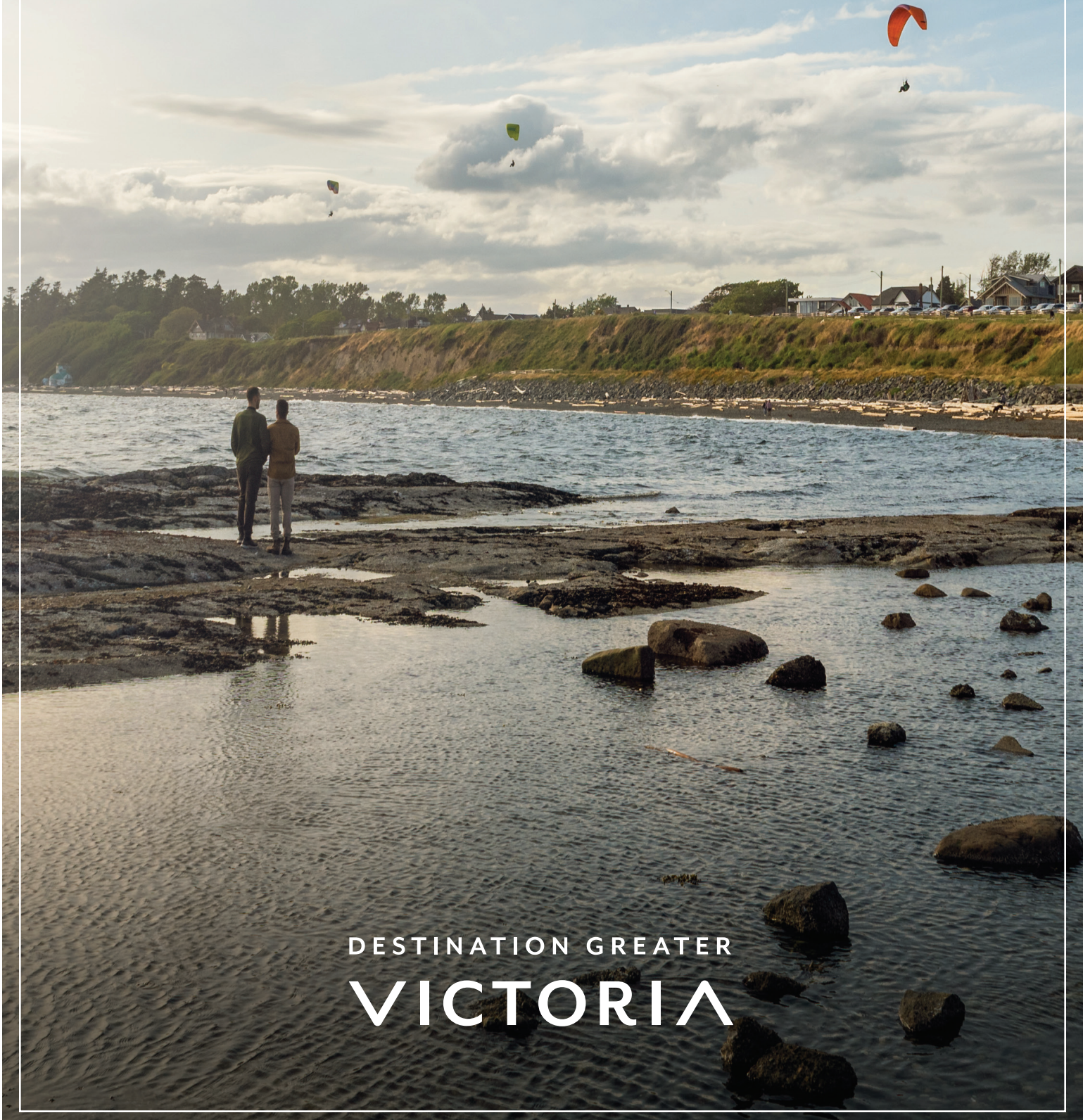


DESTINATION GREATER VICTORIA

2025 Business Plan

DESTINATION GREATER
VICTORIA



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MESSAGE FROM THE CEO

Valued members and community partners,

As Greater Victoria's visitor economy concludes 2024 and Destination Greater Victoria prepares for 2025, we look forward with a clear-eyed and achievable plan to continue to execute at a level that is stronger than our competition. 2024 was a year that reminded us that tourism growth cannot be taken for granted. While many destinations across British Columbia experienced declines in absolute terms, particularly in occupancy and RevPAR, Greater Victoria was a shining star in terms of tourism performance in 2024. This success was due to continuous hard work across multiple customer segments within a diversified strategy. The Meetings and Conference business provided an excellent foundation in 2024 ensuring that leisure business was not relied on in an oversized manner. This foundational business needs to continue to deliver in 2025 and is on pace to do so again.

As we move into 2025, economic uncertainty continues to dominate the headlines. Consumers and households have felt the strain of high inflation and steep interest rates for more than two years, and it is fair to say that households are creaking under this pressure. When composing this plan, central banks in Canada and the United States have begun easing cycles and reducing overnight interest rates. This is only the beginning of this phase, and it remains to be seen how consumers will feel by the spring of 2025 as travel planning and booking activities pick up in earnest.

Over the past number of years, we have learned that Greater Victoria is viewed globally as a premier destination; a destination with its own world-leading brand identity and top-ranking accommodations and experiences. Named the number one Small City in the World by Condé Nast Traveler's readers for the second year in a row, our tourism brand, both business-to-business and to the consumer, is at an all-time apex. Standing in global rankings ahead of powerhouses such as Puerto Vallarta, Mexico; San Sebastián, Spain; Salzburg, Austria; and Porto, Portugal is something that has been hard won and earned through consistent effort and investment over recent years. Our brand is centred on sustainability, livability, and unique experiences; it stands out from other great West Coast brands. It is a platform we can compete on with the rest of the world.

While our brand and business success are at a high point, now is the time for reinvestment. Our destination is slightly underserved in the accommodation sector, our key public amenities such as the Lower Causeway require investment, and the Victoria Conference Centre and Royal BC Museum are aging. Most importantly, our competitors are making strategic investments in their cities to benefit both visitors and residents. To stay ahead of the competition, it's essential for our region to advance and adapt to the changing needs of travellers. For example, visitors, like residents, need smooth, integrated transportation planning, and appreciate a high level of activation within a destination. All of this can be accomplished sustainably and in deep collaboration and partnership with Indigenous communities. Fortunately, in November 2024, Destination Greater Victoria released its 2025-2035 Destination Master Plan. The Plan is a roadmap that outlines the vision, goals, and actions for the sustainable development of tourism in the region over the next 10 years.

Through all our efforts, our commitment to our valued members and community partners is to maintain a highly effective Destination Organization. We commit to listening, building strong strategies, executing them relentlessly, and being transparent and accountable in our reporting. Our goal is to remain one of the top mid-sized Destination Organizations. We strive to continue this success in 2025.

Sincerely,

A handwritten signature in black ink, appearing to read "Paul Nursey". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

Paul Nursey

CEO, Destination Greater Victoria

BACKGROUND AND SITUATION ANALYSIS

Greater Victoria’s visitor economy outperformed many other cities in British Columbia in 2024. While tourism was down, in absolute terms, in many key destinations in British Columbia, Victoria was a solid performer, achieving notable growth.

The year was particularly successful for Greater Victoria hotels. While several areas of British Columbia saw little growth, Victoria made significant progress, with anticipated increases in RevPAR ranging from 9% to 13%, contingent on the hotel's star rating or its location within the Greater Victoria area.

	Growth in Occupancy	Growth in ADR	Growth in RevPAR
Greater Victoria	+ 5.0%	+ 6.7%	+ 12.0%
Vancouver	+ 0.2%	+ 9.1%	+ 9.4%
Richmond	- 5.6%	+ 4.8%	- 1.0%
Kelowna	+ 4.7%	+ 1.2%	+ 5.9%
Kamloops	- 7.6%	+ 4.6%	- 3.3%
Thompson-Okanagan	- 5.0%	+ 2.6%	- 2.6%
Whistler	- 2.4%	+ 0.5%	- 1.9%

Source: CoStar, rolling 12 months to August 2024.

Looking ahead to 2025, Greater Victoria once again has a very strong foundation of conference business, with May 2025 expected to be an exceptionally strong month. The return of Victoria International Airport’s gross arrivals to pre-2019 numbers, the “thickening” of air routes (more frequency on existing routes) and/or the introduction of more routes servicing Victoria International Airport, along with the continuation of strong brand accolades, and a constrained short-term vacation rental environment are all contributors to the platform from which we enter the next business year.

As a destination, several crucial success factors will enable Greater Victoria to maintain its trajectory of sustained and sustainable growth in 2025: consolidate business gains achieved in 2024; build incremental growth to stay ahead of factors such as inflation to ensure bottom line improvement for our valued members; and to continue to work on critical destination stewardship areas of focus including sustainability, indigenous tourism, and equity diversity and inclusion.

Being on Vancouver Island and physically separated from our key source markets will mean that transportation and access will continue to be significant strategic and business priorities.

Destination Greater Victoria launched a comprehensive 10-year Destination Master Plan in November 2024 for the 2025-2035 period. Destination Greater Victoria will be focused on actioning priority elements of the Master Plan while working the key foundational elements of the Master Plan into its next 2027-2031 five-year Strategic Plan linked to its Municipal Regional District Tax (MRDT) mandate.

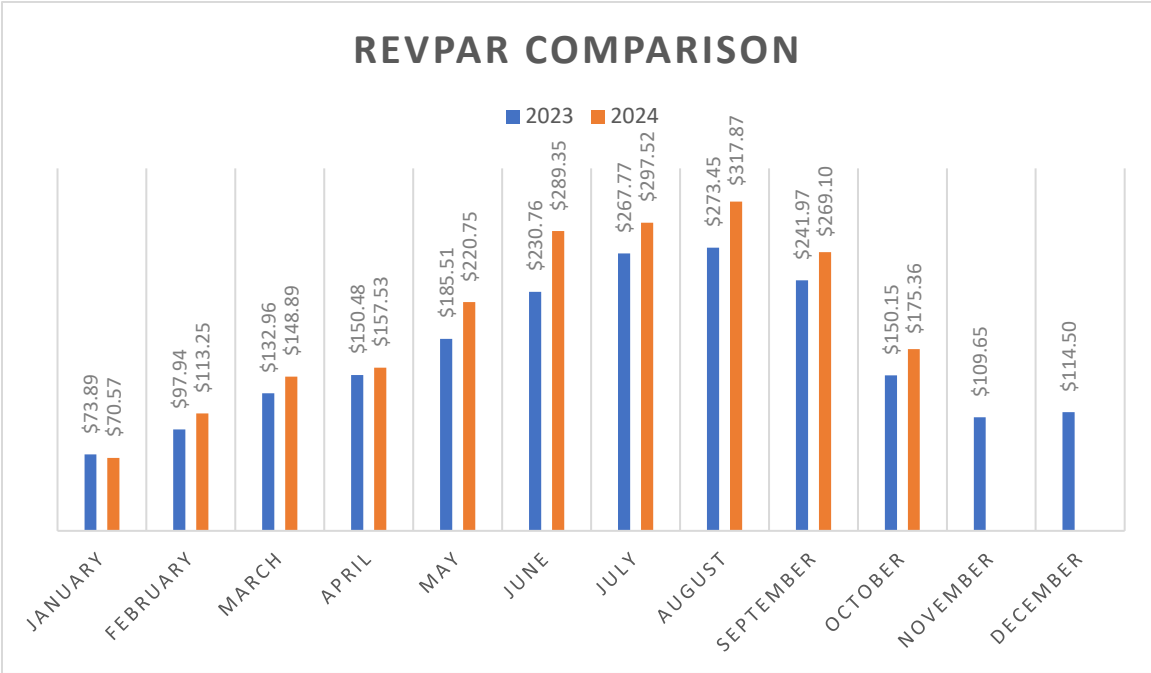
Greater Victoria Key Visitor Indicators

Destination Greater Victoria’s research business unit provides an ongoing dashboard of statistics shared with members on a regular basis. For the purposes of creating business context for the 2025 business plan, as series of 2024 year-to-date statistics are shared below. The purpose is to show that 2024 has demonstrated significant continued recovery and incremental growth across a series of industry indicators. In the case of some categories, such as accommodations statistics and BC Ferries, record numbers were achieved.

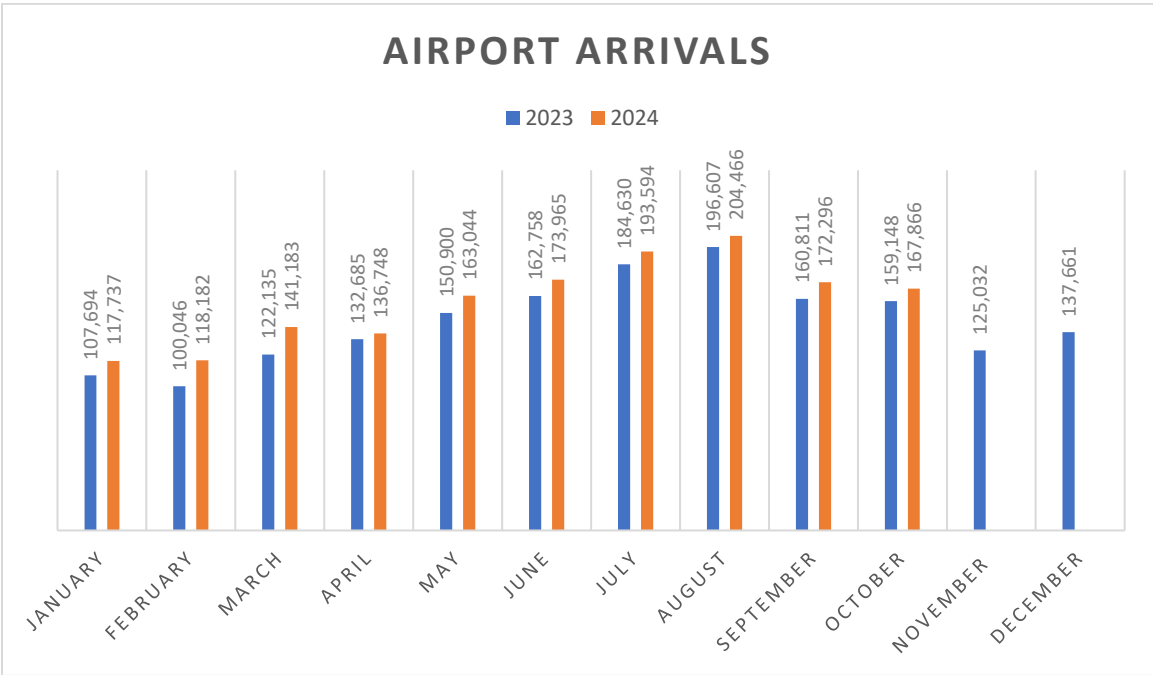
For 2025, the business opportunity and imperative are to consolidate the growth achieved this year and drive ongoing improvements. All of this must be done in alignment with our community values in order to ensure that Tourism is a powerful engine of positive economic growth, amenity development and community vitality for the South Vancouver Island and its residents.

Accommodation Statistics

In 2024, RevPAR has shown consistent growth compared to 2023, with a year-to-date variance of +\$28.74.

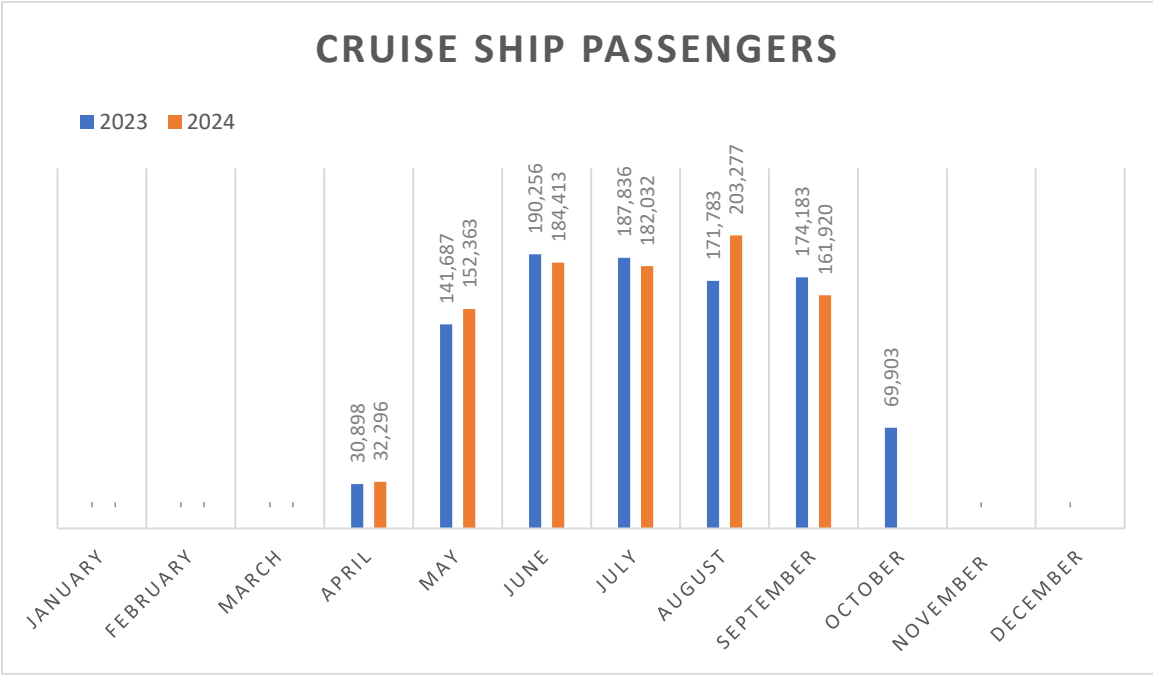


Airport Arrivals Year-To-Date



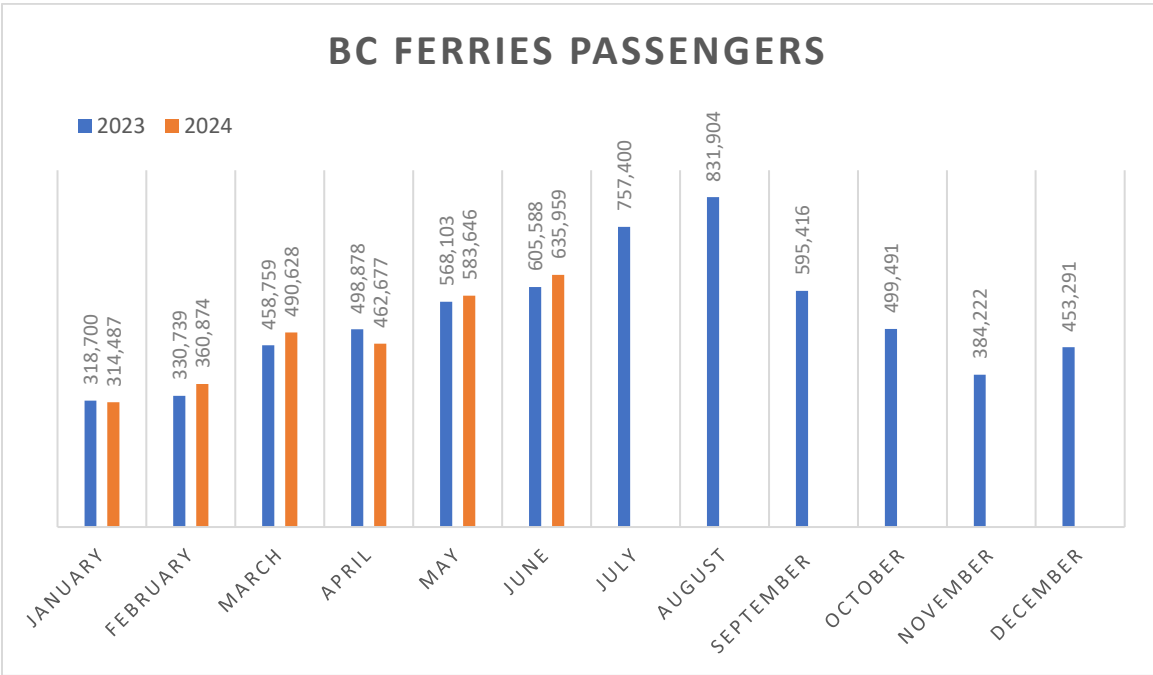
Victoria International Airport arrivals increased each month in 2024 over 2023 at a year-to-date variance of +7.4%. This total included domestic, trans-border, and international arrivals. Major routes from Toronto, Calgary, and Seattle experienced significant “thickening” (more frequency on existing routes) with more frequencies than in 2023. Destination Greater Victoria will continue to work with the Victoria Airport Authority to support maintenance of existing routes and incremental growth where possible.

Cruise Ship Passengers



On average, 2024 cruise ship passenger levels remain on par with 2023.

BC Ferries Passengers



BC Ferries' passenger levels are continuing to increase in 2024 over 2023 levels at a steady average rate of 3.27%. BC Ferries' Vancouver (Tsawwassen) – Victoria (Swartz Bay) route, also known as Route 1, is the most popular route in the fleet and is operating at greater than 90% capacity year-round.

State Of the Economy

The ability of households to travel for leisure and for businesses to hold meetings and conferences and to send delegates to association meetings or on incentive trips is central to the health of the visitor economy. 2024 was a year where households felt the strain of high interest rates and cost of borrowing, decreasing but still significant inflationary pressures, and widespread headlines of corporate layoffs and constraining consumer confidence.

Conversely, as we head into 2025 there are signs of improvement on the horizon. Interest rates for central banks are being reduced in Canada, United States, and Europe and equity markets are at all time highs increasing the wealth effect or perception of wealth. This is particularly true for those who have considerable savings such as the lucrative baby boomer market who have the time and disposable income to travel.

Consumer spending remains muted and decreasing corporate earnings have hampered businesses' major investment capacity, according to new research from The Conference Board of Canada. The worst is behind us, however. Canada's real GDP growth is forecast to be just 0.8 per cent in 2024, before recovering to 2.2 per cent in 2025.¹

After a better-than-expected year for economic growth in 2023, the U.S. economy is forecast to slow to a below-trend pace in 2024 as the impact of higher interest rates weighs on demand. By 2025, growth is expected to be on the upswing again as rates normalize, with the economy settling back to trend growth (approximately 2.0 per cent) over the medium term.²

The US economy, households, and productivity is continuing to significantly outpace Canada; Canada's economic growth is largely driven by public sector investment which is not sustainable for the long term. More constrained public sector spending in Canada is inevitable in the next two to three years as a reset is likely coming³. A likely decrease in government spending in Canada could impact the financial aspects of the destination, including grants from the government and crown agencies, as well as corporate travel.

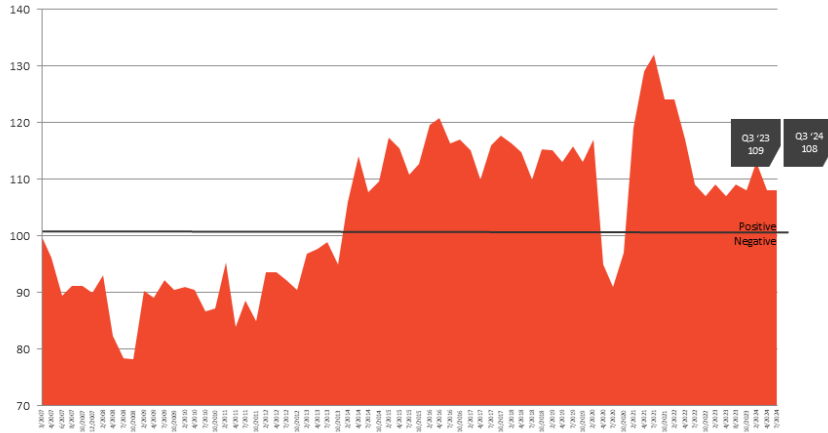
The MMGY Traveler Sentiment index for 2025 remains muted compared to the euphoric desire to travel coming out of the pandemic, yet overall, the travel opportunity remains high to participate in the travel marketplace.

¹ (The Conference Board of Canada: Turning Point Ahead: Provincial Five-Year Outlook - June 2024, 2024)

² (Deloitte Global Economics Research Center: United States Economic Forecast, 2024)

³ Jock Finlayson, Senior Fellow and Peter Brown Chair in Canadian Competitiveness, Fraser Institute; Chief Economist, ICBA. Presentation to Victoria business leaders, October 9, 2024.

Traveler Sentiment Index™ (TSI): Down Slightly From One Year Ago.



The Traveler Sentiment Index™ (TSI) consists of six variables, including interest in travel, time available for travel, personal finances available for travel, affordability of travel, quality of service and safety of travel. It provides a glimpse into how U.S. adults are feeling about travel this year compared to the same time a year ago. MMGY Travel Intelligence has calculated and reported the TSI quarterly since March 2007; therefore, we are able to compare the indices to February 2020 (pre-pandemic levels) to track how the traveler mindset has changed throughout the COVID-19 pandemic.

Traveler Sentiment Index™

Base: U.S. adults (n=4,501)
Source: MMGY's *travelhorizons™/2024 Portrait of American Travelers™* "Fall Edition"

The trend of bifurcation in the travel market, where upscale and luxury travel exceeds value focused travel is expected to continue in 2025, along with a strong focus on values based authentic travel experiences that resonate with a discerning traveller. Greater Victoria, as a lifestyle focused, sustainable urban destination, with an intimate resort feel, surrounded by a variety of high quality authentic and sustainable experiences is well positioned to compete in these conditions. Greater Victoria's extensive list of destination accolades obtained over the past number of years adds to the sense of urgency as a "must experience" destination with bragging rights associated with it.

Year Of Transition in Short-Term Vacation Rental Market

The Government of British Columbia introduced the Short-Term Rental Accommodations Act in October 2023, and it became law in May 2024. In Victoria, availability of short-term vacation rental listings on Airbnb and VRBO decreased by more than 50% from September 2023 (1,133 listings) to September 2024 (557 listings)⁴. This has removed approximately 575 units of the short-term vacation rentals from the market. The purpose of this legislation is to reintegrate these housing units back to the residential housing market. A vibrant visitor economy includes the ability for workers to find homes to live in.

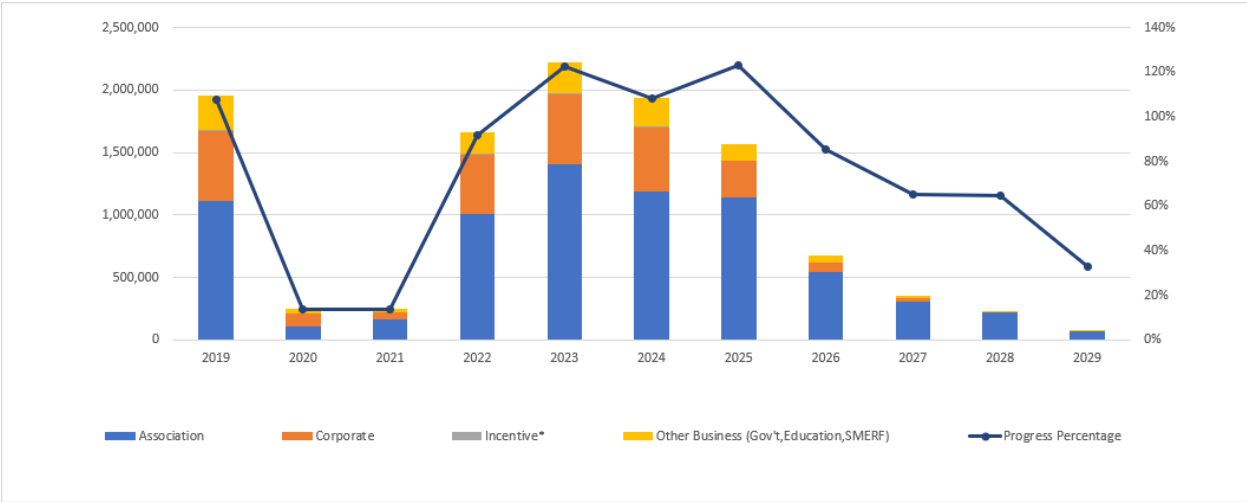
This subject was an ongoing topic of media discussion in the lead up to the implementation of the act and concerns were raised about the impact of the legislation on the visitor economy. 2024 was a year of transition, and one of the key recommendations of DGV's Destination Master Plan is to improve the efficiency of approval of full service commercial transient accommodation (hotels, motels, etc.).

⁴ Source: AirDNA

Business Events Pace

Business events (meetings, conventions, exhibitions, incentive) business is the core foundation of the business in urban destinations such as ours. Business events represent up to 40% of tourism revenue in Canada⁵, book up to several years in advance, and help to reduce seasonality with a focus on the off-peak season. Meetings delegates are the highest spending segment all of travel due to the additional investments of creating and executing conference and incentive programs; delegates are typically travelling on expense accounts, which allows for more discretionary spending.

Greater Victoria has had a strong meetings recovery from 2022-2024 and 2025 continues to demonstrate a very strong pace. This provides a strong foundation for the year ahead. Although it will take work across Canada to capture 2026 business, Destination Greater Victoria’s Business Events team is actively pursuing 2026 business with several programs pending contract execution.



Increased Focus on Seattle Market

One of our key areas of strategic strength over the past years has been to remain focused in our key source markets. As guided by research and consultation with member businesses, Destination Greater Victoria’s source markets of investment for integrated marketing communications have been:

- Greater Vancouver
- Seattle/Tacoma
- Calgary
- Metro Toronto
- San Francisco and Bay Area

In 2024, Destination Greater Victoria introduced a limited investment in earned media and public relations in London, United Kingdom.

⁵ Source: Meetings Means Business Canada Website: Advocacy Tools

Throughout the 2024 business year, it became evident that more upside potential remained in our critically important source market in Seattle. Destination Greater Victoria is exploring opportunities to increase our presence in Seattle along with partners who are also vested in the market with the objective of raising the Greater Victoria tourism brand on an ongoing basis.

Access Development

Air Route Development

To further the development of air routes and increase the frequency of current ones, we will allocate resources aimed at attracting new routes through collaborations with airlines and bolstering marketing and promotional efforts to raise awareness of new flights. Over the last year, we have seen existing routes become stronger and passenger numbers at YYJ rise. We are committed to continuing our efforts to support and enhance these advancements.

Another effective way to support air route development is by hosting major airline industry conferences. This move will elevate Victoria's profile among key airline executives and highlight what the city has to offer. Potential events to host include the CAPA Airline Leader Summit, which usually draws CEOs or chief commercial and operations officers, and TakeOff, which brings together the North American domestic air service development community and targets airports handling fewer than 10 million passengers. Hosting these conferences allows us to directly engage with airline decision-makers, providing them with firsthand experience of our destination and encouraging investment in new air routes.

Marketing Partnerships with International Ferry Operators

In 2024, DGV, with resources through the Victoria Hotel Destination Marketing Association (VHDMA), entered into MOUs with both Black Ball Ferry Lines (operators of MV Coho) and FRS Clipper to provide marketing resources for programs that generated measurable hotel stays. The intended outcome was to ensure the success of our valued international ferry operators as they recovered from the effects of the pandemic.

The incremental funding was leveraged for the MV Coho to showcase its hotel and ferry packages along the I-5 corridor, including innovative OTT (Over-The-Top) features like iHeart Radio and Amazon shopper audiences. For FRS Clipper, the funding broadened their Spring Hotel + Travel Package Sale. Clipper's campaign included elements such as Seattle Times, PBS spots, Meta ads, Google display ads, and an influencer campaign with The Emerald Palate.

Investing in these marketing efforts was deeply valued by our ferry operators during their recovery phase. It is DGV's perspective that both operators have shown positive results, with Black Ball Ferry Lines' efforts being particularly effective. Partnering with our ferry operators has proven to be invaluable for the overall visitor economy, providing mutual benefits and continued growth potential.

Cruise Business and Investment

All stakeholders in the visitor economy are delighted to see the return of the cruise business after the pandemic, particularly with the political risks posed during the period of border closures and threats of legislative changes to avoid Canadian ports on some Alaska itineraries. 2025 will mark a milestone with

limited disembarkations from a cruise line in Victoria leading to initial, albeit modest, overnight visitors directly attributable from the cruise segment.

Cruise business is growing worldwide and has strong prospects for the future for a variety of reasons, including its relative perceived value or price certainty compared to other travel segments. The Alaska theatre remains a stable and mature cruise theatre with robust prospects in the medium term.

We acknowledge there have been some challenges related to how cruise business has interfaced with the destination ashore in 2024. Destination Greater Victoria has heard the concerns from valued members and is pleased to be working with the Greater Victoria Harbour Authority (GVHA) on a new strategic focus and partnership investment in cruise.

Working in lockstep with the GVHA, we look forward to exploring potential collaborations and support for the cruise industry in the destination through a range of tourism-focused initiatives. Included in these initiatives are:

- Creating a shopping program designed to benefit local businesses
- Exploring options for developing pre- and post- cruise itineraries that encourage cruise lines to promote longer stays in Victoria.

To assess opportunities within the cruise industry and evaluate passengers' likelihood of returning, surveys will be developed to gather relevant information from cruise passengers. Overall, this strategy aims to foster stronger connections with the cruise industry and enhance its contributions to our tourism infrastructure.

Environmental Scan

A PESTEL analysis is a framework or tool used to analyse and monitor the macro-environmental factors that may have a profound impact on the organization's performance.⁶ For 2024, PESTEL considerations include:

P – Political: Elections will take place in British Columbia and the United States in the fall of 2024. The current Government of Canada, operating as a minority government, is teetering at the time of writing this business plan. In 2025 it is possible there will be broad political change in the jurisdictions that DGV operates in and markets to.

E – Economic: After a period of macroeconomic tightening from 2022-2024, which followed record stimulus during the pandemic years of 2020-2022, both monetary and fiscal policy are starting to ease in late 2024 heading into 2025. This should provide some assistance to households and businesses in the next two years.

S – Social/Societal: Continuing the trend outlined in DGV's 2024 business plan, war and conflict remain a feature across the globe. This element of safety and security makes the Pacific Northwest an area of considerable attractiveness for travel.

T – Technological: Building on remarks in 2024, the role of artificial intelligence (AI) has arrived. Destination Greater Victoria is working to incorporate AI into its workflow with a goal of streamlining routine tasks and improving customer service.

E – Environmental: Sustainability and regenerative travel remains at the centre of both customer and government stakeholder expectations. Adaptation and mitigation to climate change threats is now a front and centre reality of tourism operators around the world.

L – Legislative: The increasing focus on indigenous relations, the United National Declaration of the Rights of Indigenous Peoples and various proposed legislations around indigenous relations, along with ongoing treaty negotiations will ensure that indigenous communities will increasingly be both partners and significant vested stakeholders and owners in the visitor economy.

⁶ "Scanning the Environment, a PESTEL Analysis" Business Tools to You, Online Edition. September 2016

Fourth Year of a 2022-2026 Business Plan

Destination Greater Victoria operates under the Municipal and Regional District Tax (MRDT) system in the province of British Columbia and partners with the two largest municipalities in the Greater Victoria region on the MRDT program, Victoria and Saanich.

In Victoria, Destination Greater Victoria is the eligible entity under the MRDT system. A three percent tax rate is applied on accommodation stays and Destination Greater Victoria currently has a mandate from 2022-2026. In Saanich, the District of Saanich is the eligible recipient of the MRDT resources, and a two percent tax rate is applied. Destination Greater Victoria completed a fresh Memorandum of Understanding with the District of Saanich in 2024, modernizing and clarifying our relationship.

Destination Greater Victoria is currently under a five-year strategy with four over-arching strategic objectives. This section of the business plan will provide and update and context for the 2025 business year as to how these apply.

1. Recover from COVID-19 quickly and efficiently

Based on a variety of metrics, both the destination of Greater Victoria and Destination Greater Victoria as an organization have recovered completely from COVID-19. Accommodation revenues have recovered and surpassed 2019 levels, this summer Victoria International Airport arrivals reached a point of recovering to 2019 levels, and conference centre delegate days are now returning to normalized patterns. Destination Greater Victoria membership levels are close to returning to pre-COVID levels or will fully return by the end of 2024. Some long-haul international source markets, such as China, Japan and Mexico have not fully recovered, but other gains have been made. While the long-term damage related to COVID-19 remains on the balance sheets of many of our member business, it is now time to look forward, with the COVID-19 pandemic in the rear-view mirror, on to fresh objectives to serve our community.

2. Set the tone for the visitor economy to operate in line with values of our community

Over the past number of years, Destination Greater Victoria has embraced a suite of sustainability initiatives that have helped to drive not only community engagement but also strong rankings in brand-elevating and business-driving rankings, such as the Global Destination Sustainability (GDS) Index. For 2025, DGV will work to move its planned circular economy at scale from idea, to completed strategy and into action.

Destination Greater Victoria has three official charity partners – Wear2Start, Peninsula Streams Society, BC Hospitality Foundation – and undertakes a variety of community-focused initiatives with partners such as the Peninsula Streams Society and Soap for Hope.

In addition, Destination Greater Victoria is getting more engaged with the community with a more focused effort to share the positive benefits of the visitor economy. This is achieved by leveraging the platform of community events that Destination Greater Victoria has sponsored for many years, as well as by driving a sustained communications efforts.

3. Focus on higher-yield, year-round customers in all target segments

For many years, Destination Greater Victoria has focused its leisure marketing activities on higher yielding leisure customer segment through focus on target census metropolitan areas that are thriving along with diligently marketing against three target customer “personas” or psychographic profiles that offer the most promise. In times of economic struggles, such as what we are going through now, higher yielding customer segments are more resilient economically and more apt to travel.

Business events, including meetings and conferences has been a strategic focus for many years because of the high in-destination spend of conference delegates and the off-peak season economic activity that they drive. In 2024, successful inroads into the very lucrative niche of the meetings business, specifically the incentive market has borne fruit with significant programs starting to write contracts for future years. These programs bring millions of dollars of new revenues into our community and represent a new segment of business. As highlighted in the Business Events portion of the plan, Destination Greater Victoria will aggressively look to build on the foundations of this lucrative segment.

4. Support our member businesses and communities

Destination Greater Victoria will continue to support our member businesses. In 2024, it became apparent that many members were keen to understand how the cruise business can benefit the community more broadly. This topic gained attention for a variety of reasons, and Destination Greater Victoria is actively engaging with the Greater Victoria Harbour Authority to explore these opportunities. We are committed to partnering with the GVHA, bringing our own investment and capacity to the table to create a more positive impact and improve the cruise experience for everyone involved.

Stemming from the work of the Destination Master Plan process, there is great interest in exploring the many benefits of the visitor economy and partnering with Destination Greater Victoria in a more fulsome and strategic manner. Two examples include:

- Gorge Area Tourism Plan – to commence in 2025
- Saanich Peninsula Tourism Plan – development well underway with Saanich Peninsula stakeholders

Foundations of the 2025 Business Plan

Destination Greater Victoria operates under objectives of a five-year 2022-2026 Strategic plan which is linked to its MRDT funding cycle. While these overarching objectives remain relevant at a high level, each fiscal year has an evolving business environment and as such Destination Greater Victoria identifies annual business plan foundations to provide additional focus for that business year. The foundations for the 2025 fiscal year are identified below.

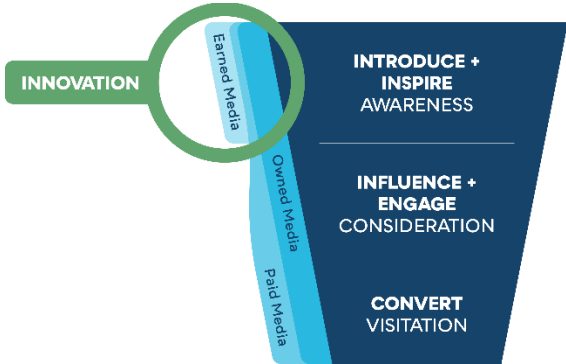
Consolidate Recent Business Gains

2024 was a successful year for the visitor economy of Greater Victoria. At the time of the writing of this business plan, (August 2024 data received) accommodation revenues were up year to date 14%, Greater Victoria’s iconic attractions reported a very strong year, and many other sightseeing attractions and similar reported flat years over 2023. Cost pressures and other concerns are negatively affecting some retail and restaurants, causing some closures. However, conversations with these operators make it clear that the visitor economy continues to deliver, aside from concerns related to later cruise ship arrivals. At the time of writing this business plan, Destination Greater Victoria is forecasting a 14-15% increase in revenues in 2024 over 2023.

In consultation with our hotel partners over the summer budgeting season for these businesses suggest that an appropriate business and revenue target is to set a 2025 budget at 2024 fiscal year end plus 4%. That is in line with the accommodation sector, the resourcing partner, have shared are their business targets next year and, if successfully achieved, will keep Destination Greater Victoria ahead of the inflation.

Continue to Drive Strong Destination Awareness

Destination Greater Victoria has successfully taken a business approach of leading its promotional efforts with a focus on earned media, including travel and lifestyle media, and public relations. Destination Greater Victoria is significantly out-resourced by competitors and cannot advertise its way to success. Paid advertising is primarily resourced by DMF partners through the Victoria Hotel Destination Marketing Association which is focused on short and medium haul markets. This has proven very successful; keeping the momentum up in terms of strong destination awareness through significant earned media coverage and destination accolades, where possible, is foundational to success.



Foundations of 2027-2031 MRDT Plan Process

Destination Greater Victoria is entering the fourth year of its 2022-2026 MRDT plan. Foundational work for the 2027-2031 five-year strategy required for MRDT renewal will take place next year and must be completed by late in the year to ensure approvals and submission ahead of the June 30, 2026, deadline. Destination Greater Victoria has also just completed and is about to launch a ten-year Destination Master Plan. It stands to reason that some of the priorities in the Master Plan will transfer into the 2027-2031 five-year plan, rounded out by marketing and sales additions. To prepare for this process, Destination Greater Victoria is currently updating, or will soon update, foundational research and data to provide insights, public policy evidence, and a statistical basis for the resourcing renewal process.

Getting Clear on FIFA Opportunity

The 2026 FIFA World Cup will be held in 16 cities in Canada, USA, and Mexico. FIFA World Cup presents both opportunities and risks for the business in 2026 and beyond. Destination British Columbia has created a strategy to leverage the 2026 FIFA opportunity. Major global sporting events provide both exposure for destinations for brand acceleration over the medium and long term, and also constrain travel in the short term due to the aversion effect – perceptions of crowding, security concerns, expensive hotels. Further, Victoria and other destinations in BC were promised significant business growth due to the 2010 Vancouver Olympic Games. Unfortunately, these benefits did not materialize in 2010, resulting in a disappointing year. This experience has led to a guarded approach locally.

Destination Greater Victoria is exploring opportunities across four dimensions, all of which will require little if any investment, aside from effort over the next two years.

1. Explore Spill Over Opportunities from Vancouver: It is widely understood that Vancouver does not have sufficient commercial accommodation for both FIFA related business and traditional business that occurs each summer for leisure. Hence, Destination Greater Victoria will work constructively with Destination Vancouver to see how it may be able to assist, for the year, with any spill over opportunities.
2. Hosting Dignitaries and Protocol Trips to the BC Capital: Major sporting events such as World Cups and Olympics host significant diplomatic missions on the margins of them. Destination Greater Victoria will develop ready-made itineraries and prepare with connections and accommodations providers to be ready for pre-arranged travel plans. This preparation ensures the province's capital is showcased in the best way possible, while driving incremental business.
3. Guerilla Marketing to Supporter Clubs/Fans: Once it is known which teams will be playing in both Seattle and Vancouver, Destination Greater Victoria plans to prepare low cost, guerilla marketing to the supporters of the teams that will be playing. Our aim is to work with transportation partners (e.g. FRS Clipper, Kenmore Air, Harbour Air, BC Ferries, etc.) to position Greater Victoria as a great getaway between games that they have travelled to see.
4. Supporting Destination British Columbia on Media Familiarizations: There will be travel media hosted in conjunction with FIFA 2026 with an intent to spread awareness through the province. Destination Greater Victoria will support these efforts with exemplary hosting.

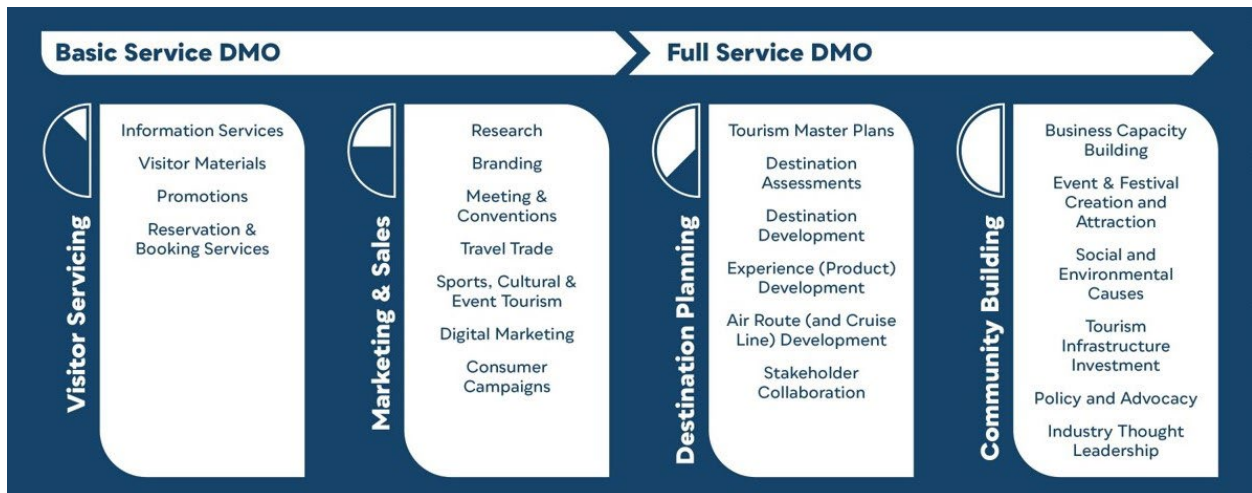
5. Supporting Regional Travel Efficiency: Destination Greater Victoria will continue to stay plugged in with Pacific Northwest Economic Region (PNWER) in order to support and be informed on efficiency in travel, including PNWER's "Know Before You Go" Travel Portal.

The above are high level ideas that will continue to be refined over the year ahead.

Organizational Priorities

Destination Greater Victoria – A Full Service DMO

Destination Greater Victoria is a full-service Destination Organization that is highly developed on both the destination promotion and destination stewardship skills and expertise. This is consistent with all large urban DMOs in North America that serve their communities holistically. Greater Victoria as an urban gateway to British Columbia. The full range of services is highlighted below.



Community Values

Community values are at the heart of everything DGV does. Our local residents are, after all, our ultimate customers. Central to our community's ethos is sustainability. In 2024, DGV was honoured to be featured as a case study in Destinations International's 2024 Catalyst Report, which recognized and quantified DGV's efforts in this area as world leading. We plan to continue this meaningful work in 2025.

Initially, our focus on sustainability served to reflect community values, but it has since evolved into something much deeper. We are committed to building a place where people want to visit, as it is the foundation of creating a community where people desire to live. Destination Greater Victoria's work is an ongoing cycle of growth and development in line with community values, and our goal is to keep the momentum going. We take seriously our responsibility to promote Greater Victoria as an attractive travel destination by enhancing its public image as a dynamic place to live and work. By creating a place where residents and businesses want to invest, we ensure that Greater Victoria remains a vibrant and thriving destination. This holistic approach ensures that Greater Victoria is not just a great place to visit, but a place where people want to live, work, invest, and stay.

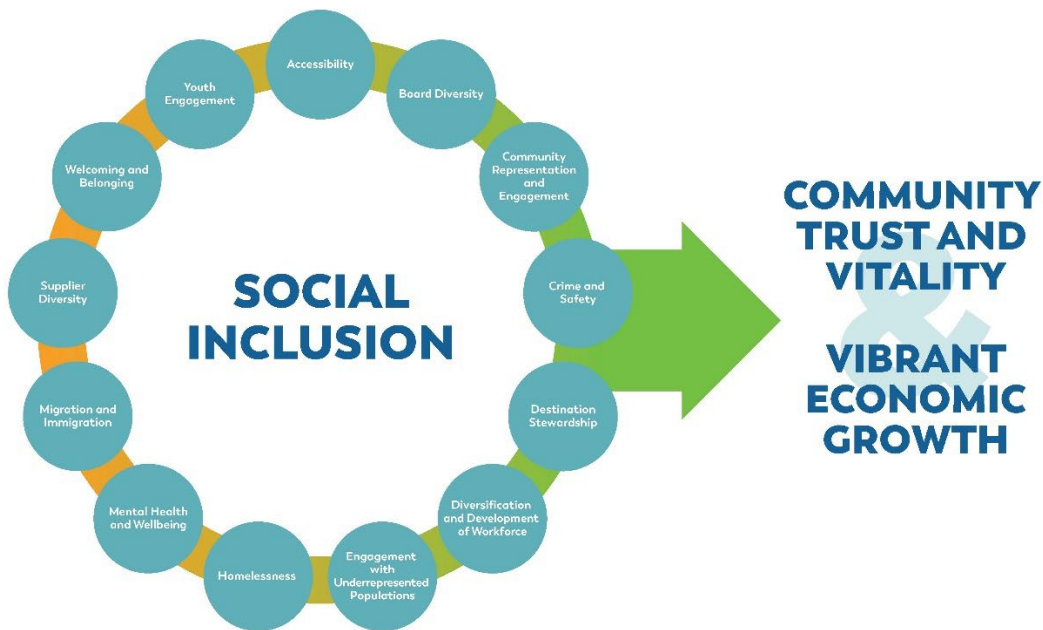


THE WORK OF A DESTINATION ORGANIZATION



Equity, Diversity, Inclusion, and Accessibility (EDIA)

As part of our strategic plan, we have progressed our efforts in the realms of Equity, Diversity, and Inclusion, with the additional focus on Accessibility. We will continue to offer appropriate learning opportunities for both staff and members in this area. A primary goal is to continue to foster and uphold an inclusive environment, which involves collaborating with the City of Victoria on initiatives like the Welcoming Sticker program. Our work continues to align with Destination International’s Social Inclusion Framework, which aims to support communities and bolster the economic health of destinations by ensuring they are safe and welcoming for all.



Destination International's Social Inclusion Framework

Lean and Scalable

Destination Greater Victoria continues to employ a lean and scalable business model. By keeping overheads slightly below industry standards, Destination Greater Victoria can ensure an appropriate amount of resources are focused on demand building and destination stewardship activities.

Destination Greater Victoria's labour ratio is currently budgeted at 31% of revenues, several percentage points below industry standards. This is achieved by outsourcing some functions through contracts that can scale up or scale down based on revenue cycles.

Artificial Intelligence

The power of artificial intelligence is reshaping workplaces. Artificial intelligence comes with some risks but those who do not work to leverage its power will be left behind as competitors can be much more efficient with labour inputs. In 2024, Destination Greater Victoria implemented governance principles, equipped the team with tools (e.g. – Microsoft Co-pilot) and started to use AI in terms of researching and drafting. In 2024, the intention is to lean in more deliberately. A leading advisor has been retained to work with DGV to incorporate AI into our business workflows starting with responses to common questions in several areas along with speeding up document and presentation creation.

BUSINESS ACTIVITIES

Consumer Marketing and Travel Media

STRATEGY

One of DGV's strategic objectives is to focus on higher-yield, year-round customers in all target segments. 2024 was a year that included several new elements in the Marketing Communications area. For 2025, our focus is on optimizing many of those initiatives, to realize associated performance growth.

Key research from MMGY's Portrait of the American Traveler 2024 informs us that while the price of travel has grown over the past few years, travel continues to be a priority, as people focus on experiences and memory making. Continuing to land the emotive and experiential drivers for Victoria will help ensure that Greater Victoria continues to be seen as a compelling, year-round destination.

We have focused on growing brand awareness and endearment of Greater Victoria through a combination of earned, paid, and owned media. We will continue to strategically deploy resources against the biggest opportunity markets and segments within our identified geographies and personas, staying the course on our North American markets, and formally adding the UK within our purview for earned media.

We know the customer journey is not linear, and recent research from Expedia identifies that the average Canadian traveller views 133 pages of travel content and spends 287 minutes with travel content in the 45 days prior to booking⁷. Optimizing our website for organic search, and partner referral will remain the key areas of focus in 2025.

Continuing to be guided by data and acquiring first party data are essential to remaining competitive. In 2025 we'll use data from the digital experience platform (DXP) to hone personas, creative, targeting, messaging and access look-alike audiences.

In 2024, Google raked up the cost per click (CPC) associated with many search terms. And while our astute agency partner has worked to minimize impacts, it remains important to leverage our owned channels (social media, blog, e-newsletter) and grow our presence through collaboration in an environment of increased CPC.

Finally, artificial intelligence (AI) has been buzzing, and it is expected to play a significant role in future years as well. Finding efficiencies through AI will allow us to stretch our internal capacity and focus on areas where we can genuinely add human value, where AI tools currently fall short – such as in-depth market insight and a local perspective that we can incorporate into our creative assets and communication, as well as relationship building with media and partners.

⁷ Expedia Group Path to Purchase Study, 2023

Marketing Business to Consumer (B2C): Advertising, B2C promotion activity and content marketing

STRATEGY

Destination Greater Victoria launched a new consumer website (tourismvictoria.com), and while much optimization activity has taken place in 2024, there remain opportunities to continue to refine the platform and specific executions related to partner referrals in 2025.

One such optimization for 2025, is to sunset the Check In Canada referral engine, and replace that with the Ripe solution. Ripe has a more contemporary UX and offers the opportunity to run a booking option related to Business Event room blocks, Sport Tourism events and Major Events such as Dine Around and Stay in Town.

With the new website launch, a digital experience platform (DXP) called Control Tower was added to the site. This aims to provide a personalized website experience and to capture important data that can be used to enhance content or customer journey, as well as fortify advertising activities such as look-alike audiences. With nearly a full year of data now available, we intend to revisit our personas and content considering insights available through Control Tower.

In 2024, Destination Greater Victoria's marketing efforts yielded good results, particularly out of the Washington state and northern California markets. Continuing to focus on, and invest in these markets, is a key strategy in 2025. A media property/notable out-of-home presence in the Seattle market is being sought to help cement Victoria as top-of-mind with both locals and visitors in Seattle.

From a creative perspective, we saw strong results from our 2024 campaign and intend to stay the course on that creative. Insignia research conducted in the western Washington market, showed:

- 58% aided advertising recall, which is well above the industry norm of 17%, and ahead of 2019 (45%).
- 26% unaided awareness, which is up from 22% in 2023.
- After seeing or hearing the Victoria ads, 85% stated they are now more likely to visit Victoria, highlighting strong campaign reach and relevance to audience.
- 22% of prospects advanced along the path to purchase.

Media buying executed by MMGY Global in the US has performed well, hitting all key benchmarks; leading into the fall period, Canada paid search, display, and social were all moved to MMGY. This change will be maintained in 2025.

Destination Greater Victoria plans to continue with two core campaigns in 2025, supported by evergreen/always on. We'll also maintain our Flavour Trails™ campaign but operate this outside of the Destination BC Co-operative Program.

In 2025, Destination Greater Victoria will continue to target high-value, fully independent travellers (FIT) and transient segments identified by our personas:

- Nested Independents: Couples aged 55 and older who have flexible schedules and discretionary income to enjoy an array of activities, including cultural activities, and longer stays.

- Coastal Culturalists: Millennials and couples who place a high value on local experiences and food offerings. Coastal Culturalists often travel in the off-peak to maximize value and stretch their dollars.
- The Young with the Restless: These are parents travelling with children. They build itineraries and memories that put their children first. Their disposable income can range from high to moderate.

Destination Greater Victoria will continue to focus on its core markets on:

Canada

Vancouver and the Lower Mainland
 Calgary
 Metropolitan Toronto

US

Seattle & the I-5 corridor
 San Francisco/northern California

Select tactics may be extended to include Edmonton and Portland.

While our campaigns and associated media buys will focus on driving and extending peak periods, we have actioned a new initiative for Q1 2025, to help drive leisure visitation during the traditionally slower period of early January. A health and wellness program is being developed, titled “Intention”. that will be promoted in late 2024. With a handful of events produced by Destination Greater Victoria as anchors, the program allows for members and partners to showcase their offerings, and guests to curate a health and wellness getaway perfect for them. Advertising support will be focused on the Lower Mainland, Seattle and up-Island.

Destination Greater Victoria will continue to lean into its owned channels, including the Destination Greater Victoria blog, e-newsletter, and social channels. We’ll continue to look for efficiencies and leveraging AI to maximize our output and performance in this area.

Key activities and tactics for 2025 include:

- Drive visitation to Greater Victoria with key seasonal campaigns, supported by always-on presence, with a focus on extending peak periods into traditional off-peak.
- Maintain “Be Moved” creative, making small changes associated with seasonal imagery.
- Address January low-season with a new health and wellness program – gather learnings with the goal to make it annual into 2026.
- Continue to explore a media property in Seattle for continuous presence in a high traffic area with memorable creative.
- Step away from the Destination BC Co-op program, with its new two-year intake, and enhanced requirements, to run the Flavour Trails campaign without the matched funds.
- Continue to optimize the new website and enhance hotel referrals through the new Ripe referral engine; grow sessions with new initiatives such as a webcam addition.
- Dig into data offered by the Control Tower DXP, to fine-tune content, messaging, landing pages and personas.
- Strategically increase Destination Greater Victoria’s social media following, engagement, and e-newsletter database. Build upon the established Content Ambassadors who can help share a local’s perspective through reels content, collabs and blog.

- Use AI to action efficiencies to stretch internal capacity, to allow for additional focus on YouTube and exploration of TikTok.

Travel Media: Identifying and pitching media outlets, journalists, and content creators.

STRATEGY

Travel Media activity is core to Destination Greater Victoria's top-of-funnel activity. Compared to other DMOs, it is an area where we invest proportionally more. We will maintain this long-term strategy in 2025, as we continue to cultivate media visits and stories to showcase Greater Victoria to key audiences in different publications and through different lenses.

As an extension of our earned media, we have also invested in paid productions and will continue to pursue paid productions in 2025. These productions aim to connect differentiating messages with audiences in our key markets. Often, these productions have long lives, with multiple airings in several environments, enhancing their value.

Our agency partnerships have proven to be extremely valuable in connecting us with top journalists and ensuring Greater Victoria is included in story pitching activity. In 2022, Destination Greater Victoria began a relationship with MMGY Global's US public relations arm. This team spearheads Destination Greater Victoria's US travel media efforts. In the back-half of 2024 we executed a six-month trial with the UK PR arm of MMGY, which yielded a four-journalist in-market FAM and several story placements. We plan to continue these relationships that are delivering in 2025.

The Travel Media team will continue to focus on building relationships and securing quality earned coverage online, in print, on radio, through social channels and on television. While part of the team's efforts will remain responsive, we continue to proactively reach out to journalist and creators to develop stories that actively promote Greater Victoria's destination brand. Identified themes and stories that will set Greater Victoria apart include sustainability, culinary, family-friendly, pet-friendly travel, and health and wellness.

Destination Greater Victoria will continue to work with the Destination BC Travel Media Team and access their Visiting Journalist Program to help offset journalist travel costs.

Key activities and tactics for 2025 include:

- A successful media event was executed in New York in 2024. In 2025, Destination Greater Victoria will execute one in Seattle.
- A new agency relationship was established with MMGY UK's PR firm, Hills Balfour. In 2025, we will build on that relationship for additional pitching and story generation in the UK market.
- Continue to collaborate with Destination BC and Destination Canada where possible to maximize exposure and access cost saving opportunities.
- Continue the relationship with MMGY US's public relations firm in Los Angeles to drive strong results within the US market.
- Continue to participate in media missions into key markets with the DBC, Vancouver, Whistler travel media partnership (Toronto, California, Texas and possibly New York) in 2025.
- Attend key conferences such as Travel Classics to create new relationships and maintain established ones. Of note: International Media Marketplace and Travel Media Association of Canada will be attended every other year.

- Explore bringing in one major media vendor or production in 2025 – such as Fly Brother or Outside Magazine/online.
- Acknowledging the way people consume content, bring in at least one podcaster in 2025.
- Working with Destination BC, identify media hosting opportunities to maximize potential of FIFA media in 2026.

Evaluation/Key Performance Indicators

- Marketing Campaign ROI
- Sessions on tourismvictoria.com total digital platform
- Travel media and influencer placements

Business Events Victoria

Business Events Victoria (BEV) is the division of Destination Greater Victoria responsible for all aspects of meetings, events, and conferences at the Victoria Conference Centre (VCC). BEV also facilitates events at the other attractive venues Victoria has to offer, such as castles, wineries, boats, and galleries.

BEV's services and responsibilities include sales and marketing, bid assistance, accommodation booking, group booking, meeting planning, travel assistance, incentive programs, attendance building, vendor coordination and more.

STRATEGY

With the intention to reduce seasonality in Greater Victoria's visitor economy and support member businesses, Business Events will continue to increase its brand awareness and recognition in the market to attract and retain its target customers and to communicate its value proposition and competitive edge. A key focus for 2025 will be driving new lead opportunities in targeted market segments. We will continue to focus on our core markets of corporate and association meetings. A specific area of focus is the Incentive Market. Building on the achievements of this year's Incentive Client Focus Group, the ideas developed will aid in forming a strategy aimed at drawing more opportunities from this segment.

A key component in generating leads and boosting awareness involves actively participating in tradeshow and events within our geo-markets. The team will undertake various efforts to promote Victoria in these areas. The goals of these initiatives are to elevate Victoria's reputation and brand recognition in the business events sector, expand its customer base and services, and increase its market share.

Key activities and tactics for 2025 include:

- Integrated marketing campaigns focused on key segments and geo-markets.
- Drive new lead opportunities in targeted market segments.
 - Association Segment – host Canadian Society of Association Executives National Conference to bring key decision makers to experience Victoria.
 - Incentive Segment – host Destination Canada's Incentive Summer Program to bring global incentive travel buyers to Victoria to showcase the city's unparalleled offerings.
 - Third-Party Partnerships – activate partnerships with key intermediaries and hosting FAMs for focused intermediary groups and clients.

Victoria Conference Centre (VCC)

Local Host Program

- Partner with local community, business, and academic thought leaders to host a lunch-and-learn or networking reception styled event to introduce them to our Local Host Program and the Destination Canada International Convention Attraction Fund (ICAF). Engage these leaders in promoting the advantages of hosting events within their own city.
- Update and refresh Local Host digital assets and expand the digital presence of the program.

- Work with local community, business, and academic leaders to expand their knowledge of Destination Canada’s expanding Canadian Visionary Network (CVN) and how it could benefit their own networks.

Marketing

- Create an online marketing toolkit for VCC clients that helps educate them on how to better resource and finance their conference by suggesting strategies and tools to improve delegate engagement, increase revenue and develop positive delegate experiences.
- Refine current VCC website to improve user navigation experience and interactions.
- Crystal Garden 100th Anniversary – activation and promotion.

Geo-Markets

All of Canada, with a focus on:

BC – Vancouver, Victoria
 AB – Calgary, Edmonton
 ON – Toronto, Ottawa
 QC – Montreal

All of U.S. with focus on:

WA – Seattle
 CA – San Francisco
 Midwest (Incentive Houses)

Tradeshow / Events

Trade show/event	City	2025 date
GM Mission Client Events	(Toronto Ottawa/Montreal/San Francisco/Seattle)	Q2 and Q4
Canadian Society of Association Executives (CSAE) Tete-a-Tete & Destination Direct	Ottawa	Feb 24-27
MPI Northern California Expo	San Francisco	March 3-5
Vancouver Client Event	Vancouver	March
M&I Luxe	Banff	March 24-27
SITE ISA	Vermont	April 1-4
Venue Series	Vancouver	April
IMEX Frankfurt	Frankfurt	May 20-22
Incentive Research Foundation Invitational	Cancun	June 1-4
Prestige Event	Seattle	TBC
CanSPEP Conference	Kingston	June 23-27

Trade show/event	City	2025 date
HelmsBriscoe Annual Conference	Toronto	June 28-30
Destination Canada Incentive Canada Summer	Victoria	July
ASAE	Los Angeles	Aug 9-12
Canada Meeting & Event Expo (CMEE)	Toronto	August 12-13
SITE Classic	Maui	August 25-28
Venue Series	Calgary	September
Executive Travel Show	Vancouver	September
MPI The Event	TBC	Fall
MPI Ottawa Prix Prestige	Ottawa	Fall
IMEX AMERICA	Las Vegas	October
CSAE National Conference	Victoria	Oct 21-25
CONNECT West	TBC	TBC
PCMA Canadian Innovation Conference	Toronto	Nov 16-18
IBTM	Barcelona	November
MPI & CSAE Holiday Events	Toronto/Vancouver	December
Smart Meetings Incentive	TBC	December

Evaluation/Key Performance Indicators

- Business Events confirmed room nights
- Victoria Conference Centre Revenue
- Victoria Conference Centre delegate days

Travel Trade

Travel Trade is the distribution network between domestic and international buyers and sellers of travel products and services. It includes tour operators, wholesalers, travel agents. The role of the Travel Trade team is essential in connecting destinations with potential visitors, thereby boosting bookings and expanding market reach and awareness. Destination Greater Victoria supports Travel Trade business-to-business (B2B) relationships through partnership program support, joint marketing agreements and in-market support.

STRATEGY

Now that the destination has effectively recovered from the pandemic, Travel Trade will focus on furthering strong partnerships within the travel industry, with tour operators, wholesalers, and travel agents, and leveraging these relationships to promote overnight itineraries to the destination. There will be continued efforts to collaborate with key consortia programs to create targeted campaigns and promotions aimed at potential visitors. The Travel Trade team has been focused on partnerships with consortia programs such as Signature Travel and Alberta Motor Association to generate room nights and will continue to refine and partner with new consortia programs to drive results.

Alongside consortia programs, another key objective is to promote more FIT travel and increase overnight stays, particularly in the off-peak seasons of spring and fall. There is potential here to work with travel agencies that can bring these opportunities. Ongoing training and educational initiatives will be offered to travel agents to familiarize them with the destination's attractions and unique year-round experiences.

Key activities and tactics for 2025 include:

- Host FAMs from our primary markets, evaluate potential opportunities to partner on FAMs with Destination BC and Destination Canada to drive opportunities from our key markets.
- US sales mission with member partners to the Los Angeles market.
- Attend key industry trade shows, joining efforts with other Victoria members to leverage more opportunities to develop awareness and tour programs to the destination.
- Partnerships with consortia programs with key partners (Signature, Alberta Motor Association, Travel Leaders) that drive room nights.
- Investment in co-op marketing opportunities to leverage increased exposure in key markets through effective campaigns.
- Partnership with travel agencies focused on high value travellers to create awareness and drive room nights to the destination.
- Webinars and training programs to educate and create awareness of Victoria and its products to our targeted clients.

Geo-Markets

Based on research from Destination BC and Destination Canada, these are our geo-markets:

Primary Markets

1. Canada
2. United States
3. United Kingdom
4. Australia

Secondary Markets

1. Mexico
2. Germany
3. China
4. South Korea
5. Japan

Tradeshow / Market Development

Tradeshow/Marketplace	Location	2025 Date
Go West Summit	Palm Springs	January 6-9
Explore BC		February
Explore Vancouver Island		April
LA Sales Mission	Los Angeles	Spring
Helloworld – Pre FAM	Victoria	May 19-21
Helloworld	Vancouver	May 22-24
Rendez-vous Canada	Winnipeg	May 27-30
Focus Canada – Australia	Australia	September
Signature Travel	Las Vegas	November
Alberta Motor Association (AMA) Event	Edmonton	December
US Tour Operators Association (USTOA)		December

Evaluation/Key Performance Indicators

- Consortia, Travel Trade, marketing partnerships room nights

Major Events and Conferences

Destination Greater Victoria executes and sponsors major events that align with the destination's business objectives. These events drive hotel room nights, engage the community, and bring positive economic impact to the destination.

STRATEGY

Destination Greater Victoria retains an ownership stake in the planning and execution of a variety of major events and conferences including Dine Around and Stay in Town, and IMPACT Sustainability Travel & Tourism Summit (IMPACT). Participation in these activities aligns the visitor economy with the values of our community.

Key activities and tactics for 2025 include:

- Dine Around and Stay in Town - The city's best-known culinary festival, Dine Around and Stay in Town Victoria, involves the collaboration of several restaurants and hotels in Greater Victoria. Restaurateurs offer fixed, multiple-course experiences ranging from \$25 to \$75. Local hotels also participate by offering discounted deals on room bookings. In partnership with the BC Restaurant and Food Services Association (BCRFA), this event drives restaurant and hotel business during the off-peak season. It is an annual event with strong interest from visitors and residents alike. The 21st edition of Dine Around and Stay in Town runs January 24 to February 9, 2025.
- IMPACT Sustainability and Travel Tourism Summit - IMPACT Sustainability Travel & Tourism Summit (IMPACT) is presented by a partnership between Destination Greater Victoria, Synergy Enterprises, Tartanbond and Starrboard Enterprises. As the pre-eminent sustainable tourism conference, IMPACT's mission is to drive, inspire, and demonstrate innovative and collaborative sustainable solutions for positive tourism development across Canada. 2025 will see IMPACT entering its eighth year as it continues to enhance our destination's profile and commitment to sustainability. IMPACT 2025 will be held from January 27 to 29.
- Northwest Deuce Days - Northwest Deuce Days is the successful and popular classic car show. Previous owner Al Clarke built a small community car show into the largest gathering of Deuce Coupes in the world. 2025 will see Destination Greater Victoria continue this legacy as the new owners of this community asset and continue preparations for the next event. Northwest Deuce Days is held every three years. The next show will be held from July 17 to 20, 2025.

Evaluation/Key Performance Indicators

- Registration and economic impact

Greater Victoria Sport Tourism Commission

The Greater Victoria Sport Tourism Commission (GVSTC) has solidified its role as the primary point of contact for provincial, national, and international sporting events in the Capital Region. In 2024, the GVSTC provided sponsorship support for 30 events, showcasing our ongoing commitment to fostering both established and emerging sports events that draw visitors to our region. These initiatives continue to energize Greater Victoria while also creating meaningful engagement opportunities for local youth.

STRATEGY

Our strategy centers on positioning sport tourism as a critical driver of visitation to Greater Victoria. With a world-class hosting infrastructure set against our stunning natural backdrop, the region is ideally suited to attract a diverse array of sporting events. Guided by our Sport Tourism Strategy, we remain dedicated to setting the tone for the visitor economy in this arena, enhancing Greater Victoria's image as a premier destination for sports events and community engagement.

GVSTC will continue leveraging our three-pillar approach to secure high-profile events and bolster our established annual calendar.

Key activities and tactics for 2025 include:

- New Events & Foundational Annual Events
 - Supporting both emerging events and long-standing fixtures in the regional sports landscape.
- Tentpole Events
 - Pursuing high-impact events that elevate the community's profile on national and international stages.
- Sport Tourism Express Program
 - Facilitating streamlined support for local and provincial events, encouraging growth and sustainable development within the sector.

Our focus is on maximizing return on investment while fostering economic growth and enhancing the reputation of Greater Victoria as a sport tourism hub.

With much of the 2025 event calendar already in place, we are focusing on long-term goals to secure significant national and international events for 2026 and beyond. This approach allows us to shift from a reactive stance toward proactive planning and strategic growth.

In addition to our core pillars, we will continue to provide essential resources such as bid book assistance, our Sport Hosting Toolkit and our Economic Impact Calculator. Our Sport VIP program will also be refined to further enhance the experience for visiting athletes and event organizers.

Evaluation/Key Performance Indicators

The success of our sport tourism initiatives will be measured using the following key metrics:

- Room nights attributed to sports sponsorships
- Room nights generated by bids
- Number of events supported through the Sport Tourism Express Program
- Membership revenue growth

Member Services

Destination Greater Victoria is a member-based organization comprising a diverse array of tourism and hospitality businesses. These businesses are the foundation of the organization and drive Greater Victoria's visitor economy. Member businesses also bring significant incremental visitor expenditures into the broader economy, generating jobs, contributions to taxes and further business opportunities. Destination Greater Victoria provides a wide range of services and benefits to strategically support its members and ensure a vibrant and sustainable industry.

STRATEGY

In 2025, Destination Greater Victoria will focus on strengthening its member base and enhancing value for its members by providing essential resources, information, and networking opportunities to foster business growth and explore new opportunities. These efforts will collectively support our member businesses and communities, creating a vibrant and sustainable visitor economy in Greater Victoria.

Key activities and tactics for 2025 include:

- Providing ongoing value, support, benefits, and services for Destination Greater Victoria's members.
- Providing resources, information and networking opportunities that are most valuable to members to help build business and explore new opportunities.
- Continuing to recruit new members to the organization and ensuring a fully representative and diverse membership base.
- Further streamlining membership renewal processes, including online forms and payments.
- Extending Destination Greater Victoria's member value proposition by developing enhanced onboarding materials, tools, and information for new and existing members.
- Further aligning membership processes with the Greater Victoria Sport Tourism Commission (GVSTC) and promoting the GVSTC member value proposition.
- Supporting processes and engagement towards renewal of Destination Greater Victoria's Municipal and Regional District Tax (MRDT) mandate.

Evaluation/Key Performance Indicators

- Gross DGV membership services revenue
- Gross GVSTC membership revenue
- Member satisfaction rating

Research Insights

The ongoing focus of Destination Greater Victoria's research insights and evaluation activities is to develop insights and tools to support DGV's strategic planning and initiatives, while also ensuring effective organizational oversight and performance.

STRATEGY

In 2025 activities will be heavily oriented to developing Destination Greater Victoria's 2027-2031 Strategic Plan, which is foundational to renewal of DGV's Municipal and Regional District Tax (MRDT) mandate for a further five years. The process of applying for MRDT renewal, which is due by June 2026, involves significant stakeholder engagement supported by data, and this will be another core focus throughout 2025.

Destination Greater Victoria's research activities aim to support member businesses and communities, inform tourism business development, and provide members, partners, and other stakeholders with helpful information to support timely and effective decision making.

Key activities and tactics for 2025 include:

Core Research & Data Analytics Insights and Initiatives

- Completing a series of comprehensive research studies generating insights to support and inform strategic planning as well as MRDT renewal, including:
 - Visitor survey to understand visitor characteristics and experiences of Greater Victoria, commencing July 2024 and conducted over 12 months to capture seasonal variances.
 - Resident survey exploring the perspectives of Greater Victoria's communities about the visitor economy and tourism activities.
 - Member survey to support industry input into strategic opportunities and priorities for Greater Victoria's visitor economy.
- Updating the Economic Impacts Assessment for Greater Victoria's visitor economy, highlighting the value and contributions of tourism using 2024 data.
- Tracking and evaluating Destination Greater Victoria's performance on key strategic measures using the Balanced Scorecard framework.
- Implementing dashboards and/or software automation for DGV's Balanced Scorecard.

Renewal of DGV's MRDT Mandate

- Drafting Destination Greater Victoria's next five-year Strategic Plan for 2027 to 2031 with broad stakeholder input.
- Completing processes and materials to renew Destination Greater Victoria's MRDT mandate from 2027. The timeline is to submit materials to the City of Victoria, Capital Regional District (CRD) and Destination BC for approval from January to March 2026, with a June 30, 2026, program deadline for submission of all renewal materials.

Insights for Members

- Analyzing and reporting tourism industry data from multiple sources to help inform Destination Greater Victoria's strategies and business unit activities, and to add value for members.
- Providing industry information and reports as resources for members, partners and other stakeholders, including continuing the enhanced Business on Books forward booking pace program.

Evaluation/Key Performance Indicators

- Community support for tourism
- Greater Victoria Tourism Industry Indicators
 - Accommodation occupancy rate
 - Average daily room rate
 - RevPAR
 - YYJ airport arrivals

Sustainability

Sustainability is core to our community values. As an organization, we chose to put sustainability at the centre of our brand in 2020 because it reflects who we are as a community, and our commitment to taking care of this place that we love for future generations of residents and visitors. Greater Victoria's tourism brand has flourished since that decision. DGV has been actively involved in sustainability efforts since the 1990s, when our organization's first Environment Committee was established.

STRATEGY

Destination Greater Victoria will maintain its leadership in sustainable tourism through core programs like the IMPACT Sustainability Travel and Tourism Conference and our destination-wide Biosphere Certification for the South Island. In 2025, we will expand efforts across key areas, including the implementation of our Circular Economy Strategy, aimed at reducing environmental impacts and fostering new economic opportunities in the visitor economy. With a focus on climate leadership, we will enhance initiatives that support members in taking climate action while reducing our corporate emissions. Our Biosphere Certification program will evolve, placing greater emphasis on capacity building, education, and training, helping members progress toward full certification. The Sustainability Advisory Committee will continue to guide all these efforts.

Key activities and tactics for 2025 include:

- Implement DGV's Circular Economy Strategy, including launching a pilot project in the visitor economy.
 - Continue supporting the Project Zero Circular Economy Accelerator and other initiatives that encourage members to adopt circular practices and business models.
- Evolve the Biosphere Certification Program:
 - Shift focus toward capacity building and member support, with new targets that reflect progress toward certification.
 - Maintain destination-level Biosphere Certification for South Vancouver Island.
- Continue the Destination Stewardship Workshop Series, offering training on social, environmental, and economic sustainability, sharing best practices, and raising awareness among DGV members and staff.
- Demonstrate thought leadership in sustainable tourism, including hosting the IMPACT Sustainability Travel and Tourism Conference.
- Establish membership opportunities for values-aligned partners, sustainable enterprises, circular economy-focused businesses, and Indigenous-owned ventures.
- Participate in the GDS Index and work to improve our score and ranking year-over-year.
- Collaborate with members and partners to develop a Climate Leadership Plan aimed at reducing DGV's corporate carbon footprint and supporting members in carbon reduction and climate adaptation efforts.

Evaluation/Key Performance Indicators

- Members linking to DGV on the Biosphere platform
- Destination Circular Economy strategy
- DGV Environmental Carbon Offset and Reduction Plan

Public Affairs and Destination Stewardship

Destination Greater Victoria plays a pivotal role as a steward of sustainable tourism growth, aligning the visitor economy with community values and priorities. As a cornerstone of the region's economy, DGV focuses on showcasing its significance to policymakers, stakeholders, and residents.

STRATEGY

Central to our efforts in 2025 is the implementation of the 2025-2035 Destination Master Plan. We will maintain and enhance strategic relationships with local governments—especially with core MRDT partners like the City of Victoria and the District of Saanich—as well as provincial and federal authorities. Our active participation in industry groups, conferences, and advocacy efforts will continue to drive the sustainable growth of Greater Victoria's visitor economy.

Key activities and tactics for 2025 include:

- Begin implementing the Destination Master Plan and develop an implementation strategy.
- Monitor issues and policies impacting the visitor economy, addressing opportunities and challenges proactively.
- Advocate effectively with policymakers on behalf of members and the visitor economy, promoting key industry issues.
- Facilitate strategic collaboration among stakeholders, including First Nations, governments, and tourism operators.
- Lead and support sub-regional destination stewardship:
 - Collaborate with partners to study the sustainable tourism potential of the Gorge area.
 - Complete a Saanich Peninsula tourism strategy in collaboration with area stakeholders.
- Complete a Hotel Prospectus to encourage the development of full-service hotels.
- Maintain strong relationships with stakeholders and community leaders to ensure an inclusive approach to destination stewardship.
- Participate in regional and national forums such as PNWER, Future Borders, and the Destinations International Advocacy Committee to shape the future of the visitor economy.
- Provide briefings and insights to government leaders, emphasizing Destination Greater Victoria's role in the community, highlighting partnership opportunities, and underscoring the value of the visitor economy.

Evaluation/Key Performance Indicators

- Political briefings or opportunities
- Destination Master Plan

Reconciliation and Indigenous Tourism

Destination Greater Victoria (DGV) respectfully acknowledges that it operates on the traditional territories of the Lək'wəḡən peoples (Songhees Nation and Xwsepsum Nation), the W̱SÁNEĆ Nations (WJOLÉLP (Tsartlip), BOKÉĆEN (Pauquachin), S̱ÁUTW (Tsawout), W̱SIKEM (Tseycum), MÁLEXEŁ (Malahat)), as well as the Sc'ianew (Beecher Bay), T'Sou-ke, and Pacheedaht Nations.

Over the past years, DGV has begun work to support reconciliation and Indigenous-led tourism development, and this year, this work will be deepened.

STRATEGY

The visitor economy has the potential to be a powerful driver for Indigenous economic development, authentic cultural sharing, and economic reconciliation. With the growing demand for Indigenous-led tourism experiences, Destination Greater Victoria should be ready to effectively and respectfully support Indigenous-led tourism development, as is welcomed and appropriate. Achieving this will require DGV to cultivate deeper partnerships, work collaboratively, and ensure that the organization has the knowledge, capacity, and cultural competency needed to engage effectively and respectfully.

Key activities and tactics for 2025 include:

- Strengthen partnerships with Indigenous Tourism BC (ITBC) to promote Indigenous tourism development and ensure that local First Nations benefit from the visitor economy.
- Collaborate with ITBC to remove barriers to DGV membership for Indigenous-owned businesses and encourage their participation.
- Build strong relationships with First Nations across the region, including the Songhees Nation and Xwsepsum Nation, on whose traditional territory DGV's office is located.
- Continue to sponsor significant Indigenous cultural events, such as the South Island Pow Wow.
- Guided by the Lək'wəḡən Placemaking Working Group, advance Phase Two of the Lək'wəḡən Placemaking Project at the Visitor Centre.
- Support the Indigenous Tourism Association of Canada through sponsorship of the International Indigenous Tourism Conference.
- Provide comprehensive training for DGV staff on Indigenous history, rights, and respectful engagement practices.

Evaluation/Key Performance Indicators

- Indigenous Tourism Plan

Corporate Communications

Through corporate communications activities, Destination Greater Victoria's objective is to build positive support for the visitor economy in Greater Victoria. We take seriously our responsibility as the 'voice' of Greater Victoria's visitor economy and the members we represent. We recognize the importance of effective representation in promoting tourism, maximizing economic benefits, fostering collaboration, and ensuring positive impacts on the community and the region as a whole.

STRATEGY

Corporate communications efforts in 2025 centre on a strategic plan aimed at setting the tone for the visitor economy to operate in line with community values, amplifying corporate messaging that promotes the value of the work we do, and supporting member businesses and communities. This includes making available Destination Greater Victoria representatives to provide commentary in local media, and proactively pitching stories to news outlets. Themes in 2025 will be related to those presented in DGV's 2025-2035 Destination Master Plan.

Key activities and tactics for 2025 include:

- Continue the multi-channel "Every Visitor Counts" efforts to highlight how the visitor economy contributes to the vibrancy of our community.
 - Video Series – Spring and Fall (January to April, September to December)
 - Podcast Series – Spring and Fall (January to April, September to December)
- Support and amplify announcements of various initiatives, campaigns, and promotions on DGV's corporate channels through engaging media relations.
- Maintain the leadership role for corporate communications events such as the annual Business Plan Launch, Tourism Week, and media conferences.
- Identify ways to enhance all corporate documents to be more accessible through the use of AI tools and expert guidance.

Evaluation/Key Performance Indicators

- Local media placements

Community Relations

Participating in community relations and activations is invaluable for Destination Greater Victoria; it strengthens our credibility and contributes to sustainable destination growth. Building strong community ties fosters local support and collaboration. Engaging in community events provides valuable insights into local preferences and trends, enhancing marketing strategies.

STRATEGY

In 2025, community relations will focus on deepening local engagement and fostering robust community ties to strengthen Destination Greater Victoria's credibility and support. A diverse range of community relations activities offer various engagement opportunities in 2025.

Key activities and tactics for 2025 include:

- Drive forward the Victoria Hospitality Awards Program with the intent to build the program's profile in the community and encourage nominations.
- Provide meaningful support to the next generation of hospitality workers by continuing our sponsorship of the Destination Greater Victoria Award through Camosun College's School of Business.
- Support and/or sponsor regular community such as: Greater Victoria Flower Count, Canada Day celebrations, Victoria Pride parade, BCHF Golf Tournament, Victoria Symphony (Splash), Lights of Wonder, etc.
- Work with colleagues across all business units to build support through community relations for DGV's MRDT renewal.

Evaluation/Key Performance Indicators

- Community relations engagements

Visitor Services

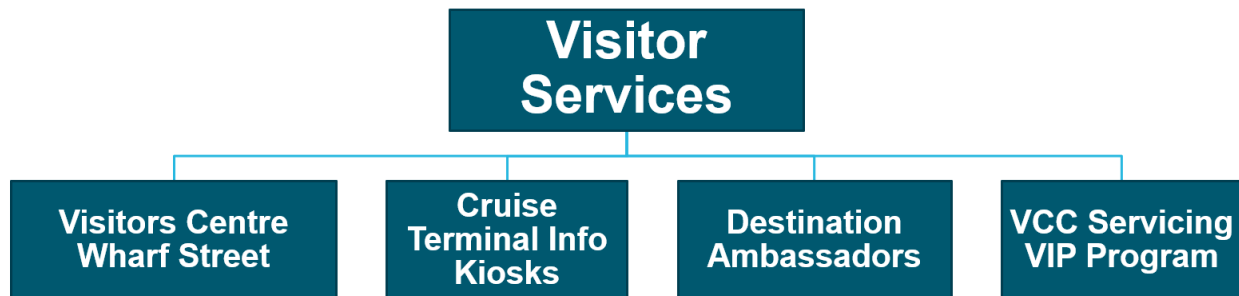
Visitor Services is a core function of a major Destination Marketing Organization as we support our member businesses and communities. The ability to handle customer enquiries, recommend and sell member products, extend lengths-of-stay, handle issues professionally and promote to other Destination BC network locations is central to the Visitor Services mandate.

STRATEGY

In 2025, we will apply destination knowledge, leverage technologies, and deliver outstanding customer service in interactions with visitors desiring information and booking services that help create an unforgettable travel experience. The goal through Visitor Services' visitor interactions is to extend lengths of stay and encourage repeat visitation. In connection with Destination Greater Victoria's five-year strategy, this includes:

- Ticket sales for our members
- Grow rate and volume
- Address seasonality
- Remain highly rated in the membership survey: 2019 satisfaction was 60%

Visitor Services is a core function of a major Destination Marketing Organization. The ability to handle customer enquiries, recommend and sell member products, extend lengths-of-stay, handle issues professionally and promote to other Destination B.C. network locations is central to the Visitor Services mandate.



Key activities and tactics for 2025 include:

- Professional and continuous sales training for all front-line staff to ensure the product is understood, sales targets and customer service initiatives are adhered to, and a strong growth mentality is fostered.
- Collaboration with members and potential partners.
- Leverage technologies to enhance digital offerings to visitors. Specifically enhancing E-Commerce opportunities on DGVs platforms.
- Collaborate with Songhees Nation and Esquimalt Nation to maintain a placemaking experience within the Centre.
- Increase the relevance of the Visitor Centre to augment foot traffic.
- Enhancement of the volunteer program and elevating their presence to see a growth in volunteer numbers, hours and impact.

Partnerships

Visitor Services partners with the City of Victoria, District of Saanich, Songhees Nation, Esquimalt Nation, Greater Victoria Harbour Authority, Destination British Columbia, Destination Canada, Downtown Victoria Business Association, Attractions Victoria, Les Clefs d'Or Canada and the Victoria Guest Services Network.

Evaluation/Key Performance Indicators

- Visitor Centre ticket sales
- Digital platform e-commerce revenue

Governance

Effective governance is essential for Destination Greater Victoria to ensure that the organization operates in line with its mission and objectives. Good governance involves a set of practices that guarantee transparency, accountability, and strategic oversight, which are crucial for maintaining the trust of members, partners, and stakeholders. The governance framework at DGV is designed to align with the organization's Constitution and Bylaws, supporting the Board of Directors and advisory committees in their role to oversee organizational performance and provide strategic input.

In 2025, DGV will focus on enhancing its governance practices by providing access to governance resources and tools. This includes leveraging the expertise of the Institute of Corporate Directors (ICD) to ensure that governance activities adhere to best practices. Efficient Board and Committee operations will be supported through comprehensive meeting packages, facilitated meetings, and the maintenance of governance records. Moreover, the use of a dedicated Board and Committee Portal will streamline access to essential documents and resources, thereby enabling more effective decision-making processes.

Furthermore, DGV will coordinate Board and Committee nominations to ensure that the right mix of skills and perspectives are represented. This approach not only strengthens the governance structure, but also enhances the organization's ability to respond to challenges and opportunities. By focusing on these key activities, DGV aims to uphold the highest standards of governance, fostering a culture of excellence and accountability within the organization and ensuring its long-term success.

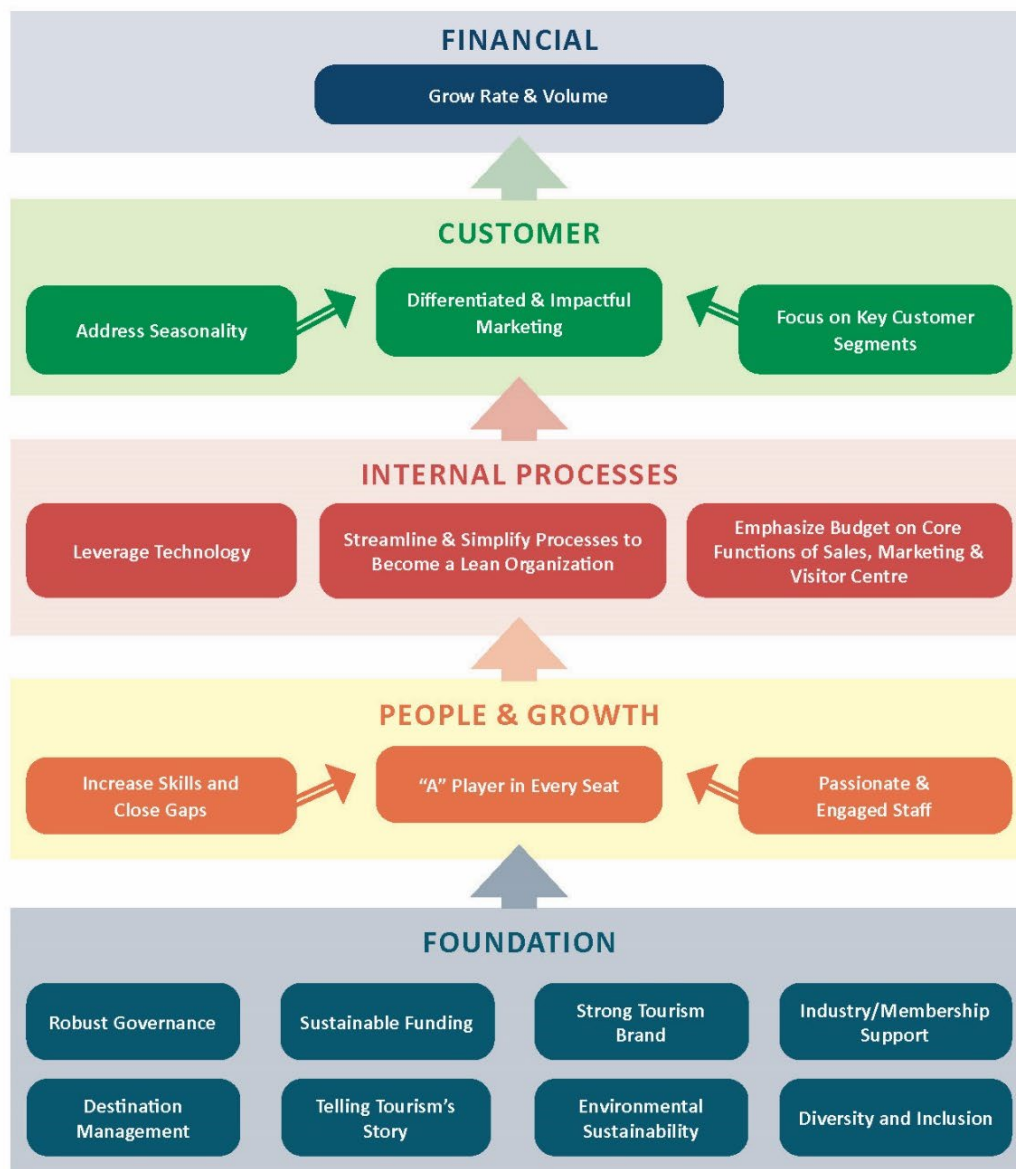
Greater Victoria Visitors and Convention Bureau 2025 Draft Budget Overview

Ordinary Income/Expense	BUDGET	FORECAST	BUDGET	Reference
	2024	2024	2025	
Income				
Total Commission Revenue	150,000	117,189	150,000	R1
Total Destination Marketing Fee (DMF)	2,275,800	2,160,548	2,535,000	R2
Total Grant Revenue	115,000	352,173	150,000	R3
Total Hotel Tax Revenue	7,557,405	8,431,487	8,778,650	R4
Total Membership Services	511,500	504,717	611,400	R5
Total Major Events Revenue	0	0	700,000	
Total Miscellaneous Revenue	63,675	227,080	150,000	R6
Total Retail Sales	12,830	13,643	12,754	R7
Total Sports Tourism	60,000	53,692	70,000	R8
Total Income	10,746,210	11,860,529	13,157,805	
Total COGS	11,163	12,457	11,120	
Gross Profit	10,735,047	11,848,072	13,146,685	
Expense				
Marketing Expenses				
Total Advertising	1,984,700	2,632,668	2,199,000	S1
Total Business Events Victoria	1,266,020	1,313,703	1,785,550	S2
Total General Marketing	31,000	30,293	31,000	S3
Total Major Events & Conferences	90,000	214,808	620,000	S4
Total Publications	25,075	27,200	32,000	S5
Total Research	191,900	325,752	231,000	S6
Total Corp Comms & Community Relations	273,800	186,452	261,200	S7
Total Public Affairs, Dest Stewardship & Sustainability	263,600	214,100	391,100	S7
Total Sports Tourism Commission	242,000	575,612	332,500	S8
Total Travel Media	288,400	341,484	350,750	S9
Total Travel Trade	377,000	317,183	384,500	S10
Total Access Development	400,000	263,749	788,500	S10
Total Website	165,100	250,592	179,100	S11
Total Marketing Expenses	5,598,595	6,693,596	7,586,200	
Operating Expenses				
Amortization	85,000	88,522	94,000	O1
Total Communications	92,603	99,986	94,000	O2
Total Facilities Rent & Taxes	300,218	300,184	305,090	O3
Total General Travel & Conferences	142,200	113,683	142,300	O4
Total Grants & Sponsorships	100,000	25,730	25,000	O5
Total Interest & Bank Charges	58,500	76,639	76,632	O6
Total Membership Events	134,400	85,807	152,000	O7
Total Operating Supplies	310,414	370,478	404,062	O8
Total Professional Services	268,589	304,318	291,704	O9
Total Utilities & Premises	122,800	42,579	22,800	O10
Total Operating Expenses	1,614,724	1,507,926	1,607,588	
Total Wages & Benefits	3,521,728	3,518,765	3,952,897	W1
Total Expense	10,735,047	11,720,287	13,146,685	
Net Income	0	127,785	0	

STRATEGY FOCUSED ORGANIZATION

Destination Greater Victoria's Strategy Map

A Strategy Map and Enterprise Balanced Score Card are pivotal tools derived from Kaplan and Norton's "Strategy Focused Organization" approach, designed to help manage and align organizational activities with strategic objectives. The Strategy Map visually outlines an organization's goals and the cause-and-effect relationships between them, while the Enterprise Balanced Score Card tracks performance across multiple key areas, ensuring a balanced perspective on success. Destination Greater Victoria has successfully employed this framework for over a decade, demonstrating its effectiveness in driving strategic focus and achieving organizational goals.



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2025 Enterprise Balanced Scorecard

6 December 2024

Unit	2019 Result	2020 Result	2021 Result	2022 Result	2023 Result	2024 Target	2025 Target
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Greater Victoria Tourism Industry Indicators ¹

Accommodation Occupancy Rate	%	73.52	36.39	49.90	68.85	68.30	70.00	72.7 ²
Average Daily Room Rate	\$	189.10	149.10	186.70	236.31	247.35	255.00	263.00 ²
RevPAR	\$	139.03	54.25	93.17	162.71	169.05	170.00	191.00 ²
Conference Centre Delegate Days	#	118,661	15,756	20,018	87,256	83,556	87,000	105,000
YYJ Airport Arrivals	#	1,924,385	574,837	673,748	1,490,039	1,740,107	1,800,000 ³	1,883,200 ³

1. Financial Perspective

Marketing Campaign ROI	ratio	53:1	N/A ⁴	22:1 ⁵	22:1 ⁵	58:1	40:1	42:1
Business Events Confirmed Room Nights	#	37,951	7,305	12,114	26,203	43,905	35,000	47,000
Victoria Conference Centre Revenue	\$	1,350,171	243,945	403,326	1,071,540	1,307,264	1,095,000 ⁶	1,200,000 ⁶
Visitor Centre Ticket Sales	\$	1,753,500	78,000	153,300	720,000	1,118,424	1,200,000	1,260,000
Gross DGV Membership Services Revenue	\$	1,114,451	480,000	387,014	454,500	481,658	595,000	610,000
Gross GVSTC Membership Revenue	\$	82,250	0	0	56,500	61,775	60,000	70,000
Room Nights Attributable to Sport Tourism – Sponsored	#	16,486	2,500	5,117	15,017	16,251	16,000	16,000
Room Nights Attributable to Sport Tourism – Bids	#	---	---	---	13,564	12,523	18,000	19,000
Proportion of Gross Revenue Allocated to Labour	%	33.4	39.0	26.8	28.3	30.3	33.0	30.0

2. Customer Perspective

Sessions on TourismVictoria.com Total Digital Platform	#	2,623,025	926,564	1,291,421	2,109,298	2,320,206	2,400,000 ⁷	2,000,000 ⁷
Travel Media & Influencer Placements	#	439	80	261	535	645	500	500
Website Partner Referrals	#	---	---	---	---	---	---	275,000
Consortia, Travel Trade, Marketing Partnerships Room Nights	#	---	---	---	---	---	2,000	4,300
Air Route Development Partnerships ⁸	#	---	---	---	---	---	3	3
Sport Tourism Express Program Events Supported	#	---	---	---	---	---	25	25

2025 Enterprise Balanced Scorecard

6 December 2024

Unit	2019 Result	2020 Result	2021 Result	2022 Result	2023 Result	2024 Target	2025 Target
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3. Internal Processes Perspective

AI Policies and Procedures	---	---	---	---	---	---	Implemented	
Destination Master Plan	---	---	---	---	Underway	Ongoing	Actioning	Implementing five initiatives
Indigenous Tourism Plan	---	---	---	---	Part Scoped	Part Scoped	Developed	Actioning
Gorge Area Study	---	---	---	---	---	---	---	Completed
Saanich Peninsula Strategy	---	---	---	---	---	---	---	Completed
Research Insights: Visitor Survey and Resident Survey	---	Completed	---	---	---	---	Underway	Completed
Five-Year 2027 to 2031 Strategic Plan	---	---	---	---	---	---	---	Developed and seeking approval

4. Learning and Growth Perspective

Employee Engagement Composite Measure	%	71.4	N/A ⁴	N/A ⁴	N/A ⁴	76.2	72.0	72.0
Median Years of Employee Tenure	#	2.4	N/A ⁴	N/A ⁴	2.1	2.3	2.5	2.7

Foundational, Stewardship and Governance

Member Satisfaction Rate (Satisfied or Neutral)	%	93	N/A ⁴	N/A ⁴	91	92	90	90
Board and Committee Meetings Participation	%	70	77	79	80	80	80	80
Local Media Placements	#	119	121	138	152	228	200	215
Political Briefings or Opportunities	#	49	37	53	51	77	70	80
Community Support for Tourism	---	Monitor	Assess	98% Positive	Deferred ⁹	88% Positive	98% Positive	98% Positive
Community Relations Engagements ¹⁰	#	---	---	---	---	---	20	30 ¹¹
Destinations International EDI Assessment Tool Mean Score	%	---	---	---	---	---	65	65
Members Linking to DGV on the Biosphere Platform	#	---	---	---	---	53	75	75
Biosphere Certification Member Support Program	---	---	---	---	---	---	---	Underway
Global Destination Sustainability (GDS) Index Score Increase	#	---	---	---	---	---	---	2.0
Destination Circular Economy Strategy	---	---	---	---	---	---	Developed	Actioning
DGV Environmental Carbon Offset and Reduction Plan	---	---	Measure	Carbon Neutral	Carbon Positive	Carbon Positive	Maintain offsets and reduce carbon footprint	Maintain offsets and reduce carbon footprint

Footnotes

¹ Sources: STR / CoStar Victoria Destination Reports and Chemistry Consulting Group, Victoria Tourism Bulletins.

² Target is CoStar forecast January 2025 to December 2025.

³ Victoria Airport Authority forecast.

⁴ Not assessed or not applicable due to impacts of the COVID pandemic.

⁵ Results are relatively lower because ROI was assessed for the Vancouver market rather than Seattle and spending by Canadians is lower.

⁶ Target aligns with the City of Victoria's budget for Victoria Conference Centre.

⁷ Target reflects shifts in data analytics, including narrower session definition through Google Analytics 4 from mid-2023.

⁸ Defined as increased service frequency and/or gauge, or a new city pair.

⁹ Assessment deferred in 2022 to be a component of the Destination Master Plan process in 2023.

¹⁰ Community events sponsored, promoted, or attended, community partnerships and collaborations, and community outreach or speaking engagements.

¹¹ Target for 2025 includes monthly Victoria Hospitality Awards Program presentations, which were not included previously.

NOTES

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