



## **Kelowna Tourism Overview Report** **Prepared for the Kelowna International Airport**

### **Summary:**

The objective of this report was to provide an overview of tourism visits to the Kelowna Census Metropolitan Area (CMA) including demographic and behavioral data for Canadian and international visitor profiles for the years of 1996 - 2001. The primary data source for the study was Statistics Canada's Canadian and International Travel Surveys. However, data was collected from several sources including Tourism British Columbia's Tourism Indicators, Airport Passenger statistics, Kelowna International Airport Enplaning Passenger survey, IATA BSP tickets sales and Transport Canada.

The report indicated that visitor volumes to the Kelowna CMA have increased in the time period between 1996 and 2001, largely due to the growth of Canadian visitors. The majority of Kelowna visitors stayed at least one night on their trip.

Results from the report indicated that air mode visitors represent less than a quarter of visitors to Kelowna. Air mode visitors decreased from 2000 – 2001, however that does not account for visitors that fly into other destinations and use ground transportation to reach Kelowna. Kelowna International Airport (YLW) statistics showed there were more YLW inbound passengers than air mode visitors to the Kelowna CMA compared with Transport Canada data, indicating that visitors are using the airport to travel to other destinations in the region. In regards to the international and US markets, there are fewer YLW inbound passengers than visitors to Kelowna using air as an entry mode to Canada. This suggests that the remaining air mode visitors to Kelowna are using other Canadian airports to access the destination.

Automobile travel has increased in all markets from 1996 – 2001. Other non-air modes of transportation such as bus or boat are used by only a very small population and have decreased over the same time period in the overseas and US markets.

Data from Tourism Kelowna and Statistics Canada was used to estimate overnight visitors to the Kelowna CMA and indicated a difference of about 5 % between the two studies. Statistics Canada provided an estimate for same day visitors as well, which when combined with the overnight statistics indicated that total visitors to the Kelowna CMA in 2001 are estimated to be between 1.24 million and 1.31 million.

In regards to determining a visitor profile of our domestic visitors, the data generally reflected behaviors of all Canadian visitors not specifically for Kelowna, unless information for a CMA level was available and was indicated. In 2001, just under half of Canadians visiting Kelowna reported pleasure as their primary purpose, an increase over 1996. Other indications demonstrated a decrease in visiting friends and relatives and an increase in other travel for medical, education and weddings.

### **Profile of Canadian (Domestic) Visitors:**

- Total number of Domestic Visitors to Kelowna in 2001 was 1,102,000 people comprising 84% of our visitor volume
- Majority continue to use an automobile as their primary transportation mode, which is unchanged from 1996 through 2001
- Majority of visitors to Kelowna are from British Columbia
- Just under a quarter of our visitors were 45 – 54 years of age with the next largest group in the 25 – 34 age category
- Seasonality patterns in Kelowna seemed to be less pronounced in 2001 with the majority of visitors continuing to visit in the 3<sup>rd</sup> quarter of the year
- Same day visitors to Kelowna have increased, while stays greater than five days have declined since 1996
- Minimal shifts in trip level activities were observed between 2001 and 1996 with visitors enjoying activities such as visiting friends and relatives, shopping, sports or outdoor activities and sightseeing
- Average expenditure per visit was \$179 with most visitors spending less than \$200
- In Canada more families with children are travelling within the Country while our USA and overseas visitors tend to be adults only

### **Profile of USA Visitors:**

- Total number of USA Visitors to Kelowna in 2001 was 99,300 people, comprising roughly 8% of our total visitor volume
- Similar to Canadians, most USA visitors reported pleasure as their primary trip purpose in 2001, which had grown over 2000
- Approximately half of USA visitors in 2001 entered Canada via automobile, which was virtually unchanged from 2000 levels
- Just over one quarter of Americans entered via air transportation
- Visitors from Washington State were the largest group of USA visitors, followed by California and Montana
- The age of visitors from the USA was primarily in the 45 – 54 year range but was closely followed by those 55 – 64 and those 35 – 44 years of age
- As in 2000, 2001 USA visitors remained highly seasonal with over half visiting in the 3<sup>rd</sup> quarter of the year

- Of those that stayed overnight a 3 night stay was most frequently reported
- Over a quarter of visitors did not spend the night
- Main activities enjoyed by visitors from the USA included shopping, sightseeing, visiting parks, and visiting friend and relatives
- The average expenditure per visit was \$279 with the majority of visitors spending over \$500
- In contrast to the profile of Canadian visitors, those from the USA tended to travel in a party of two adults as opposed to visitor parties with children

### **Profile of Overseas Visitor:**

- Total number of Overseas Visitors to Kelowna in 2001 was 111,400 people, comprising 8% of our visitor volume
- Pleasure was again the primary purpose for our overseas visitors trip and this remained stable from 2000
- Over three quarters of overseas visitors to Kelowna entered Canada via direct air travel, again unchanged from 2000 levels
- The share of overseas visitors by world region remained reasonably consistent between 2000 and 2001 also, with European travellers comprising over half our total overseas visitors
- The age of overseas travellers was consistent with USA profile as well, with the majority falling in the 45 – 54 and 55 – 64 age category while those 35 – 44 followed closely behind
- Similar to USA visitors, overseas travel remained highly seasonal in 2001 with half reported visiting Kelowna in the 3<sup>rd</sup> quarter, which is consistent with visitor patterns in 2000
- Overseas visitors tended to stay overnight while visiting Kelowna with almost three quarters of the visitations one and two – night stays
- While in Kelowna the majority of overseas visitors enjoyed visiting parks, sightseeing, shopping and visiting friends and relatives
- Average spend for our overseas visitors was \$257
- Similar to the USA visitor profile, most overseas visitors travelled in a party comprised of two adults