



InterVISTAS

a company of Royal HaskoningDHV

Tourism Kelowna
Visitor Interview Survey Findings
All Seasons 2022/23
FINAL REPORT

5 March 2024

InterVISTAS

a company of Royal HaskoningDHV

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An aerial photograph of a coastal city. In the foreground, a large, curved park area with green lawns and trees borders a sandy beach and a body of water. A marina filled with numerous sailboats is visible in the middle ground. The city's buildings, including several high-rise structures, are situated behind the park. In the background, a range of mountains stretches across the horizon under a blue sky with scattered white clouds.

Executive Summary



Executive Summary



Tourism Kelowna commissioned InterVISTAS Consulting to design and conduct a visitor survey program in 2022/23, as a follow-up to the visitor survey conducted in 2016 and 2018, as part of an Economic Impact Study. The objectives of the survey program were to develop updated standalone visitor profiles, market intelligence resources and generate updated information as a key data input into the Economic Impact Study that was conducted in 2023. The survey collected information on Kelowna visitor characteristics, their needs and preferences, satisfaction and average expenditures, while in Kelowna.

This survey covers four seasons; the Spring, Summer, and Fall 2022 seasons, as well as Winter 2023. The employment survey was conducted during Spring 2023, and visitor volumes for 2022 provided by Tourism Kelowna on Central Okanagan District visitor highlights by TELUS Insights and Environics.

Executive Summary



➤ The majority (61%) of visitors to Kelowna in 2022/23 were there for leisure/vacation break, and 80% of visitors are Canadians, which is similar to 2018 results. The most popular reasons for visiting Kelowna in 2022/23 was family vacation (32%), followed by sightseeing (18%).

➤ Shorter vacations of 1-4 nights were the most common trip length to Kelowna. The average party size was nearly 3 people, which is a reduction in the nearly 4 people in 2022/23.

➤ Half (52%) of visitors drove to Kelowna, with a significant proportion (40%) flying into Kelowna International Airport.

➤ The top activities for visitors in 2022/23 were visiting beaches, parks or water activities, outdoor activities and wineries.

Executive Summary

- Average total spending by all parties while in Kelowna increased to **\$1,577** in 2022/23 compared to **\$1,503** in 2018. On the other hand, the average total spending per person per trip saw a minimal increase to **\$476** from **\$452** in 2018.
- Overnight visitors to Kelowna spent on average **\$79** per person per day, while each day visitor spent an average of **\$141** per person per day. Visitors to Kelowna are typically affluent with over **48%** of visitors indicating they have an annual household income of **\$100,000 or more**.
- Average expenditure on accommodations was **\$171** per visitor compared to **\$188** per visitor in 2018. Meanwhile, spending on activities, food, shopping, local transportation and other activities declined compared to 2018. This spending profile suggests a lower propensity to spend on discretionary activities in favor of more budget-friendly options.
- A significant majority of visitors (**93%**) were either satisfied or very satisfied with their overall experience in Kelowna in 2022/2023, compared to **95%** in 2018.
- Visitors were likely to refer others to Kelowna as a place to visit, with a Net Promoter Score of **+69** in 2022/23, four points higher than the score awarded in 2018.



Executive Summary

- While average per person trip spending increased in 2022/23 compared to 2018, the change in spending profile is notable suggesting less spend on discretionary activities and more formal accommodations in favor of more budget-friendly options.
- Repeat visitation declined slightly by 5%, which suggests some proportion of visitors are opting for different experiences and may have exhausted Kelowna's broad offerings in prior trips.
- However, the proportion visitors indicating that they were either satisfied or very satisfied with Kelowna's offerings remains high, despite a slight drop from 95% in 2018 to 93% in 2022/23.
- Visitors in 2022/23 were increasingly likely to recommend Kelowna to friends or colleagues as a tourist destination of choice.



Key Metrics – 2022/23 vs 2018

Visitation Metrics	2018	2022/23
Average Spend per Person per Trip	\$452	\$476
Repeat Visitation	64%	59%
% of Satisfied & Very Satisfied Visitors	95%	93%
NPS Score	+65	+69

A photograph of a woman and a young girl in a field of green plants. The woman is on the left, wearing a pink shirt, and the girl is on the right, also wearing a pink shirt. They are both looking at each other and smiling. The word "Methodology" is overlaid in white text in the center of the image. The background is a blurred field of green plants under a bright sky.

Methodology

Methodology



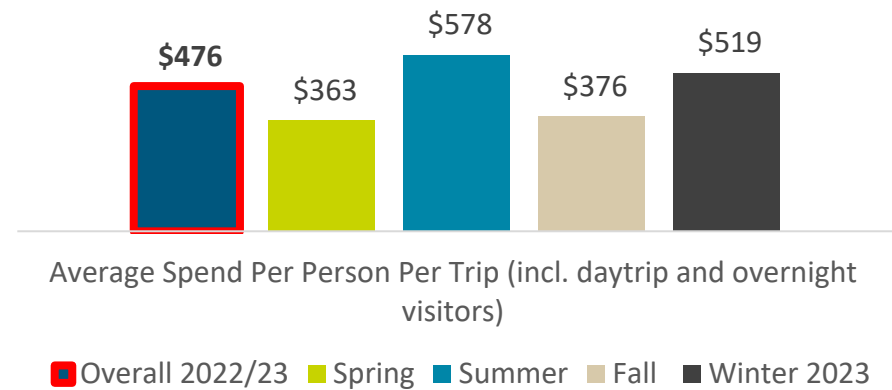
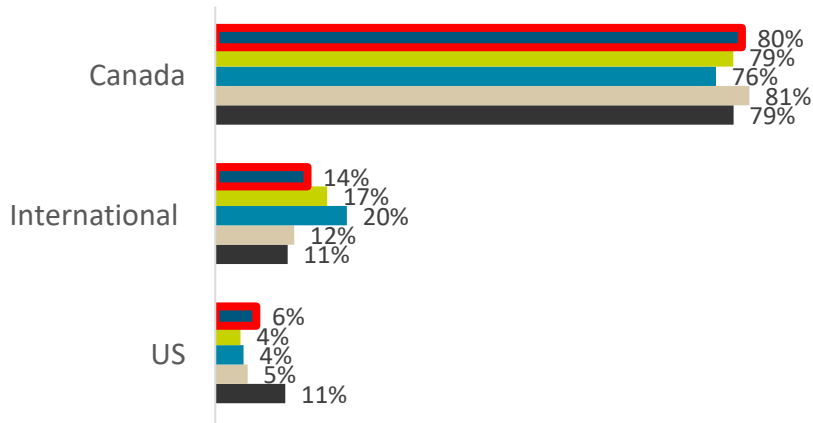
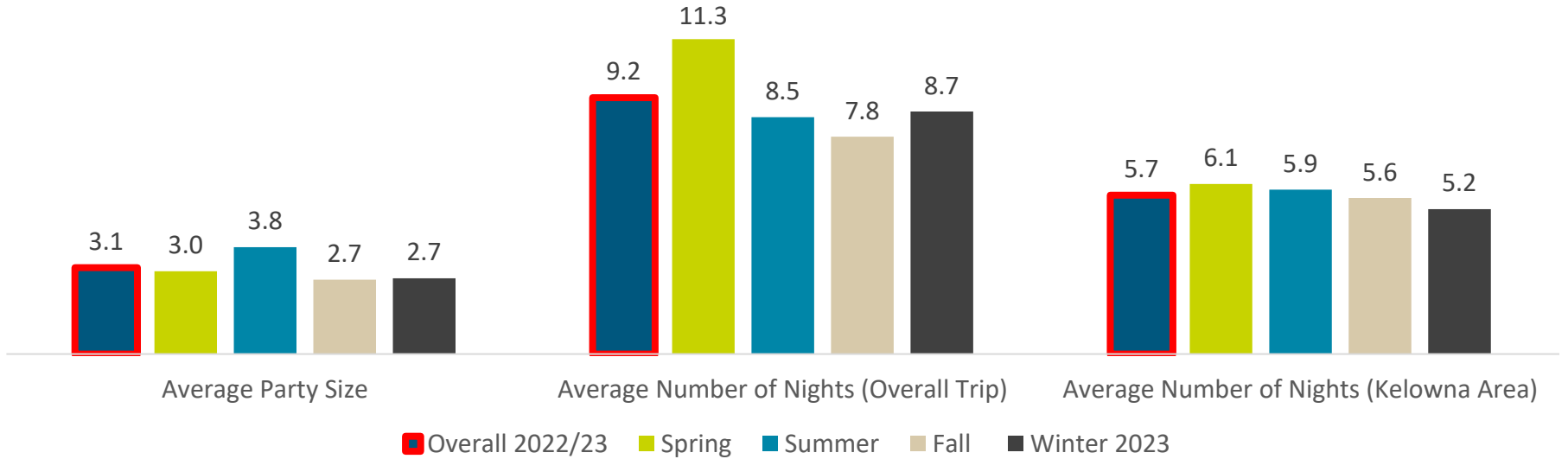
- The visitor intercept survey was conducted over four phases:
 - **Spring** (June 17 – 26, 2022)
 - 556 surveys completed
 - **Summer** (July 27 – September 28, 2022)
 - 345 surveys completed
 - **Fall** (September 29 – October 28, 2022)
 - 277 surveys completed
 - **Winter** (March 13 – March 31, 2023)
 - 409 surveys completed
- A total of **1,587** surveys were completed in the Spring, Summer, Fall and Winter phases, of which 675 self-identified as visitors/tourists to the region.
- Survey questions aligned with 2018 visitor survey for longitudinal comparison with a section added to measure Travel Influences Post Pandemic.



Visitor Interview Survey Findings: Visitor Profile



Visitor Profile Overview



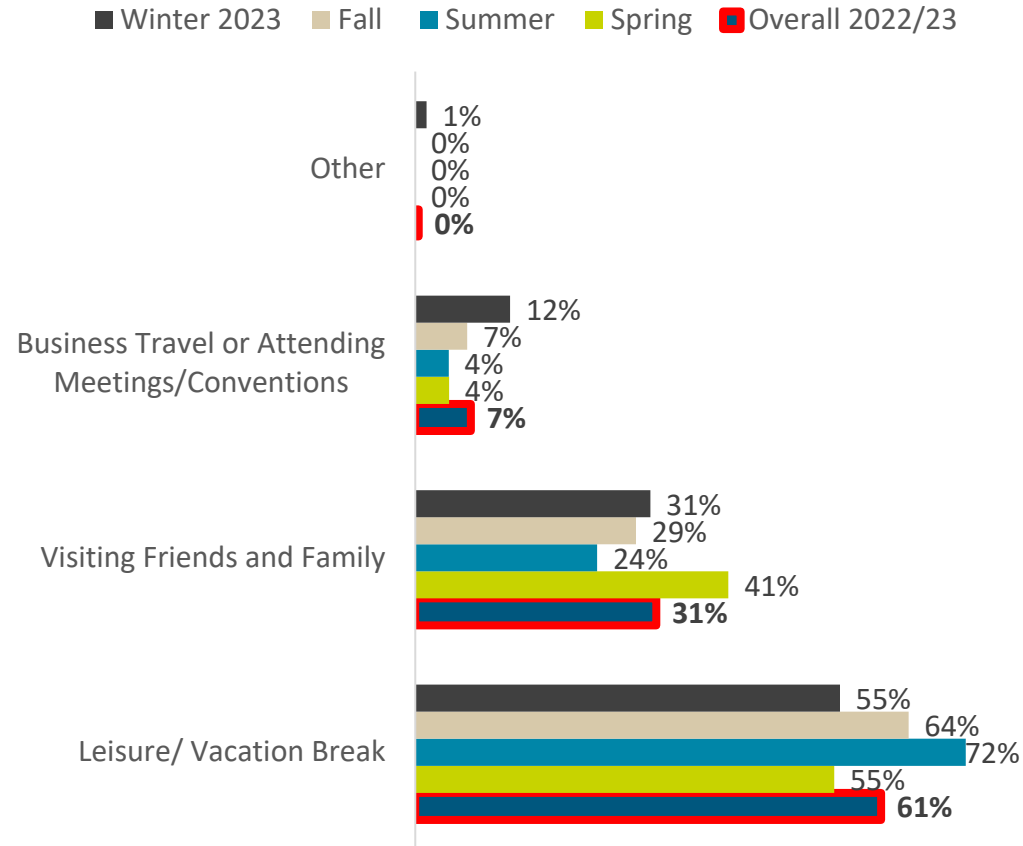
Overall 2022/23 Spring Summer Fall Winter 2023

Purpose of Trip

- The majority (61%) of visitors to Kelowna in 2022/23 were there for leisure/vacation break. This compares to 55% in 2018.
- Almost third (31%) of respondents were in Kelowna to visit friends and family. It is interesting to note that the many visitors were in Kelowna to visit friends and family, in the Spring (41%), a greater share than in the other three seasons.
- Visitors on business travel or attending conventions accounted for 7% of those surveyed (broadly consistent with 2018). Of those visitors specifically intercepted at Kelowna Airport, approximately 17% indicated business travel or conversations as their primary purpose of trip.
- Other reasons for visiting Kelowna in 2022/23 included medical appointments.



What is the main purpose of your trip?



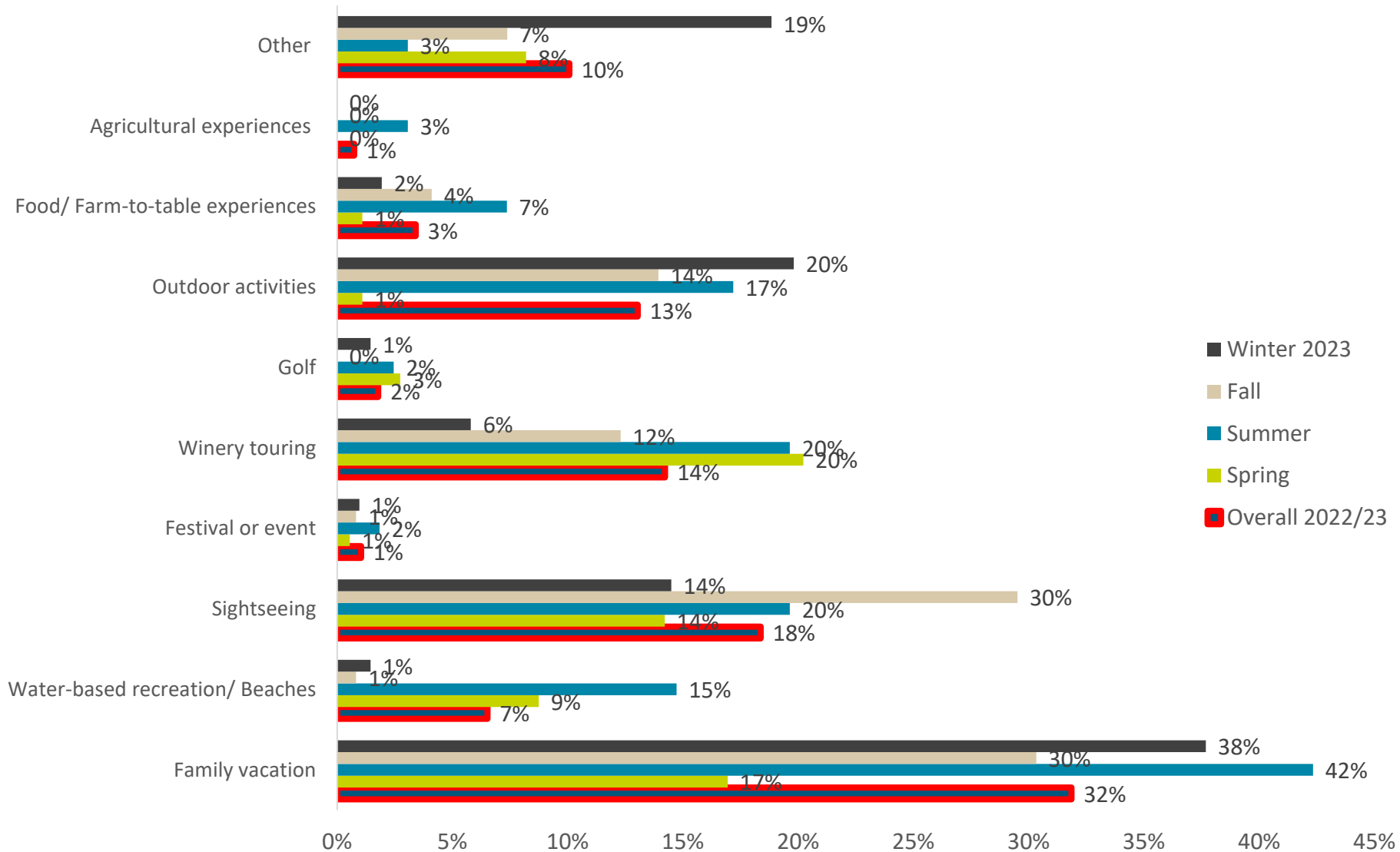
Purpose of Trip

- The top reasons for visiting Kelowna in 2022/23 was Family Vacations (32%), followed by sightseeing (18%). In 2018, sightseeing and wine touring led by 27% and 26% respectively.
- Family vacations was the top reason for travel to Kelowna in the Summer (42%), a marked increase from 2018 (27%).
- Winery Tours (20%) and Sightseeing (20%) were the main nonfamily reasons for travel to Kelowna in Summer 2022.
- Golf, festivals or events, attending conventions, agricultural experiences and other activities not listed accounted for nearly 17% of responses for all four survey time periods.





What are the top reasons for this specific trip?



Area of Origin

- Most visitors to Kelowna in 2022/23 were from Canada (80%).
- The majority of domestic visitors are from BC (37%), followed by approximately 20% of visitors originating from Alberta. In 2018, visitors from BC accounted for 37% and visitors from Alberta accounted for 24%.
- Calgary accounted for the greatest share of Albertan visitors to Kelowna in 2022/23 at 11%, followed by Edmonton at 5%.



Where are you from?

Origin	Spring	Summer	Fall	Winter 2023	Overall 2022/23
BC	38%	37%	38%	34%	37%
Greater Vancouver	18%	21%	14%	15%	17%
Victoria	5%	4%	4%	1%	4%
Other BC	15%	13%	20%	9%	14%
Alberta	23%	21%	16%	18%	20%
Calgary	15%	12%	8%	8%	11%
Edmonton	6%	6%	3%	5%	5%
Ontario	10%	6%	21%	18%	13%
Total Canada	80%	78%	82%	80%	80%

Area of Origin

- Other International (not incl. U.S) visitation was 14% of all visitors in 2022/23, similar to the 13% in 2018.
- Visitor share from the Asia-Pacific region was 5% in 2022/23, with more visitors from the region travelling to Kelowna in the Summer and Fall time frames.
- The total visitor share from the US was 6% in 2022/23, with visitors from California State leading the way. Visitors from Washington were the next most frequent travellers to Kelowna. The proportion of U.S. visitor share in this study is roughly consistent with 2018.
- Note that these findings reflect visitor survey responses rather than be conclusive of global market patterns.



Where are you from?

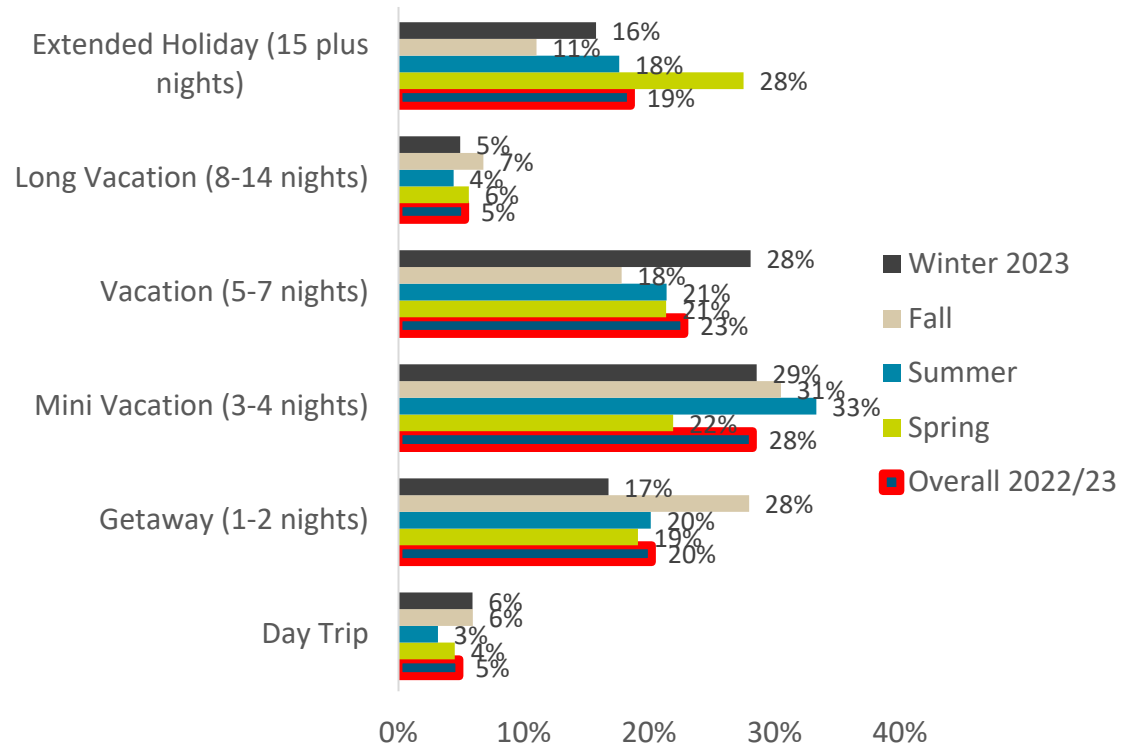
Origin	Spring	Summer	Fall	Winter 2023	Overall 2022/23
WA - Washington	1%	1%	0%	1%	1%
CA - California	1%	2%	3%	2%	2%
TX - Texas	0%	0%	0%	1%	0%
Other US	2%	1%	3%	6%	3%
Total US	4%	4%	5%	11%	6%
Asia - Pacific	3%	11%	4%	1%	5%
United Kingdom	4%	2%	3%	2%	3%
Germany	3%	3%	1%	1%	2%
International Visitors Besides Asia – Pacific, Germany and United Kingdom	5%	3%	5%	4%	4%
Total International (Not Including US)	16%	18%	13%	9%	14%

Length of Trip: Overall Time Away

- Mini vacations of 3-4 nights were the most popular overall trip length in 2022/23 (28%), followed by vacations of 5-7 nights (23%). The mini vacation was also the most popular overall trip length in 2018 (30%).
- Day trips accounted for 5% of visitors, consistent with 2018. *Please interpret the data on day trips with caution, due to small sample sizes in 2018 and 2022/23, respectively.*
- Extended holidays that span more than 15 days accounted for nearly 19% of overall visitor trip lengths in 2022/23, this is up slightly from 2018 (16%) levels. Long vacations of 8-14 nights accounted for 5% over visitors surveyed in 2022/23, which is down from 2018 (8%).



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.)

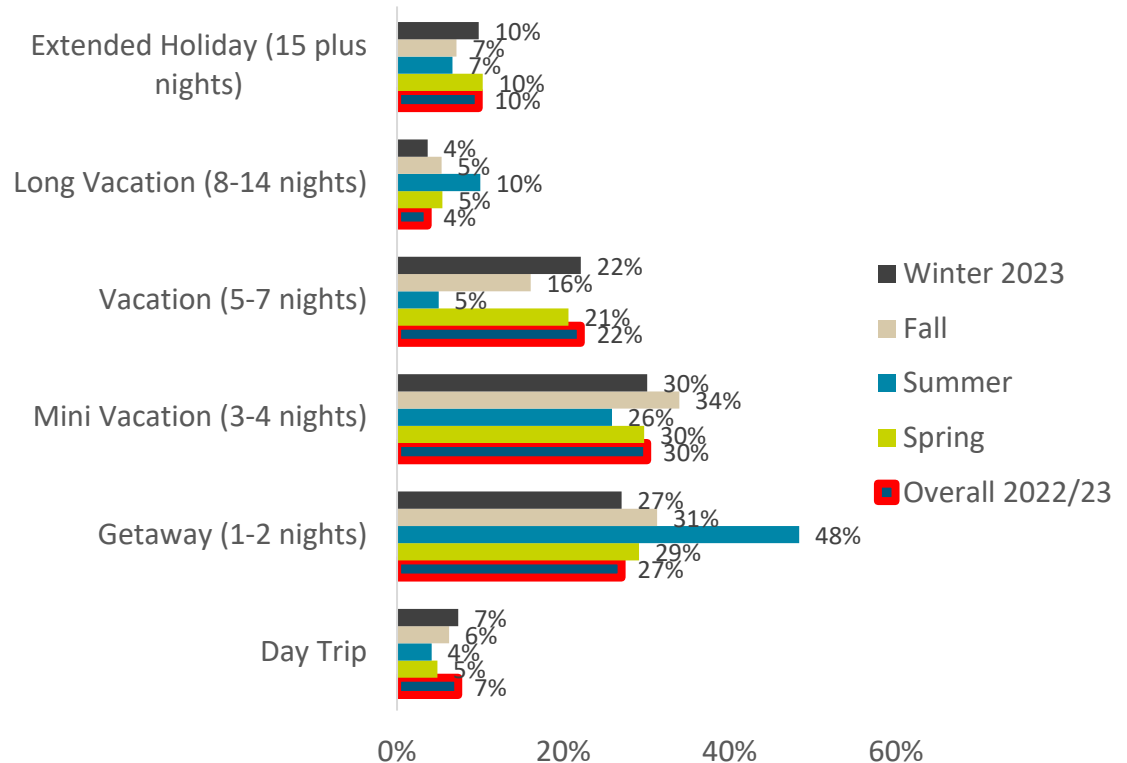


Length of Trip: Nights in Kelowna

- Mini vacations of 3-4 nights were the most popular to Kelowna in 2022/23 (30%), compared to 33% in 2018. This is followed by getaways of 1-2 nights (27%), close to 2018's figure of 29%.
- Day trips were semi steady through all four survey time periods, accounting for approximately 7%. *Please interpret the data on day trips with caution, due to small sample sizes in 2022/23.*
- Long vacations of 8-14 nights were more prevalent in the Summer (10%) time period in Kelowna. Extended holidays that span more than 15 days accounted for 10% of all visitors in 2022/23, and this is up from 2018 (5%).



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

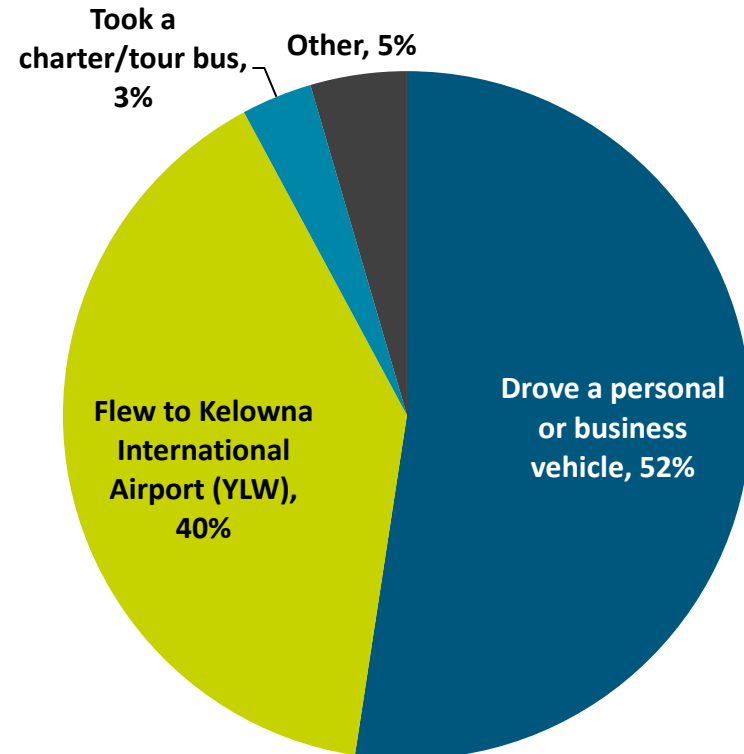


Mode of Transport to Kelowna

- Half of the survey respondents indicated that their party drove a personal or business vehicle to Kelowna in 2022/23, consistent with 2018 results (52%).
- Partly reflecting the continuance of surveys at Kelowna International Airport in 2022/23, the share of respondents flying accounted for nearly 40%. More visitors flew in the Winter, compared to Spring, Summer and Fall time periods.
- Surveys that indicated taking charter/tour bus accounted for 3% of all survey responses in 2022, down slightly from 5.2% in 2018.



On this trip, how did you get to Kelowna?

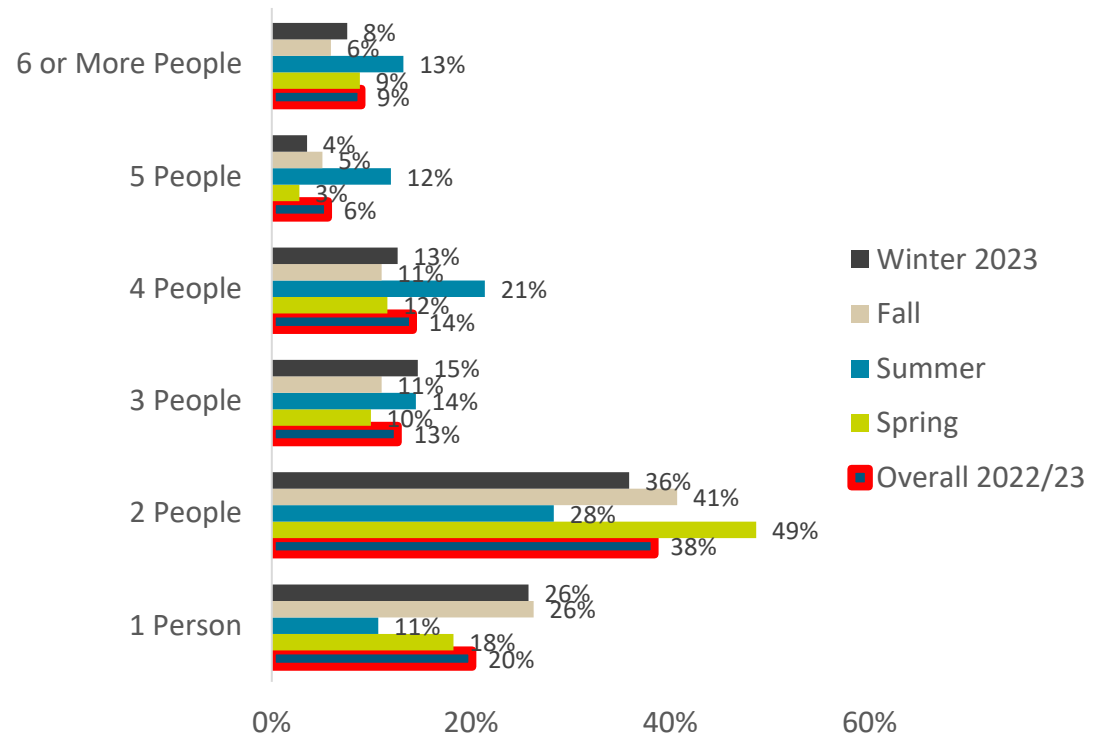


Travel Party Size

- Party sizes of two people were the most common in 2022/23 (38%), identical to 2018.
- Party sizes of 2, 3, and 5 people all reported very similar proportions in 2022/23 compared to 2018. There were also less visitors indicating party sizes of 6 or more people in 2022/23 than compared to 2018. *This is consistent with an overall reduction of tour group travels post pandemic.*
- The proportion of people travelling alone increased marginally to 20% in 2022/23, compared to 19% in 2018. There was a greater proportion of single travellers in the Fall/Winter compared to Spring and Summer 2022/23.
- The average party size in 2022/23 was 2.8 people, this compares to an average party size of 3.8 in 2018. Again, the decreased 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?

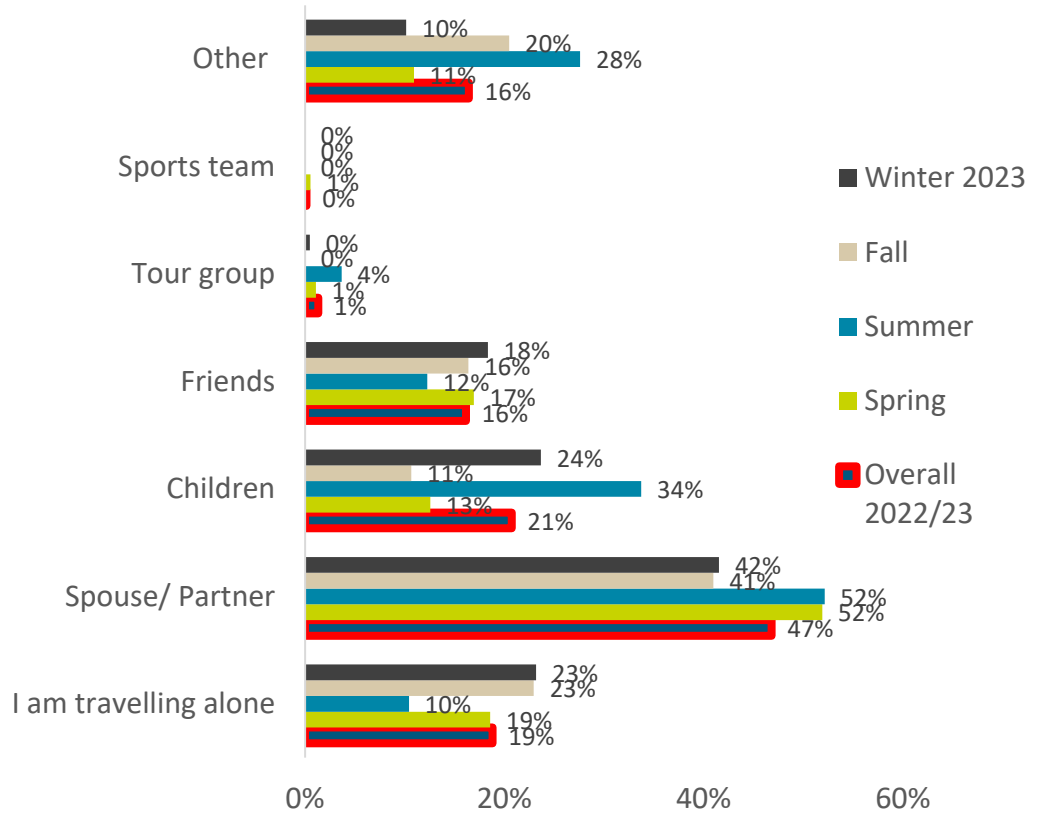


Travel Party Type

- The common travel companions of visitors were their spouse or partner, accounting for just under half (47%) of respondents in 2022/23. This is down slightly from 51% in 2018.
- Children accounted for 21% of travel companions in 2022, lower than 2018 (25%). Respondents travelling with other types of family relatives accounted for 16% of visitors.
- Approximately 19% of people travelled to Kelowna alone in 2022.
- A total of 1% of the surveys completed indicated travelling with a tour group.
- The remaining survey responses indicated travelling as a sports team or “other” typically comprised business colleagues in 2022/23, accounting for 16%.



Who are you travelling with on this trip?

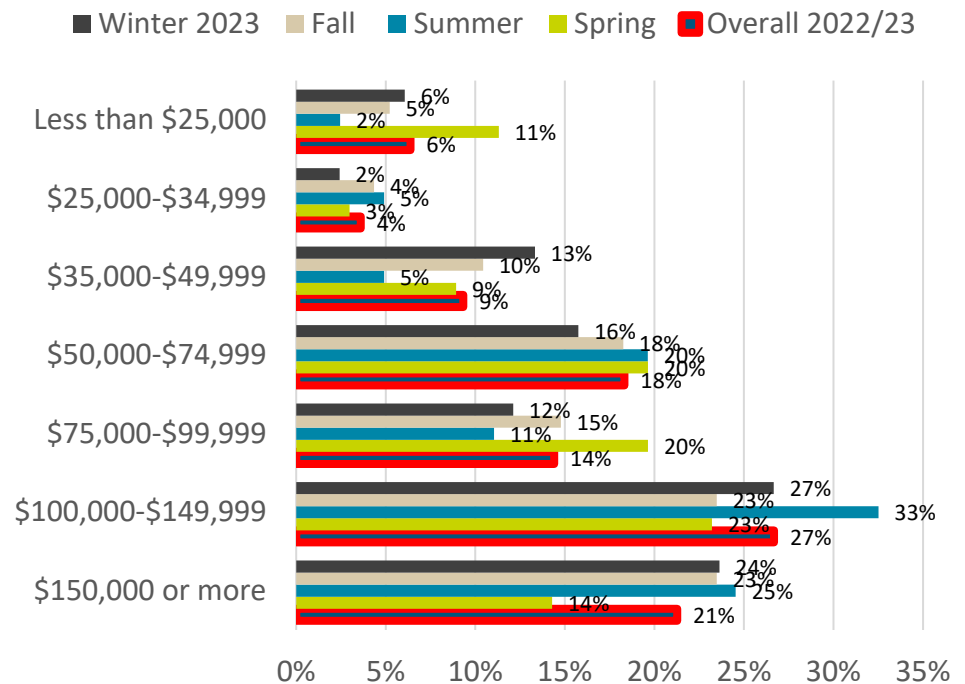


Travel Party Incomes

- Kelowna attracts a significant proportion of visitors from higher income households. Nearly 48% of respondents reported a household income of \$100,000 or more in 2022/23. A total of 611 survey responses (out of 1,587 survey completions) provided an answer to the question on income.
- In total, less than a fifth of respondents had a household income of \$49,999 or less (19%).
- 69% of visitors with household incomes of \$75,000 or more travelled in the Summer, compared to 61% in the Fall and Winter Period for the same income brackets.



In what broad category does your household income fall?



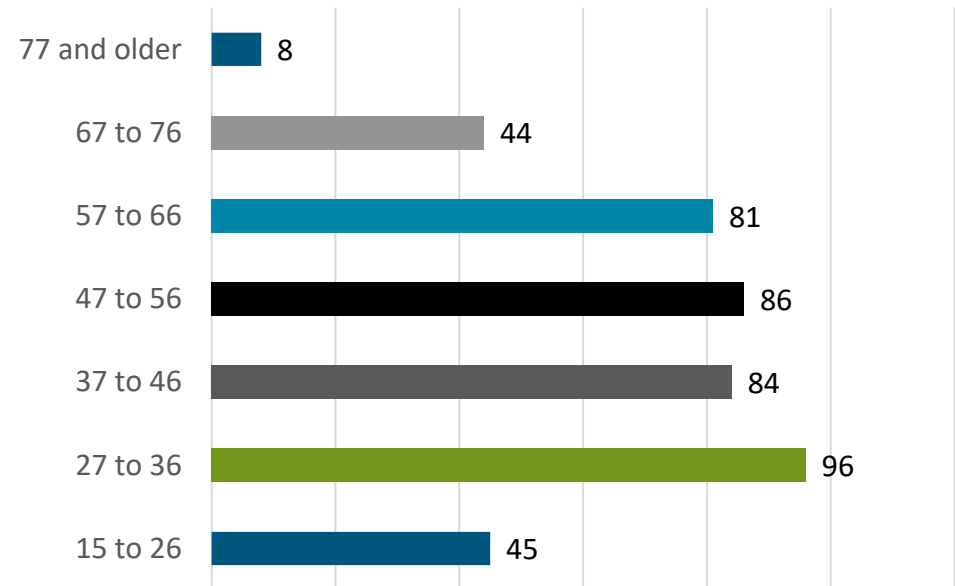
Visitor Respondent Age

- With its diverse activities and accommodation offer, Kelowna attracts a variety of demographics.
- The majority of visitors are aged 46 and under, accounting for 51% of respondents. The largest proportion of respondents by group were aged 27 to 36 (22%).
- Over 49% of visitors were 47 and over.



In what year were you born?

Number of Vistors in Age Group

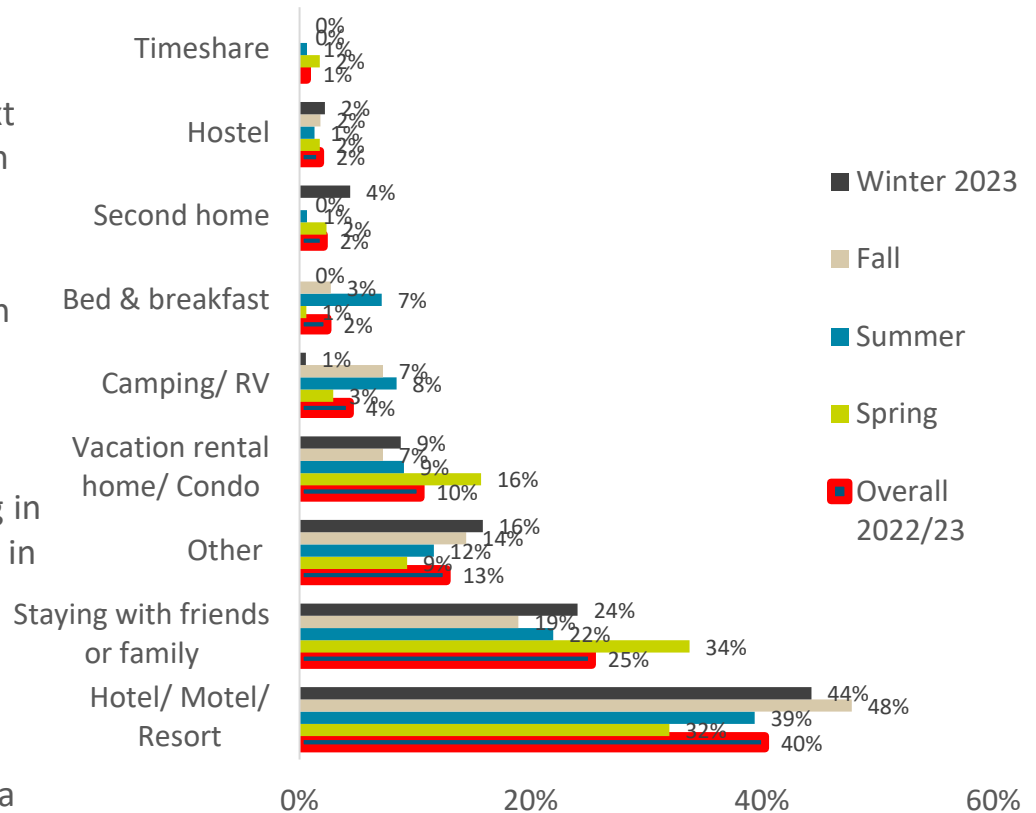


Preferred Accommodations

- The proportion of visitors staying in a hotel, motel or resort increased from 38% in 2018 to 40% in 2022/23, though it remained the most common accommodation choice.
- Staying with friends and family was the next most common response at 25%, down from 33% in 2018.
- Vacation rental homes/condos decreased in popularity from 2018 to 2022 (18% to 10% respectively).
- The proportion of visitors indicating staying in a B&B was 2% in 2022/23, compared to 3% in 2018.
- A total of 13% 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?

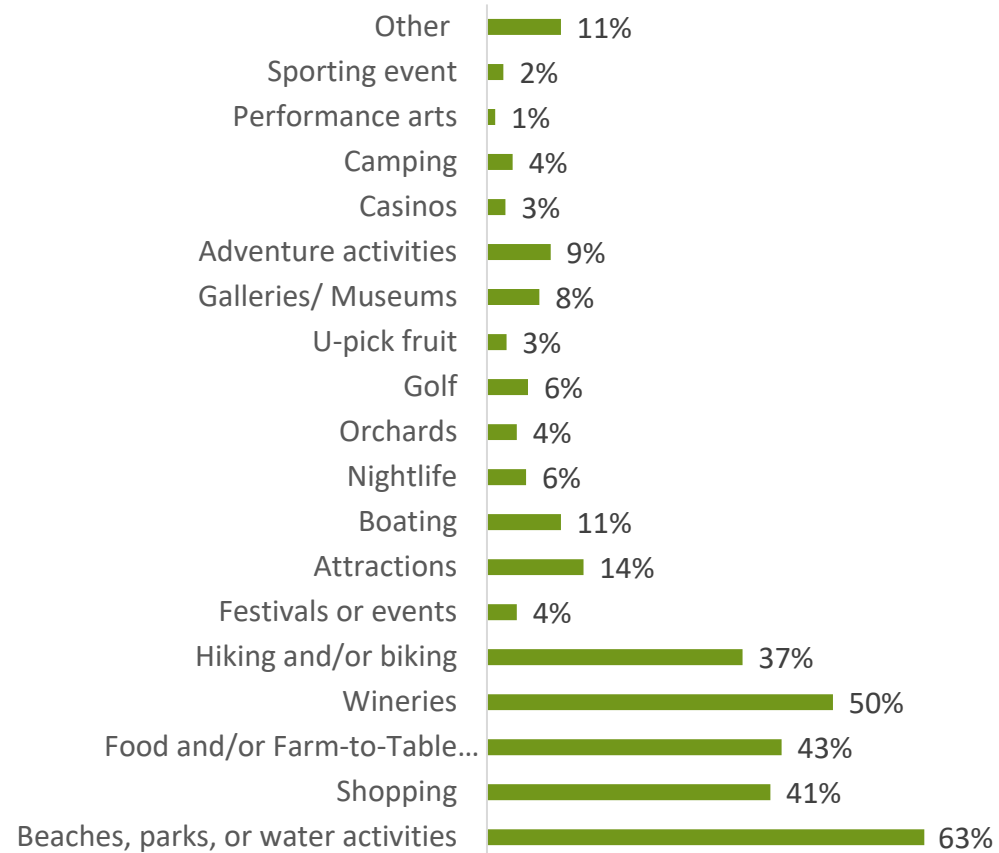


Type of Activities Planned/Participated In

- Beaches/parks/water activities were the most popular activities visitors are planning to participate in or have participated in while visiting Kelowna in 2022/23 (63%), this compares to 76% in 2018.
- The popularity of wineries was also very strong at 50%, a decrease from the 66% indicated in 2018.
- Food and farm to table experiences, adventure activities, galleries/museums and shopping activities all showed increases in popularity from 2022/23 to 2018.
- Many activities were notably less popular in 2022/23 than 2018, such as U-pick fruit, orchards, attractions, festivals and events, and casinos.
- Participation in certain outdoor activities were affected during the summertime 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?

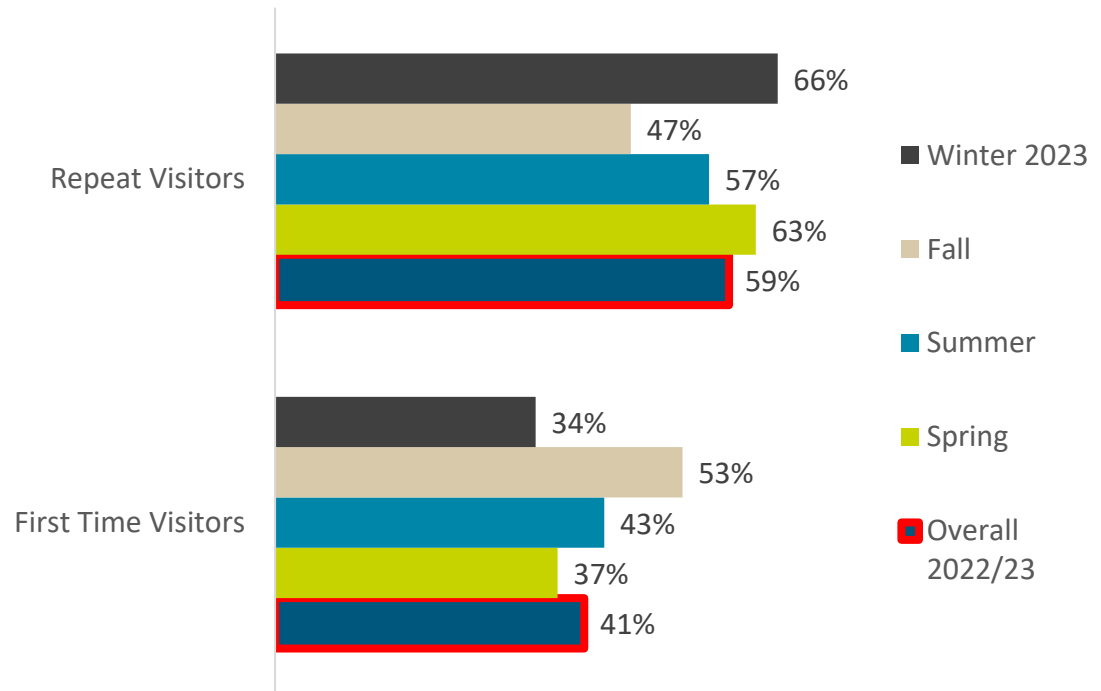
Activity	Spring	Summer	Fall	Winter 2023	Overall 2022/23
Performance arts	0%	0%	1%	0%	1%
Sporting event	0%	0%	0%	2%	2%
Casinos	1%	0%	0%	1%	3%
U-pick fruit	1%	1%	1%	0%	3%
Camping	1%	1%	1%	1%	4%
Festivals or events	1%	2%	1%	1%	4%
Orchards	0%	1%	2%	0%	4%
Nightlife	1%	0%	2%	3%	6%
Golf	2%	2%	1%	1%	6%
Galleries/ Museums	1%	1%	2%	4%	8%
Adventure activities	1%	4%	1%	3%	9%
Boating	3%	5%	2%	1%	11%
Other	2%	1%	2%	6%	11%
Attractions	4%	3%	5%	3%	14%
Hiking and/or biking	8%	9%	9%	11%	37%
Shopping	11%	11%	8%	11%	41%
Food and/or Farm-to-Table Experiences	9%	15%	9%	9%	43%
Wineries	17%	16%	9%	8%	50%
Beaches, parks, or water activities	19%	21%	10%	13%	63%

Repeat Visitation

- Repeat visitation decreased from 2018 (64%) to 2022/23 (59%).
- The proportion of first-time visitors to Kelowna increased from 36% in 2018 to 41% in 2022/23.
- Repeat visitation was highest during the Winter, whereas more first-time visitors to Kelowna, did so in the Fall.



Is this your first trip to Kelowna?





Visitor Intercept Survey Findings: Visitor Spending

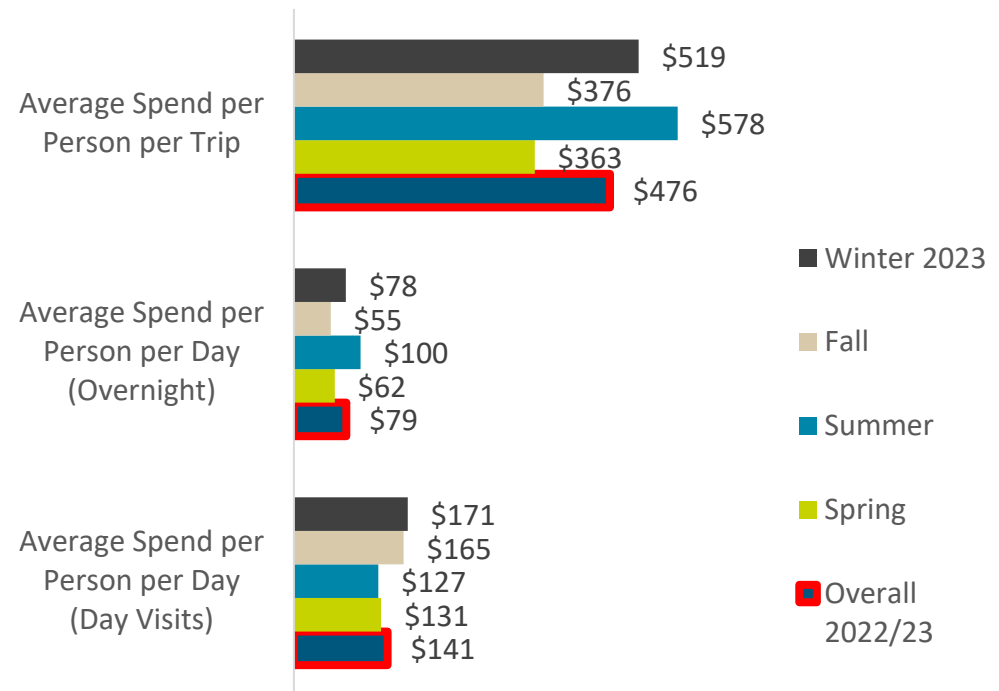


Total and Average Spending

- The total average spending by visitor parties in 2022/23 was \$1,577. Visitor parties in the Summer was the highest with an average of \$2,217 per party per trip.
- Average spending per person per trip (*i.e., including overnight visitors and day trippers*) was \$476 in 2022/23, when adjusted for seasonality. The average was highest for visitors in the Summer.
- Each overnight visitor party spent an average of \$1,624 per trip in 2022/23. Spend was lowest for those travelling in the Fall.
- The average spending per person per day for overnight visitors is \$79 in 2022/23 compared to \$144 in 2018. Note that the average length of stay for overnight visitors in 2022/23 was 6.4 days compared to 3.7 days in 2018.
- The average spending per person per day for day trips was \$141 in 2022/23. A notable jump from \$55 in 2018.



Total spending per party and per person



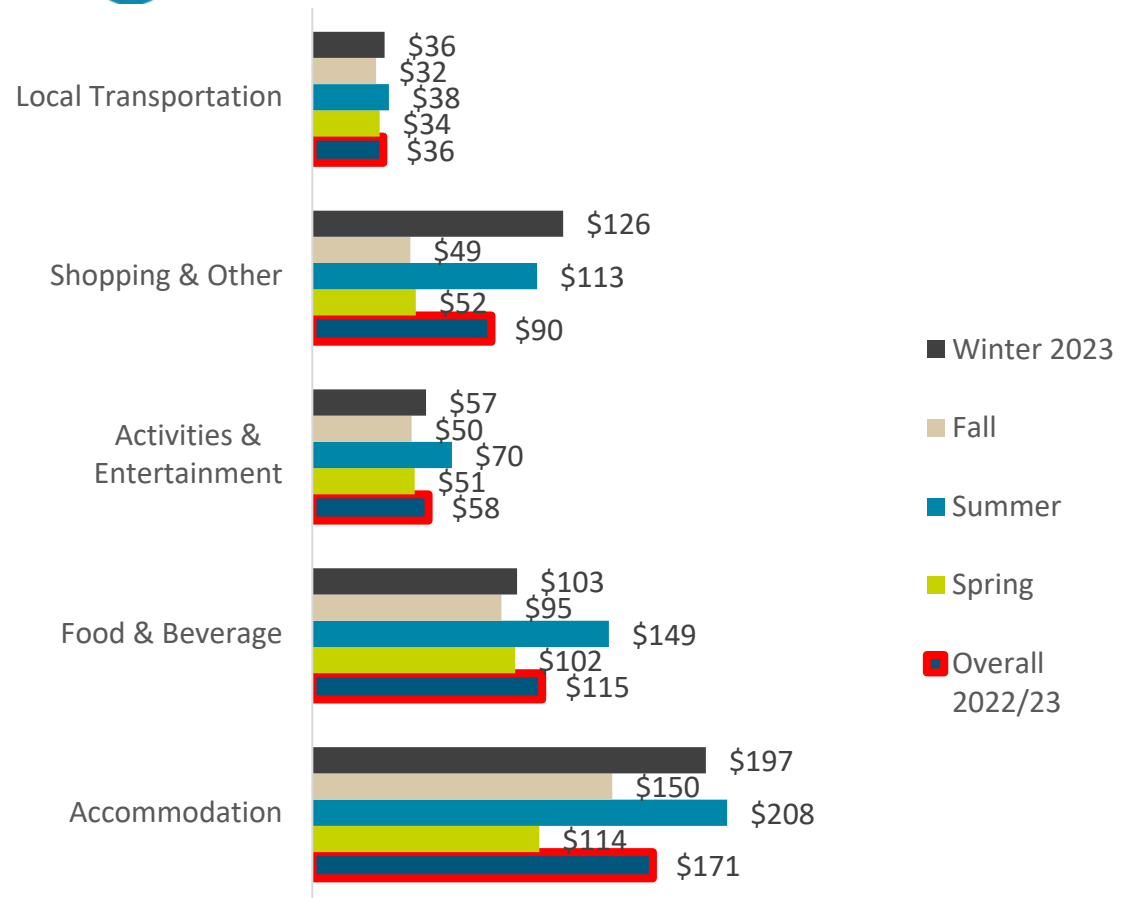
Note: Small sample size for day visit spenders (n=32), please interpret with caution.

Spending by Category

- Per visitor spending on accommodation in 2022/23 decreased compared to 2018 (\$171 and \$188 respectively).
- Also, spending on activities & entertainment plus food and decreased from 2022/23 to 2018.
- Spending on local transportation was slightly more in 2022/23, than compared to 2018.
- Shopping & Other saw a significant increase from \$53 in 2018 to \$90 in 2022/23.



Average per trip Spending by Category per Visitor





Visitor Intercept Survey Findings: Visitor Satisfaction

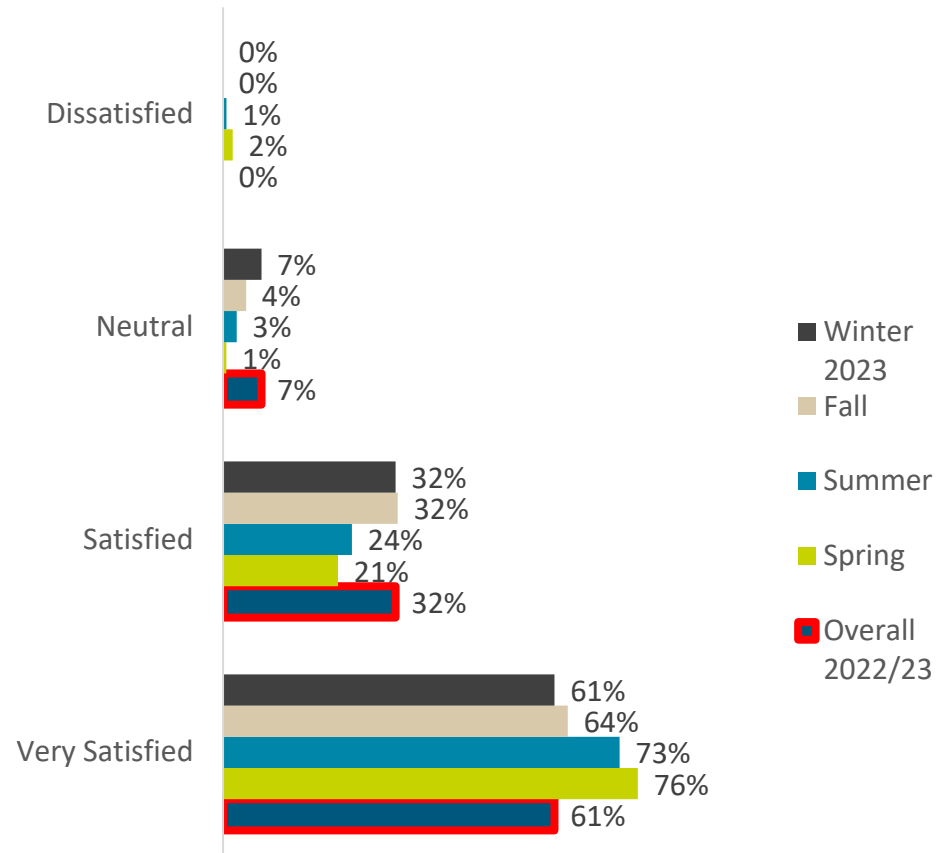


Visitor Satisfaction: Overall Experience

- Overall, visitors were highly satisfied with their time spent in Kelowna. Approximately 93% of visitors were either very satisfied or satisfied with their Kelowna destination experience in 2022/23.
- Visitors to Kelowna in the Spring indicated the highest level of satisfaction, as 98% indicated that they were either very satisfied or satisfied.
- In the Spring, 2% of visitors were dissatisfied with their trip.



How satisfied are you with your overall experience in Kelowna?



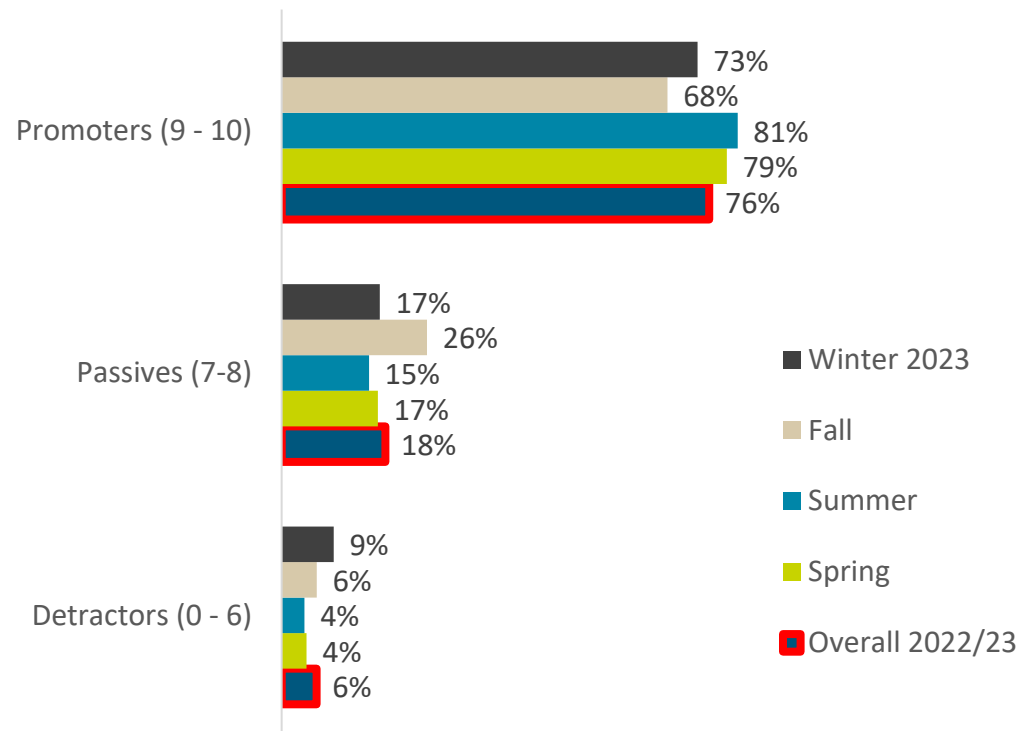
Visitor Referral and Net Promoter Score

- The sample size for 2022/23 was 617 surveys.
- Promoters (those indicating a 9 or 10 on the 10-point scale, with 10 being the highest) comprised 76% in 2022/23. The proportion of Promoters has increased compared to 2018 (71%).
- The share of responses from passives (those indicating a 7 or 8 on the 10-point scale) was 18% in 2022/23.
- Detractors (those indicating a response of 6 and below on the 10-point scale) accounted for 6% of responses in 2022/23, consistent with 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 2022 was 617 surveys.
- Visitors were likely to refer others to Kelowna as a place to visit, with a Net Promoter Score of +69 in 2022/23, this is a four-point increase from the 2018 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 (2022/23):

- ***Overall: +69***
- ***Spring: +74***
- ***Summer: +77***
- ***Fall: +62***
- ***Winter: +64***



Summary



Summary



Purpose of Trip

The majority (61%) of visitors to Kelowna in 2022/23 were there for leisure/vacation break. The most popular reasons for visiting Kelowna in 2022 was family vacation (32%), followed closely by sightseeing (18%) for the top cited 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. (15% 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 2 people, down from 4 in 2018.



Mode of Transportation

Half (52%) of completed surveys indicated that their party drove to Kelowna, with a significant proportion (40%) flying into Kelowna International Airport.



Preferred Accommodations

More than a third (40%) of visitors stayed at a hotel/motel/resort in Summer 2022/23, while nearly as many (25%) stayed with family and friends. Approximately 10% of visitors stayed a vacation rental home/condo in Kelowna in 2022/23.



Type of Activities

The top activities for visitors in 2022/23 was visiting beaches, parks or water activities and wineries.

Summary



Visitor Spending

- Average total spending by all parties while in Kelowna was **\$1,577**, with an average total spending per person per trip of **\$476**. Overnight visitors to Kelowna spent on average **\$79** per person per day, while each day visitor spent an average of **\$141** per person per day. Visitors are typically affluent with nearly 48% of visitors indicating having an annual household income of \$100,000 or more.
- Average expenditure on accommodations was **\$177** compared to **\$188** in 2022/23. Meanwhile, spending on shopping and other activities increased compared to 2018.



Visitor Satisfaction

- A significant majority of visitors (93%) 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 +69 in 2022/23.