



## **RESEARCH SERVICES**

# **A PROFILE OF VISITORS TO BRITISH COLUMBIA'S OKANAGAN VALLEY: FOCUS ON CULTURAL TOURISTS**

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## **Executive Summary**

The Okanagan Cultural Corridor Project (OCCP) is an on-going project developed in 2000, designed to increase cultural tourism in the Okanagan Valley by packaging and marketing the Valley's cultural attractions. Cultural attractions as defined by the OCCP include: museums, art galleries, artist studios, historic sites and heritage attractions, arts events and cultural festivals, First Nations cultural attractions, wineries, open farms and orchards and, food processors and chefs.

At the inception of the project, Research Services, Tourism British Columbia was mandated to provide research support to the OCCP. On-site interviews of tourists in the Okanagan were conducted in the summer of 2002 and will be conducted periodically (every several years) for the life of the OCCP. Interviews were conducted at various sites around the Okanagan Valley. For this study, the sites were categorized as tourist sites (Penticton Beaches, Downtown Kelowna, British Columbia Parks-Picnic Area and Tickleberries Fruit Stand), wineries (Cedar Creek Winery, Mission Hill Winery, Sumac Ridge Winery and Tinhorn Creek Winery) and Visitor Info Centres (VICs; Penticton and Kelowna).

The purpose of this report is:

1. To determine the incidence and characteristics of tourists that can be defined as cultural travelers using an activity based definition.
  2. To provide overall demographic and trip characteristic profiles of travelers to the Okanagan as well as an examination of responses based on survey group.
- Between June and September of 2002, 2,415 visitors to the Okanagan Valley were interviewed at four tourist sites (45.8%), four wineries (29.0%) and two VICs (25.2%).
  - Over two-fifths (42%) of all visitors came from British Columbia. This pattern was especially pronounced at wineries (48%) and less evident at VICs (31%). Another two-fifths (39%) of visitors were Canadians from outside British Columbia. These visitors were found in significantly higher proportions at VICs (46%) compared to wineries (36%) and tourist sites (38%). Over one-tenth (11%) of all visitors were from overseas countries. These visitors were more likely to be found at VICs (14%) and tourist sites (13%) than at wineries (6%). US visitation was similar between all study groups (7-9%).
  - Over half (51%) of all respondents had completed university degrees. Over one-third (35%) of all visitors to the Okanagan came from households with annual incomes of \$100,000 or more. Tourist site travelers had significantly larger travel party sizes (avg. = 3.51) compared to their winery (avg. = 3.20) and VIC counterparts (avg. = 3.03). Tourist site travelers were also significantly more likely to be traveling with children (38%) compared to visitors at VICs (32%) and wineries (25%).
  - Over two-thirds (71%) of visitors to the Okanagan Valley were traveling for leisure. This was most pronounced at VICs (79%) and significantly less so at tourist sites (66%). On the other hand, tourist site travelers were significantly more likely (24%) to be visiting friends and family compared to their VIC counterparts (12%).

- Over four-fifths (83%) of travelers to the Okanagan Valley were traveling in a car, truck or motorcycle. This pattern was most pronounced at wineries (90%) and significantly less apparent at tourist sites (78%).
- Over two-fifths (45%) of visitors to the Okanagan Valley used a resort/hotel/motel/B&B for their overnight accommodation. This was especially true for winery visitors (50%). A significantly higher proportion of VIC respondents (37%) used a campground/RV park compared to tourist site (23%) and winery visitors (23%). Similarly, significantly more tourist site travelers (27%) stayed with friends or relatives compared to their VIC counterparts (11%).
- Over one-fifth (23%) of all travelers indicated that they were visiting the Okanagan for the first time (from the mailback questionnaire). This was particularly true in the case of VIC visitors where a significantly higher proportion (36%) had never visited the Okanagan before.
- Over two-thirds (71%) of travelers planned their trips 3 or more weeks in advance. This was true for all survey groups. Fewer travelers planned their trip less than one week in advance.
- The Internet (40%) was the most frequently cited source of information used by travelers planning their trip to the Okanagan. Word of mouth (35%) and brochures and books (23%) were other information sources frequently used by these travelers.
- Travelers in the three groups were generally similar with their trip flexibility in terms of activities, time in the Okanagan Valley and time in British Columbia.
- Popular activities (i.e., having participation rates of 50% or higher) included swim/other water based activities (75%), visiting a farm/farmers market/orchard/food processor (75%), shopping (66%) and nature-based activities (64%). These activities were consistently rated highly regardless of the survey respondent group.
- Activities rated as important or very important in trip planning by over half of all travelers included swimming/other water based activities (67%), nature-based activities (60%), sporting events other than golf (59%), wine festivals (56%), a farm/farmers market/orchard/food processor (52%) or golf (52%).
- Activities that were rated as important but not participated in as much included participating/attending a sporting event other than golf, visiting a wine festival, golf, visiting a heritage festival/event and visiting a First Nations attraction.
- The two most frequently cited positive images visitors had of the Okanagan Valley were the beautiful landscape/scenery (68%) and the good climate (65%). These responses were consistent across the three survey groups.
- The negative image of the Okanagan Valley that was most frequently cited by over a third (36%) of all travelers was the amount of traffic. This was especially pronounced amongst winery visitors (40%) and less evident for those visiting VICs (29%).

- Almost three-fifths (56%) of all travelers mentioned the beautiful landscape/scenery in the area as the most unique characteristic of the Okanagan Valley.
- The majority of travelers interviewed were 'somewhat or very satisfied' with their trip to the Okanagan Valley (89%) and to British Columbia (96%). These satisfaction levels were consistently high across all survey groups.
- A majority (92%) of travelers also indicated they were 'likely or very likely' to take another trip to the Okanagan Valley or within British Columbia (95%).
- Almost a fifth (20%) of visitors rated arts and cultural activities as 'important' or 'very important' motivators in their decision to return to the Okanagan Valley.
- Travelers responded with similar ratings (22%) in response to the importance of arts and cultural activities in their likelihood to return to the province of British Columbia.
- On average, travelers spent \$167 per day. Winery visitors spent significantly more (\$188) than did visitors at VICs (\$165) and tourist sites (\$155).
- Almost two-fifths (37%) of travelers were classified as "Cultural Tourists". Significantly more cultural travelers visited wineries (55%) compared to tourist sites (34%) and VICs (22%).

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## **Introduction**

The Okanagan Cultural Corridor Project (OCCP) is an on-going project developed in 2000, designed to increase cultural tourism in the Okanagan Valley by packaging and marketing the Valley's cultural attractions. Cultural attractions as defined by the OCCP include: museums, art galleries, artist studios, historic sites and heritage attractions, arts events and cultural festivals, First Nations cultural attractions, wineries, open farms and orchards and, food processors and chefs.

At the inception of the project, Research Services, Tourism British Columbia was mandated to provide research support to the OCCP. Tourism British Columbia is leading the research project although a number of partners have contributed funding or in-kind services. The partners and their contributions include:

- Canadian Tourism Commission (funding)
- Community Futures of the Central Okanagan (funding)
- Okanagan Cultural Corridor Project (in-kind time)
- Thompson Okanagan Tourism Association (in-kind time)
- Kelowna Chamber of Commerce/Tourism Kelowna (in-kind time, interview site)
- Penticton and Wine Country Chamber of Commerce (in-kind time, interview site)
- Cedar Creek Winery, Mission Hill Winery, Sumac Ridge Winery and Tinhorn Creek Winery (in-kind time and interviewing site)
- Tickleberries Fruit Stand (in-kind time and interviewing site) and,
- BC Parks (in-kind time and interviewing site).

The research program is designed to:

1. Provide research needed to support the development and implementation of the Okanagan Cultural Corridor Project,
2. Provide on-going measurement of the effectiveness of the Okanagan Cultural Corridor Project and to evaluate the return on Tourism British Columbia's and other industry partners investment in the Project.

On-site interviews of tourists in the Okanagan were conducted in the summer of 2002 and will be conducted periodically (every several years) for the life of the OCCP. Interviews of tourists will be used to track changes in trip length, activity participation, and changes in the proportion of cultural travelers. This report is part of a series of reports outlining results of the on-site interviews. The purpose of this report is:

1. To determine the incidence and characteristics of tourists that can be defined as cultural travelers using an activity based definition.
2. To provide overall demographic and trip characteristic profiles of travelers to the Okanagan as well as an examination of responses based on survey group (tourist sites, wineries and VICs).

## **Methods**

### **Data Collection**

The information presented in this report is based on data collected from travelers during and after their trip to the Okanagan Valley. The interviews took place between June 19 and September 13, 2002 at various sites in the Okanagan Valley (Appendix A). Potential respondents were randomly chosen at the participating sites. For the purposes of this report, the sites were categorized as tourist sites (Penticton Beaches, Downtown Kelowna, British Columbia Parks-Picnic Area and Tickleberries Fruit Stand), wineries (Cedar Creek Winery, Mission Hill Winery, Sumac Ridge Winery and Tinhorn Creek Winery) and Visitor Info Centres (VICs; Penticton and Kelowna).

On-site interviews collected information from travelers during their trip and the mailback questionnaire collected information from travelers after their trip. The primary purpose of the mailback questionnaire was to collect traveler's perceptions of the Okanagan Valley and British Columbia after their trip was complete. Respondents were asked if they were willing to participate in the interview and were given a Super, Natural British Columbia™ refrigerator magnet for their time if they agreed to participate. Respondents were also asked if they were residents from the Okanagan Valley (between Enderby and Osoyoos) and, if so, were eliminated from the remainder of the interview ensuring only travelers were interviewed. The interviewer used a hand-held palm pilot pre-programmed with interview questions (Entryware Software) to record all responses. During the interview, questions were asked about:

- traveler demographics,
- trip-planning habits,
- primary trip purpose,
- primary destination,
- primary accommodations,
- mode of transportation,
- length of stay in the Okanagan Valley and British Columbia,
- trip flexibility,
- daily expenditures, and
- trip activities (see Appendix B for a sample of the survey used at participating wineries).

In addition, mailing addresses were collected from those respondents in the interview that agreed to participate in the mailback questionnaire. A copy of British Columbia Magazine and a chance to win a digital camera were used as incentives to achieve a high participation rate. Questionnaires were sent out with a business reply envelope and a British Columbia Magazine in mid-October 2002. The first mailing was followed by a second reminder postcard and third mailing of just a questionnaire and business reply envelope. Responses were accepted until January 24, 2003. The overall response rate of 57.0% was based upon a 56.1% response from the tourist sites, a 61.2% response rate from the wineries and a 53.2% response rate from the VICs. The mailback questionnaire collected a variety of information including:

- length of stay in the Okanagan Valley and British Columbia,
- primary trip purpose,
- primary destination,
- primary accommodations,

- daily expenditures,
- positive and negative images of the Okanagan Valley,
- the unique characteristics of the Okanagan Valley as a vacation destination,
- satisfaction with the Okanagan Valley and British Columbia, and
- the likelihood of returning to the Okanagan Valley and British Columbia (see Appendix B for a sample of the mailback survey sent to visitors who were interviewed at participating wineries).

### **Data Analysis**

A total of 2,415 respondents who visited the Okanagan Valley were included in the analysis (Appendix Table A1). Upon initial examination of the data, differences were found between the survey groups. Therefore, the data collected in the study were analyzed in order to compare travelers that were interviewed at tourist sites (45.8%; n=1,105), wineries (29.0%; n=701) and VICs (25.2%; n=609). Where possible, results are presented for all three groups. Where practical and when assumptions were met, significance tests were conducted to assess differences between the groups. All statistical tests used a 0.05 significance level.

Using a subset of variables, cultural travelers were identified and compared with non-cultural travelers in both groups. Cultural travelers were defined as those who indicated that visiting a farm, farmers market, orchard or food processor; participating in a special dining experience; visiting a natural history attraction; visiting a wine festival; visiting a heritage or historic site; visiting an art gallery; visiting an artist studio; visiting a museum; visiting a First Nations attraction; attending an arts festival or event or visiting a heritage festival or event were "very important" in planning their trip to the Okanagan Valley. They also included travelers who indicated that arts and culture activities, visiting wineries in general and visiting the particular winery they were visiting at the time of the survey were "very important" in planning their current trip to the Okanagan Valley.

The study design produced two sets of data that are available for analysis - the interview and mailback questionnaires. A series of significance tests were conducted to assess statistical significance of differences between the two data sets (Appendix D). Results of those tests and several other factors (sample size issues and results from similar studies at other locations) indicated that the interview data was the better source of data when the same or similar questions were asked on both questionnaires (very few questions). Therefore, all results presented in the remainder of this report are from the interview unless otherwise noted.

### **Seasonal Considerations**

During the course of this research project, data was collected from various participating wineries, VICs and tourist sites in the Okanagan Valley. While sampling at the VICs as well as at the tourist sites took place between June and September, sampling at participating wineries continued until the middle of October 2002. Statistical analysis of respondents who completed their surveys prior to September 14 with those who completed it after this date indicated that the two groups were significantly different with respect to gender, age, transportation mode, accommodation, travel party size, length of stay, information sources used for trip planning purposes, flexibility with respect to spending additional time in British Columbia and activity participation patterns (Appendix C).

In order to ensure consistency and comparability between the groups (tourist sites, wineries, VICs) in this overall report, only data that was collected from the wineries between June and September (Appendix A) was utilized in deriving a comparative profile of winery visitors. Individual reports



have been delivered to each winery where October data was included. Please note this distinction when comparing results from individual winery reports with those in this overall report.

Throughout the report, the words 'traveler', 'visitor' and 'tourist' have been used interchangeably. They refer to the study group – those people that agreed to the interview and were from outside of the Okanagan Valley.

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## Results

Between June and September of 2002, 2,415 travelers were interviewed in the Okanagan Valley. Over two-fifths (46%) of these surveys were completed at tourist sites, three-tenths (29%) were conducted at wineries and the remaining quarter (25%) took place at VICs (Table 1).

Table 1. The number of travelers interviewed in each survey group.

Survey Group	Number of Respondents	Percentage of Respondents
Tourist Sites <sup>1</sup>	1,105	45.8%
Wineries <sup>2</sup>	701	29.0%
VICs <sup>3</sup>	609	25.2%
<b>Total</b>	<b>2,415</b>	<b>100.0%</b>

1. Includes interviews from four tourist sites (Penticton Beaches, DWTN Kelowna, BC Parks-Picnic Area (Kickininee) and Tickleberries Fruit Stand).
2. Includes interviews from Mission Hill Winery, Cedar Creek Winery, Sumac Ridge Winery and Tinhorn Creek Winery.
3. Includes interviews from Penticton and Kelowna VICs.

### Traveler Characteristics (Demographics)

In terms of origin, over two-fifths (42%) of all visitors came from British Columbia (Figure 1). This pattern was especially pronounced at wineries (48%) and less evident at VICs (31%). Another two-fifth (39%) of visitors were Canadians from outside British Columbia. These visitors were found in significantly higher proportions at VICs (46%) compared to wineries (36%) and tourist sites (38%). Over one-tenth (11%) of all visitors were from overseas countries. These visitors were more likely to be found at VICs (14%) and tourist sites (13%) than at wineries (6%). US visitation was similar between all study groups (7-9%; Figure 1).

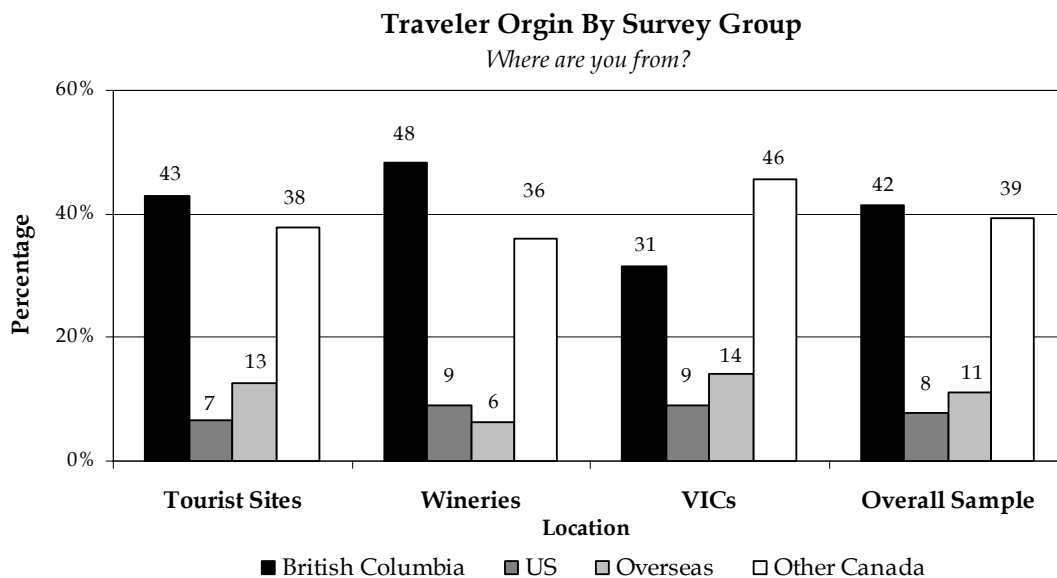


Figure 1. Origin of Travelers in the Okanagan Valley.

The majority of travelers from provinces outside of British Columbia originated from Alberta (66%), Ontario (15%) and Quebec (7%). However, there were substantially more Albertans (69%) at the tourist sites compared to the VICs (62%) and substantially more Quebec visitors at VICs (11%) compared to wineries (6%) and tourist sites (5%). Other Canadian visitors came from the provinces of

Manitoba, Newfoundland, Nova Scotia, New Brunswick, Yukon, Northwest Territories, Prince Edward Island and Nunavut (Figure 2). The majority of travelers from the United States were from Washington (39%), California (21%), Texas (6%) or Oregon (5%; Figure 3). The majority (80%) of overseas travelers visiting the Okanagan Valley were European and only small proportion was from Asia (Figure 4).

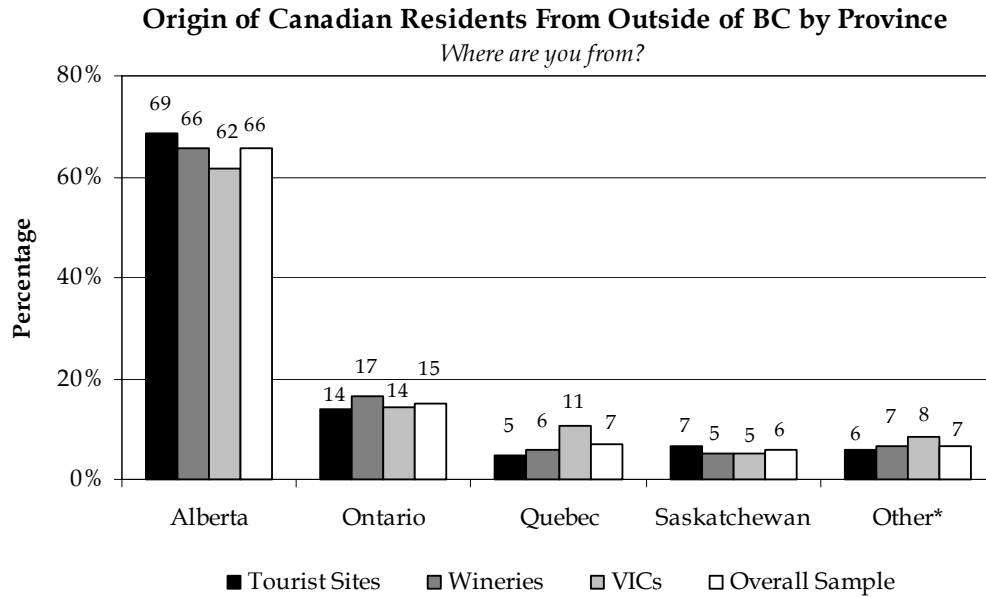


Figure 2. The percentage of travelers from provinces outside of British Columbia. \*Other includes Manitoba, Newfoundland, New Brunswick, Nova Scotia, NWT, Yukon, Prince Edward Island and Nunavut.

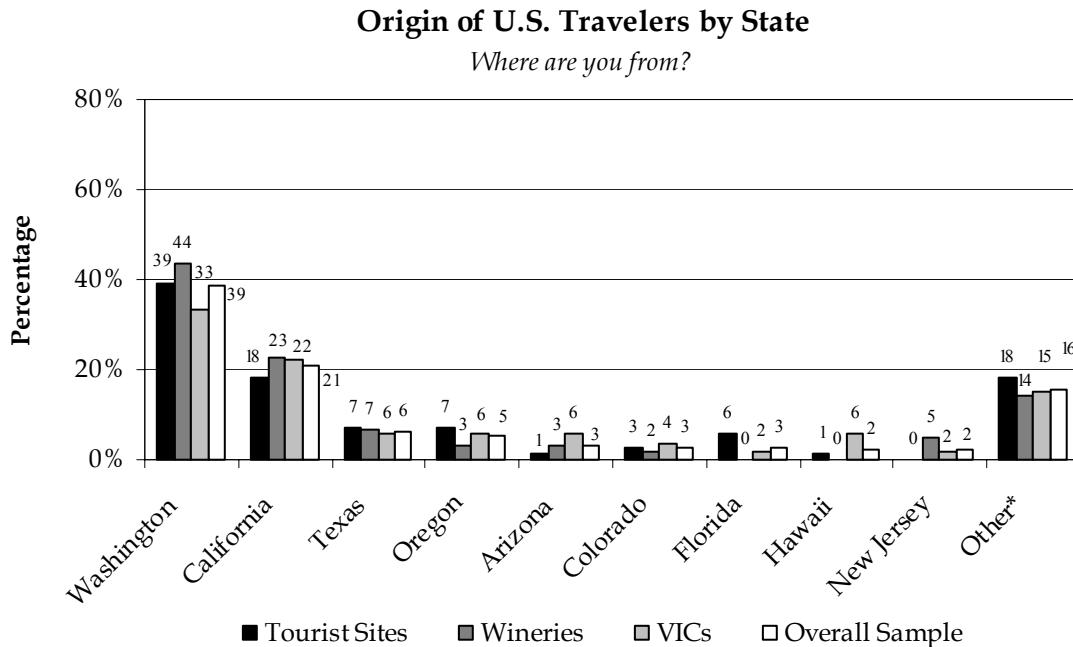


Figure 3. The percentage of US travelers by state. \*Other includes, Idaho, Montana, Illinois, Iowa, North Carolina, Pennsylvania, Virginia, Connecticut, Georgia, Louisiana, Maine, Maryland, Michigan, Minnesota, Missouri, Nevada, New Hampshire, Ohio, South Dakota, Utah and Wisconsin.

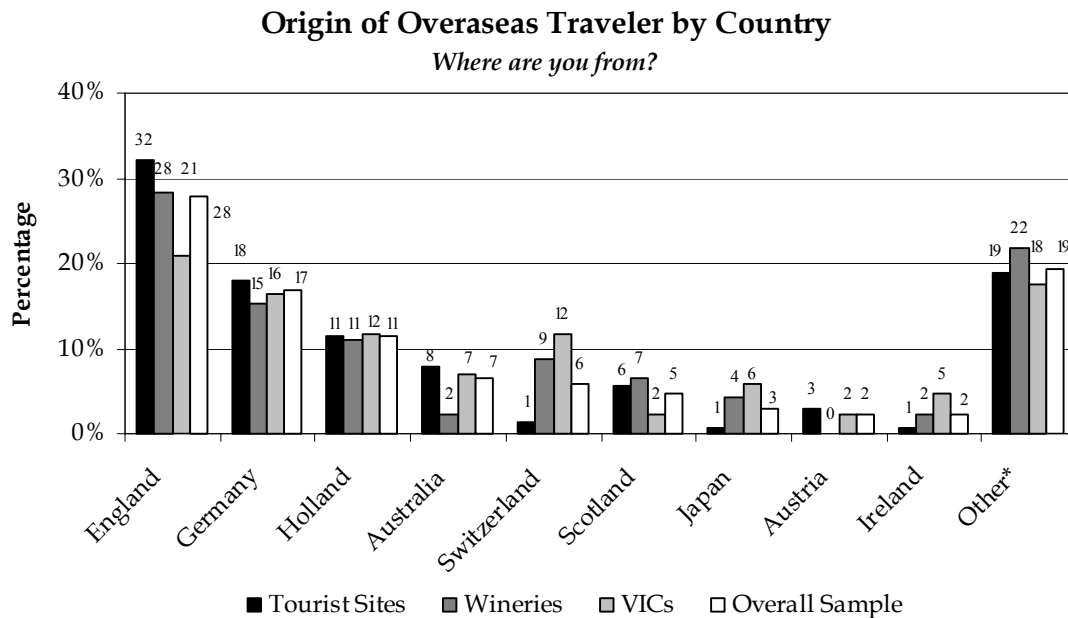


Figure 4. The percentage of overseas travelers by country. \* Other includes France, New Zealand, Denmark, Mexico, Belgium, Hong Kong, Italy, Wales, Brazil, Czech, Hungary, Korea, Sweden, Bahrain, Bermuda, Cayman, China, Curacao, Indonesia, Israel, Qatar, Singapore, Spain, Taiwan and Trinidad.

Although there were no significant differences in the gender, there were slightly more male (52%) than female (48%) visitors to the Okanagan Valley. This was particularly evident at VICs (54%) and wineries (53%). However there were significant differences in the age and income of travelers in the survey groups (Table 2). There were proportionately more mature (72%; 45 years and older) participants at wineries compared to tourist sites (68%) and VICs (68%). Wineries also had the lowest proportion of visitors that were less than 24 years of age. Over one-third (35%) of all visitors to the Okanagan came from households with an annual income of \$100,000 or more. These households were most pronounced amongst winery visitors (44%) and significantly less evident amongst tourist site (32%) and VIC (32%) travelers. Over half (51%) of all respondents had completed university degrees. This was especially evident amongst winery (59%) and VIC travelers (55%) and less so amongst those at tourist sites (43%).

Travelers at tourist sites had significantly larger travel party sizes (avg. = 3.51) compared to their winery (avg. = 3.20) and VIC counterparts (avg. = 3.03). Tourist site travelers were also significantly more likely to be traveling with children (38%) compared to visitors at VICs (32%) and wineries (25%). There were no significant differences with respect to the average travel party size for parties with or without children amongst the various survey groups (Table 2).

Table 2. Traveler demographics.

	Percentage of Respondents By Survey Group <sup>1</sup>			
	Tourist Sites	Wineries	VICs	Overall Sample
<b>Origin</b>				
British Columbia	42.9%	48.3%	31.4%	41.5%
US	6.5%	9.1%	8.9%	7.9%
Overseas	12.7%	6.4%	14.1%	11.2%
Other Canada	38.0%	36.0%	46.0%	39.0%
<b>Gender</b>				
Male	49.4%	53.0%	53.9%	51.6%
Female	50.6%	47.0%	46.1%	48.4%
<b>Age*</b>				
Under 24 Years	11.4%	4.8%	9.0%	8.9%
25-34 Years	20.2%	23.2%	23.3%	21.9%
35-44 Years	27.3%	27.1%	27.3%	27.2%
45-54 Years	21.8%	25.4%	21.3%	22.7%
55-64 Years	10.7%	13.7%	14.3%	12.5%
65 Years or Older	8.5%	5.9%	4.8%	6.8%
<b>Education*</b>				
Less Than High School	2.8%	1.5%	2.0%	2.2%
High School	20.8%	12.8%	13.8%	16.7%
Some Technical, College or University	11.6%	8.2%	8.6%	9.8%
College of Technical Diploma	21.9%	18.1%	20.5%	20.4%
University Degree	31.5%	40.0%	44.5%	37.2%
Masters or a PhD Degree	10.9%	19.2%	10.7%	13.3%
Other	0.4%	0.2%	0.0%	0.2%
<b>Income*, 2</b>				
Less than \$25,000	9.7%	5.2%	10.3%	8.5%
\$25,000 to \$49,999	16.4%	9.8%	13.6%	13.7%
\$50,000 to \$64,999	15.1%	14.6%	17.3%	15.5%
\$65,000 to \$99,999	27.4%	26.5%	26.9%	27.0%
\$100,000 or More	31.5%	43.9%	32.0%	35.3%
<b>Party Size</b>				
Average Party Size-Total*	3.51	3.20	3.03	3.30
Average Party Size-Parties without children	2.66	2.51	2.27	2.51
Proportion with Children*	37.7%	24.7%	31.5%	32.4%
Average Party Size with children	4.91	5.28	4.68	4.94

\* Indicates there are statistical differences at the p=0.05 level.

1. The total sample size n does not always equal the number of useable surveys presented in Table 1 because some respondents did not complete the full interview.

2. Don't Know's and No Responses were excluded.

## Trip Characteristics

Over two-thirds (71%) of visitors to the Okanagan Valley were traveling for leisure (Table 3). This was most pronounced at VICs (79%) and significantly less so at tourist sites (66%). On the other hand, tourist site travelers were significantly more likely (24%) to be visiting friends and family compared to their VIC counterparts (12%).

Over four-fifths (83%) of travelers to the Okanagan Valley used a car, truck or motorcycle as their primary mode of transportation (Table 3). This pattern was most pronounced at wineries (90%) and significantly less apparent at tourist sites (78%). Use of RVs was highest amongst visitors to VICs whereas use of an airplane was highest amongst visitors to tourist sites (7%).

Over two-fifths (45%) of visitors to the Okanagan Valley used a resort/hotel/motel/B&B for their overnight accommodation (Table 3). This was especially true for travelers at wineries (50%). A significantly higher proportion of VIC respondents (37%) used a campground/RV park compared to tourist site (23%) and travelers at wineries (23%). Similarly, significantly more tourist site travelers (27%) stayed with friends or relatives compared to their VIC counterparts (11%).

Table 3. The primary trip purpose, mode of transportation and primary accommodations of travelers.

	Percentage of Respondents By Survey Group			
	Tourist Sites	Wineries	VICs	Overall Sample
<b>Primary Trip Purpose*</b>				
Leisure	65.5%	73.6%	79.0%	71.3%
Visiting Friends & Family	23.9%	19.1%	11.7%	19.4%
Work/Business Activity	5.4%	2.9%	4.9%	4.5%
Other <sup>1</sup>	5.3%	4.4%	4.4%	4.8%
<b>Mode of Transportation*</b>				
Car/Truck/Motorcycle	78.4%	89.8%	82.4%	82.7%
RV	5.8%	4.2%	7.9%	5.9%
Bus	5.8%	0.7%	3.0%	3.6%
Airplane <sup>2</sup>	7.4%	4.7%	4.8%	5.9%
Other <sup>3</sup>	2.6%	0.6%	2.0%	1.9%
<b>Primary Accommodations*</b>				
Resort/Hotel/Motel/B&B	42.1%	49.7%	43.6%	44.7%
Campground/RV Park	23.3%	23.1%	37.2%	26.7%
Friends or Relatives	26.5%	20.9%	11.1%	20.9%
Other <sup>4</sup>	8.1%	6.4%	8.1%	7.6%

\* Indicates there are statistical differences at the p=0.05 level.

1. Other primary trip purpose included sports camps/tournaments, fruit picking, festivals and events, conferences, buying real estate property, family reunion, looking for work, employment reasons.
2. Almost all used the Kelowna airport (82% at tourist sites, 94% at wineries, 86% at VICs and 85% overall). 17% at tourist sites, 6% at wineries, 14% at VICs and 14% overall used the Penticton airport. 1% at tourist sites and 1% overall used other.
3. Other transportation included bicycles and vans.
4. Other primary accommodation included condo, boarding house, chalet, college campus residence, host family, hostel, house exchange, houseboat, sailboat, timeshare, hostel, cabin, cottage, rentals, summer homes and guest ranch.

Four-fifths (80%) of travelers had a primary destination in the Okanagan Valley (Table 4). This was especially true of tourist site travelers (81%) and less so for those stopping at VICs (75%). Almost one-third (32%) of travelers interviewed in Okanagan Valley had Kelowna as their primary destination.

This was pronounced for winery visitors (38%) but less evident amongst those at tourist sites (29%). Another quarter (25%) of travelers had Penticton as their primary destination. This was especially true for tourist site travelers (35%) and less so for those visiting wineries (9%). A small proportion (8%) of travelers had a primary destination outside of British Columbia.

Table 4. The primary destination of travelers.

Primary Destination	Percentage of Respondents By Survey Group			
	Tourist Sites	Wineries	VICs	Overall Sample
<b>Okanagan Valley</b>	<b>81.3%</b>	<b>77.7%</b>	<b>74.6%</b>	<b>80.0%</b>
Kelowna	29.4%	37.8%	31.0%	32.2%
Penticton	34.8%	8.5%	24.4%	24.6%
Osoyoos	3.1%	8.5%	2.0%	4.4%
Summerland	3.0%	5.0%	3.0%	3.6%
Oliver	2.7%	4.0%	0.0%	2.4%
Vernon	1.3%	2.3%	1.6%	1.7%
Peachland	0.9%	1.7%	1.2%	1.2%
Keremeos	0.4%	0.3%	0.5%	0.4%
Princeton	0.1%	0.1%	0.2%	0.1%
Enderby	0.2%	0.0%	0.0%	0.1%
Other Okanagan Valley	8.4%	9.5%	10.7%	9.3%
<b>Other British Columbia</b>	<b>8.9%</b>	<b>14.0%</b>	<b>17.3%</b>	<b>12.5%</b>
<b>Other-Outside British Columbia</b>	<b>6.8%</b>	<b>8.2%</b>	<b>8.2%</b>	<b>7.6%</b>

On the mailback questionnaire, respondents were asked if this was their first trip to the Okanagan Valley (Table 5). Over one-fifth (23%) of all travelers indicated that they were visiting the Okanagan for the first time. As expected, this was particularly true in the case of VIC visitors where a significantly higher proportion (36%) had never visited the Okanagan before.

Table 5. Previous visitation to the Okanagan Valley.

First Trip to the Okanagan*	Percentage of Respondents By Survey Group			
	Tourist Sites	Wineries	VICs	Overall Sample
Yes	19.8%	17.5%	35.7%	22.5%
No	80.2%	82.5%	64.3%	77.5%

\* Indicates there are statistical differences at the  $p=0.05$  level.

Overall, travelers planned to spend an average of 18 days away from home, 15 days in British Columbia and 8 days in the Okanagan Valley (Figure 5). On average, visitors to the Okanagan Valley spent over four-fifths (83%) of their time away from home in British Columbia (Table 6). This was especially true for VIC travelers (86%) and less so for those visiting wineries (78%). On average, visitors spent almost half (48%) of their time away from home in the Okanagan Valley itself. This was especially true for those interviewed at the tourist sites (56%) and wineries (52%) but less so for VIC travelers (34%). Out of the total amount of time spent by these travelers in British Columbia, an average of almost three-fifths (58%) was spent in the Okanagan Valley. While this was pronounced for tourist site (67%) and winery visitors (67%), VIC visitors spent less than two-fifths (40%) of the time they were in British Columbia in actually visiting the Okanagan Valley.

### Average Number of Days By Survey Location

*How many days will you be away from home?*

*How many of those days will be spent in British Columbia?*

*How many of those days will be spent in the Okanagan Valley?*

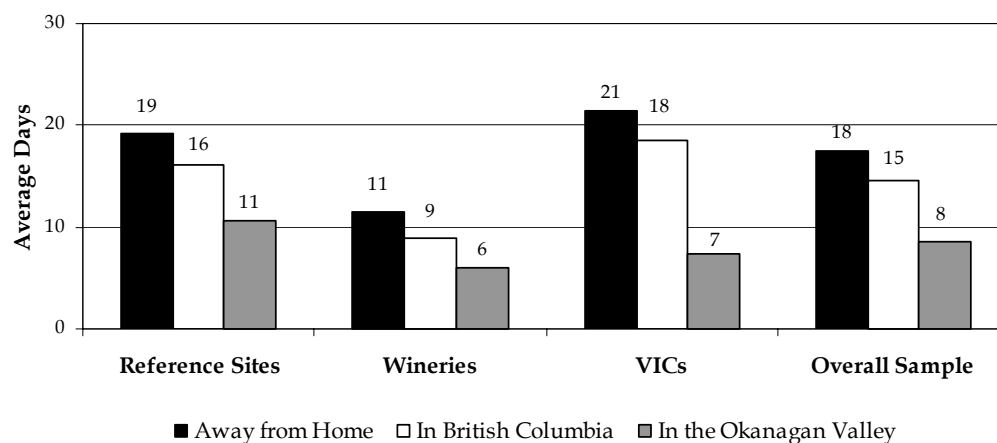


Figure 5. The average number of days spent away from home and in British Columbia by survey group.

Table 6. Proportion of time spent away from home, in British Columbia and in the Okanagan Valley.

Proportion of Time by Destination	Percentage of Respondents By Survey Group			
	Tourist Sites	Wineries	VICs	Overall Sample
Days away from home spent in British Columbia	83.5%	78.4%	86.1%	83.2%
Days away from home spent in the Okanagan Valley	55.6%	52.6%	34.2%	48.4%
British Columbia days spent in the Okanagan Valley	66.7%	67.1%	39.7%	58.2%

### Trip Planning

Over two-thirds (71%) of travelers planned their trips 3 or more weeks in advance while only one tenth of travelers spent less than a week planning their trip (Table 7). This was true for all survey groups. Fewer travelers planned their trip less than one week in advance.

Table 7. Trip planning horizon for travelers.

Trip Planning Horizon	Percentage of Respondents By Survey Group			
	Tourist Sites	Wineries	VICs	Overall Sample
During The Trip	1.4%	0.9%	1.2%	1.2%
Day of Departure	2.4%	1.3%	2.3%	2.1%
1-6 Days	10.4%	10.9%	10.8%	10.7%
1-2 Weeks	14.4%	16.0%	14.5%	14.9%
3-8 Weeks	28.9%	30.5%	29.2%	29.4%
9-12 Weeks	11.6%	13.2%	9.8%	11.6%
13+ Weeks	31.0%	27.1%	32.2%	30.1%

The Internet was the most frequently cited source of information used by travelers planning their trip to the Okanagan Valley (Table 8). A significant proportion of visitors to wineries (44%) and VICs (44%) used this medium compared to those at tourist sites (36%). Word of mouth (35%) and



brochures and books (23%) were the next most frequently used information sources used by these travelers. A significantly higher proportion of respondents at tourist sites (37%) and wineries (37%) relied on word of mouth information than did visitors to VICs (31%). Brochures and books were used by a significantly higher proportion of respondents at VICs (28%) compared to wineries (22%) and tourist sites (21%). Fewer travelers relied on Tourism BC, travel agents/airlines, advertising, media coverage or tour operators/tourism businesses, to plan their trip within British Columbia.

Table 8. Information sources used for trip planning purposes.

Information Sources	Percentage of Respondents By Survey Group			
	Tourist Sites	Wineries	VICs	Overall Sample
Internet*	35.6%	44.4%	44.4%	40.4%
Friends, Relatives, Clubs and other Associations*	37.0%	36.8%	31.0%	35.4%
Brochures and Books*	21.1%	21.5%	28.2%	23.0%
VICs	7.9%	9.9%	20.4%	11.6%
Tourism BC (1-800 # or other)	7.5%	10.2%	9.8%	8.9%
Travel Agents, Airlines, Auto Associations	8.2%	7.3%	9.2%	8.2%
Advertising (Print/TV)	2.5%	3.3%	2.1%	2.6%
Media Coverage	1.5%	1.6%	1.2%	1.5%
Tour Operators/Tourism Specific Businesses	1.8%	0.7%	1.6%	1.4%
Other <sup>1</sup>	31.7%	20.2%	23.7%	26.3%
Don't Know/No Response	3.4%	1.6%	1.0%	2.3%

\* Indicates there are statistical differences at the  $p=0.05$  level.

### Trip Flexibility

Travelers that planned to spend some time in the Okanagan Valley were asked about their flexibility in terms of the activities they would participate in, the amount of time they could spend in the Okanagan Valley and the amount of time they could spend in British Columbia. The vast majority of travelers (88%) were very flexible in the activities that they planned to participate in while in the Okanagan Valley. This was true for every survey group (Figure 6).

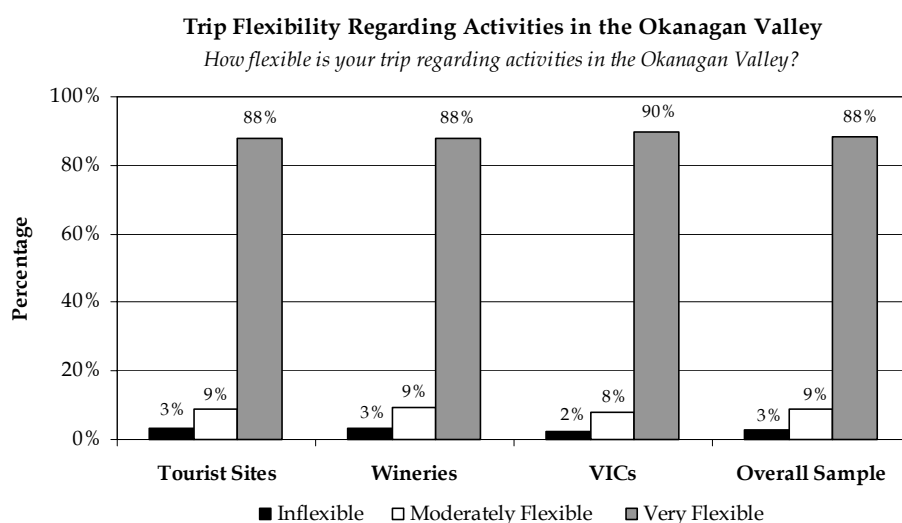


Figure 6. Travelers rating of trip flexibility regarding activities in the Okanagan Valley

Over two-fifths of travelers (46%) were very flexible in the amount of time they could spend in the Okanagan Valley (Figure 7). In this regard, tourist site travelers were the most flexible (50%); travelers at wineries the least (40%). Over two-fifths (41%) of travelers were very flexible in terms of the amount of time they planned to spend in British Columbia (Figure 8). In this regard, tourist site travelers were the most flexible (45%); winery visitors the least (33%). These results indicate that travelers in the three groups were generally similar in their trip flexibility with respect to activities, time in the Okanagan Valley and time in British Columbia.

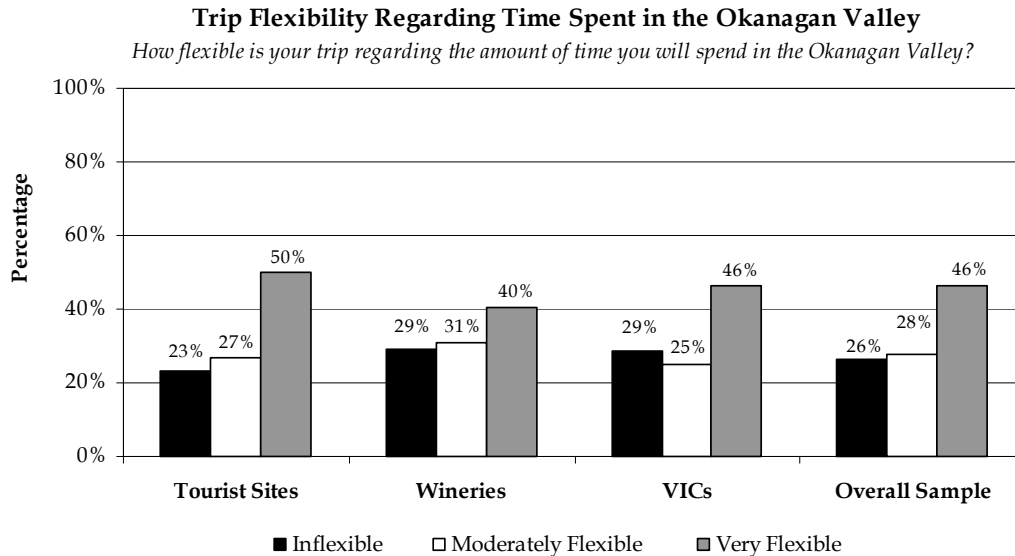


Figure 7. Travelers rating of trip flexibility regarding the time spent in the Okanagan Valley

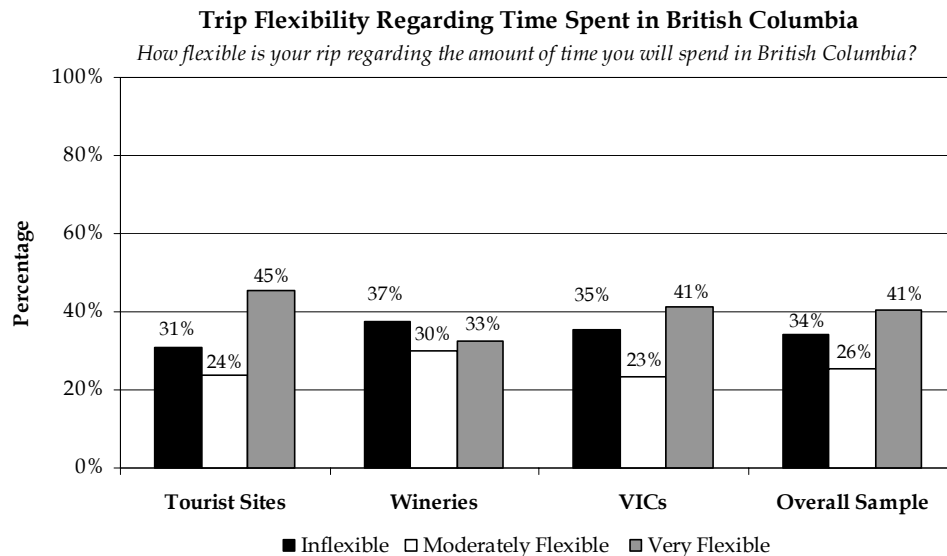


Figure 8. Travelers rating of trip flexibility regarding the time spent in British Columbia

### Traveler Activities

Travelers indicating they would spend time in the Okanagan Valley were asked about their primary activity. Overall, 30% of travelers mentioned beach/sunbathing/swimming as their primary activity (Table 9). This was especially true for tourist site travelers (38%) and less pronounced for

those interviewed at wineries (22%). Spending time visiting wineries was the most popular primary activity amongst travelers at wineries and was cited by almost a quarter (23%) of those interviewed. This indicates that for most travelers at wineries (77%), their visit to the winery was not the primary activity of their trip. Other popular activities mentioned by these travelers included relaxing (18%), sightseeing (10%) and hiking/walking (6%). Fewer travelers in each group indicated they would visit festivals/events or participate in camping or boating activities.

Table 9. Most frequently mentioned primary activities.

Primary Activity	Percentage of Respondents By Survey Group			
	Tourist Sites	Wineries	VICs	Overall Sample
Beach/Sunbathing/Swimming	38.0%	21.7%	24.7%	29.9%
Relaxing	18.9%	19.7%	13.1%	17.7%
Wine/Wineries	2.1%	23.0%	11.6%	10.7%
Sightseeing	9.0%	7.2%	14.5%	9.8%
Hiking/Walking	7.0%	4.2%	7.2%	6.2%
Golfing	2.6%	3.7%	4.8%	3.5%
Visiting	3.4%	4.8%	1.6%	3.3%
Biking/Cycling	3.1%	1.2%	4.6%	2.9%
Touring	3.1%	2.5%	1.8%	2.6%
Outdoor activities/Recreation	2.6%	1.6%	2.3%	2.2%
Eating/Drinking	1.9%	2.7%	1.2%	2.0%
Festivals/Events	1.6%	1.0%	1.8%	1.5%
Camping	0.9%	0.3%	3.0%	1.2%
Boating	1.1%	1.9%	0.7%	1.2%

In addition, travelers were asked if they had participated in or planned to participate in seventeen specific activities (participation rate). In general, participation rates followed a similar pattern across analysis groups (Figures 9, 10, 11, 12). The most popular activities (i.e., the top five participation rates) included swim/other water based activities, visiting a farm/farmers market/orchard/food processor, shopping, nature-based activities and visiting a winery.

Activities with moderate participation include a special dining experience, natural history attractions, family attractions, heritage or historic sites, golf/golf events, sporting event other than golf, museum, arts festivals or events, art galleries, artists studios or heritage festivals or events. Low participation rates existed for First Nations attractions and the wine festival. Participation in the wine festival was expected to be low because the largest wine festival in the Okanagan Valley (Fall Wine Festival) occurred after this data was collected. Although participation rates follow a similar pattern across analysis groups, in eleven out of seventeen activities, significant differences in specific activity participation rates were found to exist between analysis groups (Appendix F-Tables A19, A20).

As a second step to the previous question, travelers that indicated they would participate in a particular activity were asked how important that activity was in planning their current trip. The importance of planning activities followed a similar pattern in all survey groups. A large proportion of travelers in all survey groups indicated that participating in nature-based activities, swimming/other water based activities, visiting a farm/farmers market/orchard/food processor or visiting a winery were important or very important in planning their trip. These four activities also had high participation rates. These four activities are primarily what draw travelers to the Okanagan Valley.

Golf and sporting events other than golf had moderate participation rates but high trip planning importance indicating it is also an important motivator of a generous number of trips to the Okanagan Valley. The wine festival and First Nations attractions had very low participation rates but mid-high importance in trip planning indicating they are important motivator for just a few trips. In contrast, a high percentage of travelers indicated they would shop during their trip but fewer indicated it was important or very important to planning their trip.

In general, the remaining activities had medium and low participation rates but a medium level of importance in planning their trip (Figures 9, 10, 11, 12). In all survey groups visiting a museum had a mid-level participation rate but fewer indicated it was important or very important in planning their trip. This result indicates that travelers are likely to visit a museum on their trip to the Okanagan Valley but for most travelers the museum is not what attracts them to the Okanagan Valley.

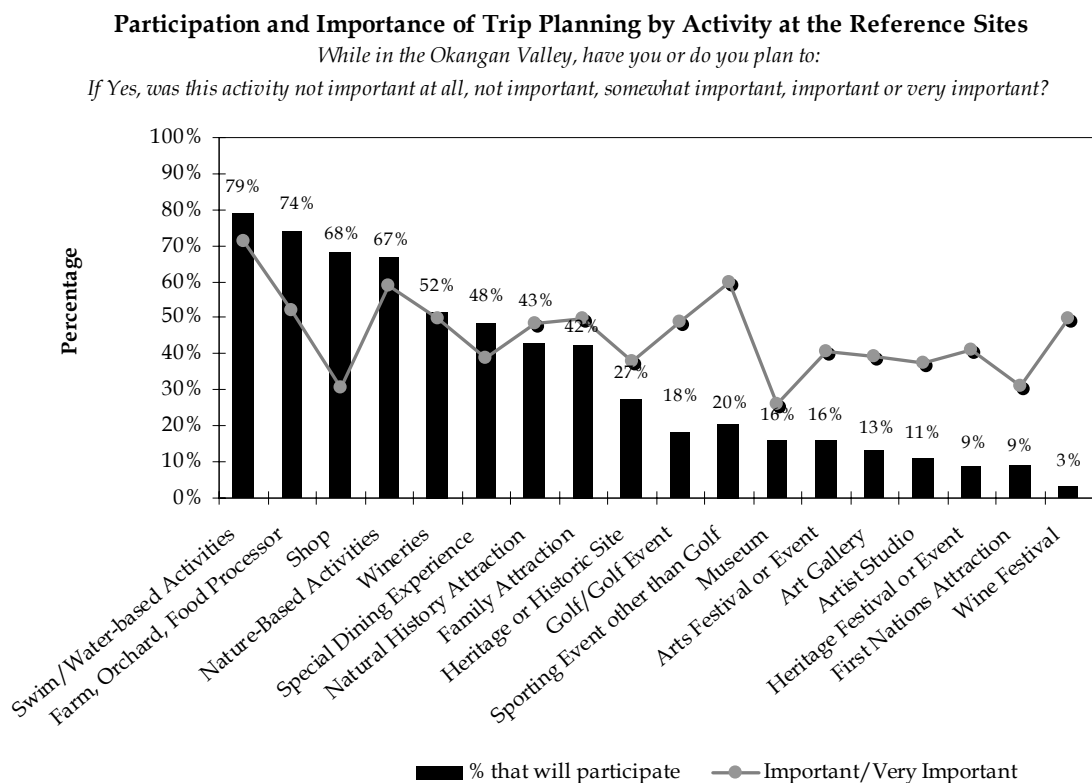


Figure 9. The activities travelers planned to participate in while in the Okanagan Valley (bars) and their importance to planning the current trip (line) at the tourist sites.

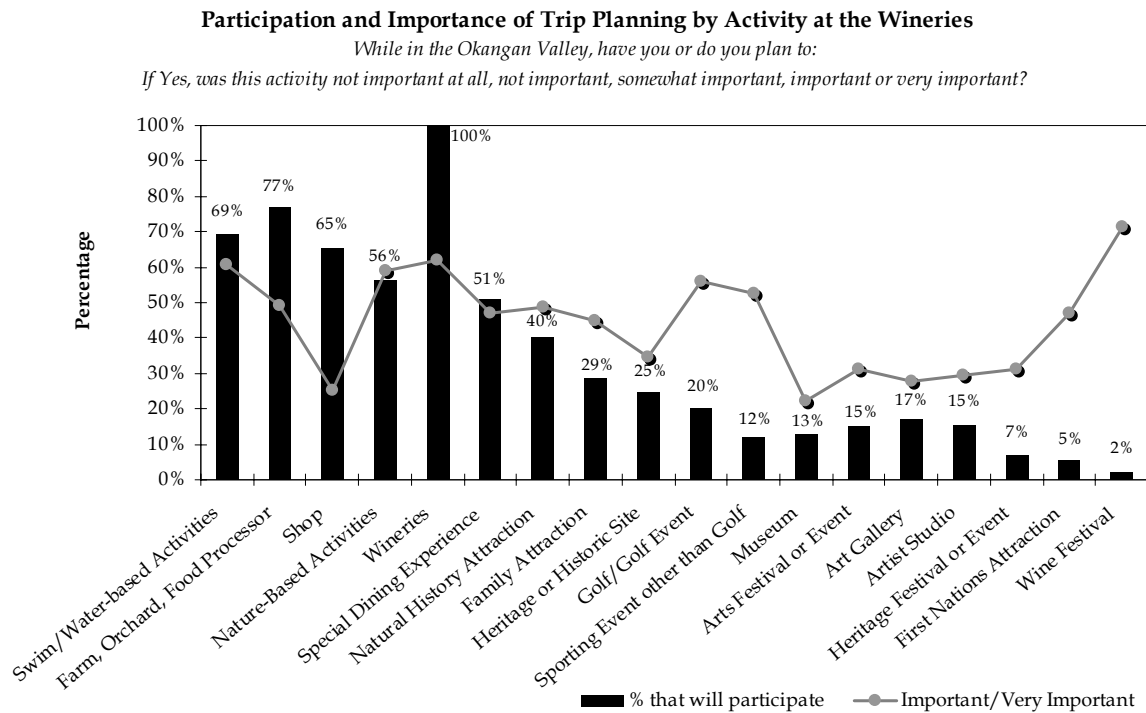


Figure 10. The activities travelers planned to participate in while in the Okanagan Valley (bars) and their importance to planning the current trip (line) at the wineries.

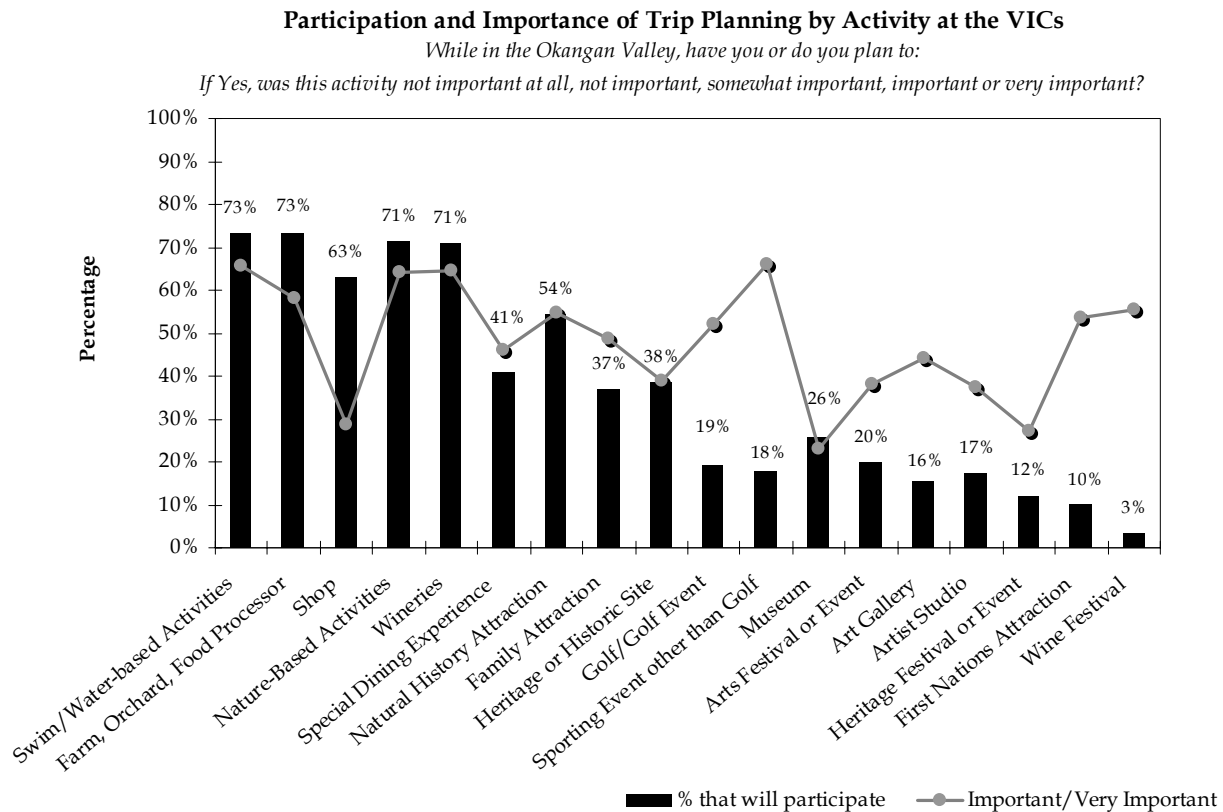


Figure 11. The activities travelers planned to participate in while in the Okanagan Valley (bars) and their importance to planning the current trip (line) at the VICs.

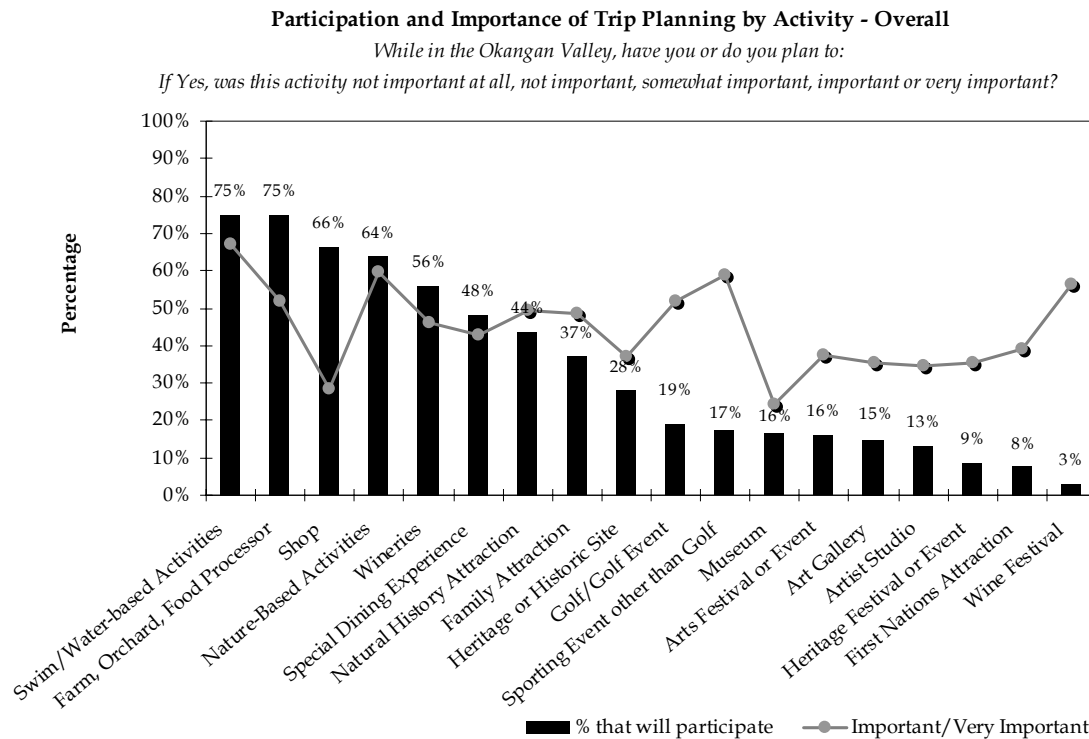


Figure 12. The activities travelers planned to participate in while in the Okanagan Valley (bars) and their importance to planning the current trip (line) for all survey groups (overall).

### Perceptions of the Okanagan Valley and British Columbia

In the mailback questionnaire, travelers were asked *"What positive and/or negative images come to mind when you think of the Okanagan Valley as a vacation destination?"* Positive and negative image questions were asked to obtain an understanding of what travelers perceive the Okanagan Valley to be doing right and what the Okanagan Valley can work on in terms of attracting and keeping travelers in the area. The two most frequently cited images were the beautiful landscape/scenery (68%) and the good climate (65%; Table 10). These responses were consistent across the three survey groups. Other positive images were the wineries/vineyards (23%), variety of things to do (22%), the friendly/helpful people (18%), beach/water activities (17%) and the orchards (16%).

Table 10. Most frequently mentioned positive images of the Okanagan Valley.

Positive Image	Percentage of Respondents By Survey Group <sup>1</sup>			
	Tourist Sites	Wineries	VICs	Overall Sample
Beautiful landscape/scenery	69.2%	65.4%	68.4%	67.8%
Good climate	67.2%	64.3%	62.1%	65.2%
Wineries/vineyards	9.9%	41.0%	23.2%	23.2%
Lots to do	19.9%	22.0%	24.7%	21.6%
Friendly/helpful people	18.4%	15.0%	23.7%	18.4%
Beach/water activities	22.3%	9.7%	16.3%	16.8%
Fruits/orchards	17.9%	15.9%	12.1%	16.0%
Overall atmosphere	12.9%	14.6%	12.1%	13.3%
Outdoor activities	5.0%	5.1%	11.1%	6.3%
Cleanliness	8.4%	4.6%	3.2%	6.0%
Accessibility	4.7%	3.3%	6.8%	4.7%
Golf/mini-golf	3.7%	5.2%	4.2%	4.3%
Restaurants/food	5.0%	4.8%	1.6%	4.2%

1. Respondents could answer more than once so percentages add up to more than 100%.

The negative image of the Okanagan Valley that was most frequently cited by over a third (36%) of all travelers was the amount of traffic (Table 11). This was especially pronounced amongst winery visitors (40%) and less evident for those visiting VICs (29%). Other top of mind negative images included crowding 20%), the cost (13%), poor access and road signage (13%) and poor weather (hot or raining; 12%). Although not as frequently mentioned, insufficient attractions (10%), busy crowded campgrounds (9%) and social concerns (9%) were other negative images that remained with these visitors to the Okanagan Valley.

Table 11. Most frequently mentioned negative images of the Okanagan Valley.

Negative Image	Percentage of Respondents By Survey Group <sup>1</sup>			
	Tourist Sites	Wineries	VICs	Overall Sample
Traffic	35.2%	40.1%	28.6%	35.6%
Crowding/busy	21.9%	15.4%	25.2%	20.2%
Expensive - in general	11.3%	14.7%	15.1%	13.3%
Poor access/travel roads/signage	13.3%	12.7%	10.9%	12.6%
Poor weather/temperature/climate	9.8%	12.2%	14.3%	11.6%
Insufficient attractions/activities	12.1%	8.1%	6.7%	9.6%
Busy/crowded campgrounds	8.6%	9.0%	10.9%	9.2%
Social concerns	12.1%	6.5%	6.7%	9.0%
Distance from home	8.6%	8.5%	5.9%	8.0%
Expensive accommodation	8.6%	8.2%	5.9%	7.9%
Disappointing experience	7.0%	7.1%	8.4%	7.4%
Too commercial	6.6%	10.6%	3.4%	7.4%

1. Respondents could answer more than once so percentages add up to more than 100%.

Travelers were also asked about the unique characteristics of the Okanagan Valley as a vacation destination on the mailback questionnaire. Unique characteristics of the Okanagan Valley can be used to attract more travelers to the area. Almost three-fifths (56%) of all travelers mentioned the beautiful landscape/scenery in the area as the most unique characteristic of the Okanagan Valley

(Table 12). The weather/temperature was the next most frequently (46%) identified characteristic, followed by wineries/vineyards (44%). This was especially true for winery visitors where over three-fifths (61%) 30% of tourist site travelers associated wineries/vineyards as unique characteristics of the Okanagan. Other unique images frequently cited by these travelers included the orchards (28%), the variety of activities and attractions (18%) and beach/water activities (15%). Fewer travelers mentioned friendly/helpful people (8%), outdoor activities other than beach/golf (5%), the atmosphere (5%), golf/mini-golf (4%) and proximity to home (4%) as unique characteristics of the Okanagan.

Table 12. Most frequently mentioned unique characteristics of the Okanagan Valley.

Unique Characteristics	Percentage of Respondents By Survey Group <sup>1</sup>			
	Tourist Sites	Wineries	VICs	Overall Sample
Scenery/beauty/landscape/lake/location	55.3%	56.3%	56.8%	56.0%
Weather/temperature/climate	48.1%	43.5%	44.8%	45.8%
Wineries/vineyards/wine tasting/wine tours	30.2%	60.9%	45.9%	44.1%
Fruit/produce/vegetables/orchards	33.7%	24.7%	22.4%	28.2%
Variety or services/activities/attractions/recreation	20.3%	14.9%	19.1%	18.2%
Beach/swimming/water activities	17.6%	9.8%	15.3%	14.5%
Friendly/helpful people/service	8.3%	7.7%	7.7%	7.9%
Outdoor activities other than beach/golf	6.1%	2.1%	6.6%	4.9%
Atmosphere	6.4%	3.2%	4.4%	4.9%
Golf/mini-golf	3.5%	5.2%	3.8%	4.2%
Distance - close to home	4.5%	4.6%	2.7%	4.2%

1. Respondents could answer more than once so percentages add up to more than 100%.

In the mailback questionnaire, travelers were also asked about their satisfaction with the Okanagan Valley and the province of British Columbia. The majority of travelers interviewed were 'somewhat or very satisfied' with their trip to the Okanagan Valley (89%) and to British Columbia (96%; Table 13). These levels were consistent regardless of survey group. When asked about their likelihood of returning to the Okanagan Valley and the province of British Columbia, the majority (92%) of travelers indicated they were 'likely or very likely' to take another trip to the Okanagan Valley or within British Columbia (95%).

Almost a fifth (20%) of visitors rated arts and cultural activities as 'important' or 'very important' motivators in their decision to return to the Okanagan Valley (Table 13). This was especially pronounced amongst VIC travelers (24%) and less so amongst those visiting tourist sites (16%). Travelers responded with similar ratings (21%) in response to the importance of arts and cultural activities in their likelihood to return to the province of British Columbia (Table 13). This was particularly true for visitors at wineries (25%) and VICs (25%) and much less so for those visiting the tourist sites (17%).



Table 13. Post-trip evaluation of trip to the Okanagan Valley.

Post-Trip Evaluation	Percentage of Respondents By Survey Group			
	Tourist Sites	Wineries	VICs	Overall Sample
Satisfaction <sup>1</sup> With Trip to Okanagan Valley	88.3%	90.3%	88.5%	89.0%
Satisfaction <sup>1</sup> With Trip to British Columbia	95.5%	96.8%	93.9%	95.6%
Likelihood <sup>2</sup> of Taking Another Trip to Okanagan Valley	92.3%	91.9%	91.2%	91.9%
Likelihood <sup>2</sup> of Taking Another Trip Within British Columbia	95.1%	95.2%	95.1%	95.1%
Importance <sup>3</sup> of Arts and Cultural Activities in Returning to the Okanagan Valley	16.4%	21.8%	23.9%	19.8%
Importance <sup>3</sup> of Arts and Cultural Activities in Returning to British Columbia	16.7%	25.1%	24.6%	21.3%

1. Somewhat or very satisfied. 2. Likely or very likely. 3. Important or very important

## Expenditures

Travelers were asked, "In Canadian Dollars, what were your travel party's total expenditures *yesterday*, including accommodations?" On average, travelers spent \$167 per day (Table 14). Winery visitors spent significantly more (\$188) than did visitors at VICs (\$165) and tourist sites (\$155). British Columbians visiting wineries spent significantly more (\$192) than did their counterparts who visited tourist sites (\$151) and VICs (\$160). Similarly, other Canadian residents visiting wineries also spent significantly more (\$180) than did their counterparts who visited tourist sites (\$149) and VICs (\$163). Differences were less evident between survey groups for US and Overseas travelers.

Table 14. The average daily expenditures of travelers.

	Average Per Party Expenditure (\$CDN) By Survey Group			
	Tourist Sites	Wineries	VICs	Overall Sample
Overall Average Daily Expenditures*	\$154.61	\$188.19	\$164.88	\$167.22
Expenditure by Origin				
British Columbia*	\$151.49	\$191.73	\$159.87	\$166.99
US	\$201.67	\$210.64	\$209.57	\$206.93
Overseas	\$157.72	\$181.14	\$152.28	\$160.10
Other Canada*	\$148.69	\$179.60	\$163.27	\$161.60

\* Indicates there are statistical differences at the p=0.05 level.

The top and bottom 2% of responses were trimmed to ensure an accurate mean daily expenditure.

## Cultural Travelers

Almost two-fifths (37%) of travelers were classified as "Cultural Travelers" based on criteria described earlier in this report (page 3). Significantly more cultural travelers visited wineries (55%) compared to tourist sites (34%) and VICs (22%; Figure 13). The small percentage of cultural travelers at the VIC was probably due to the fact that more travelers were from outside of British Columbia and were visiting the Okanagan Valley for the first time. The majority of those first time travelers did not reply that cultural activities were very important in their trip planning.

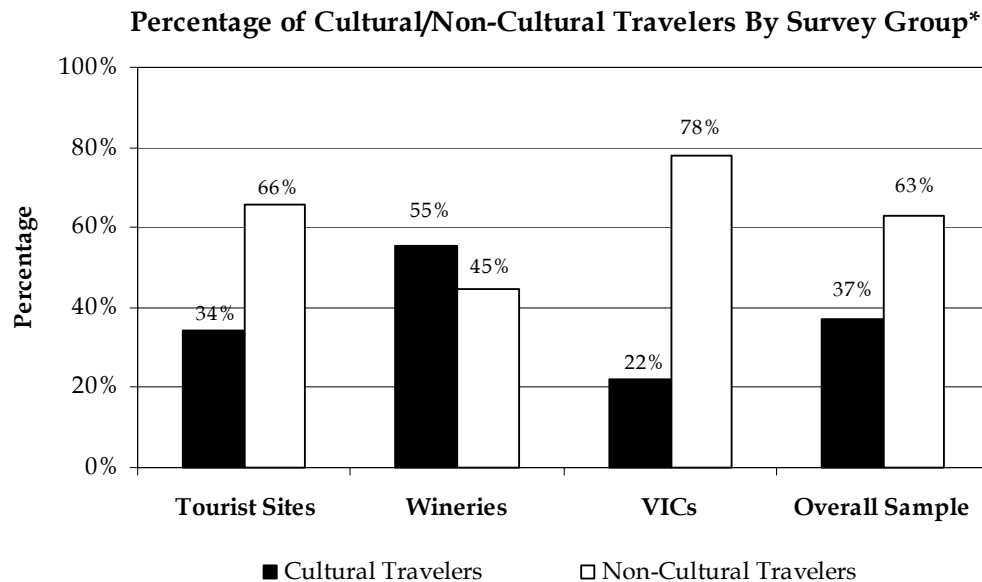


Figure 13. Distribution of Okanagan Valley cultural travelers. \*See definition of cultural travelers on page 3.

The remainder of this section profiles these cultural travelers, comparing them with their non-cultural counterparts on a variety of characteristics. Wherever possible, statistical tests are used to identify instances where significant differences exist between cultural and non-cultural travelers in each survey group as well as overall. Table 15 summarizes instances of significant and/or pragmatic differences found to exist between any of these sub-groups. The remaining tables and figures below can be found in Appendix E (Table A4-A18).

## Traveler Characteristics (Demographics)

Overall, compared to their non-cultural counterparts, cultural travelers to the Okanagan Valley consisted of more British Columbians, were older and had higher incomes (Table 15, A4). Also, cultural travelers were less likely to travel with children than their non-cultural counterparts. Differences between cultural and non-cultural travelers within each survey group were also examined. Cultural travelers at tourist sites were more likely to be older and traveling without children. Cultural travelers at wineries and VICs were significantly more likely to be from British Columbia (Table A4).

## Trip Characteristics

Irrespective of survey group, a higher percentage of cultural travelers traveled for leisure than non-cultural travelers. Although leisure was the primary purpose for most non-cultural travelers, a higher percentage than cultural travelers indicated visiting friends and family was the main purpose of their trip (Table A5). This difference was most pronounced amongst visitors to VICs.

A car/truck/motorcycle was the primary mode of transportation for four-fifths (or more) of cultural and non-cultural travelers across all respondent groups (Table A5). The highest frequency of use for this mode of transportation was reported by visitors to wineries. Use of RV's was most pronounced at VICs while air travelers were more likely to be found amongst travelers at tourist sites.

Overall, a significantly higher proportion of cultural travelers (48%) to the Okanagan Valley used a resort/hotel/motel/B&B (fixed roof) for their accommodation than did non-cultural travelers (42%; Table A5). Although not statistically significant, a slightly higher proportion of cultural travelers at tourist sites (44% vs. 41%) and wineries (54% vs. 44%) stayed in fixed-roof accommodation. A higher proportion of cultural travelers (14%) interviewed at VICs stayed with friends/relatives compared to their non-cultural counterparts (10%; Table A5).

Four-fifths of cultural and non-cultural travelers had a primary destination in the Okanagan Valley. This was especially true for both cultural and non-cultural travelers interviewed at tourist sites (84%) and wineries (78%; Table A6). A higher proportion of cultural travelers (79%) at VICs had a primary destination of the Okanagan Valley compared to their non-cultural counterparts (73%). Almost an eighth of cultural and non-cultural travelers to the Okanagan Valley had a primary destination elsewhere in British Columbia. This was especially true for travelers visiting wineries and VICs.

In comparison to non-cultural travelers, cultural travelers to the Okanagan Valley spent slightly less time away from home and in British Columbia and more time in the Okanagan Valley (Table A7). Cultural travelers to tourist sites spent more time away from home, in British Columbia and in the Okanagan Valley than did non-cultural travelers. In contrast to this, cultural travelers to wineries spent less time away from home but more time in British Columbia and the Okanagan Valley than did their non-cultural counterparts. On the other hand, cultural travelers at VICs spent more time away from home, less time in British Columbia and more time in the Okanagan Valley than did non-cultural travelers.

Irrespective of survey group, cultural travelers reported spending more on average per day than did non-cultural travelers. These differences were significant when comparing all travelers to the Okanagan Valley (\$182 vs. \$157) as well visitors to wineries (\$205 vs. \$166; Table A7).

### **Trip Planning**

Over two-thirds of cultural and non-cultural travelers to the Okanagan Valley planned their trips three or more weeks in advance (Table A8). This was true for all survey groups. However, a slightly higher proportion of cultural travelers compared to non-cultural travelers planned their trips less than 1 week prior to departure. This was especially true for cultural travelers at wineries and to a lesser extent, tourist sites.

With respect to information sources used to plan their trips, cultural travelers to the Okanagan Valley were significantly more likely to use the Internet, travel agents/airlines/auto associations, Tourism BC and print/TV advertising and significantly less likely to use friends/relatives/clubs/associations than were non-cultural travelers (Table A9). Cultural travelers at tourist sites were significantly more likely to use travel agents/airlines/auto associations and print/TV advertising than were their non-cultural counterparts. Similarly, cultural travelers at wineries were significantly more likely to use VICs, Tourism BC and print/TV advertising and significantly less likely to use friends/relatives/clubs/associations than were their non-cultural counterparts. Compared to non-

cultural travelers, cultural travelers at VICs were significantly more likely to use information from Tourism BC to plan their trips.

### **Trip Flexibility**

Irrespective of survey group, cultural and non-cultural travelers were similar with respect to their flexibility in participating in activities while in the Okanagan Valley (Table A10). Cultural travelers were somewhat more flexible than were non-cultural travelers with respect to the amount of time they could spend in the Okanagan Valley and in British Columbia (Table A11, A12).

### **Traveler Activities**

Visiting the beach/sunbathing/swimming was the primary activity most frequently cited by both cultural and non-cultural travelers who indicated they would spend more time in the Okanagan Valley (Table A14). This was true for all survey groups except those visiting wineries where more cultural travelers responded that visiting wineries was their primary activity than visiting the beach by a substantial margin (32% vs. 19%). A low proportion of cultural travelers interviewed at tourist sites (3%) and at VICs (13%) indicated that visiting wineries was the primary activity that motivated their visit to the Okanagan. Other popular primary activities mentioned by cultural and non-cultural travelers included relaxing, sightseeing and hiking/walking. It should be noted that respondents participated in a range of additional activities besides these "primary" activities during their trip.

Travelers were also asked about their participation in seventeen specific activities. Compared to non-cultural travelers, overall, cultural travelers to the Okanagan Valley were significantly more likely to participate in a special dining experience, visit a natural history attraction, participate in nature based activities, attend an arts festival/event, visit a heritage festival/event, visit a First Nations attraction, a heritage or historic site, a museum, a wine festival, a n art gallery, an artist studio or a farm/farmers market/orchard/food processor (Table A13). They were significantly less likely to participate in golf/attend a golf event, participate in swim/other water based activities or visit a family attraction compared to their non-cultural counterparts.

Cultural travelers at VICs were significantly more likely to participate in a special dining experience, visit a natural history attraction, participate in/attend a sporting event other than golf, visit a heritage or historic site, visit a museum, visit an art gallery, an artist studio or a farm/farmers market/orchard/food processor than were their non-cultural counterparts (Table A13).

Compared to non-cultural travelers, cultural travelers at wineries were significantly more likely to participate in a special dining experience, visit a natural history attraction, participate in a nature based activity, attend an arts festival or event, visit a heritage festival/event, visit a heritage or historic site, visit a museum, attend a wine festival, visit an art gallery or artist studio.

Cultural travelers at tourist sites were significantly more likely to participate in a special dining experience, visit a natural history attraction, participate in a nature-based activity, participate in/attend a sporting event other than golf, shop, attend an arts festival or event, visit a heritage or historic site, visit a museum, visit an art gallery, an artist studio or a farm/farmers market/orchard/food processor than were their non-cultural counterparts.

### **Perceptions of the Okanagan Valley and British Columbia**

Beautiful landscape/scenery and good climate were the two most frequently cited positive images of the Okanagan Valley by cultural and non-cultural travelers across all survey groups (Table A15). In almost every case, a greater proportion of non-cultural travelers responded positively to these two images. Other frequently mentioned images included wineries/wineyards, lots to do, friendly/helpful people and fruits/orchards. At VICs and tourist sites, more cultural travelers indicated that wine/wineries were a positive image than non-cultural travelers.

Traffic was the most frequently cited negative image by both cultural and non-cultural travelers to the Okanagan Valley. This was true for cultural and non-cultural travelers at tourist sites and wineries and for non-cultural travelers at VICs (Table A16). On the other hand, cultural travelers at VICs placed more emphasis on the poor weather/temperature/climate as negative images they took home with them. Other frequently mentioned negative images that remained with these visitors included poor access/travel roads/signage, costs and poor weather/temperature/climate, insufficient attractions and busy/crowded campgrounds.

Scenery/beauty/landscape/lake/location, wineries/vineyards/wine tasting/wine tours and weather/temperature/climate were most frequently cited as unique characteristics of the Okanagan Valley (Table A17). This was true for cultural and non-cultural travelers in the various survey groups. Other frequently mentioned unique characteristics included variety of services/activities/attraction/ recreation and fruit/produce/vegetables/orchards.

Compared to non-cultural travelers, cultural travelers visiting the Okanagan Valley expressed higher levels of satisfaction with their trip to British Columbia (overall, wineries) and the Okanagan Valley (overall, tourist sites, wineries and VICs). Cultural travelers also indicated a slightly higher likelihood of taking another trip within British Columbia (overall and wineries) and the Okanagan Valley (overall, wineries and VICs; Table A18). Cultural travelers placed higher importance on the role of Arts and Cultural activities on their return to the Okanagan Valley and to British Columbia than did their non-cultural counterparts. This was true for all survey groups (Table A18).

Table 15. Overview of differences between cultural and non-cultural travelers.

	✓ Indicates a Difference Between Cultural / Non-Cultural Travelers <sup>1</sup>			
	Tourist Sites	Wineries	VICs	Overall Sample
<b>Traveler Characteristics</b>				
Residence Category	-	✓	✓	✓
Gender	-	-	-	-
Age	✓	-	-	✓
Income	-	-	-	✓
Education	-	-	-	-
Party Size	-	-	-	-
Parties with Children	✓	-	-	✓
<b>Trip Characteristics</b>				
Primary Trip Purpose	✓	✓	✓	✓
Mode of Transportation	-	-	-	-
Primary Accommodation	-	-	-	✓
Primary Destination	-	-	-	-
Average Days in British Columbia	-	-	-	-
Average Days in Okanagan Valley	-	-	-	-
Average Days Away from Home	-	-	-	-
Daily Expenditures	-	✓	-	-
Trip Planning Horizons	-	-	-	-
Trip Planning Sources	✓	✓	✓	✓
Trip Flexibility-Activities	-	-	-	-
Trip Flexibility-Time in Okanagan Valley	-	-	-	-
Trip Flexibility-Time in British Columbia	-	✓	-	-
Primary Activities	✓p	✓p	✓p	✓p
<b>Perceptions of the Okanagan Valley and British Columbia</b>				
Positive Images of the Okanagan Valley	✓p	✓p	✓p	✓p
Negative Images of the Okanagan Valley	✓p	✓p	✓p	✓p
Unique Characteristics of the Okanagan Valley	✓p	✓p	✓p	✓p
Satisfaction with trip to Okanagan Valley	-	-	-	-
Satisfaction with trip to British Columbia	-	-	-	-
Likelihood of Taking Another Trip to Okanagan Valley	-	-	-	-
Likelihood of Taking Another Trip to British Columbia	-	-	-	-
Importance of Arts and Cultural Activities in Returning to the Okanagan Valley	-	-	-	-
Importance of Arts and Cultural Activities in Returning to British Columbia	-	-	-	-

1. For questions that were quantitative in nature, only differences that are statistically significant are reported. Pragmatic differences (denoted ✓p) are reported in cases where statistical differences exist but are limited due to insufficient sample sizes or where no significant difference are found but there exist differences in magnitude of 10% or more between the respondent groups. Differences were not tested statistically for the questions that were qualitative in nature including primary activities, positive images, negative images and unique characteristics. In each of these cases results were examined for pragmatic differences (i.e. differences in magnitude of 10% or more between respondent groups) and where such differences were found to exist, they have been denoted by p.

## Conclusions

1. This study revealed that in the summer of 2002, significant differences in trip and traveler characteristics of travelers interviewed in each study group existed (tourist sites, wineries and VICs).
2. The profile of Okanagan Valley travelers can be applied in several different ways.
  1. To add to or to serve as a valuable resource of primary market intelligence.
  2. To design a marketing plan to attract travelers who do not currently visit specific attractions. For example, a plan could be designed to attract travelers to wineries who were visiting friends and family.
  3. To identify regional issues that are important to these visitor groups (i.e. improving traffic flows and preserving scenic values).
3. The profile of travelers at tourist sites, wineries and VICs can be used for business planning and management of new and existing tourism businesses in the Okanagan Valley. The data presented here provides details on the type of clients new tourism businesses in the Okanagan Valley can expect.
4. Overall, the majority of travelers in all three groups (81% tourist sites, 78% wineries and 75% VICs) had the Okanagan Valley as their primary destination on their current trip. Travelers indicated that unique characteristics of the Okanagan Valley as a vacation destination were the beautiful landscape/scenery, the good weather and wineries/ vineyards. These characteristics should continue to be used in marketing efforts to attract travelers to the Okanagan Valley.
5. Over one-third (34%) of tourist site travelers, almost three-fifths (55%) of winery respondents and over a fifth (22%) of those interviewed at VICs were classified as "Cultural Travelers". The percentage of cultural travelers in each study group will be used to monitor the success of the OCCP over time. As the Okanagan Valley emerges as a cultural destination, cultural activities should be important in trip planning to more travelers which is reflected in the definition of cultural travelers.
6. Travelers at wineries spent more money on average per day than those at tourist sites or VICs. Furthermore, cultural travelers interviewed at the wineries spent more money on average than non-cultural travelers.
7. Beautiful landscape/scenery and good climate were the two most frequently cited positive images of the Okanagan Valley by cultural and non-cultural travelers. Although a higher proportion of cultural travelers indicated wineries were a positive image of the Okanagan Valley. Traffic was the most frequently cited negative image by cultural and non-cultural travelers to the Okanagan Valley.
8. Compared to non-cultural travelers, cultural travelers visiting the Okanagan Valley expressed higher levels of satisfaction with their trip to British Columbia and the Okanagan Valley.

Cultural travelers also indicated a slightly higher likelihood of taking another trip within British Columbia and the Okanagan Valley.

9. Cultural travelers placed higher importance on the role of arts and cultural activities on their return to the Okanagan Valley and to British Columbia than did their non-cultural counterparts. Overall, the importance of arts and culture in the likelihood to return to the Okanagan Valley was similar to the importance of arts and culture in the likelihood of returning to British Columbia. This indicates that the travelers do not perceive the Okanagan Valley as a cultural destination anymore than they perceive British Columbia as a cultural destination.



## Implications for the Existing OCCP Marketing Plan

The OCCP steering committee developed a marketing plan that was published in the spring of 2003. Unfortunately, the results outlined in this report were not yet available. Therefore, the plan was based on information that was dated or not directly representative of the Okanagan Valley. Data presented here can be used to update the marketing plan. Following are a few key points in regard to the marketing plan.

1. The marketing plan outlines the target market demographics as affluent, mature and senior couples who are highly educated. Data collected here mirror those demographics.
2. The marketing plan highlights the importance of travelers that are visiting friends and relatives. Data presented here indicates that the segment of the market is not as important as described in the plan. Between 12 and 24% of travelers indicated they are in the Okanagan Valley to visit friends and family and similar proportions indicated they stayed at friends and relatives. Travelers indicated they were traveling for leisure and staying in a hotel/motel or in a campground/RV park.
3. The marketing plan indicated the importance of diversifying its target market and attracting more families to cultural attractions. This fact is supported by the data presented here. Only 25% of travelers at wineries and 27% of cultural travelers (compared to 36% non-cultural travelers) are traveling with children.
4. The marketing plan recommends a healthy amount of OCCP resources be spent on world wide web presence. This recommendation is supported by the fact that in the data presented here, the Internet is the top source of information for trip planning.
5. Most travelers indicated they were 'very flexible' in the activities that they would participate in while in the Okanagan Valley. This indicates there is potential to 'lure' current travelers to cultural attractions once they have reached the Okanagan Valley even if they had not planned to participate in those attractions prior to their trip.
6. Landscape/scenery, the weather, wineries and the variety of things to do were the top positive images for all groups of travelers interviewed. Any future marketing materials produced should take advantage of the characteristics of the Okanagan Valley.
7. Most travelers in all study groups were traveling by car/truck or RV and furthermore, one of the negative images cited was the lack of highway signs. These results suggest a comprehensive highway signage program is needed as recommended in the marketing plan.
8. A high proportion of repeat visitors to the Okanagan Valley suggest that a frequent user card/pass as recommended by the marketing plan would be beneficial in diversifying participation in cultural activities.

## **Limitations**

1. These results are representative of travelers that stopped in the Okanagan Valley between June 19 and September 13 of 2002. Trip and traveler characteristics of visitors at other times of the year could differ from those interviewed.
2. These results are representative of travelers that were interviewed from outside of the Okanagan Valley. This study did not explore the attributes of residents of the Okanagan Valley.
3. Results presented here do not represent the full range of analysis that can be completed with the data collected. Please contact Krista Morten, Research Services Tourism British Columbia for additional information.

## **Appendices**

Appendix A - Interviewer schedule and interviews completed

Appendix B - Questionnaires (Winery Examples)

Appendix C - Seasonal Consideration for Winery Data

Appendix D - Response Bias Testing

Appendix E - Cultural Travelers

Appendix F - Traveler Activities

**Appendix A-Interview Schedule and Interviews Completed**

Table A1. The days that interviews were conducted and number of interviews conducted at participating sites during the study period.

	<b>Tourist Sites</b>	<b>Wineries</b>	<b>VICs</b>
19-Jun	6		13
20-Jun	60		
23-Jun		11	
24-Jun	74	16	
25-Jun	13		41
26-Jun	22		
27-Jun		8	
29-Jun		47	
30-Jun	46		1
<b>Total June</b>	<b>221</b>	<b>82</b>	<b>55</b>
1-Jul	10		46
2-Jul	64		4
3-Jul	32		
6-Jul	31		
7-Jul			48
8-Jul	48		
9-Jul		34	
12-Jul	55		
13-Jul		4	22
14-Jul		41	
18-Jul			49
19-Jul		32	
20-Jul	10	17	
21-Jul	4		
24-Jul	62		
25-Jul	30	17	
26-Jul		49	
27-Jul			62
29-Jul			14
30-Jul	26	20	
31-Jul		48	
<b>Total July</b>	<b>372</b>	<b>262</b>	<b>245</b>

Continued

Table A1. The days that interviews were conducted and number of interviews conducted at participating sites during the study period. (continued)

	<b>Tourist Sites</b>	<b>Wineries</b>	<b>VICs</b>
1-Aug			27
5-Aug	40	23	
6-Aug	14	22	
7-Aug			56
8-Aug		43	
11-Aug		46	
12-Aug	27	18	
13-Aug	43		
14-Aug			44
17-Aug	13		
18-Aug	50		
19-Aug			42
20-Aug		40	
21-Aug	34		
23-Aug		47	
24-Aug			47
25-Aug			18
26-Aug	55		
29-Aug	57		
30-Aug	39		
31-Aug		40	
<b>Total Aug.</b>	<b>372</b>	<b>279</b>	<b>234</b>
1-Sep		45	
5-Sep	34		
6-Sep	5	33	
7-Sep			35
8-Sep	29		
11-Sep	40		
12-Sep	32		
13-Sep			40
<b>Total Sept.</b>	<b>140</b>	<b>78</b>	<b>75</b>
<b>Grand Total</b>	<b>1,105</b>	<b>701</b>	<b>609</b>

## **Appendix B-Questionnaires (Winery Examples)**

On-site Interview and Mailback Questionnaire

## **Appendix B: On-Site Interview**



Would you have ten or fifteen minutes to answer some questions? If you participate, we would like to give you a complimentary SuperNatural BC refrigerator magnet for your time.

☐ YES ☐ NO

Are you a resident of the Okanagan Valley? By Okanagan Valley we mean between Enderby and Osoyoos

☐ NO ☐ YES

Are you part of an organized tour group?

☐ NO ☐ YES

Where are you from? **Prov.** \_\_\_\_\_ **State** \_\_\_\_\_ **Country (Overseas)** \_\_\_\_\_

If Canada or US, what is your postal code? \_\_\_\_\_

What is the **primary** purpose of your trip to British Columbia? Is it for Leisure, Visiting Friends and Family or Business?

☐ LEISURE ☐ VISIT FRIENDS & FAMILY ☐ WORK/BUSINESS ACTIVITY ☐ OTHER \_\_\_\_\_

What is your primary destination? \_\_\_\_\_

How did you get to the Okanagan Valley? Was it by

☐ CAR/TRUCK ☐ RV ☐ BUS ☐ AIRPLANE Which airport did you use?  
☐ PENTICTON ☐ KELOWNA ☐ KAMLOOPS ☐ OTHER \_\_\_\_\_  
☐ OTHER \_\_\_\_\_

What day did you leave your residence on this trip? \_\_\_\_/\_\_\_\_ month/day

When did you enter British Columbia? \_\_\_\_/\_\_\_\_ month/day

What day do you plan to return to your residence? \_\_\_\_/\_\_\_\_ month/day

To confirm, you will be gone for a total of \_\_\_\_ days

How many of those days will be spent traveling in British Columbia? \_\_\_\_\_ days

How many of those days will be spent in the Okanagan Valley? \_\_\_\_\_ days

If WORK/BUSINESS what is the likelihood that you will return for leisure?

☐ NOT LIKELY AT ALL ☐ NOT LIKELY ☐ SOMEWHAT LIKELY ☐ LIKELY ☐ VERY LIKELY

If NOT LIKELY AT ALL or NOT LIKELY why not? \_\_\_\_\_

If SOMEWHAT LIKELY, LIKELY or VERY LIKELY why? \_\_\_\_\_

**That completes the interview for business travelers. Thank-You for Participating!!**

Which of the following best describes your **primary** (most often used) type of accommodation? Is it a

☐ Resort/Hotel/Motel/B&B ☐ Campground/RV ☐ Friends Or Relatives ☐ OTHER \_\_\_\_\_

In Canadian dollars, what were your travel party's total expenditures yesterday, including accommodation?

\$\_\_\_\_\_ ☐ BEGAN TRIP TODAY

How flexible is your trip regarding the activities you will participate in while in the Okanagan Valley? Is it

☐ INFLEXIBLE (all activities are planned) ☐ MODERATELY FLEXIBLE (about half of activities are planned) ☐ VERY FLEXIBLE (less than half of activities are planned)

How flexible is your trip regarding the amount of time you will spend in the Okanagan Valley? Is it

☐ INFLEXIBLE (You have to depart at a set time) ☐ MODERATELY FLEXIBLE (You can change the time of the day for departure) ☐ VERY FLEXIBLE (You can change the day of departure)

How flexible is your trip regarding the amount of time you will spend in the BC? Is it

☐ INFLEXIBLE

(You have to depart at a set time)

☐ MODERATELY FLEXIBLE (You can change the time of the day for departure)

☐ VERY FLEXIBLE

(You can change the day of departure)

While in the Okanagan Valley, have you or do you plan to:			If YES, Was this activity NOT IMPORTANT AT ALL, NOT IMPORTANT, SOMEWHAT IMPORTANT, IMPORTANT or VERY IMPORTANT?				
	NO	YES	NOT IMPORTANT AT ALL	NOT IMPORTANT	SOMEWHAT IMPORTANT	IMPORTANT	VERY IMPORTANT
Participate in a Special Dining Experience (fine dining, local cuisine)			1	2	3	4	5
Golf or Attend a Golf Event			1	2	3	4	5
Swim/Other Water-based Activities (water-skiing, windsurfing, boating)			1	2	3	4	5
Visit a Natural History Attraction (scenic landscape, garden, natural resource interpretation site)			1	2	3	4	5
Participate in Nature-Based Activities (wildlife viewing, hunting or fishing, walking, hiking or cycling or visiting a regional or provincial park)			1	2	3	4	5
Participate in or Attend a Sporting Event other than Golf			1	2	3	4	5
Shop			1	2	3	4	5
Attend an Arts Festival or Event (theatre, dance performance, musical concert, film festival or a poetry or literary reading)			1	2	3	4	5
Visit a Heritage Festival or Event			1	2	3	4	5
Visit a First Nations Attraction			1	2	3	4	5
Visit a Heritage or Historic Site			1	2	3	4	5
Visit a Museum			1	2	3	4	5
Visit a Family Attraction (Waterslides, Miniature Golf, etc.)			1	2	3	4	5
Visit a Wine Festival			1	2	3	4	5
Visit an Art Gallery			1	2	3	4	5
Visit an Artist Studio			1	2	3	4	5
Visit a Farm, Farmers Market, Orchard or Food Processor			1	2	3	4	5

What is your primary leisure activity while in the Okanagan Valley? \_\_\_\_\_ ☐ NONE

Overall, how important was *visiting wineries in general* in planning this trip to the Okanagan Valley? Was it:

☐ NOT IMPORTANT AT ALL

☐ NOT IMPORTANT

☐ SOMEWHAT IMPORTANT

☐ IMPORTANT

☐ VERY IMPORTANT

Overall, how important was visiting *this winery* in planning this trip to the Okanagan Valley? Was it:

☐ NOT IMPORTANT AT ALL

☐ NOT IMPORTANT

☐ SOMEWHAT IMPORTANT

☐ IMPORTANT

☐ VERY IMPORTANT

Overall, how important were Arts and Culture activities in planning this trip to the Okanagan Valley? Were they:

- ☐ NOT IMPORTANT AT ALL    ☐ NOT IMPORTANT    ☐ SOMEWHAT IMPORTANT    ☐ IMPORTANT    ☐ VERY IMPORTANT

How far in advance did you plan your trip?

- ☐ DURING THE TRIP    ☐ DAY OF DEPARTURE    ☐ 1-6 DAYS    ☐ 1-2 WEEKS    ☐ 3-8 WEEKS    ☐ 9-12 WEEKS    ☐ 13 WEEKS+

What information sources did you use to plan your trip? \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_

Including yourself, how many people are in your travel party today? How many are children under 18 and how many are adults?

\_\_\_\_\_ Adult(s) \_\_\_\_\_ Child(ren) (under 18) = \_\_\_\_\_ Total

In which of the following age category are you?

- ☐ A. UNDER 24 YEARS    ☐ E. 55-64 YEARS  
☐ B. 25-34 YEARS    ☐ F. 65 YEARS OR OLDER  
☐ C. 35-44 YEARS    ☐ G. DK/NR  
☐ D. 45-54 YEARS

What is the highest level of education that you have completed?

- ☐ A. LESS THAN HIGH SCHOOL    ☐ E. UNIVERSITY DEGREE  
☐ B. HIGH SCHOOL    ☐ F. MASTERS/PHD DEGREE  
☐ C. SOME TECHNICAL COLLEGE OR UNIVERSITY    ☐ G. OTHER \_\_\_\_\_  
☐ D. COLLEGE OR TECHNICAL DIPLOMA    ☐ H. DK/NR

Before taxes, in Canadian dollars, what is your approximate annual household income?

- ☐ A. LESS THAN \$25,000    ☐ D. \$65,000 to \$99,999  
☐ B. \$25,000 to \$44,999    ☐ E. \$100,000 PLUS  
☐ C. \$45,000 to \$64,999    ☐ F. DK/NR

**As a follow-up to this interview, we would like to contact you after you get home to inquire about the remainder of your trip. Participation would involve completing one short questionnaire that will be mailed to you. In exchange, we are pleased to offer you one free edition of British Columbia Magazine and a chance to win a digital camera. All contact information will be kept confidential and only used for this study. Would you like to participate?**

- ☐ NO    ☐ YES

If **YES**-can I get your name and mailing address?

Name:
Mailing Address:
City:
Country:
Postal Code (If Outside North America) :

**Thank-You For Participating!!**

## **Appendix B: Mailback Questionnaire**

# ***Your trip to the Okanagan Valley:***

## ***What was your experience?***



Please return your completed questionnaire in the enclosed envelope to:

**Tourism British Columbia  
Research Services  
Box 9830, Stn Prov Gov't, 300-1803 Douglas St.  
Victoria, BC Canada V8W 9W5**

**Section 1** – This first section asks questions about characteristics of your trip within British Columbia. *Please answer all of the following questions in regard to the trip that we encountered you at a winery in the Okanagan Valley.*

1. How many days did you spend away from home on the trip that we encountered you on? *Fill in the most appropriate response.*  
 \_\_\_\_\_ DAY(S) AWAY FROM HOME
  
2. How many of those days were spent in British Columbia? If you are from British Columbia and you spent your whole vacation within the province, this reply should equal your reply to question 1. *Fill in the most appropriate response.*  
 \_\_\_\_\_ DAY(S) IN BRITISH COLUMBIA
  
3. How many of those days were spent in the Okanagan Valley? By the Okanagan Valley, we mean from Enderby at the north end to Osoyoos at the south end. *Fill in the most appropriate response.*  
 \_\_\_\_\_ DAY(S) IN THE OKANAGAN VALLEY
  
4. What was the primary purpose of your trip in British Columbia? *Circle the most appropriate response.*
  - A. LEISURE
  - B. VISIT FRIENDS AND FAMILY
  - C. WORK OR BUSINESS ACTIVITY
  - D. OTHER (*Specify*) \_\_\_\_\_
  
- 5a. Was your primary destination within the Okanagan Valley? *Circle the most appropriate response.*
  - A. YES → What was your primary destination within the Okanagan Valley? \_\_\_\_\_
  - B. NO → What was your primary destination? \_\_\_\_\_ Go to Q5c.
  - C. DON'T KNOW
  
- 5b. Did you consider any other destinations when planning your trip to the Okanagan Valley? *Circle the most appropriate response.*
  - A. YES → Where? (*Specify*) \_\_\_\_\_
  - B. NO \_\_\_\_\_
  - C. DON'T KNOW \_\_\_\_\_
  
- 5c. Why did you decide to come to the Okanagan Valley? *Fill in the most appropriate response.*  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
  
6. Was this your first trip to the Okanagan Valley? *Circle the most appropriate response.*
  - A. YES
  - B. NO → How many trips have you previously made? (*Specify*) \_\_\_\_\_ trips
  - C. DON'T KNOW

7a. Have you ever attended a wine festival in British Columbia? *Circle the most appropriate response.*

- A. YES → Go to 7b
- B. NO → Go to 8
- C. DON'T KNOW

7b. Which wine festivals have you attended? *Circle all that apply or fill in the appropriate wine festival in the other category.*

- A. ICEWINE FESTIVAL AT SUN PEAKS
- B. OKANAGAN SPRING WINE FESTIVAL
- C. OKANAGAN SUMMER WINE FESTIVAL
- D. OKANAGAN FALL WINE FESTIVAL
- E. OTHER \_\_\_\_\_

8. Which of the following best describes your **primary** (most often used) type of accommodation while in British Columbia? *Circle the most appropriate response.*

- A. RESORT / HOTEL / MOTEL / BED AND BREAKFAST
- B. CAMPGROUND/RV PARK
- C. FRIENDS OR RELATIVES
- D. OTHER (Specify) \_\_\_\_\_

## **S**ection 2 – This section asks questions about your daily expenditures while in British Columbia.

9. On the trip we encountered you, what do you estimate was your travel party's average **DAILY** expenditure while in British Columbia? *Fill in the appropriate amount in Canadian dollars.*

\$ \_\_\_\_\_ CANADIAN DOLLARS

10. Approximately what percentage of your average daily expenditure (24 hr. period) in British Columbia was attributable to each of the following categories: *Fill in the appropriate proportion.*

\_\_\_\_\_ % ACCOMMODATION  
 \_\_\_\_\_ %TRANSPORTATION  
 \_\_\_\_\_ %FOOD AND BEVERAGE  
 \_\_\_\_\_ %SHOPPING  
 \_\_\_\_\_ %ATTRACTIONS  
 \_\_\_\_\_ %OUTDOOR RECREATION  
 \_\_\_\_\_ %OTHER ENTERTAINMENT  
 \_\_\_\_\_ %OTHER (Specify) \_\_\_\_\_  
 = 100%

### Section 3 – This section asks questions about the use of Visitor Info Centres while in the Okanagan Valley.

11. Did you visit a Visitor Info Centre in the Okanagan Valley?

- A. YES → Where? (Specify) 1. \_\_\_\_\_ Go to Q12  
 B. NO → Go to Q152. \_\_\_\_\_  
 C. DON'T KNOW → Go to Q153. \_\_\_\_\_

12. How useful was the information that you received at that Visitor Info Centre (evaluate the first Visitor Info Center you listed in question 10)? *Circle the most appropriate response.*

- A. NOT USEFUL AT ALL  
 B. NOT USEFUL  
 C. SOMEWHAT USEFUL  
 D. USEFUL  
 E. VERY USEFUL  
 F. DID NOT RECEIVE ANY INFORMATION  
 G. DON'T KNOW

13. Overall, how well did that Visitor Info Centre live up to your original expectations? *Circle the most appropriate response.*

- A. FELL SHORT  
 B. MET  
 C. EXCEEDED  
 D. DON'T KNOW

14. Why didn't you visit a Visitor Info Centre in the Okanagan Valley? *Please fill in the appropriate response.*

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

### Section 4 – This section asks questions about the Okanagan Valley (between Enderby and Osoyoos) as a vacation destination.

15. What positive and/or negative images come to mind when you think of the Okanagan Valley as a vacation destination? *Please list up to three positive and three negative images.*

Positive	Negative
1. _____	1. _____
2. _____	2. _____
3. _____	3. _____



16. What are the unique characteristics of the **Okanagan Valley** as a vacation destination? Unique characteristics are those that make the Okanagan Valley different from other destinations. **Please fill in up to three unique characteristics.**
1. \_\_\_\_\_
  2. \_\_\_\_\_
  3. \_\_\_\_\_
17. Overall, how satisfied or dissatisfied were you with your trip to the **Okanagan Valley**? *Circle the appropriate response.*
- A. VERY DISSATISFIED
  - B. SOMEWHAT DISSATISFIED
  - C. NEITHER SATISFIED OR DISSATISFIED
  - D. SOMEWHAT SATISFIED
  - E. VERY SATISFIED
  - F. DON'T KNOW
18. Given your experience in the **Okanagan Valley**, how likely are you to return for a future leisure trip? *Circle the appropriate response.*
- A. NOT LIKELY AT ALL
  - B. NOT LIKELY
  - C. SOMEWHAT LIKELY
  - D. LIKELY
  - E. VERY LIKELY
  - F. DON'T KNOW
19. How important are arts and cultural activities or events in deciding the likelihood of returning to the **Okanagan Valley** on a leisure trip? **Circle the appropriate response.**
- A. NOT IMPORTANT AT ALL
  - B. NOT IMPORTANT
  - C. SOMEWHAT IMPORTANT
  - D. IMPORTANT
  - E. VERY IMPORTANT
  - F. DON'T KNOW

## **S**ection 5 – This section asks questions about **British Columbia** as a vacation destination.

20. Overall, how satisfied or dissatisfied were you with your trip in **British Columbia**? *Circle the appropriate response.*
- A. VERY DISSATISFIED
  - B. SOMEWHAT DISSATISFIED
  - C. NEITHER SATISFIED OR DISSATISFIED
  - D. SOMEWHAT SATISFIED
  - E. VERY SATISFIED
  - F. DON'T KNOW

21. Are you a resident of British Columbia?

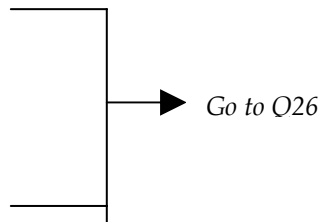
- A. YES → Go to Q24
- B. NO → Go to Q22
- C. DON'T KNOW

22. Given your experience in **British Columbia**, how likely are you to return for a future vacation? *Circle the appropriate response.*

- A. NOT LIKELY AT ALL
- B. NOT LIKELY
- C. SOMEWHAT LIKELY
- D. LIKELY
- E. VERY LIKELY
- F. DON'T KNOW

23. How important are arts and cultural activities or events in deciding to return to **British Columbia** on a vacation? *Circle the appropriate response.*

- A. NOT IMPORTANT AT ALL
- B. NOT IMPORTANT
- C. SOMEWHAT IMPORTANT
- D. IMPORTANT
- E. VERY IMPORTANT
- F. DON'T KNOW



24. Given your experience traveling in **British Columbia** on this trip, are you more or less likely to take another vacation within British Columbia? *Circle the appropriate response.*

- A. MUCH LESS LIKELY
- B. LESS LIKELY
- C. NEITHER MORE OR LESS LIKELY
- D. MORE LIKELY
- E. MUCH MORE LIKELY
- F. DON'T KNOW

25. How important are arts and cultural activities or events in deciding to take another vacation within **British Columbia**? *Circle the appropriate response.*

- A. NOT IMPORTANT AT ALL
- B. NOT IMPORTANT
- C. SOMEWHAT IMPORTANT
- D. IMPORTANT
- E. VERY IMPORTANT
- F. DON'T KNOW

26. Who was in your travel party when we interviewed you? Please indicate their relationship to you, age and gender. Please start with yourself. *Fill in the appropriate response.*

Who? (e.g wife, husband, son, daughter, parent, friend)	Age (in years)	Gender (M=Male, F=Female)
1 Myself		
2		
3		
4		
5		

27. Is there anything else you would like to tell us about your experience while in the **Okanagan Valley**?

Thank you for your help.

For your chance to win a digital camera,  
please return your completed questionnaire in the enclosed envelope to

**Tourism British Columbia Research Services**  
**Box 9830, Stn Prov Gov't, 300- 1803 Douglas St.**  
**Victoria, BC Canada V8W 9W5**

## **Appendix C-Seasonal Consideration for Winery Data**

## Seasonal Considerations for Winery Data

During the course of this research project, data was collected from various participating wineries, VICs and tourist sites in the Okanagan Valley. While sampling at the VICs as well as at the tourist sites took place between June and September, sampling at participating wineries continued until the middle of October 2002. In order to ensure consistency and comparability between the groups (tourist sites, wineries, VICs) in this overall report, only data that was collected from the wineries between June and September was utilized in deriving a comparative profile of winery visitors.

A summary of how the data differs before and after mid-September was completed and follows for data collected at the wineries only.

Compared to respondents who completed their surveys before September 14th, respondents who completed their surveys after this date were more significantly more likely to be female, older, using an airplane to get to the Okanagan Valley and staying at a resort/hotel/motel. They were also significantly less likely to be traveling in a car/truck/motorcycle and using a campground/RV park. Furthermore, these respondents traveled in significantly smaller travel parties and spent fewer days in the Okanagan Valley. With respect to their trip planning information usage, those who completed their surveys after September 13 were significantly more likely to obtain their information through brochures/books, Tourism BC and tour operators/tourism specific businesses. They were also significantly more flexible with respect to the amount of time they could spend in British Columbia (Table A2).

Those who completed their surveys after September 13th were significantly more likely to participate in a special dining experience, visit a First Nations attraction, a heritage or historic site, a museum, a wine festival, an art gallery, an artist studio or a farm/farmers market/orchard/food processor. They were also significantly less likely to participate in swim/other water based activities, a sporting event other than golf, attend an arts festival/event, visit a heritage festival/event or a family attraction. These respondents placed less importance on swim/other water based activities and more importance on a special dining experience, shopping, a wine festival or a farm/farmers market/orchard/food processor than did those who completed their surveys before this date.

Table A2. A summary of the comparisons between winery visitors interviewed on September 13th or earlier with those interviewed after September 13.

Variable	Significant Difference Pre v/s Post Sept 13
Origin	×
Gender	✓
Age	✓
Education	×
Income	×
Average Party Size - Total	✓
Primary Trip Purpose	×
Mode of Transportation	✓
Primary Accommodation	✓
Average Days Away from Home	×
Average Days in British Columbia	×
Average Days in the Okanagan Valley	✓
Average Daily Expenditures (\$ CDN)	×

✓ = significant difference between those who completed survey before Sept 13 and those who completed it after.

× = No significant difference between those who completed survey before Sept 13 and those who completed it after.

Table A2. A summary of the comparisons between winery visitors interviewed on September 13th or earlier with those interviewed after September 13. (continued)

Variable	Significant Difference Pre v/s Post Sept 13
Information Sources	
Internet	×
Travel Agents, Airlines, Auto Associations	×
Brochures and Books	✓
VICs	×
Tourism BC (1-800 # or other)	✓
Media Coverage	×
Friends, Relatives, Clubs and other Associations	×
Tour Operators/Tourism Specific Businesses	✓
Advertising (Print/TV)	×
Other	×
Don't Know/No Response	×
Trip Flexibility	
Flexibility with Activities	×
Time Flexibility in the Okanagan Valley	
Time Flexibility in British Columbia	✓
Activity Participation	
Participate in a Special Dining Experience	✓
Golf or Attend a Golf Event	×
Swim/Other Water-based Activities	✓
Visit a Natural History Attraction	×
Participate in Nature-Based Activities	×
Participate in or Attend a Sporting Event other than Golf	✓
Shop	×
Attend an Arts Festival or Event	✓
Visit a Heritage Festival or Event	✓
Visit a First Nations Attraction	✓
Visit a Heritage or Historic Site	✓
Visit a Museum	✓
Visit a Family Attraction	✓
Visit a Wine Festival	✓
Visit an Art Gallery	✓
Visit an Artist Studio	✓
Visit a Farm, Farmers Market, Orchard or Food Processor	✓

✓ = significant difference between those who completed survey before Sept 13 and those who completed it after.

× = No significant difference between those who completed survey before Sept 13 and those who completed it after.

Table A2. A summary of the comparisons between winery visitors interviewed on September 13th or earlier with those interviewed after September 13. (continued)

Variable	Significant Difference Pre v/s Post Sept 13
<b>Activity Importance</b>	
Participate in a Special Dining Experience	✓
Golf or Attend a Golf Event	✗
Swim/Other Water-based Activities	✓
Visit a Natural History Attraction	✗
Participate in Nature-Based Activities	✗
Participate in or Attend a Sporting Event other than Golf	✗
Shop	✓
Attend an Arts Festival or Event	✗
Visit a Heritage Festival or Event	✗
Visit a First Nations Attraction	✗
Visit a Heritage or Historic Site	✗
Visit a Museum	✗
Visit a Family Attraction	✗
Visit a Wine Festival	✓
Visit an Art Gallery	✗
Visit an Artist Studio	✗
Visit a Farm, Farmers Market, Orchard or Food Processor	✓

✓ = significant difference between those who completed survey before Sept 13 and those who completed it after.

✗ = No significant difference between those who completed survey before Sept 13 and those who completed it after.

## **Appendix D-Response Bias Testing**



## **Response Bias Testing**

### **Methods**

The study design produced two sets of data that are available for analysis - the interview and mailback questionnaires. The respondents and the responses could vary between the interview and mailback questionnaires. The respondents could differ because travelers could dropout of the study by not agreeing to complete the mailback questionnaires or by not completing the mailback questionnaire if they had agreed to complete it. Both instances could cause the mailback questionnaire results to be unrepresentative of travelers interviewed (non-response bias).

A series of tests were conducted to assess the mailback questionnaires' representativeness or, in other words, if the mailback questionnaire results portray the actual population of travelers interviewed.

Representativeness was assessed by:

1. Comparing demographics, trip and traveler characteristics between those that agreed and did not agree to complete the mailback questionnaire (Table A3).
2. Comparing demographics, trip and traveler characteristics between those that responded and those that did not respond to the mailback questionnaire (of those that agreed; Table A3).

Responses to similar questions in the interview and mailback questionnaires could vary due to real differences in traveler behaviour (for example, a traveler may have perceived that the VIC had a different impact on their trip when they were interviewed compared to the responses on the mailback questionnaire). Therefore a series of questions were asked in the same way on both the interview and mailback questionnaire. Differences between responses to the two questionnaires was assessed by comparing responses to key questions that were asked in both the interview and on the mailback questionnaire (Table A3).

### **Results**

#### **Differences in Respondents that Agreed or Did Not Agree to Mailback**

- There were some differences between those respondents that agreed to participate in the mailback questionnaire and those that did not agree to participate in the mailback questionnaire (residence category, gender, days away from home and days in British Columbia).
- There were significantly more Canadians from other provinces and fewer overseas visitors who agreed to participate in the mailback survey.
- Those who agreed to participate spent significantly fewer days away from home (15.1 days and 20.8 days) and in British Columbia (11.7 days and 15.4 days) than did those who did not agree to participate.

#### **Differences in Respondents that Returned/Did Not Return the Mailback Questionnaire**

- There were some differences between those respondents that returned the mailback questionnaire and those that did not (age and income).
- No non-responses bias issues with residence, gender, education, days away from home, days in British Columbia and parties with children were found.

- There was a statistically significant difference in the age category. Younger respondents were less likely to respond to the survey than older respondents.
- Respondents from higher income households were significantly more likely to respond to the survey than were respondents from lower income households.

### Differences in Interview/Mailback Responses

- The average number of days spent away from home by visitors who responded to the interview was significantly longer than those who responded to the mailback (14.6 days and 13.9 days respectively).
- The average number of days spent away in British Columbia by visitors who responded to the interview was significantly longer than those who responded to the mailback (11.4 days and 10.6 days respectively).

### Conclusions

- Overall, very few differences existed between those that agreed to participate in the mailback questionnaire and those that did not agree to participate in the mailback questionnaire.
- Mailback responses are generally representative of the population that was interviewed.
- Due to the above factors and to be conservative, the interview data was used to develop this report. Mailback questionnaire responses were used only when the question was not asked in the interview.
- These results are consistent with similar research conducted by Research Services in British Columbia.

Table A3. A summary of the comparisons between those that agreed to the mailback questionnaire and those that did not, those that did and did not respond to the mailback questionnaire and between the interview and mailback responses.

Variable	Y Indicates a Statistical Difference		
	Agreed to Mailback <sup>1</sup>	Mailback Responses (Non-Response Bias)	Interview/Mailback Responses
Residence Category	Y	N	
Gender	Y	N	
Age	N	Y	
Party Size	N	N	
Parties With Children	N	N	
Income	N	Y	
Education	N	N	
Days Away from Home <sup>2</sup>	Y	N	Y
Days in British Columbia <sup>2</sup>	Y	N	Y

#### Notes:

1. Represents only people that agreed to participate in the mailback questionnaire.

2. Paired sample t-tests were run on variables with ratio level data (mean days from home and mean days in British Columbia).

## **Appendix E-Cultural Travelers**

### Table Footnotes:

1. Indicates there are statistical differences at the  $p=0.05$  level between cultural and non-cultural travelers at tourist sites.
2. Indicates there are statistical differences at the  $p=0.05$  level between cultural and non-cultural travelers at wineries.
3. Indicates there are statistical differences at the  $p=0.05$  level between cultural and non-cultural travelers at VICs.

Table A4. Demographics of cultural and non-cultural travelers.

	Tourist Sites		Wineries		VICs		Overall Sample	
	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural
<b>Origin<sup>2,3</sup></b>								
British Columbia	38.8%	45.0%	51.5%	44.2%	29.1%	32.0%	42.8%	40.8%
US	7.4%	6.1%	10.8%	7.1%	10.4%	8.4%	9.3%	7.0%
Overseas	14.8%	11.6%	4.4%	9.0%	7.5%	16.0%	9.2%	12.4%
Other Canada	39.1%	37.3%	33.2%	39.7%	53.0%	43.6%	38.6%	39.8%
<b>Gender</b>								
Male	47.0%	50.8%	51.8%	54.8%	51.5%	54.6%	49.7%	52.8%
Female	53.0%	49.2%	48.2%	45.2%	48.5%	45.4%	50.3%	47.2%
<b>Age<sup>1</sup></b>								
Under 24 Years	10.6%	11.9%	5.2%	4.6%	11.3%	8.3%	8.4%	9.3%
25-34 Years	16.4%	22.5%	22.8%	23.5%	18.8%	24.7%	19.5%	23.4%
35-44 Years	29.0%	26.3%	25.4%	29.2%	28.6%	27.0%	27.4%	27.1%
45-54 Years	20.1%	22.8%	26.2%	24.6%	18.0%	22.4%	22.4%	23.0%
55-64 Years	14.5%	8.6%	15.0%	11.7%	15.8%	13.8%	14.9%	10.9%
65 Years	9.5%	8.0%	5.4%	6.4%	7.5%	3.9%	7.5%	6.4%
<b>Education</b>								
Less Than High School	2.9%	2.8%	1.3%	1.4%	2.2%	1.9%	2.1%	2.2%
High School	21.4%	20.5%	11.3%	15.1%	11.2%	14.6%	15.5%	17.5%
Some Technical, College or University	12.0%	11.4%	8.6%	7.6%	8.2%	8.7%	10.0%	9.8%
College or Technical Diploma	20.6%	22.7%	19.6%	15.8%	21.6%	20.2%	20.3%	20.5%
University Degree	28.9%	33.0%	38.0%	43.2%	47.0%	43.7%	35.5%	38.4%
Masters or a PHD Degree	13.6%	9.4%	21.2%	16.5%	9.7%	11.0%	16.3%	11.4%
<b>Income</b>								
Less than \$25,000	11.2%	8.8%	4.6%	6.1%	14.1%	9.1%	8.7%	8.4%
\$25,000 to \$49,999	15.9%	16.7%	7.9%	12.8%	17.2%	12.5%	12.5%	14.5%
\$50,000 to \$64,999	13.8%	15.8%	15.5%	13.3%	9.1%	19.8%	13.9%	16.6%
\$65,000 to \$99,999	23.9%	29.4%	26.4%	26.5%	25.3%	27.4%	25.2%	28.2%
\$100,000 or More	35.1%	29.4%	45.5%	41.3%	34.3%	31.3%	39.7%	32.3%
<b>Party Size</b>								
Average Party Size - Total	3.31	3.63	3.16	3.25	2.85	3.08	3.18	3.38
Average Party Size - Parties without children	2.61	2.70	2.50	2.54	2.41	2.22	2.53	2.50
Proportion with Children <sup>1</sup>	31.1%	41.6%	22.3%	28.0%	26.1%	33.2%	26.6%	36.1%
Average Party Size with Children	4.85	4.94	5.47	5.08	4.09	4.83	4.96	4.93

Table A5. Primary trip purpose, mode of transportation and primary accommodation of cultural and non-cultural travelers.

	Tourist Sites		Wineries		VICs		Overall Sample	
	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural
<b>Primary Trip Purpose<sup>1, 2, 3</sup></b>								
Leisure	69.7%	63.3%	77.8%	68.5%	86.6%	76.8%	75.7%	68.7%
Visiting Friends & Family	21.9%	24.9%	15.7%	23.4%	6.0%	13.3%	16.9%	20.9%
Work/Business	0.0%	8.2%	0.0%	6.5%	0.0%	6.3%	0.0%	7.2%
Other	8.4%	3.6%	6.4%	1.6%	7.5%	3.6%	7.4%	3.2%
<b>Mode of Transportation</b>								
Car/Truck/Motorcycle	79.4%	77.9%	91.0%	88.6%	79.1%	83.3%	84.4%	81.8%
RV	5.3%	6.1%	4.1%	4.2%	9.7%	7.4%	5.4%	6.1%
Bus	5.8%	5.8%	1.0%	0.3%	3.0%	3.0%	3.3%	3.8%
Airplane	7.4%	7.3%	3.6%	5.8%	4.5%	4.9%	5.3%	6.2%
Other	2.1%	2.9%	0.3%	1.0%	3.7%	1.5%	1.6%	2.1%
<b>Primary Accommodation</b>								
Resort/Hotel/Motel/B&B	44.4%	40.8%	53.7%	44.3%	43.3%	43.7%	48.3%	42.4%
Campground/RV	22.8%	23.6%	22.2%	24.2%	34.3%	38.1%	24.2%	28.3%
Friends or Relatives	24.3%	27.7%	18.3%	24.2%	14.2%	10.1%	20.2%	21.4%
Other	8.5%	7.8%	5.7%	7.3%	8.2%	8.1%	7.2%	7.8%

Table A6. The primary destination of cultural and non-cultural travelers.

	Tourist Sites		Wineries		VICs		Overall Sample	
	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural
Kelowna	28.0%	30.1%	38.2%	36.9%	26.1%	32.3%	32.1%	32.2%
Penticton	36.0%	34.3%	8.8%	7.8%	25.4%	24.1%	22.7%	25.6%
Osoyoos	1.9%	3.7%	7.0%	10.4%	1.5%	2.1%	4.0%	4.6%
Vernon	1.6%	1.1%	1.6%	3.6%	1.5%	1.7%	1.6%	1.8%
Summerland	2.4%	3.3%	4.7%	5.8%	5.2%	2.3%	3.8%	3.5%
Oliver	2.9%	2.6%	4.7%	3.6%	0.0%	0.0%	3.2%	2.0%
Peachland	0.5%	1.1%	1.3%	2.3%	0.7%	1.3%	0.9%	1.4%
Princeton	0.0%	0.1%	0.0%	0.3%	0.0%	0.2%	0.0%	0.2%
Keremeos	0.5%	0.3%	0.3%	0.3%	0.7%	0.4%	0.4%	0.3%
Enderby	0.3%	0.1%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%
Other Okanagan Valley	9.8%	7.6%	11.1%	7.4%	17.9%	8.7%	11.6%	7.9%
Other British Columbia	8.5%	9.2%	14.5%	13.3%	14.2%	18.2%	11.9%	12.8%
Other	7.7%	6.4%	8.0%	8.4%	6.7%	8.7%	7.7%	7.5%

Table A7. Average length of stay and daily expenditures of cultural and non-cultural travelers.

	Tourist Sites		Wineries		VICs		Overall Sample	
	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural
Average Days Away from Home	21.07	18.26	11.39	11.60	21.67	21.33	16.98	17.86
Average Days in British Columbia	17.35	15.37	9.11	8.86	13.83	19.76	13.23	15.40
Average Days in the Okanagan Valley	11.91	10.07	6.39	5.60	8.08	7.10	8.95	8.22
Average Daily Expenditures (\$ CDN) <sup>2</sup>	161.17	150.87	204.88	165.94	176.67	161.53	182.52	157.41

Table A8. Trip planning horizons for cultural and non-cultural travelers.

Advance Planning Timeframe	Tourist Sites		Wineries		VICs		Overall Sample	
	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural
During the Trip	1.8%	1.1%	1.5%	0.0%	0.7%	1.4%	1.6%	0.9%
Day of Departure	2.6%	2.3%	1.5%	1.4%	3.7%	1.8%	2.3%	2.0%
1-6 Days	10.6%	10.4%	14.4%	6.4%	9.7%	11.2%	12.1%	9.8%
1-2 Weeks	14.0%	14.6%	13.6%	19.1%	12.7%	15.1%	13.6%	15.7%
3-8 Weeks	26.1%	30.4%	29.8%	31.6%	32.1%	28.3%	28.6%	30.0%
9-12 Weeks	12.9%	10.8%	11.3%	15.6%	7.5%	10.5%	11.4%	11.7%
13 Weeks+	31.9%	30.4%	27.8%	25.9%	33.6%	31.7%	30.4%	29.9%

Table A9. Information source usage by cultural and non-cultural travelers.

Information Sources	Tourist Sites		Wineries		VICs		Overall Sample	
	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural
Internet	37.7%	34.4%	46.8%	41.1%	48.5%	43.2%	43.2%	38.6%
Travel Agents, Airlines, Auto Associations <sup>1</sup>	10.8%	6.7%	8.3%	6.0%	11.9%	8.4%	9.9%	7.1%
Brochures and Books	21.4%	20.9%	22.5%	20.2%	24.6%	29.3%	22.3%	23.4%
VICs <sup>2</sup>	9.0%	7.3%	13.2%	5.3%	17.9%	21.1%	12.1%	11.3%
Tourism BC (1-800 # or other) <sup>2,3</sup>	8.4%	7.0%	12.7%	6.7%	14.9%	8.2%	11.2%	7.3%
Media Coverage	2.1%	1.2%	1.3%	1.8%	0.0%	1.6%	1.4%	1.4%
Friends, Relatives, Clubs and other Associations <sup>2</sup>	33.5%	38.9%	32.0%	43.5%	34.3%	30.0%	33.0%	37.0%
Tour Operators/Tourism Specific Businesses	2.6%	1.4%	0.3%	1.4%	2.2%	1.4%	1.6%	1.4%
Advertising (Print/TV) <sup>1,2</sup>	4.0%	1.7%	4.7%	1.8%	3.0%	1.8%	4.1%	1.7%
Other <sup>1</sup>	35.6%	29.4%	22.0%	17.7%	26.1%	23.0%	28.4%	25.0%
Don't Know/No Response <sup>2</sup>	2.9%	3.6%	0.8%	2.8%	0.0%	1.4%	1.6%	2.7%

Table A10. Trip flexibility (Activities) of cultural and non-cultural tourists.

Level of Flexibility	Tourist Sites		Wineries		VICs		Overall Sample	
	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural
Inflexible (all activities are planned)	2.9%	3.3%	2.8%	3.5%	2.3%	2.5%	2.8%	3.1%
Moderately Flexible (about half of activities are planned)	9.5%	8.7%	9.3%	9.0%	7.5%	7.9%	9.1%	8.5%
Very Flexible (less than half of activities are planned)	87.6%	88.0%	87.9%	87.5%	90.2%	89.6%	88.1%	88.4%

Table A11. Trip flexibility (time in the Okanagan Valley) of cultural and non-cultural tourists.

Level of Flexibility	Tourist Sites		Wineries		VICs		Overall Sample	
	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural
Inflexible(You have to depart at a set time)	22.0%	23.6%	26.6%	32.2%	26.1%	29.4%	24.6%	27.2%
Moderately Flexible (You can change the time of the day for departure)	27.9%	26.6%	33.1%	27.3%	24.6%	25.3%	29.6%	26.3%
Very Flexible(You can change the day of departure)	50.1%	49.8%	40.3%	40.5%	49.3%	45.2%	45.8%	46.4%

Table A12. Trip flexibility (time in British Columbia) of cultural and non-cultural tourists.

Level of Flexibility <sup>2</sup>	Tourist Sites		Wineries		VICs		Overall Sample	
	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural
Inflexible(You have to depart at a set time)	27.3%	33.1%	31.7%	45.1%	31.7%	36.6%	29.9%	36.7%
Moderately Flexible (You can change the time of the day for departure)	25.0%	22.9%	34.7%	23.9%	19.8%	24.2%	28.4%	23.5%
Very Flexible(You can change the day of departure)	47.7%	44.0%	33.6%	31.1%	48.4%	39.2%	41.7%	39.8%



Table A13. Activity participation of cultural and non-cultural tourists.

Activity	Tourist Sites		Wineries		VICs		Overall Sample	
	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural
Participate in a Special Dining Experience (fine dining, local cuisine) <sup>1,2,3</sup>	58.4%	42.7%	59.0%	39.8%	55.1%	29.2%	58.2%	40.0%
Golf or Attend a Golf Event <sup>2</sup>	15.3%	19.8%	16.0%	26.0%	18.4%	20.1%	16.0%	21.5%
Swim/Other Water-based Activities (water-skiing, windsurfing, boating) <sup>2</sup>	77.1%	80.5%	66.3%	73.5%	70.6%	75.5%	71.5%	78.0%
Visit a Natural History Attraction (scenic landscape, garden, natural resource interpretation site) <sup>1,2,3</sup>	58.9%	33.9%	45.7%	32.4%	71.2%	40.4%	54.9%	34.4%
Participate in Nature-Based Activities (wildlife viewing, hunting or fishing, walking, hiking or cycling or visiting a regional or provincial park) <sup>1,2</sup>	76.1%	61.3%	60.4%	50.9%	75.4%	67.7%	69.2%	59.5%
Participate in or Attend a Sporting Event other than Golf <sup>1,3</sup>	24.1%	18.3%	11.9%	12.0%	22.8%	13.6%	18.6%	16.0%
Shop <sup>1</sup>	73.7%	64.7%	62.9%	68.3%	66.9%	59.7%	68.0%	64.9%
Attend an Arts Festival or Event (theatre, dance performance, musical concert, film festival or a poetry or literary reading) <sup>1,2</sup>	24.9%	11.2%	17.6%	10.9%	25.0%	15.7%	21.7%	11.8%
Visit a Heritage Festival or Event <sup>1,2</sup>	13.6%	5.7%	8.5%	4.6%	16.0%	8.7%	11.7%	5.8%
Visit a First Nations Attraction <sup>1</sup>	14.6%	6.0%	5.7%	4.9%	13.4%	7.3%	10.5%	5.9%
Visit a Heritage or Historic Site <sup>1,2,3</sup>	41.1%	19.3%	29.9%	17.7%	46.8%	31.6%	37.0%	20.6%
Visit a Museum <sup>1,2,3</sup>	21.7%	12.7%	15.2%	10.0%	33.6%	19.0%	20.5%	12.9%
Visit a Family Attraction (Waterslides, Miniature Golf, etc.)	39.4%	44.0%	27.1%	30.3%	31.7%	41.4%	33.0%	40.0%
Visit a Wine Festival <sup>2</sup>	4.0%	2.6%	3.4%	0.4%	3.9%	2.7%	3.7%	2.0%
Visit an Art Gallery <sup>1,2,3</sup>	19.0%	9.8%	22.1%	10.9%	23.6%	8.7%	21.0%	9.9%
Visit an Artist Studio <sup>1,2,3</sup>	17.6%	7.0%	20.3%	8.9%	25.4%	10.7%	19.9%	8.0%
Visit a Farm, Farmers Market, Orchard or Food Processor <sup>1,3</sup>	85.8%	66.9%	78.8%	74.2%	88.1%	60.9%	83.1%	67.9%

Table A14. Primary activities of cultural and non-cultural travelers.

Primary Activity	Tourist Sites		Wineries		VICs		Overall Sample	
	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural
Beach/Sunbathing/Swimming	35.1%	39.7%	18.7%	25.8%	20.9%	25.9%	25.9%	32.4%
Wine/Wineries	3.4%	1.4%	31.6%	11.3%	12.7%	11.3%	16.9%	6.6%
Relaxing	14.8%	21.3%	16.8%	23.7%	9.7%	14.1%	14.9%	19.5%
Sightseeing	11.6%	7.5%	5.7%	9.2%	16.4%	13.9%	9.8%	9.9%
Hiking/Walking	7.4%	6.7%	3.6%	4.9%	6.7%	7.4%	5.7%	6.6%
Biking/Cycling	5.0%	2.0%	1.0%	1.4%	6.0%	4.2%	3.4%	2.6%
Touring	2.9%	3.2%	3.6%	1.1%	3.0%	1.4%	3.2%	2.2%
Golfing	2.6%	2.6%	2.6%	5.3%	4.5%	4.8%	2.9%	3.9%
Eating/Drinking	2.1%	1.8%	3.4%	1.4%	2.2%	0.9%	2.7%	1.5%
Outdoor activities/Recreation	4.0%	1.8%	1.0%	2.5%	1.5%	2.5%	2.3%	2.2%
Festivals/Events	1.8%	1.4%	1.8%	0.0%	2.2%	1.6%	1.9%	1.2%
Fruit Picking/Fruit	0.5%	0.3%	1.6%	0.0%	3.7%	0.7%	1.4%	0.4%
Visiting	0.5%	1.8%	2.3%	2.5%	0.7%	1.4%	1.3%	1.8%
Boating	0.5%	1.4%	1.6%	2.5%	0.7%	0.7%	1.0%	1.4%
Enjoying Nature/Scenery	1.3%	0.2%	0.3%	0.4%	2.2%	0.5%	1.0%	0.3%
Camping	1.1%	0.8%	0.3%	0.4%	2.2%	3.2%	0.9%	1.5%
Soccer	0.0%	0.3%	0.3%	2.1%	0.0%	1.2%	0.1%	0.9%

Table A15. The most frequently cited positive images of the Okanagan Valley as perceived by cultural and non-cultural travelers.

Positive Image	Tourist Sites		Wineries		VICs		Overall Sample	
	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural
Beautiful landscape/scenery	69.4%	69.1%	62.0%	71.5%	55.1%	73.0%	64.1%	70.8%
Good climate	58.0%	73.2%	59.7%	72.6%	57.1%	63.8%	58.7%	70.4%
Wineries/vineyards	9.6%	10.2%	44.2%	35.4%	28.6%	21.3%	28.6%	18.8%
Lots to do	19.7%	19.9%	23.3%	19.8%	32.7%	22.0%	23.0%	20.5%
Friendly/helpful people	18.5%	18.3%	17.3%	10.9%	30.6%	21.3%	19.4%	17.5%
Fruits/orchards	21.0%	15.9%	17.9%	12.5%	12.2%	12.1%	18.4%	14.0%
Beach/water activities	21.0%	23.2%	6.2%	15.8%	18.4%	15.6%	13.5%	19.4%
Overall atmosphere	12.7%	13.0%	13.8%	16.0%	14.3%	11.3%	13.4%	13.2%
Outdoor activities	8.3%	2.8%	5.8%	3.9%	16.3%	9.2%	8.1%	4.9%
Cleanliness	10.8%	6.9%	5.4%	3.0%	2.0%	3.5%	7.1%	5.1%
Restaurants/food	5.7%	4.5%	6.3%	2.2%	0.0%	2.1%	5.3%	3.3%
Accessibility	6.4%	3.7%	3.5%	3.0%	6.1%	7.1%	5.0%	4.5%
Golf/mini-golf	3.8%	3.7%	4.7%	6.2%	0.0%	5.7%	3.8%	4.8%
Visiting Friends and Relatives	2.5%	5.7%	1.0%	3.3%	4.1%	0.0%	2.0%	3.6%

Table A16. The most frequently cited negative images of the Okanagan Valley as perceived by cultural and non-cultural travelers.

Negative Image	Tourist Sites		Wineries		VICs		Overall Sample	
	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural
Traffic	34.7%	35.4%	41.8%	36.7%	22.2%	30.4%	37.1%	34.3%
Crowding/busy	20.4%	22.8%	17.1%	11.7%	22.2%	26.1%	18.9%	21.4%
Poor access/travel roads/signage	17.3%	10.8%	13.9%	10.2%	7.4%	12.0%	14.5%	11.0%
Expensive - in general	12.2%	10.8%	16.1%	11.8%	7.4%	17.4%	13.8%	12.9%
Poor weather/temperature/climate	12.2%	8.2%	9.8%	17.1%	29.6%	9.8%	12.7%	10.6%
Insufficient attractions/activities	12.2%	12.0%	8.9%	6.5%	14.8%	4.3%	10.7%	8.6%
Busy/crowded campgrounds	10.2%	7.6%	8.3%	10.4%	18.5%	8.7%	10.1%	8.5%
Expensive accommodation	7.1%	9.5%	9.9%	4.7%	7.4%	5.4%	8.6%	7.3%
Too commercial	10.2%	4.4%	7.2%	17.7%	7.4%	2.2%	8.4%	6.6%
Social concerns	13.3%	11.4%	5.7%	8.2%	3.7%	7.6%	8.3%	9.6%
Disappointing experience	8.2%	6.3%	8.3%	4.8%	3.7%	9.8%	7.8%	7.0%
Distance from home	7.1%	9.5%	6.9%	11.7%	3.7%	6.5%	6.7%	9.1%
Noise/cleanliness	6.1%	4.4%	6.1%	5.3%	7.4%	4.3%	6.2%	4.6%
Environmental degradation	7.1%	8.9%	4.5%	3.0%	0.0%	6.5%	5.0%	6.9%
Expensive gas	3.1%	0.6%	3.5%	1.0%	11.1%	2.2%	4.1%	1.2%
Sales tax	3.1%	5.1%	2.6%	8.8%	7.4%	4.3%	3.2%	5.7%

Table A17. The most frequently cited unique characteristics of the Okanagan Valley as a vacation as perceived by cultural and non-cultural travelers.

Unique Characteristic	Tourist Sites		Wineries		VICs		Overall Sample	
	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural
Scenery/beauty/landscape/lake/location	57.5%	53.9%	56.5%	55.9%	54.5%	57.6%	56.7%	55.4%
Wineries/vineyards/wine tasting/wine tours	31.5%	29.4%	61.2%	60.2%	47.7%	45.3%	48.1%	40.8%
Weather/temperature/climate	53.4%	44.7%	45.3%	40.1%	40.9%	46.0%	47.9%	44.1%
Fruit/produce/vegetables/orchards	32.2%	34.6%	28.5%	17.7%	15.9%	24.5%	28.4%	27.9%
Variety or services/activities/attractions/recreation	21.2%	19.7%	15.2%	14.4%	20.5%	18.7%	18.1%	18.3%
Beach/swimming/water activities	18.5%	17.1%	9.3%	10.7%	18.2%	14.4%	13.9%	14.9%
Friendly/helpful people/service	9.6%	7.5%	8.3%	6.5%	6.8%	7.9%	8.6%	7.4%
Outdoor activities other than beach/golf	6.8%	5.7%	1.6%	3.0%	11.4%	5.0%	4.8%	4.9%
Golf-mini-golf	2.1%	4.4%	6.2%	3.5%	6.8%	2.9%	4.7%	3.7%
Distance - close to home	4.1%	4.8%	4.8%	4.2%	4.5%	2.2%	4.5%	3.9%
Atmosphere	6.2%	6.6%	2.6%	4.2%	4.5%	4.3%	4.2%	5.4%
Affordable	1.4%	2.2%	2.9%	0.0%	6.8%	1.4%	2.8%	1.5%
Other	4.1%	7.0%	2.3%	5.8%	0.0%	2.2%	2.7%	5.3%
Visiting Friends and Relatives	1.4%	2.6%	1.9%	4.3%	0.0%	0.7%	1.5%	2.4%

Table A18. Post-trip satisfaction with trip to Okanagan Valley and British Columbia, likelihood of taking another trip to the Okanagan Valley and British Columbia and importance of Arts and Cultural Activities in returning to the Okanagan Valley and British Columbia by cultural and non-cultural travelers.

Post-Trip Evaluation	Tourist Sites		Wineries		VICs		Overall Sample	
	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural	Cultural	Non-Cultural
Satisfaction <sup>1</sup> With Trip to Okanagan Valley	89.6%	87.5%	90.5%	89.9%	90.0%	88.0%	90.1%	88.1%
Satisfaction <sup>1</sup> With Trip to British Columbia	94.4%	96.1%	98.0%	94.5%	91.8%	94.6%	95.8%	95.3%
Likelihood <sup>2</sup> of Taking Another Trip to Okanagan Valley	91.9%	92.5%	92.5%	90.8%	95.9%	89.6%	92.7%	91.3%
Likelihood <sup>2</sup> of Taking Another Trip Within British Columbia	94.9%	95.4%	94.4%	98.2%	100.0%	93.3%	95.5%	95.2%
Importance <sup>3</sup> of Arts and Cultural Activities in Returning to the Okanagan Valley	23.6%	11.8%	23.6%	18.1%	38.7%	18.9%	25.4%	15.2%
Importance <sup>3</sup> of Arts and Cultural Activities in Returning to British Columbia	20.6%	14.2%	27.6%	20.7%	35.1%	21.0%	25.9%	17.7%

1. Somewhat or very satisfied. 2. Likely or very likely. 3. Important or very important.

## **Appendix F - Traveler Activities**

Table A19. Activity participation in the Okanagan Valley.

Activity Participation	Percentage of Respondents By Survey Group			
	Tourist Sites	Wineries	VICs	Overall Sample
Swim/Other Water-based Activities (water-skiing, windsurfing, boating) *	79.2%	69.3%	73.3%	75.0%
Visit a Farm, Farmers Market, Orchard or Food Processor	73.8%	76.8%	73.3%	74.7%
Shop	68.0%	65.2%	63.0%	66.3%
Participate in Nature-Based Activities (wildlife viewing, hunting or fishing, walking, hiking or cycling or visiting a regional or provincial park) *	66.7%	56.3%	71.2%	63.8%
Participate in a Special Dining Experience (fine dining, local cuisine) *	48.4%	50.9%	40.9%	48.2%
Visit a Natural History Attraction (scenic landscape, garden, natural resource interpretation site) *	43.0%	40.1%	54.3%	43.6%
Visit a Family Attraction (Waterslides, Miniature Golf, etc.) *	42.3%	28.5%	37.1%	36.9%
Visit a Heritage or Historic Site*	27.2%	24.7%	38.4%	27.9%
Golf or Attend a Golf Event	18.2%	20.2%	19.4%	19.0%
Participate in or Attend a Sporting Event other than Golf*	20.4%	11.9%	17.8%	17.2%
Visit a Museum*	16.0%	12.9%	25.5%	16.3%
Attend an Arts Festival or Event (theatre, dance performance, musical concert, film festival or a poetry or literary reading)	16.2%	14.8%	19.9%	16.2%
Visit an Art Gallery	13.1%	17.3%	15.5%	14.9%
Visit an Artist Studio*	10.9%	15.3%	17.4%	13.3%
Visit a Heritage Festival or Event*	8.6%	6.9%	12.0%	8.5%
Visit a First Nations Attraction*	9.1%	5.4%	10.1%	8.0%
Visit a Wine Festival	3.1%	2.1%	3.3%	2.8%

\*. Indicates there are statistical differences at the p=0.05 level.



Table A20. Importance of activities in travel planning decision.

Activity Importance (somewhat or very important)	Percentage of Respondents By Survey Group			
	Tourist Sites	Wineries	VICs	Overall Sample
Swim/Other Water-based Activities (water-skiing, windsurfing, boating) *	71.1%	60.6%	65.5%	67.0%
Participate in Nature-Based Activities (wildlife viewing, hunting or fishing, walking, hiking or cycling or visiting a regional or provincial park)	59.0%	59.0%	64.0%	59.8%
Participate in or Attend a Sporting Event other than Golf	59.7%	52.5%	66.0%	58.9%
Visit a Wine Festival	50.0%	71.4%	55.6%	56.4%
Visit a Farm, Farmers Market, Orchard or Food Processor	52.0%	49.1%	58.1%	51.9%
Golf or Attend a Golf Event	48.7%	55.9%	51.9%	51.7%
Visit a Natural History Attraction (scenic landscape, garden, natural resource interpretation site)	48.3%	48.7%	54.7%	49.5%
Visit a Family Attraction (Waterslides, Miniature Golf, etc.)	49.8%	45.0%	48.5%	48.4%
Participate in a Special Dining Experience (fine dining, local cuisine)	39.0%	46.8%	46.1%	42.6%
Visit a First Nations Attraction	31.2%	47.2%	53.6%	38.9%
Attend an Arts Festival or Event (theatre, dance performance, musical concert, film festival or a poetry or literary reading)	40.7%	31.3%	38.2%	37.4%
Visit a Heritage or Historic Site	37.7%	34.5%	38.7%	36.9%
Visit a Heritage Festival or Event	40.9%	31.1%	27.3%	35.5%
Visit an Art Gallery	39.3%	27.6%	44.2%	35.4%
Visit an Artist Studio	37.5%	29.4%	37.5%	34.4%
Shop	30.7%	25.1%	28.8%	28.6%
Visit a Museum	26.2%	22.1%	22.9%	24.4%

\*. Indicates there are statistical differences at the p=0.05 level.