



Spending by domestic travellers recovered surpassing 2019 levels in 2022, while visitation surpassed 2019 levels in 2023.

Market Forecast Insights

After exceeding 2019 spending levels in 2022, domestic tourism spending reached 113% of 2019 spending levels in 2023. Domestic tourists spent \$86.6 billion, 13% more than they did in 2019. The growth of domestic tourism will slow in 2024, but despite a slowdown in visits, spending will still reach \$87 billion.

- Spending by domestic travellers is projected to reach 117% of 2019 levels in 2025.
By 2030, domestic spending will reach \$111 billion, 145% of 2019 levels.
Intra-provincial travel almost recovered in 2022, reaching 98% of 2019 levels. Inter-provincial travel lagged at 92% of 2019 levels.
In 2023, Canadians shifted their travel patterns to focus more on trips to other provinces. Both inter and intra provincial trips recovered in 2023 to 103% and 104%, respectively.

Market Forecast Highlights1

Spending and visitation levels (% relative to 2019)

Table with 13 columns (2019-2030) and 2 rows (Spend, Visitation). Spend values: 100, 61, 69, 102, 113, 114, 117, 122, 127, 133, 139, 145. Visitation values: 100, 59, 74, 97, 104, 103, 105, 107, 109, 110, 112, 114. Includes a legend for percentage ranges.

Forecast Context and Assumptions1

Travel Sentiment and Covid Restrictions

- Domestic travel has been resilient in the face of pandemic restrictions and has driven Canada's travel recovery so far.
The initial recovery in domestic travel was driven by trips within traveller's own provinces.
In late 2022, the Canadian Resident Sentiment survey shows strong sentiment towards out-of-province destinations. This was reflected in a strong surge in out-of-province travel in 2023, that caused inter-provincial trips to fully recover in 2023.

Travel Conditions

- Weaker economic conditions will cause the travel recovery to slowdown in 2024.
Business travel has recovered more slowly than leisure travel.

Economy2

- A weaker economic outlook in 2024 will cause consumers to pull back spending.
GDP grew 1.1% in 2023, but will contract 0.6% in 2024.
Domestic demand will contract as higher interest rates limit the ability of households to spend, and businesses pull back on investment.

1 DC Tourism Outlook Forecast, Fall 2023
2 Oxford Economics



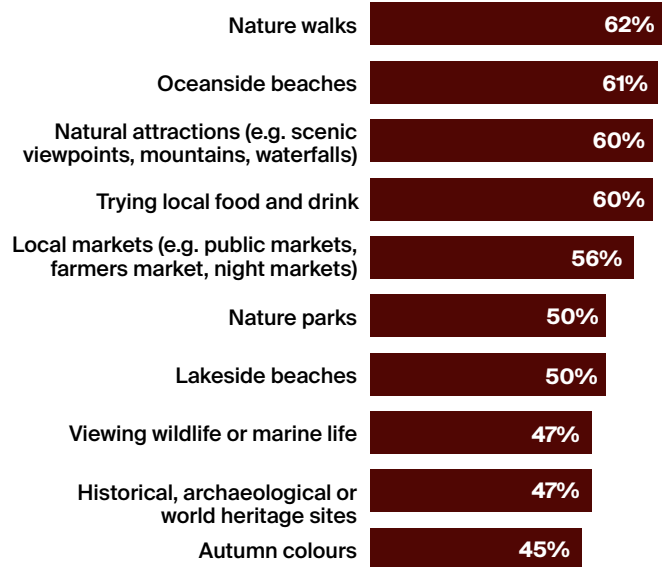
## Total Domestic Out-of-Province Travellers

Canadian residents aged 18 and older who have taken a pleasure trip in Canada beyond their own province in the past three years, or plan to take a such a trip in the next year.

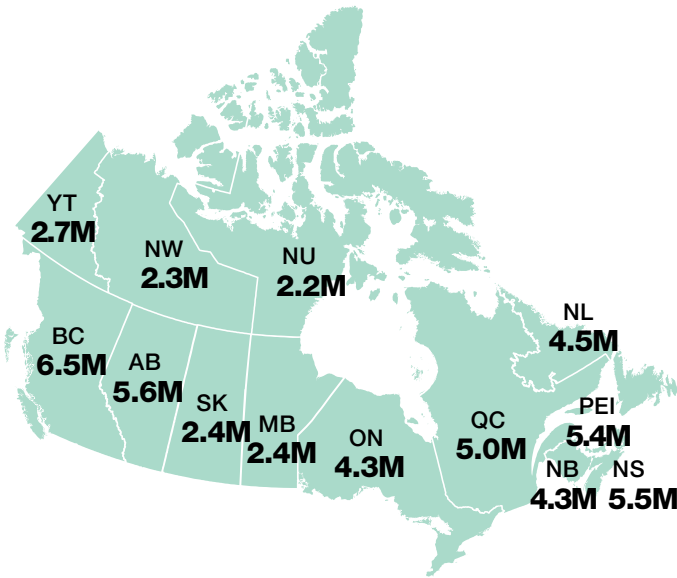
### Top 3 Most Important Sustainability Efforts

- 41%** Conservation of natural areas in my destination
- 40%** Knowing that my money is directly supporting the local community
- 40%** Knowing that the local community in my destination is open and welcoming to travellers

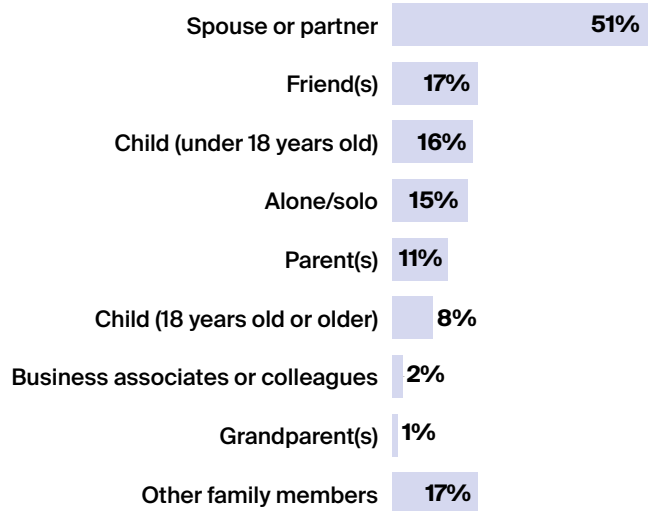
### Top Activities of Interest While on Vacation<sup>3</sup>



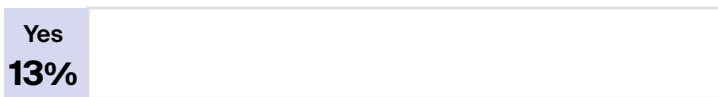
### Potential Inbound Market Size (Travel to Region in Next Year from Domestic Out-of-Province Visitors)<sup>3</sup>



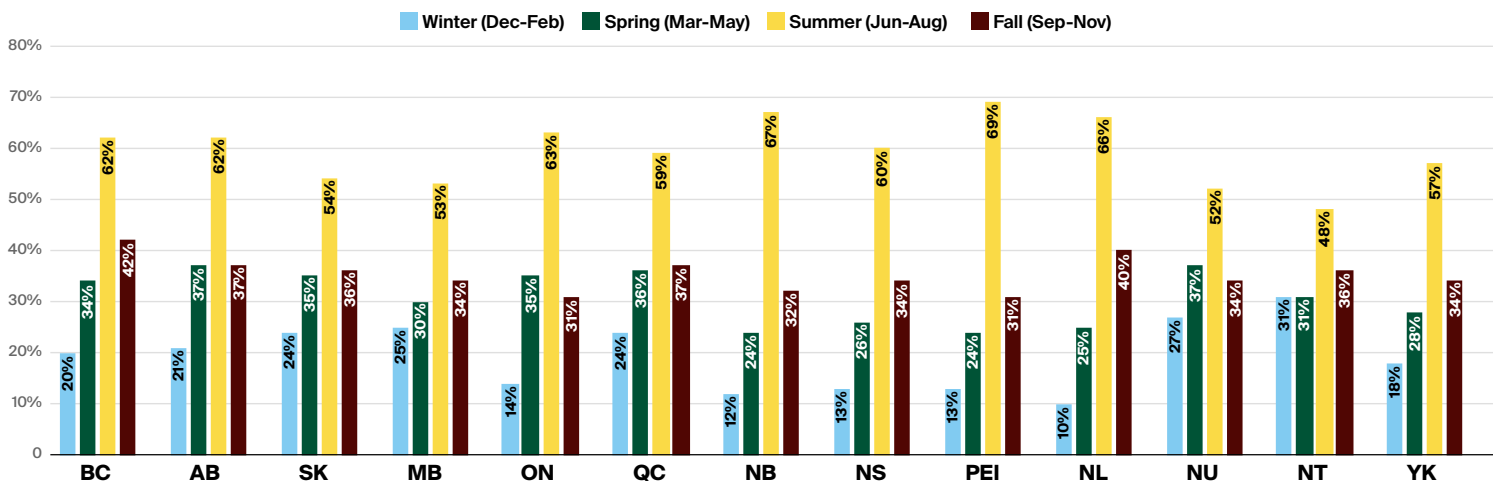
### Travel Party of Recent Trip<sup>3</sup>



### Travel Agent Usage for Most Recent Trip<sup>3</sup>



### Canada Consideration By Seasons<sup>3</sup>



### For further information, please contact:

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<sup>3</sup> Global Traveller Research Program 2023.