

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%).