



## 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:

- |   |  |
|---|--|
| <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> |
|---|--|

Tourism British Columbia would like to gratefully acknowledge the wineries that assisted with the project by providing access for on-site visitor interviews as well as providing other assistance throughout the project.

This report was partially written by the Kim Nuernberger of Agency Research Consultants on contract with Research and Planning, Tourism British Columbia.

## 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.

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## Introduction

In 2000, the Okanagan Cultural Corridor Project (OCCP) was initiated in the Thompson Okanagan tourism region. The project was designed to increase cultural tourism in the Okanagan Valley by packaging and marketing the Valley's cultural attractions. In the summer of 2002, onsite interviews with travellers to the Okanagan Corridor were conducted in an effort to support a marketing development plan for the Okanagan Cultural Corridor project. Interviews were conducted at various sites around the Okanagan Valley including tourists sites (beaches, downtowns, picnic areas etc), various Visitor Centres in the corridor as well as a selection of wineries. The purpose of the Okanagan Cultural Corridor Research project was:

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.

As a result of the 2000 research project, a report titled *A Profile of Visitors to British Columbia's Okanagan Valley: A Focus on Cultural Travellers*<sup>1</sup> was produced, providing not only a profile of cultural travellers to the region during the summer of 2000, but also a profile of visitors intercepted at the local area's participating wineries.

In recent years, Tourism British Columbia and industry partners have realized the growth potential of a number of developing tourism sectors, including British Columbia's wine/culinary tourism product. In an effort to facilitate ongoing strategically positioned development of wine tourism products and markets, it was determined that updated consumer research was needed. In order to capitalize on the learnings from the wine traveller profile developed from the 2002 partnership study, a similar but expanded wine consumer research plan was created for implementation in the summer season of 2008.

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.

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<sup>1</sup> Full report is from Tourism BC available at:  
[http://www.tourismbc.com/PDF/OKANAGAN%20CULTURAL%20CORRIDOR%20PROJECT-JAN\\_13\\_2004.pdf](http://www.tourismbc.com/PDF/OKANAGAN%20CULTURAL%20CORRIDOR%20PROJECT-JAN_13_2004.pdf)



## Methods

A multi-location, two-stage survey design was used to achieve the study objectives. Travellers were initially interviewed at one of seven wineries in the Okanagan Valley. On-site interviews collected information from travellers during their trip. Those interviewed were randomly asked to complete either an online email survey or a follow-up, mailback questionnaire that collected information from travellers after their trip. The purpose of the follow-up survey was to gather additional information about trip characteristics, planning, experiences and activities, to compare mid-trip and post trip expenditure information, and to understand travellers' perceptions of the Okanagan region, winery visitation, and British Columbia upon trip completion.

### Data Collection - Interview

Two interviewers collected data between August 1<sup>st</sup> and October 14<sup>th</sup>, 2008. On-site interviews were conducted at one of seven Okanagan wineries throughout the duration of the study period. For the most part, the interviewers' schedule consisted of a systematic sample of four continuous days of interviewing followed by two days off, alternating on a daily basis between the seven participating wineries in the Okanagan Valley (Appendix A).

Potential respondents were randomly selected at each location, as they exited the winery and were asked if they were willing to participate in an eight-minute interview. All respondents were given a *Super, Natural British Columbia*® refrigerator magnet for their time. Respondents were then asked if they had previously completed a Tourism BC administered survey on their current trip. If so, they were eliminated from the interview in an effort not to duplicate responses. Respondents then progressed through a series of further screening questions in which respondents who were residents of the Okanagan Valley region<sup>2</sup> were screened out of the survey in an effort to focus on travellers to the area. Interviews with business travellers, tour group participants and day trippers were ended after a few profiling questions.

At all sites, only independent, non-resident, overnight leisure travellers were recruited for the follow-up survey. The interviewers recorded responses on handheld computers (Palm Pilots) using Techneos Data Entryware software.

During the interview, questions were asked about (see intercept questionnaires in Appendix B):

- traveller demographics,
- primary trip purpose,
- primary destination,
- other communities visited,
- primary mode of transportation,
- trip duration,
- length of stay in the Okanagan Valley and in British Columbia,
- primary accommodation,
- daily expenditures,

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<sup>2</sup> Defined as the area south of Enderby and north of Osoyoos, including all communities and all communities in the area of Lake Okanagan.

- primary trip motivations,
- travel experience at Okanagan Valley wineries,
- travel intentions regarding the Okanagan Valley,
- reasons for decision to visit Okanagan Valley wineries,
- detailed travel expenditures.

With the exception of local residents, tour group participants, and business travellers, all respondents were asked to participate in the follow-up questionnaire and either email or mailing addresses were collected from those who agreed to participate. A copy of *British Columbia Magazine* (sent only to those participating in the mailback survey) and a chance to win a digital camera were used as incentives to achieve a high participation rate in the mailback questionnaire.

Between August 1 and October 14, 2008, a total of 3,191 people were approached at one of the seven participating Okanagan wineries. Of those, 2,471 agreed to complete the interview. However, 347 were excluded from participation as they were residents of the local area, 84 had completed the survey at a different location and were not invited to participate a second time, and 53 participants did not complete the entire survey. These individuals and partial survey responses were screened from the final data set. Overall, 20% of those who agreed to participate were screened as a result. (Table 1 provides complete details).

Table 1. Travellers screened from participation.

Winery location <sup>3</sup>	Travellers Approached	Agreed to Interview	Screened			Screened from Participation	
			Local Resident <sup>1</sup>	Previous participant	Incomplete Surveys	Total	Percent <sup>2</sup>
North Okanagan	1,633	1,219	204	30	9	243	19.9%
South Okanagan	1,558	1,252	143	54	44	241	19.2%
<b>Grand Total</b>	<b>3,191</b>	<b>2,471</b>	<b>347</b>	<b>84</b>	<b>53</b>	<b>484</b>	<b>19.6%</b>

1. The Local Area is defined as the Okanagan Valley, which includes the area south of Enderby and north of Osoyoos and all communities in the area of Lake Okanagan.

2. The percentage represents the number of surveys eliminated as a result of screening questions as a percentage of the total number who agreed to participate.

3. North Okanagan wineries include: Mission Hill, Cedar Creek, Elephant Island and Soaring Eagle. South Okanagan wineries include: Tinhorn Creek, Burrowing Owl & Nk'Mip.

Among those intercepted, 136 business travellers and 84 tour group participants completed an abbreviated survey. The majority (1,757 participants) were independent leisure travellers who completed the full version of the survey. There were an additional four business travellers and six independent leisure travellers who indicated that they would be away from home for 365 days or more. These visitors were deemed to be temporary residents and therefore not travellers and removed from further analysis. Overall, 80% of the surveys from those who agreed to participate were useable. (Table 2 provides complete details).

Table 2. Travellers completing useable surveys.

Winery location	Travellers	Agreed to	Survey Groups	Useable Surveys
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	Approached	Interview	Organized Tour Group	Business Travellers	Independent Leisure Travellers	Total	Percent <sup>1</sup>
North Okanagan	1,633	1,219	74	69	829	972	79.7%
South Okanagan	1,558	1,252	10	67	928	1,005	80.3%
<b>Grand Total</b>	<b>3,191</b>	<b>2,471</b>	<b>84</b>	<b>136</b>	<b>1,757</b>	<b>1,977</b>	<b>80.0%</b>

1. The percentage represents the number of surveys eliminated as a result of screening questions as a percentage of the total number who agreed to participate.

### Data Collection – E-Mail and Mailback

Participants were randomly asked if they were interested in participating in a follow-up study via either email or mailback. Those consenting to participate via mailback were sent the survey with a business reply envelope and a *British Columbia Magazine* in October 2008 after the intercept field season closed. The first mailing was followed by a second mailing of a reminder postcard and a third mailing of just a questionnaire and a business reply envelope. Responses were accepted until January 22<sup>nd</sup>, 2008. Those who consented to participate in the follow-up survey via email were sent an email invitation to participate in the survey in October 2008 and were sent subsequently three email reminders. The email survey initially closed on November 30<sup>th</sup>, 2008; however, it was re-opened for one week in early January 2009 in an extra attempt to increase response rates.

Two different versions of the follow-up questionnaire were produced; one for visitors agreeing to participate in the mailback survey and one for those agreeing to participate in the email, online survey. While the follow-up survey was deployed using 2 mediums (paper and online) the content and questions were identical. These questionnaires collected a variety of information including (see mailback questionnaire in Appendix B):

- trip duration,
- length of stay in British Columbia,
- length of stay in the Okanagan Valley,
- primary destination,
- destination decision-making,
- travel route and overnight stay information,
- trip activities,
- trip planning,
- travel services purchases prior to and during trip,
- primary accommodation,
- trip expenditures,
- satisfaction with experience at Okanagan Valley wineries,
- satisfaction with trip to British Columbia,
- the likelihood of returning to the Okanagan Valley and British Columbia, and,
- travel party demographics.

Overall, 816 respondents to the intercept survey were asked to participate in the mailback survey and 536 consented (66%). A total of 919 were asked to participate in the same follow-up survey via email and 634 agreed to do so (69%). Among these travellers, 247 completed surveys via mailback (46%) and 289 completed the same survey via email (also 46%). This resulted in 536 useable follow-up surveys for analysis.

Table 3. Mailback and email survey response from independent leisure travellers intercepted

	<b>Travellers Asked to Participate in Follow-up<sup>1</sup></b>	<b>Agreed to Complete Mailback</b>	<b>Incomplete Addresses</b>	<b>No Response</b>	<b>Useable Mailback Surveys</b>
Mailback	816	536 (65.7%)	6	171	<b>247 (46.1%)</b>
Email	919	634 (69.0%)	1	66	<b>289 (45.6%)</b>
<b>Grand Total</b>	<b>1,735</b>	<b>1,170 (67.4%)</b>	<b>7</b>	<b>293</b>	<b>536 (45.8%)</b>

1. This does not include business travellers (n=136) or those participating in an organized tour group (n=84). Also excluded are 347 local residents of the Okanagan region who were screened from the original intercept survey and the six independent leisure travellers who reported that they would be away from home for 365 days or more who were removed from the analysis.

### Data Analysis

Descriptive statistics were used to analyze and summarize results of the report. 'Don't know/No response' answers have been excluded from the analyses for all questions. The intercept survey included a shortened version for travellers who stated their primary purpose was work or business activities or who were participants of an organized tour. Business travellers and tour group participants were not invited to participate in the follow-up survey.

For most sections, the report presents results for all leisure travellers and depicts any possible differences by traveller origin and for low and high interest wine travellers. The exceptions to this are results for tour group participants and business travellers. These results have been presented in separate sections for these subgroups.

In an effort to provide practical and actionable information to meet stakeholders' operational or marketing needs, this report will focus on practical differences rather than statistically significant differences. The rationale for this approach is that very small and unimportant differences can be found to be statistically significant under certain circumstances. As such, this report typically only takes note of differences of  $\pm 10$  percentage points (ppts) or more. In the report's tables depicting traveller subgroup and traveller origin, differences that are 10 ppts or more higher than all independent leisure travellers are highlighted in blue, while differences that are 10 ppts or more lower are shown in red (Figure 1).

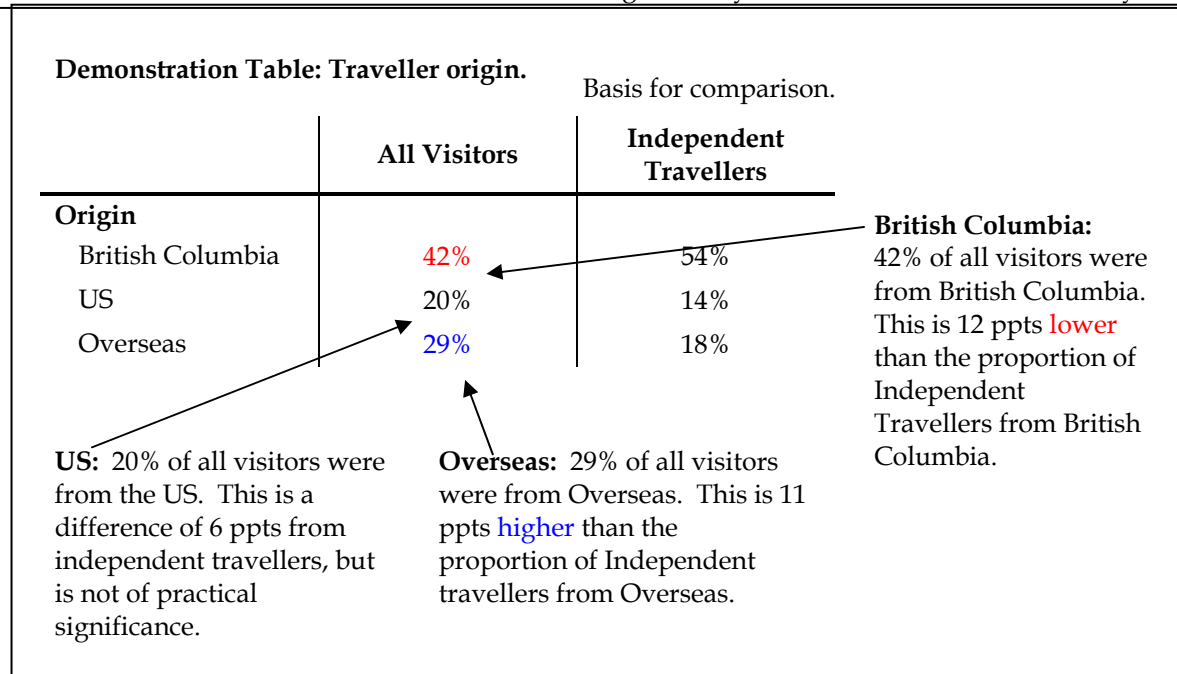


Figure 1. Interpreting the tables. Data is fictitious and for illustrative purposes only.

The study design produced 2 sets of data (the interview responses and the follow-up questionnaire responses). At all locations, the respondents and the responses could vary between the interview and mailback questionnaires because travellers could drop out of the study by not agreeing to complete the mailback questionnaire or by not completing the mailback questionnaire even if they had agreed to complete it (which could cause non-response bias). Both instances could cause the mailback questionnaire results to be unrepresentative of travellers interviewed on-site. Similarly, the responses to similar questions in the interview and mailback questionnaires could vary due to real differences in traveller behaviour (for example, a traveller may have intended to visit ten different wineries when they were interviewed during their trip but reported that they actually only visited 4 wineries on the mailback questionnaire completed after their trip).

Response biases were assessed to ensure validity of the final results by way of examining practical differences among the aforementioned data sets. Results of these assessments (Appendix C) and several other factors indicated that the interview information is the best source of data when the same or similar questions were asked on both the interview and mailback questionnaire. Thus, mailback questionnaire responses were used only when the question was not asked in the interview and when sample sizes permitted. All results presented in the remainder of this report are from the interview unless otherwise noted.

## Results

### **Traveller Characteristics – All participants**

Overall, over half (59%) of all winery visitors intercepted were from British Columbia (including those from the local area). The majority of British Columbia residents hailed from the Metro Vancouver / Fraser Valley area (54%) while an additional 25% of residents were from the Okanagan Valley. Exploring specific origin of British Columbia residents by travel group revealed that those from Metro Vancouver / Fraser Valley represented nearly three quarters (74%) of independent travellers, 63% of tour group participants, and 66% of business travellers.

Residents of Alberta represented 21% of those intercepted at the wineries, with over half (54%) of all Albertans hailing from Calgary and area. Those from Edmonton and area represented 26% of all Alberta residents. The proportion of Alberta residents from each of these areas was similar among independent leisure travellers.

Two-fifths (43%) of all those Canadian provinces other than BC and Alberta were from Ontario, with an additional thirds (34%) from Saskatchewan and Manitoba. Again, these proportions were similar among all independent leisure travellers from other Canadian provinces.

In total, residents of the United States made up 4% of those who were intercepted for the survey. The largest group of residents from the United States was from Washington (44%). Residents of Washington comprised 38% of all independent leisure travellers from the US; however, they represented 69% of all business travellers from the US. Residents of California represented the next largest group with 16% of all survey participants from the US; however, 27% of US visitors were from states other than Washington or California.

Those from other International origins comprised an additional 4% of the total sample with residents of European nations representing 71% of all other International winery visitors intercepted, and those from Asia-Pacific countries representing 20%. Over half of all European independent leisure travellers were from the United Kingdom, with an additional fifth (19%) from Germany and 8% each from France and the Netherlands. Among those from countries in the Asia Pacific region, nearly half (47%) were from Australia with virtually all independent leisure travellers from other International countries from Africa and the Middle East (Table 4).

Table 4: Origin of all survey participants by traveller group

	All Visitors		Independent Travellers		Tour Group Participants		Business Travellers	
	Number	%	Number	%	Number	%	Number	%
<b>Origin</b>								
British Columbia (all)	1,380	59.4%	903	51.4%	38	45.2%	92	67.6%
<i>Okanagan Valley</i> <sup>1</sup>	347	14.9%	---	---	---	---	---	---
<i>Metro Van/Fraser Valley</i>	752	32.4%	667	38.0%	24	28.6%	61	44.9%
<i>Vancouver Island</i>	159	6.8%	132	7.5%	9	10.7%	18	13.2%
<i>Other British Columbia</i>	122	5.2%	104	5.9%	5	6.0%	13	9.6%
Alberta (all)	481	20.7%	448	25.5%	28	33.3%	5	3.7%
<i>Calgary (and area)</i>	260	11.2%	242	13.8%	16	19.0%	2	1.5%
<i>Edmonton (and area)</i>	125	5.4%	118	6.7%	5	6.0%	2	1.5%
<i>Other Alberta</i>	96	4.1%	88	5.0%	7	8.3%	1	0.7%
Other Canada (all)	264	11.4%	234	13.3%	11	13.1%	19	14.0%
<i>Saskatchewan &amp; Manitoba</i>	90	3.9%	83	4.7%	4	4.8%	3	2.2%
<i>Ontario</i>	115	4.9%	103	5.9%	4	4.8%	8	5.9%
<i>Quebec</i>	43	1.9%	34	1.9%	1	1.2%	8	5.9%
<i>Other Canadian Province</i> <sup>2</sup>	16	0.7%	14	0.8%	2	2.4%	0	0.0%
US (all)	100	4.3%	81	4.6%	3	3.6%	16	11.8%
<i>Washington</i>	44	1.9%	31	1.8%	2	2.4%	11	8.1%
<i>California</i> <sup>2</sup>	16	0.7%	14	0.8%	0	0.0%	2	1.5%
<i>Other</i>	40	1.7%	36	2.0%	1	1.2%	3	2.2%
Other International	99	4.3%	91	5.2%	4	4.8%	4	2.9%
<i>Europe</i>	70	3.0%	67	3.8%	2	2.4%	1	0.7%
<i>Asia-Pacific</i> <sup>2</sup>	20	0.9%	17	1.0%	1	1.2%	2	1.5%
<i>Other International</i> <sup>2</sup>	6	0.3%	5	0.3%	1	1.2%	0	0.0%
<i>Unknown International</i> <sup>2</sup>	3	0.1%	2	0.1%	0	0.0%	1	0.7%
<b>Total</b>	<b>2,324</b>	<b>100.0%</b>	<b>1,757</b>	<b>100.0%</b>	<b>84</b>	<b>100.0%</b>	<b>136</b>	<b>100.0%</b>

1. Residents of the Okanagan Valley were identified as part of the interview and then screened from further participation.

2. Small sample size (i.e. 20 or fewer respondents) requires that results should be interpreted with caution.

Among independent leisure travellers interviewed at the wineries, over half were age 45 or over with the largest group (27%) in between the ages of 45 to 54. Although the largest group of visitors from British Columbia were also in the 45 to 54 year age range (27%), BC residents were more likely to be in the 35 to 44 year age range (21%) compared to visitors from other origins. Those from Alberta were very similar in age to visitors from all other origins, whereas those from other Canadian provinces and those from outside of Canada were more likely to be over 55 and less likely under 44. Two-fifths (41%) of visitors from other Canadian provinces were over the age 55, compared to 32% of visitors from other origins. Similarly, nearly a fifth (18%) of those from outside Canada were over the age 65, while this age category comprised 8% of visitors overall (Table 5). Generally, it was seen that the further away the market of origin, the older the visitor.

Over half (54%) of all independent leisure travellers held at least one university degree. This percent was very similar among visitors from British Columbia and Alberta (51% and 54%, respectively). Among those who lived in other Canadian provinces or who were visitors from other countries this number increases to 58% and 62%, respectively.

The largest percent (27%) of all independent leisure travellers reported household incomes between \$100,000 and \$149,000. Half of travellers (52%) reported household incomes over \$100,000. The percent reporting incomes over \$150,000 was lower among residents of British Columbia and higher among residents of Alberta and outside of Canada.

The gender split among visitors was relatively even with slightly more women (55%) than men (45%). There were no practical differences observed among visitors from British Columbia and those from other Canadian provinces. There were, however, more male travellers among those visiting from Alberta and outside of Canada (50% and 57%, respectively).

The follow-up survey asked participants to indicate whether there were any children under 18 living in the household. The majority of respondents (81%) indicated that there were no children living in the household.

Table 5: Demographic profile of independent leisure travellers by origin

	Leisure Travellers		BC		Alberta		Other Canada		Outside Canada	
	n	%	n	%	n	%	n	%	n	%
<b>Age</b>										
Under 24 Years	63	3.7%	28	3.2%	19	4.3%	10	4.4%	6	3.6%
25-34 Years	322	18.8%	181	20.5%	85	19.5%	30	13.3%	26	15.7%
35-44 Years	317	18.5%	186	21.1%	80	18.3%	31	13.8%	20	12.0%
45-54 Years	463	27.1%	234	26.5%	126	28.8%	61	27.1%	42	25.3%
55-64 Years	403	23.6%	189	21.4%	99	22.7%	72	32.0%	43	25.9%
65 Years or Older	143	8.4%	65	7.4%	28	6.4%	21	9.3%	29	17.5%
<b>Education</b>										
Less Than High School <sup>1</sup>	13	0.8%	5	0.6%	6	1.4%	2	0.9%	0	0.0%
High School	164	9.7%	89	10.1%	33	7.6%	24	10.8%	18	10.9%
Some Technical, College or University	243	14.3%	132	15.1%	61	14.1%	30	13.5%	20	12.1%
College or Technical Diploma	352	20.7%	193	22.0%	97	22.4%	38	17.0%	24	14.5%
University Degree	646	38.0%	326	37.2%	168	38.7%	86	38.6%	66	40.0%
Masters/PHD Degree	272	16.0%	124	14.1%	68	15.7%	43	19.3%	37	22.4%
Other <sup>1</sup>	9	0.5%	8	0.9%	1	0.2%	0	0.0%	0	0.0%



Table 6: Demographic profile of independent leisure travellers by origin (con't)

	Leisure Travellers		BC		Alberta		Other Canada		Outside Canada	
	n	%	n	%	n	%	n	%	n	%
<b>Annual household income</b>										
Less than \$25,000	48	3.6%	23	3.2%	11	3.3%	7	4.3%	7	5.9%
\$25,000 to \$49,999	91	6.9%	59	8.2%	14	4.2%	8	4.9%	10	8.4%
\$50,000 to \$64,999	168	12.7%	93	13.0%	33	10.0%	27	16.6%	15	12.6%
\$65,000 to \$99,999	328	24.7%	196	27.4%	67	20.3%	36	22.1%	29	24.4%
\$100,000 to \$149,999	362	27.3%	211	29.5%	88	26.7%	44	27.0%	19	16.0%
\$150,000 plus	331	24.9%	134	18.7%	117	35.5%	41	25.2%	39	32.8%
<b>Gender</b>										
Male	782	44.9%	369	41.1%	222	49.7%	95	41.5%	96	57.1%
Female	960	55.1%	529	58.9%	225	50.3%	134	58.5%	72	42.9%
<b>Household composition<sup>2</sup></b>										
Children	102	19.5%	56	19.6%	27	20.1%	14	19.7%	5	15.2%
No children	421	80.5%	229	80.4%	107	79.9%	57	80.3%	28	84.8%

1. Small sample size (i.e. under 20 respondents) requires that results should be interpreted with caution.

2. This question was asked on the follow-up survey only.

### Traveller Characteristics - Exploring wine travellers by experience and interest

Travellers from all groups were asked to indicate whether or not this was the first time they had gone wine touring. Overall, the majority (78%) indicated they had been wine touring in the past but almost a quarter (22%) indicated this was their first time. There were no practical differences observed between all visitors interviewed and both independent leisure travellers and business travellers; however, differences were seen between all visitors and tour group participants. Those who were travelling as part of a tour group were more than twice as likely to be taking their first wine tour (46%) compared to all visitors.

Table 7: Responses to the question, "Is this the first time you have gone wine touring?" by traveller group

	All Visitors		Independent Travellers		Tour Group Participants		Business Travellers	
	Number	%	Number	%	Number	%	Number	%
First time touring	420	21.5%	359	20.6%	38	46.3%	23	17.2%
Repeat wine touring	1,536	78.5%	1,381	79.4%	44	53.7%	111	82.8%
<b>Total</b>	<b>1,956</b>	<b>100.0%</b>	<b>1,740</b>	<b>100.0%</b>	<b>82</b>	<b>100.0%</b>	<b>134</b>	<b>100.0%</b>

Independent leisure travellers were asked about the level of importance that wine touring played in motivating their trip. Those who indicated that wine touring was either the 'primary' or an 'important reason' for the trip were classified as high interest wine travellers, while those for whom wine touring played either 'some role' or 'was not important at all' in planning were classified low interest wine travellers. Overall, just over half (55%) of all independent leisure travellers were found to be high interest wine travellers, while the remainder (45%) were found to be low interest travellers for whom wine touring did not play a prominent role in trip planning.

Comparing the level of wine interest of independent leisure travellers by origin showed only one practical difference; travellers from outside Canada were less likely to show high interest – an indication that wine touring was not an influencing factor on trip planning for this group. Among all other origin groups, however, the importance of wine touring as a factor influencing trip planning was distributed similarly to the overall proportions seen among independent leisure travellers.

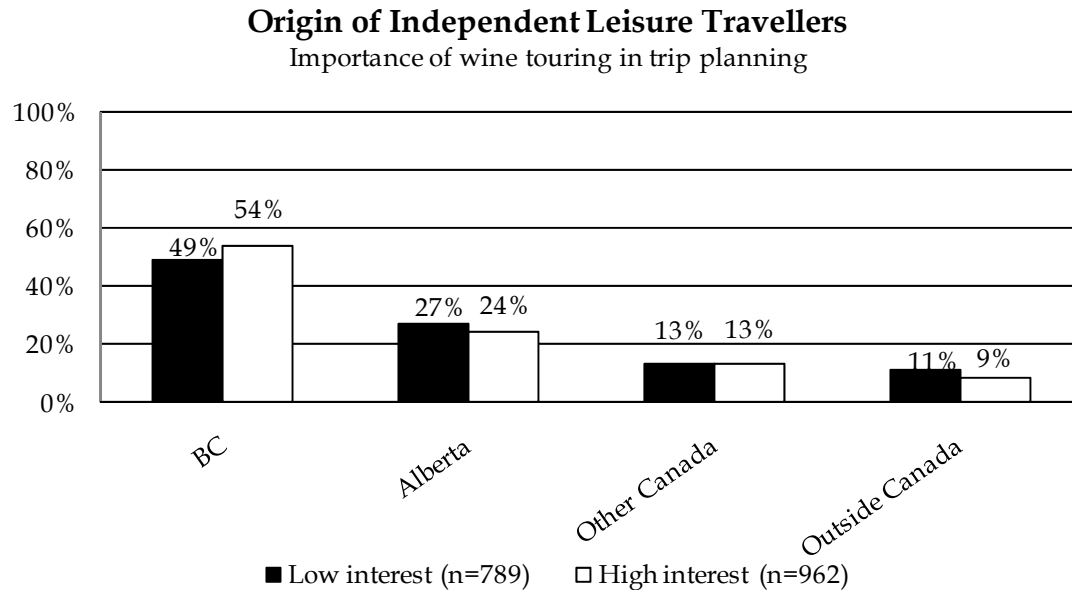


Figure 2. Percentage of independent leisure travellers by origin showing importance of wine touring for trip planning (low and high interest)

Exploring the demographic profile of high and low interest wine travellers revealed no practical differences. High interest wine travellers were less likely to be included in both the highest age category (over 65 years) and the lowest age category (under 24 years). They were, however, more likely to be between 55 and 64 years of age with over one quarter (26%) in this age group while a fifth (20%) of low interest wine travellers were in this same age category.

Although a university degree was the most common level of educational attainment for both groups, high interest wine travellers were more likely to have a graduate level of education (18% compared to 14% of low interest wine travellers). Those with a lower level of interest in wine travelling were more likely to report incomplete or completed high school (12% for these two categories combined compared to 9% among high interest wine travellers). Low interest wine travellers were also more likely to report a college or technical level diploma (23% compared to 19% of high interest wine travellers).

There were only small differences in terms of annual household income with those with low interest more likely to report incomes under \$25,000. Even so, this group only comprised 5% of low interest and 2% of high interest wine travellers. No differences were observed in terms of the gender distribution of these two groups.

Examining previous experience with wine touring in terms of the importance that wine touring played for trip planning, it is perhaps not surprising to find that those with a high interest in wine travel were less likely to report that this was their first time on a wine tour (18% compared to 24%).

Table 8: Demographic profile of leisure travellers by importance of wine touring for trip planning

	<b>Leisure Travellers</b>	<b>Low Interest</b>	<b>High Interest</b>
<b>Age</b>	<b>n=1,711</b>	<b>n=766</b>	<b>n=945</b>
Under 24 Years	4%	5.1%	2.5%
25-34 Years	19%	17.2%	20.1%
35-44 Years	19%	19.8%	17.5%
45-54 Years	27%	27.5%	26.7%
55-64 Years	24%	20.4%	26.1%
65 Years or Older	8%	9.9%	7.1%
<b>Education</b>	<b>n=1,699</b>	<b>n=760</b>	<b>n=939</b>
Less Than High School	0.8%	1.3%	0.3%
High School	9.7%	11.1%	8.5%
Some Technical, College or University	14.3%	14.5%	14.2%
College or Technical Diploma	20.7%	23.0%	18.8%
University Degree	38.0%	35.9%	39.7%
Masters/PHD Degree	16.0%	13.8%	17.8%
Other	0.5%	0.4%	0.6%
<b>Annual household income</b>	<b>n=1,328</b>	<b>n=592</b>	<b>n=736</b>
Less than \$25,000	3.6%	5.4%	2.2%
\$25,000 to \$49,999	6.9%	6.9%	6.8%
\$50,000 to \$64,999	12.7%	13.9%	11.7%
\$65,000 to \$99,999	24.7%	22.0%	26.9%
\$100,000 to \$149,999	27.3%	26.2%	28.1%
\$150,000 plus	24.9%	25.7%	24.3%
<b>Gender</b>	<b>n=1,742</b>	<b>n=784</b>	<b>n=958</b>
Male	44.9%	46.3%	43.7%
Female	55.1%	53.7%	56.3%

Table 9: Demographic profile of leisure travellers (con't)

	Leisure Travellers	Low Interest	High Interest
<b>Household composition</b>	<b>n=523</b>	<b>n=209</b>	<b>n=314</b>
Children	19.5%	23.9%	16.6%
No children	80.5%	76.1%	83.4%
<b>Experience wine touring</b>	<b>n=1,741</b>	<b>n=784</b>	<b>n=957</b>
First time touring	20.6%	24.2%	17.7%
Repeat wine touring	79.4%	75.8%	82.3%

For the follow-up survey, travellers were asked to indicate how many overnight leisure trips they had taken in the past two years that included a visit to a winery (to any destination). On average participants reported taking just under two winery trips (1.9 trips). The average number of winery trips was highest for visitors from outside of Canada (2.4 trips) followed by visitors from British Columbia (2.3 trips). Those from other Canadian provinces reported taking the least frequent wine trips with an average of 1.0 trip. Nearly a third (31%) of all visitors reported that they did not make any other trips in the last two years that included a visit to a winery. This number was lower among British Columbians (21%) and considerably higher among those from Canadian provinces other than BC and Alberta (48%) and those from outside Canada (41%).

Table 10: Number of trips taken in past two years that included a visit to a winery by origin

	Leisure Travellers (n=514)	BC (n=278)	Alberta (n=133)	Other Canada (n=71)	Outside Canada (n=32)
None	30.5%	21.2%	38.3%	47.9%	40.6%
One	16.7%	15.5%	18.0%	25.4%	3.1%
Two	25.1%	30.9%	20.3%	11.3%	25.0%
Three or more	27.6%	32.4%	23.3%	15.5%	31.3%
<i>Average number of trips</i>	1.93	2.27	1.59	1.01	2.44

Interestingly, looking at the average number of leisure trips taken in the past two years that included a visit to a winery by high and low interest wine travellers<sup>3</sup> revealed virtually no difference. Both high and low interest travellers reported taking an average of 1.9 trips. However, exploring the distribution of the total number of trips reveals the pattern that one would expect. For over a third (36%) of low interest wine travellers the trip on which they were originally interviewed represented the only trip they had taken that included a visit to a winery in the past two years. This was the case for considerably less (21%) of those who indicated that wine touring was important to trip planning.

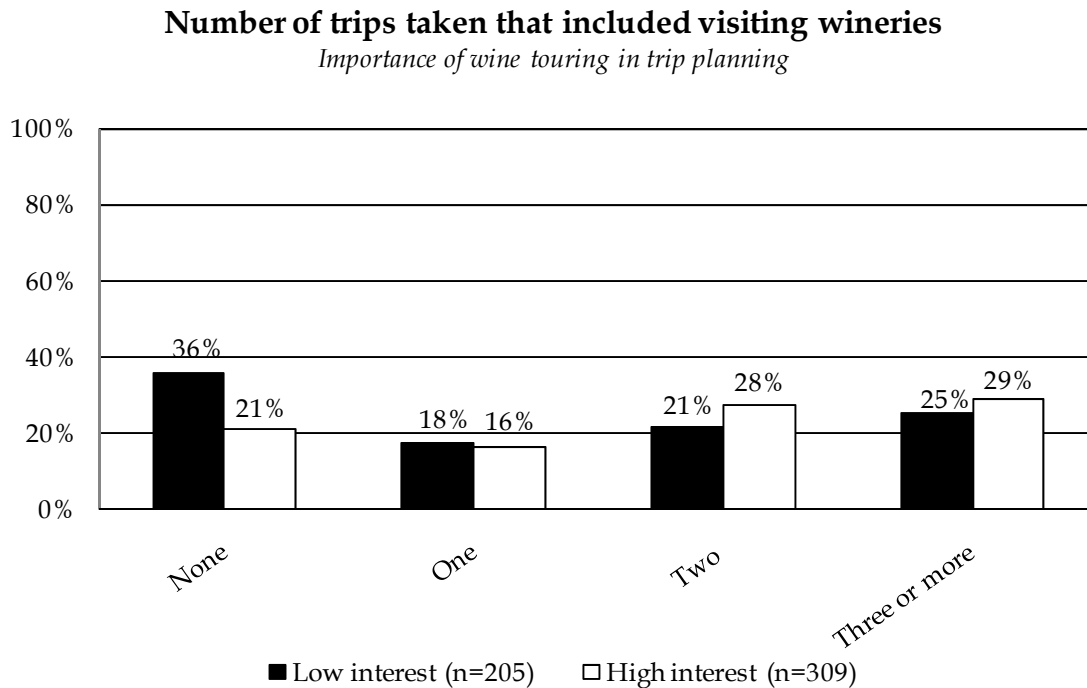


Figure 3. Total number of overnight, leisure trips taken (to BC and other destinations) that included visiting wineries in the past two years showing importance of wine touring for trip planning (low and high interest)

### Trip Characteristics

Among independent leisure travellers who were interviewed at one of the wineries, the majority (72%) indicated the primary purpose of the trip was for leisure. Virtually all of the remaining participants (27%) were travelling to visit friends or family. There were practical differences observed in that travellers from other Canadian provinces and outside of Canada were more likely to be visiting friends and family (47% and 44%, respectively) and less likely to be travelling for leisure (53% and 55%, respectively).

<sup>3</sup> High interest wine travellers are those visitors who indicated that wine touring was the Primary or Important Reason for their trip. Low interest wine travellers are those indicated that wine touring Played Some Role or was Not at all Important in planning their trip.

Virtually all travellers (94%) made use of a personal or rented vehicle (a car, truck or motorcycle) as their primary mode of transportation. This was true for all origin groups. Those from other Canadian provinces and outside of Canada were slightly more likely to indicate that they were travelling by RV (8% and 5%, respectively).

Half (50%) of all overnight travellers indicated that they were staying primarily in resort, hotel, motel and/or B&B properties. There were no practical differences observed by origin among those using these types of accommodation. Visitors from outside of Canada were slightly less likely to indicate that they were staying in a campground or RV park (12%), whereas those from other Canadian provinces and those from outside of Canada were more likely to indicate that they were staying with friends or relatives (32% and 33%, respectively). This is to be expected given that travellers from these origins were more likely to be travelling to visit friends and family. Travellers from Alberta were more likely to report that they were staying in a second home, timeshare, or rented home (12%).

Table 11: Primary trip purpose, mode of transportation, and accommodations of independent leisure travellers by origin

	All Visitors	BC	Alberta	Other Canada	Outside Canada
<b>Primary Trip Purpose</b>	<b>n=1,757</b>	<b>n=903</b>	<b>n=448</b>	<b>n=234</b>	<b>n=172</b>
Leisure	72.2%	79.3%	74.8%	53.0%	54.7%
Visiting Friends & Family	27.0%	20.3%	23.9%	46.6%	43.6%
Other <sup>12</sup>	0.8%	0.4%	1.3%	0.4%	1.7%
<b>Mode of Transportation</b>	<b>n=1,754</b>	<b>n=902</b>	<b>n=448</b>	<b>n=233</b>	<b>n=171</b>
Car/Truck/MC	94.4%	95.3%	96.0%	90.1%	91.2%
RV	3.9%	2.9%	3.6%	7.7%	5.3%
Bus <sup>1</sup>	0.3%	0.1%	0.0%	0.4%	2.3%
Bicycle <sup>1</sup>	0.9%	1.6%	0.2%	0.4%	0.0%
Other <sup>13</sup>	0.4%	0.1%	0.2%	1.3%	1.2%
<b>Primary Accommodations<sup>4</sup></b>	<b>n=1,743</b>	<b>n=891</b>	<b>n=448</b>	<b>n=233</b>	<b>n=171</b>
Resort/Hotel/Motel/B&B	49.8%	53.1%	45.5%	46.4%	48.5%
Campground/RV	15.5%	16.0%	16.5%	14.2%	12.3%
Friends or Relatives	24.9%	21.7%	24.3%	32.2%	33.3%
Second/rental homes/ Timeshares	8.2%	7.6%	11.8%	6.4%	4.1%
Other <sup>5</sup>	1.5%	1.6%	1.8%	0.9%	1.8%

1. Small sample size (i.e. under 20 respondents) requires that results should be interpreted with caution.

2. Other trip purpose responses included sporting event (n=7), to investigate real estate or move (n=4), learning English (n=1), homestay (n=1), and festival (n=1).

3. Other modes of transportation responses included air (n=3), train (n=3), and walking (n=1).

4. Daytrip travellers who were not using accommodation were removed from this analysis (n=10).

5. Other primary accommodations responses included cabin (n=15), hostel (n=6), car (n=2), boat (n=1), housesitting (n=1), self-contained unit (n=1), and everything (n=1).

There were practical differences observed between those for whom wine was of primary or high importance for trip planning compared to those for whom wine touring was not as important. Those

with a high interest in wine touring were much more likely to indicate that the primary purpose of their trip was leisure (81% compared to 62% of those reporting a low interest in wine touring). Conversely, over a third (36%) of low interest wine travellers indicated their primary purpose for travelling was to visit friends and family, while this was the case for less than one fifth (19%) of high interest wine travellers.

Virtually all independent leisure travellers intercepted for this study used a personal vehicle (car, truck or motorcycle) as their primary mode of transportation and this did not differ between high and low interest wine travellers.

Since considerably more low interest wine travellers indicated that they were travelling for the primary purpose of visiting with friends and family it is not surprising to find that there were considerably more travellers within this group who found accommodation with friends or relatives (33% of low interest compared to 18% of high interest wine travellers). Those who indicated that wine touring was of high importance while planning their trip were much more likely to indicate that they would be staying in resorts, hotels, motels, and bed and breakfasts. In total, over half (58%) of high interest wine travellers chose these types of accommodation, compared to 40% of low interest wine travellers.

Table 12: Primary trip purpose, mode of transportation, and accommodations of independent leisure travellers by importance of wine touring for trip planning

	Leisure Travellers	Low Interest	High Interest
<b>Primary Trip Purpose</b>	<b>n=1,757</b>	<b>n=788</b>	<b>n=962</b>
Leisure	72.2%	62.3%	80.5%
Visiting Friends & Family	27.0%	36.4%	19.1%
Other <sup>1</sup>	0.8%	1.3%	0.4%
<b>Mode of Transportation</b>	<b>n=1,754</b>	<b>n=787</b>	<b>n=962</b>
Car/Truck/MC	94.4%	94.7%	94.2%
RV	3.9%	4.2%	3.7%
Bus <sup>1</sup>	0.3%	0.3%	0.4%
Bicycle <sup>1</sup>	0.9%	0.5%	1.2%
Other <sup>1</sup>	0.4%	0.4%	0.4%
<b>Primary Accommodations</b>	<b>n=1,743</b>	<b>n=788</b>	<b>n=951</b>
Resort/Hotel/Motel/B&B	49.8%	39.8%	58.1%
Campground/RV	15.5%	16.2%	15.0%
Friends or Relatives	24.9%	33.5%	17.7%
Second or rental homes/Timeshares	8.2%	9.3%	7.3%
Other	1.5%	1.1%	1.9%

1. Small sample size (i.e. under 20 respondents) requires that results should be interpreted with caution.

Overall, just over one in ten (11%) of all independent leisure travellers were travelling through the Okanagan region on a touring trip with no particular destination. Those from British Columbia

reported touring at a slightly lower frequency (9%), especially compared to those from other Canadian provinces (16%).

Of those who were not touring, the vast majority (86%) selected a destination in British Columbia, in particular in the Okanagan Valley (75%). Travellers from British Columbia were more likely to indicate a destination in the Okanagan Valley (84%), whereas those from Canadian provinces other than BC and Alberta and from outside Canada were considerably less likely to indicate that their primary destination was in the Okanagan (55% and 50%, respectively). Visitors from these origins were more likely to indicate that they were destined for the Vancouver, Coast and Mountains region (20% & 21% of Other Canada and Outside Canada, respectively).

Table 13: Primary destination of independent leisure travellers by origin

	All Visitors (n=1,751)	BC (n=901)	Alberta (n=446)	Other Canada (n=233)	Outside Canada (n=171)
<b>None - touring</b>	<b>11.4%</b>	<b>8.9%</b>	<b>13.0%</b>	<b>15.5%</b>	<b>15.2%</b>
<b>Canada (all)</b>	<b>87.9%</b>	<b>90.6%</b>	<b>86.5%</b>	<b>83.3%</b>	<b>84.2%</b>
<b>British Columbia (all)</b>	<b>86.0%</b>	<b>88.8%</b>	<b>86.5%</b>	<b>80.3%</b>	<b>77.8%</b>
<i>Okanagan Valley</i>	74.6%	83.6%	76.5%	54.9%	49.7%
<i>Other Thompson Okanagan</i>	1.6%	1.7%	1.6%	2.1%	0.6%
<i>Vancouver, Coast &amp; Mtns.</i>	5.9%	0.3%	3.8%	20.2%	21.1%
<i>Vancouver Island</i>	1.3%	0.0%	3.1%	1.7%	2.3%
<i>Kootenay Rockies</i>	2.1%	2.4%	1.6%	0.9%	3.5%
<i>Northern BC<sup>1</sup></i>	0.2%	0.2%	0.0%	0.4%	0.6%
<i>Cariboo-Chilcotin Coast<sup>1</sup></i>	0.3%	0.6%	0.0%	0.0%	0.0%
Alberta	1.7%	1.4%	0.0%	2.6%	5.8%
<b>Other Destinations<sup>1,2</sup></b>	<b>0.9%</b>	<b>0.8%</b>	<b>0.4%</b>	<b>1.7%</b>	<b>1.2%</b>

1. Small sample size (i.e. under 20 respondents) requires that results should be interpreted with caution.

2. Other destinations include: Other Canada, US and International locations

Those with a high interest in wine touring were slightly more likely to indicate that they were touring with no specific destination (13% compared to 10% of low interest wine travellers). Among those who indicated a primary destination for their trip, however, there were only small differences observed between low and high interest wine travellers and none of these differences were determined to be of practical significance.



Table 14: Primary destination of independent leisure travellers by importance of wine touring for trip planning

	Leisure Travellers (n=1,746)	Low Interest (n=787)	High Interest (n=959)
<b>None - touring</b>	<b>11.4%</b>	<b>9.5%</b>	<b>13.0%</b>
<b>Canada (all)</b>	<b>87.9%</b>	<b>89.7%</b>	<b>86.4%</b>
<b>British Columbia (all)</b>	<b>86.0%</b>	<b>87.8%</b>	<b>84.6%</b>
<i>Okanagan Valley</i>	74.6%	75.6%	74.0%
<i>Other Thompson Okanagan</i>	1.6%	1.8%	1.5%
<i>Vancouver, Coast &amp; Mtns</i>	5.9%	5.7%	5.8%
<i>Vancouver Island</i>	1.3%	1.7%	0.9%
<i>Kootenay Rockies</i>	2.1%	2.3%	2.0%
<i>Northern BC<sup>1</sup></i>	0.2%	0.5%	0.0%
<i>Cariboo-Chilcotin Coast<sup>1</sup></i>	0.3%	0.3%	0.3%
Alberta	1.7%	1.7%	1.6%
<b>Other Destinations<sup>1</sup></b>	<b>0.9%</b>	<b>1.1%</b>	<b>0.8%</b>

1. Small sample size (i.e. under 20 respondents) requires that results should be interpreted with caution.

2. Other destinations include: Other Canada, US and International locations.

The vast majority of independent travellers interviewed at the wineries indicated that they would be spending some time in the region with less than one percent indicating that they were only passing through. This was true for travellers from all origins. On average, travellers indicated they would be spending 6 days in the region, 8 days overall in British Columbia and just under 10 days in total away from home. Medians have also been reported to depict the midpoint of total number of days reported by independent leisure travellers.

The median number of days in the Okanagan Valley for all independent leisure travellers was 4, with 6 days spent in British Columbia, and 7 days away from home in total. There were some practical differences observed by origin. Generally, those who had travelled further distances were more likely to report both an increase in the number of days they would be spending in British Columbia and the number of days they would be away from their homes. This increased to an average of 13 days in the province and 19 days away from home for visitors from outside of Canada (median of 11 and 14 days, respectively).

Table 15: Trip duration for independent leisure travellers by origin

	Leisure Travellers (n=1,755)		BC (n=903)		Alberta (n=448)		Other Canada (n=233)		Outside Canada (n=171)	
	Avg.	Median	Avg.	Median	Avg.	Median	Avg.	Median	Avg.	Median
Days in Okanagan Valley	5.7	4.0	5.0	4.0	6.9	5.0	5.6	4.0	6.1	4.0
Days in British Columbia	8.0	6.0	6.0	4.0	8.9	7.0	10.0	8.0	13.0	11.0
Total days away from home	9.7	7.0	6.5	5.0	10.0	7.0	15.1	10.0	18.9	14.0
No time in region - Passing through	0.6%		0.7%		0.7%		0.4%		0.0%	

Independent leisure travellers who indicated that visiting wineries was an important element in planning their trip also reported shorter trips compared to those for whom wine touring was not as important. Those with a high interest spent an average of 9 days away from home (median 6 days), whereas those with a low interest in wine touring reported an average of 11 days away from home (median 7 days). This pattern remained consistent for the total days spent in British Columbia and the total days spent in the Okanagan Valley.

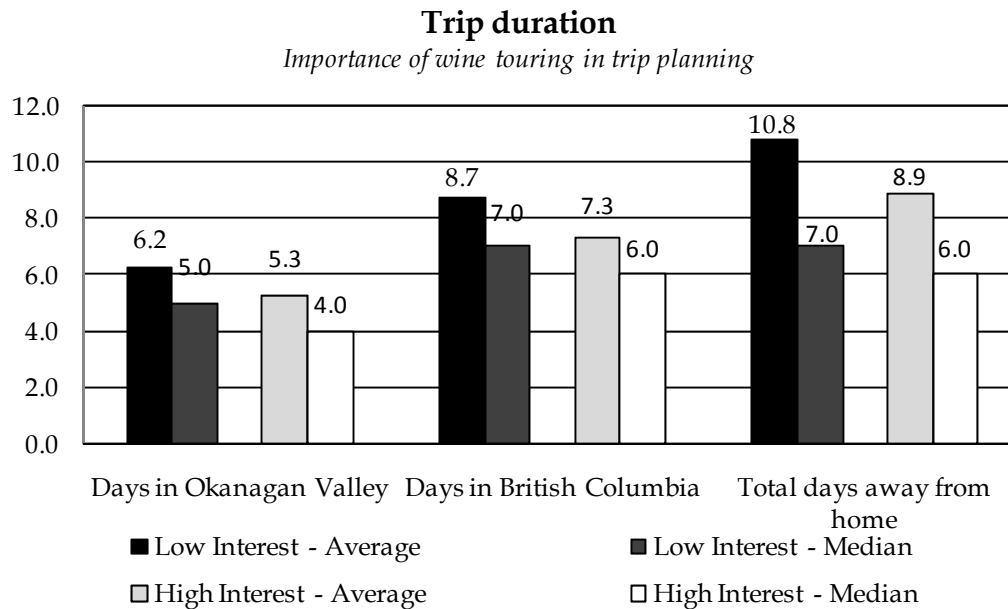


Figure 4. Average and median days spent in region, days in British Columbia and total days away from home showing importance of wine touring for trip planning (low and high interest)

During the survey at the wineries, travellers were asked to indicate the total number of persons travelling with them on this trip, including both the number of children under 18 and the number of adults over 18. On average, visitors indicated that they were travelling with just under 2 other people (2.8 persons including the survey participant). Less than one fifth of travellers (14%) indicated that they were travelling with children. Among those travelling without children the average party size was 2.6, whereas among those travelling with children the average party size was 4.6.

There were very few practical differences in terms of average travel party size by origin, however, the proportion of travellers who indicated they were travelling with children was higher for those from BC and Alberta compared to those from other Canadian provinces and those who resided outside of Canada. Travellers from Alberta were most likely to be travelling with children (15%), whereas those from outside of Canada were least likely (9%). The median number of travellers in a travel party across all groups was 2.0.

Table 16: Travel party size for independent travellers by origin

	Leisure Travellers (n=1,754)	BC (n=902)	Alberta (n=448)	Other Canada (n=233)	Outside Canada (n=171)
<b>Average party size (all)</b>	<b>2.84</b>	<b>2.95</b>	<b>2.81</b>	<b>2.60</b>	<b>2.64</b>
Average party size - without children	2.55	2.67	2.42	2.44	2.45
Average party size - with children	4.61	4.54	4.97	4.04	4.44
<i>Proportion with children</i>	13.8%	14.8%	15.4%	9.8%	9.3%

There were no practical differences observed in terms of average party size between low and high interest wine travellers with one notable exception. Those with a low interest in wine touring were considerably more likely to be travelling with children. Over one fifth (21%) of low interest wine travellers indicated they were travelling with at least one child under 18, whereas among high interest wine travellers 9% indicated the same.

Table 17: Travel party size for independent travellers by importance of wine touring in trip planning

	Leisure Travellers (n=1,754)	High Interest (n=962)	Low Interest (n=788)
<b>Average party size (all)</b>	<b>2.84</b>	<b>2.78</b>	<b>2.90</b>
Average party size - without children	2.55	2.60	2.48
Average party size - with children	4.61	4.74	4.55
<i>Proportion with children</i>	13.8%	9.0%	21.0%

On the follow-up survey, participants were asked to indicate who they were travelling with. Overall, 82% indicated that their travel party included their spouse or partner and this varied only slightly by origin. Nearly one fifth (19%) indicated that they were traveling with either their son or daughter. There were, however, some practical differences observed by origin. Travellers from Alberta and outside Canada were less likely to be travelling with their children (14% and 13%, respectively), whereas those from Canadian provinces other than BC and Alberta were more likely (32%). Follow-up survey participants were slightly more likely to indicate that they were travelling with other family members<sup>4</sup> (21%), although this was lower among residents of British Columbia (17%) and other Canadian provinces (16%). Nearly a third of travellers from Alberta (30%) and one quarter of those from outside Canada (25%) indicated that another family member was a part of their travel party. A total of 29% indicated they were travelling with friends and this was highest among those from other Canadian provinces (32%).

<sup>4</sup> Other family members included all cases where the participant indicated they were travelling with at least one person related to them in the following ways: mother, father, cousin, son-in-law-daughter-in-law, mother-in-law, father-in-law, grandson, granddaughter, brother, sister, sister-in-law, brother-in-law, niece, nephew, uncle, aunt, or relative – not specified.

Table 18: Relationship of travelling companions by origin

	All Visitors (n=239)	BC (n=136)	Alberta (n=64)	Other Canada (n=31)	Outside Canada (n=8)
Spouse or partner	81.6%	80.9%	81.3%	80.6%	100.0%
Children	19.2%	19.1%	14.1%	32.3%	12.5%
Other family	20.5%	16.9%	29.7%	16.1%	25.0%
Friends/Tenants	28.5%	30.9%	25.0%	32.3%	0.0%

Exploring the relationships among travel party members for high and low interest wine travellers revealed that those for whom wine touring was an important component of planning for this trip were slightly less likely to report travelling with their spouse than those for whom wine touring was of lesser importance. More considerable differences were seen in among those travelling with children (24% of low interest and 16% of high interest wine travellers, Figure 8) and those travelling with friends (24% of low interest and 32% of high interest). However, none of these differences were found to be practically significant.

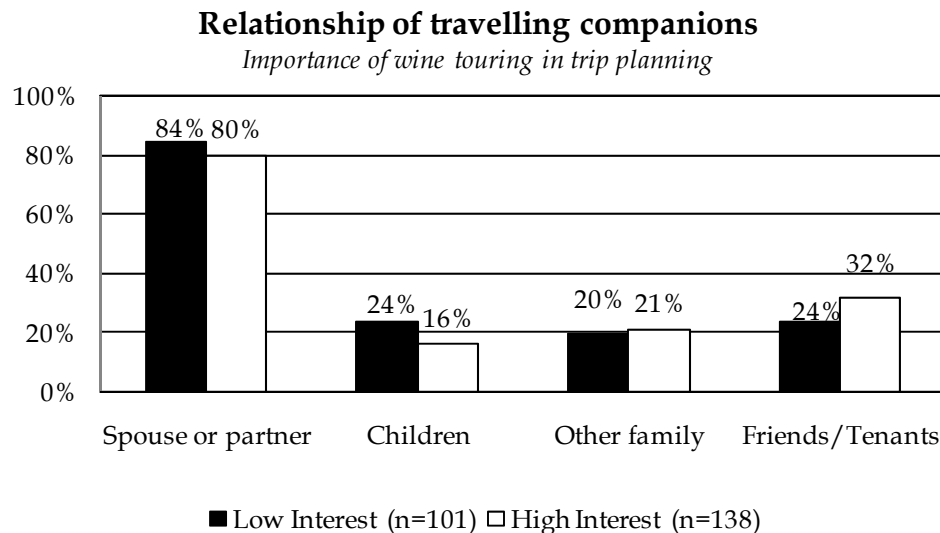


Figure 5. Relationship of travelling companions to survey participant showing importance of wine touring for trip planning (low and high interest)

## Trip Planning

A total of 64% of those participating in the follow-up survey indicated they did not consider a destination other than the one selected for this trip. Among those who did consider another destination, over half (57%) indicated that this alternate destination was in the Okanagan Valley. The next most popular other destinations cited were in the United States (20%) and the Vancouver, Coast and Mountains region (16%). A further 12% of survey participants who were considering other destinations indicated a location in the Thompson Okanagan that was outside of the Okanagan Valley area. There were, however, considerable practical differences observed by origin. Travellers from British Columbia were more likely to indicate they were considering another destination either in the Okanagan Valley (64%) or in another part of the Thompson Okanagan region (14%). As the origin of

travellers moved further away from the province, the likelihood they would consider another destination in the Okanagan decreased – to a low of 18% among those from outside of Canada. Travellers from Alberta were more likely to select a destination in the Vancouver, Coast and Mountains region (21%), whereas those from other Canadian provinces were more likely to state a destination in Alberta or the US (24%, each). Over half (55%) of all those from outside Canada indicated a destination on Vancouver Island and an additional 46% indicated a location in Alberta.

Table 19: Other destinations considered by origin

	<b>Leisure Travellers (n=189)</b>	<b>BC (n=110)</b>	<b>Alberta (n=39)<sup>1</sup></b>	<b>Other Canada (n=29)<sup>1</sup></b>	<b>Outside Canada (n=11)<sup>1</sup></b>
Okanagan Valley	56.6%	63.6%	56.4%	44.8%	18.2%
Other Thompson Okanagan	11.6%	13.6%	12.8%	3.4%	9.1%
Kootenay Rockies	11.1%	10.9%	10.3%	13.8%	9.1%
Vancouver, Coast and Mountains	16.4%	12.7%	20.5%	20.7%	27.3%
Vancouver Island	11.1%	6.4%	5.1%	20.7%	54.5%
Cariboo Chilcotin Coast <sup>1</sup>	1.6%	2.7%	0.0%	0.0%	0.0%
Northern BC <sup>1</sup>	2.1%	2.7%	0.0%	0.0%	9.1%
Alberta	11.1%	3.6%	12.8%	24.1%	45.5%
Other Canada <sup>1</sup>	3.2%	0.0%	5.1%	6.9%	18.2%
US	19.6%	18.2%	20.5%	24.1%	18.2%
Other International <sup>1</sup>	1.1%	0.0%	0.0%	0.0%	18.2%
Other - not specified <sup>1</sup>	4.2%	5.5%	0.0%	3.4%	9.1%

1. Small sample size requires that results should be interpreted with caution.

There were very few differences observed in terms of alternate destinations or routes considered by low interest and high interest wine travellers. In general, those who indicated that wine touring was of high importance in trip planning were slightly more likely to choose a destination in the Okanagan Valley and less likely to indicate that they also considered travelling to another destination in British Columbia. However, these differences were not determined to be of practical significance.

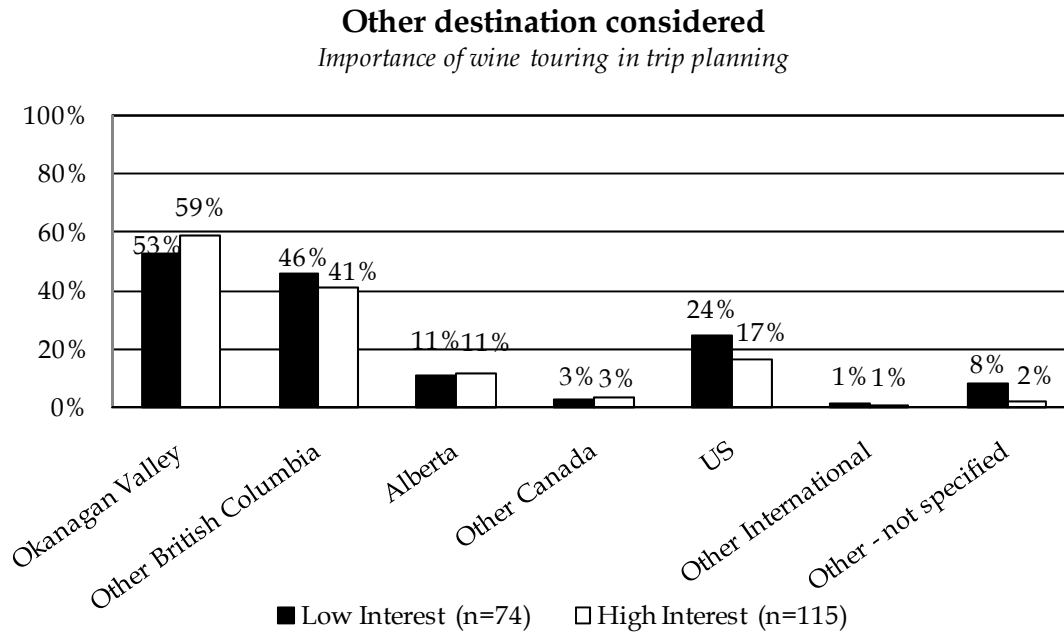


Figure 6. Other destination or route considered when planning trip showing importance of wine touring for trip planning (low and high interest)

Nearly a third (31%) of participants in the follow-up survey reported that they started planning their trip nine to twelve weeks in advance, with an additional 30% planning between three and eight weeks in advance and 17% planning thirteen or more weeks in advance. Although the largest group of travellers from British Columbia also started planning between nine and twelve weeks. BC residents typically had shorter planning horizons. Overall, 27% of this group planned their trips two weeks or less before the day of departure. Those from other origins tended to have longer planning horizons.

Table 20: Trip planning horizons by origin

	Leisure Travellers (n=446)	BC (n=252)	Alberta (n=115)	Other Canada (n=54)	Outside Canada (n=25)
Day of visit <sup>1</sup>	0.9%	1.6%	0.0%	0.0%	0.0%
1-6 days	6.7%	7.5%	5.2%	1.9%	16.0%
1-2 weeks	14.3%	18.3%	7.8%	11.1%	12.0%
3-8 weeks	30.0%	26.2%	38.3%	37.0%	16.0%
9-12 weeks	31.4%	31.7%	31.3%	27.8%	36.0%
13 weeks+	16.6%	14.7%	17.4%	22.2%	20.0%

1. Small sample size (i.e. under 20 respondents) requires that results should be interpreted with caution.

Generally, those with a high interest in wine touring tended to have longer trip planning horizons than those with a low interest. Just over one quarter (27%) of low interest wine travellers had travel planning horizons of two weeks or less, while the same was true for less than a fifth (17%) of high interest wine travellers.

### Trip planning horizons

Importance of wine touring in trip planning

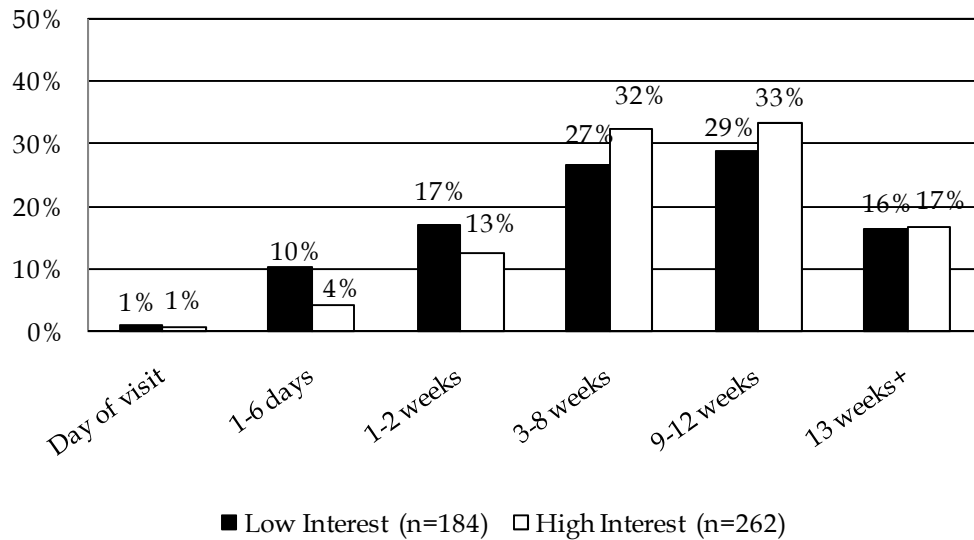


Figure 7. Trip planning horizons showing importance of wine touring for trip planning (low and high interest)

When asked what was their first consideration when planning their trip (aside from cost and budgetary considerations), nearly half of all participants (48%) indicated that they selected a destination first and then decided to include wineries as part of their trip. The percentage who stated that this was their rationale for trip planning was highest among those from other Canadian provinces (56%). Just over one fifth of participants (23%) stated that they started by deciding on a trip that included wineries and subsequently selected the Okanagan as their destination. Among British Columbia residents, however, this number increased to almost a third (31%). A total of 14% of participants indicated that someone else planned the trip and, hence, they had a lesser role in selecting the destination. This was highest among participants from Alberta where 22% indicated that someone else had planned the trip.

Table 21: Primary consideration (not including cost) of trip planning by origin

	Leisure Travellers (n=526)	BC (n=288)	Alberta (n=133)	Other Canada (n=71)	Outside Canada (n=34)
Selected destination first	47.5%	47.2%	44.4%	56.3%	44.1%
Decided to visit wineries first	22.8%	30.6%	14.3%	8.5%	20.6%
Someone else planned the trip	14.4%	10.4%	21.8%	18.3%	11.8%
Considered something else first	15.2%	11.7%	19.6%	16.8%	23.4%

1. Small sample size (i.e. under 20 respondents) requires that results should be interpreted with caution.

Although both high and low interest wine travellers indicated most often that they thought about a destination for their trip first and then decided to visit wineries, those with a high interest in wine touring were much more likely to state that they started planning by deciding to visit wineries and then selected a primary destination for their trip. Over half of all low interest wine travellers (55%) indicated that the destination was the first element of the trip that they selected, compared to 42% of high interest wine travellers. Over a third (34%) of high interest wine travellers, however, decided to plan a trip to visit wineries and subsequently chose a destination in the Okanagan. This compared to only 6% of low interest wine travellers who indicated the same trip planning priorities. Low interest wine travellers were also more likely to indicate that someone else planned their trip (19% compared to 11% of high interest wine travellers).

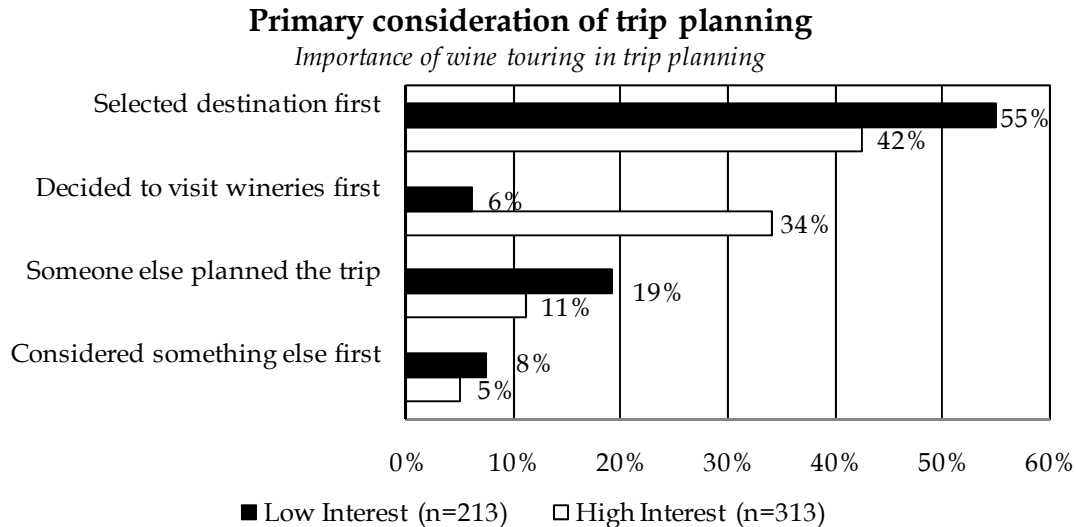


Figure 8. Primary consideration in trip planning (not including cost) showing importance of wine touring for trip planning (low and high interest). Only those responses which received 5% or more of the total have been shown in the figure.

Over a third (37%) of all independent leisure travellers indicated that the primary motivation for taking this trip was to spend quality time with family and/or friends. The percent of travellers who indicated this was their primary motivation was higher among those from other Canadian provinces (49%) and outside Canada (47%). A desire to rest, relax, and recuperate was cited by 29% of leisure travellers. Conversely, this reason was offered less often among those from other Canadian provinces (14%) and those from outside Canada (12%). Less than one fifth (17%) of travellers indicated that the primary motivation for this trip was related to the wine and winery experience.<sup>5</sup> This was slightly higher among British Columbia residents where 20% of travellers from this origin stated that wine and the winery experience was a primary motivating factor.

<sup>5</sup> Representing the sum of those who stated one of the following: Because I have a passion for wine, To experience the wine I buy from stores/restaurants at its own winery, to learn more about the wine making process, and general write-in comments about wine and wine touring.



Table 22: Primary motivation for travel by origin

	<b>Leisure Travellers (n=530)</b>	<b>BC (n=289)</b>	<b>Alberta (n=136)</b>	<b>Other Canada (n=71)</b>	<b>Outside Canada (n=34)</b>
To spend quality time with family/friends	36.6%	31.5%	38.2%	49.3%	47.1%
To rest, relax and recuperate	29.1%	30.8%	37.5%	14.1%	11.8%
Because I have a passion for wine	9.6%	12.1%	8.1%	1.4%	11.8%
To experience the wine I buy from stores/restaurants at its own winery	5.5%	7.3%	2.9%	5.6%	0.0%
To do something I always wanted to do	4.5%	5.2%	1.5%	8.5%	2.9%
To be closer/experience the natural environment	4.5%	4.2%	2.2%	8.5%	8.8%
To experience adventure & excitement <sup>1</sup>	2.3%	1.7%	2.9%	1.4%	5.9%
To learn more about wine making process <sup>1</sup>	1.3%	0.7%	1.5%	4.2%	0.0%
To experience different culture/ ways of life <sup>1</sup>	0.9%	0.7%	0.0%	0.0%	8.8%
To experience intimacy and romance <sup>1</sup>	0.6%	1.0%	0.0%	0.0%	0.0%
To visit a popular, trendy place <sup>1</sup>	0.4%	0.0%	0.7%	1.4%	0.0%
To enjoy the group experience <sup>1</sup>	0.4%	0.7%	0.0%	0.0%	0.0%
To go somewhere/see sights I've never seen before <sup>1</sup>	0.4%	0.0%	0.0%	2.8%	0.0%
Other <sup>1</sup>	4.0%	4.1%	4.4%	2.8%	2.0%

1. Small sample size (i.e. under 20 respondents) requires that results should be interpreted with caution.

There were considerable differences in primary motivation expressed between low and high interest wine travellers. Nearly half (48%) of low interest wine travellers indicated that the primary motivation for this trip was to spend quality time with family and friends, compared to less than a third (29%) of high interest wine travellers. This is consistent with previous findings which show that low interest wine travellers were more likely to travel for the purposes of visiting friends and family and more likely to find primary accommodation in the homes of friends and relatives. Conversely, and perhaps not surprisingly, 14% of high interest wine travellers indicated that their primary motivation was because they have a passion for wine, compared to only 3% of low interest wine travellers. Combined, all motivating factors that concerned wine and the winery experience were the primary motivating factor for 25% of all high interest wine travellers and only 5% of low interest wine travellers.

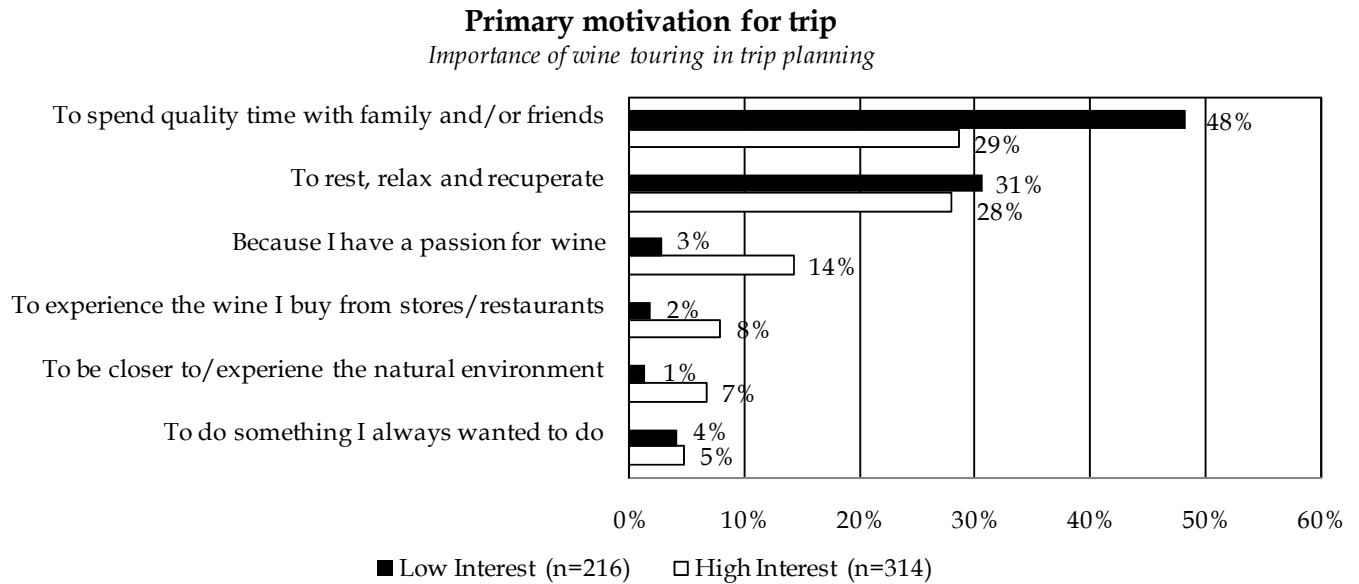


Figure 9. Primary motivation for taking trip showing importance of wine touring for trip planning (low and high interest). Only those responses which received 5% or more of the total have been shown in the figure.

The follow-up survey asked independent leisure travellers to identify which sources of information they had used before their trip to assist with planning. Individual participants mentioned using up to 17 different sources of information with an average of 4.8 sources cited per participant (median 5 sources). A total of 60% of survey participants mentioned that they relied upon information from friends and relatives, while 55% had prior experience visiting Okanagan Valley wineries from which to draw on. Tourism guides and books were also popular with nearly half (49%) citing these as a source of information, as were maps (48%). Combined, Internet sites were the most frequently cited source of information with two thirds (66%) of all leisure travellers relying on at least one of these sources. This included local and regional tourism websites (36%), winery websites (33%), and [www.helloBC.com](http://www.helloBC.com) (18%). Nearly one quarter (24%) relied upon information gathered from advertisement sources, including magazines (21%), newspapers (8%), and TV (3%).

There were very few practical differences observed by origin of the traveller. Those from Canadian provinces other than British Columbia and Alberta were less likely to be able to draw on past experience both at Okanagan Valley wineries in general and at the specific winery at which they were originally interviewed. Travellers from outside Canada were also less likely to use other specific winery sources, such as brochures and websites. Interestingly, nearly a third (31%) of travellers from other Canadian provinces made use of [www.helloBC.com](http://www.helloBC.com). Travellers from British Columbia and Alberta cited a median of five sources of information, whereas those from other Canadian provinces and outside of Canada cited four.

Table 23: Information sources used before trip by origin

	Leisure Travellers (n=516)	BC (n=281)	Alberta (n=133)	Other Canada (n=70)	Outside Canada (n=32)
Advice from friends/relatives	60.1%	54.4%	66.2%	70.0%	62.5%
Past experience visiting wineries in the Okanagan Valley	54.8%	64.8%	54.1%	30.0%	25.0%
Tourism/travel/visitor guides or books	49.0%	47.3%	50.4%	55.7%	43.8%
Maps	47.9%	47.7%	46.6%	48.6%	53.1%
Have visited the winery before	44.2%	53.7%	41.4%	21.4%	21.9%
A local or regional tourism website	35.9%	34.9%	37.6%	34.3%	40.6%
A winery website	32.8%	37.0%	29.3%	28.6%	18.8%
Visitor centres	27.5%	26.0%	30.1%	28.6%	28.1%
Other Internet site	23.4%	23.1%	25.6%	18.6%	28.1%
Winery business brochures	21.1%	23.5%	21.1%	18.6%	6.3%
Advertising in magazines	20.5%	23.8%	14.3%	17.1%	25.0%
www.HelloBC.com	18.0%	17.8%	13.5%	31.4%	9.4%
Wine/culinary related website	14.7%	16.0%	12.8%	14.3%	12.5%
Traveller review site	11.6%	11.4%	8.3%	18.6%	12.5%
A restaurant rating/review site	7.9%	8.5%	8.3%	4.3%	9.4%
Advertising in newspapers	7.8%	6.8%	9.8%	8.6%	6.3%
Tourism specific business referrals	6.6%	6.0%	9.0%	5.7%	3.1%
1-800-HelloBC <sup>1</sup>	3.5%	3.2%	3.0%	7.1%	0.0%
Advertising on TV <sup>1</sup>	2.7%	3.2%	1.5%	2.9%	3.1%
Tour operators/travel agents <sup>1</sup>	2.7%	1.8%	3.8%	4.3%	3.1%
Travel/consumer shows <sup>1</sup>	2.7%	1.4%	4.5%	4.3%	3.1%
Other source of information <sup>1</sup>	3.7%	3.2%	6.0%	2.9%	0.0%
Average/median number of sources used	4.8/5.0	5.0/5.0	4.9/5.0	4.6/4.0	3.9/4.0

1. Small sample size (i.e. under 20 respondents) requires that results should be interpreted with caution.

There were a number of differences between the information sources used by low interest and high interest wine travellers. Notably, high interest wine travellers were more likely to seek information from friends and relatives compared to low interest travellers (64% and 54%, respectively). High interest wine travellers were also more likely to cite previous experience both in the Okanagan Valley (58% compared to 50%) and at the specific winery (47% compared to 39%) as a source of information. High interest wine travellers were also considerably more likely to seek information on both general and specific websites. Local or regional tourism websites were cited by 40% of high interest travellers compared to 29% of low interest wine travellers, winery websites were cited by 40% of high interest compared to 22% of low interest travellers, and wine and culinary related websites were cited by 21% of high interest compared to only 5% of low interest wine travellers. Conversely, low interest wine travellers were slightly more likely to seek information at visitor centres (31% compared to 25% of high interest travellers) and through advertisements in newspapers (11% compared to 6% of low interest wine travellers). Overall, nearly three quarters (73%) of high interest wine travellers turned to

the Internet in some form for information to plan their trips, while just over half (54%) of low interest wine travellers did the same. High interest wine travellers also used slightly more sources of information (average 5.2) compared to low interest wine travellers (average 4.2).

### Information sources used before trip for planning

*Importance of wine touring in trip planning*

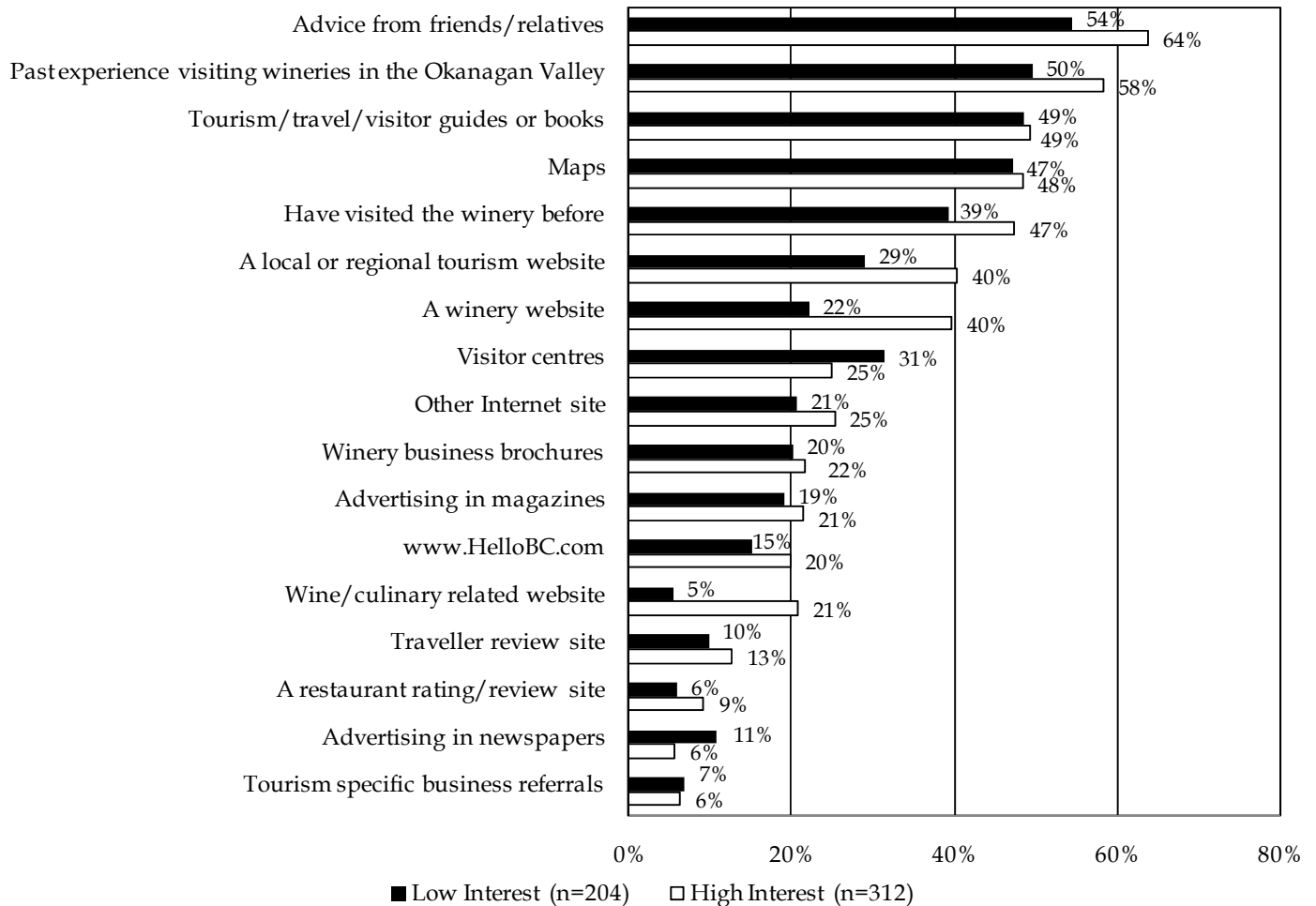


Figure 10. Information sources used before trip for planning showing importance of wine touring for trip planning (low and high interest). Only those responses which received 5% or more of the total have been shown in the figure.

The follow-up survey asked travellers to indicate which three information sources they used for trip planning they felt were most useful. Nearly half (42%) of all leisure travellers state that advice from friends and relatives was useful. This was fairly consistent across visitor origins with the exception of those travelling from other Canadian provinces. Overall, 59% of travellers from provinces other than British Columbia and Alberta stated that this was a useful source while just over a third (37%) of BC residents found family/friends' advice to be most useful.

Over a third of participants indicated that drawing from past experience visiting wineries in the Okanagan Valley was a useful source for trip planning. This ranged from a high of 44% among British

Columbians to a low of 13% among those from outside of Canada. Travel and visitor guides and books (32%), maps (27%), previous visits to the winery (21%) and local or regional tourism websites (21%) were all found to be useful by over a third of all independent leisure travellers. Those from outside Canada were more likely to state that maps (40%) and local or regional tourism websites (33%) were useful sources of information for trip planning.

Table 24: Information sources found most useful by origin

	<b>Leisure Travellers (n=464)</b>	<b>BC (n=253)</b>	<b>Alberta (n=116)</b>	<b>Other Canada (n=65)</b>	<b>Outside Canada (n=30)</b>
Advice from friends/relatives	42.0%	36.8%	44.0%	58.5%	43.3%
Past experience visiting wineries in the Okanagan Valley	35.6%	43.5%	32.8%	20.0%	13.3%
Tourism/travel/visitor guides or books	31.9%	27.7%	35.3%	41.5%	33.3%
Maps	26.5%	24.5%	28.4%	24.6%	40.0%
Have visited the winery before	20.9%	28.5%	13.8%	7.7%	13.3%
A local or regional tourism website	20.5%	21.3%	15.5%	20.0%	33.3%
Visitor centres	18.8%	16.6%	25.0%	15.4%	20.0%
A winery website	15.5%	20.2%	10.3%	7.7%	13.3%
Other Internet site	11.4%	11.9%	10.3%	9.2%	16.7%
Winery business brochures	10.8%	11.9%	11.2%	9.2%	3.3%
www.HelloBC.com	9.9%	9.9%	7.8%	16.9%	3.3%
Advertising in magazines	8.4%	9.1%	6.9%	6.2%	13.3%
Wine/culinary related website	5.8%	7.5%	1.7%	7.7%	3.3%
Traveller review site <sup>1</sup>	3.9%	3.6%	4.3%	4.6%	3.3%
Tourism specific business referrals <sup>1</sup>	3.7%	4.3%	3.4%	1.5%	3.3%
Advertising in newspapers <sup>1</sup>	3.0%	1.6%	4.3%	6.2%	3.3%
A restaurant rating/review site <sup>1</sup>	2.2%	2.8%	0.0%	1.5%	6.7%
Advertising on TV <sup>1</sup>	1.3%	0.8%	1.7%	3.1%	0.0%
1-800-HelloBC <sup>1</sup>	1.1%	0.8%	1.7%	1.5%	0.0%
Tour operators/travel agents <sup>1</sup>	0.9%	0.4%	1.7%	0.0%	3.3%
Travel/consumer shows <sup>1</sup>	0.9%	0.8%	1.7%	0.0%	0.0%
Other source of information <sup>1</sup>	2.6%	2.4%	5.2%	0.0%	0.0%

1. Small sample size (i.e. under 20 respondents) requires that results should be interpreted with caution.

The information sources rated as most useful for trip planning were very similar for low and high interest wine travellers, with a few exceptions. While nearly a third (31%) of low interest wine travellers selected maps as a most useful source, the same was true for less than one quarter (24%) of high interest wine travellers. Conversely, 24% of high interest travellers rated local or regional tourism websites among the sources they found most useful, while only 16% of low interest wine travellers mentioned this as a useful source of information. Much larger differences, however, were seen in the number of high and low interest wine travellers who rated wine specific websites as useful sources of information. One fifth (20%) of high interest wine travellers indicated that the information on a winery website was most useful for trip planning, while only 8% of low interest wine travellers mentioned this as a top source. Similarly, 8% of high interest and only 2% of low interest wine travellers included wine and culinary related websites among their top information sources in terms of their value for trip planning.

### Information sources most useful for trip planning

*Importance of wine touring in trip planning*

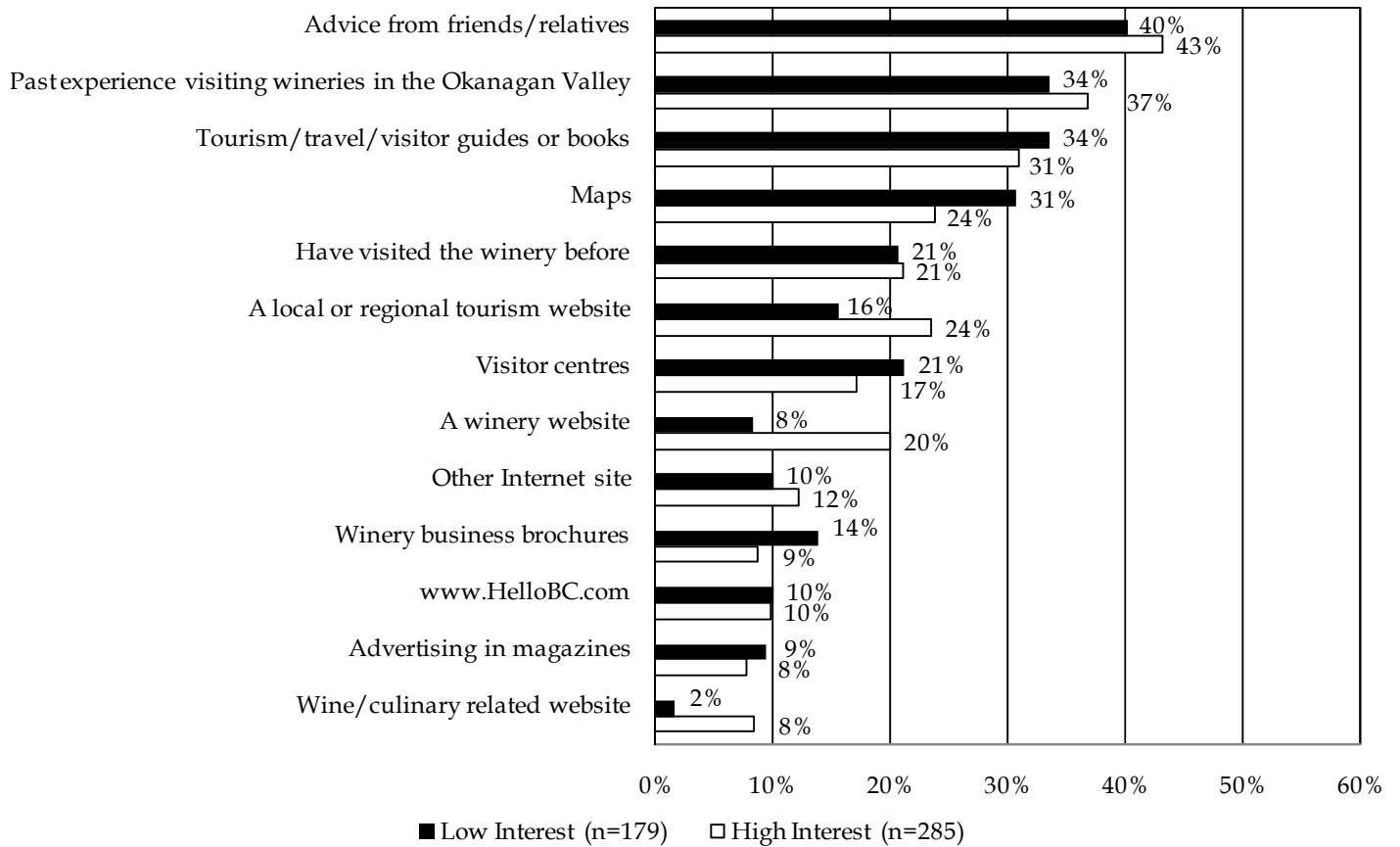


Figure 11. Top three information sources selected as most useful for trip planning showing importance of wine touring for trip planning (low and high interest). Only those responses which received 5% or more of the total have been shown in the figure.

Maps were the most frequently mentioned information sources used by independent leisure travellers during their trip (53%). The number of travellers from outside of Canada using maps during travel jumped to over two thirds (69%), whereas among BC residents, just under half (49%) made use of the same information source. More than half of all independent leisure travellers (53%) mentioned referring to travel guides or books, while 44% referenced advice from friends and relatives. Visitor centres were also an important source of information for travellers (41%). As above, those who lived in Canadian provinces other than British Columbia and Alberta and those from outside Canada were less likely to indicate that they relied on information from past visits to the Okanagan Valley and previous visits to the winery.

Table 25: Information sources used during trip by origin

	<b>Leisure Travellers (n=467)</b>	<b>BC (n=251)</b>	<b>Alberta (n=119)</b>	<b>Other Canada (n=65)</b>	<b>Outside Canada (n=32)</b>
Maps	53.1%	49.4%	57.1%	52.3%	68.8%
Tourism/travel/visitor guides or books	52.5%	49.4%	58.8%	55.4%	46.9%
Advice from friends/relatives	44.3%	37.8%	52.9%	50.8%	50.0%
Visitor Centres	40.5%	39.4%	41.2%	46.2%	34.4%
Past experience visiting wineries in the Okanagan Valley	35.1%	39.0%	36.1%	23.1%	25.0%
Winery business brochures	34.0%	35.5%	31.1%	35.4%	31.3%
Have visited the winery before	29.8%	34.3%	28.6%	18.5%	21.9%
Advertising in magazines	16.7%	16.3%	19.3%	13.8%	15.6%
Tourism specific business referrals	13.5%	13.5%	12.6%	13.8%	15.6%
A winery website	10.3%	10.4%	7.6%	15.4%	9.4%
A local or regional tourism website	9.2%	7.2%	13.4%	9.2%	9.4%
Advertising in newspapers	6.2%	5.2%	7.6%	6.2%	9.4%
Other Internet site	5.1%	4.8%	6.7%	3.1%	6.3%
Wine/culinary related website	4.9%	5.2%	3.4%	6.2%	6.3%
www.HelloBC.com	4.7%	5.6%	2.5%	7.7%	0.0%
A restaurant rating/review site	4.7%	4.4%	6.7%	3.1%	3.1%
Tour operators/travel agents <sup>1</sup>	3.6%	2.0%	5.0%	4.6%	9.4%
1-800-HelloBC <sup>1</sup>	2.1%	2.4%	2.5%	0.0%	3.1%
Traveller review site <sup>1</sup>	1.5%	0.4%	3.4%	1.5%	3.1%
Travel / consumer shows <sup>1</sup>	1.5%	1.2%	2.5%	1.5%	0.0%
Advertising on TV <sup>1</sup>	1.1%	0.0%	1.7%	1.5%	6.3%
Other source of information	4.3%	5.2%	2.5%	6.2%	0.0%

1. Small sample size (i.e. under 20 respondents) requires that results should be interpreted with caution.

With respect to the information sources used during travel high and low interest wine travellers were very similar. High interest wine travellers were, however, more likely to indicate that they used a map while travelling (57% compared to 47% for low interest travellers). High interest wine travellers were also slightly more likely to rely upon winery brochures, previous visits to the winery, and referrals made by tourism businesses (including hotels, restaurants, etc.). Low interest wine travellers were slightly more likely to seek information from friends and relatives while travelling.

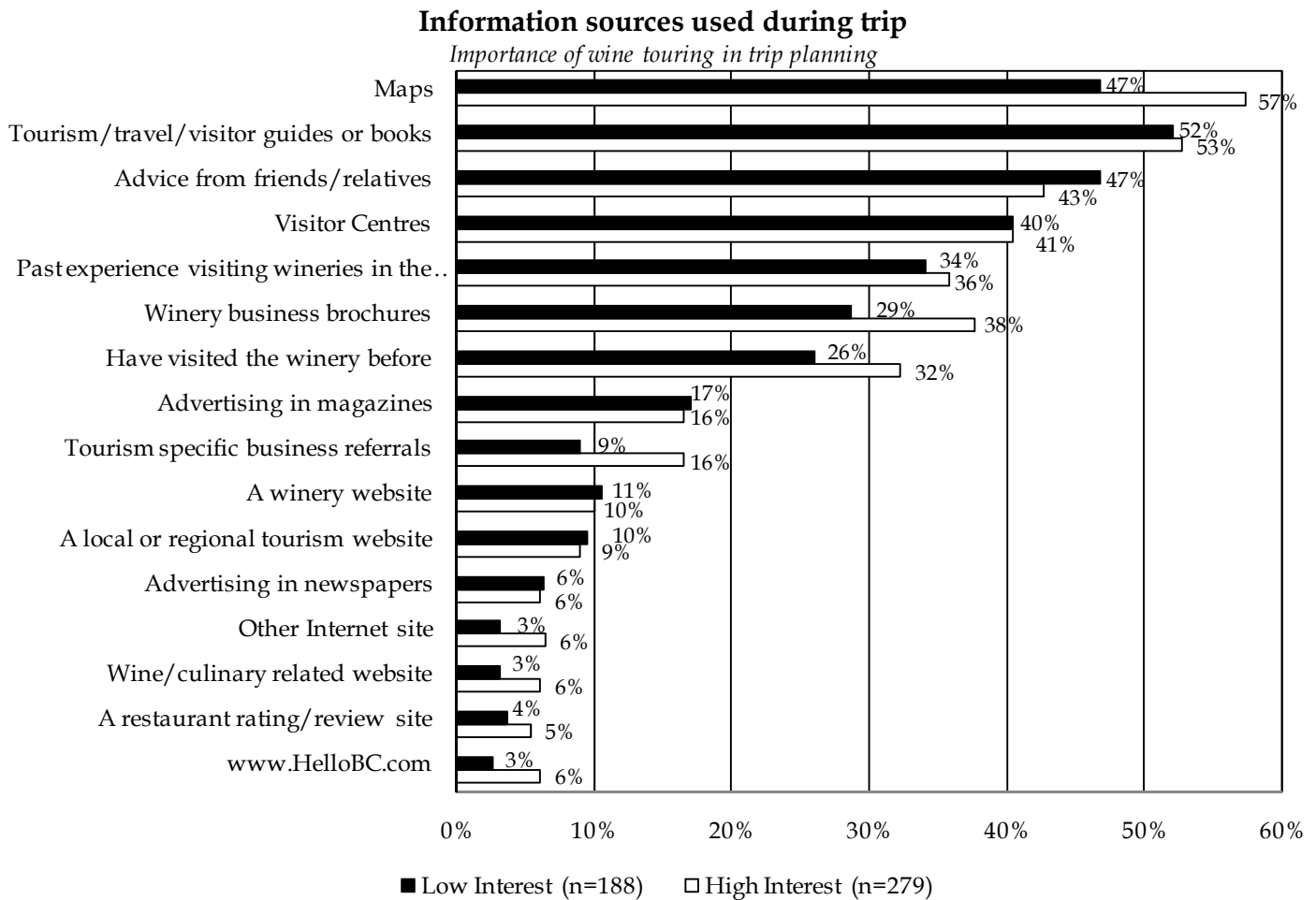


Figure 12. Information sources used during trip showing importance of wine touring for trip planning (low and high interest). Only those responses which received 5% or more of the total have been shown in the figure.

## Wine Touring

### *Planning the wine touring trip*

Exploring the detailed information on the importance of wine touring in trip planning reveals that wine touring was a primary reason for trip planning for just over one quarter (27%) of all independent leisure travellers and an important reason for a further 28%. Combined these two groups have been classified as high interest wine travellers. For the remainder of leisure travellers, wine touring either played some role in trip planning (30%) or was not important at all (15%). Combined these two groups are referred to in this report as low interest wine travellers. No practical differences were observed by origin for those indicating different levels of importance in wine touring to trip planning.



Table 26: Detailed information on importance of wine touring in trip planning by origin

	<b>Leisure Travellers (n=1,750)</b>	<b>BC (n=901)</b>	<b>Alberta (n=447)</b>	<b>Other Canada (n=232)</b>	<b>Outside Canada (n=170)</b>
Primary reason	27.0%	30.7%	22.4%	24.1%	23.5%
Important reason	27.9%	26.7%	29.8%	31.5%	24.7%
Played some role in planning	30.4%	28.7%	33.6%	30.6%	30.6%
Not important at all	14.6%	13.8%	14.3%	13.8%	21.2%

When asked specifically about the importance of the visiting the winery (where they were intercepted) in planning their trip to the Okanagan, the largest group of independent leisure travellers (28%) indicated that the winery was somewhat important. However, the second largest group (23%) mentioned that the winery was not important at all in trip planning. The percent that indicated that the winery was not important at all increased as the origin of the survey participant moved further away from British Columbia. For example, 19% of travellers from British Columbia indicated that they specific winery was not important at all, whereas 34% of those from outside Canada indicated the same. This was the only practical difference observed by origin.

Table 27: Importance of specific winery in trip planning by origin

	<b>Leisure Travellers (n=1,744)</b>	<b>BC (n=899)</b>	<b>Alberta (n=445)</b>	<b>Other Canada (n=230)</b>	<b>Outside Canada (n=170)</b>
Very important	20.5%	22.9%	19.6%	18.7%	12.9%
Important	18.4%	17.9%	20.0%	17.4%	18.2%
Somewhat important	27.9%	30.8%	26.5%	23.0%	22.9%
Not important	10.1%	9.7%	10.1%	10.4%	12.4%
Not at all important	23.0%	18.7%	23.8%	30.4%	33.5%

Examining the importance of the specific winery at which travellers were intercepted by high and low interest wine travellers revealed that the individual winery was a considerable influencing factor for trip planning for nearly half (49%) of high interest wine travellers. The same was true for less than a third (27%) of low interest wine travellers. Conversely, 43% of low interest wine travellers indicated that the specific winery was not important, while only one quarter (25%) of high interest wine travellers indicated that the winery they were visiting was not an important consideration for trip planning.

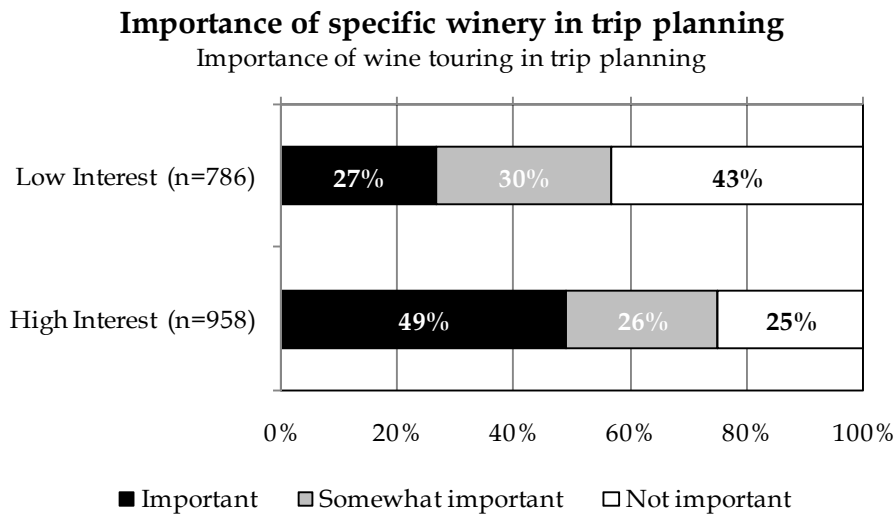


Figure 13. Importance of specific winery in planning trip to the Okanagan Valley showing importance of wine touring for trip planning (low and high interest).

Among all independent leisure travellers, just under half (45%) planned to stop at the winery at which they were intercepted prior to departure from home. The percentage who stated this was the case was highest among British Columbia residents at 51% and decreases to a low of 23% among residents from outside Canada.

Independent leisure travellers who indicated that wine touring was an important component of trip planning were considerably more likely to indicate that they had planned to visit the winery at which they were intercepted prior to departing from home. Over half (54%) of high interest wine travellers had planned a visit to the specific winery, compared to just over a third (35%) of low interest travellers who had made similar plans.

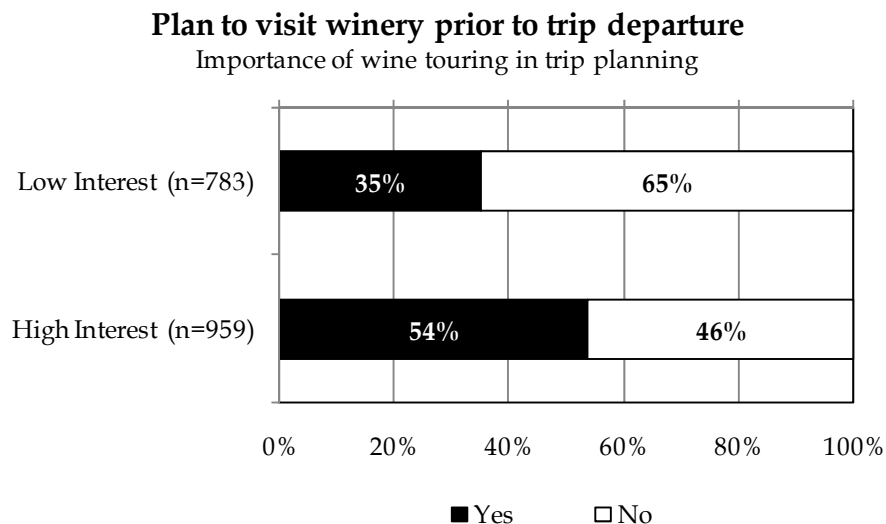


Figure 14. Plan to visit specific winery prior to departure from home showing importance of wine touring for trip planning (low and high interest).

The follow-up survey asked leisure travellers to identify the importance of visiting a food or cuisine business (not including wineries) as a factor motivating their trip to the Okanagan Valley. Over half (55%) of all participants indicated that this was not a factor at all, while a third (33%) indicated that this played some role. There were no practical differences observed by origin although those from Canadian provinces other than British Columbia and Alberta and those from outside of Canada were slightly more likely to state that food and cuisine played some role.

Table 28: Importance of visiting a food/cuisine business in motivating trip by origin

	Leisure Travellers (n=518)	BC (n=282)	Alberta (n=130)	Other Canada (n=72) <sup>1</sup>	Outside Canada (n=34) <sup>1</sup>
Primary reason	1.9%	2.5%	0.8%	1.4%	2.9%
Important reason	10.2%	11.0%	8.5%	9.7%	11.8%
Played some role in planning	33.2%	33.3%	30.0%	36.1%	38.2%
Not important at all	54.6%	53.2%	60.8%	52.8%	47.1%

1. Small sample sizes. Interpret with caution.

Although nearly half (47%) of high interest wine travellers stated that visiting a food or cuisine business was not a motivating factor for their trip to the Okanagan, this percentage was considerably lower than was found among low interest wine travellers who stated food and cuisine was not a factor (65%). Overall, 16% of high interest wine travellers and 7% of low interest wine travellers stated that food and cuisine was either a primary or an important motivating factor for their trip to the Okanagan Valley.

### Importance of food/cuisine in trip motivation

Importance of wine touring in trip planning

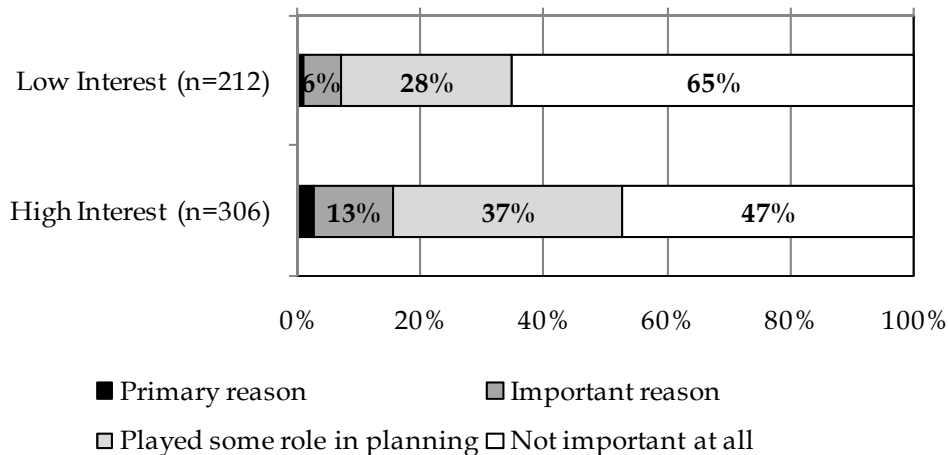


Figure 15. Importance of visiting a food/cuisine business (not including wineries) in motivating trip to the Okanagan Valley showing importance of wine touring for trip planning (low and high interest).

The follow-up survey also asked participants to identify if they had dined at a fine dining or gourmet establishment on their trip (either while in the Okanagan Valley or outside of the region). Nearly two-thirds of respondents (61%) indicated that they had dined at one of these establishments during their trip. These individuals were further asked to indicate whether they decided to visit these

establishments before or during their trip. The results showed that well over half (60%) of fine dining/gourmet patrons had made their dining decisions during their trip (rather than before leaving home). A further third (33%) of participants made decisions both while they were travelling and before their trip. Those from other Canadian provinces and those residing outside Canada were more likely to indicate that these decisions were made while travelling (70% and 65%, respectively).

Table 29: Timing of decision regarding dining at a fine dining or gourmet establishment by origin<sup>1,2</sup>

	Leisure Travellers (n=321)	BC (n=173)	Alberta (n=82)	Other Canada (n=43)	Outside Canada (n=23)
Only before the trip	7.8%	9.8%	6.1%	4.7%	4.3%
Only during the trip	59.5%	57.2%	57.3%	69.8%	65.2%
Both before and during the trip	32.7%	32.9%	36.6%	25.6%	30.4%

1. Only individuals who stated they participated in dining at a fine dining or gourmet establishment in the Okanagan Valley or at another location during their trip have been included.

2. Multi-responses were allowed, hence, totals do not equal 100%.

Differences were observed in the timing of the decision to visit a fine dining or gourmet establishment of high interest wine travellers compared low interest wine travellers. Those who stated that wine touring was of little or no importance in planning their trip were more likely to decide to visit a fine dining or gourmet establishment during their trip (70% vs. 54% of high interest wine travellers). Conversely, high interest wine travellers were more likely to state both that they made decisions to visit these establishments before leaving on their trip or both before and during the trip (10% and 37%, compared to 4% and 26% for low interest wine travellers).

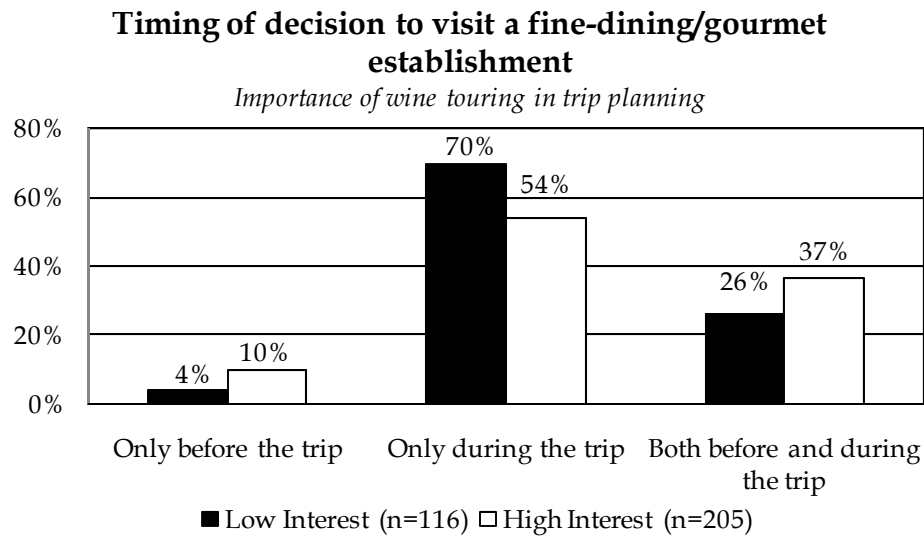


Figure 16. Timing of decision regarding dining at a fine dining or gourmet establishment showing importance of wine touring for trip planning (low and high interest). Only individuals who stated they participated in dining at a fine dining or gourmet establishment in the Okanagan Valley or at another location during their trip have been included.

Independent leisure travellers who indicated that wine touring was not the primary reason for taking this trip were asked to identify the other leisure activity that was the primary reason for planning this

trip. Nearly a third (28%) indicated that there was no specific leisure activity and that they were travelling primarily for the purposes of relaxing, for a getaway or simply to enjoy the sun. Of those who indicated a primary motivating activity, over one fifth (21%) mentioned a nature-based activity (including boating, hiking, camping, cycling, fishing, rock climbing, horseback riding, and wildlife viewing) and an additional 14% mentioned a lake-based activity such as: visiting the beach, swimming or participating in other water-based activities, such as waterskiing, tubing, and riding personal watercrafts. Golf was also a popular activity with 9% of all independent leisure travellers citing this as their primary leisure activity.

No practical differences were observed in primary leisure activity by origin. Travellers from outside Canada, however, were more likely to indicate a nature based activity (29%), especially compared to travellers from British Columbia and Alberta (21%, each). Among the specific nature-based activities cited the largest difference was seen in hiking with 11% more residents from outside of Canada participating in hiking compared to those from Alberta (13% and 2%, respectively). Lake activities were cited most often by residents of Alberta (17%) a full 11% above those from outside of Canada (6%). Golf was also selected more frequently among both residents of British Columbia and Alberta compared to those from other provinces and outside of Canada, whereas the reverse was true among those who selected touring and sightseeing as their primary leisure activity.

Table 30: Other primary leisure activities by origin

	<b>Leisure Travellers (n=1,252)</b>	<b>BC (n=612)</b>	<b>Alberta (n=339)</b>	<b>Other Canada (n=173)</b>	<b>Outside Canada (n=128)</b>
No specific leisure activity <sup>3</sup>	28.2%	27.8%	30.7%	28.9%	22.7%
All nature-based activities	21.4%	20.9%	20.6%	19.1%	28.9%
<i>Boating</i>	7.7%	7.2%	11.2%	3.5%	7.0%
<i>Hiking</i>	4.2%	3.4%	2.4%	4.6%	12.5%
<i>Camping</i>	3.6%	3.1%	3.8%	6.4%	1.6%
<i>Cycling</i>	3.1%	3.8%	2.1%	1.7%	4.7%
<i>Fishing</i> <sup>1</sup>	0.6%	0.8%	0.3%	1.2%	0.0%
<i>Other nature-based activities</i>	2.1%	2.6%	0.9%	1.7%	3.1%
Lake activities	14.3%	16.5%	17.1%	7.5%	5.5%
Golf	9.3%	10.3%	10.3%	6.9%	5.5%
Friends/Family activities	8.4%	8.2%	6.2%	11.0%	11.7%
Touring & sightseeing	6.3%	4.4%	3.8%	13.3%	12.5%
Sporting event	3.9%	4.2%	4.1%	2.3%	3.9%
Dining <sup>1</sup>	1.4%	1.8%	1.2%	1.7%	0.0%
Agriculture (Orchards & Fruit) <sup>1</sup>	1.0%	1.0%	0.6%	1.2%	2.3%
Festival or event <sup>1</sup>	1.0%	1.8%	0.6%	0.0%	0.0%
Cultural activities <sup>1</sup>	1.0%	0.8%	0.6%	1.2%	2.3%
Other <sup>2</sup>	3.7%	2.3%	4.1%	6.9%	4.7%

1. Small sample size (i.e. under 20 respondents) requires that results should be interpreted with caution.

2. Other includes real estate (n=12), shopping (n=6), spa (n=4), cruise (n=4), casino (n=4), go karts (n=3), playing bridge (n=2) 11 other responses.

3. No specific leisure activity includes both those who stated no specific activity & travellers who mentioned general activities including relaxing, for a getaway and to enjoy the sun (n=59).

During the intercept interview, independent leisure travellers were asked to identify the primary factor that prompted them to visit the specific winery where they were interviewed. Over a third of travellers (37%) indicated that they were visiting the winery based on a recommendation from others. These included those who received recommendations from friends, family and local residents (23%), local businesses (7%), and recommendations from others people (7%). Road signage and passing by prompted visits from one fifth (22%) of leisure travellers, while 12% indicated they were either familiar with the winery product or name and stopped by to investigate further.

There were some practical differences observed by origin whereby those from other Canadian provinces were more likely to state that they were prompted to visit the winery as a result of recommendations (51%), in particular the recommendations they received from friends, family members or local residents (34%). This was also true of residents from outside of Canada with nearly half (47%) of this group indicating they were prompted to visit by a recommendation. Additionally, the percentage who stated that they were passing by the establishment or took note of road signage that drew them in was highest among residents of British Columbia (27%) and gradually decreased to a low of 11% among residents from outside of Canada.

Table 31: Reason prompting visit to winery by origin

	Leisure Travellers (n=949)	BC (n=440)	Alberta (n=232)	Other Canada (n=149)	Outside Canada (n=128)
Recommendation (all)	36.8%	30.0%	34.9%	51.0%	46.9%
<i>Friend, family or resident</i>	22.9%	17.3%	23.3%	34.2%	28.1%
<i>Local business</i>	6.5%	6.4%	5.2%	6.7%	9.4%
<i>Not specified</i>	7.4%	6.4%	6.5%	10.1%	9.4%
Passing by or road signage	21.8%	26.6%	22.8%	15.4%	10.9%
Familiar with product or name	11.9%	11.8%	15.1%	8.1%	10.9%
Exploring (i.e. touring/previous interest)	5.7%	6.6%	5.2%	6.7%	2.3%
Convenient / Was in the area	4.3%	5.0%	5.2%	2.0%	3.1%
Information at cultural or visitor centre	4.0%	2.5%	3.0%	4.7%	10.2%
Advertisement or promotional activity	3.9%	3.6%	3.9%	3.4%	5.5%
Travel guide or map	3.3%	2.7%	2.6%	4.0%	5.5%
To visit amenities (i.e. restaurant, spa, shop, etc)	2.3%	3.4%	1.7%	2.0%	0.0%
Previous visit	2.1%	3.2%	1.3%	1.3%	0.8%
Setting (i.e. scenery or architecture) <sup>1</sup>	1.7%	1.8%	2.2%	0.0%	2.3%
Other	2.2%	2.7%	2.2%	1.3%	1.6%

1. Small sample size (i.e. under 20 respondents) requires that results should be interpreted with caution.

There were very few differences observed in the reasons provided for visiting the winery by high and low interest wine travellers. Those classified as low interest wine travellers were, however, more likely to indicate that they were visiting the winery as a result of a recommendation received from friends, family or local residents (26% compared to 19% for high interest wine travellers).

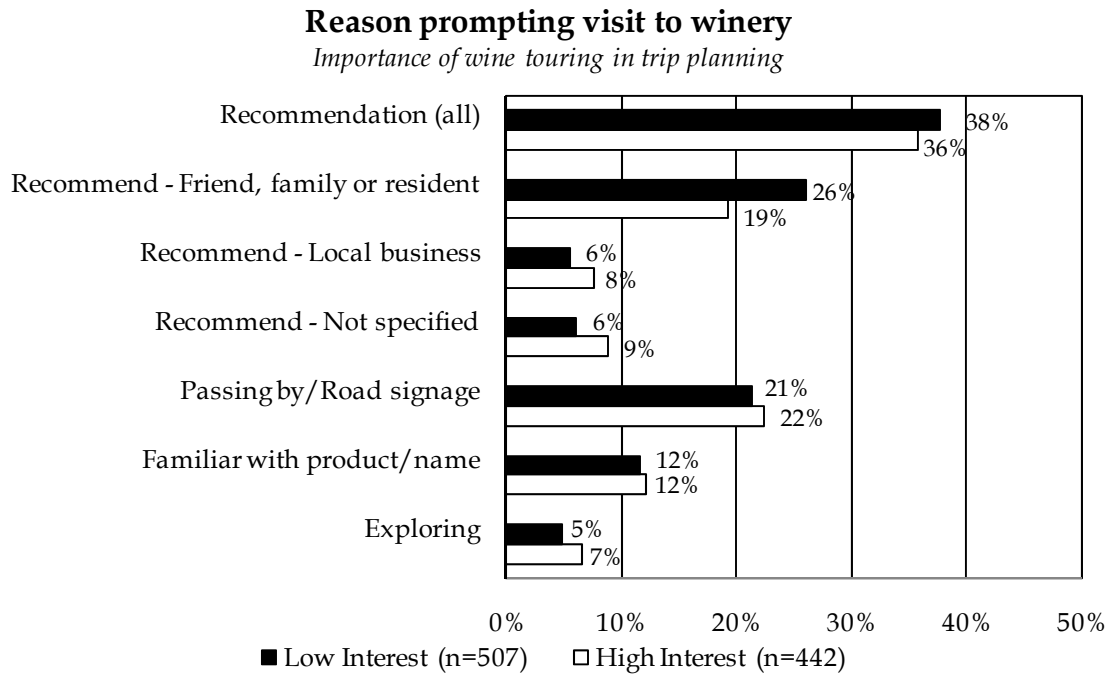


Figure 17. Reason prompting visit to winery showing importance of wine touring in trip planning (low and high interest).

### *Characteristics of wine touring trip*

During the interview at the winery, independent leisure travellers were asked to indicate which from a selection of leisure activities they either had already or planned to participate in during their trip. Of this list, two-thirds of respondents (66%) planned to go fine dining and nearly as many (64%) mentioned that they had either visited or planned to visit a farmer's market during their trip. Visits to museums of historical sites and hiking were cited by a third (34% and 33%, respectively). Golfing, cycling and visiting a spa were less likely to be participated in on their leisure trip (20%, 16%, and 11%, respectively).

The only practical difference observed in leisure activities was for hiking. Residents from outside of Canada were considerably more likely to have mentioned that they either had participated or planned to go hiking during their trip. Nearly half (45%) of these travellers indicated that hiking would be an activity on their trip, compared to less than a third of British Columbia residents (29%). Similar patterns were also seen in the origin of visitors to museums and historical sites. While the trips of 44% of those from outside Canada and other Canadian provinces included these activities, only 28% of British Columbia residents and 36% of those from Alberta planned to or had participated.

Table 32: Other activities planned or participated in by origin

	Leisure Travellers (n=1,748)	BC (n=900)	Alberta (n=447)	Other Canada (n=231)	Outside Canada (n=170)
Fine dining	66.4%	63.4%	71.1%	69.3%	65.9%
Visit a farmer's market	63.6%	63.2%	67.1%	62.8%	57.1%
Visit a museum or historical site	33.8%	28.3%	36.0%	43.7%	43.5%
Hiking	33.2%	29.0%	33.1%	41.1%	44.7%
Golf	20.3%	19.1%	25.1%	17.7%	17.6%
Cycling	16.4%	17.7%	13.2%	15.6%	19.4%
Visit a spa	11.3%	11.6%	12.1%	9.5%	10.6%

High interest and low interest wine travellers were very similar in terms of the other activities they had either included or planned to include as part of their trip with one noteworthy exception. Among those travellers for whom wine touring was an important component of trip planning, fine dining was included significantly more often (72% compared to 59% for low interest wine travellers).

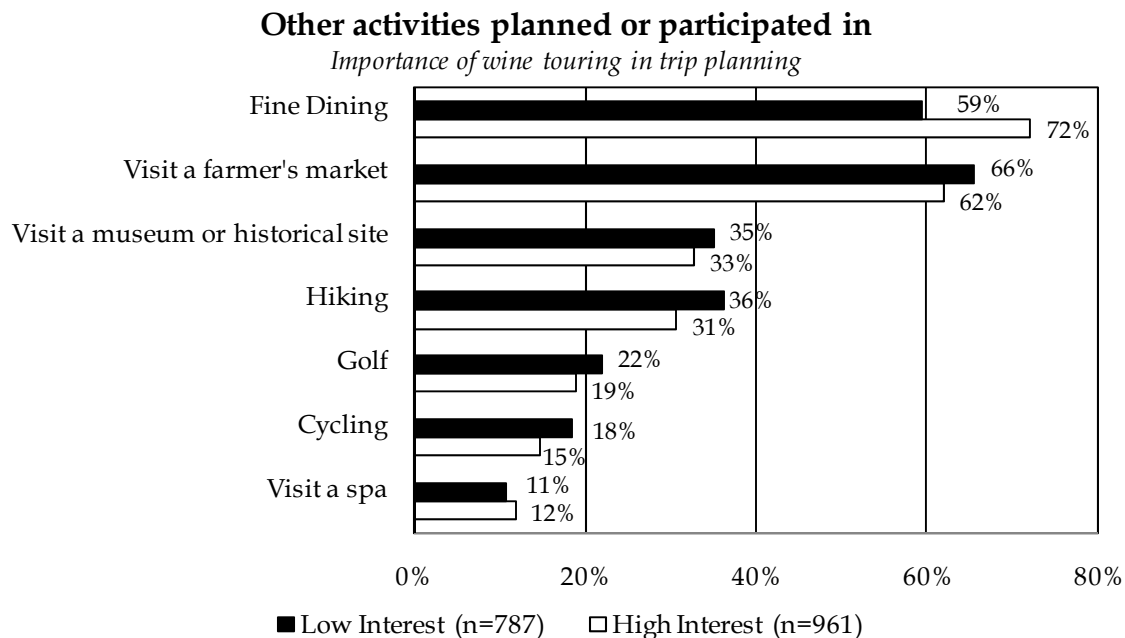


Figure 18. Other activities planned or participated in showing importance of wine touring in trip planning (low and high interest).

Participants in the follow-up survey were asked to identify, from a list of possible wine and culinary activities, which activities either they or a member of their travel party participated in while in the Okanagan Valley. Over two thirds (68%) of all independent leisure travellers indicated that a visit to a farmers' market or fruit stand was incorporated in their itinerary while in the Okanagan Valley. This was followed by 64% who stated that they drove a wine trail and 59% who participated in fine dining or a gourmet restaurant. Over half of all leisure travellers (53%) also mentioned they experienced



local or regional cuisine while in the Okanagan Valley. There were few practical differences observed by origin of the participant. Visitors from outside of Canada were, however, considerably less likely to visit a farmers' market or fruit stand. This activity was included as part of the itinerary of just over a third (36%) of visitors from outside Canada, compared to three quarters of visitors from Alberta and other Canadian provinces excluding British Columbia (76% and 74%, respectively). Residents from outside of Canada were also considerably less likely to visit a specialty food producer (26%), especially compared to residents of Alberta among whom nearly half (45%) participated in this activity.

Table 33: Participation in wine and culinary activities while in the Okanagan by origin<sup>1</sup>

	<b>Leisure Travellers (n=505)</b>	<b>BC (n=280)</b>	<b>Alberta (n=124)</b>	<b>Other Canada (n=70)</b>	<b>Outside Canada (n=31)</b>
Visited farmers' markets or fruit stands	68.1%	66.8%	75.8%	74.3%	35.5%
Drove a wine trail	64.4%	60.7%	72.6%	67.1%	58.1%
Fine dining/gourmet restaurant	59.2%	59.6%	61.3%	50.0%	67.7%
Experienced local or regional cuisine	53.1%	50.4%	57.3%	57.1%	51.6%
Visited a farm(s) or Orchard(s)	40.2%	35.0%	46.8%	50.0%	38.7%
Visited a specialty food producer(s)	37.8%	35.4%	45.2%	40.0%	25.8%
Special event at a winery	12.1%	10.7%	14.5%	15.7%	6.5%
Food or drink festival, fair or exhibition	11.9%	12.9%	10.5%	12.9%	6.5%
Wine tasting school or course	8.7%	6.1%	15.3%	8.6%	6.5%
Stayed at an Inn/Resort with a gourmet restaurant	8.7%	6.4%	15.3%	7.1%	6.5%
Cooking school or course	0.8%	1.1%	0.8%	0.0%	0.0%

1. Included are all independent leisure travellers who indicated participation in at least one wine and/or culinary activity listed while in the Okanagan Valley. Individuals who did not select a minimum of one activity have been removed from this analysis.

There were more practical differences observed between high and low interest wine travellers in terms of the wine and culinary activities participated in while travelling in the Okanagan Valley. While the percentage of high and low interest wine travellers who visited a farmers' market or fruit stand was virtually identical (68% of high interest and 69% of low interest), considerably more high interest travellers drove a wine trail (68%), dined at a fine dining or a gourmet restaurant (65%), or experienced local or regional cuisine (57%) compared to low interest wine travellers (58%, 50%, and 46%, respectively). Indeed, high interest wine travellers were more likely to have participated in each of the wine and culinary activities presented (with the exception of taking part in a cooking school or course, in which only a very small number of respondents participated) compared to low interest wine travellers.

### Participation in wine and culinary activities while in the Okanagan Valley

*Importance of wine touring in trip planning*

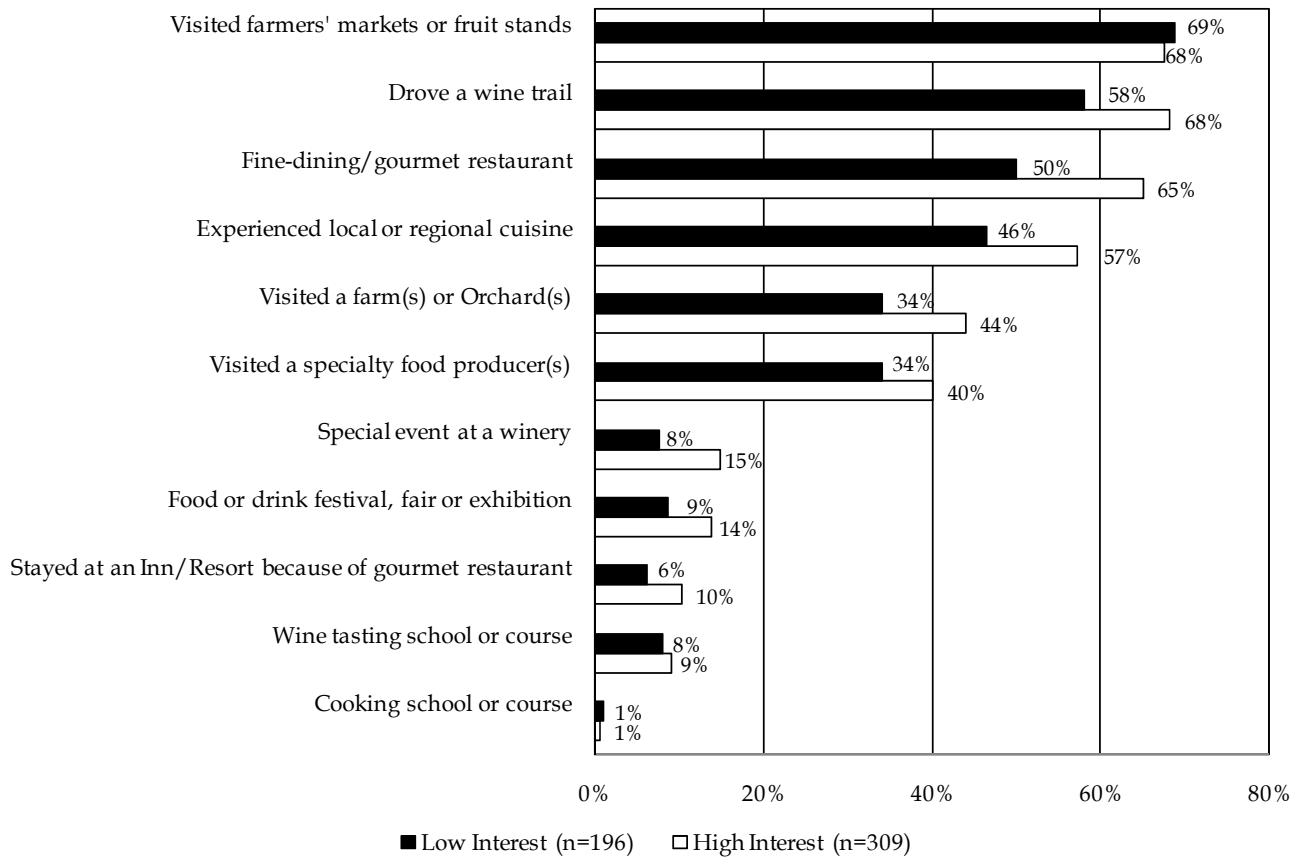


Figure 19. Participation in wine and culinary activities by respondent or member of travel party while in the Okanagan Valley showing importance of wine touring in trip planning (low and high interest).

Among independent leisure travellers, nearly two thirds (64%) mentioned that they had stopped at a farmers' market or fruit stand outside of the Okanagan Valley. This is only slightly lower than the percentage who reported participating in this activity while in the Okanagan Valley. Over half (51%) also mentioned that they participated in fine dining or dined at a gourmet restaurant, while just under half (47%) experienced local or regional cuisine. Again these numbers were slightly lower than those seen above where participants were asked to identify wine and culinary activities in which they participated while in the Okanagan Valley. A much larger difference was seen in the percentage of travellers who drove a wine trail outside of the Okanagan Valley. A total of 45% participated in this activity outside of the Okanagan, while 64% participated while in the Okanagan Valley.

Travellers from outside of Canada were less likely to indicate that they had visited a farmers' market or fruit stand outside of the Okanagan Valley (52%), especially compared to residents of Alberta where 69% of travellers from this origin participated. Those from outside Canada were also less likely to have experienced local or regional cuisine (36%) and to have driven a wine trail (27%). Visitors from Canadian provinces other than British Columbia and Alberta were more likely to have experienced local or regional cuisine (60%) while travelling outside of the Okanagan Valley. While there were slightly lower levels of participation in wine/culinary related activities while outside of

the Okanagan Valley, it is noteworthy that there was still a sizeable proportion of travellers engaging in wine/culinary activities outside of the valley while on other parts of their trip.

Table 34: Participation in wine and culinary activities while on trip outside the Okanagan by origin<sup>1</sup>

	Leisure Travellers (n=368)	BC (n=196)	Alberta (n=86)	Other Canada (n=53)	Outside Canada (n=33)
Visited farmers' markets or fruit stands	63.6%	63.8%	68.6%	62.3%	51.5%
Fine dining/gourmet restaurant	50.5%	49.5%	48.8%	54.7%	54.5%
Experienced local or regional cuisine	47.3%	42.3%	54.7%	60.4%	36.4%
Drove a wine trail	45.4%	49.5%	45.3%	41.5%	27.3%
Visited a farm(s) or Orchard(s)	34.5%	33.2%	37.2%	37.7%	30.3%
Visited a specialty food producer(s)	33.7%	32.7%	40.7%	26.4%	33.3%
Food or drink festival, fair or exhibition	9.5%	8.2%	10.5%	9.4%	15.2%
Stayed at an Inn/Resort with gourmet restaurant	7.6%	6.1%	12.8%	5.7%	6.1%
Special event at a winery	6.3%	5.1%	9.3%	9.4%	0.0%
Wine tasting school or course	6.0%	4.1%	9.3%	9.4%	3.0%
Cooking school or course <sup>2</sup>	1.1%	1.0%	1.2%	1.9%	0.0%

1. Included are all independent leisure travellers who indicated participation in at least one wine and/or culinary activity listed while in the Okanagan Valley. Individuals who did not select a minimum of one activity have been removed from this analysis.

2. Small sample size (i.e. under 20 respondents) requires that results should be interpreted with caution.

Generally, there were far fewer differences between high and low interest wine travellers in terms of the wine and culinary activities participated in while travelling outside of the Okanagan Valley. While high interest wine travellers were more likely to take part in each wine and culinary activity listed (with the exception of visiting farmers' markets and fruit stands), none of these differences were found to be practically significant. The largest difference was seen in terms of those who visited a farm or orchard outside of the Okanagan Valley. This activity was included on the itineraries of 38% of high interest wine travellers, compared to only 29% of low interest travellers.

### Participation in wine and culinary activities while outside the Okanagan Valley

*Importance of wine touring in trip planning*

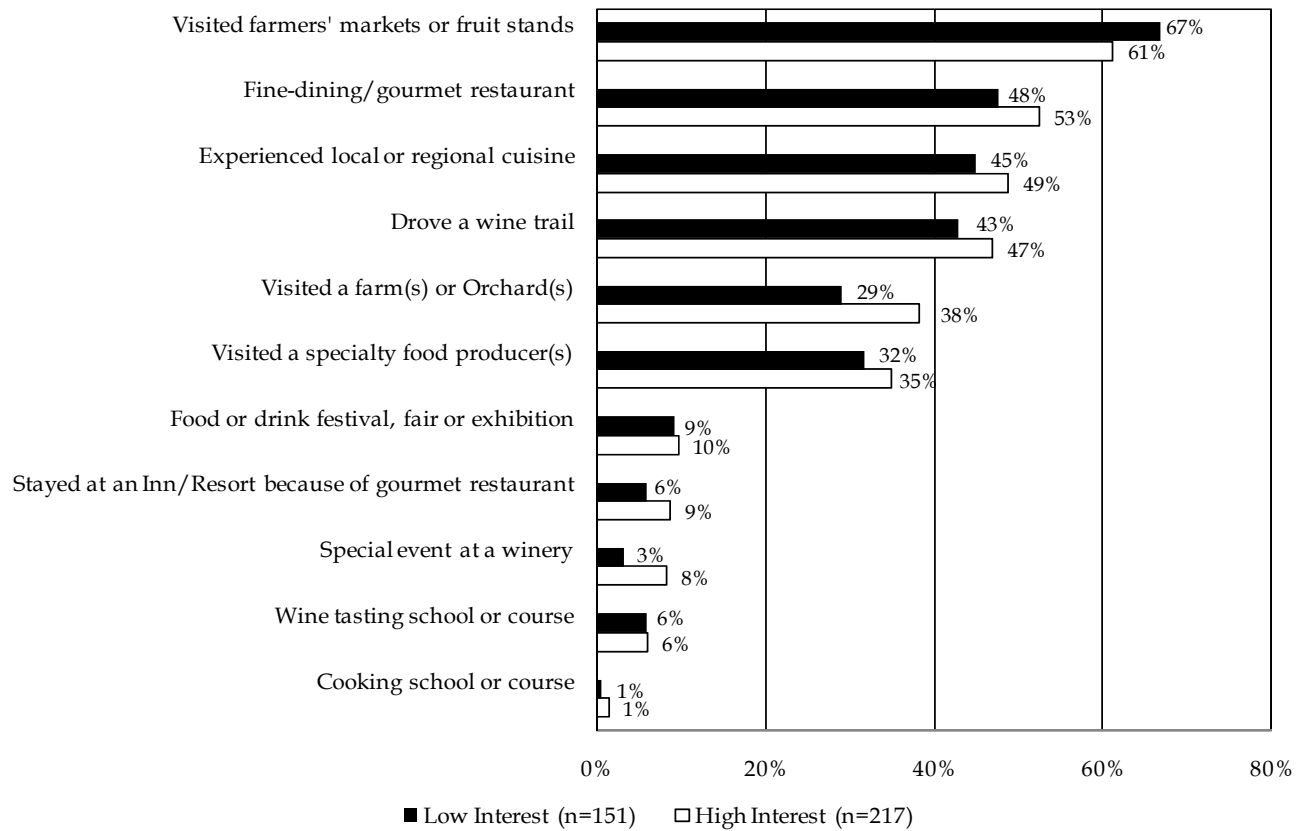


Figure 20. Participation in wine and culinary activities by respondent or member of travel party while outside the Okanagan Valley showing importance of wine touring in trip planning (low and high interest).

On the follow-up survey independent leisure travellers were asked to provide detail about the actual activities they participated in while travelling in the Okanagan Valley. Of the activities listed, the activity selected most often was shopping for local arts and crafts. This activity was mentioned by over half (54%) of all independent leisure travellers. Participating in swimming and beach activities and visiting parks were also frequently selected activities with 43% and 42% of travellers indicating these activities were included on their trip, respectively.

There were several practical differences observed when the responses are examined according to the origin of the traveller. Participants from other Canadian provinces were more likely to include shopping for local arts and crafts as part of their trip with two thirds (66%) selecting this activity. This group of participants were also less likely to indicate that their trip involved participation in swimming and beach activities. Less than a third of residents from other Canadian provinces mentioned these activities compared to nearly half (48%) of residents from British Columbia. Travellers from Alberta were most likely to indicate they had participated in golfing with over a third (34%) mentioning this activity compared to 17% of those from outside of Canada. Residents of other countries were, however, nearly twice as likely to include wildlife viewing when travelling with 31% participating compared to 18% of all independent leisure travellers and 16% of those from British Columbia.

Table 35: Participation in trip activities while in the Okanagan Valley by origin

	<b>Leisure Travellers (n=465)</b>	<b>BC (n=255)</b>	<b>Alberta (n=117)</b>	<b>Other Canada (n=64)</b>	<b>Outside Canada (n=29)</b>
Shopping for local arts and crafts	54.4%	51.4%	53.8%	65.6%	58.6%
Participating in swimming/beach activities	43.4%	48.2%	41.9%	29.7%	37.9%
Visiting parks <sup>1</sup>	41.7%	43.9%	34.2%	43.8%	48.3%
Visiting museum, heritage or historic site	29.9%	29.8%	23.9%	31.3%	51.7%
Participating in hiking	26.7%	23.9%	31.6%	31.3%	20.7%
Participating in golfing	22.4%	18.4%	34.2%	18.8%	17.2%
Visiting First Nations attraction or event	21.3%	22.4%	18.8%	23.4%	17.2%
Participating in wildlife viewing	17.6%	16.1%	17.9%	17.2%	31.0%
Participating in boating/sailing	13.3%	12.2%	15.4%	14.1%	13.8%
Visiting casino	12.0%	12.2%	13.7%	9.4%	10.3%
Visiting family attraction <sup>2</sup>	12.0%	12.9%	16.2%	6.3%	0.0%
Attending a festival, fair or exhibition	11.6%	11.4%	12.0%	12.5%	13.8%
Participating in cycling	11.4%	14.5%	10.3%	4.7%	3.4%
Attending or participating in a sporting event <sup>3</sup>	8.8%	7.5%	12.0%	9.4%	6.9%
Visiting spa	7.7%	8.2%	9.4%	4.7%	3.4%
Participating in mountain biking	7.3%	8.2%	6.0%	3.1%	13.8%
Participating in kayaking/canoeing <sup>4</sup>	3.9%	5.1%	3.4%	1.6%	0.0%
Participating in fishing <sup>4</sup>	3.2%	3.5%	2.6%	1.6%	6.9%
Participating in rock climbing <sup>4</sup>	0.9%	1.2%	0.9%	0.0%	0.0%
Other activities participated <sup>6</sup>	8.2%	9.0%	7.7%	4.7%	10.3%

1. Includes municipal, provincial or national parks, or natural areas outside parks and camping.

2. Includes activities such as mini golf, zoos, and waterslides.

3. Does not include golf.

4. Small sample size (i.e. under 20 respondents) requires that results should be interpreted with caution.

5. 'Other' activities included shopping (n=6), sightseeing (n=6), visiting friends or family (n=4), real estate (n=3), horseback riding (n=2), hot springs (n=2), movie (n=2), pet related (n=2), sporting activity (n=2), trail - no specific activity (n=2), & 7 unique responses.

Overall, travellers for whom wine touring was of low importance and those for whom wine touring was an important factor in trip planning were similar in terms of the other general activities they participated in while travelling. Those classified as low interest wine travellers, however, were more likely to include activities that centred upon lakes and beaches on their trip. While over half (51%) of low interest wine travellers participated in swimming and beach activities, only 39% of high interest wine travellers stated they participated in these same activities. Similarly, 18% of low interest wine travellers participated in sailing or boating compared to only 10% of high interest travellers. High interest wine travellers were only slightly more likely to participate in shopping for local arts and crafts, visiting parks, hiking, and spas. None of these differences, however, were determined to be

significant for practical purposes.

### Participation in trip activities while in the Okanagan Valley

*Importance of wine touring in trip planning*

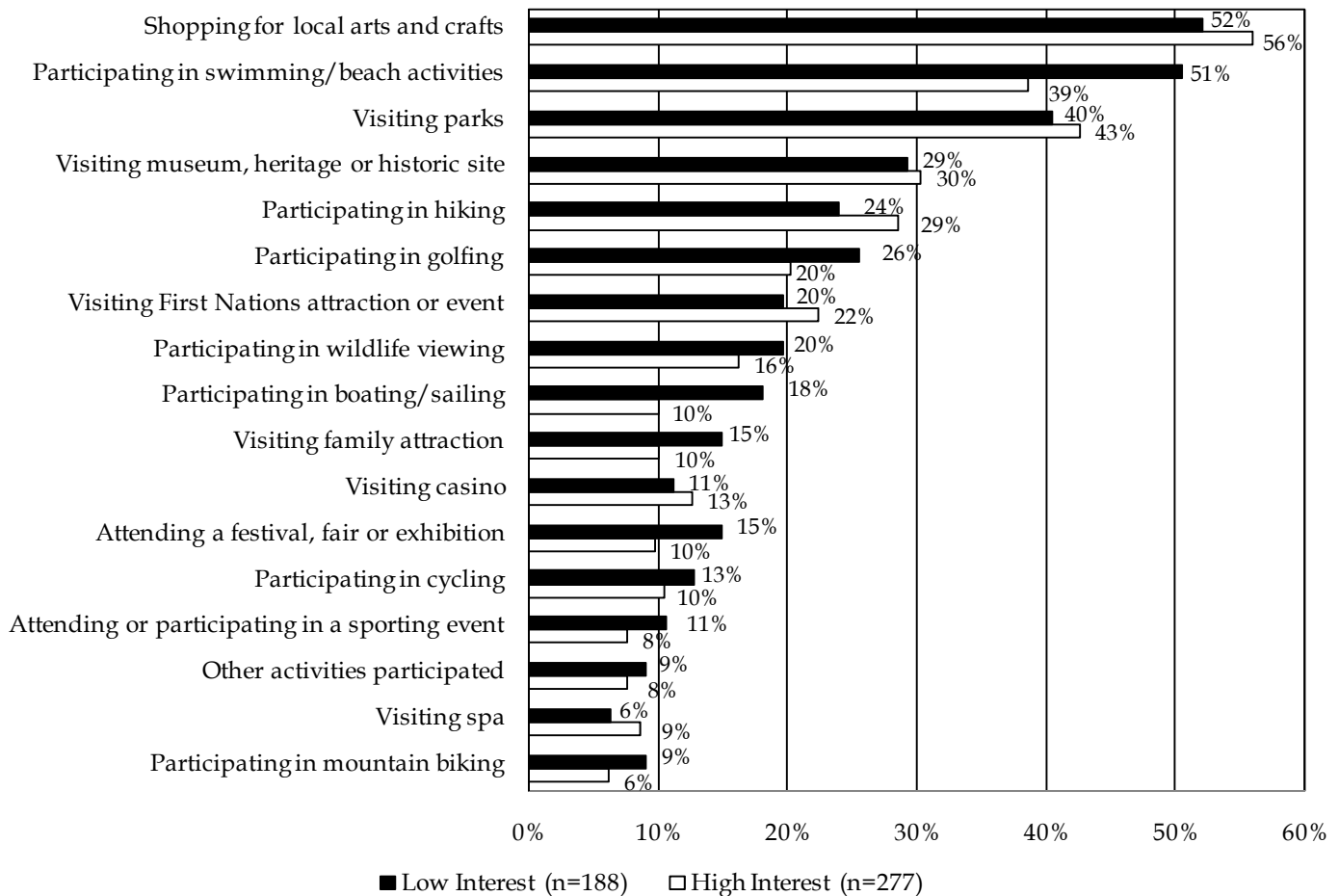


Figure 21. Activities participated in by respondent and/or members of travel party while in the Okanagan Valley showing importance of wine touring in trip planning (low and high interest). Only those responses which received 5% or more of the total have been shown in the figure.

Participants in the follow-up survey were asked to specify which of these same activities they included on their trip in an area outside of the Okanagan Valley. There were only minor variations seen in the frequency and activities participated in by independent leisure travellers in other areas. Shopping was once again cited as the most frequent activity with over half (55%) indicating they had shopped for local arts and crafts during their trip. Visiting parks was also selected by over half (54%) of all leisure travellers which represented a 12% increase compared to the percentage of travellers who cited they took part in this activity in the Okanagan Valley. Conversely, the percent of travellers who indicated they participated in swimming and beach activities in another region during their trip decreased to 37% compared to 43% who participated in this activity in the Okanagan Valley.

There were a number of practical differences observed, in particular among travellers from Canadian provinces other than British Columbia and Alberta and Outside Canada. Travellers from both of these origins were considerably more likely to indicate they had visited a park outside of the Okanagan Valley during their trip. A total of 82% of residents of other countries and 73% of residents from other

Canadian provinces visited parks in other regions, compared to 44% of Alberta residents and 48% of those from British Columbia. Only one quarter (25%) of those from outside Canada participated in swimming and beach activities compared to 42% from British Columbia. Travellers from other Canadian provinces and outside Canada were also more likely to visit a museum, heritage or historic site outside of the Okanagan Valley with this activity drawing nearly two thirds (61%) of those from outside Canada and half (45%) of travellers from Alberta.

Table 36: Participation in trip activities outside of the Okanagan Valley by origin

	Leisure Travellers (n=353)	BC (n=178)	Alberta (n=91)	Other Canada (n=56)	Outside Canada (n=28)
Shopping for local arts and crafts	55.0%	50.0%	56.0%	64.3%	64.3%
Visiting parks <sup>1</sup>	53.5%	47.8%	44.0%	73.2%	82.1%
Participating in swimming/beach activities	36.8%	42.1%	33.0%	32.1%	25.0%
Visiting museum, heritage or historic site	33.1%	26.4%	30.8%	44.6%	60.7%
Participating in hiking	28.9%	22.5%	31.9%	41.1%	35.7%
Participating in wildlife viewing	27.2%	21.3%	25.3%	33.9%	57.1%
Participating in golfing	15.9%	12.9%	26.4%	12.5%	7.1%
Visiting First Nations attraction or event	15.6%	16.3%	11.0%	17.9%	21.4%
Attending a festival, fair or exhibition	14.4%	11.2%	13.2%	19.6%	28.6%
Visiting family attraction <sup>2</sup>	12.2%	11.2%	18.7%	5.4%	10.7%
Visiting casino	11.9%	11.2%	14.3%	10.7%	10.7%
Participating in cycling	10.5%	10.1%	11.0%	10.7%	10.7%
Participating in boating/sailing	9.1%	6.7%	12.1%	8.9%	14.3%
Visiting spa	7.9%	3.9%	8.8%	17.9%	10.7%
Participating in kayaking/canoeing	7.1%	7.9%	5.5%	5.4%	10.7%
Attending or participating in a sporting event <sup>3,4</sup>	5.4%	6.2%	5.5%	5.4%	0.0%
Participating in mountain biking <sup>4</sup>	5.1%	6.2%	3.3%	5.4%	3.6%
Participating in fishing <sup>4</sup>	4.0%	3.4%	4.4%	1.8%	10.7%
Participating in rock climbing <sup>4</sup>	0.8%	0.6%	0.0%	3.6%	0.0%
Other activities participated in the region <sup>5</sup>	7.9%	8.4%	6.6%	7.1%	10.7%

1. Includes municipal, provincial or national parks, or natural areas outside parks and camping.

2. Includes activities such as mini golf, zoos, and waterslides.

3. Does not include golf.

4. Small sample size (i.e. under 20 respondents) requires that results should be interpreted with caution.

5. 'Other' activities included hot springs (n=5), sightseeing (n=5), skiing (n=3), visiting friends or family (n=3), horseback riding (n=2), shopping (n=2), not specified (n=2), and 5 additional unique responses.

In terms of the activities participated in by high and low interest wine travellers while outside of the Okanagan, there were a few notable differences. High interest wine travellers were more likely to shop for local arts and crafts (59% compared to 50% of low interest travellers), visit parks (57% compared to 49%), and make a visit to a museum or site of historic importance (38% compared to 27% of low interest wine travellers).

## Participation in trip activities outside of the Okanagan Valley

*Importance of wine touring in trip planning*

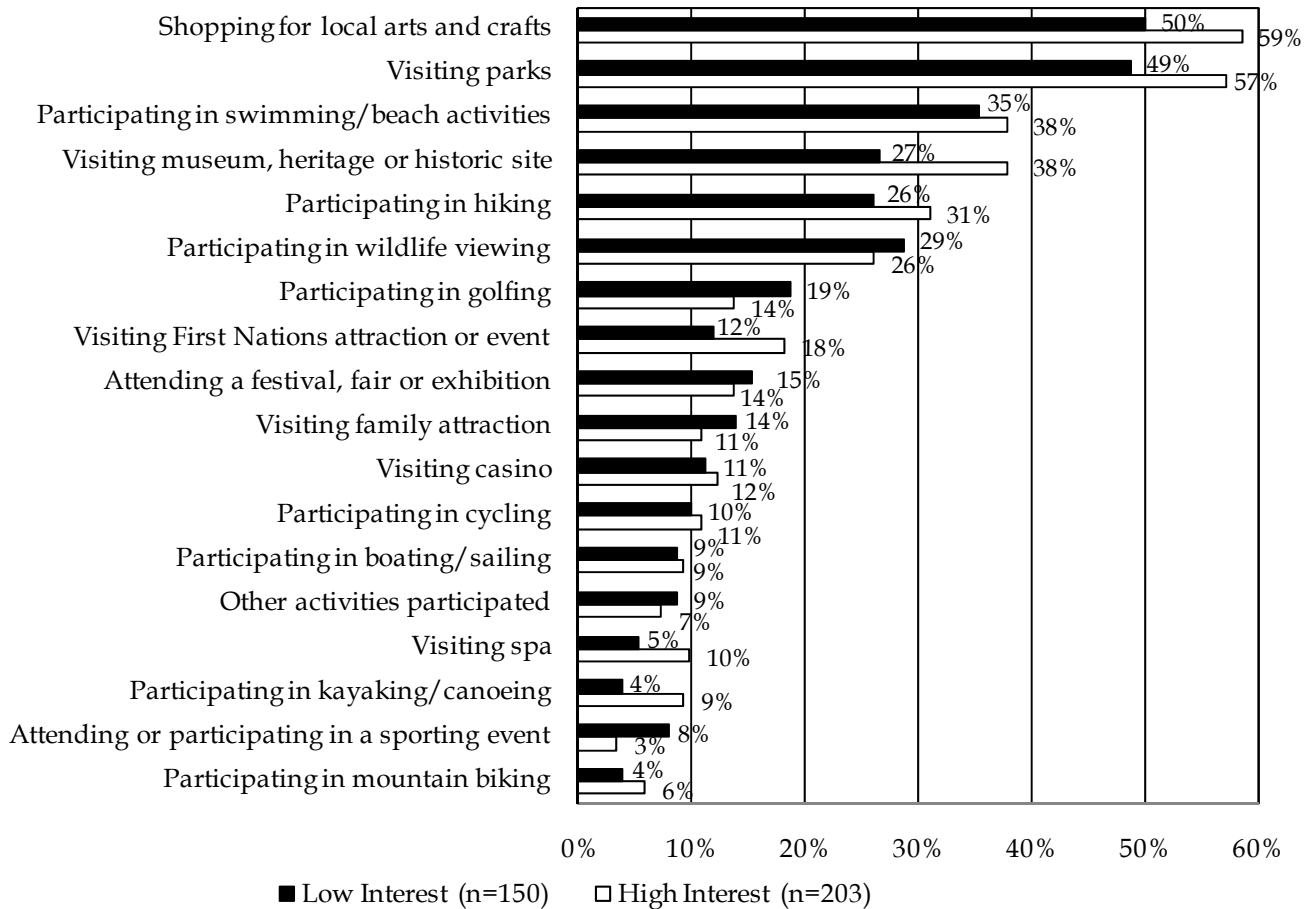


Figure 22. Activities participated in by respondent and/or members of travel party while outside of the Okanagan Valley showing importance of wine touring in trip planning (low and high interest). Only those responses which received 5% or more of the total have been shown in the figure.

Independent leisure travellers were asked to identify how many wineries they visited or planned to visit on the day they were interviewed, in the Okanagan Valley, and in total on their trip. Overall, travellers reported an average of 3.5 wineries for the day, 7.1 wineries in the Okanagan Valley, and 8.8 wineries on the trip. When asked about the number of wineries independent leisure travellers planned to visit on the day they were interviewed, the largest group (41%) indicated that there were between three and five wineries on their itineraries for the day. Nearly one quarter indicated that the winery they were interviewed at would be the only one, however 17% planned on visiting between six and ten while an additional 16% were planning to stop at two. When asked about the number of wineries they had visited or planned to visit in the Okanagan Valley, over one quarter (28%) mentioned three to five while the same amount (28%) mentioned between six and ten. In terms of their entire trips, the number of wineries visited or planned to visit did not change significantly from the number reported for the Okanagan Valley with nearly a third (30%) indicating between six and 10 and 26% stating that they visited or planned to visit between three and five.



Table 36: Number of wineries and/or wine tasting rooms visited or planned to visit on current day, in Okanagan Valley and total for the trip

	Today (n=1,742)	In Okanagan Valley (n=1,733)	On Trip (n=1,735)
One	24.0%	13.4%	8.6%
Two	16.3%	11.9%	7.7%
3 to 5	41.0%	27.5%	25.8%
6 to 10	17.1%	27.5%	29.8%
11 to 15	1.3%	10.6%	14.4%
16 to 20	0.2%	5.4%	7.6%
21 to 25	0.0%	1.6%	2.2%
More than 25	0.0%	2.2%	3.9%

Looking at the number of wineries visited or planned by origin showed that those from British Columbia reported the highest average number of wineries visited for the day (3.8). The median number of wineries visited both in the Okanagan Valley (6.0) and on the trip in total (7.0) was notably higher compared to all leisure travellers. Visitors from outside Canada reported the lowest number of wineries visited across all questions.

Table 37: Average and median number of wineries and/or wine tasting rooms visited or planned to visit on current day, in Okanagan Valley and total for the trip by origin

	Leisure Travellers (n=1,742) <sup>1</sup>		BC (n=896)		Alberta (n=447)		Other Canada (n=230)		Outside Canada (n=169)	
	Avg.	Median	Avg.	Median	Avg.	Median	Avg.	Median	Avg.	Median
Today	3.5	3.0	3.8	3.0	3.4	3.0	3.2	3.0	3.0	2.0
Okanagan Valley	7.1	5.0	7.7	6.0	7.2	5.0	6.2	5.0	5.2	3.0
On trip	8.8	6.0	8.9	7.0	9.5	6.0	8.4	6.0	7.4	5.0

1. The number of respondents (n) is based on total valid responses to the question regarding total wineries visited on current day.

Considerable differences were observed in the number of wineries visited by high and low interest wine travellers. High interest wine travellers reported that they visited more wineries per day (average of 4.3 compared to 2.7 for low interest travellers), in the Okanagan (average 9.4 compared to 4.3 for low interest), and on the trip in total (11.7 compared to 5.3 for low interest wine travellers).

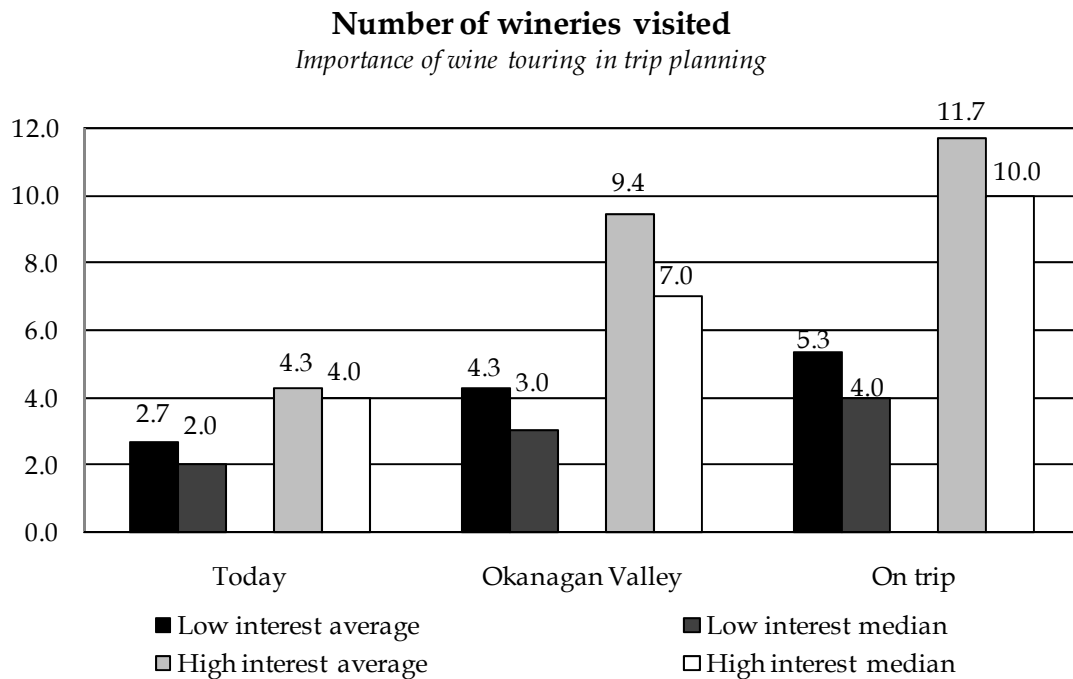


Figure 23. Average and median number of wineries visited by independent leisure travellers on the day of the interview, in the Okanagan Valley and on trip in total showing importance of wine touring in trip planning (low and high interest).

All independent leisure travellers were asked if this was their first visit to the specific winery at which they were interviewed. For two thirds (69%) this was their first visit. This number was slightly lower for residents of British Columbia and Alberta (63% and 66%, respectively), however, it was markedly higher among residents of other Canadian provinces and those from outside of Canada (83% and 89%, respectively).

Travellers were also asked to indicate whether they had ever tasted the wines produced at this winery before. Just over half of all leisure travellers (55%) indicated they had tasted the wines; however, there were variations by origin. Residents of British Columbia were most likely to state that they had previously tasted the wine (63%), whereas those from Canadian provinces other than British Columbia and Alberta and those from outside of Canada were considerably less likely to have previously tasted the wine (43% and 32%, respectively).

Table 38: Experience with specific wine/winery by origin

	Leisure Travellers (n=1,741) <sup>1</sup>	BC (n=897)	Alberta (n=447)	Other Canada (n=229)	Outside Canada (n=168)
First time at winery	68.9%	62.7%	66.4%	83.4%	88.7%
Tasted wine before	55.3%	62.5%	55.9%	43.0%	31.5%

1. The number of valid responses reported in this table (n) was based on the number of responses to the question, "Is this your first time visiting <specific winery>?" For the question, "Have you ever tasted the wines produced here before?" valid percentages are based on the following sample sizes - all leisure travellers n=1,739; BC n=896; Alberta n=447; other Canada n=228; and outside Canada n=168.

High interest wine travellers were less likely to report that this was their first time visiting the winery (65% compared to 73% of low interest travellers); however this difference was not determined to be of practical significance. Interestingly, when asked if they had ever tasted the wines produced at the winery before the results were very similar for high interest and low interest wine travellers. High interest travellers were only slightly more likely to have tasted the wine at 59% compared to 51% of low interest travellers.

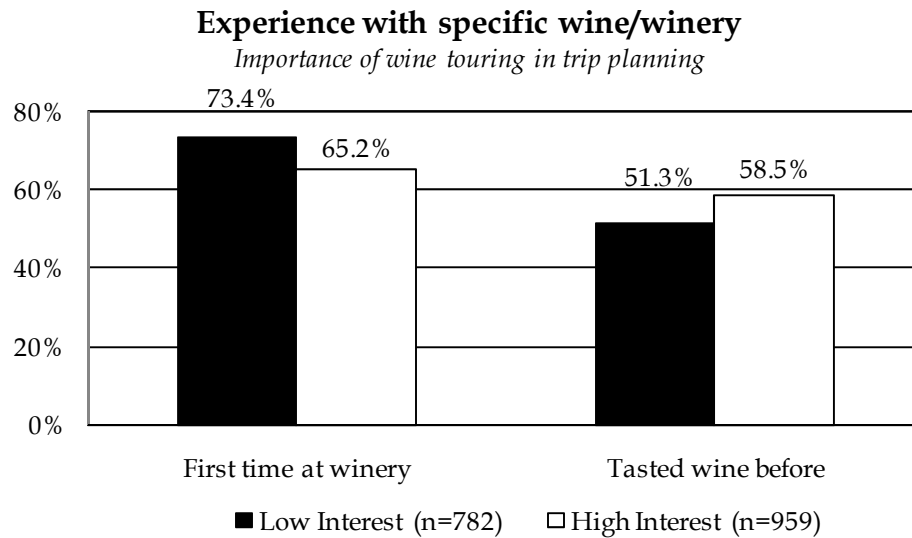


Figure 24. Responses to the questions, “Is this your first time visiting the winery?” and “Have you ever tasted the wines produced here before?” showing importance of wine touring in trip planning (low and high interest).

Among all independent leisure travellers the vast majority (85%) participated in a wine tasting and nearly three quarters (71%) purchased wine. The percentages participating in other activities in the winery were considerably lower with less than one quarter participating in either a self or guided tour of the facilities (23%) or purchasing other merchandise (24%). Only 14% indicated that they ate at the restaurant on site. There were very few differences by origin. Those from outside Canada were not only considerably less likely to purchase the wine (54%), but they were also slightly less likely to purchase any other merchandise (20%). The purchase of other merchandise was highest among travellers from other Canadian provinces (32%).

Table 39: Other activities participated in at the winery by origin

	Leisure Travellers (n=1,743)	BC (n=898)	Alberta (n=447)	Other Canada (n=229)	Outside Canada (n=169)
Taste wine	84.9%	85.2%	84.3%	86.9%	82.2%
Buy wine	71.3%	73.3%	74.7%	69.4%	54.4%
Take a self/ guided tour	22.6%	19.6%	25.3%	27.1%	25.4%
Buy other merchandise	23.8%	20.9%	27.1%	31.9%	19.5%
Eat at a restaurant	14.4%	14.1%	14.1%	15.3%	15.4%

Once again, interestingly, there were no practical differences observed in terms of the different activities included in the visits of high and low interest wine travellers. Although high interest wine travellers were more likely to taste wine, purchase wine, purchase other merchandise and eat at the winery restaurants, the percentage who did so was only slightly higher than among those for whom wine touring was of limited or no importance to their trip. For example, although nearly three quarters (74%) of high interest wine travellers purchased wine, nearly as many (68%) low interest wine travellers also made wine purchases.

### Other activities participated in at the winery

Importance of wine touring in trip planning

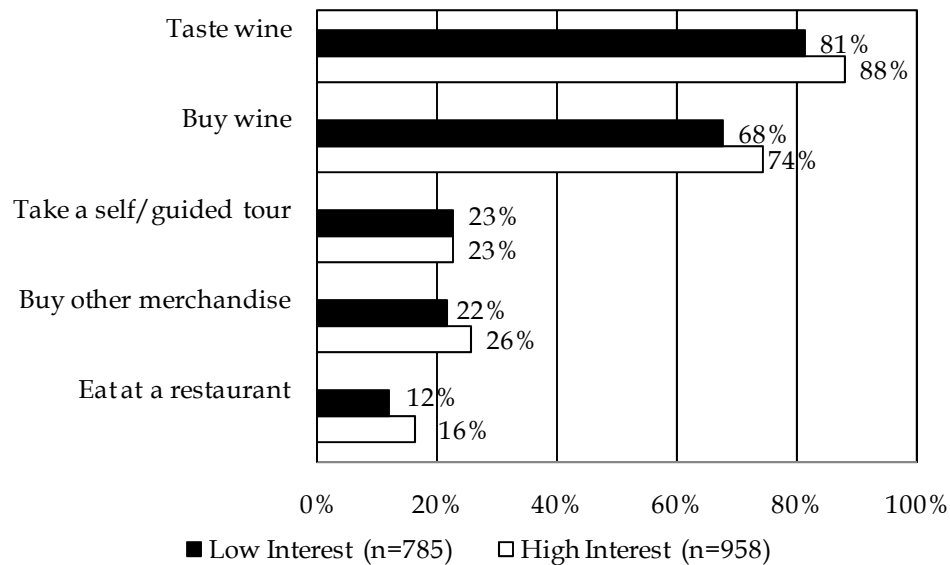


Figure 25. Which of the activities listed did you include in your visit to the winery showing importance of wine touring in trip planning (low and high interest).

Participants in the follow-up survey were asked to indicate their level of interest in attending a number of different activities that could take place at a winery in the Okanagan Valley. The activities mentioned included the outdoor screening of a movie, a live concert, a food and wine pairing seminar, and a food and wine pairing dinner. Additionally, participants were able to write in an additional activity that they would be interested in attending. Overall, the highest percentage of leisure travellers mentioned they were either very or somewhat interested in a food or wine pairing dinner. This item was appealing to 85% of all leisure travellers who responded. Over three quarters

were also interested in a live concert (80%) and a food and wine pairing seminar (77%). The lowest level of interest was for an outdoor movie screening, which was of interest to just under half (48%) of all leisure travellers.

Other events mentioned by survey participants included courses and seminars in wine, culinary arts, and other areas (n=12), other arts and cultural activities including art shows, theatre, music and other activities (n=11), other outdoor activities including golf, hiking, cycling and other activities (n=10), touring activities (n=6), and other (n=3). There were only small differences in levels of interest in these activities by origin. Travellers from outside Canada indicated the lowest levels of interest in live concert events (67% compared to 83% of travellers from British Columbia) and food and wine pairing seminars (65% compared to 83% of residents from other Canadian provinces).

Table 40: Percentage of travellers who indicated they were either very or somewhat interested in attending the following activities at a winery in the Okanagan Valley by origin

	Leisure Travellers (n=493) <sup>1</sup>	BC (n=273)	Alberta (n=121)	Other Canada (n=69)	Outside Canada (n=33)
Outdoor screening of a movie	47.9%	50.6%	44.9%	46.4%	38.5%
Live concert	79.6%	82.5%	78.5%	76.7%	66.7%
Food & wine pairing seminar	77.1%	76.0%	79.3%	83.1%	64.5%
Food & wine pairing dinner	85.2%	85.3%	87.4%	84.1%	78.1%

1. Sample sizes shown are based on the highest number of valid response reported across all items presented. Individual sample sizes for each item reported vary slightly.

High and low interest wine travellers were virtually identical in terms of their interest in attending other activities at wineries in the Okanagan Valley. High interest wine travellers did, however, show a higher level of interest compared to low interest travellers in each of the activities listed. The greatest difference was seen in the level of interest for food and wine pairing seminars. A total of 80% of high interest wine travellers were either very or somewhat interested in this activity, compared to 72% of low interest wine travellers.

### Interest in other activities at Okanagan Valley wineries

Importance of wine touring in trip planning

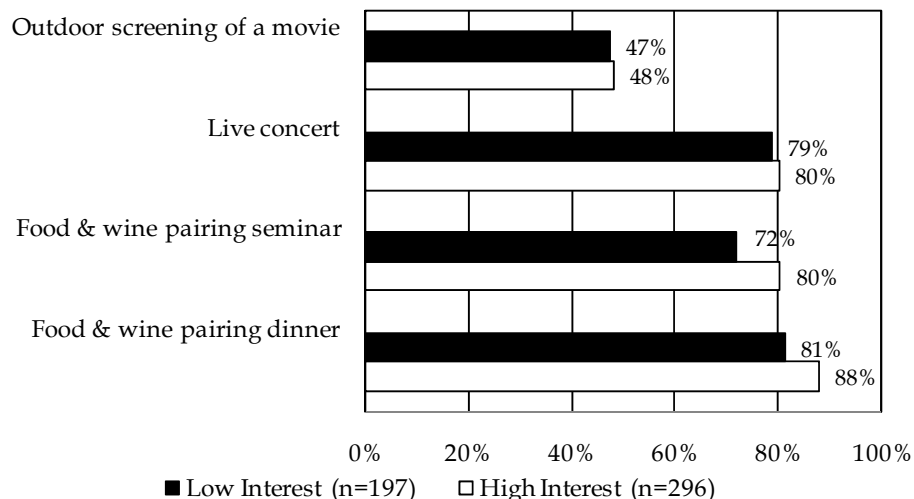


Figure 26. Percentage of travellers who indicated they were either very or somewhat interested in attending each activity at a winery in the Okanagan Valley showing importance of wine touring in trip planning (low and high interest).

Over three quarters (79%) of all independent leisure travellers indicated that they had participated in wine touring prior to this trip. Of those repeat wine tourists, they were asked what other wine destinations they had visited before. Among leisure travellers who stated that they had participated in wine touring in the past, the nearly half (44%) indicated they had previously visited a winery in somewhere in Canada. Of those who stated they had previously visited a winery in Canada, over three quarters (78%) specifically mentioned a wine region in British Columbia. Within British Columbia, over half (58% or 20% of the total sample of repeat wine touring participants) mentioned a winery in the Vancouver Island and Gulf Island region with 45% (15% of all repeat wine touring participants) having visited a winery in the Fraser Valley. A third had visited a winery in the US, with the vast majority (85% or 28% of all repeat wine touring participants) having visited a winery in California. Nearly a third (29%) also mentioned that they had visited a winery outside of either Canada or the United States.

There were marked practical differences in the percentage of repeat wine touring participants who mentioned visiting wineries in different regions by markets of origin. BC resident repeat, wine touring participants were considerably more likely to have visited a winery in the province, especially compared to those from other Canadian provinces and outside of Canada (49% compared to 13% and 11%, respectively). This difference carries into the differences observed in terms of the wine regions visited throughout Canada. A third (33%) of visitors from other Canadian provinces had visited a winery in Ontario compared to only 14% from British Columbia and 5% from outside of Canada. Repeat wine touring participants from Alberta and those from other Canadian provinces were also considerably less likely to have visited a winery in the United States, whereas those from outside Canada were more likely to have visited an international wine region, in particular, in another part of Europe.

Table 41: Other winery regions visited by repeat wine touring participants by origin

	Leisure Travellers (n=1,536)	BC (n=846)	Alberta (n=341)	Other Canada (n=182)	Outside Canada (n=167)
<b>British Columbia</b>	<b>34.1%</b>	<b>48.7%</b>	<b>20.5%</b>	<b>12.6%</b>	<b>11.4%</b>
Other Thompson Okanagan	2.1%	2.2%	2.9%	1.1%	1.2%
Vancouver Island	19.9%	28.1%	12.3%	8.2%	6.0%
Fraser Valley	15.2%	24.2%	4.4%	4.4%	3.6%
Other BC	3.2%	4.0%	3.2%	1.1%	1.2%
<b>Canada</b>	<b>43.6%</b>	<b>53.9%</b>	<b>33.1%</b>	<b>41.2%</b>	<b>15.0%</b>
British Columbia	34.1%	48.7%	20.5%	12.6%	11.4%
Ontario	15.9%	13.9%	17.0%	33.0%	4.8%
Other Canada	3.1%	2.0%	5.9%	5.5%	0.0%
<b>United States</b>	<b>32.6%</b>	<b>38.5%</b>	<b>20.5%</b>	<b>21.4%</b>	<b>39.5%</b>
California	27.7%	33.7%	17.9%	17.0%	28.7%
Oregon	4.6%	5.7%	1.2%	2.7%	7.8%
Washington	6.5%	7.3%	1.8%	2.7%	16.2%
Other US	4.9%	3.5%	2.6%	7.1%	13.8%
<b>International</b>	<b>29.4%</b>	<b>30.6%</b>	<b>21.1%</b>	<b>28.0%</b>	<b>41.9%</b>
Italy	9.6%	8.6%	6.2%	14.8%	15.6%
France	15.0%	15.1%	9.4%	18.7%	22.2%
Other Europe	12.2%	12.1%	7.0%	13.2%	22.8%
Australia / New Zealand	9.1%	9.1%	7.0%	5.5%	17.4%
Other International	4.5%	4.7%	2.9%	0.5%	10.8%

Also, as previously discussion, 76% of low interest wine travellers and 82% of high interest wine travellers indicated that they were repeat wine touring travellers. There was a practically significant difference between high interest and low interest wine travellers in terms of the percentage of repeat wine touring participants who stated they had previously visited a winery in all regions with the exception of international wine regions.

Over a third (38%) of high interest wine travellers compared to just over one quarter (27%) of low interest travellers had participated in a wine tour within the province in the past. The largest differences were seen among those who had visited wineries on Vancouver Island and the Gulf Islands (21% of high interest compared to 16% of low interest wine travellers) and those who had travelled to a winery in the Fraser Valley (19% of high interest compared to 11% of low interest wine travellers).

These differences remained consistent among those who stated they had visited a wine region in all of Canada (including British Columbia) with half (50%) high interest and a third (33%) of low interest wine travellers mentioning a wine region in Canada. Within Canada, 19% of high interest and 12% of low interest wine travellers indicated they had visited a wine region in Ontario.

Nearly one quarter (24%) of low interest wine travellers and well over a third (37%) of high interest wine travellers stated that they had previously visited a winery in the United States. Those who

visited a winery in California made up the bulk of visitors with 20% of low interest and 31% of high interest travellers stating they had visited this state to participate in wine touring.

The differences in the percentage of low interest compared to high interest wine travellers who visited international wine regions was not as pronounced. A third (33%) of high interest and one quarter (25%) of low interest wine travellers mentioned wineries in other countries with those who had visited wineries in France (18% high interest, 12% low interest), Italy (11% high interest, 8% low interest), other Europe (13% high interest, 12% low interest), and Australia/New Zealand (10% high interest and 8% low interest) representing the vast majority of all global wine regions visited.

### Wine regions visited by repeat wine touring participants

*Importance of wine touring in trip planning*

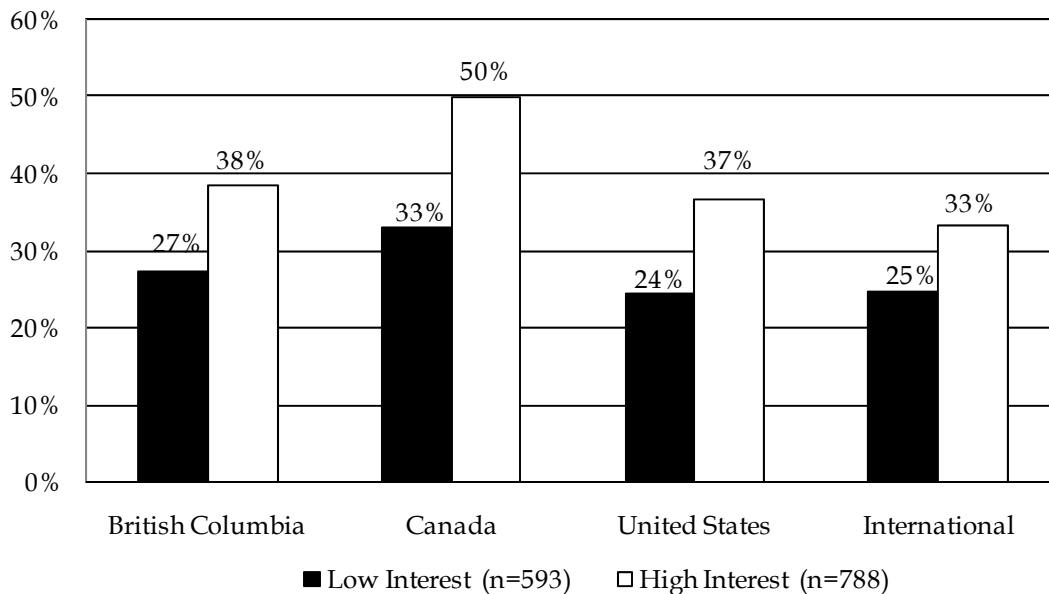


Figure 27. All wine regions visited by repeat wine touring participants showing importance of wine touring in trip planning (low and high interest).

On the follow-up survey, leisure travellers were asked to indicate how many bottles of wine they had purchased and brought home with them from the Okanagan Valley and the percent of the total trip expenditures that were related to wine purchases that were not consumed during the trip. On average, travellers indicated they purchased 21 bottles. It should be noted that nearly one tenth (9%) indicated they purchased 50 or more bottles (over 4 cases), which has an influence on this reported average. Among all leisure travellers the median number of bottles purchased was 10 with the largest group (40%) indicating that they purchased nine or fewer bottles and nearly one quarter (23%) purchasing between 10 and 19 bottles. Leisure travellers indicated that on average wine purchases accounted for 20% of their total trip expenditures (median of 15%).

There were some practical differences in the volume of wine purchased by origin with those from Canadian provinces and outside Canada more likely to purchase fewer bottles. It is expected that this is related to logistical challenges and restrictions on transporting alcohol while travelling. Well over half of both those from other Canadian provinces and those from outside Canada (60% and 62%, respectively) reported purchasing between one and nine bottles. Among British Columbia and



Alberta residents approximately a third (36% and 33%, respectively) purchased between one and nine bottles. The opposite was seen at the upper end of the scale with only 4% of residents from other Canadian provinces and 6% of those from outside Canada purchasing 30 or more bottles. Among British Columbia and Alberta residents, approximately one quarter (22% and 27%, respectively) purchased and brought home 30 or more bottles of wine.

Given the findings above, it is not surprising to find practical differences in the percent of total trip expenditures allocated to wine purchases by origin. Travellers from British Columbia reported that, on average, wine purchased accounted for nearly one quarter (23%, median 20%) of their total trip expenditures. Travellers from other Canadian provinces and those from outside Canada reported that wine purchased accounted for a lower percentage of their total trip expenditures. On average, residents of other Canadian provinces and those from outside Canada reported that wine purchases represented 12% of their total trip expenditures (median of 10% and 5%, respectively).

Table 42: Bottles of wine purchased in the Okanagan Valley and taken home by origin

	Leisure Travellers (n=530)	BC (n=289)	Alberta (n=135)	Other Canada (n=72)	Outside Canada (n=34)
None	5.3%	4.5%	6.7%	4.2%	8.8%
1 to 9	40.0%	35.6%	33.3%	59.7%	61.8%
10 to 19	23.0%	26.3%	19.3%	18.1%	20.6%
20 to 29	11.9%	11.4%	14.1%	13.9%	2.9%
30 or more	19.8%	22.1%	26.7%	4.2%	5.9%
Average bottles purchased	20.7	23.8	22.9	10.2	8.2
Median bottles purchased	10.0	12.0	14.0	6.0	6.0
Average percent spent on wine	20.2%	23.3%	19.9%	12.3%	11.8%
Median percent of total expenditures spent on wine	15.0%	20.0%	15.0%	10.0%	5.0%

There were considerable practical differences observed in terms of the number of bottles of wine purchased and taken home by high interest compared to low interest wine travellers. As expected, those for whom wine touring played an important role in trip planning were much more likely to purchase more bottles of wine. While 11% of low interest travellers did not purchase any bottles of wine, only 1% of high interest travellers reported the same. Well over half (55%) of low interest wine travellers purchased between one and nine bottles, while 30% of high interest wine travellers indicated the same number of purchases. Conversely, nearly a third (30%) of high interest wine travellers purchased 30 or more bottles to take home with them following their trip. The same could be said for only 5% of low interest wine travellers. Among high interest wine travellers the average number of bottles purchased was 27 (median of 16), whereas among low interest wine travellers the average was 11 (median of 6). High interest wine travellers reported that an average of 24% of their trip expenditures were spent on wine purchases (median of 20%), while for low interest travellers the average percent of total expenditures on wine was only 14% (median of 10%).

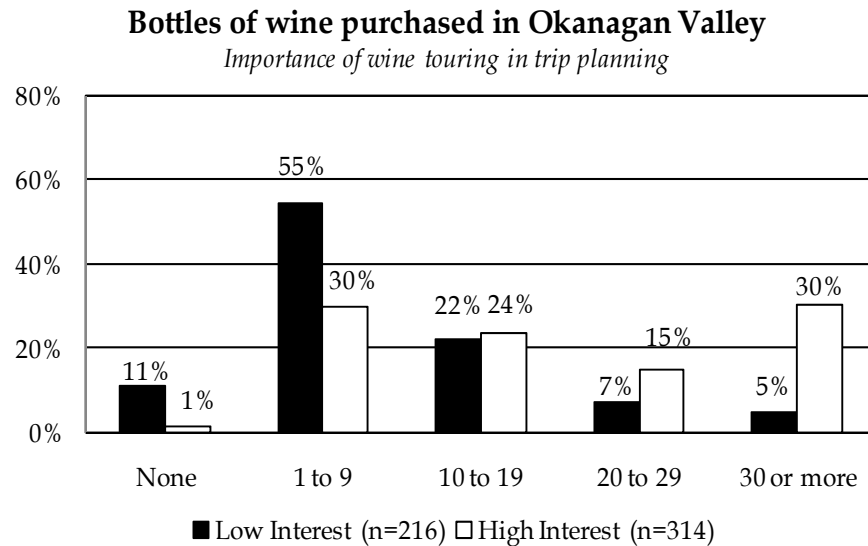


Figure 28. Bottles of wine purchased in Okanagan Valley and taken home showing importance of wine touring in trip planning (low and high interest).

### ***Characteristics of Wine Touring Destination***

The follow-up survey asked independent leisure travellers to identify up to three unique characteristics that make the Okanagan Valley different from other wine vacation destinations. More than half (54%) of travellers who provided unique characteristics found that the Okanagan Valley was unique as a result of its beautiful scenery or unique geography. Over a third (38%) mentioned the climate in terms of the sunny dry weather typical of the Okanagan Valley summer, while 28% mentioned that the Okanagan was accessible by it being either close to family, friends or home or the location meant that it was enroute in their travels.

Exploring the characteristics provided by those from different origins revealed that those who had travelled from further away (Canadian provinces other than British Columbia and Alberta and those from outside Canada) were more likely to mention the scenery and geography and less likely to indicate that the region was easily accessible from home, friends and family. Those from outside Canada were also more likely to mention the quality and selection of wine available (33% compared to 20% of all leisure travellers).

Table 43: Characteristics of the Okanagan Valley as a wine destination by origin

	Leisure Travellers (n=447)	BC (n=249)	Alberta (n=110)	Other Canada (n=58)	Outside Canada (n=30)
Beautiful scenery / unique geography	53.5%	51.4%	45.5%	69.0%	70.0%
Climate	38.3%	37.3%	40.9%	39.7%	33.3%
Accessible / Close to family, friends or home	27.7%	30.1%	33.6%	15.5%	10.0%
Wine - Quality / selection	19.9%	18.9%	18.2%	20.7%	33.3%
Atmosphere / people	19.2%	19.3%	20.9%	15.5%	20.0%
Wineries - Quality / selection	17.7%	18.9%	17.3%	15.5%	13.3%
Other activities <sup>1</sup>	17.2%	16.5%	19.1%	15.5%	20.0%
Proximity of wineries / convenient	16.1%	18.5%	17.3%	6.9%	10.0%
Local (BC or Canada) <sup>2</sup>	7.2%	6.4%	10.0%	8.6%	0.0%
Other wine/agriculture activities <sup>3</sup>	6.7%	6.4%	7.3%	8.6%	3.3%
Dining and cuisine	6.5%	7.2%	4.5%	3.4%	13.3%
Value	5.6%	5.6%	7.3%	5.2%	0.0%
Uncrowded/not over developed/small producers	5.1%	5.6%	3.6%	5.2%	6.7%
Other <sup>4</sup>	8.9%	10.4%	5.5%	8.6%	10.0%

1. Other activities includes a variety of activities not directly related to either wine or agriculture, including golf, swimming, cycling, hiking, casinos, aboriginal activities, arts and crafts, horseback riding, shopping, etc.

2. Local (BC or Canada) refers to those whose comments identified that they felt the Okanagan Valley was unique because it was in British Columbia or Canada and did not require travellers to travel far, cross borders or travel to locations with different languages, currency or regulations.

3. Other wine/agricultural activities includes a variety of activities directly related to either wine touring or agricultural offerings of the Okanagan Valley such as orchards, farms, markets, tasting tours, festivals and wine routes.

4. Other includes cultural aspects of the trip (n=15), general comments about wine or wineries (n=13), accommodation (n=7) and additional individual responses (n=16).

For the most part, low and high interest wine travellers were very similar in terms of the characteristics they listed to describe the Okanagan Valley as a unique wine vacation destination. Those who indicated that wine was of lower importance in trip planning were more likely to mention the scenery and unique geography of the region (59% compared to 50% of high interest wine travellers). Perhaps not surprisingly, however, those who indicated that wine played a more important role in trip planning were more likely to indicate that the wine quality or selection was a characteristic defining the Okanagan Valley as a wine vacation destination (25% compared to 11% of low interest wine travellers). High interest wine travellers were also more likely to mention the proximity of the wineries to one another and the convenience in being able to visit several wineries by travelling only a short distance (20% compared to 10% of low interest wine travellers) and to indicate the atmosphere was a unique characteristic of the Okanagan Valley (22% compared to 15% of low interest travellers).

These comments included those who indicated that the people they met while travelling were friendly and helpful, and those who appreciated the casual, peaceful, laidback atmosphere of the region. The percentage of high and low interest wine travellers who specifically mentioned either the

quality or selection of wineries in the Okanagan Valley was nearly even with 19% of high interest and 16% of low interest wine travellers citing this.

### Characteristics of the Okanagan Valley as a wine destination

*Importance of wine touring in trip planning*

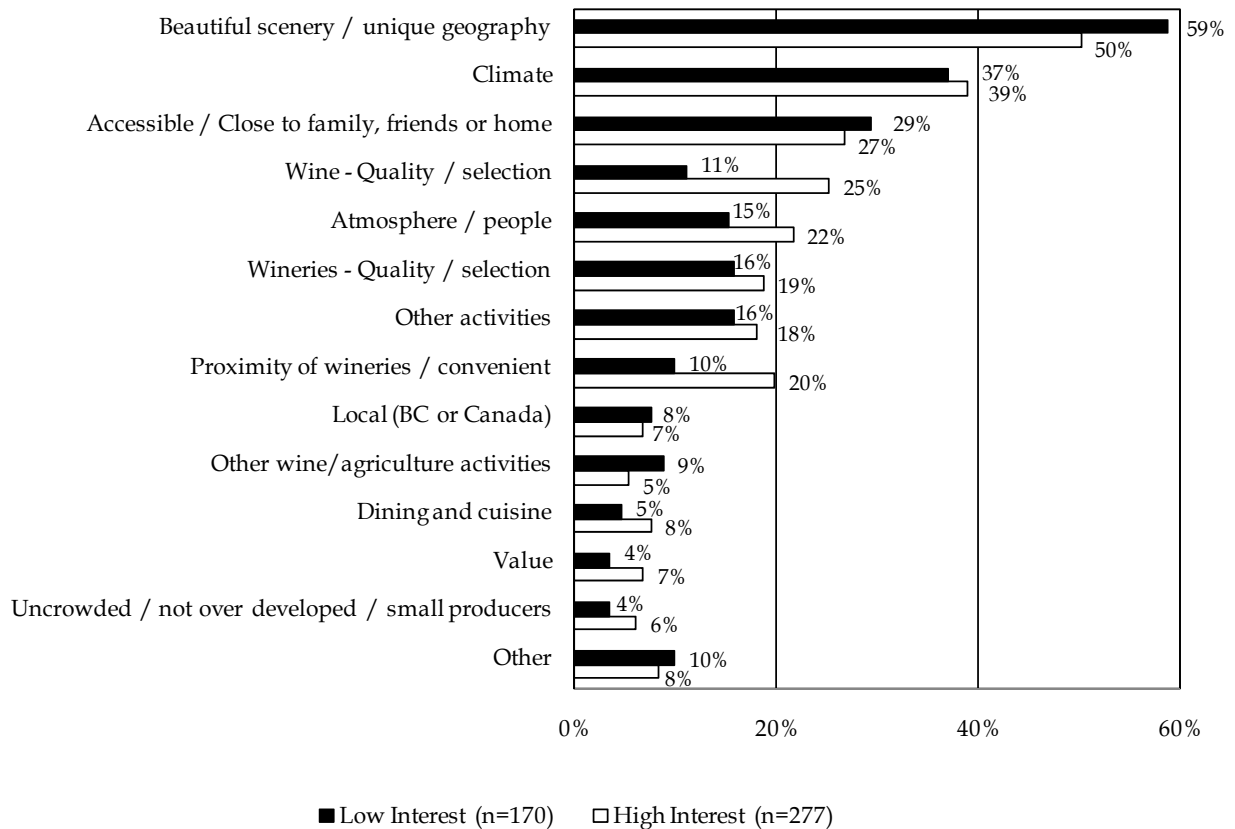


Figure 29. Unique Characteristics of the Okanagan Valley as a wine vacation destination showing importance of wine touring in trip planning (low and high interest).

When asked about the unique characteristics of British Columbia as a wine vacation destination, participants in the follow-up survey responded very similarly to unique characteristics of the Okanagan Valley. Beautiful scenery and the unique geography of the province were indicated most often (55%) and nearly a third (32%) mentioned that the province was accessible or close to family, friends or home. Considerably fewer participants (18%) mentioned the climate or provincial weather as a unique attribute.

Travellers from Canadian provinces other than British Columbia and Alberta were most likely to mention the scenery or unique geography of the province (67% compared to 55% of all leisure travellers), while these travellers and those from outside Canada were less likely to indicate the province was easily accessible or convenient for them (17% of other Canadian residents and 12% of those from outside Canada). Travellers from Alberta were most likely to indicate the province was accessible to them; nearly half (45%) mentioned this characteristic. The atmosphere or friendliness of British Columbia was mentioned by only 4% of those from other Canadian provinces, whereas among those from outside of Canada this reached a high of 28%. Nearly a third (30%) of those from other

Canadian provinces mentioned the other activities (other than wine and agricultural activities) available for them to participate in as a unique characteristic of the province.

Table 44: Characteristics of British Columbia as a wine destination by origin

	Leisure Travellers (n=366)	BC (n=209)	Alberta (n=86)	Other Canada (n=46)	Outside Canada (n=25)
Beautiful scenery / unique geography	54.9%	53.1%	52.3%	67.4%	56.0%
Accessible / Close to family, friends or home	31.7%	31.6%	45.3%	17.4%	12.0%
Climate	18.3%	14.8%	24.4%	21.7%	20.0%
Wine - Quality / selection	18.0%	16.3%	15.1%	26.1%	28.0%
Atmosphere / people	16.1%	18.7%	12.8%	4.3%	28.0%
Other activities	16.1%	12.4%	15.1%	30.4%	24.0%
Local (BC or Canada)	13.1%	14.4%	15.1%	10.9%	0.0%
Wineries - Quality / selection	9.0%	9.1%	7.0%	13.0%	8.0%
Value	8.5%	12.0%	5.8%	2.2%	0.0%
Uncrowded/not over developed/small producers	6.8%	8.6%	3.5%	2.2%	12.0%
Variety / New or unique	6.3%	7.2%	5.8%	4.3%	4.0%
Dining and cuisine <sup>1</sup>	4.4%	5.7%	1.2%	2.2%	8.0%
Proximity of wineries / convenient <sup>1</sup>	4.1%	4.3%	4.7%	2.2%	4.0%
Other wine/agriculture activities <sup>1</sup>	1.9%	1.4%	2.3%	4.3%	0.0%
Other <sup>2</sup>	15.0%	16.7%	11.6%	6.5%	28.0%

1. Small sample size (i.e. under 20 respondents) requires that results should be interpreted with caution.

2. Other includes general comments about wine or wineries (n=12), cultural aspects of the trip (n=9), accommodation (n=8) and additional individual responses (n=32).

High and low interest wine travellers provided very similar responses when asked about the unique characteristics of British Columbia as a wine vacation destination. The only category on which there was any appreciable difference was among those who commented about the quality and selection of wines available. Understandably, those who indicated that wine touring was of higher importance in trip planning were more likely to mention wine quality and selection compared to those for whom wine touring was of lower importance (23% compared to 10% of low interest wine travellers). This was similar to that seen above.

## Characteristics of British Columbia as a wine destination

Importance of wine touring in trip planning

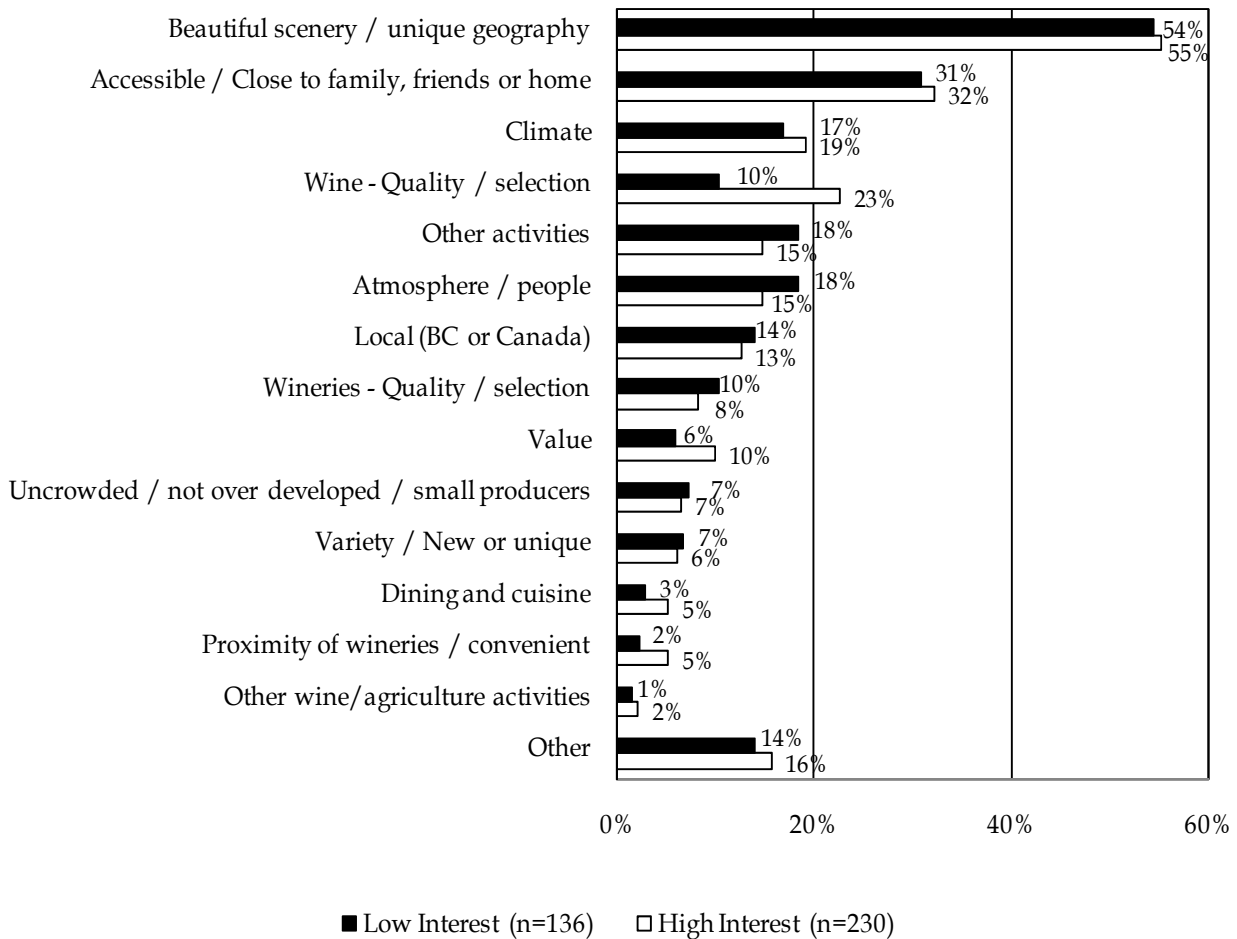


Figure 30. Unique Characteristics of British Columbia as a wine vacation destination showing importance of wine touring in trip planning (low and high interest).

### Satisfaction with Wine Touring & Overall Trip

In an effort to better understand the components of planning, purchasing and taking an Okanagan Valley wine trip that are the highest of importance to visitors, respondents were asked to rank the satisfaction and importance for various trip factors on a scale of 1 to 5 (with 1 being Very Satisfied/Important and 5 being Not at all Satisfied/Important). The results of importance vs. satisfaction ratings are summarized in scatter graph format. Respondents who stated “no opinion” or did not provide a response were removed from the average calculations.

The factor listed as most important while planning, purchasing and while on their wine trip was understanding the *Wineries offering guided tours* (mean=4.64). Importantly, this element also received the second highest rating in terms of travellers’ satisfaction (mean=4.41), indicating that wine travellers feel that it is important to able to visit a destination that offered guided tours of wineries and the Okanagan Valley is excelling in this area. The second most important component was *the level of customer service at the winery* (mean=4.5). This factor received the highest satisfaction rating of

the seventeen components asked, indicating that the level of customer service offered at Okanagan Valley wineries is meeting and possibly exceeding visitors' expectations. Most of the 17 factors were found to be Somewhat Important such as: *Wineries offering food & beverage services* and *Wineries offering retail services*, however, five aspects received somewhat not important mean scores (<3.0). The component that received the lowest importance rating was *Offering packages with my trip including accommodation, transportation and/or other activities* (mean=2.35). This accessibility factor also received the lowest satisfaction rating (mean = 3.00) indicating that while it was the lowest rated component in terms of visitor satisfaction, it was not of high important to the visitor. All seventeen factors received scores of at least somewhat satisfied (mean >3.0)

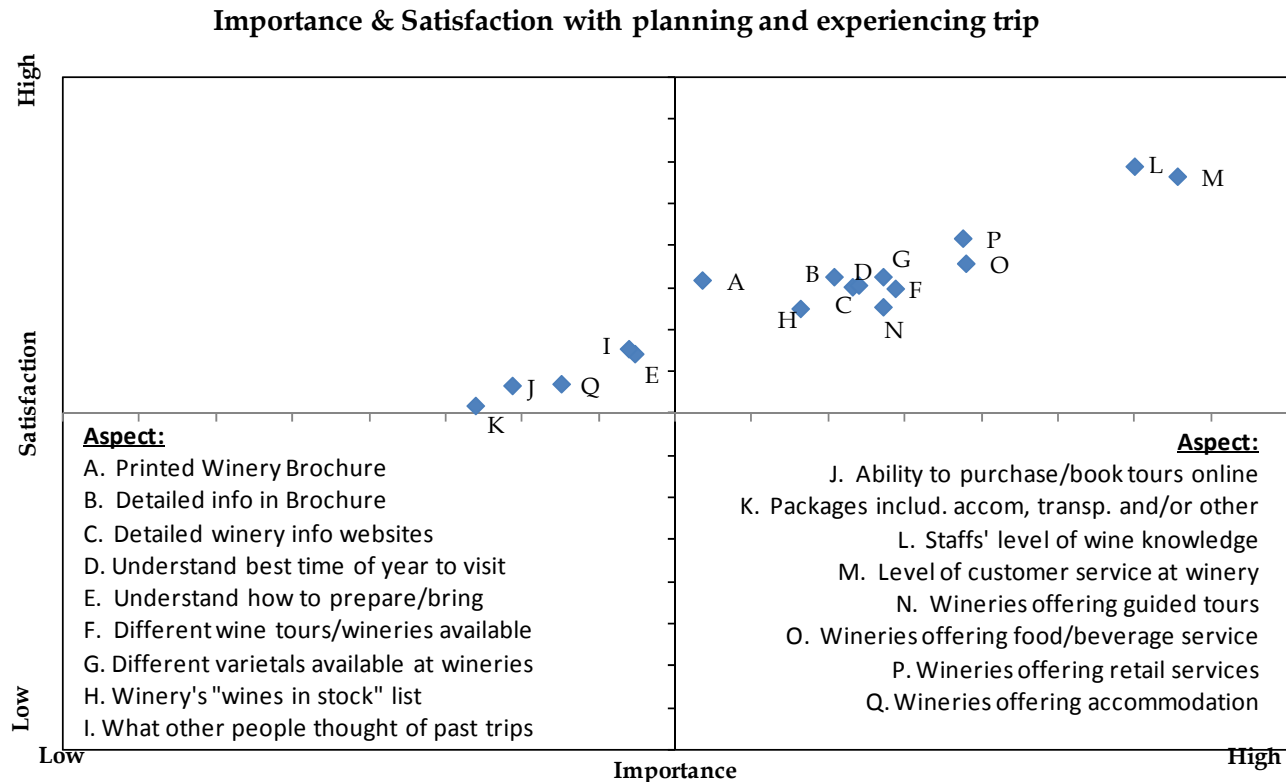


Figure 31. Destinations of future wine vacation destinations outside British Columbia showing importance of wine touring in trip planning (low and high interest).

There were some noteworthy practical differences observed between high and low interest wine travellers in terms of the factors that were important to them while trip planning, purchasing or while traveling. Having a printed brochure from the individual wineries was more important for high interest wine travellers with half (50%) indicating this was either very or somewhat important to them (compared to 40% of low interest travellers). In their search for information for travel planning, high interest wine travellers also were much more likely to provide a high importance ranking to finding detailed information online about BC wineries. This was rated as either very or somewhat important by nearly three quarters (73%) of high interest wine travellers compared to just over half (52%) of those for whom wine touring was less important in trip planning.

High interest wine travellers also placed greater importance on understanding the best time of year to travel (68% compared to 48% of low interest wine travellers), understanding the different kinds of tours and wineries available to visit (76% compared to 60% of low interest travellers), understanding the different varietals available (69% compared to 57%), understanding a wineries "wines-in-stock" list (64% compared to 41%), and wineries offering food and beverage services (78% compared to 67%). Additionally, even though the differences on all other factors were not of practical significance, high interest wine travellers rated each item of more importance compared to those for whom wine touring was of lesser importance. This would appear to indicate that those with a high interest in wine touring place a greater importance generally on the ability to access information for trip planning, purchasing and while travelling, in particular as it pertains to specific details about wines and wineries.

### Importance of various factors in trip planning and purchase decisions

*Importance of wine touring in trip planning*

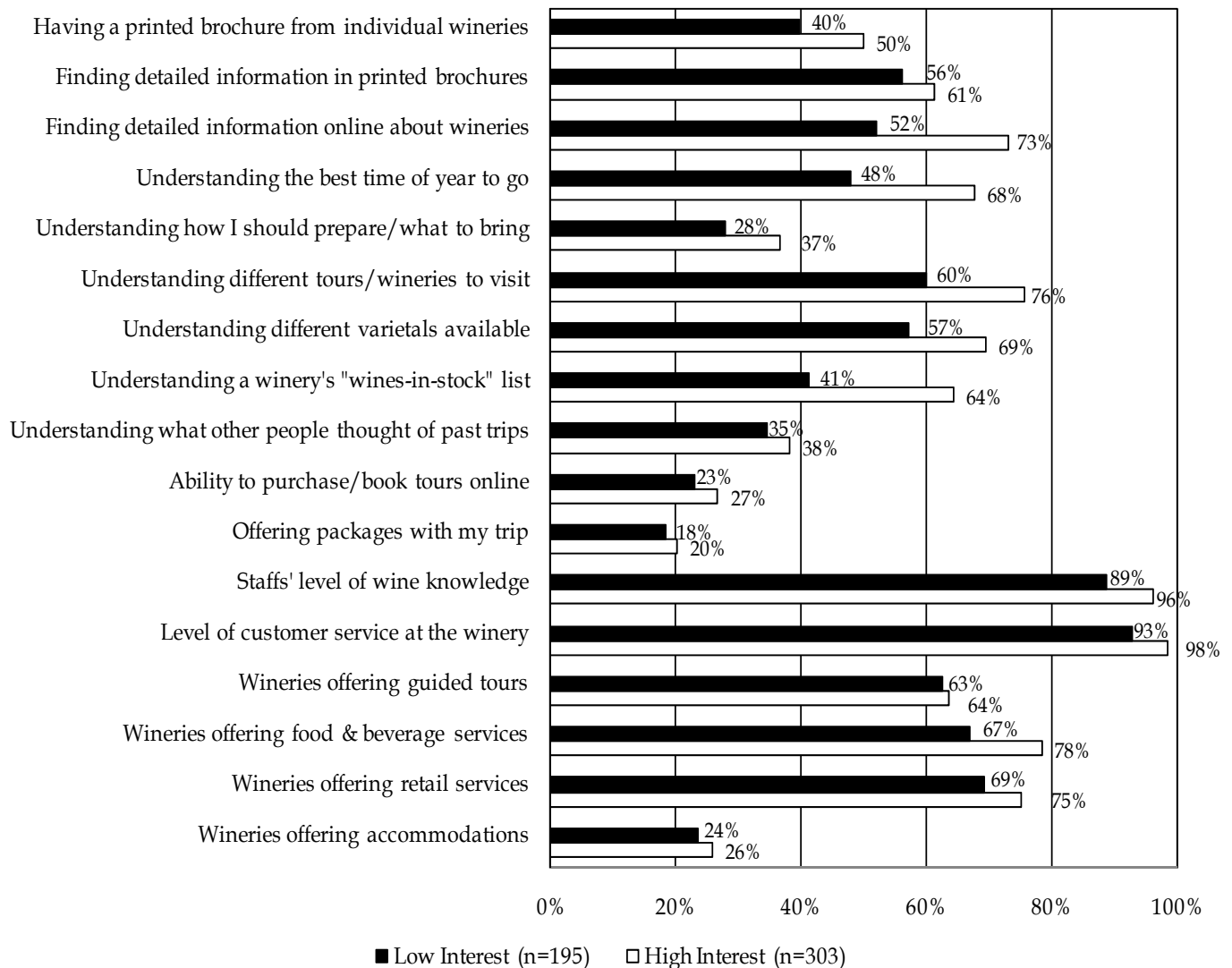


Figure 32. Percentage of leisure travellers who reported either very or somewhat important for each of the factors listed in terms of trip planning, trip purchasing, and while traveling showing importance of wine touring in trip planning (low and high interest).



There were only a few practical differences observed in terms of level of satisfaction of high and low interest wine travellers. High interest wine travellers reported higher levels of satisfaction on having a printed brochure from individual wineries (63% very or somewhat satisfied compared to 50% of low interest wine travellers). High interest wine travellers were also more likely to report higher levels of satisfaction with finding information online about BC wineries (67% compared to 51% of low interest wine travellers), understanding different tours and wineries to visit (67% compared to 56%), and wineries offering food and beverage services (70% of high interest compared to 58% of low interest wine travellers who indicated they were satisfied).

### Satisfaction with trip planning and purchase decisions

*Importance of wine touring in trip planning*

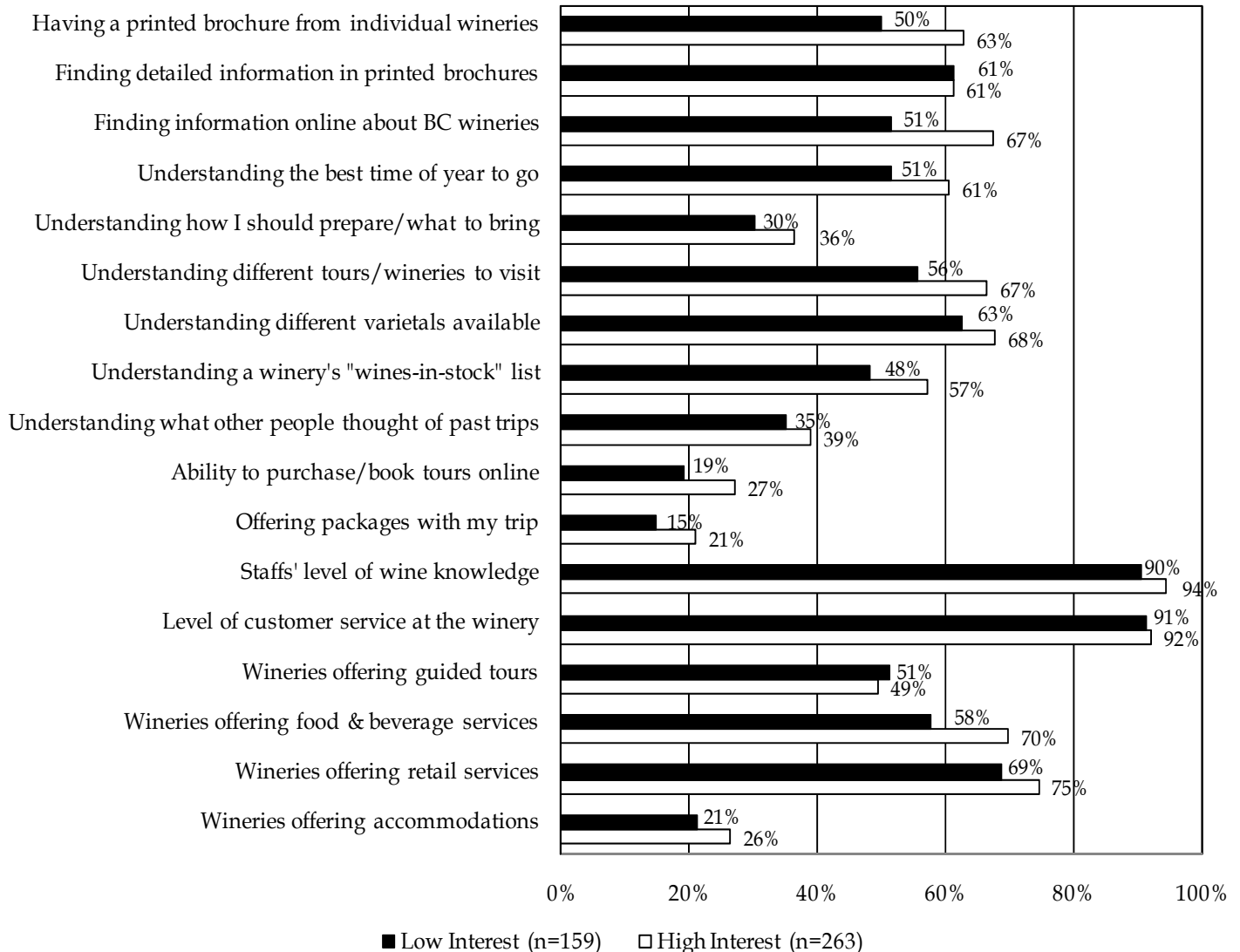


Figure 33. Percentage of leisure travellers who reported either very or somewhat satisfied with each of the factors listed in terms of trip planning, trip purchasing, and while traveling showing importance of wine touring in trip planning (low and high interest).

Well over three quarters (79%) of all leisure travellers indicated that they were very satisfied with their wine touring experience in the Okanagan Valley. An additional 13% of participants in the follow-up survey mentioned that they were somewhat satisfied, which results in a total of 92% of all

participants indicating that they were satisfied with their experience. There were no practical differences observed in terms of the level of satisfaction by travellers from different origins.

When respondents were asked to explain the satisfaction rating they provided for their wine touring experience in the Okanagan Valley the vast majority of comments were positive. Nearly one half (46%) of the responses provided were related to a high level of service or the amenities (including accommodation). An additional 34% were related to high quality wine and food, while 26% were related to the relaxed atmosphere or friendliness of the people. One fifth (20%) of the responses included a negative comment or felt that there was a service or amenity that was lacking. These included comments regarding the lack of a complete tour of the wine processing facilities, no children's programs provided, poor accommodation, expensive wine, and a lack of information available (See Appendix C for full commentary).

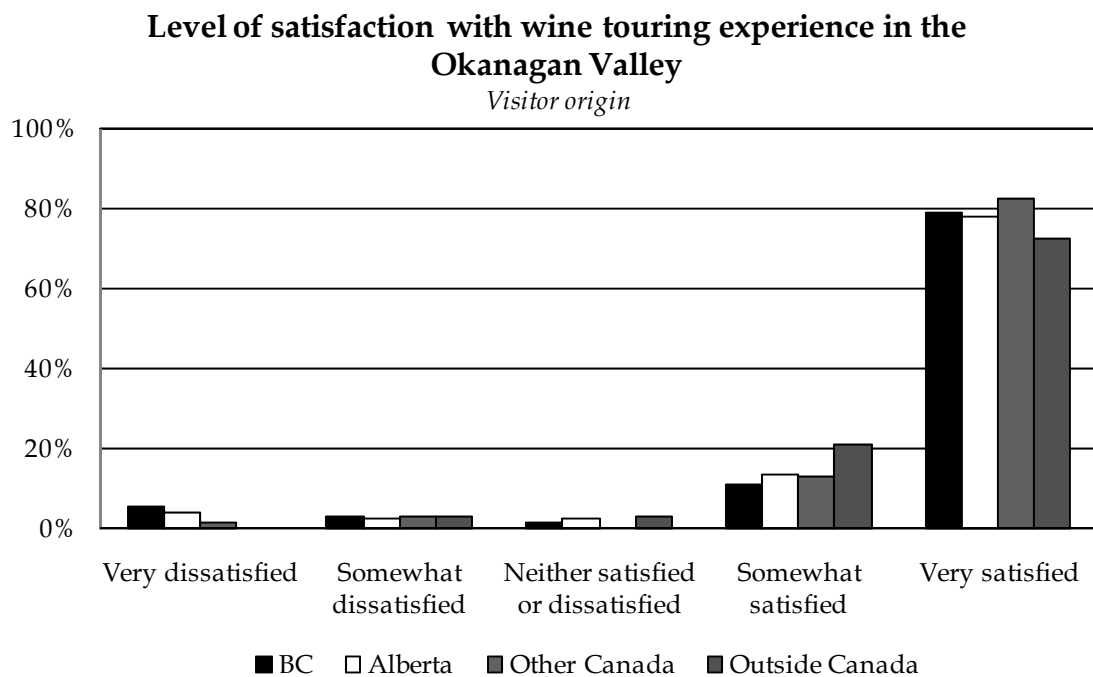


Figure 34. Level of satisfaction with wine touring experience in Okanagan Valley showing origin.

### Reasons for level of satisfaction with wine touring experience

*Importance of wine touring in trip planning*

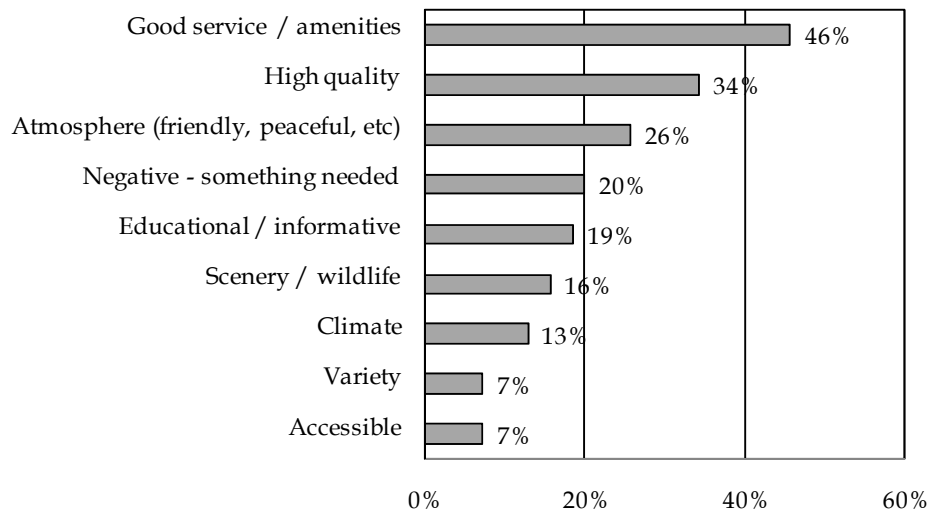


Figure 35. Explanations provided for level of satisfaction rating for wine touring experience in Okanagan Valley. A total of 70 responses were received for this question. Multiple responses were permitted. Only categories receiving 5% or more of the total responses are shown.

While both high interest and low interest wine travellers both showed high levels of satisfaction with their wine touring experience in the Okanagan Valley, high interest wine travellers were more likely to indicate that they were very satisfied (84% compared to 72% of low interest travellers). Conversely, low interest wine travellers were more likely to state that they were somewhat satisfied (18% compared to 9% of high interest wine travellers).

### Level of satisfaction with wine touring experience in the Okanagan Valley

*Importance of wine touring in trip planning*

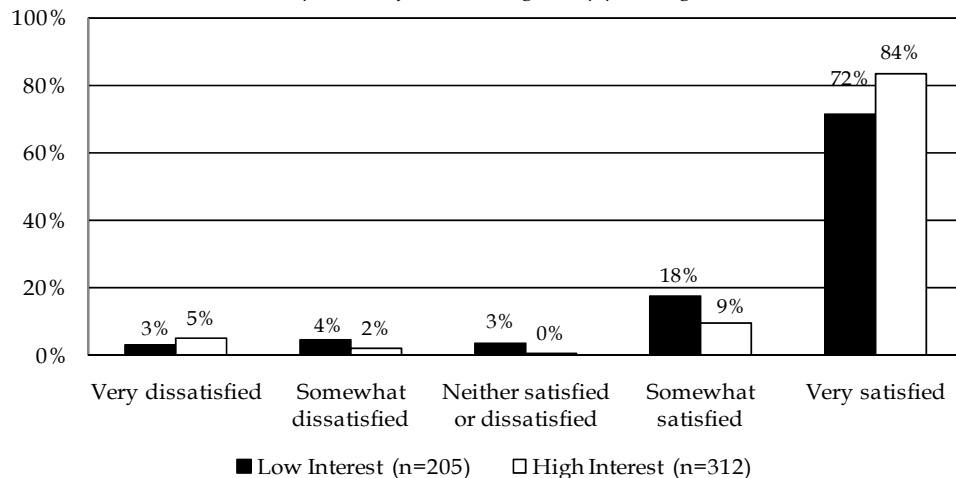


Figure 36. Responses to the question, "Overall, how satisfied or dissatisfied were you with your wine touring experience in the Okanagan Valley?" showing importance of wine touring in trip planning (low and high interest).

When asked to indicate the level of satisfaction with their total trip in British Columbia, the vast majority (89%) of all leisure travellers indicated they were very satisfied, while nearly all of the remainder (7%) mentioned that they were somewhat satisfied. Overall, 96% of all leisure travellers indicated they were satisfied with their trip (Table 56).

A total of 62 participants provided comments to explain the level of satisfaction they gave for their total trip in British Columbia. Nearly a third (31%) of those who provided comments simply mentioned that they loved BC. This was followed by 29% who commented that the atmosphere was relaxed and the people friendly, and 24% who commented on the scenery and wildlife in the province. A total of 13% provided negative comments that included poor accommodation, limited amenities, costly, and poor weather conditions. There were no practical differences in level of satisfaction for the trip in British Columbia by traveller origin. The highest levels of satisfaction were from travellers from outside of Canada (94%).

Table 45. Level of Satisfaction with Total Trip to British Columbia by visitor origin.

	Leisure Travellers (n=514)	BC (n=279)	Alberta (n=133)	Other Canada (n=69)	Outside Canada (n=33)
Very dissatisfied	2.7%	2.9%	3.8%	0.0%	3.0%
Somewhat dissatisfied	0.8%	0.7%	1.5%	0.0%	0.0%
Neither satisfied or dissatisfied	1.0%	1.4%	0.0%	1.4%	0.0%
Somewhat satisfied	6.8%	6.1%	8.3%	8.7%	3.0%
Very satisfied	88.7%	88.9%	86.5%	89.9%	93.9%

### Reasons for level of satisfaction with total trip in BC

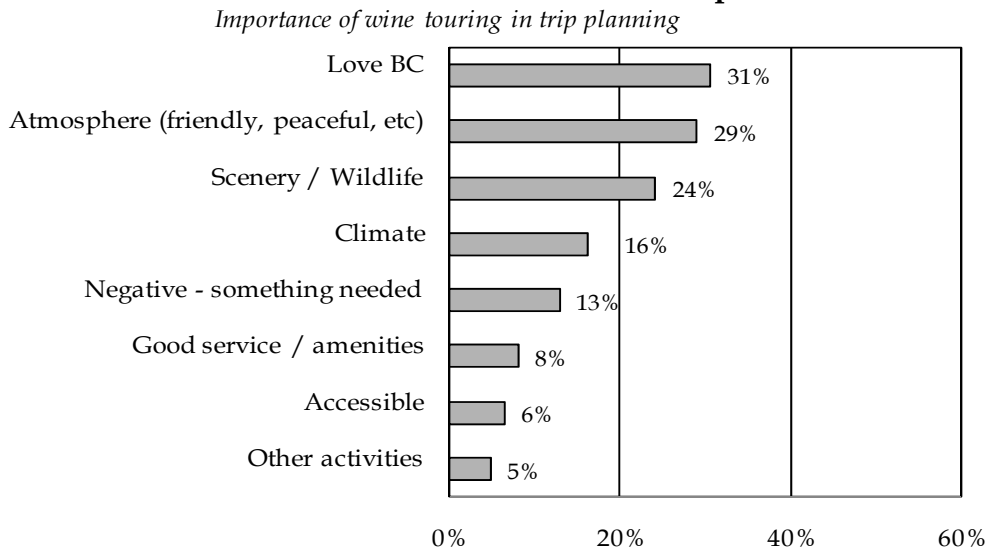


Figure 37. Explanations provided for level of satisfaction rating for total trip in British Columbia. A total of 62 responses were received for this question. Multiple responses were permitted. Only categories receiving 5% or more of the total responses are shown.

Comparing low and high interest wine travellers in terms of the level of satisfaction with the total trip in British Columbia revealed virtually no difference.

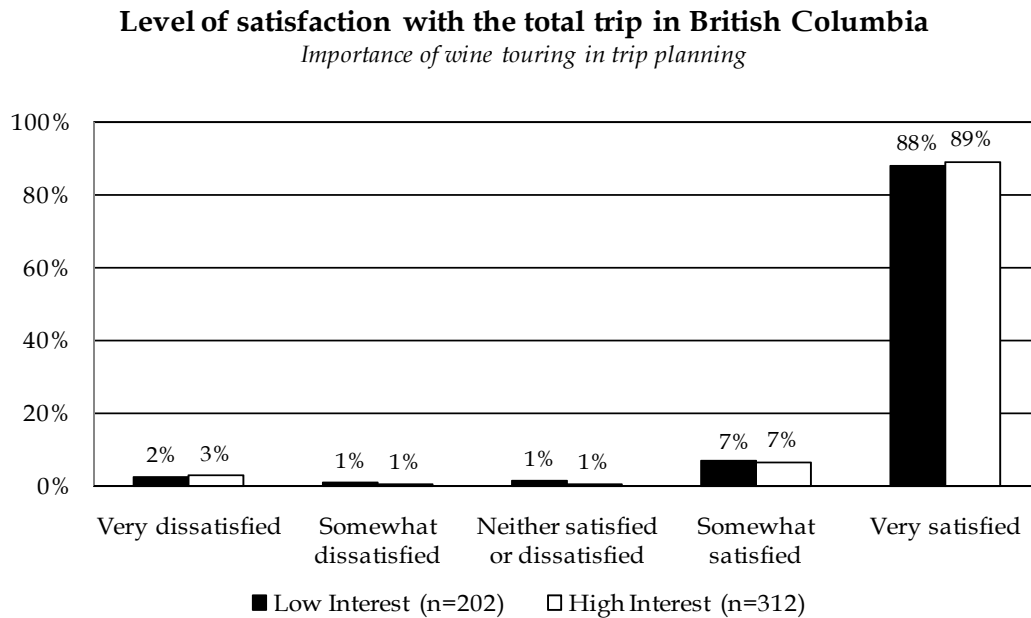


Figure 38. Responses to the question, “Overall, how satisfied or dissatisfied were you with your total trip in British Columbia?” showing importance of wine touring in trip planning (low and high interest).

### *Likelihood of Future Leisure Travel*

Over half of all leisure travellers (51%) indicated that they would be likely to take a return trip to Okanagan Valley wineries in the next two years, with the bulk of this group stating that this return trip was very likely (40% of all leisure travellers). Less than a third (29%) indicated that they were not at all likely to return.

Practical differences were observed in the likelihood of return to wineries in the Okanagan Valley, particularly among those from Canadian provinces other than British Columbia and Alberta and those from outside Canada. Travellers from other Canada and outside Canada were considerably more likely to indicate they were somewhat likely to return (23% and 29%, respectively).

Interestingly, fewer travellers from these origins stated that they would be not at all likely to return (16% of those from other Canadian provinces and 12% of those from outside Canada. British Columbia residents were virtually evenly divided with 43% stating they were very likely to return and 35% stating they were not at all likely to return.

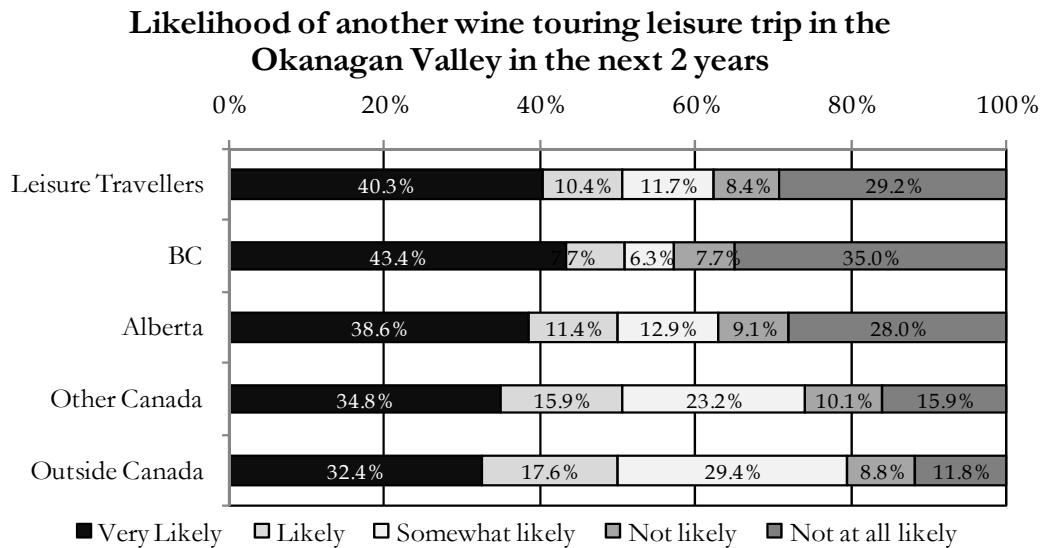


Figure 39. Likelihood of taking another leisure trip that involves visiting wineries in the Okanagan Valley in the next two years showing markets of visitor origin.

There were considerable differences in the likelihood of a return trip to visit the wineries of the Okanagan Valley by high and low interest wine travellers. Those for whom wine travel was an important component in trip planning were far more likely to indicate that they were very likely to return (79% compared to 37% of low interest travellers). Among all other likelihood categories, however, there were no appreciable differences observed.

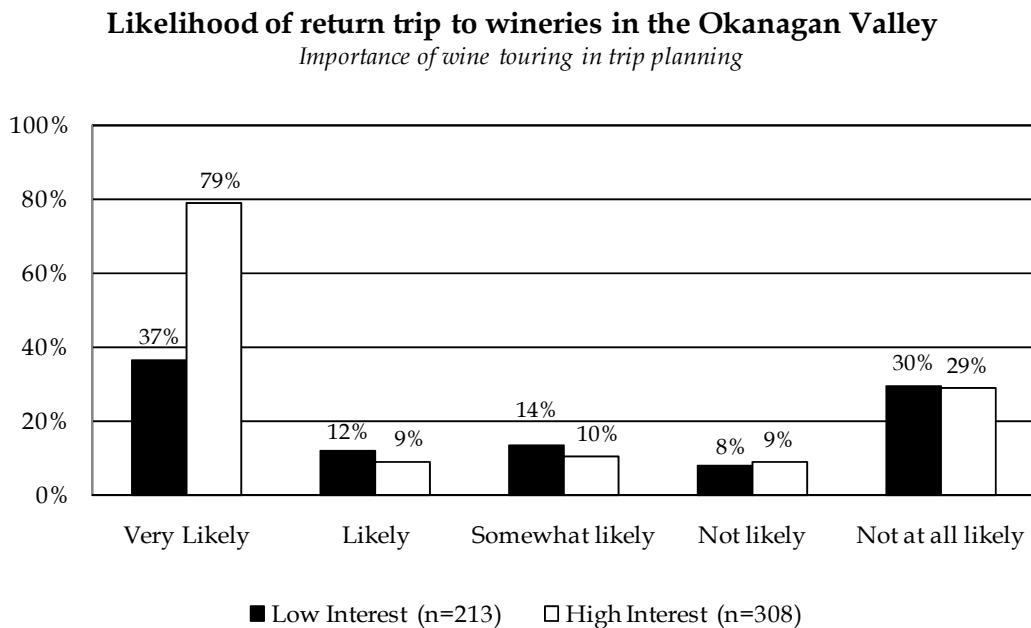


Figure 40. Likelihood of taking another leisure trip that involves visiting wineries in the Okanagan Valley in the next two years showing importance of wine touring in trip planning (low and high interest).

Leisure travellers were far less likely to indicate that they would be likely to take another trip in the next two years that involved visiting wineries in other regions of British Columbia compared to the Okanagan Valley. Overall, just over a third (38%) indicated that such a trip would be likely, with just 20% of all travellers indicating that a trip to a winery in another British Columbia region would be very likely. A third (33%) stated that this future trip would be either not likely or not at all likely. There were no practical differences observed by traveller origin.

Table 46: Likelihood of taking another leisure trip in the next two years that includes visiting wineries in other regions in British Columbia by origin

	Leisure Travellers (n=460)	BC (n=246)	Alberta (n=118)	Other Canada (n=64)	Outside Canada (n=32)
Very Likely	20.4%	21.1%	16.1%	21.9%	28.1%
Likely	17.8%	15.9%	19.5%	21.9%	18.8%
Somewhat likely	28.9%	31.7%	28.0%	21.9%	25.0%
Not likely	17.6%	13.4%	23.7%	21.9%	18.8%
Not at all likely	15.2%	17.9%	12.7%	12.5%	9.4%

High and low interest wine travellers were virtually identical in terms of the likelihood of taking a trip in the next two years that included a visit to a winery in another region of British Columbia.

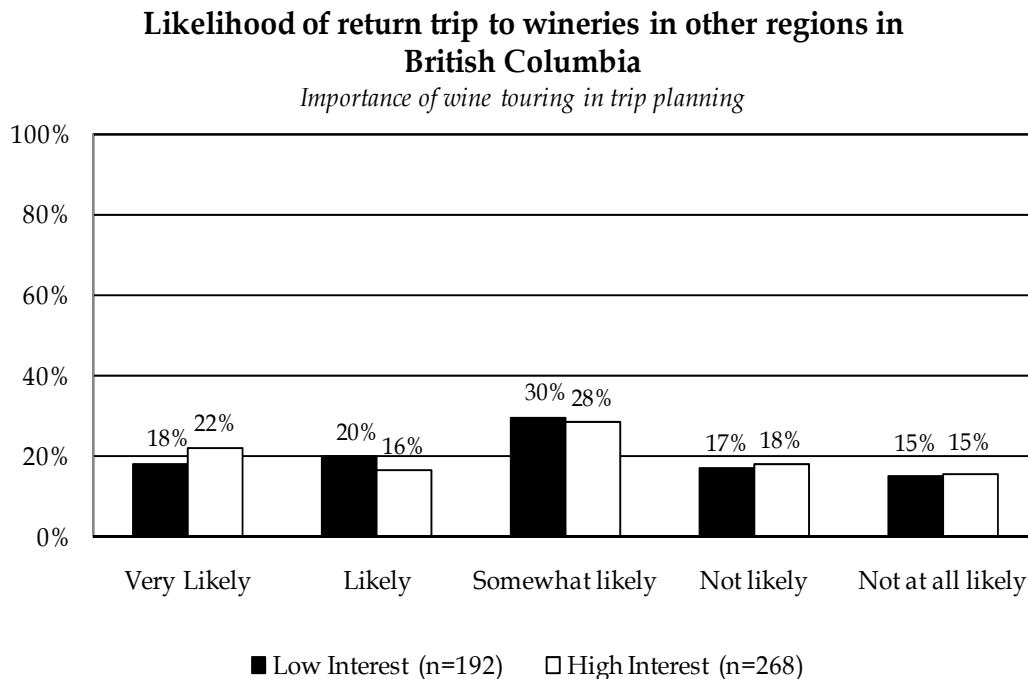


Figure 41. Likelihood of taking another leisure trip that involves visiting wineries in other regions of British Columbia in the next two years showing importance of wine touring in trip planning (low and high interest).

The follow-up survey asked leisure travellers to identify other destinations, both within and outside of British Columbia, they would consider for future wine vacations. Just over half (54%) indicated that they would select a destination in the Okanagan again. This was followed fairly closely by 52% who indicated that they would select a destination in the Vancouver Island region (including the Gulf Islands).

There was some variation in terms of the British Columbia destination listed by those from other Canadian provinces and those from outside Canada compared to travellers from British Columbia and Alberta. Those from outside Canada were most likely to indicate another destination in the Okanagan Valley (87%) followed by those from Alberta (73%). Travellers from Alberta were considerably less likely (59%), but those from British Columbia were least likely (46%). Travellers from British Columbia were more likely to indicate a destination on Vancouver Island (58%) than another destination in the Okanagan Valley.

Table 47: BC destinations considered for future wine vacations by origin

	<b>Leisure Travellers (n=289)</b>	<b>BC (n=179)</b>	<b>Alberta (n=65)</b>	<b>Other Canada (n=30)</b>	<b>Outside Canada (n=15)</b>
Okanagan Valley	53.6%	45.8%	58.5%	73.3%	86.7%
Other Thompson Okanagan <sup>1</sup>	1.7%	1.7%	1.5%	0.0%	6.7%
Vancouver Island and the Gulf Islands	52.2%	58.1%	47.7%	33.3%	40.0%
Lower Mainland (including Fraser Valley)	19.0%	21.2%	13.8%	16.7%	20.0%
Other British Columbia <sup>1</sup>	6.2%	7.3%	4.6%	6.7%	0.0%

1. Small sample size (i.e. under 20 respondents) requires that results should be interpreted with caution.

High and low interest wine travellers were virtually identical in terms of the British Columbia destinations for future wine vacations listed. There was also a relatively even split between those who selected destinations in the Okanagan Valley and those who mentioned possible future travel to a destination on Vancouver Island or in the Gulf Islands.



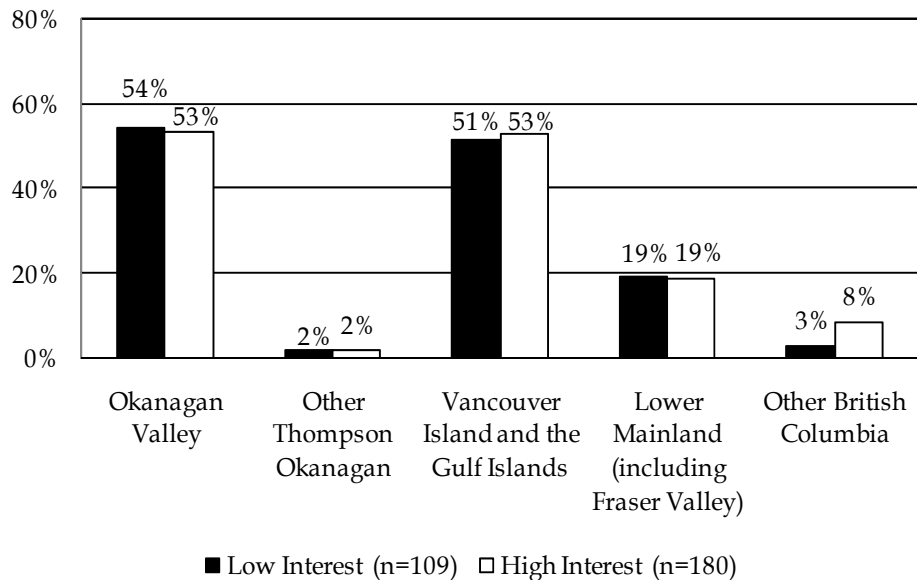
**BC destinations considered for future wine vacations***Importance of wine touring in trip planning*

Figure 42. Destinations of future wine vacation destinations within British Columbia showing importance of wine touring in trip planning (low and high interest).

Among leisure travellers who indicated on the follow-up survey a destination outside of BC that they would consider for future wine vacations, destinations in the United States were listed most often. Over two thirds (68%) of leisure travellers mentioned a destination in the United States with 50% of travellers considering a possible future wine vacation to California. International destinations were mentioned by over half (58%) with a third (33%) considering a possible future wine vacation in France. Nearly one quarter (23%) mentioned a possible trip to Italy, and, a quarter (26%) mentioned that they would consider a future wine vacation to another location in Canada. Of which the vast majority of these comprised of possible future trips to Ontario (23%).

Travellers from Alberta and other Canadian provinces were most likely to indicate that they would consider a trip to a destination outside of BC but within Canada. Over half (54%) of those from other Canadian provinces mentioned they would consider another destination in Canada. Travellers from British Columbia were more likely to indicate a possible future trip to the United States. Over three quarters (76%) of British Columbia leisure travellers mentioned the United States, in particular California (67%), while less than half of travellers from other Canadian provinces (44%) and outside Canada (47%) indicated a possible trip to the US. Travellers from other Canadian provinces were considerably more likely to mention an international destination for a future wine vacation. Nearly three quarters (71%) mentioned they would consider international destinations compared to only 55% of leisure travellers from British Columbia.

Table 48: Destinations outside British Columbia considered for future wine vacations by origin

	Leisure Travellers (n=364)	BC (n=213)	Alberta (n=84)	Other Canada (n=48)	Outside Canada (n=19)
<b>Canada</b>	25.5%	16.0%	35.7%	54.2%	15.8%
Ontario	22.5%	14.6%	31.0%	47.9%	10.5%
Other Canada <sup>1</sup>	5.2%	1.9%	10.7%	8.3%	10.5%
<b>US</b>	67.9%	75.6%	66.7%	43.8%	47.4%
California	60.4%	66.7%	63.1%	43.8%	21.1%
Oregon	12.6%	13.6%	14.3%	6.3%	10.5%
Washington	14.3%	18.3%	9.5%	4.2%	15.8%
Other US <sup>1</sup>	1.6%	1.4%	2.4%	0.0%	5.3%
<b>International</b>	57.7%	54.5%	58.3%	70.8%	57.9%
Italy	22.8%	20.2%	25.0%	35.4%	10.5%
France	33.0%	35.2%	21.4%	41.7%	36.8%
Other Europe	14.8%	14.6%	14.3%	12.5%	26.3%
Australia / New Zealand	14.0%	15.0%	13.1%	10.4%	15.8%
Other International	8.8%	6.6%	11.9%	10.4%	15.8%

1. Small sample size (i.e. under 20 respondents) requires that results should be interpreted with caution.

Both high and low interest wine travellers provided similar responses when asked about wine vacation destinations outside of British Columbia. High interest wine travellers were, however, slightly more likely to have reported a wine destination outside of British Columbia for each possible destination category. The difference was greatest among those who mentioned possible future wine vacations to the United States (70% for high interest wine travellers, compared to 64% for low interest travellers).

### Destinations outside British Columbia considered for future wine vacations

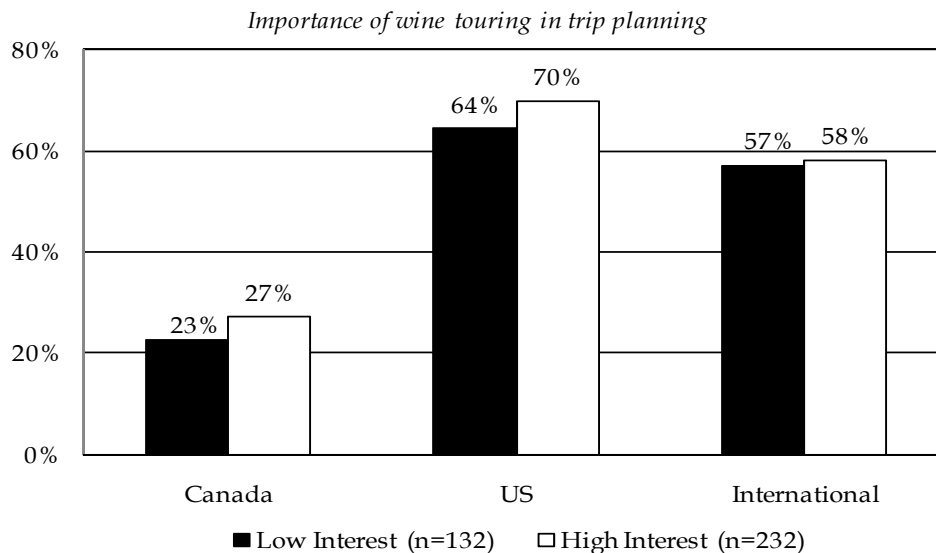


Figure 43. Destinations of future wine vacation destinations outside British Columbia showing importance of wine touring in trip planning (low and high interest).

### *Competitiveness of Okanagan Valley Wine & Destination*

On the follow-up survey leisure travellers were asked to indicate how they felt that a VQA bottle of wine from the Okanagan Valley compared to a similar bottle from different wine regions in terms of quality, price and overall value. Participants could indicate that:

- a. The Okanagan Valley wine was better,
- b. The wine from the other region was better, or
- c. There was no difference between the two.

In terms of quality, nearly three quarters of participants (74%) indicated that the Okanagan Valley wine was better when compared with a similar bottle from another BC wine region. Slightly fewer (69%) indicated that the Okanagan Valley wine was better when compared with a wine from Ontario. Okanagan Valley wines, however, ranked the lowest in terms of quality when compared with wines from Europe and Australia (only 23% each rated the Okanagan wine superior compared to wines from these regions).

Okanagan Valley wines were ranked comparably lower in terms of price. Just over a third of leisure travellers indicated that Okanagan Valley wines were better in terms of price when compared to wines from other BC regions (37%), Ontario (34%), and Europe (34%). On the lower end of the scale, only 18% indicated that Okanagan Valley wines were better than comparable wine from Chile in terms of price.

When wines from the Okanagan Valley were compared to the other wine producing regions in terms of overall value, the Okanagan Valley wines fared better. Approximately two thirds of leisure travellers ranked the Okanagan Valley wine superior on overall value when compared to wines from other BC wine regions (67%) and Ontario (65%). Just over one quarter of travellers (27%) felt that Okanagan wines were superior to wines from Australia in terms of overall value, while a third (34%) believed Okanagan wines were better in terms of overall value when compared to wines from Europe.

For the most part, there were few practical differences observed by origin of participant. Residents of other Canadian provinces were less likely to rank Okanagan Valley wines superior to wines from Ontario in terms of quality, while they were more likely to rate the quality wines from the Okanagan as superior to wines from Chile. Residents of Alberta were more likely to indicate that Okanagan Valley wines were better in terms of price and overall value compared to wines from Europe.

Table 49: Percentage of travellers who rated the Okanagan Valley wine better in terms of quality, price and overall value compared to select other wine regions by origin

	Leisure Travellers (n=353) <sup>1</sup>	BC (n=206)	Alberta (n=79)	Other Canada (n=46)	Outside Canada (n=22)
<b>Quality</b>					
Other BC regions	73.9%	75.7%	70.9%	69.6%	77.3%
Ontario	68.6%	71.4%	67.6%	56.8%	76.9%
California	34.6%	33.9%	34.7%	39.0%	31.6%
Europe	23.3%	20.6%	29.7%	25.6%	22.7%
Australia	23.0%	24.3%	19.1%	20.0%	30.0%
Chile	42.6%	44.0%	33.8%	54.1%	36.8%
South Africa	45.3%	48.4%	39.3%	52.6%	22.2%
<b>Price</b>					
Other BC regions	36.7%	35.4%	40.3%	41.5%	23.5%
Ontario	34.4%	33.3%	39.7%	30.2%	33.3%
California	28.6%	24.9%	36.6%	30.0%	31.6%
Europe	33.8%	31.6%	45.3%	25.6%	31.6%
Australia	19.9%	18.7%	25.4%	20.0%	11.1%
Chile	18.3%	19.9%	19.4%	15.4%	5.9%
South Africa	22.8%	20.3%	28.3%	28.9%	13.3%
<b>Overall value</b>					
Other BC regions	67.1%	68.6%	63.2%	68.2%	64.7%
Ontario	64.7%	67.5%	65.1%	55.8%	58.3%
California	42.0%	39.7%	50.7%	43.9%	27.8%
Europe	33.9%	32.3%	46.6%	20.0%	38.9%
Australia	27.1%	31.0%	22.6%	19.5%	23.5%
Chile	36.2%	37.5%	36.2%	31.6%	33.3%
South Africa	42.5%	43.4%	46.0%	42.1%	21.4%

1. Sample sizes shown are based on the highest number of valid response reported across all items presented. Individual sample sizes for each item reported vary slightly.

Exploring the percentage of high and low interest wine travellers who indicated that the VQA wines of the Okanagan Valley were superior to those from other wine regions revealed a few practical differences. High interest wine travellers were more likely to state that Okanagan wines were of superior quality compared to other BC regions (79% of high interest wine travellers compared to 65% of low interest travellers), Europe (28% compared to 15%), and Chile (48% compared to 32% among low interest wine travellers). Interestingly, high interest wine travellers were more likely to rank the Okanagan wine superior in quality than low interest wine travellers for each of the wine regions specified.

### Percentage ranking quality of Okanagan Valley wine better

*Importance of wine touring in trip planning*

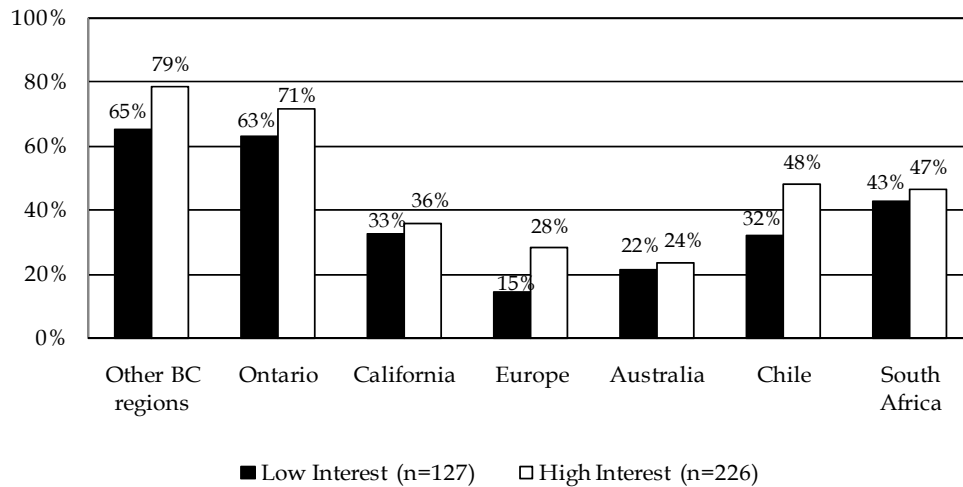


Figure 44. Percentage of travellers who ranked Okanagan Valley VQA wine better in terms of quality than comparable wine in each region showing importance of wine touring in trip planning (low and high interest).

High and low interest wine travellers were more similar in terms of the percent ranking Okanagan Valley wines superior in terms of price. There were no practical differences observed by importance of wine touring. However, low interest wine travellers were more likely than high interest wine travellers to rank Okanagan Valley wines as superior in terms of price across all regions, with the exception of wines from Chile and South Africa. When compared against these two regions, high interest wine travellers were only marginally more likely to rank Okanagan Valley wines superior.

### Percentage ranking price of Okanagan Valley wine better

*Importance of wine touring in trip planning*

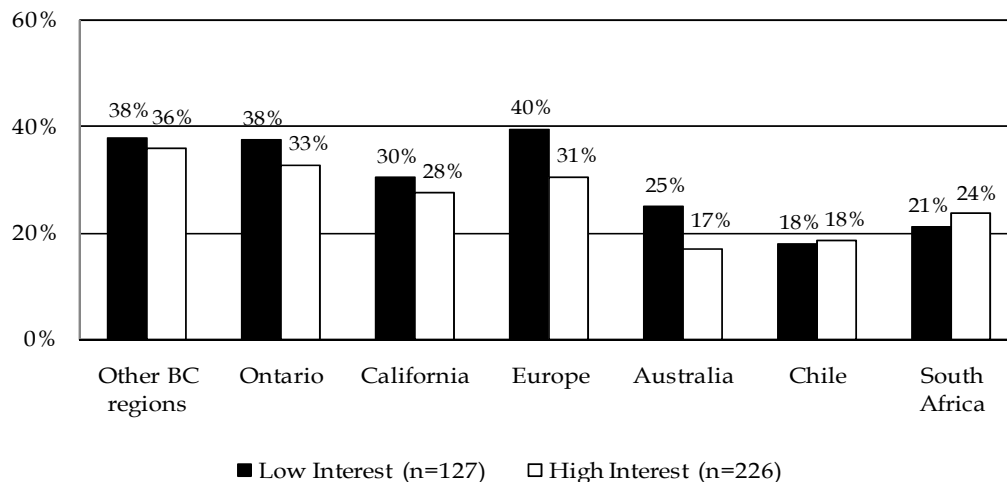


Figure 45. Percentage of travellers who ranked Okanagan Valley VQA wine better in terms of price than comparable wine in each region showing importance of wine touring in trip planning (low and high interest).

When asked to indicate whether Okanagan Valley VQA wines were superior to comparable wines from other regions, high and low interest wine travellers provided similar responses, with the exception of wines from other BC regions. Nearly three quarters (72%) of high interest wine travellers indicated that Okanagan Valley wines were superior to wines from other British Columbia regions in terms of overall value (compared to 58% of low interest wine travellers).

Although the differences between high and low interest wine travellers were not practically significant for wines from other regions, high interest wine travellers were marginally less likely to indicate that Okanagan Valley wines were superior in overall value compared to wines from Ontario, California and Europe. High interest wine travellers were marginally more likely to indicate that Okanagan Valley wines were superior in terms of overall value compared to wines from Australia, Chile, and South Africa. Other than on wines from other British Columbia regions, the largest margin of difference between high and low interest wine travellers was seen on wines from South Africa. Nearly half (46%) of high interest wine travellers believed Okanagan Valley wines were superior, compared to just over a third (36%) of low interest wine travellers.

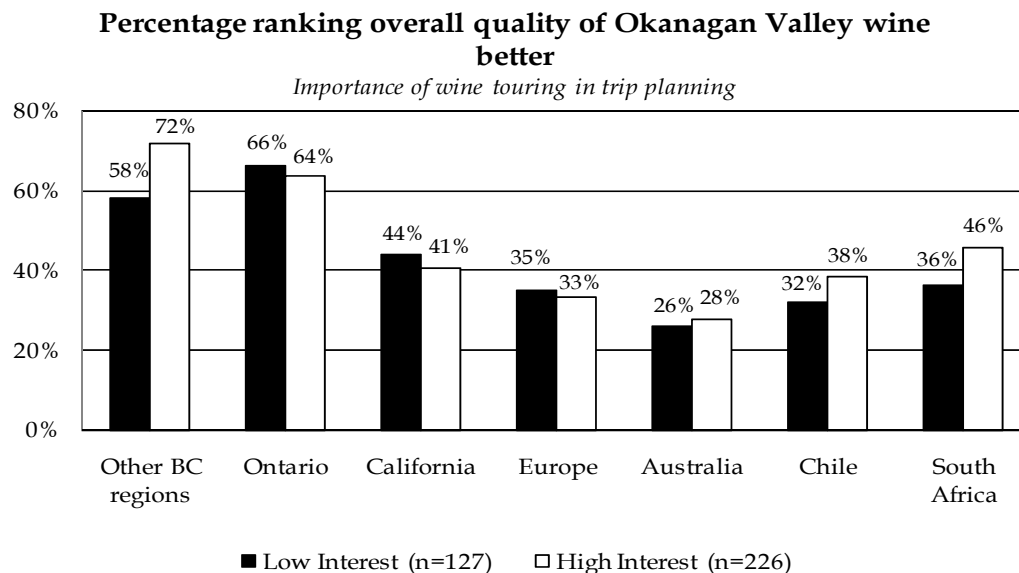


Figure 46. Percentage of travellers who ranked Okanagan Valley VQA wine better in terms of overall value than comparable wine in each region showing importance of wine touring in trip planning (low and high interest).

### **Trip Expenditures**

During the intercept interview travellers were asked to specify their total expenditures<sup>6</sup>. On average, independent leisure travellers reported daily spending in the amount of \$304.99. There was very little difference in terms of average daily expenditures by origin, with the exception of travellers from outside of Canada. These travellers reported average daily expenditures of \$255.23. This could be related to the fact that these travellers were more likely to be travelling for the purposes of visiting friends and family and less likely to be travelling for leisure.

Leisure travellers who were staying at a fixed roof accommodation, including resorts, hotels, motels, and bed and breakfasts had the highest average daily expenditures at \$377.25. This was followed by those who were staying in second or rental homes or timeshares who reported average daily expenditures of \$359.52. Those staying in campgrounds or RV parks reported the lowest daily expenditures at \$202.38. Even within the same accommodation type, travellers from outside Canada reported lower average daily expenditures than travellers from other origins, with the exception of those who were staying in second or rental homes or timeshares. Travellers from outside Canada who were staying in second or rental homes or timeshares reported average daily expenditures over \$100 more than all leisure travellers using this form of accommodation (\$475.00 compared to \$359.52). Travellers from Canadian provinces other than British Columbia and Alberta who were staying either in campgrounds or RV parks or in second or rental homes or timeshares also reported higher average daily expenditures compared to all leisure travellers.

Not surprisingly, average daily expenditures increased with travel party size. Those travelling alone spent the least at \$173.93 compared to those travelling in large groups of seven or more who spent an average of \$446.82 per day. This pattern remained consistent across all groups with the exception of those travelling from Alberta. Travel parties from Alberta with seven or more people spent less than travel parties with between three and six people (\$303.33 compared to \$343.94). Sample sizes in this particular group are low, however, and results should be interpreted with caution. Persons travelling alone from other Canadian provinces reported higher daily expenditures (\$202.83), especially compared to those from outside Canada (\$118.13).

There was no clear pattern in average daily expenditures by age. Travellers between 45 and 54 years of age reported the highest daily expenditures at \$348.20, while those age 65 or over spent the lowest at \$246.76. There were some practical differences in spending by origin within age groups. Travellers from British Columbia under 24 years of age spent more than their counterparts from other origins (\$328.40 compared to \$258.07 for all leisure travellers in this age group). Again, however, small sample sizes for this age group by origin warrant caution in interpreting this finding.

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<sup>6</sup> Day travellers (n=9) specified their travel party's total expenditures on the current day, while overnight travellers (n=1,595) specified their travel party's total expenditures on the previous day of travel. A total of 93 overnight travellers indicated they began their trip on the current day, while 53 could not supply information for daily expenditures. These participants have been removed from the analysis.

Table 50: Average daily expenditures for independent leisure travellers by origin and traveller characteristics

\$CDN Daily Expenditures <sup>1</sup>	Leisure Travellers (n=1,503)	BC (n=766)	Alberta (n=391)	Other Canada (n=200)	Outside Canada (n=146)
<b>Overall</b>	\$304.99	\$319.00	\$300.93	\$295.61	<b>\$255.23</b>
<b>Primary accommodations<sup>2</sup></b>					
Resort/Hotel/Motel/B&B	\$377.25	\$394.45	\$371.92	\$361.46	<b>\$318.78</b>
Campground/RV	\$202.38	\$212.77	\$196.79	<b>\$225.40</b>	<b>\$115.26</b>
Friends or Relatives	\$212.11	\$208.55	\$225.31	\$217.74	<b>\$188.42</b>
Second or rental homes/Timeshares	\$359.52	\$349.64	\$343.29	<b>\$420.00</b>	<b>\$475.00</b>
Other	\$283.10	<b>\$342.50</b>	\$261.43	\$267.50	<b>\$77.50</b>
<b>Travel party size<sup>3</sup></b>					
1 person	\$173.93	\$177.04	\$174.58	<b>\$202.83</b>	<b>\$118.13</b>
2 people	\$281.72	\$290.94	\$288.76	\$274.98	<b>\$231.49</b>
3-6 people	\$350.02	\$356.72	\$343.94	\$345.30	\$328.67
7 or more people	\$446.82	\$481.00	<b>\$303.33</b>	\$450.00	-
<b>Age<sup>4</sup></b>					
Under 24 Years	\$258.07	<b>\$328.40</b>	<b>\$209.41</b>	<b>\$228.33</b>	<b>\$147.50</b>
25-34 Years	\$303.67	\$308.46	\$316.81	\$309.23	<b>\$219.78</b>
35-44 Years	\$285.26	\$295.85	\$272.57	\$258.96	\$278.53
45-54 Years	\$348.20	\$360.67	\$340.43	\$348.11	<b>\$304.73</b>
55-64 Years	\$306.08	\$313.00	\$296.20	\$301.69	\$306.57
65 Years or Older	\$246.76	<b>\$286.87</b>	<b>\$274.40</b>	<b>\$206.29</b>	<b>\$150.36</b>

1. The top and bottom 2% of responses were trimmed to ensure an accurate mean daily expenditure. Practical differences of + or - 10% of dollar value between respondents from specific origins as compared to all leisure travellers have been colour-coded.

2. Valid sample sizes for primary accommodations: Resort/Hotel/Motel/B&B n=738; Campground/RV n=245; Friends or Relatives n=368; Second or rental homes/Timeshares n=121; Other n=21.

3. Valid sample sizes for travel party size: 1 person n=67; 2 people n=865; 3-6 people n=538; 7 or more people n=33.

4. Valid sample size for age: Under 24 years n=57; 25-34 years n=284; 35-44 years n=280; 45-54 years n=398; 55-64 years n=324; 65 years or over n=127.

Looking at high interest compared to low interest wine travellers revealed that high interest wine travellers reported considerably higher spending. On average, high interest wine travellers reported spending \$356.71, whereas those for whom wine touring was less important in trip planning reported average daily expenditures of \$243.62 – a difference of \$113.09 per day.



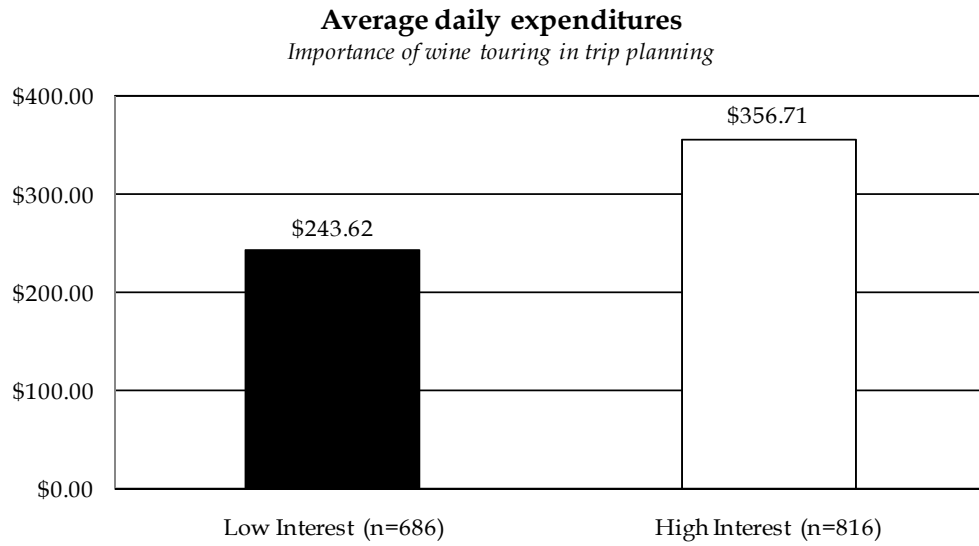


Figure 47. Average daily expenditures showing importance of wine touring in trip planning (low and high interest).

## Summary

### 1. Travellers who were interviewed at wineries in the Okanagan Valley:

- Were likely to be from British Columbia (51%),
- Were most likely to be over the age of 45 (59%),
- Were likely to have attained at least a university degree (54%) or at least a college diploma (75%),
- Were most likely to be travelling without children (74%),
- Were predominately living in adult only households (81%) and not travelling with children (86%),
- Were from high income households (52% earning \$100,000 + per year),
- Were not new to the wine touring experience (79% been wine touring before, averaging 2 wine touring trips in the past two years),
- Were most likely to rate themselves as either very satisfied (79%) or somewhat satisfied (13%) with their wine touring experience in the Okanagan Valley, and
- Were most likely to rate themselves as either very satisfied (89%) or somewhat satisfied (7%) with their overall trip to British Columbia.

### Trip characteristics of travellers at the Okanagan Valley wineries showed that:

- The primary trip purpose was leisure (72%), followed by visiting family/friends (27%),
- Cars/trucks/motorcycles were the primary mode of transportation for most travellers (94%),
- Resort/Hotel/Motel/B&Bs were the primary accommodation type (50%) followed by Friends or Relatives (25%),
- Over a half of the travellers (55%) stated wine touring was the primary reason (27%) or an important reason (28%) for their trip,
- The top three other wine and culinary activities (besides visiting a winery) during the trip were farmer's market/fruit stand (68%), driving a wine trail (64%) and fine dining/visiting a gourmet restaurant (59%),
- The three most frequent activities in other non wine/culinary related activities were shopping for local arts and crafts (55%), visiting parks (54%), and swimming/beach activities (37%),
- Nearly two-thirds (61%) of travellers started planning their trip between 3 – 12 weeks of departure,
- Most travellers choose the destination first and then the trip activities (i.e wine touring) when starting to plan their trip (47.5%),
- High interest wine travellers were more likely to consider visiting wineries first as a trip motivator and then select the destination when planning their trip (34%),
- 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,
- 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,
- The Okanagan Valley was the primary destination of the majority of travellers (76%), and travellers, on average, were spending 5.7 days (median = 4.0 days) in the valley.

- 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.

2. The profile of travellers can be applied:

- To ensure that the current information provided to wineries reflects the needs of wine travellers.
- For business planning of new and existing tourism businesses in the Okanagan Valley and Thompson Okanagan Tourism region. The data presented in this report provides details of the type of clients new tourism businesses in the region can expect particularly demographic characteristics, interests and trip planning behaviours of current and future clients who could be attracted through continued tourism marketing initiatives.
- The information collected about the mood, positive images and competitive advantage attributes provide clear evidence the beautiful, unique scenery set in a pleasant climate coupled with the ease of accessibility (proximity to family/friends) and good quality wine selection are key attributes that consumers have identified as competitive advantages and unique features of the Okanagan Valley as a tourism destination. These key attributes can be used for future tourism development and marketing activities in the region.
- Overnight leisure travellers also indicated that they were likely to consider the Okanagan Valley again for a future wine touring vacation. However, they also almost equally likely to consider the Vancouver Island and Gulf Island wine region as well as wine regions in the US (California) and overseas (France/Italy) as potential destinations for a future wine vacation. It is useful to understand the appeal and offerings of these destinations in order for the Okanagan Valley to continue to distinguish themselves and enhance its attractiveness as a tourism destination offering a high quality, wine touring product.

## Limitations

1. These results are representative of travellers who were interviewed at selected wineries in the Okanagan Valley between August 1<sup>st</sup> and October 12<sup>th</sup>, 2008. The results do not represent a profile of wine travellers to the Okanagan Valley for the whole year. While the sample of wineries included in this study was aimed to be diverse in operating size, geographic location and product offerings, it is acknowledged that these results may not be representative of the entire wine travel market in the Okanagan Valley. Applying these results to the remaining months in the year could over-estimate certain wine travel markets because the study was completed during the peak wine tourism season. In addition, trip and traveller characteristics of travellers at other times of the year could differ from those interviewed during the study period.
2. Some of the statistics contained within this report were produced with small sample sizes; consequently some of the results should be treated with caution.
3. Results presented here do not represent the full range of analysis that can be completed with the data collected. For example, a profile of travellers visiting friends and family versus those that were travelling for leisure could be developed. Please contact Alison Aspinall, Research and Planning Tourism British Columbia ([Alison.Aspinall@tourismbc.com](mailto:Alison.Aspinall@tourismbc.com)) for more information on obtaining custom reports using this data.

## Appendices

Appendix A - Interview Schedule and Interviews Completed

Appendix B - Questionnaires

Appendix C - Tour Group & Business Traveller Profiles

Appendix D - Response Bias Testing

Appendix E - Open-Ended Comments from Survey Participants

## **Appendix A – Interview Schedule and Interviews Completed**

Table A1. The day and number of travellers approached, the number who agreed to the interview, the number who participated previously, the number of residents, the number of refusals, the number travelling in a tour group and the number of independent tourists interviewed at each of the seven wineries during the study period.

	Travellers Approached	Agree to Interview	Refusals	Screened			Survey participants		
				Previous Participant	Residents	Incomplete surveys	Independent leisure <sup>1</sup>	Tour Group	Business <sup>1</sup>
Mission Hill									
Aug 01	41	17	24	0	0	0	16	0	1
Aug 06	45	26	19	0	4	0	22	0	0
Aug 08	34	20	14	0	1	0	19	0	0
Aug 12	16	4	12	0	2	0	2	0	0
Aug 18	41	11	30	0	0	0	10	0	1
Aug 24	54	41	11	0	9	2	30	1	1
Aug 30	32	22	10	0	4	0	10	7	1
Sep 05	47	38	9	0	6	0	20	6	6
Sep 11	26	19	7	0	0	0	18	0	1
Sep 13	36	28	8	2	4	0	10	8	4
Sep 17	23	19	4	0	4	0	14	0	1
Sep 23	28	24	4	0	6	0	17	0	1
Sep 29	23	14	9	0	3	0	11	0	0
Oct 08	25	23	2	1	7	0	14	0	1
Oct 11	23	14	9	0	3	0	11	0	0
Total	494	320	172	3	53	2	224	22	18
Elephant Island									
Aug 04	28	28	0	0	3	0	24	1	0
Aug 09	36	33	3	0	3	0	28	1	1
Aug 14	26	15	11	0	6	0	9	0	0
Aug 20	15	6	9	0	1	0	5	0	0
Aug 26	19	19	0	0	3	0	14	0	2
Aug 29	25	23	2	0	1	0	19	2	1
Sep 01	43	37	6	2	9	0	24	1	1
Sep 08	32	27	0	3	3	5	18	1	2
Sep 14	30	22	8	0	4	0	10	5	3
Sep 19	12	10	2	0	2	0	6	0	2
Sep 20	42	38	4	4	8	0	22	1	3
Sep 25	14	12	2	0	5	0	3	0	4
Oct 10	18	16	2	1	4	0	10	1	0
Oct 11	22	17	5	1	3	0	8	3	2
Oct 13	23	22	0	1	3	1	18	0	0
Total	385	325	54	12	58	6	218	16	21

<sup>1</sup>Residents and Tour Group participants are included in the final sample of tourists who responded to the intercept interview.

Table A1. Continued.

	Travellers Approached	Agree to Interview	Refusals	Screened			Survey participants		
				Previous Participant	Residents	Incomplete surveys	Independent leisure¹	Tour Group	Business¹
Soaring Eagle									
Aug 03	19	9	10	0	1	0	8	0	0
Aug 04	22	13	9	0	1	0	12	0	0
Aug 09	21	17	4	0	3	0	13	1	0
Aug 14	19	16	3	1	0	0	15	0	0
Aug 21	18	15	3	0	2	0	11	1	1
Aug 27	22	19	3	0	2	0	17	0	0
Aug 31	32	27	5	0	5	0	20	2	0
Sep 02	11	10	1	0	3	0	7	0	0
Sep 07	20	13	7	0	3	0	5	3	2
Sep 08	20	14	6	1	1	0	11	0	1
Sep 20	30	27	3	4	9	0	13	0	1
Sep 26	20	16	4	2	3	0	6	2	3
Sep 27	16	13	3	0	2	0	9	0	2
Sep 28	16	12	4	0	0	0	12	0	0
Sep 29	9	8	1	0	0	0	6	1	1
Oct 02	13	12	1	0	0	0	9	1	2
Oct 07	15	9	6	0	1	0	6	1	1
Oct 13	3	3	0	0	0	0	3	0	0
Total	326	253	73	8	36	0	183	12	14
Cedar Creek									
Aug 02	39	25	14	0	3	0	20	2	0
Aug 07	19	13	6	0	1	0	10	2	0
Aug 13	22	11	11	0	0	0	11	0	0
Aug 15	26	13	13	0	2	0	11	0	0
Aug 19	24	17	7	0	0	0	17	0	0
Aug 25	32	23	9	0	7	0	14	1	1
Aug 30	1	1	0	0	0	0	1	0	0
Aug 31	38	29	9	2	4	0	22	1	0
Sep 06	33	25	8	1	5	0	8	8	3
Sep 12	27	26	0	1	7	1	17	0	1
Sep 18	21	14	7	0	1	0	12	0	1
Sep 20	35	31	4	0	9	0	14	5	3
Sep 21	24	20	4	0	6	0	11	0	3
Sep 24	17	14	3	1	3	0	9	0	1
Sep 30	12	9	3	2	2	0	5	0	0
Oct 06	20	12	8	0	2	0	10	0	0
Oct 10	38	29	9	0	5	0	16	5	3
Total	428	312	115	7	57	1	208	24	16



Table A1. Continued.

Table A1: Continued.

	Travellers Approached	Agree to Interview	Refusals	Screened			Survey participants		
				Previous Participant	Residents	Incomplete surveys	Independent leisure <sup>1</sup>	Tour Group	Business <sup>1</sup>
Burrowing Owl									
Aug 02	40	28	10	1	5	2	22	0	0
Aug 07	49	35	10	0	2	4	33	0	0
Aug 13	45	33	11	0	4	1	29	0	0
Aug 19	44	32	11	2	0	1	29	0	1
Aug 21	41	30	8	0	1	3	29	0	0
Aug 25	41	30	10	0	0	1	30	0	0
Sep 06	47	36	8	1	6	3	29	0	0
Sep 12	24	19	5	3	3	0	9	1	3
Sep 18	34	28	5	0	1	1	24	0	3
Sep 24	34	28	5	4	4	1	15	2	3
Sep 26	32	29	3	2	5	0	19	1	2
Sep 30	26	24	2	1	7	0	12	0	4
Oct 06	33	28	5	2	1	0	21	0	4
Oct 12	54	51	3	3	3	0	43	0	2
Total	544	431	96	19	42	17	344	4	22
Nk'Mip									
Aug 01	26	18	8	0	3	0	15	0	0
Aug 06	33	23	9	0	1	1	22	0	0
Aug 12	35	27	8	0	1	0	26	0	0
Aug 18	44	24	19	0	3	1	20	1	0
Aug 27	37	32	5	2	3	0	23	2	2
Aug 30	51	35	14	1	5	2	28	0	1
Sep 02	28	23	3	1	2	2	19	0	1
Sep 05	44	35	8	2	5	1	25	1	2
Sep 11	38	24	12	1	2	2	21	0	0
Sep 14	34	25	9	0	2	0	22	0	1
Sep 17	29	26	3	2	2	0	20	0	2
Sep 23	27	22	4	0	2	1	20	0	0
Oct 05	46	31	14	1	6	1	19	0	5
Oct 08	29	27	2	1	5	0	20	0	1
Oct 14	26	23	3	2	4	0	14	0	3
Total	527	395	121	13	46	11	314	4	18

Table A1. Continued.

	Travellers Approached	Agree to Interview	Refusals	Screened			Survey participants		
				Previous Participant	Residents	Incomplete surveys	Independent leisure <sup>1</sup>	Tour Group	Business <sup>1</sup>
Tinhorn Creek									
Aug 03	45	33	7	1	5	5	27	0	0
Aug 08	41	32	7	0	5	2	26	0	1
Aug 15	25	22	2	0	2	1	19	1	0
Aug 20	46	34	11	2	3	1	27	0	2
Aug 26	38	28	10	2	2	0	23	0	1
Sep 01	23	20	3	1	4	0	14	0	1
Sep 07	38	31	4	2	6	3	20	0	3
Sep 13	44	35	8	2	9	1	21	0	3
Sep 19	33	28	5	2	3	0	18	1	4
Sep 25	20	17	2	0	3	1	11	0	3
Oct 01	30	24	6	4	1	0	18	0	1
Oct 07	44	34	9	3	4	1	20	0	7
Oct 11	60	44	15	3	8	1	28	0	5
Total	487	382	89	22	55	16	272	2	31
Overall	3,191	2,418	720	84	347	53	1,763	84	140

1. Included above are 10 surveys conducted with travellers who travelled for 365 days or more (independent leisure travellers n=6 and business travellers n=4). These participants were deemed to be local residents and their responses removed from the analysis above.

## Appendix B – Questionnaires

## **Appendix B - Interview Questions**

Interviewer \_\_\_\_\_

Date \_\_\_\_\_

OKANAGAN VALLEY CODE \_\_\_\_\_

**Good morning / afternoon / evening. My name is \_\_\_\_\_ and I'm conducting an interview on behalf of the Tourism British Columbia. We are interested in speaking with travellers about their travel experiences in the Okanagan Valley.**

1. Would you have approximately six to eight minutes to answer some questions? If you participate, we would like to give you a complimentary gift for your time.

☐ YES ☐ NO

2. Have you or anybody in your travel party been previously interviewed at an Okanagan Valley winery on this trip? (Refer to map to show participating wineries).

☐ YES ☐ NO

4. Where do you live (usual place of residence)?

Province \_\_\_\_\_ OR State \_\_\_\_\_ OR Country (other international) \_\_\_\_\_

**IF FROM BC** 5. Where in BC is your usual place of residence? Is it: (Refer to map for locations)

☐ OKANAGAN VALLEY (END INTERVIEW SCRIPT) ☐ METRO VANCOUVER/FRASER VALLEY ☐ VANCOUVER ISLAND ☐ ELSEWHERE IN BC

**IF FROM AB** 5. Where in AB is your usual place of residence? Is it:

☐ EDMONTON ☐ CALGARY ☐ ELSEWHERE IN AB

6. Are you part of an organized tour group? **Go to Box 1.**

☐ NO ☐ YES

#### **BOX 1. ORGANIZED TOUR GROUP TRAVELLERS**

▪ What type of tour are you part of today?

☐ DAY WINE TOUR ☐ MULTI DAY WINE TOUR ☐ DAY GENERAL TOUR ☐ MULTI DAY GENERAL TOUR

▪ What is the name of the tour company?

\_\_\_\_\_ ☐ DK/NR

▪ What is the total time you will spend in the Okanagan Valley on this tour?

\_\_\_\_\_ Hours or \_\_\_\_\_ Days ☐ DK/NR

▪ On this tour, how many wineries and/or wine tasting rooms will you visit in the Okanagan Valley?

\_\_\_\_\_ ☐ DK/NR

▪ What components were included in your tour package? (Check all that apply).

☐ ACCOMODATION ☐ MEALS ☐ ENTERTAINMENT ☐ SPA ☐ RENTAL CAR  
☐ WINE TASTINGS ☐ AIR TRANSPORTATION ☐ OTHER TRANSPORTATION ☐ OTHER \_\_\_\_\_

▪ In Canadian dollars, excluding expenses for the tour, what do you expect your travel party's total expenditures to be in the Okanagan Valley? (For American respondents approx. \$1CDN = \$1 US)

\$ \_\_\_\_\_ ☐ DK/NR

• Is this the first time you have gone wine touring?

☐ YES **END INTERVIEW** ☐ NO **GOTO NEXT QUESTION**

• **If no**, Have you visited wineries in other parts of BC? If so, where?

☐ YES (SPECIFY) \_\_\_\_\_ ☐ NO ☐ DK/NR

**That completes the interview. Thank you for participating!!**

**To start, we have a few questions about your current trip.**

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

☐ LEISURE ☐ VISITING FRIENDS & FAMILY  
☐ WORK/BUSINESS ACTIVITY (**Go to BOX 2**) ☐ OTHER (SPECIFY: \_\_\_\_\_) ☐ DK/NR

Interviewer \_\_\_\_\_

Date \_\_\_\_\_

OKANAGAN VALLEY CODE \_\_\_\_\_

**BOX. 2 BUSINESS TRAVELLERS**

- How many days will be spent on business activities and how many days will be spent on leisure or other activities on this trip?  
\_\_\_\_\_ Business days **AND** \_\_\_\_\_ Leisure days
- Including yourself, how many people are in your travel party on this trip? How many are children under 18 and how many are adults? (Travel party includes individual who have the same itinerary and/or the same expenditures.)  
\_\_\_\_\_ Adult(s) + \_\_\_\_\_ Child(ren) (under 18) = \_\_\_\_\_ Total
- **If TRAVEL PARTY > 1** Are any members of your travel party only travelling for leisure purposes?  
☐ YES ☐ NO
- What is the likelihood that you will return to the Okanagan Valley for LEISURE in the next three years?  
☐ NOT AT ALL LIKELY ☐ NOT LIKELY ☐ SOMEWHAT LIKELY ☐ LIKELY ☐ VERY LIKELY
- Is this the first time you have gone wine touring?  
☐ YES ☐ NO
- **If NO**, Have you visited wineries in other parts of BC? If so, where?  
☐ YES (SPECIFY) \_\_\_\_\_ ☐ NO ☐ DK/NR

**That completes the interview. Thank you for participating!!**

8. What is your primary destination (place that you will spend the most time)?  
\_\_\_\_\_ ☐ NONE, TOURING ☐ DK/NR

9. Including the day you left your residence and the day you will return, how many days will you be away from your residence for this trip? \_\_\_\_\_ days (**Consult calendar; include day left and day returning**)

10. How many of those days will be spent travelling in British Columbia? \_\_\_\_\_ days

11. How many days will be spent in the Okanagan Valley? (**Consult regional map**) \_\_\_\_\_ days

12. What is your primary (most often used) mode of transportation while in BC on this trip?

☐ CAR/TRUCK/MC ☐ RV ☐ BUS ☐ BICYCLE ☐ OTHER \_\_\_\_\_

**Skip if Q.9=1** 13. Which of the following best describes your **primary** (most often used) type of accommodation on this trip?

☐ HOTEL/MOTEL ☐ RESORT ☐ BED & BREAKFAST  
☐ TIME SHARE ☐ CAMPGROUND/RV PARK ☐ SECOND HOME  
☐ FRIENDS OR RELATIVES ☐ OTHER \_\_\_\_\_

14. Including yourself, how many people are in your travel party on this trip? How many are children under 18 and how many are adults? (Travel party includes individual who have the same itinerary and/or the same expenditures.)

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

**OVERNIGHTERS** 15. In Canadian dollars, what was your travel party's total expenditure yesterday, including accommodation? (For American respondents approx. \$1CDN = \$1 US)

\$ \_\_\_\_\_ ☐ NONE ☐ BEGAN TRIP TODAY ☐ DK/NR

**DAY TRIPPERS** 15. In Canadian dollars, what will be your travel party's total expenditure today?

\$ \_\_\_\_\_ ☐ NONE ☐ DK/NR

Interviewer \_\_\_\_\_ Date \_\_\_\_\_ OKANAGAN VALLEY CODE \_\_\_\_\_

16. Which of the following statements best describes the importance of wine touring in planning this trip to the Okanagan? Wine touring:

- A. IS THE PRIMARY REASON FOR THIS TRIP  
 B. IS AN IMPORTANT REASON FOR THIS TRIP  
 C. PLAYED SOME ROLE IN PLANNING THIS TRIP  
 D. WAS NOT IMPORTANT AT ALL IN PLANNING THIS TRIP  
 E. DON'T KNOW/NO RESPONSE

17. Overall, how important was visiting <<INSERT WINERY NAME>> in planning this trip to the Okanagan Valley. Was it:

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

IF Q.16=B,C,D Q18. Was there another leisure activity, aside from wine touring, that was the primary reason for this trip? (RECORD RESPONSE, DON'T READ LIST)

\_\_\_\_\_ ☐ GOLF    ☐ CAMPING    ☐ BOATING    ☐ SPA/RESORT    ☐ DK/NR

19. Have you or do you plan on participating in the following activities while on this trip?

- ☐ GOLF    ☐ HIKING    ☐ CYCLING    ☐ VISIT A MUSEUM, HISTORICAL SITE    ☐ FINE DINING    ☐ VISIT A SPA

20. How many wineries and/or wine tasting rooms have you or do you plan to visit today?

\_\_\_\_\_ ☐ DK/NR

21. Including the ones you visit today, how many wineries and/or wine tasting rooms do you plan to visit during your time in the Okanagan valley and in total on your entire trip?

\_\_\_\_\_ Okanagan Valley **AND** \_\_\_\_\_ on Total Trip    ☐ DK/NR

**I would like to ask you some questions about your experience at <<Insert Winery Name>> today.**

22. Is this your first time visiting <<insert winery name>>?

- ☐ YES    ☐ NO

23. Did you plan to visit <<insert winery name>> before you left home on this trip?

- ☐ YES    ☐ NO

IF Q23=NO 23b. What prompted you to visit this winery?

\_\_\_\_\_

24. Before visiting <<insert winery name>>, were you aware of the wines produced here?

- ☐ YES **GO TO Q.25**    ☐ NO **GO TO Q.26**

25. Have you ever tasted the wines produced here before?

- ☐ YES    ☐ NO

26. During your visit did you...? (Check all that apply)

- ☐ TASTE WINE    ☐ BUY WINE    ☐ TAKE A GUIDED TOUR    ☐ BUY OTHER MERCHANDISE    ☐ EAT AT RESTAURANT

**Now I would like to ask a few more questions about yourself.**

27. Is this the first time you have gone wine touring?

- ☐ YES    ☐ NO

If NO, 28. Have you visited wineries in other parts of BC and/or outside of BC? If so, where?

- ☐ YES (SPECIFY) \_\_\_\_\_ ☐ NO    ☐ DK/NR

Interviewer \_\_\_\_\_

Date \_\_\_\_\_

OKANAGAN VALLEY CODE \_\_\_\_\_

29. In which of the following age category are you?

- |  |   |
|--|---|
| <input type="checkbox"/> A. UNDER 24 YEARS | <input type="checkbox"/> E. 55-64 YEARS       |
| <input type="checkbox"/> B. 25-34 YEARS    | <input type="checkbox"/> F. 65 YEARS OR OLDER |
| <input type="checkbox"/> C. 35-44 YEARS    | <input type="checkbox"/> G. DK/NR             |
| <input type="checkbox"/> D. 45-54 YEARS    |   |

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

- |  |  |
|--|--|
| <input type="checkbox"/> A. LESS THAN HIGH SCHOOL                | <input type="checkbox"/> E. UNIVERSITY DEGREE  |
| <input type="checkbox"/> B. HIGH SCHOOL                          | <input type="checkbox"/> F. MASTERS/PHD DEGREE |
| <input type="checkbox"/> C. SOME TECHNICAL COLLEGE OR UNIVERSITY | <input type="checkbox"/> G. OTHER              |
| <input type="checkbox"/> D. COLLEGE OR TECHNICAL DIPLOMA         | <input type="checkbox"/> H. DK/NR              |

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

- |  |  |
|--|--|
| <input type="checkbox"/> A. LESS THAN \$25,000 | <input type="checkbox"/> E. \$100,000-\$149,999  |
| <input type="checkbox"/> B. \$25,000-\$44,999  | <input type="checkbox"/> F. \$150,000 PLUS       |
| <input type="checkbox"/> C. \$45,000-\$64,999  | <input type="checkbox"/> G. PREFER NOT TO ANSWER |
| <input type="checkbox"/> D. \$65,000-\$99,999  |  |

32. Gender of respondent (*DO NOT ASK, RECORD*)

- ☐ MALE                      ☐ FEMALE

**33. As a follow-up to this interview, we would like to contact you after your trip to inquire about the rest of your trip to British Columbia. Participation would involve completing a questionnaire that will be emailed to you. In exchange, we are pleased to offer you a chance to win a digital camera value at \$300.00. All contact information will be kept confidential and only used for this study. Would you be willing to participate?**

- ☐ YES                      ☐ NO

34. May I have your email address? (*Alternate between mailing address & email address*)

\_\_\_\_\_ @ \_\_\_\_\_

**Thank you!**



## **Appendix B - Follow-up Questionnaire**



Please return your completed questionnaire in the enclosed postage-paid envelope to:

Tourism British Columbia  
Research and Planning  
3<sup>rd</sup> Floor, 1803 Douglas Street  
Victoria, BC Canada  
V8W 9W5



«ID\_number»

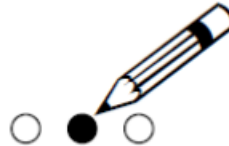
## Your opinions are important

*Thank you for participating in this survey. Tourism British Columbia is working to better understand your experiences, activities and impressions of your trip to the Okanagan Valley and British Columbia.*

*If you have travelled within British Columbia more than once this year, please tell us about the trip during which you were asked to participate in this survey.*

*Your responses and personal information will be kept confidential and used only for this survey.*

Please answer the survey questions by shading your answer using a pen or pencil. This will help us process the surveys accurately.



Please return your completed questionnaire in the enclosed, postage paid envelope to:



**Tourism British Columbia**  
**Research & Planning**  
**3<sup>rd</sup> Floor, 1803 Douglas Street**  
Victoria, BC  
Canada V8T 5C3



If you have any questions, please call  
(toll free) 1-877-877-8811 in North America  
or 1-604-660-6396 from elsewhere.

## About your trip....

*You agreed to participate in this research project while at a winery in the Okanagan Valley this summer. Your visit at the winery may have been part of a larger trip within British Columbia or just a day trip from your home. This section asks some questions about the characteristics of all of your time away from home.*

1. How many days did you spend away from your residence on this trip?

\_\_\_\_\_ day(s) away from residence

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 should be the same as your reply to Question 1.

\_\_\_\_\_ day(s) in British Columbia

4. What was your **primary destination** on this trip? Your primary destination is the place you stayed the longest or the place that immediately comes to mind as your destination when describing your trip. *Mark one response only.*

- ☐ Our primary destination was \_\_\_\_\_  
☐ We had no specific destination – we were touring around

5. When planning this trip, did you and/or your travel party consider other destinations or routes?

☐ Yes      ☐ No      ☐ Don't know

└─>Where? Please list up to three.

1. \_\_\_\_\_  
2. \_\_\_\_\_  
3. \_\_\_\_\_

6. In general, what made you and/or your travel party choose the destination or route indicated in Question 4?

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

## How did you plan your trip?

*This section asks some questions about how you planned your trip.*

7. How far in advance did you start planning your trip? *Mark one response only.*

- ☐ The day of the visit
- ☐ 1-6 days
- ☐ 1-2 weeks
- ☐ 3-8 weeks
- ☐ 9-12 weeks
- ☐ 13 weeks +
- ☐ Don't know

8. Apart from any cost or budgetary considerations, what did you consider first when planning your trip?  
*Mark one response only.*

- ☐ Thought about what destination to visit and then thought about visiting wineries
- ☐ Started by deciding to visit wineries and then started thinking about a destination
- ☐ Looked for package deals without considering any destinations, activities or travel experiences
- ☐ Considered something else first
- ☐ Someone else planned the trip
- ☐ Other \_\_\_\_\_
- ☐ Don't Know/Not Sure

9. What would you consider the main motivation for taking this trip? *Mark one response only.*

- ☐ To rest, relax and recuperate
- ☐ Because I have a passion for wine
- ☐ To experience the wine I buy from stores/restaurants at its own winery
- ☐ To spend quality time with family and/or friends
- ☐ To learn more about the wine making process
- ☐ To do something I always wanted to do
- ☐ To be closer to/experience the natural environment
- ☐ To experience intimacy and romance
- ☐ To experience different cultures and ways of life
- ☐ To visit a popular, trendy place
- ☐ To experience city life (e.g. nightlife, shopping)
- ☐ To experience adventure and excitement
- ☐ To enjoy the group experience
- ☐ Other (specify) \_\_\_\_\_
- ☐ Don't know



## 10. What information sources did you use to plan your trip?

**A.** What information sources did you use **before** your trip? *Mark all that apply.*

**B.** What are the **three most useful** information sources you used before your trip?  
*Mark the top three only.*

**C.** What information sources did you use **during** your trip? *Mark all that apply.*

Information sources	A Used before trip (mark all that apply)	B Most useful information (mark top 3)	C Used during trip (mark all that apply)
Have visited the winery before	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Past experience visiting wineries in the Okanagan Valley (other than the winery intercepted at)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Advice from friends/relatives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
1-800-HelloBC	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Internet Sites:			
www.HelloBC.com	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A local or regional tourism website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A winery website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A restaurant rating/review site (i.e. dinehere.ca, etc)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wine/culinary related website (i.e. winebc.com, bcculinarytourism.com, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Traveller review site (i.e. tripadvisor.com, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other Internet sites (other than HelloBC or local website)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Advertising on/in:			
TV	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Newspapers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Magazines	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Winery business brochures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tourism/Travel/Visitor Guides	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tour Operators/travel agents	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Visitor Centres	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Travel/consumer shows	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tourism specific business referrals (i.e. from an accommodation property)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Maps	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (specify) _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. We would like to know what wine/culinary-related activities you participated in while on this trip.

**A. What wine/culinary related activities did you and/or your travel party participate in while in the Okanagan Valley?** *Mark all that apply.*

**B. What wine/culinary related activities did you and/or your travel party participate in while on this trip (outside of the Okanagan Valley)?** *Mark all that apply.*

<b>Your wine and/or culinary activities</b>	<b>A</b> Participated in while in the <b>Okanagan Valley</b> <i>Mark all that apply</i>	<b>B</b> Participated in during this trip <i>Mark all that apply</i>
Attended a food or drink festival, fair or exhibition	<input type="radio"/>	<input type="radio"/>
Attended a special event at a winery (i.e concert, movie, dinner etc.)	<input type="radio"/>	<input type="radio"/>
Attended a wine tasting school or course	<input type="radio"/>	<input type="radio"/>
Attended a cooking school or course	<input type="radio"/>	<input type="radio"/>
Dined at a fine-dining/gourmet restaurant	<input type="radio"/>	<input type="radio"/>
Drove a wine trail	<input type="radio"/>	<input type="radio"/>
Stayed at an Inn/Resort because it had a gourmet restaurant	<input type="radio"/>	<input type="radio"/>
Experienced local or regional cuisine	<input type="radio"/>	<input type="radio"/>
Visited at:		
Farm(s)/orchard(s)	<input type="radio"/>	<input type="radio"/>
Farmers' markets or fruit stands	<input type="radio"/>	<input type="radio"/>
Specialty food producers (cheese, bakery, honey etc.)	<input type="radio"/>	<input type="radio"/>

12. We would like to know what other activities you participated in while on this trip.

**A. What other activities did you and/or your travel party participate in while in the Okanagan Valley?** *Mark all that apply.*

**B. What other activities did you and/or your travel party participate in while on this trip (outside of the Okanagan Valley)?** *Mark all that apply.*

<b>Your other activities</b>	<b>A</b> Participated in while in the <b>Okanagan Valley</b> <i>Mark all that apply</i>	<b>B</b> Participated in during this trip <i>Mark all that apply</i>
Shopped for local arts and crafts	<input type="radio"/>	<input type="radio"/>
Attended a festival, fair or exhibition (other than food/drink)	<input type="radio"/>	<input type="radio"/>
Attended or participated in a sporting event (other than golf)	<input type="radio"/>	<input type="radio"/>
Participated in:		
Swimming/beach activities	<input type="radio"/>	<input type="radio"/>
Golfing	<input type="radio"/>	<input type="radio"/>
Wildlife viewing (whale, bear, birds, etc.)	<input type="radio"/>	<input type="radio"/>
Fishing	<input type="radio"/>	<input type="radio"/>
Kayaking/canoeing	<input type="radio"/>	<input type="radio"/>
Boating/sailing (other than kayaking/canoeing)	<input type="radio"/>	<input type="radio"/>





<b>Your other activities (con't)</b>	<b>A</b> Participated in while in the <b>Okanagan Valley</b> <i>Mark all that apply</i>	<b>B</b> Participated in during this <u>trip</u> <i>Mark all that apply</i>
Mountain biking	<input type="radio"/>	<input type="radio"/>
Cycling (other than mountain biking)	<input type="radio"/>	<input type="radio"/>
Hiking	<input type="radio"/>	<input type="radio"/>
Rock climbing	<input type="radio"/>	<input type="radio"/>
Visited at:		
Municipal, provincial or national park, or natural area (outside of a park)	<input type="radio"/>	<input type="radio"/>
First Nations attraction or event	<input type="radio"/>	<input type="radio"/>
Museum, heritage or historic site	<input type="radio"/>	<input type="radio"/>
Casino	<input type="radio"/>	<input type="radio"/>
Family attraction (mini golf, zoo, etc.)	<input type="radio"/>	<input type="radio"/>
Spa	<input type="radio"/>	<input type="radio"/>
Other ( <i>specify</i> ) _____	<input type="radio"/>	<input type="radio"/>

**If you selected *Dined at a fine-dining/gourmet restaurant* in Question 11.**

- On this trip, when did you decide which fine-dining/gourmet restaurant(s) you would visit? *Select only one*  
☐ Only before the trip    ☐ Only during your trip    ☐ Both before **AND** during your trip

13. Which of the following best describes the importance of visiting a food/cuisine business (not including wineries) in motivating your trip to the Okanagan Valley? **Food/cuisine...**

- ☐ Was the primary reason for the trip    ☐ Was not important at all in planning the trip  
☐ Was an important reason for the trip    ☐ Don't know  
☐ Played some role in planning the trip

14. How many wineries (in total) did you visit on your trip? The Okanagan Valley includes all communities south of Enderby and north of (including) Osoyoos.

\_\_\_\_\_ wineries in the Okanagan Valley  
 \_\_\_\_\_ wineries outside of the Okanagan Valley

15. What were your travel party's total expenditures during the trip?

*Please include all purchases, taxes and tips except long-haul flights. If you pre-paid any items prior to leaving on your trip (e.g. accommodation, tours, etc.), please include these in your estimate.*

**TOTAL**    \$ \_\_\_\_\_ Canadian dollars

16. Approximately what percentage of your party's total expenditures was attributed to the following categories? Please fill in the appropriate proportions, **excluding long-haul flights**.

Categories	% of Total
Accommodation (hotels, motels, lodge, camping/RV fees, etc.)	_____ %
Transportation (short-haul flights within British Columbia, vehicle rental, gas, repairs, ferry, taxi, bus, etc.)	_____ %
Food & beverage (include any taxes and tips paid, excluding bottles of wine purchases)	_____ %
Wine (bottles of wine purchased from wine shops/wineries and not consumed on trip)	_____ %
Shopping (clothing, gifts, film, books, etc.)	_____ %
Attractions (admission, shows, tours, etc.)	_____ %
Outdoor recreation (park pass, nature guide, etc.)	_____ %
Other entertainment (spa, etc.)	_____ %
Other (specify) _____	_____ %
<b>TOTAL</b>	<b>= 100 %</b>

17. How many bottles of wine did you purchase and bring home with you from the Okanagan Valley?

☐ I did not buy any ☐ \_\_\_\_\_ bottles

18. We would like to know what travel services you booked/purchased **before** leaving on your trip and what travel services you purchased **during** your trip.

**A. What percentage (%) of each travel service did you book or purchase before your trip?**

*If you did not purchase/book that service before your trip, please enter zero (0%).*

**B. What percentage (%) of each travel service did you purchase during your trip?**

*If you did not purchase that service during your trip, please enter zero (0%).*

Travel services	Before trip A Booked before trip		During trip B Purchased during trip	
<b>Example:</b>	75%	+	25%	= 100%
Paid accommodation (hotels, motels, lodge, camping/RV, etc.)	_____	+	_____	= 100%
Transportation within British Columbia	_____	+	_____	= 100%
Permanent attractions (museums, theme/amusement parks, gardens, zoos, etc.)	_____	+	_____	= 100%
Events (festivals, concerts, etc.)	_____	+	_____	= 100%
Other activities (spa, recreational activities, etc.)	_____	+	_____	= 100%

19. In the future, which of the following would you be interested in attending at a winery in the Okanagan Valley? Mark the most appropriate response.

	Very Interested	Somewhat Interested	Neither	Somewhat Not Interested	Not at all Interested	Don't Know
Outdoor screening of a movie	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Live concert	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Food & wine pairing seminar	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Food & wine pairing dinner	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other (specify) _____	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## British Columbia as a wine touring destination....

20. What are the unique characteristics of **Okanagan Valley** as a wine vacation destination? Unique characteristics are those that make Okanagan Valley different from other destinations.  
Fill in up to three unique characteristics.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

21. What are the unique characteristics of **British Columbia** as a wine vacation destination? Unique characteristics are those that make British Columbia different from other destinations.  
Fill in up to three unique characteristics.

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_

22. What other destinations, both inside and outside of British Columbia, would you consider for future wine vacations? Please fill in up to three locations inside of British Columbia and three locations outside of British Columbia. Write in NONE if you are not considering another leisure trip that would include visiting wineries.

- |                  |                   |
|------------------|-------------------|
| <b>Within BC</b> | <b>Outside BC</b> |
| 1. _____         | 1. _____          |
| 2. _____         | 2. _____          |
| 3. _____         | 3. _____          |

23. In the next two years, how likely is that you will take another leisure trip that will include visiting wineries within British Columbia? Mark one response only.

Likelihood of another leisure trip that includes visiting wineries in...	Very Likely	Likely	Somewhat likely	Not Likely	Not at all Likely	Don't Know
Okanagan Valley	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Other regions in British Columbia	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## What did you think about your wine touring trip...

24. **A.** Please tell us how **important** each of the following factors were to you while planning, purchasing and while on your trip. *Fill in the appropriate response.*  
**B.** Then indicate how **satisfied** you were with each of these characteristics on your trip this summer. *Fill in the appropriate response.*

	A. Importance to me:					B. My satisfaction with:				
	Very important		Neither		Not at all important	Very satisfied		Neither		Not at all satisfied
<b>Planning for your trip...</b>										
Having a printed brochure from individual wineries	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Finding detailed information in printed brochures	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Finding detailed information about wineries in BC on websites	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Understanding the best time of year to go	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Understanding how I should prepare/what to bring	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Understanding the different kinds of wine tours and wineries available to visit	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Understanding the different varietals available at the wineries	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Understanding a winery's "wines in-stock" list	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Understanding what other people thought of past trips (testimonials)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>While purchasing your trip...</b>										
Ability to purchase/book tours online	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Offering packages with my trip including accommodation, transportation and/or other activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>While on your trip...</b>										
Staffs' level of wine knowledge	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Level of customer service at the winery	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wineries offering guided tours	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wineries offering food & beverage services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wineries offering retail services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Wineries offering accommodations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

25. Please compare the **quality, price and overall value** of a VQA bottle of wine from the Okanagan Valley to a comparable bottle of wine from the following regions using a scale of 1 to three where:

**1 = Okanagan Valley wine is Better, 2 = the Other Region is Better and 3 = No difference**

	Other regions in BC	Ontario	California	Europe	Australia	Chile	South Africa
Quality							
Price							
Overall Value							



## Satisfaction with your trip....

26. Overall, how satisfied or dissatisfied were you with your wine touring experience in the Okanagan Valley? *Mark one response only.*

- ☐ VERY DISSATISFIED
- ☐ SOMEWHAT DISSATISFIED
- ☐ NEITHER SATISFIED OR DISSATISFIED
- ☐ SOMEWHAT SATISFIED
- ☐ VERY SATISFIED
- ☐ DON'T KNOW

} → Please explain why.

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27. Overall, how satisfied or dissatisfied were you with your total trip in **British Columbia**? *Mark one response only.*

- ☐ VERY DISSATISFIED
- ☐ SOMEWHAT DISSATISFIED
- ☐ NEITHER SATISFIED OR DISSATISFIED
- ☐ SOMEWHAT SATISFIED
- ☐ VERY SATISFIED
- ☐ DON'T KNOW

} → Please explain why.

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## About you....

28. Excluding the trip we are asking about, how many overnight, leisure trips (to BC and other destinations) that included visiting wineries have you been on in the past 2 years? *Fill in the number of trips you have taken in the past two years where you visited a winery. If this was your first wine touring trip please fill in 0.*

\_\_\_\_\_ Wine touring trips in the past 2 years

29. What is the highest level of education that you have completed? *Mark one response only.*

- ☐ Less than high school
- ☐ High school
- ☐ Some technical college or university
- ☐ College or technical diploma
- ☐ University degree
- ☐ Masters/PhD degree
- ☐ Other (specify) \_\_\_\_\_

30. Do you have children under 18 living in your household? *Mark one response only.*

- ☐ YES
- ☐ NO

31. Who was in your immediate travel party on this trip? Please indicate their relationship to you, -their age and their gender. Start with yourself and fill in their relationship to you and their age.

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

32. Please share any additional comments about your trip in British Columbia or suggestions on what the province of British Columbia could do to enhance your tourism experiences?



**Thank you for your help!**

All completed surveys will be entered in a draw for a digital camera (value of \$300). The draw will be held in January 2009.

Please return your completed questionnaire in the enclosed envelope to:

**Tourism British Columbia**  
3<sup>rd</sup> Floor, 1803 Douglas St.  
Victoria, BC  
Canada V5W 9W5

## **Appendix C – Tour Group & Business Traveller Profiles**

## Traveller Characteristics - Tour group participants

The majority (91%) of organized tour group participants were taking part in a one day wine tour of the Okanagan Valley. This was true for all traveller origins and ranged from a low of 82% of participants from other Canadian provinces to 100% of travellers from Alberta. Caution should be used, however, when interpreting origin data as sample sizes for each location are low.

On average, wine tour participants spent less than one day in the Okanagan Valley during their tour. This number is a reflection of the number of participants who were involved in single day wine touring. The average time spent in the Okanagan Valley was slightly higher for those from other Canadian provinces and from outside Canada (1.1 and 1.3 days, respectively).

On average, tour group participants intended to visit 3.6 wineries or wine tasting rooms while on the tour. This number increased to 4.2 for those from other Canadian provinces. Average travel party expenditures were \$911.39 for all tour group participants. Interestingly, this number was lower for participants from other Canadian provinces (\$786.36), despite the fact that these individuals reported a longer time touring and more wineries on the trip. Again, however, caution should be used when interpreting this information as the sample size is small.

Table C1: Tour group participants: Profile by origin

	Tour Group Participants	
	Number	%
<b>Tour type</b>		
Day wine tour	76	90.5%
Multi-day wine tour	2	2.4%
Day general tour	2	2.4%
Multi-day general tour	4	4.8%
<b>Travel profile</b>		
<i>Average tour days<sup>1</sup></i>	0.84	
<i>Average wineries<sup>2</sup></i>	3.63	
<i>Average expenditures<sup>3</sup></i>	\$911.39	

1. Average number of days spent in the Okanagan Valley on the tour. Responses expressed in hours were converted to partial days.

2. Average number of wineries or wine tasting rooms visited in the Okanagan Valley on this tour.

3. Average expenditures for travel party in Okanagan Valley, not including expenses for the tour, expressed in Canadian dollars. Extreme responses have been trimmed from the analysis.

For nearly half of all organized tour group participants (46%) this was their first time on a wine tour, while the remainder 54% had been wine touring (formal/informal/individual or group) at some point in the past. As mentioned above, the majority of organized tour participants interviewed were participating in a single day wine tour and there were no practical differences among first time and repeat participants for those on this type of tour. Repeat wine touring participants were more likely to be engaged in a multi-day wine tour and a single day general tour, but again small sample sizes warrant caution.



There were no practical differences observed when comparing all tour participants with first time and repeat wine touring participants in terms of the time spent in the Okanagan Valley, the number of wineries included on the tour, and total expenditures.

Table C2: Tour group participants: Profile by first time and repeat wine touring participants

	All Visitors		First time touring		Repeat wine touring	
	Number	%	Number	%	Number	%
<b>Tour type</b>						
Day wine tour	76	92.7%	36	94.7%	40	90.9%
Multi-day wine tour	2	2.4%	0	0.0%	2	4.5%
Day general tour	2	2.4%	0	0.0%	2	4.5%
Multi-day general tour	2	2.4%	2	5.3%	0	0.0%
<b>Travel profile</b>						
Average tour days	0.84		0.88		0.81	
Average wineries	3.63		3.68		3.64	
Average expenditures	\$911.39		964.47		862.20	

Among those participants who had taken part in wine touring in the past, participants were most likely to indicate that they had visited a winery in another region in British Columbia (30%). This included 25% who indicated they had visited a winery in the Vancouver Island region and 9% who visited a winery in the Fraser Valley. Wineries in the US were also popular with 27% indicating they had visited a winery in the United States. All participants who had visited a winery in the US specified that they had travelled to a winery in California. International wine regions were visited by 23% of those who indicated that they had been wine touring in the past.

Table C3: Tour group participants: Other wine regions visited

	Number	%
<b>Other BC regions<sup>1</sup></b>	<b>13</b>	<b>29.5%</b>
<i>Vancouver Island</i>	11	25.0%
<i>Fraser Valley</i>	4	9.1%
<i>Other BC</i>	4	9.1%
<b>Canada<sup>2</sup></b>	<b>4</b>	<b>9.1%</b>
<i>Ontario</i>	4	9.1%
<i>Other Canada</i>	1	2.3%
<b>US</b>	<b>12</b>	<b>27.3%</b>
<i>California</i>	12	27.3%
<i>Washington</i>	7	15.9%
<i>Other US</i>	1	2.3%
<b>International</b>	<b>10</b>	<b>22.7%</b>
<i>Italy</i>	3	6.8%
<i>France</i>	1	2.3%
<i>Other Europe</i>	1	2.3%
<i>Australia / New Zealand</i>	7	15.9%
<i>Other International</i>	1	2.3%

1. Excluding wineries in the Thompson Okanagan region

2. Excluding British Columbia

Participants in organized group tours were asked to provide the name of the company that they were touring with. Three company names were mentioned most often and included Distinctly Kelowna Tours (24%), Top Cat Tours (24%), and Discover Okanagan (19%). An additional 18 tour group participants (22%) mentioned 17 other companies that included Napa North, Mason Tours, Nixdorf, Kettle Valley Wine Tours, Anderson Tours, Come Tour with Us, and Divine Valley Tours.

Perhaps not surprisingly, wine tastings were included as a component of the tour for virtually all tour group participants (96%). Other components that were frequently included were other transportation (i.e. group transportation between wineries; 53%), and meals (42%). A third of tour group participants indicated a component not included on this list.

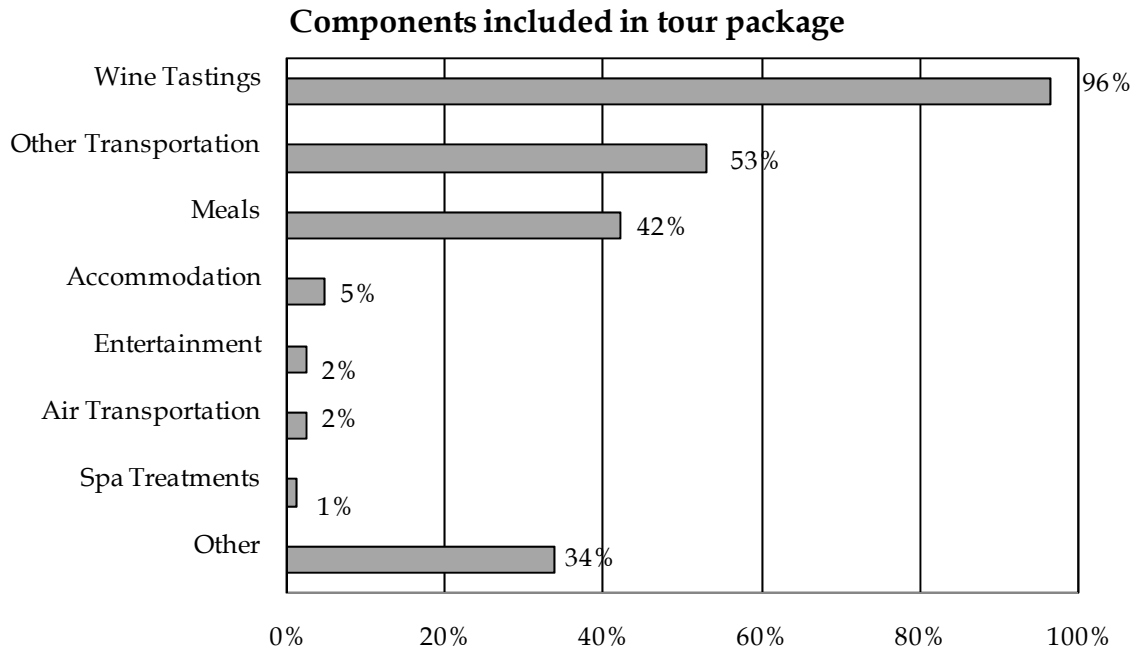


Figure C1. Percent reporting each component was included as part of tour package, organized tour group participants only.

#### Traveller Characteristics – Business Travellers

A total of 136 intercept participants (7% of the total sample interviewed) indicated that the primary purpose of their trip was for work or a business activity. Among those travelling for business, the majority (68%) were from British Columbia, with an additional 18% from Canadian provinces other than BC and 15% from outside of Canada.

Table C4: Business travellers: Origin

	Number	%
BC	92	67.6%
Other Canada <sup>1</sup>	24	17.7%
Outside Canada	20	14.7%
<b>Total</b>	<b>136</b>	<b>100.0%</b>

1. Due to small sample sizes of business travellers from Alberta (n=5), this category has been collapsed into Other Canada.

Overall, business travellers spent an average of 17.7 days away from home with the majority of their time on business activities (66% of the total days away from home or 13.3 days was spent on work or business related activities). This ranged from a low of 8.9 days away from home for travellers from British Columbia to a high of 62.3 days for those from other Canadian provinces. Small sample sizes among those from outside of British Columbia means that these numbers should be interpreted with caution.

Table C5: Business travellers: Trip duration by origin

	All Business Travellers	BC	Alberta	Other Canada	Outside Canada
Average days – business activities	13.26	6.49	18.40	47.05	10.53
Average days - leisure activities	5.51	2.47	2.60	20.95	5.42
Average days away from home	17.70	8.89	19.60	62.26	15.32
% of days spent on business activities	66.0%	64.4%	92.3%	62.1%	70.8%

The majority of the trips taken by business travellers were less than one week with 73% making trips of 7 or fewer days and 46% taking trips of 4 or fewer days. There was, however, considerable distribution in terms of the percent of the trip that was devoted to business as compared to leisure activities. For 37% of business travellers half or fewer of the total days away from home were dedicated to work or business activities, while the remaining 63% dedicated more than half of their time to business related activities. This varied by origin with residents of BC and those from other Canadian provinces more likely to include a higher percentage of their time to leisure activities and those from Alberta and locations outside Canada more likely to devote the majority of their time to work related activities.

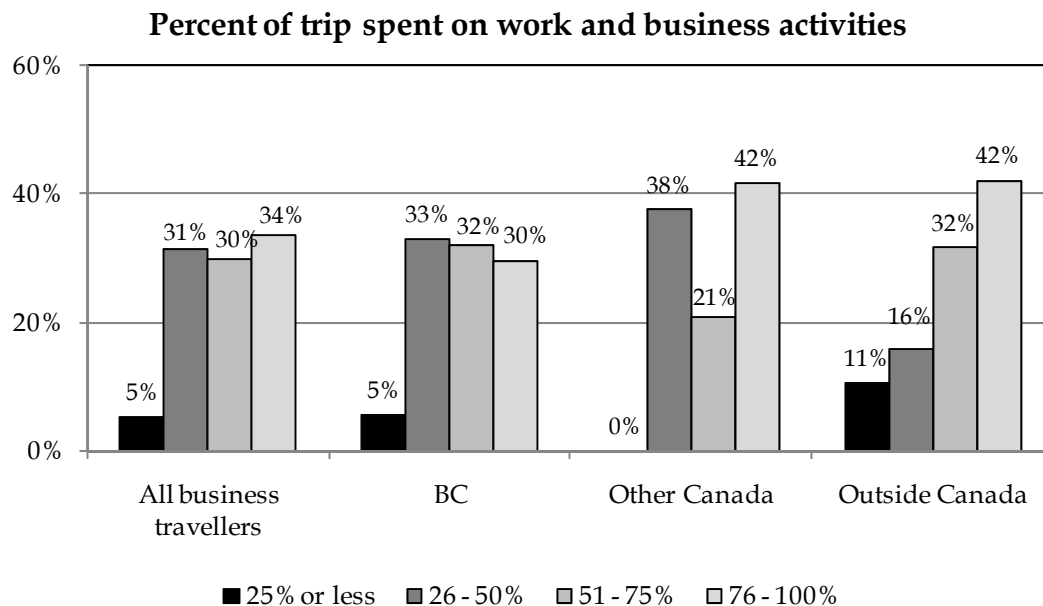


Figure C2. Business travellers: Percent of trip spent on work and business activities by origin

Among business travellers, the average travel party size was 2.1 persons with the vast majority (98%) travelling without children. Across all origins, 58% of business travellers were in travel parties consisting of two persons, while one quarter was travelling alone. This ranged from a high of 26% for business travellers from British Columbia and outside Canada to a low of 20% for Alberta. Overall,

57% of business travellers who were travelling with at least one other person indicated that there was at least one member of their travel party who was only travelling for leisure purposes.

Table C6: Business travellers: Travel party size by origin

	All Business Travellers		BC		Alberta		Other Canada		Outside Canada	
	n	%	n	%	n	%	n	%	n	%
One person	34	25.2%	24	26.1%	1	20.0%	4	21.1%	5	26.3%
Two people	77	57.6%	51	57.6%	4	57.6%	11	57.6%	11	57.6%
Three or more	24	17.3%	17	17.3%	0	17.3%	4	17.3%	3	17.3%
Average adults	2.08		2.11		1.80		2.21		1.89	
Average children	0.04		0.05		0.00		0.00		0.05	
Average party size	2.13		2.16		1.80		2.21		1.95	

The vast majority (82%) of business travellers indicated that they were either likely or very likely to return to the Okanagan Valley for a leisure trip in the next three years. Business travellers from British Columbia were most likely to return with 85% indicating that they were either likely or very likely to return. Business travellers from Canadian provinces other than BC and Alberta were the least likely to report that they would return, but even among these travellers nearly three quarters (74%) indicated that a return leisure trip with either likely or very likely.

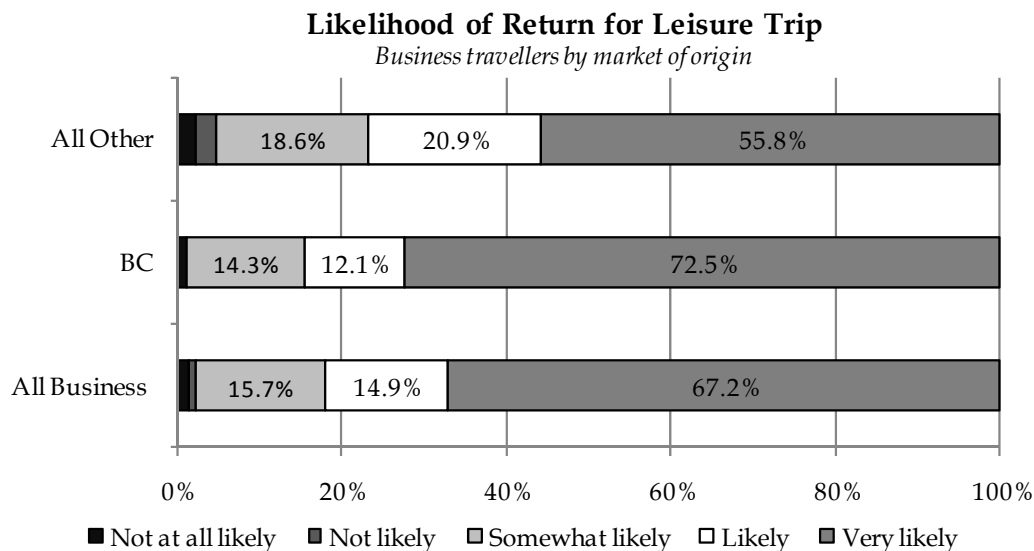


Figure C3. Business travellers: Likelihood of return by origin

The majority (83%) of business travellers intercepted at the wineries had participated in wine touring before. Those from Canadian provinces other than British Columbia and Alberta were most likely to be first time participants with 32% indicating that they had not participating in a wine tour in the past.

Table C7: Business travellers: First time and repeat wine touring participants by origin

	All Business Travellers		BC		Other Canada		Outside Canada	
	Number	%	Number	%	Number	%	Number	%
First time touring	23	17.2%	15	16.3%	6	26.1%	2	10.5%
Repeat wine touring	111	82.8%	77	83.7%	17	73.9%	17	89.5%

When asked about the location of the wineries they had visited in the past, 42% of business travellers indicated a winery location in British Columbia, including 29% who mentioned Vancouver Island and 15% who mentioned the Fraser Valley. A total of 23% indicated they had visited a winery in another Canadian province, while over half (51%) had travelled to a wine region in the US, especially California. Just under a third (30%) of repeat wine touring business travellers had visited a winery outside of Canada or the US.

Table C8: Business travellers: Other wine regions visited

	Number	%
<b>BC regions</b>	<b>47</b>	<b>42.3%</b>
<i>Vancouver Island</i>	32	28.8%
<i>Fraser Valley</i>	17	15.3%
<i>Other BC</i>	4	3.6%
<b>Canada<sup>2</sup></b>	<b>25</b>	<b>22.5%</b>
<i>Ontario</i>	22	19.8%
<i>Other Canada</i>	3	2.7%
<b>US</b>	<b>56</b>	<b>50.5%</b>
<i>California</i>	48	43.2%
<i>Oregon</i>	5	4.5%
<i>Washington</i>	13	11.7%
<i>Other US</i>	7	6.3%
<b>International</b>	<b>33</b>	<b>29.7%</b>
<i>Italy</i>	14	12.6%
<i>France</i>	19	17.1%
<i>Other Europe</i>	14	12.6%
<i>Australia / New Zealand</i>	9	8.1%
<i>Other International</i>	5	4.5%

1. Routing changes during data collection may have influenced the proportion of responses collected for this category
2. Excluding British Columbia

## Appendix D – Response Bias Testing

## **Response Bias Testing**

### **Methods**

The study design produced two unique sets of data with several components for analysis - the interview questionnaires at each of the seven winery locations, and the follow up surveys completed either as mailback or online questionnaires. Within these sets of data, the respondents and the responses could vary between the interview and follow up questionnaires and between the follow up questionnaires completed using the two methods. The respondents could differ because travellers could drop out of the study by not agreeing to complete the follow up questionnaire or by not completing the follow up questionnaire if they had agreed to complete it. Both instances could cause the follow up questionnaire results to be unrepresentative of travellers interviewed (non-response bias). Qualified travellers were randomly asked to participate in the follow up survey via traditional postal mailback methods or online methods, however, some participants chose to switch methods of participation. A total of 35 participants switched from mail to email, while seven switched from email to mail.

A series of tests were conducted to assess the follow-up questionnaires' representativeness or, in other words, if the follow-up questionnaire results portray the actual population of travellers interviewed. Similar tests were also conducted between the follow up surveys received via mailback and online.

Representativeness was assessed by:

1. Comparing demographics, trip and traveller characteristics between those who agreed and did not agree to complete the follow up questionnaire (Table A4).
2. Comparing demographics, trip and traveller characteristics between those who responded and those who did not respond to the follow up questionnaire (Table A4).
3. Comparing demographics, trip and traveller characteristics among responses received on the intercept and follow up surveys (Tables A4, A5).
4. Comparing demographics, trip and traveller characteristics between those who responded to the follow up survey using mailback and online methods (Table A4).

This analysis included only those respondents who were included among the potential pool of follow up survey participants only. Participants in tour groups and business travellers have been excluded from the comparison.

Responses to similar questions in the interview and follow up questionnaires could vary due to real differences in traveller behaviour (for example, a traveller may have anticipated a trip of a specific duration when they were interviewed but if the length of their trip differed this will be reflected in the responses on the follow up questionnaires). Therefore a series of questions were asked in the same way on both the interview and follow up questionnaires. Differences between responses to the two questionnaires were assessed by comparing responses to key questions that were asked in both the interview and on the follow up questionnaires (Table A5).



## **Results**

### **Differences in Respondents who Agreed or Did Not Agree to Follow up**

- There were no practical differences observed between participants who agreed to complete the follow up survey compared to those who did not agree.
- Travellers who agreed to complete the follow up were slightly more likely to be from British Columbia and less likely to have travelled from Alberta and outside Canada, but the differences were not practically significant.

### **Differences in Respondents that Completed/Did Not Complete the Follow Up Questionnaire**

- Among those who agreed to complete the follow up questionnaire, there were no practical differences observed between participants who completed or did not complete the follow up questionnaire.
- Participants who responded were slightly more likely to be age 45 or over. A total of 69% of those who completed the follow up questionnaires were in these age groups compared to 53% of those who agreed but did not respond.

### **Differences in Interview/Follow up Responses**

- Responses to the follow up surveys were consistent with the responses provided during the intercept interviews.
- Among those who completed the follow up survey, the largest difference was observed in the percent who reported travelling with children. On the follow up survey 91% indicated their travel party did not include children, compared to 89% on the intercept interview. This difference was not practically significant.

### **Differences in Follow Up Responses Received by Mailback or Online Methods**

- There were two related areas where practical differences were observed between the responses received from postal mailback compared to online methods. These were on total party size and the number who reported travelling with children. All travellers who completed the online survey indicated that there were no children in their travel party compared to 81% of those who completed the mailback survey. This difference was likely the root of the difference observed in total party size. Those who completed the postal mailback survey reported a total average travel party size of 3.0, compared to 2.6 among those who completed the follow up survey online.

## **Conclusions**

- Overall, the results of the response bias testing showed very few practical differences on all comparisons conducted.

Table A4. A summary of the comparisons between those that agreed to the follow-up questionnaire and those that did not, those that did and did not respond to the follow-up questionnaire, between the interview and follow up responses to matched questions, and the and between the email and mailback versions of the follow-up survey.<sup>1</sup>

	✓ Indicates a Practical Difference			
	Agreed to Follow-up <sup>2</sup>	Follow-up Responses (Non-Response Bias)	Interview / Follow-up Responses	Email / Mailback <sup>3</sup>
Origin	N	N	n/a	n/a
Gender	N	N	N	N
Age	N	N	N	N
Party Size	N	N	N	✓
Parties With Children	N	N	N	✓
Education	N	N	N	N
Days Away from Home	N	N	N	N
Days in British Columbia	N	N	N	N
Days in Okanagan Valley Region	N	N	n/a	n/a

1. Residents of the Okanagan Valley, tour group participants, and business travellers have been removed from this analysis.
2. Represents differences between respondents who agreed to participate in the follow-up survey and those who refused.
3. Variables used for comparison were from the follow up survey only.

Table A5. A summary of differences in data between the interview and follow-up questionnaires

Concept/Questions	Trip Characteristics Results		Practical Difference?
	Interview	Follow-up	
Mean Days Away From Home	10.04	9.96	N
Mean Days In BC	8.07	8.01	N
Mean Party Size	2.69	2.78	N
Age - Under 24 Years	1.69%	1.05%	N
Age - 25-34 Years	13.18%	14.11%	N
Age - 35-44 Years	16.01%	16.84%	N
Age - 45-54 Years	29.76%	27.58%	N
Age - 55-64 Years	28.63%	31.58%	N
Age - 65 Years or Older	10.73%	8.84%	N
Gender - Male	44.47%	43.28%	N
Gender - Female	55.53%	56.72%	N
Parties with Children	11.26%	8.63%	N

## Appendix E – Open-Ended Comments from Survey Participants

Participants in the follow up survey were invited to share comments in response to the question, “Please share any additional comments about your trip in British Columbia or suggestions on what the province of British Columbia could do to enhance your tourism experiences?” Comments are typed exactly as they appear in the follow up surveys – sentences were not corrected for spelling and grammar.

Comments are grouped into the general categories of ‘suggestions/need for improvement’, including suggestions or need for improvement in terms of information sources, transportation, facilities and amenities, price, and other; ‘positive experience’; and ‘other’.

Verbatim responses to the question, *"Please share any additional comments about your trip in British Columbia or suggestions on what the province of British Columbia could do to enhance your tourism experiences."*

### **Suggestions/Need for improvement – Information sources**

- A concise catalogue of available lodgings, eateries and wineries specific to each region would be highly valuable.
- After having travelled extensively in the last 4 years. I would have to say that the tourism board of New Zealand is the best out there. From a traveller's experience of their tourist offices, informative staff and excellent booking services. They really were flawless. It was so helpful that all the tourism offices were closely connected and you could book trips, etc. At an office across the country from the excursion. Now living back in BC, I would love to see this excellent service provided here for our tourists. Please note, as a gift, our friends paid for the accommodation.
- BC's wineries aren't well known outside Canada. We're from the U.S. and were pleasantly surprised at the high quality of the wines we tried. Maybe more marketing in the U.S.?
- Better availability of topographic/trail maps; organic winery development/support/publicity.
- Consolidate websites, i.e. one website for all B&B in the province or better yet one website for all accommodation.
- Descriptions of RV sites could be better. They were vague and inaccurate. They need to be rated like hotels (4 star, etc.). Only one travel guide had a rating of some RV sites. Easier access/more signage to cycling paths. Photos of RV sites in magazines/travel guides; 1 guide with map, photos and descriptions of wineries, RV sites, beaches, lakes and golf courses.
- Enjoyed my visit and wine tour to Penticton. Did not arrive at the "best" time for wine selection; would appreciate information on "best" time for wine tours. Still enjoyed my visit and friendly local people.
- Have the Visitor Information Centers right on the main highway, not off the road, and well marked with lots of parking
- I used past brochures from wine tasting grips to make some reservations. Make sure people have access and know where to get info to plan a trip. It was an awesome trip! Family and friends from US had no idea what to expect and that it would be as nice as it was
- If the liquor stores are government run and tourism is government funded why is there no linking of wine tourism in BC liquor stores? If buying BC wine in a government liquor store why is there not more information about each wine/winery to encourage people to buy BC wines as opposed to wines from other parts of the world? Signage for getting onto road 13 needs to be improved. Winery road signage is generally poor, if it is the major source of tourism it should be as easy as ABC to find wineries, not drive past them 3 times to find them. Are the people in the wineries trained to deal with customers, they may be good at making wine but to sell it and promote the region and BC they need to have a certain amount of general knowledge, they are tourism ambassadors. Not every tourist who visits Vancouver has time to visit to Okanagan, can something be done each summer near the cruise ship terminal to promote BC wines/ wineries.
- Improve signage for camping in Manning Park after Sept. 15. Make the camping website more user-friendly.
- It was extremely frustrating not having an all-in-one, all inclusive, one-page map showing how to find all wineries. Take a look at Niagara for a great example. We gave up trying to find some places, too much flipping back and forth in books. Wine is your major tourist attraction -- fund the printing of a decent map instead of trying to do it on the backs of advertisers!

- Local visitor guide information is weak on details. Should be broken into communities: Kelowna/Penticton/Osoyoos region and include fairly comprehensive listings on dining, shopping, activities, attractions, wineries, museums and galleries – all done in a concise objective manner. This would help a visitor understand, plan and make the best use of limited time.
- Love travelling in BC. Like to see illustrated maps at areas that point out local attractions.
- Loved the scenery, Was interested in the growing of the vines, how to prune, when to harvest, basically the knowledge of the different grapes. There were a lot of brochures available on the wineries but would also like info (printed) on the golf courses,
- mAYBE BETTER MAPS TO SHOW LOCATIONS OF THE WINERIES
- mention the holidays, and where people go at that time.
- More electrical connections in Provincial Parks.
- More information on off season rates and out of the way treasures.
- More information on website; update wine signs on road (i.e. more warning before exit!!); provide updated winery maps; dog friendly trips and suggestions.
- Preplanning web sites don't have enough seasonal weather information. Sites assume transportation by car but we use bicycles. Wineries not listed by type of product. Wineries not clearly listed by location on map with sufficient detail to plan trip. Poor restaurant information on web, except at a few (very expensive) resorts. Wine tourism centre in Penticton not well signed--hard to find when paying attention to traffic. Wine survey needs to include variety of product as a measure. Okanagan is far better in this category than California.
- Provide a complete service to find list of BC communities on the BC Tourism website that identifies and advertises the various festivals that go on in local communities. More multi-venue bus tours, even combine it with say a ride on the Kettle Railway or other similar attraction. Combined food and wine tasting bus tours or even with an overnight stay at a scenic out of the way vineyard maybe an interesting possibility.
- The Bed & Breakfast we stayed at was exceptional. BC needs to highlight these and where they are. Difficult to find info on most of them. Signage would assist plus a website that was advertised broadly.
- The most useful info we used is the typed sheets that the Penticton Wine center creates that is about three pages, lists all the wineries by distance to Penticton, their hours, tasting cost, whether you can picnic or eat in their restaurant. I wish I could access this ahead of time for trip planning. The wine center in Penticton is awesome!
- The natural beauty of and the varied outdoor activities available in the Okanagan far outweigh the quality of the local wine. However, the level of information about the former is far less than that of the wineries.
- The website for the festival was not complete and the quality was lacking and did not have much effect and almost a total negative effect on our decision to go through Kelowna. We only took the detour off Hwy 1 to Kelowna to fit in a quick wine tour which we had never done as a couple before. We would go back particularly during off wine festival season for packages, cooking schools, special events if the opportunities were marketed with a higher quality and good value. We are attracted to events in the States more for this reason. This particular trip was a road trip to Seattle for a concert. The same concert was also being held in San Francisco at a The Mountain Winery. We were considering flying or driving to CA for this concert because of the unique experience however due to timing, we drove to Seattle. We are in Calgary so short weekend trips to Kelowna anytime during the year would be great. We are NOT impressed with tourism/packa

- The wine festival website was very helpful with all its links, etc. We are not familiar with other regions in the province that would be appealing to visit for the same reasons, so perhaps a bit more advertising there? E.g. BCAA magazine, ads in newspapers. Just a thought. Wonderful 4 days, will be going again next year and bringing friends.
- This was our third visit and we will be visiting again. We may look at staying at Kelowna for 10-14 days. We liked it so much. If not already available, then mobile (cell) phone text information, i.e. instant access when visiting special areas/events might help.
- Tourism BC should publish region - specific restaurant guides with "third party" reviews.
- We found that the brochures varied greatly at each winery. Although told about a guide that listed special events throughout the wine festival at specific wineries we didn't encounter the brochure til almost our final destination - almost too late to plan to attend any of them. Although it may have been online we didn't locate it. We would likely have booked one of the dinners had we found it easier to locate the information.
- We had a very memorable time. The weather was perfect and the scenery amazing. As BC was not planned initially, we did things "on the fly" and found tourism Visitor Centers and hotel lobby pamphlets our main sources of information. We did have a hard time finding a reasonably priced motel in Vancouver. A readily available compendium of accommodations would have been helpful.
- We had to ask around at a couple of places for a map of the wineries. They were not available at the local specialty liquor store.
- We used the Thomson Okanagan 2008 Travel Guide and found it an excellent source of information. It would be helpful if there was more advertising done on TV. Our short trip was an excellent adventure. We thoroughly enjoyed ourselves and plan on travelling more in our home province. Explore BC!
- We were all impressed with the wineries, their education programs, the ability to taste the individual grapes on the vines and watch the harvesting and wine making process. I would recommend publicizing the interactive nature of the visits.
- Web site providing resources for route planning, specifying which wineries have meal services, and which provide picnic areas.
- would like more knowledge of price and availability on lodgings at the wineries also any special package deals

#### **Suggestions/Need for improvement - Transportation**

- An efficient shuttle service between the wineries would be nice so that you could do a self paced tour.
- Better investments in ferry service eg 5 hour delay experienced. Restore rail services to take advantage of famous scenery for visitors.
- Better roads, less construction during heavy tourism season information on OK Wineries available earlier in the year
- From Parksville to Victoria, the new Hwy needs attention; far too many stop lights! Part of the TransCanada Hwy system? - must drive visitors crazy.
- Having lived in Kelowna has been very helpful in getting around. It would be fun to have tour buses that travel to Naramata etc. for day tours. FUN!
- Local wine bus that moved along the wine trails would make it easier.
- Make the highways better to drive on at night especially when it's raining (ex. Cat eye reflectors).

- More “taxi” or “safe rides” to be available so both parties can enjoy the tasting experiences responsibly.
- non-stop flights from Ontario      no drop-off charge for rental cars
- Royal Okanagan Resort too far out to enjoy Kelowna restaurants in the evening. Road very winding and not one I would choose to drive after drinking.
- Sadly, very disappointed in the KVR railway cycling experience. The trail is in appalling condition for cycling, primarily due to the ATVs which have destroyed the trail.      With some concerted work, this can still be turned around and incorporated into an extended trip in conjunction with wine tasting in the Naramata / Penticton areas.
- We had a wonderful time on our trip. We had all been to BC before but the scenery is so amazing you don’t tire of it. The primary purpose of the trip was to tour around, stopping whenever someone wanted to and to visit family and friends. Only 1 of the 4 had been to the Okanagan before and so visiting some wineries seemed like a natural thing to do. My only suggestion, have road signs marking the mountains.
- We love travelling in BC. It is so diverse with so much to see. The highways could be improved.

### **Suggestions/Need for improvement – Facilities/Amenities**

- Casino in Osoyoos; 2) Upgrade Hwy 3 to 4 lanes (or increase number of passing lanes); 3) Disney like theme park for whole family.
- Advise tourist stops like Osoyoos to stay open past labour day. The business may not be as brisk as the through the summer, but we decided to take a trip late specifically to avoid the school aged children and noise, while still enjoying the area. You might also want to play up the fact that the golf was way more enjoyable after the "season" as the courses were not so backed up. It was my first golf / wine trip ever, and I have never had a better time in my life. I would recommend it again and again to anyone who would listen.....
- Better camping reservation system.      Better map information.
- Event targeted at younger crowd with not as much desire for expensive wines; just a “fun” event involving wines.
- I'm from Japan. I enjoyed my trip in Okanagan for 1 month.      I think many Japanese will come to Okanagan in the future.      So prepare institutions for foreign travelers.
- I don't think there is much you can do, but most every attraction (in Canada + ) closes down after Labor Day, a lot of seniors travel at this time. Had a great trip anyway.
- Improve the Passport Control section at Vancouver Airport
- In general, not just Okanagan related, keep your/our provincial campsites open, accessible, clean and affordable. It becomes a question of varieties. Generally, reds are overpriced in OK, whites are equal or better than some imports.
- It would be really great if you had free wireless at campsites. Kids would find out what is going on in the area. Parents could plan the next days trip if they had a map (Google map) to some interesting location that was talked about with other campers the night before. I would do it with the larger campsites and then campsites that are within a (not so expensive) wireless connection point. Believe me the wireless transmission technology has come a long way! Be on the cutting edge!!
- Make tourism destinations that are not “Disneyesque” experiences. Offer cultural, natural history learning centers where one can learn more about their own province.
- More restaurants directly within wineries!

- More wineries need to incorporate RV parks as accommodation. This has been done with orchards in different US states and is very inviting.
- more winery restaurants!!!
- Need higher quality hotels and restaurants in Osoyoos area.
- Need more friendly and experienced staff to work at the tourism booth at the airport, as they are usually the first people that tourists will talk to. Our experience at the airport was terrible!
- Nicer hotels; better restaurants and food; cheaper gas.
- Our only suggestion would be to have the wineries stay open later in the day.
- Over all I'm very satisfied with my trip; however, I would like to see some improvements in mannerism for some staff of wineries. Some are not even close to be ready to serve anyone. Very disappointed about those wineries.
- Please don't change the 'small town' flavour of the wineries in the OK Valley. We especially liked the simplicity of Oliver and the surrounding area.
- Provide life guards at busy beaches, e.g. Gyro. We heard about a natural park downtown in Kelowna by the canals, but it was poorly marked and very hard to find. We finally stumbled on it and it's lovely! One winery on the map had no road signs and when we found it, it was by appointment only; better if that's mentioned on list of wineries. It would be nice if wineries could sell their wines for less than stores.
- The growth in the industry has reduced the warmth of the experience. Wine Shop Staff is not as informed or passionate as before. Less contact with owners and winemakers, and at the same time higher prices.
- The only downside was the poor customer service from Air Canada at the Kelowna airport.
- The wine and cheese seminar in Kelowna was a WASTE of money would not recommend to any one. Hardly any wine, hardly any information and cheeses that we did not really get to understand because they were listed in the wrong order! Very disappointed. Wanted more info and more of everything! not handled well. Yikes. Maybe needs to be looked at differently. Thanks we enjoyed everything else.
- The woman at the Visitor Info. Center in Osoyoos was excellent, friendly and informative. The center itself was lovely; a very appropriate facility for such a beautiful area that showcases BC wines to the world. Perhaps a more thorough/rigorous training model would improve the ability of winery guides and respond to questions.
- There was a very unhappy retail person which made it no fun to go there. Lower Density Campgrounds would be nice, too. I'd rather pay a little more for a nicer experience.
- To have more campgrounds with showers and coin laundries.
- Using a wheelchair as my primary means of mobility, access was very important and it was disappointing to want to tour a winery in Osoyoos and be told it was not wheelchair accessible. It is my understanding that our Building Code now requires all public facilities to be wheelchair accessible.
- We attend a wonderful wine tasting in Portland Ore 2 weeks about in a wine shop at 5.30pm on a Friday evening. Clients sat at long trestle tables and 5 wines were tasted. Clients brought their own snacks. The cost was \$10 for very generous servings. We would have bought a case of the first wine we tasted but alas did not as we have a 2 bottle limit in Canada. It was a wonderful experience enjoyed by all who attended. - Someone should try it in the Okanagan.
- We had a great time visiting B.C. The area is so picturesque that it's easy to be there for any length of time. While at the wineries, we found that the level of customer service profoundly affected our 'taste' for the wines. If the wines were of less quality and the service was great, we felt



good about supporting the winery and promoting tours of their estates. Where the quality of wine was high but the service low, we often left without purchasing wine and telling our cohorts the same.

- We had an absolutely outstanding meal in Peachland (The Purple??). Wish there would be more places like it. Rather disappointed with the food scene in/around Penticton; it does not match the glorious wines and golf.
- We live in Western Australia and often visit the Margaret River wine region. Most wineries in M.R. have restaurant facilities. Wine prices are much lower than BC with excellent quality. Several larger wineries have excellent concert series each summer and are usually sold out well in advance. There is also a very popular "Spring in the Valley" (Swan Valley, Perth) which would be excellent in the Okanagan Valley.
- We need more camping spaces
- We were a bit disappointed that very few wineries in the Oliver/southern Okanagan offered tours during our stay in Oct. Also many were sold out and closed
- We were a little disappointed seeing the huge development. It overwhelmed the winery. Other than that, it was a perfect trip.
- Wineries really need to create a more family-friendly environment. We struggle the last 2 years visiting wineries because there are no babysitting services or drop-in child care. So those 9 wineries we visited in 2008 were with our young sons, 3 and 6 yrs old. Daddy outside minding the kids in parking lot and sometimes winery gardens while mom samples the wine and alternating mom and dad, breaking up our wine visits to about 2 per day.
- Would love to see electrical plug ins for RVs available at BC campgrounds. We like them but would be nice to plug in. Since we like to travel at times less busy having campgrounds open from early May to end of Oct. Is an asset. Kettle River is a favourite and we were happy to see it open late Sept.

### **Suggestions/Need for improvement - Price**

- Consider the economy & give bonus dollars to those who travel over 250 km during a week's stay
- Cost of ferry too high. Traffic Lower Mainland ridiculous.
- Disappointed with some prices but will continue to plan annual wine buying trip to Okanagan Valley. Actually, your survey does not place much emphasis on prices as a factor in tourists planning their trip to wineries. I would love to see pamphlets that provides both in stock wines and price list. As there is no discount in buying directly from winery and LC Board, I will go to wineries for tasting then purchase using LCB product data catalogue which provides a great service with no cost for bringing in orders to my local LCB store, which I can then pick up. Improve signage along roads directing tourists travelling by car to wineries, i.e. big roadside maps. I find the small brochures for Naramata wineries esp. Difficult to follow, also had to stop twice in Oliver to ask for directions. Winery maps were not detailed enough to show how to access road where it is located.
- I found the wines to be kind of expensive compare to the ones of similar quality. White wines, late harvest and ice wines are the best for me. Red wines some are good but in general they are too strong (too much tanins) for my taste. Other than that the experience was great !!
- I think that wine in BC should be less expensive. We are buying directly from the wineries, taking on the high cost of travel, it shouldn't cost so much.
- I'm sorry the price of gas was so high during the road trip. Lower gas prices please next summer 2009.

- Include affordable lodging for budget travellers.
- It was a fantastic trip. One thing that would aid Europeans visiting would be that the taxes (VAT) and where applicable the service charges are included in the price offered as in Europe – far easier and transparent.
- Lodging in Kelowna is expensive. It will definitely be a factor when planning our next trip. We had considered having a wedding in Kelowna but the cost of lodging changed our minds.
- lower ferry fares for Vancouver Island residents
- Lower the fee rates for tourists.
- Lower the prices. Wines from other regions are going to win based on price alone. BC wines cannot compete in the \$30-40 range.
- lower the wine prices
- More package deals need to be available for the Okanagan. Prices of local wines in liquor stores should be more affordable. Think if people could try more BC wines due to them having a better price point, people would be more inclined to visit the wineries.
- Never again. All wine tours – same garbage, “not in it for the \$\$\$ but for love of wine”. Extremely overpriced for the quality due to \$40 million renovations??? Greed and nothing best.
- not charge so much tax
- Offer rebates to BC residents who vacation in their own province
- One very bit item – you now have a law where you need to prepay for fuel at service stations. I know how this was done, but typical of BC, you went overboard in addressing the issues. Either have it only in effect during non peak (night) hours, or change the configuration of the pumps so that if you pay at the pump by credit card, you are not limited to a maximum of \$100 per transaction. This is itself is enough reason why I would avoid travel to BC and have discussed the issue with friends and co-workers. It resulted in several agreement and consensus.
- Prices for accommodations are high.
- Reduce price regulations/tax; free camping – tent areas (not fire pit); side of road. Too expensive.
- Reduce room taxes. Subsidize or support entertainment at wineries. Ensure BC wines are featured at Liquor Stores. Encourage restaurateurs to feature BC wine. Very disappointed in lack of featuring BC wine in Victoria’s restaurants and it’s the capital of BC. Shame.
- Reduce taxes on BC wines to remain competitive
- Remove the Prov. Sales Tax.
- Since we live in Victoria, the BC ferry service is our highway to the Mainland and should receive a greater subsidy so our ferry costs could be lower hence more travel off island. Think of Whistler’s Sea to Sky mess and how there is no tolls! Unfair totally to islanders. Amen
- The taxes on wine in BC are very prohibitive to purchasers outside of the Province. It is actually cheaper to buy Okanagan wines in Alberta than in BC. We go there to visit family and wine tour, but do most of our actual purchasing of BC wines in Alberta due to large savings on price. Our family from BC come to Alberta and actually purchase wines when visiting here as well, due to same reason. BC's taxes are prohibitive. This may ultimately decide negatively our research and wish to retire into the Okanagan Valley in 3 years. BC has 3 times the population of Alberta and taxes it's population for gasoline, wine, food, accommodation, provincial sales tax, etc. to the point where much as we like to visit, we may decide we can't live there. I was a resident of the lower mainland for 11 years, but can't afford to go back...
- The wines we purchased were less expensive in Alberta and much less expensive in the US prices at the wineries were a little on the high side.

- Tourist in your own town – It would be great to see incentives for British Columbians to travel in our own province. Most attractions are fairly expensive; you almost need a coupon book if you are a family of 4 trying to do something. Local travelling – better for the environment and helps our economy.
- We fell in love with the Okanagan in 1993 when we were travelling with our trailer and made an accidental turn at Armstrong and headed south instead of to Kamloops. We have been coming back ever since. The biggest complaint I have is the price of gasoline. I will never understand why gasoline in Kelowna costs up to 25 cents per litre more than a town like Trail or some of the small towns along the Yellowhead Trail. Obviously it costs much more to bring a tanker truck of gasoline to Kelowna than to some obscure town in northern BC. The price of fuel in BC compared to the rest of Canada would make us think twice about visiting if it wasn't for the fact that our daughter and family live there. In other words, we would travel to other places that are more affordable.

#### **Suggestions/Need for improvement – Other**

- allow wineries to ship wine we have purchased directly to us at home, so we don't have to drive it cross-country in less than optimal conditions
- More thoughtful stewardship and managed growth to preserve the special “super natural” areas – this may become just a slogan in future. Victoria is in danger of becoming depressed and overwhelmed with issues of poverty and homelessness – not conducive to tourism. Landscape and agriculture make BC special – these needs to be supported, not exploited. Travel party includes 10 other friends (5 couples aged 55-65).
- Most importantly, please try to ban ATVs from all parts of the Kettle Valley trail. We feel there are enough trails to do that activity around that and no need for those to be on the trail with bikers, hikers, especially families with children. It really bothers the authentic nature experience and destroys the trails for us bikers. Avoid over development and high pricing (at least keep the variety of choices as is). Thanks!
- My only disappointment with the trip was not being able to ship our wine home, at least our friends got to enjoy it. These are archaic laws
- Preserve the few remaining natural areas in the Okanagan.
- We enjoyed visiting beautiful BC but mostly the island of Victoria captivated us with its natural and quaint towns, e.g. Sydney. We would suggest to try to eliminate the beggars in Vancouver and make it a cleaner and welcoming downtown.
- WE were disappointed in the increase of noise and large RV's with generators running at the campsites and also in the lack of attention for the fantastic natural environment. It's hard to find really good wildlife- and birdwatching areas in the Okanagan while this area hosts a very large number of varieties according to the information I found on internet. At the tourist information in the Okanagan I didn't meet anyone who could be helpful and we would have appreciated a good naturally situated campsite in the hills surrounding the lakes.
- We wish wineries would “hold back” vintages to offer samples. We realize they want to make money, but if previous years were offered in tasting, it would give people a chance to see what this year's wine will taste like when it was ready for drinking.
- Wonderful place to visit, but stick to beer and imported wine

### Positive experience

- Always enjoy travelling to the Okanagan as it reminds me of Southern Spain (Almeria)
- Another key aspect for choosing the type of trip we did was the wide variety of B&B's in the Okanagan. Plus, there is a large selection that serves gourmet breakfast with a lake view. It's an excellent way to start the day.
- As our primary purpose was to visit family and friends, much of the questionnaire was not really relevant. However, the friends and family always enjoy visiting the wineries for tastings and purchases. We also enjoy many of the fine restaurants now located at many wineries. We didn't happen to eat at any this trip. Also. My wine purchases were modest because I live within a few blocks of a very good VQA wine store.
- BC is a beautiful province and we have always enjoyed our trips to BC including Vancouver Island.
- BC is beautiful and there is so much to explore! The sky is the limit!
- BC is wonderful with great local products. There seems to be an explosion of small wineries which is both good and overwhelming to choose.
- customer service everywhere was excellent
- Everything was wonderful and positive. People were polite and friendly. Everyone was helpful. Weather was great. Food and wine were exceptional. I wanna live there!!!
- Fun get together, there is so many wineries could visit every year and still not see them all, had a great time already planning a trip next year.
- Great place to visit. All individuals we met were friendly and helpful.
- great trip. If had more time, and baby was older would have visited more. we'll be back!
- I enjoyed my trip and plan on returning.
- I really don't have any other comments that it was a great holiday experienced for myself and friend.
- I was pleasantly surprise by the quality of OK wines! We are enjoying them. We plan to tour more wineries next year - May and August.
- In the past we have travelled on winery vacations to Niagara region and NY Finger Lakes. Okanagan wines are as good or better, scenery as well. All in all, we had a great trip and are planning to go back. I have mobility issues and thankfully found the trip easy from accommodation, the wineries (mostly) were accessible, the airport was great, Kelowna area easy to get around. Lots of stuff to do.
- It was a great experience to visit the wineries, near harvest time, as there was a lot of activities upcoming and you could see the mature grapes on the vines.
- It was a wonderful experience and I recommend it to anyone. A great girls' getaway and wine, food, spa and scenery is great for the soul.
- It was a wonderful trip. tourist info places were very helpful.
- It was a wonderful vacation! We will definitely be back to the Okanagan.
- It was great! From a BC born and bred resident (slightly prejudiced!!)
- It was part of an annual trip that my family has gone on for the past 10 years, The wine touring aspect has improved over the years.
- Just keep it as it is, it's great! Find this one very difficult. Wine experiences totally different due to grapes/climate, etc. Okanagan wines are hard to find in UK so we drink Australian and New Zealand predominantly.
- Keep up the good job
- Keep up the good work

- No complaints; wineries were well marked. BC is a great province!!
- NONE. IT ALMOST SEEMS PERFECT
- nothing to add. We all had a very good experience and will definitely do this again. Kelowna has some of the most beautiful wineries in the WORLD!
- Okanagan Valley is beautiful, scenery outstanding and the climate is great. I believe it will only get better and become world class.
- Okanagan Valley is beautiful, we enjoy going every summer, and every year make sure to take a list of favourite wineries, and get in a few new ones, always satisfied, always come home with lots to replenish the wine racks.
- Osoyoos was a lovely little town to visit, great weather, attractive, close to the wineries, very nice region
- Over all quite good.
- Relaxing
- Since I find that BC tourism is a highly efficient and professional industry, I can't offer much in the way of important, much less radical suggestions for change or improvement. Keep your present high level of delivery.
- Since I have a brother and sister-in-law (who works at a winery) I had a marvellous time and felt I was given extra special treatment.
- The beauty of British Columbia is stunning. People are friendly and helpful.
- The breath taking scenery and good roads made this a memorable and spiritual trip -- it was exactly what I needed and I look forward to seeing more of the interior or BC. My husband is from the west coast so there is rarely time to see the province amidst family visits, however with this solo trip other BC relatives have offered to come with me next time to share their favourite destinations and have a holiday together!
- The O.K. is a special place. Wineries have enhanced this valley.
- The residents of Oliver were very helpful and made you feel at home. Would love to live in such a friendly and beautiful community.
- The spectacular views of our great province during the four seasons. We have covered BC from E-W and N-S. Great for camping and enjoying the outdoors with family and friends.
- The Spirit Ridge resort is fantastic
- The weather for our trip was perfect. Sunny and warm, no rain.
- The wine trail map is excellent - good directions. Also good general accomo/dining brochures at the Visitors Centre in Vernon.
- The wineries in the Okanagan are fun. We will go back.
- This was our first leisurely trip to BC in a long time, travel to the province on business, but enjoyed having the ability to explore the province
- This was our first winery tour. Enjoyed it very much, learned a bit and will likely do it again even though we are not serious wine drinkers.
- Very happy with whole experience.
- Was perfect.
- We appreciate the road improvement project.
- we decided to travel through the mountains to Calgary. this seemed the best route.
- We dream about this trip many years ago. We did it and it's worth it. A DREAM.
- We found the residents of BC very friendly and helpful.
- We had a FANTASTIC time and look forward to another trip to Okanagan Valley Wine Region!!!!!!

- We had a lovely time, except for the trip to Silver Star. However, even that was “okay” because we had never been there and it looked interesting. The drive had some nice scenery as well. That same day we went to The Rise and were disappointed after all the hype, that clubhouse didn’t live up to expectations (I guess some day....). we loved the Jammery, and the market on the way to The Rise next to Planet Bee. The market had pumpkins made into “people” doing various activities, nice gift shop too! Although we didn’t begin our holiday with wine tours in mind, we’re smitten now and will do it again someday.
- We had an enjoyable time. We did more tastings of wine on this trip than in the past, which resulted in more purchases! However, having prior experience was useful; we were more prepared for what to do re arranging our trip. All in all, very good!
- We have discover that each time of year has its own brilliance. The Spring is when the wineries release there new vintages and it is the best time to buy. The fall is nice with the winefest and very busy and fun. Summer gives you more to do with the beaches and boating. We are looking forward to a winter trip to see what that has to offer.
- We love the are and go every two years to seek out newest wineries
- We met so many people working in the wine industry that had come from other places and never left because the Okanagan is so beautiful.
- we really enjoyed our time in BC, we covered a lot of area from Fairmont to Revelstoke to the Okanagan to chilliwack and finally Vancouver
- We travel to Penticton frequently so wineries are just a bonus for us.
- We try to go to Okanagan Valley for a wine tour twice a year. Every year we look forward to our trip(s) and every year we are not disappointed.
- We were delighted with the calibre of service, the quality of the wines and with the down-to-earth and unpretentious attitudes of the people making and selling their wines in the Okanagan Valley.
- While we are interested in wine, it is seldom the reason for our touring. We both enjoy British Columbia and Alberta for their beauty, adventure and the hospitality we encounter on our trips.
- will definitely go again in a heartbeat
- wonderful vacation, going back in 09

#### Other

- Don’t know enough wine from other countries to make a decision.
- I didn’t take a wine vacation. We went on a winery tour because it was an option and we had 2 spare hours. We are hikers not wine experts. We also went inside because it was air conditioned and we couldn’t take the 37°C heat!
- I’ve been on wine tours across BC, Napa and Australia and find BC wines are priced a little bit higher. BC wines are exceptional and I find that not too many people in BC are aware of how amazing they really are.
- It was great to go back to where I'd spent a lot of time growing up. I hadn't been back in over 15 years, and was amazed at how many things had changed. I was disappointed to hear from people around Okanagan Lake that there's a lot of development planned for the area, as I worry that it will take away from the beauty of the area as well as make it inaccessible
- Love Okanagan wines. In my humble opinion, they compete favourably and at times out class wines from anywhere in the world. We always travel in late September. Could you do something about getting us some warmer weather?
- Much of this questionnaire assumes the purpose of our trip was to visit wineries, but that was not the case. Our visit to wineries involved about 4 hours out of a 12 day trip.

- My initial planned trip was to see my son bike race and the wine tours were secondary. My second trip was as much for the bike race as my hope to tour more wineries! My next trip will always include trying to include as many wineries as I can.
- Our trip was not planned around a wine tour.
- We don't buy much wine to compare; usually BC wines we buy, local too!
- We stayed in our condo in Osoyoos
- While camping throughout BC, we found that the municipal and provincial parks were far nicer, cleaner, and less expensive than private campgrounds. There was plenty to see and do in BC. Awesome nature/wilderness trails.