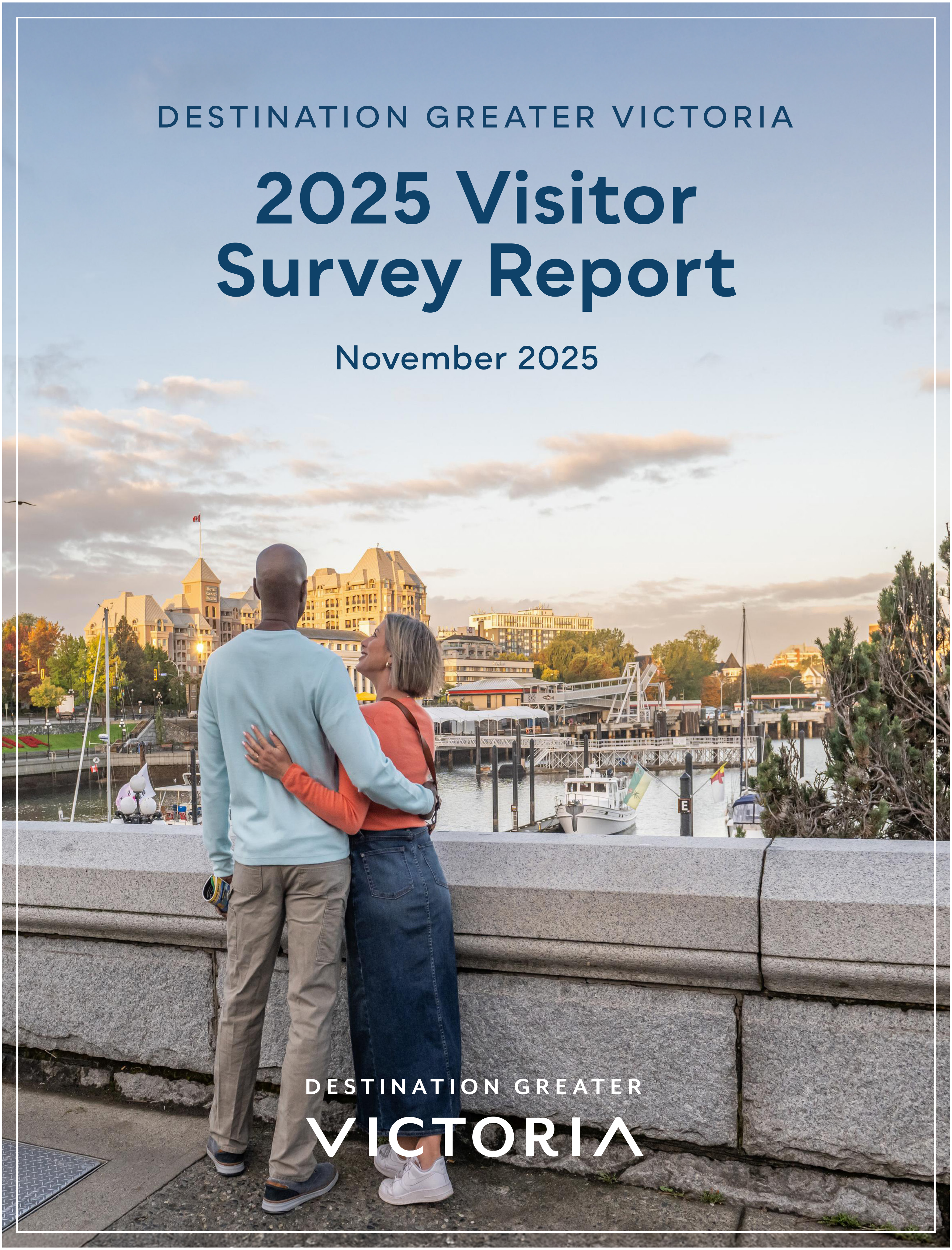
DESTINATION GREATER VICTORIA

2025 Visitor Survey Report

November 2025



DESTINATION GREATER VICTORIA

Acknowledgement

Destination Greater Victoria recognizes, with respect, that its office is located on the Territory of the Ləkʷəŋən People, now known as the Songhees Nation and ’ Xwsepsum Nation. Destination Greater Victoria, as the official destination marketing organization for Greater Victoria, also respectfully recognizes that it operates on the Territory of the W̱SÁNEĆ Nations (W̱JOȽEȽP (Tsartlip), BOḰEĆEN (Pauquachin), SȾÁUTW̱,(Tsawout) W̱SIKEM (Tseycum) and MÁLEXEȽ (Malahat)), and the Sc'ianew (Beecher Bay), T’Sou-ke, and Pacheedaht Nations.

Message from Destination Greater Victoria's CEO

On behalf of Destination Greater Victoria, I would like to extend sincere thanks to everyone involved in producing this new Visitor Survey Report. This report reflects our collective commitment to understanding our visitors in a meaningful and future-focused way, and I am confident the resulting insights will serve our members, customer groups, and wider industry partners for many years ahead.

The visitor survey represents one of the most substantive pieces of research we undertake as a destination; appropriately, it is completed roughly once every five years. This report builds directly on the 2019 Visitor Survey, allowing us to establish true longitudinal comparison. With this new 2025 study, we now have an important evidence base to understand how our visitor mix, motivations, and economic contribution have evolved over time.

We were intentional in the timing of this work. Waiting until the market had stabilized after the post-pandemic recovery was the right and prudent decision. By investing in this study now, we can be confident that the insights reflect a mature and steady state of the visitor economy in Greater Victoria.

The research reinforces our current strategy and validates our positioning in the global tourism landscape. Greater Victoria continues to perform as a short-haul getaway destination for core North American markets, supported by some international visitation, which provides diversification. Underpinning this is stable and year-round demand driven by meetings and conferences and the growth of sports tourism. Overall, Greater Victoria enjoys a healthy and balanced mix of source markets, and we are particularly pleased to see a very strong Net Promoter Score, reflecting the exceptional visitor experience our industry delivers.

I invite you to explore this report in full. The findings are relevant and thoughtfully presented, and I am confident you will find them both interesting and informative. Whether you are a member, stakeholder, or partner in our visitor economy, I hope the insights support your work and spark new ideas as we continue to strengthen Greater Victoria's tourism sector together.

Sincerely,

Paul Nursey

Paul Nursey

CEO – Destination Greater Victoria

Executive Summary

To better understand the characteristics and dynamics of overnight visitation to Greater Victoria, Destination Greater Victoria completed a full-year program of visitor-focused research between June 2024 and May 2025. The study repeated and expanded on work first undertaken in 2019, providing a comprehensive view of who visits Greater Victoria, the nature of their trip, and how patterns vary by season. Results confirm that Greater Victoria continues to perform strongly as a leisure destination, maintaining very high satisfaction and advocacy while showing meaningful shifts in visitor mix, seasonal patterns, and spending behaviour since 2019.

Data were collected through in-destination intercept interviews with overnight visitors, complemented by online post-visit surveys. Together, these instruments provided information about a wide range of trip parameters, including visitor origin, trip purpose, travel party composition, accommodation, spending, and satisfaction. Sample sizes were 4,044 visitors for the intercept interviews and 1,103 for the online surveys. Data were weighted to align with benchmark seasonal visitor volumes to ensure year-round representativeness and direct comparability with 2019.

Results for the full year showed there were more female than male respondents to the survey (60 per cent and 38 per cent respectively), consistent with 2019 patterns. These proportions reflect the survey sample and should not be interpreted as precise estimates of the gender mix of all overnight visitors. As in 2019, the majority of visitors were aged over 44 years, most commonly between 55 and 74, and 59 per cent had visited previously within the past five years, confirming a strong repeat market broadly consistent with pre-pandemic levels.

Just over half of all visitors were from within Canada, nearly three in ten were from the United States, and one in five were from international markets. These findings confirm that Greater Victoria continues to be primarily a short-haul destination supported by strong domestic and regional markets. The median travel party size remained two, most often comprising spouses, partners, or immediate family, in line with 2019 results.

Leisure and vacation travel remained the main purpose of visit, accounting for three-quarters of overnight stays, while visiting friends and relatives accounted for approximately one in five. Business and conference travel represented a smaller share overall and has not yet fully returned to 2019 levels. The median stay length was three nights across all seasons, again similar to 2019, although summer trips were slightly longer, particularly among international and higher-income visitors. Compared with 2019, visitation has become more evenly distributed across the year, with stronger winter and shoulder-season representation, which supports Greater Victoria's long-term objective of balanced, year-round visitation. Most visitors stayed in hotels or motels, with smaller shares in short-term vacation rentals or with friends and relatives compared to 2019. This shift is consistent with recent regulatory changes affecting short-term rental supply as well as evolving visitor preferences. Visits were typically planned one to two months in advance, most accommodation was booked online by visitors themselves, and travel to the region occurred mainly by BC Ferries from Tsawwassen or by air through Victoria International Airport.

Each overnight visitor spent an average of approximately C$1,185 over the course of their visit within Greater Victoria, primarily on accommodation, food and beverage, and shopping. This equates to about C$2,369 per travel party and represents a substantial increase from the 2019 mean of C$1,654 per party, indicating both higher prices and greater engagement in paid experiences. As in 2019, spending per person remained highest among U.S. and international visitors and among business travellers. Seasonal variation in spend was also evident, with the highest per-person expenditure occurring in summer and the lowest in fall. Together, these results indicate a materially stronger per-visitor economic contribution than observed prior to the pandemic.

Beyond core trip metrics, the 2025 study introduced new questions about the influence of Indigenous heritage and sustainability considerations on destination choice. Approximately 28 per cent of visitors reported that Greater Victoria's Indigenous heritage and First Nations connections had some or large influence on their decision to visit, while 21 per cent said the same of sustainability credentials. These results establish a baseline for future tracking and indicate meaningful awareness, although direct influence on destination choice remains moderate. Sustainability considerations were most likely to shape choices of attractions, activities and, to a lesser extent, food, rather than accommodation or shopping.

Nearly half of respondents used one or more of Destination Greater Victoria information services before or during their trip, most often the Visitor Centre and the DGV website. Use of the Visitor Centre increased compared with 2019, reinforcing the continued importance of in-person visitor services and confirming that DGV and its partners can influence both trip planning and in-destination decisions for a significant share of visitors.

Overall visitor satisfaction remained very high, with an average rating of 4.7 out of 5, strongest for atmosphere, hospitality, and outdoor recreation—attributes that remain consistent strengths of the destination. Net Promoter Score was 78, essentially unchanged from 2019 and well above typical destination benchmarks. More than 90 per cent of respondents were likely to recommend Greater Victoria. As in 2019, repeat visitors were stronger advocates than first-time visitors, pointing to opportunities to enhance first-time visitor orientation, perceived value, and ease of getting around. Perceived visitor volume rarely detracted from the experience; only a small minority reported negative impacts from crowding during peak periods. However, concerns related to affordability, parking, traffic congestion, and downtown cleanliness emerged more prominently in visitor suggestions for enhancement compared with 2019.

While this report presents high-level results from the research, a key outcome was the continued development of a comprehensive and repeatable dataset on overnight visitation to Greater Victoria. The combined 2019 and 2025 datasets provide a robust foundation for examining a diverse range of questions, benchmarking key measures, and monitoring trends across visitor origin, behaviour, spending, and satisfaction. Looking ahead, future waves of research could benefit from more targeted exploration of specific segments such as business travel and organized tour participation, enabling deeper insight into the dynamics, barriers, and economic potential of these segments.

Going forward, this long-term research will continue to inform Destination Greater Victoria's management, Board of Directors, and members in their planning, marketing, and decision-making as the destination continues to evolve.

Contents

1 Background and Objectives

Greater Victoria continues to attract a diverse mix of domestic and international visitors, supported by its reputation for natural beauty, cultural vibrancy, and year-round appeal. Since the last comprehensive visitor study in 2019, the tourism environment has shifted significantly. The COVID-19 pandemic reshaped travel motivations, accessibility, and visitor expectations, accelerating trends toward regional travel, flexible itineraries, and meaningful experiences rooted in sustainability and local connection.

In this context, Destination Greater Victoria (DGV) undertook a follow-up study to provide an updated, evidence-based understanding of the visitors who choose the region today. The 2025 Visitor Survey builds directly on the 2019 benchmark research, maintaining methodological continuity while reflecting current realities in the post-pandemic travel landscape.

The primary objective of the 2025 Visitor Survey was to provide a current and seasonally representative picture of overnight visitors to Greater Victoria. Specifically, the study sought to:

- Identify who is visiting Greater Victoria today and how this profile compares with pre-pandemic visitation patterns.
- Understand trip characteristics, including purpose of visit, party composition, duration, accommodation choices, and modes of arrival.
- Measure visitor spending and how expenditure levels and distribution have changed since 2019.
- Assess visitor satisfaction, motivations, and perceptions of Greater Victoria, including emerging factors such as sustainability, Indigenous culture, and value for money.
- Provide actionable insights to inform Destination Greater Victoria's strategic planning, marketing initiatives, and stakeholder engagement.

The 2025 study represents the second wave of what is now a longitudinal research program. The inaugural 2019 survey established a robust methodological foundation, expanding the organization's understanding of visitor dynamics by collecting data across all four seasons for the first time. The 2025 study follows this same structure and approach, collecting data through intercept surveys and post-visit follow-ups, while incorporating updated weighting and fieldwork coverage. This continuity ensures that results can be directly compared to 2019 benchmarks, enabling Destination Greater Victoria to monitor trends in visitor origin, behaviour, spending, and satisfaction over time.

Together, the two studies create a comprehensive dataset that reflects both stability and transformation within Greater Victoria's visitor economy, capturing the city's evolution from a traditionally seasonal destination to a more balanced, year-round, and experience-driven tourism market.

2 Methods

The 2025 Visitor Survey followed the same research design, sampling strategy, data collection procedures, and analytical methods used in the 2019 study to ensure strong comparability between years. The study maintained the established two-phase approach, which includes year-round on-site intercept interviews with overnight visitors and a subsequent online follow-up survey completed after their trip. This continuity provides a reliable foundation for tracking changes in visitor characteristics, behaviours, and economic impact over time. Full methodological details are provided in Appendix 1.

3 Visitor Characteristics

Survey data captured a broad range of visitor characteristics, including previous visitation to Greater Victoria, market origin, travel party size and composition, participation in organized groups or tours, and annual household income before tax. Together, these measures provide a comprehensive profile of who visits Greater Victoria, both by season and across the full year.

3.1 Previous Visitation

Overall, 59 per cent of respondents had previously visited Greater Victoria, and most of these had stayed overnight at least once within the past five years (median: three visits). Previous visitation was highest among respondents surveyed in winter and lowest among those surveyed in summer (Figure 1). Fall visitors reported slightly more overnight stays within the past five years (median: four) than those surveyed in winter and summer (median: three) and more than those surveyed in spring (median: two).

In 2019, previous visitation was measured over a two-year period rather than five, so results are not directly comparable. However, when assessed over the broader five-year span, the 2025 data indicate a higher median number of repeat visits, suggesting that regular return travel to Greater Victoria remains a strong and ongoing trend.

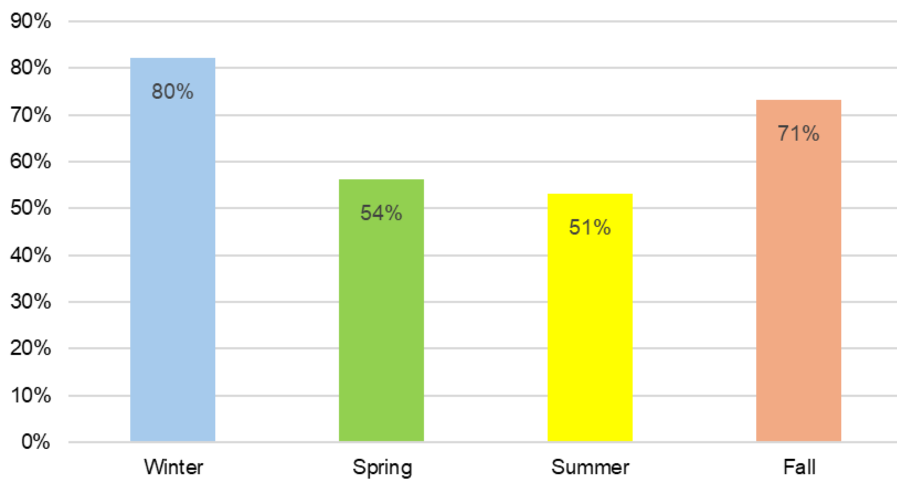


Figure 1 Proportion of respondents each season who were repeat visitors to Greater Victoria (n = 3,916 weighted).

Among repeat visitors to Greater Victoria, nearly 4 per cent first experienced the destination as part of a cruise ship itinerary. More than half of these respondents (56 per cent) indicated that their cruise visit had a strong influence on their decision to return for one or more overnight stays. This finding aligns closely with 2019 results and continues to highlight the role of cruise travel as an effective introduction to the region that supports future land-based visitation.

3.2 Visitor Origin

Across seasons, 51 per cent of respondents were from within Canada, 29 per cent were from the USA and 20 per cent were from international locations. These proportions differed considerably between seasons (Table 1), with visitors from Canada predominant over winter, spring and fall, and visitors from the USA predominant in summer. International travellers favoured visiting during summer and were least likely to visit in winter. This seasonal origin mix is consistent with regional tourism patterns reported for Vancouver Island and British Columbia, where domestic visitors account for the largest share of annual travel and U.S. and international markets peak in summer.[1]

Table 1 Origin of respondents visiting Greater Victoria (n = 4,044 weighted).

Origin	**Winter** *(n = 486)*	**Spring** *(n = 1,162)*	**Summer** *(n = 1,684)*	**Fall** *(n = 712)*	**All Seasons 2025** *(n = 4,044)*	**All Seasons 2019 (n = 4,002)**
Canada	79%	52%	40%	58%	51%	50%
USA	16%	28%	40%	31%	29%	31%
International	12%	16%	24%	20%	20%	19%

Overall, 87 per cent of respondents visiting from within Canada were from British Columbia (51%), Alberta (21%) or Ontario (15%), with relatively few from other provinces or territories (Figure 2).

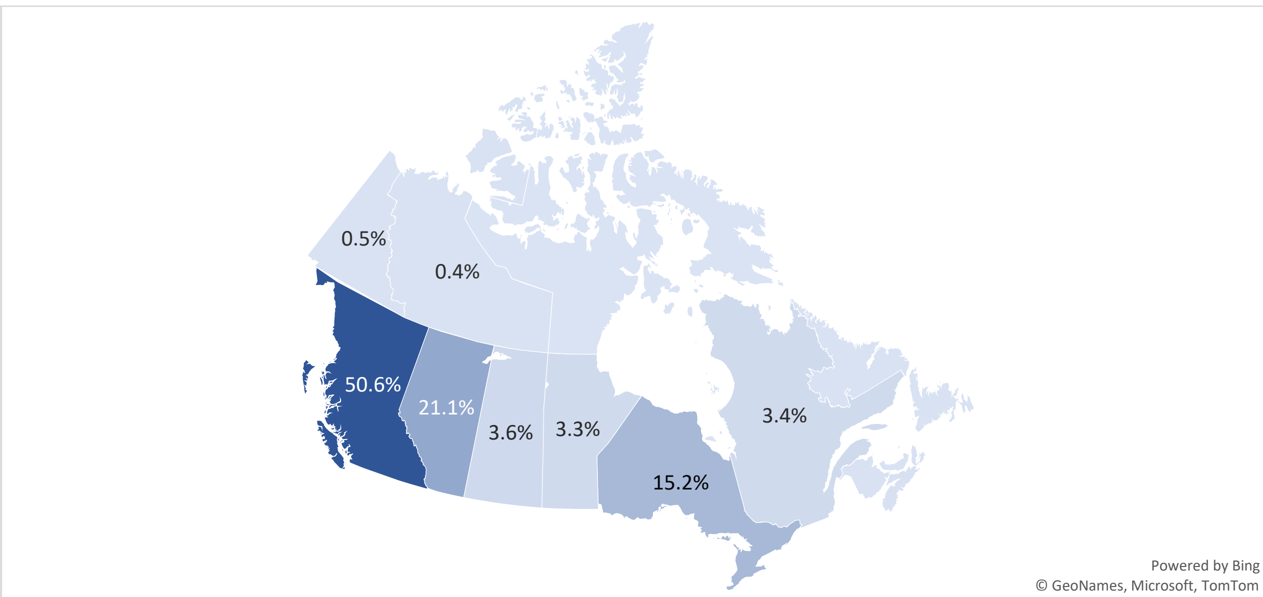


Figure 2 Proportion of respondents from each province or territory in Canada (n = 2,065 weighted).

Almost two-thirds of respondents who visited from the USA were from Washington (42%), California (13%) or Oregon (10%), with comparatively few from other states (Figure 3). 4.4 per cent of American respondents were from Texas, an increase from 2019 when 2.7 per cent were from Texas.

[1] Regional context sources include:

- **Vancouver Island 2023 Year-in-Review: Canada, USA, International** (4VI / ForVi, 2024).
- **Vancouver Island Regional Tourism Profile** (Destination BC).

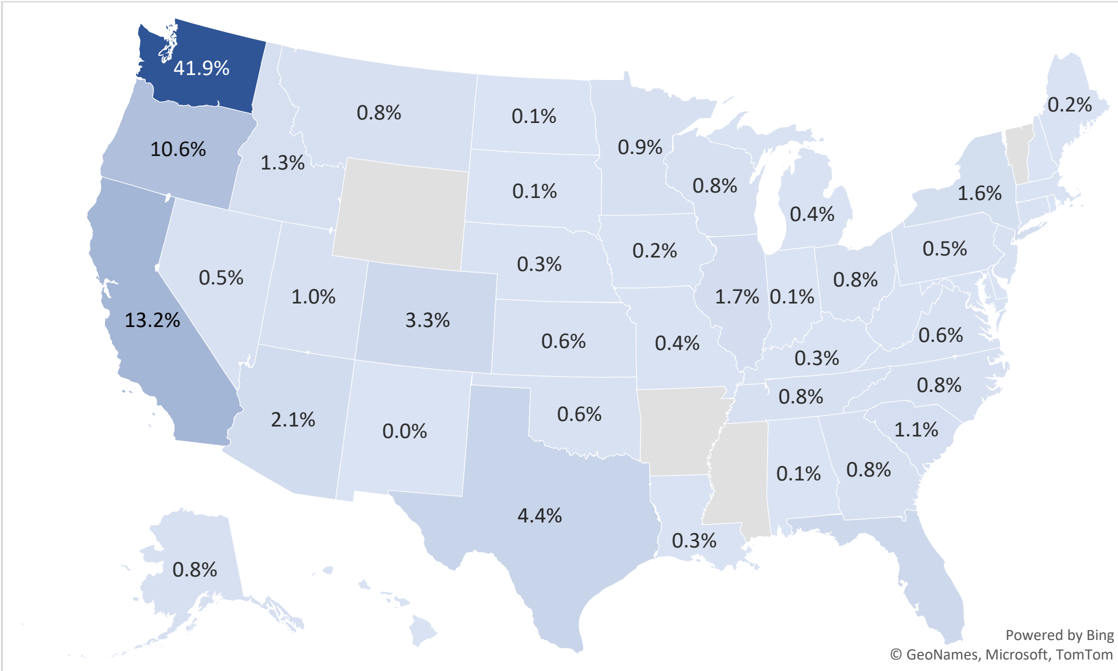


Figure 3 Proportion of respondents from each state in the USA (n = 1,149 weighted).

A total of 59 international countries were represented among 2025 respondents. Excluding the United States, 62 per cent of international visitors originated from five key markets: the United Kingdom, Australia, Germany, the Netherlands, and Mexico (Table 2). Compared with 2019, notable shifts occurred within this group. The United Kingdom declined from 24 per cent of visitors in 2019 to 19 per cent in 2025, while Australia increased substantially from 13 to 19 per cent over the same period. Mexico also showed growth, rising from 4 per cent in 2019 to 7 per cent in 2025. Germany (12% to 11%) and the Netherlands (7% to 6%) both experienced small, relatively stable declines.

Seasonal travel patterns varied by country. Visitors from Australia, Brazil, China, France, Japan, and New Zealand were observed in relatively consistent proportions year-round, suggesting a steady presence not tied to peak tourism months. In contrast, visitors from European countries, India, Singapore, and the Philippines showed stronger seasonal concentration. Europeans were most likely to visit in summer, while travellers from India tended to arrive in winter and fall, and those from Singapore or the Philippines were more commonly encountered in spring and fall.

It is worth noting that language and travel mode may partially explain lower intercept representation from China, Japan, and South Korea. Many travellers from these markets visit Greater Victoria as part of day-trip itineraries, particularly through tour groups originating in Vancouver, and were therefore excluded from the overnight visitor sample.

Table 2 Proportion of respondents from the five most frequent international origins excluding the USA (n = 809 weighted).

Origin	Winter *(n = 43)*	Spring *(n = 251)*	Summer *(n = 441)*	Fall *(n = 74)*	All Seasons 2025 *(n = 809)*	All Seasons 2019 *(n = 771)*
United Kingdom	12%	24%	16%	26%	19%	24%
Australia	16%	29%	14%	14%	19%	13%
Germany	11%	5%	14%	14%	11%	12%
Netherlands	2%	5%	9%	1%	6%	7%
Mexico	11%	2%	9%	7%	7%	4%

The ten market origins reported most frequently by respondents are ranked in Table 3. Compared with 2019, Greater Vancouver showed the most pronounced change, increasing from 13 per cent of visitors in 2019 to 18 per cent in 2025, reinforcing its role as the dominant origin market. The proportions of visitors from Washington (13%), Alberta (10%), Ontario (8%), and Other British Columbia (7%) remained stable across both survey years. Vancouver Island (5%), California (5%), the United Kingdom (5%), Oregon (3%), and Australia (3%) also remained unchanged year over year.

Table 3 Proportion of respondents from the ten most frequent market origins (n = 4,002 weighted).

Market Origin	Winter *(n = 486)*	Spring *(n = 1,162)*	Summer *(n = 1,684)*	Fall *(n = 712)*	All Seasons 2025 *(n = 4,044)*	All Seasons 2019 *(n = 4,002)*
Greater Vancouver	21%	16%	8%	11%	18%	13%
Washington	9%	16%	11%	14%	13%	13%
Alberta	10%	12%	8%	10%	10%	10%
Ontario	11%	7%	7%	8%	8%	8%
Other British Columbia	7%	7%	6%	9%	7%	7%
Vancouver Island	10%	5%	2%	7%	5%	5%
California	2%	3%	7%	4%	5%	5%
United Kingdom	1%	5%	7%	4%	5%	5%
Oregon	1%	2%	4%	3%	3%	3%
Australia	2%	2%	3%	3%	3%	3%

3.3 Travel Party Size and Composition

The median travel party size remained two (n = 3,920), a consistent pattern across all seasons. Just over half of respondents (53%) travelled as a party of two, while more than nine in ten were part of groups of four or fewer (Figure 4). Larger travel parties appeared most frequently in summer, reflecting peak family and group travel periods, while smaller parties were more typical in fall and winter.

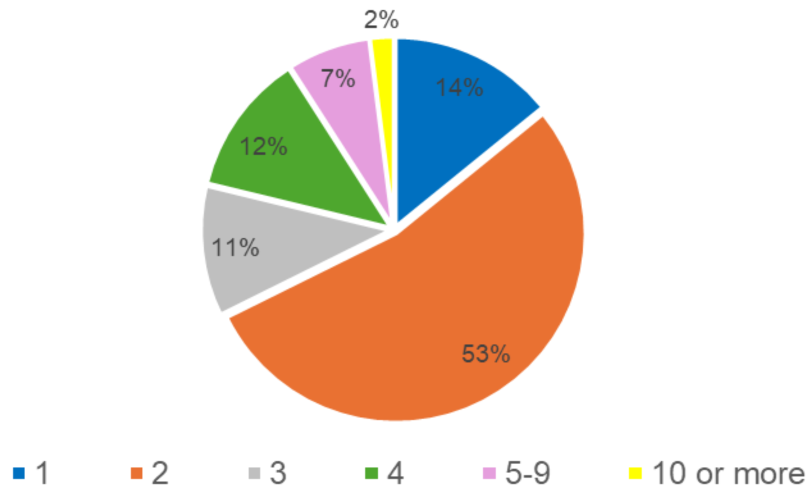


Figure 4 Relative proportions of party sizes (n = 3,920 weighted).

Compared to the total sample, solo travellers were:

- more likely to be visiting friends or relatives or travelling for business or a conference,
- least likely to have travelled from the U.S., and
- more likely to have arrived by air or as walk-on ferry passengers.

The majority of visitors (84%) in 2025 travelled with family or friends, a pattern that remained stable across all seasons (Figure 5). Within this group, travel with family members was notably more common than with friends, a trend consistent across age groups and genders. This continued dominance of family-based travel underscores the enduring role of shared leisure experiences as a core driver of visitation to Greater Victoria.

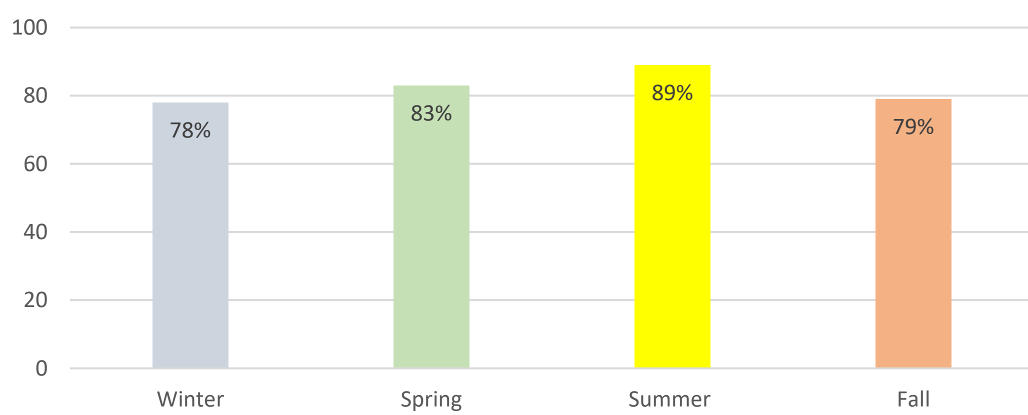


Figure 5 Proportion of respondents each season who were travelling with family or friends (n = 3,954 weighted).

Analysis of 2025 visitor data shows that travel parties most often comprised family members, particularly spouses, partners, and immediate relatives (Table 4). Across all seasons, half of respondents (50%) were travelling with a spouse or partner, while one-quarter (25%) were accompanied by immediate family. Smaller shares travelled with extended family (10%) or friends (11%), and only about 1 per cent reported travelling with work colleagues or other companions.

Seasonal differences followed predictable patterns. Larger family groups were most common in summer, reflecting school holidays and family-oriented vacation timing. Conversely, couple travel peaked in fall (62%) and winter (61%), when shorter getaways and off-peak packages tend to appeal to this segment.

Together, these results highlight that couples and immediate families continue to anchor Greater Victoria's visitor base throughout the year, with couples representing a key opportunity for off-season marketing focused on relaxation, culture, and romantic escapes.

Table 4 Proportion of respondents in each type of travel party, excluding solo travellers (n = 3,580 weighted).

Travel Party Composition	**Winter** *(n = 387)*	**Spring** *(n = 984)*	**Summer** *(n = 1,650)*	**Fall** *(n = 560)*	**All Seasons** *(n = 3,580)*	**All Seasons** *(n = 969)*
Spouse or Partner	61%	53%	41%	62%	50%	54%
Immediate Family	23%	22%	30%	21%	25%	24%
Extended Family	2%	10%	16%	4%	10%	6%
Friends	10%	13%	11%	12%	11%	10%
Work Colleagues	3%	2%	0%	1%	1%	3%
Other	0%	1%	0%	1%	0%	3%

3.4 Organized Groups or Tours

Participation in organized group or tour travel remained limited in 2025. Overall, 6 per cent of respondents (n = 3,985) reported travelling as part of a group or tour, with representation varying seasonally from 3 per cent in winter to 8 per cent in spring. These travellers were disproportionately international visitors, reflecting the continued appeal of packaged itineraries among long-haul markets.

Booking patterns for this segment also differed markedly from independent travellers. Travel arrangements were most often managed by a travel agent (37%), tour operator (21%), or an organization on behalf of the traveller (32%), while only one in five (20%) arranged their own bookings.

Among solo travellers (n = 543), just 7 per cent participated in an organized group or tour suggesting this mode of travel remains oriented toward leisure groups and packaged international itineraries rather than individual exploration.

Organized groups and tours could be underrepresented due to tighter itineraries that exclude them from participating if not staying overnight or provides less time to complete a survey if their group is moving onto the next activity.

3.5 Household Income

Visitor income patterns in 2025 suggest a predominantly mid- to high-income market profile. After conversion to Canadian dollars (CAD) and rounding to the nearest thousand for analysis, the largest share of respondents

(28%) reported annual household income between $100,000 and $149,999, followed by $50,000 to $99,999 (26%) and $150,000 or more (36%). Only 10 per cent reported income below $50,000 (Figure 6).

Income distribution varied by season, with higher-income households most common in summer (40%). This aligns with the increased presence of U.S. and international travellers, who tend to have higher spending capacity and longer-haul travel patterns.

Relative to 2019, the 2025 results show a clear upward shift in reported household income, reflecting both inflationary effects and a recovery in higher-spending visitor segments as international markets have rebounded.

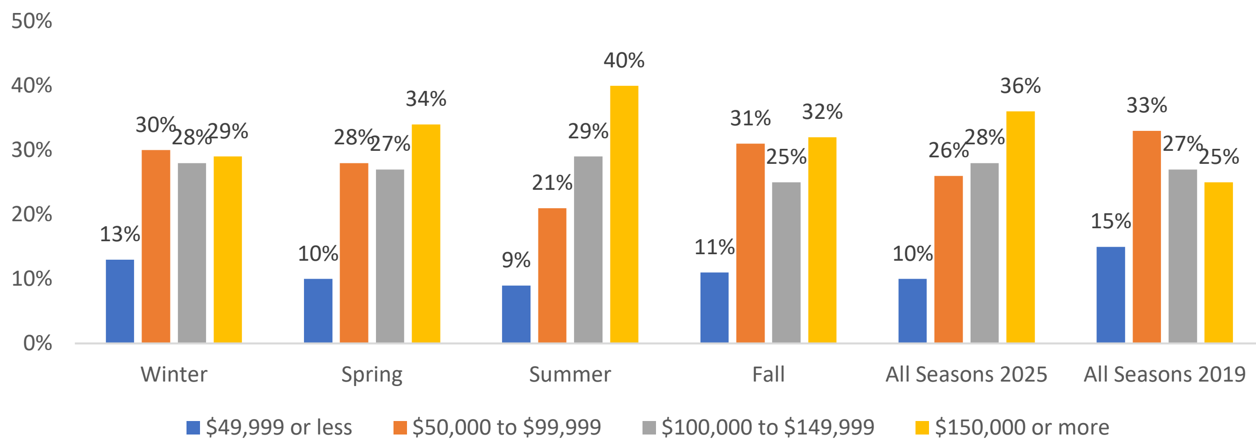


Figure 6 Relative proportions of annual household incomes (CAD$) before tax (n = 790 weighted).

4 Visit Characteristics

The 2025 dataset provided detailed insight into several dimensions of travel behaviour, including trip purpose, destinations visited, length of stay, areas explored within the region, and advance planning timelines. Together, these findings present a comprehensive overview of visitor activity in Greater Victoria, helping to contextualize travel motivations and patterns across seasons.

4.1 Purpose of Visit

Across all seasons, the majority of visitors to Greater Victoria in 2025 were travelling for leisure or vacation purposes (Table 5). This segment was especially dominant in summer (79%), consistent with the higher proportion of international and long-haul travellers during that period. The share of visitors travelling to see family or friends remained relatively stable throughout the year, with a slight increase in winter (26%), likely tied to the holiday travel period.

Travel for business or conference purposes represented a smaller share overall (5%), though these visitors were more common in winter (9%) and fall (5%), aligning with traditional off-peak meeting and event scheduling. A small number of respondents also reported attending sporting events (2%), a niche, but recurring motivation in the local visitor mix.

Table 5 Proportion of respondents visiting for each type of trip purpose (n = 4,002 weighted).

Purpose of Visit	**Winter** *(n = 720)*	**Spring** *(n = 980)*	**Summer** *(n = 1,561)*	**Fall** *(n = 741)*	**All Seasons 2025** *(n = 4,002)*	**All seasons 2019**
Leisure or Vacation	63%	81%	79%	64%	75%	76%
Visit Family or Friends	26%	12%	18%	23%	18%	18%
Business or Conference	9%	6%	1%	5%	5%	6%
Attending a sports event	3%	0%	1%	5%	2%	

While sampling procedures and intercept locations may have modestly under-represented business travellers or those staying with family or friends, the overall distribution underscores that Greater Victoria continues to be perceived primarily as a leisure destination, a positioning that remains consistent with previous years and central to its visitor economy. Future work could incorporate new locations to gain better representation of business visitors and provide insights to improve and grow business visitation.

4.2 Primary Trip Destination

Because respondents may have been visiting one or more destinations in addition to Greater Victoria during their trip, each was requested to specify their primary destination as where they will be spending the greatest amount of time. Greater Victoria was the primary destination for most respondents each season, particularly during winter, and 71 per cent of respondents over the year (Table 6). In summer, with more international and US travellers present, there were more cases of Vancouver or other locations within British Columbia or Canada being the primary destination. Very few respondents had primary destinations within the USA.

Table 6 Locations nominated by respondents as their primary trip destination (n = 1,096 weighted).

Primary Destination	**Winter** *(n = 133)*	**Spring** *(n = 312)*	**Summer** *(n = 457)*	**Fall** *(n = 194)*	**All Seasons 2025** *(n = 1,096)*	**All Seasons 2019** *(n = 986)*
Greater Victoria	91%	71%	67%	88%	75%	71%
Vancouver or Lower Mainland	0%	1%	3%	1%	5%	10%
Other on Vancouver Island	1%	2%	4%	1%	8%	8%
Other in British Columbia	0%	1%	1%	0%	3%	5%
Other in Canada	0%	0%	1%	0%	1%	4%
Washington or Other in USA	0%	0%	3%	0%	3%	2%
Multi Stop Tour with no primary destination	0%	2%	2%	0%	4%	

The results presented above highlight that Greater Victoria is a stand-alone destination for most visitors throughout most of the year. Although the destination is often part of a broader trip itinerary during summer, this is probably driven by itineraries for international and US travellers and/or people having longer vacations, and hence longer trips away from home, at that time of year. Most that specified other primary destinations explained that they had no primary destination and were on a multi stop trip with relatively equal time spent at each stop. Most cited Vancouver Island, Vancouver, Rockies, and Banff as part of their tour with some mentions of USA on the itinerary.

4.3 Duration of Stay and Trip Duration

Median duration of stay in Greater Victoria was three nights; this was the case in all seasons (Figure 7). Median length of respondents' trips (i.e. time away from home) was five nights, ranging from three nights in fall to seven nights over summer. Seasonally these results align with those above for primary trip destination, further indicating Greater Victoria is the main or often sole destination for many travellers for a large part of the year.

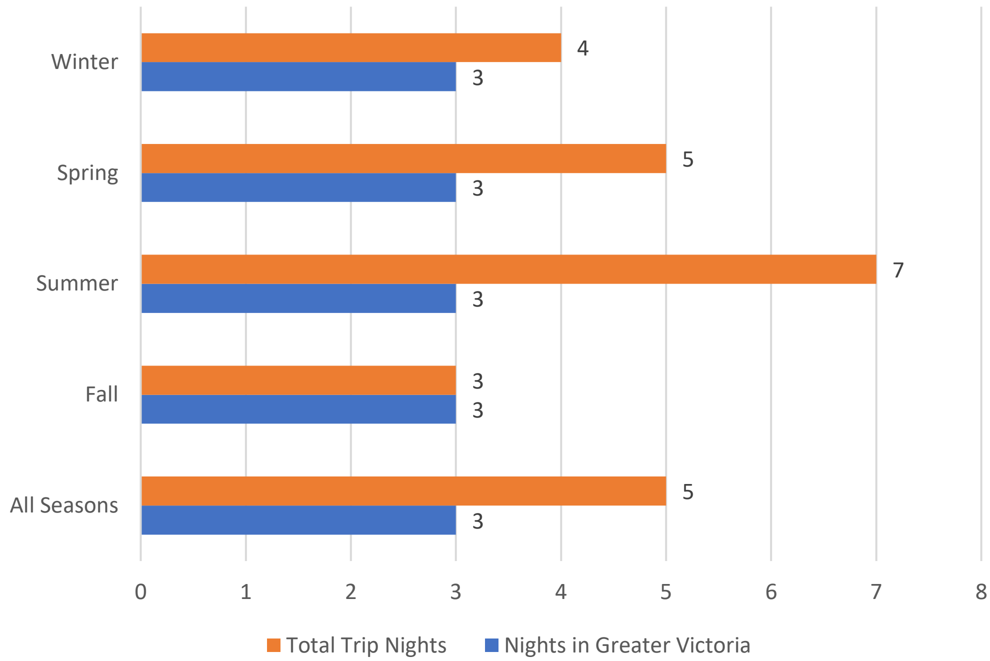


Figure 7 Median duration of visit to Greater Victoria and median total trip duration (n = 3,897 unweighted).

4.4 Areas Visited on Vancouver Island

Across all seasons, 58 per cent of respondents spent their entire trip within Greater Victoria. This varied by season, ranging from 50 per cent in summer to 68 per cent in winter, suggesting that Greater Victoria serves as the primary base for most visitors throughout the year.

For those who travelled elsewhere on Vancouver Island, the most common additional destinations were Central Island and South Island (Figure 8). Visits to the Gulf Islands were less frequent, and very few respondents travelled to North Island. Travel beyond Greater Victoria was highest in summer and lowest in winter, consistent with broader seasonal patterns in mobility and outdoor activity options (Table 7).

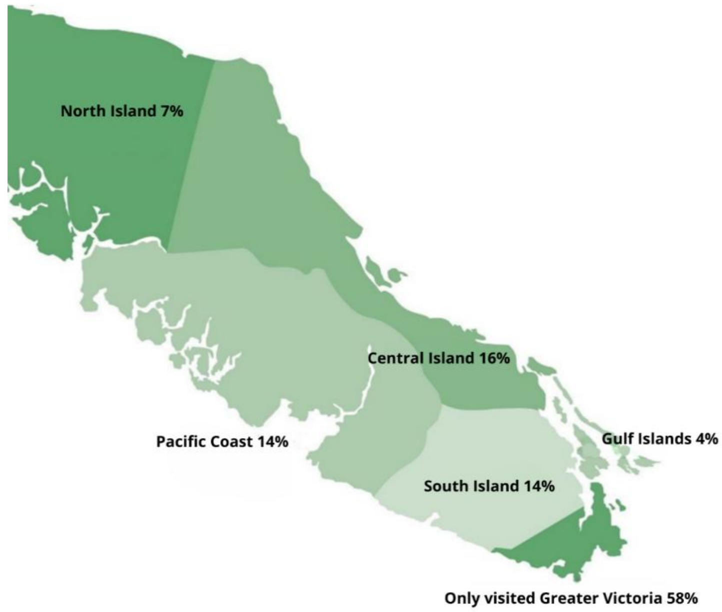


Figure 8 Proportion of respondents visiting areas of Vancouver Island (n = 1,089 weighted). Percentages do not add up to 100% due to multiple responses being allowed.

Table 7 Areas of Vancouver Island outside Greater Victoria visited by respondents (n = 1,089 weighted). Percentages do not add up to 100% due to multiple responses being allowed.

Area Visited	**Winter** *(n = 132)*	**Spring** *(n = 309)*	**Summer** *(n = 454)*	**Fall** *(n = 194)*	**All Seasons 2025** *(n = 1,089)*	**All Seasons 2019** *(n = 986)*
Central Island	10%	19%	23%	10%	16%	21%
South Island	11%	16%	17%	9%	14%	16%
Pacific Coast	5%	14%	16%	8%	14%	11%
North Island	4%	6%	4%	2%	7%	5%
Gulf Islands	3%	3%	8%	6%	4%	2%
Did not visit other locations on island	68%	59%	50%	71%	58%	45%

Areas closest to the City of Victoria continued to attract the highest share of visitation across all seasons (Figure 9). Overall visitation peaked in summer and was lowest in winter, reflecting seasonal travel conditions and the availability of outdoor and touring activities (Table 8).

These results emphasize the importance of Greater Victoria as the primary base for visitors and show that most additional exploration occurs within nearby areas during the summer months.

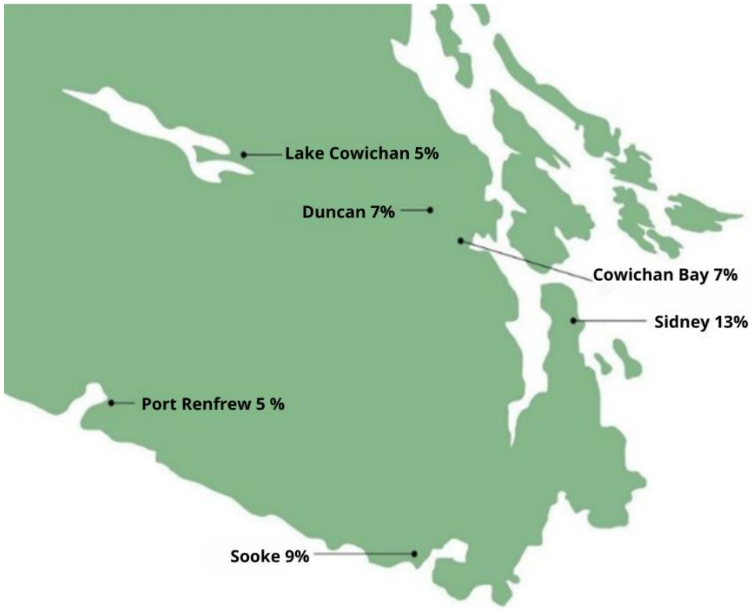


Figure 9 Proportion of respondents visiting Pacific Marine Circle Route locations (n = 1,089 weighted).

Table 8 Pacific Marine Circle Route locations visited by respondents (n = 1,089 weighted).

Location Visited	**Winter** *(n = 132)*	**Spring** *(n = 309)*	**Summer** *(n = 454)*	**Fall** *(n = 194)*	**All Seasons 2025** *(n = 1,089)*	**All Seasons 2019** *(n = 986)*
Sidney\Saanich Peninsula	9%	25%	10%	8%	13%	19%
Sooke	6%	16%	9%	3%	9%	11%
Duncan	7%	12%	6%	2%	7%	8%
Cowichan Bay	5%	9%	7%	4%	7%	7%
Port Renfrew	2%	7%	6%	3%	5%	5%
Lake Cowichan	1%	4%	7%	2%	5%	3%
Did not visit any of these locations	70%	27%	55%	78%	54%	47%

4.5 Advance Planning

The median planning window for visitors to Greater Victoria was two months (n = 3,165). Advance planning peaked in summer (median: three months), reflecting the greater proportion of U.S. and international travellers during that period. These visitors typically require more complex travel arrangements and may have less familiarity with the destination compared to domestic travellers. In contrast, winter visitors, who were predominantly from within Canada, reported the shortest planning windows (median: one month), suggesting a higher rate of spontaneous or short-lead travel.

Planning time also varied by purpose of visit and accommodation type. Leisure and vacation travellers planned furthest ahead, while those visiting for business, conferences, or to see family and friends tended to decide closer to their trip dates. Similarly, respondents staying in hotels, B&Bs, or vacation rentals planned earlier than those staying with family or friends.

Differences were also evident by mode of arrival: visitors flying into Victoria International Airport generally booked further in advance, while those arriving via BC Ferries or driving from elsewhere on Vancouver Island showed the shortest planning horizons.

4.6 Indigenous and Sustainability Factors in Destination Choice

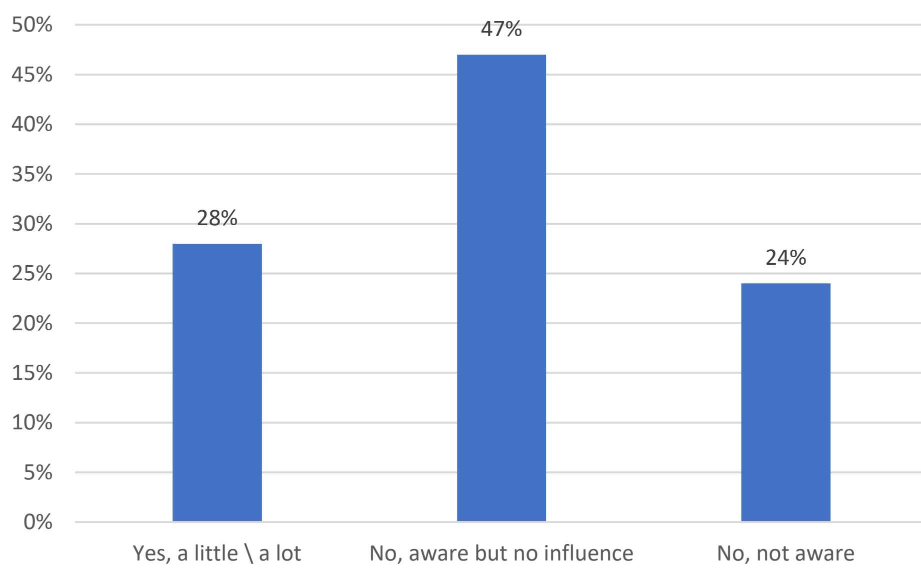
Two new questions were introduced in 2025 to explore the extent to which Greater Victoria's Indigenous heritage, cultural connections with local First Nations, and sustainability credentials influence visitors' decisions to travel to the region. These measures provide initial insight into how travellers perceive and respond to destination values that reflect authenticity, environmental stewardship, and cultural respect, themes of growing importance in global tourism.

Indigenous Heritage

When asked whether Greater Victoria's Indigenous heritage, culture, and connections with local First Nations influenced their decision to visit, just over one in four respondents indicated some degree of influence. Six per cent said these factors had a large influence, and 22 per cent reported some influence (Figure 10). Nearly half (47%) were aware, but not influenced, while 24 per cent were not aware of Greater Victoria's Indigenous heritage or First Nations connections.

These findings suggest that awareness of Indigenous culture is relatively strong, yet its influence on destination choice remains limited for many visitors. The high level of awareness, however, provides a foundation for growing interest in authentic Indigenous experiences and for strengthening partnerships with local First Nations to expand cultural programming, storytelling, and visibility in visitor information.

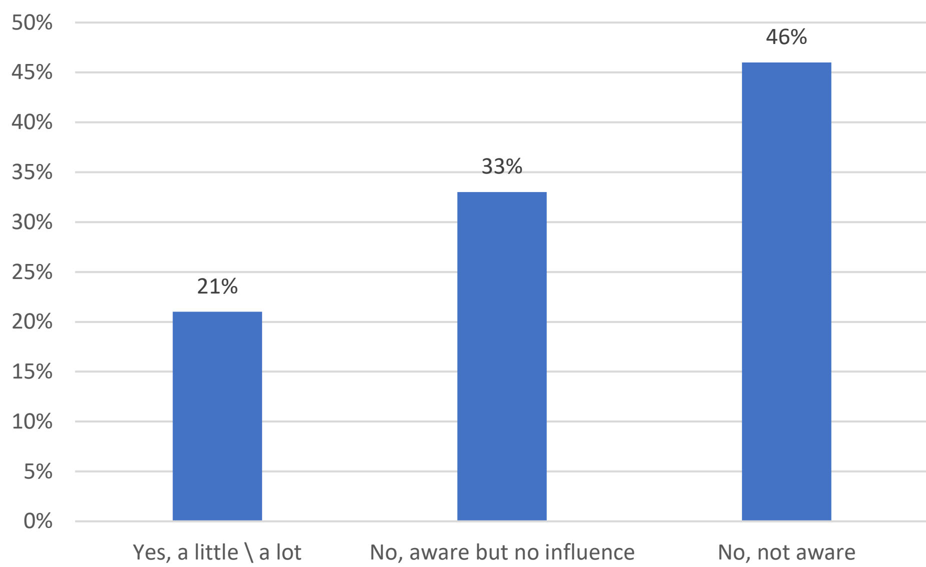
Figure 10 Proportion of visitors influenced by Victoria's Indigenous Heritage (n = 3,899 weighted).
Q23 "When choosing to visit Greater Victoria, did Greater Victoria's Indigenous heritage, culture and connections with First Nations influence your decision?"



Sustainability Credentials

When asked whether Greater Victoria's sustainability credentials influenced their decision to visit, just over one in five respondents reported some degree of influence. Specifically, 7 per cent said sustainability practices had a large influence and 14 per cent indicated some influence (Figure 11). A further 33 per cent were aware of these efforts, but not influenced by them, while nearly half (46%) were not aware of Greater Victoria's sustainability credentials.

Figure 11 Proportion of visitors influenced by Victoria's sustainability credentials (n = 3,907 weighted).
Q22 "When choosing to visit Greater Victoria, did Greater Victoria's sustainability credentials influence your decision?"



These results suggest that while awareness is moderate, influence remains limited. The relatively high share of visitors unaware of these initiatives highlights an opportunity to better communicate sustainability achievements and integrate visible examples, such as waste reduction, green transport options, or local sourcing, into visitor touchpoints and marketing materials.

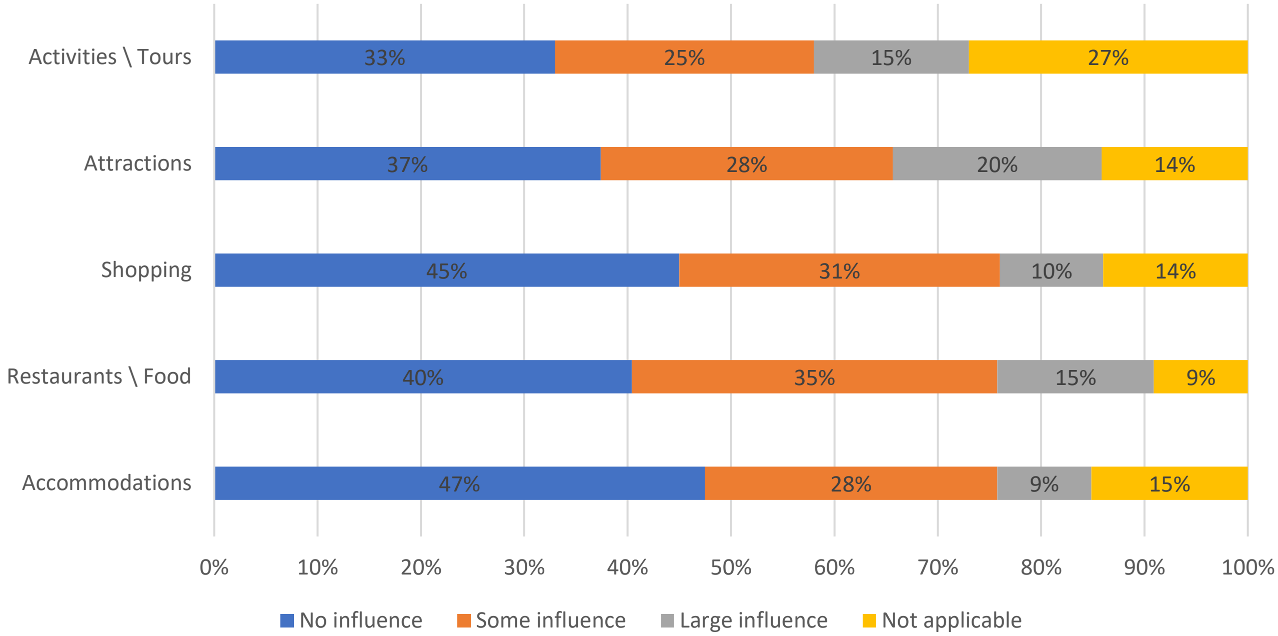
4.7 Influence of Sustainability Considerations

Building on earlier results about the influence of sustainability credentials on destination choice, respondents were also asked to indicate the extent to which sustainability considerations shaped their choices of accommodation, food, shopping, attractions, and activities while visiting Greater Victoria.

Results show that for most visitors, sustainability had limited influence on in-destination decision-making (Figure 12). Across all categories, between 33 and 47 per cent reported no influence, while 25–35 per cent indicated some influence and only 9–20 per cent cited a large influence. The influence of sustainability was strongest for attractions (20% large influence) and activities or tours (15%), suggesting these experiences provide clearer opportunities for visitors to engage with environmental or community-based values.

Restaurants and food (35% some influence) also showed moderate influence, reflecting increased awareness of local sourcing and waste reduction among travellers. In contrast, accommodations (47% no influence) and shopping (45% no influence) were least affected by sustainability considerations, indicating these decisions are still driven primarily by price, location, and convenience.

Figure 12 Influence of sustainability considerations (n = 1,072 weighted).



Overall, the findings reinforce that while interest in sustainable travel is present, its influence on specific trip choices remains modest, presenting an opportunity to better integrate sustainability messaging and visibility across all aspects of the visitor experience.

4.8 Use of Destination Greater Victoria's Services

Prior to or while visiting Greater Victoria, 48 per cent of respondents (n = 1,077) used one or more Destination Greater Victoria (DGV) information services, most often the Visitor Centre (33%) and DGV's website (20%). Usage rates were highest in spring (58%) and summer (49%), aligning with the greater presence of first-time visitors during these seasons.

Compared with 2019, use of the Visitor Centre increased notably (from 26 to 33%), while use of DGV's website remained stable, suggesting that in-person visitor services continue to play a vital role in trip planning and on-site decision-making. These findings reinforce that DGV and its partners have meaningful opportunities to shape both pre-trip and in-destination behaviour for nearly half of all visitors to Greater Victoria.

5 Arrival and Accommodation

Survey data provided detailed information about how respondents arrived in Greater Victoria, where they stayed, and how they booked their accommodation. These insights highlight key points along the visitor journey where Destination Greater Victoria and its partners can most effectively engage travellers, both in the planning phase and during their stay.

5.1 Mode of Arrival

Across all seasons, respondents most frequently arrived in Greater Victoria by BC Ferries from Tsawwassen (44%) or by airline into Victoria International Airport (29%). These remained the predominant modes of arrival throughout the year, particularly in winter, when ferry and air travel together accounted for nearly three-quarters of arrivals (Table 9).

Overall, 15 per cent of respondents arrived by ferry from the United States, though this share varied seasonally, rising to 21 per cent in fall and 17 per cent in summer, but only 3 per cent in winter. Other modes of arrival (4% overall) included seaplane, helicopter, bus from up island, or personal boat.

These patterns are consistent with 2019, though the proportion arriving by air has increased slightly, reflecting stronger recovery of U.S. and international markets and renewed connectivity through Victoria International Airport.

Table 9 Respondents' mode of arrival into Greater Victoria (n = 3,940 weighted).

Mode of Arrival	**Winter** *(n = 478)*	**Spring** *(n = 1,132)*	**Summer** *(n = 1,653)*	**Fall** *(n = 678)*	**All Seasons 2025** *(n = 3,940)*	**All Seasons 2019** *(n = 4,002)*
BC Ferries	46%	39%	51%	32%	44%	43%
Flight into YYJ	38%	35%	21%	34%	29%	26%
Coho Black Ball Ferry	0%	8%	11%	11%	9%	9%
Clipper Ferry	3%	4%	6%	10%	6%	8%
Car from Up Island	8%	6%	4%	6%	5%	6%
Other	7%	7%	7%	7%	5%	4%

Of the respondents who arrived in Greater Victoria on BC Ferries (n = 1,735):

- **69 per cent** travelled <u>with a vehicle</u>
- **24 per cent** travelled as a <u>walk-on passenger</u>
- **7 per cent** travelled on a <u>coach bus</u>

These proportions were generally consistent each season except for spring where a larger proportion (12%) travelled on a coach bus.

Modes of arrival closely reflected the main transportation links available from visitors' regions of origin. Canadian travellers most commonly arrived via BC Ferries, flights into Victoria International Airport (YYJ), or by vehicle from elsewhere on Vancouver Island. Visitors from the United States primarily travelled by air or on one of the three ferry routes from Washington State, while international visitors most frequently arrived by air or BC Ferries.

These patterns are consistent with Greater Victoria serving as the primary destination for most respondents, rather than a secondary stop within a broader itinerary. The distribution of arrival modes also highlights the continuing importance of reliable ferry and air connectivity in supporting both domestic and international visitor access.

5.2 Type of Accommodation

Across all seasons, most visitors to Greater Victoria stayed in commercial accommodations, most commonly hotels or motels (65%), followed by stays with family or friends (14%), and vacation rentals (9%) (Figure 13). Compared with 2019, the share of visitors using vacation rentals declined from 16 to 9 per cent while hotel and motel stays increased proportionally.

This shift likely reflects a combination of tightened short-term rental regulations, rising nightly rates, and a greater return to traditional hotel inventory as pandemic-related capacity constraints eased. Increased availability of competitive hotel packages and visitor preference for managed, service-oriented accommodations may also have contributed to the trend.

Seasonal variation remained modest overall, with camping and RV stays peaking in summer and rare in winter, while "other" accommodation types (including timeshares, self-owned properties or boats, house-sitting, and exchange programs) represented a small, but diverse share.

Overall, the data suggest that Greater Victoria's overnight market has consolidated toward traditional lodging, with vacation rental use becoming a smaller, more regulated niche within the visitor mix.

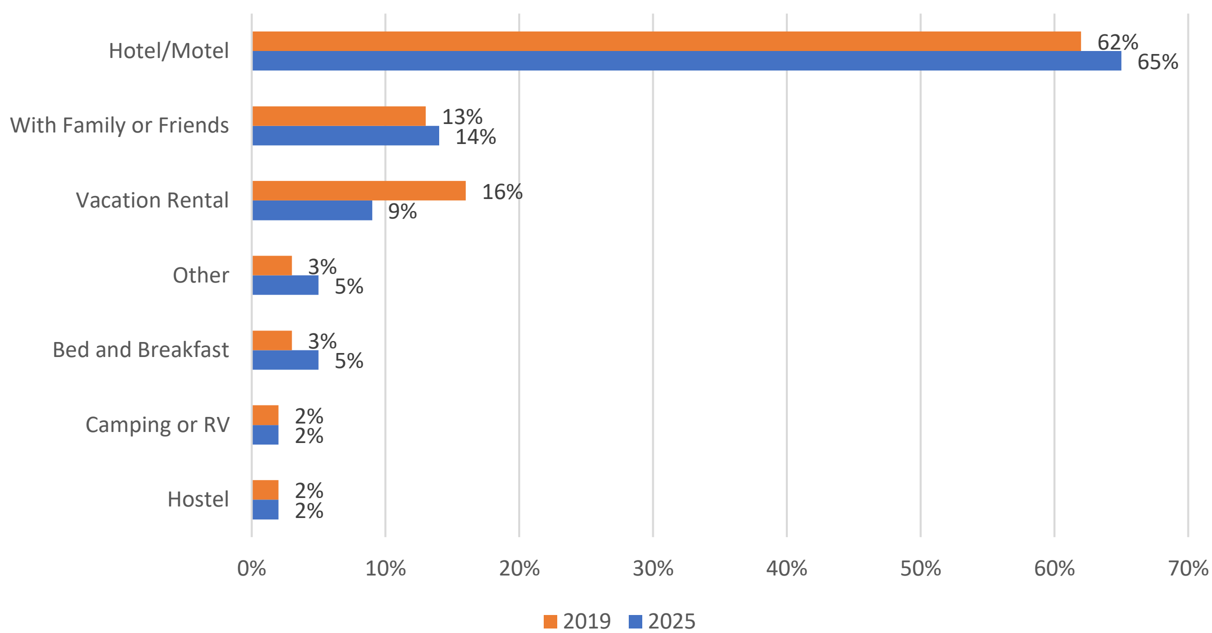


Figure 13 Types of accommodation used by respondents visiting Greater Victoria (n = 3,958 weighted).

Exploration of accommodation preferences by market origin showed that:

- Canadian travellers were more likely than other visitors to stay with family or friends, reflecting a combination of proximity, personal connections, and ease of arranging informal accommodations.
- U.S. visitors most frequently chose hotels or motels and were least likely to stay with family or friends or use hostels, camping, or RV sites, indicating a stronger preference for convenient, service-based lodging.

- International travellers displayed the widest variety of accommodation types, with relatively higher use of hostels, camping, or RV options, along with a notable share staying with family or friends, patterns that suggest a mix of budget-conscious and visiting-relative travel segments.

These distinctions emphasize how accommodation choices align with both distance from origin and travel purpose, underscoring the importance of maintaining a diverse lodging mix to serve different visitor markets effectively.

5.3 Accommodation Booking Method

Among respondents who stayed in commercial accommodation (i.e., not with family or friends), the majority (73%) booked their accommodation online themselves (Figure 14). A smaller proportion (7%) had bookings made by a third party, such as a travel agent, family member or friend, transportation provider (typically BC Ferries or Clipper Vacations), or an association for conference attendees. Only 4 per cent used a travel agent directly, while 5 per cent booked by phone, either in advance or upon arrival.

For those who booked their accommodation online independently (n = 2,490):

- **52 per cent** used an online travel agency (OTA) or travel booking website,
- **36 per cent** booked directly through the property's website, and
- **13 per cent** used a short-term vacation rental platform.

These patterns remained largely consistent across seasons, though fall visitors were somewhat more likely to book directly with accommodations, a trend that may reflect a higher proportion of repeat visitors and greater familiarity with local providers during that period.

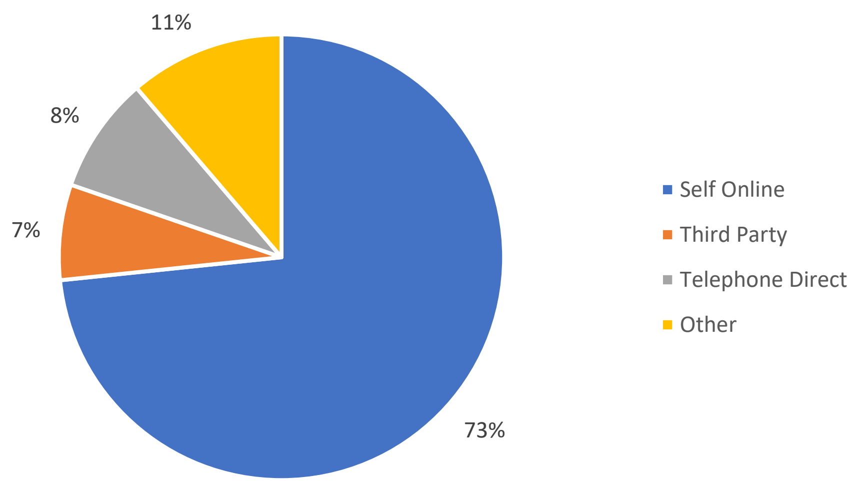


Figure 14 Accommodation booking methods used by respondents (n = 3,381 weighted).

5.4 Accommodation Selection

Respondents were asked to identify the main factors that influenced their choice of accommodation while visiting Greater Victoria. The findings highlight the practical priorities guiding visitor decision-making and how these vary across traveller segments.

Location (62%) and price (40%) were the most frequently cited influences (Figure 15). Other common factors included property amenities (20%), ease of access (15%), and brand reputation or reviews (8–9%), while sustainability practices (1%) were rarely mentioned as a key consideration.

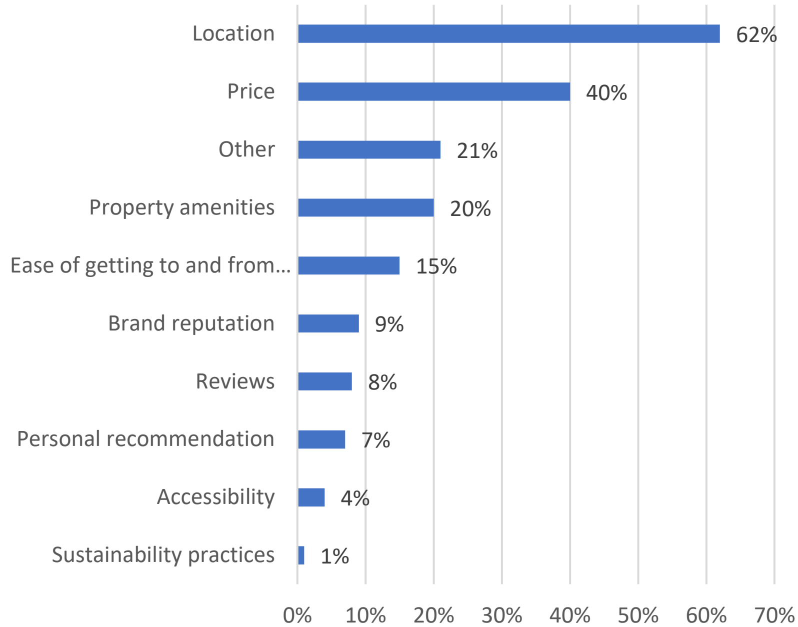
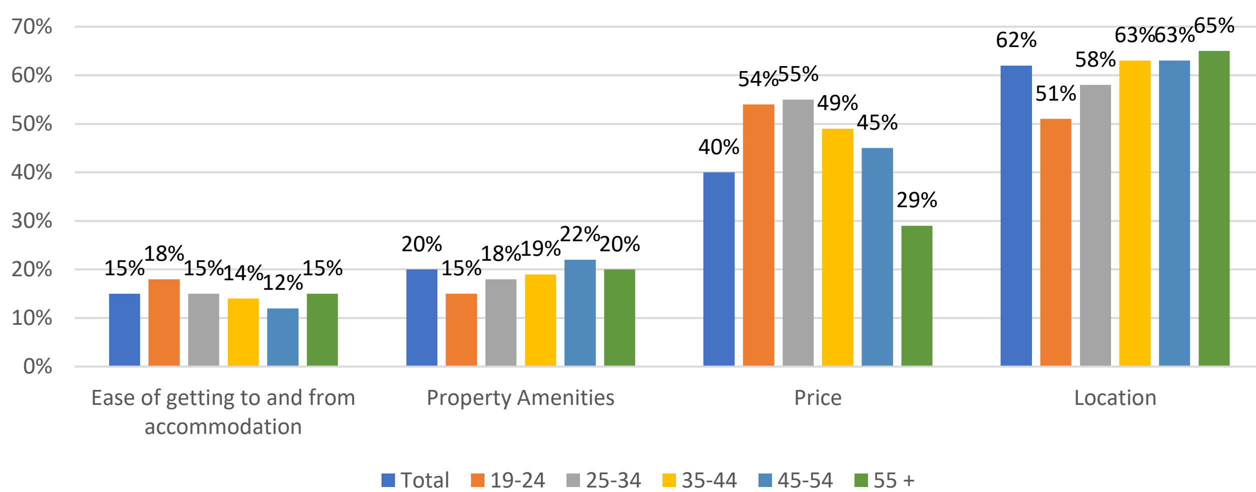


Figure 15 Factors influencing visitors' selection of accommodation (n = 3,369 weighted).

A closer look revealed generational differences in decision drivers. Younger respondents more frequently placed emphasis on price and were less likely to select location, whereas older visitors more often endorsed convenience and proximity over cost (Figure 16). These findings indicate that value and accessibility resonate differently across age groups, underscoring the need for targeted messaging when promoting accommodation in Greater Victoria.

Figure 16 Factors influencing visitors' selection of accommodation by Age (n = 3,369 weighted).



6 Activities and Tours

Data from the online follow-up survey offered detailed insight into the activities, attractions, and guided experiences respondents participated in during their visit to Greater Victoria. The following results provide a broad overview of participation patterns, highlighting the range and relative prevalence of key visitor experiences across seasons.

6.1 Activities

Across all seasons, visitors to Greater Victoria engaged in a diverse range of activities, most frequently walking, general sightseeing, shopping, and visiting parks (Figure 17). These four consistently ranked as the top activities year-round, underscoring the region's broad appeal for independent exploration and outdoor recreation.

Seasonal differences were evident, but modest (Table 10). Walking and sightseeing maintained high participation across all seasons, while shopping remained consistently popular, peaking slightly in winter (79%). Visiting parks and beaches increased in spring and summer, when weather conditions favoured outdoor experiences. Hiking showed similar seasonal strength, highest in summer (18%). Activities such as boating, kayaking, canoeing, golf, and cycling also rose modestly during summer, whereas theatre, festivals, and concerts were most commonly reported in winter (23%), reflecting the city's cultural programming during the cooler months.

Overall, the 2025 activity profile closely mirrors patterns observed in 2019, underscoring the enduring appeal of outdoor recreation and sightseeing as defining features of the Greater Victoria visitor experience.

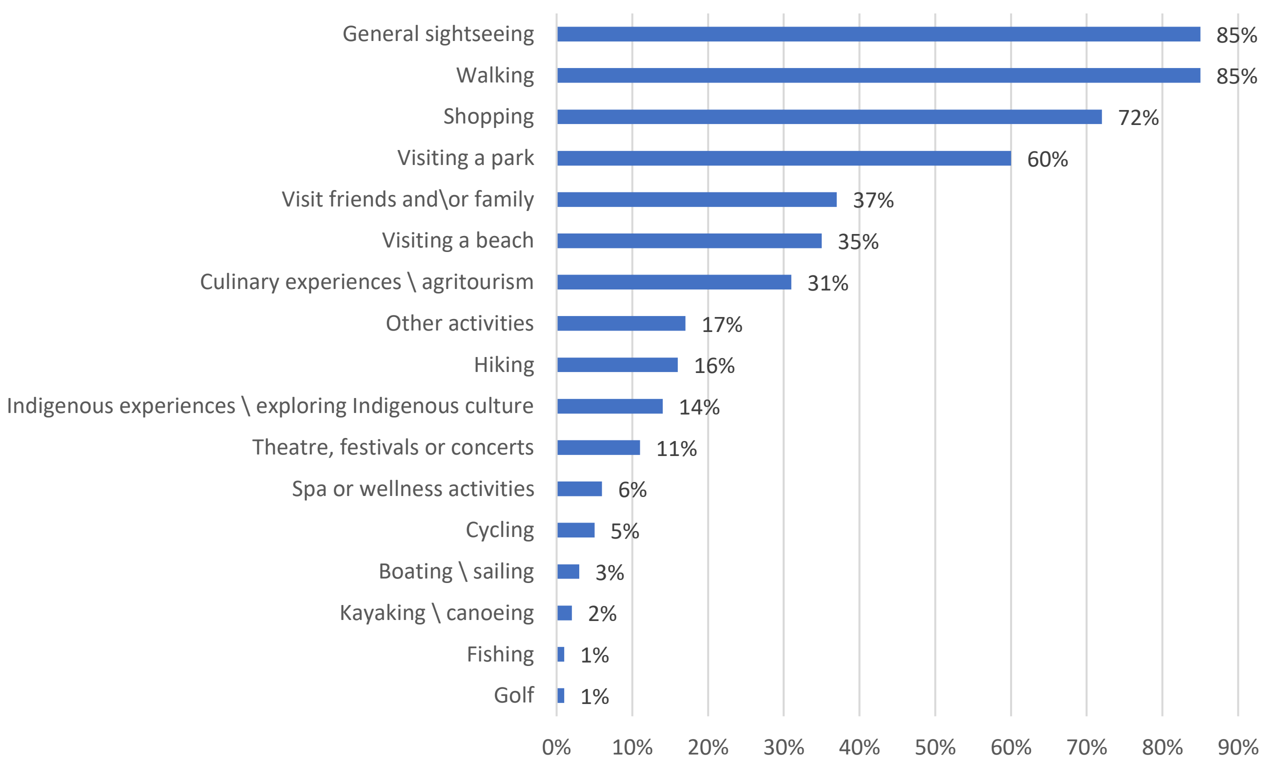


Figure 17 Activities that respondents engaged in while visiting Greater Victoria (n = 1,083 weighted).

Table 10 Proportion of respondents engaging in each activity each season (n = 1,083 weighted).

	Season			
Activity	**Winter (n=133)**	**Spring (n=317)**	**Summer (n=459)**	**Fall (n=194)**
Walking	89%	85%	84%	86%
General sightseeing	77%	89%	88%	78%
Shopping	79%	71%	71%	71%
Visiting a park	56%	60%	65%	52%
Visit friends and\or family	52%	30%	37%	38%
Visiting a beach	33%	33%	40%	29%
Culinary experiences \ agritourism	35%	31%	30%	32%
Other activities	19%	17%	12%	24%
Hiking	16%	15%	18%	10%
Indigenous experiences \ exploring Indigenous culture	12%	15%	13%	17%
Theatre, festivals or concerts	23%	9%	11%	9%
Spa or wellness activities	11%	5%	5%	6%
Cycling	3%	4%	7%	3%
Boating \ sailing	1%	3%	5%	2%
Kayaking \ canoeing	1%	0%	3%	0%
Golf	2%	0%	2%	0%
Fishing	0%	0%	2%	0%

6.2 Tours

Across all seasons, 43 per cent of respondents joined an organized or guided tour, most often a walking, whale watching, or sightseeing tour (Figures 18 & 19). As in 2019, most tours were outdoor based, reinforcing the enduring appeal of Greater Victoria's natural and marine environments.

Tour participation showed strong seasonality, with 54 per cent joining at least one tour in summer compared to 21 per cent in winter, largely reflecting differences in availability and weather conditions. Whale watching, boating, carriage, and winery or brewery tours remained the most seasonally variable (Table 11). Overall, results were consistent with 2019, indicating a stable tour market shaped primarily by seasonal operating patterns rather than shifts in visitor demand. Participation remained below 10 per cent across several tour categories, suggesting potential to grow engagement in wine, brewery and culinary tours, hiking and cycling experiences, Indigenous cultural tours, and paddle-based activities such as kayaking and canoeing.

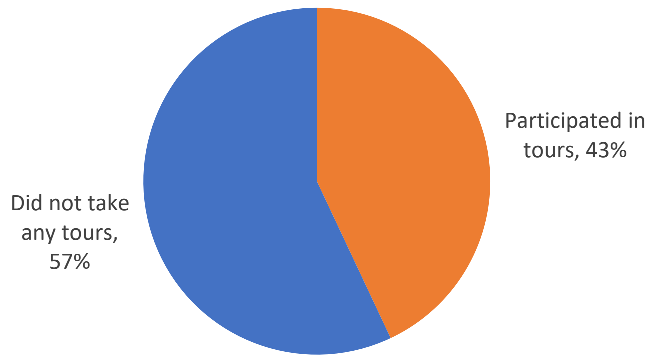


Figure 18 Respondent participation in tours while in Greater Victoria (n = 1,085 weighted).

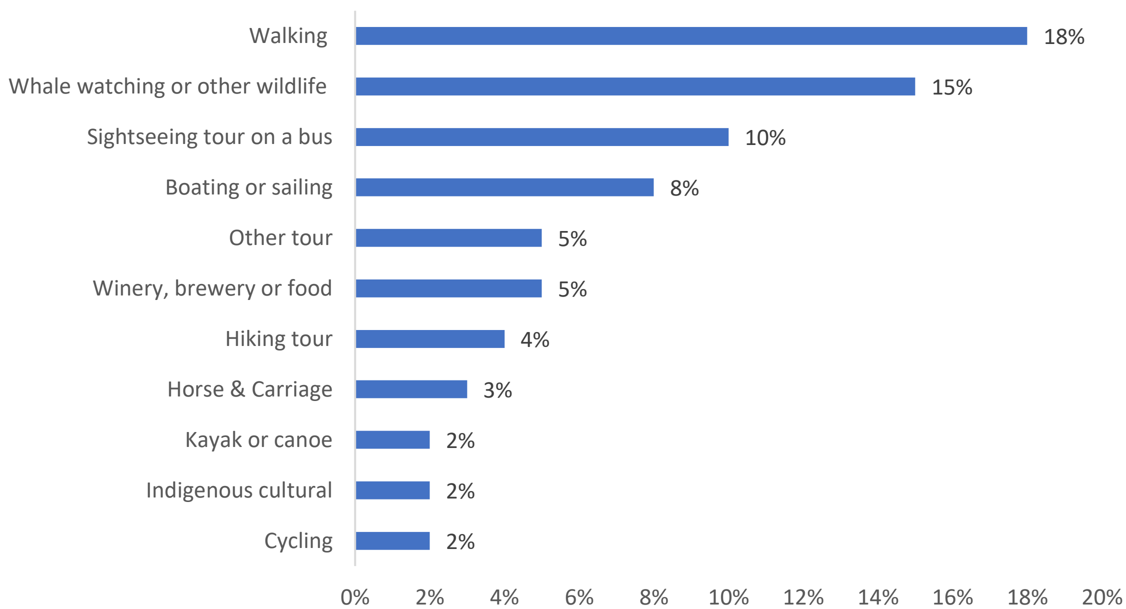


Figure 19 Tours that respondents participated in while visiting Greater Victoria (n = 1,085 weighted).

Table 11 Proportion of respondents participating in each type of tour each season (n = 1,085 weighted).

	Season			
Activity	**Winter**	**Spring**	**Summer**	**Fall**
Walking	12%	20%	21%	9%
Whale watching or other wildlife	4%	13%	22%	9%
Sightseeing tour on a bus	3%	15%	10%	6%
Boating or sailing	2%	9%	10%	5%
Winery, brewery or food	3%	5%	6%	4%
Other tour	2%	7%	5%	3%
Hiking tour	3%	4%	5%	2%
Horse & Carriage	2%	2%	5%	3%
Cycling	1%	0%	5%	0%
Indigenous cultural	2%	2%	3%	3%
Kayak or canoe	1%	1%	3%	0%

7 Visitor Expenditure

For this research, visitor expenditure refers to within-destination spending only and excludes travel costs to and from Greater Victoria. Transportation expenses include local transport. All amounts were converted to Canadian dollars (CAD) using exchange rates current at the time of data collection.

Data from intercept interviews captured anticipated spending, while online follow-up surveys provided actual expenditure. On average, travel parties spent about 30 per cent more than anticipated, with mean actual spending of $2,369 compared to $1,826 estimated during the visit. Both figures represent a notable increase from 2019, when mean actual expenditure was $1,654 and anticipated spending $1,392.

The following section outlines how spending was distributed across key categories and examines variations by visitor type, origin, and season.

7.1 Apportioning Visitor Spending

Across all seasons, nearly two-thirds of visitor spending went toward accommodation (45%) and food and beverage (25%), with most of the remainder spent on shopping and activities (Figure 20). The distribution of spending was consistent across seasons, particularly for accommodation, dining, and local transportation. Attraction-related spending showed modest seasonal variation, ranging from 4 per cent in winter to 9 per cent in summer.

Overall, the 2025 expenditure pattern closely mirrors 2019, confirming that visitors continue to allocate the largest share of their budgets to core travel necessities, with discretionary spending concentrated in shopping and recreation.

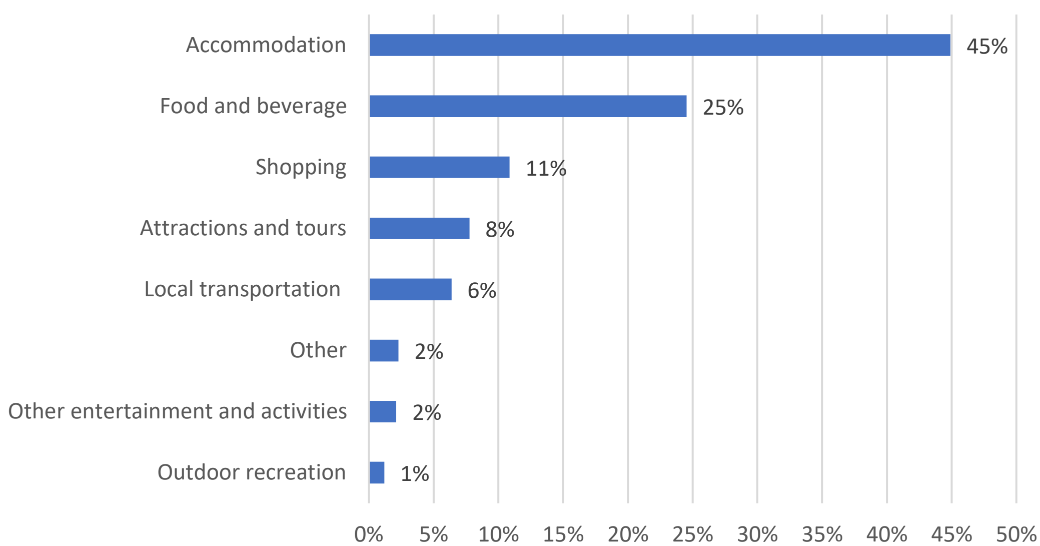


Figure 20 Proportion of respondents' total spending per expenditure category (n = 882 unweighted).

7.2 Expenditure Per Visitor and Per Visitor Per Night

Across all seasons, average total spending per person was $1,185, while spending per person per night averaged $395 (Table 12). Expenditure varied notably by season, ranging from $859 in fall to $1,430 in summer. These differences were driven primarily by accommodation, shopping, and attraction spending, with smaller seasonal variation in food and beverage costs.

Per-night spending followed a similar pattern, lowest in fall and highest in summer, reflecting both longer stays and higher average daily rates during peak months. Overall, these patterns are consistent with 2019, reaffirming that seasonal visitor volume remains the key determinant of tourism revenue for most businesses in Greater Victoria.

Table 12 Mean CAD$ expenditure (a) per person and (b) per person per night (n = 882 unweighted).

Expenditure Category (CAD$ Per Person)	**Winter** *(n = 115)*	**Spring** *(n = 230)*	**Summer** *(n = 372)*	**Fall** *(n = 165)*	**All Seasons** *(n = 882)*
Accommodation	$488	$498	$635	$379	$498
Food and Beverage	$277	$252	$344	$232	$291
Shopping	$123	$112	$151	$106	$129
Attractions	$42	$89	$126	$57	$92
Local Transportation	$60	$74	$94	$48	$76
Outdoor Recreation	$6	$12	$21	$8	$14
Other Entertainment	$37	$13	$30	$23	$25
Other	$11	$44	$30	$8	$27
Expenditure Per Person	**$1,042**	**$1,092**	**$1,430**	**$859**	**$1,185**
Median Duration of Visit	3 nights	3 nights	3 nights	3 nights	3 nights
Expenditure Per Person Per Night	**$347**	**$364**	**$477**	**$286**	**$365**

7.3 Expenditure Based on Visitor Variables

Analysis showed clear variation in average expenditure per person by market origin (Figure 21). Across all seasons, travellers from the United States spent the most (mean $1,446), followed by international visitors ($1,255) and Canadian visitors ($1,050). Seasonal differences were substantial. In summer, spending peaked for all markets, with U.S. visitors averaging $1,753, international travellers $1,583, and Canadians $1,106, reflecting higher accommodation rates, longer stays, and greater participation in paid activities.

In contrast, winter spending was lowest overall, particularly among international visitors ($744) and U.S. travellers ($855), though Canadians maintained relatively strong winter expenditure ($1,079). Spring and fall patterns were more moderate, with Canadian and international spending levels converging and U.S. visitors maintaining a consistent premium.

These results indicate that while U.S. visitors continue to represent Greater Victoria's highest-spending market, domestic travellers have narrowed the gap since 2019, particularly during off-peak seasons. The relative stability of international spending suggests that long-haul visitors remain highly engaged once on-site, despite smaller volumes compared with 2019.

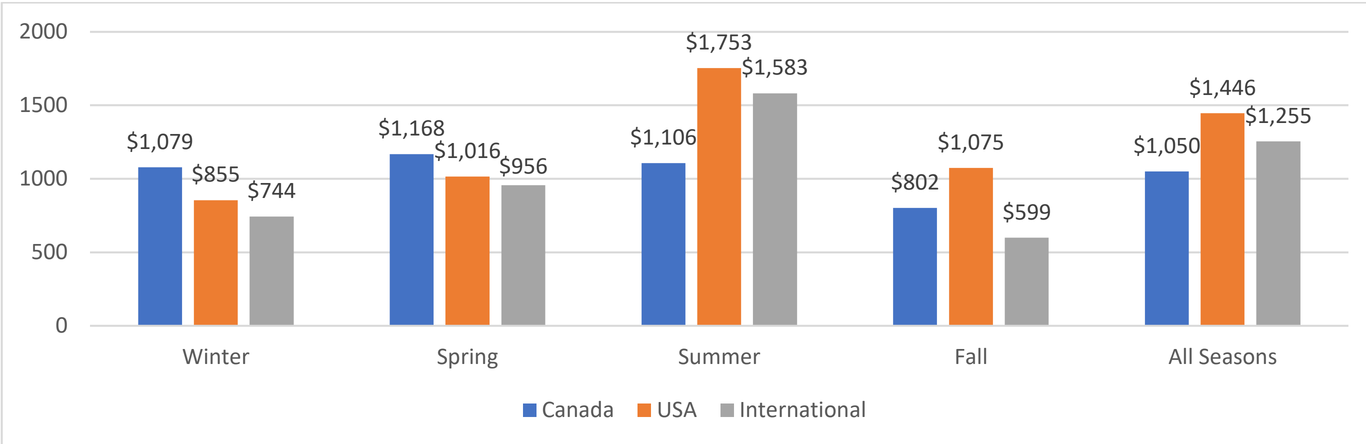


Figure 21 Mean expenditure (CAD$) per person based on market origin (n = 882 unweighted).

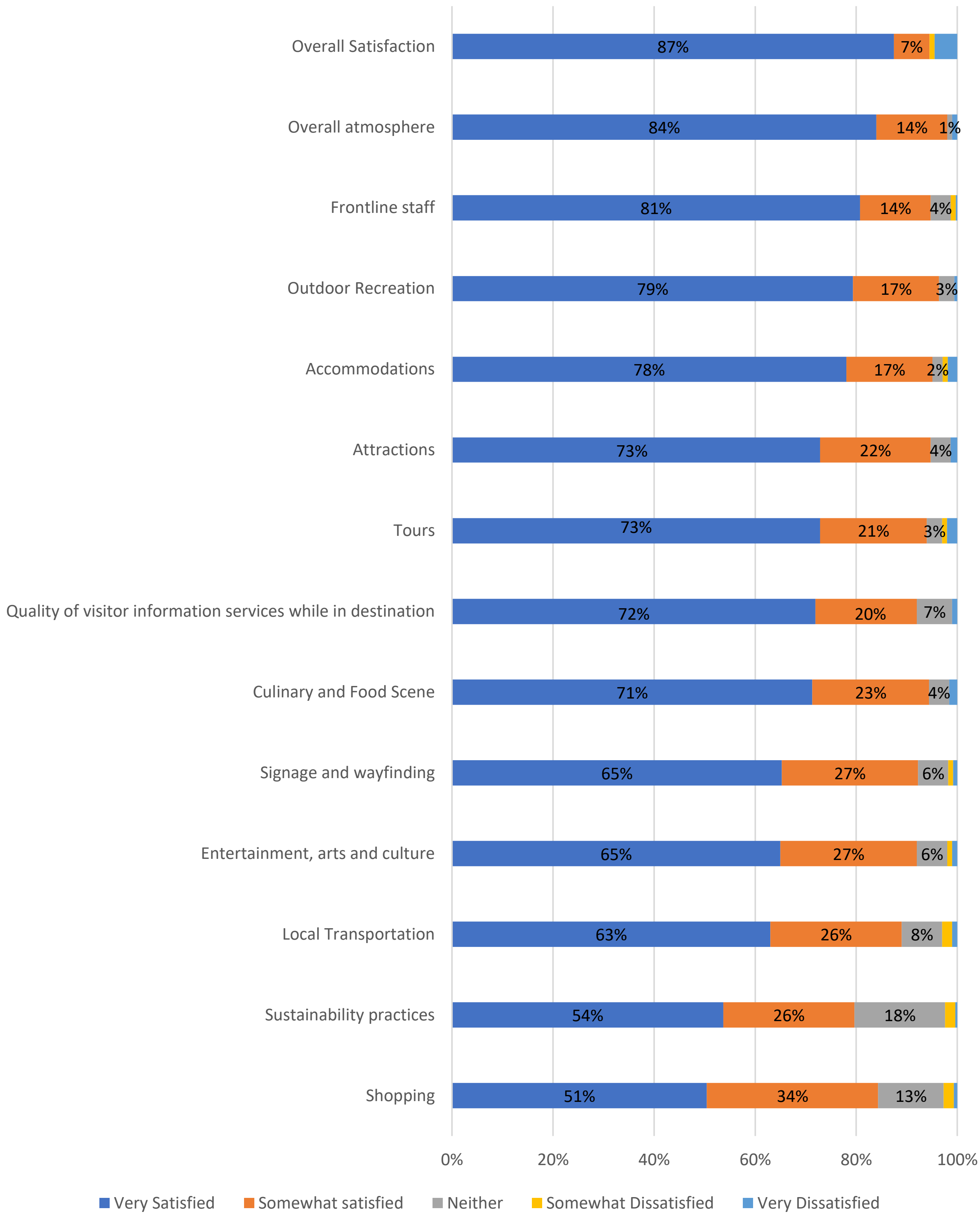
8 Visitor Experience

Data from the online follow-up survey provided detailed insight into respondents' experiences of Greater Victoria, including overall satisfaction, likelihood to recommend, Net Promoter Scores, and perceptions of visitor volumes, trip highlights, and areas for improvement. Together, these findings illustrate how travellers perceive Greater Victoria and how effectively the destination delivers positive and memorable visitor experiences.

8.1 Visitor Satisfaction

Respondents were requested to score their satisfaction with 13 attributes of their visit, as well as satisfaction overall, using a scale from 1 to 5 where 1 = "very dissatisfied" and 5 = "very satisfied". Scores were high for all attributes across all seasons and also each season, with a score of 4.7 for overall satisfaction (Figure 21).

Figure 21 Satisfaction ratings for attributes of visits to Greater Victoria (n = 1,077 unweighted).



Overall satisfaction was very high across all attributes, with most visitors selecting “very satisfied” or “somewhat satisfied.” Dissatisfied ratings were low for every measure. To identify areas with greater potential for enhancement, it is helpful to consider the combined share of neutral ratings along with opportunities to shift “somewhat satisfied” visitors into the “very satisfied” category.

Accommodations showed the highest share of dissatisfied responses, though these remained limited. Culinary experiences, local transportation, shopping, signage and wayfinding, entertainment, and sustainability practices had relatively higher proportions of neutral or somewhat satisfied ratings compared with other attributes. These patterns suggest room to strengthen clarity, value, or ease of experience in these areas and to encourage more very satisfied responses.

Despite these differences across attributes, overall satisfaction remained strong. Very satisfied and somewhat satisfied ratings dominated the distribution for all measures, reinforcing that Greater Victoria continues to deliver a positive visitor experience across seasons.

8.2 Likelihood of Recommending Greater Victoria

Using a scale from 0 (“Not at all likely”) to 10 (“Extremely likely”), respondents rated their likelihood of recommending Greater Victoria as a destination to others. Across all seasons, the mean score was 9.3, indicating a very high overall likelihood of recommendation. Seasonal variation was minimal, ranging from 9.2 in fall to 9.5 in spring. In every season, over 90 per cent of respondents rated their likelihood as 8, 9, or 10, aligning closely with the strong satisfaction levels reported earlier.

At a finer scale, the mean recommendation score increased gradually with respondent age, while showing a slight decline with higher household income. Although differences were small, these results suggest Greater Victoria is most strongly endorsed by its core visitor demographic of mid- to older-age travellers, and that further engagement with higher-income audiences may present an opportunity to broaden appeal.

8.3 Net Promoter Score

Net Promoter Score (NPS) was calculated from respondents’ likelihood-to-recommend ratings. Following standard convention, respondents scoring 9 or 10 were classified as Promoters, those scoring 7 or 8 as Passives, and those scoring 6 or lower as Detractors. The NPS represents the percentage of Promoters minus the percentage of Detractors.

An NPS above zero is generally considered positive; scores above +50 indicate exceptional loyalty and advocacy. Greater Victoria’s consistently high share of Promoters across all seasons reflects a strong overall reputation and visitor endorsement of the destination.

Net promoter score was 78 across all seasons and ranged from 73 in winter to 83 in spring (Table 13), which is very positive and aligned with visitor satisfaction scores. Perhaps not surprisingly, net promoter score for repeat visitors to Greater Victoria (NPS 80) was higher than for first-time visitors (NPS 69) across all seasons (Table 15). While overall NPS was stable from 2019 (NPS 78) to 2025 (NPS 78) there were reductions in NPS for winter and fall (Table 14). This change may reflect evolving visitor expectations and broader contextual factors affecting tourism experiences in recent years.

Table 13 Respondents' net promoter scores (n = 1,072 weighted).

Feedback Type	Winter *(n = 131)*	Spring *(n = 305)*	Summer *(n = 444)*	Fall *(n = 192)*	All Seasons *(n = 1,072)*
Promoters	76%	85%	81%	76%	81%
Passives	21%	13%	14%	22%	16%
Detractors	3%	2%	5%	2%	3%
Net Promoter Score	**73**	**83**	**76**	**74**	**78**

Table 14 Respondents' net promoter scores across survey years (2019 n = 986 weighted; 2025 n = 1,072 weighted).

Feedback Type	Winter	Spring	Summer	Fall	All Seasons
2019 Net Promoter Score	*(n = 177)* ***80***	*(n = 242)* **80**	*(n = 385)* **74**	*(n = 182)* **81**	*(n = 986)* **78**
2025 Net Promoter Score	*(n = 131)* **73**	*(n = 305)* **83**	*(n = 444)* **76**	*(n = 192)* **74**	*(n = 1,072)* **78**

Table 15 Net promoter scores for first-time visitors and repeat visitors (n = 986 weighted).

Feedback Type	First-Time Visitors *(n = 374)*	Repeat Visitors *(n = 695)*
Promoters	77%	82%
Passives	16%	16%
Detractors	6%	2%
Net Promoter Score	**71**	**80**

Among first-time visitors, the Net Promoter Score (NPS) declined from 77 in 2019 to 71 in 2025. While this remains a very strong result, well above the threshold typically associated with visitor advocacy, the decrease suggests slightly lower intensity of recommendation among newer visitors. This may reflect shifting expectations following the pandemic, greater competition among comparable destinations, or rising travel costs influencing perceived value.

Importantly, an NPS of 71 still indicates that first-time visitors overwhelmingly view Greater Victoria positively, though feedback through open ended questions on shortcomings of visits reveal there may be opportunity to strengthen early-visit impressions through enhanced wayfinding, value communication, and first-experience touchpoints such as arrival, transportation, and accommodation quality.

8.4 Expected Visitor Volume

Visitation levels were broadly perceived as meeting expectations across all seasons, with a majority of respondents selecting “about as expected” in every period, peaking in spring (62%), followed by summer (53%), fall (55%), and winter (50%, Figure 22). Summer stood out as the only season with a notable skew toward higher-than-expected demand, with 37 per cent rating visitation as “a little” or “very” high (including 24 per cent a little high and 13 per cent very high). In contrast, winter and fall showed greater sensitivity to softer-than-expected visitation, with 32 per cent in winter and 25 per cent in fall indicating lower-than-expected levels. Uncertainty remained low overall at 6 per cent across all seasons, reflecting strong visitor awareness and confidence in seasonal conditions.

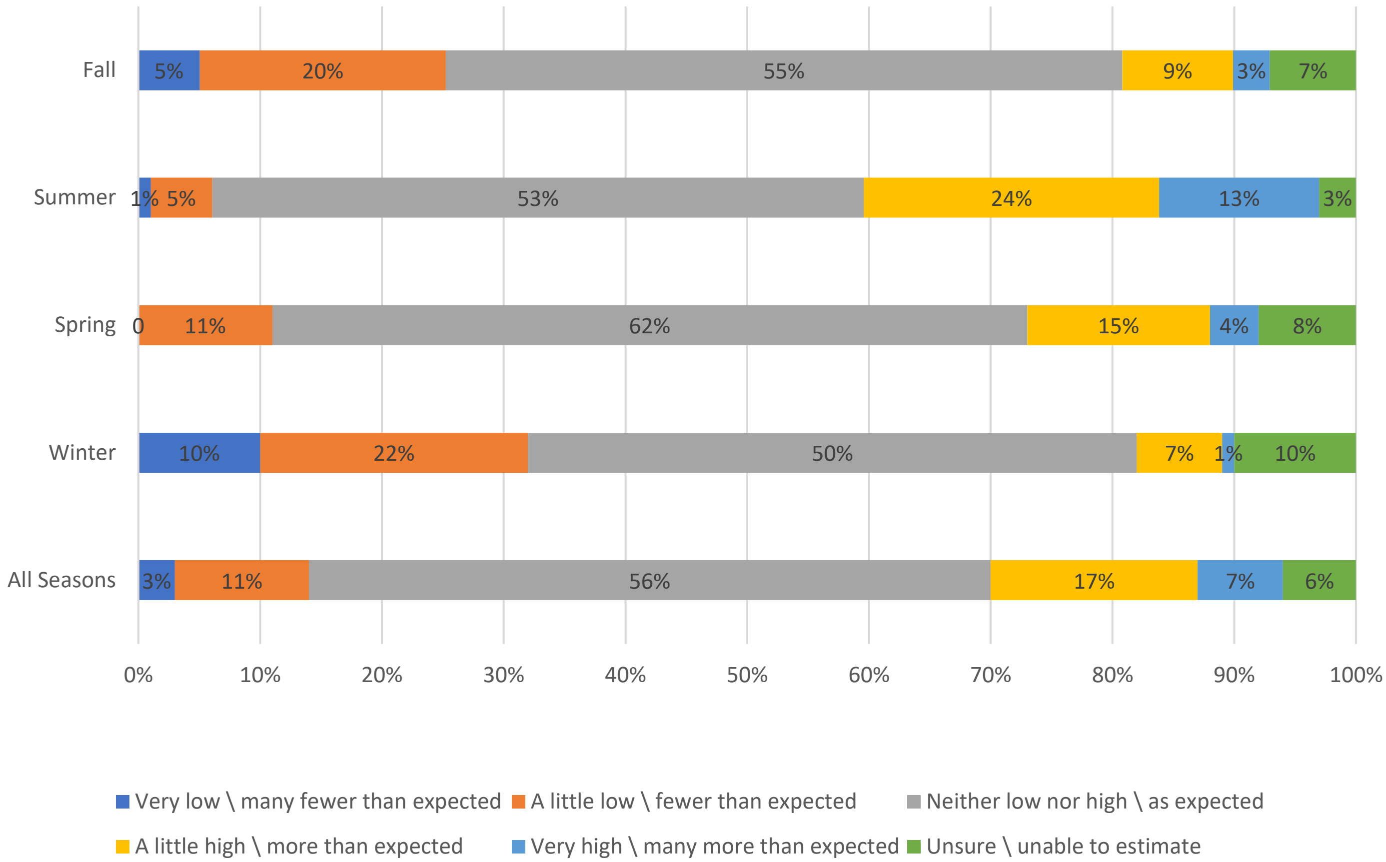


Figure 22 Perceived amount of visitor volume (n = 1,065 weighted).

8.5 Impact of Visitor Volume

Respondents indicated the extent to which their visit experience was impacted by visitor volumes in Greater Victoria by selecting one of five alternatives, ranging from “very negative” to “very positive”. As illustrated in Figure 23, for a vast majority (77%) of respondents across all seasons the volume of visitors present during their visit had no impact on the quality of their experience. This was also the case for most respondents per season, ranging from 76 per cent in summer, which has seasonally the highest visitor volume, to 80 per cent during winter, which has lowest visitor volume (Figure 23).

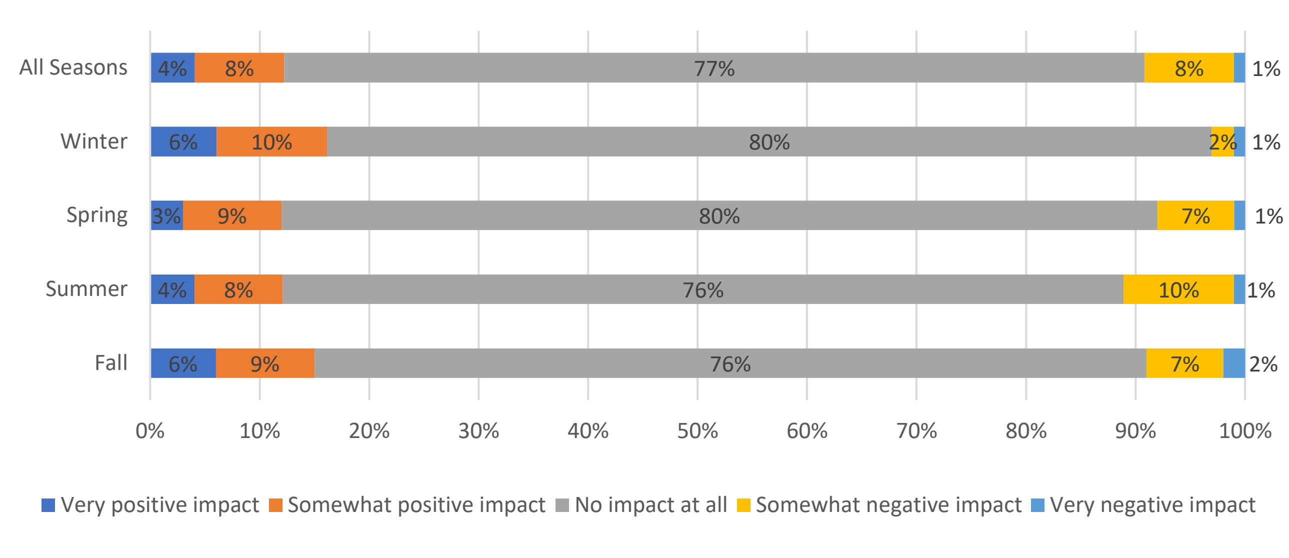


Figure 23 Impact of volume of visitors on respondents' experience in Greater Victoria (n = 1,065 weighted).

Only 1 per cent of respondents overall stated that the volume of visitors present had a very negative impact on their experience in Greater Victoria. Overall, 9 per cent reported some level of negative effect, ranging from 2 per cent in winter to 10 per cent in summer. In contrast, a larger proportion, 13 per cent overall and up to 16 per cent in winter, said that visitor volume had a positive or very positive impact on their visit.

Building on observations first noted in 2019, this year's survey included a deeper examination of how perceived visitor volumes affected the visitor experience. Results show that those who felt visitor numbers were higher than expected were more likely to rate the impact of visitor volume as somewhat or very negative (24%), while most (60%) said it had no impact. Conversely, visitors who perceived fewer tourists than expected were the most positive, with nearly one-quarter (24%) describing the number of visitors as having a very positive effect on their experience.

These findings suggest that while crowding seldom detracts from overall satisfaction, there is value in continuing to manage visitor volumes and communicate capacity strategies, ensuring that growth in visitation remains aligned with sustainable tourism goals and the quality of the visitor experience.

8.6 Highlights of Visit

Online follow-up survey respondents were requested to identify the top three highlights of their visit to Greater Victoria via an open-ended question. Highlights reported most frequently per season and across all seasons are ranked in Table 16 and consistently included Royal BC Museum, food & beverage, The Butchart Gardens, Victoria's Inner Harbour, ease of walking and outdoors & nature. Seasonally, mild weather and shopping were highlights during winter while whale watching and attractions were highlights over summer.

Table 16 Main visit highlights for respondents each season and across all seasons (n = 958 weighted).

Rank	**Winter** *(n = 122)*	**Spring** *(n = 275)*	**Summer** *(n = 395)*	**Fall** *(n = 166)*	**All Seasons 2025** *(n = 958)*	**All Seasons 2019** *(n = 986)*
1	Royal BC Museum	Royal BC Museum	Butchart Gardens	Royal BC Museum	Royal BC Museum	Royal BC Museum
2	Empress Hotel	Butchart Gardens	Inner Harbour / Downtown Core	Inner Harbour / Downtown Core	Inner Harbour / Downtown Core	Food & Beverage
3	Architecture / History / Heritage	Scenery / Oceanfront / Beaches	Scenery / Oceanfront / Beaches	Food & Beverage	Butchart Gardens	Butchart Gardens
4	Food & Beverage	Food & Beverage	Royal BC Museum	Architecture / History / Heritage	Food & Beverage	Inner Harbour
5	Walkability / Compact City	Walkability / Compact City	Food & Beverage	Walkability / Compact City	Scenery / Oceanfront / Beaches	Outdoors & Nature
6	Friendliness of People	Festivals / Events / Buskers	Whale Watching	Friendly People / Locals	Walkability / Compact City	Ease of Walking
7	Weather / Mild Climate	Empress Hotel	Empress Hotel	Butchart Gardens	Empress Hotel	Scenery

8.7 Shortcomings of Visit

Online follow-up survey respondents were also requested to describe the top three shortcomings (if any) of their visit to Greater Victoria via an open-ended question. Shortcomings were listed considerably less often than highlights, which is consistent with the high visitor satisfaction scores reported above. The shortcomings stated most often per season and across all seasons are ranked in Table 17 and consistently included low in-destination affordability generally (high prices), high levels of traffic congestion, lack of parking (mainly downtown), high nightly hotel rates, few options for public transit and inconvenient transit scheduling, poor quality of customer service, and high ferry fares. Closure of some tourism businesses and tours in winter was considered a main seasonal shortcoming.

Table 17 Main visit shortcomings for respondents each season and across all seasons (n = 986 weighted).

Rank	Winter *(n = 122)*	Spring *(n = 275)*	Summer *(n = 395)*	Fall *(n = 166)*	All Seasons 2025 *(n = 958)*	All Seasons 2019 *(n = 986)*
1	Weather / Rain / Cold	Parking / Traffic	Cost / Expensive	Transportation / Access	Cost / Expensive	Low Affordability
2	Limited Things to Do / Closed Early	Transportation / Access	Parking / Traffic	Cost / Expensive	Transportation / Access	Traffic Congestion
3	Homelessness / Street Population	Cost / Expensive	Transportation / Access	Parking / Traffic	Parking / Traffic	Lack of Parking
4	Cost / Expensive	Homelessness / Street Population	Homelessness / Street Population	Homelessness / Street Population	Homelessness / Street Population	High Hotel Rates
5	Cleanliness / Maintenance	Weather / Rain / Cold	Crowding / Too Many Tourists	Weather / Rain / Cold	Weather / Rain / Cold	Public Transit
6	Parking / Traffic	Cost / Expensive	Limited Things to Do / Closed Early	Cost / Expensive	Limited Things to Do / Closed Early	Customer Service
7	Transportation / Access	Cleanliness / Maintenance	Cleanliness / Maintenance	Construction / Noise	Cleanliness / Maintenance	High Ferry Fares

8.8 Enhancing Visits

Along with listing highlights and shortcomings of their visit, online follow-up survey respondents were invited to provide suggestions about ways of enhancing the visitor experience in Greater Victoria.

Suggestions were provided by 18 per cent of respondents (n = 958), a proportion comparable to 2019. Among those providing suggestions, nearly one-quarter (24 per cent) recommended that visits could be improved simply by being of longer duration. As in 2019, respondents frequently acknowledged that trip length was largely within travellers' control rather than the destination's, though many linked shorter-than-desired stays to high accommodation costs and overall affordability constraints.

Approximately 20 per cent of respondents suggested that better weather or less rain would enhance the experience, acknowledging that this was beyond local control. The remaining suggestions were generally practical and infrastructure-related, echoing themes observed in previous waves. The most common ideas, ranked by frequency, included:

- More or cheaper parking options.
- Improved local transportation and access, including rideshare services such as Uber or Lyft.
- Lower prices or improved affordability, particularly for accommodation and food.
- Cleaner, tidier downtown areas.
- More attractions, events, or entertainment options, especially in the evening or off-season.
- Better public transit connectivity to and from gateways such as the ferry and airport.
- Greater dining variety and availability.
- Improved accessibility for visitors with mobility limitations.
- More year-round tourism and business activity.
- Enhanced visitor information about attractions and getting around.

Many of the enhancement suggestions related to broader infrastructure or socio-economic factors that extend beyond the tourism sector's direct influence. However, a notable share focused on service delivery and experience design, areas where tourism operators, hospitality businesses, and the destination marketing organization can continue to make meaningful, visitor-focused improvements on a cost-benefit basis.

Compared with 2019 results, the overall pattern of enhancement suggestions in 2025 remained largely consistent, with weather, affordability, and visit duration continuing as recurring themes. Several shifts were also observed.

Mentions of ridesharing services and public transit connectivity increased substantially, reflecting evolving traveller expectations for seamless mobility within and to the region. Comments related to cleanliness and downtown maintenance appeared more frequently than in 2019, often framed as a desire for a tidier and more welcoming core area.

At the same time, there were fewer references to construction or traffic congestion than in 2019, and requests for more information about attractions or tours were less common, likely reflecting the improved digital resources and pre-trip planning tools now available to visitors.

Overall, 2025 responses indicate that visitors continue to view Greater Victoria as a high-quality destination, with most enhancement suggestions focusing on practical refinements rather than fundamental shortcomings in the visitor experience.

9 Key Insights

The 2025 Visitor Survey results confirm that Greater Victoria continues to perform strongly as a leisure destination, maintaining high satisfaction and advocacy while showing meaningful shifts in visitor mix, travel behaviours, and spending patterns since 2019. The findings reveal an increasingly experience-driven, higher-spending visitor profile, with gradual progress toward year-round balance and growing awareness of cultural and sustainability values.

Visitor Profile
Greater Victoria continues to attract a broad and diverse visitor base, though proportions have shifted slightly since 2019. Canadians represented just over half of all overnight visitors (51 per cent), a modest increase from 47 per cent, reflecting the continued strength of domestic travel in the post-pandemic era. Visitors from the United States accounted for 29 per cent of overnight stays, remaining the largest international segment, while overseas travellers (20 per cent), particularly from the United Kingdom, Australia, and Germany, have rebounded strongly, but have not yet returned to 2019 volumes.

Demographically, the visitor profile remains similar to previous years: two-thirds of visitors were aged 45 or older, and female travellers (60%) continued to make up a slight majority. The median travel party size was two, consistent across seasons and with previous results, reflecting the predominance of couples and small family groups. Larger family parties were more common in summer, whereas couples were more frequent in fall and winter, underscoring the potential of off-peak “couples getaway” marketing.

A small proportion of respondents (4 per cent) first visited Greater Victoria as part of a cruise. Among this group, just over half (56 per cent) said that their cruise stop strongly influenced their decision to return for an overnight visit. While this reflects a very small subset of travellers, it indicates that cruise calls can play a role in encouraging future overnight visitation.

Trip Characteristics
The primary purpose of travel remained overwhelmingly leisure or vacation (75%), virtually unchanged from 2019. Visiting friends and relatives (18%) and business or conference travel (5%) followed, with business travel yet to fully return to pre-pandemic levels.

The median stay length remained three nights, though summer trips were slightly longer than in 2019, reflecting extended itineraries among international and higher-income travellers. Visitation has become more evenly distributed across the year, with stronger winter and shoulder-season representation, an encouraging indication of Greater Victoria’s growing year-round appeal.

Greater Victoria was the main destination for 71 per cent of visitors, down slightly from 74 per cent in 2019, suggesting a modest increase in multi-stop itineraries within British Columbia. Advance trip planning averaged two months, consistent with pre-pandemic patterns, but extended to three months for international visitors, indicating the return of more complex long-haul travel.

Arrival and Accommodation
Arrival patterns closely reflected origin markets. BC Ferries (44%) remained the most common mode of arrival, though the share travelling by air (29%) increased slightly from 2019, linked to stronger U.S. and international recovery. Ground arrivals from within Vancouver Island (22%) held steady.

Hotels and motels (65%) remained the dominant accommodation type, while vacation rentals declined to 9 per cent, down from 16 per cent in 2019. This shift likely reflects regulatory changes, higher pricing, and travellers’ renewed preference for full-service stays. Bed and breakfasts and hostels maintained small, but stable shares.

Booking behaviour continues to evolve digitally: 73 per cent of respondents booked accommodation online, either through online travel agencies (52%) or directly via property websites (36%), with few relying on travel agents. These results reinforce the importance of maintaining competitive visibility and credibility across online platforms.

Activities and Experiences

The most common visitor activities remained consistent with 2019: walking, sightseeing, shopping, and visiting parks. These activities demonstrate the ongoing appeal of Greater Victoria's walkability, natural beauty, and accessible experiences. Participation in culinary, cultural, and outdoor recreation activities continues to expand, reflecting visitors' growing preference for immersive and locally distinctive experiences. 43 per cent of visitors joined an organized or guided tour, most often a walking, whale-watching, or sightseeing tour. Tour participation was slightly higher than in 2019, though still largely seasonal, with summer representing the peak period.

Two new 2025 measures explored the influence of Indigenous heritage and sustainability credentials on travel decisions. Results indicate that 28 per cent of visitors said Indigenous heritage or First Nations connections had some or large influence on their decision to visit, while 21 per cent said the same of sustainability credentials. These represent meaningful awareness levels for new measures, though their influence on actual destination choice remains modest.

At the in-destination level, sustainability considerations most often affected attraction (20%) and activity (15%) choices, while having less influence on accommodation (47% no influence) and shopping (45% no influence). Compared to 2019's exploratory findings, this demonstrates a small, but clear rise in sustainability awareness, signaling an opportunity for Destination Greater Victoria to enhance the visibility and storytelling of sustainable practices across all visitor touchpoints.

Visitor Spending

Visitor spending increased markedly since 2019. Average total expenditure per travel party was $2,369, equivalent to $1,185 per person or $395 per person per night, representing an inflation-adjusted increase in real spending. The 2019 survey reported mean actual spending of $1,654, indicating both price growth and higher engagement in paid experiences.

Accommodation (45%) and food and beverage (25%) continued to account for nearly two-thirds of total visitor spending. Shopping and activities comprised most of the remainder, with consistent seasonal distribution. Attraction spending peaked in summer (9%) and was lowest in winter (4%), while dining and accommodation expenditures rose across all seasons.

Seasonal variation remained significant: average spending per person ranged from $859 in fall to $1,430 in summer, primarily reflecting accommodation pricing and trip duration. U.S. visitors spent the most on average ($770 per person), followed by international visitors ($709) and Canadians ($679). Business travellers spent about 16 per cent more than leisure visitors, consistent with 2019 patterns.

Visitor Satisfaction and Advocacy

Overall visitor satisfaction remained exceptionally high, with a mean rating of 4.7 out of 5. Satisfaction was strongest for atmosphere, hospitality, and outdoor recreation, attributes consistently recognized as Greater Victoria's strengths.

Net Promoter Score (NPS) remained strong at 78 overall, virtually unchanged from 2019 (77). Repeat visitors (NPS 80) were more enthusiastic advocates than first-time visitors (NPS 69), a difference suggesting opportunities to improve first-time visitor orientation and value perception.

Mean likelihood-to-recommend scores ranged from 9.2 in fall to 9.5 in spring, confirming stable, year-round advocacy. More than 90 per cent of respondents rated their likelihood to recommend as 8, 9, or 10, consistent with 2019 levels.

Perceptions of Visitor Volume

The 2025 survey included expanded analysis on perceived visitor volume and its impact on visitor experience, following a recommendation from 2019. Results showed that visitor density rarely detracted from satisfaction:

only 9 per cent reported a negative impact from visitor numbers, ranging from 2 per cent in winter to 10 per cent in summer, while 13 per cent said higher or lower visitor volumes enhanced their experience.

Those who perceived more tourists than expected were most likely to describe a somewhat or very negative impact (24%), while those who perceived fewer tourists than expected were most positive, with nearly one-quarter (24%) describing lower crowding as very positive. These findings reinforce that crowding seldom affects overall satisfaction, but underscore the importance of maintaining effective visitor management strategies during peak periods.

Perceived Strengths and Opportunities

Respondents most frequently cited the Inner Harbour, Butchart Gardens, the Royal BC Museum, and local food and beverage experiences as highlights of their visit. These align closely with 2019 findings, but show greater emphasis on culinary experiences and urban vibrancy.

Perceived challenges also echoed those from 2019, but have grown more pronounced, particularly regarding affordability, traffic congestion, and parking availability. These issues reflect both inflationary pressures and increased visitor expectations.

Opportunities remain to enhance the visibility of sustainability initiatives, strengthen Indigenous tourism partnerships, and encourage regional and off-season dispersal. Improving communication around value and accessibility, especially for first-time and high-income visitors, can further support sustainable growth and long-term visitor loyalty.

Collectively, these findings confirm that Greater Victoria remains a high-satisfaction, high-advocacy destination with a stable visitor base and renewed potential for balanced, values-driven growth. The 2025 results highlight the destination’s resilience, its capacity to adapt, and its ongoing evolution toward more meaningful, sustainable, and experience-centered travel.

10 Acknowledgements

Destination Greater Victoria wishes to acknowledge the team at Discovery Research for their work coordinating and conducting data collection.

Destination Greater Victoria thanks management and staff of the Royal BC Museum, as well as staff at the Victoria Visitor Centre, for their support in facilitating data collection throughout the study.

11 Appendices

1 Methods

This section outlines the approach adopted for the 2025 Visitor Survey along with details of data collection, sampling, and analysis. The methods were consistent with those used in the 2019 study to ensure direct comparability over time. Fieldwork occurred across all four quarters of the year, providing a comprehensive and seasonally representative profile of overnight visitors to Greater Victoria.

By replicating the 2019 study design including fieldwork procedures, weighting methods, and analytical approach, the 2025 Visitor Survey ensures direct comparability across both years. This methodological continuity strengthens the validity of trend analysis and provides Destination Greater Victoria with a reliable foundation for ongoing monitoring of visitor patterns and economic impact.

1.1 Approach

The 2025 study replicated the two-phase research design used in 2019 to capture both on-site visitor characteristics and post-visit reflections. This mixed-method approach allowed for the collection of trip-related details while visitors were still in destination, followed by deeper insights once they had returned home and could reflect on their overall experience.

Two linked surveys were developed and administered to achieve these objectives:

1. **Intercept Survey:**
   A semi-structured, in-person interview conducted with overnight visitors at key visitor locations across Greater Victoria. Interviews were carried out throughout the year in high-traffic areas such as the Inner Harbour, downtown core, and major attractions. This phase captured essential visitor profile information, including origin, purpose of visit, party composition, trip planning, mode of arrival, type of accommodation, and key activities undertaken during their stay.

2. **Online Follow-Up Survey:**
   A structured questionnaire completed by a subset of intercept participants after their trip. Respondents received an email invitation to complete the follow-up survey upon returning home. This phase gathered additional detail on total trip expenditures, satisfaction with the visit, highlights, and perceptions of Greater Victoria as a destination.

Data collection was distributed across all four seasons (winter, spring, summer, and fall) to ensure the findings reflected year-round visitation patterns. Interviews were conducted on all days of the week and at a range of times of day, capturing visitors with varying itineraries and travel motivations. Sampling plans were developed to align with benchmark seasonal visitor volumes and to reflect the diversity of the region's overnight visitor population.

1.2 Data Collection

Destination Greater Victoria engaged Discovery Research to support the 2025 Visitor Study through the development of survey instruments, sampling plans, and coordination of fieldwork and data collection. The surveys were designed to capture a comprehensive range of parameters relevant to understanding Greater Victoria's overnight visitor population, replicating the successful two-phase structure used in 2019 while adding new topics of interest.

Intercept Survey

Intercept surveys were conducted in person by trained interviewers at four key visitor locations where travellers typically spend extended time during their stay:

- Inner Harbour and Visitor Centre
- Downtown shopping area
- Royal BC Museum forecourt
- Fisherman's Wharf

Potential respondents were approached on a random basis and screened to confirm they were overnight visitors rather than local residents or day trippers. Each interview lasted approximately 10 to 15 minutes and comprised up to 25 questions, recorded electronically by the interviewer.
Survey topics included:

- Gender, age, and advance planning
- Purpose of visit and previous visitation
- Market origin
- Travel party size and composition
- Duration of visit
- Accommodation type and booking method
- Mode of arrival
- Activities during the visit

No incentives were offered for completing the intercept survey. At the end of each interview, respondents were thanked for participating and invited to provide an email address to receive a short online follow-up survey after returning home.

Data collection occurred in four seasonal waves: winter, spring, summer, and fall, ensuring the final dataset represented year-round visitation patterns (Table 1). During each wave, a team of interviewers was scheduled across all locations, days of the week, and core times of day to achieve a balanced and representative sample.

Table 1 Timing of each wave of data collection for intercept surveys.

Wave	Data Collection Period	Season	Months of Season	Notes
1	June–July 2024	Summer	June, July, August	Peak season with highest proportion of international visitors
2	October–November 2024	Fall	September, October, November	Shoulder period with leisure and business mix
3	January–February 2025	Winter	December, January, February	Primarily domestic and repeat travellers
4	April–May 2025	Spring	March, April, May	Increasing regional and early international visitation

A total of 13,674 people were approached during the intercept phase. After screening, approximately one-third qualified as overnight visitors, resulting in 4,044 completed intercept interviews that form the core dataset for this report.

Online Follow-Up Survey

Approximately three weeks after their visit, participants who agreed to further contact received an email invitation to complete an online follow-up survey. This structured questionnaire included up to 27 questions and required 15 to 20 minutes to complete. Respondents could enter a draw to win a $250 gift card as an incentive.

The online survey gathered additional details about:

- Main trip destination and regions visited

- Activities and tours undertaken
- Travel-party demographics (age, gender, relationships)
- Expenditure while in Greater Victoria
- Annual household income
- Visit highlights and areas for improvement
- Satisfaction with key aspects of the experience
- Recommendations to enhance the visitor experience

A total of 1,103 respondents completed the online follow-up survey, providing valuable post-visit data on spending patterns, satisfaction, and perceptions of Greater Victoria.

1.3 Sampling Effort

The sampling plan developed for the 2019 study was replicated in 2025 to ensure consistency and comparability across both research years. Each seasonal wave included roughly 48 interviewer days and 360 interview hours, with adjustments made as needed to provide balanced coverage across all locations and days of the week. Interviewers approached potential respondents opportunistically within designated areas, engaging visitors who appeared to have time and interest in participating.

Across all four seasons, a total of 13,674 individuals were approached. Of these, 28 per cent declined to participate, 26 per cent were ineligible because they were residents of Greater Victoria, and 15 per cent were ineligible as day visitors rather than overnight guests.

In total, nearly 30 per cent of all approaches resulted in a completed interview, yielding 4,044 intercept surveys. Seasonal sample sizes ranged from 486 respondents in winter to 1,684 in summer. Weighting was applied to align the final dataset with benchmark levels of seasonal visitation. The number of completed interviews varied naturally between sampling locations, reflecting differences in visitor activity, but remained relatively consistent across seasons within each site (Table 2).

Table 2 Proportion of respondents completing intercept survey interviews at each data collection location.

Location of Data Collection	**Winter** *(n = 486)*	**Spring** *(n = 1,162)*	**Summer** *(n = 1,684)*	**Fall** *(n = 712)*	**All Seasons** *(n = 4,044)*
Royal BC Museum	36%	35%	27%	53%	36%
Inner Harbour and Visitor Centre	45%	23%	41%	30%	35%
Fisherman's Wharf	4%	17%	16%	7%	13%
Downtown Shopping Area	15%	24%	15%	10%	16%

Sampling effort for the online follow-up survey was determined by the number of intercept participants who agreed to be contacted after returning home and provided an email address. Across all seasons, approximately 60 per cent of intercept respondents consented to follow-up and were invited to complete the online survey. Of those contacted, 47 per cent completed the questionnaire, resulting in a total of 1,017 valid responses.

Response rates were consistent across seasons, with sample sizes ranging from 118 respondents in winter to 439 in summer. As with the intercept data, weighting was applied to align the follow-up results with benchmark seasonal visitation patterns (Table 3).

Table 3 Consent to participate in Online Follow-Up Survey by season and across all seasons.

Consent to follow up	Winter (n = 475)	Spring (n = 1,122)	Summer (n = 1,647)	Fall (n = 663)	All Seasons (n = 3,905)
Agreed to follow up	73%	60%	57%	58%	60%

Table 4 Online Follow-Up Survey invitations and response rates by season and across all seasons.

Sampling Effort	Winter	Spring	Summer	Fall	All Seasons
Online Survey Invitations Sent	347	673	939	385	2,343
Online Surveys Completed	133	317	459	194	1103
Response Rate	38%	47%	49%	50%	47%

1.4 Weighting and Analysis

To maintain consistency with 2019 and offset potential seasonal sampling variation, data were weighted using benchmark visitor volumes from Statistics Canada and local tourism indicators. Weighting ensured that each quarter reflected its true contribution to annual visitation.

Analyses were conducted using descriptive statistics, including frequencies and means. Seasonal and annual results were compared with the 2019 baseline to identify shifts in market composition, trip purpose, and visitor behaviour. Data are reported primarily as percentages or averages, rounded where appropriate.

To offset potential skew from relative over or under sampling per season, sample sizes were normalized by aligning with Statistics Canada's benchmarks for seasonal visitor volumes. Data counts for intercept surveys and online follow-up surveys were multiplied by weight factors to ensure sample proportions for each season (1) reflected the seasonal proportions of Greater Victoria's visitor volumes for 2024 established by Statistics Canada

Table 4 Weighting factors for (a) intercept survey data and (b) online follow-up survey data for each season.

			Intercept Surveys			Online Follow-Up Surveys		
Timing of Data Collection	Season	Benchmark Proportion of Visitor Volume *	Count (n)	Proportion of Raw Sample	Weight Factor	Count (n)	Proportion of Raw Sample	Weight Factor
October 2024	Fall	17.6%	1031	25.49%	0.691	235	21.31%	0.827
January 2025	Winter	12.0%	1058	26.16%	0.459	383	34.72%	0.346
April 2025	Spring	28.7%	920	22.75%	1.263	242	21.94%	1.309
July 2024	Summer	41.6%	1,035	25.59%	1.627	243	22.03%	1.890
			4,044			986		

* 2024 Statistics Canada data for annual visitor volume, adjusted to account for seasonal changes in visitor arrivals and hotel occupancy during 2024

Survey	Winter	Spring	Summer	Fall	All Seasons
Intercept Interview Surveys	486	1162	1,684	712	4,044
Online Follow-Up Surveys	133	317	459	194	1103

Table 5 Sample sizes for intercept interview surveys and online follow-up surveys after weighting.

Descriptive statistics have been used for analysis and reporting results, and sample sizes reflect which of the two surveys the data are drawn from. Sample sizes also differ across results because analysis is based on responses per individual question and not all respondents answered all questions. Totals often sum to more than 100% where respondents were able to provide multiple responses to one question. The dataset is also sufficiently robust to explore patterns at finer scale when required or support further analysis using statistical tests. Data for most variables in the sample were not distributed normally and non-parametric tests will apply.

1.5 Profile of Sample

Gender and age distribution remained central benchmarks for assessing the representativeness of the 2025 dataset. Past research in Greater Victoria has consistently shown a higher proportion of female respondents and a concentration of travellers aged 45 and older. Given the relative stability of the destination's market composition, similar demographic patterns in 2025 were anticipated and serve to validate the comparability of results across survey years.

The 2025 findings align with those expectations. Across all seasons, 60 per cent of respondents identified as female and 38 per cent as male (Table 6). Seasonal variation was minimal: the gender split was narrowest in winter (54% female, 44% male) and somewhat wider in spring (64% female, 34% male). No recent external data source provides a reliable benchmark for the gender composition of overnight visitors to Greater Victoria, Vancouver Island, or British Columbia. The gender distribution in this report therefore reflects those who agreed to participate in the intercept and online surveys. Research on survey participation consistently finds that women respond at higher rates than men. The gender profile presented here should be viewed as a profile of respondents, not as a definitive estimate of the underlying visitor population.

Respondents identifying as non-binary or another gender were recorded when self-reported, accounting for less than 1 per cent of the sample. This low rate mirrors broader survey trends where participants may elect not to specify an alternate gender identity, reinforcing that representation of this group remains small, but acknowledged in ongoing visitor research.

Table 6 Gender of respondents visiting Greater Victoria (n = 3,910 weighted).

Gender	Winter *(n = 474)*	Spring *(n = 1,122)*	Summer *(n = 1,647)*	Fall *(n = 668)*	All Seasons *(n = 3,910)*
Female	54%	64%	60%	60%	60%
Male	44%	34%	38%	37%	38%
Non-Binary	0%	1%	1%	1%	0%
Other	0%	0%	0%	0%	0%

The largest share of respondents were aged 55 to 64 years (20 per cent), followed by those aged 65 to 74 years (18 per cent) and 45 to 54 years (17 per cent). In total, roughly two-thirds of respondents were over the age of 44 (Figure 1). Age distribution patterns were generally consistent across seasons, though some variation was observed: during summer, there were proportionally fewer respondents aged 25 to 34 years and more in the 45 to 54 year range. The proportion of visitors aged 75 years and older was notably higher in winter, particularly compared with summer (Table 7). Overall, the age distribution in 2025 showed the same general pattern as in 2019, with older age groups representing the largest share of visitors.

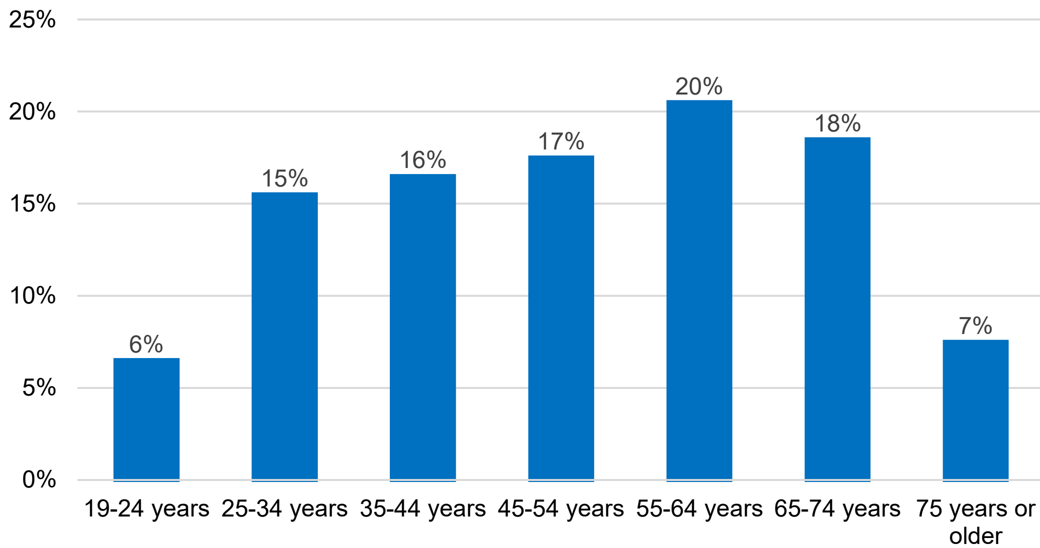


Figure 1 Proportion of respondents within each age category (n = 3,913 weighted).

Table 7 Proportion of respondents within each age category each season (n = 3,913 weighted).

Age Category	**Winter** *(n = 475)*	**Spring** *(n = 1,122)*	**Summer** *(n = 1,648)*	**Fall** *(n = 668)*
19 to 24 years	8%	5%	6%	5%
25 to 34 years	18%	13%	16%	14%
35 to 44 years	15%	16%	18%	14%
45 to 54 years	13%	14%	22%	15%
55 to 64 years	15%	20%	19%	23%
65 to 74 years	19%	23%	14%	20%
Over 74 years	11%	8%	5%	8%

An analysis of gender distribution within each age group showed a generally consistent 60 per cent female to 40 per cent male ratio across all age categories. The only notable deviations were slightly fewer males in the 65 to 54 year age range. These differences are minor and unlikely to influence overall results, and may simply reflect the typical visitor profile for Greater Victoria.

DESTINATION GREATER

VICTORIA