



**TOURISM BRITISH COLUMBIA**  
C A N A D A

®

**RESEARCH AND PLANNING**

**OKANAGAN VALLEY WINE CONSUMER  
RESEARCH STUDY 2008  
RESULTS**

Summer 2009

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## Acknowledgements

The 2008 Okanagan Valley Wine Consumer Research Study was a comprehensive survey of travellers to seven wineries located in two sub-regions in the Okanagan Valley between August and October 2008.

The Okanagan Valley Wine Consumer Research Study was a partnership between Tourism British Columbia, the Thompson Okanagan Tourism Association and the seven participating wineries from the Okanagan Valley:

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| <ul style="list-style-type: none"><li>• Mission Hill Family Estates</li><li>• Cedar Creek Estate Winery</li><li>• Elephant Island</li><li>• Soaring Eagle Estate Winery</li></ul> | <ul style="list-style-type: none"><li>• Tinhorn Creek Vineyards</li><li>• Burrowing Owl Estate Winery</li><li>• Nk"mip Cellars</li></ul> |
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## Executive Summary

In 2008, Tourism British Columbia, Thompson Okanagan Tourism Association (TOTA) and seven participating wineries in the Okanagan Valley collaborated to conduct research with visitors to the Okanagan wineries. The primary objectives of this study were to support marketing initiatives and product development of the Okanagan Valley's wine tourism product, specifically:

1. To examine travel motivations and trip planning behaviours of wine travellers;
2. To profile travellers who visit the Okanagan Valley's wineries in terms of traveller and trip characteristics in order to support product development and marketing initiatives.

A multi-location, two-stage survey design was used to investigate the study objectives. Travellers were interviewed at one of seven winery locations in the North and South Okanagan Valley. On-site interviews collected information from travellers during their trip and a mailback questionnaire collected information from travellers after their trip. The purpose of the mailback questionnaire was to gather information about trip motivation, planning, experiences and activities, and to understand travellers' perceptions of the East Kootenay region and British Columbia upon trip completion.

- Between August 1<sup>st</sup> and October 14<sup>th</sup>, 2008, a total of 3,191 people were approached at one of seven participating Okanagan Valley wineries. Of those, 2,471 agreed to complete the interview. However, 347 of these individuals were local residents, 84 had participated in the survey on a previous occasion, and 53 started the survey, but did not complete. All of these instances were removed from the final tally resulting in 1,977 useable surveys.
- Nearly seventy percent of respondents agreed to complete the follow-up survey and 46% of these did so, resulting in 536 useable surveys for analysis.
- Fifty percent of independent, leisure travellers were from BC, whereas a quarter were from Alberta (26%) and fewer from elsewhere in Canada (13%), the US (5%) or from other international countries (5%).
- The majority of wine travellers in the Okanagan Valley were between the ages of 35 to 64 years with the most frequently stated age category being 45 to 54 years of age (27%).
- Three quarters (74%) of wine travellers had at least a college or technical diploma, with the most frequently stated education category being a university degree (38%).
- Half (52%) of the respondents had annual household incomes of at least \$100,000 and another quarter (25%) had incomes between \$65,000 and \$99,999.
- Slightly over three quarters (79%) of respondents indicated that this was not their first time wine-touring.

- The majority of travellers interviewed at Okanagan Valley wineries were travelling for leisure purposes (72%), a quarter were travelling to visit friends and family (27%), while fewer for other purposes (1%).
- High interest wine travellers were more likely to be travelling for leisure purposes (81%) as opposed to visiting family and friends (19.1%). They were also more likely to stay at Resort/Hotel/Motel/B&Bs (58.1%) as compared to low interest wine travellers.
- A majority (94%) of travellers used a car/truck/motorcycle as their primary mode of transportation, whereas fewer travelled in a recreational vehicle (4%) or a bus (<0.5%).
- Half (50%) of wine travellers were staying in traditional fixed roof accommodations (Hotel/Motel/Resort/B&Bs) and a quarter with family and friends (25%). Less than a fifth (16%) were staying at a campground/RV park. Fewer were staying at non-traditional types of accommodation such as second homes/rental homes/timeshares (8%).
- The primary destination of the majority of wine travellers (76%) was the Okanagan Valley. One in ten wine travellers (11%) was touring with no particular destination whereas the remainder had primary destinations elsewhere in Canada (2.9%), or other international destinations (0.9%).
- Overall, the average travel party size was 2.8 people and 14% of wine travellers were travelling with children. Those parties with children had an average of 4.6 people travelling in their group. Parties travelling without children had an average travel party size of 2.6 people.
- The average time away from home on the trip was 9.7 days (median = 7.0 days) and travellers intended to spend 8.0 of those days (median = 6.0) in British Columbia and an average of 5.7 days (median = 4.0 days) in the Okanagan Valley.
- Advice from family and friends (60%), past experience visiting wineries in the Okanagan Valley (55%) and tourism/travel/visitor guides or books (49%) were among the top information sources used before travel. Also important information sources used prior to leaving home included maps (48%), prior experience at winery (44%) and a local or regional tourism website (44%).
- Maps (53%), tourism/travel/visitor guides or books (53%), and advice received from friends and relatives (44%) were the top information sources used during travel. Also important, but less frequently used, information sources during trip included Visitor Centres (41%), past experience visiting wineries in the Okanagan Valley (35%), winery business brochures (34%) and prior experience visiting particular winery (34%).
- The majority (55%) of travellers indicated that wine touring played at least some importance in planning their trip (known as high interest wine travellers). Over a quarter (27%) indicated it was the primary reason with an additional 27% rating it an important reason. While the specific winery intercepted at played at less important role in trip planning, over a third (39%) of travellers indicated that the specific winery played at least some importance in trip planning.

- The majority of travellers (77%) spent three weeks or more planning their trip. Over a third of travellers (37%) indicated that the primary motivation of their trip was 'to spend quality time with family/friends'. High interest wine travellers were less likely to be motivated by spending quality time with their friends/family (29%) and more likely because they 'have a passion for wine' (14%) as compared to low interest wine travellers (3%).
- Cost/budget considerations aside, almost half (48%) indicated that the primary consideration in planning their trip was the destination (*Selected destination first and then thought about trip activities*) versus less than a quarter of travellers whose primary consideration was to visit wineries (*Selected wine touring first and then thought about destination*, 23%). High interest travellers were considerably more likely to consider visiting wineries as the primary trip consideration compared to low interest travellers (34% & 5%, respectively).
- Travellers who did not indicate that wine touring was the primary reason for their trip were asked to identify the leisure activity that was the primary reason. Over a quarter indicated that there was no specific leisure activity while a fifth indicated a nature-based activity (boating, hiking, camping etc) and nearly 15% mentioned participating in lake activities.
- When asked about reasons for visiting specific wineries, over a third (37%) of respondents indicated that recommendations (from friends, local businesses and/or other sources) were a key reason for visiting. A fifth of respondents (22%) indicated being attracted to visit by either passing by the winery or road signage, while a tenth were familiar with the name/product (11%)
- Travellers were also asked about other leisure activities they intended to participate in while their trip (intercept survey) and actual activities they did participate in (follow up survey). During the trip, respondents indicated that they were likely to participate in fine dining (66%), visit a farmer's market (64%), visit a museum/historical site (34%) and/or go hiking (33%). After their trip, respondents indicated that they had actually visited a farmer's market (68%), drove a wine trail (64%), participated in fine dining (59.2%), and experience local or regional cuisine (53%). Respondents also indicated shopping for local arts/crafts (54%), participating in swimming/beach activities (43%), dining (70%), swimming (53%) and shopping for local arts and crafts (53%) as popular trip activities.
- On average, wine travellers intended to visit a total of 9 wineries during their trip averaging 3.5 wineries on the actual interview day. High interest wine travellers were more likely to visit more wineries in total (11.7) and also more wineries in the Okanagan Valley (9.4) and per day (4.3).
- Over two thirds (69%) of wine travellers were first time visitors to the winery where they were intercepted but over half (55%) had tasted the specific winery's product prior to visiting. While at the winery, the majority of wine travellers indicated they wine tasted (85%) and purchased wine (71%). Less took a self/guided tour (23%) or purchased other merchandise (24%).
- Over three quarters (79%) were very satisfied with their overall wine touring experience in the Okanagan Valley. Less than a tenth (8%) of respondents indicated that they were somewhat or very dissatisfied. Reasons provided by these respondents were related to a service or amenities that was lacking, poor accommodation, expensive wine or lack of information. Those highly

satisfied gave reasons of high level of service, high quality of wine/food and relaxed atmosphere as some of the contributors to their satisfaction.

- In terms of likelihood of taking a return trip to wineries in other regions of British Columbia, less than half (38%) indicated that they were either 'very likely' (20%) or 'likely' (18%) to take such a trip in the next two years.
- Respondents were also asked about their likelihood of taking another leisure trip to visit wineries in the Okanagan valley and similarly, over a third indicated that they would be either 'very likely' (29%) or 'likely' (8%) in the next two year. High interest wine travellers, however, were very likely to take another trip to the Okanagan to visit wineries (79%, Very likely).
- Travellers were asked to identify what unique characteristics of the Okanagan Valley that make it different from other wine destinations. Half (54%) indicated that the Okanagan Valley's beautiful scenery/unique geography make it different from other destinations, while a third (35%) cited its sunny, dry weather.
- Travellers at the Okanagan Valley wineries spent an average of \$304.99 per party per day. High interest wine travellers reported considerably higher per diem expenditures than low interest wine travellers (\$356.71 & \$243.62, respectively). There were also notable differences in expenditures when broken down by origin of the travellers, primary accommodation type, travel party size and age.