

BC WINE INDUSTRY BENCHMARKING

August, 2016

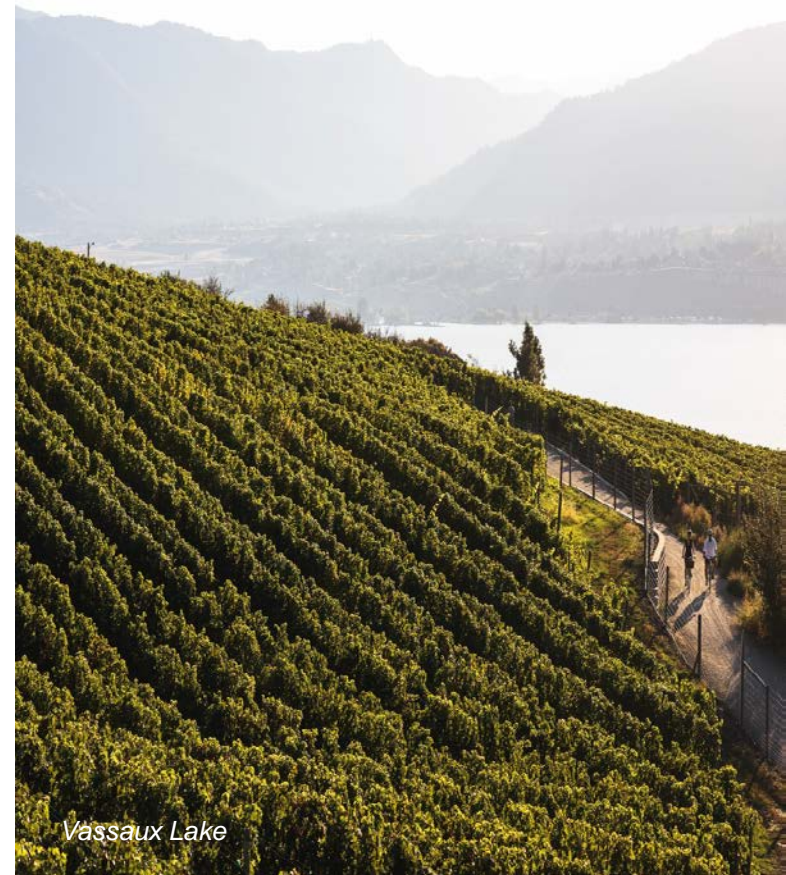
Okanagan Valley



DESTINATION
BRITISH COLUMBIA™

EXECUTIVE SUMMARY

- Overall, more than half of BC and AB residents consider BC an appealing destination for wine touring.
- More BC residents have experienced wine touring in the past two years compared to those in AB.
- About half of respondents experienced wine touring while they were on leisure trips. Notably a quarter of BC and one-sixth of AB residents who visited a wine touring destination in BC, mentioned touring as their primary motivation.
- Although the majority of BC and AB residents consider BC an appealing destination for wine touring, only about a third of them are likely to experience wine touring in the next two years.
- The majority of those who have experienced wine touring in the past two years are likely to experience another touring in the next two years.



Vassaux Lake

Background, Research Objectives and Methodology

Morning Bay Vineyards & Estate Winery,
North Pender Island

Background, research objectives and methodology

BACKGROUND AND RESEARCH OBJECTIVES

Background

The BC Wine Institute is collaborating with Destination BC to increase tourism visitations to the wine regions and direct from winery sales through a co-operative marketing partnership. By 2020, the marketing effort will help increase Kamloops, Kelowna, Penticton and Osoyoos hotel revenues to \$177 million and increase BC winery direct sales across British Columbia by 5% in litre sales. This research was initiated to help benchmark the following metrics in BC and Alberta: The current incidence of visitation to BC for wine touring, the primary motivation for trips that included wine touring, the appeal of BC as a wine destination, and the likelihood of wine touring in BC in the next two years. Providing a benchmark for these measures will help the BC Wine institute and Destination BC gauge the success of the 2016 marketing initiatives, which are being supported by Destination BC through co-operative marketing funding.

Research Objectives

1. Explore chosen wine touring destinations in the past two years.
2. Understand the primary motivation for trips that included wine touring.
3. Investigate the appeal of BC wine tours among BC and AB residents.
4. Explore the likelihood of wine touring visits to BC in the next two years.

Methodology

An online survey was launched in BC and AB using Google Consumer Survey platform, aiming for 1,000 responses in each province. Results are weighted to represent the general internet population of BC and AB. The questionnaire used in this research is included in the appendix of this report.

Findings

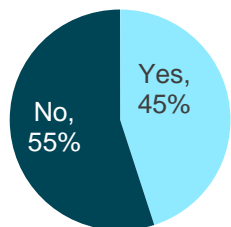
Naramata Bench

Wine touring

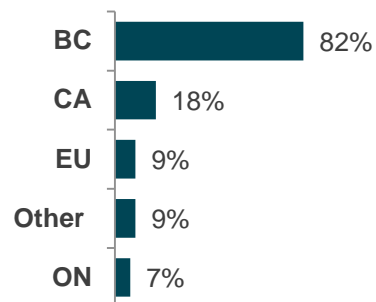
Overall, wine touring is more common among BC residents. Just less than half have experienced wine touring within the past two years (45% for BC vs. 34% for AB residents). Notably, BC is the most visited destination for wine touring (82% for BC vs. 68% for AB residents).

BC

Have Experienced Wine Touring in Past Two Years

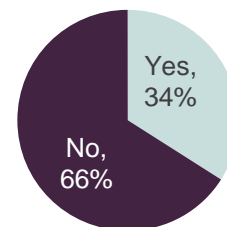


Wine Touring Destinations Visited

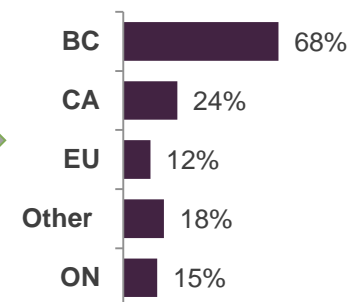


AB

Have Experienced Wine Touring in Past Two Years



Wine Touring Destinations Visited



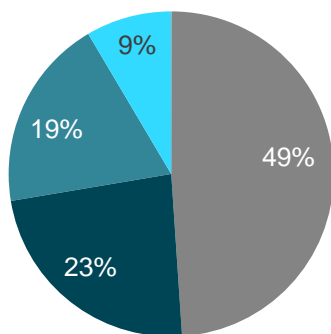
Q1. Have you experienced wine touring (i.e. visiting multiple wineries and sampling wines) during a trip to any of the following places in the last two years?
(BC: n=1,204, AB: n=1,226)

Primary trip motivator

About half of respondents experienced wine touring while they were on leisure trips (49% of BC and 51% of AB residents). Notably about a quarter of BC and one-sixth of AB residents who visited a wine touring destination in BC, mentioned touring as their primary motivation (23% of BC vs. 15% of AB residents).

BC

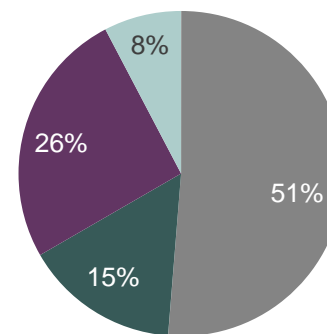
Primary Motivation for Trips that included Wine Touring



- Leisure
- Wine touring
- Visiting friends & relatives
- Business/work

AB

Primary Motivation for Trips that included Wine Touring



- Leisure
- Wine touring
- Visiting friends & relatives
- Business/work

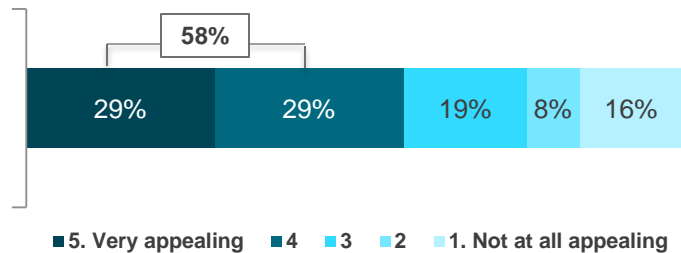
Q2. On trip(s) where you experienced wine touring, what was the primary motivation for the trip(s)?
(Those who have experienced wine touring recently – BC: n=523, AB : n=443)

Wine touring In BC

Overall, more than half of respondents consider BC as an appealing wine touring destination with slightly higher preference by BC residents (58% for BC vs. 51% for AB residents). This finding shows that lower wine touring visits by AB residents might be due to reasons not related to the appeal of BC, such as higher travelling costs or longer distances.

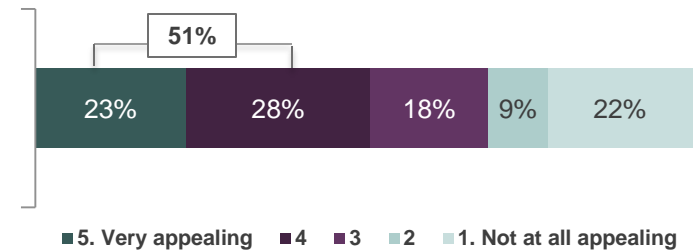
BC

Appeal of BC as a Wine Touring Destination



AB

Appeal of BC as a Wine Touring Destination



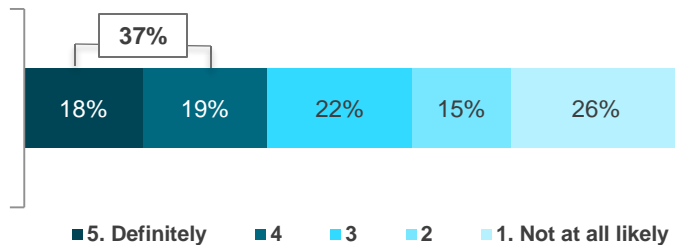
Q3. In your opinion, how appealing is British Columbia as a **Wine Touring** destination?
(BC: n=1,065, AB: n=1,075)

Likelihood of Wine touring In BC

Despite the high appeal of BC as a wine touring destination, less than two-fifths of those in BC and one-third of those in AB are likely to experience touring in the next two years. Notably, about two-thirds of BC residents and just less than half of AB residents who have experienced wine touring in the past two years are likely to participate in wine touring in BC in the next two years. Indicating high satisfaction with the previous tour experience.

BC

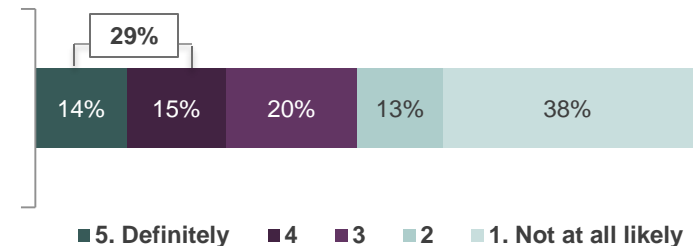
Likelihood of Wine Touring in BC in Next Two Years



65% of those who have experienced wine touring in BC in the past two years are likely to participate in wine touring in BC in the next two years.

AB

Likelihood of Wine Touring in BC in Next Two Years



46% of those who have experienced wine touring in BC in the past two years are likely to experience wine touring in BC in the next two years.

Summary

BC



- ✓ 37% of BC residents have experienced wine touring in BC in the past two years.
- ✓ Out of those, 23% mentioned wine touring was the primary motivation for their trip.



- ✓ **58% of BC residents consider BC an appealing wine touring destination.**



- ✓ 37% (which is approximately 1,400,000 BC residents) are likely to experience wine touring in BC in the next two years.
- ✓ 65% of them have experienced wine touring in BC in the past two years.

AB



- ✓ 23% of AB residents have experienced wine touring in BC in the past two years.
- ✓ Out of those, 15% mentioned wine touring was the primary motivation for their trip.



- ✓ **51% of AB residents consider BC an appealing wine touring destination.**



- ✓ 29% (which is approximately 900,000 AB residents) are likely to experience wine touring in BC in the next two years.
- ✓ 46% of them have experienced wine touring in BC in the past two years.