

GREATER VICTORIA DESTINATION DEVELOPMENT STRATEGY



DESTINATION
BRITISH COLUMBIA®

VICTORIA
Photo: Clint Rivers

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DESTINATION GREATER
VICTORIA



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EXECUTIVE SUMMARY

A. DISTINCTIVE DESTINATION

The Greater Victoria Destination Development Strategy (DDS) is a product of Destination BC's (DBC) Destination Development Program (an integrated strategic planning process) co-led by Destination BC and Destination Greater Victoria.

The intent of the DDS is to provide a high-level, strategic road-map to help enhance the tourism competitiveness of Greater Victoria¹ over the next 10 years, by managing the natural life-cycle of its tourism assets to ensure that tourism services, amenities, and practices evolve to meet and exceed visitor expectations.

The DDS was developed on a collaborative basis that involved the creation of a Situation Analysis report, in-person and survey consultation with tourism

partners, and the hands-on engagement of a Working Group. The Working Group represents a broad cross-section of Greater Victoria's tourism industry. Its members contributed to the prioritization of strategic initiatives and the development of actions for each of these initiatives. Implementation of the Greater Victoria DDS will be led by Destination Greater Victoria, who will engage with tourism partners and stakeholders as strategic initiatives are pursued over the short, medium, or longer term.

¹Throughout this document, the reference to "Greater Victoria", which is the study area for the Greater Victoria Destination Development Strategy, refers to the geographic area encompassed by the Capital Regional District, not including the Gulf Islands.

As a well-established tourism destination, Greater Victoria is blessed with a wide range of tourism assets, attractions, and experiences within a scenic, vibrant, safe, and accessible environment.

THE PLANNING AREA’S KEY TOURISM STRENGTHS AND DIFFERENTIATORS INCLUDE ITS WALKABILITY, NATURE, PARKS, GARDENS, RELAXING NATURE, ISLAND LIFESTYLE, HISTORIC ARCHITECTURE AND HERITAGE SITES, MARINE WILDLIFE VIEWING AND

OTHER WATER ACTIVITIES, AS WELL AS MUSEUMS, GALLERIES, AND OTHER ATTRACTIONS – ALL CONTRIBUTING TO AN ENGAGING LOCAL VIBE.

While Greater Victoria benefits from a range of tourism strengths, it is also facing a number of destination development challenges, some of which have the potential to impact the future growth and sustainability of the tourism sector. To build on these strengths and address these challenges, the planning area’s tourism partners have identified a number of key opportunities that form the foundation of the Greater Victoria Destination Development Strategy.

FIGURE 1: Strengths, Activities, and Opportunities

KEY STRENGTHS	KEY CHALLENGES	KEY OPPORTUNITIES
<ul style="list-style-type: none">• Access opportunities• Historical, architectural, and heritage sites• Marine-oriented assets and opportunities• Mix of iconic and new attractions• Parks and gardens• Scenic, natural beauty• Unique vibe• Walkability/trails• Wineries/local food	<ul style="list-style-type: none">• Limited capacity at peak times (hotels, ferries)• Lack of off-site venues for hosting larger events• Seasonality of activities and demand• Shortage of affordable workforce housing• Regional highway capacity limitations• Perception that the region is difficult to access	<ul style="list-style-type: none">• Conference and event space• Complete Belleville Street Terminal• Ogden Point redevelopment• Off-season events, activity and tour opportunities• Leverage opportunities along Sooke to Port Renfrew corridor• Enhanced air and marine gateway role

Greater Victoria's Destination Development Strategy aims to achieve the following vision which reflects the aspirations of tourism partners as to what the planning area will look like as a destination in 10 years.

VISION FOR GREATER VICTORIA

AS A PREMIER GATEWAY TO VANCOUVER ISLAND, GREATER VICTORIA IS AN ENERGETIC, CULTURED, AND BEAUTIFUL DESTINATION WITH A CREATIVE VIBE WHERE THE JOURNEY TO THE REGION MARKS THE BEGINNING OF A SEAMLESS VISITOR EXPERIENCE. A RANGE OF HIGH-QUALITY, YEAR-ROUND ACTIVITY OPTIONS SUPPORT THE CREATION OF REMARKABLE VISITOR MEMORIES, AS WELL AS A HEALTHY AND SUSTAINABLE TOURISM INDUSTRY. VISITORS LEAVE FEELING REFRESHED, ENERGIZED, AND INSPIRED TO BE AMBASSADORS FOR THE REGION.

In support of Greater Victoria's Destination Development vision, the following six goals will be pursued.

- | | |
|---|---|
| 1. Enhance and protect the quality of the visitor experience | 4. Enhance the seasonal and regional (Greater Victoria) dispersion of visitors |
| 2. Foster a collaborative working environment amongst Greater Victoria tourism partners | 5. Increase the contribution of tourism to the regional economy |
| 3. Encourage operators to establish new and/or enhanced tourism attractions and experiences | 6. Increase municipal and resident awareness of tourism so that tourism interests are reflected in municipal planning processes |

B. CATALYST PROJECTS

To achieve the above goals, 27 priority initiatives have been identified and are grouped by the following development theme areas:

THEME 1: Completing significant tourism infrastructure projects

THEME 2: Improving access to and transportation within the region

THEME 3: Enhancing and protecting the visitor experience

THEME 4: Increasing shoulder and off-season products and experiences

THEME 5: Supporting industry development

THEME 6: Meeting industry labour force needs

THEME 7: Enhancing the policy and regulatory climate for business success

Each of the 27 initiatives presented in this Destination Development Strategy will make a positive contribution to the longer-term development of Greater Victoria as a vibrant and sustainable tourism destination.

In the shorter term, the following six initiatives are viewed as catalyst projects for spurring the planning area's tourism sector to achieve its growth potential:

1 COMPLETE SIGNIFICANT TOURISM INFRASTRUCTURE PROJECTS

- Establish Ogden Point as a cruise ship home-port that will contribute to the development of additional visitor products (Initiative 2)
- Develop interesting off-site conference and event venue(s) capable of accommodating large groups (Initiative 5)

2 IMPROVE ACCESS TO AND TRANSPORTATION WITHIN THE PLANNING AREA

- Support YYJ expansion to accommodate direct flights from the U.S. and other hubs (Strategy 7)

- Continue to pursue expansion of U.S. Customs pre-clearance operations at key Greater Victoria access/egress points (Initiative 8)

3 INCREASE OFF-AND SHOULDER-SEASON PRODUCTS AND EXPERIENCES

- Develop more shoulder and off-season experiences and increase shoulder and off-season business meeting activity (Initiative 19)

4 ENHANCE THE POLICY AND REGULATORY CLIMATE FOR BUSINESS SUCCESS

- Address regulatory and liability issues regarding access to Crown land that are limiting tourism potential related to motorized and non-motorized recreational use and for foraging activities (Initiative 26)

II. ACRONYMS

BCLCA	BC Lodging & Campground Association	INSTO	International Network of Sustainable Tourism Observatories	TFWP	Temporary Foreign Worker Program
BEV	Business Events Program			TIABC	Tourism Industry Association of British Columbia
CBSA	Canadian Border Service Agency	ITAC	Indigenous Tourism Association of Canada	TIAC	Tourism Industry Association of Canada
CRD	Capital Regional District	ITBC	Indigenous Tourism British Columbia	TDMC	Transportation and Destination Management Committee
DBC	Destination British Columbia	TRAN	Ministry of Transportation and Infrastructure		
DDS	Destination Development Strategy	MRDT	Municipal and Regional District Tax	TVI	Tourism (Association of) Vancouver Island
DFO	Department of Fisheries and Oceans	NPS	Net Promoter Score	UNWTO	United Nations World Tourism Organization
DMO	Destination Marketing (Management) Organization	OCP	Official Community Plan	USCBP	United States Customs and Border Patrol
		PNWER	Pacific Northwest Economic Region	VCON	Victoria Conference Optimization Network
FLNRO	Ministry of Forest, Lands and Natural Resource Operations and Rural Development	RDMO	Regional Destination Management Organization	WSF	Washington State Ferry
GVHA	Greater Victoria Harbour Authority	SROW	Southern Resident Orca Whale	YYJ	Victoria International Airport
		TAC	Ministry of Tourism, Arts and Culture		



1

FOREWORD AND ACKNOWLEDGEMENTS

WASHINGTON STATE FERRIES
Photo: Sidney BIA

The Greater Victoria Destination Development Strategy (DDS) reflects the input of numerous tourism partners in the planning area representing a range of organizations, businesses, and government agencies.

We thank the Songhees and Esquimalt First Nations on whose traditional territories we gathered for our meetings. Thanks also to everyone who participated in workshops and meetings, completing surveys, providing background information, and other input. In particular, the Greater Victoria Destination Development Working Group played a

key role in refining strategic goals and priorities, and contributing to the substance of the actions for each prioritized strategic planning initiative. The participation of our partners throughout the process was invaluable, but it is important to note that no endorsement of this strategy or any action listed within was obtained.



Members of the Working Group include:

- Paul Nursey, President & CEO, Destination Greater Victoria
- Jim Zeeben, Manager, Corporate Communications and Public Affairs, Destination Greater Victoria
- Brett Soberg, Owner, Eagle Wing Whale Watching
- Dale Ryan, Director, Public Relations, Sales and Marketing, The Butchart Gardens
- Cole Millen, Director of Operations, Fairmont Empress
- Ryan Malane, Co-owner, Black Ball Ferry Line
- Scott Meis, VP of Marketing, Clipper Vacations
- Ian Robertson, CEO, Greater Victoria Harbour Authority
- Starr McMichael, Owner, Starrboard Enterprises (Destination Greater Victoria Board of Directors)
- Bruce Whyte, Senior Tourism Development Officer, Ministry of Jobs, Trade and Technology
- Dave Petryk, President and CEO, Tourism Vancouver Island
- Calum Matthews, Community and Industry Specialist, Tourism Vancouver Island

Special thanks are offered to the facilitators of the Greater Victoria destination development process:

- Dinah White, Chemistry Consulting
- Greg Klassen, Twenty31

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INTRODUCING THE STRATEGY

OGDEN POINT BREAKWATER
Photo: Tanya Goehring

The Greater Victoria Destination Development Strategy was developed to enhance the competitiveness of Greater Victoria over the next 10 years.

It was prepared as part of Destination BC's Destination Development Program to support and guide the long-term growth of tourism in Greater Victoria. The goal of destination development is to align the priorities of the tourism industry, government, and First Nations to develop and deliver quality experiences that focus investment and action towards sustainable benefits for the visitor, host businesses, and communities.

The result of destination development planning is a collaborative, integrated approach to setting priorities which will inform and guide future private, public and not-for-profit investment that ensures BC remains a relevant and compelling destination in an increasingly complex and competitive global tourism industry.

A. DESTINATION DEVELOPMENT DEFINITION

i. VISITOR ECONOMY

Destination development is the conscious and continuous process of coordinating and developing the tourism industry to strengthen the visitor economy. Tourism is a pillar of BC's economy employing more than 127,500 people annually through

19,000 businesses that, together with the support of government, generate \$15.7 billion² in revenue annually and \$7.4 billion of value added to the BC economy as measured through GDP (in 2007 constant dollars).

FIGURE 2:
Tourism Revenue
Drivers



Key principles supporting the strategic and sustainable growth of the visitor economy through destination development planning include:

- Protect the environment and maintain ecosystem health
- Appreciate and respect community values and community distinctiveness
- Respect, support and engage First Nations and all residents and visitors
- Retain the ability to unplug and relax
- Seek benefits for all tourism partners/communities along the corridor
- Contribute to economic sustainability
- Seek to innovate and be creative
- Seek to collaborate



The VISITOR ECONOMY refers to the widespread and often unseen benefits from dollars spent by travellers. It encompasses everything that attracts visitors to a destination; that makes a place special, distinctive, and capable of engendering price and interest in a place worth experiencing.

The full impact of the visitor economy is felt when the multiplier effect of tourist spending ripples throughout the entire economy, supporting job creation, infrastructure development, community building, strengthening the brand, and engaging visitors in memorable experiences.

II. FOCUS ON SUPPLY

Tourism has two primary drivers: supply and demand. Compelling marketing efforts strive to create short-term demand for a destination and create immediate urgency for people to want to visit. Destination development focuses solely on the supply side of tourism by providing compelling experiences, quality infrastructure and remarkable services to entice repeat visitation.

Destination development is the mechanism whereby the destination life cycle is managed to ensure that a destination evolves to remain “desirable” for the ever-changing consumer. Destination development happens when industry and government plan to enhance the quality of the visitor’s experience by ensuring tourism services, amenities and practices meet and exceed visitor expectations.

²Government of British Columbia. Jobs plan tourism sector profile.pdf. A publication of the (then) Ministry of Jobs, Tourism and Skills Training (2017, March).

B. DESTINATION DEVELOPMENT PROGRAM VISION

The overall DBC Destination Development Planning program is guided by the following vision:

BC is a world-class tourism destination that offers remarkable products and experiences that are authentic, driven by visitor demand, exceed expectations, and align with BC's brand.

C. DESTINATION DEVELOPMENT PROGRAM GOALS

In support of this vision, the goals of the Destination Development Program are to:

- Make British Columbia the most highly recommended destination in North America
- Create strategic 10-year plans for tourism development and improve return-on-investment for government and private sector investments in tourism assets
- Elevate British Columbia's ability to compete as a premium destination while making the province more attractive for investment

D. PURPOSE OF THE STRATEGY

Destination development is all about bringing together planning, policy and capacity building efforts to:

- Ensure that a destination is well-positioned to make future strategic decisions
- Address impediments to growth and capitalize on opportunities
- Outline key assets of a destination including the main product themes/ experiences available
- Outline key priorities for new product, infrastructure and amenity development
- Identify impediments to development and tourism growth (e.g., potential policy or capacity issues, access to funding, etc.)

Figure 3: Five Dimensions of Supply — the Visitor Experience



The Greater Victoria Destination Development Strategy is intended to serve as a guide for tourism partners as they proceed with implementation. This document should be reviewed and updated as necessary to reflect changing tourism objectives, priorities and market conditions.

Results should be tracked regularly to ensure learnings can help future implementation activities be even more effective in increasing the economic, social and cultural benefits of tourism in the Greater Victoria planning area.

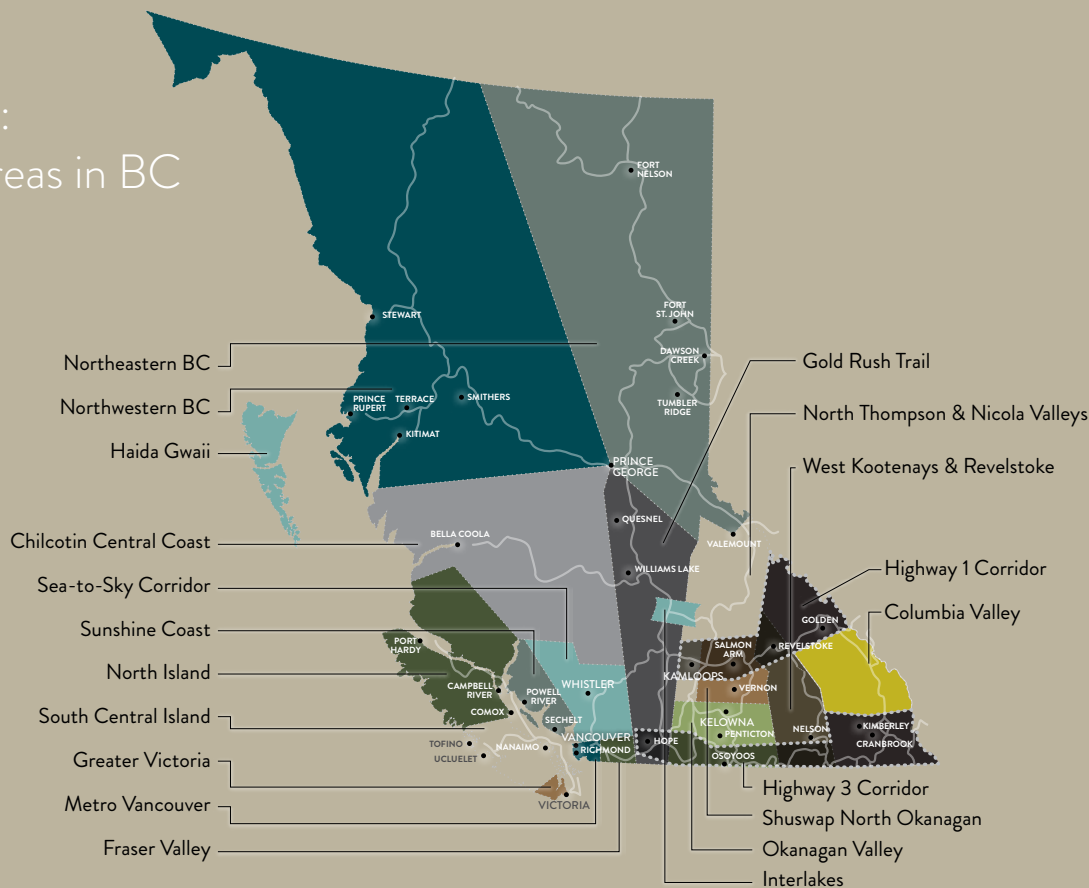
E. CREATING A FOUNDATION

Destination BC completed extensive consultation across the provincial government and Regional Destination Management Organizations (RDMOs) as it was developing the destination development planning program and process.

The approach has been designed to be led by consumer insights and behaviors, while still meeting the unique needs of tourism regions. A standardized planning process is being used across planning areas to facilitate a roll-up into regional strategies and ultimately into a single provincial strategy.

The 20 planning area development strategies will form the foundation of knowledge on which to build a provincial strategy to guide tourism development in the future. The Greater Victoria strategy will also be used to inform the creation of a Vancouver Island regional strategy. Each planning area represents a logical travel route for visitors in and around the province. As visitors do not make travel decisions based on artificial boundaries created by governments and organizations, planning areas cross multiple jurisdictions, thus reinforcing the importance of an integrated approach with shared visions and investments.

FIGURE 4:
Planning Areas in BC



F. METHODOLOGY – PLANNING PROCESS

The Greater Victoria DDS process involved a combination of facilitated, in-person consultations and planning workshops over an eight-month period beginning in December 2016.

The strategy was developed based on extensive, collaborative efforts that occurred over this timeframe and culminated in the creation of a Situation Analysis report, and the development of recommendations by a Working Group comprised of Greater Victoria tourism partners. The Working Group contributed to the prioritization of strategic initiatives and the development of actions for each of these initiatives³. Three workshops were held in Greater Victoria with over 65 participants. In addition to the workshops, interviews were conducted with key tourism partners, and two online surveys were completed: a destination assessment survey and a future direction survey.

It is intended that implementation of the Greater Victoria DDS will be led by Destination Greater Victoria, which will engage tourism partners and stakeholders as the priority strategic initiatives presented in Section 8 are implemented. The Destination BC vision for destination development planning shown on page 3,

complements the following Destination Greater Victoria mission, vision and brand promise. In turn, both these vision statements complement the vision for the Greater Victoria DDS which is presented in Section 6.

DESTINATION GREATER VICTORIA MISSION, VISION AND BRAND PROMISE

MISSION: We inspire the world to experience our destination.

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.

BRAND PROMISE: Victoria is where old-world tradition meets new-world experiences. Our guests are rejuvenated by fresh ocean air and are inspired by our warm, island welcome and year-round, natural beauty.

³See Appendix 1 for more details on the Greater Victoria Destination Development Planning process, and Appendix 2 for a list of the key Planning Considerations that informed this document which, in turn, were drawn from the Situation Analysis and is available under separate cover.

G. KEY OUTPUTS

The three key outputs from this project include:

1. An asset summary of accommodation, tourism businesses and attractions, tourism organizations, parks and recreation sites, sports and arts facilities, transportation, and visitor services.
2. A Situation Analysis that provides detailed insights into Greater Victoria's tourism industry, and identifies planning area assessment considerations.
3. This destination development strategy.

Over the course of Destination BC's Destination Development Planning Program, each of the province's six tourism regions will integrate their planning area DDS into a Regional DDS which, in turn, will be used to inform a provincial DDS.

The strategies will be influenced by, and where appropriate reflect and complement, other planning initiatives. At the senior government level, tourism and related strategies developed by the Government of Canada, Destination Canada, and the Government of British Columbia provide high-level guidance on the changing tourism landscape and how the domestic industry (and communities) can adapt and thrive. In addition to government planning processes related to tourism, other layers of planning that are relevant to

the destination development planning process may be conducted by the following organizations:

1. ASSOCIATIONS AND AGENCIES REPRESENTING DIFFERENT TOURISM SUB-SECTORS (e.g., culinary, sport fishing, kayaking, boating) and services (e.g., advocacy, human resources, marketing): These organizations play an important role in many aspects of the demand-side of tourism sector development, specifically in relation to the involvement and interests of the private sector.

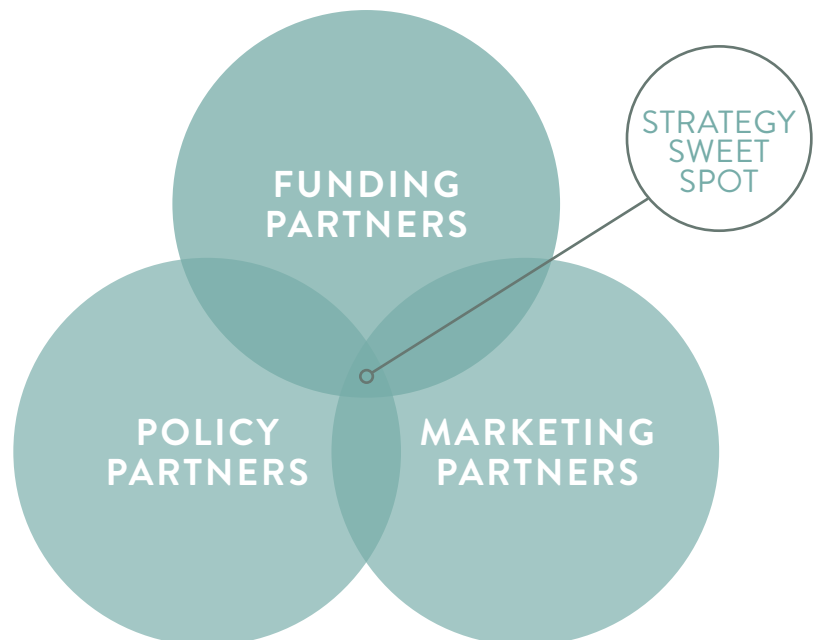
2. DESTINATION MARKETING

ORGANIZATIONS (DMOS): The marketing and promotional (and, in some cases, destination development) efforts of community DMOs are relevant to the destination development planning process as these efforts are typically focused on the supply-side of a community's tourism sector (e.g., marketing the community's tourism assets).

3. LOCAL GOVERNMENT COMMUNITY AND REGIONAL PLANS: These plans can have direct or indirect implications for tourism destination development (e.g., trail development, zoning for commercial short-term accommodation; protection of visual/scenic assets, commercial property tax frameworks, regulation of the sharing economy, etc.).

Figure 5 and 6 below on the next page depict the state of alignment between those tourism organizations that influence and/or will play a role in implementing the Greater Victoria DDS. Figure 6 provides a big picture overview of how the Greater Victoria DDS process aligns with other levels of planning from the federal to the community level (a more detailed list of the various organizations at each level is provided in Figure 5, while a list of the relevant roles, responsibilities and/or programs of each organization is provided separately in the report Greater Victoria Destination Development Situation Analysis. Figure 5 illustrates the alignment between Destination Greater Victoria and its funding, marketing and policy partners.

FIGURE 5:
Destination Greater
Victoria's Funding,
Marketing and
Policy Partners



Source: Destination Greater Victoria's 2017-2021 Strategic Plan

FIGURE 6: Levels of Destination Development Planning

FEDERAL	PROVINCIAL	REGIONAL	FIRST NATIONS	ASSOCIATIONS	DESTINATION MARKETING ORGANIZATIONS
<ul style="list-style-type: none"> • Government of Canada (Canada's Federal Tourism Strategy) • Destination Canada (National DMO) 	<ul style="list-style-type: none"> • Government of BC (Provincial Tourism Strategy: Gaining the Edge) • Destination BC (Provincial DMO) • Other provincial agencies and strategies with tourism implications (e.g., BC Parks' Future Strategy) 	<ul style="list-style-type: none"> • Regional Districts (planning, zoning, etc.) • Municipalities (planning, zoning, bylaws, economic development, etc.) 	<ul style="list-style-type: none"> • Local First Nations • Indigenous Tourism Association of BC • Indigenous Tourism Association of Canada 	<ul style="list-style-type: none"> • Sector (e.g., culinary, fishing, etc.) • Industry and Advocacy (e.g., TIAC, TIABC) 	<ul style="list-style-type: none"> • Local/regional tourism marketing





4

SUCCESS NETWORK

TRONCY ALLEY
Photo: Tanya Goehring

Success networks represent the clusters of businesses and organizations (private sector, government, and not-for-profit) who are encouraged to collaborate and work in harmony to bring the opportunity to fruition.

Successful destination development implementation recognizes that “we all have a role to play”. The recommendations contained within this Destination Development Strategy form the foundation for additional focused and aligned discussions regarding implementation locally, regionally, and provincially.

Organizations identified within each tactical success network will be in a position to review, locally, regionally, and provincially, the potential for growing tourism, by leading, or supporting implementation, and action. It does not imply the organizations have committed or endorsed the tactic. This strategy is intended to inform conversations that may lead to future investments and

actions, or that will contribute to growing this planning area’s and British Columbia’s visitor economy.

IT IS IMPORTANT
TO NOTE THAT THE
DEVELOPMENT
OPPORTUNITIES
ARE NOT MUTUALLY
EXCLUSIVE.

The stakeholders demonstrated a desire to work together throughout the community consultations. The complexity of the tourism opportunity is understood in the Greater Victoria destination.



A number of tourism partners have already articulated their desire to work cooperatively, as a unified Greater Victoria destination, on destination development initiatives. It is believed that only by working collaboratively that the true potential of Greater Victoria can be realized.

This strategy is intended to inform actions for the future, which over time may be embedded in the local, regional, and provincial decision making. The result will be an integrated system of priorities that will achieve better development decisions, drive greater tourism revenues, and realize benefits for businesses and communities in Greater Victoria. All this will contribute to a thriving, vibrant, and growing economy.

Joint strategy ownership among all planning area tourism partners is a critical component of this program's success. The planning process identifies a suggested success network of tourism partners to champion and move actions within each objective forward. However, during implementation, leads and involved parties would need to be verified. In many instances, executing on an initiative may require sharing responsibilities and entities listed will be responsible to lead their own areas.

The regional representative on Vancouver Island has an important role to play as regional destination development champion. As this planning process is not intended to duplicate ongoing efforts or create new organizational or administrative structures, the implementation of this strategy should first be executed through existing organizations, where possible.

FIGURE 7: Key Governmental and Management Organizations

The following partners have been identified collectively through the strategy development process as likely playing a role in moving a potential objective or action forward:

FEDERAL	PROVINCIAL	FIRST NATIONS	REGIONAL	LOCAL	OTHER
<ul style="list-style-type: none"> • Destination Canada • Western Economic Diversification • Parks Canada • Department of Ocean and Fisheries • Public Safety Canada • Transport Canada 	<ul style="list-style-type: none"> • Destination BC • Indigenous Tourism BC • go2HR • Ministries/ Agencies: <ul style="list-style-type: none"> - Tourism, Arts and Culture - Jobs, Trade and Technology - Transportation and Infrastructure - Forests, Lands, Natural Resource Operations and Rural Development - Indigenous Relations and Reconciliation - Environment and Climate Change Strategy - Agriculture - Municipal Affairs & Housing - BC Parks • BC Ferries 	<ul style="list-style-type: none"> • Local First Nations <ul style="list-style-type: none"> - Esquimalt - Malahat - Pacheedaht - Scia'new - Songhees - Tsartlip - Tsawout - Tseycum - T'Sou-ke • ITAC • ITBC 	<ul style="list-style-type: none"> • Tourism Vancouver Island • BC Marine Trails Association • Vancouver Island Spine Trail Association • Island Corridor Foundation • BC Ocean Boating Tourism Association 	<ul style="list-style-type: none"> • Destination Greater Victoria • Oak Bay Tourism Committee • Sooke Region Tourism Association • Capital Regional District • Local Governments • Victoria Hotel Association • SportHost Victoria • Greater Victoria Harbour Authority • Victoria International Airport • Post-secondary institutions • Chambers of Commerce (Greater Victoria, Esquimalt, Saanich Peninsula, Westshore) • Business Improvement Associations/ Areas (Downtown Victoria, Oak Bay, Sidney) • Victoria Waterways Loop 	<ul style="list-style-type: none"> • Tourism Industry Association of BC • go2HR • Tourism Industry (i.e., operators / business owners)



5

A DISTINCTIVE DESTINATION

VICTORIA SEAWALL
Photo: Reuben Krabbe

OVERVIEW OF THE GREATER VICTORIA PLANNING AREA⁴

A. LOCATION, COMMUNITIES AND POPULATION OF THE GREATER VICTORIA PLANNING AREA

As shown in Figure 8 on the next page, the Greater Victoria Destination Development planning area encompasses all of the Capital Regional District (CRD) excluding the Gulf Islands. As of 2016, the CRD was home to approximately 372,000 residents distributed among 13 incorporated municipalities, 10 First Nations communities, and a number of non-incorporated communities as summarized in as summarized on the next page.

⁴This section provides an overview of Greater Victoria's tourism destination profile. More detailed tourism asset, performance and market information is provided in the Greater Victoria Situation Analysis (separate document).

FIGURE 8: Communities Within the Greater Victoria Planning Area

INCORPORATED MUNICIPALITIES

- District of Central Saanich
- City of Colwood
- Township of Esquimalt
- District of Highlands
- City of Langford
- District of Metchosin
- District of North Saanich
- District of Oak Bay
- District of Saanich
- Town of Sidney
- District of Sooke
- City of Victoria
- Town of View Royal

FIRST NATION COMMUNITIES

- Esquimalt First Nation
- Malahat First Nation
- Pacheedaht First Nation
- Pauquachin First Nation
- Scia'new (Beecher Bay) First Nation
- Songhees First Nation
- Tsartlip First Nation
- Tsawout First Nation
- Tseycum First Nation
- T'Sou-ke First Nation

UNINCORPORATED COMMUNITIES

- East Sooke
- Jordan River
- Malahat
- Otter Point
- Shirley
- Port Renfrew
- Willis Point
- Juan de Fuca Electoral Area (this EA encompasses all of the communities listed above)

GREATER VICTORIA

● Towns and Indigenous Communities

— Highways

— Lakes and Rivers

— National Parks

1. Pacific Rim National Park Reserve of Canada

2. Southern Gulf Islands National Park Reserve of Canada

— Provincial Parks and Protected Areas

1. Juan De Fuca Park

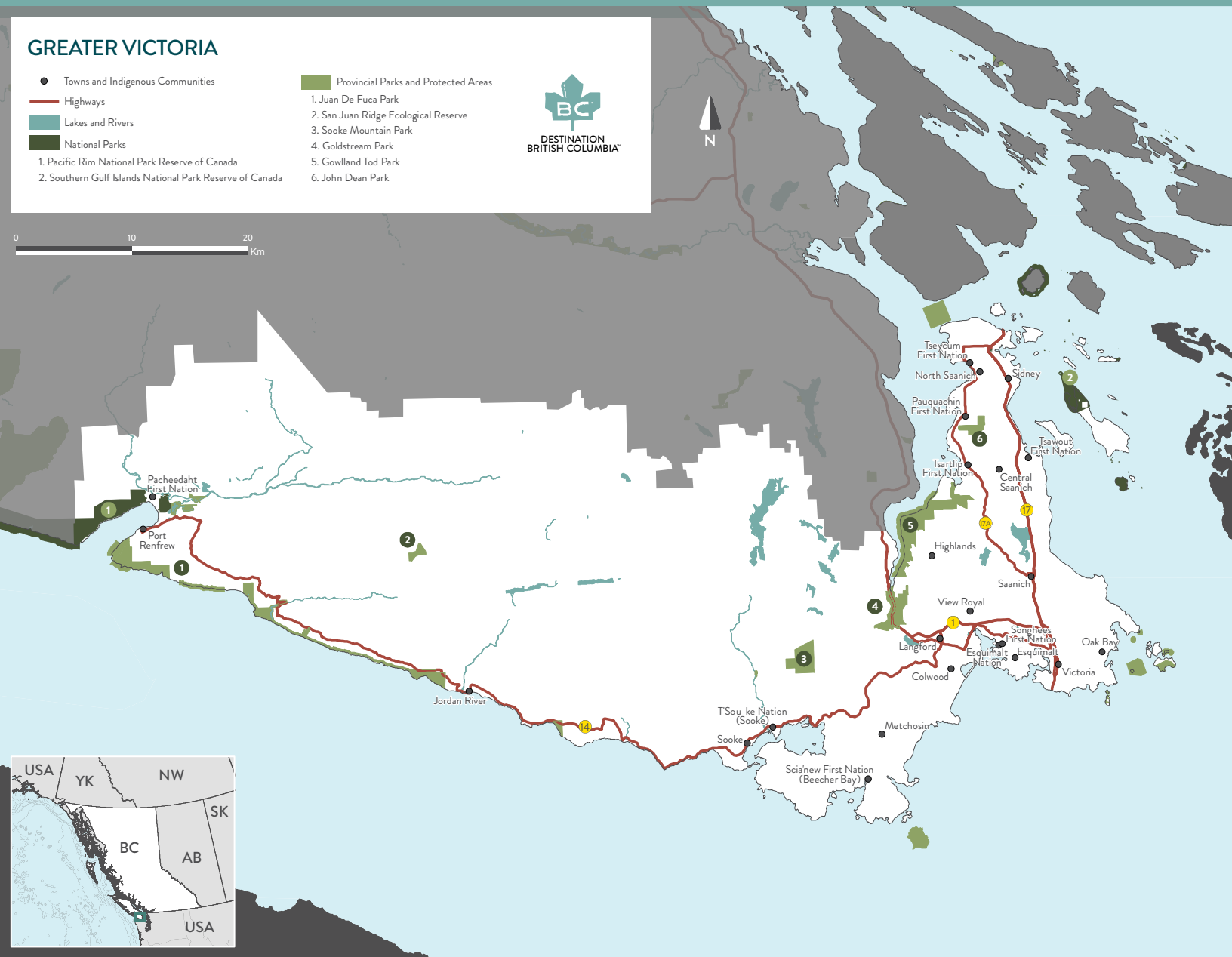
2. San Juan Ridge Ecological Reserve

3. Sooke Mountain Park

4. Goldstream Park

5. Gowlland Tod Park

6. John Dean Park



B. OVERVIEW OF GREATER VICTORIA TOURISM ASSETS, INFRASTRUCTURE AND UNIQUE SELLING PROPOSITIONS

In general, Greater Victoria is a well-established tourism destination that offers visitors a range of tourism assets within a scenic, vibrant, and safe environment. The appeal of the region has been confirmed by a number of traveller polls; for example, in the fall of 2016, Victoria was voted the seventh best city in the world by participants in the Condé Nast Travelers Readers' Poll.

A SCRAPE OF TRIPADVISOR REVIEWS WRITTEN BY VISITORS TO GREATER VICTORIA RESULTED IN THE IDENTIFICATION OF 77 CATEGORIES OF ATTRACTIONS REPRESENTING 290 INDIVIDUAL LOCATIONS OR BUSINESSES, NOT INCLUDING THE DOZENS OF FESTIVALS AND EVENTS HOSTED THROUGHOUT THE PLANNING AREA EACH YEAR — MANY OF WHICH ATTRACT VISITORS.

In terms of short-term commercial accommodation options, the planning area has close to 200 fixed-roof properties comprised of approximately 8,900 units (not including B&Bs with less than four units or units representing the “sharing economy”) and approximately 18 RV parks/campgrounds comprised of about 1,600 sites. The number of

shared-economy units is estimated at 1,800 based on an analysis of online listings conducted in the fall of 2016. The extent of the planning area's tourism assets and attractions are reflected by the fact that Destination Greater Victoria has more than 950 members as of summer 2017.

For visitors who do not live on Vancouver Island, Greater Victoria can be reached via five vehicle and/or passenger ferry routes (from the Lower Mainland as well as from Seattle, Anacortes, and Port Angeles, Washington), an international airport, floatplane, and helicopter services. Other operators are actively working towards adding additional ferry capacity between Greater Victoria and the Lower Mainland. Additionally, some visitors arrive via private vessel.

While visitors are drawn to a destination for any number or combination of reasons, a review conducted by Destination Greater Victoria of the findings of various surveys indicates that some of the key tourism strengths and differentiators helping to drive visitor demand include the planning area's walkability, nature, parks, gardens, relaxing nature, local lifestyle, historic architecture and heritage sites, marine wildlife viewing and other water activities, museums, galleries, and other attractions.

CRAIGDARROCH CASTLE
Photo: Jordan Dyck



During the destination development planning process, tourism partners were asked to identify factors that differentiate Greater Victoria and make it unique as a tourism destination. These assets, which reflect overlap with the survey results referenced above, include:

- Access opportunities (varied, easy, and adds to the travel experience — e.g., ferry, floatplane)
- Agriculture-based activities (e.g., wineries, craft beer, local food)
- Architecture
- Clean and safe
- Diversity and quality of tourism products and experiences (adventure, sport, culture, culinary tourism, etc.)
- Elite athlete training centres
- Festivals and events
- First Nation experiences
- Inner Harbour
- Interesting history (e.g., First Nations, colonial, etc.)
- Island lifestyle
- Location as a regional gateway
- Marine-based activity opportunities (e.g., boating, fishing, whale-watching, etc.)
- Mild climate
- Mix of urban and rural activity opportunities
- Natural beauty
- Nature and wildlife
- Regional trails and cycling opportunities
- Unique coast of North America vibe
- Variety and quality of tourism offerings
- Walkability
- Welcoming attitude to visitors
- Yacht and pleasure boat gateway to Pacific Ocean

A number of the demand generators and tourism differentiators listed above are reflected in Destination Greater Victoria's Unique Selling Propositions (USPs) which, pending an update underway at the time of writing, were focused on the following seven messages which highlight aspects of the planning area's tourism assets and attractions:

ASSET/ATTRACTION FOCUS	MESSAGES
TRANSPORTATION	Take a relaxing, scenic cruise along the rugged west coast on a ferry, hop on a float plane or helicopter and enjoy breathtaking views from the sky, or fly directly into the Victoria airport, one of the world's friendliest airports. Whatever you choose, the journey to Victoria is your first opportunity to create unforgettable memories.
ACCOMMODATIONS	In Victoria we have a special place that's the perfect fit for you. From grand, historic properties to stunning, contemporary hotels to cheerful bed and breakfasts, cozy inns and family-friendly suites, we have an array of lodging options at every price point to make your stay with us comfortable and convenient.
ATTRACTIONS	In Victoria there is never a shortage of things to do. From international icons like The Butchart Gardens to hidden gems like Canada's oldest Chinatown, your days in Victoria can be as busy as you want them to be. Victoria boasts a wide variety of popular attractions, museums and incredible tours to keep you engaged.
RELAXATION	Our warm island welcome and laid-back nature allows visitors to rejuvenate while immersing themselves in our culture and unique experiences. When you are in Victoria you are truly away from your everyday life, across the ocean, leaving worries and stress behind.
VIBRANCY	The Victoria vibe is unlike any other. Steeped in rich history, Victoria has an incomparable mix of old-world charm married with trendy new-world experiences. Only in Victoria can you explore among picturesque 125-year-old heritage buildings and discover the finest in galleries, boutique shopping, cocktail lounges and brewpubs along with a pulsing arts scene and year-round event calendar.
ADVENTURE	Victoria is the ideal playground for outdoor adventure enthusiasts. On land or at sea, outdoor activities are possible year-round in our temperate climate. From ziplining through treetops to crescent moon kayaking, diving, hiking or cycling, visitors will delight in the wild beauty of the Island.
CULINARY	Victoria has an extraordinary assortment of cuisine — from elegant fine dining to casual bistros, waterfront pubs and gourmet food trucks. Victoria chefs are blessed with an abundance of local fare including outstanding locally made wines, ciders, beers and spirits.

C. OVERVIEW OF GREATER VICTORIA TOURISM PERFORMANCE

Tourism activity in the Greater Victoria area has been experiencing strong rates of growth. By way of example:

- Total room revenue in Victoria (for properties with four or more rooms) has been increasing over the last six years with particularly strong year-over-year rates of revenue growth recorded in 2015 (+13.8%) and 2016 (+11.2%).
- Victoria's annual occupancy rates rose from 62.2% in 2012 to 74.2% in 2016. By way of comparison, the national occupancy rate was 62% in 2012 and 64.5% in 2016.
- Occupancy rates are highest between June and September and lowest between November and January.
- The number of BC Ferries' passengers travelling between the Lower Mainland and Greater Victoria has been increasing over the last few years and reached 5.88 million in 2015 and 6.13 million in 2016 (+4.2%) — the first year since the global economic crash that passenger counts have reached pre-2008 levels.

- Passenger volumes at the airport have been experiencing very strong growth over the last few years rising by 24% between 2011 and 2016 (or 4.8% per year on average). This increase means that in 2016, the airport served almost 357,000 more passengers than in 2011.
- The number of cruise ship passengers (not including crew members) has risen from 295,000 in 2005 to almost 557,000 in 2016 — an increase of 89% (or an average of 8% per year).
- Although the total number of visitors arriving in the planning area via private vessel is not known, it is known that of all the U.S. residents who enter Canada and clear customs via Greater Victoria, almost 2% arrive by private vessel. This percentage has held steady for several years and represents about 14,000+ visitors.
- The number of delegate days hosted by the Victoria Conference Centre was largely flat between 2012 and 2015 (hovering around 100,000) but increased by 10.6% in 2016.

D. OVERVIEW OF GREATER VICTORIA VISITOR MARKETS

Broadly speaking, Greater Victoria's key tourism markets can be viewed from the perspective of visitor origin or visitor segment. From a visitor origin perspective, Destination Greater Victoria's 2017–2021 Strategic Plan identifies three broad target markets (i.e., Domestic, USA, International) and 12 specific target markets with Seattle, Vancouver and San Francisco viewed as primary markets, and Calgary and Portland viewed as secondary markets. Over the longer term, potential emerging long-haul markets for the area include Mexico, India, Brazil and South Korea.

In terms of visitor market segmentation, Destination Greater Victoria broadly identifies two key markets; leisure and business/conference. Leisure travellers represent about 93% of all visitors in the summer season and about 89% of all visitors in the off-season. Within the leisure segment, Destination Greater Victoria targets visitors representing three of the 12 North American EQ segmentation types — Authentic Experiencers, Cultural Explorers and Free Spirits.

The business/conference segment represents about 7% of visitors in the summer season and 11% of visitors in the off-season. Most current business activity is generated by meetings, conferences or incentive travel (e.g. team-building) of Canadian associations, unions, First Nations and small to medium-sized corporations. Over the longer term, Destination Greater Victoria's Business Events Victoria (BEV) division is targeting corporate meetings representing sectors that align with the planning area's competitive advantages (i.e. marine, aerospace, technology and clean/green technology, natural resources, agriculture and food, life and health sciences). Destination Greater Victoria has also been focusing on sport tourism as a specific target market. This sector of the tourism industry for Victoria is somewhat constrained by the relatively small size of the convention facilities and locations for off-site venues capping capacity at up to 800 delegates.

In terms of visitor characteristics, while most visitors are from Canada, the planning area also hosts visitors from around the world with the majority of international visitors coming from the U.S. Although the U.S. market went through some “ups and downs” over the last couple of decades, the number of U.S. residents arriving in Canada via Greater Victoria customs points of entry increased in each of the last three years (2014–2016) exceeding 800,000 in 2016. Additionally, the number of international visitors (not including U.S. residents) who entered Canada via customs points of entry in Greater Victoria over the period 2013–2015 increased by 22% rising from 72,283 in 2013, to 88,079 in 2015, with Australia and New Zealand, and the United Kingdom accounting for the most entries, and Brazil (+83%) and China (+74%) accounting for the greatest rates of growth.

Of visitors who used the Visitor Centre in 2016, more than four in 10 (42%) were only in town for the day, while another 40% were here for one or two nights, and only 2% were staying in the area for a week or more. In terms of party composition, a scrape of TripAdvisor data indicates the greatest proportion of visitor parties identify as couples (44%), followed by family groups (23%) with only 5% of visitors indicating they are travelling by themselves.

E. GREATER VICTORIA DESTINATION ASSESSMENT OVERVIEW (SWOT)

From a tourism destination perspective, the Greater Victoria planning area benefits from a range of strengths.

However, it is also facing a number of destination development challenges including some that have the potential to impact the future growth and sustainability of the tourism sector. To build on these strengths and address these challenges, the

planning area's tourism partners have identified a number of key opportunities that form the foundation of the Greater Victoria DDS. These key strengths, challenges and opportunities are summarized on the next page in no particular order.

FIGURE 9: Strengths, Challenges and Opportunities

KEY STRENGTHS	KEY CHALLENGES	KEY OPPORTUNITIES
<ul style="list-style-type: none">• Access options• Historic architecture and heritage sites• Marine-oriented assets and opportunities• Mix of iconic and new attractions• Parks and gardens• Scenic, natural beauty• Unique vibe• Walkability/trails• Wineries/local food	<ul style="list-style-type: none">• Limited capacity at peak times (hotels, ferries)• Lack of off-site venues for hosting larger events• Seasonality of activities and demand• Shortage of affordable workforce housing• Regional highway capacity limitations• Customer service• Perception the region is difficult to access	<ul style="list-style-type: none">• Conference and event space• Complete Belleville St. Terminal• Ogden Point re-development• Off-season events, activity and tour opportunities• Leverage opportunities in Sooke to Port Renfrew corridor• Enhanced air and marine gateway role

6

A DISTINCTIVE DIRECTION

SEA CIDER
Photo: Darshan Photography

A. A STRATEGIC VISION FOR TODAY AND TOMORROW

The following vision statement reflects the aspirations of tourism partners of what Greater Victoria will look like as a destination in 10 years. In turn, the goals, objective, and actions outlined in this strategy complement and support the achievement of this vision (see also Appendix C for Greater Victoria's destination development vision story).

GREATER VICTORIA DESTINATION DEVELOPMENT VISION



AS A PREMIER GATEWAY TO VANCOUVER ISLAND, GREATER VICTORIA IS AN ENERGETIC, CULTURED AND BEAUTIFUL DESTINATION WITH A CREATIVE VIBE, WHERE THE JOURNEY TO THE REGION MARKS THE BEGINNING OF A SEAMLESS VISITOR EXPERIENCE. A RANGE OF HIGH-QUALITY, YEAR-ROUND ACTIVITY OPTIONS SUPPORT THE CREATION OF REMARKABLE VISITOR MEMORIES AS WELL AS A HEALTHY AND SUSTAINABLE TOURISM INDUSTRY. VISITORS LEAVE FEELING REFRESHED, ENERGIZED AND INSPIRED TO BE AMBASSADORS FOR THE REGION.

B. GOALS

In support of Greater Victoria’s Destination Development vision, the following six goals will be pursued.

FIGURE 10: Greater Victoria’s Destination Development Goals



C. GREATER VICTORIA DDS THEMES / DEVELOPMENT PILLARS

Over the course of the Destination Development Planning process for Greater Victoria, dozens of potential destination development initiatives that could be implemented in support of the planning area's destination development goals were identified.

The outcomes of two tourism stakeholder workshops, two tourism stakeholder surveys, interviews, the Situation Analysis, and input from the working group were used to determine which of these initiatives should be included in this DDS.

While all of the initiatives identified over the course of this project have merit, it was recognized that it would be

unrealistic from both a staffing and financial resources perspective to pursue all identified initiatives. Rather, the potential for success would be enhanced by focusing efforts on key, high priority initiatives that will have the greatest impact on ability of the planning area to achieve its destination development vision and goals. The 27 strategic priorities identified are grouped by the following seven themes.

FIGURE 11: Greater Victoria's Destination Development Themes



7

STRATEGY AT A GLANCE

MOSS ROCK PARK
Photo: Reuben Krabbe

FOLLOWING IS A SUMMARY OF THE 27 INITIATIVES THAT ARE INCLUDED IN THIS DDS, SORTED ACCORDING TO THE PLANNING AREA'S SEVEN DESTINATION DEVELOPMENT THEMES.

The identification of the strategic initiatives in this plan reflect the culmination of an industry engagement process and the hands-on involvement of a working committee.

As part of the industry engagement process, a range of potential destination development opportunities were identified.

An industry survey was used to create an initial list of high priority opportunities, which were refined during an industry workshop, and then further refined by the working committee. More detailed actions for each of these initiatives are presented in Section 8.

THEME 1: Completing or undertaking significant tourism infrastructure projects: Industry representatives have indicated the ability of Greater Victoria to further leverage its tourism appeal is being constrained by the limitations of key tourism infrastructure. For example, while Ogden Point is currently an active cruise ship port, the ability to build on this potential could be notably enhanced if home-port status were achieved. Similarly, while the potential exists to attract more conferences and events, this potential is constrained by the

limited number of appropriate venues — especially out of the downtown core.

To help address key infrastructure issues, the following strategic priorities have been identified:

1. Support completion of the redevelopment of the Belleville Street Terminal project
2. Develop Ogden Point as a year-round, multi-use, tourism, commercial and resident asset
3. Establish Ogden Point as a cruise ship home-port that will contribute to the development of additional visitor products
4. Continue pursuing plans to expand the harbour pathway within the downtown core and potentially beyond to adjacent municipalities
5. Develop interesting off-site conference and event venue(s) capable of accommodating large groups

THEME 2: Improving access to and transportation within the planning area: While access to Greater Victoria is often viewed as part of the visitor's travel experience, making it easy for people to get to and around the planning area has been identified as a priority by the tourism industry. For example, from an access point of view, it was noted that Greater Victoria has the potential to benefit from capacity constraints in Vancouver and Seattle by expanding local air and marine access opportunities. In terms of local transportation, the tourism industry has highlighted a number of key initiatives that will encourage visitors to move through the planning area and improve their visitor experience.

To help address key transportation issues, the following strategic priorities have been identified:

6. Continue to enhance the planning area's role as a gateway for air and marine carriers
7. Support YYJ expansion to accommodate direct flights from the U.S. and other hubs
8. Continue to pursue expansion of U.S. Customs pre-clearance operations at key Greater Victoria access/egress points
9. Support the development of a regional approach to transportation planning that takes the needs of visitors into account
10. Invest in ongoing improvements to Highways 14, 17 and 1
11. Enhance transit/transportation connections between downtown Victoria and outlying areas of the planning area, and between downtown Victoria and

other areas of Vancouver Island

12. Establish more tour bus parking downtown

THEME 3: Enhancing and protecting the visitor experience: Tourism is a highly competitive industry and Greater Victoria is competing for visitors from many provincial, national, and global destinations. To maintain and improve its competitiveness, tourism representatives identified the importance of enhancing and protecting the visitor experience to generate positive word-of-mouth and social media commentary.

The following key opportunities have been identified:

13. Encourage more operators to work together with other operators to create products and experiences that help grow and disperse visitor activity throughout the planning area
14. Raise awareness of the importance of excellent customer service among all visitor-serving businesses
15. Improve cellular access in the Sooke to Port Renfrew corridor, and to Mesachie Lake
16. Work with operators (e.g. tour buses) to encourage scheduling that minimizes the potential for excess visitor demand at key locations and times
17. Improve wayfinding signage within the planning area and especially between Sooke and Port Renfrew (e.g. signage to key beaches, etc.) and at YYJ.
18. Support key destination sustainability initiatives with a key focus on protecting the Southern Resident Orca Whale (SROW) population.

THEME 4: Increasing off and shoulder-season products and experiences: Like many destinations, tourism activity in Greater Victoria varies by season with the greatest number of visitors coming in the summer, and the least number of visitors coming in the winter. One of the challenges currently facing Greater Victoria's tourism industry is capacity constraints (e.g. accommodation, transportation) in the summer season.

While progress has been made in improving shoulder-season visitor activity through targeted tourism and marketing initiatives, the ability of the planning area to increase off and shoulder-season visitor activity could be enhanced via the following opportunity:

19. Develop more shoulder and off-season experiences and increase shoulder and off-season business meeting activity.

THEME 5: Supporting industry development: The availability of enough visitor accommodation to meet demand is a key supply related criterion for growing Greater Victoria's tourism industry. One of the results of the upward trend in visitation that Greater Victoria has been experiencing over the last few years has been an increase in commercial accommodation shortages during high demand times (e.g. summer weekends). As visitor demand continues to grow, and even assuming some of it can be dispersed to other times of the year, it will be critical to ensure that visitors can find commercial accommodation that meets their needs.

Supporting the development of additional commercial accommodation is the focus of the following opportunity:

20. Ensure that there are clearly defined and approved zones or clusters throughout the planning area ready for all short-term commercial accommodation types (e.g. fixed roof, hostels, campgrounds) and levels (e.g. mid-level; higher end) that developers can leverage when market conditions warrant.

THEME 6: Meeting industry labour force needs: Like other areas of the province, Greater Victoria's tourism and hospitality sector is facing growing labour shortages affecting the ability to provide quality and/or timely services and, in some cases, leading operators to consider decreasing their hours of

operation. While a variety of demographic, social and other factors have contributed to these labour force shortages, in Greater Victoria two of the key issues affecting labour force availability are the shortage of appropriately trained hospitality staff, and the need for more affordable workforce housing.

Helping to address these challenges is the focus of the following two opportunities:

21. Improve the link between employers and post-secondary hospitality training programs to better ensure the job skills and attitudes needed by employers are reflected in the training being provided by post-secondary hospitality programs

22. Support the provision/development of affordable housing for employees.

THEME 7: Enhance the policy and regulatory climate for business success: The business climate created by the policies and regulations put in place by local, regional, provincial and federal governments can have significant implications for the tourism sector — both positive and not so positive.

The following policy and regulatory issues have been identified as priorities for supporting the sustainable, ongoing growth of Greater Victoria's tourism sector:

23. Advocate to the federal government to adjust foreign worker regulations to allow for the recruitment of foreign workers to fill semi-skilled positions

24. Increase municipal government awareness of the economic impact of tourism

25. Pursue clarity and clear policy(ies)/regulation(s) regarding the sharing economy (e.g. short-term commercial accommodation rentals, tour services, transportation services)

26. Address regulatory and liability issues related to access to Crown land that are limiting tourism potential related to motorized and non-motorized recreational use and foraging activities

27. Pursue policies/regulations related to protecting special places and ecological landmarks.

STRATEGIC PRIORITIES

THE FAIRMONT EMPRESS HOTEL
Photo: Tanya Goehring

Additionally, the priority designation of each initiative is identified using the priority setting framework provided by Destination BC. Presenting the destination development plans using a consistent framework will allow the province to examine the various priorities across all planning areas to identify those which belong within a regional or provincial strategy.

The facilitation team used this framework to identify the priority of each initiative and relative timing for implementation. Those initiatives categorized as either a priority 1 or 2 are included in this strategy.

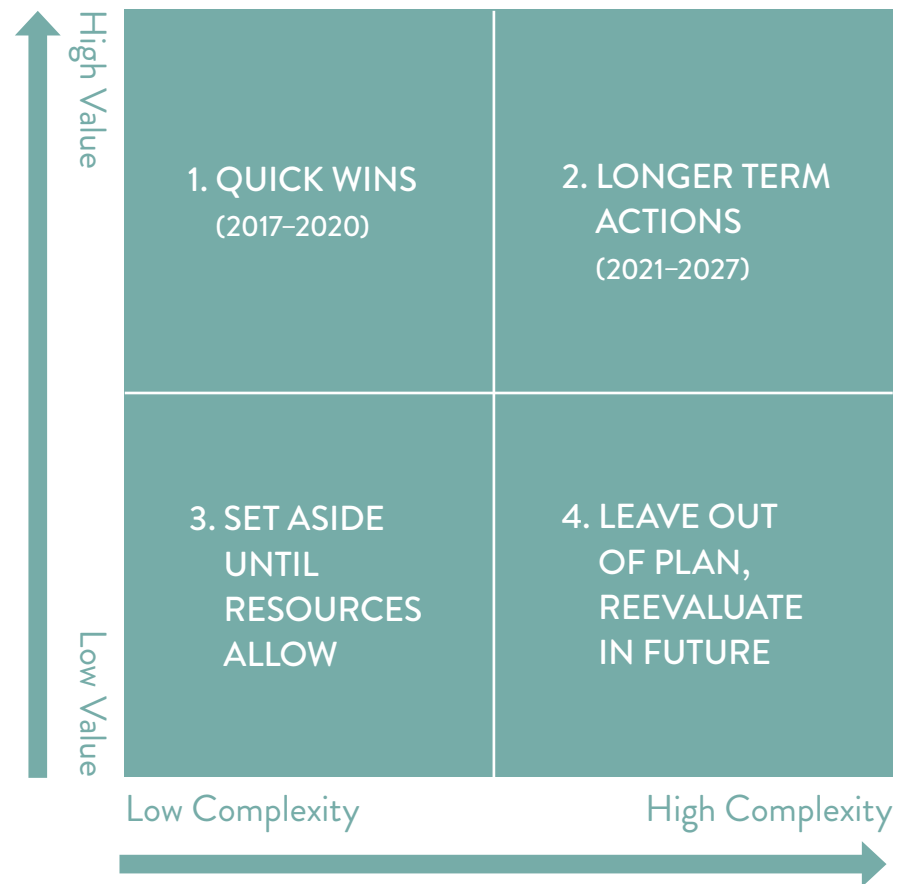
1. QUICK WINS high value tactics with low complexity that can be achieved within 3 years (2017–2020).

2. LONGER TERM ACTIONS high value, high complexity tactics that require 4

to 10 years to achieve results (2021–2027) albeit implementation of tactics can begin immediately.

3. SET ASIDE UNTIL RESOURCES ALLOW low complexity and low value tactics, address when time/resources exist.

4. LEAVE OUT OF PLAN, RE-EVALUATE IN FUTURE high complexity and low value, not realistically achieved in the 10-year time frame of this strategy.



Overall responsibility for leading implementation of the Greater Victoria DDS, as well as for undertaking a number of specific initiatives, will fall to Tourism Victoria. Additionally, given the scope of the destination development initiatives identified for the planning area, successful implementation of specific initiatives will require the active engagement of a range of partners, and will likely require the support of a champion(s) who is willing to commit to shepherding initiative implementation. As such, the ultimate success of the DDS will rest heavily on the degree of

DDS joint ownership felt and exercised by these partner organizations, as well as on the extent of the practical commitments (time and money) given in support of its implementation.

The success network* is identified, and where the proposed objective has provincial or regional scope beyond this planning area, it is noted. The objectives listed within the themes do not represent all the opportunities that emerged during the planning process, but those that emerged as a higher priority for tourism destination development.

*Organizations and partners listed under the success networks have been identified collectively through the strategy development process as likely playing a role in moving a potential objective or action forward. In no way is this meant to suggest any form of commitment or endorsement of the objective or action.

A. OBJECTIVES AND ACTIONS

There are 27 objectives identified for Greater Victoria as a tourism destination for the next 10 years. This section outlines the objectives by each theme, the priority and relative timing for implementation. It also identifies the priority actions

within each objective. This is not an exhaustive list of all tactical implementation activities. It should be noted that some of the objectives and actions may require their own detailed implementation plans.

THEME 1: COMPLETING KEY TOURISM INFRASTRUCTURE PROJECTS

OBJECTIVES	PRIORITY
1 Support completion of the redevelopment of Belleville Street Terminal Project (Phase 3). ACTIONS <ul style="list-style-type: none"> Continue to encourage the provincial Minister of Transportation and Infrastructure to actively pursue both federal and provincial funding for Phase 3 of the Belleville Terminal Development. SUCCESS NETWORK Greater Victoria's municipal governments, Province of BC (TRAN), Black Ball Ferry, Victoria Clipper, Destination Greater Victoria, Esquimalt and Songhees First Nations, federal government, USCBP	2. LONGER TERM ACTIONS
2 Develop Ogden Point as a year-round, multi-use, tourism, commercial and resident asset. ACTIONS <ul style="list-style-type: none"> Continue to lobby for approval from Victoria City Council regarding the GVHA's Master Plan and re-zoning (two separate approval processes that are running parallel). Pursue funding from the federal government to support building of a new terminal and achievement of the home-port goal (see also Objective 3). Support development of a First Nations Cultural Centre at Ogden Point (through development of a business case that determines building, operating costs and funding responsibility). Explore opportunities for retrofitting or providing the facilities needed to accommodate pocket cruise ships at Ogden Point to develop the small ship cruising sector in the Salish Sea. SUCCESS NETWORK All GVHA member agencies (8), provincial government (TAC, TRAN), City of Victoria, Destination Greater Victoria, Tourism Vancouver Island, Gulf Islands, Ahoy BC	2. LONGER TERM ACTIONS
3 Establish Ogden Point as a cruise ship home-port that will contribute to development of additional visitor products. ACTIONS <ul style="list-style-type: none"> Continue to pursue the establishment of customs and immigration pre-clearance services in the planning area (see Objective 8 for more details). Identify pre/post land-based excursion opportunities (separate from cruise shore excursions) which can be used both to raise awareness of the business development potential or home-porting as well as to ensure that the planning area is prepared to leverage this potential once home-porting is approved. For example, a network of culinary, cultural, heritage and nature opportunities could be used to help attract cruise ship visitors to enjoy local experiences. SUCCESS NETWORK All GVHA, TIABC, TIAC, provincial government, City of Victoria, Destination Greater Victoria, cruise lines, USCBP, tourism operators	1. QUICK WINS CATALYST

OBJECTIVES	PRIORITY
<p>4 Continue pursuing plans to expand the Harbour Pathway within the downtown core and potentially beyond to adjacent municipalities.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Encourage the ongoing implementation of a phased approach to completing the Harbour Pathway. • Explore options to extend the Harbour Pathway beyond the currently planned route to other parts of the planning area. <p>SUCCESS NETWORK City of Victoria, Destination Greater Victoria, GVHA, provincial government, Black Ball Ferries, Clipper Navigation, other Greater Victoria municipalities through which the pathway could be extended</p>	<p>2. LONGER TERM ACTIONS</p>
<p>5 Develop interesting off-site conference and event venue(s) capable of accommodating large groups.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Document the scope of the conference and event business, and the associated economic impacts that have been lost over the last two years to help establish a business case related to the creation of new venue(s). • Use (above) business case as the basis for discussions with municipal and provincial government economic development staff to identify (private) operators or landowners with suitable venue space/property available. Then, engage with these operators to discuss venue needs and opportunities. • Support the inclusion of a multi-use event space as part of the Ogden Point development plan (see also Objective 2). <p>SUCCESS NETWORK Destination Greater Victoria, Victoria Conference Centre, major conference hotels, provincial and municipal government economic development staff, operators or landowners of potential venue space, GVHA, other tourism partners</p>	<p>2. LONGER TERM ACTIONS</p> <p>CATALYST</p>

THEME 2: IMPROVING ACCESS TO AND TRANSPORTATION WITHIN THE PLANNING AREA

OBJECTIVES	PRIORITY
<p>6 Continue to enhance the planning area's role as a gateway for air and marine carriers.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Continue to prioritize the role and activities of Destination Greater Victoria's TDMC especially as they identify and address key transportation issues and opportunities (see Appendix D). Engage a broader range of partner participation in the TDMC via biennial special-purpose meetings (to discuss specific air and marine gateway issues and initiatives). Work with staff from the Policy Branch of the TAC to identify who, and which members of, the TDMC should meet to discuss specific air and marine gateway issues and initiatives. Pending the outcome of the review of Ogden Point facilities to accommodate pocket cruise ships (see Objective 2), encourage the development of Ogden Point as a marine gateway for pocket and boutique cruise lines touring the Salish Sea and Gulf Islands, in a manner that complements the "Experience the Gulf Islands" and other related initiatives. <p>SUCCESS NETWORK Destination Greater Victoria (Chair of the TDMC), BC Ferries, Clipper Navigation, Harbour Air, cruise lines, GVHA, all levels of government as applicable by initiative</p>	<p>1. QUICK WINS</p> <p>PROVINCIAL SCOPE</p> <p>REGIONAL SCOPE</p>
<p>7 Support YYJ expansion to accommodate direct flights from the U.S. and other hubs.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Encourage and cheerlead the airport as it moves forward with plans to implement its 10-year plan that meets the needs of visitors and locals. Review and respond to the long-standing public belief that a longer runway is required to attract longer haul flights (e.g. new carbon-fiber planes are lighter and don't necessarily require a longer runway). <p>SUCCESS NETWORK Destination Greater Victoria, TDMC, partner groups, Greater Victoria Airport Authority</p>	<p>1. QUICK WINS</p> <p>CATALYST</p> <p>PROVINCIAL SCOPE</p> <p>REGIONAL SCOPE</p>
<p>8 Continue to pursue expansion of U.S. Customs pre-clearance operations at key Greater Victoria access/egress points.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Using the findings of the PNER-funded pre-clearance feasibility study, continue working with and lobbying USCBP to support the provision of pre-clearance services in Greater Victoria. <p>SUCCESS NETWORK Greater Victoria Harbour Authority, USCBP, cruise line and other carriers, City of Victoria, Destination Greater Victoria TDMC, TIABC, TIAC, TAC, federal government/CBSA, TRAN (provision of clearance facilities at Belleville)</p>	<p>1. QUICK WINS</p> <p>CATALYST</p> <p>REGIONAL SCOPE</p>
<p>9 Support the development of a regional approach to transportation planning that takes the needs of visitors into account.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> As the CRD Regional Transportation Plan is updated, advocate to ensure that it is responsive to visitor and resident needs, and is focused on improving the (inter-modal) flow of people (visitors and residents) and goods through both the planning area and beyond to other areas of Vancouver Island. Pursue plans to update Destination Greater Victoria's Passenger Gateway Strategy and consider what more could be done to encourage a regional approach to transportation planning that takes the needs of visitors into account. <p>SUCCESS NETWORK Greater Victoria municipal governments, Destination Greater Victoria, TDMC, CRD, provincial government, BC Transit and other transit service providers, Greater Victoria tourism industry, Greater Victoria Chamber of Commerce</p>	<p>2. LONGER TERM ACTIONS</p>

OBJECTIVES	PRIORITY
<p>10 Invest in ongoing improvements to Highways 14, 17 and 1.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Lobby the provincial government to develop overpasses at both the Highway 17 Keating X-Road exit and at Haliburton and Highway 17 to enhance the visitor experience and better enable the dispersion of visitors around the planning area. • Advocate the provincial government to enhance the safety of Highway 14 (West Coast Highway) by adding pull-outs, as well as signage advising drivers to use the pull-outs to let traffic pass if they are holding up four or more vehicles. • Recognizing that the Malahat is close to capacity, support efforts to plan for the development of a new highway that is parallel to but inland from the Malahat <p>SUCCESS NETWORK Municipal governments</p>	<p>2. LONGER TERM ACTIONS</p>
<p>11 Enhance transit/transportation connections between downtown Victoria and outlying areas of the planning area and between downtown Victoria and other areas of Vancouver Island.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Continue to work with and encourage private operators who are pursuing the establishment of visitor tours and commuter transportation services within Greater Victoria and up island. • Engage in discussions with BC Ferries regarding the option of using a larger ferry on the Brentwood Bay to Mill Bay route. • Encourage inter-regional air carriers to monitor route demands between Greater Victoria and up island with a view to identifying new or enhanced flight route options. • Continue to encourage research into and the potential development of common-sense rail opportunities (e.g. with the Island Corridor Foundation relinquishing control of the E&N rail-line between Langford and Vic West, a private developer is currently promoting the establishment of a commuter rail service on this route). <p>SUCCESS NETWORK Destination Greater Victoria, TDMC, BC Ferries, private operators, YYJ, municipal governments, air carriers, federal and provincial governments</p>	<p>2. LONGER TERM ACTIONS</p> <p>REGIONAL SCOPE</p>
<p>12 Establish more tour bus parking downtown.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Continue to pursue plans to develop a tour bus parking strategy documenting parking supply/demand and identifying actions leading to the provision of new bus parking space. Key steps include: <ul style="list-style-type: none"> - Consulting with tour operators on parking needs and how far from downtown they are willing to park - Consulting with City of Victoria, other municipalities, Songhees and Esquimalt First Nations to identify potential bus parking sites - Meet with Robbins Parking to determine whether there are any under-utilized surface lots that could accommodate tour buses. <p>SUCCESS NETWORK Destination Greater Victoria, TDMC, City of Victoria, other CRD municipalities, Esquimalt and Songhees First Nations, tour operators</p>	<p>1. QUICK WINS</p>

THEME 3: ENHANCING AND PROTECTING THE VISITOR EXPERIENCE

OBJECTIVES	PRIORITY
<p>13 Encourage more operators to work together with other operators to create products and experiences that help grow and disperse visitor activity throughout the planning area.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Continue undertaking “lunch and learn” sessions with tourism operators focused on discussing and modeling opportunities for creating seamless packages. • Continue to identify itinerary options within the planning area (e.g. circle routes) and bring potential product providers together to discuss package creation (assumes pricing of product components will remain distinct). Include itineraries focused on the shoulder and winter seasons that incorporate products or experiences offered by (non-traditional) operators. • Linked to the previous action, present new/enhanced tour itinerary concepts to operators and encourage them to pursue these opportunities. • Raise awareness of, and encourage tourism operators to participate in, Destination BC’s Remarkable Experiences program, which includes a module focused on the development of partnerships. • Support District of Sooke plans to develop an East-West trail connector that will link with the recently opened “Sea to Sea Park” component of the “Great Trail” (formerly the Trans Canada Trail) between the Malahat and Humpback Road <p>SUCCESS NETWORK Destination Greater Victoria, tourism operators, Destination BC, Tourism Vancouver Island, Sooke area tourism operators, Sooke Chamber of Commerce, CRD, provincial government</p>	<p>2. LONGER TERM ACTIONS</p>
<p>14 Raise awareness of the importance of excellent customer service among all visitor-serving businesses.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Encourage the provincial government to include customer service training in the high school curriculum (as it applies to many economic sectors, not just tourism and hospitality). • Identify key visitor touchpoint areas where businesses would benefit from having their staff receive customer service training. Share information on the role their business plays in the visitor experience, as well as available customer service training options <p>SUCCESS NETWORK Provincial Ministry of Education, go2HR, Destination Greater Victoria</p>	<p>2. LONGER TERM ACTIONS</p> <p>PROVINCIAL SCOPE</p>
<p>15 Improve cellular access in the Sooke to Port Renfrew corridor and to Mesachie Lake.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • As major telecom providers have advised Sooke/Port Renfrew that they will not improve cellular coverage in this planning area due to prohibitive service costs, advocate the provincial government to entice carriers (e.g. via shared investment) to improve coverage in the interest of addressing safety concerns, communications and navigation challenges <p>SUCCESS NETWORK District of Sooke, Destination Greater Victoria (in cooperation with Sooke Regional Tourism Association), provincial government</p>	<p>2. LONGER TERM ACTIONS</p> <p>PROVINCIAL SCOPE</p>
<p>16 Work with operators (e.g. tour buses) to encourage scheduling that minimizes the potential for excess visitor demand at key locations and times.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Consult with BC Ferries about implementing a yielding strategy (e.g. setting premium tour bus pricing on the 9:00 am ferry) to encourage tour operators to consider other ferry time options. • Encourage tour bus operators offering day-trip itineraries to expand those itineraries to include an overnight stay • Continue to install electrical charging stations, especially in high bus tour traffic areas to enable the use of electric buses (to reduce emissions) <p>SUCCESS NETWORK Destination Greater Victoria (to lead consultation with BC Ferries), tour bus operators, Greater Victoria municipalities and the CRD</p>	<p>1. QUICK WINS</p>

OBJECTIVES	PRIORITY
<p>17 Improve wayfinding signage within the planning area, especially between Sooke and Port Renfrew (e.g. signage to key beaches) and at YYJ.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Identify key access points in the Sooke to Port Renfrew corridor requiring signage (e.g. beach access areas) and review associated potential directional and interpretive opportunities. • Work with the Victoria Airport Authority to assess the need for improved airport access signage at the McTavish interchange. • Present information resulting from Actions 1 and 2 above (i.e. high priority signage needs/areas) to the provincial government and advocate for signage installation <p>SUCCESS NETWORK Destination Greater Victoria (working with District of Sooke, the CRD and the Airport Authority), Sooke to Port Renfrew tourism partners, TRAN</p>	<p>1. QUICK WINS</p>
<p>18 Support key destination sustainability initiatives.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Advocate to address the three key fisheries issues that are seriously threatening the SROW: <ul style="list-style-type: none"> -1. Fish habitat protection — key to long-term SROW population growth -2. Prey or fish availability enhancement (e.g supporting hatcheries, removing dams) -3. Fisheries management (e.g. addressing over-fishing). • Linked to the previous action, advocate to address SROW population risk issues related to: <ul style="list-style-type: none"> -1. Oil spill risk management -2. Ocean acoustics management (i.e. addressing the negative impacts to the SROW population due to sound generated by large ships, seaplanes, kayakers etc.) • Consider having Greater Victoria either adopt the UNWTO model for tracking the environmental sustainability of the local tourism industry, or developing a “made in BC” model for this purpose (e.g. this could potentially be an outcome of the Eco Impact Conference). Establishing a sustainability tracking model, or a tourism observatory in Greater Victoria, would demonstrate commitment to sustainability; contribute to a better understanding of local sustainability challenges and opportunities. • Examine what’s involved in establishing and implementing a framework and process for assessing tourism carrying capacity in a meaningful way. Carrying capacity can be viewed from three key perspectives: physical-ecological; socio-demographic; and/or political-economic. For Greater Victoria, physical-ecological considerations should be the priority focus. <p>SUCCESS NETWORK Pacific Whale Watch Association, Centre for Fisheries Research, DFO, Sport fishing industry, Salish Sea Marine Survival Project, tourism industry, Destination Greater Victoria, tourism operators, post-secondary institutions, possibly provincial and various levels of government</p>	<p>1. QUICK WINS</p> <p>PROVINCIAL SCOPE</p>

THEME 4: INCREASING OFF AND SHOULDER-SEASON EXPERIENCES

OBJECTIVES	PRIORITY
<p>19 Develop more shoulder and off-season experiences, and increase shoulder and off-season business meeting activity.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Increase focus on the implementation of Destination Greater Victoria's business meeting strategy including enhanced targeting of meeting organizers, and tracking and reporting of results (to inform strategy adjustments). • Continue to monitor the "destination draw" events that are scheduled in the planning area to identify scheduling gaps and target events to fill these gaps (focusing on events that are consistent with the planning area's brand, and will generate overnight visits). A complementary approach could involve shifting the date of some existing events that are not weather-dependent. • Leverage and maximize the economic impact of off-season events and business meetings, work with operators to develop pre and post event programs or products that can be used to encourage event and meeting participants to increase their length of stay. This could include encouraging operators to take advantage of the Destination BC Remarkable Experiences program. <p>SUCCESS NETWORK Destination Greater Victoria, conference/meeting event organizations, tourism operators, Destination BC (Remarkable Experiences program)</p>	1. QUICK WINS
	CATALYST

THEME 5: SUPPORTING INDUSTRY DEVELOPMENT

OBJECTIVES	PRIORITY
<p>20 Ensure there are clearly defined and approved zones or clusters throughout the planning area ready for all short-term commercial accommodation types (e.g. fixed roof, hostels, campgrounds) and levels (e.g. mid-level, higher end) that developers can leverage when market conditions warrant.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Continue educating municipal planners and councils (especially in Saanich and the West Shore) regarding growth in tourism, the implications for land needs, and the benefits of establishing approved zones for commercial accommodation development. • Work with municipal planners to identify four or five nodes suitable for short-term visitor accommodation development and secure appropriate zoning designations (as applicable) for these nodes. Policy opportunities to encourage the viability of more mid-level accommodation should also be considered. • As short-term accommodation development nodes or sites are identified, provide location information to developers. • Work with the BC Lodging and Campgrounds Association (BCLCA) to determine campground-related zoning, development issues and opportunities in the planning area. <p>SUCCESS NETWORK Destination Greater Victoria (in consultation with TAC and the BCLCA), Greater Victoria Hotel Association, Municipal government staff, possibly campground operators</p>	2. LONGER TERM ACTIONS

THEME 6: MEETING INDUSTRY LABOUR FORCE NEEDS

OBJECTIVES	PRIORITY
<p>21 Enforce the link between employers and post-secondary hospitality training programs to better ensure that the job skills and attitudes needed by employers are reflected in the training being provided by post-secondary hospitality programs.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Meet with tourism employers to discuss and identify: <ul style="list-style-type: none"> - the specific labour force skills that are lacking by sub-sector of the industry (i.e. job skills needs assessment) - other issues that need to be addressed (e.g. unrealistic job expectations, pay levels etc.). • Linked to action above, share the input provided by tourism employers with post-secondary institutions and with the provincial government's "Business and Tourism Educators Group" with a view to raising awareness of how post-secondary tourism programs can better respond to these needs. • Encourage post-secondary institutions with tourism programs to modify their curriculum to better meet key employer skill needs and to provide students with realistic expectations regarding job and wage opportunities. • Encourage post-secondary institutions with tourism programs to establish cooperative programs (if they haven't already done so) as such programs are recognized for the important role they play in both raising student awareness of tourism industry employment opportunities and skill requirements, in helping students find long-term work, and employers find employees <p>SUCCESS NETWORK Destination Greater Victoria, go2HR, tourism operators, post-secondary institutions with tourism programs, Business and Tourism Educators Group</p>	2. LONGER TERM ACTIONS
	PROVINCIAL SCOPE
<p>22 Support the provision/development of affordable housing for employees.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> • Engage with go2HR regarding conducting additional research (building on the work they have done to date on this issue) to determine what kind of innovative workforce housing solutions have been used effectively in other locations where affordability and/or availability are issues (e.g. dormitories, trailers, micro-housing, worker camps, shared housing, boarding). • Continue to raise awareness among local governments of the need for, and the impact of not having, more affordable workforce housing, including sharing the results of research findings (e.g. from the previous action) showing housing strategies that have worked elsewhere. • Conduct research to provide case studies of the financial impact of raising staff wages and being able to increase business revenue potential (e.g. having the staff needed to stay open longer). Depending on the outcome of these case studies, use them to encourage employers to raise wages <p>SUCCESS NETWORK go2HR, TIABC, Destination Greater Victoria, TDMC, municipal governments, other tourism industry associations</p>	2. LONGER TERM ACTIONS
	PROVINCIAL SCOPE

THEME 7: ADDRESSING INDUSTRY-CONSTRAINING POLICIES AND REGULATIONS

OBJECTIVES	PRIORITY
<p>23 Advocate to the federal government, as required, to adjust foreign worker regulations to allow for the recruitment of foreign workers to fill semi-skilled positions.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Continue to communicate and advocate for changes to the TFWP to address the critical labour force needs of the tourism and hospitality sector. <p>SUCCESS NETWORK TIAC, TIABC, provincial government, RDMOs, go2HR, tourism employers</p>	1. QUICK WINS
	PROVINCIAL SCOPE
<p>24 Increase municipal government awareness of the economic impact of tourism.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Research and document information regarding the economic impact of tourism at the municipal level (e.g. identifying and plotting the location of the top 30 employers by size to demonstrate tourism employment in each municipality; documenting the municipal property tax impacts of tourism businesses). Continue organizing “lunch and learns” with (and considering offering “fam tours” to) municipal and council representatives to: <ul style="list-style-type: none"> tell the tourism story share information regarding the economic impacts of tourism in their municipality Explain how tourism aligns with community priorities <p>SUCCESS NETWORK Destination Greater Victoria, tourism employers, statistical agencies or data organizations, municipal governments, Tourism Vancouver Island</p>	1. QUICK WINS
	REGIONAL SCOPE
<p>25 Pursue clarity and clear policy(ies)/regulation(s) regarding the sharing economy (e.g. short-term commercial accommodation rentals, tour services, transportation services).</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Continue to build on the collaboration and work done to date on the sharing economy issue by bringing partners together to encourage dialogue and education regarding the sharing economy, the need for, and the benefit of, appropriate regulations and policies. Broaden participation in Destination Greater Victoria’s TDMC to provide additional resources and skills to help address the sharing economy issue as required <p>SUCCESS NETWORK Destination Greater Victoria, TDMC, TIABC, TIAC, regulators, Consumer Protection BC, municipal governments, media</p>	1. QUICK WINS
<p>26 Address regulatory and liability issues related to access to Crown land that are limiting tourism potential related to motorized and non-motorized recreational use and for foraging activities.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Bring tourism, CRD and Western Forest Products partners together to discuss the interest in off-road activities, the opportunity to establish designated areas for these activities, and a workable model for addressing liability issues (e.g. recreational user self-insurance — see action below also). Linked to the previous action, consult with mountain biking clubs and stakeholders in the Central Island Region (e.g. Regional District of Nanaimo) and in the Cumberland/Campbell River area who are in various stages of establishing land use agreements with area timber companies on the use of forest lands for recreational purposes (to understand the approaches being considered or taken to address trail use liability and management issues). <p>SUCCESS NETWORK Sooke-Port Renfrew tourism partners, CRD, Western Forest Products, provincial government</p>	2. LONGER TERM ACTIONS
	CATALYST
	REGIONAL SCOPE

OBJECTIVES	PRIORITY
<p>27 Pursue policies/regulations related to protecting special places and ecological landmarks.</p> <p>ACTIONS</p> <ul style="list-style-type: none"> Encourage the provincial government to establish a clear set of guidelines and steps, as well as an efficient process for applying for protected status for ecological landmarks. <p>SUCCESS NETWORK Provincial government, CRD, municipal governments, tourism partners</p>	2. LONGER TERM ACTIONS
	PROVINCIAL SCOPE

CATALYST PROJECTS

The following six initiatives are identified as catalyst projects for spurring the growth potential of the tourism sector in the Greater Victoria Destination Development planning area:

1. Establish Ogden Point as a cruise ship home-port that will contribute to the development of additional visitor products (Initiative 2).
2. Develop interesting off-site conference and event venue(s) capable of accommodating large groups (Initiative 5).
3. Support YYJ expansion to accommodate direct flights from the U.S. and other hubs (Initiative 7).
4. Continue to pursue expansion of U.S. Customs pre-clearance operations at key Greater Victoria access/egress points (Initiative 8).
5. Develop more shoulder and off-season experiences, and increase shoulder and off-season business meeting activity (Initiative 19).
6. Address regulatory and liability issues related to access to Crown land that are limiting tourism potential related to motorized and non-motorized recreational use, and for foraging activities (Initiative 26).

9

MEASURING AND MONITORING SUCCESS

Ultimately, the overall objective of this Destination Development Strategy (DDS) is to help guide the growth of Greater Victoria's tourism sector in an economically, socially and environmentally sustainable manner over the next 10 years.

To determine whether this overall objective is being achieved, success can be measured from the following two main perspectives:

1) The progress being made relative to the implementation of each strategic initiative

2) The progress being made relative to the impact of implemented initiatives on achieving Greater Victoria's six destination development goals. This progress can be measured from a quantitative (attributable) or qualitative (non-attributable) perspective

In terms of measuring the progress in achieving the planning area's six DDS goals, the following table presents possible measurement options that could be considered:

TABLE 2: Recommended Measures for Tracking Progress in Achieving Greater Victoria's DDS Goals

GOALS	RECOMMENDED MEASURES
Enhance and protect the quality of the visitor experience	<ul style="list-style-type: none"> • Net Promoter Score⁵ (NPS) trends for the planning area • Trends in online reviews by visitors regarding their stay in the area (generally) and/or of specific products and experiences • Trends in awareness and desirability of the destination (on a seasonal basis or by date ranges) to determine when best to schedule events and/or focus marketing activity
Foster a collaborative working environment amongst Greater Victoria tourism partners	<ul style="list-style-type: none"> • Examples of partners working together on various tourism initiatives • Examples of operators working together to develop new products and/or packages • Regular survey of tourism partners aimed at tracking levels of collaboration
Encourage operators to establish new and/or enhanced tourism attractions and experiences	<ul style="list-style-type: none"> • Number of new and/or enhanced attractions and experiences established each year by category (and, net number of attractions and experiences by category — to account for any closures)
Enhance the seasonal and regional dispersion of visitors	<ul style="list-style-type: none"> • Occupancy by season • Occupancy by sub-region (e.g. Saanich Peninsula, core, West Shore, Sooke-Port Renfrew) • Transportation trends by season • Visitor surveys (what parts of the planning area were visited)
Increase the contribution of tourism to the regional economy	<ul style="list-style-type: none"> • MRDT revenue trends • Occupancy rate trends (reflects increased visitation and/or increases in overnight stays) • Average room rate trends • Revenue Per Available Room (RevPAR) trends • Total visitor revenue and/or trends in average visitor spending per day (based on regular visitor surveys) • Trends in the value of investments in tourism infrastructure and products (public and private) • Transportation ridership/use trends
Increase resident and municipal awareness of tourism (so that tourism interests are reflected in municipal planning processes)	<ul style="list-style-type: none"> • References to tourism interests/issues in municipal planning documents • Extent to which tourism interests/issues are considered as part of municipal planning processes • Number and type of initiatives that engage residents with and/or raise their awareness of tourism

⁵Net Promoter Score calculation: www.destinationbc.ca/Resources/Monitoring-and-Evaluation/Net-Promoter-Score.aspx



10

PROVINCIAL INITIATIVES

COASTAL VICTORIA
Photo: Tanya Goehring

A KEY DELIVERABLE OF THE DESTINATION BC DESTINATION DEVELOPMENT PROGRAM IS THE CREATION OF REGIONAL AND PROVINCIAL STRATEGIES.

Objectives and actions that are shared commonly across the Greater Victoria planning area may not become regional or provincial priorities but, at the very least, will inform the creation of both the Vancouver Island Regional Destination Development Strategy and the Provincial Destination Development Strategy.

There are a number of initiatives from the Greater Victoria Destination Development Strategy that could be encompassed as part of the Vancouver Island and Provincial Strategy. These are summarized below.

Roll-up Projects for Vancouver Island Region Destination Development Strategy

1. Continue to enhance the planning area's role as a gateway for air and marine carriers (Initiative 6).
2. Support YYJ expansion to accommodate direct flights from the U.S. and other hubs (Initiative 7).

3. Continue to pursue expansion of U.S. Customs pre-clearance operations at key Greater Victoria access/egress points (Initiative 8).

4. Enhance transit/transportation connections between downtown Victoria and outlying areas of the planning area, and between downtown Victoria and other areas of Vancouver Island (Initiative 11).

5. Increase municipal government awareness of the economic impact of tourism (Initiative 24).

6. Address regulatory and liability issues related to access to Crown land that are limiting tourism potential related to motorized and non-motorized recreational use, and for foraging activities (Initiative 26).

Roll-up Projects for Provincial Destination Development Strategy

1. Continue to enhance the planning area's role as a gateway for air and marine carriers (Initiative 6).
2. Support YYJ expansion to accommodate direct flights from the U.S. and other hubs (Initiative 7).
3. Raise awareness of the importance of excellent customer service among all visitor serving businesses (Initiative 14).
4. Improve cellular access in the Sooke to Port Renfrew corridor and to Mesachie Lake (Initiative 15).
5. Support key destination sustainability initiatives (Initiative 18).
6. Improve the link between employers and post-secondary hospitality training programs to better ensure that the job skills and attitudes needed by employers are reflected in the training being provided by post-secondary hospitality programs (Initiative 21).
7. Support the provision/development of affordable housing for employees (Initiative 22).
8. Advocate to the federal government, as required, to adjust foreign worker regulations to allow for the recruitment of foreign workers to fill semi-skilled positions (Initiative 23).
9. Pursue policies/regulations related to protecting special places and ecological landmarks (Initiative 27).



IMPLEMENTATION AND FUNDING

Destination BC has compiled a list of funding programs that could potentially be tapped in to support of the implementation of various destination development initiatives (Contact Destination BC for a copy of this information sheet). Of the funding programs identified by Destination BC, the ones that may apply to Greater Victoria include:

- Municipal and Regional District Tax (MRDT)
- Destination BC Programs and Western Economic Diversification Canada (WD)
- Ministry of Transportation and Infrastructure Programs
- Community Gaming Grants
- Community Trusts
- Municipal Funding and Business Levies

In addition to the above programs, the provincial government has an online tool on their website that can be used to help find funding options.

www2.gov.bc.ca/gov/content/employment-business/economic-development/funding-and-grants

APPENDIX

APPENDIX A: OVERVIEW OF THE PLANNING PROCESS

The Greater Victoria Destination Development Strategy, which is one of 20 strategies being created throughout the province, was developed over the course of seven months.

The overall process was guided by a planning structure that has been developed by Destination BC to allow for the creation of consistently structured plans across planning areas, as well as the subsequent creation of regional and provincial roll-up plans. Destination BC's planning structure is flexible and allows for the customization needed to ensure the unique circumstances of the Greater Victoria planning area are reflected throughout the planning development process.

Key to the success of this planning process was the early and ongoing involvement of key tourism partners who provided pivotal input through the various stages of the process.

The key steps involved in the Greater Victoria destination development planning process are summarized in the following figure and then described in more detail.

DEC 2017	<ul style="list-style-type: none">• Project initiation stakeholder session• Stage setting — data research and analysis
JAN 2017	<ul style="list-style-type: none">• Identification of issues and opportunities (stakeholder survey)• Prepare Situation Analysis
FEB 2017	<ul style="list-style-type: none">• Stakeholder workshop• Review Situation Analysis, draft DDS vision, and goals
MAR 2017	<ul style="list-style-type: none">• Follow-up stakeholder engagement• Survey on draft vision and goals
APR 2017	<ul style="list-style-type: none">• Prepare draft list of DDS priority themes and strategic initiatives• Working Group session to review themes, initiatives, and frame action plans
MAY 2017	<ul style="list-style-type: none">• Follow-up engagement with stakeholders• Creation of draft DDS identifying vision, goals, themes, priority strategic initiatives, and actions

1. KICK-OFF SESSION December 12, 2016: This session provided participants (24) with an overview of the Destination Development Planning process and some contextual information on the current status of the tourism sector in the planning area. Additionally, this session was used to obtain initial input from participants regarding core attractors of, and key tourism issues and opportunities facing the planning area. At the conclusion of the session, a brief visioning exercise was held. The results of this exercise form the groundwork for Session 3 (Working Group session).

2. COLLECTION, REVIEW AND ANALYSIS OF BACKGROUND REPORTS AND RELEVANT SECONDARY SOURCE RESEARCH DATA.

3. STAKEHOLDER SURVEY January to early February 2017: A link to an online survey was distributed by Destination Greater Victoria to 106 tourism stakeholder on January 19, 2017 with a closing date of February 3, 2017. The survey asked respondents to rank a range of constraints and opportunities in terms of their importance to the development of tourism in Greater Victoria. These lists of constraints and opportunities were created based on input provided by those stakeholders who attended the December 12, 2016 kick-off session. Respondents were also asked to add any other constraints and opportunities not included in the lists. At the conclusion of the survey period, 46 surveys (representing a 43% response rate) had been completed, and the results have been

incorporated into Section 4.5 of the Situation Analysis.

4. PREPARATION OF THE SITUATION ANALYSIS December to early February 2017.

5. STAKEHOLDER SESSION 2/3 COMBINED February 16, 2017: This session focused on reviewing the Situation Analysis and creating the vision that will frame the Greater Victoria Destination Development Strategy.

6. SECOND STAKEHOLDER SURVEY: This survey was distributed in March 2017 as a follow-up to the February 16 stakeholder session and focused on identifying the vision and priority goals for the Greater Victoria Destination Development Strategy.

7. WORKING GROUP MEETINGS AND INPUT: A Working Group comprised of 12 tourism stakeholders was created and tasked with providing guidance and input related to the substance of the Destination Development Strategy.

8. MEETING WITH SOOKE PORT RENFREW TOURISM STAKEHOLDERS: This meeting was focused on receiving input from tourism stakeholders regarding key tourism development issues and opportunities in the Sooke — Port Renfrew part of the planning area.

9. PREPARE THE GREATER VICTORIA DESTINATION DEVELOPMENT STRATEGY.

APPENDIX B: PLANNING CONSIDERATIONS

Based on the findings of the Greater Victoria Destination Development Situation Analysis (available in a separate document) and input from tourism stakeholders, this section summarizes key aspects of the tourism planning context for Greater Victoria and identifies the planning area's top tourism development planning issues and opportunities.

TOURISM PLANNING CONTEXT

Tourism “supply” information indicates the planning area offers visitors a variety of tourism assets that are largely rated by visitors as excellent or very good. Tourism “demand” information indicates that the numbers of visitors coming to the planning area are increasing, resulting in improved business performance for many tourism operators. Moving forward, global and national tourism trends point to continued

overall increases in tourism demand and growing interest in the type of visitor experiences available in Greater Victoria. Furthermore, awareness of the tourism assets of the planning area has benefitted from the accolades reported in influential travel publications such as Conde Nast magazine.

In many respects, Greater Victoria is in an enviable position from a tourism sector perspective. Strong growth in visitation is encouraging significant investment in new tourism products and services, as well as significant re-investment in the rejuvenation of existing tourism products and services (estimated at ~\$100 million). These improvements to the planning area's tourism assets are helping to keep them fresh and appealing to visitors, and to protect and enhance the competitiveness of the planning area. In terms of opportunities, the planning area is well-positioned to continue to grow its

tourism economy. To ensure this growth occurs in a manner that protects the health and sustainability of the tourism assets and resources upon which it depends, as well as the quality of the visitor experience, it will be prudent to start looking at the planning area's tourism carrying capacity. Given this context, the timing seems optimal for the creation of an industry supported destination development strategy.

TOURISM DEVELOPMENT PLANNING PRIORITY ISSUES AND OPPORTUNITIES

Based on stakeholder workshop and survey input, the following is a list of key destination development planning considerations for Greater Victoria.

1. Infrastructure, transportation and access

Key issues related to infrastructure, transportation and access was identified as follows:

- highway capacity limitations within the planning area
- limited availability of vehicle and bus parking downtown, especially during peak periods
- limited public transportation options to the West Shore area and beyond Sooke, as well as between Greater Victoria and other points on Vancouver Island
- lack of affordable housing for the tourism workforce

The following key opportunities have been identified to leverage the planning area's infrastructure, transportation and access strengths, and to help address its weaknesses:

- continuing to enhance the planning area's role as a gateway for air and marine carriers
- supporting the development of a regional approach to transportation planning that takes the needs of visitors into account
- completing the Belleville Terminal project
- developing Ogden Point as a cruise terminal able to support home-porting
- completing the Harbour Pathway
- investing in ongoing improvements to Highways 1, 14, and 17, and enhancing transportation connections between downtown and outlying areas of the planning area

2. Visitor experience, product development and sense of place

Greater Victoria is seen by many visitors as an appealing tourism destination that provides a variety of quality products ranging from iconic built attractions to varied and highly scenic nature-based assets that support a wide array of activities. Additionally, the planning area is recognized for its distinct history reflected in its heritage architectural assets and historical sites. These assets — when combined with a vibrant local “farm to table” food and beverage culture, various arts and cultural assets, and a range of festivals, etc. — work together to create a unique sense of place, and an appealing vibe for visitors. However, despite the planning area's visitor experience, product development and sense of place strengths, a number of challenges exist which, if not addressed, could have an impact on the ongoing growth and sustainability of the sector.

Key issues identified by stakeholders include:

- availability of enough commercial and approved rooms and campsites at peak times in the summer (linked to visitor seasonality patterns)
- lack of interesting, off-site spaces to host larger meetings and events
- raising awareness of the critical role social media is playing in destination awareness, ensuring visitor expectations are being met and exceeded (e.g. via the provision of excellent customer service etc.)

The above challenges are closely linked to key destination development opportunities for the planning area, identified by stakeholders as:

- working with municipalities to identify approved zones/ clusters for the development of new short-term commercial accommodations
- developing more shoulder and off-season products and experiences (especially those that will help disperse visitors throughout the planning area)
- developing Ogden Point as a multi-use tourism and resident asset
- creating an arts and cultural district
- educating visitor-serving businesses across sectors about the nature and value of providing excellent customer service

3. Industry development (i.e. capacity, partnership development, labour)

Despite the planning area's mature and multi-faceted tourism sector, it is not without its industry development issues. For example, stakeholders identified the following key issues:

- some visitors view access to the planning area as a barrier (because it is on an island)
- seasonal fluctuations in visitor demand create labour challenges for both tourism employers (e.g. trying to find seasonal workers) and tourism employees (e.g. trying to find full-time work)
- with recent changes to federal rules related to temporary foreign workers, some employers are having trouble finding the right staff at the right time
- strong visitor demand risks detracting from the visitor experience at some locations and times
- the lack of analysis related to carrying capacity creates a substantial information gap when it comes to making informed, responsible tourism development decisions, and ensuring the visitor experience is not degraded

Key opportunities to address the above industry development issues were identified by stakeholders to include:

- encouraging operators to work together to create a seamless and memorable visitor experience
- training tourism operators on how to create and/or provide a high-value, quality product experience (i.e. with a focus on improving yield rather than numbers)
- encouraging stakeholders to work together to lobby the federal government to adjust foreign worker regulations to

allow for the recruitment of foreign workers to fill lower-skilled positions

- improving the link between employers and post-secondary hospitality training programs to better ensure the job skills needed by employers are reflected in the training being provided by post-secondary hospitality programs

4. Policy and regulatory

There are a number of policy and regulatory factors that impact the development of the planning area's tourism sector. Stakeholders have indicated that key issues include:

- changes to the Temporary Foreign Worker Program (which has contributed to staffing shortages)
- lack of clarity regarding short-term rentals and the sharing economy (which can create unfair competition)
- development challenges resulting from the diverse administrative and development processes of 13 municipalities with different bylaws

Key policy and regulatory opportunities related to destination development include:

- lobbying the federal government to address challenges with the Temporary Foreign Worker Program
- developing a regional approach to transportation planning (which ties into the "access" issues referenced earlier)
- streamlining local government tourism development regulatory requirements
- communicating the importance of tourism and its value to the planning area to ensure tourism interests are considered as part of municipal tourism planning initiatives, and to enhance municipal willingness to streamline their tourism development regulatory requirements

APPENDIX C: VISION STORY

In Greater Victoria old-world tradition meets new-world experiences. Our visitors are rejuvenated by fresh ocean air and inspired by our warm island welcome and year-round natural beauty.

Although we attract visitors representing a range of ages and travel motivations, our destination is particularly appealing to travellers seeking authentic, West Coast, high-value experiences built around our beautiful natural resources, the safety and cleanliness of the community, and our cultural and heritage offerings — including our iconic architecture and our “farm to table” food and beverage dining scene. Additionally, we value our business event and conference visitors who help contribute to the viability of our hospitality businesses outside of the busy summer season.

The experience of our visitors starts when they travel to Vancouver Island with a trip that is enabled by a network of high-quality, efficient marine and air transportation options that set the tone for their island getaway. Upon arrival, visitors immediately feel welcomed and valued. Whether they are staying in the area for two days or two weeks, visitors enjoy a seamless travel experience that is characterized by coordinated transportation and wayfinding resources, the

availability of a range of short-term, quality accommodation options, and access to a variety of distinct, authentic, and memory-making experiences. The overall visitor experience is influenced and molded by the planning area’s distinctive northwest vibe.

Tourism and hospitality employers have a professional and well-trained workforce from which to draw, while tourism and hospitality employees have access to year-round employment opportunities and affordable workforce housing. Additionally, the planning area’s tourism stakeholders are collaborating on initiatives that contribute to the ongoing strength and vitality of the sector.

There is recognition amongst tourism stakeholders and policy-makers that our destination needs to be managed in a manner that ensures its ongoing economic and environmental sustainability, and protects the quality of the visitor experience. In turn, residents of the planning area recognize the valuable contribution that tourism makes to the local economy and to their quality of life. Residents play a key role in welcoming visitors, providing them with meaningful opportunities to engage with locals, and to create life-long memories of their time in our community.

APPENDIX D: Transportation and Destination Management Committee



Transportation and Destination Management Advisory Committee

Terms of Reference

Statement of Purpose

The Transportation and Destination Management Advisory Committee will (a) advise on development of an overarching destination management strategy for Greater Victoria, (b) recommend integrated responses for Tourism Victoria to emerging transportation and destination management public policy issues, and (c) share information and work collaboratively to maximize access to and capacity for our destination in a sustainable manner. The Committee will develop and implement an Annual Workplan to fulfil the duties set out below.

Roles and Responsibilities

To review and address local and inbound transportation issues relating to the tourism industry within Greater Victoria and provide advice and recommendations to the Executive and the Board on:

1. Achieving the Strategic Objectives for Destination Management by working with industry on select but critical supply side drivers of destination success in a sustainable manner;
2. Tourism Victoria's annual Business Plan and strategies to achieve priorities;
3. Achieving Balanced Scorecard performance measurement targets, where applicable; and
4. Key policy files on transportation and destination management access to our destination, such as:
 - a) Inner Harbour Redevelopment; and
 - b) Pre-Clearance in the Inner Harbour.

Committee Composition

The Committee will comprise Board Directors and Tourism Victoria Members who have demonstrated interests and experience in destination management sustainability and transportation issues, or have responsibilities in transportation infrastructure or carrying and welcoming high volumes of visitors.

Executives in Support

CEO

GREATER VICTORIA VISITORS AND CONVENTION BUREAU
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APPENDIX E: BIBLIOGRAPHY

The majority of information in this plan was obtained from survey and workshop input provided by the individuals who participated in project engagement activities. Additionally, the websites of numerous organizations and statistical agencies served as key sources of data and information. Beyond these sources, the main documents that were reviewed include the following:

MUNICIPAL DOCUMENTS:

- District of Central Saanich Official Community Plan
- City of Colwood Official Community Plan
- Township of Esquimalt Official Community Plan
- District of Highlands Official Community Plan
- City of Langford Official Community Plan
- District of Metchosin Official Community Plan
- District of Oak Bay Official Community Plan
- District of North Saanich Official Community Plan
- District of Saanich Official Community Plan
- Town of Sidney Official Community Plan
- District of Sooke Official Community Plan
- City of Victoria Official Community Plan
- Town of View Royal Official Community Plan

OTHER DOCUMENTS:

- BC Parks. *Protecting our Legacy Together: BC Parks Future Strategy* (undated)
- Capital Regional District Bylaw 3591. *A Bylaw to Establish an Official Community Plan for the Rural Resource Lands* (March 2010)
- The Mayor's Task Force on Economic Development and Prosperity Action Plan. *Making Victoria – Unleashing Potential* (undated)
- Destination Greater Victoria. *Messaging Toolkit – Communicating our Destination* (2014)

