

DESTINATION GREATER
VICTORIA



2020
BUSINESS PLAN

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MESSAGE FROM THE CEO



As summer turns to fall each year, our team is hard at work building a business plan to maximize our visitor economy - growing our industry responsibly and sustainably year-round. It is satisfying to reflect on what we have accomplished in the past several years. We reflect on the past as we look for new innovations and opportunities, and build a plan with associated budgets and balanced scorecard targets from the ground up in a process called “zero-based budgeting.”

If 2019 taught us anything it is not to take growth in our industry for granted. While experienced industry practitioners and destination marketers know that our business is cyclical and growth can never be assumed, it may be easy to take the business for granted when we have steady year-over-year growth as we experienced in Greater Victoria from 2013 to 2018. While 2018 was a fantastic year, as the tourism board we knew when entering 2019 that it would not replicate 2018 due to the many one-time conventions, events and sports tourism opportunities in that year. Like much of Western Canada, Greater Victoria experienced softer than expected tour and transient (last-minute independent) business in

2019. It will still be a healthy tourism year - likely the second- or third- best in recent memory – but as expected we will not reach the heights of 2018. Full 2018 business results will be analyzed and shared in our 2019 Annual Report due in spring 2020.

Whereas Destination Greater Victoria started 2019 with justified trepidation, we commence 2020 with cautious optimism. We have a much stronger foundation of meetings and convention business in 2020 than we did in 2019. This business is also well-distributed across the year. Industry players are adjusting to be more competitive with tour and travel business, and we are refreshing and revising all aspects of our marketing program to drive improved results in our short-haul marketing efforts.

We are also keenly aware of risks in our macro-economic environment. Recovery of the Greater Victoria visitor economy has been strong and sustained. At a certain point in time this economic growth was expected to slow and the visitor economy would experience a downturn. One of our main international source markets, Germany, experienced a technical recession this year due to decreased orders in its manufacturing and software industries. Moreover, we are keenly aware that there are major disruptions possible in important long-haul markets such as China and the United States due to trade tensions. Brexit, however resolved, will put short-term constraint on travel from the United Kingdom as that country adjusts to new international relationships. Election years in the United States are traditionally softer travel years, and we have ongoing tension between British Columbia and Canadian oil-producing provinces such as Alberta and Saskatchewan. These all represent important source markets for Greater Victoria’s visitor economy.

Greater Victoria remains a beacon of travel, conference and hospitality excellence. There is tremendous desire to visit and high satisfaction among customers that do. The entire Destination Greater Victoria team contributed to this plan and are prepared to work hard to execute it. In 2020 Greater Victoria will host some important events, such as GoMedia 2020 (Destination Canada’s global media conference), the Travel and Tourism Research Association’s 50th Annual International Conference and the prestigious CanSPEP meetings conference.

This will be year four of our five-year 2017-2021 Strategic Plan. A priority for 2020 will be to receive input and craft our next five-year plan, with the support of our accommodation sector, industry at large, Greater Victoria residents, and elected officials. We will engage in a meaningful process and there is already broad agreement on key themes, such as the importance of sustainability.

Destination Greater Victoria is proud of its 2020 Business Plan and looks forward to executing this plan together with our partners.

Sincerely,

A handwritten signature in black ink that reads "Paul Nursey". The signature is fluid and cursive, written in a professional style.

Paul Nursey
CEO, Destination Greater Victoria

BUSINESS PLAN OVERVIEW

SETTING THE SCENE

Destination Greater Victoria has a highly motivated management team and staff dedicated to delivering its mandate through the vision and mission statements:

Vision: Destination Greater Victoria will be internationally recognized as a leader in sustainable tourism development, ensuring Greater Victoria remains one of the top destinations in the world.

Mission: We inspire the world to experience our destination.

Destination Greater Victoria has had this vision statement since 2017, as the industry and community balance responsible growth and sustainability. This is done in lock step with the community, while remaining competitive with other destinations worldwide. This is a delicate balance, but as an industry association that is also supported, enabled and working in partnership with local governments, the organization is up to the challenge.

DESTINATION GREATER VICTORIA BRAND FAMILY

DESTINATION GREATER
VICTORIA



2020: YEAR FOUR OF A FIVE-YEAR PLAN

In 2017, Tourism Victoria (now Destination Greater Victoria) renewed the long-term Municipal and Regional District Tax (MRDT) funding agreement. The agreement is similar to other MRDT agreements for destinations in British Columbia, but also includes responsibility for sales and marketing of the Victoria Conference Centre as it embarked on an ambitious five-year plan entitled: *Accelerating Growth and Community Prosperity: A Roadmap for a Prosperous and Vibrant Tourism Industry in Greater Victoria*.

The plan was designed to cement recovery of the visitor economy, which commenced in 2014. The goal was to structurally shift the industry from less reliance on the summer season to becoming a more year-round destination, address the need to balance the portfolio by having multiple segments performing well simultaneously (i.e. leisure tour, leisure transient, meetings and conferences, and sports), and providing the business and policy case for private and public investment in the visitor economy.

THE KEY OBJECTIVES OF THIS PLAN REMAIN

- 1. Grow Rate and Volume:** Destination Greater Victoria will focus efforts with an emphasis on driving revenue and yield.
- 2. Address Seasonality:** Promote Greater Victoria as a year-round destination by capitalizing on shoulder season and off-peak season opportunities.
- 3. Destination Management:** Work with industry and government on select, critical policy and supply-side drivers of destination success.
- 4. Tell Tourism's Story:** Increase appreciation and support for Greater Victoria's vibrant visitor economy.

SUCCESS AGAINST THE BUSINESS TARGETS

Destination Greater Victoria's current Strategic Plan covers the period from 2017 to 2021. Three years have been completed with significant success in achieving business targets. In some cases, many five-year goals have been achieved. However, we are reminded that our industry is cyclical and business can never be taken for granted. The following table provides a snapshot of where Destination Greater Victoria currently is relative to various targets originally set out in the five-year Strategic Plan.

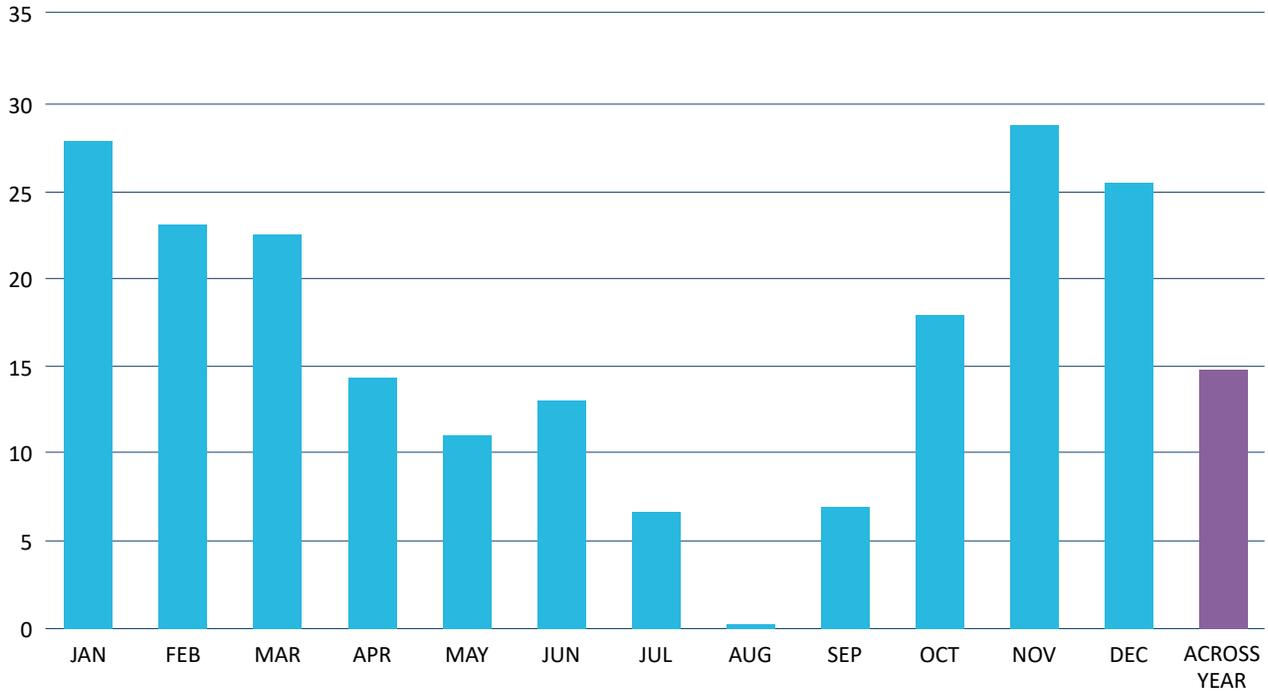
ORIGINAL TARGET	ORIGINAL DESCRIPTION	RESULTS TO DATE	ANALYSIS
Reach and maintain an average occupancy rate of 72.2% on a consistent basis.	Greater Victoria reached record occupancy of 70.1% in 2015. A target occupancy rate of 72.2% provides a stretch target.	Hotel occupancy rate in Greater Victoria has exceeded the 72.2% target each year since 2015. From 2016 the average annual rate has been 74.7%, with a high of 76.4% for 2018.	This metric ensures Greater Victoria benefits from a sufficient volume of visitors to ensure year-round vibrancy, allowing the accommodation sector to re-invest consistently.
Grow RevPAR in Greater Victoria to \$110 by 2021.	Greater Victoria reached RevPAR of \$103.65 in 2015 demonstrating a very significant increase over 2014 when RevPAR was \$90.24. It is important to consolidate this growth and provide incremental lift.	RevPAR for Greater Victoria hotels has exceeded the \$110 target each year since 2015. From 2016 average annual RevPAR has been \$128, with growth each year and a high of \$141 in 2018.	This target drives a focus on yield and ensuring Greater Victoria attracts customer segments with resources and returns to benefit all segments of the industry, from hotel operators to farmers' markets and all businesses in between. Our success in this area demonstrates the significant revenue contributed into the visitor economy.
Reach and maintain an average off-peak season occupancy rate of 59%.	This target will allow businesses, shops and services to remain open year-round, adding to the vibrancy and excitement of our destination.	Off-peak season occupancy rate in Greater Victoria has exceeded the 59% target each year from 2016. The average rate has been 62.7%, with growth each year and a high of 64.6% in 2018.	We have achieved the goal of increasing business to the shoulder and off-peak seasons. This has been concerted strategic work and we are proud that our small and medium sized businesses have a more stable and vibrant year-round customer base.
Tell Tourism's Story.	Work with partners to increase appreciation for the Experiential Tourism sector in Greater Victoria by 8% between 2017 and 2021.	The target was set prior to benchmark information being available. Benchmarking demonstrated extremely high support for tourism and significant work has been done to maintain appreciation.	This metric was last measured in 2018 through a survey by Insights West, which showed 98% of residents support the tourism industry in Victoria. This will be measured again next year as we prepare to develop the 2022-2026 Strategic Plan.

BUSINESS AT A GLANCE

Delivering strategy on addressing seasonality.

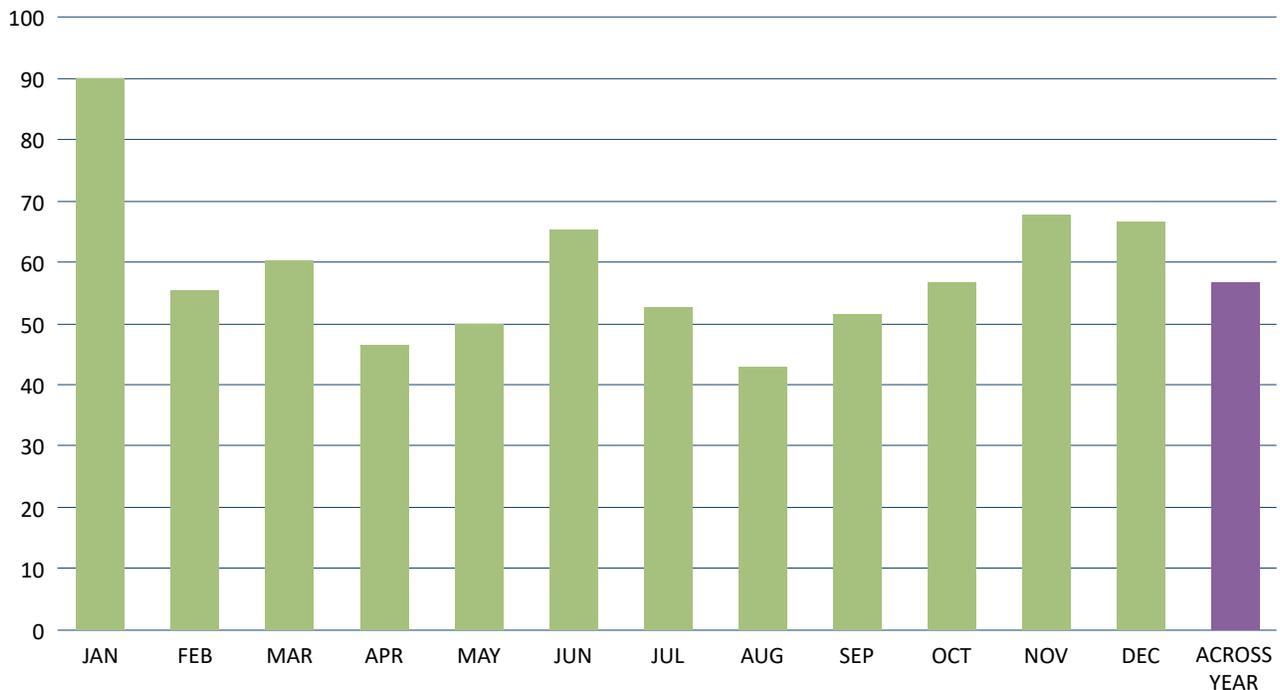
From 2014 to 2018, occupancy rate in Greater Victoria has increased every month but growth is most pronounced in the shoulder and off seasons.

PERCENTAGE GROWTH IN OCCUPANCY RATE FROM 2014 TO 2018



Similarly, from 2014 to 2018 there has been substantial growth in RevPAR with shoulder and off season increases greater than for peak season.

PERCENTAGE GROWTH IN REVPAR FROM 2014 TO 2018

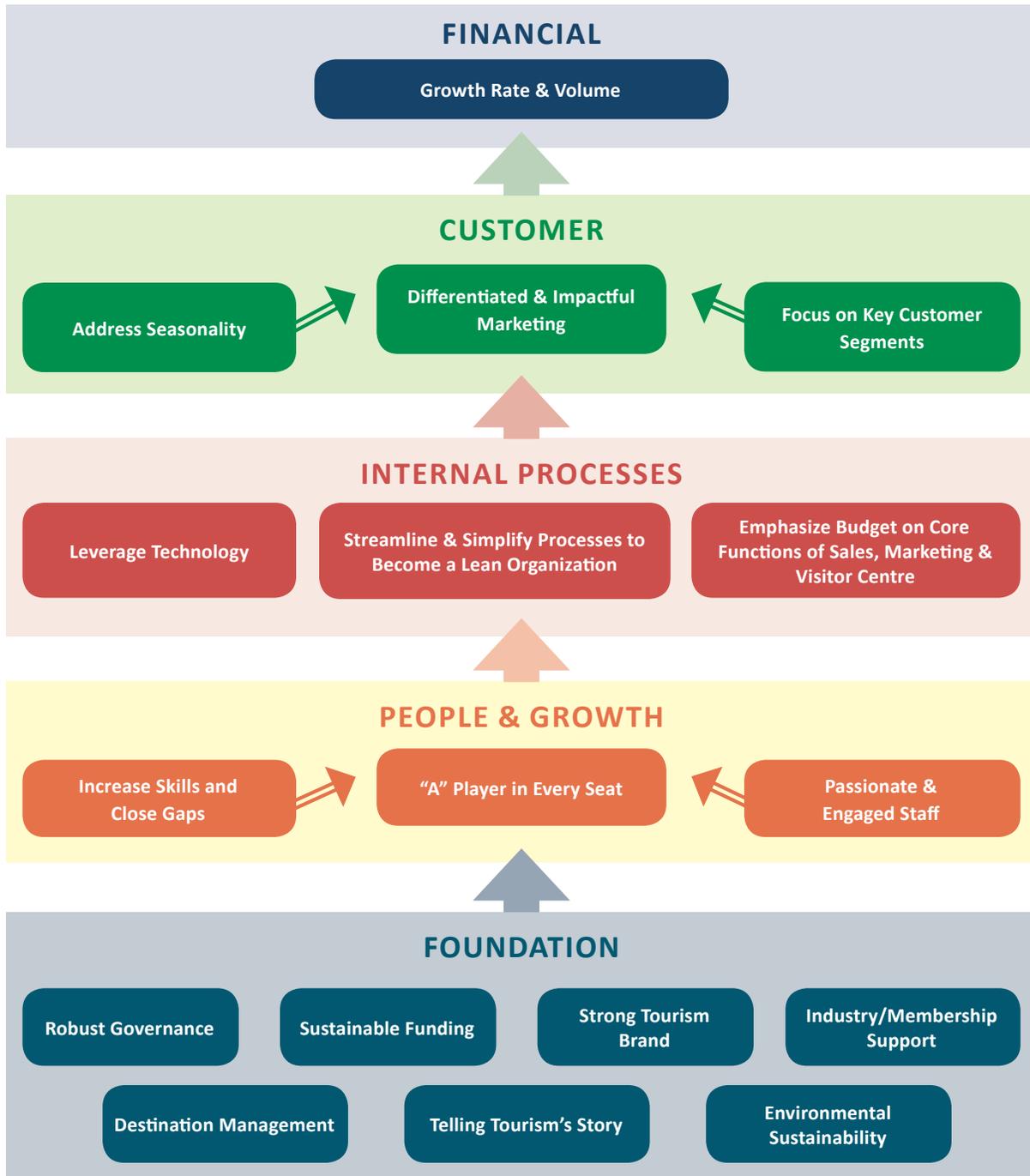


Source: Chemistry Consulting Group - Victoria Tourism Bulletins

DESTINATION GREATER VICTORIA STRATEGY MAP

STRATEGY FOCUSED

Destination Greater Victoria is a strategy-focused organization and pursues its business plan vigorously to achieve desired business results for its member businesses. Destination Greater Victoria also measures return on investment (ROI) on every initiative and adjusts its tactical plans accordingly.





TRANSLATING STRATEGY INTO EXECUTION

Destination Greater Victoria subscribes to Kaplan and Norton's *Strategy Focused Organization* to translate objectives into measurable outcomes. As such, we use Balanced Scorecard as a performance management framework and have for many years. Balanced Scorecard is a performance metric used in strategic management to identify and improve various internal functions of a business and resulting external outcomes. Balanced Scorecard is used by the most successful organizations and Destination Greater Victoria will continue to use it as an evaluation framework moving forward.

Destination Greater Victoria is constantly looking to improve its performance management system and for the 2020 Business Plan there are several refinements:

- More stretch in targets where possible and in some instances Destination Greater Victoria has incorporated multi-year BHAG (Big Hairy Audacious Goals) goals staggered over three years. This provides needed robust stretch targets that can be refined each year, while not causing attainability issues that might demotivate some staff.
- Introducing multiple year targets: Where appropriate to drive the highest and best returns, Destination Greater Victoria has included three-year targets. Realistic, achievable targets are set, but in past years targets were in some cases achieved part way through the year. As Destination Greater Victoria continues to refine and improve its business knowledge and processes to drive results, this issue can be resolved by creating multi-year targets.
- Further emphasis on environmental standards: In 2019 Destination Greater Victoria started to measure carbon footprint and offset all flights for its staff as well as customers hosted. In 2020 Destination Greater Victoria intends to go further and will develop a pathway to carbon neutrality by 2021. To demonstrate the importance of this work it is written into Balanced Scorecard targets.

PARTNERSHIP AS CRITICAL DRIVER OF SUCCESS

Destination Greater Victoria works with myriad partners to advance mutual goals of a sustainable, year-round, vibrant visitor economy that serves and benefits Greater Victoria residents. Destination Greater Victoria’s partners are highlighted here.



PREPARING TO DEVELOP THE 2022 – 2026 PLAN

While this document outlines plans for 2020 and year four of the current five-year 2017-2021 Strategic Plan, the CEO, Board and Executive Team will also begin substantive work on the next five-year plan in 2020. Under the MRDT Guidelines, Destination Greater Victoria must have its 2022-2026 plan with required approvals (by hotels, municipalities, and the regional district) submitted to Destination British Columbia by June 30, 2021. In the past, five-year plans have generally been industry plans supported by local governments. The new best practice is to involve residents and gain their input, along with input from industry and governments, to form a holistic plan with broad support. These are often referred to as “Tourism Master Plans.” Given the vital importance of industry, residents and governments aiming for the same goals, Destination Greater Victoria intends to partner with a world-leading consultancy in order to create a robust process to develop the 2022-2026 strategy. This is planned for and resourced in the 2020 budget.

2019 – A REMINDER THAT GROWTH IS NOT TO BE TAKEN FOR GRANTED

The decline in contracted conference business as well as declines in the tour and transient segments produced lower results for Q1 and Q2 2019 compared to 2018. However, it should also be noted there were equivalent or greater declines in the tour and transient segments across Western Canada. Long-term the visitor economy is a growth industry but it is important to understand business is cyclical and operates in a highly-competitive global environment.

MARKET SITUATION ANALYSIS

After six years of consecutive growth, there has been a slight decline in key visitor economy indicators in 2019. Destination Greater Victoria staff have identified in the following contributing factors to the decline:

1. Significant one-time events in 2018 not returning in 2019, including IIHF World Junior Hockey, Jehovah Witness Convention and World Aviation Road Race. It should be noted that Northwest Deuce Days supported business in July 2019.
2. Natural Business Cycles: Global growth is slowing and major economies such as Germany entered technical recession in 2019.
3. Disruption in the global aviation system due to Boeing 737 Max challenges.
4. Global tour operators focusing on other parts of the world, as well as price sensitivity in the market. It is important to note that bankruptcy of Thomas Cook Group and ongoing challenges of Cox & King underpin the structural vulnerability of this segment.
5. Transient (short-term independent) business started the year strongly but declined in June. This is probably tied to eroding consumer confidence.
6. Measured decreases in travel intention. A recent survey of Washington residents' showed that since 2018 there has been a decline in intent to travel generally, including 14% less intent to visit Victoria over the next 12 months. Results for Vancouver and BC were similar. Although likelihood of visiting Victoria remains almost 30% above the 2014 baseline, the trend towards less travel in 2020 is being reported widely in the US.
7. Political disruptions in source markets such as Alberta and China.
8. Increased competition in key source markets.
9. Approaching capacity in key transportation linkages such as BC Ferries Route 1.

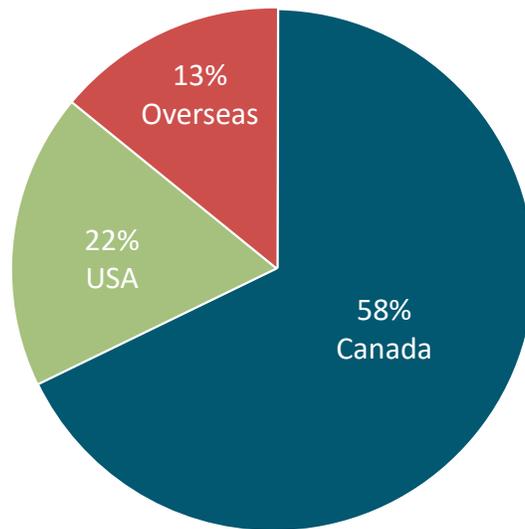
Despite these disruptions, 2019 will likely be the second or third strongest tourism year in Greater Victoria. This is due to consistent investment in source markets and notable strength in meetings and conference business in Q4 2019. This will also translate into business on the books in 2020.

Despite these challenges, Greater Victoria is still in a strong situation compared to many of its competitors. Greater Victoria has strong destination awareness, an improving sales team, and is situated in a wealthy and vibrant part of the world near key short-haul sources markets. Destination Greater Victoria and its partners have the ability to influence visitation with sustained marketing and sales campaigns within these markets.



MARKETS AT A GLANCE

2018 VISITOR ORIGIN*



Top Canadian Provinces

1. British Columbia
2. Alberta
3. Ontario

TOP USA STATES

1. Washington
2. California
3. Oregon

TOP OVERSEAS AREAS

1. Europe
2. Asia/Pacific

2017 MARKET SOURCES**



*Source: Statistics Canada NTS and VTS data 2018.

**Source: Statistics Canada ITS and TSRC data 2017.

REVIEW OF SOURCE MARKETS

A prudent step in business planning is to review the underlying assumptions and drivers of each source market. Using a variety of empirically driven inputs (i.e. market size, transportation access, response to past marketing campaigns and digital effectiveness), as well as qualitative inputs such as competition and support in that market from senior destination marketing organization partners, we have undertaken a comprehensive analysis of potential source markets.

The rankings of our key source markets are:

RANKING KEY SOURCE MARKETS

TIER A MARKETS: ACTIVE INVOLVEMENT

BRITISH COLUMBIA
Vancouver and BC Lower Mainland

WASHINGTON
Seattle and Western Washington

ALBERTA
Calgary

ONTARIO
Toronto

CALIFORNIA
San Francisco

TIER B MARKETS: SECONDARY PRIORITY LIMITED INVOLVEMENT (B2B SALES,EVENTS)

OTHER BRITISH COLUMBIA
Vancouver Island, Okanagan, Kelowna

ALBERTA
Edmonton

QUEBEC
Montreal

CALIFORNIA
Los Angeles

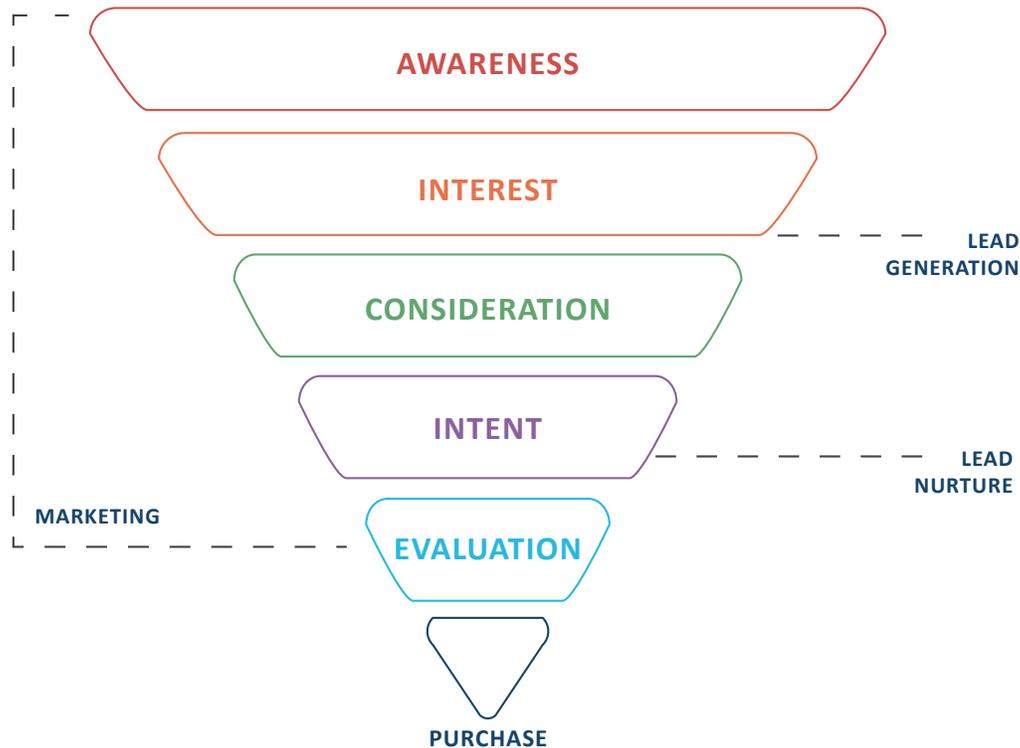
OREGON
Portland

OTHER US
Denver, Dallas

REVIEW OF CREATIVE APPROACH

Transient business across Western Canada declined from June 2019. At this time the management team worked with our creative agency to review Destination Greater Victoria's marketing and creative approach. Through discussion and analysis it was agreed that as a marketing organization Destination Greater Victoria would move slightly higher in the customers "journey to purchase" and focus on inspiration and trip planning in 2019. This will widen the "sales funnel" and provides more opportunity for conversion. Through 2016, 2017 and 2018, Destination Greater Victoria's work was focused on conversion tactics, closing sales and efficiency of the visitor's investment. This is a wise marketing strategy when there is already strong underlying demand. However, in more challenging economic environments the number of potential prospects for a destination needs to increase. In 2020, creative approaches will be more inspirational, focused on competing against other destinations directly as opposed to conversion of those already interested in visiting Greater Victoria.

MARKETING FUNNEL



CONFERENCE BUSINESS OUTLOOK FOR 2020

CWT Meetings and Events 2020 Future Trends Report indicates the industry sector is expected to grow 8% in 2020. Business Events Canada's National Pace Report also indicates a positive trend for 2020 conference bookings. Destination Greater Victoria is forecasting a strong year for conference business, especially citywide conferences.

Examples include:

February 25-29, 2020	Canadian Rheumatology Association Annual Scientific Meeting
April 3-5, 2020	Moving Trans History Forward
May 28-30, 2020	Canadian Brewing Awards
June 5-6, 2020	Canadian Women in Medicine
June 15-18, 2020	Travel and Tourism Research Association Conference
November 3-6, 2020	First Nations Health Managers Association National Conference

VICTORIA CONFERENCE CENTRE: CITYWIDE CONFERENCES BY COMPARISON

Citywide Conferences are defined as having at least 400 delegates and are typically headquartered at the Victoria Conference Centre with accommodation spread across multiple hotels. The number of citywides in Victoria by year are:

2018: 30

2019: 29

2020: 35 (projected) There is also a possibility of three additional bookings for a potential total of 38.

CONFERENCES WITH ROOM COMPONENT

Includes citywides and all smaller conferences that require hotel room blocks.

2018: 63

2019: 66 (plus two additional tentative bookings)

2020: 66 (plus ten additional tentative bookings)

VICTORIA CONFERENCE CENTRE DELEGATE DAYS

2018: 121,430

2019: 113,000 (projected)

2020: 122,000 (projected)

ECONOMIC SECTOR STRATEGY

To align with the priorities of Business Events Canada, Destination Greater Victoria will work in partnership to align sales efforts focused on the federal government's priority economic sectors. In Greater Victoria, economic sector strengths are clean technology and natural resources (ocean and marine). Through integrated marketing campaigns and local expertise, Destination Greater Victoria will leverage its strengths in hosting conferences from these sectors. In September 2020, Destination Greater Victoria will participate at the BEC Signature Innovate Canada Event to showcase the strength of Greater Victoria's Ocean/Marine Sector and connect the organization with qualified international buyers from this sector.

SPORTS TOURISM OUTLOOK FOR 2020

Completing its second year and heading into its third year, the Greater Victoria Sport Tourism Commission (GVSTC) continues to become a highly effective resource for sport tourism in the region. Through collaboration with the sport community and event sponsors, an exciting array of provincial, national and international events will occur in 2020, including the Pan Am Cross Country Championship, the Canadian Cyclo-Cross Championship as well as bids for high-visibility golf and basketball events. The GVSTC has been the primary driver in Greater Victoria's bid for the 2022 or 2024 Invictus Games. Overall, Destination Greater Victoria expects the landscape for sport tourism to continue to improve as the GVSTC refines its partnership and bidding expertise. In its short existence, the GVSTC has developed deep partnerships with entities such as the University of Victoria to successfully bid on and win multiple events.

It should be noted that the Greater Victoria area has lost some national training facilities in the past year, such as rowing and swimming. While it is not the GVSTC's mandate to maintain or bid for these facilities, we do recognize that these losses represent setbacks in the local sports landscape.

The Greater Victoria Sports Tourism Commission is a division of Destination Greater Victoria but operates with a significant degree of autonomy to ensure it represents the interests of both the sports and tourism industries, as well as mutual government partners. The GVSTC has developed a robust base of 60 members, from which an advisory committee of 15 is drawn.

LEISURE BUSINESS OUTLOOK FOR 2020

According to the Conference Board of Canada, travel to the top metropolitan regions in 2019 and 2020 was expected to increase between 1.6% to 3.3% over 2017 numbers. The Conference Board of Canada will release updated projections for 2020 in January 2020. Overall leisure travel growth is expected to be muted with only modest growth expected.

Upside Potential:

- Ongoing interest in travel worldwide.
- Strong employment numbers in North America.
- Canada, BC and Victoria maintain positive brand identities.
- Possible return to full aviation capacity due to the 737 Max issues being resolved in 2020
- More balanced and predictable travel trade results in 2020.

Downside Risk:

- Global economic environment continues to move towards recession.
- A variety of pressures on household incomes.
- Ongoing tensions between Canada and China.

When all factors are considered, it is evident that leisure travel has grown considerably between 2013-2018. Growth in the medium-term will be more muted with a possible decline if the overall economy moves into recession.

While Destination Greater Victoria will compete vigorously for leisure business – both in travel trade and transient short-haul business – it will be prudent and diligent in its efforts to build a foundation of meetings and group business. This is to ensure the destination is not overly reliant on leisure business at any time during the year.



KEY INITIATIVES FOR 2020

In addition to the foundational initiatives that are outlined in the business plan, each business year has a series of key initiatives which will help drive success for members, industry and Destination Greater Victoria’s government partners. The following section outlines these priorities and provides insight about how they achieve Destination Greater Victoria’s strategic priorities.

EXPERIENCES STRATEGY

Partners such as Attractions Victoria, hotels and spas, culinary and others could be invited to participate and partner in an initiative which in time may become a foundational competitive advantage. These include bespoke itineraries to extend length of stay and maximizing time-of-day and time-of-week strategies. For the sake of the 2020 Business Plan the key will be to scope a project in collaboration with Destination Greater Victoria’s partners, building a robust business case and plan, as well as a full risk assessment.



MAJOR CONFERENCES AND EVENTS

The Major Conferences and Events program is designed for Greater Victoria to benefit from ongoing programs and platforms that drive meaningful, predictable and ongoing business with a focus on the off-peak season. These major conferences and events are owned or partially owned by Destination Greater Victoria to ensure they are stable, community-oriented and permanently based in Greater Victoria.

For the past two years, the Major Conferences and Events program has operated two platforms:

- IMPACT Sustainable Travel and Tourism Conference
- Capital City Comic Con

In addition, it has supported events such as Northwest Deuce Days and in 2020 it will turn its attention to executing two additional platforms.

- 2021 55+ BC Games. The event takes place in September 2021.
- Global Garden Tourism Conference. The inaugural event will occur in October 2021.

BUSINESS EVENTS VICTORIA CUSTOMER ADVISORY BOARD

2020 will mark the second year that Destination Greater Victoria's Business Events unit will work with its Customer Advisory Board in order to improve the competitiveness of Greater Victoria's meetings offerings.

The Customer Advisory Board (CAB) was created to act as a sounding board and advisory network for Destination Greater Victoria's Business Events business unit. The goal is to further develop Business Events Victoria's (BEV) strategic plans and improve its competitiveness.

The CAB's main objectives are to:

- Help orient BEV's strategies and actions and assess them against the competition.
- Act as council to BEV and give feedback on marketing initiatives.
- Act as ambassadors for Destination Greater Victoria within the business events market globally.
- Inform BEV of any market intelligence and developing trends.

Twelve (12) members were recruited; five Canadian associations, two US/International Associations, one US corporate, two Canadian third party and two US/International third party planners.

CAB meets in-person once a year over two days and also schedules quarterly conference calls to discuss and share updates to strategic plans and discuss market intelligence. Throughout the year, CAB members are connected and engaged with BEV during in-market events.

FURTHERING REGIONAL PARTNERSHIPS

Canadian Experiences Fund – Agritourism Initiative

The Canadian Experiences Fund (CEF) supports communities across Canada as they create and enhance tourism products, facilities and experiences. Delivered through Canada's regional development agencies, this two-year fund helps Canada's tourism sector innovate and grow by providing targeted investments based on regional priorities:

- Winter and shoulder-season
- Indigenous
- Inclusiveness, especially for the LGBTQ2 community
- Rural and remote communities
- Farm-to-table, also known as culinary tourism

Eligible CEF proponents could be non-profits, for-profit businesses, local governments, local development agencies, or other organizations provided they are in line with the relevant regional development agency's contribution programs and related terms and conditions.

Through this program, Destination Greater Victoria applied for and successfully secured funding to celebrate and support an agritourism initiative which will link producers in Saanich and the Saanich Peninsula through to the mainstream visitor economy. Destination Greater Victoria will work with partners to initiate two years of marketing campaigns to build upon the work of the Capital Food and Agriculture Initiative Roundtable (CRFAIR) Flavour Trail program and expand it across the Saanich Peninsula, as well as providing product knowledge training for producers and operators interested in preparing their operation for the highly-lucrative meetings, conference and incentive market.

Capital Region Food and Agriculture Initiative Roundtable (CRFAIR) Agri-tourism Strategy



In 2018 Destination Greater Victoria and CRFAIR formed a partnership to promote CRFAIR's Flavour Trails program. Flavour Trails is an annual celebration in August of food and wine on the Saanich Peninsula. Destination Greater Victoria is a sponsor of the event and it is a great way to promote our members in the area. Earlier this year Destination Greater Victoria and CRFAIR applied to Western Economic Diversification Canada's Canadian Experiences Fund to further develop agri-tourism on the Saanich Peninsula. The application was successful, and we were granted up to \$220,000 to develop and promote agri-tourism on the Saanich Peninsula. The Saanich Peninsula has incredible potential as a regional tourism destination and its restaurants, wineries and natural beauty make it a short and attractive daytrip for visitors staying in the downtown core. We look forward to building on the success of Flavour Trails and working in close partnership with CRFAIR in 2020.

Vancouver Island Trade Consortia

In travel and tourism, a consortium refers to an organization or network made up of independent travel agents and agencies. Consortia negotiate with hotels, resorts, cruise lines, and other suppliers on behalf of their agent members and often work under a common brand platform for their mutual benefit. Consortia can be a series of independent agents or wholly owned. Examples include AAA/CAA, Virtuoso and Signature Travel Network. It is important to work with travel agency consortia as they are close to the customer and have unified marketing and sales platforms. Destination Greater Victoria has had some involvement with consortia over the last number of years and has recently worked in collaboration with Tourism Vancouver Island and other DMOs to create a new program to enhance combined efforts in order to be more impactful with consortia partners. Destination Greater Victoria looks forward to working constructively on this new partnership.

Marketing Partnership with Tourism Cowichan



The Cowichan Valley is another emerging culinary destination on southern Vancouver Island. Tourism Cowichan has done a tremendous job building and promoting tourism in the region. However, Tourism Cowichan also has a vision to build on their existing strong brand. They released a request for proposals (RFP) for a consultant or organization to create more marketing and promotional materials and events, and ensure the Cowichan Valley is top of mind for travelers to Vancouver Island. Destination Greater Victoria has had members in the Cowichan Valley for many years and bid on the RFP. In July 2019 Destination Greater Victoria was announced as the successful proponent. Tourism Cowichan can now utilize Destination Greater Victoria's in-house marketing expertise and human resources while Destination Greater Victoria can further support our membership in the Cowichan Valley and better promote regional tourism to the area. This business focus on the Cowichan Valley will grow and mature in 2020.



SUSTAINABILITY COMMITTEE

At the request of the Hotel Association of Greater Victoria, Destination Greater Victoria will set up a sustainability committee with the purpose of improving the overall sustainable approach to Greater Victoria's visitor economy. Many businesses already have sustainable practices. Destination Greater Victoria will work collaboratively to research best practices, codify expectations, and apply to a globally recognized accreditation body that assesses and benchmarks the industry. Once this plan is approved, it is Destination Greater Victoria's intention to form a committee with members from the Hotel Association of Greater Victoria, Attractions Victoria, the Victoria Chapter of the Hotel and Restaurants Association, the Greater Victoria Harbour Authority, Victoria International Airport Authority and other stakeholders.

REVIEW OF MEMBERSHIP CATEGORIES AND STANDARDS

Like most tourism boards and convention & visitors bureaus across North America, Destination Greater Victoria is a membership-based association. Membership requirements are not onerous for these organizations and usually include a local business license. Destination Greater Victoria also requires a Goods and Services Tax number. These measures are designed to ensure members are legitimate businesses.

However, with the advent of the sharing economy and more scrutiny on the industry, Destination Greater Victoria through its Finance and Membership Committee has begun work for membership requirements to be more rigorous, with a medium-term goal of ensuring members are following appropriate regulations from all levels of government and understand the expectations of working with the official tourism board.

Some measures taken to date include:

- Have all new members acknowledge and countersign the Members Code of Conduct.
- Engaging an expert consultant to work with Destination Greater Victoria's management team to identify membership categories where further scrutiny around regulations and risk management is required.

Destination Greater Victoria expects this work to be completed in 2020, followed by Board and Committee review and approval.



MAJOR INDUSTRY EVENTS FOR 2020

A significant emphasis of achieving our collective goals is to attract major visitor economy related business-to-business events and conferences. These perform double functions by providing immediate economic impact towards our goals of the current business year, and also providing business-to-business platforms to raise the profile of tourism related business opportunities or showcase our innovation and ability to do business in our sector. Working in partnership with the Victoria Hotel Destination Marketing Association, Destination Greater Victoria has bid on and won the following major industry events for Greater Victoria for 2020:

GOMEDIA CANADA

GoMedia Canada Marketplace is the conference for Canadian travel operators to exchange stories and ideas with international media. This event is held annually in Canada with a different city hosting each year. Victoria will host the event September 9 – 13, 2020. 300 international media, influencers and travel industry leaders will attend the conference.

TOURISM AND TRAVEL RESEARCH ASSOCIATION (TTRA) INTERNATIONAL'S 51ST CONFERENCE

As the travel and tourism ecosystem evolves, professionals across the industry and around the world want quality research to make informed decisions. The Travel and Tourism Research Association (TTRA) provides this information. For more than 45 years, TTRA has been the industry's leader for evidence-based, global data and analysis. TTRA unites the travel and tourism research community – university academics, professional practitioners, and users of research – so they can network and collaborate in person and across borders. Victoria will host the 51st TTRA Conference as they celebrate their 50th anniversary. The event will be larger than most years with many retired members joining the celebration. It is expected there will be 250 to 300 delegates attending the conference from June 16 – 18, 2020.

CANSPEP

The Canadian Society of Professional Event Planners (CanSPEP) is a dynamic, diverse and innovative society of independent event professionals and a leading national voice in the event industry. It is the only association in Canada that offers an exclusive membership to independent event planner entrepreneurs. Formed in 1996, the association provides forums in which members exchange ideas, develop skills through educational programs and create public awareness around the profession of event planning. While membership is only open to event planners, the association offers industry suppliers an opportunity to showcase their products and services to Destination Greater Victoria members through various advertising and sponsorship opportunities. It is expected there will be over 100 meeting planners attending the conference from April 23 – 25, 2020.



BUSINESS ACTIVITIES

CORPORATE COMMUNICATIONS AND DESTINATION MANAGEMENT

STRATEGY

Develop and execute on public communications and stakeholder relations that align with strategic direction of Destination Greater Victoria. This strategy is informed by the Destination Greater Victoria Strategic Plan 2017-21, as well as considerations specific to the issue or goal of public commentary. Corporate communications occur through local media and social media to highlight the positive contribution of tourism in the Greater Victoria economy, as well as showing support for Destination Greater Victoria members as needed.

The focus of destination management is to promote the Greater Victoria visitor economy as beneficial to the wider community as well as a healthy resident-visitor interface. Destination Greater Victoria operates in an area of public scrutiny. It must continually demonstrate to local policymakers, stakeholders and the public at large its value marketing the destination.

TACTICS

- Tell tourism’s story throughout the year and specifically during Tourism Week.
- Reinforce success and key messages in local media and social media.
- Highlight common goals and priorities Destination Greater Victoria has with other local stakeholders.
- Communicate research and trends in Greater Victoria’s tourism industry and how Destination Greater Victoria is capitalizing and adapting to changes in the local tourism economy.

PARTNERSHIPS

City of Victoria, District of Saanich, BC Ferries, Victoria Airport Authority, Greater Victoria Chamber of Commerce, Downtown Victoria Business Association, Greater Victoria Harbour Authority, Tourism Industry Association of BC, Destinations International.



SOURCES OF FUNDING

- MRDT, membership revenue

TIMEFRAME

- Year-round

PERFORMANCE

All performance measures in the Balanced Scorecard Framework. These include:

- Number of local media placements
- Number of political briefings/opportunities

BUSINESS ACTIVITIES

CONSUMER MARKETING AND TRAVEL MEDIA

STRATEGY

Drive incremental yield to the region, focusing on measurable room night increases in the shoulder seasons and off-peak season and delivering value to our stakeholders. Collectively, the Marketing and Communications team focuses on six strategic priorities:

1. Promote Greater Victoria as a compelling, year-round destination.
2. Increase length-of-stay to boost destination revenues.
3. Drive strong call-to-action (CTA) and promote measurable conversion.
4. Leverage partnerships and co-investment opportunities with Destination BC, Destination Canada and other entities that align with Destination Greater Victoria's objectives.
5. Drive measurable visitation to Destination Greater Victoria-owned conferences and events.
6. Enhance the promotion of the Greater Victoria area to drive regional disbursement.

MARKETING BUSINESS TO CONSUMER (B2C): ADVERTISING, B2C PROMOTION ACTIVITY AND CONTENT MARKETING

STRATEGY

Following the 2018 destination brand strategy work, 2019 marketing efforts used new brand assets and brand communications. The refreshed look, tone-of-voice and brand story has brought consistency to our marketing messaging and will ensure increased destination sentiment index in 2020. However, business trends demonstrate that as we prepare campaigns for 2020, we will need to focus again on generating more awareness and interest than we did in 2019.

TACTICS

In 2019, we shifted to deliver an always-on approach, with increased activity in the shoulder seasons and off-season. The need to increase awareness and interest in future years will mean consideration of more disruptive tactics. Marketing will continue through peak periods with efforts such as social media; however, paid marketing campaigns will be activated in the shoulder seasons and off-peak season. Our marketing activity will leverage in-house creative production, using the very best and most current assets. The marketing tactics are aligned with the organization's five-year strategic plan and its 2020 enterprise Balanced Scorecard.

1. Grow yield
2. Address seasonality
3. Grow engagement and visits to Destination Greater Victoria website

Driving awareness of the destination on a year-round basis, marketing efforts will showcase destination experiences and products that result in bookings. The efforts will include always-on campaign drivers, with dedicated campaign themes to address the shoulder seasons and off-peak season.

Data and campaign information will be used to analyze consumer insights, ensuring budgets are effectively allocated. Digital channels will collect this information. Where budget allows, integrated traditional media channels will also be used.

Each campaign will drive a strong call to action. We will invest in attribution-modeling, enabling us to measure hotel revenues and room nights for the destination. We will continue to work with member partners to ensure content, offers and value-ads are current and consumer-centric.



GEO-MARKETS

Our key Tier A geographical regions driving direct leisure visitation continue to be our primary markets: Seattle, Vancouver and Calgary; and secondary markets: San Francisco, Toronto and Edmonton.

ACTIVATION

As we develop more research-driven insights, the geographic focus will adjust to more consumer-centric targeting. The goal is for our campaigns to drive awareness and maximize return-on-investment (ROI) for the region.

Destination Greater Victoria will ensure our destination is top-of-mind for consumers with an intent to travel who reside near our destination (“short haul”). Seasonal and campaign-specific themes run throughout our marketing calendar, especially during need-period business. We will also promote destination strengths through our brand strategy, such as our charm, gardens, mild climate, relaxed pace and uniqueness.

COLLABORATIVE APPROACH

Destination Greater Victoria will work in partnership with our stakeholders and financial supporters, providing platforms to drive measurable visitation in our accommodations sector. In addition, we will work with Western Economic Diversification Canada, CRFair, Destination BC and Destination Canada, leveraging budgets and platforms when it aligns with Destination Greater Victoria’s objectives.

TRAVEL MEDIA: IDENTIFYING AND PITCHING MEDIA OUTLETS, JOURNALISTS AND KEY INFLUENCERS

STRATEGY

With the continuing growth across key social media channels that inspire travel, the media team now includes a Manager of Influencer and Media Relations, supported by a Specialist, Media Relations. We will continue to provide support to traditional media and outlets that increase destination awareness and consumer intent to visit.

TACTICS

The efforts of the travel media team will deliver on three areas in 2020:

1. Earned media
2. Paid media/influencer
3. GoMedia Canada

With the significant shift in the travel media landscape and growth of the social influencer space, we will dedicate budget to paid influencer visits to those influencers that can demonstrate ROI for the destination.

In the traditional space of earned media, we will leverage the opportunities provided via Destination BC and Destination Canada in international markets (see Geo-Markets) and will work on stand-alone programs in regional markets.

We will be proactive in pitching interesting and unique Greater Victoria stories to compel media to visit or leverage existing content for the destination.

2020 IN MARKET ACTIVITIES: TRAVEL MEDIA

MONTH	DATES	ACTIVITIES	LOCATIONS
JAN	22-24	International Media Marketplace	New York City
APR		Media Mission	San Francisco
		Media Mission	Los Angeles
MAY		Media Mission	Toronto
		Media Mission	Vancouver
		Media Mission	Seattle
SEPT	9-13	GoMedia Marketplace	Victoria

GOMEDIA

GoMedia is Destination Canada's signature media event that connects international media with Canadian tourism organizations to drive stories that inspire travel. GoMedia 2020 will be held in Victoria, B.C. in 2020 from September 9-13. GoMedia Canada consists of face-to-face meetings, thought-provoking networking events, and pre and post event tours across the host region, shining a media spotlight on our destination with anticipated lift in coverage in 2020-21. Greater Victoria will host approximately 200 international media and 350 delegates for the event.



BUSINESS ACTIVITIES

TRAVEL TRADE B2B: PARTNERSHIP PROGRAM, JOINT MARKETING AND SUPPORT

Travel Trade is the sector of the visitor economy where people and companies resell travel products that they have bought and/or reserved from other parties. It includes tour operators, wholesalers and travel agents. It is the distribution network for travel composed of these types of business entities.

Destination Greater Victoria supports Travel Trade business-to-business (B2B) relationships through partnership program support, joint marketing agreements and market support.

STRATEGY

Maintain existing travel trade/B2B relationships and at the same time, leverage these relationships to grow incremental, shoulder-season business from key international markets. There will be collaboration with tour operator partners to develop joint marketing agreements that provide a strong ROI and educate local receptive tour operators (RTOs) to sustain measurable growth year-over-year.

The travel trade segment is complex; each market varies in terms of its requirements, investment and relationships. Destination Greater Victoria is aligned with Destination B.C. and, to a lesser degree, Destination Canada in long haul/ international markets - ensuring support in markets where Destination Greater Victoria has allocated smaller budgets. Our objectives focus on positioning the Greater Victoria region as an overnight destination for international consumers via business-to-business (B2B) channels, building new and interesting itineraries, growing market share from competitive destinations such as Vancouver and Richmond (based on availability) and showcasing the diverse network of tourism experiences and accommodations that resonate with our international clientele.

TACTICS

Through Destination Greater Victoria's core budget, Travel Trade will identify partners, including wholesale and retail partners with an ability to demonstrate year-over-year sales and room night growth. Efforts related to tour operators and RTOs will increase in 2020, with a greater emphasis on long-term partnerships. In addition to FAM support, Destination Greater Victoria will target at least one tour operator or RTO per key market to develop joint marketing-agreements that deliver incremental growth for the destination during the shoulder seasons and off-season. The joint marketing efforts will leverage existing direct relationships or build on in-market efforts of Destination B.C. or Destination Canada. Each program will have set objectives agreed by both parties and provide a minimum of 5:1 ROI.

Travel Trade will collaborate with DMOs on Vancouver Island and develop pan Vancouver Island consortia programs. The consortia programs will target short haul markets, create new tour programs, increase the total length of stay on Vancouver Island and build Greater Victoria as the gateway city to Vancouver Island.

Collaboration will continue with Destination BC, other DMOs as well as our members and the City of Victoria and build the awareness of BC and Greater Victoria as a year-round destination in the Chinese market. Through online and offline marketing and sales activities in China, Destination Greater Victoria will emphasize shoulder season and off-peak season overnight stays and attraction visitation in the Greater Victoria region.

Destination Greater Victoria will develop an East Coast sales mission led by the travel trade manager responsible for the market, with a combination of in-house training opportunities and a hosted Destination Greater Victoria event. Destination Greater Victoria will leverage Destination Canada marketplaces in China and develop a China sales mission led by the travel trade manager responsible for the market. The China sales mission will focus on key accounts and in-house training in a tier 1 city. Destination Greater Victoria will also leverage Destination Canada's marketplace in Mexico and develop a partnership support program.

Hosting key clients in-person from targeted international markets is a major tactic to showcase our destination. Destination Greater Victoria will work closely with travel trade partners as well as with Destination B.C. and Destination Canada to identify specific opportunities that provide year-round revenue for the destination. Destination Greater Victoria will continue efforts to be more strategic in selecting FAM groups and require a deeper commitment to delivering ROI.

GEO-MARKETS

Based on research from Destination BC and to a lesser degree, Destination Canada, we will provide market support across the following international markets:

1. USA (focus on WA, CA and TX as well as national) (Consortia)
2. Canada (Consortia)
3. China
4. Australia
5. Mexico
6. Japan
7. South Korea

2020 IN MARKET ACTIVITIES: TRAVEL TRADE B2B

MONTH	DATES	ACTIVITIES	LOCATIONS
FEB-MAR		RTO sales calls	Vancouver
APR		Focus Canada Mexico	Mexico
MAY	5-8	RVC	Quebec City
JUL		RTO sales calls	Richmond
SEPT		Canada/US Sales Mission	TBD
OCT		Showcase Canada China	China
		China Sales Mission	China
NOV		Canada West Marketplace	TBD

2020 Performance Measures



25
Incremental Overnight
Tour Programs



200
New Business Leads for
Members – Leisure



8:1
Travel Trade Co-op
Programs ROI

ACTIVATIONS

In addition to working in-market, a continued effort will be made to build on relationships with local, Canadian based RTOs that provide insight and have an ability to deliver incremental overnight business into Greater Victoria. Destination Greater Victoria has built a year-long calendar of trade activities that focus on driving business in shoulder seasons and off-season. The goal is to showcase Greater Victoria as a competitive destination to Vancouver and Richmond, and as a complimentary itinerary add-on from Seattle that have existing itineraries in Washington.

COLLABORATIVE APPROACH TO BUILDING LONG-TERM CAPACITY

Destination Greater Victoria will work in partnership with its members, providing platforms to drive measurable room night and experience revenues via travel trade and will work closely with Destination B.C. and Destination Canada, leveraging their activities and in-market opportunities that align with Destination Greater Victoria's own corporate objectives. Partnership activity will be developed with the GVHA and Victoria International Airport to ensure Greater Victoria's role as a gateway.

STRATEGY

Market and promote Greater Victoria as a meetings destination, generate lead opportunities and convert these opportunities to conference bookings with hotel room nights. BEV's focus is to book meetings that create economic growth in the destination and opportunity for Destination Greater Victoria members, and to drive group room nights for hotels during the shoulder seasons and off-peak season.

TACTICS

In-Market Sales Activities

- In-market general sales agents (GSAs) soliciting leads and client interaction through in-market sales calls, meetings, and attendance at local industry events.
- Membership and board involvement with key industry associations – Meetings Professionals International (MPI), Professional Convention Management Association (PCMA), Canadian Society of Association Executives (CSAE), Meetings Mean Business (MMB).
- Increase the number of Destination Meetings Managers from two to three in order to generate more leads in-market.

Tradeshows

- Presence and participation at industry tradeshows and events in Canada and the U.S.
- Business Events Victoria works with hotel partners to host destination booth at major industry tradeshows (Canadian Meetings & Events Expo, CSAE, Tête-à-Tête) that promotes the destination and increases meetings leads for the destination.

Client Events

- GM missions with general managers and sales managers of partner conference hotels to host clients in key markets – Toronto, Mississauga, Ottawa, Montreal, San Francisco, Seattle

Invest in opportunities to host and partner in conferences to showcase the destination

- Hosting CanSPEP (Canadian Association of Professional Event Planners) Annual Conference to bring key group of meeting planners to Greater Victoria to experience our Destination.
- Partner with SITE (Society of Incentive Travel Executives) to host planners to Victoria for a post-conference FAM
- Meetings Today familiarization (FAM) group focused on bringing Incentive planners to the Destination

Familiarization Tours (FAM) and Site Visits

- Host clients for destination FAM experiences to visit the Destination, venues, activities.
- Collaborate with hotel partners, off-site venues, and attraction partners to host site visits for clients with business leads.

Economic Sector Strategy

- Partner and align with Business Events Canada's (BEC) Economic Sector Strategy.
- Marketing opportunities to highlight Victoria's sector strengths – natural resources (ocean/marine) and clean tech.
- Showcase at BEC's Signature Event for the Economic Sector Strategy – Innovate Canada Conference to highlight ocean/marine Sector

Partnerships

- Destination Greater Victoria partners with HelmsBriscoe at a “Valued Partnership Level” to enhance its profile and to participate in their partner conferences.
- Cities in Sync Partnership with Tourism Saskatoon and Destination St. John’s to leverage partnership of three destinations to win Conference bids.

Customer Advisory Board

- Quarterly meetings and engagement with BEV’s Customer Advisory Board to further develop the Meetings Program in our destination, gaining insight on best practices and strategies to keep us competitive in the meetings market.

Marketing

- Creation of Business Events Victoria Meeting Planner Guide to highlight the services provided to meeting planners.
- Marketing Incentive Program to drive room nights to hotels
- Creation and updating of marketing collateral to promote meetings
- Economic Sector Programs with direct marketing campaigns, video feature, sector publications.
- Local Host Program to highlight opportunities for locals to bring conferences to the destination.
- Cities in Sync marketing initiatives to leverage opportunities through joint marketing activities and activation at tradeshow.

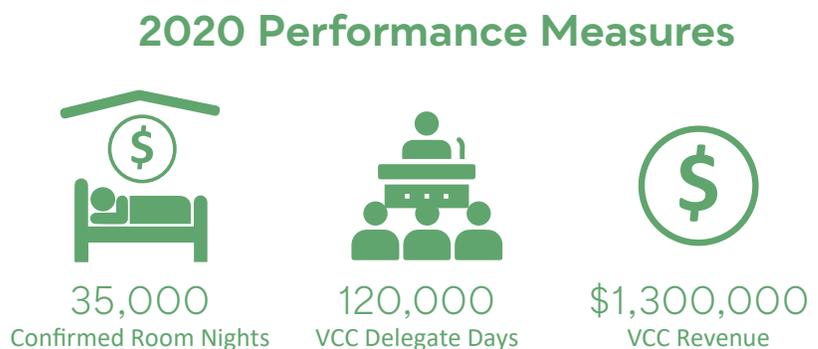
GEO-MARKETS

All of Canada, with a focus on:

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

All of U.S. with focus on:

- WA – Seattle
- OR – Portland
- CA – San Francisco
- DC – Washington



EVALUATION

- Number of RFPs
- Confirmed room nights
- Victoria Conference Centre delegate days
- Victoria Conference Centre revenue

2020 IN MARKET ACTIVITIES: BUSINESS EVENTS VICTORIA

MONTH	DATES	ACTIVITIES	LOCATIONS
JANUARY	5-8	PCMA Convening Leaders	San Francisco
	12-15	BEV Customer Advisory Board	Victoria
	24-27	SITE Global Summit	Vancouver
	27-28	Destination Direct Canada Hosted Buyer Program	Ottawa
	29	Tete-a-Tete Tradeshow with Hotel Partners	
FEBRUARY			
MARCH	5	MPI Gala Awards	Toronto
		GM Mission – Mississauga/Toronto (Hotel Partners: TBD)	Mississauga/Toronto
		GM Mission – Ottawa (Hotel Partners: TBD)	Ottawa
		GM Mission – Montreal (Hotel Partners: TBD)	Montreal
APRIL	2 - 4	MPI The Event	Toronto
		CONNECT California Marketplace Event	California
	13	GMID BC	Vancouver
		BEC Seattle - Showcase Canada	Seattle/Portland
		Venue Series	Vancouver
	25-27	CanSPEP Annual Conference	Victoria
MAY		Calgary Client Event (Hotel Partners: TBD)	Calgary
		CSAE BC Luncheon	Vancouver
		Cities in Sync Spring Sales Mission & Client Events	Ottawa
		HelmsBriscoe Annual Business Conference	Las Vegas
	28	Meeting Encore 30th Anniversary Event	Toronto
JUNE	28 - July 1	PCMA Educon	Montreal
		CSAE O/G Golf Tournament	Ottawa
		MPI Celebration of Excellence Gala	Vancouver
JULY	23-27	Incentive Canada	Halifax
		CSAE Trillium Summer Summit	TBD
AUGUST	8-11	ASAE Conference (Hotel Partners: TBD)	Las Vegas
	18-19	CMEE - Canadian Meeting & Events Expo (Hotel Partners: TBD)	Toronto
		CONNECT Association Marketplace Event	TBD
SEPTEMBER		CSAE O/G September Kick Off	Ottawa
		BEV Fall FAM	Victoria
	1-3	Innovate Canada	St. John's
OCTOBER		GM Mission – California (Hotel Partners: TBD)	San Francisco
NOVEMBER	4-6	CSAE National Conference (Hotel Partners: TBD)	Halifax
	22-24	PCMA CIC Conference	Edmonton
		GM Mission – Seattle (Hotel Partners: TBD)	Seattle
		CONNECT Pacific Northwest Marketplace Show	Seattle
DECEMBER		CSAE Holiday Dinner	Ottawa
		MPI Holiday Event - BC	Vancouver
		Cities in Sync Holiday Sales Mission & Client Events	Toronto
		MPI Charity Auction Dinner	Ottawa

BUSINESS ACTIVITIES

MAJOR EVENTS AND CONFERENCES

MAJOR EVENTS

VICTORIA

& CONFERENCES

STRATEGY

Continued focus is building successful major events and conferences that will drive consistent room nights, with a focus on the shoulder seasons and off-peak season.

TACTICS

Examples of major events Destination Greater Victoria will execute in 2020 and beyond include:

- Continued growth of January's annual IMPACT Sustainability Travel & Tourism Conference (IMPACT). The attendance in 2019 saw a growth of 59% year-over-year (YOY) to 270 delegates. The event created 350 room nights, which was a 230% increase over the prior year. We are currently forecasting a sold-out conference for 2020 with over 350 delegates and more than 400 room nights, as well as continued growth and international exposure.
- Continued growth of January's annual Dine Around and Stay in Town. The 2019 event achieved a sold-out gala event with over 700 attendees. The event created 104 room nights. As of November 2019, Destination Greater Victoria forecasts a sold-out event in 2020, with more focus on out of town advertising to increase overnight stays.
- Continued growth of Capital City Comic Con. Held in March each year, there were 9,348 attendees in 2019 - an increase of 25% YOY. The event created over 3,282 confirmed hotel room nights based on our survey results. The forecast for 2020 is for over 10,000 attendees and an increase in rooms nights. The venue could be expanded in years four and five to increase maximum capacity on peak days.
- Project management and logistical support for events such as the 55+ BC Games, which were awarded to Greater Victoria following a bid by the Greater Victoria's Sports Tourism Commission. The event will be held in 2021.
- After a board-approved motion the Major Events and Conferences team will start the preliminary development and planning for a biennial global garden and culinary conference in Greater Victoria to be held every other year in the month of October, with a focus on culinary tourism. A global garden tourism conference and potential festival is intended to be held immediately after Thanksgiving, starting in October 2021. This would be themed on the former global garden tourism conference which was based in Metz, France but has not operated since 2014.

PARTNERSHIPS

Major Events and Conferences will rely on the support of the Hotel Association of Greater Victoria and Destination Greater Victoria's members. Each platform/event will consist of partners/stakeholders with specific knowledge and reach for the targeted attendees. Specific examples are as follows:



Dine Around and Stay in Town Partner:

BC Restaurant and Food Services Association (BCRFA)

IMPACT Partners:

- Synergy Enterprises
- Beattie Tartan
- Starrboard Enterprises Inc.

Capital City Comic Con:

- National Toy Museum of Canada
- Downtown Victoria Business Association

SOURCE OF FUNDING RESOURCES

All events in the start-up phase required the financial support of Destination Greater Victoria and its partners. The goal was that each event will become independently viable in two to three years, and self-supported through delegate registration, tickets sales, exhibitor space, sponsorship and advertising.

Both IMPACT and Capital City Comic Con will have paid back all hard costs carried by Destination Greater Victoria by the end of their second year, as well as a portion of the initial investments. Destination Greater Victoria received \$5,625 from IMPACT and \$10,000 from Capital City Comic Con in payments for start-up investments and are forecasting the same - if not more - in 2020.

With two years of experience, Major Events and Conference are submitting funding applications for future events. The 2020 Capital City Comic Con was successful in receiving \$30,000 in funding through the Tourism Events Program, which is managed by Destination BC and the Ministry of Tourism, Arts & Culture.

TIMEFRAME

Annual events will be held in consistent and specific months, with a focus on January to April and November to December. These are shoulder season and off-peak season months for the Greater Victoria visitor economy. Holding major events in these months provides an opportunity for growth. Although the events will be held in specific months, execution, promotion and project management is required year-round.

EVALUATION

Gross revenue, Destination Greater Victoria's impact calculator, customer relationship management (CRM) program analytics, post surveys and reviews will be used to evaluate major events.

PERFORMANCE MEASURES

All performance measures tie back to the Balanced Scorecard framework.

Examples would include:

- Increased room nights +25%
- Increased delegates/attendees +25%
- Revenue neutral to +10%

2020 Performance Measures



3,500
Room Nights



10,000
Attendees



\$15,000
Portfolio Net Revenue



BUSINESS ACTIVITIES

VISITOR SERVICES

STRATEGY

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

- Ticket Centre Sales for our Members
- Grow rate and volume
- Address seasonality

RATIONALE

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



TACTICS

- Professional and continuous sales training for all front-line staff to ensure product is understood, sales targets and customer service initiatives are adhered to and a strong growth mentality is fostered
- Collaboration with members and potential partners
- Leverage technologies to enhance digital offerings to visitors
- Increase relevance of Visitor Centre to augment foot traffic
- Enhancement of the volunteer program and elevating their presence to see a growth in volunteer numbers, hours and impact

PARTNERSHIPS

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

SOURCES OF FUNDING

Destination Greater Victoria receives grants for Visitor Services from the City of Victoria and District of Saanich. These grants are augmented by membership revenues, incremental advertising opportunities and commissions on ticket sales from member products and services.

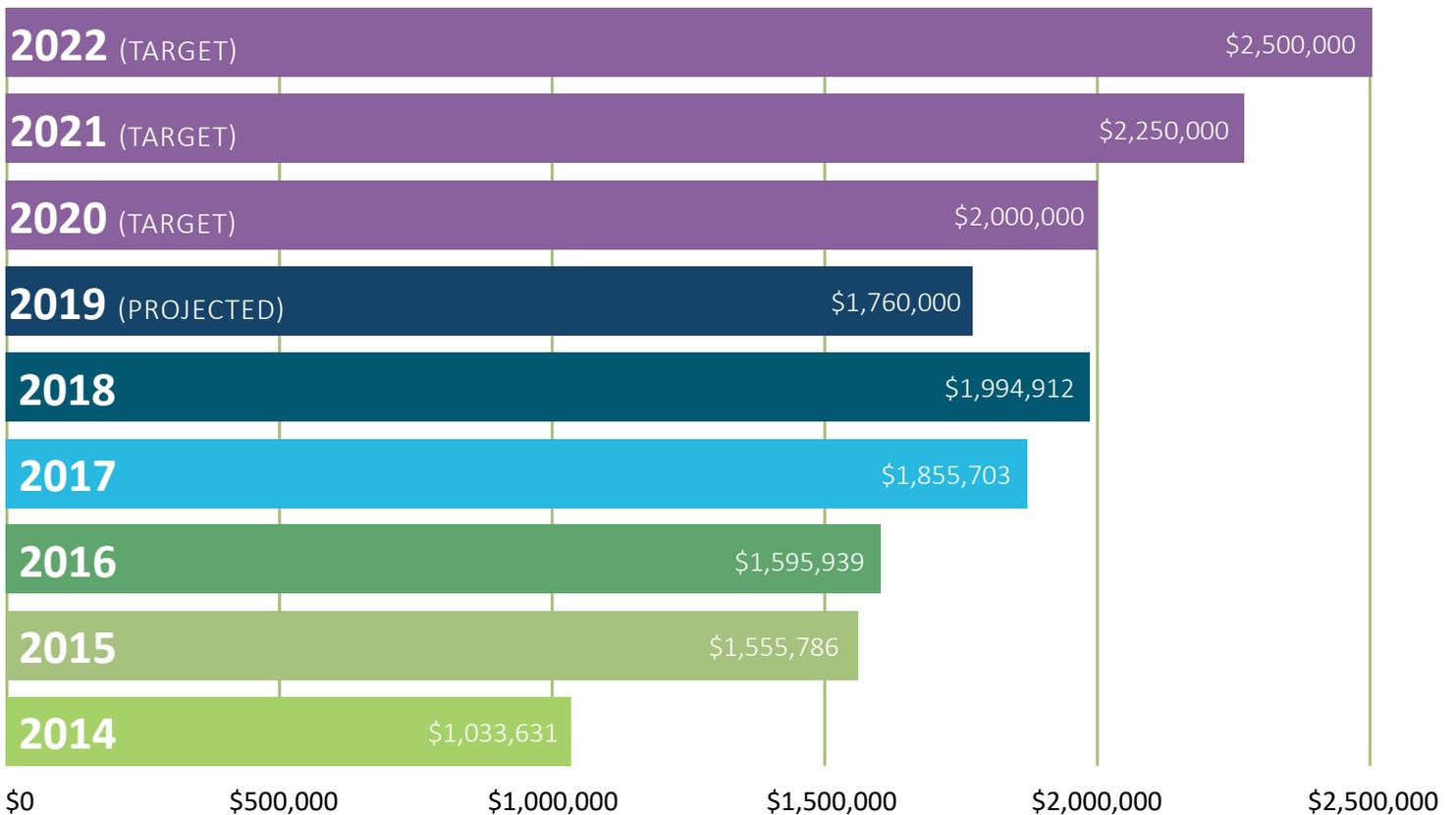
TIMEFRAME

Visitor Services is predominately a year-round business line, but is closed on Christmas Day, Boxing Day and New Year's Day, as well as for all-staff training days throughout the year.

EVALUATION

Gross ticket revenue, POS analytics including fair distribution of member products, foot traffic counter, average booking value and volunteer hours.

2020 Performance Measures



VISITOR SERVICES SALES SINCE 2014

BUSINESS ACTIVITIES

GREATER VICTORIA SPORT TOURISM COMMISSION

STRATEGY

The Greater Victoria Sport Tourism Commission (GVSTC) has had a strong second year in 2019. Sport tourism continues to grow in Greater Victoria thanks to the efforts of the GVSTC.

Work on a sport tourism strategy has been completed, which will focus the GVSTC's mission over the next three-to-five years. Significant efforts have been expended in 2019 to better connect stakeholders through quarterly networking events. Increased transparency and dialogue have also resulted from our quarterly GVSTC Committee meetings.

The GVSTC continues to bid on significant national and international events that will raise the profile of Greater Victoria as a sport tourism destination. The goal is to generate new tourism business, and to achieve widespread international recognition. At the same time, the GVSTC will continue to support the dozens of smaller sporting events - both local and provincial - that take place in the Greater Victoria region every year. In particular, the GVSTC strengthened our relationship with the University of Victoria, supporting four national championships that will take place at UVic in the 2019-20 school year.

TACTICS

The GVSTC continues to take advantage of the excellent in-house marketing and creative expertise at Destination Greater Victoria. The bid documents are professional, attractive and have already helped achieve successful bids, such as the 55+ BC Games, the 2020 Pan Am Cross Country Championship and our bid for the 2022 Invictus Games.



PARTNERSHIPS

Major efforts have preserved and enhanced partnerships since the GVSTC was launched in April 2018. As a membership-driven organization, the GVSTC is working hard to improve its newsletter, sports calendar, website and networking events for members in the business and hospitality industry.

SOURCES OF FUNDING

- Municipal and Regional District Tax
- Destination Marketing Fund – On specific activities that generate hotel stays
- Membership revenue

MONTH	ACTIVITIES	LOCATIONS
MAR	Canadian Sports Tourist Alliance, Sport Events Congress	Edmonton
APR	SportAccord	Beijing (canceled. Canada no longer sending a contingent)

TIMEFRAME

Year-round, with bidding of events focused on spring, fall and winter.

EVALUATION

- Number of bids
- Significance of bids/sports legacy
- Potential room nights
- Confirmed room nights
- National and International media visibility
- Membership revenue

2020 Performance Measures



8,000
Room Nights



\$90,000
Membership



16TH
Global Sport Impact Index
(Canadian overall)



RESEARCH AND GOVERNANCE

STRATEGY

Develop and implement research initiatives and governance processes to facilitate Destination Greater Victoria's strategic direction and planning as well as effective organizational oversight and performance. The purpose of Destination Greater Victoria's research activities is to inform business development and provide members, partners and stakeholders with industry information to support decision making. The purpose of Destination Greater Victoria's governance activities is to support the Board of Directors and advisory Committees in representing members and partners, delivering strong governance, overseeing organizational performance and providing strategic input.

TACTICS

- Monitor and evaluate Destination Greater Victoria's performance on key strategic measures using the Balanced Scorecard framework.
- Collate, analyze and report tourism industry data from multiple sources to help inform Destination Greater Victoria's strategies and business unit activities.
- Provide industry information and reports as resources for members, partners and stakeholders.
- Undertake research initiatives to address information gaps, answer industry-oriented questions and monitor performance.
- Provide support and tools for efficient Board and advisory Committee activities, including collating meetings packages, facilitating meetings, maintaining governance records as well as the Board and Committee Portal, and coordinating Board and Committee nominations.
- Support Director development and education through organizational membership of the Institute of Corporate Directors, including access to ICD's resources, webinars, seminars and training programs.

PARTNERSHIPS

Hotel Association of Greater Victoria, Chemistry Consulting Group, STR, Destination Canada, Destination British Columbia, Destinations International, Travel and Tourism Research Association, Statistics Canada, Institute of Corporate Directors.

SOURCES OF FUNDING

- MRDT, Membership Revenue

TIMEFRAME

- Year-round

PERFORMANCE

- Performance measures support Destination Greater Victoria's Enterprise Balanced Scorecard.

2020 ENTERPRISE BALANCED SCORECARD

Unit	2016 Result	2017 Result	2018 Result	2019 Target	2020 Target	2021 Target	2022 Target
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GREATER VICTORIA TOURISM INDUSTRY INDICATORS ¹								
Accommodation Occupancy Rate	%	74.23	73.42	76.43	74.20 ²	73.50 ²	---	---
Average Daily Room Rate	\$	159.55	169.19	184.20	171.00 ²	175.00 ²	---	---
RevPAR	\$	118.43	124.21	140.77	129.00 ²	133.00 ²	---	---
Conference Centre Delegate Days	#	106,808	108,836	121,430	110,000	120,000	122,000	124,000
YYJ Airport Arrivals	#	1,856,421	1,934,842	2,048,627	---	---	---	---

FINANCIAL PERSPECTIVE								
Marketing Campaign ROI	ratio	58:1	56:1	59:1	36:1	40:1	42:1	44:1
Business Events Confirmed Room Nights	#	12,169	22,966	34,184	23,500	35,000	40,000	45,000
Victoria Conference Centre Revenue	\$	1,132,846	1,330,263	1,508,427	1,200,000	1,300,000	1,375,000	1,425,000
Visitor Centre Ticket Sales	\$	1,595,939	1,855,703	1,994,912	2,500,000	2,000,000	2,250,000	2,500,000
Gross DGV Membership Services Revenue	\$	1,096,784	1,095,378	1,124,832	1,200,000	1,115,000	1,150,000	1,200,000
Gross GVSTC Membership Revenue	\$	---	---	---	100,000	100,000	100,000	100,000
Room Nights Attributable to Sport Tourism	#	---	---	---	8,000	10,000	12,000	14,000
Room Nights Attributable to Major Events & Conferences	#	---	---	---	3,000	3,500 ³	8,500 ⁴	6,000
Major Events and Conferences Attendees	#	---	---	---	12,000	10,000	15,000 ⁴	11,500
Major Events and Conferences Portfolio Net Revenue	\$	---	---	---	15,000	15,000	17,000	17,000
Proportion of Gross Revenue Allocated to Labour	%	35.8	29.8	32.4	35.0	38.0	38.0	38.0

CUSTOMER PERSPECTIVE								
Sessions on TourismVictoria.com Total Digital Platform	#	2,133,963	1,836,529	1,942,040	2,000,000	2,000,000	2,050,000	2,100,000
Travel Media & Influencer Placements	#	319	329	328	250	285 ⁵	325	350
New Business Leads for Members (BEV and Leisure)	#	328	484	516	400	450	500	550
Incremental Overnight Tour Programs	#	16	12	37	20	25 ⁶	30 ⁶	35 ⁶
Travel Trade Cooperative Programs ROI	ratio	---	---	5:1	5:1	8:1	10:1	12:1
Membership Retention	%	---	---	---	---	89	90	91
Business Events Potential Room Nights	#	56,058	77,263	159,112	80,000	---	---	---
Sport Tourism Potential Room Nights	#	---	---	---	30,000	---	---	---

Unit	2016 Result	2017 Result	2018 Result	2019 Target	2020 Target	2021 Target	2022 Target
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INTERNAL PROCESS PERSPECTIVE

Annual Savings Attributable to Process Efficiencies	\$	16,389	18,950	40,000	10,000	10,000	10,000	10,000
Accuracy of Quarterly Financial Forecasts	%	---	---	---	Within 5%	Within 5%	Within 5%	Within 5%
Cascading Balanced Scorecard	---	---	---	---	Complete	Roll Out	Complete	---

LEARNING AND GROWTH PERSPECTIVE

Employee Engagement Composite Measure	%	63.3	65.7	68.6	70.0	71.0	72.0	73.0
Median Years of Employee Tenure	#	---	---	---	2.3	3.0	3.6	4.2
Staff Undertaking Professional Development	%	---	---	---	100	---	---	---
Organizational Continuity Program	---	---	---	---	Underway	---	---	---

FOUNDATION

Member Satisfaction Rate (Satisfied or Neutral)	%	97	90	90	90	90	90	90
Board and Committee Meetings Participation	%	---	---	---	80	80	80	80
Local Media Placements	#	134	118	117	115	125	130	135
Political Briefings or Opportunities	#	40	41	55	45	55 ⁷	60	65
Community Support for Tourism	---	---	---	98% Positive	Monitor	Assess	Monitor	Monitor
DGV Environmental Carbon Offset and Reduction Plan	---	---	---	---	---	Measure	Reduce	Reduce

1 Source: Chemistry Consulting Group – Victoria Tourism Bulletins.

2 Source: Chemistry Consulting Group – Greater Victoria Occupancy, ARR and RevPAR Projections Report 2017.

3 Target reflects Deuce Days not occurring in 2020.

4 Target reflects anticipated impact of the 55+ BC Games in 2021.

5 Target reflects one-time redirection of resources to GoMedia 2020.

6 Dependent on volatility of the Chinese market.

7 Increase in target reflects higher profile through the Executive Director, Greater Victoria Sport Tourism Commission.



GREATER VICTORIA VISITORS & CONVENTION BUREAU

2020 BUDGET OVERVIEW

Ordinary Income/Expense	BUDGET 2019	FORECAST 2019	BUDGET 2020
Income			
Total Commission Revenue	250,843	197,450	200,000
Total Destination Marketing Fee (DMF)	1,784,000	1,737,534	1,699,160
Total Grant Revenue	30,000	36,760	20,000
Total Hotel Tax Revenue	5,766,168	5,788,719	5,788,719
Total Membership Services	1,147,275	1,103,349	1,161,064
Total Miscellaneous Revenue	23,842	53,999	6,000
Total Retail Sales	74,194	60,397	58,400
Total Sports Tourism	100,000	82,840	75,000
Total Income	9,176,321	9,061,048	9,008,343
Total COGS	64,614	50,930	50,807
Gross Profit	9,111,707	9,010,118	8,957,536
Expense			
Marketing Expenses			
Total Advertising	1,232,000	1,152,324	1,119,000
Total Business Events Victoria	1,361,780	1,387,149	1,107,555
Total General Marketing	201,600	37,335	74,500
Total Major Events & Conferences	296,335	254,093	239,600
Total Publications	215,000	208,623	206,000
Total Research	102,280	105,103	188,016
Total Corporate Communications	134,550	96,860	127,634
Total Sports Tourism Commission	145,000	144,471	218,000
Total Travel Media	166,444	199,425	277,343
Total Travel Trade	304,810	255,567	208,500
Total Website	311,864	304,896	217,800
Total Marketing Expenses	4,471,662	4,145,846	3,983,948
Operating Expenses			
Amortization	85,000	88,641	95,000
Total Communications	95,980	94,643	93,457
Total Facilities Rent & Taxes	455,954	423,219	452,002
Total General Travel & Conferences	70,560	86,580	98,250
Total Grants & Sponsorships	95,000	152,527	98,500
Total Interest & Bank Charges	98,990	82,034	94,580
Total Membership Events	95,230	71,689	104,800
Total Operating Supplies	157,690	187,028	320,000
Total Professional Services	246,112	248,796	189,034
Total Utilities & Premises	39,540	70,986	63,700
Total Operating Expenses	1,440,057	1,506,143	1,609,323
Total Wages & Benefits	3,199,988	3,112,188	3,364,265
Total Expense	9,111,707	8,764,177	8,957,536
Net Income	0	245,941	0

NOTES

DESTINATION GREATER
VICTORIA