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## Who We Are

- **Tourism Kelowna** is a not-for-profit, stand-alone Society incorporated in 2008 under B.C.'s *Society Act*.
- Tourism Kelowna's mandated service area is the Kelowna Census Metropolitan Area (Kelowna CMA) which covers the Regional District of the Central Okanagan including the communities of Kelowna, Lake Country, West Kelowna, Peachland, Westbank First Nation, and Okanagan Nation Alliance.
- A mid-size Destination Marketing Organization (DMO).
- The City of Kelowna's designated service provider for destination marketing and visitor servicing.
- The District of Lake Country's designated service provider for destination marketing.
- Guided by a Board of Directors, comprised of elected and appointed members.
- 10 full-time staff, nine part-time staff, and three consultants.
- Represents local tourism businesses, including 400+ stakeholders.

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## Mission

To support and market the tourism destination of Kelowna (census metropolitan area) in a sustainable manner that strengthens the local economy and enriches the quality of life; and to seek funding opportunities and manage funding for the support and marketing of tourism in the Kelowna census metropolitan area.



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## Who We Serve

- **Residents:** creating citizen ambassadors who embrace the value of tourism for sustainable and regenerative growth.
- **Stakeholders:** 420+ tourism businesses who have directly invested advertising dollars in Tourism Kelowna's marketing & advertising programs.
- **Visitors:** inspiring and attracting 1.8 million travelers annually, promoting local spending and return visits.
- **Industry:** Hospitality and tourism businesses and organizations who indirectly rely on our destination marketing efforts.



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## Strategic Plan – 2019-2023

### Strategic Priorities:

- Increase high-value visitation
- Grow in-destination spending
- Strengthen sustainable growth of the destination



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## Strategic Plan – 2019-2023

### 2022 Objectives

- Kelowna and area recognized as a sought after four-season outdoor destination of choice in North America.
- Visitation to the region grows to 3 million annually.
- Tourism is recognized as a major driver of positive economic development in the Central Okanagan.
- Economic impact of the sector grows to \$1.28 billion annually in visitor spending.
- Residents, stakeholders, and visitors all report high satisfaction with value generated by the tourism sector.
- Visitors are viewed as delivering economic, social, and environmental value.



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## District of Lake Country MOU

- Tourism Kelowna is the community Destination Marketing Organization for the District of Lake Country
- DLC & TK commitments
- Per capita grant amount



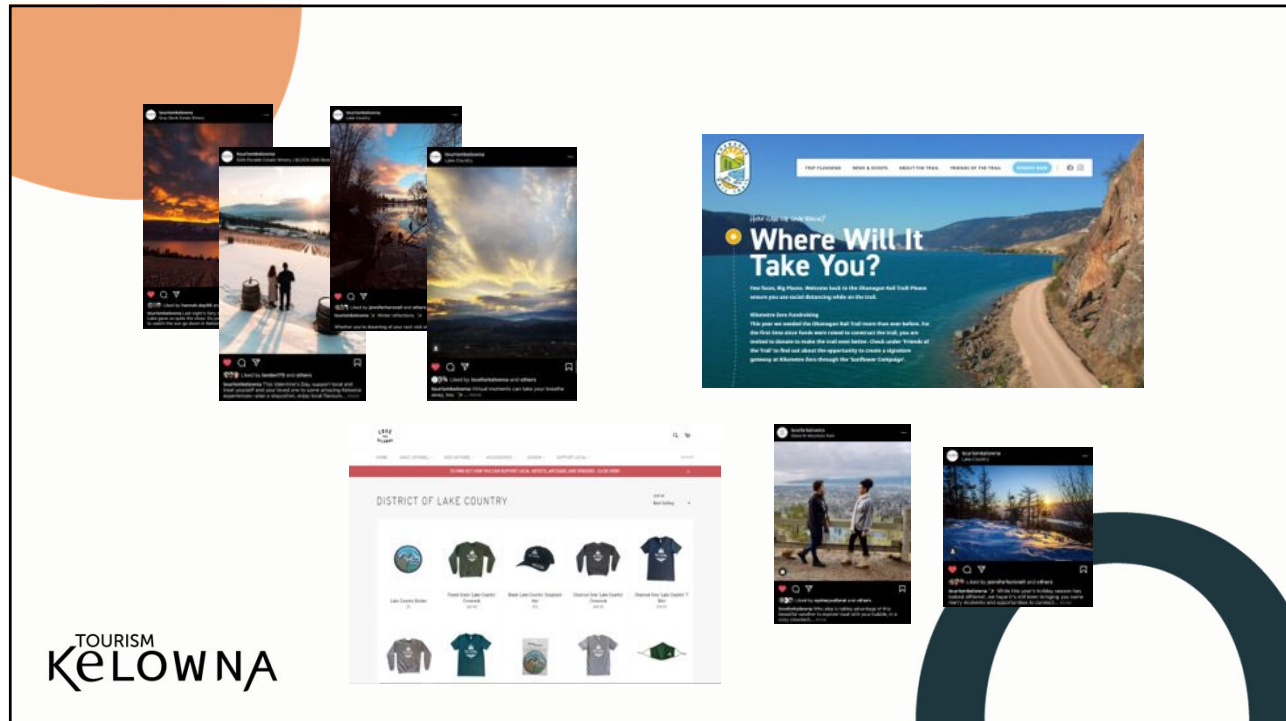
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## Lake Country Specific Content

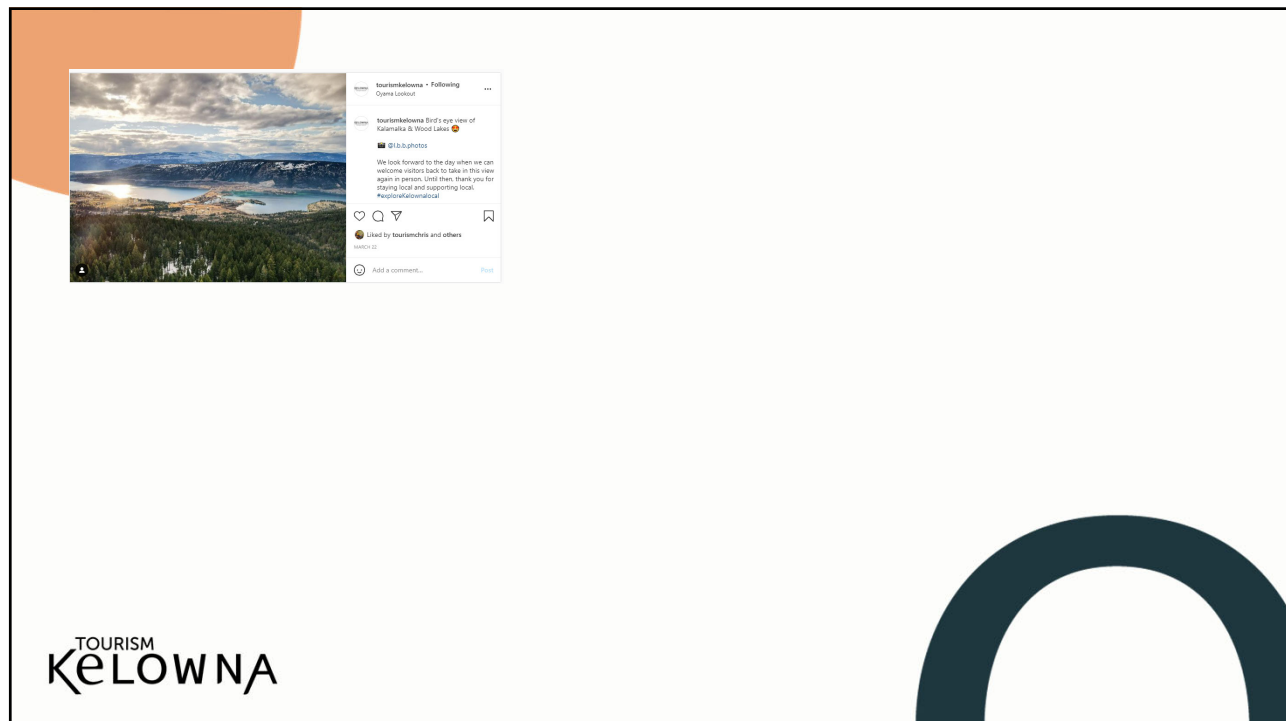
- 432 digital assets of Lake Country
- 37 #exploreKelowna blog posts themed around Lake Country since October 2018 with 63,813 pageviews
  - Recent blog posts include Locals Staycation, Favourite Places to Eat, Destination BC Fall Recovery Campaign Co-op
- Okanagan Rail Trail Launch
  - Website, tri-fold brochure, co-op and stand along marketing campaigns



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## Destination Marketing

Market the destination through:

- Targeted digital advertising campaigns.
- Owned digital channels.
- Earned travel media coverage.
- Social media and influencer campaigns.
- Travel trade (group and tour operators).

### Visitor Experience

Connect visitors and residents to tourism experiences and influence local spending through the Kelowna Visitor Centre, Airport Information Kiosk, mobile event services, and through digital and phone inquiries.

### Business Development

Ongoing, direct sales for meetings/conferences and preparation of collaborative bids to secure new, multi-day events, city-wide or region-wide.







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## Destination Marketing

Our marketing efforts put Kelowna and the Central Okanagan, and its brand, directly in front of more consumers for their consideration.

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## Programs

- Base or Enhanced Advertising Program
- Wine Trails
- Local Flavours
- Outdoor Trail Guide
- Destination Golf
- Meetings & Conferences
- Digital Display Advertising at the Kelowna Visitor Centre
- Kelowna International Airport (YLW) Brochure Racking
- Online Advertising (through Destination Travel Network)
- Digital Passport

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## WINE & FOOD LOVER

### Key Interests:

- Looking for a getaway with quality wine & food experiences, variety of wine tours, farm-to-table dining, craft breweries & cideries.
- Familiar with Kelowna, have most likely visited in the past, likely to recommend.

### Markets:

- BC, Alberta, Toronto, Seattle

### Advertising:

- TV – 15 sec/30 sec spots
- Online Video – 15 sec spot
- Digital Advertisements
- Social Media
- Content
- Earned & Owned

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## URBAN ADVENTURER

### Key Interests:

- Looking for a Spring getaway to an energetic town with a variety of urban and outdoor activities: Golf, beach & water activities, craft breweries, festivals/events, nightlife, wineries, food.
- Familiar with Kelowna and want to visit, but likely have never visited.

### Markets:

- Toronto, Seattle, Alberta, BC

### Advertising:

- TV – 15 sec spot
- Online Video – 15 sec spot
- Digital Advertisements
- Social Media
- Content
- Earned & Owned

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## GOLF ENTHUSIAST

### Key Interests:

- Looking for a getaway with a variety of golf courses and ease of access.
- Familiar with Kelowna and see golf as a key strength of Kelowna

### Markets:

- BC, Alberta, Toronto, National, W

### Advertising:

- TV – 15 sec spot
- Online Video – 15 sec spot
- Digital Advertisements
- Social Media
- Content
- Earned & Owned

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## OUTDOOR FAMILY

### Key Interests:

- Looking for a family friendly destination with a variety of outdoor, beach & water activities.
- Not especially familiar with Kelowna, but they are likely to have visited a long time ago and are interested in visiting again

### Markets:

- BC, Seattle, Alberta, Toronto

### Advertising:

- TV – 15 sec/30 sec spots
- Online Video – 15 sec spot
- Digital Advertisements
- Social Media
- Content
- Earned & Owned

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## MEETING & EVENT PLANNERS

**Key Interests:**

- Looking for a destination that is accessible with turn-key operations, great facilities, and can offer their delegates an interesting experience beyond the conference.
- Not especially familiar with Kelowna, but they likely have planned meeting or events in BC previously


**Markets:**

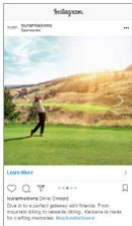
- BC, Alberta, Toronto, Seattle

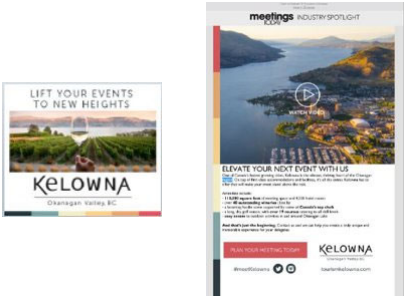
**Advertising:**

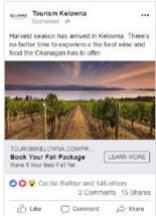
- Tradeshows
- Listings
- Digital Advertisements
- Social Media
- Content
- Print

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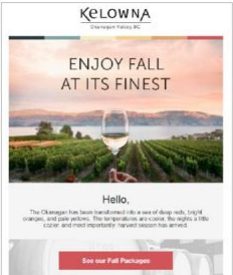









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## Marketing Winter



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## Visitor Experience

Our team delivers exceptional customer service and influences visitors to stay longer, spend more, and return for future visits, thereby creating direct economic impact in our region.



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## Kelowna Visitor Centre

- A community hub, where our team welcomed more than **320,000 visitors and residents** in 2019, compared to 16,000 a year in its previous location.
- Generated **6% of our total revenue** in its first full year of operations (2019).
- Kelowna residents report **97% awareness** of the KVC with 23% of the local population actively using, interacting or referring people there.
- Stakeholder satisfaction with visitor services increased slightly in 2020, **growing to 78%** from 76% the previous year.

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## Business Development

Our team's efforts support our four-season visitation strategy, with the goal of increasing meetings, conferences, and events business in soft-season months.

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## EVENT TOURISM

As part of our Major Events Strategy, our team collaborates with the City of Kelowna and community partners to present a unified and comprehensive destination option for events, with the goal of increasing our off-season economic impact.

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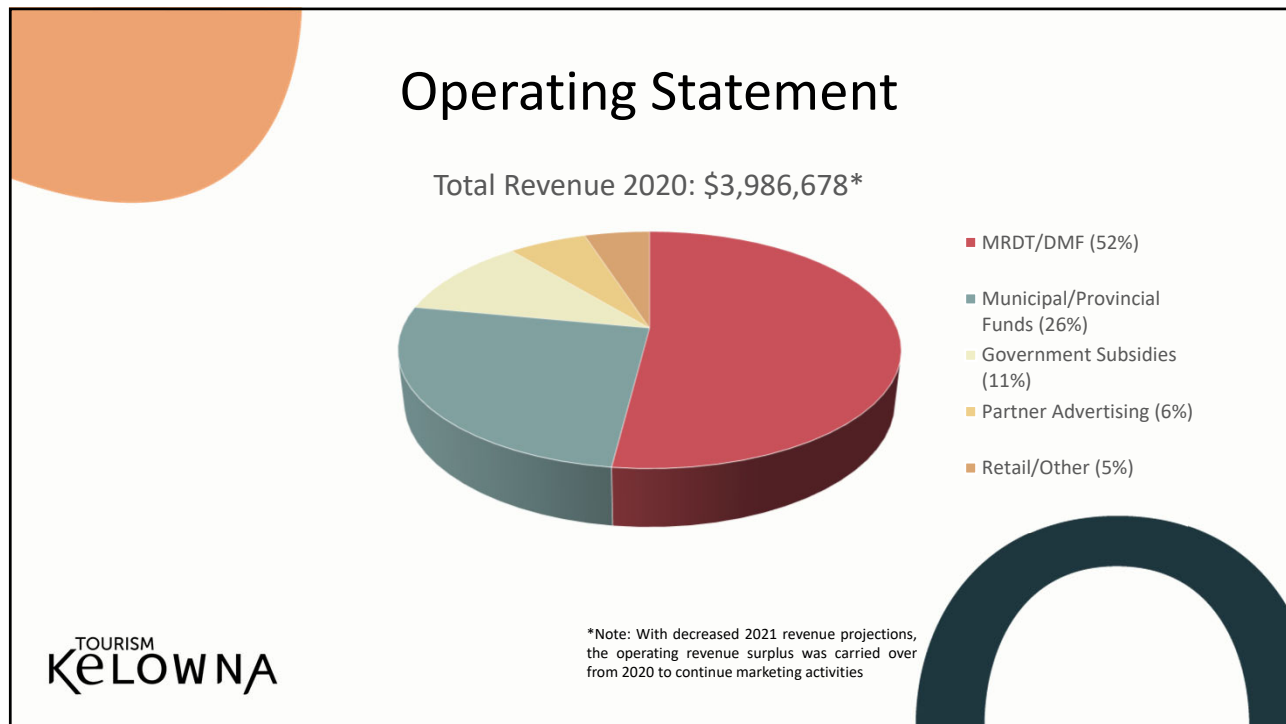
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## Administration and Finance

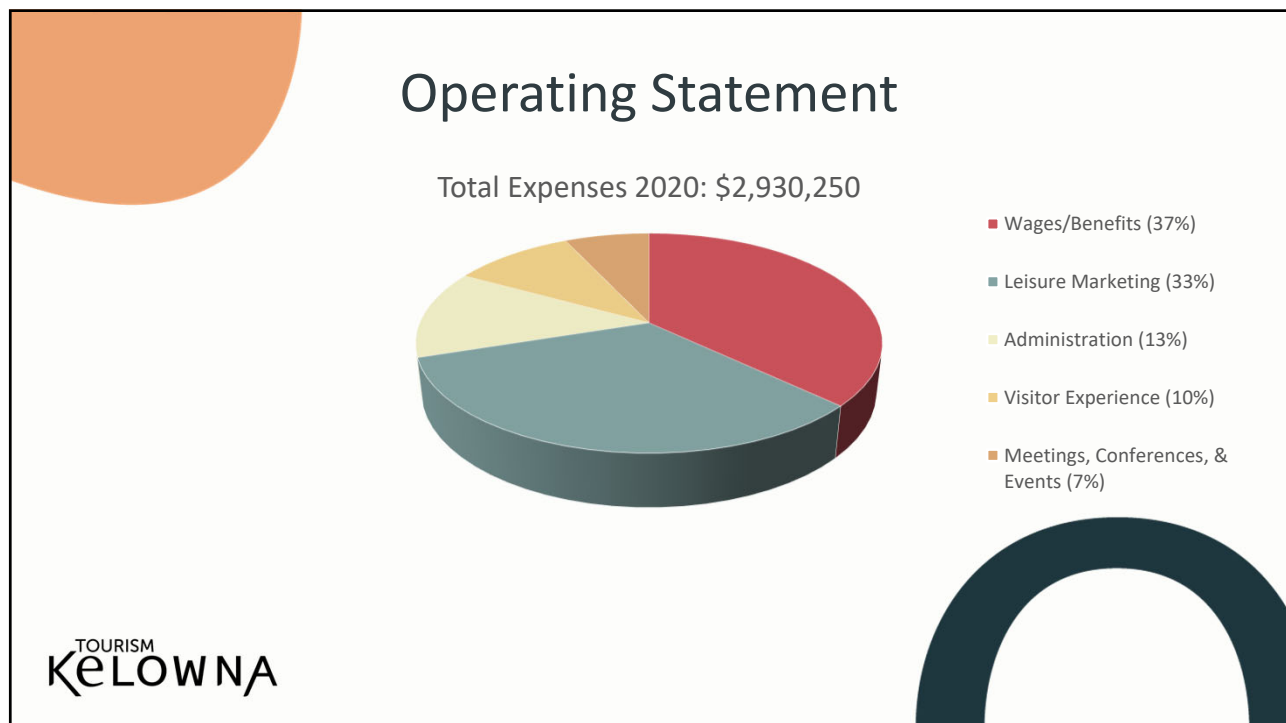
- Helps manage daily operations and supports the Society's Board of Directors.
- Acts as stewards of the organization's external funding and self-earned revenue.
- In 2020, focused on successfully guiding the organization through the impact of the COVID-19 pandemic:
  - Developing a conservative budget strategy to successfully manage at-risk revenue and reduced cash flow.
  - Daily management of the re-forecasted operations budget while applying for and managing administration of COVID-19 government grants and relief subsidies.
  - Managing a unique year of revenue analysis and reporting requirements association with the Municipal and Regional District Tax funding.

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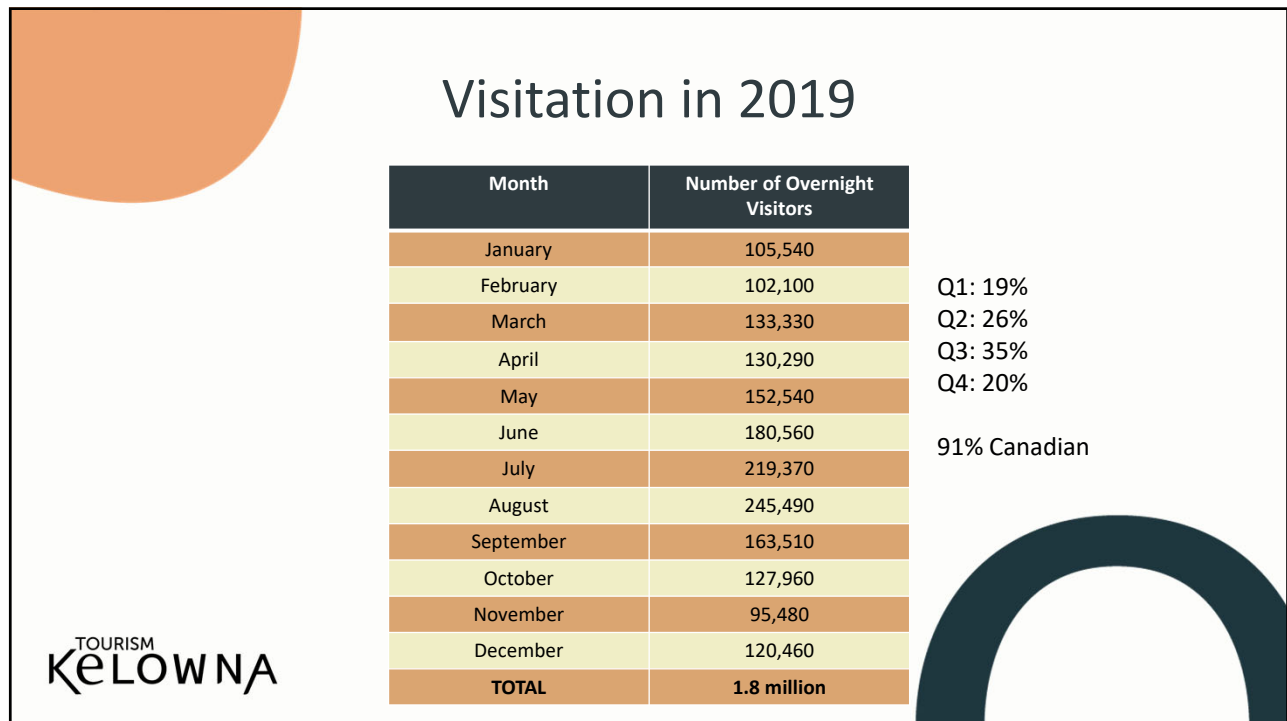
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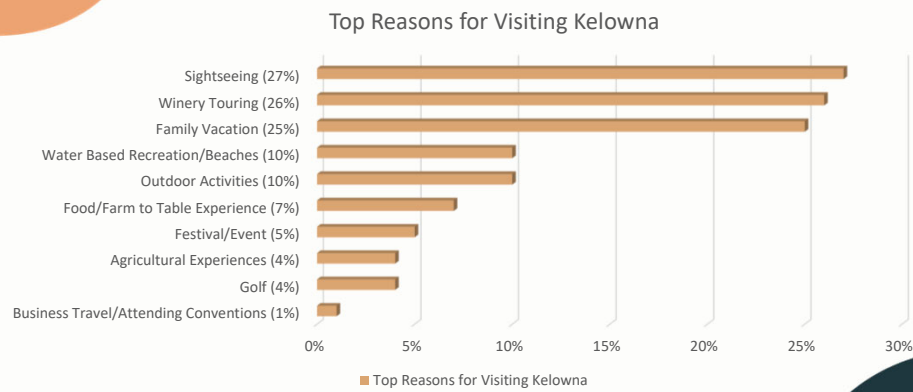


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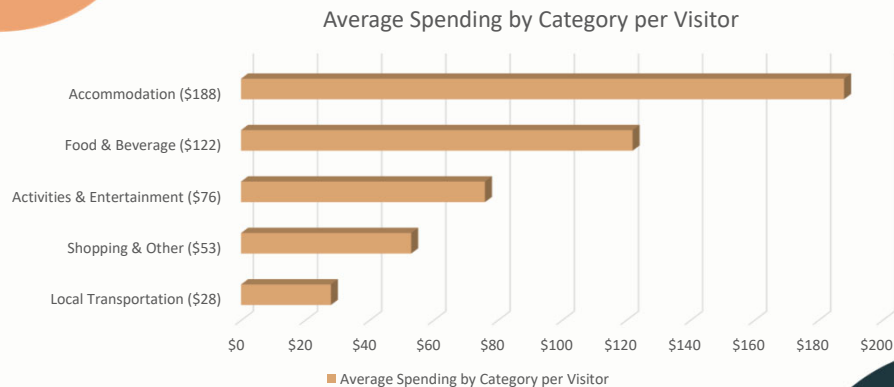
## Visitor Motivations



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## Visitor Spending



Total average  
spend per party:  
\$1,503

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## Hotel Occupancy

Hotel Occupancy %	2019	2018	Change
January	44.0 %	43.4	+ 0.6
February	54.5 %	50.5	+ 4.0
March	57.7 %	61.2	- 3.5
April	63.5 %	63.1	+0.4
May	76.3 %	74	+2.3
June	79.3 %	76.0	+3.3
July	85.4 %	83.3	+2.1
August	91.1 %	79.6	+11.5
September	76.5 %	75.5	+1
October	65.8 %	64.9	+1
November	55.1 %	51.9	+3.2
Average year to date	68.1	65.8	+2.3

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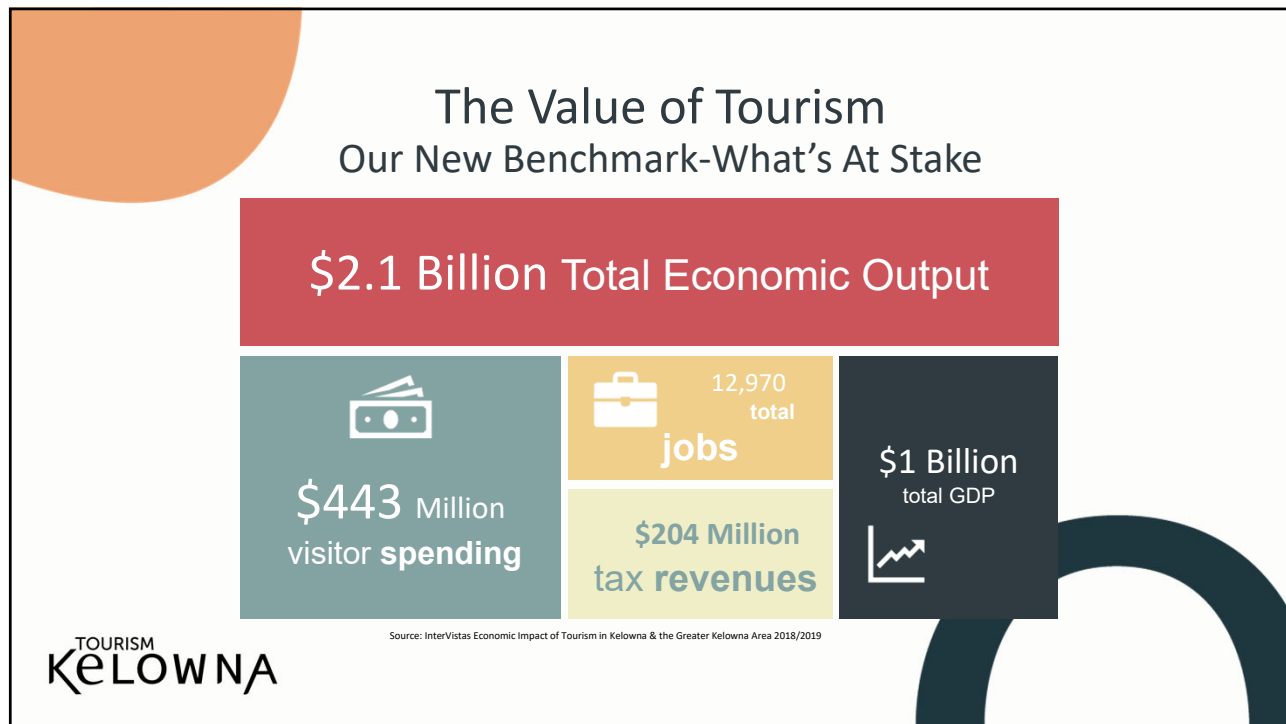
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## Weathering the Storm - 2020

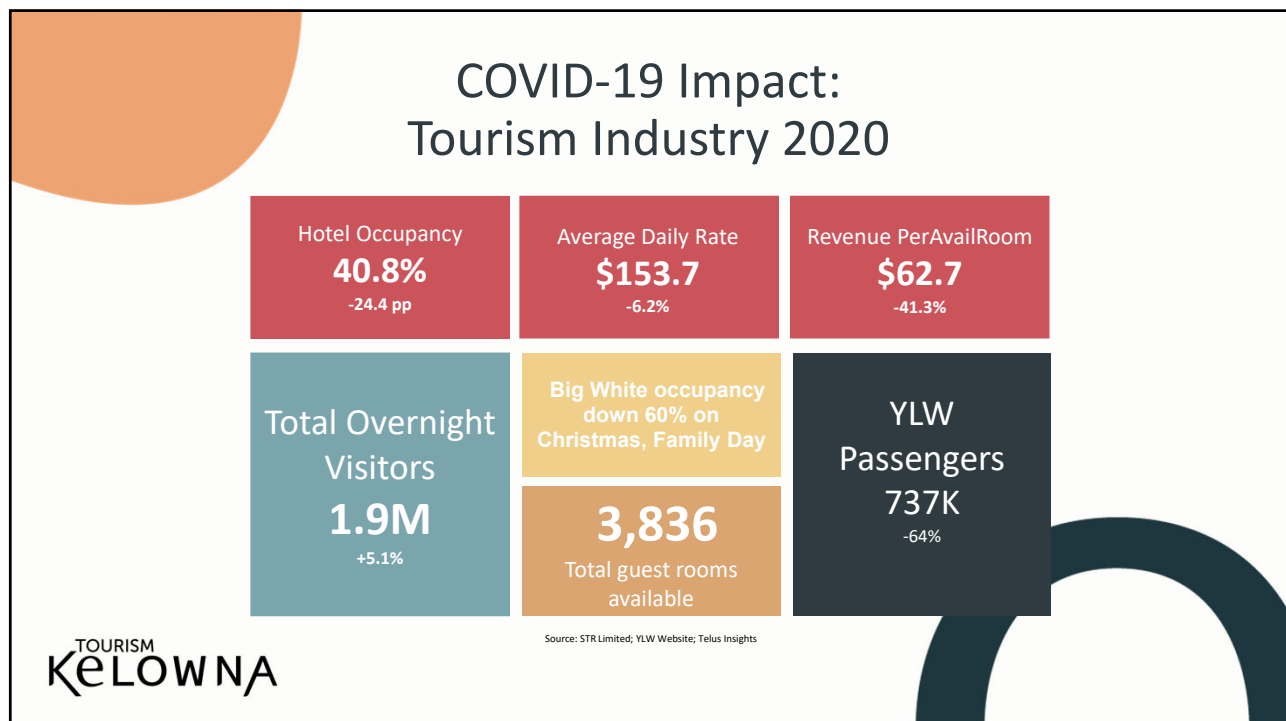


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## COVID-19 Impact: The DMO

### Original 2020 budget

\$4.7 million, including \$2.96 million in MRDT, was cut to \$3.94 million

- Staff layoffs; remaining payroll supported by CEWS program.
- Stakeholder programs and services cut.
- Kelowna Visitor Centre closure and reduced operating hours; limited service at YLW Information Kiosk.
- Marketing budget cut; when health orders restricted travel, any marketing funds were redeployed to local tourism marketing.
- Cash flow management challenges when summer MRDT funds were delayed and did not arrive until Q4.
- Permanent closure of the Abbott Street office; business development, marketing, and administration/finance team members now work from home.

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**2021 budget** reduced by 40% of normal budget level; MRDT funding and timing still at risk based on hotel occupancy levels.

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## COVID-19 Impact: DMO Budget

2021 Budget	2020 Budget Pre-COVID	Variance to 2020
\$ 2.7 million	\$ 4.7 million	- \$2 million
2021 MRDT Funds Budget Estimate	2020 MRDT Funds Estimated Pre-COVID	Estimated MRDT Variance to 2020 Pre-COVID Budget
\$ 1.54 million	\$ 2.96 million	- \$1.42 million

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## COVID-19 Impact: Regional Status

- On average, only 20% of tourism businesses report that they are operating “as usual.”
- Approx. 23% of operators were closed at any given point in the past year due to COVID-19.
- On average, approx. 57% of businesses report operating at reduced capacity in the past year.
- About 30% of survey respondents reported losing 50% or more of their revenue compared to the same month in the previous year.

Source: Thompson Okanagan Tourism Association

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## COVID-19 Impact: Local Stakeholder Status

- Approx. 65% of businesses surveyed report a drop in revenue of over 20% from last year during the winter period.
- Approx. 76% are forecasting a drop in revenue for the spring season (highest response was 28% forecasting a 20-40% drop).
- Approx. 85% have accessed some level of government support program.
- Approx. 73% have not applied for the BC Small and Medium Sized Recovery Grant.

Source: Tourism Kelowna Stakeholder COVID-19 Impact Survey, March 2021

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## Visitor Economy Forecasts

\*Based on current health models and vaccination status

- **Leisure travel** recovery could begin in 2021 for strong, short-haul domestic travel markets like the Okanagan.
- **International travel** visitors post 2022 based on boarder, cruise ship, and air travel restrictions.
- City-wide **meetings and conferences** could begin to return in 2022.
- **Major events** dependent on large audiences could return in 2023.
- **Kelowna International Airport** air services modelling shows 2024 as a conservative estimate for recovery.

Source: Tourism Kelowna Stakeholder COVID-19 Impact Survey, March 2021

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## Destination Management: An Integrated Approach

- Surveys show that sustainable, responsibly tourism is ranked a high priority for 96% of Kelowna tourism business and for 86% of Kelowna residents.
- Tourism Kelowna has traditionally worked on the “demand” side of tourism: short-term marketing and visitor services.
- City of Kelowna manages the “supply” side: infrastructure, public services, etc.
- The co-creation of a Tourism Master Plan will provide long-term direction on how we create a connected, collaborative, smart, and responsible community for residents and visitors.

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