



Tourism Kelowna Visitor Intercept Survey Findings All Seasons 2018 FINAL REPORT

4 March 2019

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An aerial photograph of a coastal city. In the foreground, a large, curved beach meets a calm body of water. A paved promenade runs along the water's edge. Behind the beach is a green park with trees and a small building. In the middle ground, a marina is filled with numerous sailboats. The city skyline is visible in the background, with various buildings and a large mountain range under a blue sky with scattered clouds.

Executive Summary



Executive Summary



Tourism Kelowna commissioned InterVISTAS Consulting Group to design and conduct a visitor intercept survey program in 2018, as a follow-up to the visitor survey conducted in 2016, as part of a Economic Impact Study. The objectives of the survey program were to develop updated stand alone visitor profiles and market intelligence resources, and generate updated information as a key data input into the Economic Impact Study that is being conducted in 2019. The survey collected information on Kelowna visitor characteristics, their needs and preferences, satisfaction and average expenditures, while in Kelowna.

This survey covers three seasons; the Spring, Summer and Fall. In total 1,742 surveys were completed with visitors across the three survey time frames at three locations throughout the City of Kelowna. Survey respondents were asked to provide input and comments on their entire travel party.

Executive Summary



- The majority (55%) of visitors to Kelowna in 2018 were there for leisure/vacation break, and 80% of visitors are Canadians, which is similar to 2016 results. The most popular reasons for visiting Kelowna in 2018 was sightseeing (27%), followed closely by winery touring (26%).
- Shorter vacations of 1-4 nights were the most common trip length to Kelowna. The average party size was nearly 4 people, compared to 3 people in 2016.
- Half (52%) of visitors drove to Kelowna, with a significant proportion (43%) flying into Kelowna International Airport.
- The top activities for visitors in 2018 was visiting beaches, parks or water activities and wineries.

Executive Summary



- Average total spending by all parties while in Kelowna was \$1,503, with an average total spending per person per trip of \$452. Overnight visitors to Kelowna spent on average \$144 per person per day (*i.e.*, \$531 *per person per overnight trip*), while each day visitor spent an average of \$55 per person per day. Visitors to Kelowna are typically affluent with over 38% of visitors indicating they have an annual household income of \$100,000 or more.
- Average expenditure on accommodations was \$188 per visitor compared to \$169 per visitor in 2016. Meanwhile, spending on activities, food, shopping, local transportation and other activities declined compared to 2016.
- A significant majority of visitors (95%) were either satisfied or very satisfied with their overall experience in Kelowna in 2018, compared to 99% in 2016.
- Visitors were likely to refer others to Kelowna as a place to visit, with a Net Promoter Score of +65 in 2018, this is the same as the 2016 score.

A photograph of a woman and a young girl in a field of green plants. The woman, with blonde hair in a ponytail and wearing a pink shirt, is crouching and looking at the plants. The girl, also in a pink shirt, is sitting and looking towards the woman. The background is a blurred field of green plants under a bright sky. A semi-transparent dark blue banner is overlaid across the middle of the image, containing the word 'Methodology' in white text.

Methodology

Methodology



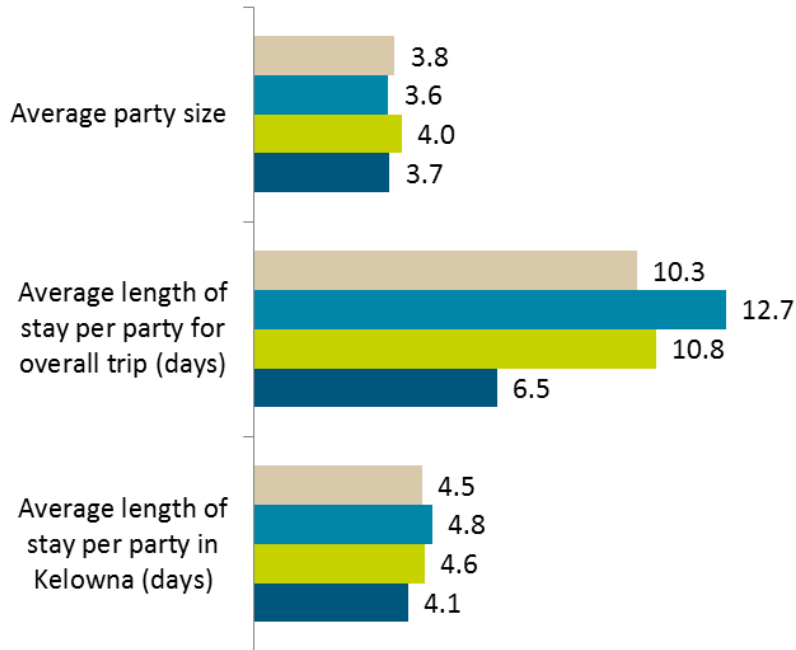
- The visitor intercept survey was conducted over three phases:
 - **Spring** (May 17 – 27, 2018)
 - 518 visitor interviews completed
 - **Summer** (July 30 – August 22, 2018)
 - 782 visitor interviews completed
 - **Fall** (September 28 – October 29, 2018)
 - 442 visitor interviews completed
- A total of 1,742 intercept surveys were completed in the Spring, Summer and Fall phases.
- Survey questions aligned with 2016 visitor survey for longitudinal comparison.



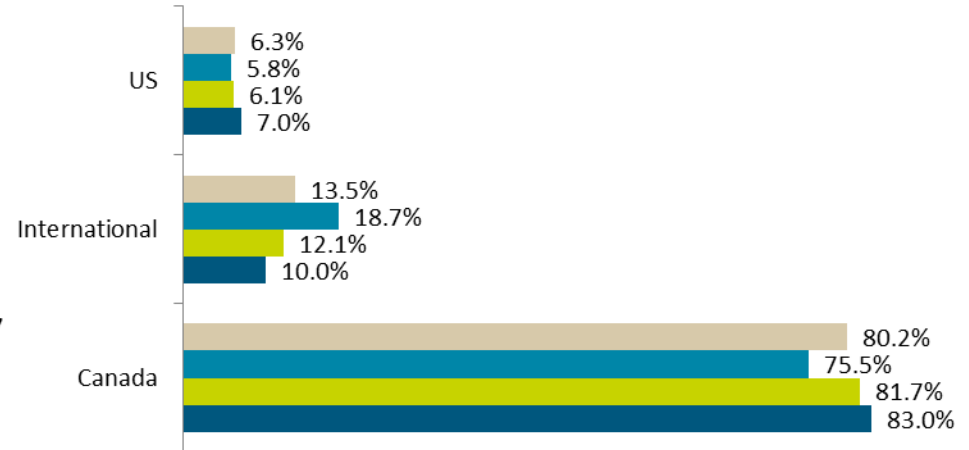
Visitor Intercept Survey Findings: Visitor Profile

Visitor Profile Overview

Overall 2018 Spring Summer Fall



Overall 2018 Spring Summer Fall



Overall 2018 Spring Summer Fall

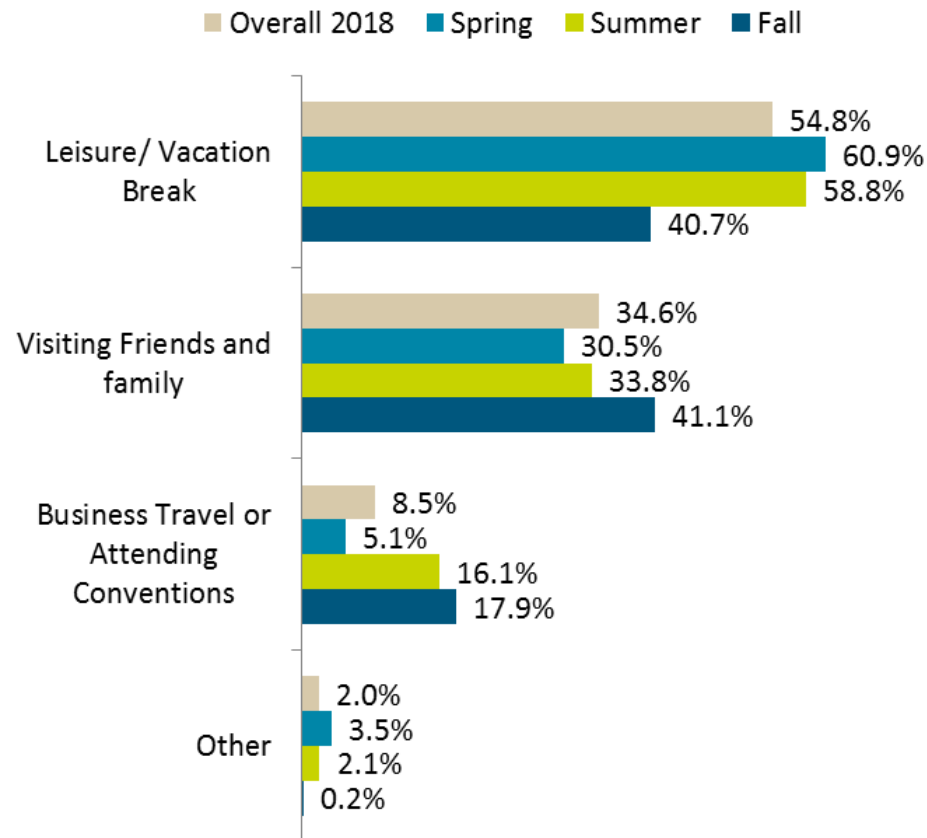


Purpose of Trip

- The majority (55%) of visitors to Kelowna in 2018 were there for leisure/vacation break. This compares to 59% in 2016.
- Over one third (35%) of respondents were in Kelowna to visit friends and family. It is interesting to note that the many visitors (41%) were in Kelowna to visit friends and family, in the Fall, a greater share than in Spring and Summer.
- Visitors on business travel or attending conventions accounted for 9% of those surveyed (similar to overall 2016). Business travel and meetings/conventions attendance was 18% in the Fall. There were more business travellers captured in the Summer 2018, than compared to 2016, as surveying took place at the airport in summer and fall 2018. Spring is traditionally the busiest time period for business travel to Kelowna; however, as surveying did not take place at the airport at that time, the proportion of business travellers may be underestimated.
- Other reasons for visiting Kelowna in 2018 included medical appointments and student exchange programs.



What is the main purpose of your trip?

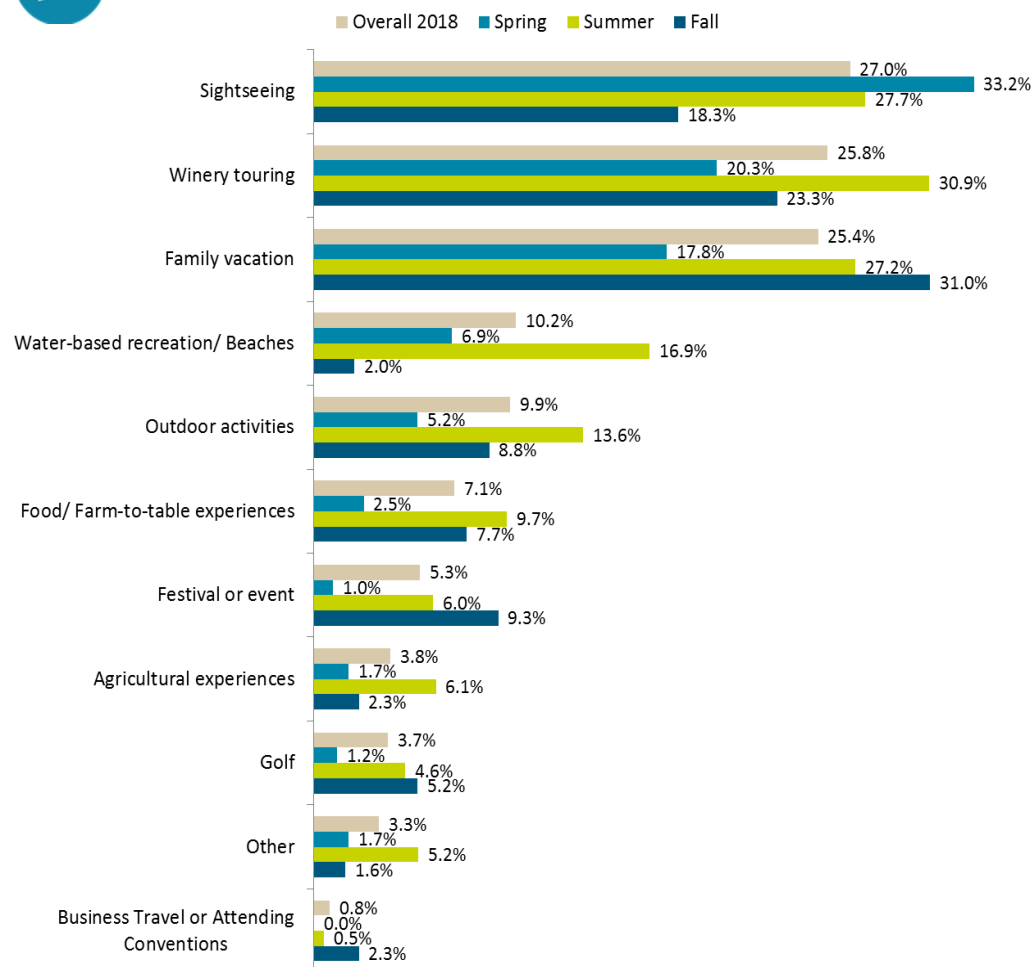


Purpose of Trip

- The top reasons for visiting Kelowna in 2018 was sightseeing (27%), followed closely by winery touring (26%). This compares to 33% and 18% for sight seeing and winery touring, respectively in 2016.
- Family vacations was the top reason for travel to Kelowna in the Fall (31%), similar to 2016 (31%).
- Water based recreation (10%) and outdoor activities (10%) were the main reasons for travel to Kelowna in Summer 2018, however, at lower response levels than in Summer 2016.
- Golf, festivals or events, business travel or attending conventions, and agricultural experiences accounted for nearly 17% of responses for all three survey time periods.



What are the top reasons for this specific trip?



Area of Origin

- Approximately four fifths of visitors to Kelowna in 2018 were from Canada (80%).
- The majority of visitors are from BC (37%), followed by 24% of visitors originating from Alberta. In 2016, visitors from BC accounted for 39% and visitors from Alberta accounted for 26%.
- Greater Vancouver accounted for the greatest share of Canadian visitors to Kelowna in 2018 at 19%, compared to Calgary (11%), Edmonton (8%) and Victoria (5%).



Where are you from?

Origin	Spring	Summer	Fall	Overall 2018
BC	38%	29%	48%	37%
Greater Vancouver	24%	18%	17%	19%
Victoria	4%	4%	7%	5%
Other BC	11%	8%	23%	13%
Alberta	19%	31%	18%	24%
Calgary	8%	13%	9%	11%
Edmonton	5%	11%	7%	8%
Other Alberta	5%	7%	2%	5%
Ontario	9%	10%	9%	9%
Other Canada	9%	11%	8%	10%
Total Canada	75%	82%	83%	80%

Area of Origin

- Other International (not incl. U.S) visitation was 13% of all visitors in 2018, this is similar to 12.4% in 2016.
- Visitor share from the Asia-Pacific region was 4% in 2018, with more visitors from the region travelling to Kelowna in the Spring and Summer time frames. This is up slightly from 2016 (3.4%).
- The visitor share from the US was 6% in 2018, with visitors from Washington State leading the way. Visitors from California was next most frequent travellers to Kelowna in 2018. U.S. visitors are up slightly from 5.4% in 2016.
- Note that these findings reflect visitor survey responses rather than be conclusive of global market patterns.



Where are you from?

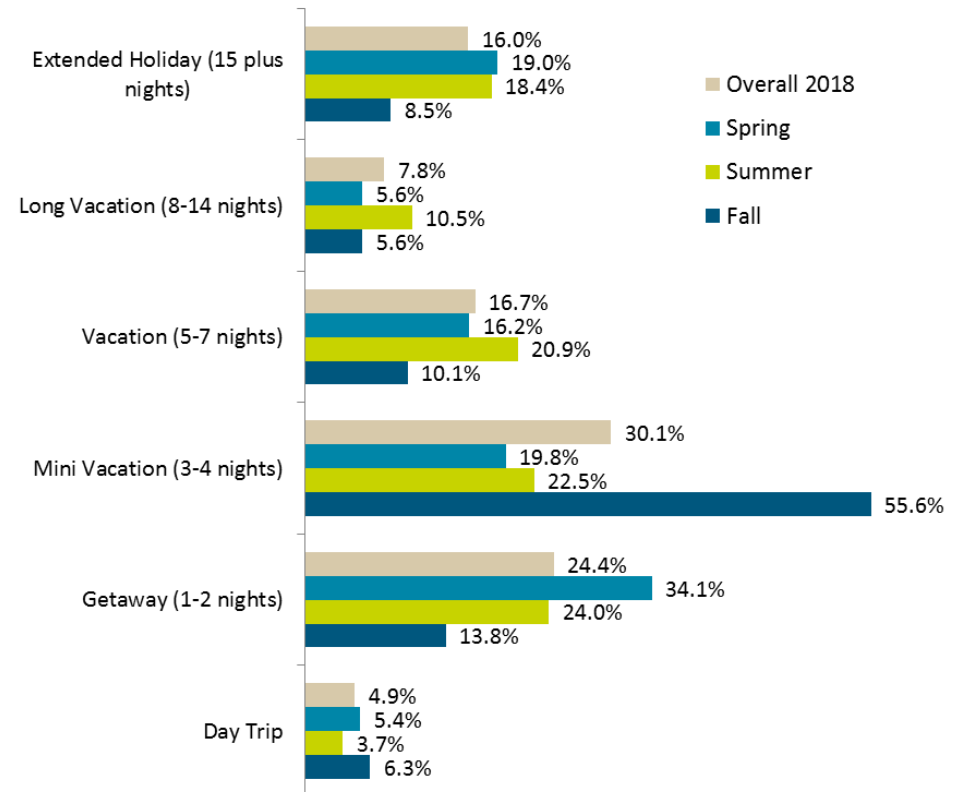
Origin	Spring	Summer	Fall	Overall 2018
WA - Washington	2%	2%	3%	2%
CA - California	1%	2%	1%	1%
TX - Texas	0%	0%	0%	0%
Other US	2%	3%	3%	2%
Total US	6%	6%	7%	6%
Asia - Pacific	5%	3%	4%	4%
United Kingdom	3%	3%	0%	2%
Germany	2%	1%	1%	1%
Other International	8%	5%	5%	6%
Total International	18%	12%	10%	13%

Length of Trip: Overall Time Away

- Mini vacations of 3-4 nights were the most popular overall trip length in 2018 (30.1%), followed by getaways of 1-2 nights (24.4%). The Mini vacation was also the most popular overall trip length in 2016 (24%).
- Day trips declined in 2018 to 4.9%, compared to 8.1% in 2016. *Please interpret the data on day trips with caution, due to small sample sizes in 2018. There were 82 survey responses in total.*
- Extended holidays that span more than 15 days accounted for nearly 16.0% of overall visitor trip lengths in 2018, this is down slightly from 2016 (17.5%) levels. Long vacations of 8-14 nights accounted for 7.8% over visitors surveyed in 2018, which is also down from 2016 (11.3%).



How many nights are you away from home on this trip? (Note that respondents were asked to comment on their overall trip length, not just their stay in Kelowna.)

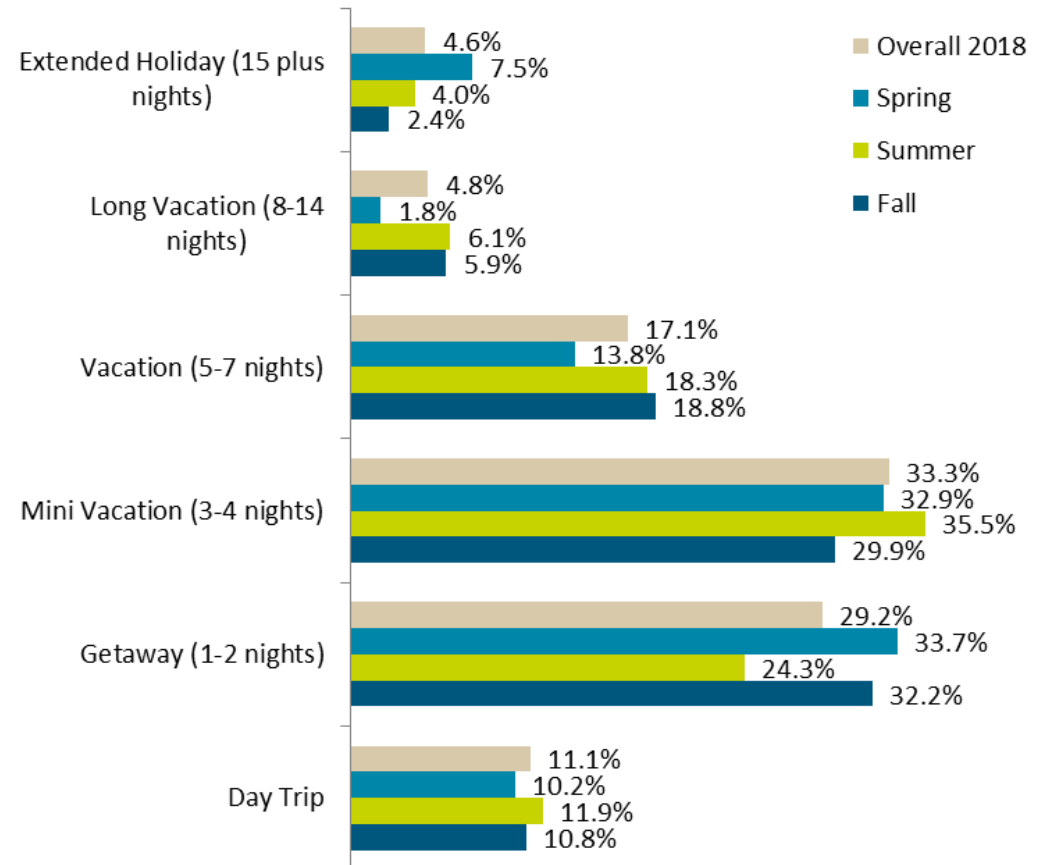


Length of Trip: Nights in Kelowna

- Mini vacations of 3-4 nights were the most popular to Kelowna in 2018 (33%), compared to 25% in 2016. This is followed by getaways of 1-2 nights (29%), compared to nearly 26% in 2016.
- Day trips were steady through all three survey time periods, accounting for approximately 11%. *Please interpret the data on day trips with caution, due to small sample sizes in 2018, 82 survey responses in total.*
- Long vacations of 8-14 nights were more prevalent in the Summer (6.1%) and Fall (5.9%) time periods to Kelowna. Extended holidays that span more than 15 days accounted for just under 5% of all visitors in 2018, this is down from 2016 (7.3%).



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

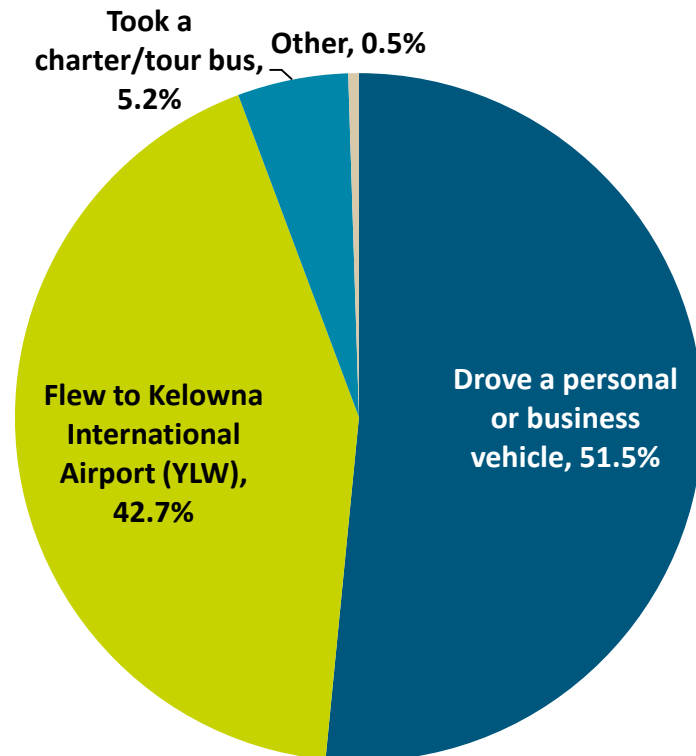


Mode of Transport to Kelowna

- Half of the survey responses indicated that their party drove a personal or business vehicle to Kelowna in 2018, this is less than 2016 (70%). The average party size for visitors indicating use of a personal or business vehicle was 3.8 people.
- Partly reflecting the introduction of interviewers at Kelowna International Airport in 2018, the share of respondents flying accounted for nearly 43%. More visitors flew in the Fall, compared to Spring and Summer time periods.
- Surveys that indicated taking charter/tour bus accounted for 5.2% of all survey responses in 2018, up slightly from 4.3% in 2016. The average party size of for those surveys that indicated taking charter/tour bus was 16 people across all survey time periods in 2018.



On this trip, how did you get to Kelowna?

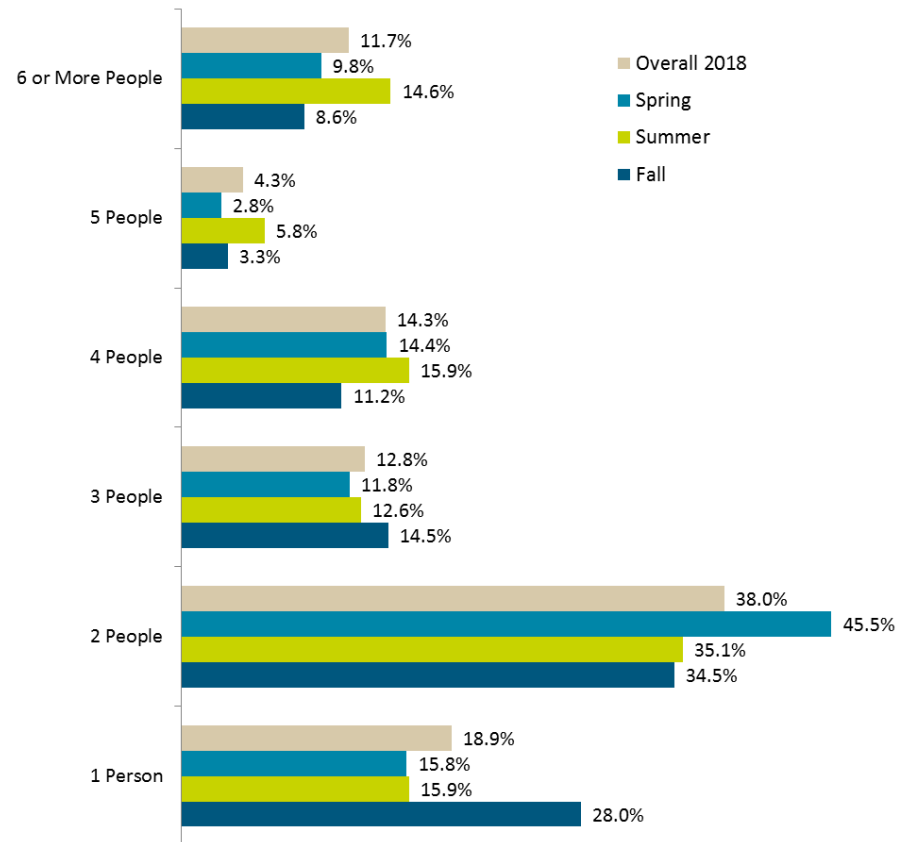


Travel Party Size

- Party sizes of two people were the most common in 2018 (38%), down from 43% in 2016.
- Party sizes of 2, 3, and 5 people all reported lower proportions in 2018 than compared to 2016 and 2011. However there were more visitors indicating party sizes of 6 or more people in 2018 than compared to 2016. *This is consistent with a higher proportion of visitors surveyed that indicated traveling with a tour group.*
- The proportion of people travelling alone increased to 19% in 2018, compared to 16% in 2016. There was a greater proportion of single travellers in the Fall than compared to Spring and Summer 2018.
- The average party size in 2018 was 3.8 people, this compares to an average party size of 3.0 in 2016. Again, the increased presence of tour groups travelling to Kelowna is impacting the average party size metric.



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

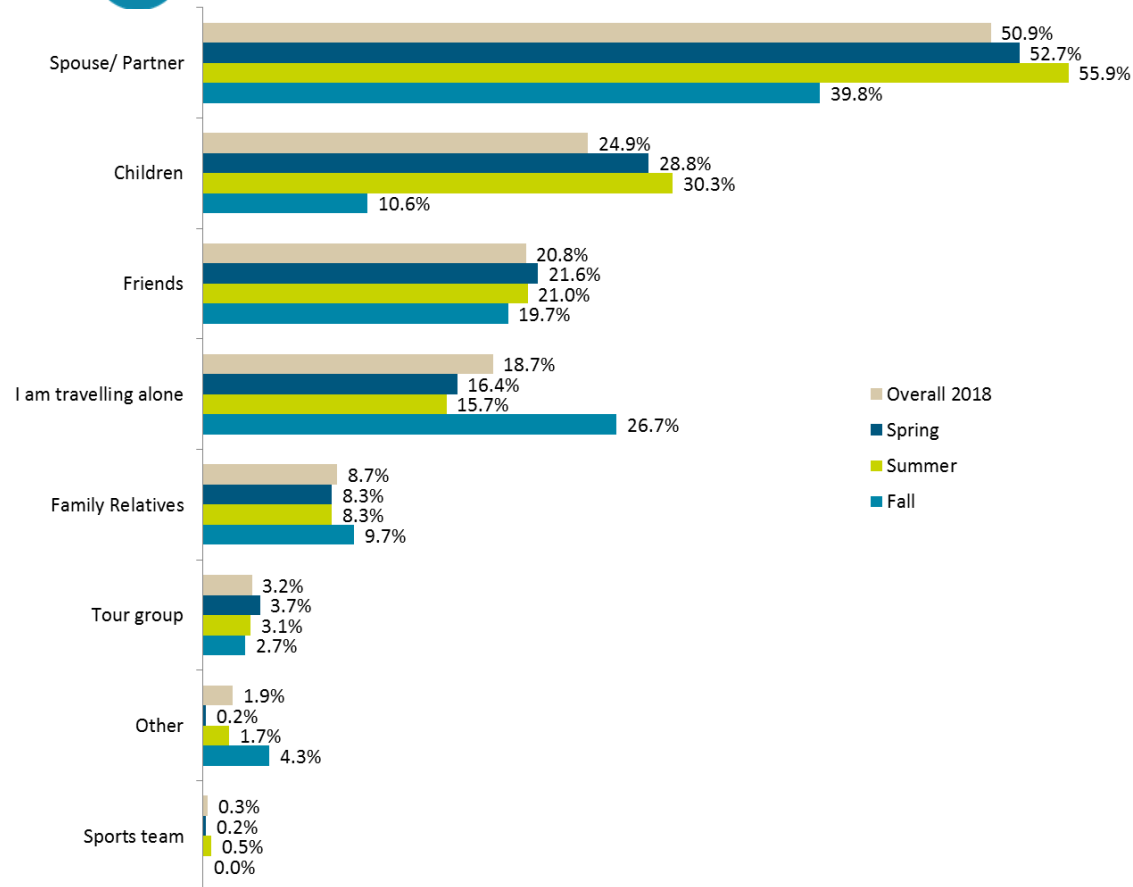


Travel Party Type

- The common travel companions of visitors were their spouse or partner, accounting for more than half (51%) of respondents in 2018. This is down slightly from 56% in 2016.
- Children accounted for 25% of travel companions in 2018, higher than 2016 (19%). Respondents travelling with other types of family relatives accounted for 9% of visitors.
- Approximately 19% of people travelled to Kelowna alone in 2018.
- A total of 3.2% of the surveys completed indicated travelling with a tour group. The total number of visitors covered by tour group accounted for over 1,300 visitors.
- The remaining survey responses indicated travelling a sports team or “other” typically comprised business colleagues in 2018, comprising 2.2%.



Who are you travelling with on this trip?

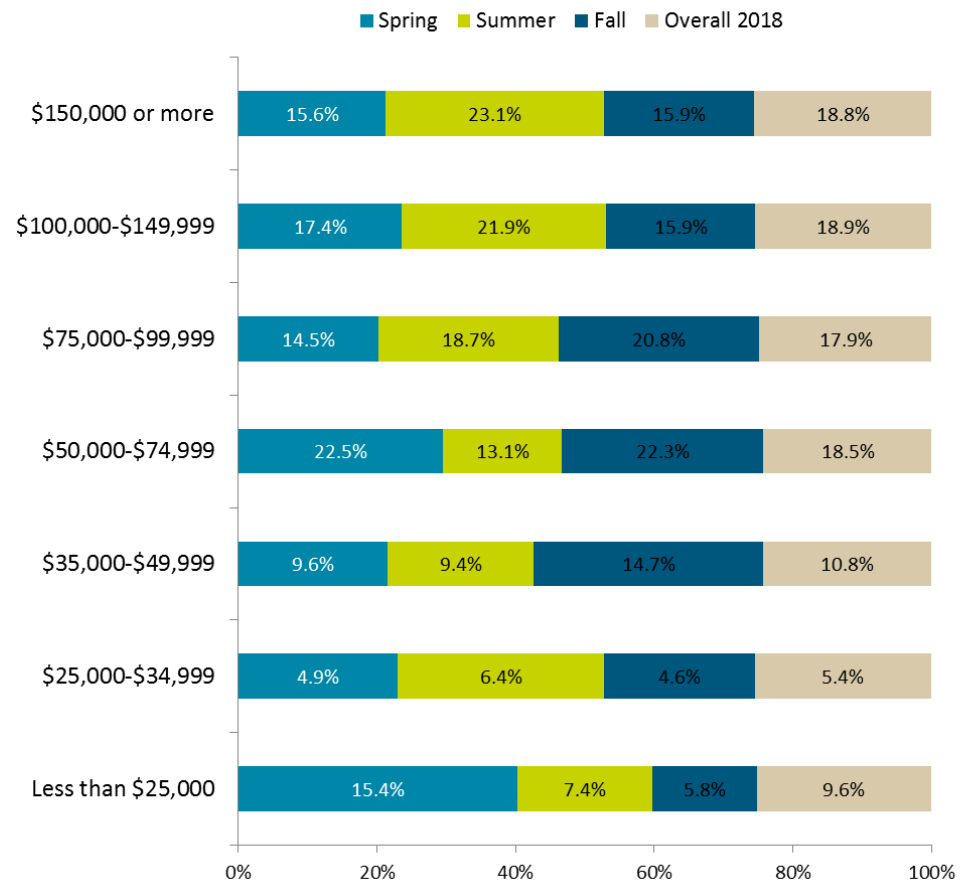


Travel Party Incomes

- Kelowna attracts a significant proportion of visitors from higher income households. Nearly 38% of respondents reported a household income of \$100,000 or more in 2018. A total of 1,360 survey responses (out of 1,742 survey completions) provided an answer to the question on income.
- In total, over a quarter of respondents had a household income of \$49,999 or less (26%).
- 64% of visitors with household incomes of \$75,000 or more travelled in the Summer, compared to 53% in the Fall for the same income brackets.



In what broad category does your household income fall?

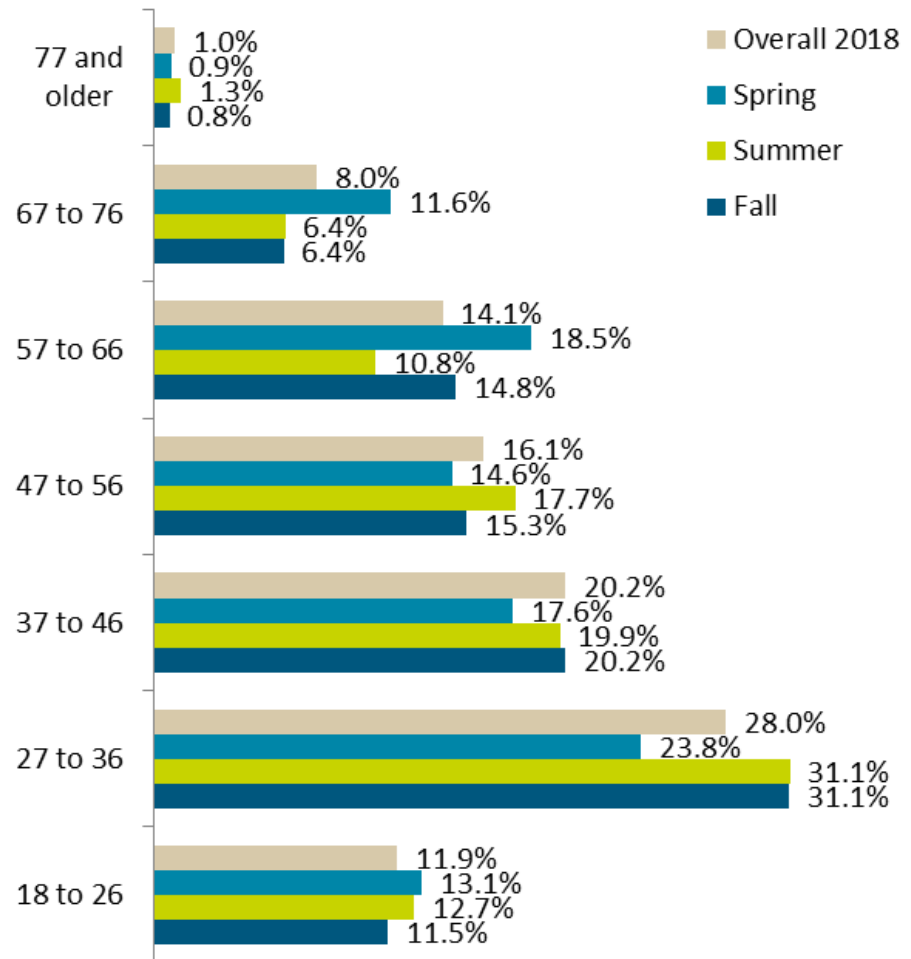


Visitor Respondent Age

- With its diverse activities and accommodation offer, Kelowna attracts a variety of demographics.
- Visitors are predominantly aged 46 and under, accounting for 60% of respondents, most respondents were aged 27 to 36 (28%), with most travelling in the Summer and Fall in 2018.
- Over 39% of visitors were 47 and over.



In what year were you born?

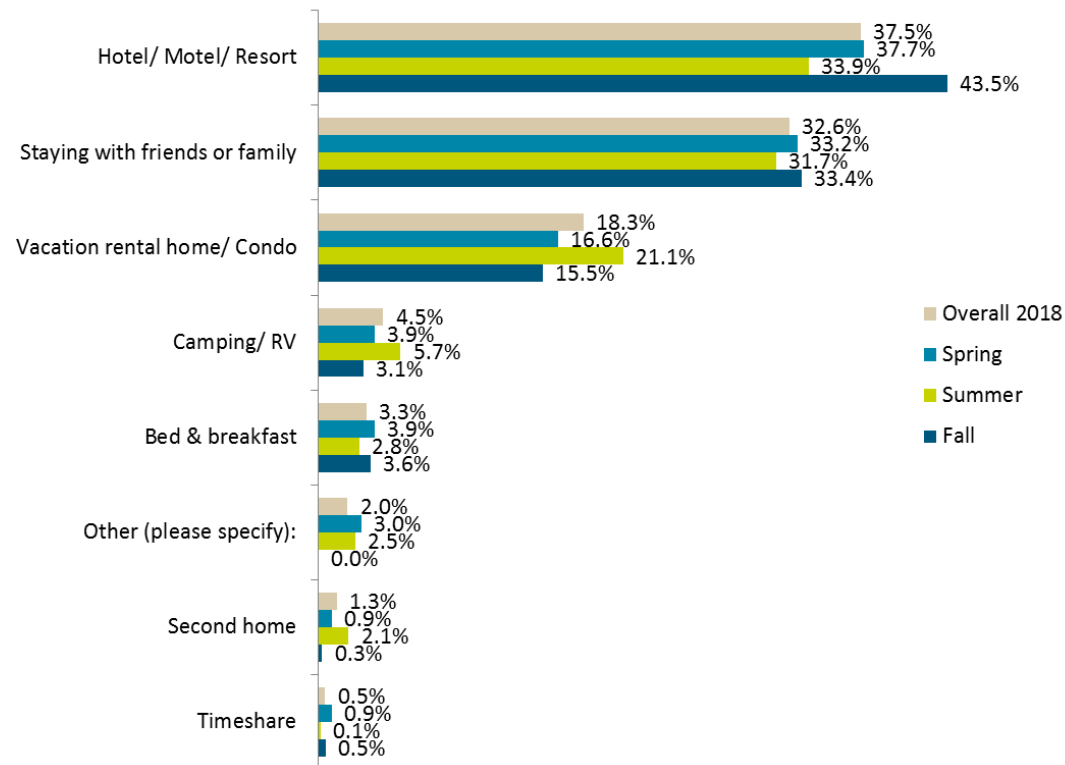


Preferred Accommodations

- The proportion of visitors staying in a hotel, motel or resort declined from 48% in 2016 to 38% in 2018, though it remained the most common accommodation choice.
- Staying with friends and family was the next most common response at 33 %, up from 27% in 2016.
- Vacation rental homes/condos increased in popularity from 2016 to 2018 (10% to 18% respectively). *It appears that the decline in hotel, motel and resort stay has been made up with the increase use of vacation rental home/condo.*
- The proportion of visitors indicating staying in a Bed & breakfast was 3% in 2018, compared to 6% in 2016.
- A total of 2% of visitor surveys indicated “other”, this category covered university campus, shared accommodations unit and a host family.



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

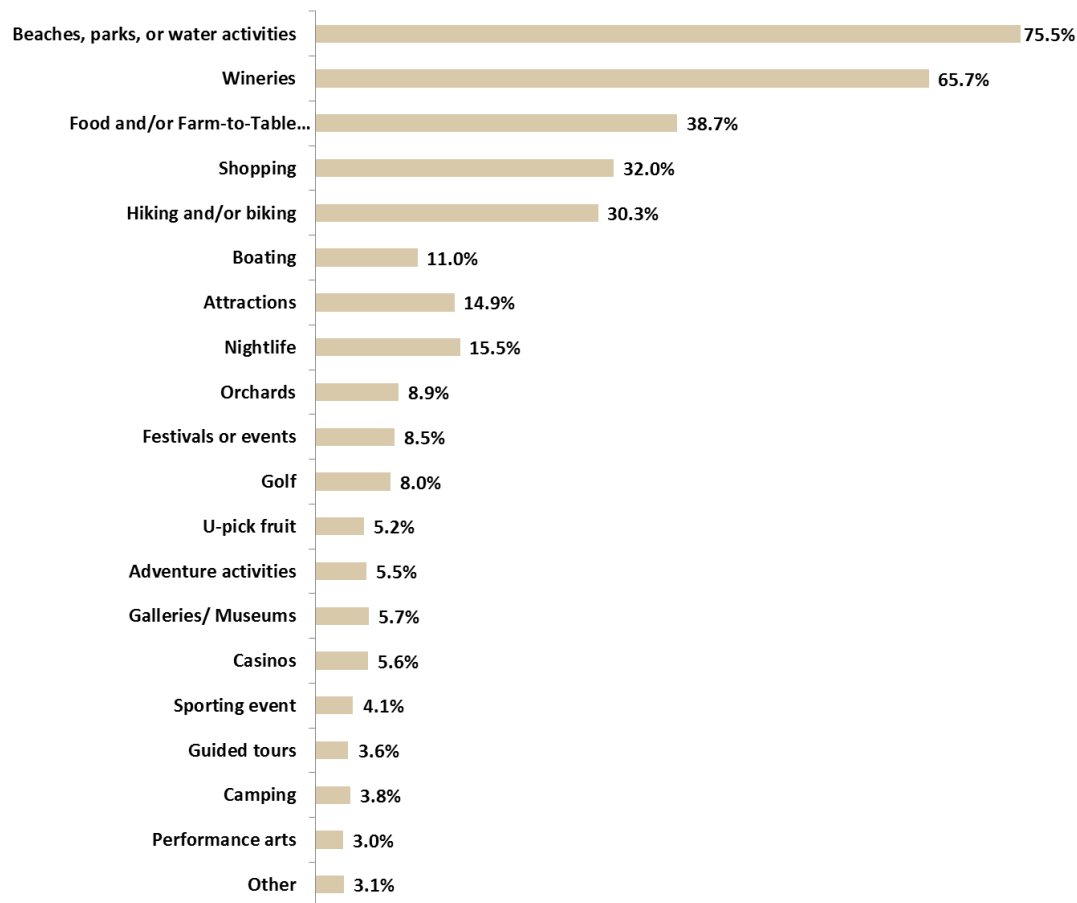


Type of Activities Planned/Participated In

- Beaches/parks/water activities were the most popular activities visitors are planning to participate in or have participated in while visiting Kelowna in 2018 (76%), this compares to 69% in 2016.
- The popularity of wineries was also very strong at 66%. As referenced previously, the large increase in wineries is likely influenced by surveying that took place at Summerhill in 2018 and not in 2016.
- Food and farm to table experiences, orchards, and U-pick fruit activities all showed increases in popularity from 2016 to 2018.
- Many activities were notably less popular in 2018 than 2016, such as shopping, boating, attractions, festivals and events, adventure activities, galleries/museums and casinos.
- Participation in certain outdoor activities were affected during the summer time period due to the smoke in the area from the wildfires.



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



Type of Activities Planned/Participated In



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

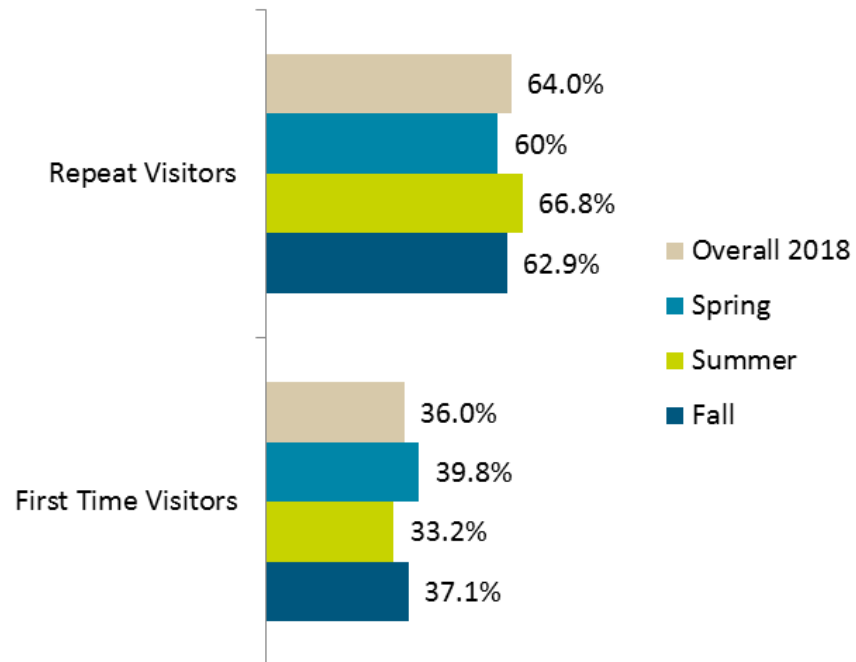
Activity	Spring	Summer	Fall	Overall 2018
Other	3%	4%	3%	3%
Performance arts	3%	3%	3%	3%
Camping	5%	4%	5%	4%
Guided tours	2%	4%	2%	4%
Sporting event	4%	4%	5%	4%
Casinos	5%	5%	5%	6%
Galleries/ Museums	5%	5%	6%	6%
Adventure activities	5%	6%	5%	6%
U-pick fruit	2%	8%	2%	5%
Golf	6%	10%	7%	8%
Festivals or events	5%	11%	6%	8%
Orchards	5%	12%	5%	9%
Nightlife	14%	14%	17%	15%
Attractions	16%	14%	19%	15%
Boating	8%	18%	9%	11%
Hiking and/or biking	34%	28%	40%	30%
Shopping	27%	31%	32%	32%
Food and/or Farm-to-Table Experiences	36%	35%	42%	39%
Wineries	71%	64%	83%	66%
Beaches, parks, or water activities	68%	68%	80%	75%

Repeat Visitation

- Repeat visitation increased from 2016 (61%) to 2018 (64%).
- The proportion of first time visitors to Kelowna decreased from 39% in 2016 to 36% in 2018.
- Repeat visitation was highest during the Summer, whereas more first time visitors to Kelowna, did so in the Spring.



Is this your first trip to Kelowna?





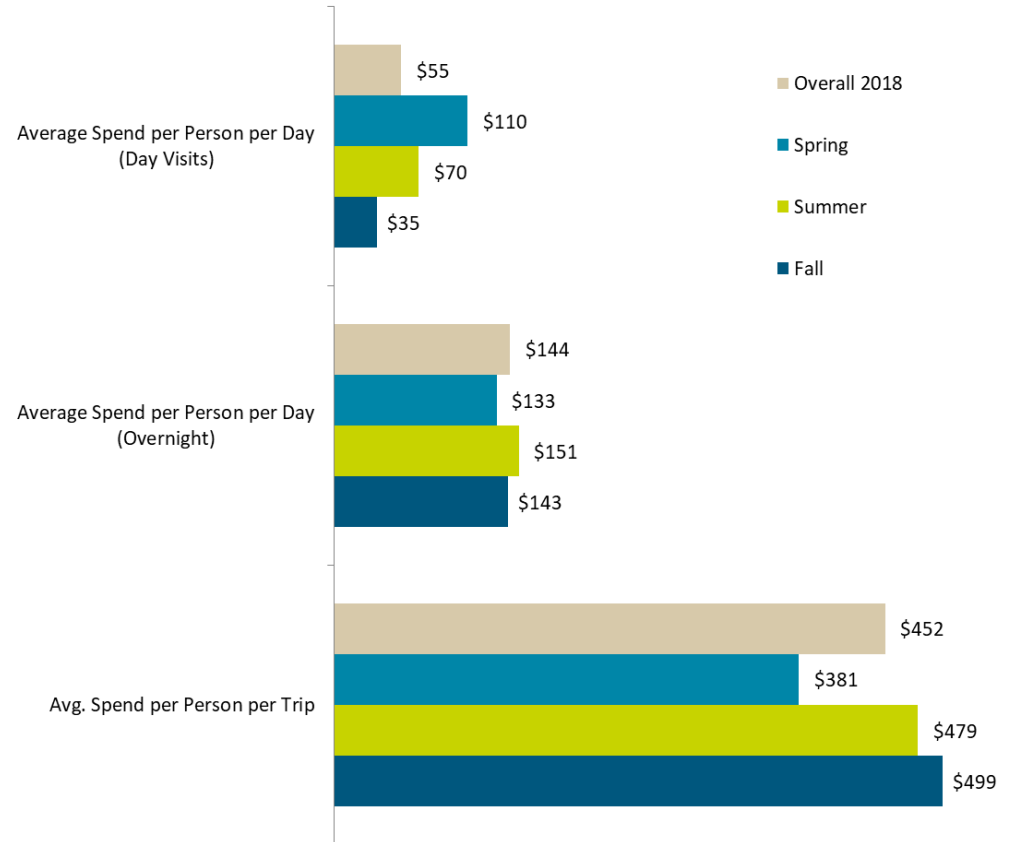
Visitor Intercept Survey Findings: Visitor Spending

Total and Average Spending

- The total average spending by visitor parties in 2018 was \$1,503. Visitor parties in the Summer was the highest with an average of \$1,769 per party per trip.
- Average spending per person per trip (*i.e., including overnight visitors and day trippers*) was \$452, in 2018. The average was highest for visitors in the Fall.
- Each overnight visitor party spent an average of \$1,603 per trip in 2018. Spend was lowest for those travelling in the Spring.
- The average spending per person per day for overnight visitors is \$144 in 2018 compared to \$90 in 2016. Note that the average length of stay for overnight visitors in 2018 was 3.7 days compared to 6 days in 2016.
- The average spending per person per day for day trips was \$55 in 2018.



Total spending per party and per person

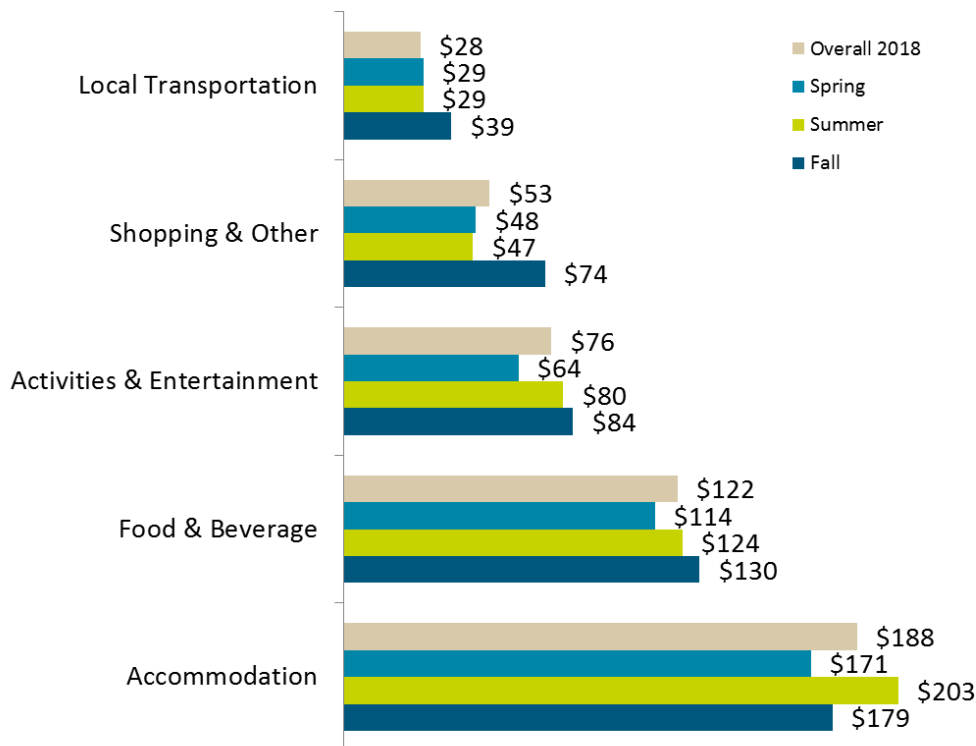


Spending by Category

- Per visitor spending on accommodation in 2018 increased compared to 2016 (\$188 and \$169 respectively).
- Also, spending on activities & entertainment, shopping & other, and local transportation all decreased from 2016 to 2018.
- Spending on average food & beverage per person per trip was slightly less in 2018, than compared to 2016 (\$122 and \$149 respectively).



Average per trip Spending by Category per Visitor





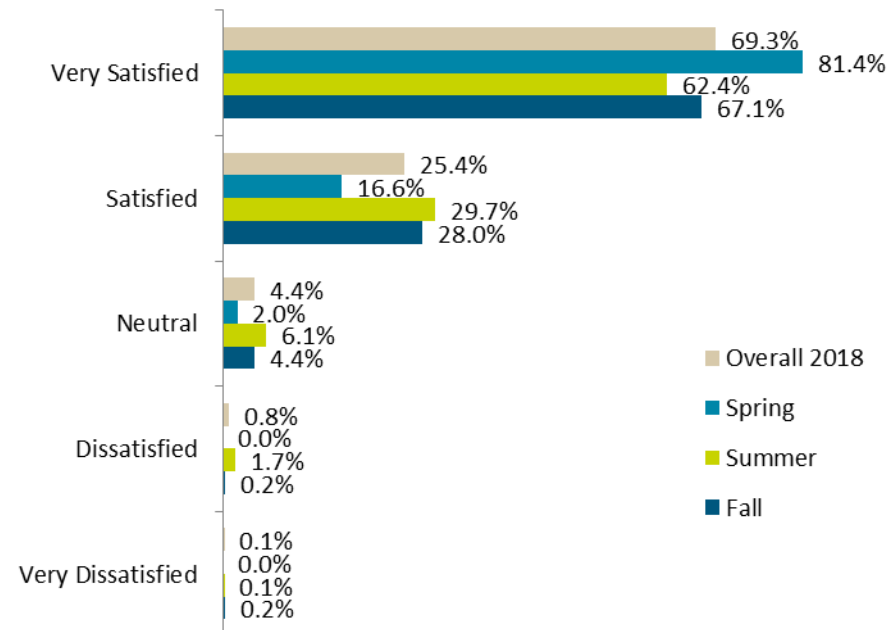
Visitor Intercept Survey Findings: Visitor Satisfaction

Visitor Satisfaction: Overall Experience

- Overall, visitors were highly satisfied with their time spent in Kelowna. Approximately 95% of visitors were either very satisfied or satisfied with their Kelowna destination experience in 2018.
- Visitors to Kelowna in the Spring indicated the highest level of satisfaction, as 98% indicated that they were either very satisfied or satisfied.
- 1.7% of visitors indicated that they were dissatisfied with their overall experience during Summer 2018. This could have been due in part to the smoke from wild fires that were burning in the Kelowna area.



How satisfied are you with your overall experience in Kelowna?



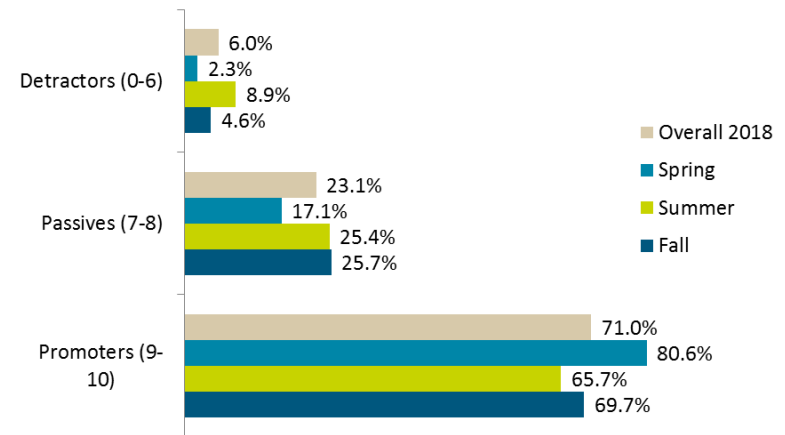
Visitor Referral and Net Promoter Score

- The sample size for 2018 was 1,742 surveys.
- Promoters (those indicating a 9 or 10 on the 10-point scale, with 10 being the highest) comprised 71.0% in 2018. The proportion of Promoters has increased compared to 2016.
- The share of responses from passives (those indicating a 7 or 8 on the 10-point scale) was 23% in 2018.
- Detractors (those indicating a response of 6 and below on the 10-point scale) accounted for 6.0% of responses in 2018.



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

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



Visitor Referral and Net Promoter Score

- The sample size for 2018 was 1,742 surveys.
- Visitors were likely to refer others to Kelowna as a place to visit, with a Net Promoter Score of +65 in 2018, this is the same as the 2016 score.
- While there is no publicly available research that benchmarks Net Promoter Scores of visitor destinations, comparisons can be made to businesses and industries associated with the broader tourism industry and InterVISTAS' project experience. Service and travel oriented businesses such as airlines, hotels and travel companies typically achieve NPSs of 40 to 50, and scores of 45 are considered by InterVISTAS to be an appropriate guide for visitor destination organisations and the locations they represent.



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

Net Promoter Score (2018):

- ***Overall: +65***
- ***Spring: +78.3***
- ***Summer: +56.8***
- ***Fall: +65.1***



Summary

Summary



Purpose of Trip

The majority (55%) of visitors to Kelowna in 2018 were there for leisure/vacation break. The most popular reasons for visiting Kelowna in 2018 was sightseeing (27%), followed closely by winery touring (26%) the top reasons for their trip.



Area of Origin

Kelowna's visitor base continues to draw from predominantly domestic markets (80%), though international markets were significantly more represented than U.S. (13% and 6% respectively).



Length of Trip & Travel Party Size

Shorter vacations of 1-4 nights were the most common trip length to Kelowna. The average party size was nearly 4 people, up from 3 in 2016.



Mode of Transportation

Half (52%) of completed surveys indicated that their party drove to Kelowna, with a significant proportion (43%) flying into Kelowna International Airport.



Preferred Accommodations

More than a third (38%) of visitors stayed at a hotel/motel/resort in Summer 2018, while nearly as many (33%) stayed with family and friends. Approximately 18% of visitors stayed a vacation rental home/condo in Kelowna in 2018.



Type of Activities

The top activities for visitors in 2018 was visiting beaches, parks or water activities and wineries.

Summary



Visitor Spending

- Average total spending by all parties while in Kelowna was \$1,503, with an average total spending per person per trip of \$452. Overnight visitors to Kelowna spent on average \$144 per person per day, while each day visitor spent an average of \$55 per person per day. Visitors are typically affluent with nearly 38% of visitors indicating having an annual household income of \$100,000 or more.
- Average expenditure on accommodations was \$188 compared to \$169 in 2016. Meanwhile, spending on activities, shopping and local transportation dropped compared to 2016.



Visitor Satisfaction

- A significant majority of visitors (95%) were either satisfied or very satisfied with their overall experience in Kelowna.
- Visitors were likely to refer others to Kelowna as a place to visit, with a Net Promoter Score of +65 in 2018.

Tourism Kelowna
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