



# City Stays

# TOURISM SECTOR PROFILE

MAY 2014

## City stays at a glance in British Columbia

City stays related spending in Vancouver (2011)	\$3.5 billion	City stays related spending in Whistler (2012)	\$1.1 billion
City stays related spending in Victoria (2010)	\$970 million	City stays related spending in Kelowna (2009)	\$279 million
Top target markets: Alberta, Washington, California, and British Columbia			

Sources: Tourism Vancouver, Tourism Whistler, Tourism Victoria, Tourism Kelowna, In-Market Research Report

## About city stays

In British Columbia, *city stays* are defined as trips which involve a visit to a city within the province to partake in urban activities. Often, the destination is chosen for the variety of tourism experiences offered rather than the availability of a single activity. British Columbia has urban centres that attract visitors from around the world. As evidenced by positive features in publications, such as Conde Nast Traveler and high rankings on consumer-review websites, such as TripAdvisor, British Columbia's urban centres have a lot to offer visitors during their stay. In 2013, British Columbia received 3 spots on TripAdvisor's top 8 rated Canadian destinations. Vancouver was rated as the top destination.

2013 top rated Canadian destinations on TripAdvisor		Rating
		(1 - 8)
Canadian cities	Vancouver, BC	1
	Montreal, QC	2
	Niagara Falls, ON	3
	Toronto, ON	4
	Quebec City, QC	5
	Banff, AB	6
	Victoria, BC	7
	Whistler, BC	8

Source: www.tripadvisor.ca

This profile focuses on 6 urban centres considered to have a strong city stays product offering. These include Vancouver, Victoria, Whistler, Richmond, Kamloops, and Kelowna. Combined, these cities account for 25% of British Columbia's population.

2013 British Columbia city populations		Population	Share of British Columbia population
		Thousands (,000)	Share of total
British Columbia cities	Vancouver	641	14%
	Richmond	201	4%
	Kelowna	120	3%
	Kamloops	88	2%
	Victoria	83	2%
	Whistler	10	.2%
	Other BC cities	3,438	75%
	<b>Total</b>	<b>4,581</b>	<b>100%</b>

Source: BC Stats

Tourism Vancouver promotes Vancouver as *Spectacular by Nature*. The city offers outstanding outdoor adventure opportunities, including skiing / snowboarding, combined with urban amenities such as renowned cuisine and cultural attractions.

Tourism Victoria promotes Victoria as *Full of Life*. As the province's capital, the city is renowned for its British heritage, historic buildings, gardens, range of tourism attractions including cultural institutions, dining, and outdoor adventure opportunities.

Tourism Whistler promotes Whistler as a four-season resort. The resort is renowned for skiing / snowboarding, golf, outdoor activities, and festivals, in addition to highly regarded accommodation and dining options.

Tourism Richmond promotes British Columbia's fourth largest city as *Far East Meets West Coast*. Richmond's population self-identifies as more than 60% Asian and is highly regarded for its Asian dining options and shopping opportunities, including the Golden Village district. The city also offers outstanding heritage attractions, including historic Steveston, which offer unique experiences for the traveller. Richmond is also home to the Vancouver International Airport.

Tourism Kamloops markets the city as *Playtime. Refined*. The city, at the confluence of two rivers, is known for its semi-arid climate. It offers a full range of outdoor adventure activities including 12 golf courses and skiing / snowboarding. The city also focuses on sport tourism, marketing itself as Canada's Tournament Capital.

Tourism Kelowna promotes Kelowna as *Ripe with Surprises*. Kelowna, located on Okanagan Lake, offers a full range of water-based recreation opportunities, in combination with 19 golf courses, skiing / snowboarding, and other outdoor adventure activities. The city is also well known for its wineries and local cuisine.

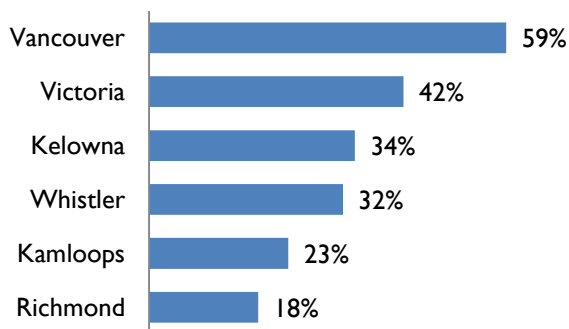
## Global volume

The importance of city stays to the overall global tourism industry has not yet been estimated.

## Market of interest

The 2012 In-Market Research Report conducted for Destination British Columbia looked at travel patterns and motivations among British Columbia's top markets for city stays which included Alberta, Washington, and British Columbia residents. Approximately 70% of visitors from these markets travelled within British Columbia in the past 2 years. Of the 6 cities included in this profile, Vancouver was the most travelled-to city destination having been visited by approximately 60% of travellers. Victoria was visited the second most, having been visited by 42% of travellers, followed by visits to Kelowna, Whistler, Kamloops, and Richmond.

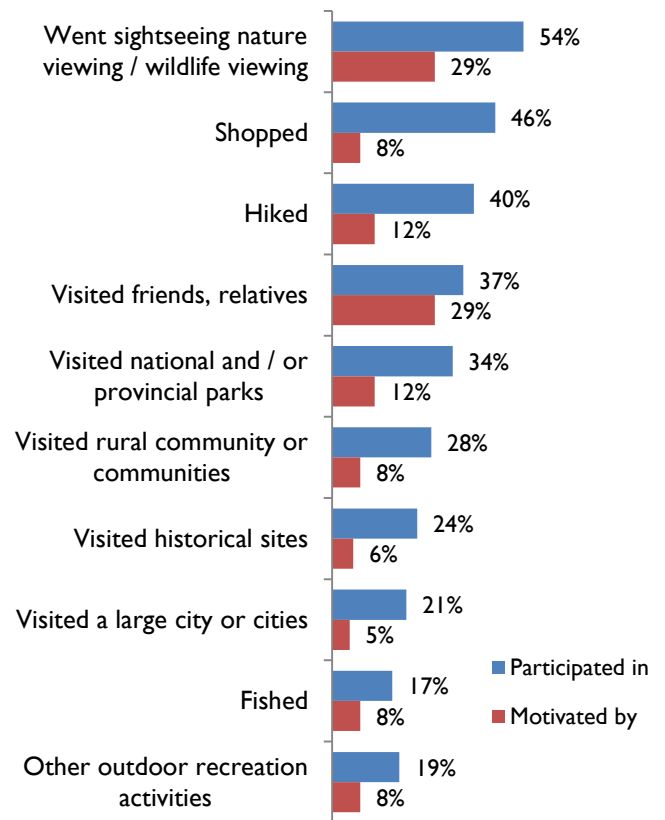
British Columbia cities visited in past 2 years



Source: In-Market Research Report (2012)

Visiting large cities was ranked 10<sup>th</sup> overall as a primary motivation to visit British Columbia by visitors from Alberta, Washington, and British Columbia residents. Only 5% of visitors stated that a visit to a large city was the primary purpose of their leisure visit to British Columbia. However, visiting large cities was ranked 8<sup>th</sup> overall as an activity done while visiting the province. 21% of leisure visits resulted in a visit to a large city in British Columbia during their trip. This suggests city stays are rarely the primary purpose of a trip, but many visitors will spend time in cities as part of their stay at the destination.

Top 10 activities among visitors to British Columbia



Source: In-Market Research Report (2012)

## Visitor characteristics

Characteristics of visitors participating in city stays tourism has not been measured.

## Economic Value

City stays make a significant economic contribution to British Columbia's tourism industry. In comparison to the 5 other cities in this profile, Vancouver has the largest

† The city of Surrey and Burnaby have the second and third largest populations in British Columbia, 482,725 and 231,811.

visitation – 8.3 million visitors visit Vancouver, followed by Victoria at 3.1 million. Visitor spending follows a similar pattern – Vancouver with \$3.5 billion, followed by Victoria, where visitors spend \$970 million.

British Columbia's overnight visitation and visitor spending		Visitation (\$ millions)	Visitor spending (\$ millions)
British Columbia cities	Vancouver†	8.3 (2011)	\$3,500 (2011)
	Victoria	3.1 (2010)	\$970 (2010)
	Whistler	2.3 (2011)	\$1,100 (2012)
	Richmond	4.4 (2013)	\$279 (2013)
	Kelowna	1.5 (2010)	\$279 (2010)

Sources: Tourism Vancouver, Tourism Victoria, Tourism Whistler, Tourism Kelowna, Tourism Richmond, BC Stats

In 2012, Vancouver lead the 6 cities with the greatest number of rooms available, nearly 15,000, followed by Victoria with nearly 9,000. Room revenue for Vancouver reached \$533 million in 2012.

British Columbia's room and room revenue		Number of rooms Thousands (,000)	Room revenue (\$ millions)
British Columbia cities	Vancouver	14.6 (2012)	\$533 (2012)
	Victoria	8.9 (2012)	\$123 (2012)
	Whistler	8.0 (2012)	\$177 (2012)
	Richmond	4.8 (2012)	\$133 (2012)
	Kelowna	4.4 (2012)	\$69 (2012)
	Kamloops	NA	\$45 (2012)

Sources: Tourism Vancouver, Tourism Whistler, Tourism Victoria, Tourism Kelowna, BC Stats

† Vancouver figures represent Metro Vancouver, which would include surrounding cities such as North Vancouver, West Vancouver, Burnaby, etc.

## Barriers to growth

The city stays sector is heavily reliant on visitors from short-haul markets. One of the most significant barriers is competition from western US cities. These cities are viewed to offer similar experiences to British Columbia cities. Washington travellers, British Columbia's largest US market (representing 41% of the US market), are most likely to see Seattle and San Francisco as alternative cosmopolitan destinations to visit, offering a similar suite of things to see and do, and similar abundance of restaurants, attractions and arts, and shopping.

Another key issue is access to the Province, whether it is air-access, or border crossings. For example, a 2009 Washington State Traveller Research study found border line-ups to be an impediment to visitation for travellers from that state (mentioned by 21% of respondents). The Province is looking into ways to create opportunities for new and expanded passenger pre-clearance and trusted traveller programs at air, marine and land borders. Additionally, addressing air access impediments such as competitive business opportunities for airlines to access British Columbia, as well as supporting VISA reform work led by the Federal government, are key to supporting the resilience and growth of the city stays sector.

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