46%

Mid-priced hotel / motel.

32%

Home of friends
or relatives.

26%

Budget hotel /
motel.

Residents evaluating in-province destinations answering (n=606)

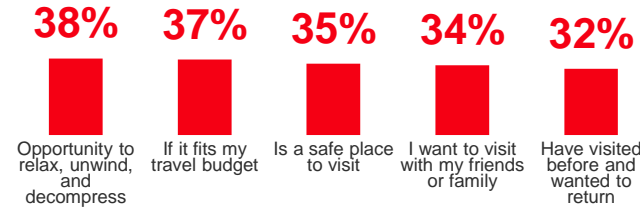
KEY CHARACTERISTICS OF NEXT CANADA TRIP (CONT.)

Key Insights:

- Relaxation opportunities, budgetary concerns, and destination safety are the top factors Albertans consider when choosing a destination. **Promoting affordable trip itineraries focused on relaxation may resonate with Albertans.**
- Albertans are particularly drawn to outdoor activities and natural attractions, both as a vacation activity and to anchor a trip around. Trying local food and drink is also a top draw for Albertans, and out-of-province travellers express stronger interest in breweries or wineries relative to residents of most other provinces. **Alberta represents a good potential market for operators offering outdoor-based itineraries.**

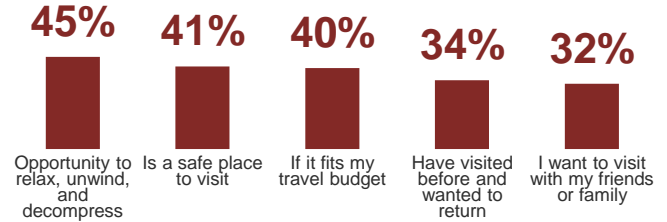
Destination Selection Factors – Top 5

Out-of-Province Travel



Out-of-Province Travellers answering (n=682)

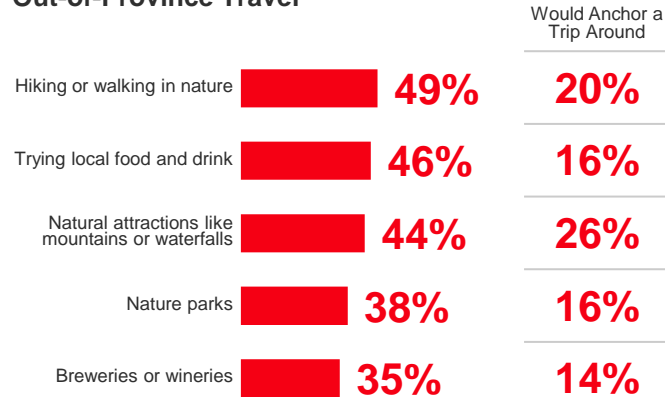
In-Province Travel



Residents evaluating in-province destinations answering (n=606)

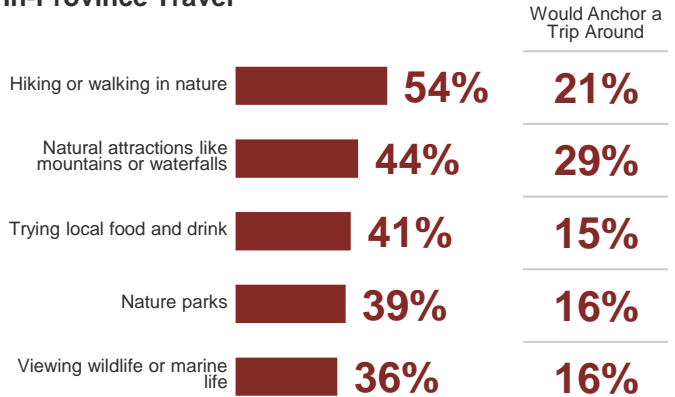
Vacation Activities – Top 5

Out-of-Province Travel



Out-of-Province Travellers answering (n=682/n=726)

In-Province Travel



Residents evaluating in-province destinations answering (n=606/n=701)

BOOKING

Key Insights:

- There is a role for travel agents supporting domestic travel in the Alberta market, especially for travel outside of the province.
- When deciding to work with a travel agent for any part of the trip planning process, Albertans are typically looking for expert destination knowledge, a good deal, or to reduce the hassle of booking. **The greatest opportunity for travel agents to engage with potential travellers in Alberta is by highlighting those offerings at the booking stage.**

Accommodation Booking – Top 3

Out-of-Province Travel



Out-of-Province Travellers answering (n=682)

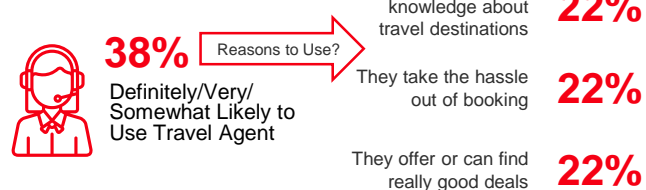
In-Province Travel



Residents evaluating in-province destinations answering (n=606)

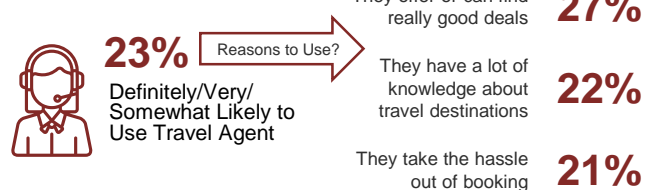
Likelihood to Use Travel Agents/Reasons to Use Agent – Top 3

Out-of-Province Travel



Out-of-Province Travellers answering (n=682)
Out-of-Province Travellers likely to use agent (n=329)

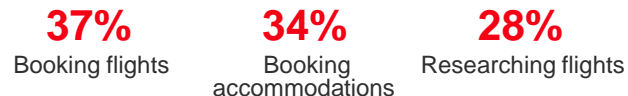
In-Province Travel



Residents evaluating in-province destinations answering (n=606)
Residents evaluating in-province destinations likely to use agent (n=165)

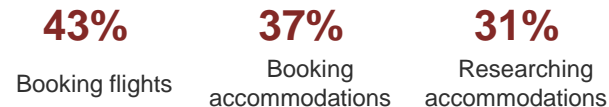
Travel Agent Tasks – Top 3

Out-of-Province Travel



Out-of-Province Travellers likely to use agent (n=267)

In-Province Travel



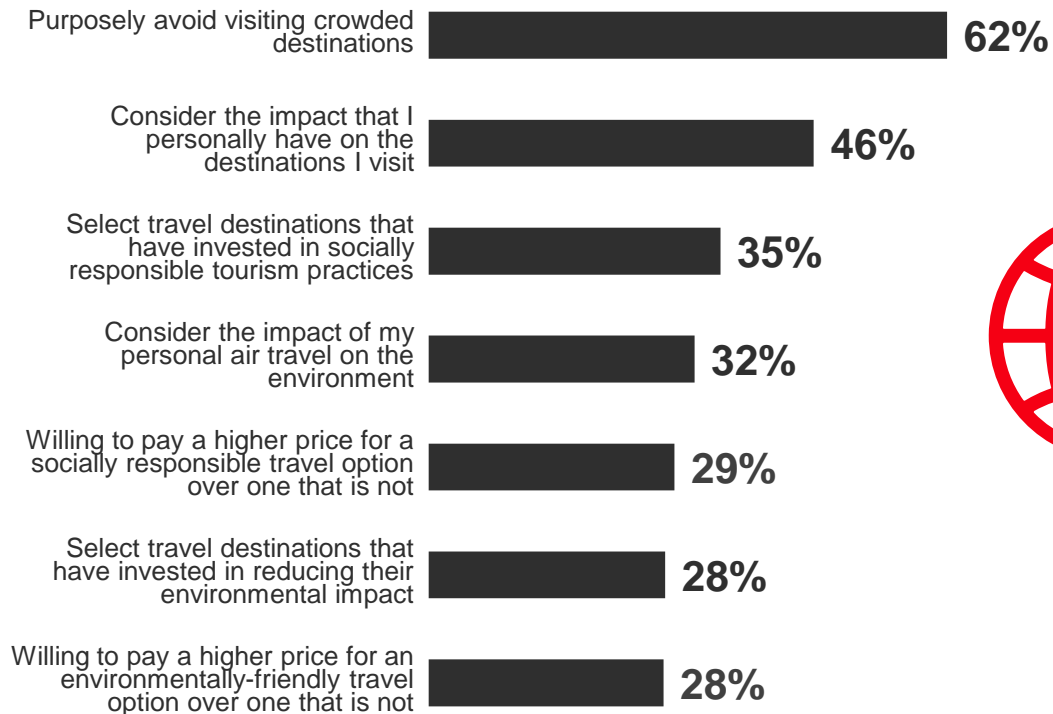
Residents evaluating in-province destinations likely to use agent (n=140)

SUSTAINABLE TRAVEL

Key Insights:

- Albertans are intentionally seeking out less crowded destinations, which may be related to concerns about COVID-19.
- At least a quarter of Albertans say they consider various aspects of sustainability when selecting travel destinations, and they may be willing to pay for more responsible options. However, only a handful mention the availability of eco-friendly travel activities as a top factor influencing their destination choice, whether for out-of-province (5%) or in-province (6%) trips. ***This suggests that while sustainability is a consideration for potential Albertan travellers, there are other factors that play a greater deciding role in destination selection.***

Attitudes About Sustainable Travel



Total Residents (n=1500)

DOMESTIC TRAVEL INTENT AND CONSIDERATION

Vacation Outlook – Next Year vs. Past Year

S2. How do you plan to spend your vacation time in the next 12 months compared to the last 12 months? Will you spend your vacation time ...

Likelihood of Traveling Within Canada – Next Year

MP6. Realistically, how likely are you to take a vacation trip outside of your own province, but within Canada in the next year?

Market Potential – Calculated value: Total out of province travellers (S3, S5) seriously considering visiting a province (BVC1a)

Destinations Seriously Considering – Next Year

BVC1a. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year? (Select all that apply)

BVC1b. You may have already mentioned this before, but which destinations would you seriously consider visiting in the next year? (Select all that apply)

Most Appealing Destinations – Top 3 / Destination Knowledge

MP8a. Earlier, you mentioned you would seriously consider visiting the following provinces in the next year. Which place most appeals to you? (Select one)

MP8b. Earlier, you mentioned you would seriously consider visiting the following destinations in the next year. Which place most appeals to you? (Select one)

MP3. How would you rate your level of knowledge of vacation opportunities in each of the following destinations? (Select one for each)

BARRIERS TO TRAVEL WITHIN CANADA

Top 5 Barriers to Travel

MP9. Which of the following reasons might prevent you from travelling within Canada? (Select all that apply)

COVID-19 CONSIDERATIONS

Transportation Mode Likely to Use – Top 3

COV16. As government restrictions related to COVID-19 are relaxed, how likely are you to use the following modes of transportation?

Incentives to Book in the Near Future – Top 3

COV17. Which one of the following offerings would most encourage you to make a travel booking in the near future? (Select one)

Attitudes Toward Travel – Top2Box

COV13. Thinking of your next vacation, as government restrictions related to COVID-19 are relaxed, how much do you agree or disagree with the following statements?

Factors to Consider when Selecting Destination (COVID Specific) – Top 5

NEWQ4. When thinking about taking a vacation trip to [within province / outside your own province, but within Canada], which of the following are the most important considerations in selecting your travel destination? (Select up to 3 options)

First Time Comfortable Travelling

COV5. Given the current situation with COVID-19, when is the first month that you would feel comfortable travelling to the following destinations?

KEY CHARACTERISTICS OF NEXT CANADA TRIP

Trip Purpose

FT2. Thinking of your next trip to [within province / outside your own province, but within Canada], what would be the main purpose of this trip?

Trip Length – Top 1 / Travel Party – Top 3 / Accommodation – Top 3

FT4. Thinking of your next trip to [within province / outside your own province, but within Canada], how many nights do you think you would spend?

FT5. Thinking of your next trip to [within province / outside your own province, but within Canada], who would you travel with? (Select all that apply)

FT10. Thinking of your next trip to [within province / outside your own province, but within Canada], which types of accommodation would you consider staying at?

Destination Selection Factors – Top 5

FT3. Thinking of your next trip to [within province / outside your own province, but within Canada], which of the following would factor into your choice to travel to that destination? (Select all that apply)

Vacation Activities – Top 5

FT11. Thinking of your next trip to [within province / outside your own province, but within Canada], what activities would you be interested in participating in? (Select all that apply)

MP12. Among these activities are there any that are important enough that you would base an entire trip around that activity? (Select all that apply)

BOOKING

Accommodation Booking – Top 3

FT8. Thinking of your next trip to [within province / outside your own province, but within Canada], which methods would you be likely to use to book your accommodation? (Select all that apply)

Likelihood to Use Travel Agents / Travel Agent Tasks – Top 3

FT6. Travel agents offer personalized service to help individuals, groups, and business travellers plan and organize their travel schedules, from purchasing tour packages to booking flights and hotels. Examples of travel agents include Flight Centre or Transat Travel, they do not include online booking engines like Expedia or Travelocity. Thinking of your next trip to [within province / outside your own province, but within Canada], how likely are you to use a travel agent or tour operator to help you research or book your trip?

NEWQ2. Which of the following reasons is the most important consideration for using a travel agent to book your next vacation trip?

Travel Agent Tasks – Top 3

FT7. Which of the following would you have a travel agent or tour operator help you with? (Select all that apply)

SUSTAINABLE TRAVEL

Agreement with Statements – Top2Box (Strongly/Somewhat Agree)

PC31. Sustainable travel refers to “travel that minimizes any negative impacts on the destination’s environment, economy and society, while making positive contributions to the local people and conserving the destination’s natural and cultural heritage”. Please indicate your level of agreement with each of the following statements ...