



InterVISTAS

a company of Royal HaskoningDHV

Tourism Kelowna
Visitor Intercept Survey Findings
FINAL DRAFT REPORT

January 17, 2017

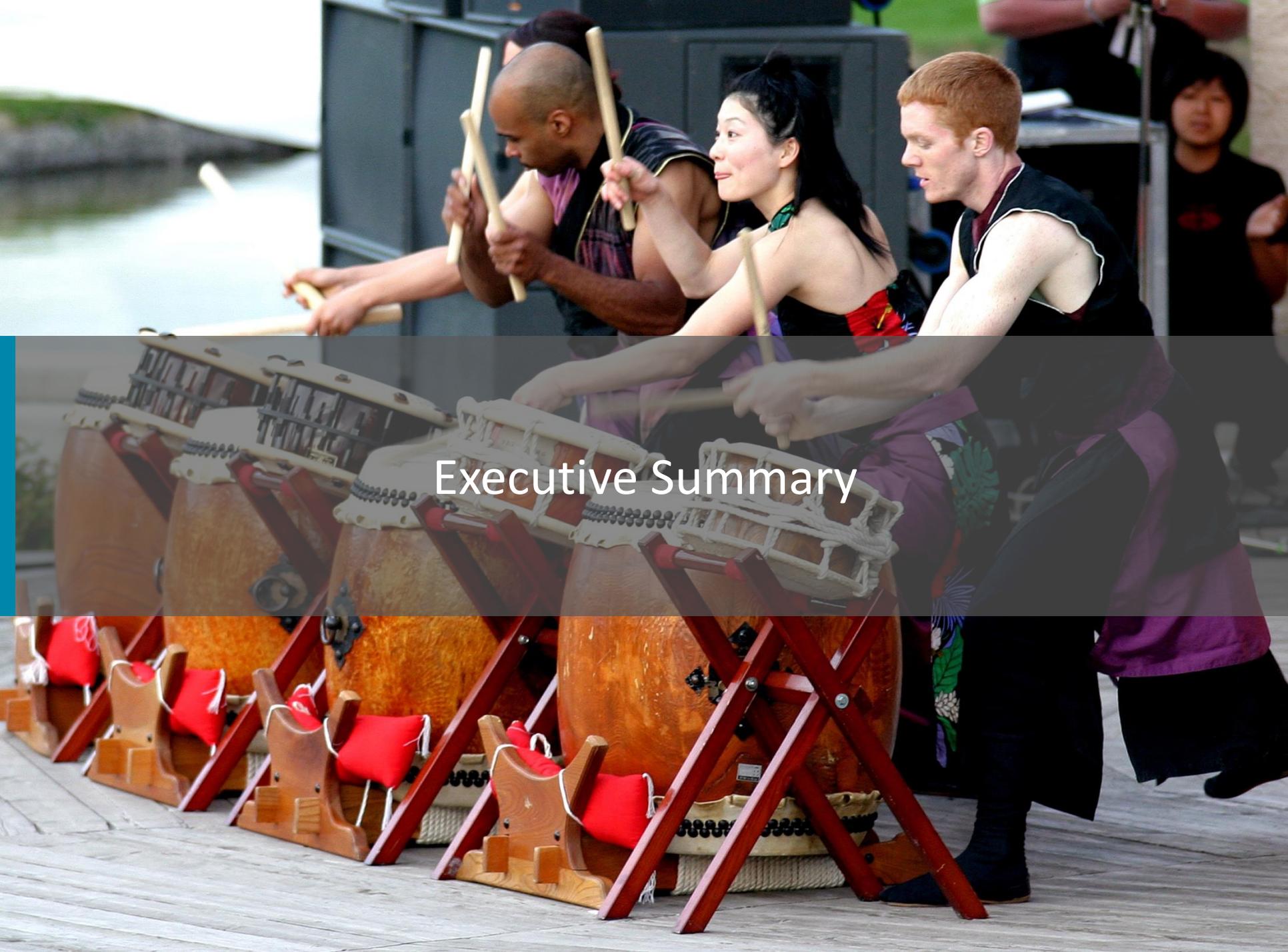
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Executive Summary

Executive Summary



Tourism Kelowna commissioned InterVISTAS Consulting Group to design and conduct a visitor intercept survey program in 2016 as part of a comprehensive Economic Impact Study update currently underway. The objectives of the survey program were twofold: generate updated foundation visitor information as a key data input into the Economic Impact Study; develop new stand alone visitor profiles and market intelligence resources. The survey collected information on Kelowna visitor characteristics, visitor needs and preferences, as well as visitor's average expenditures.

The survey was conducted over three seasons in 2016 – in the Spring, Summer and Fall. Visitors were interviewed at four locations throughout the City of Kelowna. In total, 1,400 visitor interviews were conducted between May and October, 2016.

Executive Summary



➤ The majority (59%) of visitors travelled to Kelowna for leisure purposes, with over three quarters (82%) originating from Canada. The most popular reasons given for visiting were sightseeing (33%), family vacation (31%), winery touring (18%), and for Kelowna’s water-based recreation and beaches (17%).

➤ On average, visitors spent a total of 12.4 nights away from home throughout their complete trip, and stayed in Kelowna for 6.7 nights. The average travel party consisted of three people, with most visitors travelling with their spouse/partner and friends.

➤ The majority (70%) of visitors drove to Kelowna, while more than one-in-four (26%) flew into Kelowna International Airport. While in Kelowna, close to half (47%) stayed at a hotel/motel/resort, with less than a third (27%) staying with family and friends.

➤ As Kelowna has a wide-range of high quality in-demand activities and attractions, 61% of travellers were returning visitors to Kelowna. Beaches/parks/water activities (69%) remain the most popular set of activities among visitors.

Executive Summary

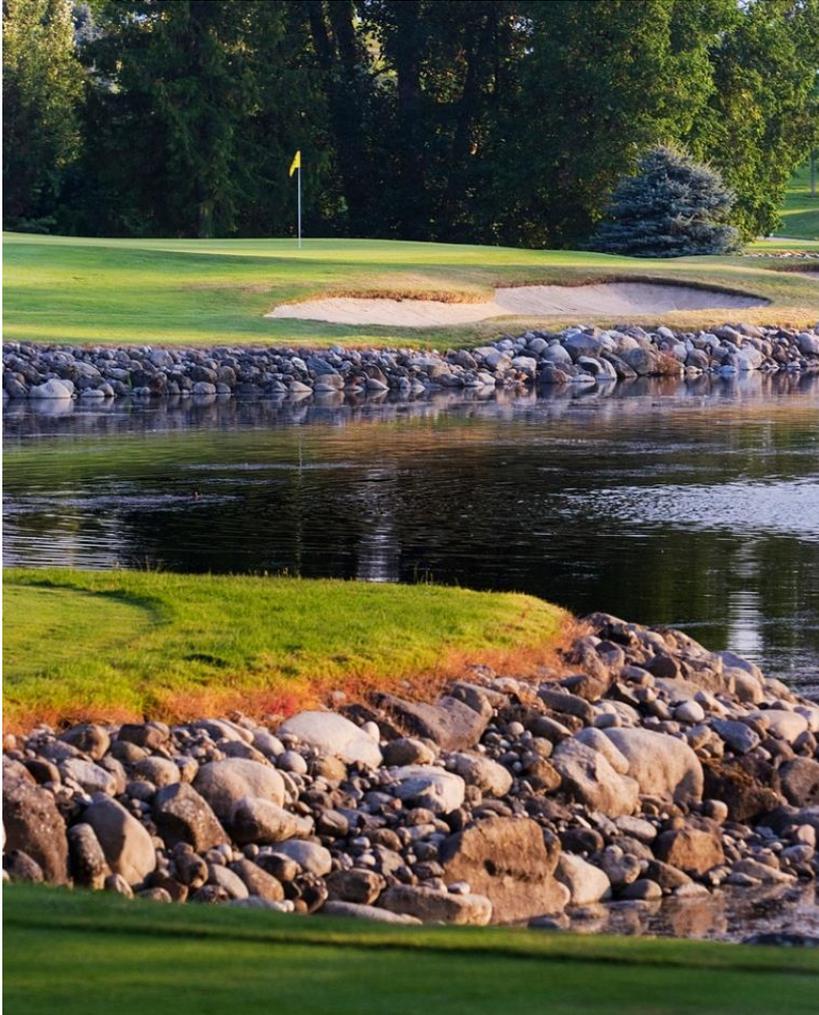


- Total average spending by all parties while in Kelowna was \$1,370. The average spending per person was \$510. Overnight visitors spent \$240 per day, while day visitors spent \$250 on average.
- Accommodations expenses (31%) and food and beverage expenses (30%) made up the largest proportions of visitor spending categories.
- A significant majority of visitors (77%) were very satisfied with their overall experience in Kelowna. As a result, respondents were likely to recommend Kelowna as a travel destination, with a Net Promoter Score of +65.
- As beaches/parks/water activities (69%) were the most popular range of activities visitors participated/will participate in, the majority of respondents (82%) indicated that having well maintained/high quality parks and beaches was important in their decision to choose Kelowna as a place to visit.



Methodology

Methodology



- The visitor intercept survey was conducted over three phases:
 - Spring (May 19 – 29, 2016)
 - Summer (July 5 – August 15, 2016)
 - Fall (September 23 – October 3, 2016)
- Visitors were intercepted and interviewed at select locations:
 - City of Kelowna waterfront walkways
(all three phases)
 - City of Kelowna waterfront parks
(Summer and Fall phases only)
 - Summerhill Winery
(Spring phase only)
- A total of 1,400 intercept surveys were completed in total.



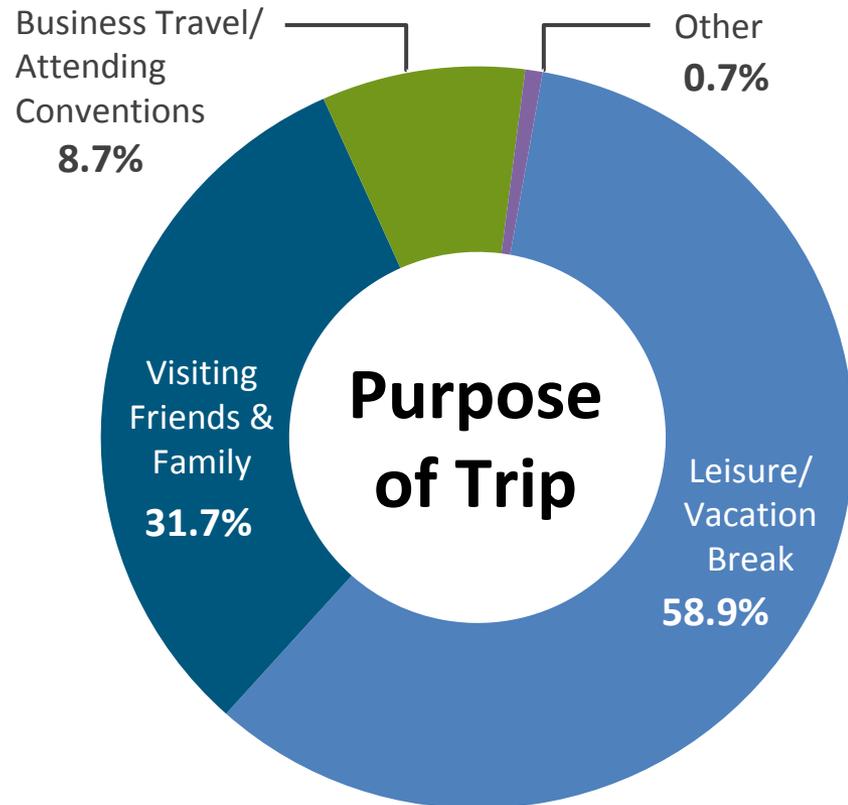
Visitor Intercept Survey Findings:
Visitor Profile

Purpose of Trip

- The majority of visitors (59%) to Kelowna indicated that the main purpose of their trip was for a leisure/vacation break.
- Approximately one third (32%) of respondents were in Kelowna to visit friends and family.
- Approximately 9% of visitors were on business travel or attending conventions.
- Other reasons for visiting Kelowna included medical appointments.



What is the main purpose of your trip?



Note: No comparisons were made to the 2011 visitor research results as this question was not part of the 2011 survey.

Purpose of Trip

- The most popular reasons for visiting Kelowna were sightseeing (33%) and family vacation (31%), with approximately one third of respondents indicating each of these as one of their top reasons for their trip.
- Winery touring (18%) and water-based recreation/beaches (17%) were also common reasons visitors travel to Kelowna.
- Golf, festivals or events, and agricultural experiences each accounted for less than 10% of responses.
- Other reasons cited for visiting Kelowna included business travel, attending a wedding, participating in a sports tournament, and viewing art galleries and museums.



What are the top reasons for this specific trip?



Note: No comparisons were made to the 2011 visitor research results as this question was not part of the 2011 survey.

Area of Origin

- More than three quarters (82%) of visitors originated from Canada. Domestic visitation was higher than 2011 (76%).
- The majority (39%) of Canadian visitors were from BC, an increase from 2011 (22%). The split between Greater Vancouver visitors (19%) and Other BC visitors (20%) was roughly equal.
- The proportion of Alberta visitors dropped to 26% in 2016 from 46% in 2011, while the share of Ontario visitors increased to 8% from 2% in 2011.
- Total U.S. visitation grew slightly over the five year period by 3%, accounting for 5% of total visitation in 2016. Most visitors originated from Washington State and California. However, there were also visitors from U.S. Eastern states (such as New York, Virginia and Maine).
- International visitation comprised 12% of the survey total, a decrease from 22% in 2011. The largest groups of international visitors continued to be from the Asia-Pacific region (3%), followed by the UK (2%) and Germany (1%).



Where are you from?

Origin	2016	(2011)
BC	38.6%	(+)
Alberta	26.0%	(-)
Ontario	7.5%	(+)
Other Canada	10.0%	(+)
Total Canada	82.1%	(+)

BC	2016	(2011)
Greater Vancouver	18.7%	(+)
Other BC	19.9%	(+)

Washington	0.7%	(N/A)
California	0.7%	(N/A)
Oregon	0.4%	(N/A)
Other US	3.6%	(N/A)
Total US	5.4%	(+)

Other International	2016	(2011)
Mexico	0.6%	(N/A)
France	0.4%	(N/A)
Other Various	4.3%	(-)

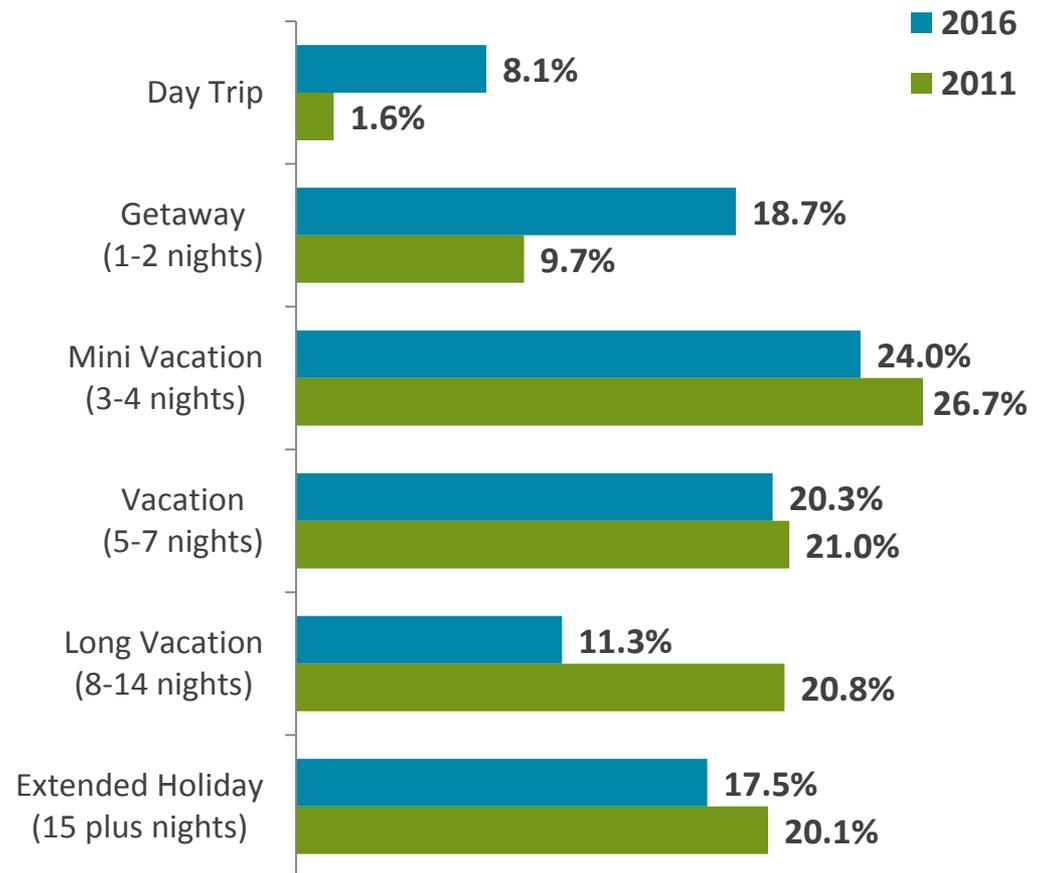
Asia-Pacific	3.4%	(-)
UK	2.3%	(+)
Germany	1.4%	(-)
Other International	5.3%	(-)
Total International	12.4%	(-)

Length of Trip: Overall Time Away

- The average number of nights visitors spent away from home for their entire trip was 12.4 nights, which is slightly longer than the average length of stay in 2011 (11.1 nights).
- Mini vacations (3-4 nights) and vacations (5-7 nights) continued to be the more common length of trips, accounting for 24% and 20% of trips, respectively.
- The proportion of getaways (1-2 nights) increased significantly from 10% in 2011 to 19% in 2016, while the share of long vacations (8-14 nights) decreased by 10% over the same time period.
- Day trips comprised 8% of all trips in 2016, and increased from 2% in 2011.



How many nights are you away from home on this trip?

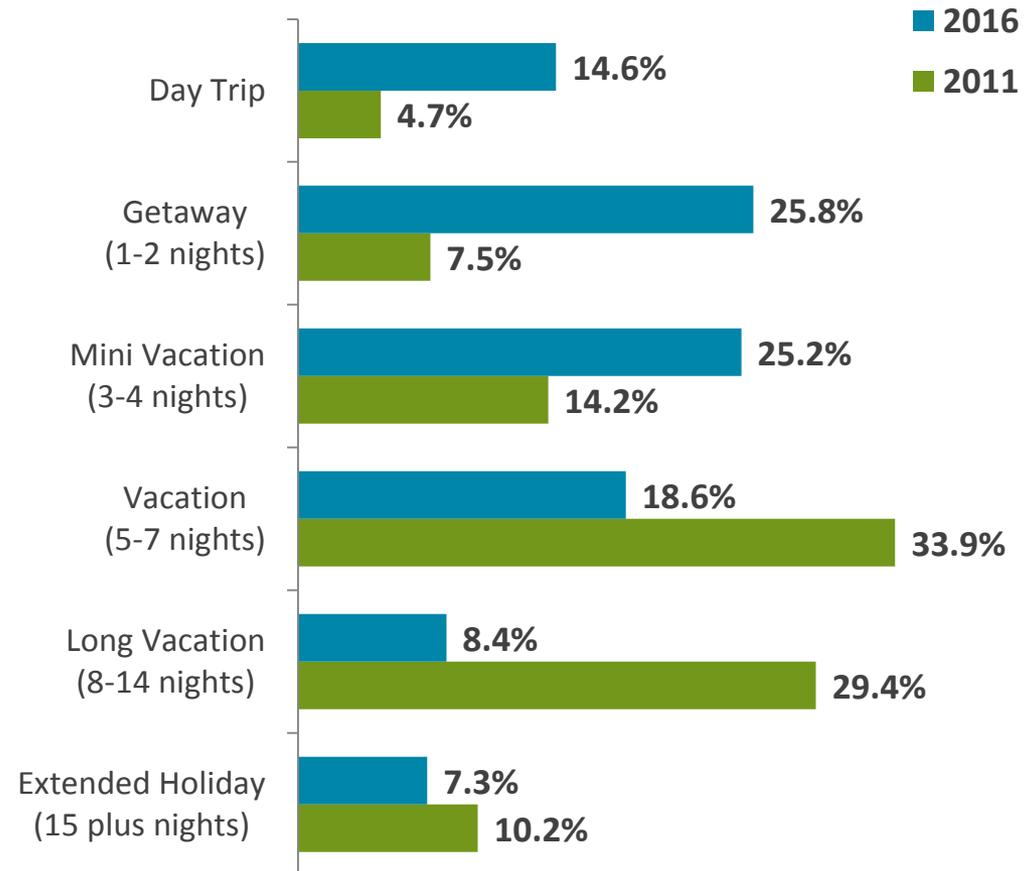


Length of Trip: Nights in Kelowna

- The average number of nights visitors spent in Kelowna was 6.7 nights. This is less than the average number of nights visitors spent away from home overall, indicating that visitors had likely visited other locations on the same trip. However, visitors are staying longer in Kelowna on their trips, as it is more than the average stay length of 5.5 nights in 2011.
- The most common trips in Kelowna were getaways (1-2 nights) accounting for 26%. Mini vacations (3-4 nights) were the next common trip type at 25%.
- Although visitors were staying longer on average, the share of vacations (5-7 nights), long vacations (8-14 nights) and extended holidays (15 plus nights) decreased over the five year period.
- While day trips accounted for only 5% of all trips in 2011, they accounted for 15% of trips in 2016.



How many nights will you spend in Kelowna on this trip?

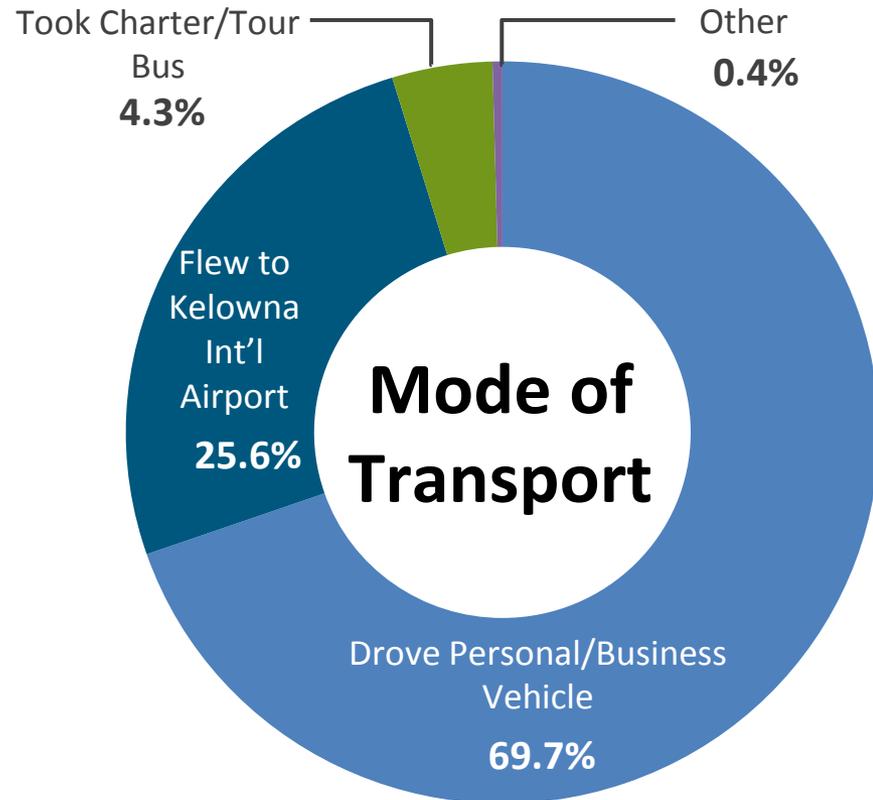


Mode of Transport to Kelowna

- The majority of visitors (70%) drove a personal or business vehicle to Kelowna.
- The second most common mode of transport to Kelowna was by air, with 26% of visitors arriving via Kelowna International Airport.
- Charter/tour bus visitors accounted for 4% of total visitation.



On this trip, how did you get to Kelowna?



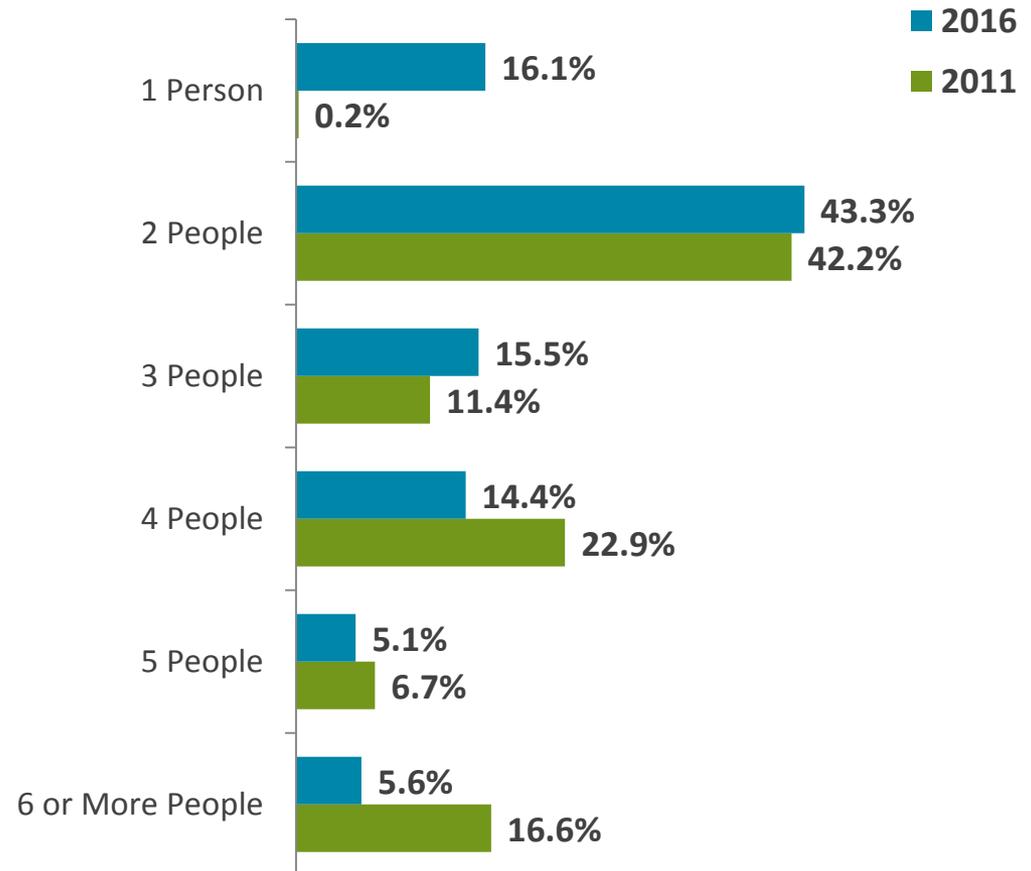
Note: No comparisons were made to the 2011 visitor research results as this question was not part of the 2011 survey.

Travel Party Size

- The average party size in 2016 was 3 people, slightly less than the average of 3.6 people in 2011.
- Similar to 2011, the most common party size was 2 people (43%).
- Three-person parties made up 16%, while four-person parties accounted for 14% in 2016.
- The proportion of larger travel parties of 5 people and 6 or more people decreased to 5% and 6%, respectively, in 2016 compared to 2011.
- People travelling on their own comprised 16.1%, with more people travelling alone in the shoulder seasons. This is a significant increase from only 0.2% in 2011 overall, yet it is noted that the 2011 survey only interviewed summer travellers.



Including yourself, how many people are in your travel party during this trip?

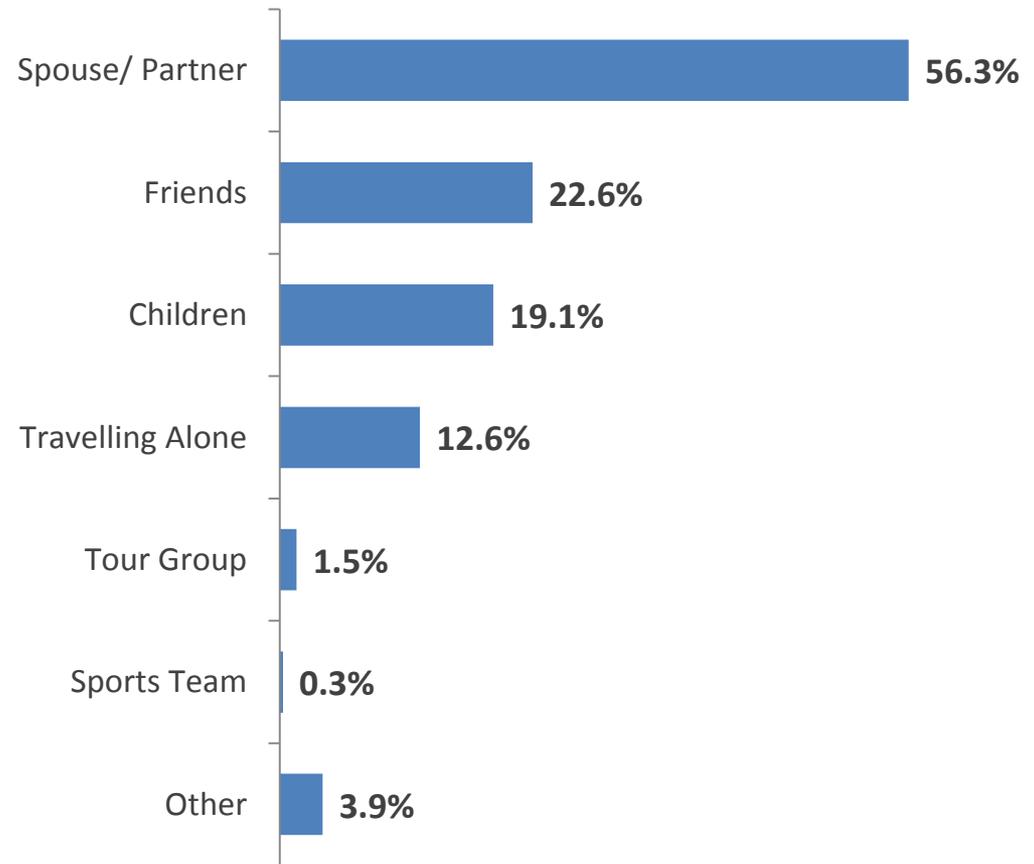


Travel Party Type

- The common travel companions of visitors were their spouse or partner, accounting for more than half (56%) of all respondents.
- Friends and children were the next most common travel companions, accounting for 23% and 19%, respectively.
- Thirteen percent of total visitation were individuals travelling alone to Kelowna.
- Larger groups, such as tour groups (2%) and sports teams (0.3%) represented a smaller share of visitation.
- Other travel companions included business colleagues and extended family members and relatives.



Who are you travelling with on this trip?



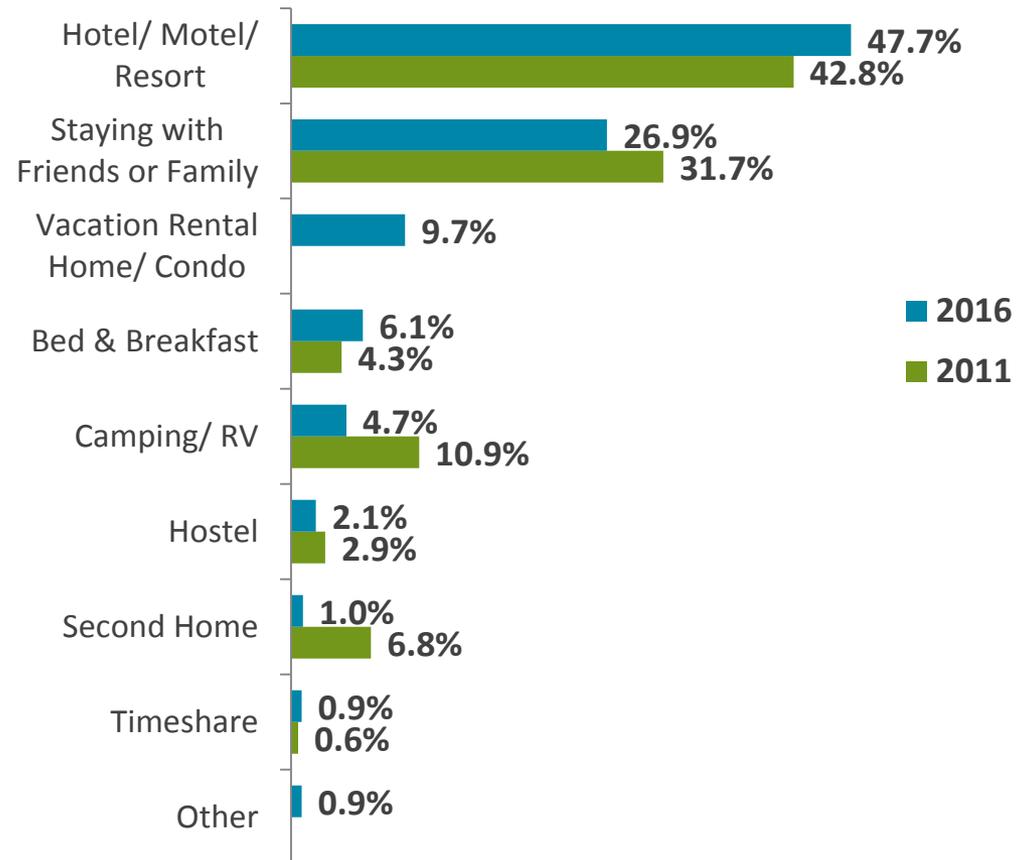
Note: No comparisons were made to the 2011 visitor research results as this question was not part of the 2011 survey.

Preferred Accommodations

- Nearly half (48%) of overnight visitors stayed at a hotel/motel/resort during their trip to Kelowna, a small increase from 2011.
- Staying with friends and family (27%) was the next most common response, down from 32% in 2011.
- With the increase in vacation rental homes/condos in recent years, this type of accommodation accounted for 10% of visitors. (Note that this accommodation type was not tracked in the 2011 survey).
- The proportion of bed & breakfasts increased slightly to 6% in 2016 from 4% in 2011, while camping/RV stays decreased to 5% from 11% over the same time period.



What type of accommodations are you staying in during this trip to Kelowna?

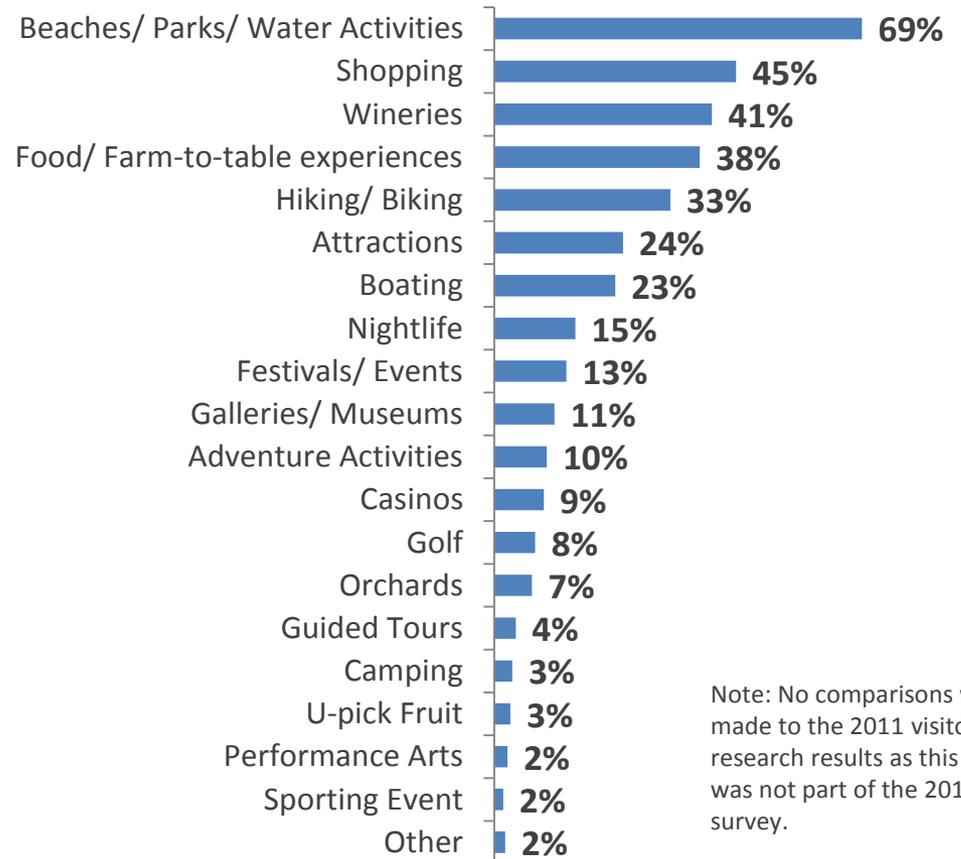


Type of Activities Planned/Participated In

- Beaches/parks/water activities (69%) were the most popular activities visitors are planning to participate in or have participated in while visiting Kelowna.
- Shopping (45%) and wineries (41%) were also common activities of visitors travelling to Kelowna.
- A considerable number of visitors also participated/will participate in food/farm-to-table experiences, hiking/biking, attractions, boating, nightlife, festivals/events, galleries/museums and adventure activities.
- Casinos, golf, orchards, guided tours, camping, u-pick fruit, performance arts and sporting events each accounted for less than 10% of responses.
- Other activities visitors participated/will participate in included business meetings, visiting friends and family, relaxing at the hotel, attending weddings and medical appointments.



Which of the following activities have you/will you/do you plan to participate in during your stay in Kelowna?



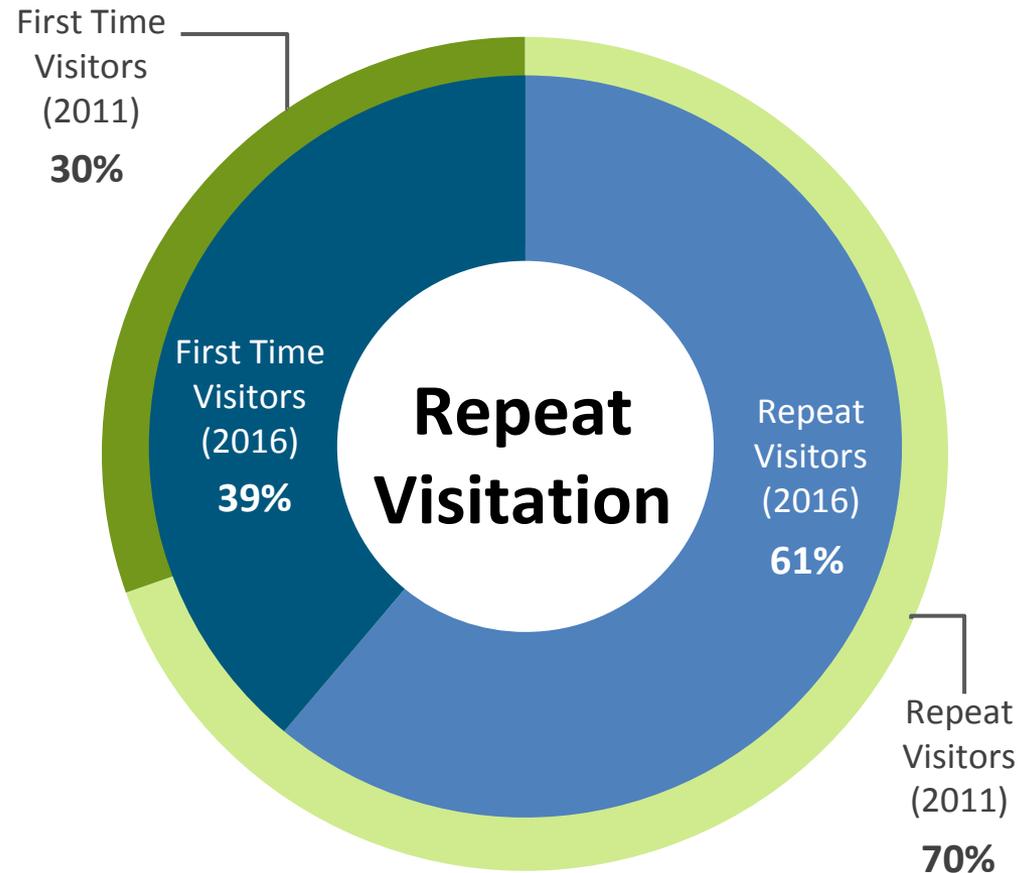
Note: No comparisons were made to the 2011 visitor research results as this question was not part of the 2011 survey.

Repeat Visitation

- The majority (61%) of visitors are returning visitors to Kelowna. The share of repeat visitors has decreased from 70% in 2011.
- In comparison to 2011, Kelowna has been able to attract additional first time visitors. New visitors accounted for 39% of total visitation, a significant increase from 30% in 2011.



Is this your first trip to Kelowna?





Visitor Intercept Survey Findings: Visitor Spending

Average per Trip Spending per Party

- When in Kelowna, the total average spending by visitor parties was \$1,370. This was a significant increase from \$1,240 in 2011, likely due to a longer average length of stay in 2016.
- Average spending per visitor dropped to \$510 in 2016 from \$530 in 2011.
- Consistent with the trend from previous surveys, per day spending of overnight visitor parties dropped from \$328 per day in 2011 to \$240 per day in 2016.
- Average expenditures of visitors staying for the day rose from \$160 in 2011 to \$250 in 2016.
- Accommodations expenses (31%) accounted for the largest proportion of visitor spending by category, followed by food and beverage expenses (30%).



Average per Trip Spending by Category per Party





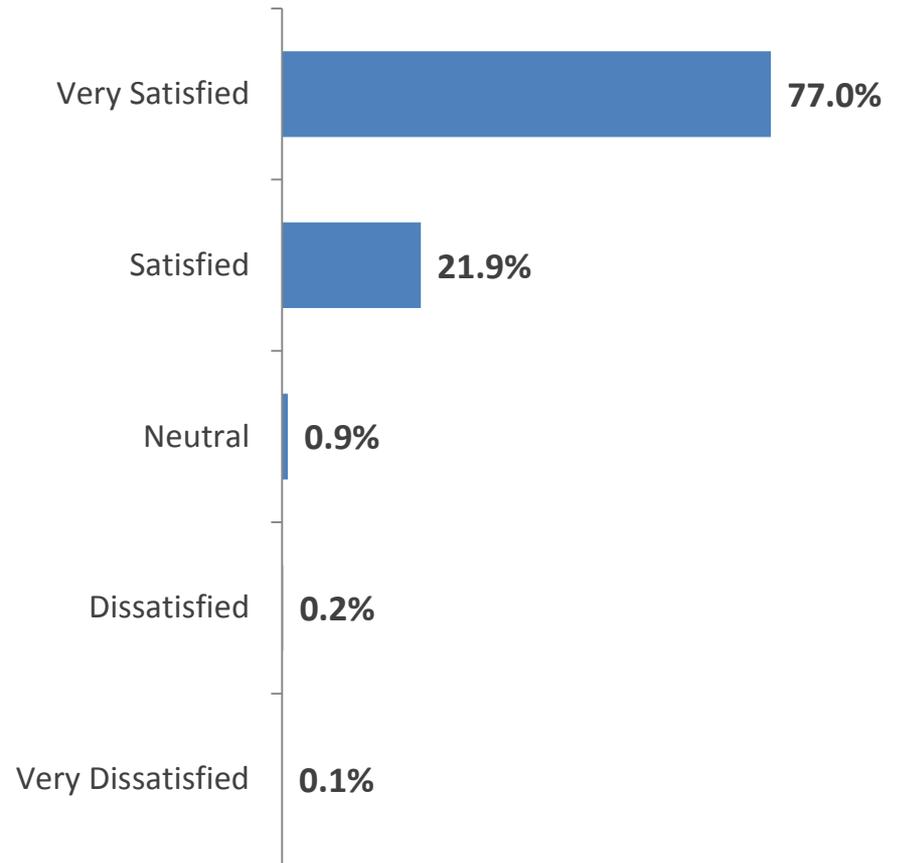
Visitor Intercept Survey Findings: Visitor Satisfaction

Visitor Satisfaction: Overall Experience

- Overall, visitors were highly satisfied with their time spent in Kelowna. Ninety-nine percent of visitors were either very satisfied or satisfied with their Kelowna destination experience.
- Approximately 77% of respondents indicated they were very satisfied with their experience, while 22% indicated they were satisfied.
- Less than 1% of respondents had indicated they were neutral/ambivalent, dissatisfied or very dissatisfied with their experience in Kelowna.



How satisfied are you with your overall experience in Kelowna?



Note: No comparisons were made to the 2011 visitor research results as this question was not part of the 2011 survey.

Visitor Referral and Net Promoter Score

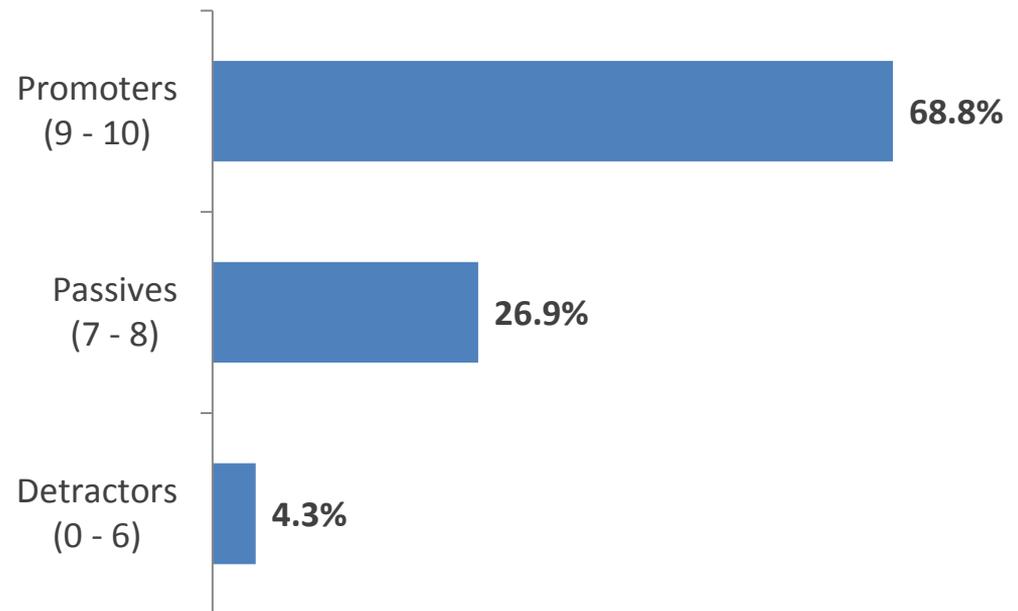
- Visitors were likely to refer others to Kelowna as a place to visit, with a Net Promoter Score of +65.
- Promoters (those indicating a 9 or 10 on the 10-point scale, with 10 being the highest) comprised 69% of responses.
- Twenty seven percent of responses were from passives (those indicating a 7 or 8 on the 10-point scale).
- Detractors (those indicating a response of 6 and below on the 10-point scale) accounted for just 4% of visitor respondents.



How likely are you to recommend Kelowna as a travel destination to a friend, family member or colleague?

Net Promoter Score: +65

On the scale of 0-10, where 0 = "not at all likely" to 10 = "extremely likely".



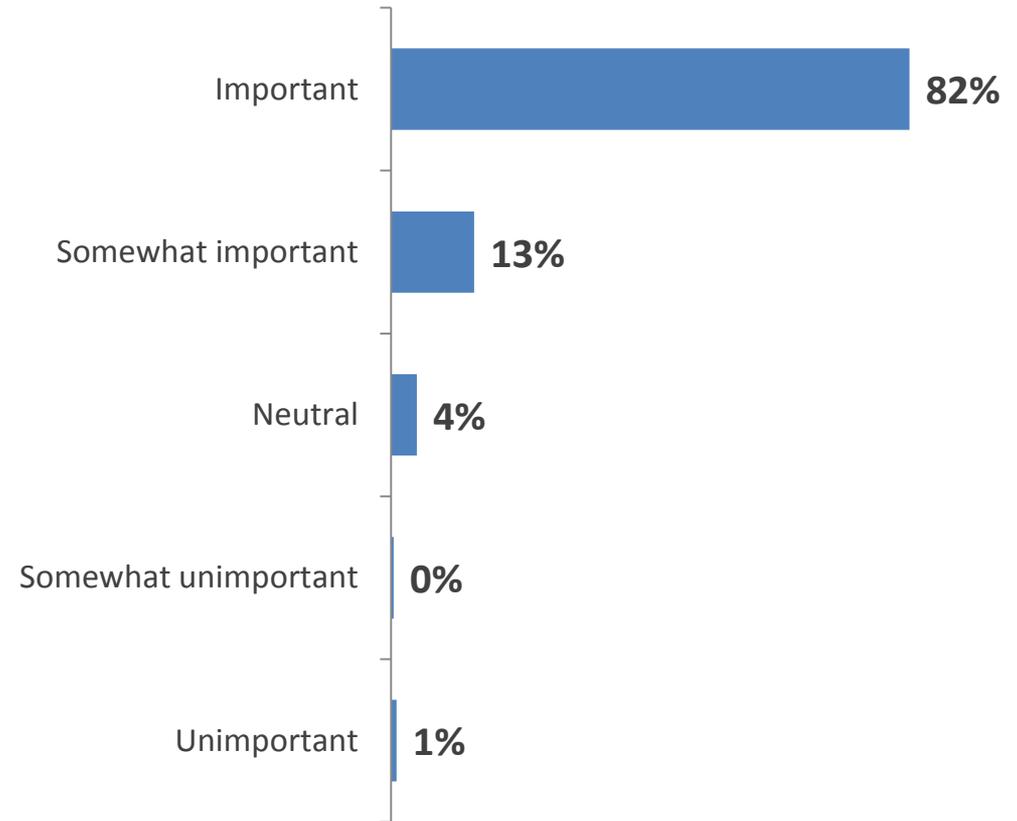
Note: No comparisons were made to the 2011 visitor research results as this question was not part of the 2011 survey.

Visitor Satisfaction: Parks & Beaches

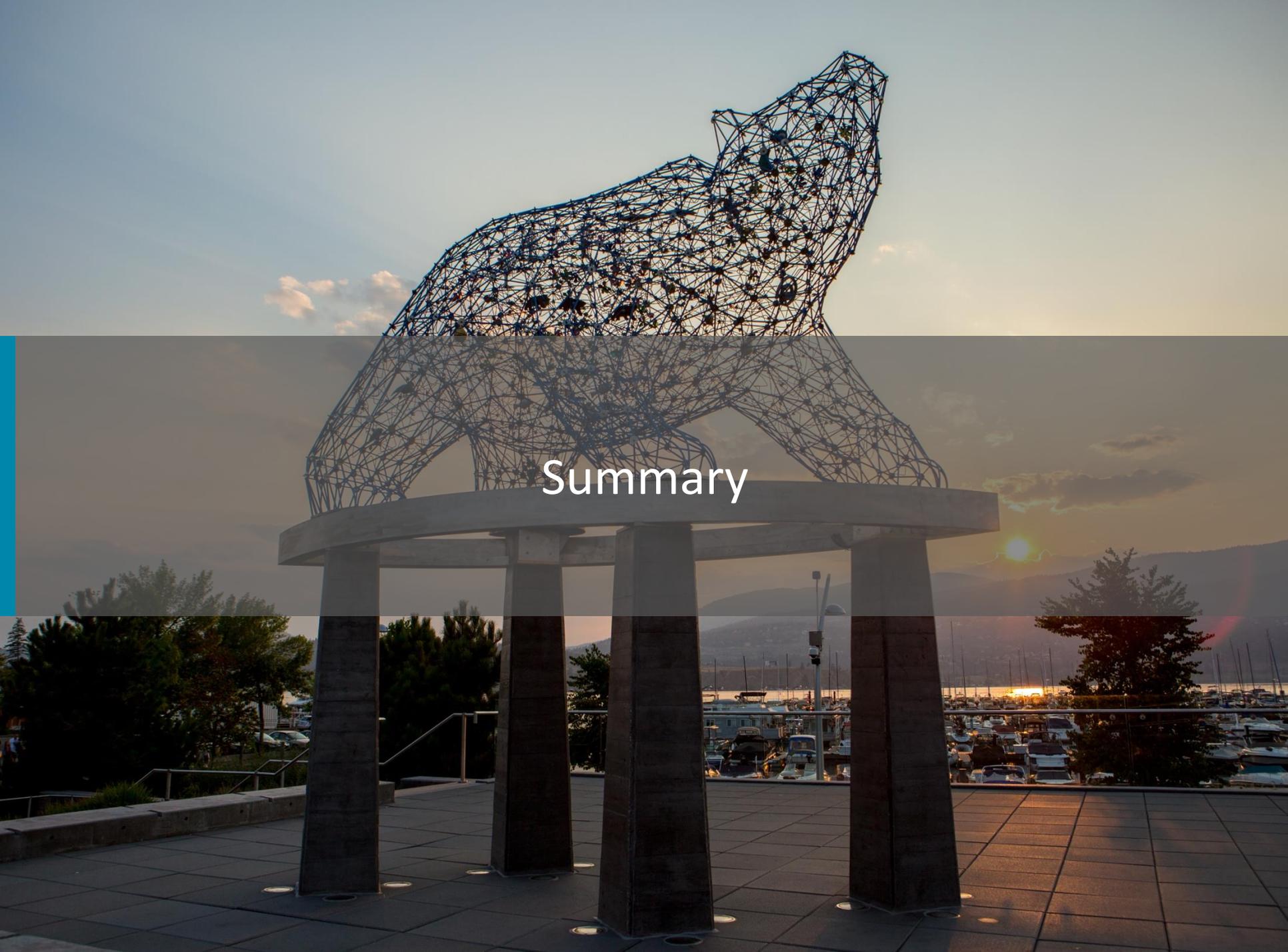
- The vast majority of visitors verified that well maintained / high quality parks and beaches are important in their decision to choose Kelowna as a place to visit.
- Eighty-two percent of visitors indicated that well maintained/ high quality parks and beaches were important factors in choosing Kelowna as their travel destination, with 13% indicating they were somewhat important.
- Four percent of visitors were neutral on the question, with 1% indicating that it was unimportant.



How important are well maintained/ high quality parks and beaches in your decision to choose Kelowna as a place to visit?



Note: No comparisons were made to the 2011 visitor research results as this question was not part of the 2011 survey.



Summary

Summary



Purpose of Trip

The majority (59%) of visitors travelled to Kelowna for a leisure/vacation break, with sight-seeing (33%), family vacation (31%), winery touring (18%) and water-based recreation and beaches (17%) the top reasons for their trip.



Area of Origin

Kelowna's visitor base continues to draw from predominantly domestic markets (82%), while the percentage share of U.S. travellers (5%) increased slightly.



Length of Trip & Travel Party Size

Visitors likely visited other locations on the same trip, spending a total of 12.4 nights away overall and 6.7 nights in Kelowna. Most visitors travelled with their spouse/partner and friends, with an average party size of 3 people.



Mode of Transportation

Although most (70%) visitors drove to Kelowna, a significant proportion of travellers (26%) flew into Kelowna via Kelowna International Airport.



Preferred Accommodations

Nearly half (47%) of visitors stayed at a hotel/motel/resort, while more than one-in-four (27%) stayed with family and friends. With the increase in vacation rental homes/condos available in Kelowna in recent years, this accommodation type accounted for 10% of all visitor stays.



Type of Activities

Kelowna has a wide-range of high-quality, in-demand activities to offer visitors, with beaches/parks/water activities (69%) the most popular set of activities pursued by visitors.

Summary



Visitor Spending

- Total average spending by all parties visiting Kelowna was \$1,370 per trip, while average spending per visitor in Kelowna was \$510. Overnight visitors spent \$240 per day, while day visitors spent \$250 on average. Accommodations (31%) and food and beverage purchases (30%) accounted for the largest categories of visitor spending.



Visitor Satisfaction

- Overall, visitors were highly satisfied with their experience in Kelowna (77% very satisfied and 22% satisfied). As a result, 61% of visitors were returning visitors to Kelowna, and visitors were likely to recommend Kelowna as a travel destination, with a Net Promoter Score of +65.

Tourism Kelowna
Visitor Intercept Survey Findings - DRAFT REPORT
November 25, 2016