

2022 – 2025
**BUSINESS
PLAN**

Land Acknowledgement

What we call Alberta is the traditional and ancestral territory of many peoples, presently subject to Treaties 4, 6, 7, 8 and 10: the Blackfoot Confederacy – Kainai, Piikani, and Siksika – the Cree, Dene, Saulteaux, Nakota Sioux, Stoney Nakoda, and the Tsuu Tina Nation and the Métis People of Alberta. This includes the Métis Settlements and the Six Regions of the Métis Nation of Alberta within the historical Northwest Métis Homeland. We acknowledge the many First Nations, Métis and Inuit who have lived in and cared for these lands for generations.

We are grateful for the traditional knowledge keepers and Elders who are still with us today and those who have gone before us. We make this acknowledgement as an act of reconciliation and recognize all people who have ties to this place, and thank them for continuing to teach us how we might all be here together.

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Bebe Buckskin, Longview
Travel Alberta / Phil Copithorne

01 Executive Summary

Alberta's tourism industry is at a pivotal point in time as travel resumes following two years of unprecedented challenges. Leveraging pent-up demand for travel over the next three years will be key to accelerating recovery and growing our visitor economy.

The 2022-25 Business Plan serves as a roadmap to guide organizational work over the next three years. Building on the 2021-24 Bootstrap Plan, Travel Alberta will continue to prioritize the immediate needs of partners while positioning the province for a prosperous future by capitalizing on opportunities to capture new market share.

Travel Alberta has refined its three strategic pillars of marketing, access and place in response to stakeholder engagement and learnings. The interdependencies of all three pillars have been thoughtfully considered so that the objectives and initiatives outlined in this plan support and propel one another forward. Place considers access, and access aligns with marketing and promotion.

Currently, Alberta is on track to return to pre-pandemic visitor spending levels by 2024 in alignment with the Bootstrap Plan. Forecasts

indicate that the visitor economy has the potential to almost double by 2035. That's good news for all Albertans in terms of job creation, business support and spending – collectively contributing to our province's economy and diversification.

Growing our share of the market is not just about the number of visitors, but also about the segment of visitors. Enticing high-value visitors, who spend more time, more money, and are more likely to return, is where the real return on investment lies. Attracting high-value visitors will require enhanced and new inventory to ensure the type of accommodations, products and memorable experiences they want are available. This is a challenge, but one that can be overcome by working together.

Travel Alberta will support our industry beyond financial investments with data and insights to

help businesses make good decisions, helping our partners navigate regulatory environments, and stakeholder engagement to identify regions for development considering environmental, cultural and historical significance as well as community readiness.

As Travel Alberta continues its shift from being a marketing agency to a provincial destination management organization, business excellence will be foundational to achieving the business plan objectives and realizing a thriving visitor economy that prospers all Albertans. Leadership maintains a commitment to increased efficiency, agility and a strong, commercial-like acumen to ensure accountability.

The Government of Alberta's adoption of the Bootstrap Business plan as a new path forward demonstrates confidence in the direction of Travel Alberta and belief in the tourism industry as a key economic driver. Travel Alberta looks forward to further bolstering the tourism sector as it continues to gain strength and build momentum.



Sylvan Lake
Travel Alberta / Phil Copithorne, C&B Advertising

02

Environmental Scan

COVID-19 IMPACT

COVID-19 significantly disrupted the international travel and tourism landscape. According to the United Nations World Tourism Organization, the collapse of international travel represented an estimated loss of \$1.3 trillion USD in export revenues in 2020—more than 11 times the loss recorded during the 2009 global economic crisis¹. Between 100 and 120 million direct tourism jobs were affected worldwide, many of them with small and medium-sized businesses reliant on tourism for their livelihood.

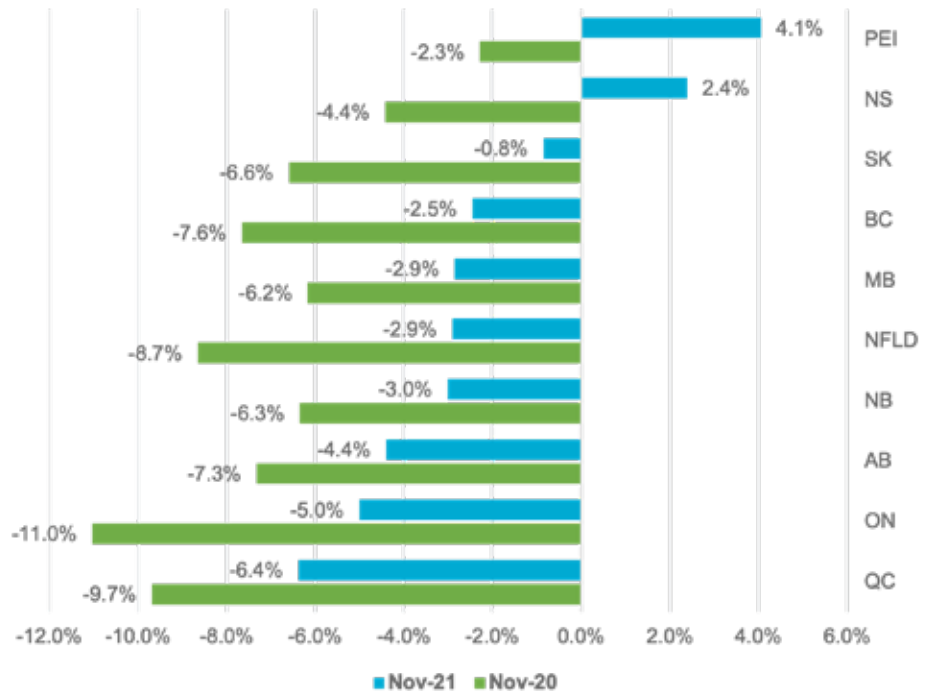
While international travel decreased significantly in 2020, regional (domestic) travel increased as people stayed closer to home. Worldwide, domestic guest nights grew from 70 per cent in 2019 to 88 per cent in 2021². While domestic travel receipts softened the economic blow to the sector, total revenue remained low as these travellers spend less than one-quarter of their international counterparts.

In 2019, Alberta’s tourism spending was \$8.2 billion. In 2020, it fell to \$4.7 billion (43 per cent), representing a loss of \$2.5 billion in GDP and nearly 27,000 jobs. While spending improved to \$5.3 billion in 2021 (13 per cent), it remains 35 per cent lower than 2019 levels³. These figures do not account for spending at the origin of a visitor’s trip or commercial airfares in Canada.

TOURISM BUSINESSES

By November 2020, the number of active tourism businesses in Alberta declined by 7 per cent. This figure improved by November 2021 to only 4 per cent below 2019 and was on par with the national average⁴. This is an early but positive indicator that Alberta businesses are resilient and well-positioned to match the recovery of other provinces as the economy rebounds.

Active Tourism Businesses by Region
November 2021 and November 2020 compared to November 2019



Source: Statistics Canada, Business Openings and Closures

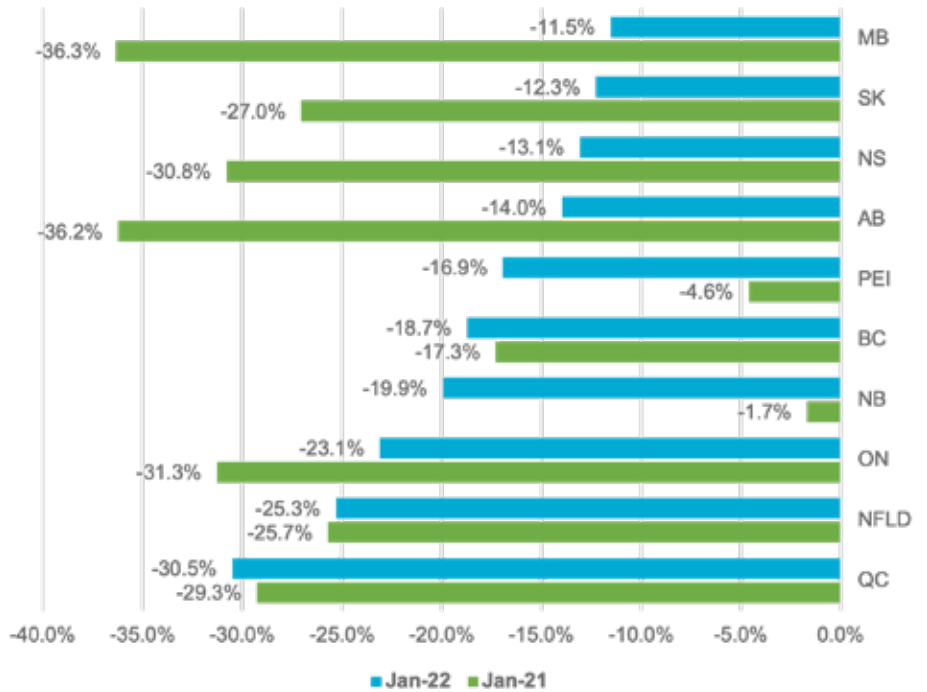
¹ UNWTO 2020: Year in Review
² Oxford Economics, Global Travel Service (October 2021)
³ Tourism Economics, Alberta Tourism Spending Forecast (October 2021)
⁴ Statistics Canada, Business Openings and Closures

LABOUR FORCE

In January 2021, the number of tourism jobs had declined by 36 per cent compared to 2019. Jobs in Alberta significantly recovered by January 2022 to 14 per cent below January 2019 and ahead of the national average by 8 points⁵.

Alberta’s labour force is facing a severe shortage of skilled and unskilled workers, with workforce participation rates dropping from 71 per cent in 2019 to 66.4 per cent in the second quarter of 2020 as job numbers declined⁶. Competition for workers, the rising cost of living and limited housing supply are significant contributors to recruitment and retention challenges facing tourism businesses.

Tourism Employment by Region
January 2022 and January 2021 compared to January 2019



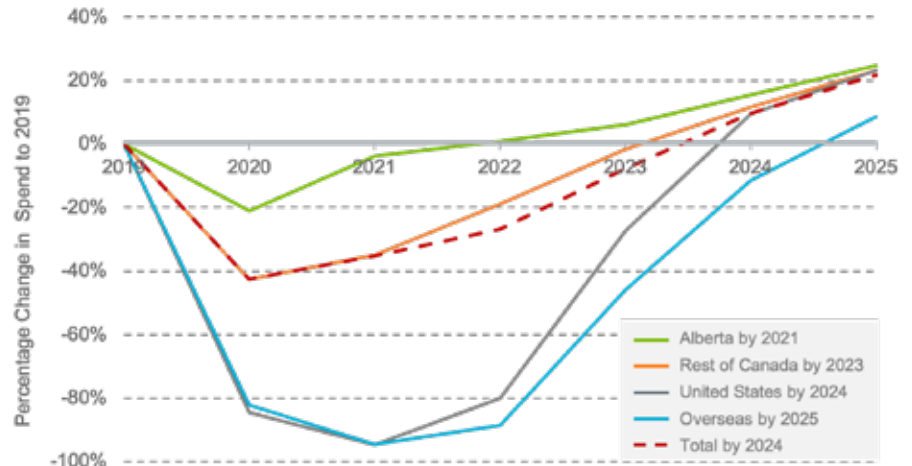
Source: Statistics Canada, Labour Force Survey

VISITOR SPEND

Working with Tourism Economics, Travel Alberta forecasts updated recovery timelines as conditions change and trend data becomes available. The current forecast, which assumes a reduction in frequency and severity of COVID-19 variants and restrictions, predicts a rise in international travel in summer 2022, with business and group travel rebounding in fall 2022. Alberta visitor spending is estimated to reach 2019 levels by 2021, spending from the rest of Canada by 2023, the U.S. by 2024, and overseas by 2025. Total expenditures are expected to return to 2019 levels by 2024.

This forecast assumes the successful implementation of Travel Alberta’s 2022/25 Business Plan. Any significant interruption to tourism infrastructure, changes in the regulatory environment, a significant environmental and/or geopolitical event will impact this forecast and ultimately the economic recovery of Alberta’s tourism industry.

Visitor Spend Forecast
Return to 2019 Level



Source: Tourism Economics, Alberta Tourism Spending Forecast (October 2021)

⁵ Statistics Canada, Labour Force Survey (January 2022)

⁶ The Conference Board of Canada, Alberta Two-Year Outlook (November 29, 2021)

OPERATING ENVIRONMENT

Throughout the past two years, traveller motivations have changed to favour destinations that prioritize health and safety and are perceived as having managed the pandemic responsibly. Growing research indicates that consumers support the idea of “responsible travel” as consumers are increasingly conscious of social issues and climate impacts. As tourism enters a new post-pandemic era, travellers are predicted to choose destinations that demonstrate a commitment to preserving local communities, cultures and environmental sustainability. A destination’s response to economic, environmental, social and governance factors will be increasingly considered by visitors in choosing to visit.

The pandemic has affected all aspects of the tourism economy, negatively impacting many tourism businesses and communities. Forced to rely on domestic visitation, which was helpful in softening the blow, the shift to an international market is essential to regain lost revenues and begin to recover. However, capacity issues and labour constraints may impact businesses’ ability to operate at full capacity when tourism numbers rebound. There will likely be challenges balancing the needs of the sector and the growth of additional tourism areas and experiences.

Protecting our natural spaces is a shared responsibility and decisions on investment and development opportunities must consider impacts on the environment and local communities. Sustainable development can positively differentiate Alberta as an environmentally responsible destination while building on its global reputation of majestic landscapes and wide-open spaces that are highly desired by travellers.

Alberta has an opportunity to be the premier destination for authentic Indigenous tourism in ways that promote education, understanding and reconciliation. Culture and people are critical ingredients to tourism success and upholding the heritage and values that make Alberta unique can demonstrate to the world how our province is inclusive, welcoming and equitable toward all peoples and communities.

ENTERPRISE RISK MANAGEMENT

Travel Alberta follows an Enterprise Risk Management (ERM) approach to identifying and managing risks, including:

- international health restrictions that may impact the success of marketing efforts
- challenges faced by airlines and airports that may impact the ability of travellers to access Alberta
- lack of capacity and workforce pressures that may impact business growth and development opportunities in all areas of the province

Travel Alberta actively manages reputational risk to the organization and the Alberta brand by using ERM best practices. The marketing, access and place objectives and initiatives in this plan have been created to address and mitigate the risks indicated above, reinforcing resilience, and developing the industry for growth.

Two Jack Lake, Banff National Park
Travel Alberta



03

About Travel Alberta

Travel Alberta is the destination management organization of the Government of Alberta. We promote Alberta as a desirable place to travel, live, work, invest and learn. Working with businesses throughout the province, we capitalize on Alberta’s breathtaking landscapes and world-class hospitality to develop memorable experiences for visitors to enjoy, in all regions, year-round. Our work directly and indirectly benefits our province, driving visitation and revenue, diversifying the economy, providing jobs, encouraging economic investment, and enhancing quality of life for Albertans and their communities.

Established as a Crown corporation on April 1, 2009, we operate under the authority of the Travel Alberta Act within the Ministry of Jobs, Economy and Innovation.

MANDATE

In 2021, as part of Bill 62, the Travel Alberta Act was amended to expand Travel Alberta’s mandate to include destination management. Under the new mandate, Travel Alberta drives the growth of the province’s visitor economy, creating and promoting must-visit destinations throughout the province.

According to the Travel Alberta Act, the purposes of the Corporation are:

- to market the tourism assets, attractions and opportunities present in Alberta in domestic, national, and international markets,
- to promote the development and growth of the tourism industry in Alberta to increase revenue and employment in, and the economic benefits generated by, the industry,
- to promote Alberta as a destination for tourists and other visitors,
- to assist Alberta communities and tourism industry operators to develop and market their products,
- to provide visitor services, and
- to exercise or perform any other powers, duties and functions authorized by the Lieutenant Governor in Council.



Shaw Millennium Skatepark, Calgary
Travel Alberta / Phil Copithorne

DESTINATION MANAGEMENT

Destination management is a process of leading, influencing and coordinating the management of all the aspects of a destination that contribute to a visitor's experience including the needs of visitors, residents, businesses, and the environment.

Travel Alberta's designation as a destination management organization allows the organization to develop a holistic model for destination development and promotion to deliver streamlined, strategic support to partners and address some key challenges and opportunities, including:

- **Vision, strategic planning and leadership:** Identify ways in which tourism can contribute to a thriving visitor economy, and provide guidance and support to partners, communities and businesses to leverage resources, increase efficiencies and maximize impact.
- **Business support and skills development:** Provide programs and supports to partners, communities, and businesses to encourage investment and innovation in sustainable tourism development.
- **Data, research and intelligence:** Generate and share data on market behaviours, business operating environments, resident sentiment and the value of tourism's contribution to the visitor economy.
- **Economic growth and strategic partnerships:** Drive strategic alignment amongst industry partners and communities to create compelling investment conditions and opportunities that result in sustainable development and visitor economy growth.
- **Community engagement:** Encourage stakeholders and residents to recognize and support the value of the visitor economy from a position of influence and representation.
- **Values-based marketing:** Highlight a community's people, culture and energy to enhance the visitor experience, encourage repeat visitation and increase competitive advantage.

Travel Alberta's role in destination management is threefold:



AS A DRIVER

we strategically invest in destinations and experiences with the greatest potential for a high return. This creates jobs, supports businesses, and diversifies the economy, benefitting all Albertans.



AS A PARTNER

we coordinate a holistic and collaborative approach to growing the visitor economy with our stakeholders. Working together toward common goals fast tracks achievement of them.



AS A CONVENER

we bring together economic development bodies, businesses and governments to accelerate investments, navigate regulatory processes and position tourism as a positive contributor.

04 Strategic Pillar



MARKETING

OUTCOME

Expenditures by high-value travellers from target markets return to 2019 levels by 2024.

High Level Bridge, Lethbridge / Roth and Ramberg
Treaty 7 Territory near the Piikani and Kainai Nations and
Métis Nation of Alberta - Region 3

KEY OBJECTIVES

The global tourism landscape is increasingly competitive, as all destinations struggle to recover from the pandemic. To regain visitor spending revenues to pre-pandemic levels, a strong, united Alberta brand that uniquely differentiates our province from other destinations is critical to success.

Travel Alberta is focusing on sales and marketing initiatives to capitalize on pent-up demand for travel from domestic, regional, U.S. and key international markets.

- 1.1 Lead alignment efforts with key partners to ensure a competitive position in the tourism market.
- 1.2 Implement promotional campaigns (direct to consumer, media, and public relations) and travel trade (business to business) activities to increase consideration of Alberta as a travel destination.

INITIATIVES AND PROGRAMS

<p>01 Collaborate with strategic partners to increase consideration of travel to Alberta.</p>	<p>2022-23 PROGRAMS Foster NorthStar and Destination Canada partnerships to collaborate on initiatives in Canada, the U.S. and select international markets.</p>	<p>2023-24 Encourage partner alignment and efficiency by defining roles with partners in domestic and international markets.</p>	<p>2024-25 Leverage reduced duplication and increased efficiency.</p>
	<p>Lead U.S. market re-entry and restart recovery through relevant channels.</p>	<p>Establish a presence in U.S. and re-enter select international markets.</p>	<p>Maintain a presence in U.S., establish a presence in select international markets and test entry into potential/emerging markets.</p>
<p>02 Strengthen distribution partnerships with trade partners to grow sales in international markets.</p>	<p>2022-23 PROGRAMS Develop itineraries that will grow tourism revenue from high-value travellers in select international markets.</p>	<p>2023-24 Increase proactive business development, marketing, social media, and public relations efforts in select international markets in alignment with Destination Canada.</p>	<p>2024-25 Develop itineraries aligned with new export-ready products and experiences resulting from sustainable tourism development.</p>
<p>03 Evolve the Alberta brand to create pride of place for Albertans and appeal to high-value travellers.</p>	<p>2022-23 PROGRAMS Create content in collaboration with strategic partners.</p>	<p>2023-24 Create content that captures cultural diversity and supports the evolving brand.</p>	<p>2024-25 Develop content strategies to keep up with emerging traveller trends and strengthen destination brand.</p>
	<p>Roll out traveller brand strategy and create photo and video assets that bring this strategy to life.</p>	<p>Collaborate with partners to develop a Team Alberta approach to destination branding.</p>	<p>Leverage insights to evolve the brand strategy to reflect emerging traveller trends and increase Alberta's competitiveness.</p>
<p>04 Optimize digital channels to improve stakeholder relations and traveller engagement, by providing access to information effectively.</p>	<p>2022-23 PROGRAMS Redevelop the consumer website to better engage the traveller and mitigate risks of outdated technology.</p>	<p>2023-24 Develop a new product database to engage the traveller better and mitigate risks of outdated technology.</p>	<p>2024-25 Develop digital channel strategies to keep up with emerging traveller trends and strengthen consideration.</p>



TARGET MARKETS

Travel Alberta identifies and prioritizes market investments by analyzing past market performance and future potential based on key factors, including:

- Number of travellers by market who are predisposed to travel to Alberta in the next two years
- Past visitation and expenditures in Alberta
- Expected return of outbound travel to pre-pandemic levels
- Economic outlook
- Direct and indirect air access

Additional market context is applied to the analysis, including geopolitical situation, cultural nuances, ease of doing business, and alignment with partners to establish priority target markets. Travel Alberta continually monitors market conditions and adjusts priorities as opportunities arise.

2022-23	2023-24	2024-25
Canada	Canada	Canada
U.S.*	U.S.*	U.S.*
U.K.*	U.K.*	U.K.*
	Germany*	Germany*
		Japan*
		Other International Markets

*Under consideration and dependent on safety and health restrictions due to COVID-19.

TARGETING HIGH-VALUE TRAVELLERS



Not all travellers are created equal.

Not all travellers are created equal. Travel Alberta has conducted significant consumer research to identify Alberta’s “high-value traveller”—the type of traveller likely to spend more per visit, yield the highest return on investment and make the most significant contribution to the province’s economic growth.

Regional travellers—those from Alberta—spend an average of \$201 per visitor per trip, domestic travellers from other areas in Canada spend \$523 per visitor per trip, travellers from the U.S. spend \$828 per visitor per trip, and overseas travellers spend and \$1,119 per visitor per trip. High-value travellers are also more likely to travel during off-peak times of the year, spend more on high-end experiences and explore more areas of the province.

Travel Alberta’s business outcomes, objectives and initiatives prioritize high-value travellers while ensuring that the province’s businesses and communities remain welcoming and accessible to travellers of all types.



TRAVEL ALBERTA'S BRAND EVOLUTION

After ten years, Travel Alberta's award-winning brand is evolving to respond to the shifts in our world, the travel industry, and traveller desires. With its launch on the world stage in 2011, the Travel Alberta brand, (remember to breathe), helped attract millions of visitors to our province, generating billions of dollars to the visitor economy. However, like all brands, originality and consumer preference dictate the ongoing success of a brand. With a changing mandate and organizational purpose, we need to appeal to specific audiences and demonstrate our value in a different way.

An evolution of the Travel Alberta brand will act as a guide to help us tell compelling stories and create an emotional connection through our messaging to consumers, industry partners, Travel Alberta team members and residents of Alberta. At the heart of this brand evolution is a renewed focus on Alberta's people and personality.

Travel Alberta conducted research with travellers and trade partners in each of our key markets as well as with tourism businesses and destinations throughout the province. The research objectives were to identify what:

- Differentiates Alberta
- Presents an appealing and believable view of Albertans
- Positively influences perceptions of Alberta
- Increases urgency to visit Alberta
- Creates notoriety for Alberta

As this is an evolution of the brand, past photography, video and stories will continue to be used in our marketing. Aligning with the Canadian brand in international markets will give Alberta more recognition and a values-based marketing approach will weave in stories about the people and personality, along with the iconic landscapes Alberta is known for. Further roll-out of the evolved brand strategy to stakeholders and consumers will occur throughout 2022/23.



05

Strategic Pillar



ACCESS

OUTCOME

Visitors have access to Alberta's destinations and experiences.

KEY OBJECTIVES

Most international travellers, including 70 percent of U.S. travellers, arrive to Alberta by air. Travel Alberta is working closely to restore and increase direct routes and frequency to Alberta’s international airports. Travel Alberta’s airline strategy uses a phased approach to air recovery, working with airlines and airports to determine the routes most likely to yield the highest return on investment.

In 2021-22, Travel Alberta worked almost entirely to support routes that were reduced or cancelled due to COVID, but in 2022 and beyond, will

focus on recovering transborder and international routes in alignment with the target markets detailed above.

- 2.1 Partner with airlines to increase air connectivity with U.S. and international destinations to attract high-value travellers in all seasons.
- 2.2 Partner with other government departments to increase transportation access and digital connectivity throughout the province.

INITIATIVES AND PROGRAMS

01

Increase direct flights to Alberta, focusing on U.S. and international markets.

2022-23 PROGRAMS

Airline Partnership Program to build flight capacity and frequency from target markets.

2023-24 PROGRAMS

Increase seat capacity of U.S. routes, incremental spending by inbound visitors and develop potential international markets.

2024-25 PROGRAMS

Deepen alignment with airlines, airports and Destination Canada to increase ROI on international routes.

02

Work within the Government of Alberta and across other orders of government to align tourism transportation priorities.

2022-23 PROGRAMS

Inform and influence policy through research and active engagement with GOA ministries on behalf of tourism businesses and other stakeholders.

2023-24 PROGRAMS

Enhance working relationships with GOA and influence policies and programs to better support the visitor economy.

2024-25 PROGRAMS

Continue to assess and evolve engagement based on the business environment.



Calgary International Airport YYC

06

Strategic Pillar



PLACE

OUTCOME

Alberta's visitor economy is recovering through strengthened businesses, experiences and communities, attracting high-value travellers.



Athabasca River / Roam Creative
Treaty 6 Territory and Métis Nation of Alberta - Region

KEY OBJECTIVES

Travel Alberta has developed a holistic approach to destination development, including a targeted investment strategy and a traveller corridor plan to drive innovation and create opportunities for job creation and sustainable community economic growth.

- 3.1 Spearhead the development of destination master plans for 10 traveller corridors (over three years) to increase capacity in priority regions while ensuring sustainable development and growth for the future.

Travel Alberta has identified 10 potential tourism development areas (traveller corridors) throughout the province, based on the economic growth potential and job creation. Each area was assessed against several criteria, including existing marketable experiences, dedicated destination organizations, government and community support and a critical mass of private sector investment potential.

- 3.2 Implement a sustainable tourism investment strategy to stimulate product development, encouraging job creation and sustainable economic growth throughout the province.

By selecting specific locations to invest in, Travel Alberta can have a greater impact on economies in rural communities of high potential and target locations outside the Rockies and the two major cities.

- 3.3 Increase opportunity and reduce red tape for entrepreneurs and small businesses to enable sustainable development and growth.

INITIATIVES AND PROGRAMS

01
Implement a tourism investment strategy focusing on opportunities likely to attract high-value travellers and yield the greatest return on investment.

2022-23 PROGRAMS
Invest \$2.5 million annually to support rural experience development and event promotion through the Cooperative Investment Fund.

Invest \$5.5 million annually with NorthStar and Constellation partners to increase capacity and attract events, meetings and conventions in Alberta’s major urban and priority growth areas through the Community Investment Fund.

Invest \$7.5 million annually to support Growth, Innovation and Accelerator programs through the Product Investment Fund. These programs support new, emerging, and established tourism businesses and entrepreneurs.

2023-24 PROGRAMS

Assess investment criteria and implement recommendations based on learnings and industry needs.

Assess investment criteria and implement recommendations based on learnings and industry needs.

Assess investment criteria and implement recommendations based on learnings and industry needs.

2024-25 PROGRAMS



INITIATIVES AND PROGRAMS

02

Work with community leaders, local destination organizations, and tourism businesses in each traveller corridor to create a unified approach to sustainable destination development and investment.

2022-23 PROGRAMS

Traveller Corridor Strategy — Initiate the development of Destination Management Plans in the highest potential corridors.

2023-24 PROGRAMS

Activate recommended strategies in the top 3 corridors, including development opportunities.

Leverage learnings and deploy best practices for destination planning with the next round of top-ranked corridors.

2024-25 PROGRAMS

Secure investment commitments in key areas.
Activate recommended strategies for the next round of corridor plans.

03

Continue to partner with Indigenous Tourism Alberta and invest \$4 million over three years to support the growth and development of Indigenous tourism businesses and communities.

2022-23 PROGRAMS

Invest \$1.25 Million into the capacity of the ITA and support an Indigenous-led product development approach.

2023-24 PROGRAMS

Invest \$1.3 Million into the evolving capacity of the ITA.

2024-25 PROGRAMS

Review successes and learnings and refine support strategy and funding commitments.

04

Work with federal tourism organizations and regional development agencies to align priorities and secure support for Alberta's tourism businesses and destinations.

2022-23 PROGRAMS

Labour attraction and retention programs — policy and marketing support.

2023-24 PROGRAMS

Evolve labour attraction and retention programs based on learnings and industry needs.

2024-25 PROGRAMS

Work with communities and partners to support labour attraction and retention, as economic factors necessitate.

Prairies Tourism Partnership funding application to the federal government to enable partners to access federal funding.

Explore and establish strategic partnerships across the Prairies to leverage and align industry investments.

Refine approach to pan-Prairies initiatives in alignment with traveller trends and in consideration of lessons learned in the first year of implementation.

05

Provide expertise and business development support to businesses and entrepreneurs by delivering coaching while cooperating with the Government of Alberta to navigate regulatory processes.

2022-23 PROGRAMS

Business Development and Entrepreneurship support with business planning and development, accessing capital and navigating provincial policy/permitting.

2023-24 PROGRAMS

Continue to assess and evolve programs based on the business needs.

2024-25 PROGRAMS

Develop a support system to streamline business development based on learnings from the last two years.

05

Grow Albertans' support of the visitor economy.

2022-23 PROGRAMS

Resident Champion strategy to ensure residents understand and support the value of tourism in their communities.

2023-24 PROGRAMS

Evolve the Resident Champion strategy to support jobs campaigns and placemaking initiatives in emerging areas.

2024-25 PROGRAMS

Continue to support the evolution of the Resident Champion strategy as an important indicator of the visitor economy.

2022-25 CORPORATE SCORECARD

MARKETING

OUTCOME	PERFORMANCE METRIC	BASELINE	2022-23	2023-24	2023-24
Expenditures by high-value travellers from target markets return to 2019 levels by 2024.	Incremental change in searches for Alberta destinations in U.S. target regions versus control markets.	19%*	25%	20%	5%

ACCESS

OUTCOME	PERFORMANCE METRIC	BASELINE	2022-23	2023-24	2023-24
Visitors have access to Alberta's destinations and experiences.	ROI ratio (incremental tourism spend) on new/recovered air routes and additional frequency.	1:4 (\$16M)	1:6 (\$36M)	1:7 (\$42M)	1:8 (\$48M)

PLACE

OUTCOME	PERFORMANCE METRIC	BASELINE	2022-23	2023-24	2023-24
Alberta's visitor economy is recovering through strengthened businesses, experiences and communities, attracting high-value travellers.	Impact on GDP from total investments of projects funded by the Product Investment Fund (Growth Program).	\$8.5M direct impact	\$9.5M direct impact	\$10M direct impact	\$10.5M direct impact
		\$33M total impact	\$37M total impact	\$39M total impact	\$41M total impact
	Ratio of private sector investment driven by Travel Alberta's investment in the Growth Program.	1:2.6	1:2.6	1:2.8	1:3
	Per cent of Albertans who feel tourism is important to their community.	63%	63%	66%	70%

*2021/22 Actuals only represent Oct-Dec 2021

CORPORATE SCORECARD ASSUMPTIONS

The performance targets for the strategic outcomes are based on the following assumptions:

Economy and COVID-19

- Alberta's economy grew by 6.1 per cent in 2021 and is forecasted to grow by 5.1 per cent in 2022.
- Variants and virus waves decrease in intensity and frequency but continue to impact recovery.

Tourism Industry

- Border restrictions ease in the spring, and U.S. travel increases significantly in the summer of 2022.
- Business and group travel increases significantly in the fall of 2022.
- Any interruption of supply or distribution of tourism products and transportation infrastructure will be minor and temporary, and supply will be able to meet demand.

Investments

- The regulatory environment does not change significantly.
- The U.S. market remains a primary focus for Destination Canada and provincial destination organizations, maintaining or exceeding investments.



Dark Sky Guides, Waterton Lakes National Park
Travel Alberta / Colin Way

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